Tech Tip Tuesday: How to Set Custom Report Disclaimers

Today's Tech Tip Tuesday post focuses on one important topic: Report Disclaimers. Did you know that you have not one, not two, but three different levels at which you can set custom disclaimers? Whether you need a single firm-wide disclaimer or you need to set individual disclaimers for each Rep, you can do it all within Orion Connect.

Let's dive into how to use each level of report disclaimer, and where you can go in Orion Connect to set up each type:

Firm Level

This is a global disclaimer that shows on **all** custom reports.

How to Access It…Send your verbiage to the Reporting Team so they can make the update for you if you'd like to implement a firm-wide disclaimer.

Rep Level

Do you have multiple reps who all need their own disclaimer? This is the setting for you. And, it's a setting you can control yourself. This type of disclaimer will display on reports *in addition* to the firm-level disclaimer, if one is present.

How to Access It…Rep disclaimers are managed in Firm Profile > Representatives. Select a Representative to edit and go to the Reports section under Options. Add your desired verbiage and Save.

☒ Report Level

This type of disclaimer is added in Report Builder when creating or editing a custom report and will display on reports in addition to the Firm-level disclaimer and the Rep-level disclaimer, if they are present.

How to Access It…Add a sub-report in "Report Builder" and then find the "Report Disclaimer" setting in "Report Options" to set your custom text.

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Disclaimer Template

With this option, you can take disclaimers from their usual place at the end of a report and elevate them to every-page status.

How to Access It…To get a Report-Level disclaimer to show on the bottom of every page of a custom report, select Disclaimer from the Template dropdown when creating or editing a report in the Report Builder app. If there are Firm-level or Rep-level disclaimers, they will still populate at the end of the report. ☒

Default Disclaimers

When creating a custom report in the Report Builder app, anything index-related will populate an "Index Disclaimer" and a "Report Data Disclaimer" will populate at the end of the report with information such as "net of fees" vs. "gross of fees" and performance calculation methods.

Disclaimers can also be added to some tiles within the Insight app and the Client Portal.

The functionality covered in Tech Tip Tuesday is available and ready to use right now in Orion Connect. **If you want more training about the information covered in this article**, log into Orion Social to access our full knowledge base, and use the Ascent app for online, on-demand training resources.

Not working with Orion yet? Click here to get in touch with us.