

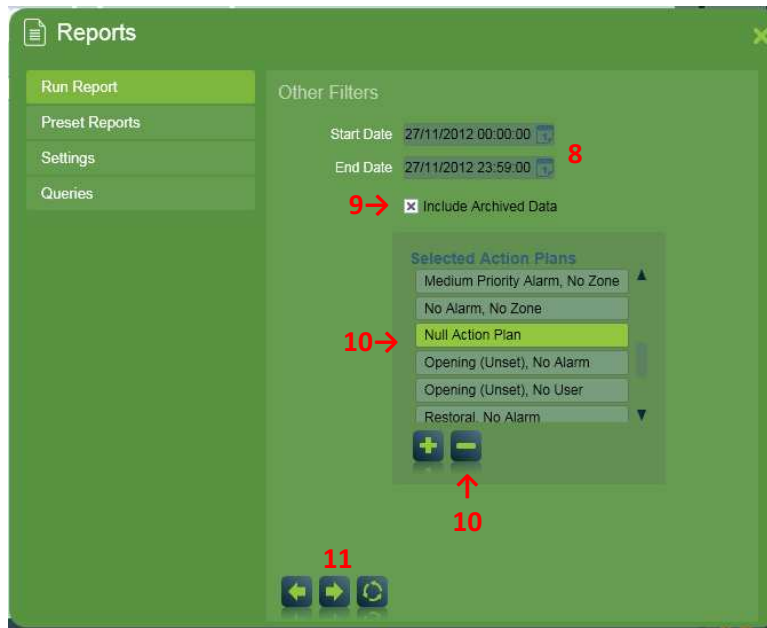
## Generating Reports (Multiple Clients)



1. Click on Reports button. The Reports window will appear.
2. On the right of the Reports window, select the type of report you wish to generate.
3. Click on the Next button.



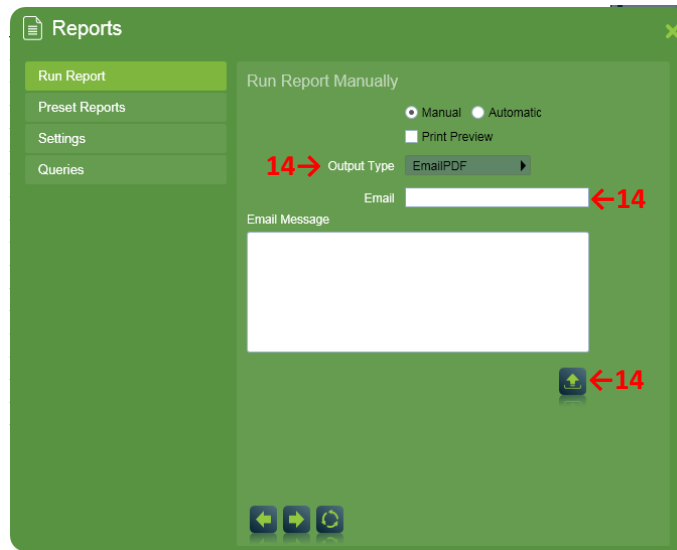
4. Select the how the clients should be ordered/listed. Either by Name or by Account number.
5. Select the First Client. A Client Search window will appear. Double click on the client you wish to select.
6. Select the Last Client. A Client Search window will appear. Double click on the client you wish to select.
7. Click on the Next button.



8. Set the length of the report by setting the Start Date and End Date. A calendar will pop up. Select the dates and time as required.
9. Tick the Include Archived Data check-box.
10. By default, all signals (based on their Action Plans) are included in the report. If you want to exclude any signals from the report, select the relevant Action Plan and click on the Delete button.
11. Click on the Next button.



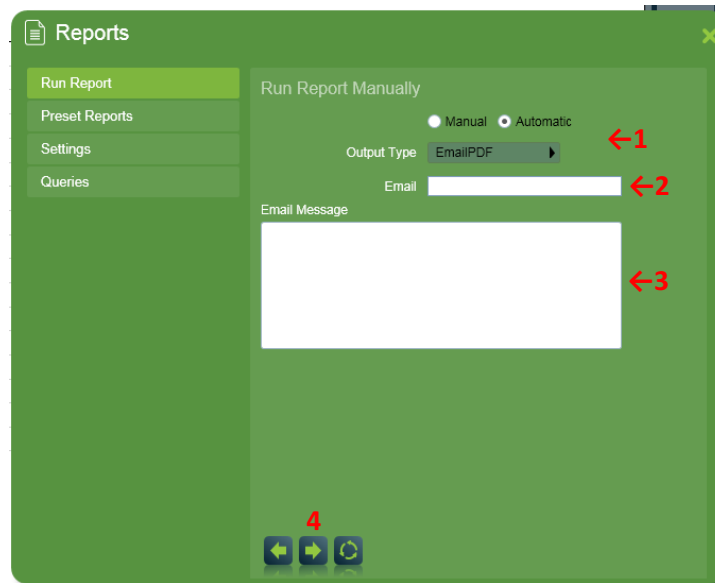
12. If you wish to see the report, tick the Print Preview check-box, and then click the Run Report button.
13. If you wish to print the report, **untick** the Print Preview check-box, then select Printer as the Output Type. Then click Run Report.



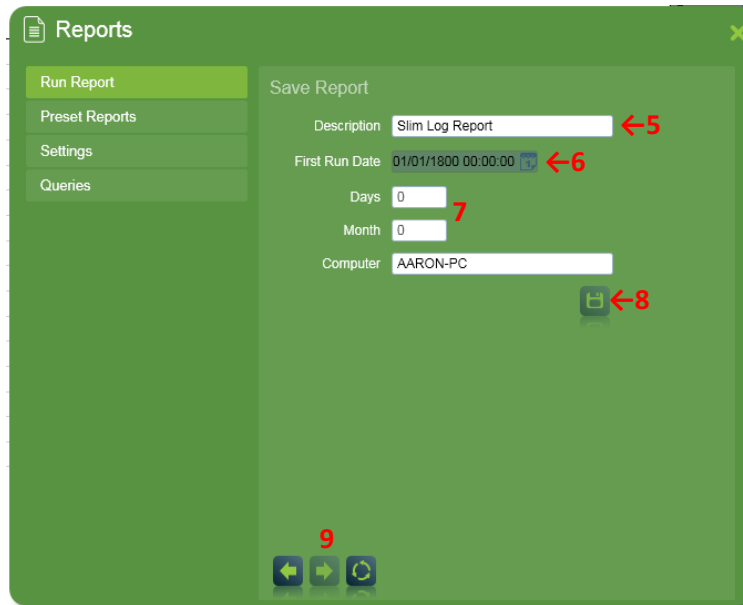
14. If you wish to email the report, select the Output type as EmailPDF, EmailWord or EmailXL based on the format you wish to send (PDF, Word document or Excel document respectively). Insert the email address and message, then click the Run Report button.

## For Automatic Email sent Daily/Weekly/Monthly etc.

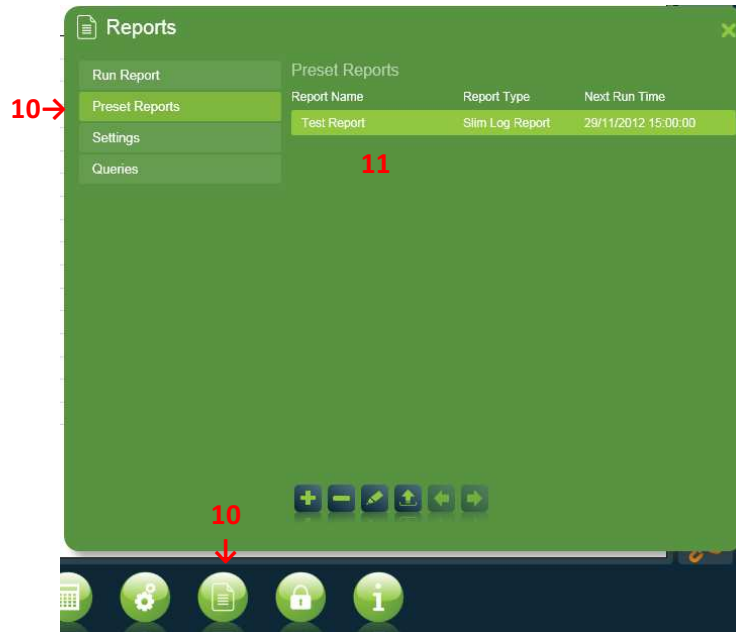
\*Continuing from the previous steps\*



1. Select Automatic. Select the Output type as EmailPDF, EmailWord or EmailXL based on the format you wish to send (PDF, Word document or Excel document respectively).
2. Type in the email address of the recipient. Only one email address is allowed.
3. Type in the email message.
4. Click on the Next button.



5. Type in a name for the report. This is the name that will appear in the Preset Reports list.
6. Select the date and time for the first time the report is to be sent.
7. Select the repetition of the report. For example, if it is to be sent every week, set Days to 7. If it is to be sent daily, set Days to 1. If it is to be sent monthly, set Monthly to 1.
8. Insert the name of the computer where the email will be sent from. This computer must have Internet access. If you are unsure, leave it at default.
9. Click Save.



10. Click on Reports button in the main menu, then Preset Reports.

11. Check to make sure your automatic report has been added to the list.