

## IMPORTING/ EXPORTING OF PROJECTS AND MY TEMPLATES

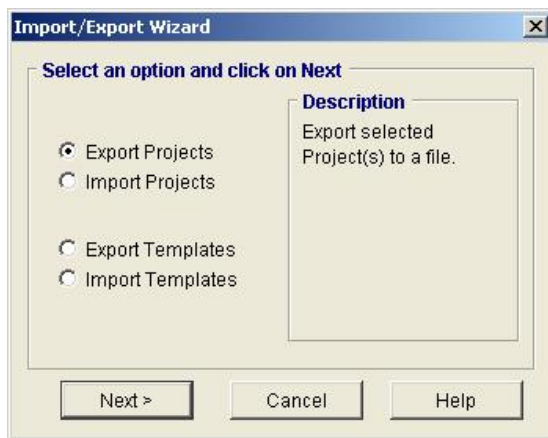
### 1. Importing/ Exporting

**Purpose:** Importing/ Exporting of Projects and My Templates facilitates the transfer of Projects and My Templates to another computer.

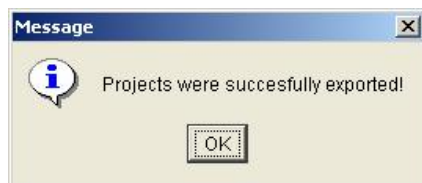
**Process:** Export individual projects or my templates to a floppy, CD or alternative drive by selecting Export Project from the File Menu and then, on another computer, import the individual projects or my templates by selecting Import Project from the File Menu. No files will be overwritten on the destination computer.

Export steps:

1. Click File Menu and Select Import/Export



2. Select option i.e. Export Projects and click Next
3. Select the projects or templates to be exported or Select All and click on Export
4. In the Export Projects/Templates dialog window insert the destination drive or location e.g. desktop or CD Rom drive.
5. Name the file and Click Save
6. A confirmation of a successful export should then be received.

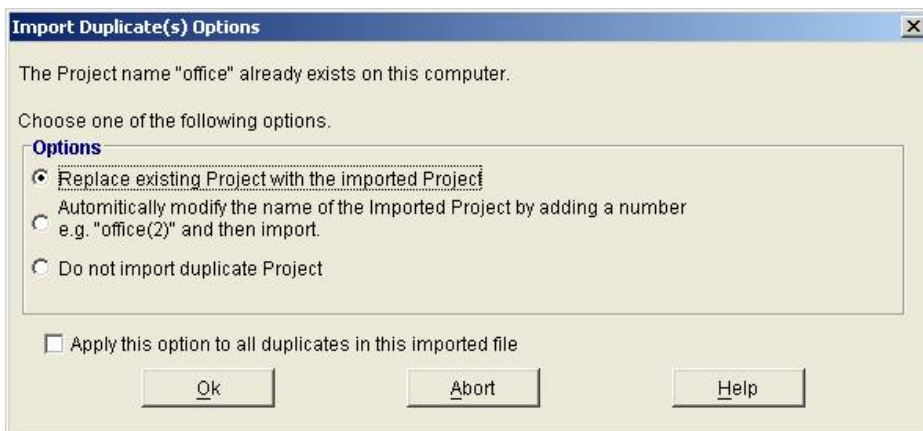


Import steps:

1. Click File Menu and Select Import/Export



2. Select option i.e. Import Projects and click Next
3. In the Import Projects/Templates dialog window locate the file containing the projects to be imported.
4. From the Import Project dialog window select the projects to be imported or click on the Select All button.
5. Click the Import button.
6. If the selected projects are duplicates of projects on the destination computer the Import Duplicate(s) Option dialog window appears ( see below). Select the appropriate option.



7. Click OK

8. A confirmation of a successful export should then be received.



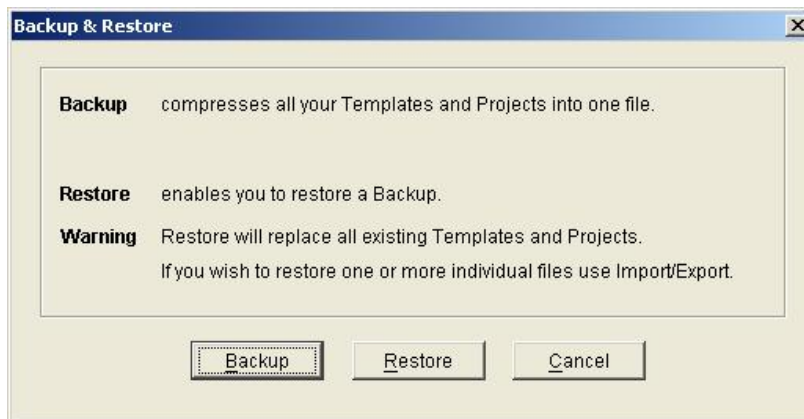
## 2. Backup/ Restore.

**Purpose:** Backup is used to make a copy of the whole data file containing all user projects and templates to a storage device such as CD, zip drive or other external storage device. Restore is used to replace an existing data file containing all user projects and templates with the one that was generated with the Backup routine.

**Process:** Backup the whole data file containing all user projects by selecting Backup from the Utilities Menu or by using the Backup/Restore button on the Navigation Panel. Then restore all user projects and templates from the backup data file to another or the same computer installed with Investit Pro by selecting Restore from the Utilities Menu or by using the Backup/Restore button on the Navigation Panel. NB All existing files on the destination drive will be overwritten.

Backup steps:

1. Click Utilities Menu / Backup/Restore or the Backup/Restore button on the Navigation Panel

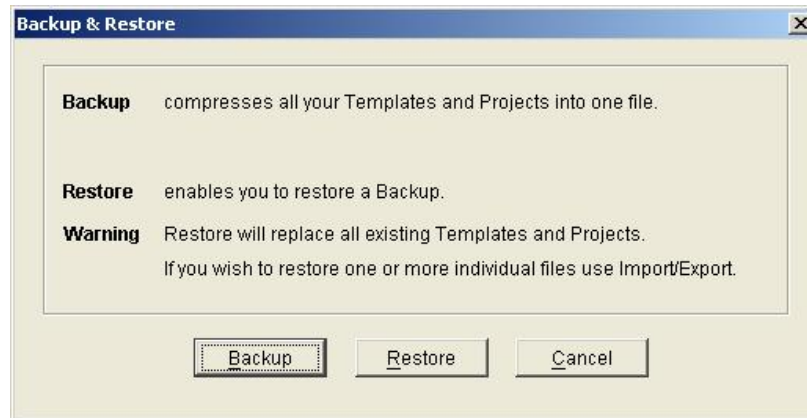


2. Click the button for action to be performed. i.e. Backup.
3. In the Save dialog box insert destination drive or location e.g. desktop or CD Rom drive.
4. Name the file and Click Save to complete the process
5. A confirmation of a successful backup should then be received.

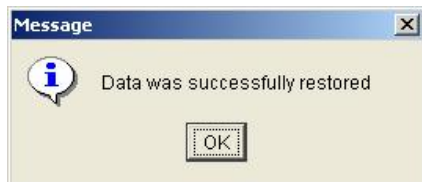


Restore steps:

1. Click Utilities Menu / Backup/Restore or the Backup/Restore button on the Navigation Panel



2. Click the button for action to be performed i.e. Restore.
3. In the Open dialog box locate the file containing the previously backup file.
4. Click Open to complete the process.
5. A confirmation of a successful restore should then be received.



## **Export Reports to MS Excel or Export Reports to PDF.**

### **Exporting Reports to MS Excel.**

**Purpose:** Exporting Reports to MS Excel enables the user to apply additional formatting to customize the reports or apply additional formulas to the output data.

**Process:** Export one or more Reports seamlessly to a MS Excel file by selecting Export Reports to Excel from the Reports Menu and following the onscreen instructions. Alternatively, export an individual report open in the report preview window by clicking on the Export to Excel button and following the onscreen instructions.

### **Exporting Reports to PDF.**

**Purpose:** Exporting reports to PDF format enables the reports to be viewed with Adobe Acrobat Reader on computers not installed with Investit Pro. The PDF report files created can be sent as e-mail attachments for others to view and print out the reports.

**Process:** Create one or more PDF files by selecting Export Report to PDF from the Reports Menu and following the on screen instructions. Alternatively, export an individual report open in the report preview window by clicking on the Export to PDF button and following the onscreen instructions.