



HR Online Guide

This guide is intended to assist you in the use of the InterRetire HR Desktop program. Should you not be able to find an answer in this booklet, please refer to the technical support area for information.

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1 Take on Data

1.1 Importing data to the system.

If you have a large amount of data which is such that significant work would be required to manually enter the data to the HR Desktop system, please contact your InterRetire representative who will be able to help you with this.

1.2 Population by Human Resources

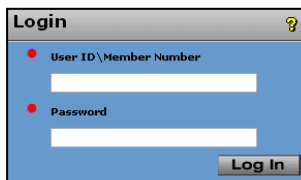
It is quite possible for the Human Resources Department to populate the employee records manually. InterRetire would set up a Blank database with only the basic entity level information such as contribution rates and funds to invest in. The HR department could then follow the procedure to manually create new employees in the system.



2 Starting Off

2.1 Starting the Program

The first time you log into this site you will need to download ICA Web Client 32 bit for Windows. This can be downloaded by clicking the link on the right hand side of the screen under the Message Centre heading. If you are running this program on a network, please check with your IT department regarding the download of software. If your company has a firewall, please ensure that the firewall is configured to allow communication through port 1494.




Please log in

To log in to the Pensions System, enter your credentials and click Log In.

If you do not know your login information, please contact your help desk or system administrator.

Message Center

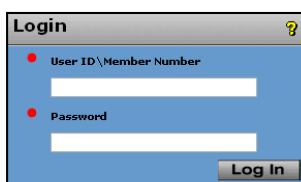
The Message Center displays any informational or error messages that may occur.

 You do not have the Citrix client installed on your system - Please click on the link below and choose 'Run'

[ICA Web Client for 32-bit Windows](#)

2.2 Logging In

Once you get on the website, you will see the following screen. Enter the user ID and password provided by your InterRetire representative.



Please log in

To log in to the Pensions System, enter your credentials and click Log In.

If you do not know your login information, please contact your help desk or system administrator.

Message Center

The Message Center displays any informational or error messages that may occur.

If you have lost or forgotten your password, please contact InterRetire.

Note: If you are using Internet Explorer 7, the login may fail. In this event please go to: Tools, Internet Options, Security, Internet then Custom Level on the menu bar of your system. You should locate an option called 'Automatic Prompting for File Downloads'. This needs to be changed to 'Enable'. If you continue to experience problems, please contact InterRetire.



Once you have logged onto the website, The Select Plan password screen will appear. Please enter the password provided to you by InterRetire. If you have lost or forgotten your password, please contact InterRetire.



2.3 Selecting a Plan

When you have logged in, you will be able to see all of the plans which are available to you to amend or view. The access to the different plans is controlled by InterRetire for security purposes. If you do not have access where you expect it, please contact us.

You are able to sort the plans by name or by Plan Number. To do this, simply click on the heading you want to sort by.

When you have found the appropriate plan, either double click on it or highlight it and click open to access the information for that Plan.

You are also able to perform a global search for an employee across all of your plans from this screen. To do this click on the Search for Employee box at the top of the screen.



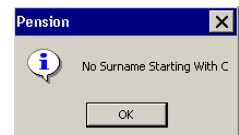
know any more specific search criteria, simply click on the header and the table will sort for you.

3.3 Browse by Surname

From the main screen, click on the box next to "All Employees in Surname Order". This will take you to the first person in the plan alphabetically. You can browse to the first person with a surname starting with any letter by clicking on the relevant letter, "A" in the example here.

The screenshot shows the 'Member Info' form for a member named Mr C Anderson. The form includes fields for Mailing Name, Address, Country, Post Code, Work Telephone No., Home Telephone No., Mobile No., Fax No., E-Mail, Place of Birth, Date of Birth, Date of Death, Web Access Password, and Web Access Number. There are also sections for 'Passport Details' and 'ID Details'. The search bar at the top shows 'All Employees in Surname Order' checked, and the letter 'A' is highlighted in the alphabetical search bar.

Should the plan you are looking at not have anyone with a surname starting with the letter you choose, a message will appear telling you there are no records starting with that letter.





4 Create an Employee Record

4.1 New Employee

When you click the “new” button on the main screen, you will get a screen like this. Enter the Forename and Surname of the new member and click on the continue button. Please ignore the Investment Bias box unless its relevant to your plan. Follow through the rest of the screens to complete the member’s details.

Is This Employee Going to Be Used as a Template?

Employee Forename

Employee Surname

Investment Bias

4.2 Member Information

This is the screen where the general contact information about a member is stored. This is the default screen when you go into a member's records. Type into the boxes and select data from the drop down lists.



Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments												
Mailing Name <input type="text" value="Mr W Brown"/>		Address <input type="text" value="828 Bath Road"/> <input type="text" value="Bristol"/>		Category <input type="text"/>		<input type="text"/>													
Country <input type="text" value="United Kingdom"/>		Post Code <input type="text" value="BS4 5LQ"/>		Policy Number <input type="text"/>		<input type="text"/>													
Work Telephone No. <input type="text" value="0117 9719292"/>		Home Telephone No. <input type="text"/>		Pay Roll No. <input type="text"/>		Tax Number <input type="text"/>													
Mobile No. <input type="text"/>		Fax No. <input type="text"/>		<div style="border: 1px solid black; padding: 5px;"> <table border="1"> <thead> <tr> <th>Passport Details</th> <th>ID Details</th> </tr> </thead> <tbody> <tr> <td colspan="2"> Passport No. <input type="text"/> </td> </tr> <tr> <td colspan="2"> Place of Issue <input type="text"/> </td> </tr> <tr> <td colspan="2"> Date of Issue <input type="text"/> </td> </tr> <tr> <td colspan="2"> Expiry Date <input type="text"/> </td> </tr> <tr> <td colspan="2"> Last Verification <input type="text"/> </td> </tr> </tbody> </table> </div>				Passport Details	ID Details	Passport No. <input type="text"/>		Place of Issue <input type="text"/>		Date of Issue <input type="text"/>		Expiry Date <input type="text"/>		Last Verification <input type="text"/>	
Passport Details	ID Details																		
Passport No. <input type="text"/>																			
Place of Issue <input type="text"/>																			
Date of Issue <input type="text"/>																			
Expiry Date <input type="text"/>																			
Last Verification <input type="text"/>																			
E-Mail <input type="text"/>		Place of Birth <input type="text" value="Germany"/>																	
Date of Birth <input type="text" value="05/04/1986"/>		Date of Death <input type="text"/>																	
Web Access Password <input type="text" value="6L9224V716"/>		Web Access Number - 22415																	

The Web Access Number and Web Access Password are automatically generated when a new employee is created. These details will enable the user to log into their personal pension website.

There is a section to record passport or identity details should you need to keep this sort of due diligence information. Select ID Details which is located next to Passport Details.

Passport Details	ID Details
ID Number <input type="text"/>	
Place of Issue <input type="text"/>	
Date of Issue <input type="text"/>	
Expiry Date <input type="text"/>	
Last Verification <input type="text"/>	



4.3 Member Information 2

This screen is an overspill from the Member Information screen and includes several further options.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments
-------------	--------------------------	----------------	--------------------	--------------------	--------------	-------------------	-------------

Nationality	<input type="text" value="US American"/>
Domicile	<input type="text" value="United Kingdom"/>
Investment Bias	<input type="text"/>
Marital Status	<input type="text" value="Married"/>

Send Correspondence To



4.4 Dependent Information

The dependent information screen allows you to record all of the relevant data about the members' dependents in the event that you may need to contact them.


You are able to record the entire range of standard due diligence information as well as how the member wanted their fund to be distributed and in which proportions should they die.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments																					
<table border="1"> <thead> <tr> <th>Dependents</th> <th>Title</th> <th>Forename</th> <th>Surname</th> <th>Relationship</th> <th>Percentage</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>Mrs</td> <td>Doris</td> <td>Brown</td> <td>Wife</td> <td>100</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								Dependents	Title	Forename	Surname	Relationship	Percentage			Mrs	Doris	Brown	Wife	100								
Dependents	Title	Forename	Surname	Relationship	Percentage																							
	Mrs	Doris	Brown	Wife	100																							
Address: <input type="text" value="828 Bath Road Bristol"/>		Nationality: <input type="text" value="US American"/>		Domicile: <input type="text" value="United Kingdom"/>																								
Country: <input type="text" value="United Kingdom"/>		Post Code: <input type="text" value="BS4 5LQ"/>		Address as Member Info: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No																								
Telephone No. <input type="text"/>		Telephone No. <input type="text"/>		Passport Details		ID Details																						
Mobile No. <input type="text"/>		Fax No. <input type="text"/>		Passport No. <input type="text"/>		Place of Issue <input type="text"/>																						
E-Mail <input type="text"/>		Date of Birth <input type="text"/>		Date of Issue <input type="text"/>		Date of Issue <input type="text"/>																						
Date of Birth <input type="text"/>		Date of Death <input type="text"/>		Expiry Date <input type="text"/>		Expiry Date <input type="text"/>																						
				Last Verification <input type="text"/>		Last Verification <input type="text"/>																						



4.5 Bank Transfer Information

This screen is used for recording payment information in relation to pensions in payment. The comments box (highlighted) can be used if any oddities need to be recorded. See indicated, this is a notes box which you can use to input a large amount of text for any purpose.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments
Bank Name		Royal Bank of Scotland International Limited		Account Number			
Address		PO Box 62 Royal Bank Place 1 Gategry Esplanade St. Peter Port		Account Name			
Country		Guernsey		Reference			
Post Code		GY1 4BQ		Pay Method			
Swift Code				Monthly Pension		0.00	
Branch Code				Customer to sending bank instructions 1			
Telex Code				Customer to sending bank instructions 2			



4.6 Correspondent Information

This screen is used in relation with the Bank transfer Information page. It can be used to record the correspondent bank details when making pensions in payment to non-local currency.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments
<p>Bank Name <input type="text"/></p> <p>Address <input type="text"/></p> <p>Post Code <input type="text"/></p> <p>Swift Code <input type="text"/></p> <p>Branch Code <input type="text"/></p> <p>Telex Code <input type="text"/></p> <p>Account Number <input type="text"/></p> <p>Account Name <input type="text"/></p> <p>Reference <input type="text"/></p>							



4.7 Service Information

This is a useful screen for the HR department. It can be used to store a variety of information about the member and their service with the company. It also has fields for recording when a member booklet was sent to the member so a record can be kept as to how up to date the plan information the member holds is. You should record the date a member joins the scheme and when they leave.

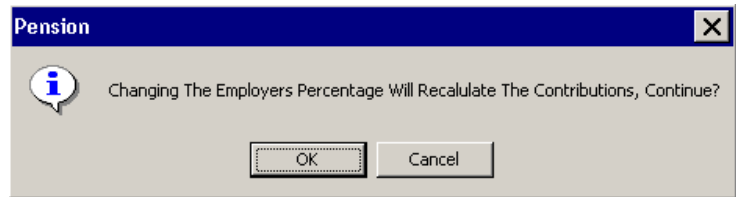
Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments												
Date Joined Scheme	<input type="text" value="20/07/2007"/>				Reduction Factor for Early Retirement	<input type="text"/>													
Date Left Scheme	<input type="text"/>				Type of Pension Payment	<input type="text"/>													
Date Rejoined Scheme	<input type="text"/>				Actuarial Confirmation Received	<input type="text"/>													
Normal Retirement Date	<input type="text"/>				Pension Payment Commenced	<input type="text"/>													
Date Retired	<input type="text"/>				Current Pension Payment per Month	<input type="text" value="0.00"/>													
Date of Death	<input type="text"/>				Pension Payment Ceases/Ceased	<input type="text"/>													
Credited Service Years	<input type="text"/> - <input type="text"/> +	Months	<input type="text"/> - <input type="text"/> +		Accounts Sent	<input type="text"/>													
Pension Option Chosen	<input type="text"/>				Booklet Sent	<input type="text"/>													
Notes	<input type="text"/>				Form Received	<input type="text"/>													
				Service Details <table border="1"> <thead> <tr> <th></th> <th>Rank</th> <th>From</th> <th>To</th> </tr> </thead> <tbody> <tr> <td>*</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>					Rank	From	To	*							
	Rank	From	To																
*																			



4.8 Remuneration Information

This screen calculate and records the pension contribution for the member. Contributions are based on a percentage of Salary. The system will calculate the Contribution level. If the Salary is input and the contribution level has also been input on the Change / Create Group Level Information screens.

Changing the Salary will recalculate the Contributions where either an Employer or Employee contribution percentage exists. You will get a warning that the contributions are being re-calculated.



The employer and employee contribution rates are controlled at entity level by InterRetire through the update investments screen but it is possible to overwrite the contribution rate on an individual basis if, for example, you have agreed a higher rate with a new employee and it is within the rules of the plan.

If required the amount of contribution can be amended after the system calculates it for you, simply select the box and type over the automatic calculation.

There is a large notes section at the bottom of the screen which allows you to record any history which you need.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments
-------------	-------------------	----------------	--------------------	--------------------	--------------	--------------------------	-------------

Defined Contribution Remuneration Details

<table> <tr> <td>Salary Paid</td> <td><input type="text" value="12000.00"/></td> </tr> <tr> <td>Employers Contribution %</td> <td><input type="text" value="9.00"/></td> </tr> <tr> <td>Employees Contribution %</td> <td><input type="text" value="5.00"/></td> </tr> </table>	Salary Paid	<input type="text" value="12000.00"/>	Employers Contribution %	<input type="text" value="9.00"/>	Employees Contribution %	<input type="text" value="5.00"/>	<table> <tr> <td colspan="2">Payment Details for the Period</td> </tr> <tr> <td>Employer Contributions</td> <td><input type="text" value="British Pounds"/> <input type="text" value="90.00"/></td> </tr> <tr> <td>Member Contributions</td> <td><input type="text" value="British Pounds"/> <input type="text" value="50.00"/></td> </tr> <tr> <td colspan="2" style="text-align: right;">Total Contribution <input type="text" value="140.00"/></td> </tr> </table>	Payment Details for the Period		Employer Contributions	<input type="text" value="British Pounds"/> <input type="text" value="90.00"/>	Member Contributions	<input type="text" value="British Pounds"/> <input type="text" value="50.00"/>	Total Contribution <input type="text" value="140.00"/>	
Salary Paid	<input type="text" value="12000.00"/>														
Employers Contribution %	<input type="text" value="9.00"/>														
Employees Contribution %	<input type="text" value="5.00"/>														
Payment Details for the Period															
Employer Contributions	<input type="text" value="British Pounds"/> <input type="text" value="90.00"/>														
Member Contributions	<input type="text" value="British Pounds"/> <input type="text" value="50.00"/>														
Total Contribution <input type="text" value="140.00"/>															

Notes

Salary changed in February from £10,000 to £12,000

Employers contribution changed up to 9% in May

To stop contributions for a leaver, simply remove the salary from the salary Paid field and the system will recalculate the contributions to zero. If a break in contributions is only for a limited time, then you may type over the contribution amount with a zero.



4.9 Investments

The investments screen is used to record the individual's investment choices in a Defined Contribution (DC or Money Purchase) scheme. This screen is not used for a Defined Benefit (DB or final salary) scheme.

Member Info	Member Info No. 2	Dependent Info	Bank Transfer Info	Correspondent Info	Service Info	Remuneration Info	Investments
Reporting Currency: British Pounds							
Code	Plan	Employee %	Employer %				
▶ 2241001	SISF UK Equity Fund	50	0				
2241002	Schroders Managed Wealth Portfolio	0	0				
2241003	Schroders Gilt & Fixed Interest Fund	20	0				
2241004	SIM (Guernsey) Offshore Cash Fund	0	30				
2241005	Fidelity Wealthbuilder Target Fund 2010	0	0				
2241006	Fidelity Wealthbuilder Target Fund 2015	20	0				
2241007	Fidelity Wealthbuilder Target Fund 2020	0	0				
2241008	Fidelity Wealthbuilder Fund	0	70				
2241009	Barings Extended Risk Strategy Fund	0	0				
2241010	Barings Optimum Risk Strategy Fund	0	0				
2241011	Barings Reduced Risk Strategy Fund	0	0				
		100.00	100.00				

The investments can be changed at a group level on the Change / Create Group Level Information screens. If you need to do this, please contact your InterRetire contact as a change in investment choices may affect your relationship with InterRetire.

4.10 Other functions

Once you have filled out the details for a new member or just amended one detail, you will need to save your change. Clicking on the Save button at the top of the screen will save your work. Once saved the button will be 'greyed out'.



If you wish to cancel the changes then select 'Undo'. You may notice the Word button on plans with the member welcome letter option.



5 Update Employee Records

5.1 Quick Update

The quick update screen can be used when changing information in relation to members' salaries and contributions. Click on 'Maintenance' at the top of the screen and select 'Quick Update'. This screen would most likely be used following an annual review of salaries as it is much faster than going into every record. It can also be used where several members have opted to contribute a different amount to that which the standard percentage allows.

You are able to update the following columns:

- Current Salary
- Employer Contribution
- Employee Contribution

Pension Code	Forename	Surname	Policy Number	Pay Roll Number	Current Salary	Employer %	Employer Contribution	Employee %	Employee Contribution
▶ 11	Christopher	Anderson			24,000.00	8.00	15,660.00	5.00	4,600.00
5	William	Brown			12,000.00	8.00	80.00	5.00	50.00
6	David	Davis			30,000.00	8.00	200.00	5.00	125.00
2	John	Johnson			20,000.00	8.00	133.33	5.00	83.33
4	Michael	Jones			19,000.00	8.00	126.67	5.00	79.17
14	Helier	Le Poidevin			45,000.00	8.00	300.00	5.00	187.50
7	Richard	Miller			50,000.00	8.00	333.33	5.00	208.33
9	Jospeh	Moore			50,000.00	8.00	333.33	5.00	208.33
13	Fred	Smith			0.00	8.00	0.00	0.00	0.00
1	James	Smith			24,000.00	8.00	160.00	5.00	100.00
10	Thomas	Taylor			32,000.00	8.00	213.33	5.00	133.33
12	Daniel	Thomas			60,000.00	8.00	400.00	5.00	250.00
3	Robert	Williams			22,000.00	8.00	146.67	5.00	91.67
8	Charles	Wilson			40,000.00	8.00	266.67	5.00	166.67

5.2 Upload from Excel

The Upload from Excel allows you to upload limited information to the system, including amounts to invest, from an excel spreadsheet, please contact InterRetire should you wish to do this and a standard template can be provided to you.

Enter Excel File Up Upload

To browse and find a file, click on the button to the right of the box. When you have the file name and path showing in the box, click on the 'Process File' button.



5.3 Amend an Individual Record

To amend an individual record, you need to go into the Maintenance Menu and select Amend Pension. This will take you to the main screen where you can either search for an individual member or view all members for the plan in surname order.

For help on locating an employee, please see the Locating an Employee section.

6 Change / Create Group Level Information

6.1 Update Investments

This screen is pre-populated by InterRetire. The following information is stored here.

1. The investment choices available to members of a Plan.

The members investment screens read from this page. If a new investment is added to that which the group is able to invest in, it will be added to this screen. When the changes are saved the system will apply the new investment to all of the individual members' investment pages making it available for selection.

2. Reporting Currency

This is the reporting currency for the Plan as opposed to the individual.

3. Plan Type

This can be set to either defined contribution or defined benefit.

4. Number of contributions per year

The field containing the number of contributions per year is vital. It is used in the calculation of the investment amount per individual when the system is used for regular payments. For example if a Plan contributes quarterly, the field should be set to "4" and the system will calculate the amount to invest for the member as salary x contribution percentage / number of contributions per year.

- 5 Grantee and Agent fields

These fields can be used should it need to be recorded any agents who may need rewarding for referral of business. They can also be used when it comes to reporting.

6.2 Update Extra Information - Table Maintenance

This screen will be pre-populated for you by InterRetire staff and does not need to be changed.



It stores information such as contribution levels for staff where a standard level exists. It can also deal with variable contribution levels where they may vary by age.

The detail of the bank account which is used to transfer contributions into is also stored here. This is used in the contribution report.

7 Contribution Runs

7.1 Running the Contribution report

To run the contributions report, simply go to the reports menu.

Ensure that "Contributions" is highlighted and select the date for which the contributions should be produced.

Once you have done this, click on the Continue button and a report will be produced showing the amount contributed per individual split between, employee and employer contributions with a total. All individuals are totalled at the end of the report.

This report should be used to check all of the contributions are correct and can be used for sign off by your accounts department when they make the payment. Bank account details are listed on the last page of the report for ease.

The screenshot shows a software interface with a menu on the left and a control panel on the right. The menu items are 'Contributions' (highlighted), 'Maintenance Fee Run', and 'All Records Amended Between Dates'. The control panel, titled 'Send Pension Information', includes a 'Date of Contribution' text box, a 'Sort By Category' checkbox, and a 'Processing Complete' checkbox. A 'Continue' button is located at the bottom of the control panel.

There is also a page which details any individuals who have contributions but have left the employment of the company. This is designed to ensure that ex-employees are noticed and removed from the contribution run if necessary.

If wanted, it is possible to show the report sorted by category, simply tick the box next to "Sort by Category" and the report will run with sub totals for each category. The categories are set at plan level by InterRetire



and can be anything you want but it is more usual to use different departments of your business. The category of each employee can be selected from the Member Information screen.

7.2 Sending the Information

Once you are satisfied that the Contribution date for the period is correct, you need to 'send' this to us. To do this simply follow the same procedure as above but this time tick the box which says "Processing Complete". This will alert InterRetire administrators that your file has been created and is ready to be processed by them.

8 Maintenance Fees

8.1 Preparing a Maintenance Fee Run

To prepare for a Maintenance Fee run, go to File at the top of the screen and select Charge Fees. You will be required to select by category the members you wish to charge fees to.

After you have chosen an option, the following screen will appear. There are two ways to enter the fee into the table.

1. If all members are to be charged the same amount,

Pension Code	Forename	Surname	Policy Number	Pay Roll Number	Maintenance Fee
11	Christopher	Anderson			100.00
5	William	Brown			100.00
6	David	Davis			100.00
2	John	Johnson			100.00
4	Michael	Jones			100.00
14	Helier	Le Poidevin			100.00
7	Richard	Miller			100.00
9	Jospeh	Moore			100.00
13	Fred	Smith			100.00
1	James	Smith			100.00
10	Thomas	Taylor			100.00
12	Daniel	Thomas			100.00
3	Robert	Williams			100.00
8	Charles	Wilson			100.00



you can input that figure in the Amount box and click on Apply Charges to give all members the same figure.

2. If the charge to members varies you should input the amounts manually in the box headed up Maintenance Fee. To save simply close the window down.

		Pension Status	Active	Amount	0	Apply Charge
Pension Code	Forename	Surname	Policy Number	Pay Roll Number	Maintenance Fee	
11	Christopher	Anderson			0.00	
5	William	Brown			0.00	
6	David	Davis			0.00	
2	John	Johnson			50.00	
4	Michael	Jones			0.00	
14	Helier	Le Poidevin			0.00	
7	Richard	Miller			0.00	
9	Jospeh	Moore			0.00	
13	Fred	Smith			50.00	
1	James	Smith			0.00	
10	Thomas	Taylor			0.00	
12	Daniel	Thomas			0.00	
3	Robert	Williams			50.00	
8	Charles	Wilson			0.00	

8.2 Running the Maintenance Fee report

To run the maintenance report, simply go to the Reports menu.

Ensure that "Maintenance Fee Run" is highlighted and select the date for which the fee run should be produced.

Once you have done this, click on the Continue button and a report will be produced showing the fees per member.



8.3 Sending the Information

When you come to send the information to InterRetire, Simply follow the same procedure as above but this time tick the box which says "Processing Complete". This will alert InterRetire administrators that your file has been created and is ready to be processed by them.

9 Reporting

9.1 The Audit Trail

The Audit Report function is designed to keep a log of all of the actions taken by any user when they are updating the records on the HR Desktop system.

You are able to select a date range for any changes to be shown and which individual made the changes. For example, if a temporary member of staff has been updating some records for you, it is possible to go in and check what was done.



It is also possible to choose which table of information in particular has had changes made to it. The choices in the drop down box and their explanations are shown below:

Pension Contacts shows you information about the member such as address or salary details.

Pension Contact Plans shows you information about the fund selections made by members and any changes to these.


Pension Dependents shows you information about changes to an individual's dependent information

Pension Service Details gives you information about any changes to an individual's service history.

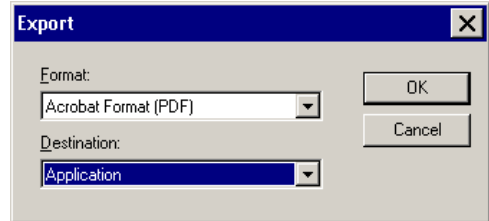
If you are running more than one plan, you can run the Audit Report for all of your clients at the same time rather than having to go into each entity by ticking the report on All Plans tick box.



9.2 Exporting Reports

All reports are created using Crystal Reports. It is possible to export all reports to a number of different formats (listed below) by clicking on the export button  at the top of the Crystal Report Window.

You will get a window like this:



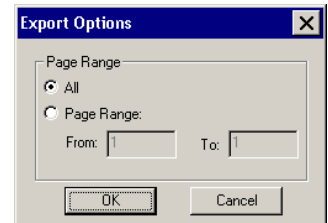
First you need to choose the format you would like to export into.

Next, choose the Destination. There are two main destinations that you will use; Application and Disk File.

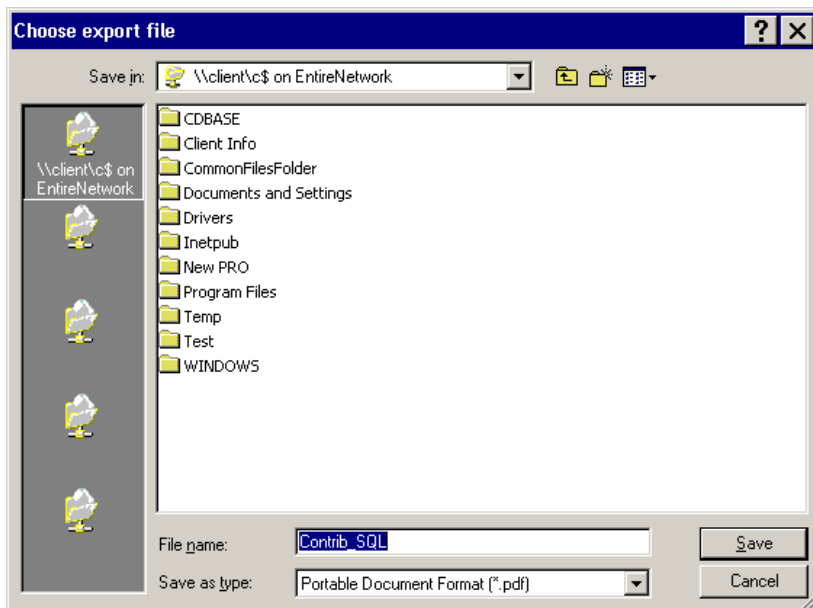
If you choose application, this will load the report on screen in the format you have chosen. For example, if you choose Acrobat Format (PDF) and Application (as above), this will open Adobe Acrobat and then load the report in Acrobat.

If you choose disc file, this will save the report to the location you specify in the format you chose in the first step.

You will then be asked about whether you want to export all pages of the report or a selection of them:



If you chose disk file, you will then be presented with the following:





You can only save to your C: drive when working via the https system. To view your C: drive click on the



button.

Similarly, if you export a report to say pdf format via the export to application function, you can save only to your C: drive following the method above.

10 Support

10.1 Disclaimer

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