Instructions for getting saved SSG files and other resource documents from their source to BIVIO files

1. Toolkit 6 Stock Selection Guide (SSG) documents
Create or update a complete SSG

Click on ***File***
Click on ***Save company as***
Type in company name and current date…click ***OK***
1A. ITK version
 Click on ***File***…Click on ***Export data***…Click on ***save as names***…highlight your file
 In popup box click on **add** (this should transfer your file from the left list to the right list)
 Export format box in the popup should be Toolkit 6 .ITK…click on ***OK***
 New popup box should be list of folders from your computer
 Select export destination folder
 Click on ***OK***
1B. PDF version (to view from a computer that does not have Toolkit software)
 Need to download Cute PDF (free software at CutePDF.com) to your computer
 Prior to saving file from Toolkit:
 Click on **Start**
 Click on **Printers and Faxes**
 Right-Click on CutePDF printer Icon
 Click on **set as default printer**
 Close window and go back to Toolkit completed SSG screen
 Click on **File**
 Click on **Print**
 In popup box click on forms you want in your file
 Click **OK**
 In popup box select export destination folder in your computer
 Change your file name to Company name, PDF and current date…click **OK**

1. BIVIO
Login with your user name or email and Password to get to MICNOVA
Click on **Communications**…Click on **Files**…Click on **Public**
Click on **Club Portfolio** to open list of stocks
Click on the name of your stock folder to open folders
 A. Current SSG – Both ITK and PDF
 Click to open contents…If old versions are present, click on **Modify** button at end of the line
 In popup box, click on **Delete**…click **OK**…repeat for all old versions
 Go back to Current SSG line and click on **Modify** button at end of the line
 Click on **file to upload**
 In popup box, browse to folder where you saved ITK and PDF SSGs
 Highlight one at a time…Click on **new file**…Click **OK**…Repeat for 2nd SSG file
 B. Research Reports – Quarterly Report,Value Line, Morningstar, Standard and Poors, etc
 Delete old versions as above
 Add new versions as above
2. Better Investing On-Line SSG
 Complete SSG
 Click on **Files**…
 Click on **Save As**…
 Type in Company Name, BISSG, current date
 Click on **Files** (once more)…
 Click on **Email Study** – SSG Report, PDF Format and send to your personal email account (i.e.
 john.doe@gmail.com)
In another window, Open your personal email and open the email sent from Better Investing
 Find the SSG PDF file you created…right click on the file and click on Save as
 In popup box select export destination folder in your computer…Click **OK**
 Go back to your open BIVIO window
 Go back to Current SSG line and click on **Modify** button at end of the line
 Click on **File to Upload**
 In popup box, browse to folder where you saved PDF SSG
 Highlight file…Click on **new file**…Click **OK**
3. Return printer default setting to your usual printer by right click and click on printer choice to make default.