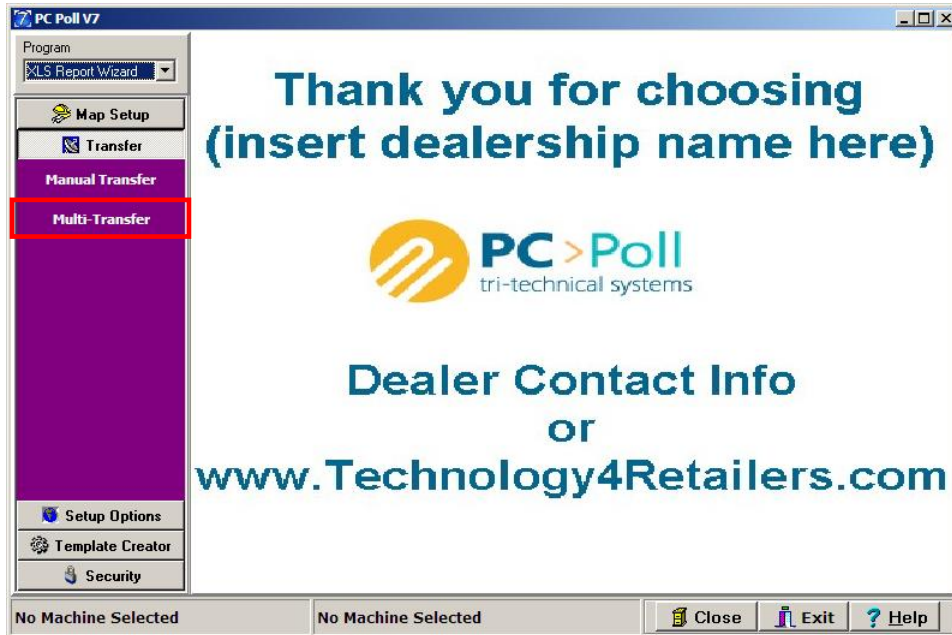
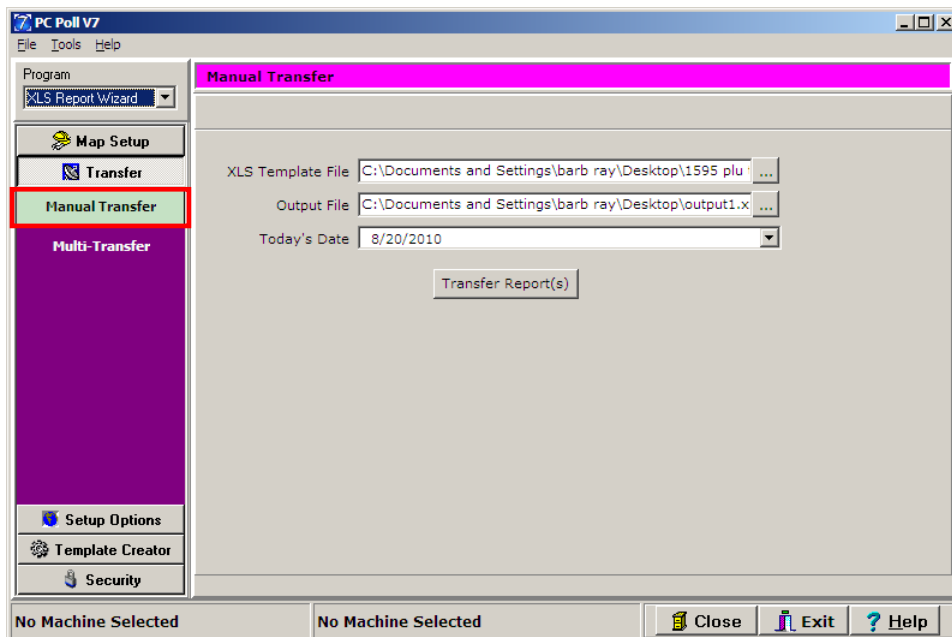


Transfer




There are two ways to do a transfer, manually or as a multi-transfer. Click on the **Transfer** button on the left menu. For information on doing a multi-transfer, see the Help File topic **Multi-Transfer**.

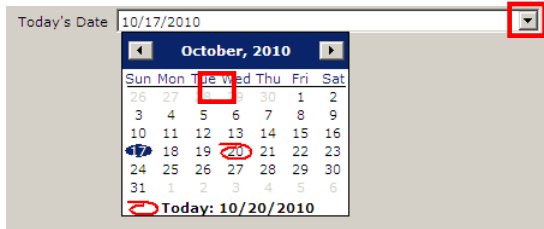
Manual Transfer




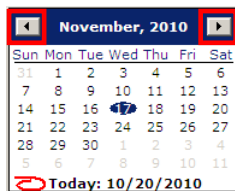
To do a manual transfer to an xls file:



1. To do a manual transfer, click the **Manual Transfer** button on the left menu under **Transfer**.

2. Find a previously created template file for the XLS Template File line. Point the software to the template you just created.
3. Select a location by using the **Browse** button  at the end of the line to browse to the location. Pick a file name for the output file. (A new file anywhere on the PC is acceptable)



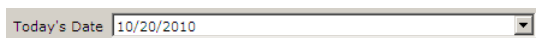
4. Change the **Today's Date** field to match the date of the reports you are transferring in Step 3.
 - a. It can be done by highlighting the current date in the entry box and typing in the correct date.
 - b. Or by clicking on the  button at the end of the **Today's Date** entry box, a calendar appears. Click on the date on the calendar.



- c. The calendar can be advanced or regressed by using the left  arrow to regress the calendar or the right arrow  to advance it.

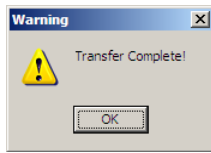


- d. By right clicking on the left or right arrow, a shortcut to today's date opens. Click on **Go to today**.

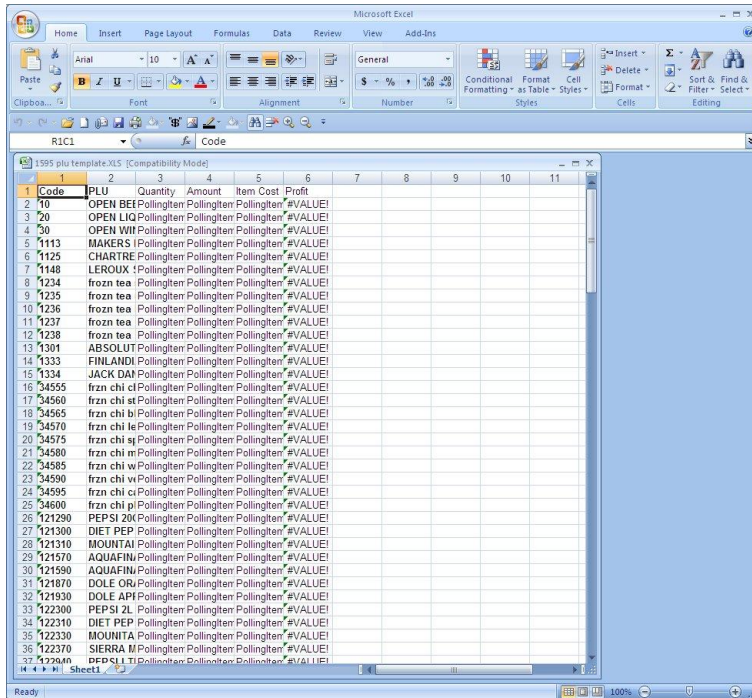


- e. The calendar will close and the current date will appear in the **Today's Date** entry box.

5. Click the **Transfer Reports** button.



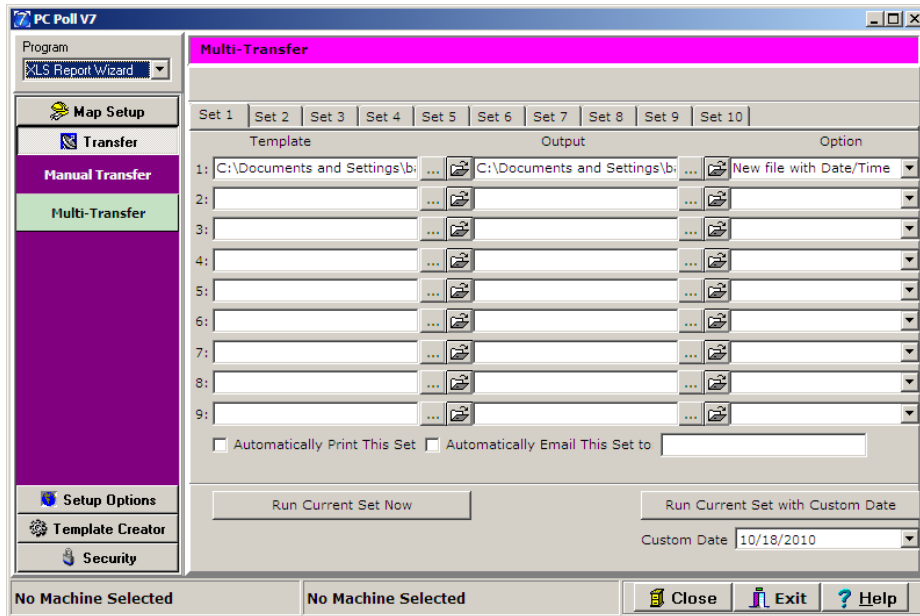
6. A Warning screen will open with the message “Transfer Complete”. Click **OK** to complete the transfer.



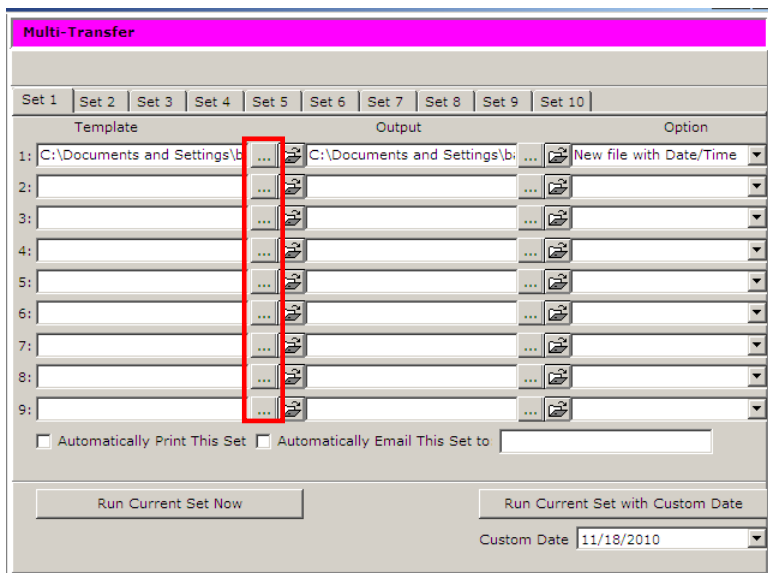
7. The data will transfer and open the new xls file.


For more information on the Transfer function and sample reports, see: **XLS Report Wizard Quick Start**.

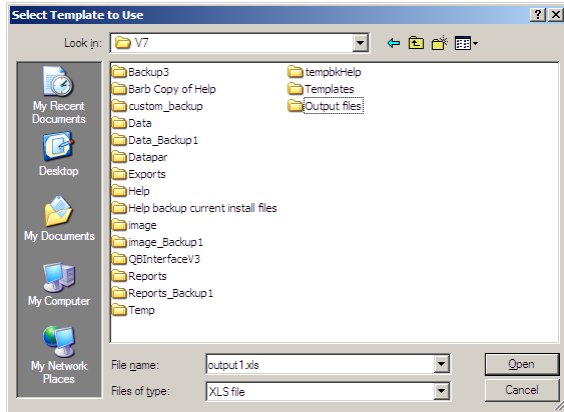
Multi-Transfer



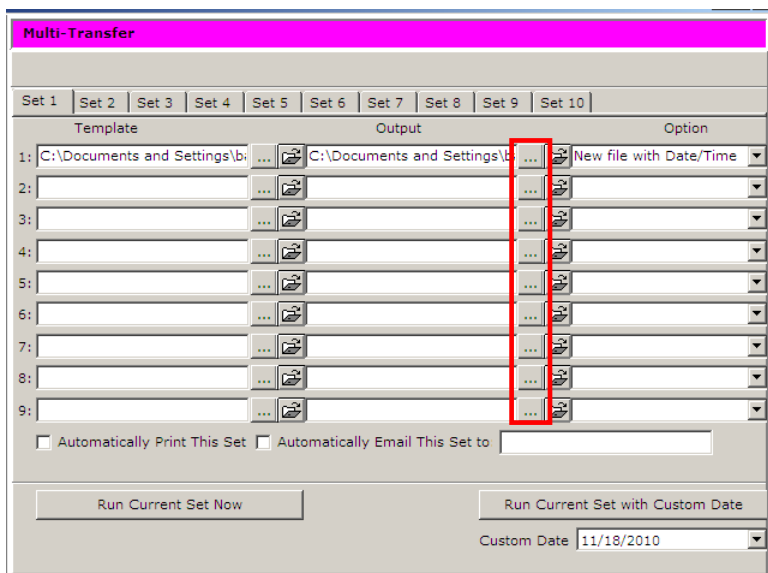
Using the Multi-Transfer option, the user can setup paths and then link the multi-transfer to the calendar via the Polling Schedule area. There are 10 Sets available with 9 templates on each set.



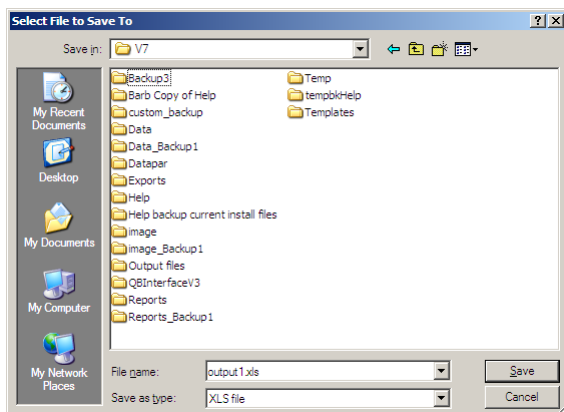
1. Search for the template(s) to use for Templates 1-9 on each tab Set 1 – Set 10 by clicking the **Browse**  button.



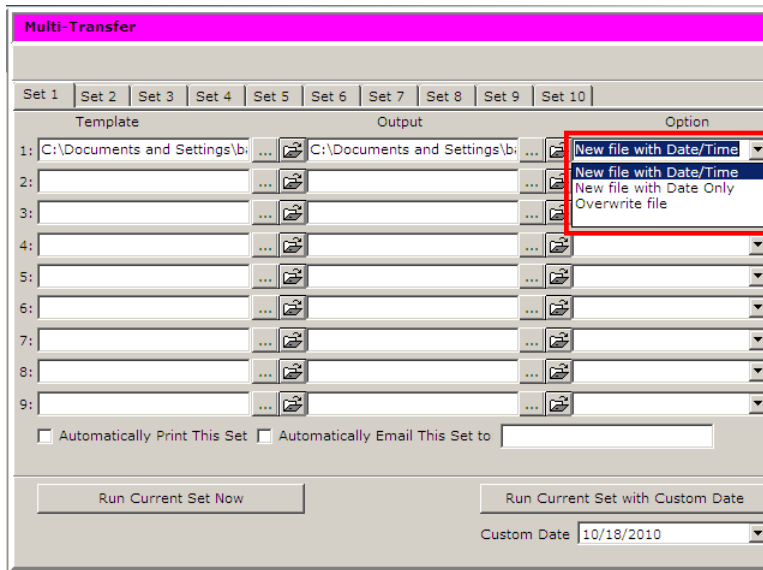
2. A Select Template to Use screen will open. Browse for the template and click **Open**.



3. Select the file to save to using the **Browse**  buttons in the Output section of the screen. .

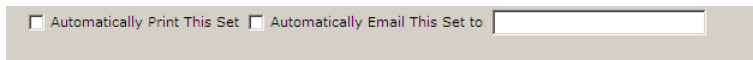


4. A Select File to Save To screen will open. Select the appropriate file and click **Save**.



5. Under the **Option** section of the screen, select one of three options to use for each template: **New file with Date/Time**, **New file with Date Only**, or **Overwrite file**.

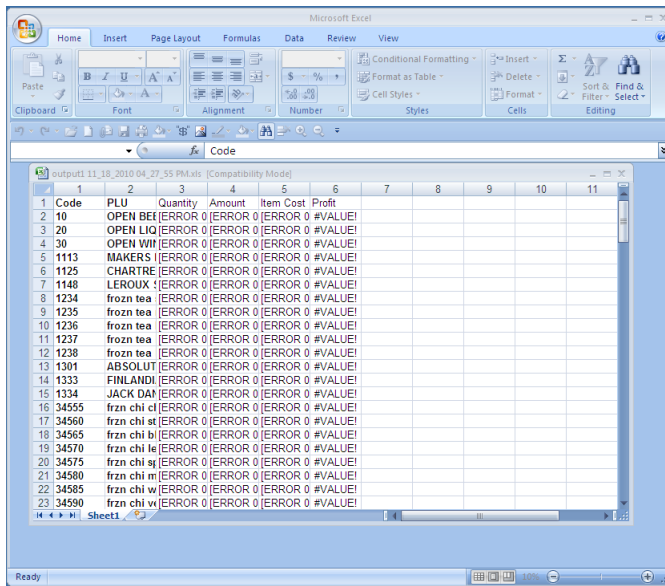
Other Options



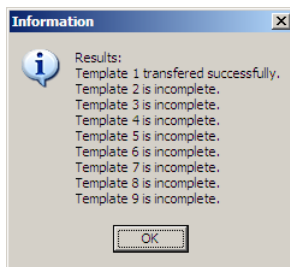
6. Check off **Automatically Print This Set** to automatically print the Set or Sets entered above as soon as the **Run Current Set Now** button is clicked.
7. To send the Set or Sets entered above to an email address, check off **Automatically Email This Set to** and enter an valid email address in the entry box provided.



8. Click the **Run Current Set Now** button near the bottom of the screen to start the process immediately or enter a **Custom Date** and click the **Run Current Set with Custom Date**, which allows the user to pick the date to run the transfer.



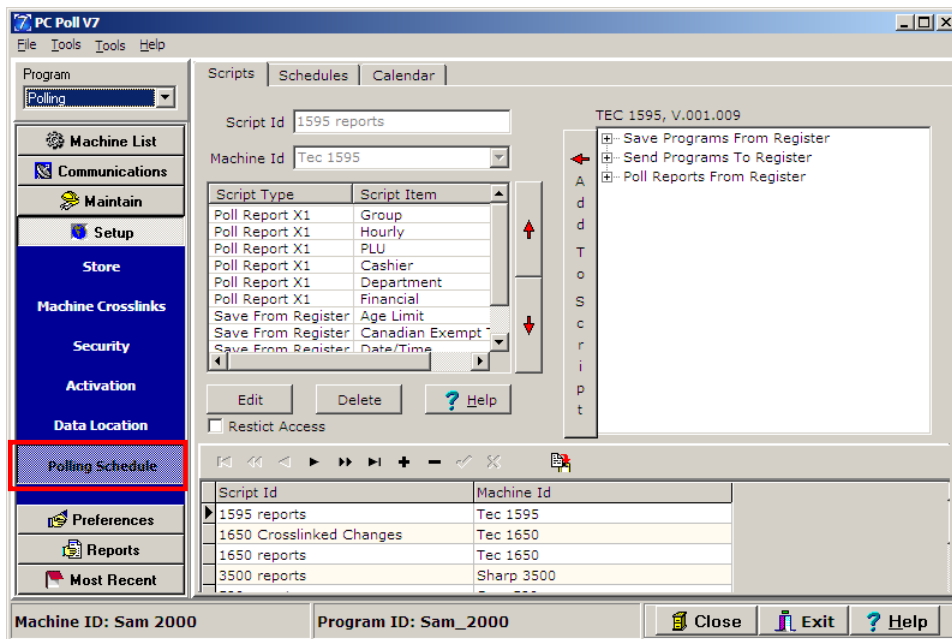
9. After the Set or Sets are run, the xls file will open.



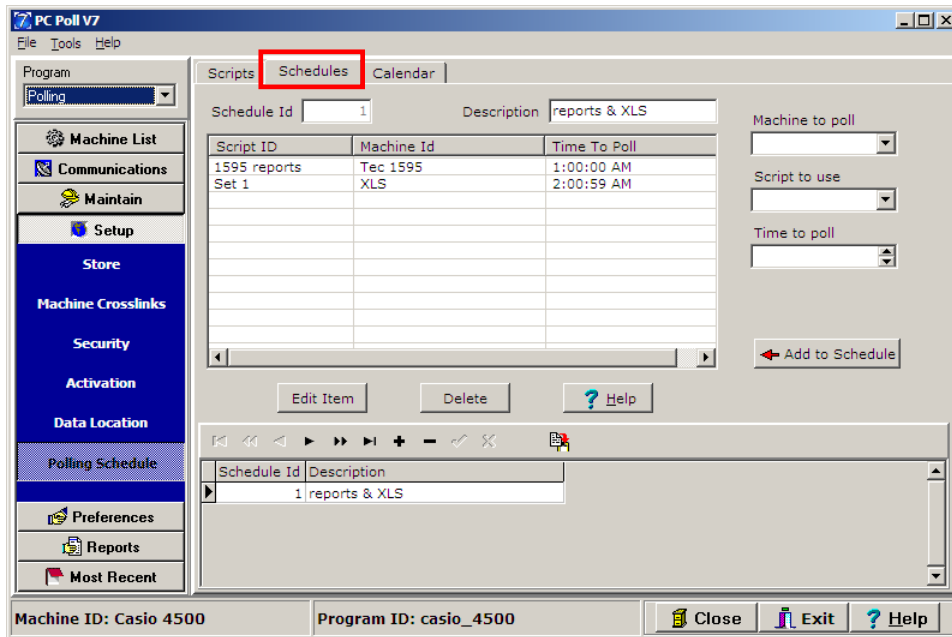
10. When the transfer completes successfully the screen above will open. If there is only one template setup then only that template will show as transferred successfully. Click **Ok** to finish.



11. Go to **Polling** on the Program drop down menu.



12. Click on **Setup** on the menu on the left then click on **Polling Schedule**.



13. Click on the **Schedules** tab. Set up the transfer by entering a **Description**, **Machine to poll**, **Script to use**, and a **Time to poll**. In the example above, the transfer of Set 1 is ready to go at 2:00:59 AM. Be sure to set the transfer time after the reports are polled (1:00:00 AM).
14. Lastly, activate the calendar to run the events automatically.