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.