

Printing Reports in WebPortfolio

Instructions to print reports.

1. Click the **printer icon** in the lower right toolbar.



2. Select **Create a Report**, then click **OK**

What would you like to do?

Create a report
Select an HTML report to view, save or print.

Export to a file
Export some or all of your information to a file. You can then import your information into another application, such as Excel or Quicken.

Ok Cancel

3. Highlight the **report** you want.

Report:

- Net Worth Allocation
- Net Worth Detail**
- Portfolio Holding Appraisal
- Risk & Return

4. Choose either your **Portfolio** or an **Account**.

View details by: Accounts

5. Select the tab **Period** and choose the dates you wish to see.

Data | **Period** | Charts | Sort | Text Size | Printing

Period: Year to date from 1/1/2005 to 4/30/2005

6. Click **View**

View

7. A new browser window will pop-up with your report. You can print as you would normally. Either:

- click the **print** button or
- choose the **file / print**.

