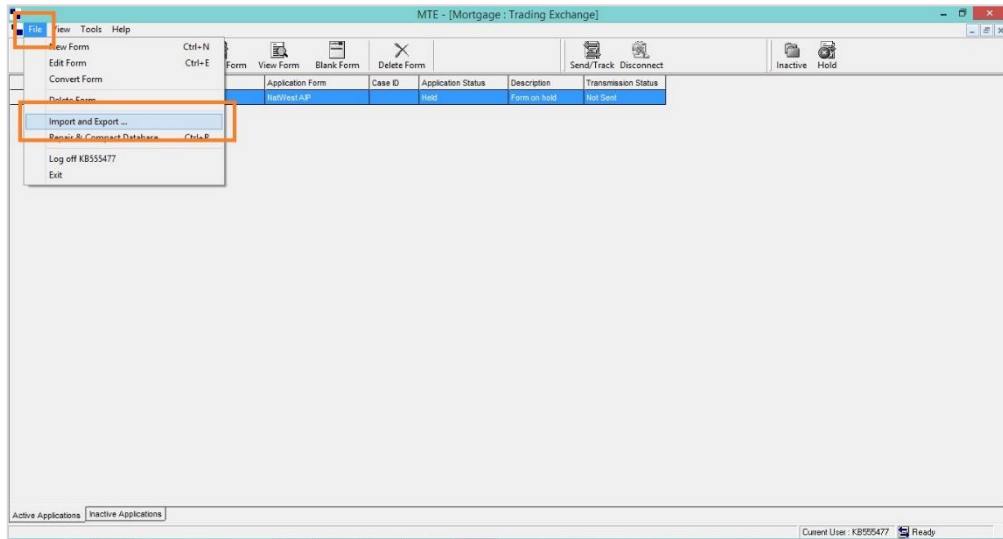


## Import > Export function in MTE

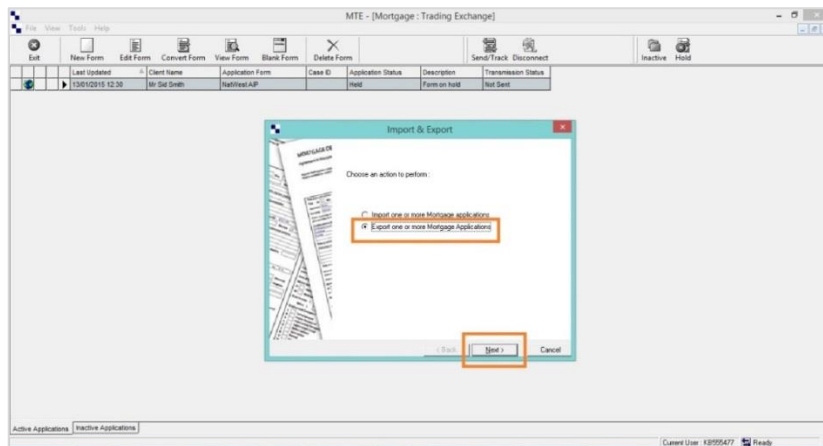
The default installation for MTE is on the PC desktop, which results in all the MTE forms being stored locally on that PC. MTE can also be configured to a local network enabling users to access their cases when moving desks within their office. Currently for non-network installations MTE cases are not accessible if the user accesses MTE on a different PC, like a remote office for example. To assist users who occasionally need to be able to access MTE cases from different PC's we have developed an Import / Export wizard. This enables users to export a case (the exported file is encrypted & client data is secure) & then re-import the case onto a different PC. Please note that another instance of MTE will need to be installed on the PC that the case is being imported to.

### Exporting Cases

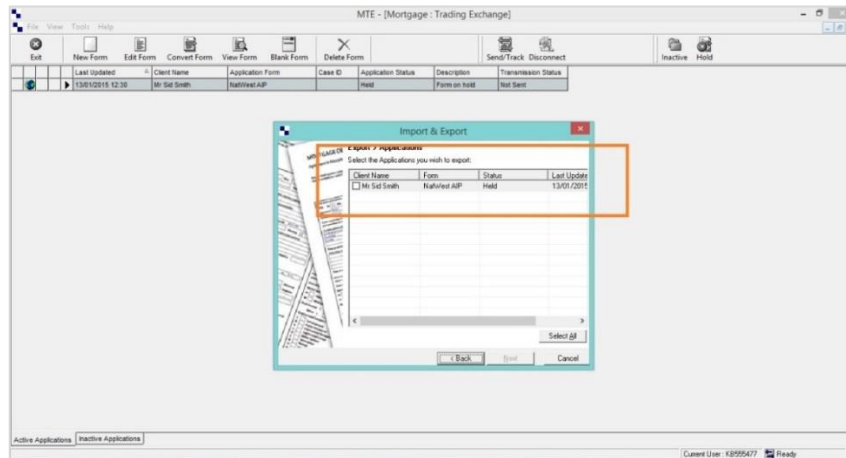
Open up MTE & click File > Import and Export.



Select the Export option & click Next.

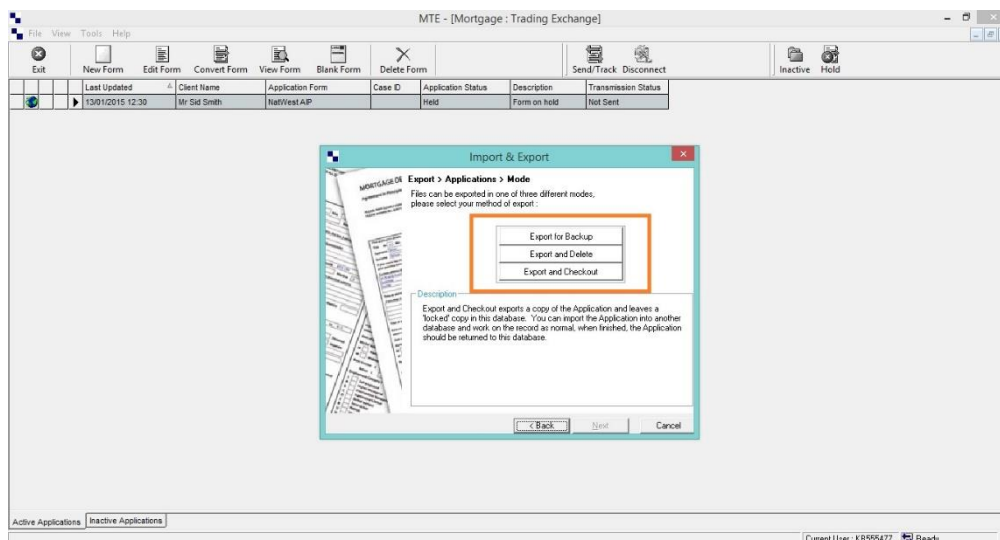


The next screen will give the opportunity to select one or multiple cases to export, once these have been selected click Next.

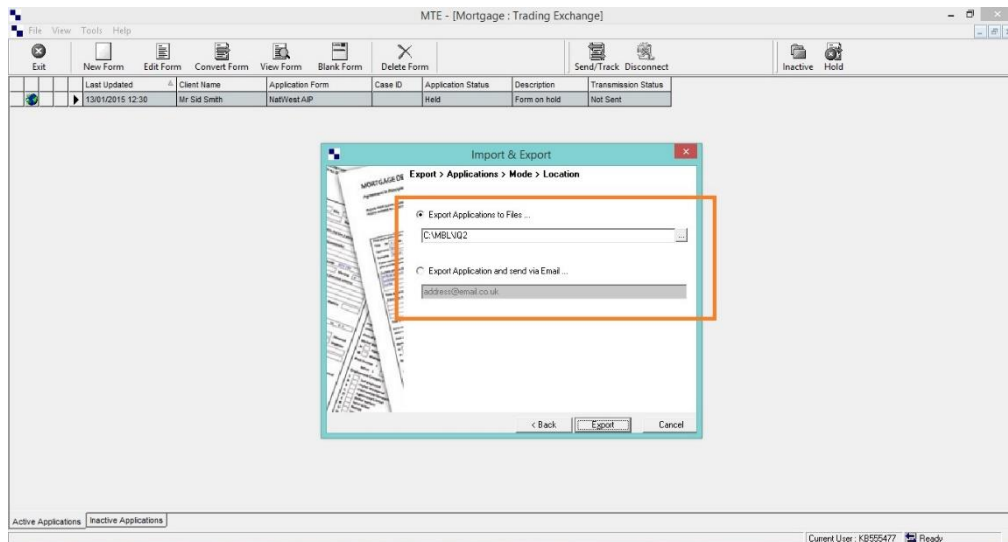


The next screen gives three options for use when exporting cases.

- **Export for Backup** – this option will leave the form in MTE & create a copy which can be restored to a different MTE installation. This needs to be used with caution, particularly if the case is at a “Ready to Send” stage as this means that the case could be potentially sent twice & credit score the client twice. As the name suggests this is best used for backing up MTE cases.
- **Export and Delete** - this option will export the case & delete the copy in MTE. Again this should be used with caution as once deleted from MTE it cannot be retrieved, if the user saved the exported cases to a USB memory stick & loses it, the case will be lost.
- **Export & Checkout** – this option exports the case & leaves a copy in MTE but the MTE copy will be ‘locked’. This means that the case cannot be inadvertently edited, deleted or sent until the case is restored. A user might export the case, take it to a different branch & continue to work on the case then take it back to the original branch. If they lose the exported case then MTE support can restore the ‘locked’ copy.



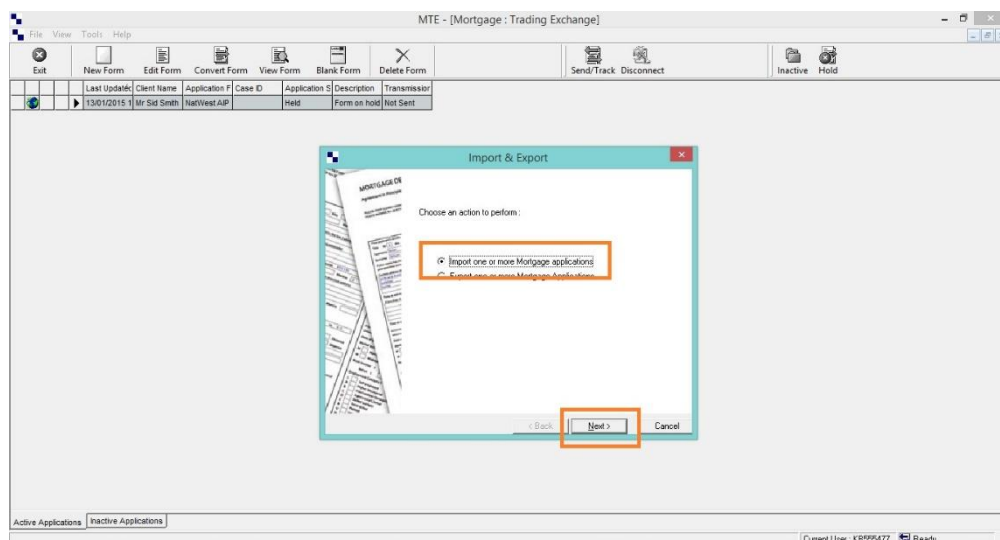
Having selected Export & Checkout, the next screen gives two options for the exported file. The user can save it to a location on their PC, desktop for example. The default location is MBL\IQ2 but a different location can be chose by clicking the highlighted button below. Alternatively they can e-mail the case to a colleague; MTE can integrate with Outlook but this should not be relied on as the exported client file is encrypted & therefore will not be able to be scanned by e-mail virus checkers, quite often this will not be received by the recipient. This will, however, remain in the users sent items in Outlook.

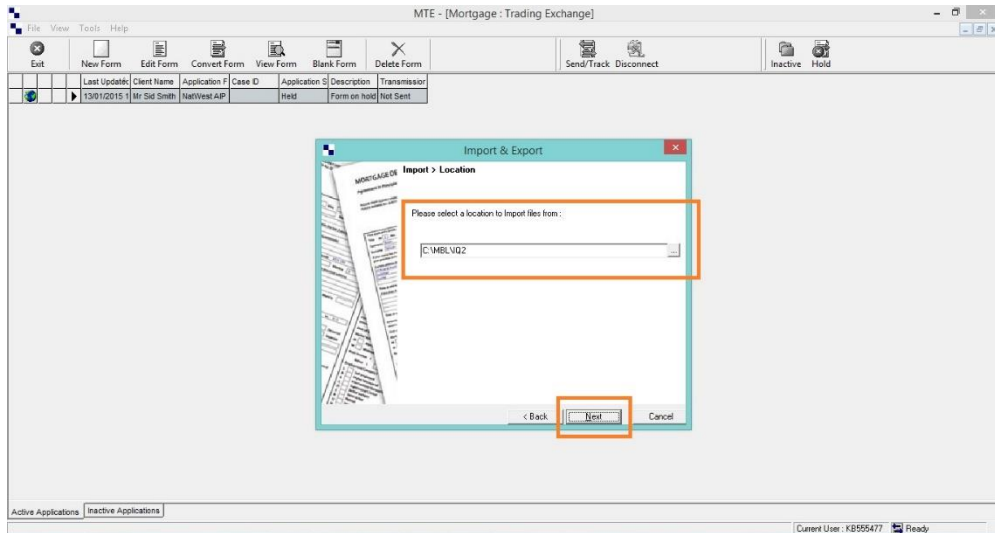


## Importing Cases

Once the user has successfully exported the case & copied it to a USB stick or similar, they can import the case on a new MTE client installation.

Log into MTE & load the Import Wizard using the above procedure but click Import. The screen will require the user to select where the imported case is held. Again they can click the highlighted browse button to select the appropriate location.





Next just select the application from the list & click Import to finish.