

**Startel User's Guide:**  
*Secure Messaging Plus*  
*Website*





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# Startel Secure Messaging Plus Website

This document describes how to use the **Startel Secure Messaging Plus (SM+) Website** to securely exchange messages with other Secure Messaging Plus subscribers.

Topics in the document include:

- ❖ **What is Startel Secure Messaging Plus? — Page 5**
- ❖ **Key SM+ Benefits & Features — Page 6**
- ❖ **Logging into the SM+ Website — Page 8**
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# WHAT IS STARTEL SECURE MESSAGING PLUS?

At the time of this writing, Secure Messaging Plus is supported for Apple handheld devices running iOS 8.0 or higher (iPhone®, iPad®, or iTouch®), and Android™ devices running Android 4.0.3 Ice Cream Sandwich or higher. Android™ 4.1 Jelly Bean or higher is preferable for better performance.

**Startel Secure Messaging Plus (SM+)** is a high-security messaging system that allows subscribers to exchange sensitive information via messages that are encrypted in transit and at rest. Additional features, like *Expiring Messages*, *Password Requirements*, and *Remote Wipe* add extra security to ensure that private messages always remain private.

SM+ messages can be sent or received by logging into the Startel Secure Messaging Plus Website, or by using a qualified Apple® or Android™ device running the Startel Secure Messaging Plus App. (To exchange secure messages between devices, both devices need to have the SM+ App installed.)

This document describes how to use the Secure Messaging Plus Website. If you are using the SM+ App on a handheld device, please request the document that describes device usage.

For more information about key SM+ features and benefits, see "*Key SM+ Benefits & Features*" on [page 6](#).

## *If Your SM+ Account is Associated with a Contact Center*

Secure Messaging Plus can be used independently of a contact center. However, if your account is integrated with such a service, Secure Messaging Plus messages can be exchanged with agents of the service. Exchanging SM+ messages with service agents gives you the benefit of communicating directly and securely with the agents to confirm or request information. You also benefit from being able to "file" messages directly from the SM+ Website.

## KEY SM+ BENEFITS & FEATURES

	FEATURE	BENEFIT
✓	<b>Encrypted Messaging</b>	Messages and attachments are safely encrypted on servers, devices, and in transit.
✓	<b>Group Messaging</b>	Users can define ' <i>Groups</i> ' for group conversations with SM+ subscribers, and ' <i>Distribution Lists</i> ' for broadcasting messages to multiple subscribers who can then respond to the sender only.
✓	<b>Message Forwarding</b>	Messages marked as ' <i>Forwardable</i> ' by the original sender can be forwarded to other SM+ subscribers.
✓	<b>Message Expiration</b>	Senders have the ability to determine when a sent SM+ message expires. Messages can expire when marked by the reader as <i>read</i> or <i>filed</i> , or in a selected number of days. Messages that do not have a defined expiration date will expire within a defined default period (not to exceed 30 days).
✓	<b>Password Protection</b>	Expiring passwords and forced lockouts help protect a user's data and account.
✓	<b>Multiple Device Support</b>	In addition to accessing SM+ via the website, you can register up to 3 qualified devices (smart-phones or tablets) per subscriber.
✓	<b>Multiple Operating System (OS) Support</b>	SM+ is compatible with the latest versions of Android™ and iOS® (iPad®, iPhone®, iTouch®).
✓	<b>Support for Image and Audio Attachments</b>	SM+ messages can include image and audio attachments.
✓	<b>Remote Wipe Capability</b>	If you are using SM+ on a handheld device, and the device is lost or stolen, a Wipe command can be issued from the Web to remotely erase all SM+ App data stored on the device.
✓	<b>Message Status Tracking</b>	Subscribers can track when an SM+ message was sent, viewed, read, and filed.

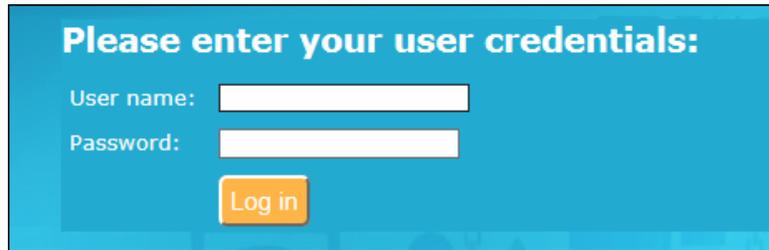
✓	<b>Detailed Reporting</b>	Real-time reports on subscriber usage can be run by both subscribers and SM+ Administrators.
✓	<b>Full Audit Trails</b>	When SM+ is used in conjunction with a Startel CMC system, messages are fully tracked and archived.
✓	<b>Accessibility</b>	SM+ messaging is easily accessible using a Web browser or qualified handheld device running the SM+ App.
✓	<b>Privacy Policy</b>	Startel does not disclose, sell, or distribute users' personal information to any third party.

## LOGGING INTO THE SM+ WEBSITE

Before you can use the Startel Secure Messaging Plus Website, you will need a Secure Messaging Plus **User name** and **Password**.

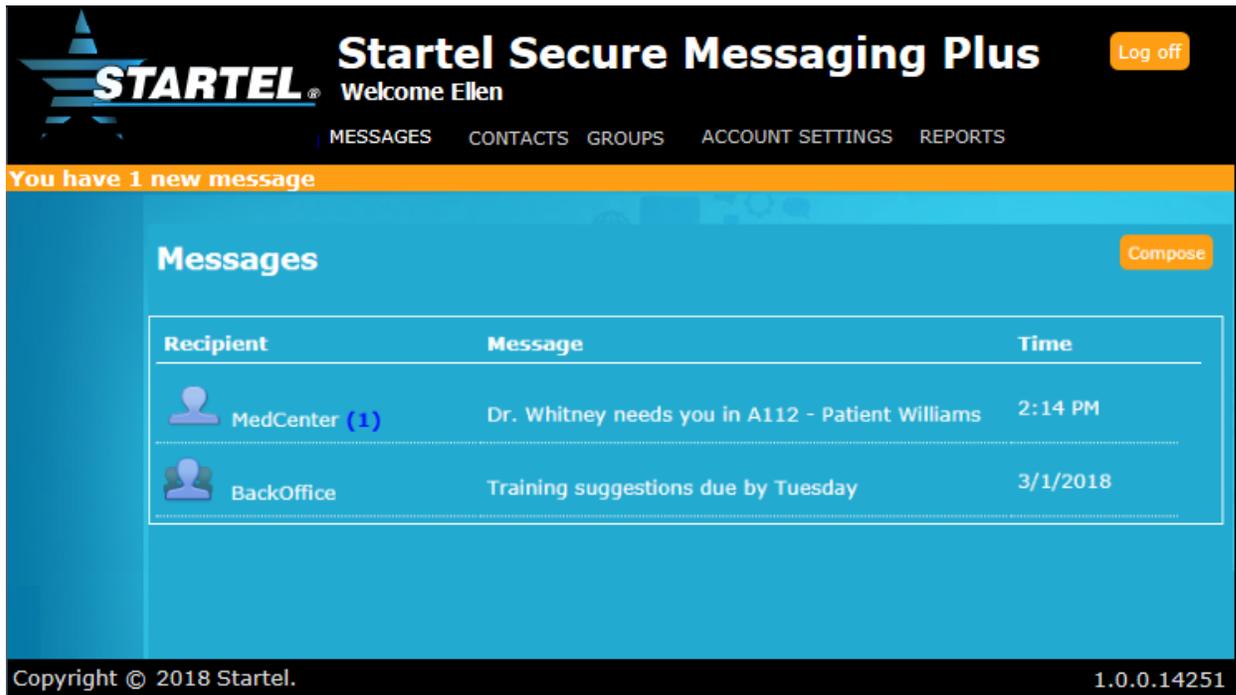
**Follow these steps to log in to the Startel SM+ Website:**

Go to the SM+ Login page using this URL: <https://secureplus.startel.com>



- 1 Enter your SM+ **User Name** and **Password**. (Password is case sensitive.)
- 2 Click .

The website opens to the **Messages** section. In the sample screen, you can see that there is one unread message waiting from MedCenter.



Recipient	Message	Time
 MedCenter (1)	Dr. Whitney needs you in A112 - Patient Williams	2:14 PM
 BackOffice	Training suggestions due by Tuesday	3/1/2018



**NOTE:** Notice the orange “new message” banner at the top of the screen. A banner like this appears if you have one or more new messages waiting.

See [page 9](#) for details on exchanging SM+ messages with other Secure Messaging Plus subscribers.

## EXCHANGING SM+ MESSAGES

Follow these steps to send, read, and manage SM+ messages on the SM+ Website:

**1** Log in to the SM+ Website.

The website opens to the **Messages** section. New messages from a particular subscriber, if any, are indicated by a blue number in parentheses. If a **(1)** is shown, one new message is waiting. If a **(2)** is shown, two new messages are waiting, and so on.

SM+ subscribers with whom you have exchanged messages are listed in the **Recipient** column. In this sample screen, there is one new message waiting from subscriber MedCenter.

**Startel Secure Messaging Plus**  
Welcome Ellen  
MESSAGES CONTACTS GROUPS ACCOUNT SETTINGS REPORTS

You have 1 new message

**Messages** Compose

Recipient	Message	Time
MedCenter <b>(1)</b>	Please call the main office	2:14 PM
BackOffice	Training suggestions due by Tuesday	3/1/2018

Clicking **MedCenter** opens the conversation with MedCenter. The **(1)** tells you that there is one new message from MedCenter.

Click **Compose** to start a new conversation.

**2** Do ONE of the following in this screen:

You can also open an existing conversation from the **Contacts** screen. See [page 17](#) for more information.

- To view a subscriber's new message(s)—or open the existing conversation if there are no new messages from a subscriber—click the subscriber's **name** in the Recipient column. For example, in this screen, you would click **MedCenter** to display a Message Conversation like the one shown on the next page.
- To start a **new** conversation from this screen, click Compose. See [page 14](#) for more information.

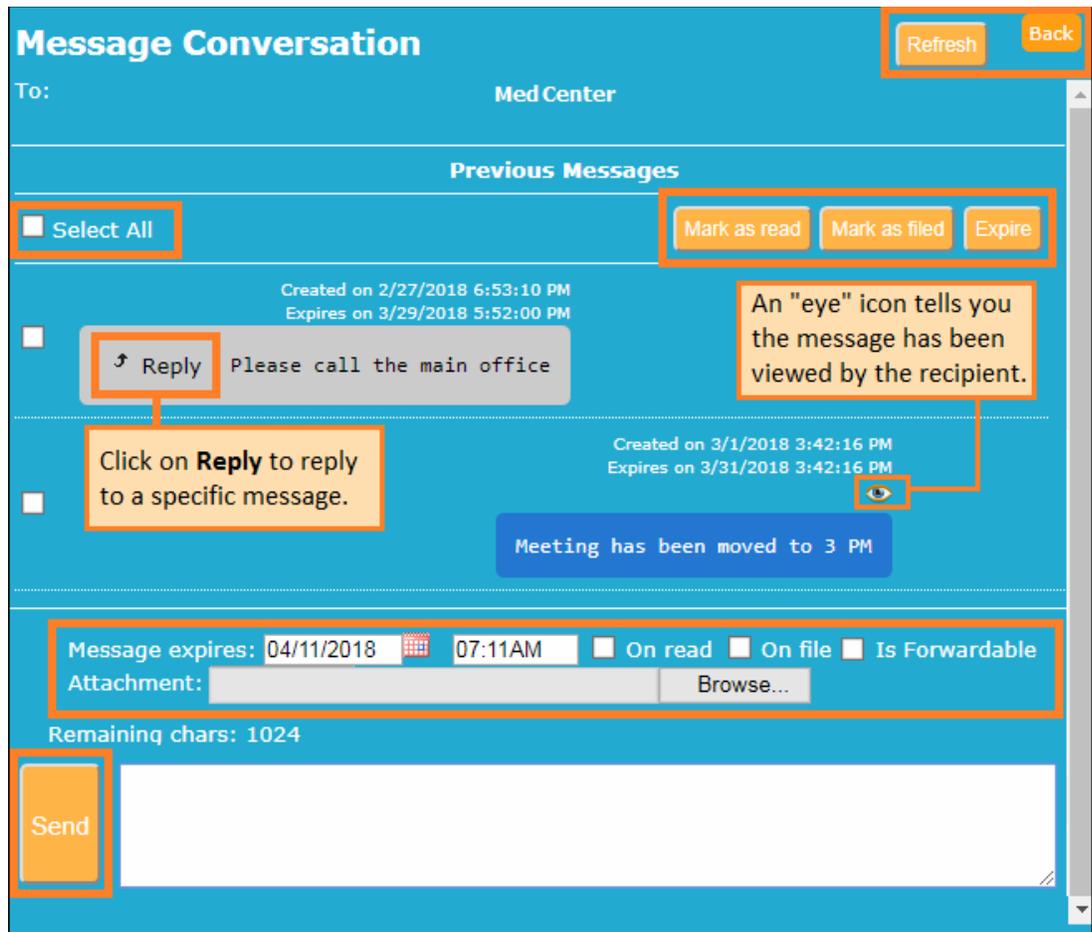
In a Message Conversation screen, you can **read new messages**, **send a message**, and **see previously viewed and sent messages** that haven't expired. You can also **mark messages as read or filed and expire messages**. When a message expires, it is removed from all registered SM+ devices as well as the SM+ Website.

Left-justified messages on a **gray** background are messages that were **SENT TO YOU**.

Right-justified messages on a **blue** background are messages that **YOU HAVE SENT**.

New messages that have NOT been viewed are shown in **boldfaced** text.

Messages that have been viewed are marked with the  icon.



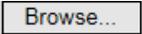
Major features are highlighted in this sample screen. For more on using Message Conversation features, see [page 11](#).

### Marking Messages as Read, Filed, & Expired

- Checking the checkbox for a message **selects** the message.
- Marking a selected message as **'Read'** lets the sender know that you have read the message. (This applies only to *received* messages.)
- Marking a selected message as **'Filed'** files/delivers the CMC message.
- **Expiring** a selected sent or received message removes the message from all locations, including the other party's device(s) and the SM+ database.

## Using SM+ Features in a Conversation

See the table below for details on how to use features available in an open conversation to perform various SM+ tasks.

Task	Instructions
<p><b>Send a Message</b></p> <p><b>Note on Step 4</b> The 'Is Forwardable' checkbox is not present if your subscriber profile does not have forwarding rights.</p>	<p><b>Follow these steps to send a message from the Message Conversation screen:</b></p> <ol style="list-style-type: none"> <li><b>1</b> Type up to 1024 characters in the text field to the right of the <b>Send</b> "button."</li> <li><b>2</b> If you want to attach an <b>audio</b> or <b>image</b> file to the message, click , then select the file.</li> <li><b>3</b> To set a message expiration preference, do any of the following: <ul style="list-style-type: none"> <li>• Fill in the date/time fields if you want the message to expire on a specific date and time. (A default expiration time is automatically set.)</li> <li>• Select <b>On read</b> if you want the message to expire upon being marked by the receiver as '<b>read</b>'</li> <li>• Select <b>On file</b> if you want the message to expire upon being <b>filed</b> by the receiver.</li> </ul> </li> <li><b>4</b> If you want the message to be forwardable to another SM+ subscriber, check the <b>Is Forwardable</b> checkbox (if present).</li> <li><b>5</b> When you're ready to send the message, click .</li> </ol> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>➔ You can <b>reply</b> to a specific message by first clicking on <b>Reply</b> in the message you want to respond to.</li> <li>➔ If a message you have received is "forwardable," you can click on <b>Forward</b> inside the message to forward the message to another SM+ subscriber.</li> </ul>

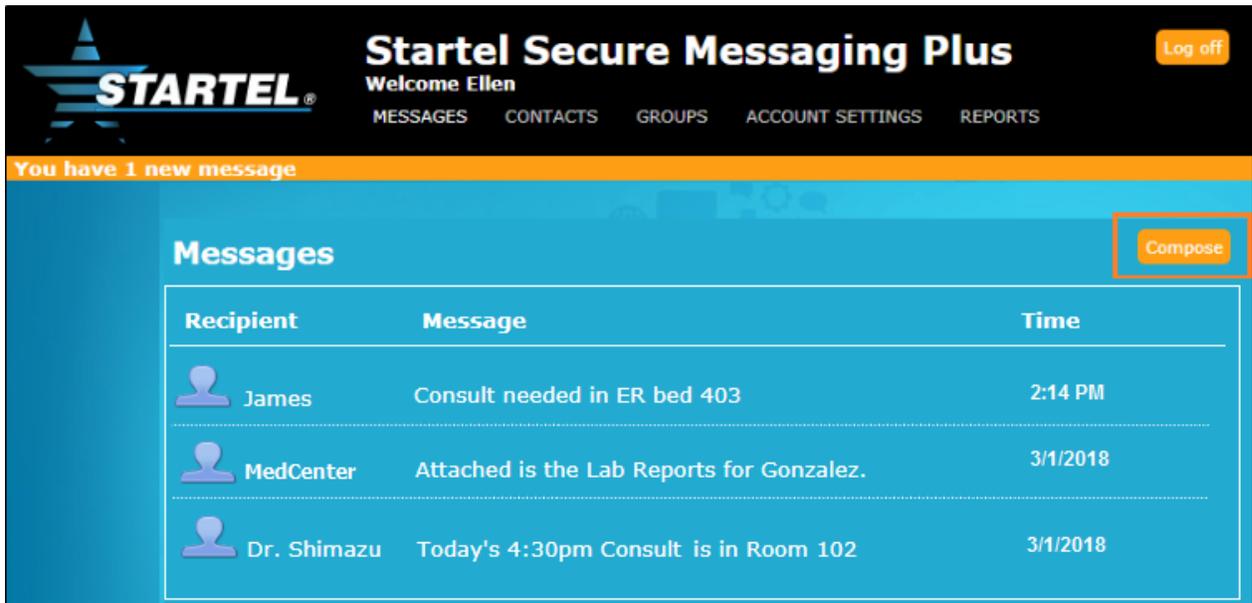
Task	Instructions
<p><b>Expire Existing Messages</b></p>	<p>When a message is “expired,” it is removed from the SM+ Website and database and from all devices containing the message (including the other party’s device).</p> <p>If you like, you can immediately expire both Sent <i>and</i> Received messages from a conversation.</p> <p><b>Follow these steps to expire one or more messages:</b></p> <ol style="list-style-type: none"> <li>1 Check the checkbox associated with each message you want to expire. (If you want to expire ALL messages in the conversation, select the checkbox labeled <b>Select All</b>.)</li> <li>2 Click .</li> </ol> <p>➔ <b>CAUTION:</b> Please be cautious with this feature. Items that are expired cannot be recovered.</p>
<p><b>File Messages Received From your contact center</b></p>	<p>Messages received from your contact center can be filed from the Message Conversation screen.</p> <p><b>To file one of more messages:</b></p> <ol style="list-style-type: none"> <li>1 Select the checkbox for each message you want to file.</li> <li>2 Click .</li> </ol> <p><b>Notes:</b></p> <p>➔ If you apply the File feature to messages <b>not</b> sent from your call center, the status of the message will be seen as <i>Filed</i>.</p> <p>➔ If you apply the File feature to a message that <b>you</b> sent, there will be no effect, but you will see a warning stating that sent messages cannot be marked as Filed.</p>

Task	Instructions
<p><b>Mark Received Messages as 'Read.'</b></p>	<p>Received messages can be marked as "Read" to let the sender know that you have read the message.</p> <p><b>To mark one or more messages as Read:</b></p> <ol style="list-style-type: none"> <li>1 Select the checkbox for each message you want to mark as Read.</li> <li>2 Click  .</li> </ol> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>➔ If you apply the <i>Mark as Read</i> feature to a message that <b>you</b> sent, there will be no effect, but you will see a warning stating that sent messages cannot be marked as Read.</li> <li>➔ Checking the <b>Select All</b> checkbox selects all messages in the conversation. If you use this checkbox, only messages that were <b>received</b> will be affected by the Mark as Read command.</li> </ul>
<p><b>Refresh the Page with New Messages</b></p>	<p>If one or more new messages are received from a sender associated with an open Message Conversation, you can see the message(s) by clicking  .</p>
<p><b>Go Back to the Main Messages Screen</b></p>	<p>To close the Message Conversation and return to the main Messages page, click  .</p>

## STARTING A NEW CONVERSATION

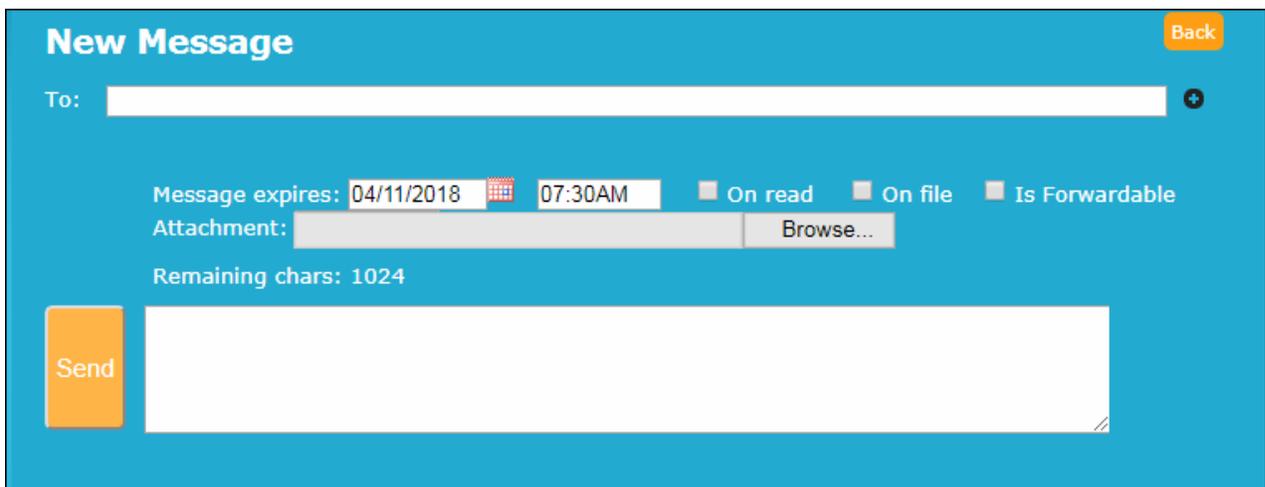
Follow these steps to start a new conversation from the SM+ Messages screen:

- 1 If it is not already displayed, click **Messages** on the SM+ menu to open the Messages page:



In the Messages screen, current conversations are listed, with the SM+ subscribers with whom you have exchanged messages listed in the Recipient column. If any unviewed messages from a subscriber are waiting to be read, you will see a blue number in parentheses after the subscriber's name. For example, **(1)**, for one new message.

- 2 To start a **new** conversation, click **Compose** to open a New Message screen.



If you enter a valid User name that is not already in your SM+ Contacts list, the subscriber is **automatically** added to your Contacts list.

- 3 In the **To** field, enter the SM+ **User name** of the SM+ subscriber or Group to whom you want to send the message. If you enter a valid User name that is not already in your SM+ Contacts list, the subscriber is **automatically** added to your Contacts list. For more on the Contacts list, see [page 17](#).

**Note:** If you click  to right of the **To** field, you can select a Contact or Group from a list. For more on 'Groups,' see [page 18](#).

- 4 Type up to 1024 characters in the Send text box.
- 5 If you want to send an **audio** or **image** attachment with the message, click  , then select the file you want to attach.
- 6 If you want to set an expiration (other than the default) for the message, do any of the following:
  - Specify a date and time for the message to expire. (Dates can be typed or selected from a calendar. Times can be typed or selected from a menu.)
  - Select **On read** if you want the message to expire upon being marked by the receiver as **Read**.
  - Select **On file** if the message should expire when marked as **filed**.

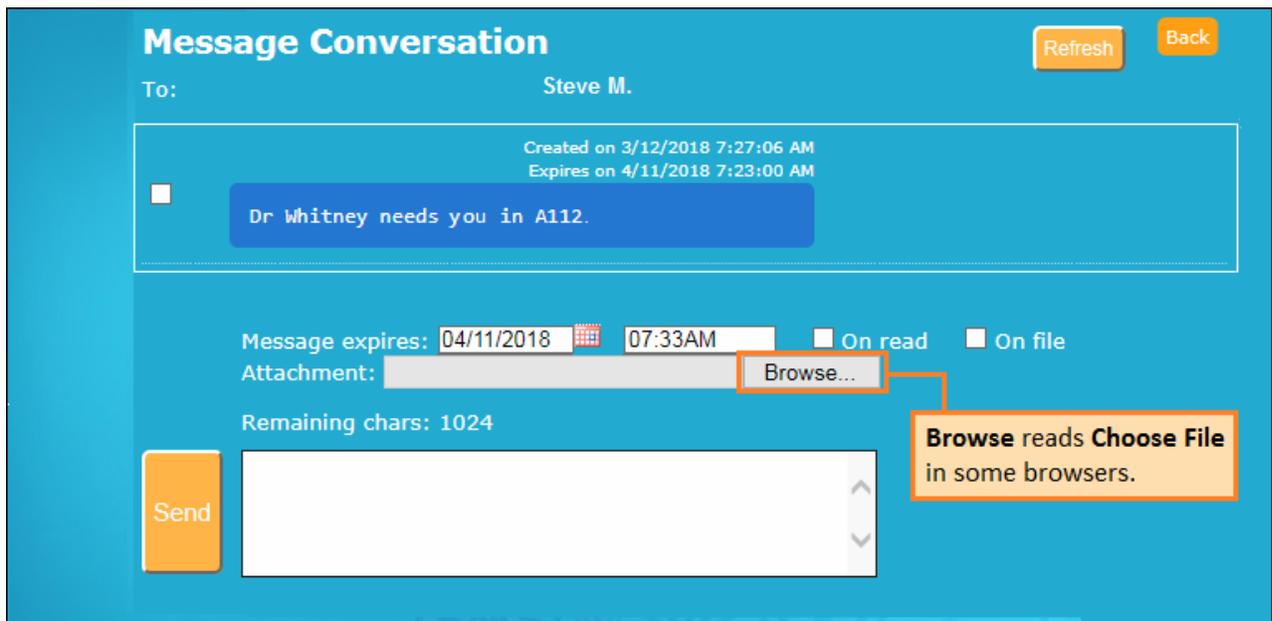
**Note on Step 7**

The '**Is Forwardable**' checkbox is not present if your subscriber profile does not have forwarding rights.

- 7 If you want the message to be forwardable by other SM+ subscribers, select **Is Forwardable**. (Some users will not see this option.)

- 8 When you're ready to send the message, click  .

Now the message you sent is shown in the Message Conversation screen:



- 9 To return to the Messages screen, click **Back**.

Now the new conversation is shown at the top of the Messages screen, with the message recipient's name listed in the Recipient column.

The screenshot shows the 'Messages' screen with a blue header and a 'Compose' button in the top right. A table lists messages with columns for Recipient, Message, and Time. An orange callout box points to the 'Recipient' column with the text: 'To re-open any conversation, click the name in the Recipient column.' The messages listed are:

Recipient	Message	Time
Steve M.	Dr Whitney needs to in A112	7:27 AM
James	Consult needed in ER bed 403	7:03 AM
MedCenter	Attached is the Lab Reports for Gonzalez.	3/2/2018
Dr. Shimazu	Today's 4:30pm Consult is in Room 102	3/2/2018

## MANAGING SM+ CONTACTS

Any time you send a message to a **new** SM+ subscriber (i.e., a subscriber to whom you have never before sent or received a message), the subscriber is added automatically to your SM+ Contacts list. A new Contact is also added whenever you **receive** a message from an SM+ subscriber for the first time.

An “Add Contacts” features in the SM+ Website can also be used to add SM+ users to your Contacts list.

To open your Contacts list, simply select **Contacts** at the top of the Secure Messaging Plus Website.

User name	Last name	First name	Display name		
Dr. Ambrose	Ambrose	Patty	Dr. Ambrose		Delete
Dr. Shimazu	Shimazu	Jackie	Dr. Shimazu		Delete
Dr. Victoria Nelles	Center	Medical	Dr. Victoria nelles		Delete
Dr. Whitney	Whitney	Steven	Dr. Whitney		Delete
Ellen	Smanners	Ellen	Ellen		Delete
James	Allen	James	James		Delete
MaryScott	Scott	Ms. Mary	Mary Scott		Delete

### From the Contacts page you can do any of the following:

If you try to add a subscriber who is already in your Contacts list, an orange banner message will alert you that the Contact already exists.

- Enter an SM+ Username in the text field, then click to add the SM+ subscriber to your Contacts list. (Or click and select from a pop-up list of users.)
- Click to open the current conversation with the associated Contact, or start a *new* conversation if there is no conversation currently ongoing.
- Click a **User name** to display Contact Details for the user, or change the user's Display Name.
- Click to delete the associated Contact from your Contacts list.

## DEFINING SM+ GROUPS & DISTRIBUTION LISTS

SM+ supports two types of group messaging. Both types require the configuration of a “Group” in the SM+ Website. One has the “Distribution List” option enabled, and the other does not.

**The difference between messaging with a Group versus a Distribution List is as follows:**

- When a new message is sent to a **Distribution List**, an *individual conversation* is initiated/updated for each receiving member of the list. When a member replies to the message, the reply is sent only to the original sender of the message.
- When a new message is sent to a **Group**, it starts a **group conversation**. When a group member replies to the message, the reply goes to all members of the group.

To define a Group or Distribution List in the SM+ Website, select **Groups** at the top of the Secure Messaging Plus screen. If you have already created Groups, or if you are a member of any Groups, they are listed in this screen.

Group Name	Owner	Members	Company	Distribution List		
med group	James	James	Medical Center testing	Yes	<input checked="" type="checkbox"/>	Delete
test group	James	James	Medical Center testing	Yes	<input checked="" type="checkbox"/>	Delete

**From here, you can:**

- Click **New Group** to add a new Group or Distribution list. (See [page 19](#).)
- Click  to view or send a message to the associated Group or Distribution List.
- Click **Delete** to delete a Group or Distribution List.

## Adding a Group or Distribution List

Follow these steps to configure a Group or Distribution List:

- 1 If it's not already open, select **Groups** from the SM+ menu to open the Groups page (see [page 18](#)).
- 2 Click **New Group** to open a screen like the following:

The screenshot shows a 'New Group' configuration screen with a blue background. At the top right is a 'Cancel' button. The main content area has the following fields and options:

- Group Name:** A text input field.
- Sub-Company:** A dropdown menu with 'Medical Center testing' selected.
- Is Public Group**
- Is Distribution List**
- Save** button at the bottom.

- 3 In the **Group Name** field, enter a name for the Group. (The **Sub-Company** to which you're assigned is entered by default.)
- 4 Do the following:
  - If you want the group to appear as a Contact to users within your company who are both members and non-members of the group, select **Is Public Group**.
  - If you want the group to function as a Distribution List (as described on [page 18](#)), select **Is Distribution List**.
- 5 Click **Save** to save and display a new set of fields and settings:

The screenshot shows the 'Groups > AM Group' configuration screen. It includes the following elements:

- Group Name:** 'AM Group' (text input)
- Sub-Company:** 'Medical Center testing' (dropdown)
- Is Public Group**
- Is Distribution List**
- Members:** A text input field and an **Add Members** button.
- Members Table:**

User name	Last name	First name	Company	
MedCenter	Center	Medical	Medical Center testing	<b>Remove</b>
- Save** button at the bottom.

You will automatically be included as a member of the Group.

- To add **each** member to the group, enter the subscriber's SM+ User name into the Members field, then click **Add Members**.

Each time you add a new member, you will see the SM+ User name added to the list of members:

**Groups > AM Group** Cancel

Group Name:

Sub-Company:

Is Public Group

Is Distribution List

Members:  Add Members

User name	Last name	First name	Company	
James	Allen	James	Medical Center testing	<span>Remove</span>
MedCenter	Center	Medical	Medical Center testing	<span>Remove</span>

Save

- When you have finished adding members, click **Save** to save the new Group/Distribution List.

## UPDATING SM+ ACCOUNT SETTINGS

Selecting **Account Settings** at the top of the SM+ screen opens a page where you can change various settings associated with your SM+ subscriber's account.

**Startel Secure Messaging Plus** Welcome Medical Center Log off

MESSAGES CONTACTS GROUPS **ACCOUNT SETTINGS** CHANGE PASSWORD DEVICES REPORTS

### Account Settings for MedCenter

This setting determines how often you're notified when a message is received. Options are:

- Only once (default)
- Each minute
- Every 2 minutes
- Every 5 minutes
- And so on.

This enables/disables message forwarding.

These menu items appear in the Account Settings screen. See the page that follows for details on these features.

First name: Medical Center  
Last name: Medical Center  
Display name: Medical Center  
Email address:

Device notification frequency: Every 10 minutes

Forward Policy:  Default sent messages as Confidential

Expire Message:  On read  On file

Max message expiration time:

Days: 30  
Hours: 0  
Minutes: 0

**Save** Click **Save** to save changes to Account Settings.

### In this page:

- If you change **Name** settings, the changes are automatically applied to the Contact lists of other subscriber's whose lists include you as a Contact.
- The **Device notification frequency** setting determines how often SM+ devices registered to this user profile will receive a notification for messages that are waiting to be viewed.
- The **Forward Policy** setting, if checked, determines that, by default, messages sent by this subscriber will **not** be enabled as forwardable. (Users whose companies do not allow forwarding will not see this option.)

**Please Note:**

When a message is **expired**, it is removed from all devices (both sender's and receiver's), from the SM+ Website, and from the SM+ database.

- **Expiration Message** settings determine when your sent messages will 'expire' if they're not manually expired by you or the message recipient using the **Expire** feature described on [page 12](#).
  - If you select the **On read** checkbox, sent messages will expire when they are marked as '**read**' by the message recipient.
  - If you select the **On file** checkbox, sent messages will expire when they are '**filed**' by the message recipient.
  - **Max message expiration time**—expressed as **Days, Hours, and Minutes**—specifies a default expiration time for sent messages that are not expired by other means (*on read, on file, or manually*).

## Using the Change Password Feature

Selecting **Change Password** at the top of the Account Settings screen allows you to change your SM+ password.



**Change Password**

Current password:

New password:

Confirm password:

**Follow these steps to change your password:**

- 1 Enter your current password in the **Current Password** field.
- 2 Enter a new password in the **New Password** and **Confirm Password** fields.
- 3 Click  .



**NOTE:** A “strong” password containing letters, numbers, a special character, and upper and lower-case letters is recommended, and may be set as a requirement for a user by a Sub-Company Administrator.

## Using the Devices Feature

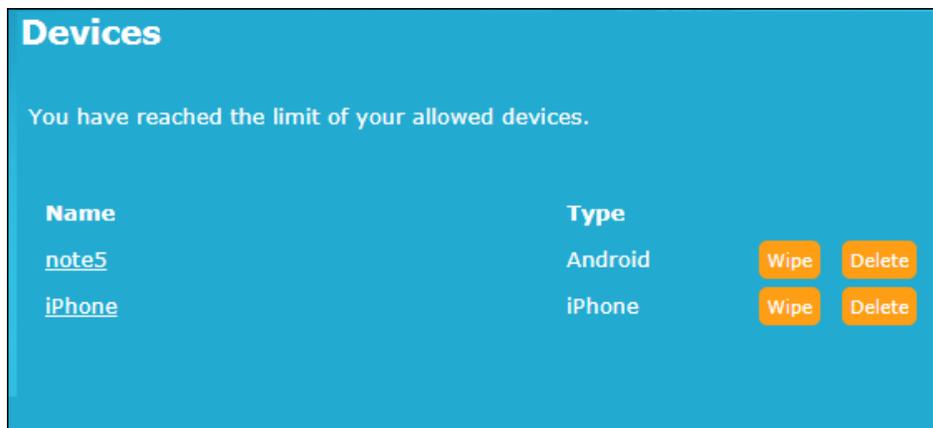
### Please Note:

If you send a Wipe command from the SM+ Website while also logged into the SM+ App on a device, messages and attachments are deleted from the device, and you are logged out of the App.

If you send a Wipe command when the SM+ App is closed or you are not logged in to the App, the Wipe will execute on the device the next time the App is opened.

Selecting **Devices** at the top of the Account Settings page lists all your registered SM+ devices, if any.

**Wipe** and **Delete** options for each listed device allow you to remotely wipe (remove) SM+ messages and attachments from any listed device, or delete the SM+ registration for a device (which also wipes the device).



- To wipe all SM+ data from a device, click the associated **Wipe** button. When a confirmation message displays, click **Wipe** to confirm.
- To delete the SM+ registration and wipe the SM+ data from the device, click the associated **Delete** button. When a confirmation message displays, click **Delete** to confirm.

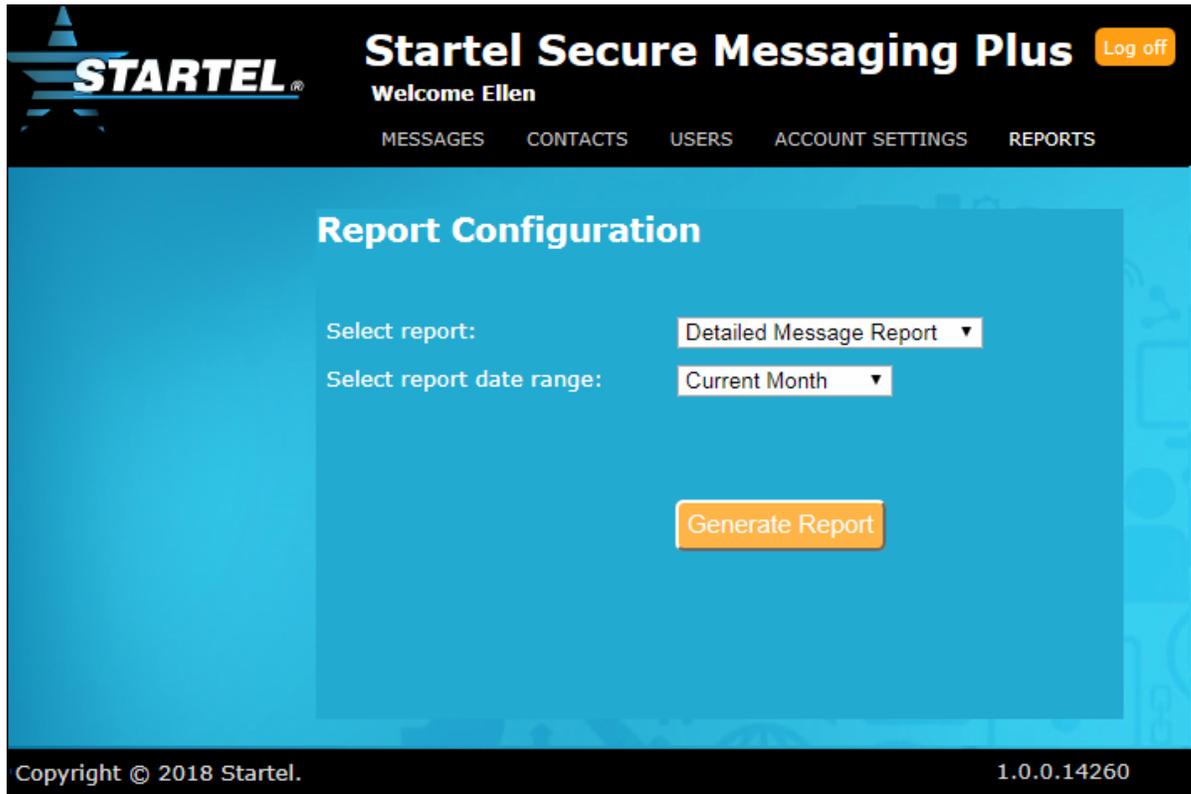


### NOTES:

- After using the Wipe command, **logging in** to the SM+ App with valid credentials returns wiped messages (that have not expired) to the device.
- Performing a Delete does not uninstall the SM+ App from the device. An Uninstall of the SM+ App will have to be performed from the device.

# RUNNING SECURE MESSAGING PLUS REPORTS

Selecting **Reports** at the top of the SM+ screen displays a page from which you can run Secure Messaging Plus reports.



Expired message audit trails are included in reports, but reports do not show the text associated with those or any other messages.

Two types of reports are available: **Detailed Message** and **Summary**.

- **Detailed Message Reports** show you detailed information about when messages were sent, received, viewed, expired, etc. during a selected time frame. (Message text is **not** included).
- **Summary Reports** show **how many** messages were sent and received during a selected time frame.

See the topics that follow for more information on running reports.

## Running a Detailed Message Report

A Detailed Message report shows you detailed information about when messages were sent, received, viewed, expired, etc. during a selected time frame. The actual messages are **not** included in the report.

### Follow these steps to run a Detailed Message report:

- 1 Select **Reports** at the top of the SM+ screen.
- 2 Select **Detailed Messages** from the report type drop-down menu.
- 3 Select the desired date range from the date range menu. Options are:
  - Current Day
  - Previous Day
  - Current Week
  - Previous Week
  - Current Month
  - Previous 90 Days
  - Previous 90 Days
  - Custom Range
- 4 If you selected Custom Range, indicate the desired date range in the date fields that appear.
- 5 Click **Generate Report** when you're ready to generate the report.

**Current Month** is selected by default.

Here is a sample Detailed Message report:

**Detailed Report for Ellen** Export Back  
March 02, 2018 - March 12, 2018

Sent message ID 259482 to MedCenter on 3/2/2018 10:03:25 AM

Sent from Ellen's Web device (Web)

Downloaded to note5 (Android) on 3/2/2018 10:03:26 AM

Viewed from note5 (Android) on 3/2/2018 10:16:37 AM

Downloaded to note5 (Android) on 3/2/2018 11:14:28 AM

Expired on 3/12/2018

Received message ID 259507 from MedCenter on 3/12/2018 7:27:06 AM

Sent from MedCenter's Web device (Web)

Viewed from Ellen's Web device (Web) on 3/12/2018 7:51:09 AM

- 6 If you want to export the report to a file, click **Export**.
- 7 To exit the report, click **Back**.

## Running a Summary Report

A Summary report shows you how many messages you have sent and received during a selected time frame.

### Follow these steps to run a Summary report:

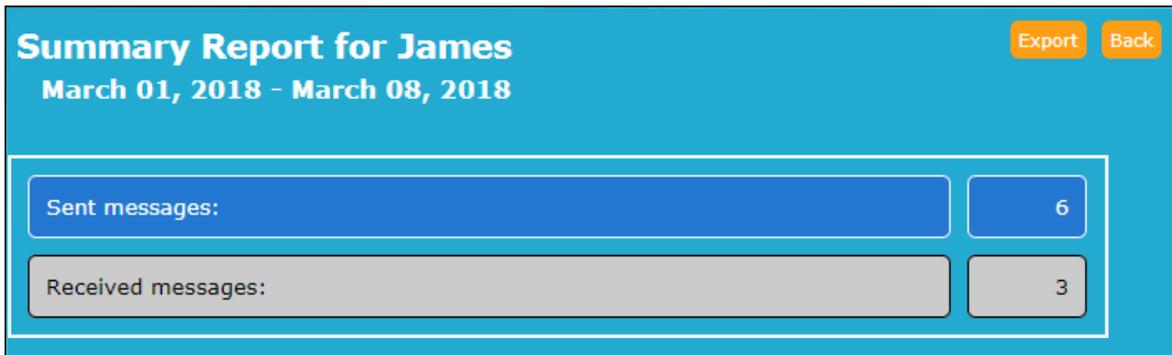
- 1 Select **Reports** at the top of the SM+ screen.
- 2 Select **Summary** from the report type drop-down menu.
- 3 Select the desired date range from the date range menu. Options are:

**Current Month** is selected by default.

- Current Day
- Previous Day
- Current Week
- Previous Week
- Current Month
- Previous 90 Days
- Previous 90 Days
- Custom Range

- 4 If you selected Custom Range, indicate the desired date range in the date fields that appear.
- 5 Click **Generate Report** when you're ready to generate the report.

Here is a sample Summary report:



- 6 If you want to export the report to a file, click **Export** .
- 7 To exit the report, click **Back** .

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