

## Printing Transaction and Performance Reports and Search Feature in the Blotter

Please review the consolidated [Liberty Office and Client Management User Guide](#), [Liberty Trading User Guide](#), [Liberty Investor Guide](#) and [Liberty Guide for Representatives](#), to learn more about the features available on Liberty.

In Summary, effective March 23, the following features are available:

- **Ability to Print Additional Reports from Liberty:** A PDF record of the following can be created from Liberty and saved locally, in order to keep a permanent record:
  - o **Transaction Over Time Report:** To view a PDF report of the Transactions over time data displayed in Liberty, select the Create Transactions Report button in the side panel. The report will display data based on the screen filters and selections chosen by the user on the Liberty screen. (*Liberty Investor Guide Page 26*)
  - o **Multi-Period Performance Report:** To view a PDF report of the data displayed on the Liberty Performance tab, select the Create Report button in the Action Dock. The report will display data based on the screen filters and selections chosen by the user on the Liberty screen. (*Liberty Investor Guide Page 22*)
  
- **Ability to Search by Security Name in the Blotter:**
  - o You can now search for a specific symbol or security name - this search is performed on all columns displayed in the Blotter and will return any trade where the typed in string matches information being displayed. Searching can be performed for multiple symbols or security names at one time by separating each symbol or security name by a semi-colon: Symbol A; Symbol B; Symbol C, etc. (*Liberty Trading User Guide Page 27*)

For your ease of reference, all Liberty User Guides are available on Liberty and at <http://riaconnection.trustamerica.com/> under Quick Links to the right of our RIAconnection web page.

Please let your relationship manager know if you have questions or would like a demonstration of any Liberty features.