Employer eServices®
Your Suite of Administrative Services

eServices Customer Reporting

version 2.2 for Select/Expanded Services

At-a-Glance

Table of Contents

Introduction

Objective

The *At-a-glance* document is designed to provide a high-level, visual orientation to the reporting application's screens and the features.

Audience

Employers and brokers with *Select* or *Expanded* customer reporting services.

Scope

The *At-a-glance* document contains a screen-by-screen snapshot of the *eServices Customer Reporting* application. The principle features of each screen are numbered. The numbered features are named and defined.

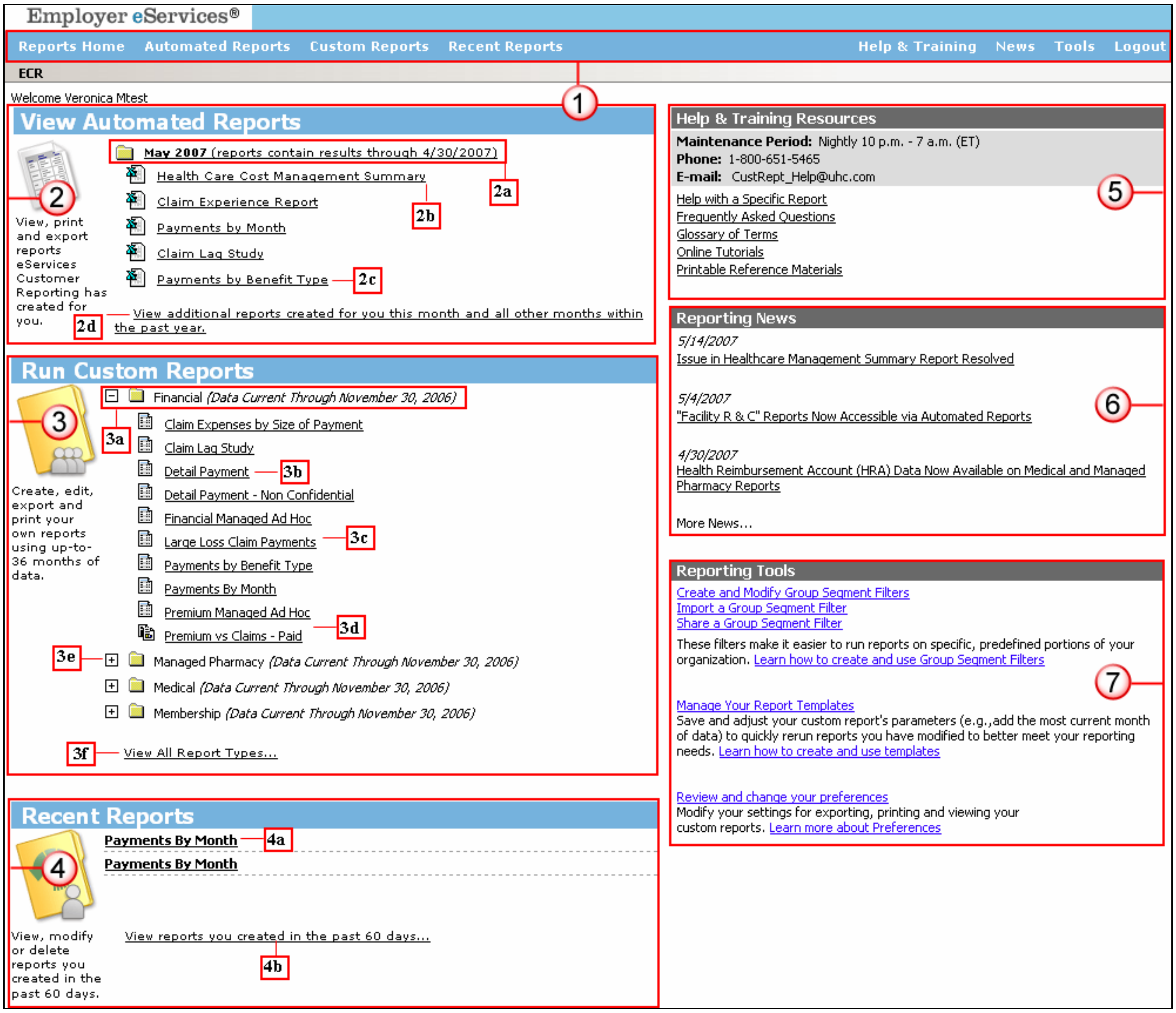
The *At-a-glance* document is not an instructional guide for running, saving, exporting reports, etc.—although it may aide in these processes. The document does not explore reporting features in detail, nor does it provide any information about reports available through the reporting system or the content of those reports.

Other Resources

Other reference materials are available for topics not covered by this document including:

- *Online Help*
- *eLearning tutorials*
- *Quick Reference Cards*

Reports Home Screen



1. **Navigation Bar** – This bar is the primary vehicle for getting one portion of the site to another. It appears at the top of almost every screen (see p. 6).
2. **View Automated Reports** – This section provides access to the most recent set of system-generated reports (see p.7).

   2a. *Folder*- This folder is dynamically updated to display the most recent delivery month of automated reports. This link opens the *Automated Reports* screen for the specified delivery month. The text in parenthesis indicates the scope of data used to produce reports in the specified folder.

Reports Home Screen continued

2b. *Report* – This link opens the specified report in a separate browser window.

2c. *Export* – This button opens the File Download dialog box.

2d. *View Additional Reports…*– This link opens the Automated Reports screen.

3. **Run Custom Reports** – This section provides a starting point for running custom reports (see p.8).

3a. *Report Category Folder* – The folders in this section represent the four main categories of reports. The text in parenthesis is dynamically updated to indicate the most current month of data available to run reports in the specified category.

3b. *Report Link* – This link opens the *Options* screen for the specified report.

3c. *Report Icon* – This image indicates the report contains a single section of output.

3d. *Compound Report Icon* – This image indicates the report contains two or more sections of output.

3e. *Show/Hide* – This icon alternately shows/hides the reports in a specified *Report Category* folder. The contents of the *Financial* folder are shown by default.

3f. View All Report Types – This link opens the Custom Reports screen.

4. **Recent Reports** – This section provides direct access to the two most recent custom reports (see p.22).

4a. *Report Name* – This link opens the *Results* screen for the specified report.

4b. *View Reports* – This link opens the *Recent Reports* screen for the specified report.

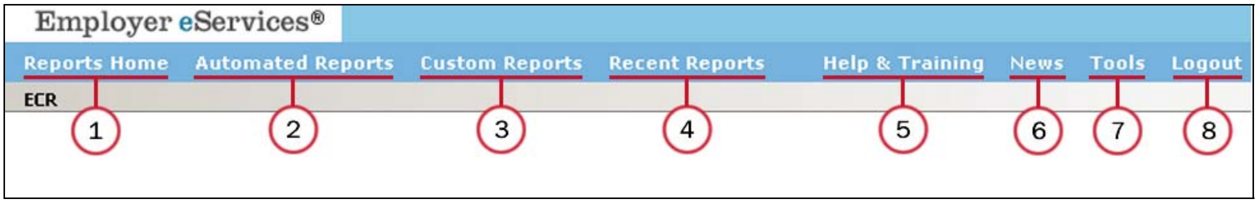
5. **Help & Training Resource** – This section contains various means of getting help with the reporting application, including links to online reference materials and tutorials (see p.31).

6. **Reporting News** – This section contains links to the most recent data and reporting alert messages, as well as a link to an archive of past articles.

7. **Reporting Tools** – This section of the screen contains links to key utilities:

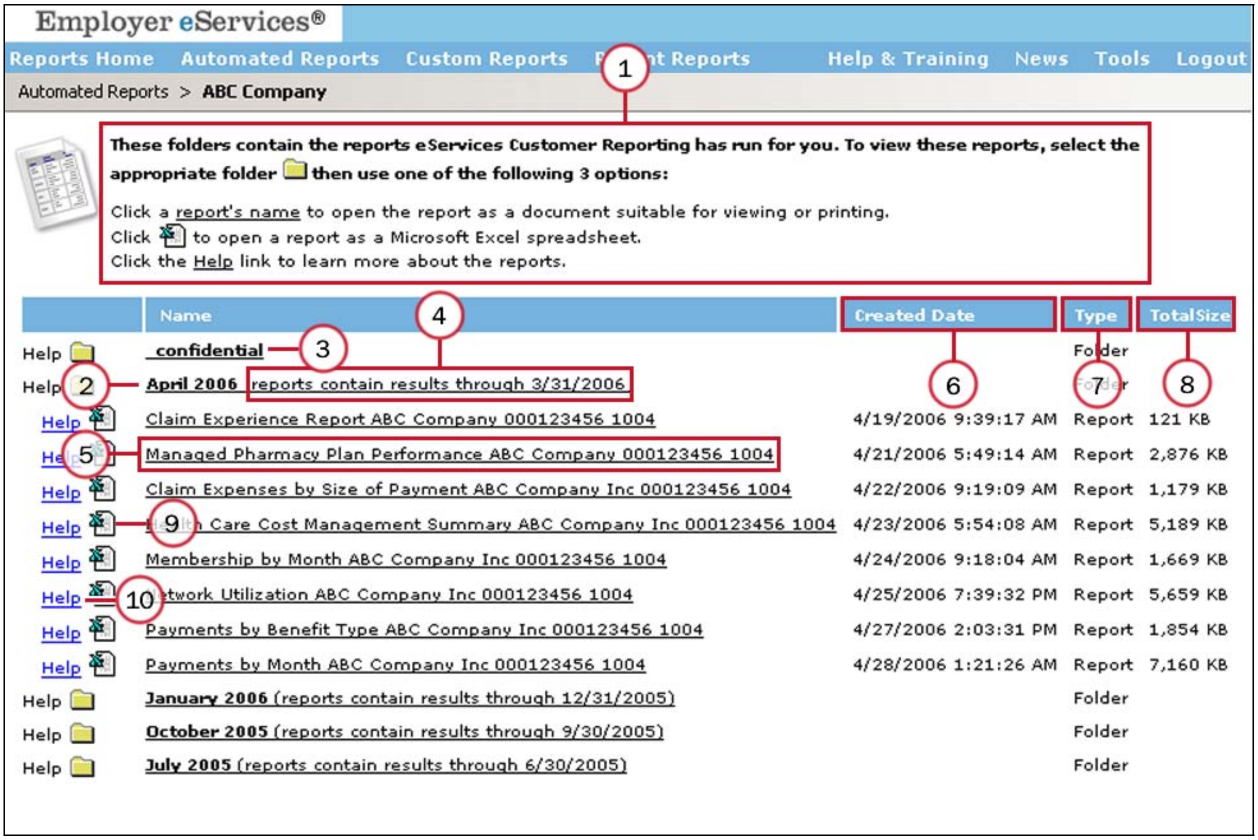
- Create or Modify a Group Segment Filter, Share a Group Segment Filter, and Import a Group Segment Filter
- Manage Report Templates
- Set Preferences

Navigation Bar



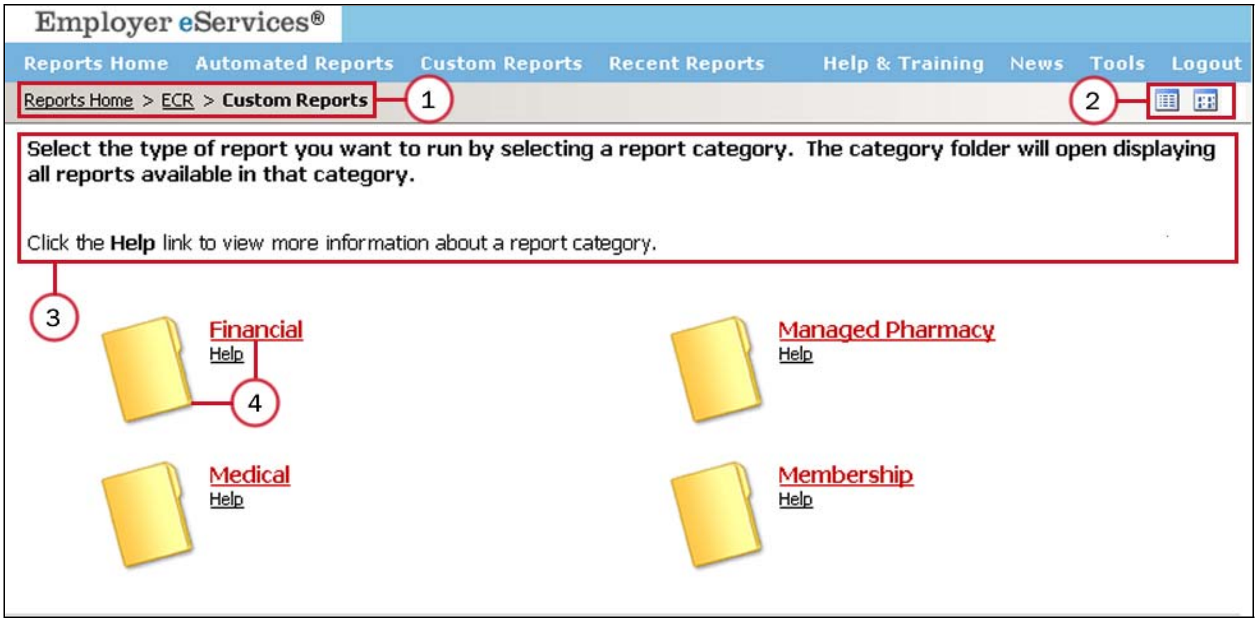
1. **Reports Home** – This link opens the reporting application's default home page.
2. **Automated Reports** – This link opens the screen from which access your system-generated reports.
3. **Custom Reports** – This link opens the screen from which you start the process of running a report.
4. **Recent Reports** – This link opens the screen from which you access reports created during the last 60 days.
5. **Help & Training** – This link opens Online Help in a separate browser window.
6. **News** – This link opens the Reporting News Archives in a separate browser window.
7. **Tools** – This link opens the screen from which you can create a Group Segment Filter, access your report templates and modify your preferences.
8. **Logout** – This link terminates the reporting session.

Automated Reports Screen



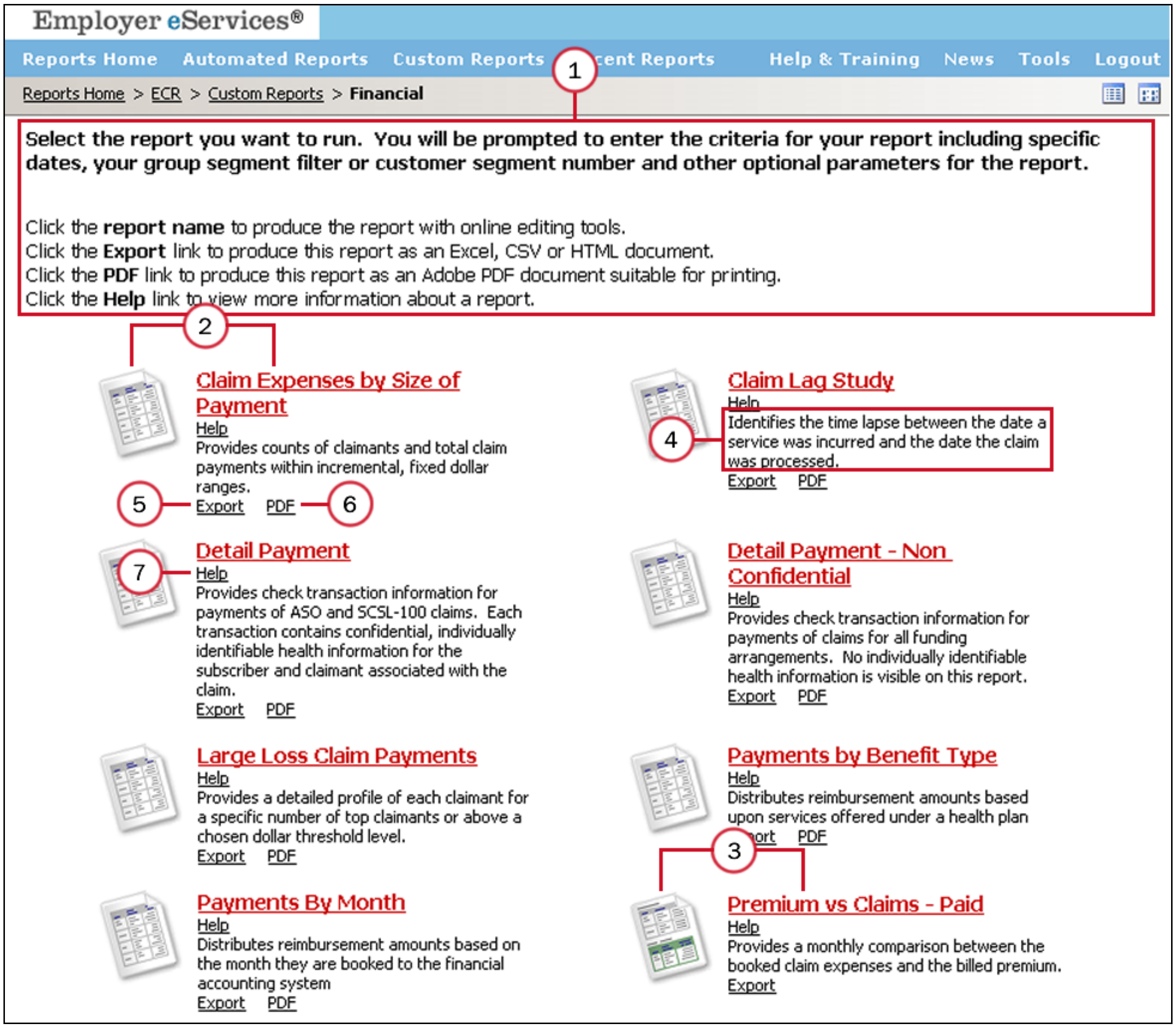
1. **Onscreen Help** – This text summarizes the steps needed to view, export, and get more help with automated reports.
2. **Delivery Month Folders** – These folders contain automated reports delivered during the specified month. The contents of the most recent folder are displayed automatically. A folder is only generated for months in which automated reports are delivered.
3. **Confidential Reports Folder** – This folder contains reports with protected health information (PHI). The confidential reports are sorted into a separate set *Delivery Month Folders* within this folder.
4. **Period End Date** – This date indicates scope of data used to produce reports in the specified folder.
5. **Report** – This link opens the results of the specified report.
6. **Created Date** – The date shown in this column indicate the point in time an automated report was produced.
7. **Type** – This column indicates if the item in a specified row is a folder or a report.
8. **Total Size** – The KB (kilobyte) amounts in this column indicate a report's file size.
9. **Export** – This icon converts the specified report into a downloadable .xls (Excel) file.
10. **Help** – These links open Online Help for automated reports.

Custom Reports Screen- Folder Level



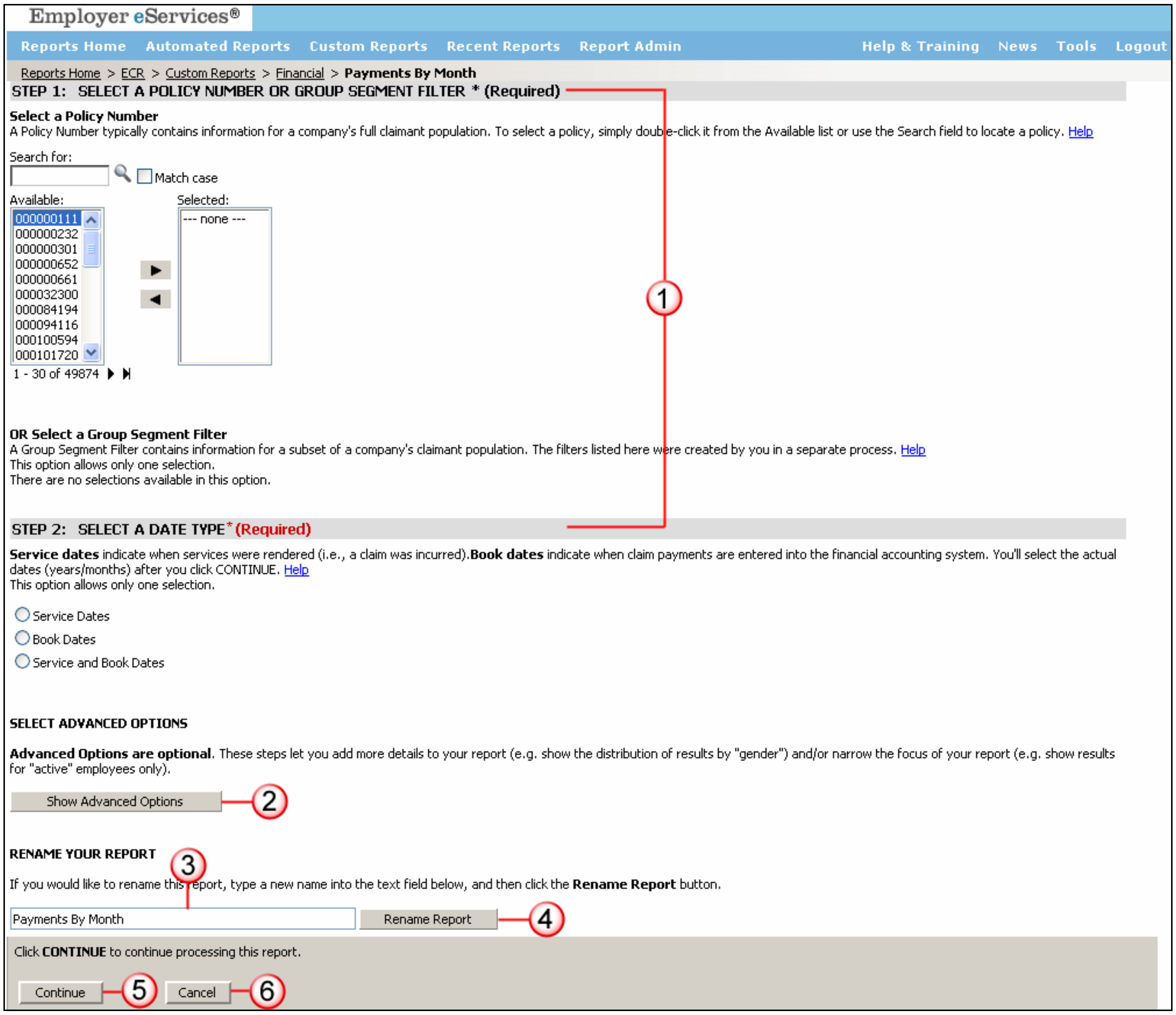
1. **Breadcrumb Trail** – The links in the breadcrumb trail provide a path of hyperlinks to previous screens.
2. **Display Style** – These icons toggle the screen between displaying content in an icon [shown] or list format.
3. **Onscreen Help** – This text summarize the process of selecting a report category.
4. **Report Category Folders** – These icons/links open the specified report category. Each folder contains reports with a similar business purpose.

Custom Reports Screen- Report Level



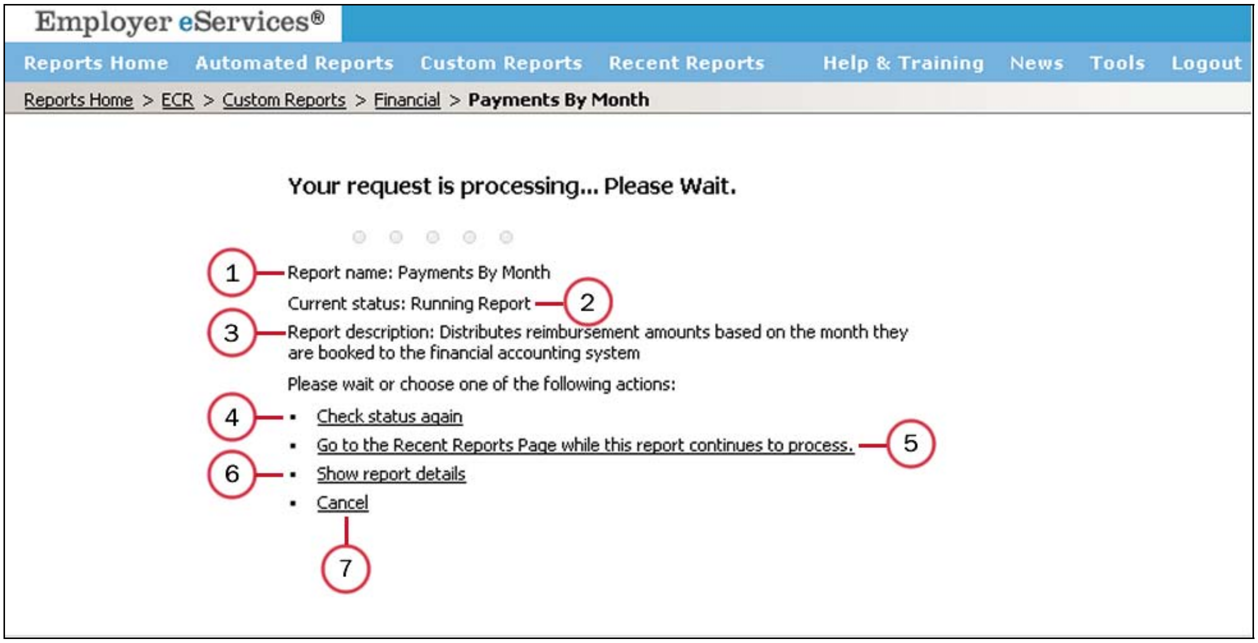
1. **Onscreen Help** – This text summarize the steps for selecting and running a report.
2. **Report** – These icons/links open the option screen for the specified report. The report contains a single section of output. Results are displayed in an online format.
3. **Compound Report** – These icons/links open the option screen for the specified report. The report contains multiple sections of output. Results are displayed in an online format.
4. **Description** – This text explains the business purpose of the specified report.
5. **Quick Export** – The *Export* links open the option screen for the specified report or compound report. Results are converted into .xls, .csv, .htm, or .txt file format. The formats are suitable for viewing in Microsoft Excel.
6. **Quick PDF** – The *PDF* links open the option screen for the specified report. Results are converted into a .pdf file. PDF files are suitable for viewing in Adobe Reader.
7. **Help** – These links open *Online Help* for the specified report.

Report Selections Screen



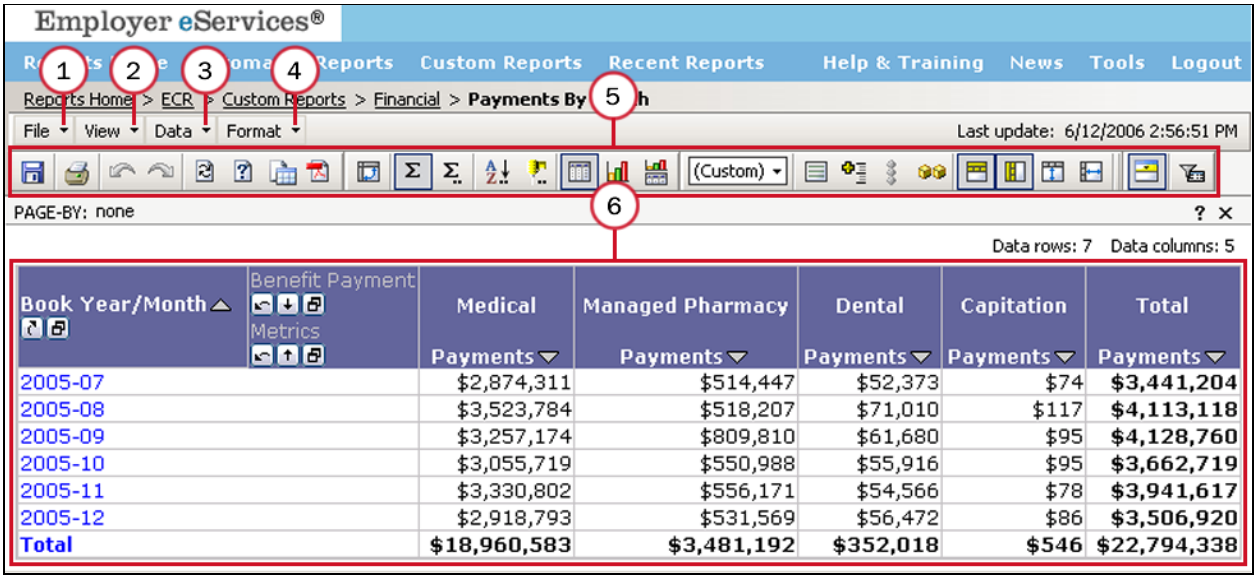
1. **Required Steps** – These items set the conditions necessary to run the report. All reports require you to select the population and time period you want to investigate. Some reports require you to set additional parameters.
2. **Advanced Options** – This button displays any optional steps onscreen. Optional steps let you add more details to your report, limit the report to a more defined subset of the population, or both.
3. **Rename field** – This field contains the report's name. The field is editable.
4. **Rename button** – This button implements any name change entered into the *Rename* field.
5. **Continue** – This button processes all the conditions established on this screen. If the conditions to process the report are all satisfied, the report's results are generated; otherwise, another set of options are displayed to satisfy the remaining conditions.
6. **Cancel** – This button terminates the report request.

Processing Screen



1. **Name** – This is the name of the report for which results are currently being processed.
2. **Status Message** – This message indicates the reports current position within the overall processing cycle.
3. **Description** – This text provides a brief definition of the report’s business purpose.
4. **Check Status Again** – This link updates the report’s status. The status automatically updates approximately every 5 seconds.
5. **Go to Recent Reports** – This link opens the *Recent Reports* screen. The *Recent Reports* screen provides access to reports submitted within the past 60 days. Selecting this link does not interfere with the report currently being processed.
6. **Show Report Details** – This link opens the *Report Details* screen. The *Report Details* screen outlines the conditions for the report request. Selecting this link does not interfere with the report currently being processed.
7. **Cancel this Request** – This link terminates the report request.

Results Screen- Reports

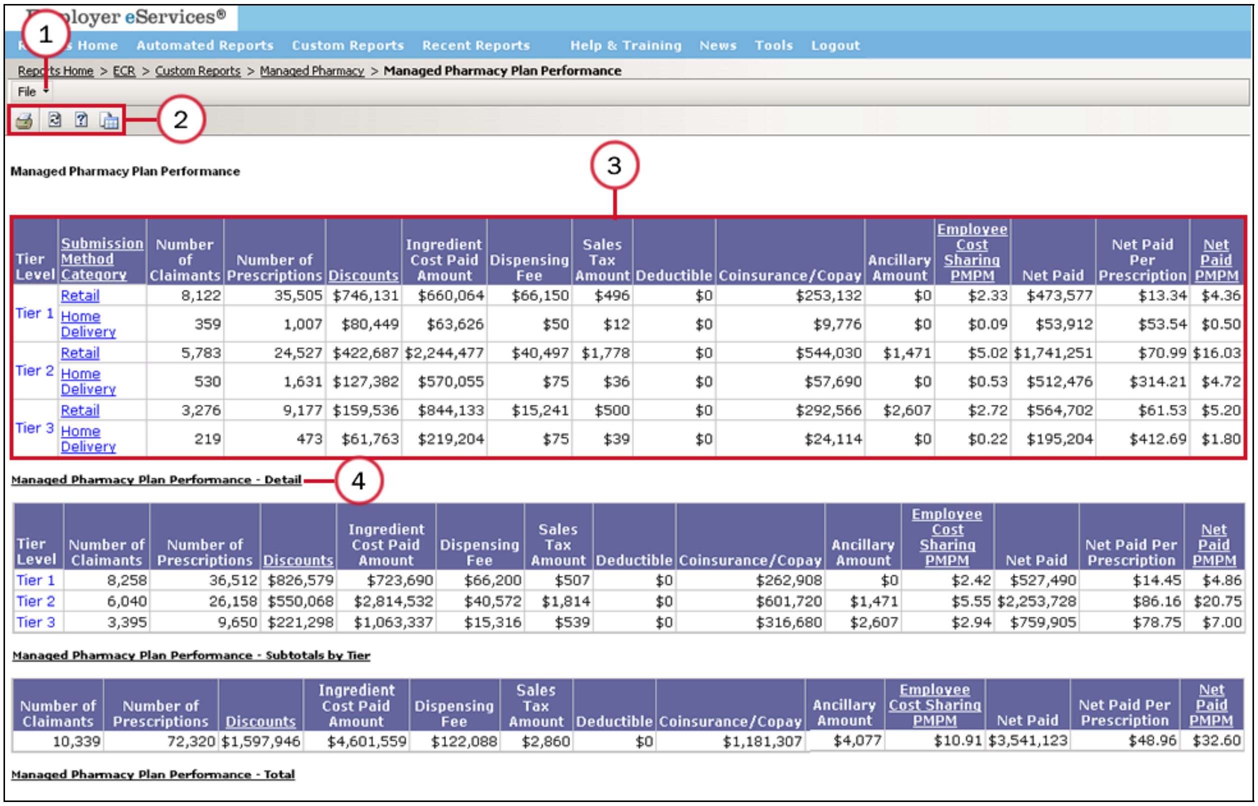


Book Year/Month	Benefit Payment / Metrics	Medical Payments	Managed Pharmacy Payments	Dental Payments	Capitation Payments	Total Payments
2005-07		$2,874,311	$514,447	$52,373	$74	**$3,441,204**
2005-08		$3,523,784	$518,207	$71,010	$117	**$4,113,118**
2005-09		$3,257,174	$809,810	$61,680	$95	**$4,128,760**
2005-10		$3,055,719	$550,988	$55,916	$95	**$3,662,719**
2005-11		$3,330,802	$556,171	$54,566	$78	**$3,941,617**
2005-12		$2,918,793	$531,569	$56,472	$86	**$3,506,920**
Total		**$18,960,583**	**$3,481,192**	**$352,018**	**$546**	**$22,794,338**

1. **File menu** – This menu provides access to a report's file management features—including *Save* , *Print*, and *Export* .
2. **View menu** – This menu provides access to buttons and other controls that can be toggled into/from view. It also provides access to the graphing feature.
3. **Data menu** – This menu provides access to controls for editing a report's results—including *Sort*, *Refresh*, and *Drill*[1] .
4. **Format menu** – This menu provides access to the *Grid Options* dialog box.
5. **Toolbar** – The toolbar contains a set of graphical buttons that provide one-click access to an array of dynamic reporting features and other controls.
6. **Grid** – A grid displays the report's results in a table.

[1]The *Drill* feature is only available with *Expanded* services

Results Screen- Compound Reports


Employer eServices®
Reports Home | Automated Reports | Custom Reports | Recent Reports | Help & Training | News | Tools | Logout
Reports Home > ECR > Custom Reports > Managed Pharmacy > Managed Pharmacy Plan Performance
File

Managed Pharmacy Plan Performance

Tier Level	Submission Method Category	Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
Tier 1	Retail	8,122	35,505	$746,131	$660,064	$66,150	$496	$0	$253,132	$0	$2.33	$473,577	$13.34	$4.36
	Home Delivery	359	1,007	$80,449	$63,626	$50	$12	$0	$9,776	$0	$0.09	$53,912	$53.54	$0.50
Tier 2	Retail	5,783	24,527	$422,687	$2,244,477	$40,497	$1,778	$0	$544,030	$1,471	$5.02	$1,741,251	$70.99	$16.03
	Home Delivery	530	1,631	$127,382	$570,055	$75	$36	$0	$57,690	$0	$0.53	$512,476	$314.21	$4.72
Tier 3	Retail	3,276	9,177	$159,536	$844,133	$15,241	$500	$0	$292,566	$2,607	$2.72	$564,702	$61.53	$5.20
	Home Delivery	219	473	$61,763	$219,204	$75	$39	$0	$24,114	$0	$0.22	$195,204	$412.69	$1.80

Managed Pharmacy Plan Performance - Detail

Tier Level	Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
Tier 1	8,258	36,512	$826,579	$723,690	$66,200	$507	$0	$262,908	$0	$2.42	$527,490	$14.45	$4.86
Tier 2	6,040	26,158	$550,068	$2,814,532	$40,572	$1,814	$0	$601,720	$1,471	$5.55	$2,253,728	$86.16	$20.75
Tier 3	3,395	9,650	$221,298	$1,063,337	$15,316	$539	$0	$316,680	$2,607	$2.94	$759,905	$78.75	$7.00

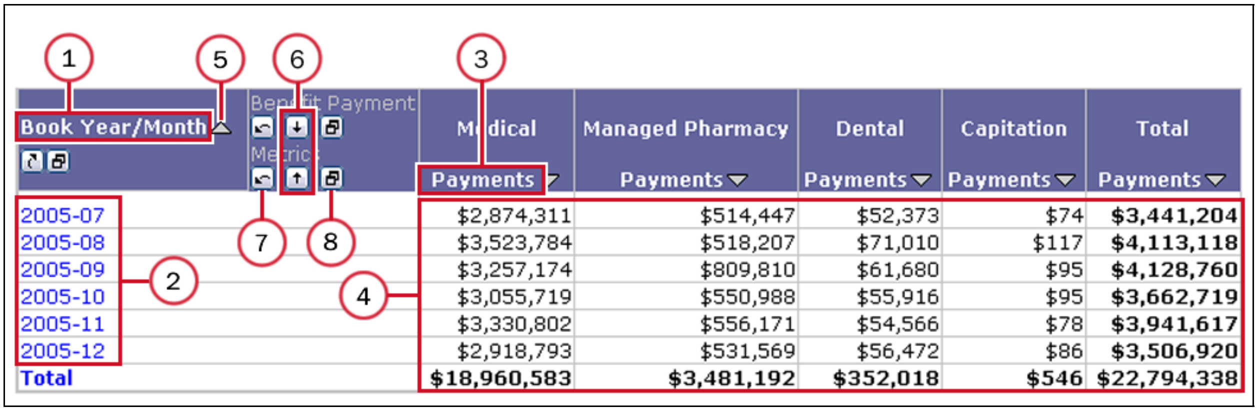
Managed Pharmacy Plan Performance - Subtotals by Tier

Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
10,339	72,320	$1,597,946	$4,601,559	$122,088	$2,860	$0	$1,181,307	$4,077	$10.91	$3,541,123	$48.96	$32.60

Managed Pharmacy Plan Performance - Total

1. **File menu** – This menu provides access to all features available for compound reports—including *Print* , *Export*, *Refresh* and *Re-prompt*.
2. **Toolbar** – The toolbar contains a set of graphical buttons that provide one-click access to the *Print*, *Refresh*, *Re-prompt*, and *Export* features.
3. **Report Section** – Each section of a compound report is actually an individual report that can be opened separately via a link located below it.
4. **Section Hyperlink** – This hyperlink opens the specified section of the compound report. Once a section is opened, it can be formatted and manipulated using the full array of menu and toolbar options common to most reports.

Results Screen- Report Grid



Book Year/Month	Benefit Payment / Metrics	Medical Payments	Managed Pharmacy Payments	Dental Payments	Capitation Payments	Total Payments
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1. **Attribute** – An attribute classifies a set of related values. For example, *Book Year/Month* is an attribute used to categorize a set of dates in which a claim was booked to the financial accounting system.
2. **Values** – A value identifies an exclusive subset of data. For example, *2005-07* is a value used to identify the year (2005) and month (07) in which claims were booked to the financial accounting system.
3. **Metric** – A metric is a measurement used to calculate report results (i.e., calculated values).
4. **Calculated Values** – Calculated values are the results of the report's measurements (i.e., metrics). Calculated values are computed for any subsets of the population (i.e., values) displayed in the report, and are often shown in aggregate (i.e., grand total).
5. **Sort** – This button opens the *Sort* dialog box. The dialog box has controls for orientating results in ascending or descending order by up-to-3 attributes/metrics.
6. **Move** – These buttons reposition items within the report grid.
7. **Pivot** – This button switches specified items from the columns to the row of the report, and vice versa. Each attribute has its own *pivot* button; metrics, however, share a single *pivot* button.
8. **Page-by** – This button pulls a specified item from the report and place it into the *Page-by Axis* panel. The panel has controls to view results one value/metric at a time. Each attribute has its own *page-by* button; metrics, however, share a single *page-by* button.

Results Screen- Toolbar

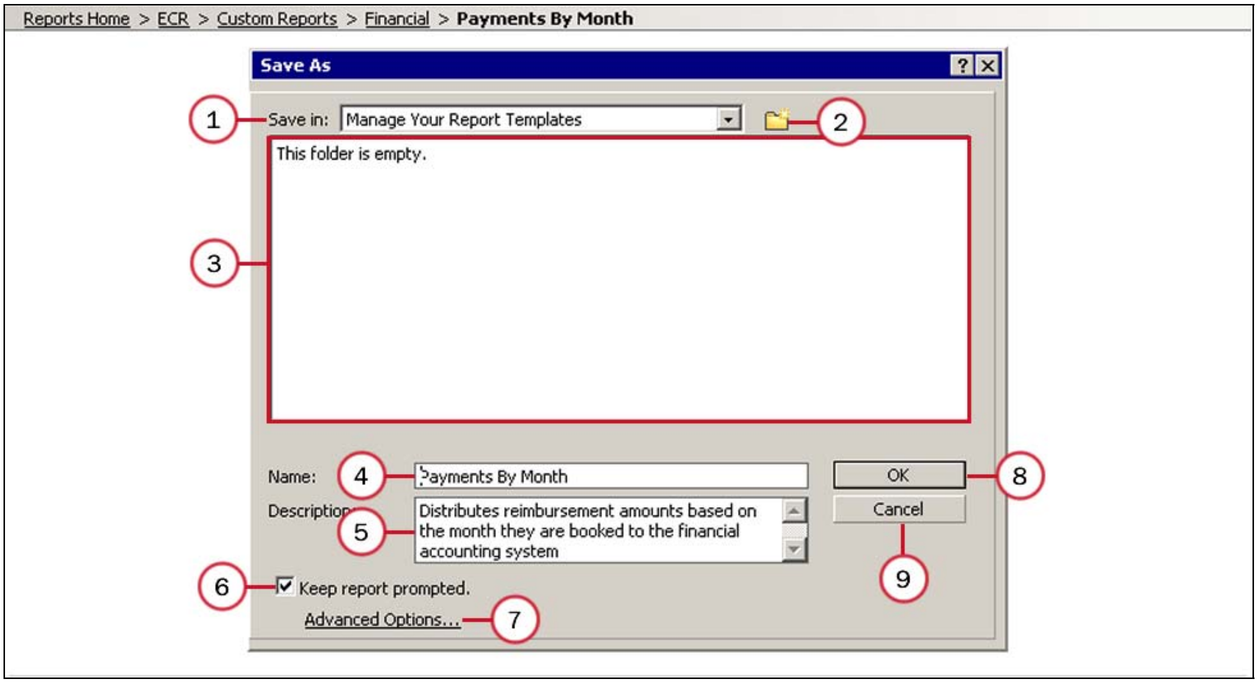
Report Toolbar

Compound Report Toolbar

Button	Name	Function
	Save	Opens the Save As dialog box. This option saves the report as a template or as a “static” copy.
	Print	Opens the *Print Options* screen. The screen contains options to create a printable version of the report.
	Undo	Returns the report to a previous state by reversing the effects of one or more commands.
	Redo	Provides the opposite function of *undo*. If a command is undone, it can be reestablished by selecting *redo*.
	Refresh	Re-executes the report against the records in the database.
	Reprompt	Opens the *Options* screen. Re-prompting provides the ability to change the original reporting conditions.
	Export	Opens the *Export Options* screen. The screen contains options to extract results into a Microsoft Excel file.
	PDF	Opens the PDF Options screen. The screen contains options to create a version of the report viewable in Adobe Reader.
	Swap Rows and Columns	Switches attributes/metrics from the report’s columns to its rows, and vice versa.
	Toggle Totals	Show/hide totals (or any calculation added using the edit totals feature) from the report grid.
	Edit Totals	Opens the Edit Totals dialog box. These options provide the ability to add one or more of the listed calculations into the report.
	Sort	Opens Sort dialog box. Sorting orientates results in ascending or descending order by up-to-3 attributes/metrics.

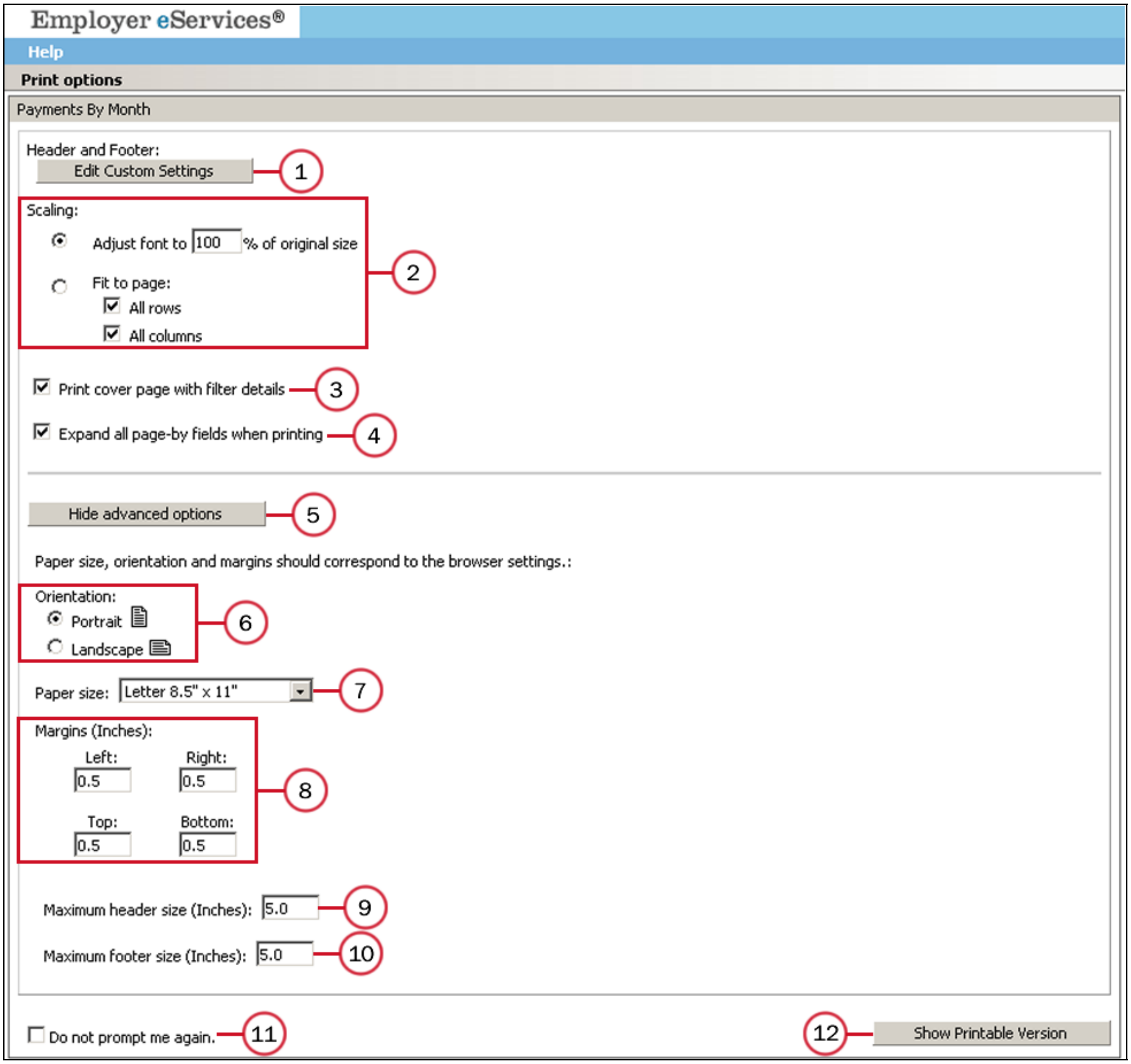
	Drill	Opens/closes the *Drill* panel. Drilling digs beneath the initial results to identify underlying details, or generalize your answer set by regrouping results into broader categories. The “Advanced Drill” option provides the power to add more details to your report. This feature is only available to customers with Expanded services.
	Grid	Displays results in a table.
	Graph	Displays results in a bar graph.
	Grid and Graph	Displays results in both a table and bar graph.
(Custom)	Style	Provides various pre-set styles that alter a grid's color and font schema.
	Banding	Highlights every other row in a report grid to visually separate rows of data.
	Outline	Stratifies information contained in a grid by creating levels by which the report can be viewed separately.
	Thresholds	Toggles threshold amounts on the report between a visual alert system and the actual calculated amount.
	Attribute Forms	Reveals the actual names of attributes merged to appear under a single heading in the report grid.
	Merge Column Headers	Creates a single cell for items that are listed repeatedly across the column headings.
	Merge Row Headers	Creates a single cell for items that appear listed repeatedly across the row headings.
	Lock Column Headers	Keeps the report's headings onscreen while you scroll vertically through results.
	Lock Row Headers	Keeps the values in the leading row onscreen while you scroll horizontally through results.
	Page-by Axis	Opens/closes the *Page-by* panel. The panel contains tools to view results by each value of a specified attribute. You can also pull all metrics to view results one metric at a time.
	Report Filter	Opens/closes the *Report Filter* panel. The panel contains a summary of the conditions used to run the report.

Save Options Screen



1. **Save In** – This field/menu is used to identify the location in which the report will be stored. The location is editable.
2. **Create New Folder** – This button creates a subfolder within the folder specified in the *Save In* field.
3. **Folder Contents** – This area displays the names of reports/subfolders saved in a specified folder.
4. **Name** – This field contains the report's name. The field is editable.
5. **Description** – This field contains a brief definition of the report. The field is editable.
6. **Keep Report Prompted** – This checkbox determines if the report will be saved as a *template* (selected) or as a *static copy* (deselected).
7. **Advanced Options** – This link opens a set of conditions that make it possible to override the system's default *Save* settings.
8. **OK** – This button saves the report based upon the conditions set on this screen.
9. **Cancel** – This button closes the *Save Options* screen without saving the report.

Print Options Screen

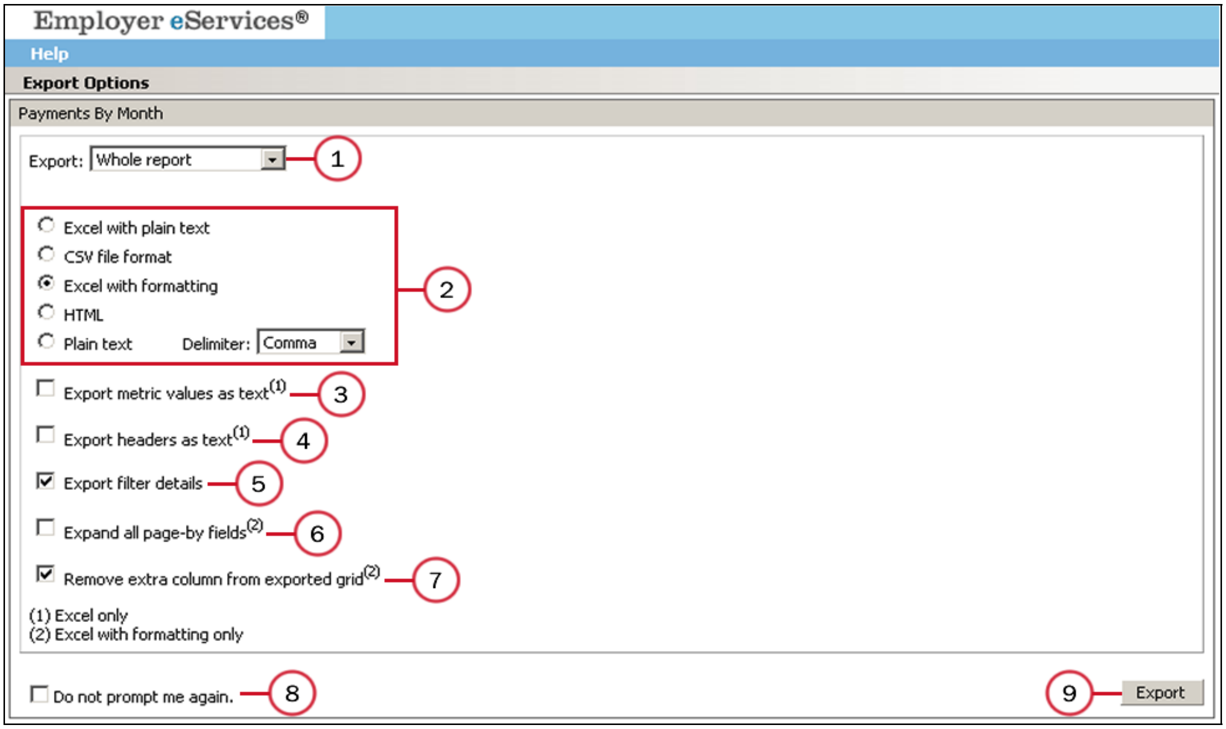


1. **Header and Footer** – This option contains a tool to modify content in the header and footer. Click *Edit Custom Settings* to open the utility.
2. **Scaling** – These options adjust the PDF's font size in order to fit the paper size.
3. **Print Cover Page with Filter Details** – When selected, this option includes a report's filter details in the exported file's output. *Filter Details* include any limits applied to a report's data..
4. **Expand all Page-by Fields when Printing** – When selected, this option includes all iterations of a report's *page-by* selections. If not selected, only the iteration currently displayed appears in the printable file. This option only appears when a *page-by* selection is made.

Print Options Screen continued

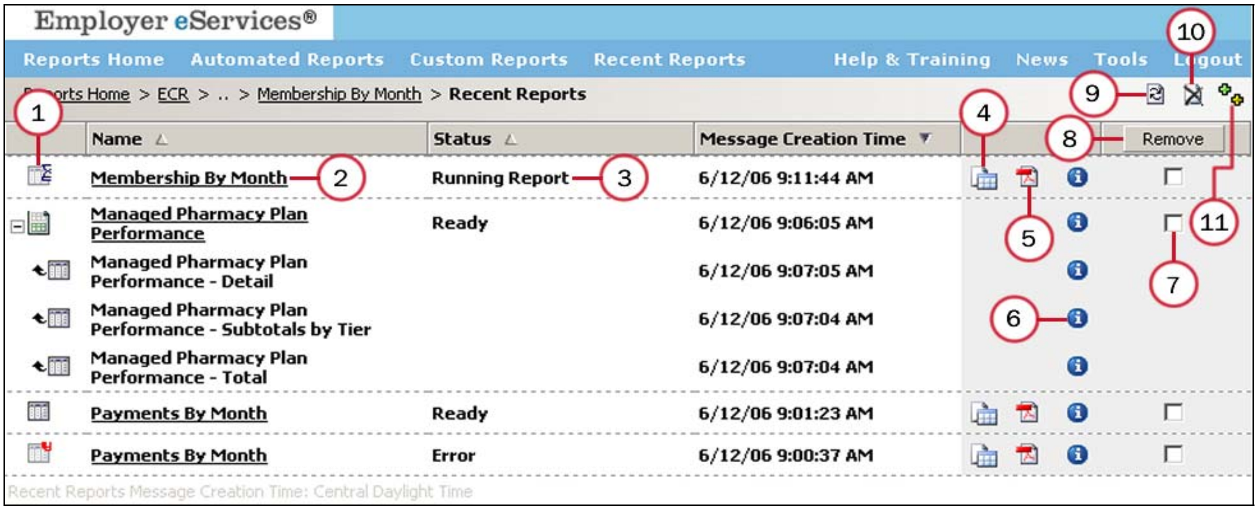
5. **Show/Hide Advanced Options** – This button alternately shows/hides options print options 6-10.
6. **Orientation** – This option sets the manner in which the report is oriented on the printed page.
7. **Paper Size** – This option sets the size of the paper on which the report is printed.
8. **Margins** – This option sets the amount of white space between an edge of the paper (left, right, top and bottom) and the printed content.
9. **Maximum Header Size (inches)** – This option sets the maximum amount of space, below the top margin, devoted to any header content.
10. **Maximum Footer Size (inches)** – This option sets the maximum amount of space, above the bottom margin, devoted to any footer content.
11. **Do Not Prompt Me Again** – This checkbox provides the option to set the options selected from this screen as the default options for printing a report.
12. **Show Printable Version** – This button opens a printable version of the report in a browser window.

Export Options Screen



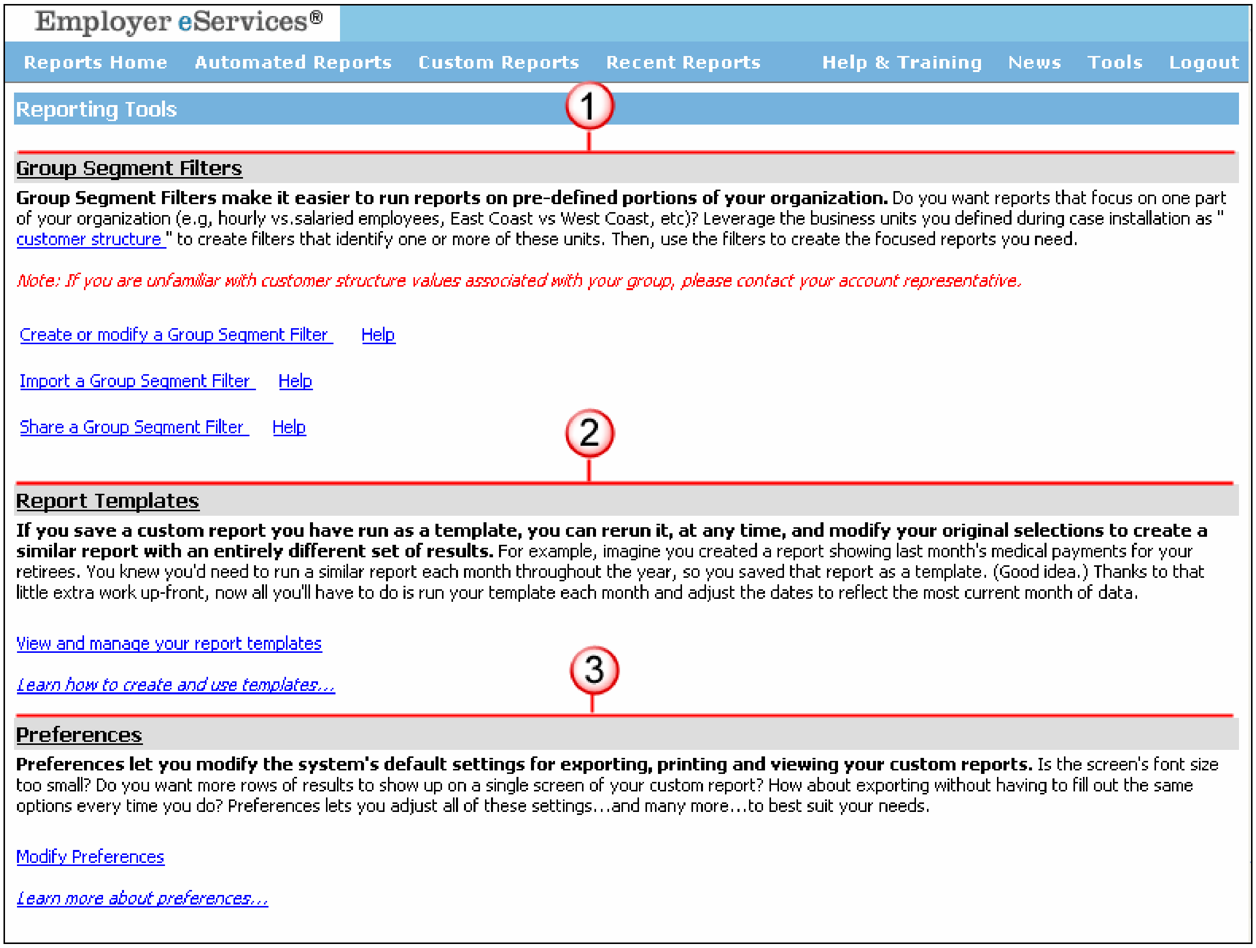
1. **Export** – This menu determines the portion of the report that will be exported.
   - Whole Report
   - Portion Displayed Only
2. **Export Grids To** – These options are used to set the file format into which results are converted.
3. **Export Metric Values As Text** – This checkbox provides the option to format metric values (i.e., calculated results) as text for reports exported to Excel.
4. **Export Headers As Text** – This checkbox provides the option to format the contents of a report's headers as text for reports exported to Excel.
5. **Export Filter Details** – This checkbox provides the option to include a report's filter details in the output of your exported file. *Filter Details* include any limits applied to the report's data.
6. **Expand All Page-by Fields** – When selected, this option includes all iterations of a report's *page-by* selections. If not selected, only the iteration currently displayed appears in the exported file. This option only appears when a *page-by* selection is made.
7. **Remove Extra Column From Exported Grid** – This checkbox provides the option to automatically strip excess columns from reports exported to Excel with formatting.
8. **Do Not Prompt Me Again** – This checkbox provides the option to set the options selected from this screen as the default options for exporting a report.
9. **Export** – This button initiates the process of exporting the report based upon the options selected from this screen.

Recent Reports Screen



1. **Status Icons** – These icons indicate:
   - Whether the report is comprised of one section of output or multiple sections of output.
   - Whether the report is still processing or has finished processing.
   - Whether the report is ready for viewing after it finished processing, or if a processing error occurred.
2. **Report Links** – These links open the *Results* screen for a specified report.
3. **Status Messages** – These messages indicate a reports current position within the overall processing cycle.
4. **Quick Export** – This button opens the *Export Options* screen for the specified report. The *Export Options* screen contains features to convert the report into a file format suitable for viewing and editing in another software application (e.g., Microsoft Excel).
5. **Quick PDF** – This button opens the *PDF Options* screen for the specified report. The *PDF Options* screen contains features to convert the report into a file format suitable for viewing in Adobe Reader.
6. **Report Details** – This button opens the *Report Details* screen for the specified. The *Report Details* screen references the conditions used to run the report and produce its results.
7. **Remove checkbox** – These checkboxes provide a means to manually select reports for removal from this list. Works in conjunction with the *Remove* button.
8. **Remove button** – This button deletes reports selected to be removed from this list. Works in conjunction with the *Remove* checkboxes.
9. **Refresh** – This button updates the status of all reports in this list.
10. **Clear All** – This button clears all reports from this list. Confirmation is required before reports are deleted.
11. **Show/Hide Child Reports** – This button reveals information regarding each section of a compound report—including each section's processing status.

Reporting Tools Screen



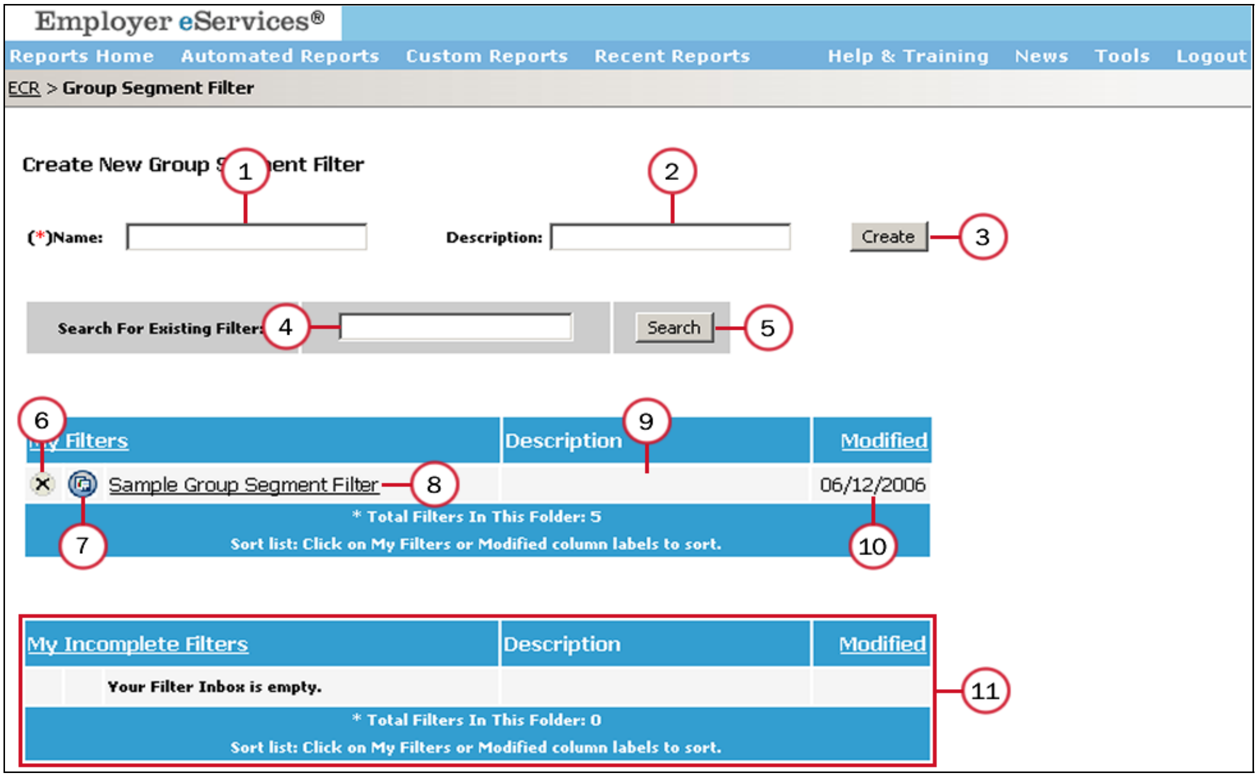
1. **Create a Group Segment Filter** – This section of the *Reporting Tools* screen provides access to an editor for creating and managing *Group Segment Filters*. Typically, *Group Segment Filters* identify one or more discrete business units within an overall policy/group.
   Import a Group Segment Filter – This page allows users to Import a *Group Segment Filter* by filling out a predefined Excel template (.xls).

   Share a Group Segment Filter – This page allows users to Share a *Group Segment Filter* with another eCR user.

2. **Manage Report Templates** – This section of the *Reporting Tools* screen provides access to a portion of the reporting application that stores saved custom report. If a custom report is saved as a template, it maintains all the option selections made when the report was originally run. The template can be reused, and its option selections modified, to create similar reports with an entirely different set of results.

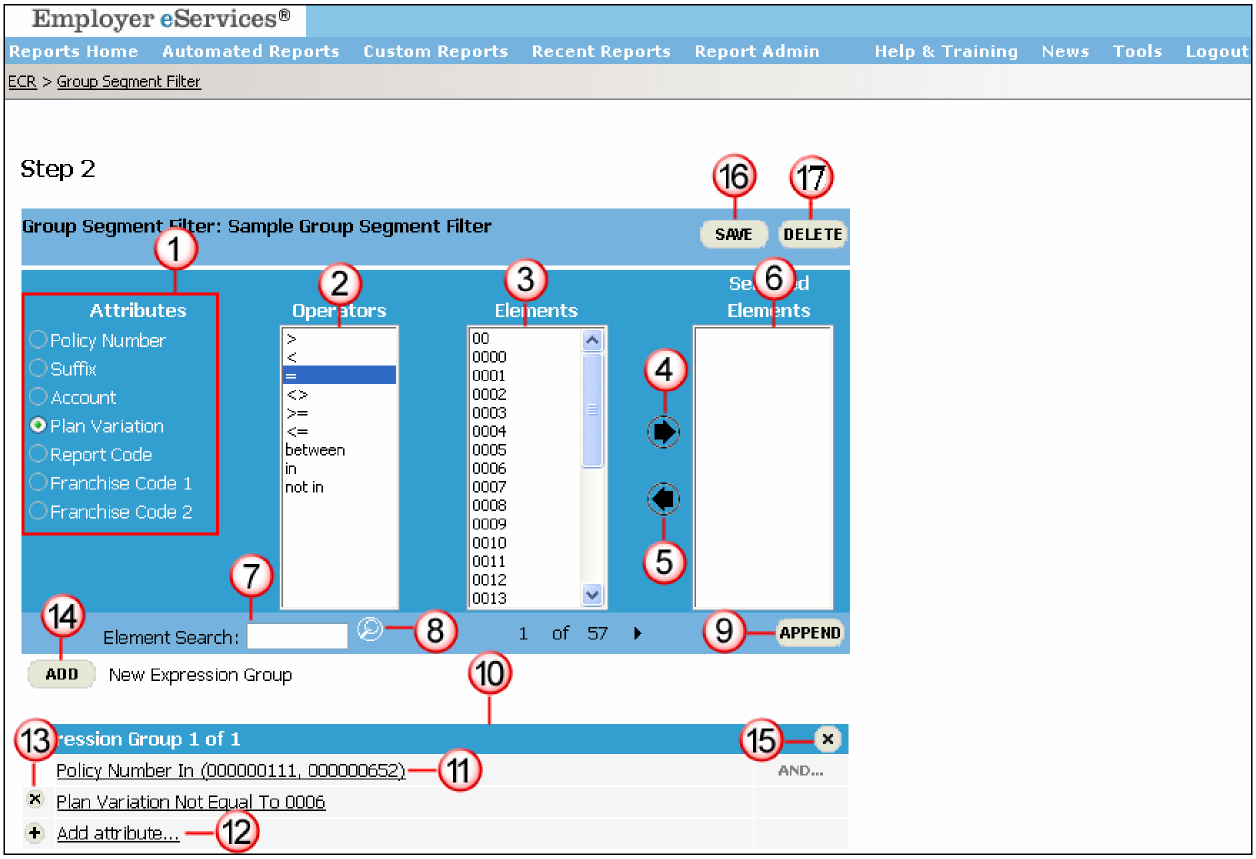
3. **Set Preferences** – This section of the screen contains a link to a tool for modifying the default or existing settings for several categories of reporting features. The changes can be applied to all reports or limited to the current report.

Group Segment Filters- Screen 1



1. **Name** – This field is used to enter a name for a new *Group Segment Filter*.
2. **Description** – This field is best used to enter a summary of the conditions used to identify the *Group Segment Filter's* population.
3. **Create** – This button opens a screen that contains the tools for defining a segment of the population.
4. **Search field** – This field provides a means to locate a filter within the list of *My Filters*. Type the partial or full name of the item into the *Search* field. The field works in conjunction with the *Search* button.
5. **Search button** – This button implements a look-up of the item entered into the *Search* field.
6. **Delete** – This button deletes the specified filter from the table.
7. **Copy** – This button opens a screen to rename and describe the filter. All the conditions used to define the population of the original filter are maintained in a renamed copy.
8. **Edit** – This button opens a screen containing the conditions set for this filter. Any of those conditions can be changed to alter the population defined by this filter.
9. **Description** – The description listed here is the one entered when the filter was created.
10. **Modified Date** – This date indicates when the filter was initially created or last edited.
11. **My Incomplete Filters** – This table lists *Group Segment Filters* that require further input.

Group Segment Filters- Screen 2

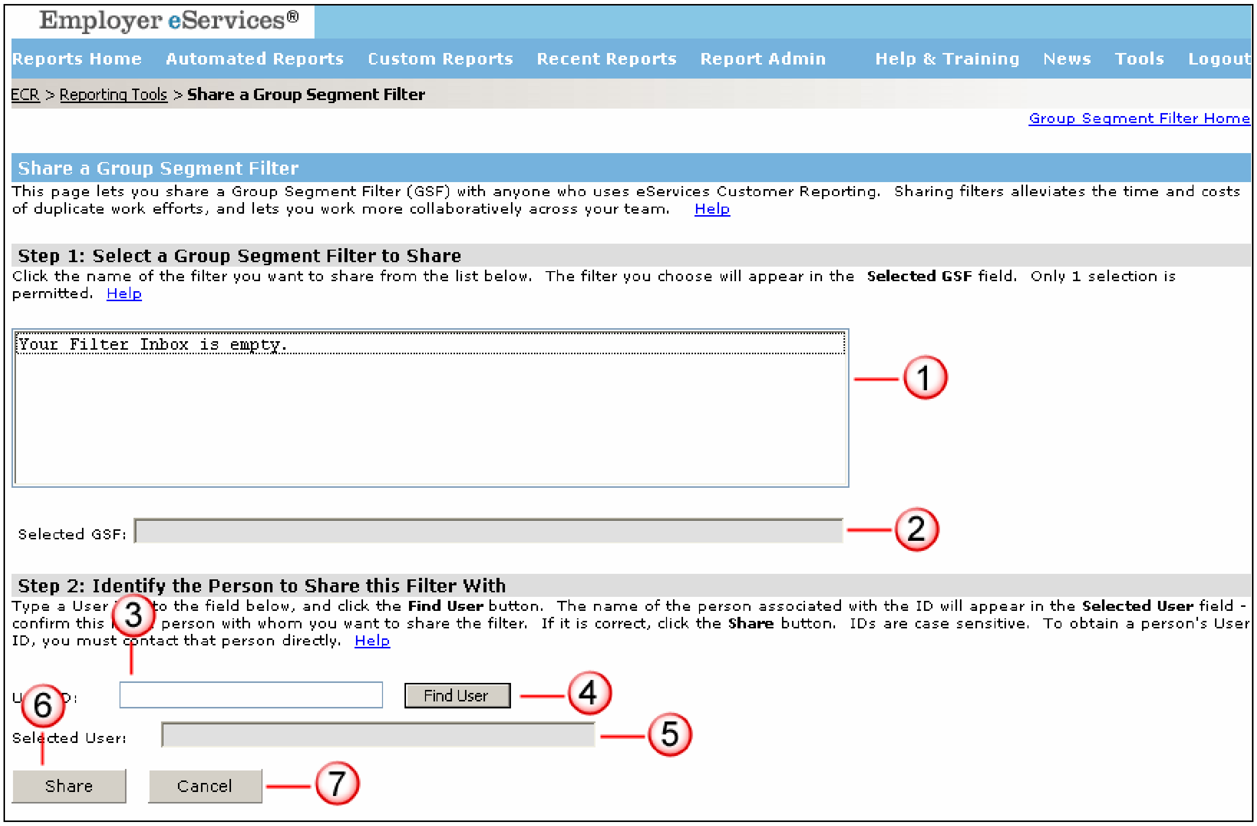


1. **Attributes** – These radio buttons reflect the various levels of customer structure from which expressions are built.
2. **Operators** – An operator is a mathematical function. It creates the logical connection between an *attribute* and its *selected elements* to form an expression.
3. **Elements** – This field lists all values associated with a specified attribute.
4. **Add to Selections** – This button moves highlighted items from the *Elements* field into the *Selected Elements* field.
5. **Deselect** – This button moves highlighted items from the *Selected Elements* field back into the *Elements* field.
6. **Selected Elements** – This field lists elements picked for this expression.
7. **Search field** – This field provides a means to locate an item within the list of *Elements*. Type the partial or full name of the item into the *Search* field. The field works in conjunction with the *Search* button.
8. **Search button** – This button implements a look-up of the item entered into the *Search* field.

Group Segment Filters- Screen 2 continued

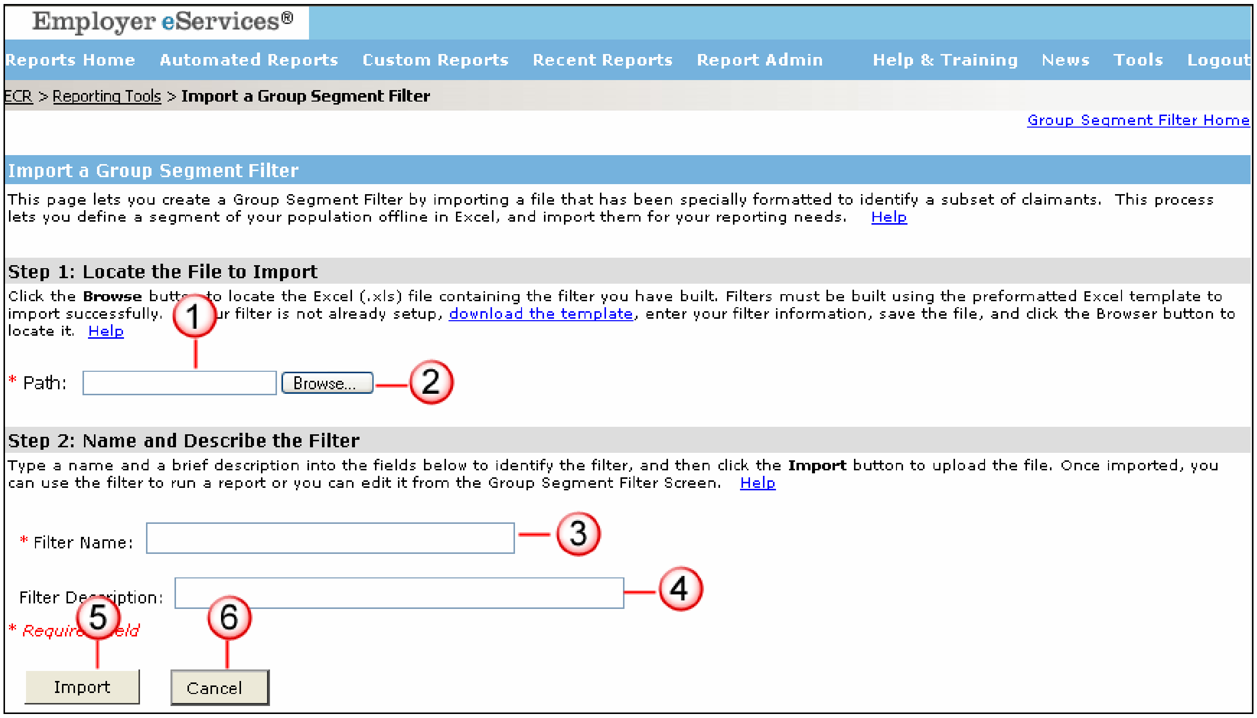
9. **Append** – This button finalizes the current *expression* and adds it to an *Expression Group*.
10. **Expression Group** – An *Expression Group* consists of one or more *expressions*. The first expression listed within the group must identify a *Policy Number*.
11. **Expression** – An *expression* defines an identifiable portion of the population. It is comprised of an attribute, an operator, and one or more elements.
12. **Add Attribute** – This button/link enables another *attribute* to be added to the *Expression Group*.
13. **Delete Expression** – This button removes a specified *expression* from the *Expression Group*.
14. **Add New Expression Group** – This button opens another *Expression Group*. This feature is useful for creating a filter for multiple subsets of a policy/group.
15. **Delete Expression Group** – This button removes the *Expression Group* from the filter.
16. **Save Group Segment Filter** –This button finalizes the filter based upon the conditions set on this screen.
17. **Cancel** – This button closes this screen without implementing any changes to the filter.

Sharing Group Segment Filters



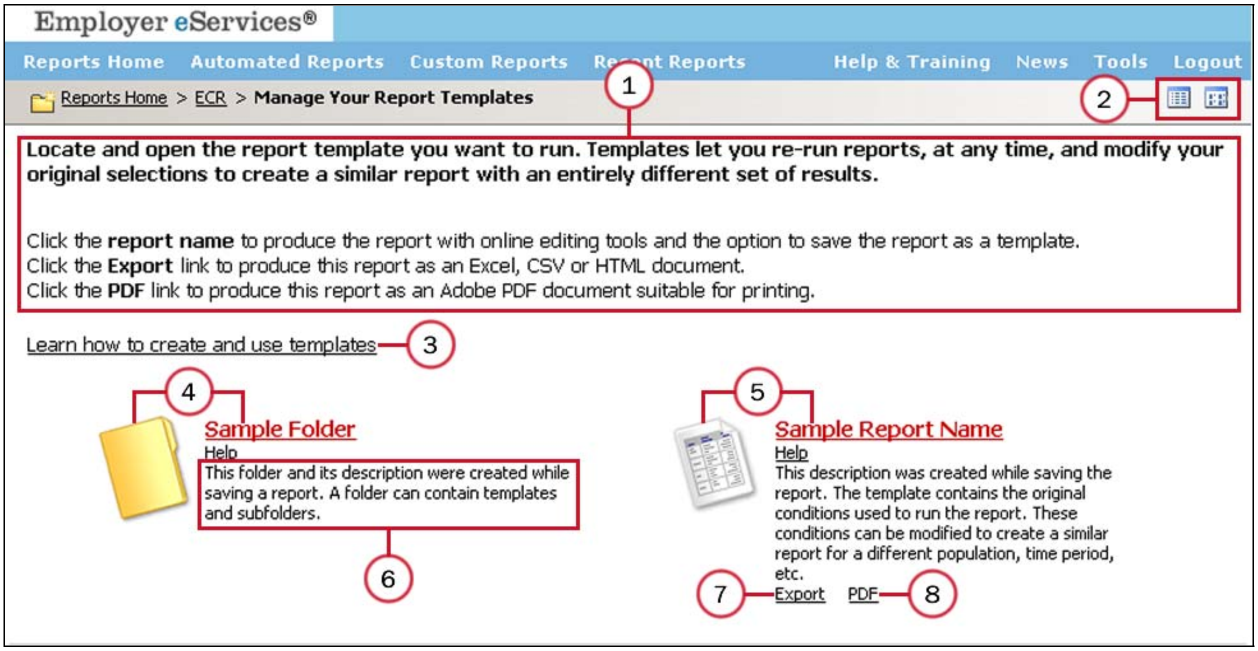
1. **Filter Inbox** – The filter inbox lists all of your available filters.
2. **Selected GSF**– This field shows the filter you have selected to share.
3. **User ID**– In this field you will enter the User ID of the person you want to share a filter with.
4. **Find User**– This button will find the user based on the User ID you entered.
5. **Selected User**– This field will display the name of the user associated with the User ID.
6. **Share**– This button will share the filter with the selected user.
7. **Cancel**– This button will cancel the Share Group Segment Filter process.

Importing Segment Filters



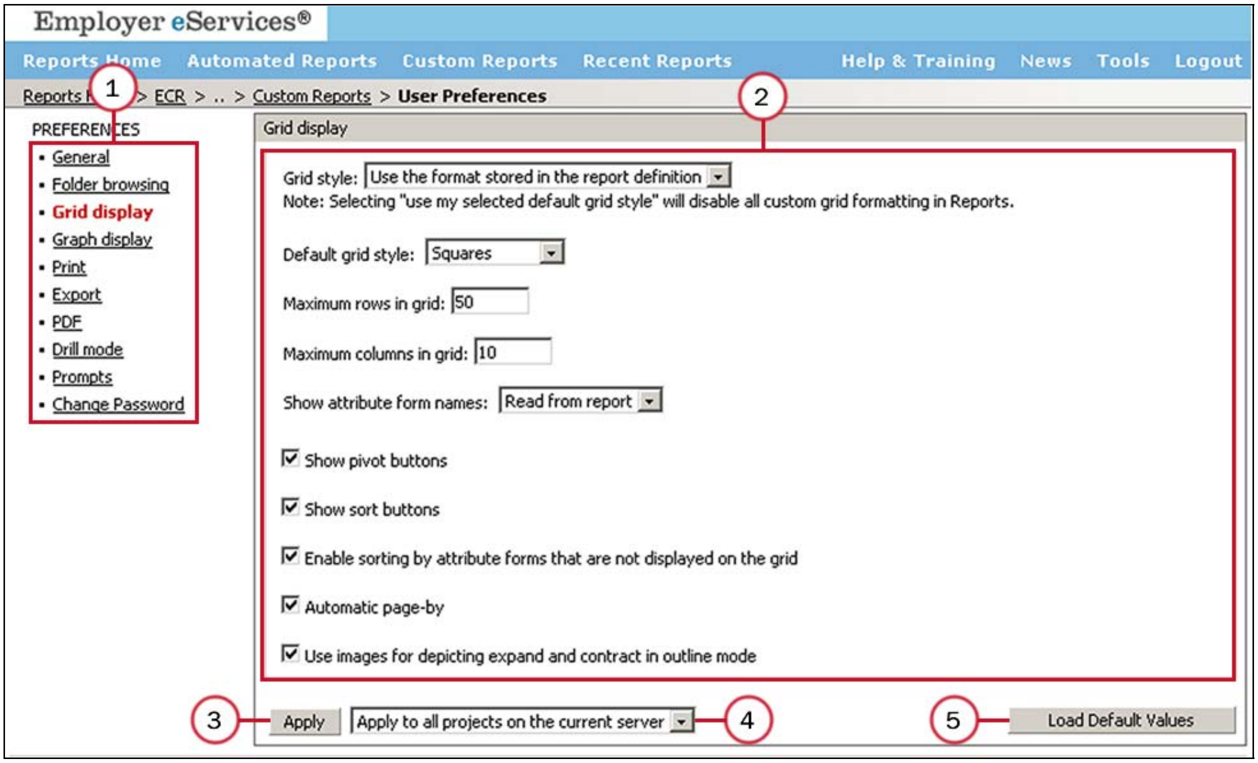
1. **Path** – In this field type in the path to the Excel (.xls) file containing the filter you have built or, if you choose the **Browse** button, the path to the Excel (.xls) file containing the filter you have built will show.
2. **Browse** – This button allows you to browse for the Excel (.xls) file containing the filter you have built.
3. **Filter Name** – In this field type in a name for the filter you are importing.
4. **Filter Description** – In this field type in a description for the filter you are importing.
5. **Import** – This button will import the filter you have selected.
6. **Cancel** – This button will cancel the Import Group Segment Filter process.

Manage Report Templates Screen



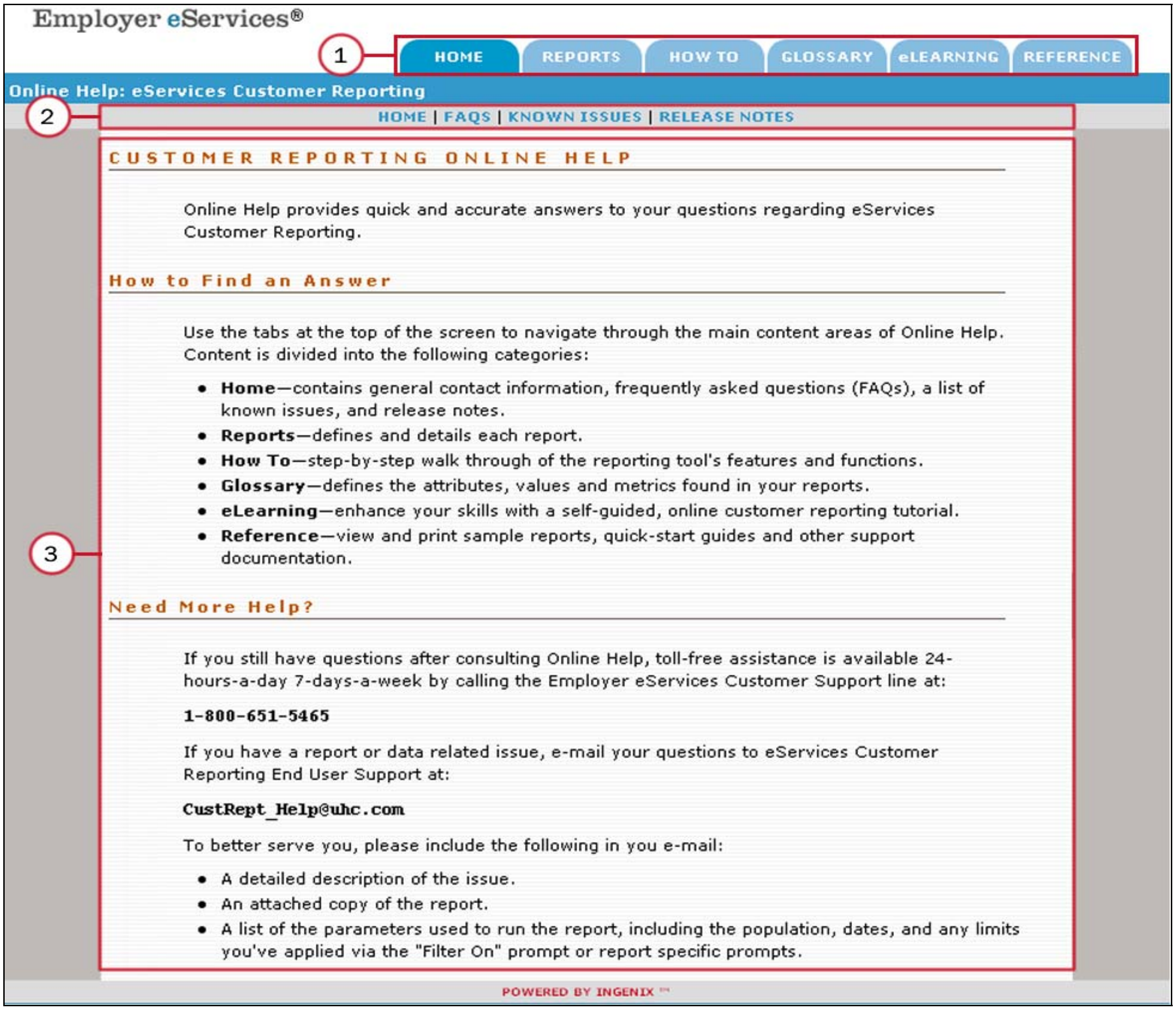
1. **Onscreen Help** – This text summarize the steps needed to select, export, and get more help with report templates reports.
2. **Edit Display** – These icons toggle the screen between displaying content in an icon or list format.
3. **Learn How to Create and Use Template** – Opens *Online Help* for using a template to run a report.
4. **Folders** – These icons/links open the templates and subfolders saved within it. Folders are created while saving a report as a template.
5. **Report Templates** – These icons/links open the option screen for the specified report. The report contains a single section of output. Results are displayed in an online format.
6. **Description** – This text explains the purpose of the specified folder/report.
7. **Quick Export** – The *Export* links open the option screen for the specified template. Results are converted into an .xls (Excel), .csv (comma separated value), .htm (hypertext markup) or .txt (text) file format. All of these file formats are suitable for viewing in Microsoft Excel.
8. **Quick PDF** – The *PDF* links open the option screen for the specified template. Results are converted into a .pdf file. PDF files are suitable for viewing in Adobe Reader.

Preferences Screen



1. **Category links** – These links open the adjustable settings for a specified feature.
2. **Settings** – These are the adjustable conditions for a specified category.
3. **Apply button** – This button implements the settings for the specified category. The scope of this change is determined by the option selected from the *Apply* menu.
4. **Apply menu** – This drop-down menu provides two options for implementing any adjustments made to a category's settings:
   - *To All Projects* – Applies the settings to all existing and future reports.
   - *To Current Project* – Applies the settings to the report presently open.
5. **Load Default Values** – This button reverts all the category's setting to the original selections/amounts.

Online Help



1. **Help Topic tabs** – These tabs open the main page for the specified topic.
   - *Home* – Contains general contact information, frequently asked questions (FAQs), a list of known issues, and release notes.
   - *Reports* – Defines and details each report.
   - *How To* – Provides a step-by-step walk through of the reporting tool's features and functions.
   - *Glossary* – Defines the attributes, values and metrics found in your reports.
   - *eLearning* – Provides ways to enhance your reporting skills with self-guided, online tutorials.
   - *Reference* – Provides access to downloadable support materials.
2. **Secondary Navigation** – These links reference the subtopics available within a chosen *help topic*. The links open *help content* for the specified subtopic.
3. **Help Content** – This area of the screen contains the supporting text for the specified topic.

