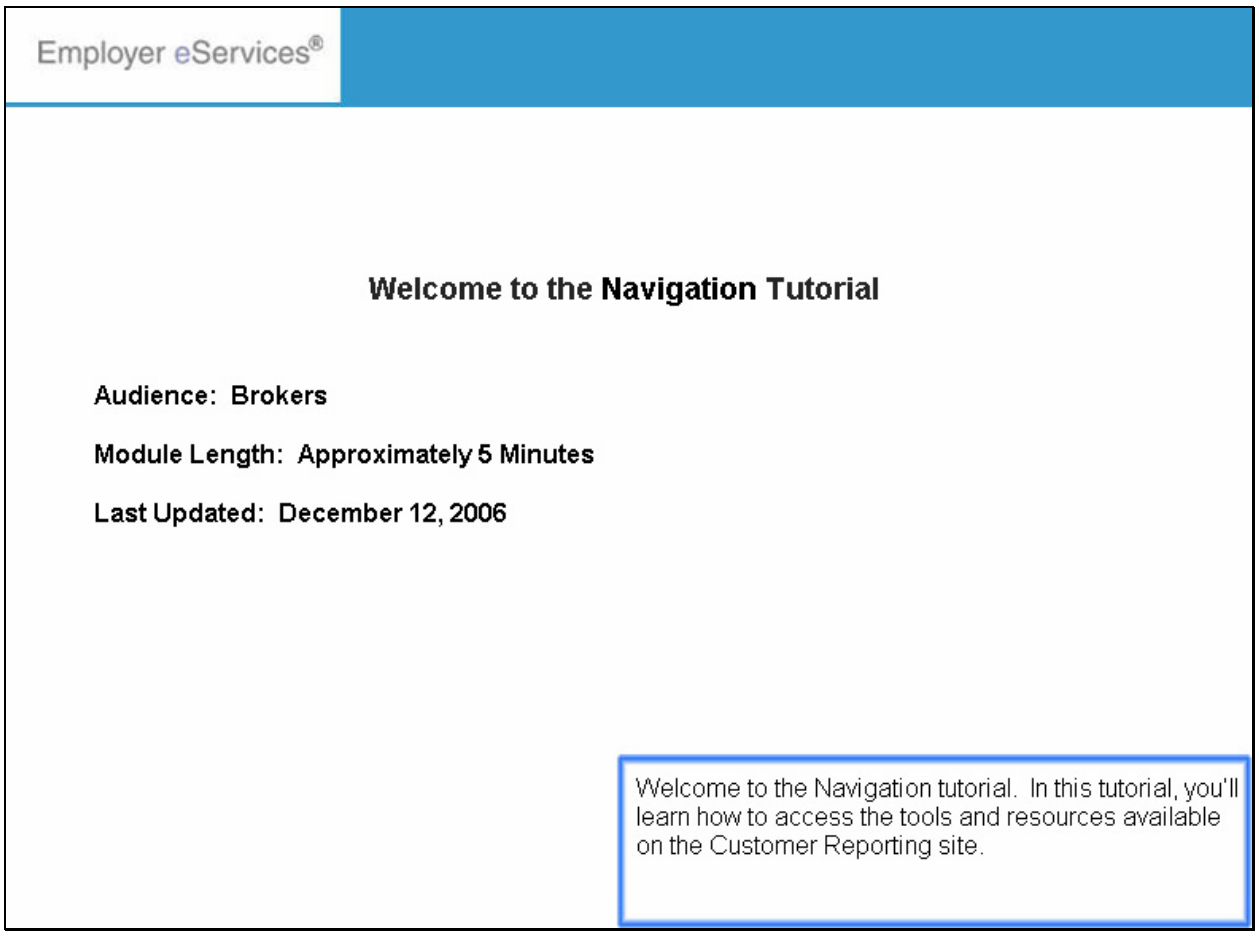

Welcome to the Navigation tutorial. In this tutorial, you'll learn how to access the tools and resources available on the Customer Reporting site.

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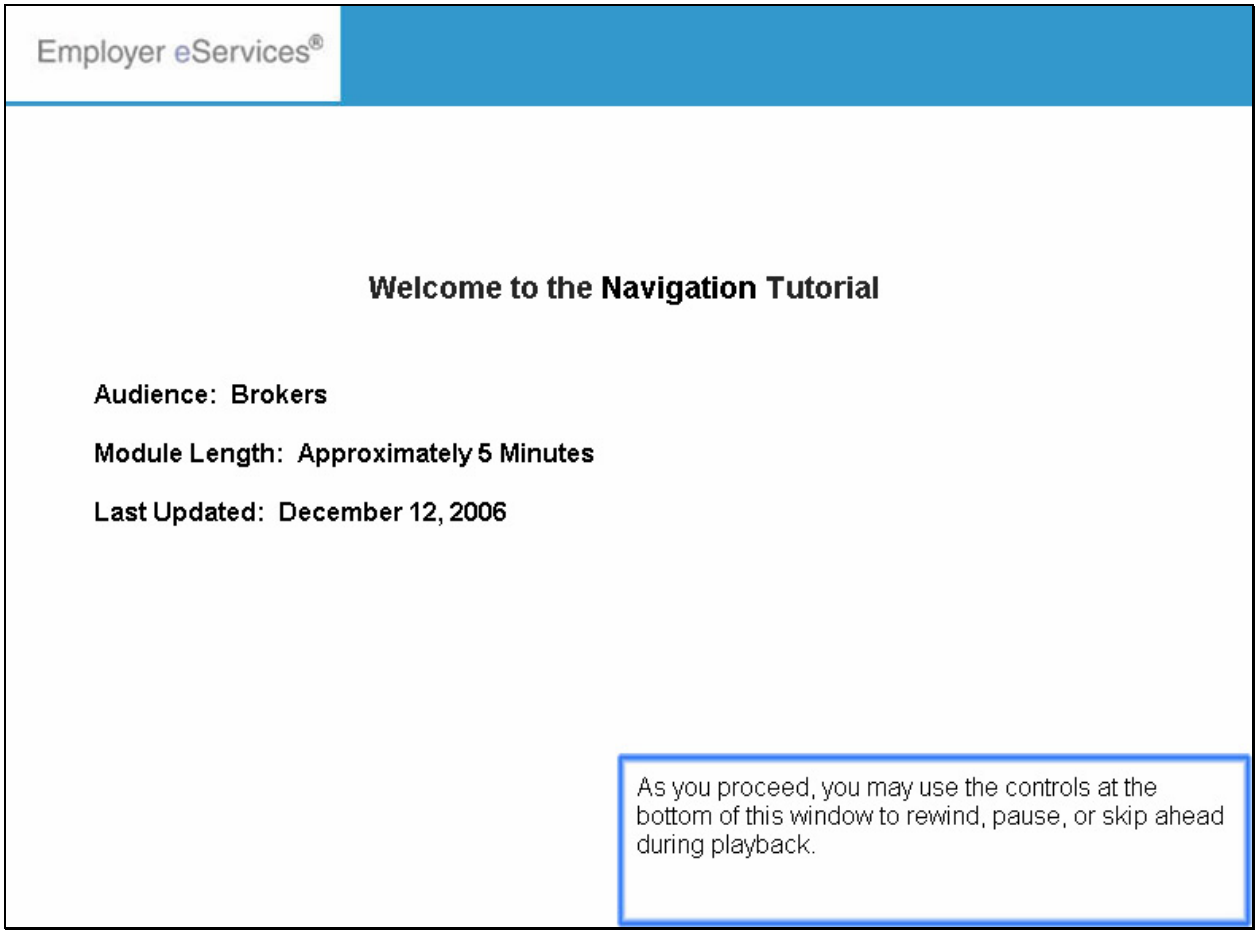

As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback.

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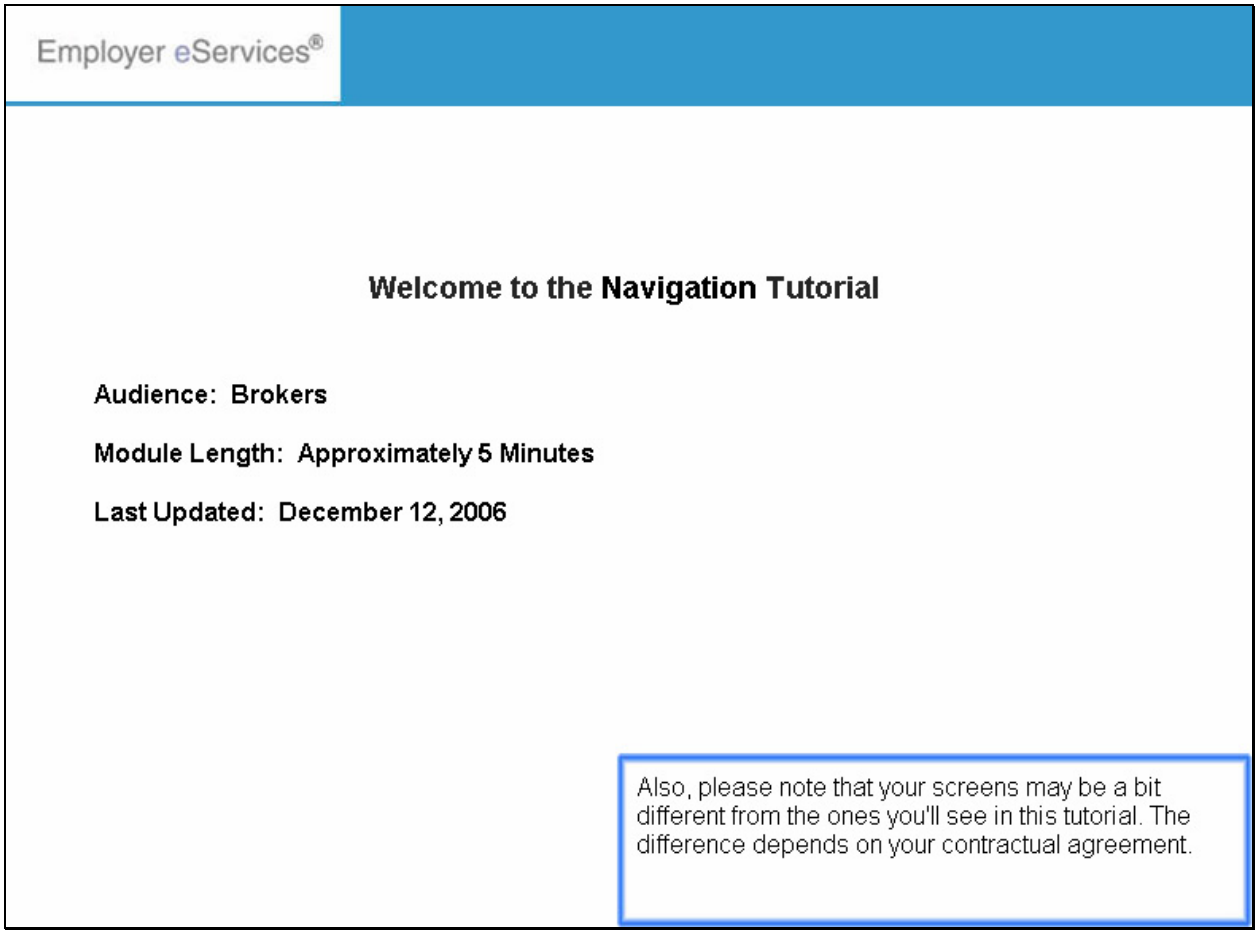

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

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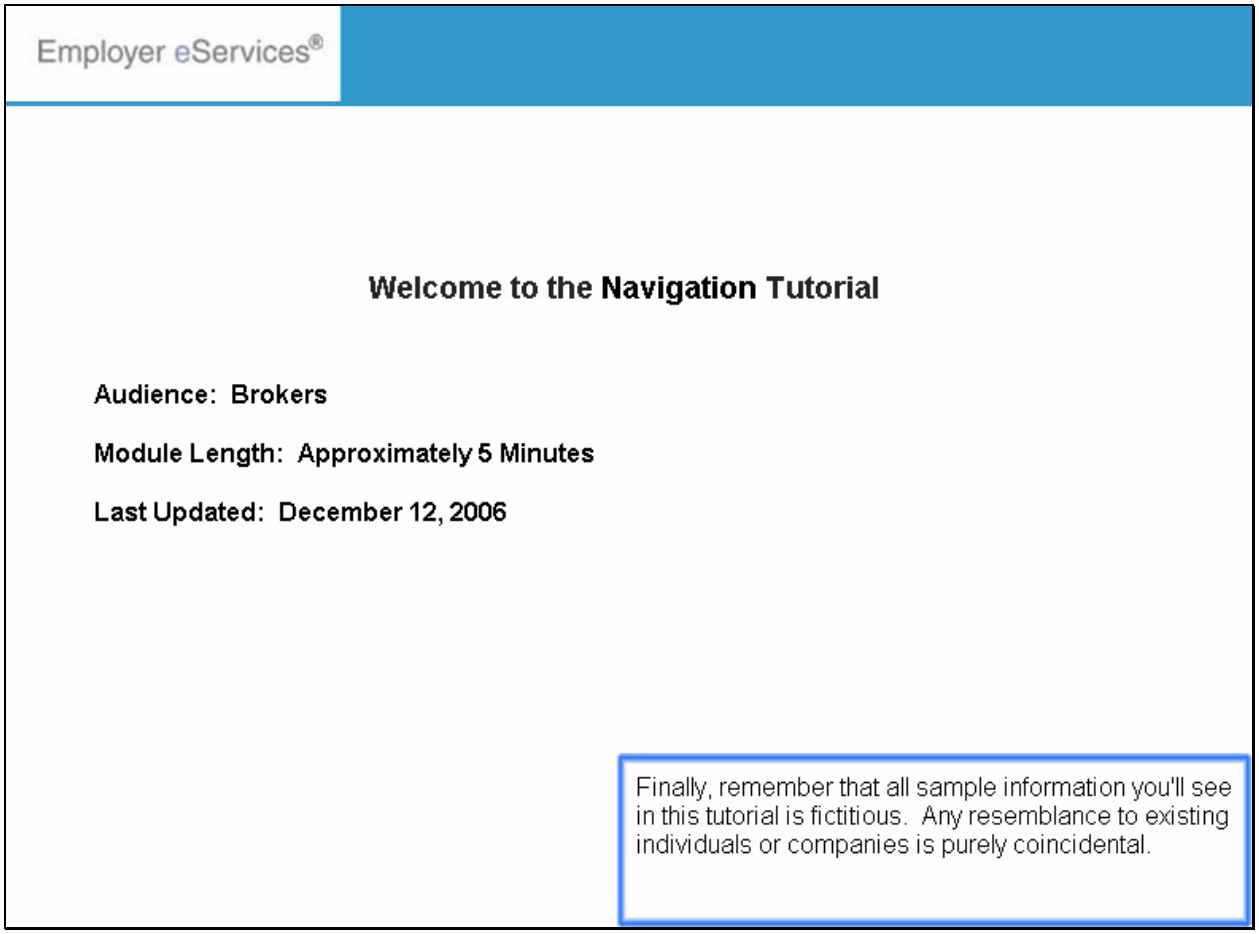

Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

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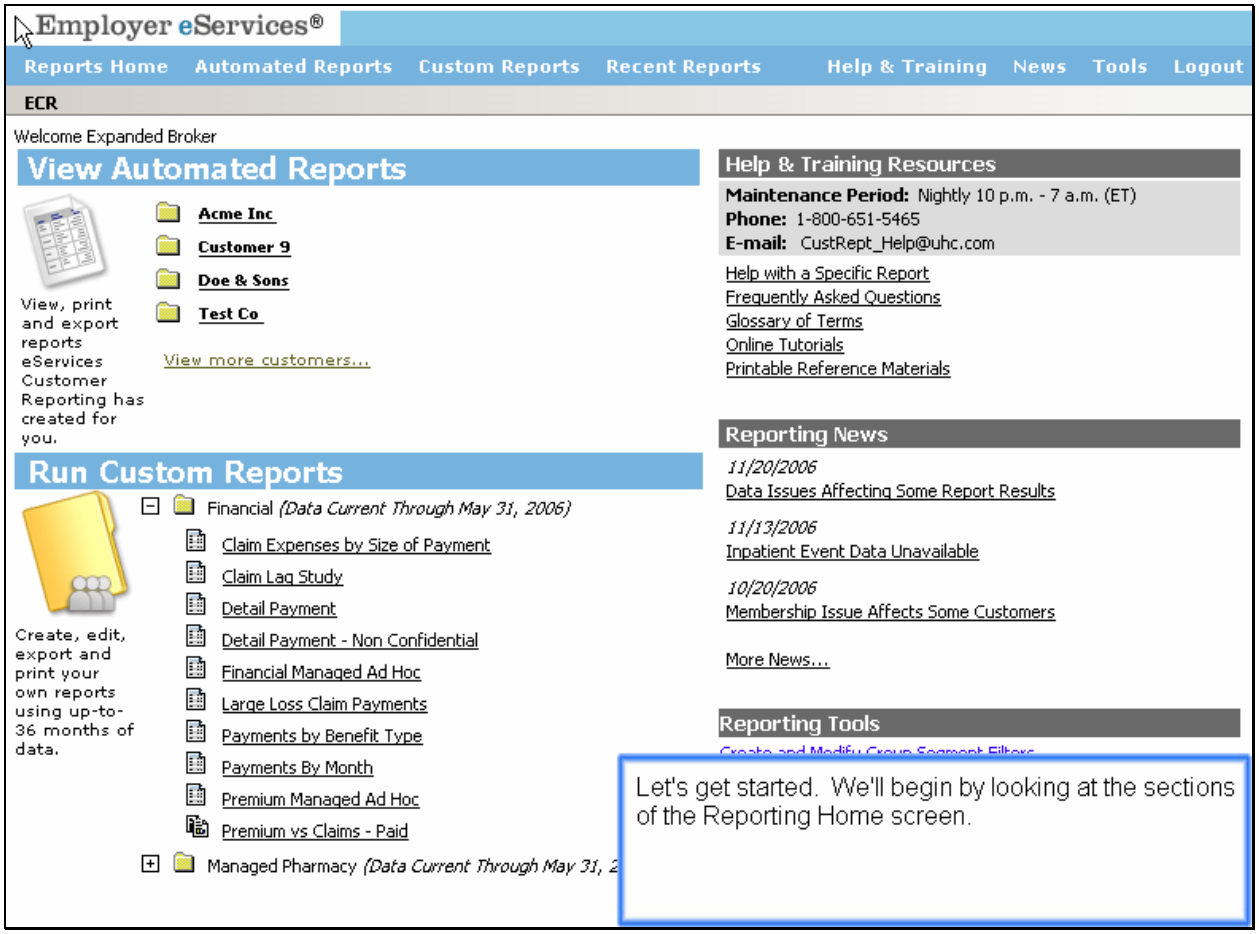

Let's get started. We'll begin by looking at the sections of the Reporting Home screen.

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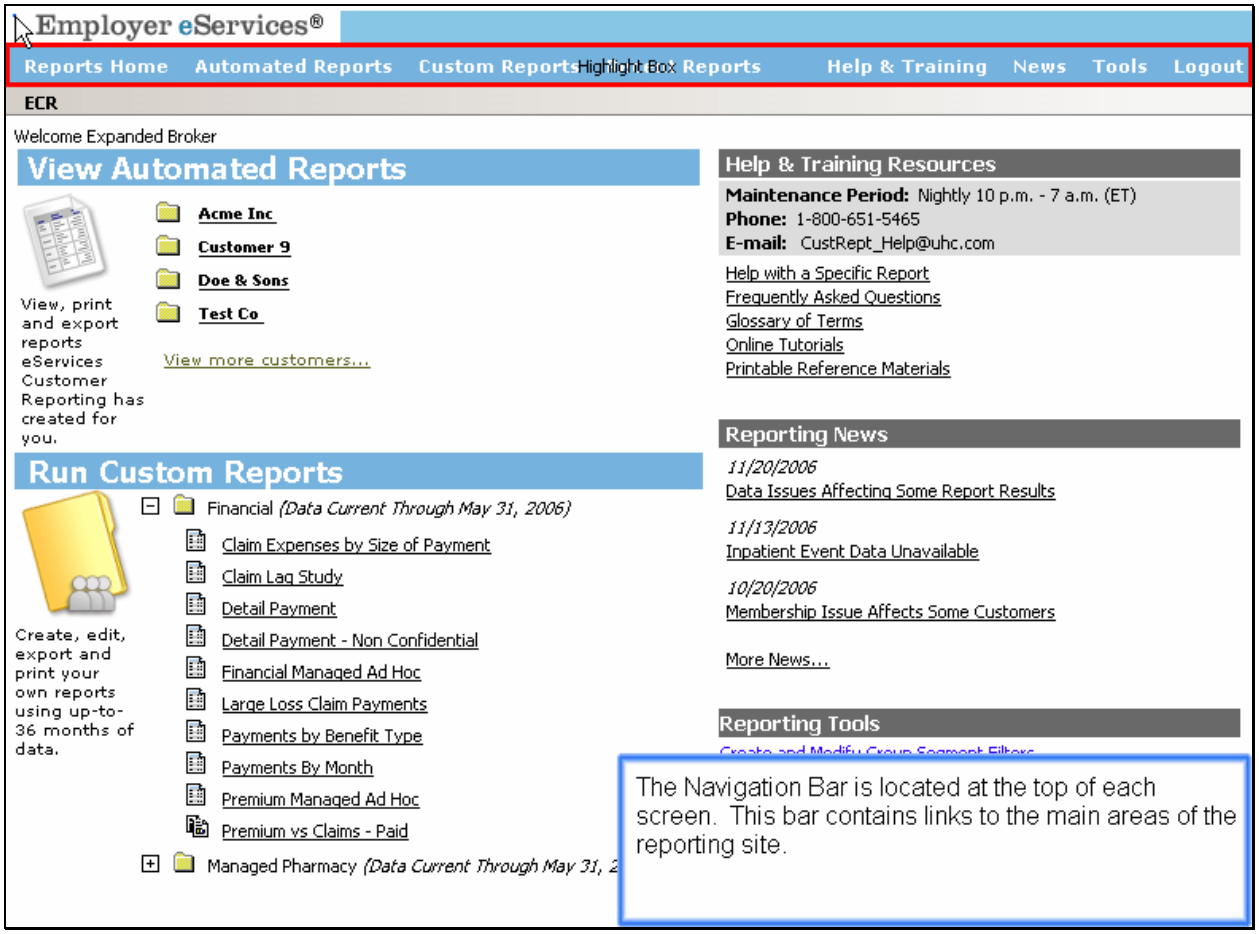

The Navigation Bar is located at the top of each screen. This bar contains links to the main areas of the reporting site.

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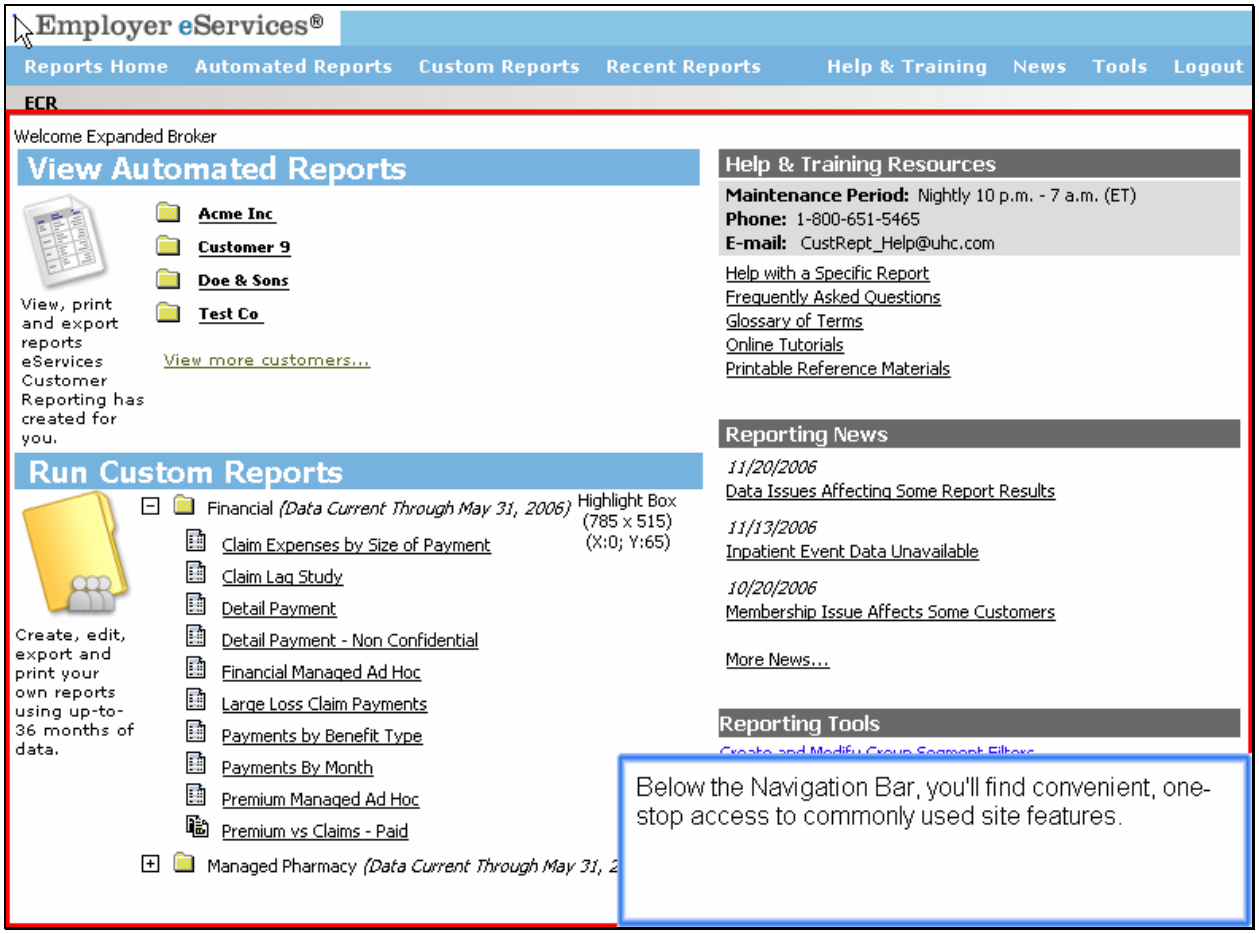

Below the Navigation Bar, you'll find convenient, one-stop access to commonly used site features.

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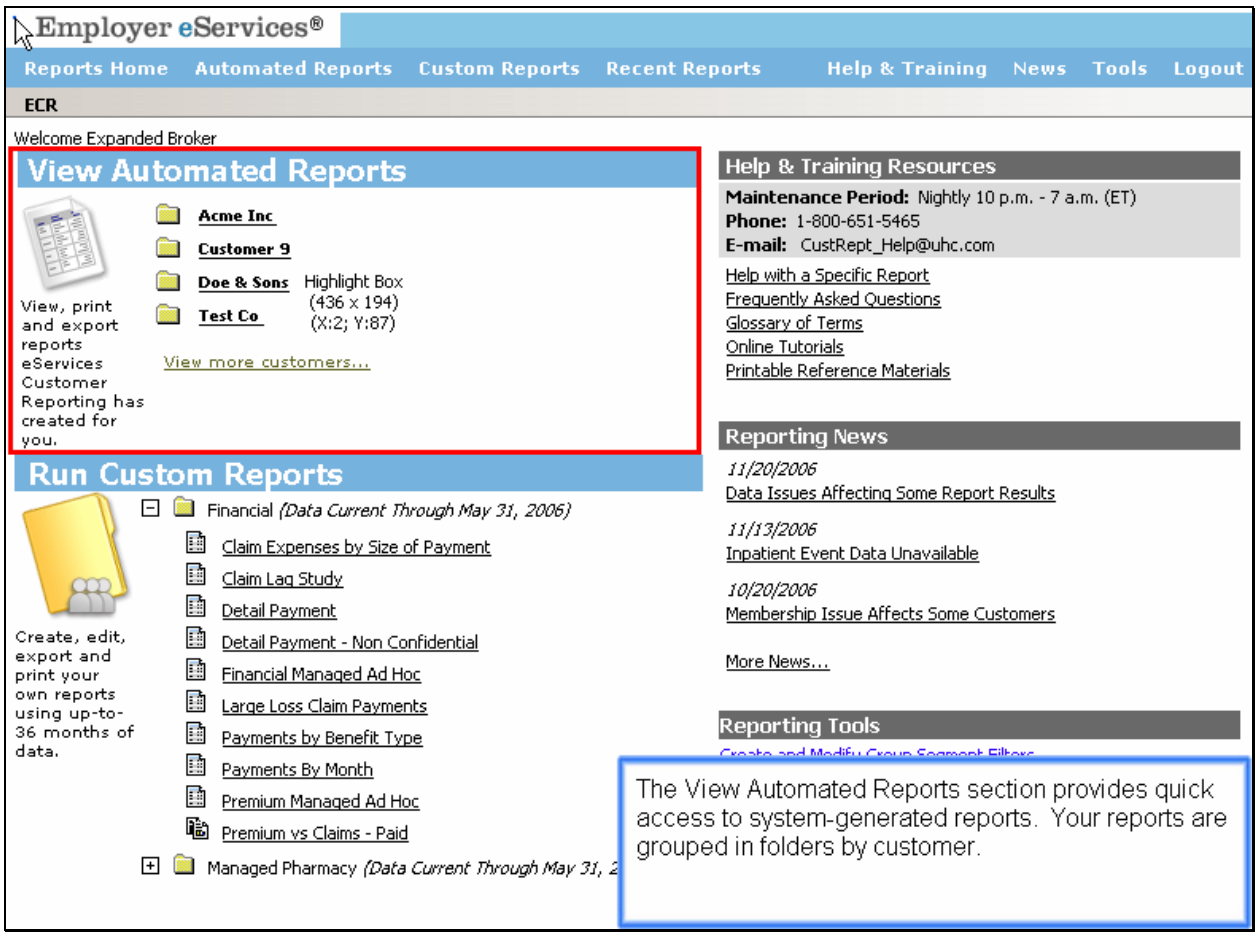

The View Automated Reports section provides quick access to system-generated reports. Your reports are grouped in folders by customer.

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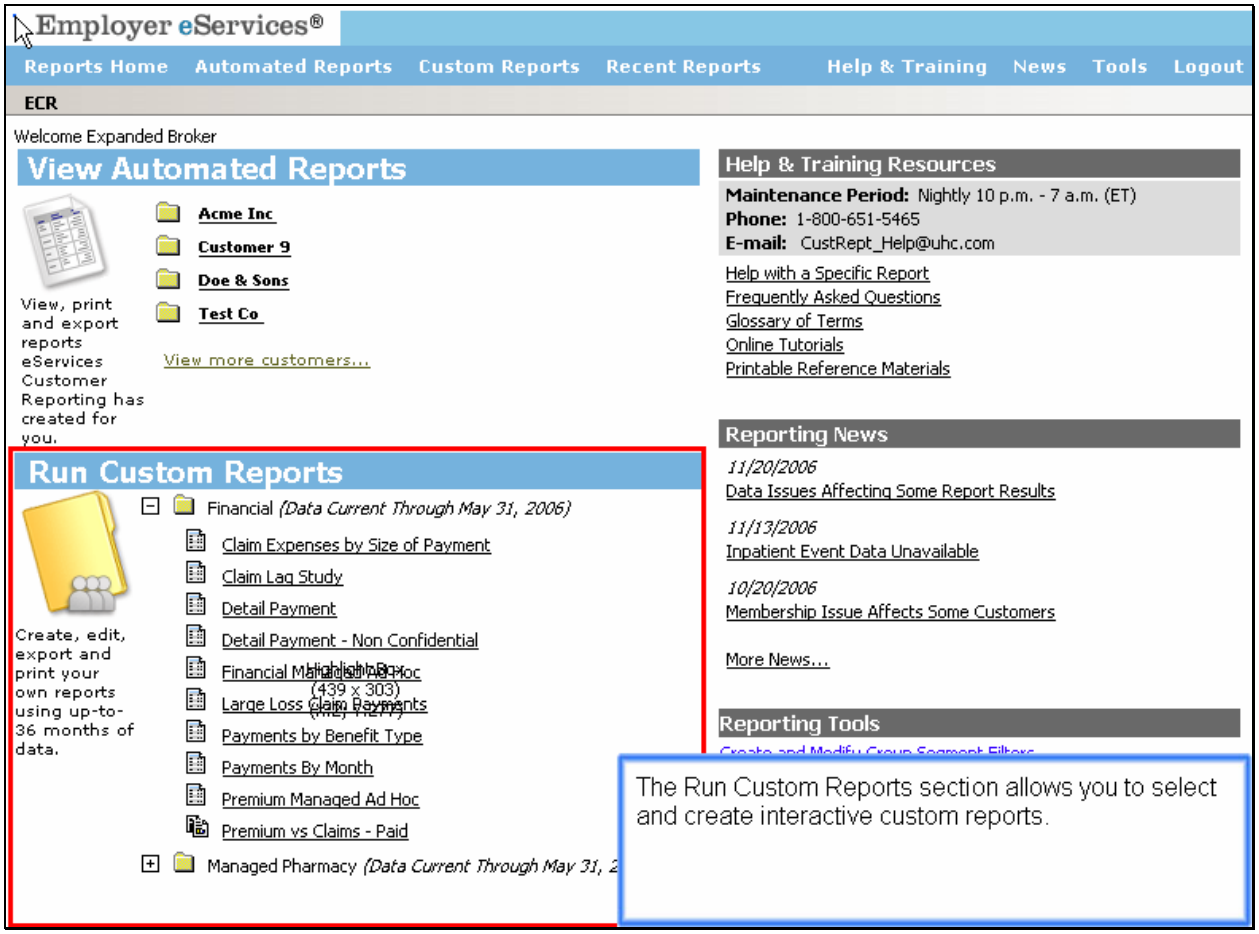

The Run Custom Reports section allows you to select and create interactive custom reports.

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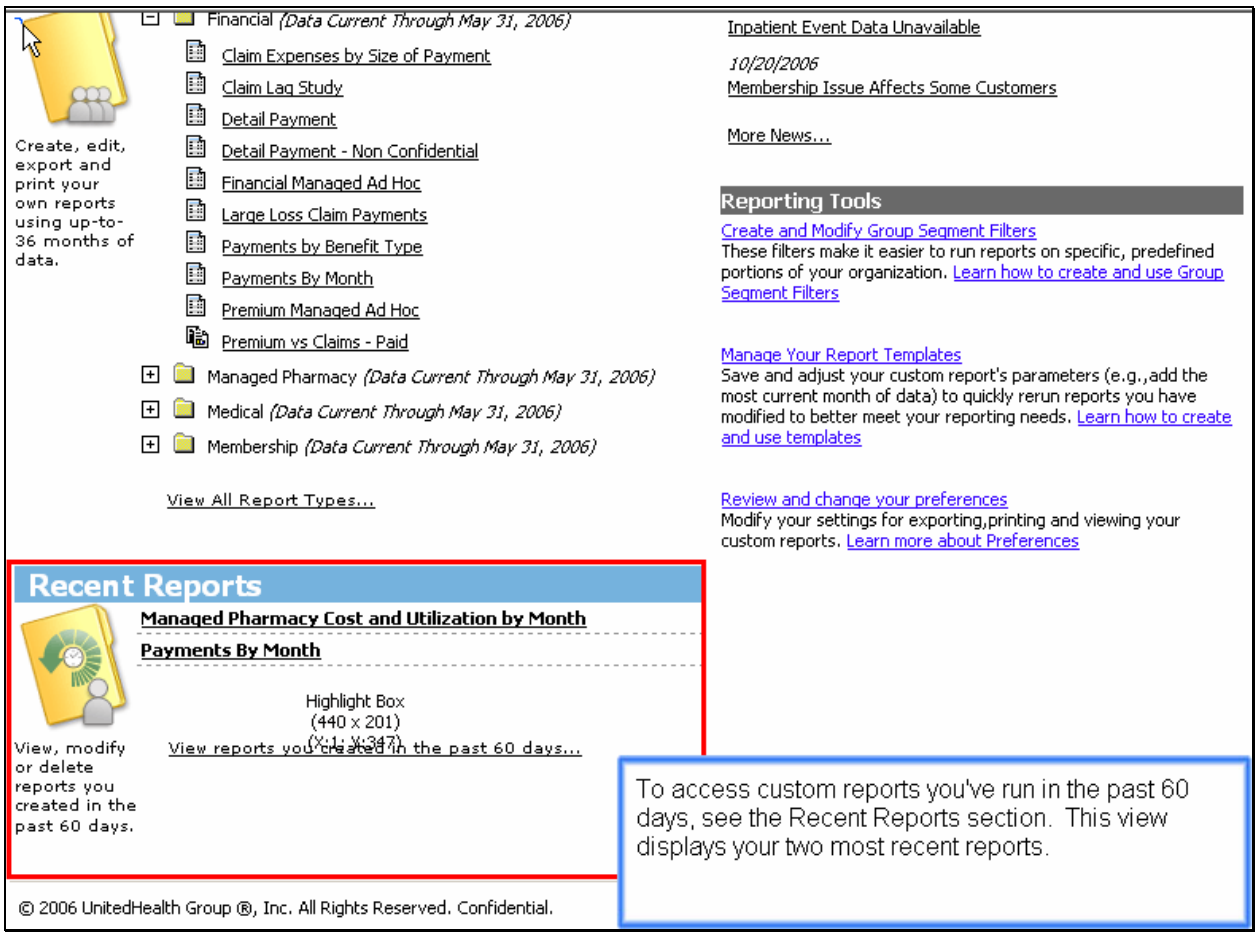

To access custom reports you've run in the past 60 days, see the Recent Reports section. This view displays your two most recent reports.

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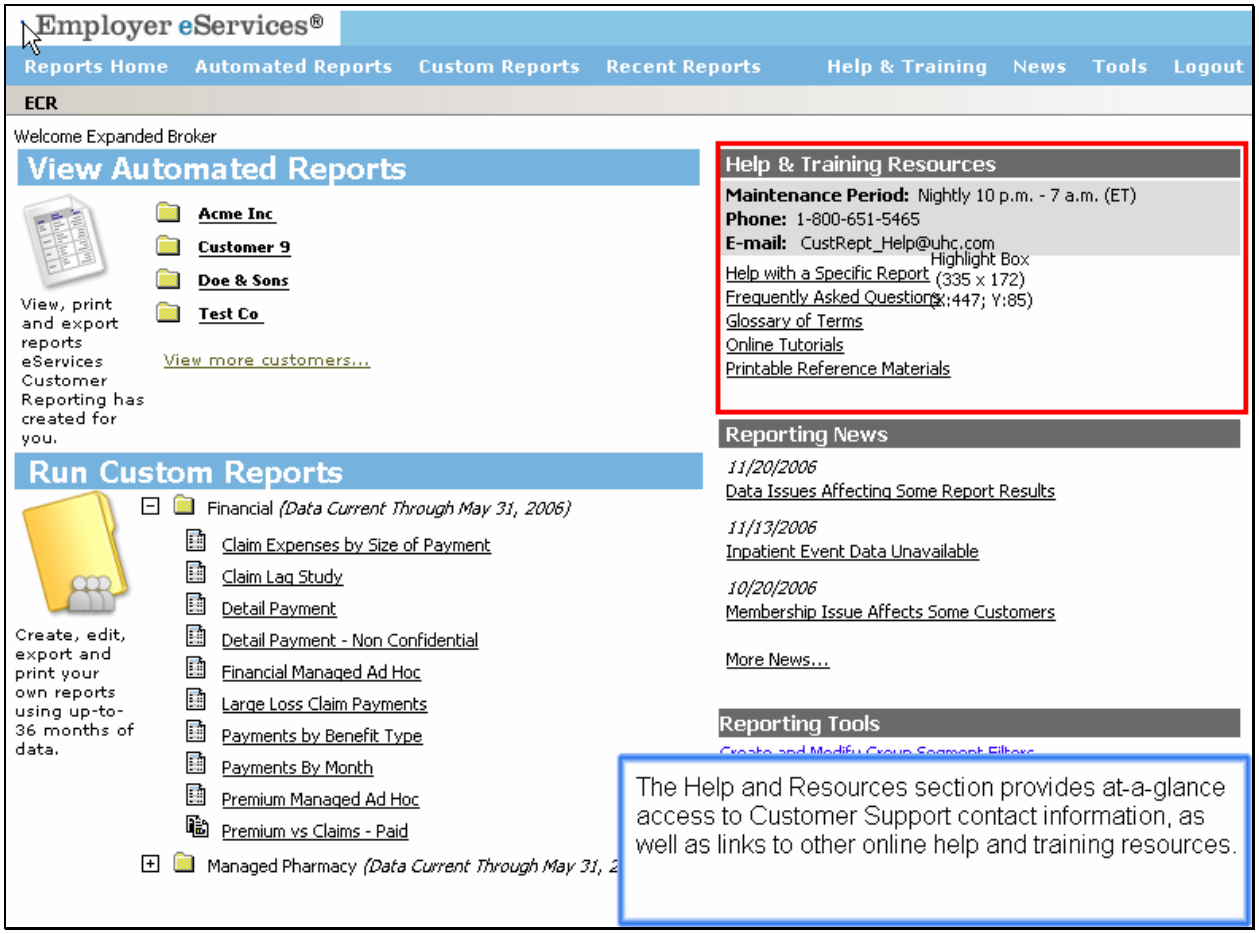

The Help and Resources section provides at-a-glance access to Customer Support contact information, as well as links to other online help and training resources.

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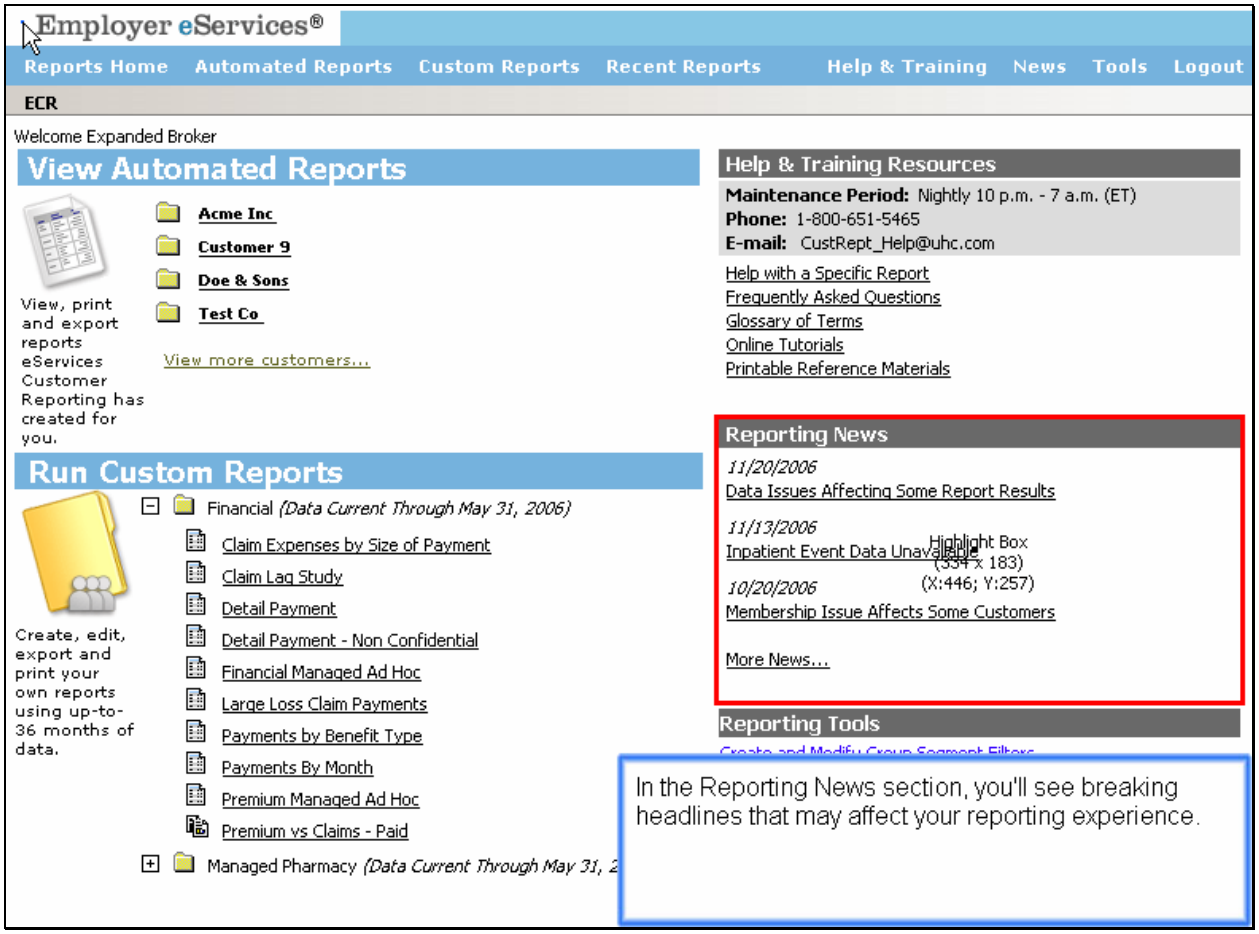

In the Reporting News section, you'll see breaking headlines that may affect your reporting experience.

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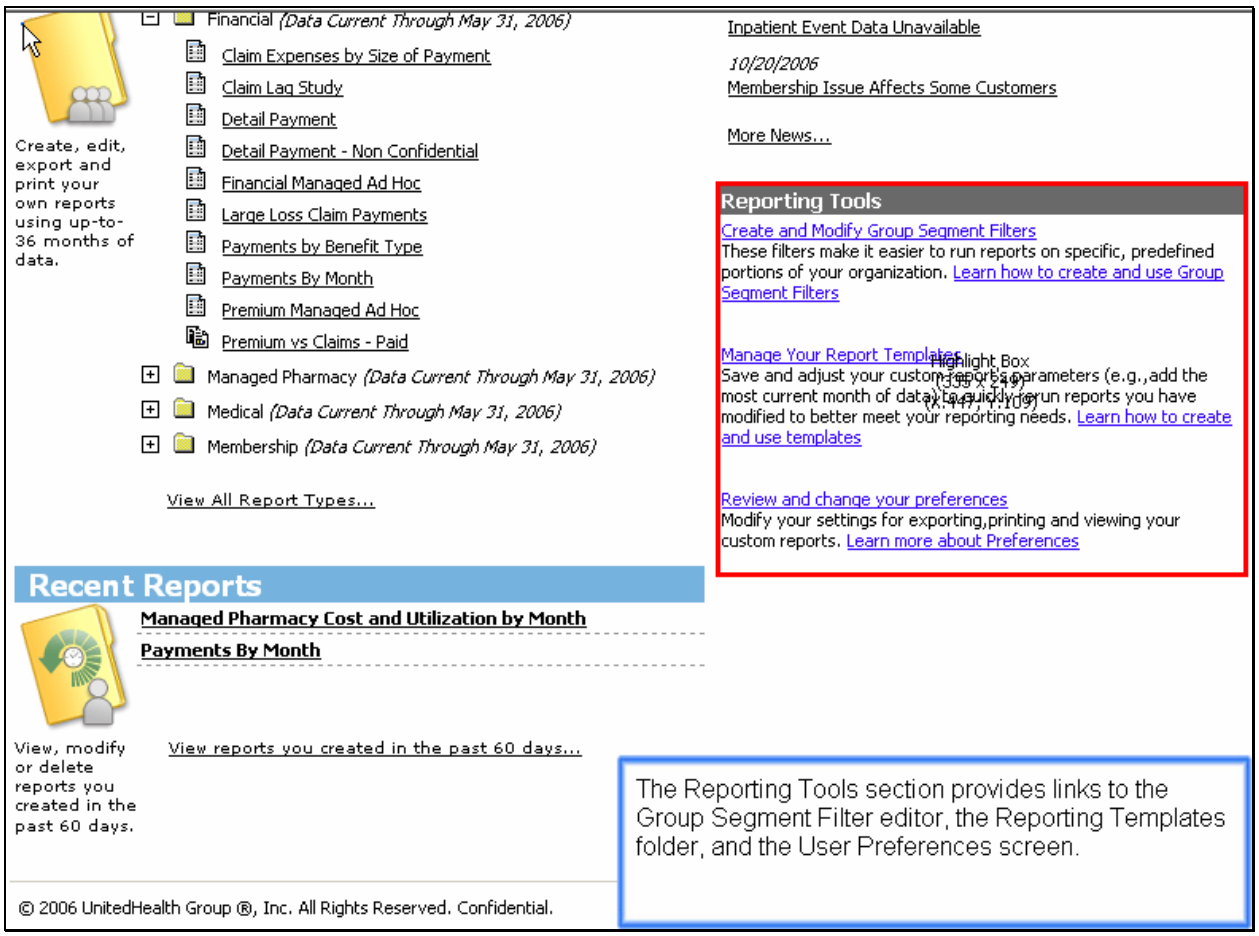

The Reporting Tools section provides links to the Group Segment Filter editor, the Reporting Templates folder, and the User Preferences screen.

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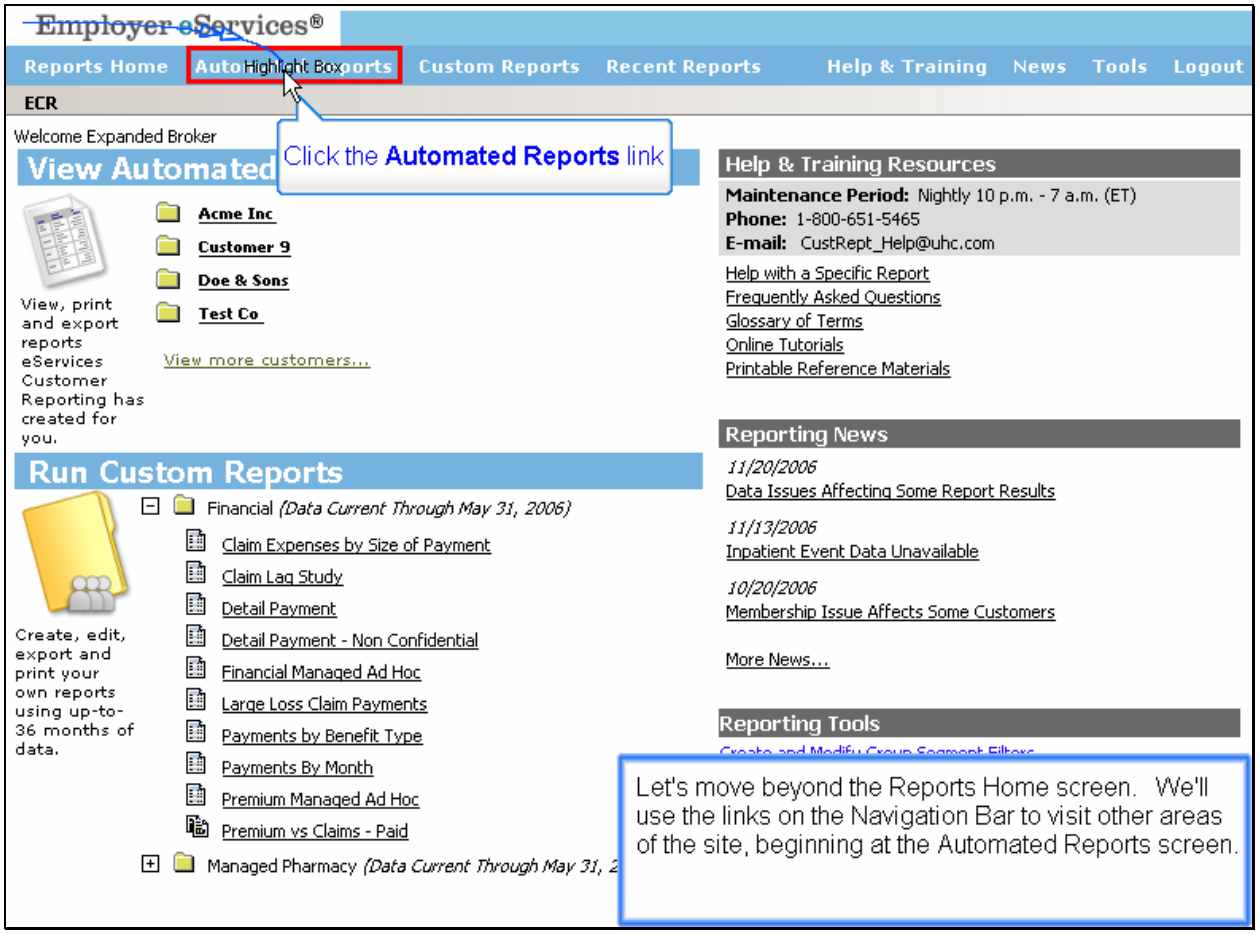

Let's move beyond the Reports Home screen. We'll use the links on the Navigation Bar to visit other areas of the site, beginning at the Automated Reports screen.

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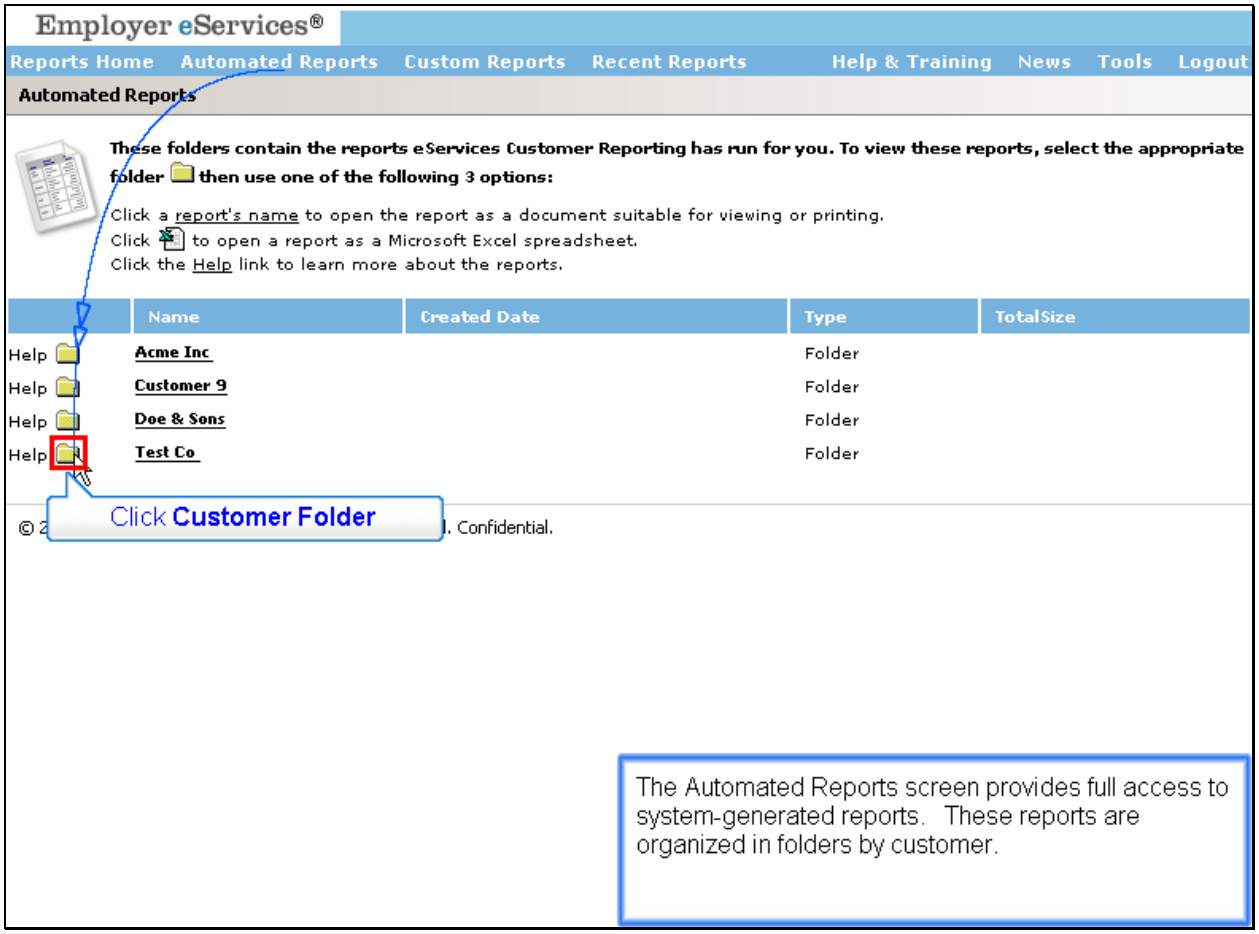

The Automated Reports screen provides full access to system-generated reports. These reports are organized in folders by customer.

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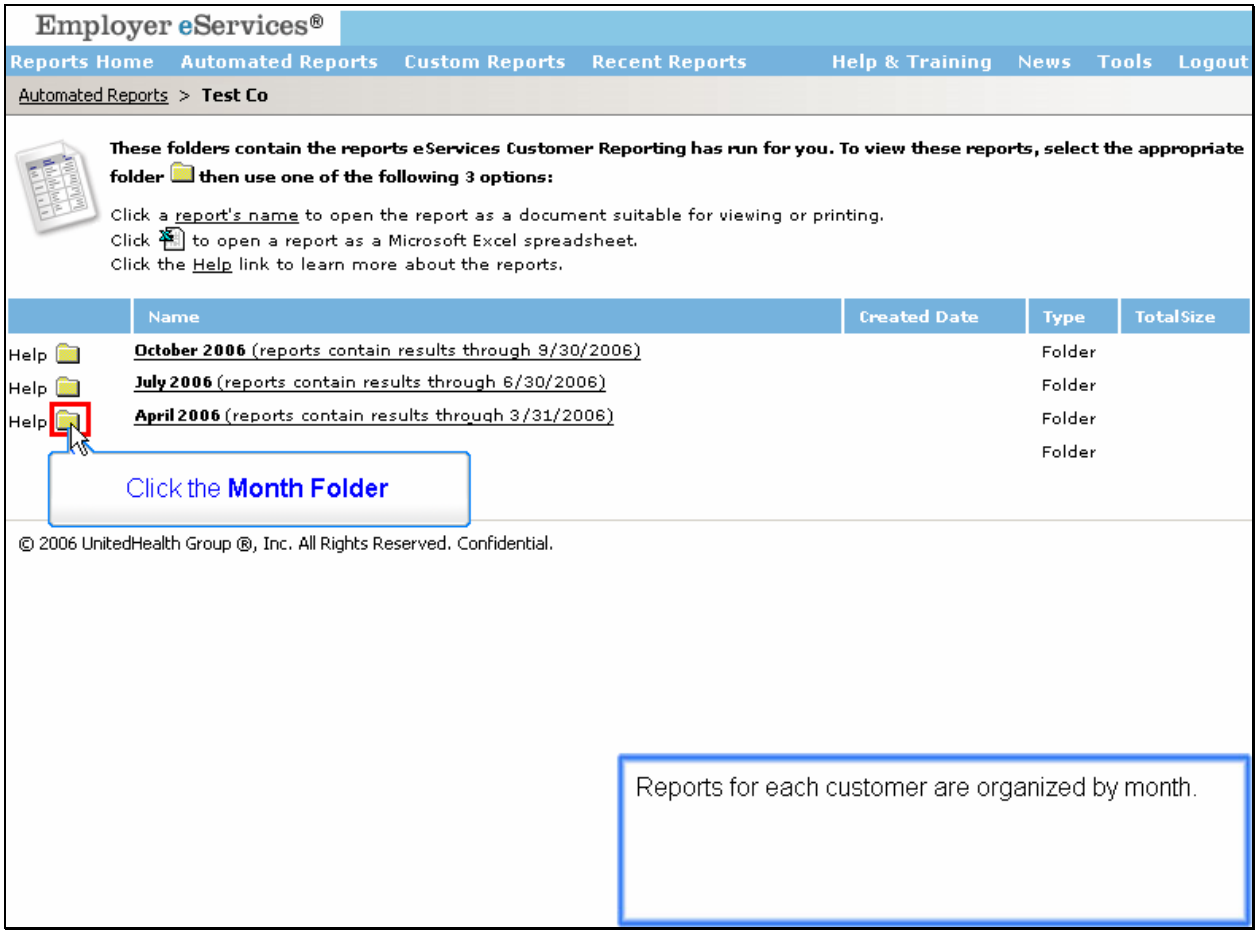

Reports for each customer are organized by month.

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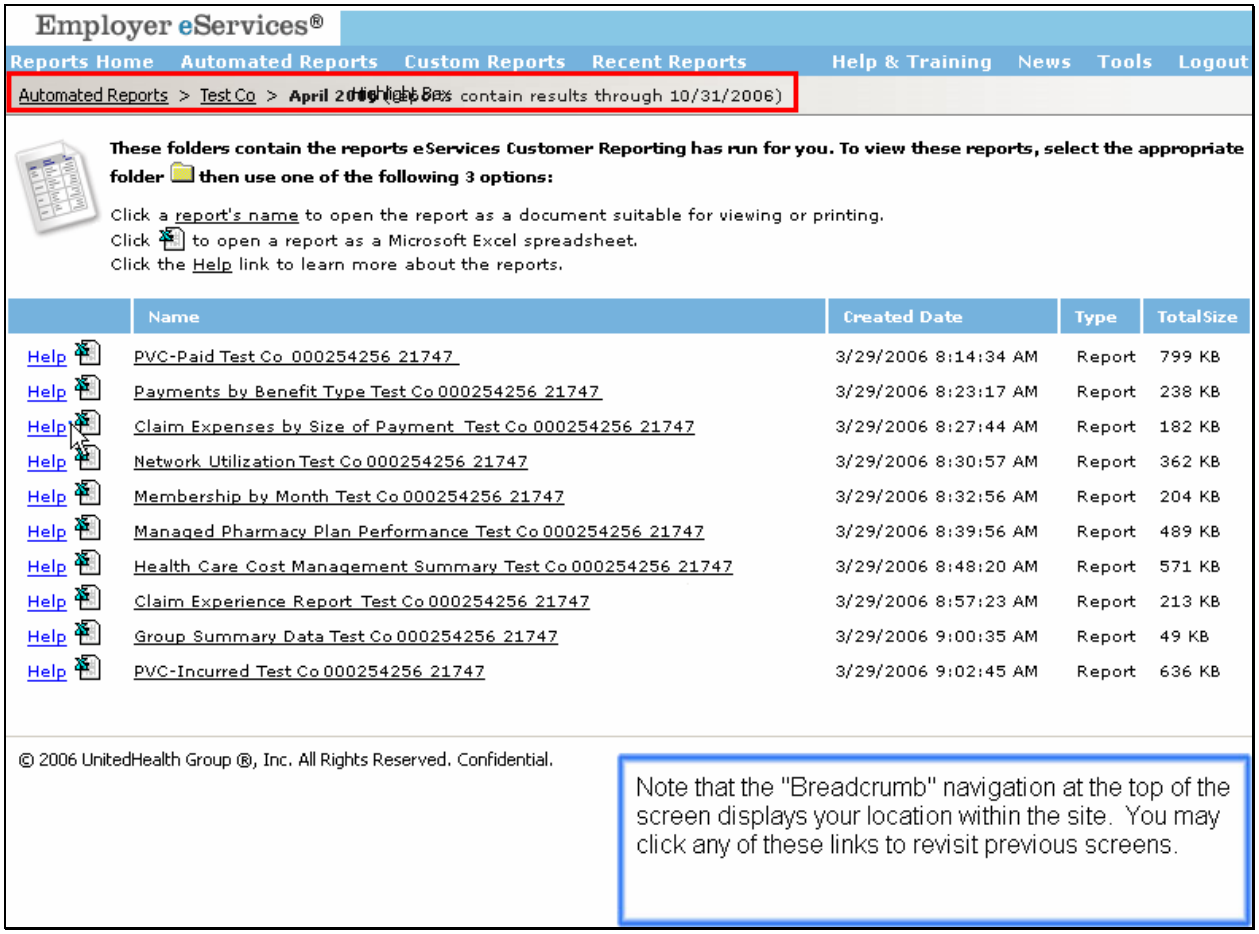

Note that the "Breadcrumb" navigation at the top of the screen displays your location within the site. You may click any of these links to revisit previous screens.

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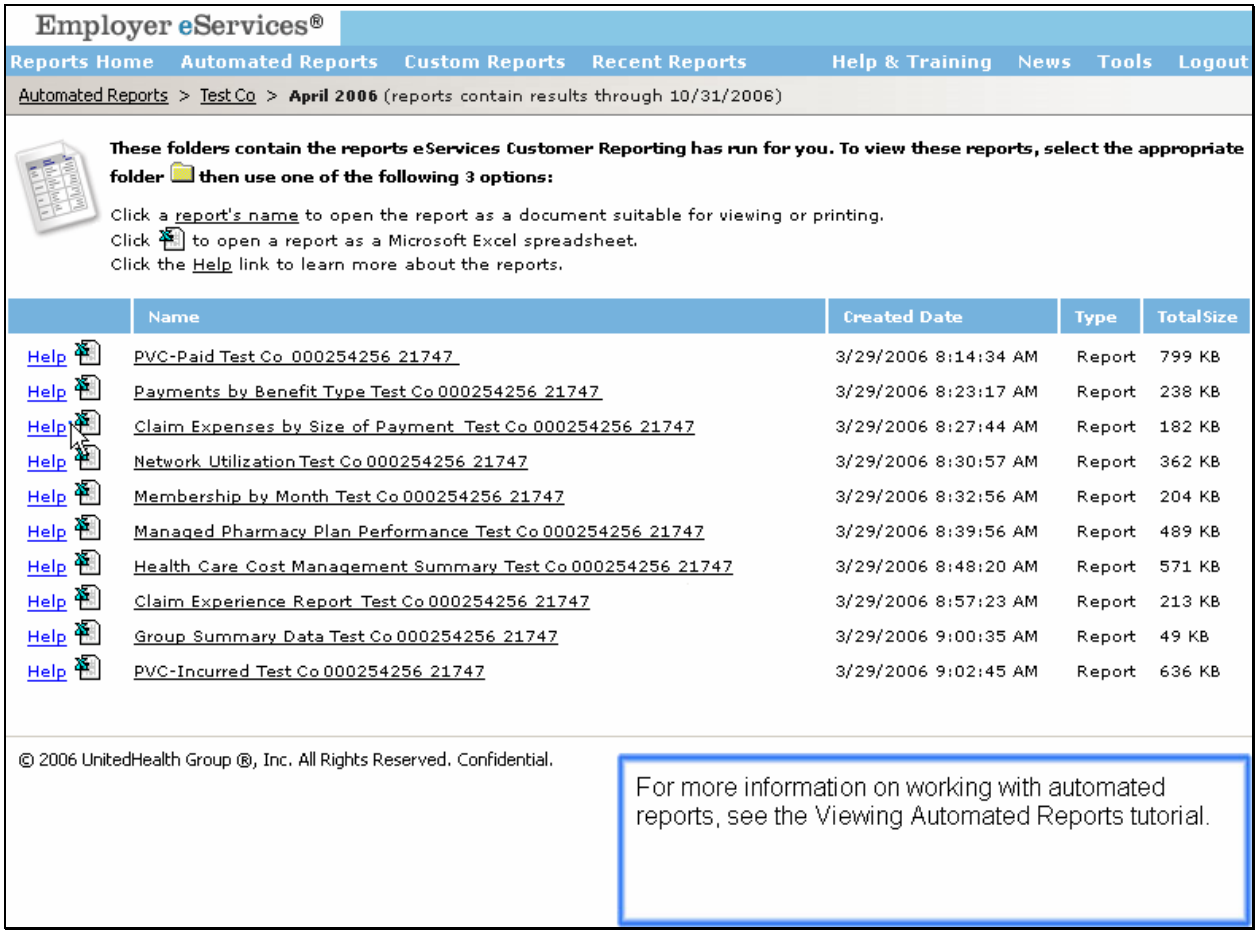

For more information on working with automated reports, see the Viewing Automated Reports tutorial.

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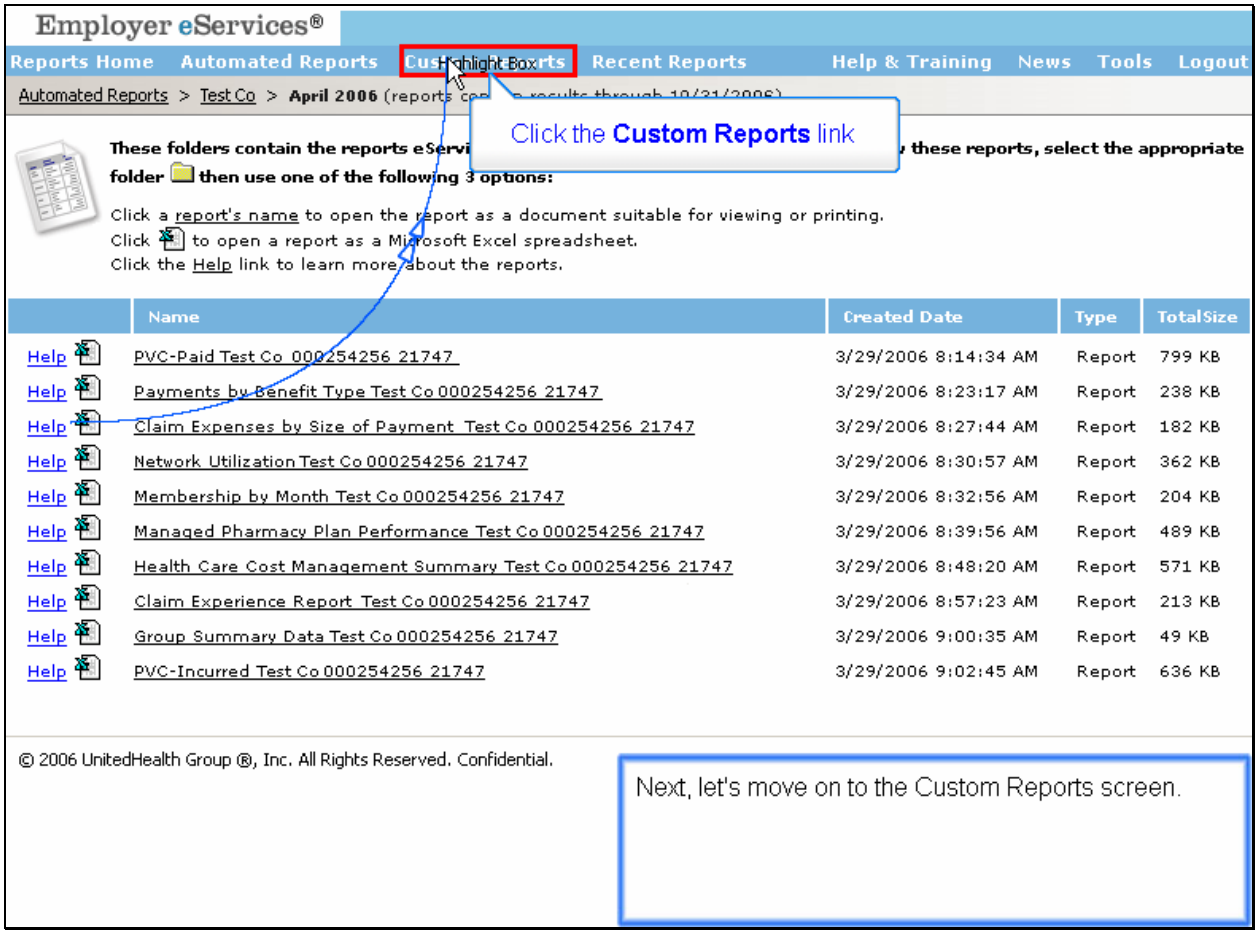

Next, let's move on to the Custom Reports screen.

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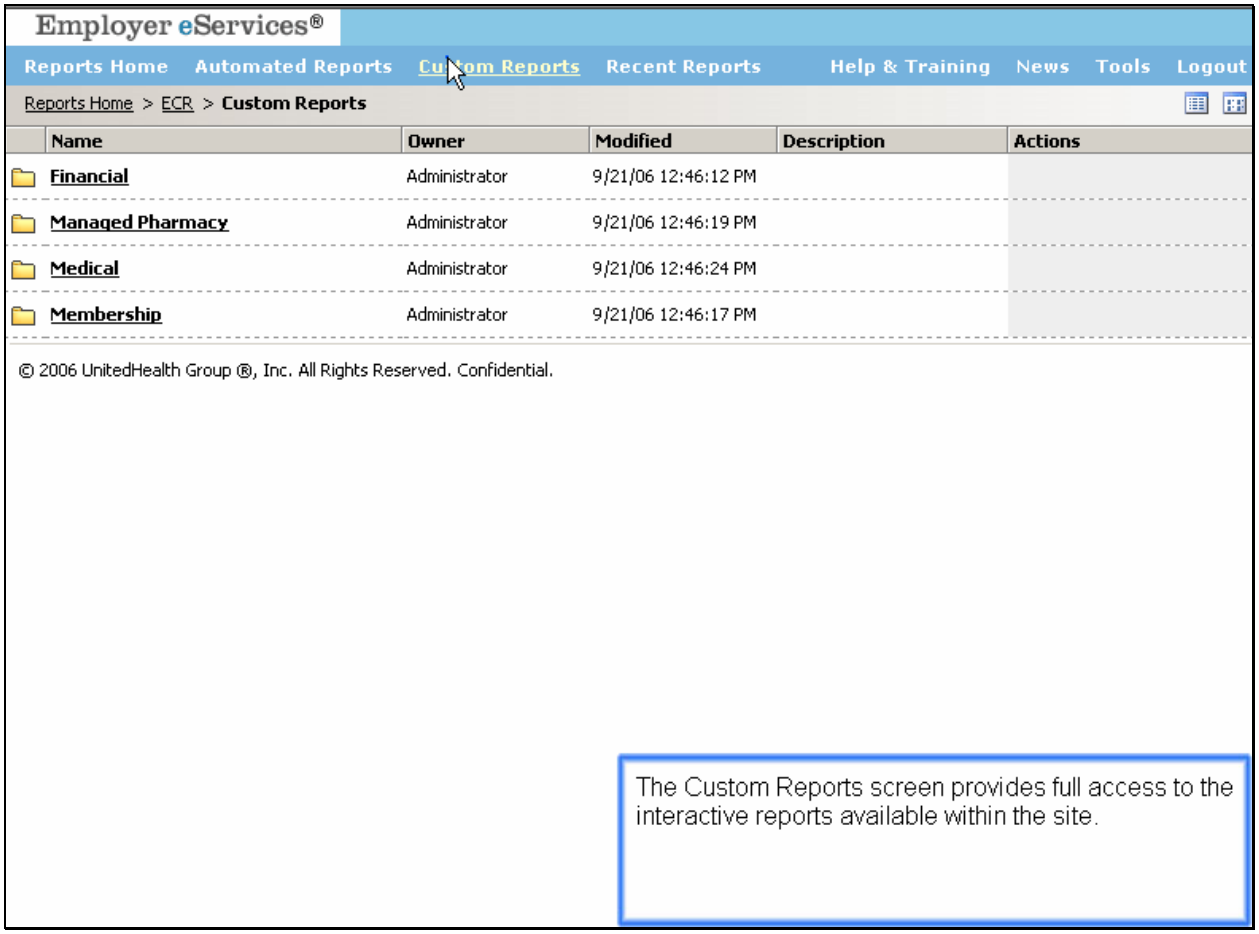

The Custom Reports screen provides full access to the interactive reports available within the site.

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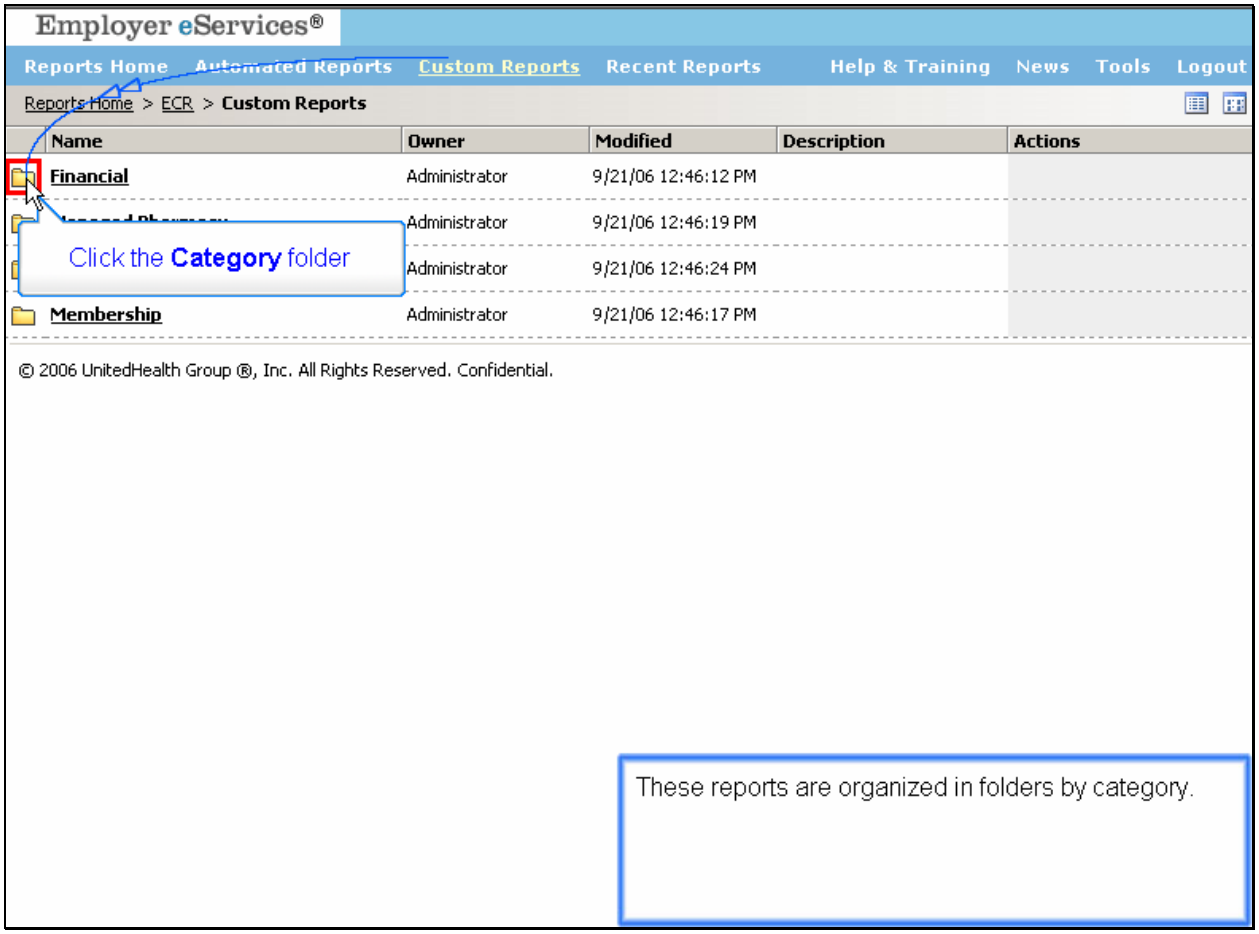

These reports are organized in folders by category.

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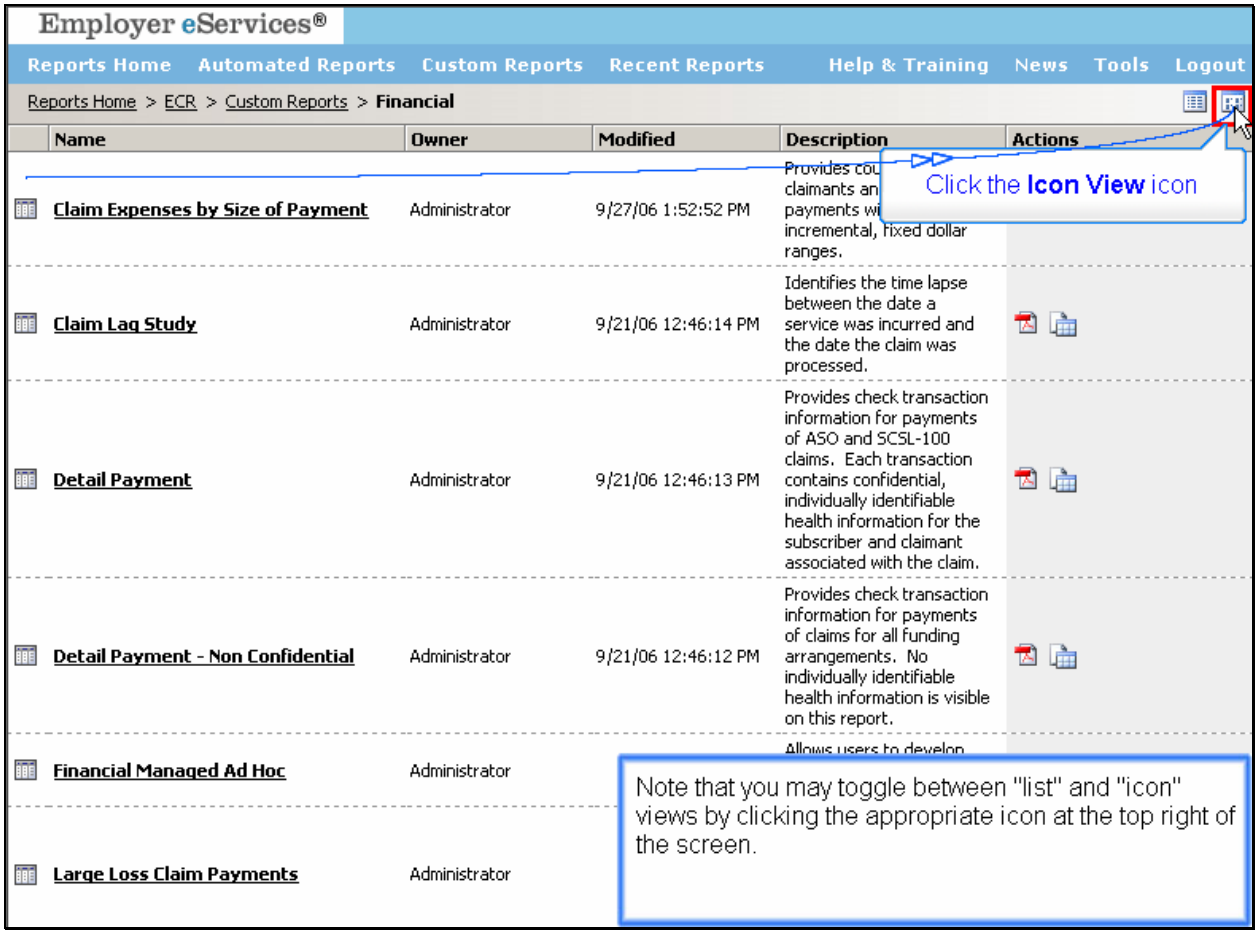

Note that you may toggle between "list" and "icon" views by clicking the appropriate icon at the top right of the screen.

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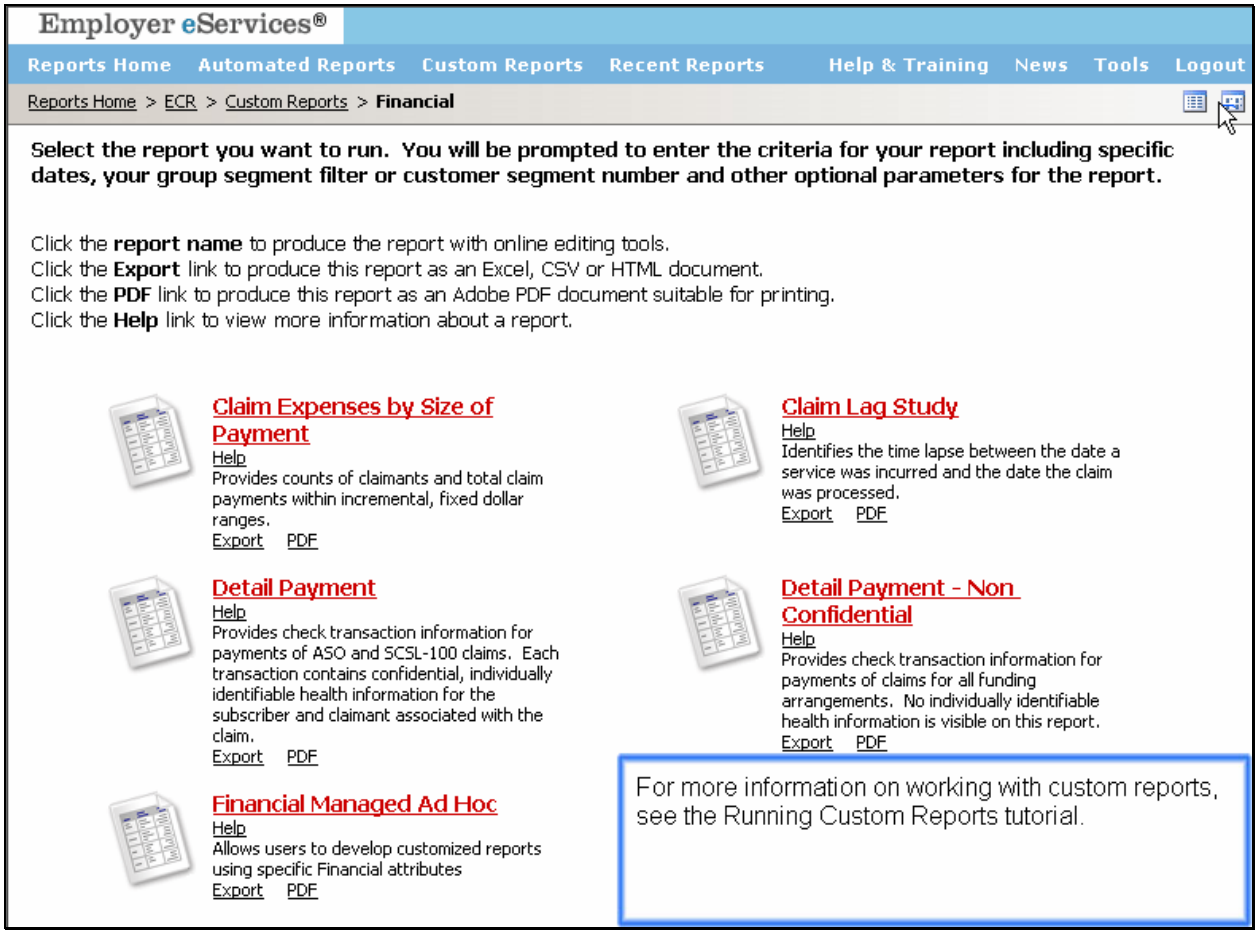

For more information on working with custom reports, see the Running Custom Reports tutorial.

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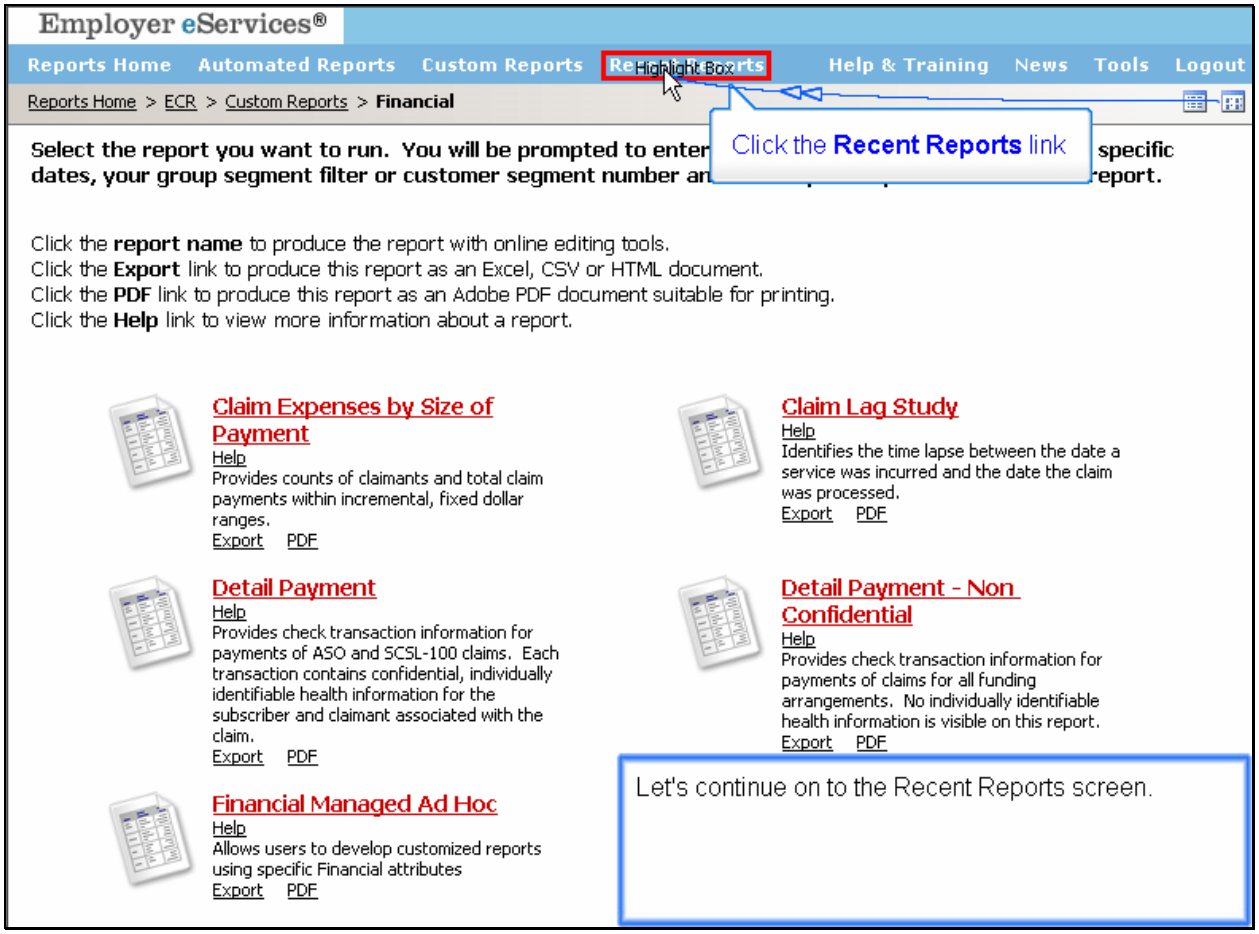

Let's continue on to the Recent Reports screen.

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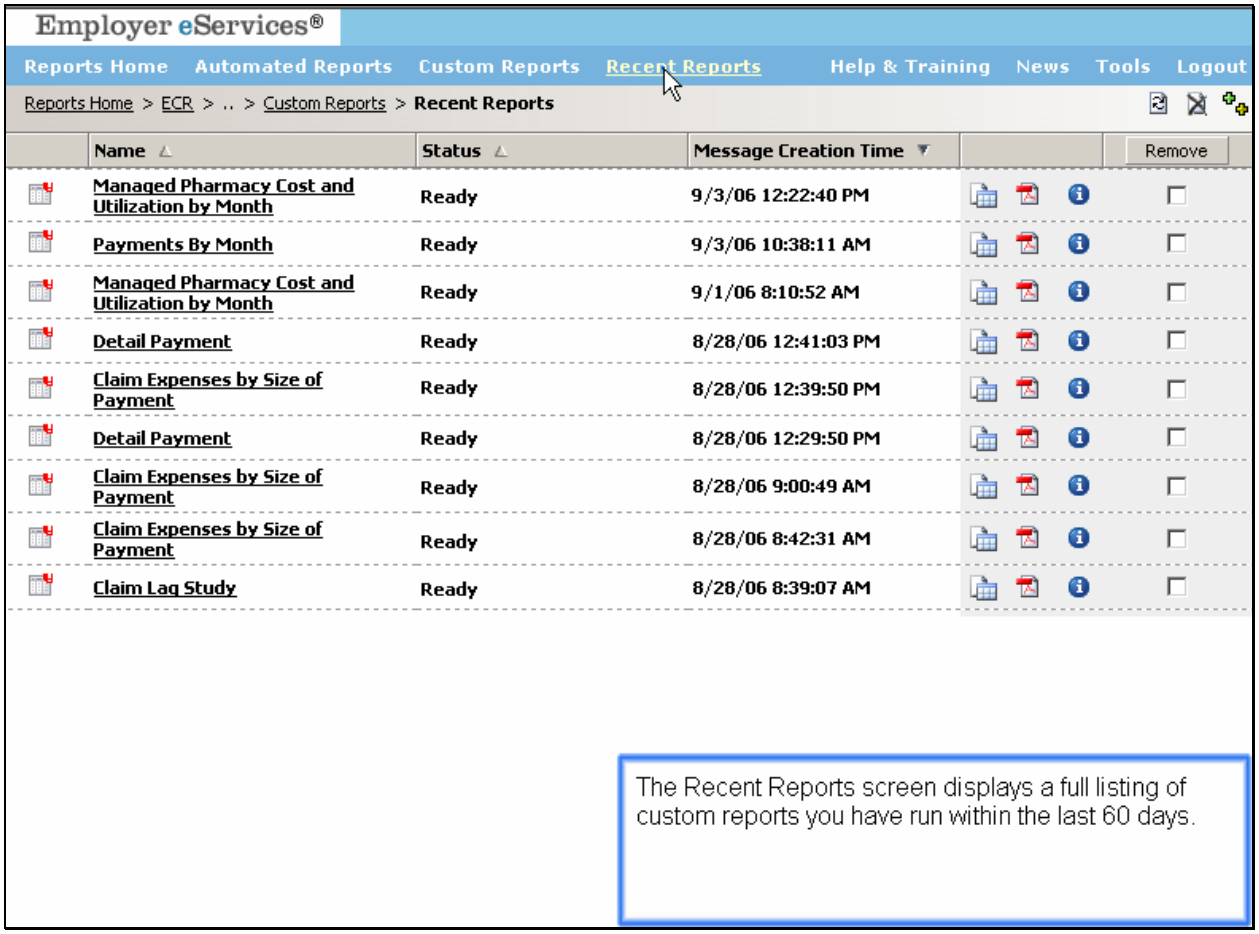

The Recent Reports screen displays a full listing of custom reports you have run within the last 60 days.

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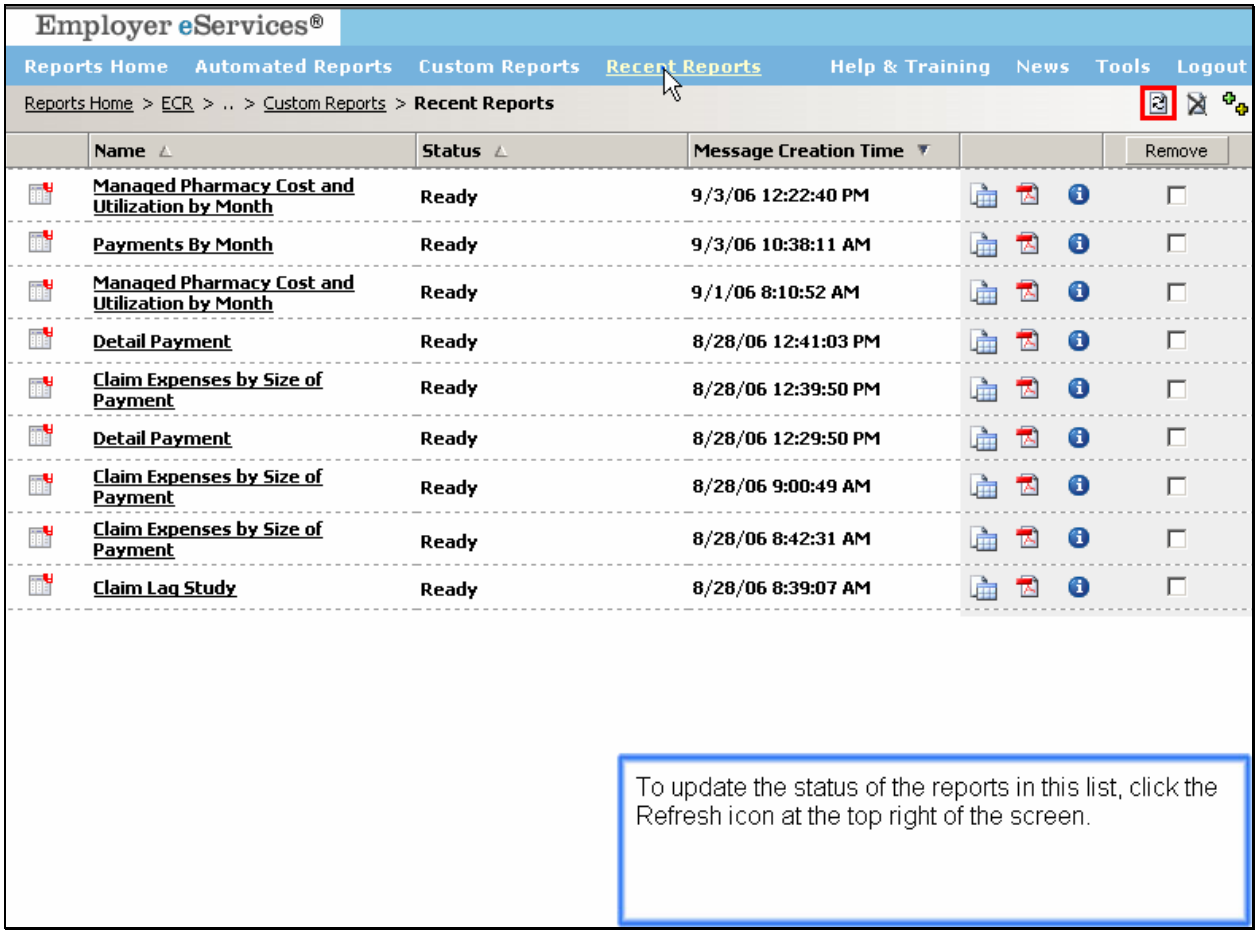

To update the status of the reports in this list, click the Refresh icon at the top right of the screen.

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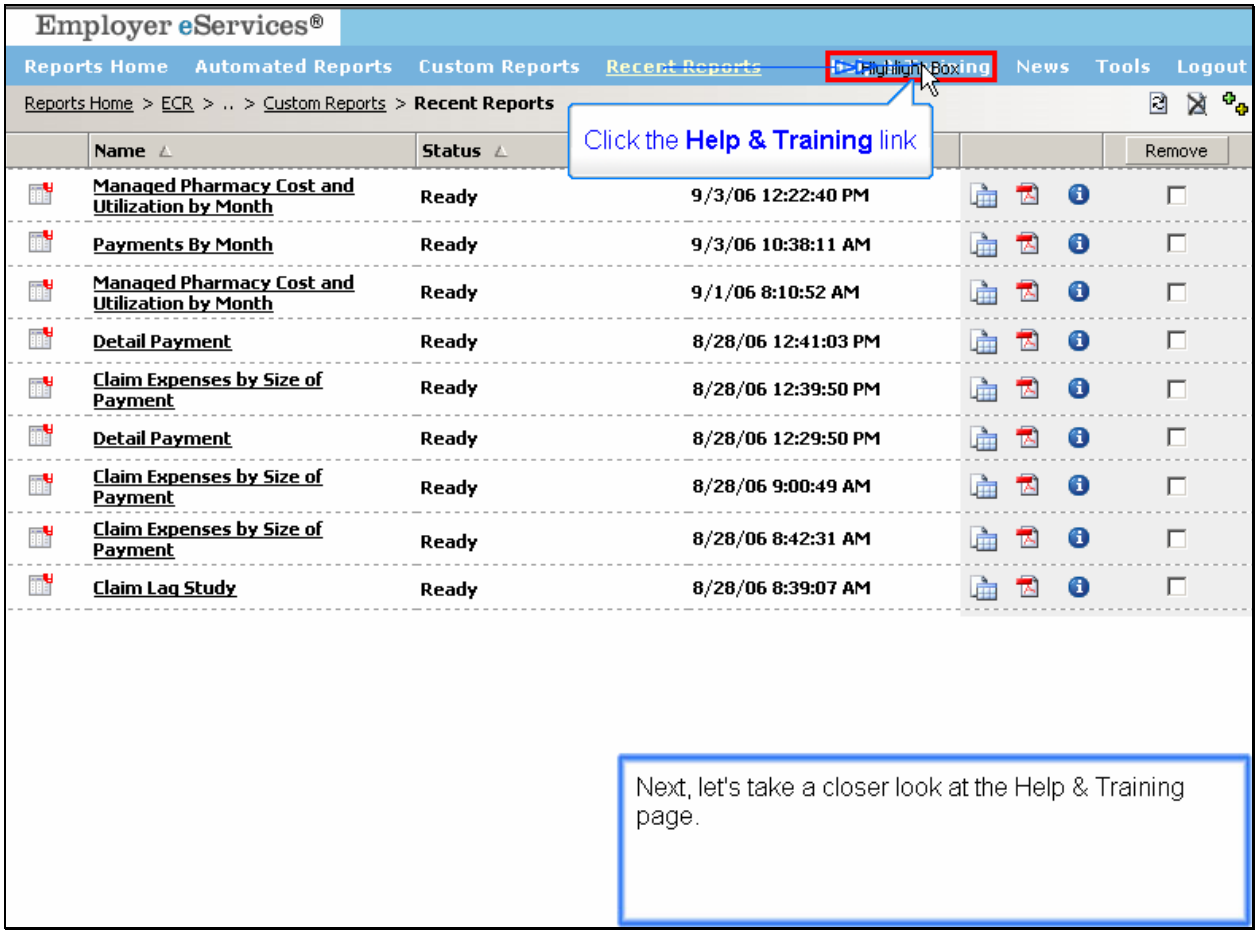

Next, let's take a closer look at the Help & Training page.

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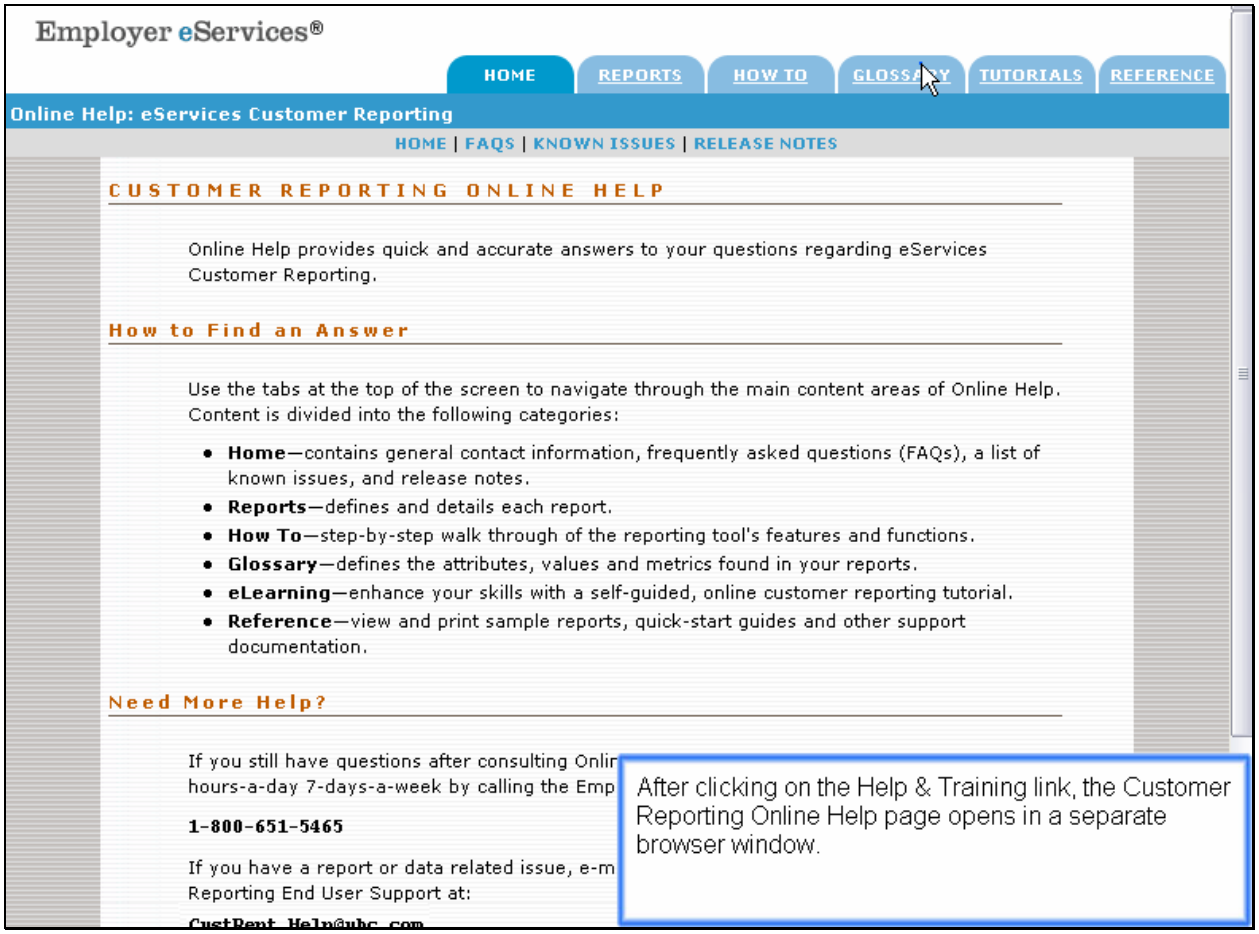

After clicking on the Help & Training link, the Customer Reporting Online Help page opens in a separate browser window.

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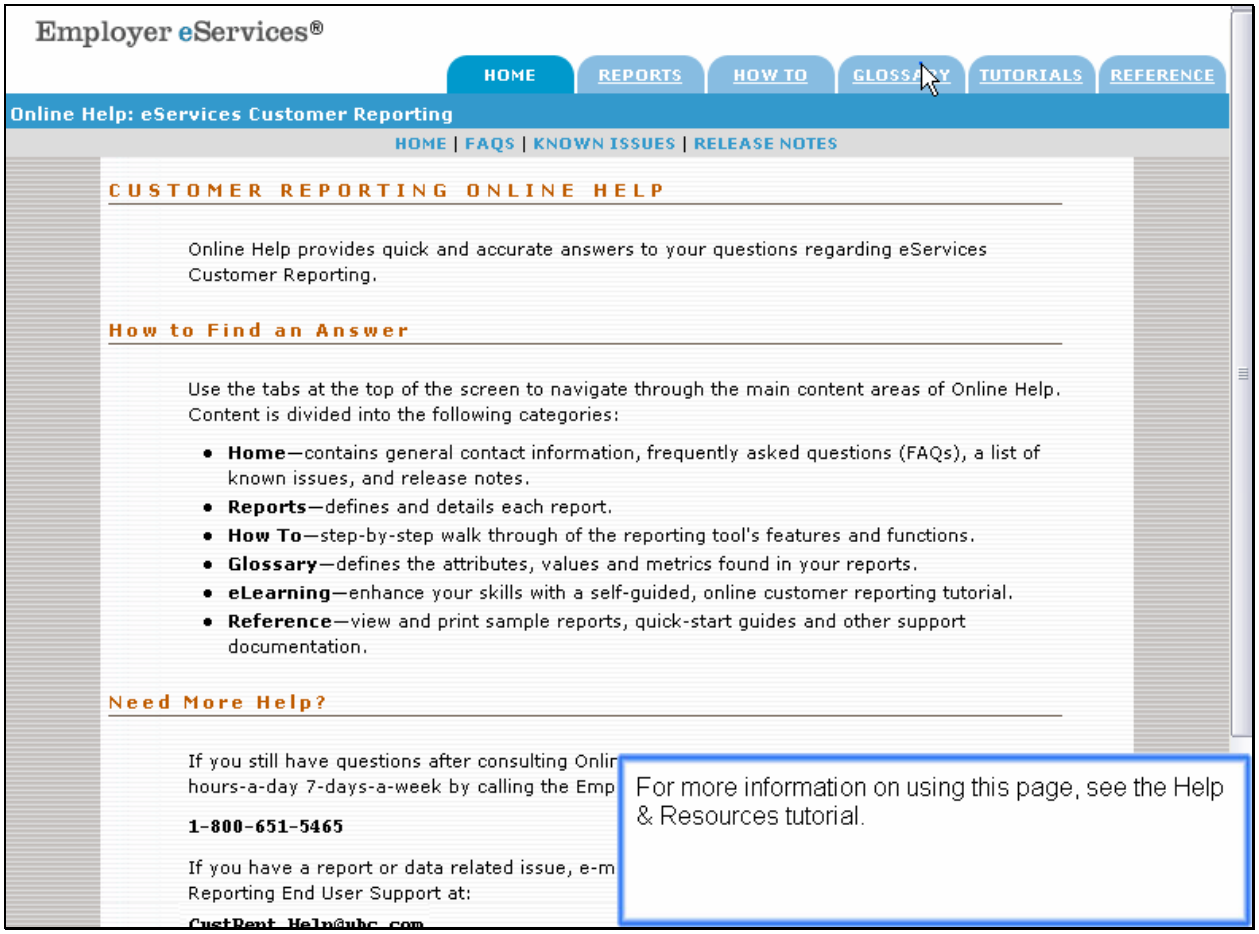

For more information on using this page, see the Help & Resources tutorial.

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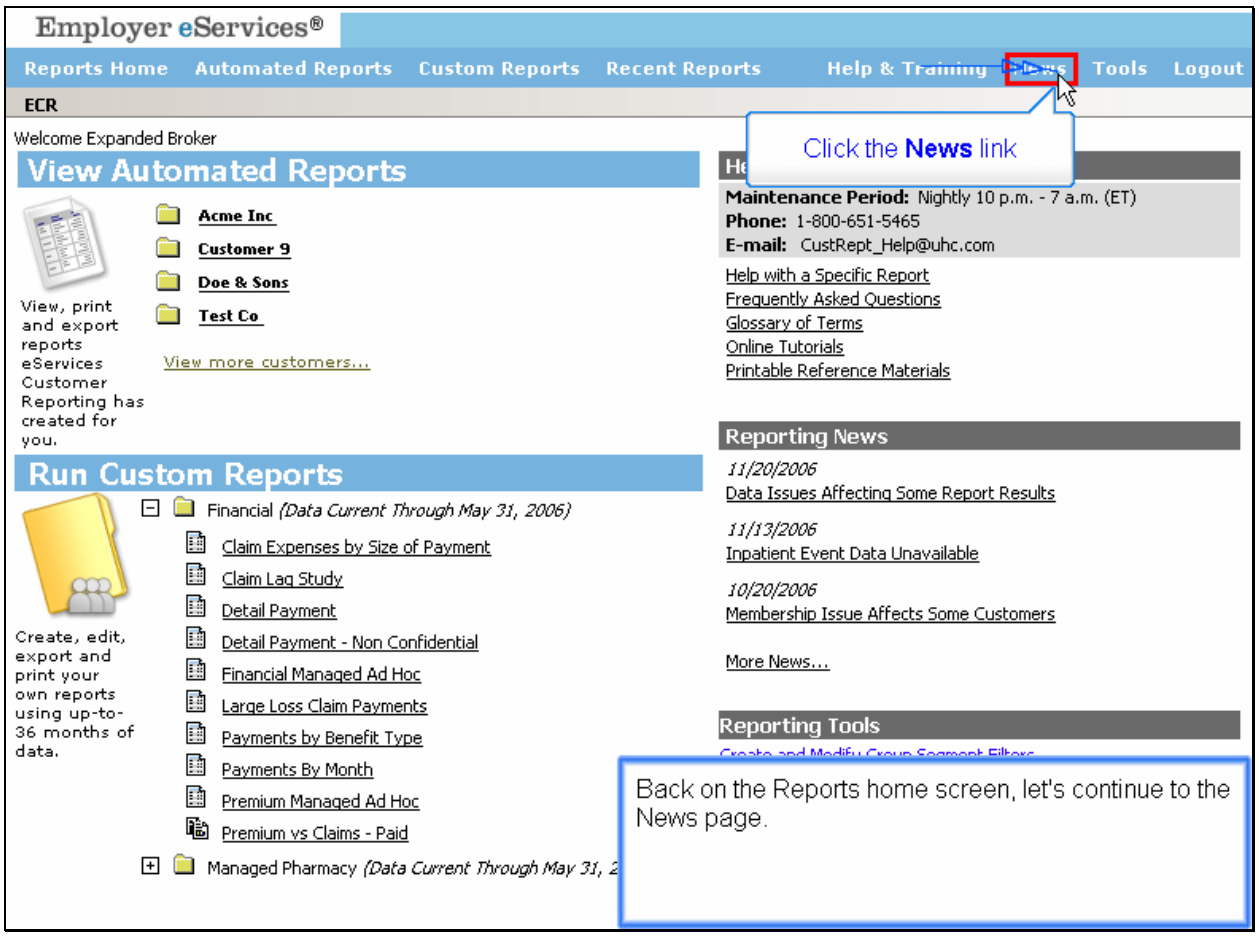

Back on the Reports home screen, let's continue to the News page.

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As with Online Help, the Reporting News page also opens in a separate window. This page contains a historical list of alerts which have impacted the reporting site.

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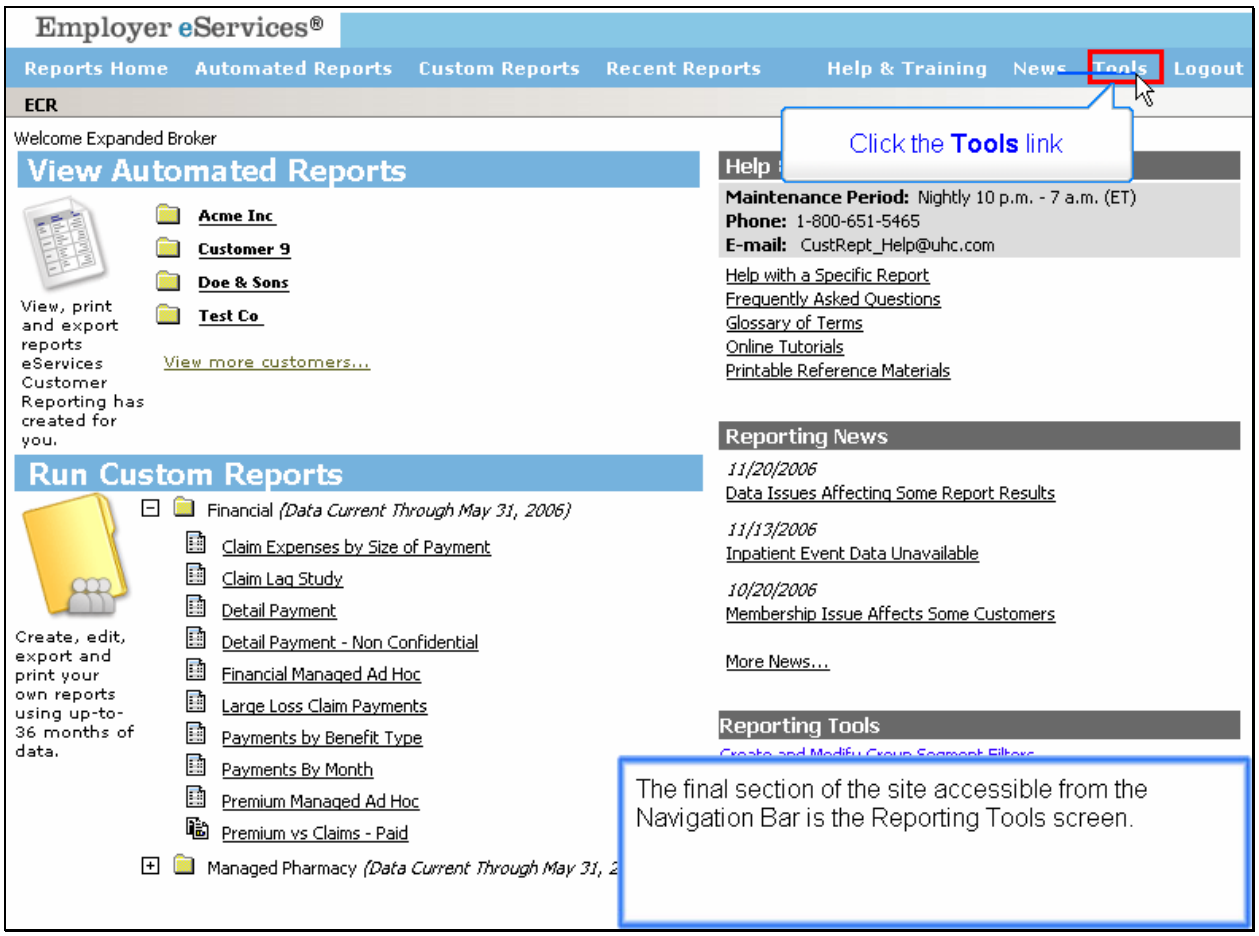

The final section of the site accessible from the Navigation Bar is the Reporting Tools screen.

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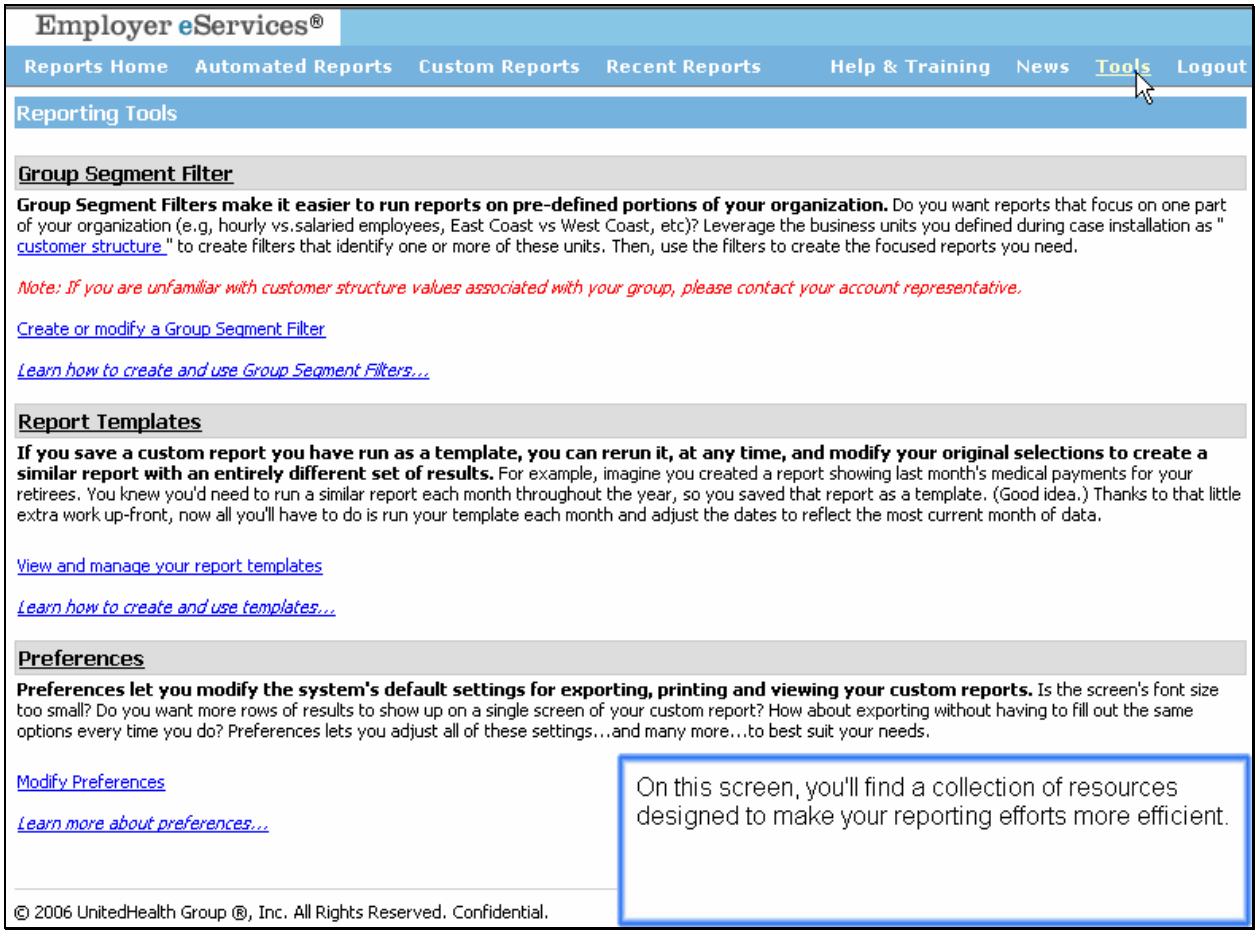

On this screen, you'll find a collection of resources designed to make your reporting efforts more efficient.

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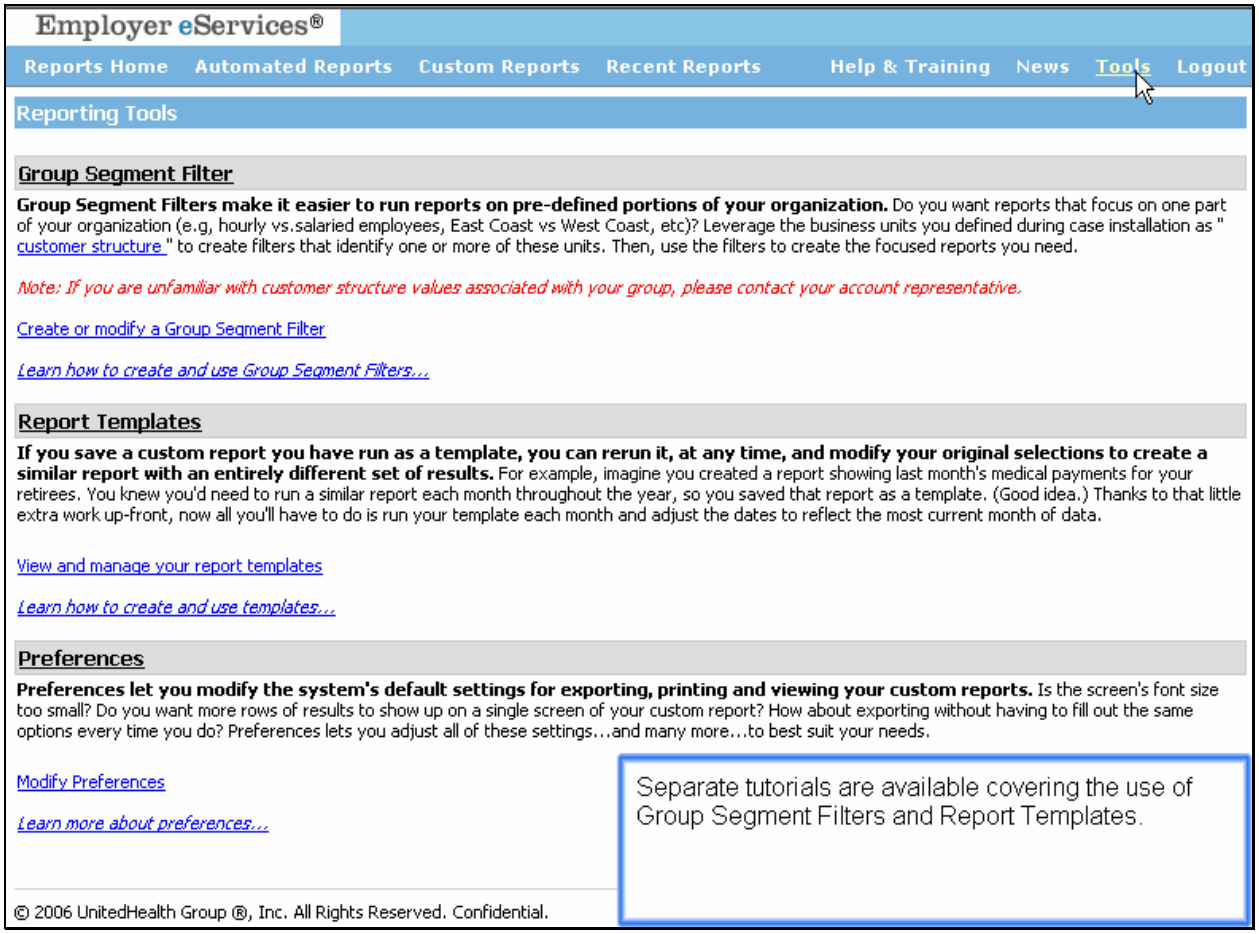

Separate tutorials are available covering the use of Group Segment Filters and Report Templates.

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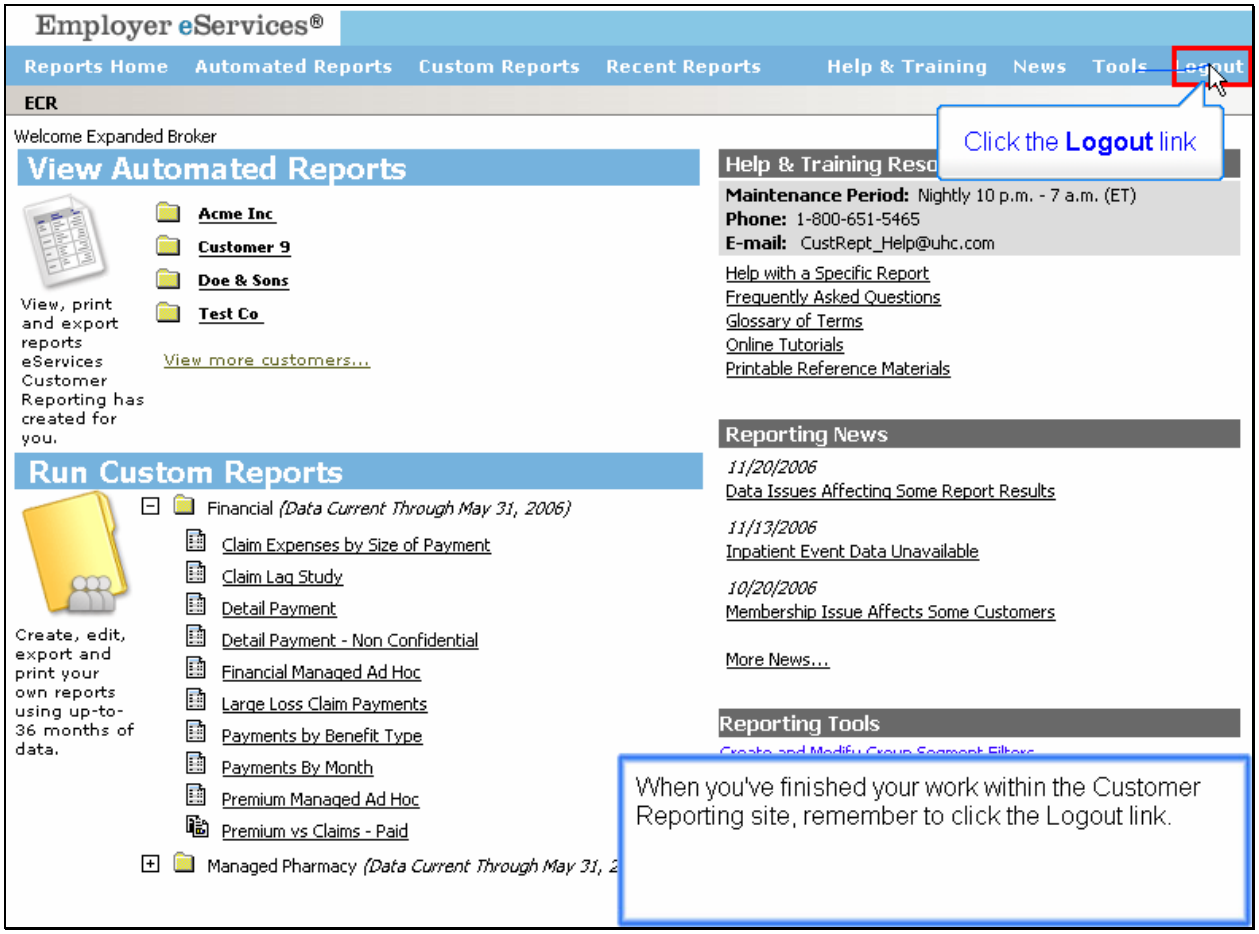

When you've finished your work within the Customer Reporting site, remember to click the Logout link.

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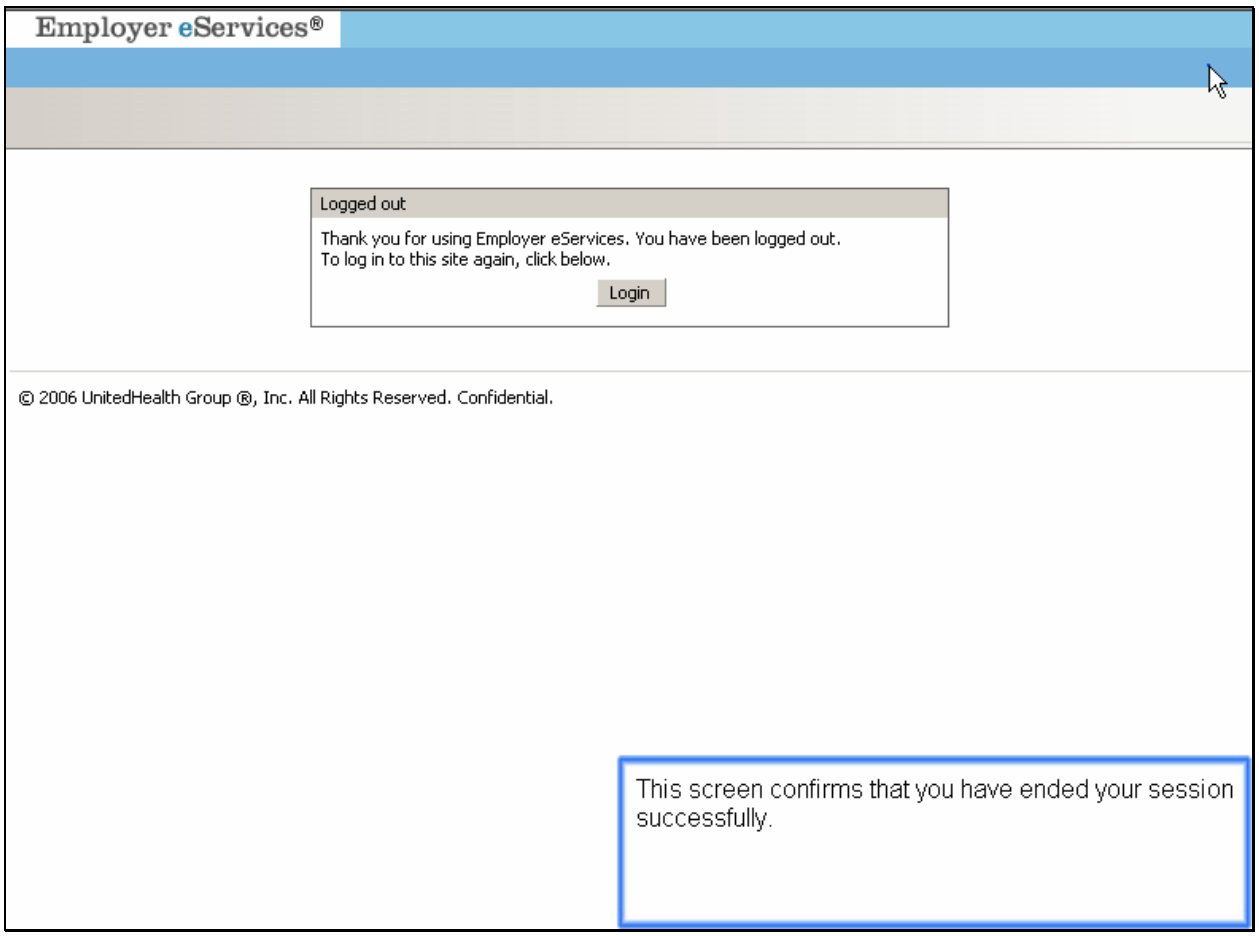

This screen confirms that you have ended your session successfully.

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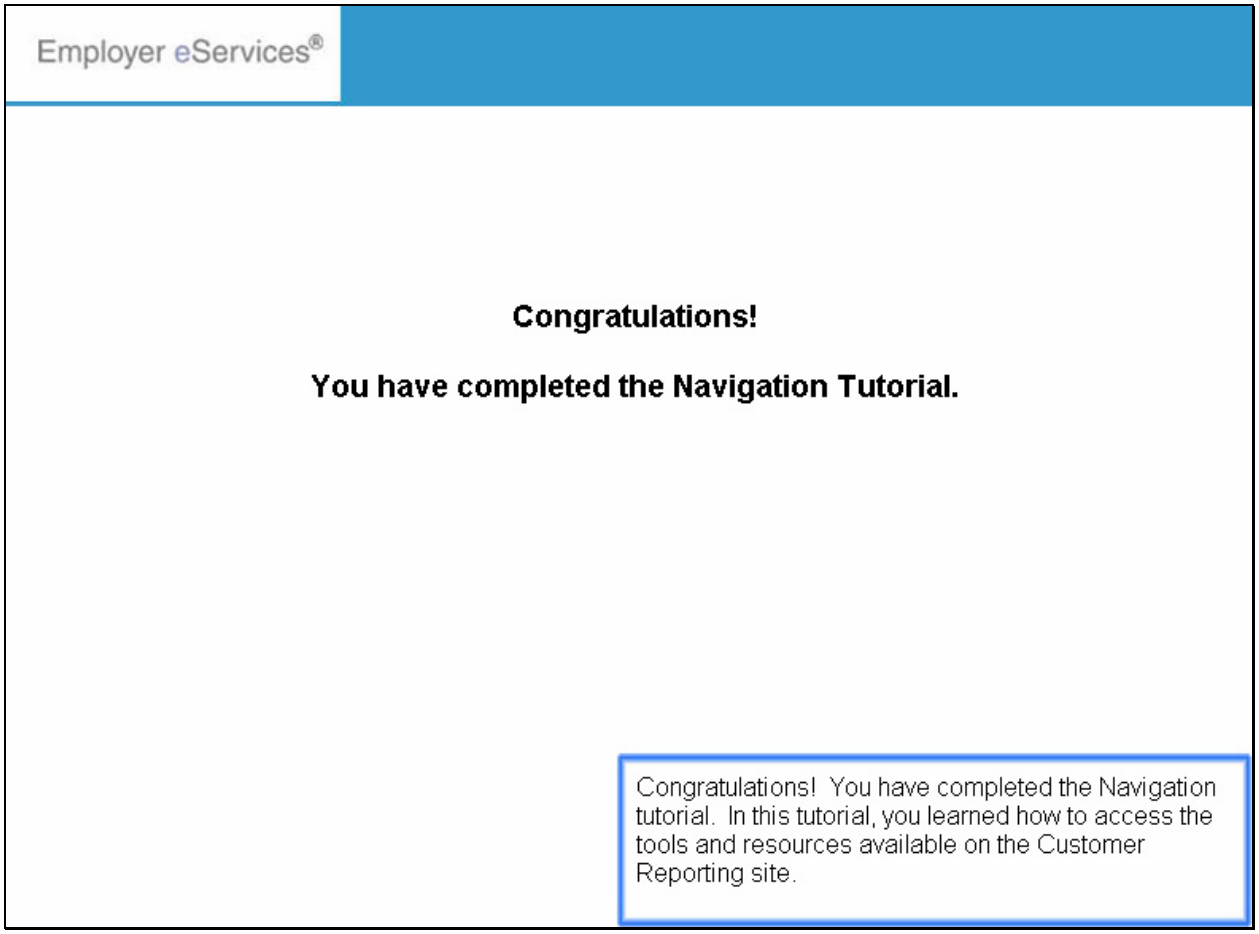

Congratulations! You have completed the Navigation tutorial. In this tutorial, you learned how to access the tools and resources available on the Customer Reporting site.

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