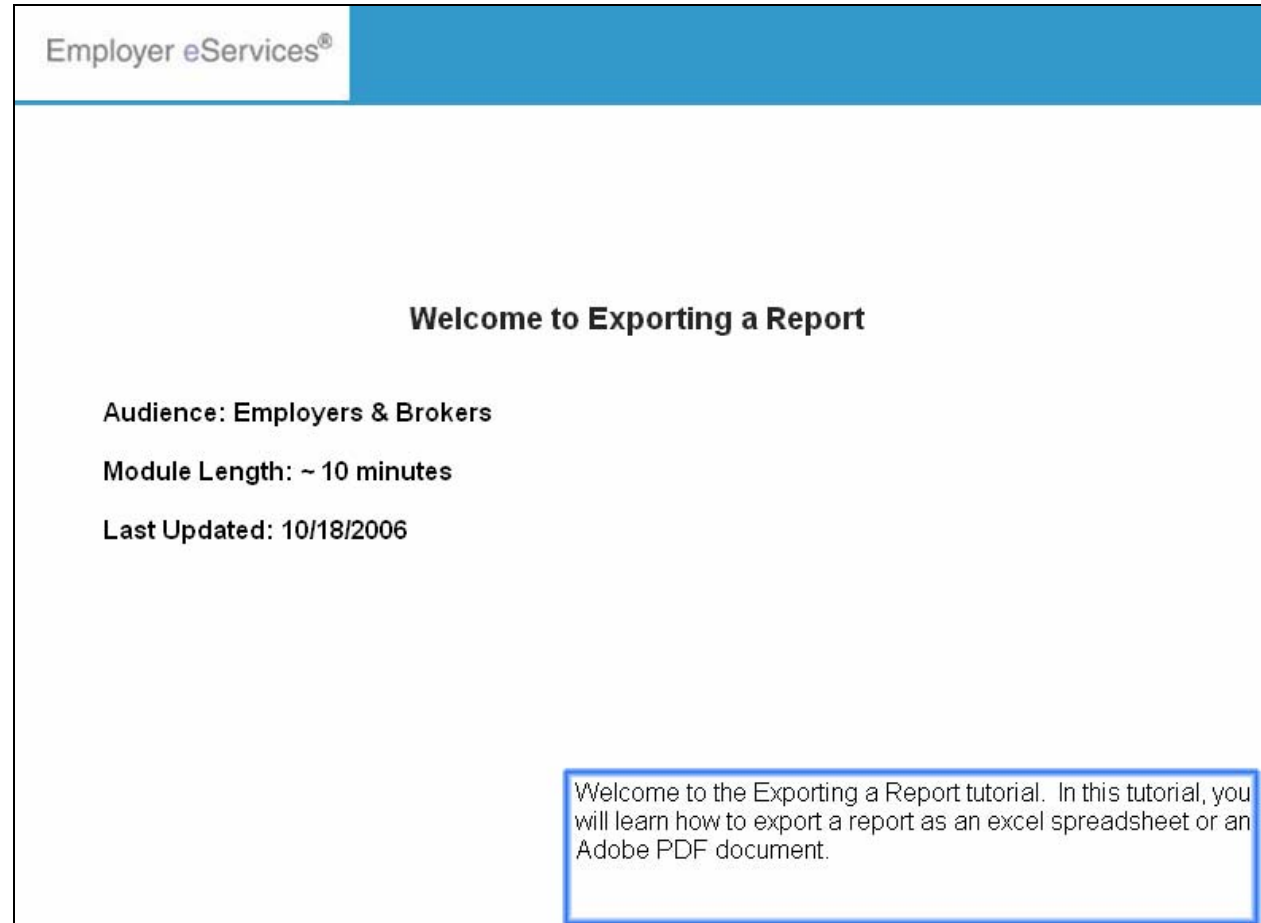


Slide 1 - Slide 1

The slide features a blue header bar with the text "Employer eServices®" on the left. The main content area is white and contains the following text: "Welcome to Exporting a Report" in bold, followed by "Audience: Employers & Brokers", "Module Length: ~ 10 minutes", and "Last Updated: 10/18/2006". A blue-bordered box in the bottom right corner contains the text: "Welcome to the Exporting a Report tutorial. In this tutorial, you will learn how to export a report as an excel spreadsheet or an Adobe PDF document."/>

Employer eServices®

Welcome to Exporting a Report

Audience: Employers & Brokers

Module Length: ~ 10 minutes

Last Updated: 10/18/2006

Welcome to the Exporting a Report tutorial. In this tutorial, you will learn how to export a report as an excel spreadsheet or an Adobe PDF document.

Slide notes

Text Captions

Welcome to the Exporting a Report tutorial. In this tutorial, you will learn how to export a report as an excel spreadsheet or an Adobe PDF document.

Slide 2 - Slide 2

The slide content area features a blue header bar with the "Employer eServices®" logo on the left. The main content is centered and includes the title "Welcome to Exporting a Report", followed by three lines of text: "Audience: Employers & Brokers", "Module Length: ~ 10 minutes", and "Last Updated: 10/18/2006". A blue-bordered box in the bottom right corner contains the text: "As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback."

Slide notes

Text Captions

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

Slide 3 - Slide 3

Welcome to Exporting a Report

Audience: Employers & Brokers

Module Length: ~ 10 minutes

Last Updated: 10/18/2006

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.

Slide notes

Text Captions

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.

Slide 4 - Slide 4

The slide content area features a blue header bar with the "Employer eServices®" logo on the left. Below the header, the text "Welcome to Exporting a Report" is centered. Underneath, three lines of text provide details: "Audience: Employers & Brokers", "Module Length: ~ 10 minutes", and "Last Updated: 10/18/2006". A blue-bordered box in the bottom right corner contains a disclaimer: "Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental."

Slide notes

Text Captions

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

Slide 5 - Slide 5

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > My Report. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report actions. The main content area displays a table with the following data:

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	(478,701)	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

A callout box with a blue border points to the table, containing the text: "A new browser window opens showing report results. Notice that the metrics for this report are listed in the columns that follow the divider column labeled Metrics."

Slide notes

Text Captions

A new browser window opens showing report results. Notice that the metrics for this report are listed in the columns that follow the divider column labeled Metrics.

Slide 6 - Slide 6

The screenshot shows the Employer eServices interface. The breadcrumb trail is: Reports Home > ECR > Custom Reports > Financial > My Report. The report title is "My Report" and it was last updated on 5/9/2006 at 9:26:12 AM. The report displays a table with 2 data rows and 4 data columns. The table columns are: Book Year/Month, Benefit Payment Metrics, Medical Payments, Managed Pharmacy Payments, Capitation Payments, and Total Payments. The data rows are: 2005-01 and Total. The Total row shows a total of \$80,887 for all categories.

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

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To learn more about how to manipulate your data in Report Results view please see the Manipulating Report Data Tutorial.

Slide notes

Text Captions

To learn more about how to manipulate your data in Report Results view please see the Manipulating Report Data Tutorial.

Slide 7 - Slide 7

The screenshot shows the Employer eServices interface. At the top, there is a navigation bar with links like 'Reports Home', 'Automate', 'Reports', 'Recent Reports', 'Help & Training', 'News', 'Tools', and 'Logout'. Below this is a breadcrumb trail: 'Reports Home > ECR > Custom Report'. A menu bar includes 'File', 'View', 'Data', and 'Format'. The toolbar contains various icons, with the Microsoft Excel spreadsheet icon highlighted by a red box and a blue callout bubble that says 'Click the Microsoft Excel export icon'. The main content area displays a table with the following data:

Book Year/Month ▲	Benefit Payment Metrics	Medical Payments ▼	Managed Pharmacy Payments ▼	Capitation Payments ▼	Total Payments ▼
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

Below the table, there is a copyright notice: '© 2006 UnitedHealth Group ®, Inc. All Rights Reserved. Confidential.' At the bottom right of the screenshot, there is a blue-bordered text box containing the instruction: 'If you would like to export the report into Microsoft Excel, click the Excel spreadsheet icon in the toolbar.'

Slide notes

Text Captions

Click the **Microsoft Excel** export icon

If you would like to export the report into Microsoft Excel, click the Excel spreadsheet icon in the toolbar.

Slide 8 - Slide 8

Slide notes

Text Captions

Select the Export drop-down menu

After clicking on the Microsoft Excel icon, the Export Options window will appear. Select the export options that best meet your needs.

Slide 9 - Slide 9

Employer eServices®

Help

Export Options

My Report

Export: Whole report

Whole report
Whole report
Portion displayed on

Select the **Whole report** item

Excel with plain
 CSV file format
 Excel with formatting
 HTML
 Plain text Delimiter: Comma

Export metric values as text⁽¹⁾
 Export headers as text⁽¹⁾
 Export filter details
 Remove extra column from exported grid⁽²⁾

(1) Excel only
(2) Excel with formatting only

Do not prompt me again. Export

In this example, we chose to export the whole report with Microsoft Excel formatting.

Slide notes

Text Captions

Select the **Whole report** item

In this example, we chose to export the whole report with Microsoft Excel formatting.

Slide 10 - Slide 10

Employer eServices®

Help

Export Options

My Report

Export: **Whole report**

- Excel with plain text
- CSV file format
- Excel with formatting
- HTML
- Plain text Delimiter: **Comma**

Export metric values as text⁽¹⁾

Export headers as text⁽¹⁾

Export filter details

Remove extra column from exported grid⁽²⁾

(1) Excel only
(2) Excel with formatting only

Do not prompt me again. **Export**

Select all desired options

In this example, we chose to export the whole report with Microsoft Excel formatting.

Slide notes

Text Captions

In this example, we chose to export the whole report with Microsoft Excel formatting.

Select all desired options

Slide 11 - Slide 11

Employer eServices®

Help

Export Options

My Report

Export:

Excel with plain text

CSV file format

Excel with formatting

HTML

Plain text Delimiter:

Export metric values as text⁽¹⁾

Export headers as text⁽¹⁾

Export filter details

Remove extra column from exported grid⁽²⁾

(1) Excel only
(2) Excel with formatting only

Do not prompt me again.

Click the **Export** button

Export

Click the Export button to continue.

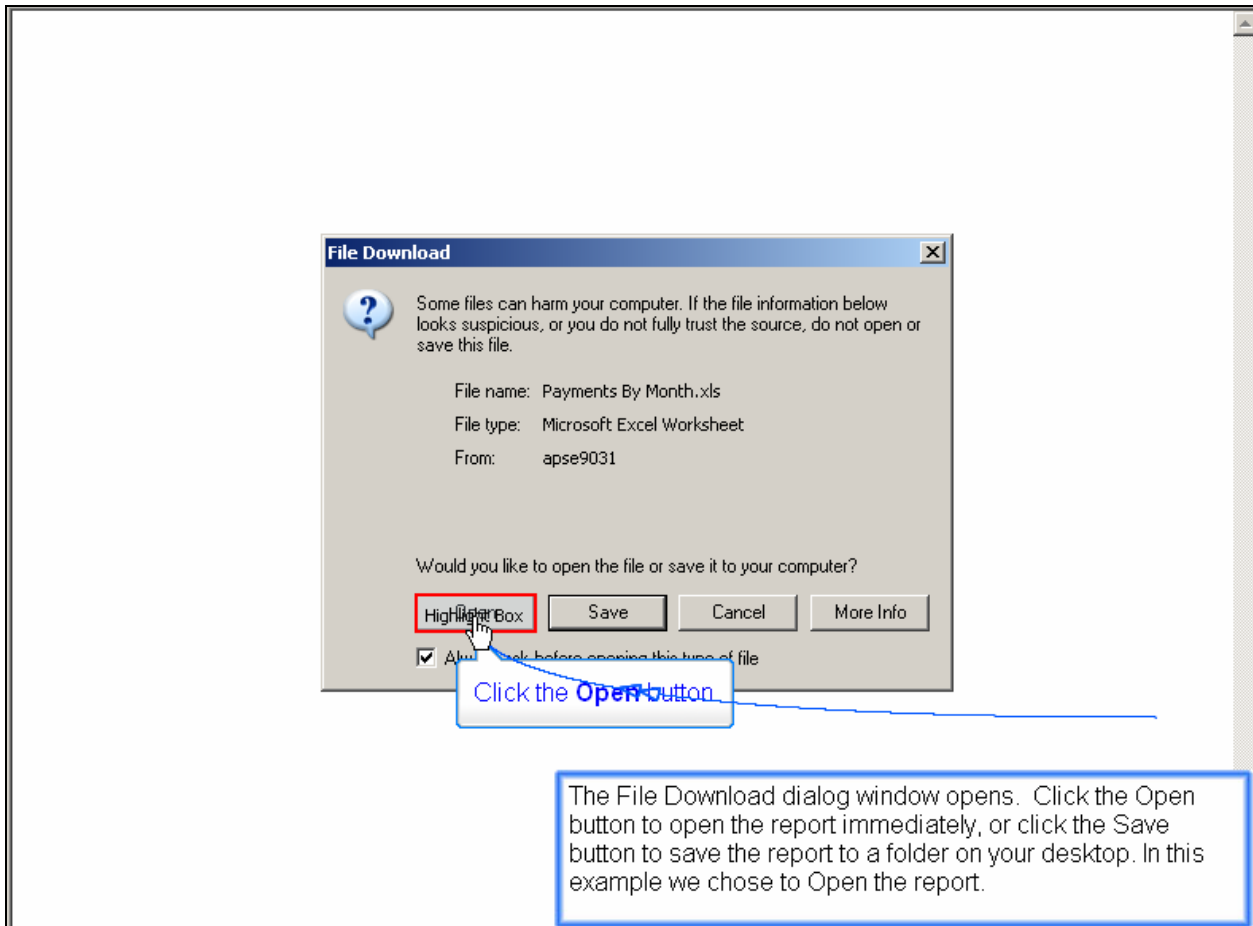
Slide notes

Text Captions

Click the **Export** button

Click the Export button to continue.

Slide 12 - Slide 12



Slide notes

Text Captions

Click the **Open** button

The File Download dialog window opens. Click the Open button to open the report immediately, or click the Save button to save the report to a folder on your desktop. In this example we chose to Open the report.

Slide 13 - Slide 13

Microsoft Excel - Main.aspx [Read-Only]

File Edit View Insert Format Tools Data Window Help Adobe PDF

SnagIt Window 100%

My Report

My Report

Report Filter:
Customer Segment Number In List (000254256, 000255393, 000702096)
and
Benefit Type Category In List (Medical Benefit , Managed Pharmacy Benefit , Dental Benefit , Vision Benefit)
and
Book Year/Month In List (2005-06, 2005-05, 2005-04, 2005-03, 2005-02, 2005-01)

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

Microsoft Excel spreadsheet functions

The report will open as a Microsoft Excel spreadsheet. You can use the spreadsheet functions to manipulate your data.

Slide notes

Text Captions

Microsoft Excel spreadsheet functions

The report will open as a Microsoft Excel spreadsheet. You can use the spreadsheet functions to manipulate your data.

Slide 14 - Slide 14

The screenshot shows a Microsoft Excel window titled "Microsoft Excel - Main.aspx [Read-Only]". The spreadsheet contains a report titled "My Report" with the following data:

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

Callout boxes provide instructions: "Click the 'X' button to close" points to the window's close button, and "The report will open as a Microsoft Excel spreadsheet. You can use the spreadsheet functions to manipulate your data." is located in a box at the bottom right of the spreadsheet area.

Slide notes

Text Captions

Click the 'X' button to close

The report will open as a Microsoft Excel spreadsheet. You can use the spreadsheet functions to manipulate your data.

Slide 15 - Slide 15

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > My Report. A menu bar includes File, View, Data, and Format. The toolbar contains various icons, with the PDF icon highlighted by a red box and a blue arrow pointing to it. The report table below shows data for Book Year/Month, Benefit Payment Metrics, Medical Payments, Managed Pharmacy Payments, Capitation Payments, and Total Payments. The data is as follows:

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

At the bottom of the screenshot, a blue-bordered text box contains the following text:

To export your report as an Adobe Acrobat PDF file, click the PDF icon in the toolbar. This file format is especially useful when you would like to print the report.

Slide notes

Text Captions

To export your report as an Adobe Acrobat PDF file, click the PDF icon in the toolbar. This file format is especially useful when you would like to print the report.

Slide 16 - Slide 16

The screenshot shows the 'PDF Options' window in the Employer eServices application. The window title is 'Employer eServices®' and it has a 'Help' button. The main content area is titled 'My Report' and contains several sections: 'Export:' with a dropdown menu set to 'Whole report'; 'Header and Footer:' with an 'Edit Custom Settings' button; 'Scaling:' with radio buttons for 'Adjust font to 100 % of original size' (selected) and 'Fit to: 1 page(s) wide by 1 tall'; 'Orientation:' with radio buttons for 'Portrait' (selected) and 'Landscape'; and a checked checkbox for 'Print cover page with filter details'. At the bottom, there is a 'Show advanced options' button and a checkbox for 'Do not prompt me again.'. An 'Export' button is located at the bottom right. A blue box with the text 'Select your desired options' has a blue arrow pointing to the 'Export' dropdown menu. Another blue box with the text 'Click the Export button' has a blue arrow pointing to the 'Export' button. A red box highlights the 'Export' button, and a mouse cursor is shown clicking it. A larger blue box at the bottom of the screenshot contains the text: 'The PDF Options window will display. Select the options that best meet your needs and click the Export button to continue.'

Slide notes

Text Captions

Select your desired options

Click the **Export** button

The PDF Options window will display. Select the options that best meet your needs and click the Export button to continue.

Slide 17 - Slide 17

Book Year/Month	Benefit Payment Metrics	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total Payments
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

Slide notes

Text Captions

Click the 'X' button to close

You cannot manipulate your report data when you choose to export as a PDF.

Slide 18 - Slide 18

The screenshot shows the Employer eServices interface. At the top, there is a navigation menu with links for Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > My Report. A menu bar includes File, View, Data, and Format. A toolbar contains various icons for report actions. The main content area displays a table with the following data:

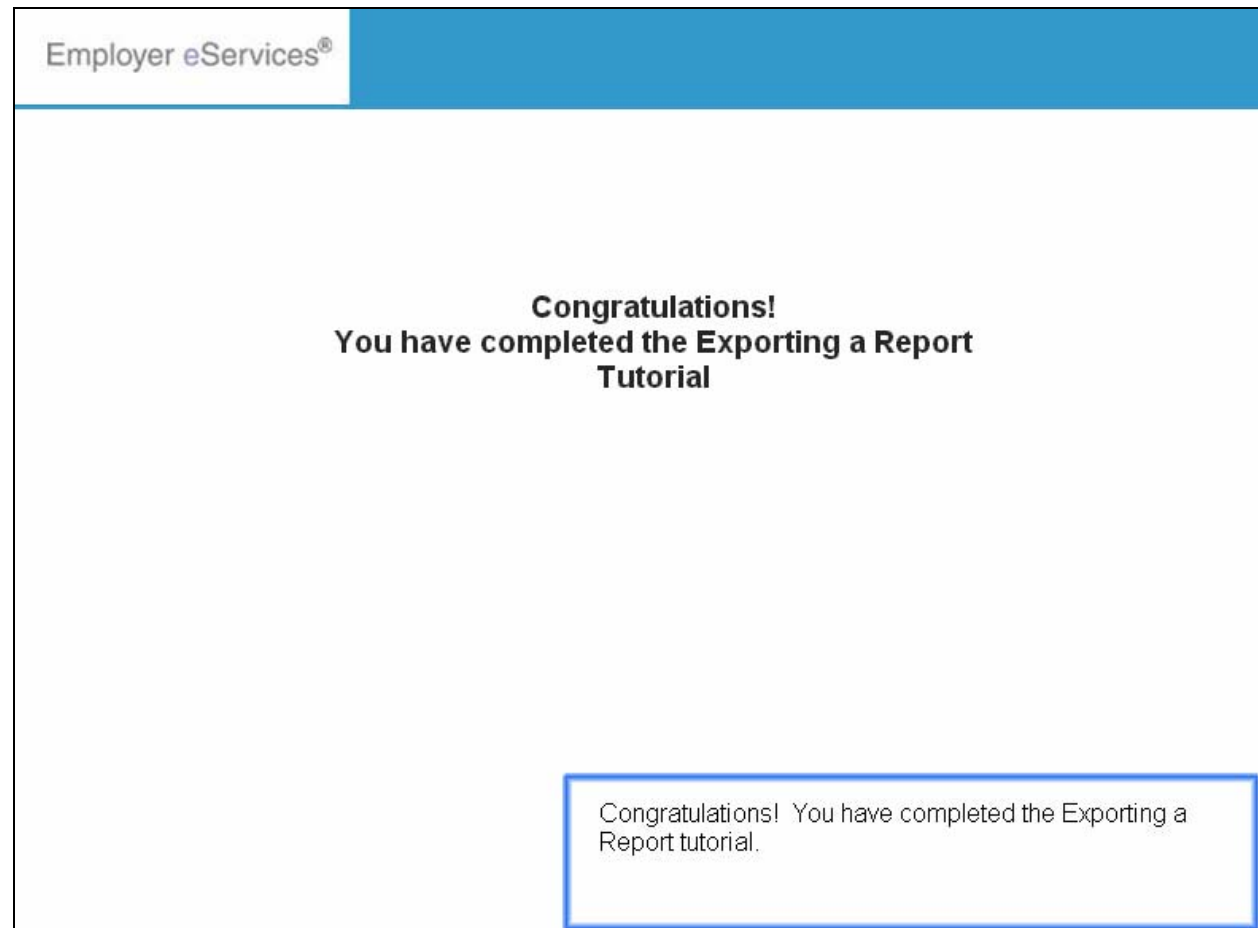
Book Year/Month ▲	Benefit Payment Metrics	Medical Payments ▼	Managed Pharmacy Payments ▼	Capitation Payments ▼	Total Payments ▼
2005-01		\$69,831	\$8,561	\$2,495	\$80,887
Total		\$69,831	\$8,561	\$2,495	\$80,887

Below the table, there is a copyright notice: © 2006 UnitedHealth Group @, Inc. All Rights Reserved. Confidential.

Slide notes

Text Captions

Slide 19 - Slide 19

The slide content area features a blue header bar at the top left with the text "Employer eServices®". The main body of the slide is white and contains the following text centered: "Congratulations! You have completed the Exporting a Report Tutorial". In the bottom right corner, there is a blue-bordered box containing the text: "Congratulations! You have completed the Exporting a Report tutorial."

Slide notes

Text Captions

Congratulations! You have completed the Exporting a Report tutorial.

Slide 20 - Slide 20

Employer eServices®

Congratulations!
You have completed the Exporting a Report Tutorial

Online Training Feedback

Please take a moment to provide feedback on this tutorial.

Slide notes

Text Captions

Please take a moment to provide feedback on this tutorial.