Employer eServices®	
Importing	Welcome to the Group Segment Filters Tutorial
Audience: Employers & Brokers Module Length: Approximately 5 Min Last Updated: July 11th, 2007	nutes
	Welcome to the Importing Group Segment Filters tutorial. In this tutorial, you'll learn how to define your population using Microsoft Excel, and import this information into the Customer Reporting Site.

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Let's get started. To begin, click the Tools menu option from the Reports Home page.

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Reports Home Automated Reports Custom Reports	Recent Reports	Help & Training	News	Tools	Logo	
Reporting Tools						
Group Segment Filters						
Group Segment Filters make it easier to run reports on pre-define part of your organization (e.g. hourly vs.salaried employees, East Coast vs ' installation as " <u>customer structure</u> " to create filters that identify one or mor	ed portions of your org West Coast, etc)? Leverag e of these units. Then, use	anization. Do you want e the business units you e the filters to create the	reports tha defined dur focused rej	at focus on ing case ports you i	n one need.	=
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Create or modify a Group Segment FilterHelp						
Import a Kinhlighersmeht Filter						
Share a Grou	Barta					
Click the Import a Group Segment Filter	link					
Report Templates						_
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Learn how to create and use templates						
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Modify Preferences						

The Reporting Tools page displays. Click the Import a Group Segment Filter link.

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ECR > Import a Group Segment Filter					
		<u>G</u>	roup Segr	<u>ment Filte</u>	<u>r Home</u>
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The Import a Group Segment Filter page displays. This page allows you to import a Group Segment Filter previously created in Microsoft Excel.

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Note that filters must be built using a pre-formatted Excel template to import successfully. To access this template, click the Download Template link.

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Adding an optional filter description will help keep your filters organized.

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template to import successfully. If your filter is not already setup, g	download the template, enter your filter information, save the file, a
click the Browser button to locate it. <u>Help</u>	
* Path: C:\Documents and Settings Browse	
Step 2: Name and Describe the Filter	
Type a name and a brief description into the fields below to identify	the filter, and then click the Import button to upload the file. Once
report or you can edit it from the Group Segment Filter Screen. <u>He</u>	
Test Eiller	-
* Filter Name: 1990 Filter	
Filter Description:	
* Required Field	
Congratulations! Your fillioneras successfully imported.	
congratations four (ngnight dat saccessian) imported	
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	A message at the bottom of the page will confirm that
	your seament filter has been successfully imported
	,

A message at the bottom of the page will confirm that your segment filter has been successfully imported.

Employer eServices®							
Reports Home Automated Reports Custom Reports R	ecent Reports Help & Training News Tools Logou						
ECR > Import a Group Segment Filter							
	Group Senghinght Böter Home						
Import a Group Segment Filter	Click the Group Segment Filters Home link						
Fhis page lets you create a Group Segment Filter by importing a file Fhis process lets you define a segment of your population offline in	that Excel, and import them for your reporting needs. <u>Help</u>						
Step 1: Locate the File to Import							
Click the Browse button to locate the Excel (.xls) file containing the template to import successfully. If your filter is not already setup, <u>d</u> click the Browser button to locate it. <u>Help</u>	filter you have built. Filters must be built using the preformatted Ex ownload the template, enter your filter information, save the file, a						
* Path: C:\Documents and Settings Browse							
Step 2: Name and Describe the Filter							
Type a name and a brief description into the fields below to identify imported, you can use the filter to run a report or you can edit it from	the filter, and then click the Import button to upload the file. Once n the Group Segment Filter Screen. <u>Help</u>						
* Filter Name: Test Filter							
Filter Description: Import Filter Test							
* Required Field							
Import Cancel	Your newly imported filter can now be found on the						
	Group Segment Filters Home page.						
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Your newly imported filter can now be found on the Group Segment Filters Home page.

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Reports Home Automa	ted Reports	Custom Reports	Recent Reports	Report Admin	Help & Training	News T	
ECR > Group Segment Filter							
Create New Group Segment Filter						R	
(*)Name:		Description:		Create			
Search For Existing Filter: Search							
<u>My Filters</u>		Descrip	tion	Modified			
🗴 💿 <u>Test Filter</u>		Highlight Elwaport Filter		06/06/2007			
* Total Filters In This Folder: 1 Sort list: Click on My Filters or Modified column labels to sort.							
<u>My Incomplete Filters</u>		Description		Modified			
Your Filter Inbox is empty.							
* Total Filters In This Folder: O Sort list: Click on My Filters or Modified column		Your newly i Create and	Your newly imported filter can now be found on the Create and Modify Group Segment Filters page.				

Your newly imported filter can now be found on the Create and Modify Group Segment Filters page.

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Congratulations! You have completed the Importing Group Segment Filters Tutorial					
	Congratulations! You have completed the Importing Group Segment Filters tutorial.				

Congratulations! You have completed the Importing Group Segment Filters tutorial.