Employer eServices®

Welcome to the
Sharing Group Segment Filters Tutorial

Audience: Employers & Brokers

Module Length: Approximately 3 Minutes

Last Updated: July 11th, 2007

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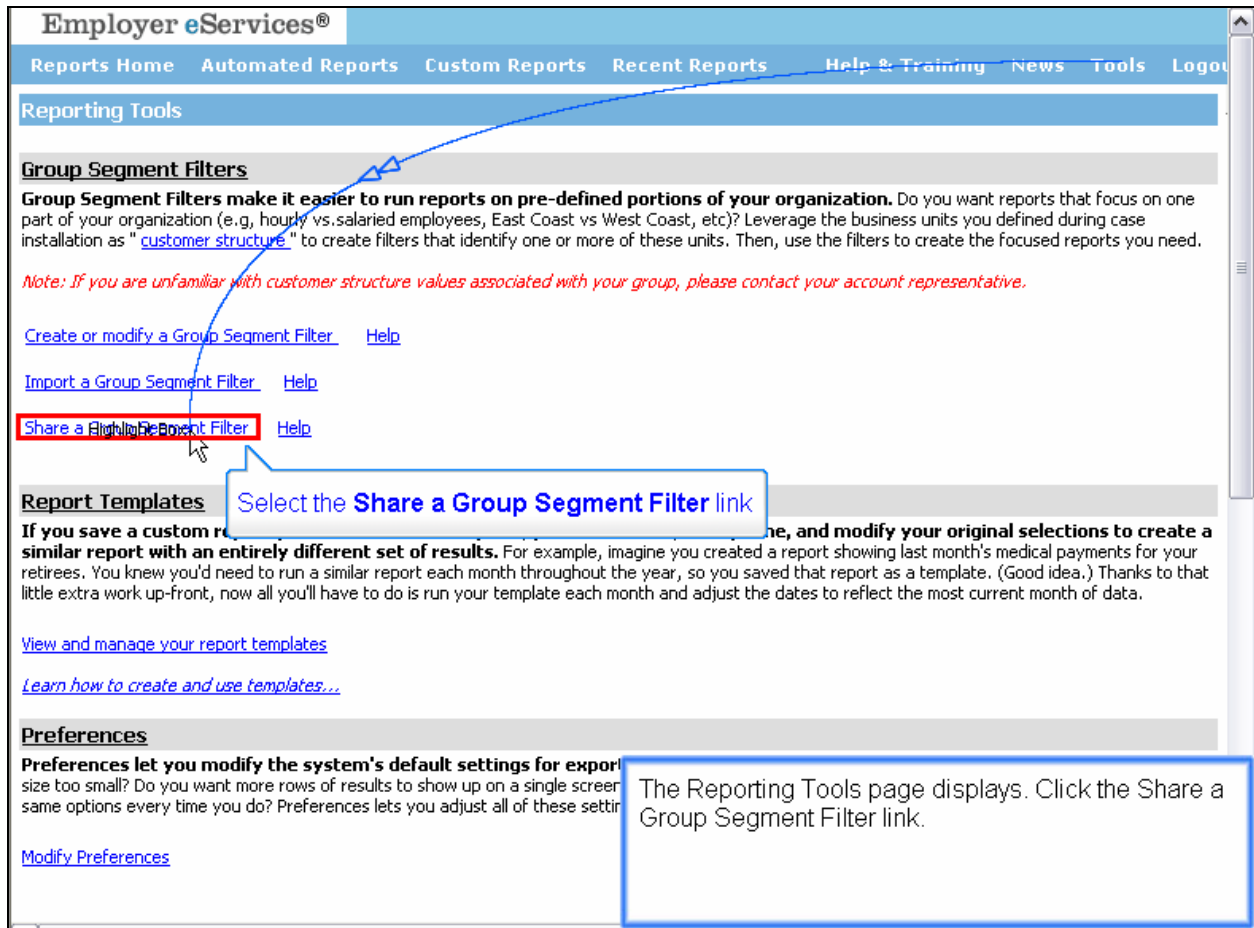Audience: Employers & Brokers

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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.

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

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

Share a Group Segment Filter

This page lets you share a Group Segment Filter (GSF) with anyone who uses eServices Customer Reporting. Sharing filters alleviates th of duplicate work efforts, and lets you work more collaboratively across your team.   Help

Step 1: Select a Group Segment Filter to Share

Click the name of the filter you want to share from the list below. The filter you choose will appear in the **Selected GSF** field. Only 1 se permitted. Help

Test Filter	Import Filter Test
Home Office Employees	Testing #2
Sales & Marketing	Divisions 2 and 3 Only

Selected GSF:

Step 2: Identify the Person to Share this Filter With

Type a User ID into the field below, and click the **Find User** button. The name of the person associated with the ID will appear in the **Se** confirm this is the person with whom you want to share the filter. If it is correct, click the **Share** button. IDs are case sensitive. To obta User ID, you must contact that person directly. Help

User ID: [   ]   [Find User]

Selected User: [   ]

[Share]   [Cancel]

The Share a Group Segment Filter page displays.

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Select the filter you would like to share with another Customer Reporting user from the list in Step 1. Note that only one filter may be selected at a time.

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User ID: Highlight Box   Find User

Selected User:

Share   Cancel

Next, identify the User ID of the individual you would
like to have access to the selected filter. To obtain a
person's User ID, you must contact that person directly.

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User ID: sdemeul4   Find User Box

Selected User:

[Share]   [Cancel]

Click the **Find User** button

When you have finished, click the Find User button.

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The user's full name appears in the Selected User field. If this is the correct individual, click the Share button.

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User ID: sdemeul4   [Find User]

Selected User: Shannon Demeulemeester

[Share]   [Cancel]

Congratulations! Your filter was successfully sent to sdemeul4

A message appears at the bottom of the screen to confirm that your filter has been shared. The filter you have shared will now appear in the My Filters list for the receiving user.

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Congratulations! You have completed the Sharing Group Segment Filters tutorial. In this tutorial, you learned how to save time and effort by sharing Group Segment Filters with other colleagues.