

## Reporting Groups

This section is accessed via the **Sharing Group Profile** screen. (See Figure 1-12)

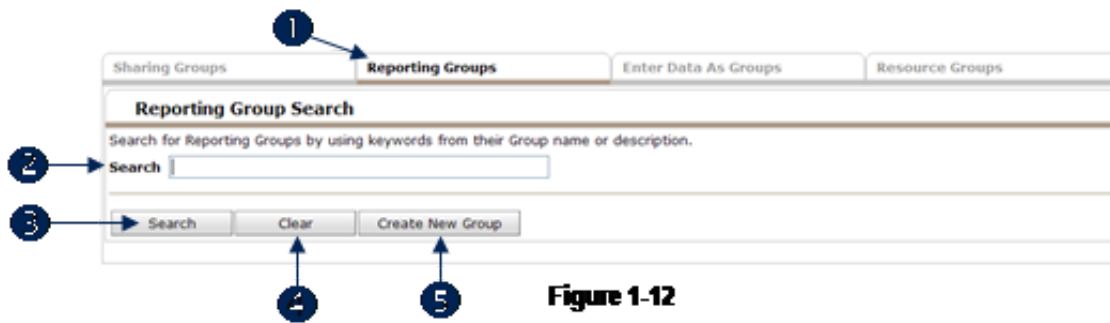


Figure 1-12

1. Click **Reporting Groups** to move into this area. **(1)** To locate a reporting group, enter key words in the **Search** field **(2)** and click **Search**. **(3)** Keywords may be words in the group's name or words found in the group's description. Click **Clear** to empty the search field and begin a new search. **(4)** Click **Create New Group** to add a reporting group. **(5)** (See Figure 1-13)

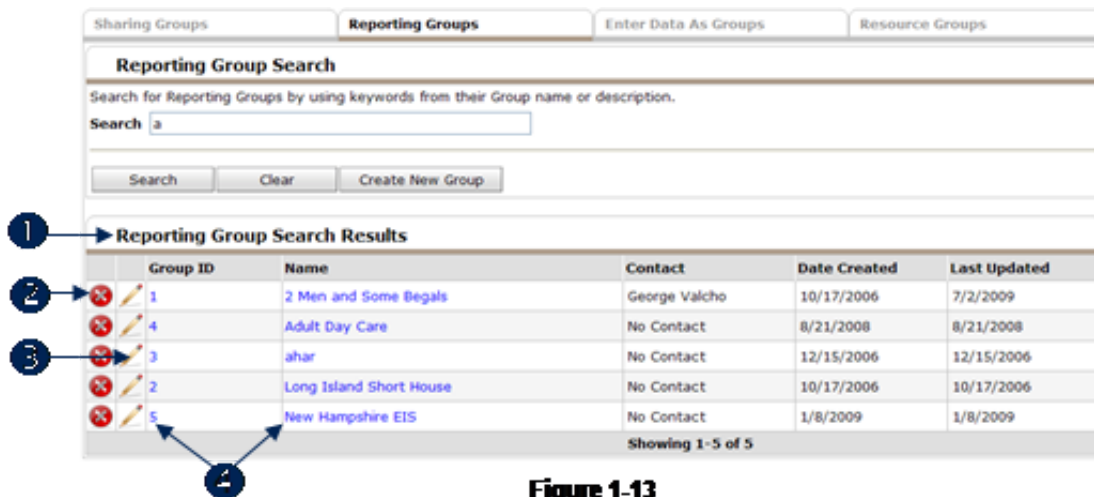


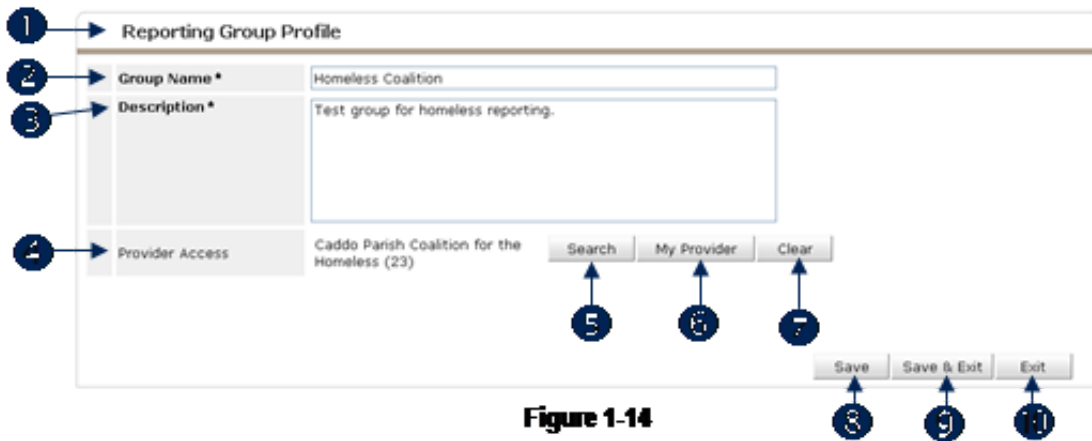


Figure 1-13

2. After initiating a search, **Reporting Group Search Results** displays. **(1)** Click the **Red X** icon  to delete a reporting group (a confirmation screen will display). **(2)** Click the **Edit** icon  **(3)** or the **Name** or **Group ID** **(4)** to modify the selected group. (See Figure 1-14)

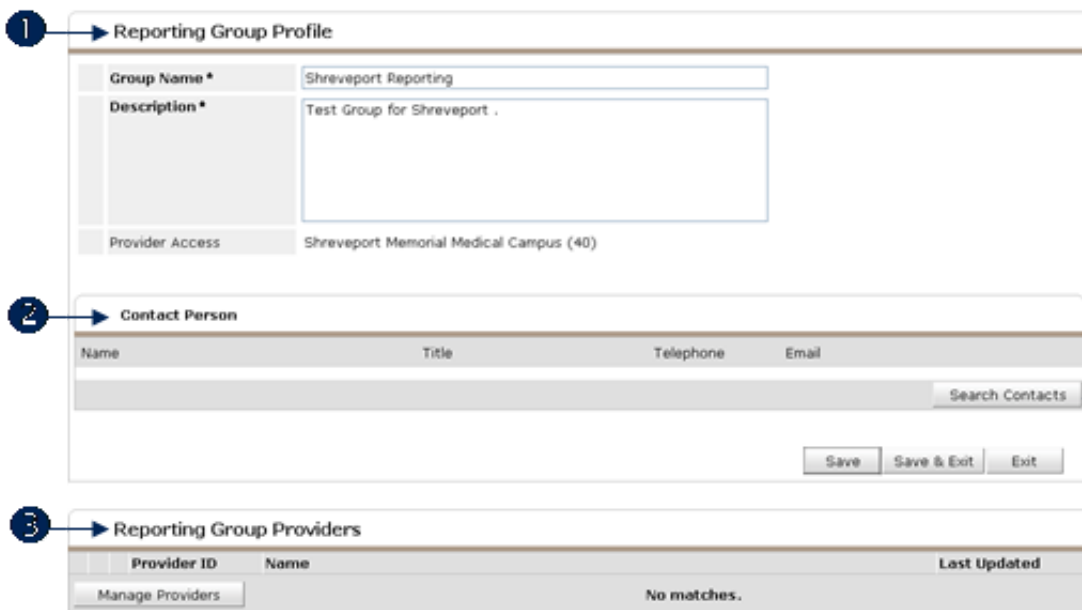


**Figure 1-14**

- When adding a new reporting group (after clicking **Create New Group**) the **Reporting Group Profile (1)** screen (Figure 1-14) will display. Enter a **Group Name (2)**, and a **Description (3.)** To set the **Provider Access** field **(4)** click **Search (5)** to select a provider using the standard *ServicePoint* provider search, or click **My Provider (6)** to assign the user’s provider. Click **Clear (7)** to reset the field. **Provider Access** limits the use of the reporting group to a provider and subordinate providers.

**Note:** *Provider Access cannot be altered after the reporting group record is saved.*

- Click **Save (8)** to retain the entered information. Click **Save & Exit** to retain the information and return to the previous screen. **(9)** Click **Exit** to return to the previous screen without retaining the entered information. **(10)** (See Figure 1-15)



**Figure 1-15**

- After adding a reporting group, or when a reporting group is accessed in edit mode (by clicking the **Edit** icon), the

**Reporting Group Profile (1)** will include **Contact Person (2)** and **Reporting Group Providers. (3)**

- Click **Search Contacts (4)** to assign a contact to the reporting group. This feature informs users of the person responsible for maintaining the group. (See Figure 1-16)



Figure 1-16

- In **Select Contact Person (1)**, enter a user's name in the **User Search** field. **(2)** Click **Search** to generate a list of users. **(3)** Click **Clear** to reset the **Search** field. **(4)** Click **Exit** to return to the previous screen. **(5)** (See Figure 1-17)

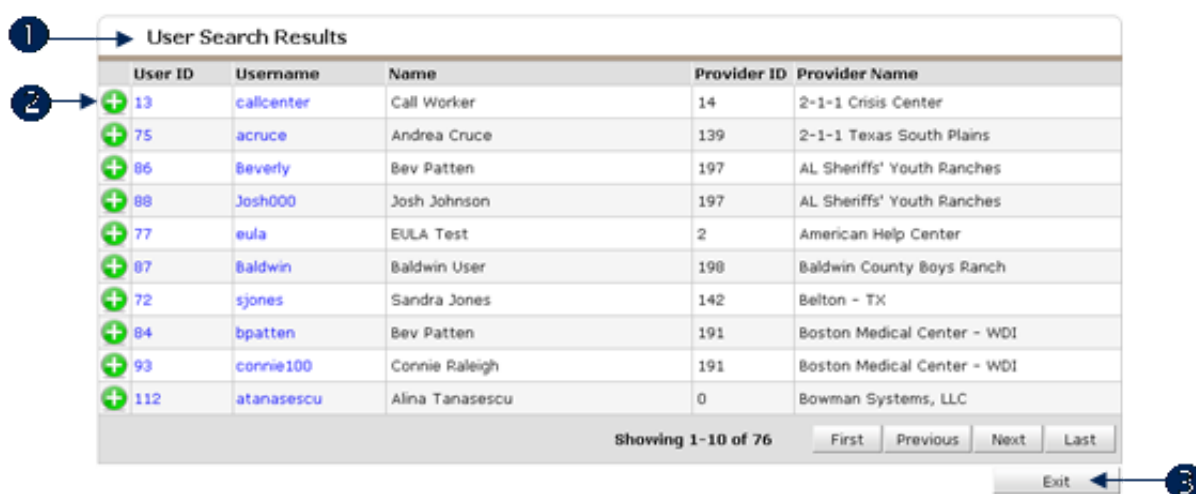


Figure 1-17

- In **User Search Results (1)** click the **Green Plus icon (+)** to assign a user to the group. **(2)** Use **First, Previous, Next, and Last** to navigate the search results. Click **Exit** to return to the previous screen. **(3)** The **Contact Person** will be displayed. (See Figure 1-18)

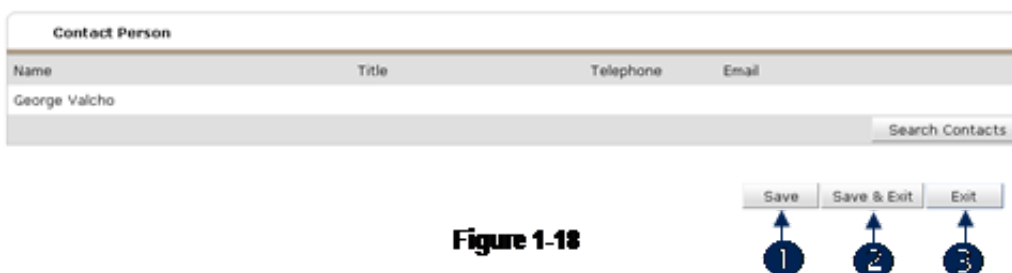
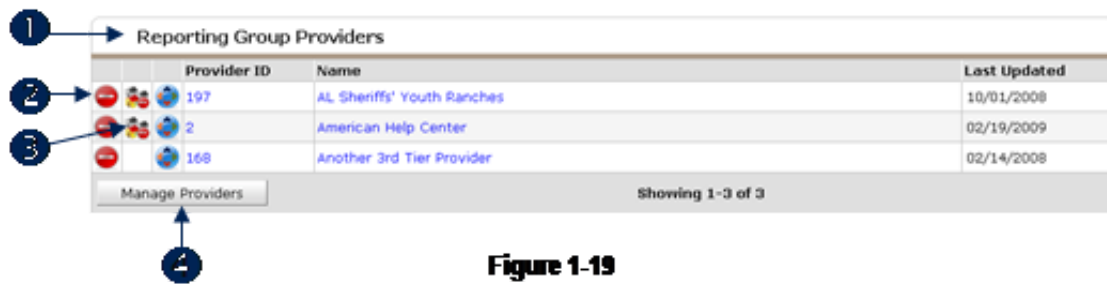




Figure 1-18

- Click **Save** to retain the **Contact Person**. **(1)** Click **Save & Exit** to retain the **Contact Person** and return to the previous screen. **(2)** Click **Exit** to return to the previous screen without retaining the **Contact Person**. **(3)** (See Figure 1-19)



**Figure 1-19**

10. A list of providers contained in the reporting group is display in the section labeled **Reporting Group Providers**. **(1)** In this area, the **Red Minus** icon  **(2)** and the **Group Minus** icon  **(3)** are available for removing one provider or a group of providers from the reporting group. Click **Manage Providers** **(4)** to add or modify providers associated with the reporting group.
11. The functionality associated with managing the providers in the group is fully described in the [Provider Groups – Manage Providers](#) section of the help file.