Quick Reference: DocumentDirect (DDI) Reports Training

This document introduces you to report functionality, including navigating, viewing, downloading, and printing your DocumentDirect (DDI) reports.

How to navigate to and view your reports:

1. Click the document server icon next to Reports.

A list of reports displays.

NOTE: This example may not show all the available reports.

(Continued on the next page)
2. Click the **Expand** icon next to the report ID you want to view and a list of the date/time versions available for the report displays.

   NOTE: The most recent date/time report version will always appear at the top of the expanded list.

   NOTE: Click the **Collapse** icon next to the report ID to collapse the list.

3. Click the **icon** next to the report section you want to view. The code that displays can be a school or lender code depending on the report that is being accessed.

The report detail displays for viewing, saving, downloading and printing.
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Report Navigation

The icons located at the top of a report can be used to help navigate through the report. Hovering your cursor over the icon will show you the action associated with that icon. See the appendices for report and document icon descriptions.

How to locate a report page

1. Click the Previous Page and Next Page buttons to navigate between pages in a report.

2. To go to a specific page, click the Go To button.

   The Go To window displays.

3. Type a page number and click the OK button. This will open the specific page of the report.

4. Click the View button to resize your open report.

   The View window displays.

(Continued on the next page)
5. Select the report image settings you desire and click the Refresh button to change the report image view.

6. Click the Format button to select the format view.

   The Format window displays.

   ![Format Window]

7. Select the HTML or PDF format and click the Refresh button to change the report file format.

How to Search for Text within a Report

1. Click the Find button.

   The Find window displays.

   ![Find Window]

2. Type the search text exactly as it appears on the report. Then, select the appropriate search options, and click the Find button.

   (Continued on the next page)
3. The first occurrence of the search text will display on the report page with the specified text highlighted.

<table>
<thead>
<tr>
<th>ACCT</th>
<th>ACCT DESCRIPTION</th>
<th>PLANNED MTD</th>
<th>ACTUAL MTD</th>
<th>VARIANCE MTD</th>
<th>PLANNED YTD</th>
<th>ACTUAL YTD</th>
<th>VARIANCE YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>820001</td>
<td>DATA PROCESSING</td>
<td>1,740</td>
<td>2,048</td>
<td>1,308</td>
<td>16,601</td>
<td>20,881</td>
<td>15,279</td>
</tr>
<tr>
<td>830001</td>
<td>ELECTRICITY</td>
<td>2,934</td>
<td>3,607</td>
<td>1,654</td>
<td>19,832</td>
<td>25,368</td>
<td>15,536</td>
</tr>
<tr>
<td>835000</td>
<td>EMPLOYEE BENEFITS</td>
<td>2,935</td>
<td>5,251</td>
<td>2,297</td>
<td>20,325</td>
<td>31,091</td>
<td>28,966</td>
</tr>
</tbody>
</table>

NOTE: Select the appropriate option button to specify the direction in which you want to search the report (Up [toward the top of the report] Down [toward the bottom of the report]).

4. Click the Find Next button to search for the next occurrence of the specified text. The search text will be retained until a new search string is entered.

5. For additional filter options, click on the Filter by Line icon.

6. Enter the filter data and click on the OK button.

7. The filtered data that you selected will display at the bottom of the screen.
   You can print, export, delete selected items, select columns, and edit filter criteria.
How to print reports

Troubleshooting Tip:
Depending on the configuration of your computer and your security access level, DDI may automatically download a print utility to your PC. If the print utility download process fails, have your system administrator log in to your PC as an Administrator and print the first report to activate your print utility. You must have Admin rights to the PC to print for the first time and install the print driver.

1. Click the Print Pages button or the Quick Print button at the top of the report window.
   - The Print Pages button allows you to print with the ability to make print adjustments and modifications.
   - The Quick Print button allows you to use the default print settings.

2. If you click the Print Pages button, the Print window displays.
   - Click the Print button, and the report is sent to your local printer.

   Select the page range and print options.

   Select the Print utility icon to print to your specific printer.

   Selecting Page setup icon or Font setup icon will allow you to customize

   Click the Print button.

   Click the Print button, and the report is sent to your local printer.

   NOTE: The Include presentation elements checkbox at the bottom of the Print window is selected by default. When this option is selected, the report will print as it appears online, with all available print overlays, such as background shading. If this option is not selected, the report text and data will be printed without the print overlays.

   NOTE: If you click the Quick Print option, the default page orientation is Portrait and cannot be changed.
How to Download Reports Automatically into Excel

DDI Reports can be automatically downloaded into Excel by using the “Selected data using policy” option. **Note:** This option may not be available on all reports.

1. Click the Download Pages button located at the top of the report window. (see above)
2. From Pages - Select Current Section.
3. Choose - Selected data using policy.
4. Uncheck - Compress into Zip archive.
5. Select the Create button to download the report.
6. Report will automatically download to a CSV format.
Other Download Options

Click the Download Pages button located at the top of the report window.

**Note:** It is recommended that you select Text or PDF as your “Download as” format, because the HTML format will download each page of the report as a separate document.

**Note:** The Compress into ZIP archive format is selected by default. This compresses the report into a ZIP file, enabling a quicker download and is ideal for multiple report downloading.

**Note:** The extension you type (TXT, DOC, CSV, or XLS) in the Change File Extension field will cause the report to open in the associated application.
How to import a report into Microsoft Excel

1. Open Excel.
2. Open the saved report file.

The Text Import Wizard Step 1 screen displays

3. Select the Delimited option and click the Next button.
   NOTE: You also have the option to import your data using Fixed Width.

(Continued on the next page)
The Text Import Wizard Step 2 screen displays.

4. Select the delimiters of Tab and Comma, and then click the Next button.

(Continued on the next page)
The Text Import Wizard Step 3 screen displays.

5. Select the General column data format and then click the Finish button.

The report will open in Excel and you can adjust the report as needed.
The buttons on the icon bars identify the functions available to you in the DDI application. This section presents a graphic, name, and function of each button on the Document Tree icon bar and the Report icon bar.

### Document Tree Icons

<table>
<thead>
<tr>
<th>Graphic</th>
<th>Icon Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Locate]</td>
<td><strong>Locate</strong></td>
<td>Opens the <em>Locate</em> window.</td>
</tr>
<tr>
<td>![Quick Open Selected Document]</td>
<td><strong>Quick Open Selected Document</strong></td>
<td>Expands the contents of selected item and opens the first page of the first report.</td>
</tr>
<tr>
<td>![Refresh Enterprise Explorer]</td>
<td><strong>Refresh Enterprise Explorer</strong></td>
<td>Updates the report lists to display any newly-stored content. Also removes deleted content without requiring a new login.</td>
</tr>
<tr>
<td>![Print Selected Document]</td>
<td><strong>Print Selected Document</strong></td>
<td>Prints selected reports without opening them. Document options are available.</td>
</tr>
<tr>
<td>![Download]</td>
<td><strong>Download</strong></td>
<td>Downloads selected reports without opening them. Format and directory options are available.</td>
</tr>
<tr>
<td>![New Personal Folder]</td>
<td><strong>New Personal Folder</strong></td>
<td>Creates a new folder for personal report storage.</td>
</tr>
<tr>
<td>![Delete]</td>
<td><strong>Delete</strong></td>
<td>Deletes selected folders. <strong>Note:</strong> You can only delete Personal folders.</td>
</tr>
<tr>
<td>![Copy to Personal Folder]</td>
<td><strong>Copy to Personal Folder</strong></td>
<td>Copies the currently selected report to a personal folder. Pop-up window allows folder selection.</td>
</tr>
<tr>
<td>![Move to Personal Folder]</td>
<td><strong>Move to Personal Folder</strong></td>
<td>Copies the currently selected report into another folder.</td>
</tr>
<tr>
<td>![Preferences]</td>
<td><strong>Preferences</strong></td>
<td>Opens the <em>Preferences</em> window displaying viewing and folder preference options.</td>
</tr>
<tr>
<td>![Help]</td>
<td><strong>Help</strong></td>
<td>Opens the <em>DDI Help</em> window.</td>
</tr>
<tr>
<td>![Log Off]</td>
<td><strong>Log Off</strong></td>
<td>Logs the user off of DDI and returns them to the Access System Reports page.</td>
</tr>
</tbody>
</table>

*(Continued on the next page)*
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## Report Icons

<table>
<thead>
<tr>
<th>Graphic</th>
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<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous Document</td>
<td>Goes to the previous report in the document tree. Only valid for like versions of the same report.</td>
</tr>
<tr>
<td></td>
<td>Next Document</td>
<td>Goes to the next report in the document tree. Only valid for like versions of the same report.</td>
</tr>
<tr>
<td></td>
<td>Previous Page</td>
<td>Goes to the previous page of an open report.</td>
</tr>
<tr>
<td></td>
<td>Next Page</td>
<td>Goes to the next page of an open report.</td>
</tr>
<tr>
<td></td>
<td>Go To</td>
<td>Opens the Go To window that allows you to jump to a specific page.</td>
</tr>
<tr>
<td></td>
<td>Find</td>
<td>Finds specific text within an open report.</td>
</tr>
<tr>
<td></td>
<td>Find Next</td>
<td>Finds the next occurrence of a specific text search.</td>
</tr>
<tr>
<td></td>
<td>Filter By Line</td>
<td>Specifies the criteria for displaying a filtered view of the report based on text in the document.</td>
</tr>
<tr>
<td></td>
<td>Download Pages</td>
<td>Downloads an open report. Format and directory options are available.</td>
</tr>
<tr>
<td></td>
<td>Print Pages</td>
<td>Prints an open report. Size and quantity options are available.</td>
</tr>
<tr>
<td></td>
<td>Quick Print</td>
<td>Prints an open report without the ability to make option modifications.</td>
</tr>
<tr>
<td></td>
<td>View</td>
<td>Provides document resizing and folder location options.</td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td>Provides option to select HTML or PDF format.</td>
</tr>
<tr>
<td></td>
<td>Help</td>
<td>Opens the Help window.</td>
</tr>
<tr>
<td></td>
<td>Close Document</td>
<td>Closes current report.</td>
</tr>
</tbody>
</table>