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About DocumentDirect® for the Internet

DocumentDirect for the Internet (DDI) is a service offered by Sallie Mae® that allows you to view reports online. Please follow the instructions in this guide, and you will be on your way to a faster, more efficient way to view, print, and download your report information.

The DDI tool is used by Schools, Lenders, Collection Agencies, and Servicers. DDI access and use information for all of these customer types is contained in this document.
Technical Requirements & Java Version

Technical Requirements

ASG-DocumentDirect for the Internet 4.6.1 Support Matrix
Updated: June 18, 2015

NOTE: DocumentDirect for the Internet 4.6.1 is a 64-bit application and requires a 64-bit operating system, application server, and JVM to function.

DocumentDirect for the Internet Client Browser Versions

The table below lists the browser, browser versions, operating systems and respective Java Runtime Environment (JRE) versions supported.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Browser</th>
<th>JRE Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 7</td>
<td>Internet Explorer 9</td>
<td>Java 8 update 45</td>
</tr>
<tr>
<td>Windows 8</td>
<td>Internet Explorer 10</td>
<td>Java 7 update 79</td>
</tr>
<tr>
<td>Windows 8.1</td>
<td>Internet Explorer 11</td>
<td>Java 8 update 45</td>
</tr>
<tr>
<td>Windows 2012</td>
<td>Internet Explorer 11</td>
<td>Java 7 update 79</td>
</tr>
<tr>
<td>Windows 8.1 R2</td>
<td>Internet Explorer 10</td>
<td>Java 7 update 79</td>
</tr>
<tr>
<td>Windows 2012 R2</td>
<td>Internet Explorer 9</td>
<td>Java 8 update 45</td>
</tr>
</tbody>
</table>

Notes:
1. A 32-bit operating system must run a 32-bit browser. A 64-bit operating system may run 32-bit or 64-bit browsers.
2. DocumentDirect for the Internet is designed to run in Microsoft Internet Explorer with default Compatibility settings selected by the browser as the site loads. Manually changing compatibility or "quirks" mode is not supported.
3. It is expected that Google Chrome and Mozilla Firefox browsers will be allowed to automatically update. ASG will periodically re-certify with the latest versions, however, we expect new versions to be backwards compatible. Our most recent certifications were completed on Google Chrome version 43, and Mozilla Firefox version 38,39.
4. ASG performs full browser certifications on Microsoft Client operating systems, e.g., Windows 7, 8, and 8.1. The matching server operating systems support the same browsers and the same behavior should be expected under most circumstances.
5. Internet Explorer 9 is not supported on Windows 8.1 and Windows 2012 R2.
6. Internet Explorer 11 is not supported on Windows 8 and Windows 2012.
7. All Microsoft Windows / Internet Explorer certifications were completed with all Microsoft Critical Updates for Windows, Internet Explorer, and .NET released as of 6/1/2014. In particular, KB2898785 was required or IE 10 would function improperly. It is expected these changes will be included in all future cumulative security updates for Internet Explorer.
8. Features that are implemented as ActiveX controls in Internet Explorer work differently in Chrome and Firefox. For Printing, the system dialogs are not available. For Find Text within a PDF, hit highlighting is not enabled.
9. Oracle updates Java on a quarterly basis (sometimes more frequently). When the next version of Java is released, or three months after release for systems without internet access, Java “expires”. DocumentDirect for the Internet will not function with an expired version of Java. If you encounter this scenario, please contact ASG Customer Support for assistance.

10. Starting with Version 42 (released April 2015), additional configuration is required to allow the Java Plugin to work in Chrome. See the Oracle site for how to enable the Java Plugin or contact ASG Support.

11. For the Internet Explorer 64 Bit Browser, Acrobat Reader XI must be installed since it includes an Adobe Reader 64 Bit Plugin.

Note: Various functions described in this document may differ slightly depending on the browser you are using. For example, if you receive the Warning - Security window, click Yes to proceed.
Java Version

**Note:** When launching DDI for the first time, you may be prompted to install the correct version of Java. **You must have Administrative rights to your PC to install Java.** If you do not have Administrative rights, please contact your internal technical department to arrange for the Java installation or upgrade. The Administrator will also have to print a test page in order for the print driver to successfully install.

If you try to access DDI and do not have the required Java version, a warning message similar to the one below displays.

![Java File Download window](image)

You can click the **Run** button and follow the instructions on the screen to install Java or click the **Cancel** button and contact your internal technical department about Java. **Note:** If Microsoft Internet Explorer is set to install ActiveX content without displaying a prompt, the high-resolution printing will be enabled automatically the first time you print. If Microsoft Internet Explorer is set to prompt you before installing ActiveX content, you must enable high-resolution printing manually.

To enable high-resolution printing:

1. Display a report in DDI.
2. Click the **Print** button within the report toolbar.
3. Click the **Yes** button on the **Security Warning** pop-up window. The high-resolution printing function is downloaded to your computer, and the selected document is printed with high resolution.
4. Verify that high resolution printing is enabled by opening the Downloaded Program Files subdirectory, usually found in C:\Windows\Downloaded Program Files. If you find DDIPRINTCONTROL CLASS or PrintEngine Active X control v4.4 in that subdirectory, high-
resolution printing has been enabled.

**Note:** Admin access to your computer is required to install this application. For additional instructions on loading the print driver engine, go to [https://www.salliemae.com/techdocs/ddi](https://www.salliemae.com/techdocs/ddi) and click on the **DDI Print Driver Instructions** selection.

---

DocumentDirect 4.6.1 for the Internet page

**Note:** Logging In, Viewing and Downloading Reports and the DDI Reference guide are available under the Training section on this page.
Accessing DocumentDirect for the Internet

- From https://ddi.salliemae.com
- From OpenNet Web Loan Delivery home page www.opennet.salliemae.com
- From OpenNet Web Loan Delivery main menu (after logging into OpenNet).

Logging in, Retrieving your ID, and Resetting Passwords

1. Type the following URL into your Web browser’s Address field: www.opennet.salliemae.com
   NOTE: The same URL is used for both school and lender login.
   Note: You may also log in directly to DDI by typing in https://ddi.salliemae.com

2. Under the School or Lender section header on the OpenNet entry page, click the OpenNet Web Loan Delivery System link.

3. You may also click the Download Reports (DDI) link under each section to navigate to a specific DocumentDirect page for login.
The first time you log in, you will have to complete the following steps as part of the enhanced security feature. After your initial log in, however, you will not have to complete these steps again.

4. Type your User ID and Password, and then click the Log In button.

5. Read and accept website terms of use information. Click the I Accept button.
6. Use the **New Password** and **Confirm New Password** fields to set and confirm a new password.

7. Provide the phone number at which you can be contacted in the **Telephone** field. You may choose to enter your personal cell phone or your office phone.

8. Select and answer five challenge questions that are used to verify your identity in certain security situations.

9. Click the **Submit** button.
10. Confirming that the reset has been successful and click the **Continue** button.

![OpenNet Account Reset page](image)

**OpenNet Account Reset page**

Note: If you logged into OpenNet Web Loan Delivery, the OpenNet Home Page displays. From this you can access your DDI reports.

11. Click the **Servicing** tab.

12. Click **View/Download Reports.**

Or you may access DDI this way-

11. Click **Inquiry/Reporting.**

12. Click **Download Reports (DDI).**

![Sallie Mae OpenNet Web Loan Delivery System page](image)

**Sallie Mae OpenNet Web Loan Delivery System page**
Note: A Resource page will display for several seconds before launching the DDI application. If you would like to access the training information, simply select any of the links that display.

13. If you accessed the Resource Library you will need to log in again. Click Launch DDI or Document Direct for the Internet link to log back into DDI.
The DDI application opens.

![Enterprise View]

DDI version 4.6.1
After Your First Log-In

After your first log in, you will only have to complete the steps listed below to access DDI.

1. Type in your User ID and Password.

2. Click the Log In button.
Retrieving Your User ID

If you forget your user ID, you may retrieve it. To retrieve your user ID:

1. Click the **Forgot User ID** radio button on the Log-In page.

   ![Log-In page](image)

   Log-In page

2. Click the **Continue** button.

   The Forgot User ID page displays.

   ![Forgot User ID page](image)

   Forgot User ID page

3. To obtain your user ID, contact your institution’s administrator or your designated Sallie Mae representative.
Resetting Your Password

To reset your password:

1. Click the **Forgot Password** radio button on the Log-In page.
2. Click the **Continue** button.

   The Forgot Password page displays.

3. Type in your **User ID** and **Email Address**.
4. Click the **Submit** button.
The Answer Challenge Questions page displays.

![Answer Challenge Questions page](image)

5. Answer the challenge questions.

6. Click the **Submit** button.

The Password Information page displays.

![Password Information page](image)

7. A temporary password has been emailed to you.

**Note:** The temporary password expires in 24 hours.
Temporary Password Email

8. You with then return to the Log In page.

9. Type in your **User ID** and **Temporary Password**.

10. Click the **Log In** button.

11. The Reset Account page will display.

12. Type in a new password.

13. Confirm the new password by re-typing it.

14. Select five new challenge questions and provide answers for them.

15. Click the **Submit** button.

16. Click the **Continue** button.
A Password Changed confirmation page displays, verifying that your password has been changed.

Password Changed confirmation page

Log-In page

1. The Log In page redisplays and you will enter your new User ID and Password.

2. Click Log In.
The DDI application opens.

DDI Version 4.6.1
Using DocumentDirect for the Internet

Note: When selecting icons, buttons, etc. with the mouse, click one time only. It may take several seconds to receive a response. If you double-click or click again while waiting for a response, the browser screen may cover the message or window. If this occurs, you may have to minimize applications to locate the DDI message or window that you were trying to view.

Accessing Reports

To access reports through DDI:

1. Click the document server icon next to Reports.

![Report Document Server List]
The report folder will expand and display report options. The displayed list may not be representable of all reports.
**Setting Viewing Preferences**

You may customize your screen to view your reports or hide the document tree at the left side of the screen.

To set your viewing preferences:

1. Click the **Preferences** button in the icon bar above the document server names.

   **Note:** Use the left and right arrows to move the icon bar to view all the buttons from left to right or vice versa.

   The *Preferences* window displays.

   ![Preferences window](image)

   Preferences window

2. Select the **Display document servers in the Explorer tree** preference option to hide the document tree. This option is used most when Personal folders have been created.

3. Select the **Display personal folders in the Explorer tree** preference option to hide Personal Folder that have been created.

4. You may also designate the directory for your where your personal folders will be stored in the *Location* field.

5. When you have finished making your changes, click the **OK** button to save your preferences and return to the main DDI screen.
Locating and Opening a Report

You can locate and open a report using the Locate window or the document tree screen.

Using the Locate Window

To locate a specific report, a report version, a section, or page of a report version:

1. Click the Locate button in the icon bar above the document server names. The Locate window displays.

2. Type the information for which you are searching (i.e., Report ID, Version ID, Section ID, and/or Page).

3. Click the Locate button. The value in the Document server drop-down list will default to the document server you selected when signing onto DDI. The document server list will scroll to the report ID, version ID, section ID, or page typed in the Locate window fields.

   Note: Only the report ID is required. The version ID, section ID, and page are optional.

   Note: If you use the Locate button to locate a report ID and it does not exist in the system, DDI will scroll to the next available report ID.
4. To open the report automatically when the search is complete, click the **Open** button.

   **Note:** Two other icon tools are available in the *Locate* window:

   - Click the **Cancel** button to close the *Locate* window and return to the main screen.
   - Click the **Help** button to access further information about the *Locate* window. The Help topic opens in a separate window.

### Opening a Report

To open and view a report-

1. Click the **Report** button to display the available reports.

   ![List of Available Reports]

   The available reports are listed in ascending report ID order.

   **Note:** Only a certain number of reports, versions, or sections are visible at one time. Use the icon to display additional reports.

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. 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 Report Version button next to the report version you want to view.

A list of report sections you are able to view displays.

4. Click the icon next to the report section you want to view.
The report displays in a new window.

### Report Sample

<table>
<thead>
<tr>
<th>ACCT</th>
<th>DESCRIPTION</th>
<th>planked</th>
<th>ACTUAL</th>
<th>VARIANCE</th>
<th>PLANNED</th>
<th>ACTUAL</th>
<th>VARIANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>920001</td>
<td>DATA PROCESSING</td>
<td>1,710</td>
<td>3,040</td>
<td>1,330</td>
<td>16,503</td>
<td>19,081</td>
<td>13,779</td>
</tr>
<tr>
<td>930001</td>
<td>ELECTRICITY</td>
<td>2,024</td>
<td>1,607</td>
<td>1,594</td>
<td>10,202</td>
<td>15,249</td>
<td>15,096</td>
</tr>
<tr>
<td>935000</td>
<td>EMPLOYEE BENEFITS</td>
<td>2,035</td>
<td>5,231</td>
<td>3,297</td>
<td>28,325</td>
<td>51,231</td>
<td>22,966</td>
</tr>
<tr>
<td>940001</td>
<td>EQUIPMENT RENTALS</td>
<td>797</td>
<td>1,421</td>
<td>614</td>
<td>7,097</td>
<td>13,937</td>
<td>6,841</td>
</tr>
<tr>
<td>960001</td>
<td>OFFICE SUPPLIES</td>
<td>99</td>
<td>177</td>
<td>78</td>
<td>959</td>
<td>1,737</td>
<td>798</td>
</tr>
<tr>
<td>965001</td>
<td>POSTAGE, FREIGHT, ETC.</td>
<td>1,506</td>
<td>2,686</td>
<td>1,170</td>
<td>14,537</td>
<td>26,323</td>
<td>11,786</td>
</tr>
<tr>
<td>990001</td>
<td>REPRODUCTION</td>
<td>201</td>
<td>358</td>
<td>157</td>
<td>1,928</td>
<td>3,509</td>
<td>1,571</td>
</tr>
<tr>
<td>995001</td>
<td>SALARIES &amp; WAGES</td>
<td>3,350</td>
<td>5,985</td>
<td>2,638</td>
<td>22,408</td>
<td>50,684</td>
<td>26,276</td>
</tr>
<tr>
<td>995001</td>
<td>SUBCONTRACTORS</td>
<td>1,045</td>
<td>1,055</td>
<td>516</td>
<td>10,083</td>
<td>16,239</td>
<td>6,176</td>
</tr>
<tr>
<td>995001</td>
<td>TELEPHONE &amp; TELEGRAPH</td>
<td>996</td>
<td>1,775</td>
<td>779</td>
<td>9,610</td>
<td>17,403</td>
<td>7,792</td>
</tr>
<tr>
<td>995001</td>
<td>RAW MATERIALS</td>
<td>3,313</td>
<td>5,903</td>
<td>2,592</td>
<td>31,064</td>
<td>57,880</td>
<td>26,816</td>
</tr>
<tr>
<td>995001</td>
<td>DEPRECIATION</td>
<td>1,247</td>
<td>5,353</td>
<td>976</td>
<td>12,093</td>
<td>21,792</td>
<td>9,705</td>
</tr>
<tr>
<td>995001</td>
<td>MACHINE TOOL CONSUMABLES</td>
<td>917</td>
<td>1,425</td>
<td>518</td>
<td>8,851</td>
<td>16,029</td>
<td>7,177</td>
</tr>
<tr>
<td>995001</td>
<td>RENT</td>
<td>1,055</td>
<td>1,881</td>
<td>826</td>
<td>16,188</td>
<td>18,398</td>
<td>8,210</td>
</tr>
</tbody>
</table>

**Office Total:**

|                  | 21,200   | 37,781  | 16,594  | 204,526 | 370,539 | 165,945 |

**Note:** A status bar is provided at the bottom of the report you are viewing to identify the current report, version, section, and page number.
Navigating Through a Report

The icons located at the top of a report can be used to help navigate through the report. The techniques for locating a report page, searching for text, and using a filter are explained in this section.

Locating a Report Page

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.

   ![Go To window]

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.

   ![View window]
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 either HTML or PDF 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.

**Searching for Text within a Report**

To search for specific text in 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, select the appropriate search options, and click the **Find** button.
The first occurrence of the search text will display on the report page with the specified text highlighted.

<table>
<thead>
<tr>
<th>ACCT CODE</th>
<th>DESCRIPTION</th>
<th>PLANNED</th>
<th>ACTUAL</th>
<th>VARIANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>010000</td>
<td>PROCESSING</td>
<td>1,710</td>
<td>0,048</td>
<td>1,662</td>
</tr>
<tr>
<td>030000</td>
<td>ELECTRICITY</td>
<td>2,014</td>
<td>1,504</td>
<td>510</td>
</tr>
<tr>
<td>050000</td>
<td>EMPLOYEE BENEFITS</td>
<td>2,935</td>
<td>2,231</td>
<td>704</td>
</tr>
<tr>
<td>040000</td>
<td>EQUIPMENT RENTALS</td>
<td>707</td>
<td>1,421</td>
<td>714</td>
</tr>
<tr>
<td>060000</td>
<td>OFFICE SUPPLIES</td>
<td>99</td>
<td>177</td>
<td>78</td>
</tr>
<tr>
<td>050000</td>
<td>POSTAGE, FREIGHT, ETC.</td>
<td>1,506</td>
<td>2,005</td>
<td>509</td>
</tr>
<tr>
<td>090000</td>
<td>REPRODUCTION</td>
<td>201</td>
<td>157</td>
<td>44</td>
</tr>
<tr>
<td>090000</td>
<td>SALARIES &amp; WAGES</td>
<td>3,358</td>
<td>3,086</td>
<td>272</td>
</tr>
<tr>
<td>060000</td>
<td>SUBCONTRACTORS</td>
<td>1,045</td>
<td>1,042</td>
<td>3</td>
</tr>
<tr>
<td>035000</td>
<td>TELEPHONE &amp; TELEGRAPH</td>
<td>996</td>
<td>1,725</td>
<td>729</td>
</tr>
<tr>
<td>035000</td>
<td>RAW MATERIALS</td>
<td>3,112</td>
<td>2,592</td>
<td>520</td>
</tr>
<tr>
<td>040000</td>
<td>DEPRECIATION</td>
<td>1,247</td>
<td>2,223</td>
<td>976</td>
</tr>
<tr>
<td>070000</td>
<td>MACHINE TOOL CONSUMABLES</td>
<td>377</td>
<td>1,636</td>
<td>1,259</td>
</tr>
<tr>
<td>060000</td>
<td>RENT</td>
<td>1,555</td>
<td>1,901</td>
<td>346</td>
</tr>
</tbody>
</table>

**Office Total:**

|                      | 21,200 | 17,794 | 3,406 |

Highlighted Search Text

**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]).

3. 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.

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

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

6. Filtered data selected will display at the bottom of the screen. You can print, export, delete selected items, select columns, and edit filter criteria.
Printing Reports

DDI allows you to print the reports that you currently have open, as well as unopened 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.

Printing Open Reports

To print an open report to your local printer:

1. Click the Print Pages button to print with the ability to make print adjustments and modifications or click the Quick Print button to use the default print settings.
   If you click the Print Pages button, the Print window displays.
   Note: If you click the Quick Print option, the default page orientation is Portrait and cannot be changed.
2. Select the appropriate print range and document print options.

3. Click the Print button in the Print window, 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. **Only Microsoft Internet Explorer browser users have the option to de-select the Include presentation elements option.**

**Printing Unopened Reports**

To print reports without first opening them:

1. Select the reports you wish to print in the document tree.

    **Note:** You can select multiple reports by holding down the **Ctrl** key. Select a range of reports by holding down the **Shift** key.
2. **Right-click** on a selected report.

A pop-up menu displays.

3. Click **Print** from the menu.

   **Note:** You can also perform this function by selecting the **Print Selected Documents** button in the icon bar above the document tree.

The **Print Selected Documents** window displays.
4. Select your document print options and click the Print button in the window. The report is sent to your local printer.
Personal Folders

The Folders feature helps you organize your DDI reports and provides quick access to their contents.

Note: You can only create folders within the Enterprise View document tree.

Creating and Managing Personal Folders

To create a new personal folder:

1. Highlight the Enterprise View document tree name.

   ![Document Tree](image)

   Document Tree

2. Click the New Personal Folder button from the icon bar, or right-click your mouse and click New from the pop-up menu.

   ![Pop-up menu](image)

   Pop-up menu

   A new folder is created in the document tree.

3. To name the folder, click on the folder’s label and type the new name. Press Enter.

   ![New Folder Name](image)

   New Folder Name
**Note:** You may also designate the directory for your personal folders by selecting the **Preference** button at the top of the document tree window. It is recommended that you change the directory to one that is backed up by your institution. Folders are saved as .mef files.

## Copying Reports into Personal Folders

To copy a report into a personal folder:

1. Select the report you wish to copy.
   
   **Note:** You can select multiple reports by holding down the **Ctrl** key. To select a range of reports, hold down the **Shift** key.

![](image)

Selected Reports

2. Click the **Copy to Personal Folder** button in the icon bar above the document tree.

   The **Copy to Folder** window displays.

![](image)

Copy to Folder window

3. Click the folder where you want the report copied.

4. Click the **OK** button.

Your report will be copied into the selected folder.
Report is copied

**Note:** Microsoft Explorer users can move a report between a document server and personal folders using the drag and drop feature.

### Moving Reports between Personal Folders

To move a report between personal folders:

1. Select the report you wish to move.

   ![Selected Reports](image)

   **Selected Reports**

   **Note:** You can select multiple reports by holding down the Ctrl key. To select a range of reports, hold down the Shift key.

2. Click the **Move to Personal Folder** button in the icon bar above the document tree.

   The *Move to Folder* window displays.

   ![Move to Folder window](image)

   **Move to Folder window**

3. Click the folder where you want the report moved.

   "AC001 is a shipped sample"
4. Click the **OK** button.

The report displays in its new location.

Report is moved

**Note:** Microsoft Explorer users can move a report between personal folders using the drag and drop feature.

### Selecting the Number of Report Versions to Store in a Personal Folder

You can set the number of report versions to store in your personal folder.

To set the number of versions to store for a report:

1. Right-click on the report name.

**Note:** It is suggested that you add the name of the document server where the report was copied from to the report name. This will help identify where the report originated.

**Note:** The default location that the reports (saved as .mef files) and your personal folders will be stored in is C:\Documents and Settings. We recommend that you change this path to a network drive that is backed up automatically in your company.

2. Click on **Properties**.
3. Select the desired version option for the report.

![Version Options]

Version options include:

- **All** – Displays all versions of the report that are available.
- **Most Recent** – Displays the most recent version of the report.
- **Today** – Only used for daily reports.
- **Last Week** – Displays the past week’s versions for daily or weekly reports.
- **Last Month** – Displays the last month’s versions for daily, weekly, or monthly reports.
- **Last Three/Six/Twelve Months** – Displays the last three, six, or twelve months of daily, weekly, monthly, or quarterly reports.

4. Once you have selected the version option, press *Enter* or click the **OK** button.
The version option you selected displays.

![Report Version]

In the example above, the most recent version option was selected for the report. When the report runs again, the new version will replace the existing version in the folder.

**Note:** You will need to click the **Refresh** icon in the tool bar to see any version selection changes without logging out of DDI.

**Downloading Reports**

As with the print option, DDI allows you to download reports that you currently have open, as well as unopened reports.

**Downloading Open Reports**

To download an open report to your computer:

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

   The Download window displays.
2. Select the appropriate options and click the Create button to download the report.

   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.

   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.

   A file download window displays that allows you to download the report to the location set in your Preferences.

   Reported can also 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.

      The Download window displays.
2. In the **Pages** option select **Current Selection**.

3. Select the **Selected data using policy** option.

4. Uncheck **Compress into ZIP archive format**.

5. Click the **Create** button to download the report.

The report will be automatically downloaded in CSV format and can be opened in Excel.

**Downloading Unopened Reports**

To download reports without first opening them:

1. Select the report you wish to download in the document tree.

   **Note:** You can select multiple reports by holding down the **Ctrl** key. Select a range of reports by holding down the **Shift** key.
2. Right-click the selected report(s).

A pop-up menu displays.

3. Click **Download** from the pop-up menu.

   **Note:** You can also perform this function by choosing the **Download** button from the document tree.

   The **Download Options** window displays.
4. Select your document download options and click the **Download** button.

**Note:** It is recommended that you select Text or PDF as your formats, because HTML will download each page of the report as a separate document.
Note: Combine like formats into a single file option allows you to combine all the PDF and Text items appearing in the download list into a single file, rather than as individual files.

The Download Status window displays. It indicates the status of the report being downloaded.

5. When the Download Complete notification displays at the bottom of the Download Status window, click the OK button to close the window.

The report is downloaded to the directory you specified.

Note: If you do not specify a directory, the report will be downloaded and saved on your desktop in a folder titled ‘user.home’.

Importing a Report into Excel

To import a downloaded report into Microsoft Excel:

1. Open Excel.

2. Open the saved report file.
The **Text Import Wizard Step 1** screen displays.

3. Click the **Delimited** option and click **Next**.

    The **Text Import Wizard Step 2** screen displays.
4. Click Delimiters of Tab and Comma and click Next.
The *Text Import Wizard Step 3* screen displays.

5. Click **General** column data format and click **Finish**.

The report will open in Excel and you can adjust the report as needed.
Log Off

To log off of DDI click on the Log Off icon above the document names on the Enterprise View.
Appendix

Icon Definitions (Enterprise View)

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>Locate</td>
<td>Opens the Locate window.</td>
</tr>
<tr>
<td>![Quick Open Selected Document]</td>
<td>Quick Open Selected Document</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>Refresh Enterprise Explorer</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>Print Selected Document</td>
<td>Prints selected reports without opening them. Document options are available.</td>
</tr>
<tr>
<td>![Download]</td>
<td>Download</td>
<td>Downloads selected reports without opening them. Format and directory options are available.</td>
</tr>
<tr>
<td>![New Personal Folder]</td>
<td>New Personal Folder</td>
<td>Creates a new folder for personal report storage.</td>
</tr>
<tr>
<td>![Delete]</td>
<td>Delete</td>
<td>Deletes selected folders.</td>
</tr>
<tr>
<td>![Copy to Personal Folder]</td>
<td>Copy to Personal Folder</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>Move to Personal Folder</td>
<td>Copies the currently selected report into another folder.</td>
</tr>
<tr>
<td>![Preferences]</td>
<td>Preferences</td>
<td>Opens the Preferences window displaying viewing and folder preference options.</td>
</tr>
<tr>
<td>![Help]</td>
<td>Help</td>
<td>Opens the DDI Help window.</td>
</tr>
<tr>
<td>![Log Off]</td>
<td>Log Off</td>
<td>Logs the user off of DDI and returns them to the Access System Reports page.</td>
</tr>
</tbody>
</table>
# Report Icons

<table>
<thead>
<tr>
<th>Graphic</th>
<th>Icon Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Previous Document" /></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><img src="image" alt="Next Document" /></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><img src="image" alt="Previous Page" /></td>
<td>Previous Page</td>
<td>Goes to the previous page of an open report.</td>
</tr>
<tr>
<td><img src="image" alt="Next Page" /></td>
<td>Next Page</td>
<td>Goes to the next page of an open report.</td>
</tr>
<tr>
<td><img src="image" alt="Go To" /></td>
<td>Go To</td>
<td>Opens the <em>Go To</em> window that allows you to jump to a specific page.</td>
</tr>
<tr>
<td><img src="image" alt="Find" /></td>
<td>Find</td>
<td>Finds specific text within an open report.</td>
</tr>
<tr>
<td><img src="image" alt="Find Next" /></td>
<td>Find Next</td>
<td>Finds the next occurrence of a specific text search.</td>
</tr>
<tr>
<td><img src="image" alt="Filter By Line" /></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><img src="image" alt="Download Pages" /></td>
<td>Download Pages</td>
<td>Downloads an open report. Format and directory options are available.</td>
</tr>
<tr>
<td><img src="image" alt="Print Pages" /></td>
<td>Print Pages</td>
<td>Prints an open report. Size and quantity options are available.</td>
</tr>
<tr>
<td><img src="image" alt="Quick Print" /></td>
<td>Quick Print</td>
<td>Prints an open report without the ability to make option modifications.</td>
</tr>
<tr>
<td><img src="image" alt="View" /></td>
<td>View</td>
<td>Provides document resizing and folder location options.</td>
</tr>
<tr>
<td><img src="image" alt="Format" /></td>
<td>Format</td>
<td>Provides option to select HTML or PDF format.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Opens the <em>Help</em> window.</td>
</tr>
<tr>
<td><img src="image" alt="Close Document" /></td>
<td>Close Document</td>
<td>Closes current report.</td>
</tr>
</tbody>
</table>