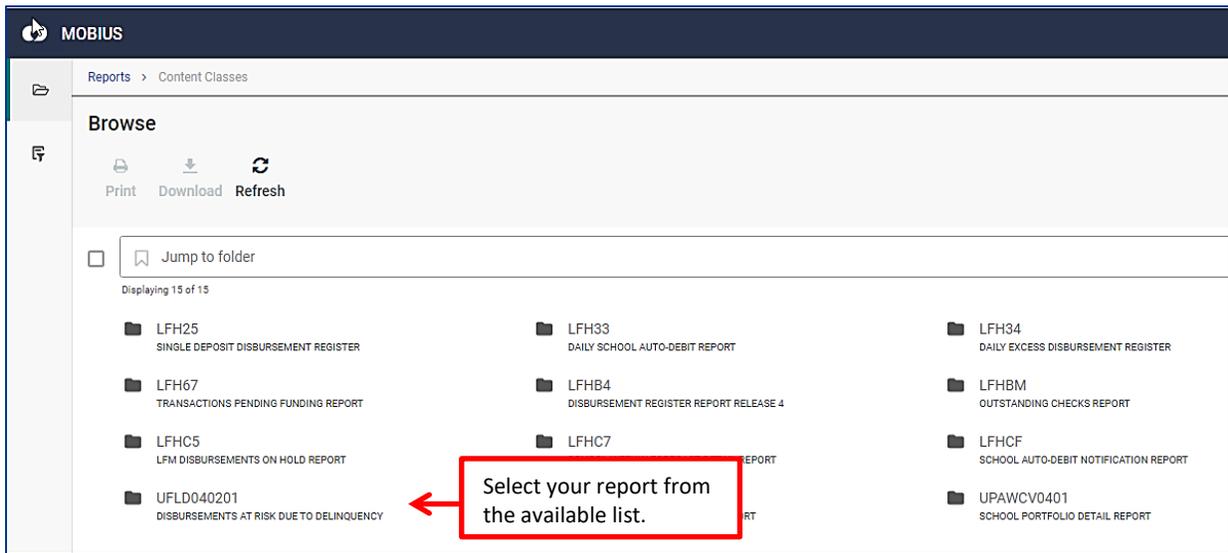


Downloading Reports - Excel Format

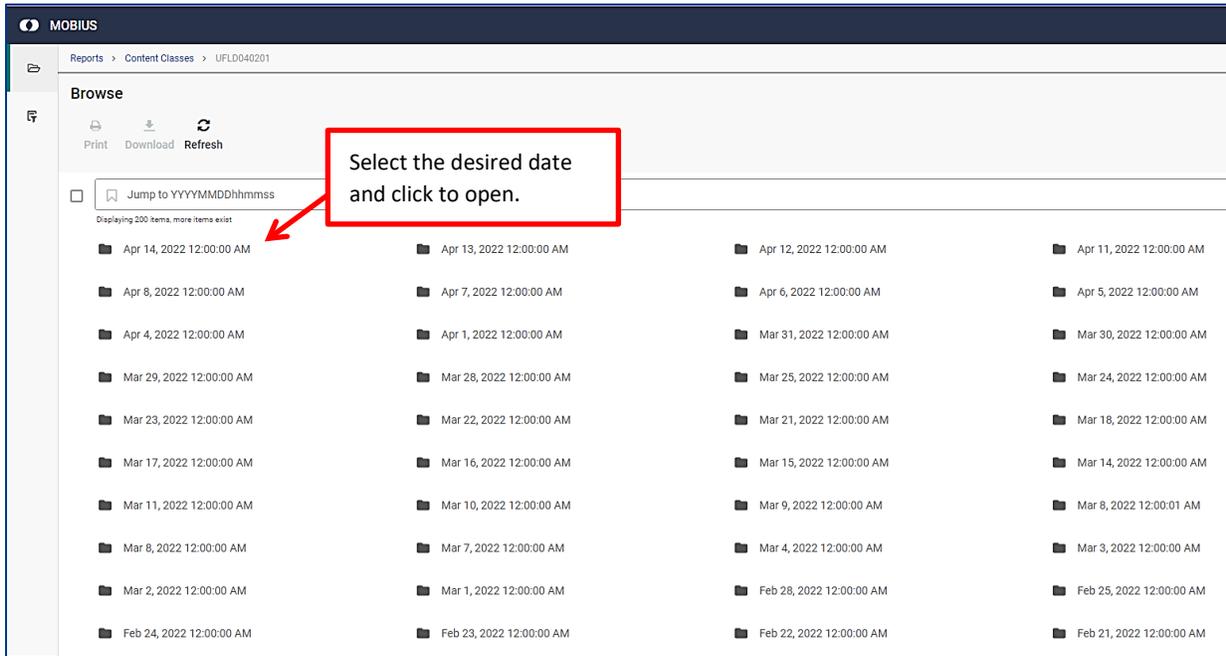
How to download reports into Excel format:

1. The list of available reports will be displayed. Select the report your wish to view and download.

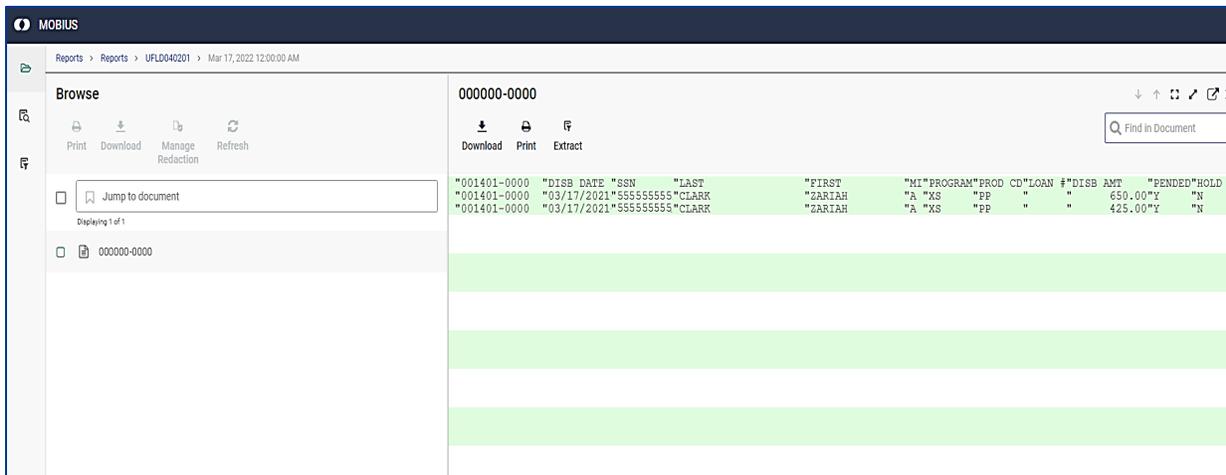


(Continued on the next page)

2. Open the report folder by selecting the date.

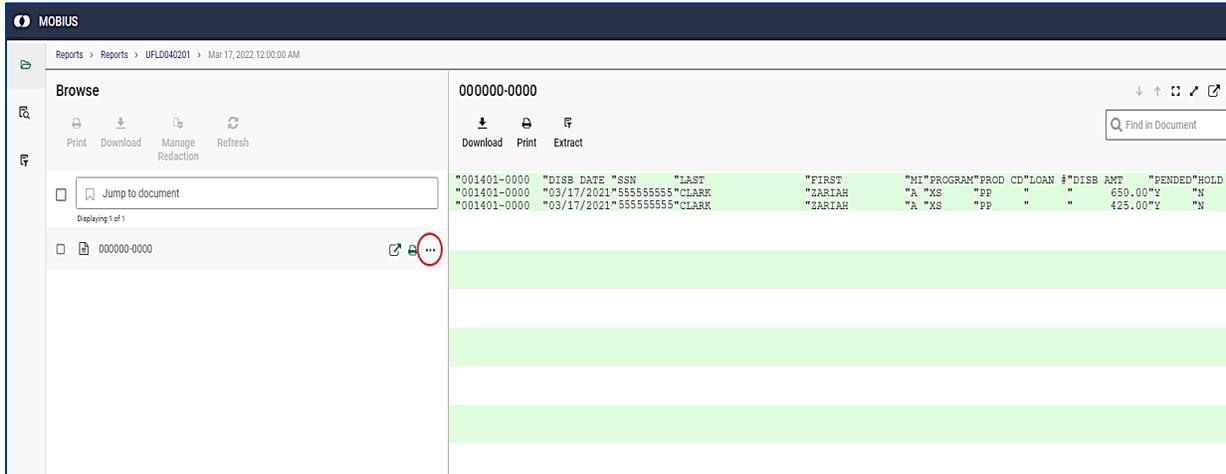


3. The contents of the report will display in the right pane for viewing. The folder will be empty if there is no data to populate the report on that given day.

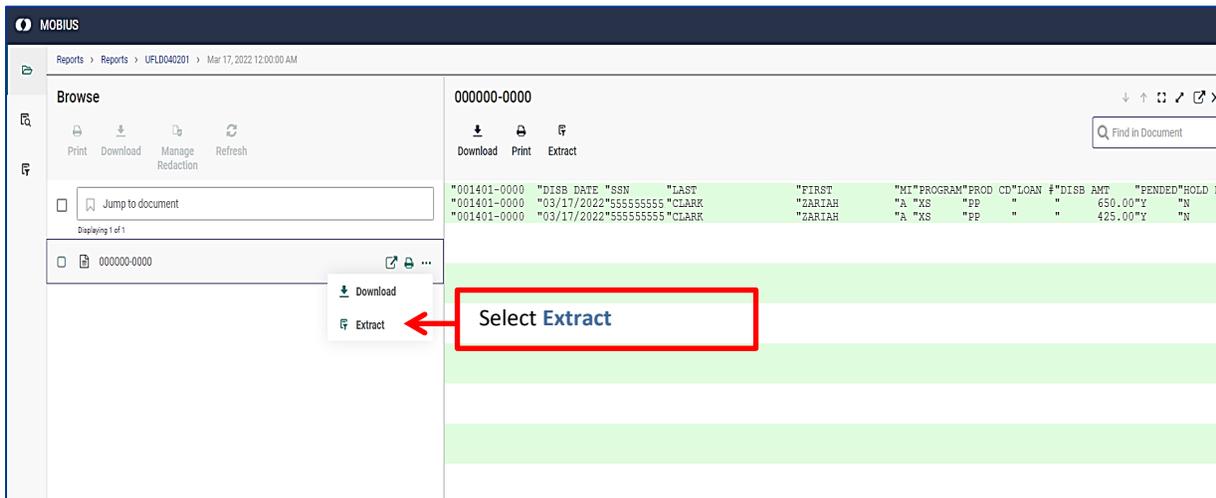


(Continued on the next page)

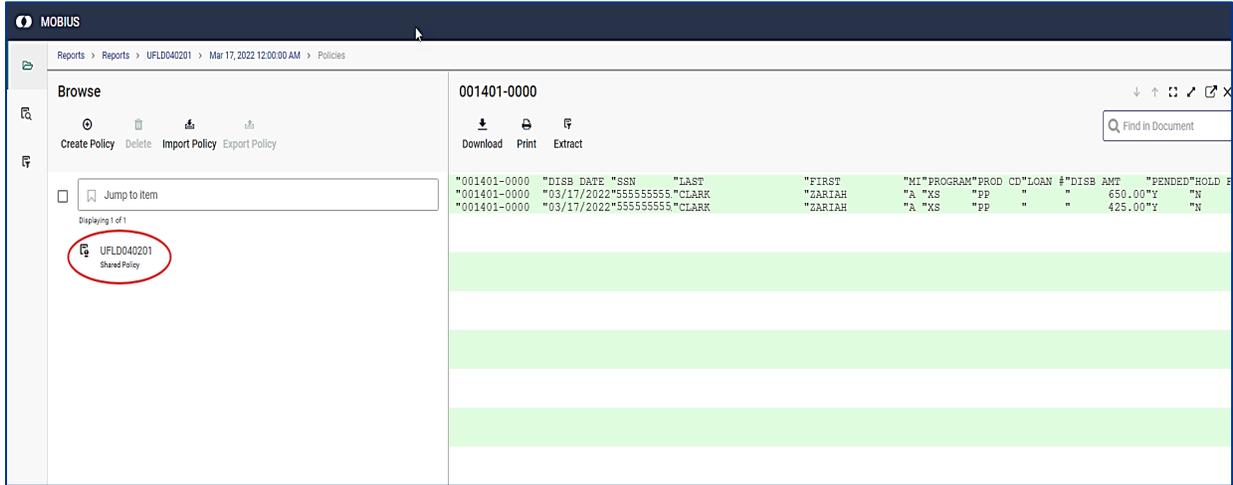
4. To **download** the report, hover your cursor over the school code in left display panel then select the **ellipsis ...**



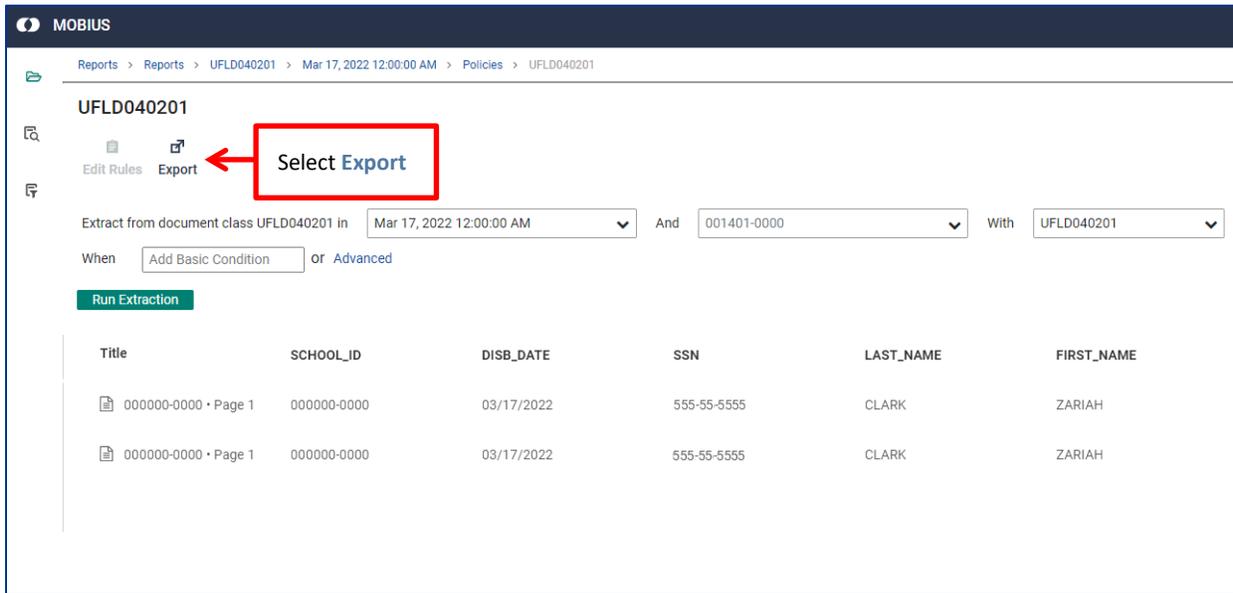
5. Select **Extract**. This will open to display the extract Policy.



(Continued on the next page)

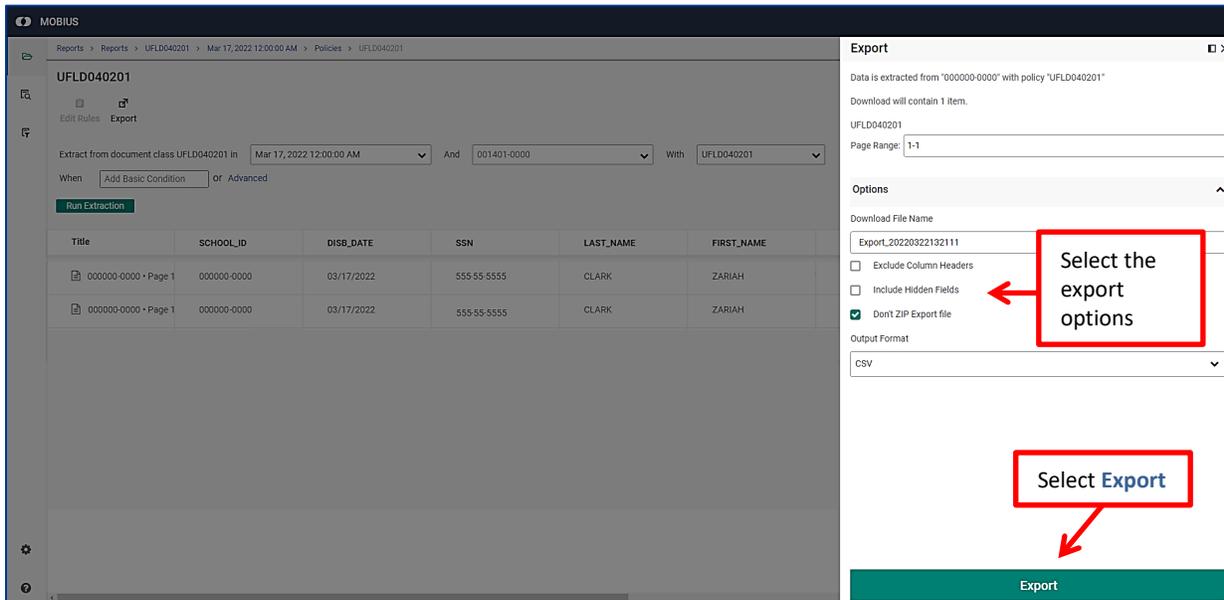


6. Select the **Shared Policy**.

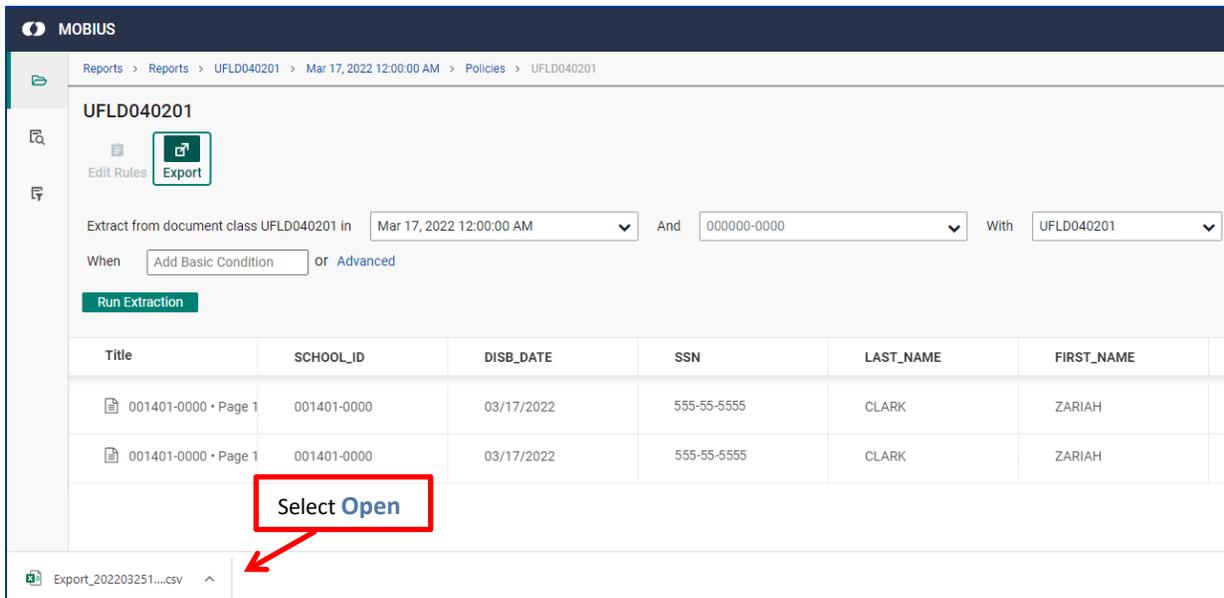


7. Report detail displays. Select **Export** to save the report into Excel.

(Continued on the next page)



- An Export window displays. Unselect the check the box for **Exclude Column Headers** and select the check box for **Don't Zip Export File**. Select **Export**.



Select **Open** to automatically open the report in Excel.

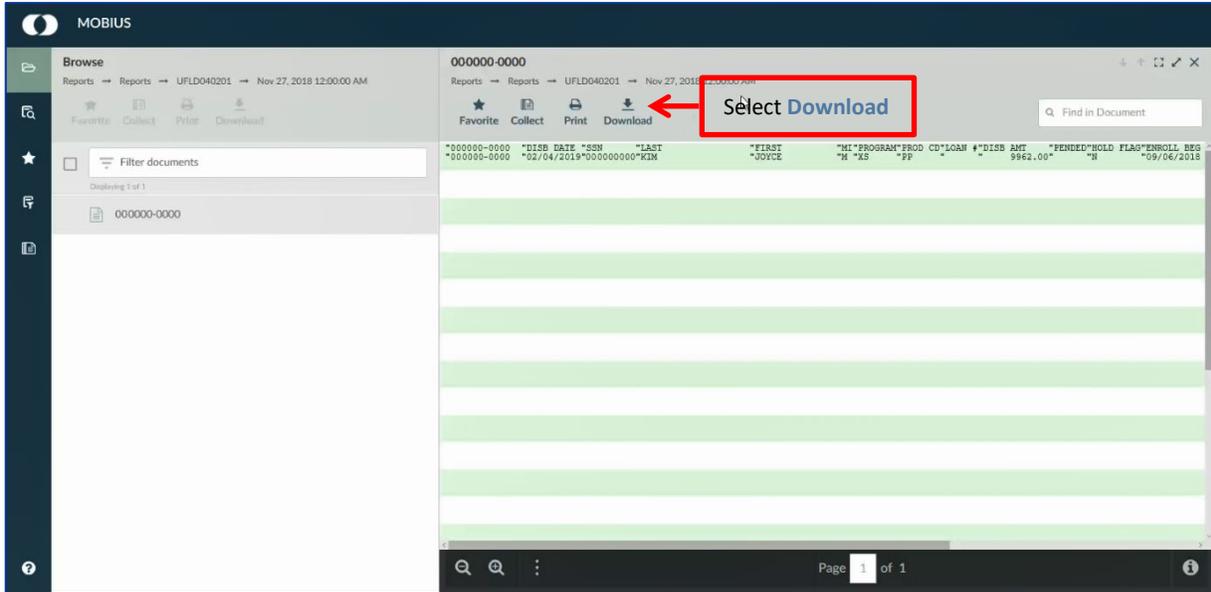
| | SCHOOL_ID | DISB_DATE | SSN | LAST_NAME | FIRST_NAME | MI | PROG_CODE | PROG_CODE | LOAN_NUM | DISB_AMT | PENDED | HOLD_FLAG | ENROLL_BEGIN_DT | ENROLL_END_DT | DAYS_DLQT | TTL_DLQT_AMT | FORB | FORB_END_DATE |
|---|-------------|-----------|--------------|-----------|------------|----|-----------|-----------|----------|----------|--------|-----------|-----------------|---------------|-----------|--------------|------|---------------|
| 2 | 000000-0000 | 3/17/2022 | 555-555-5555 | CLARK | ZARIAH | A | XS | PP | | 650 | Y | N | 7/15/2020 | 6/15/2021 | 68 | 75 | | |
| 3 | 000000-0000 | 3/17/2022 | 555-555-5556 | CLARK | ZARIAH | A | XS | PP | | 425 | Y | N | 7/15/2020 | 6/15/2021 | 68 | 75 | | |

- Once the report results display in Excel you can **save** or **print** the information.

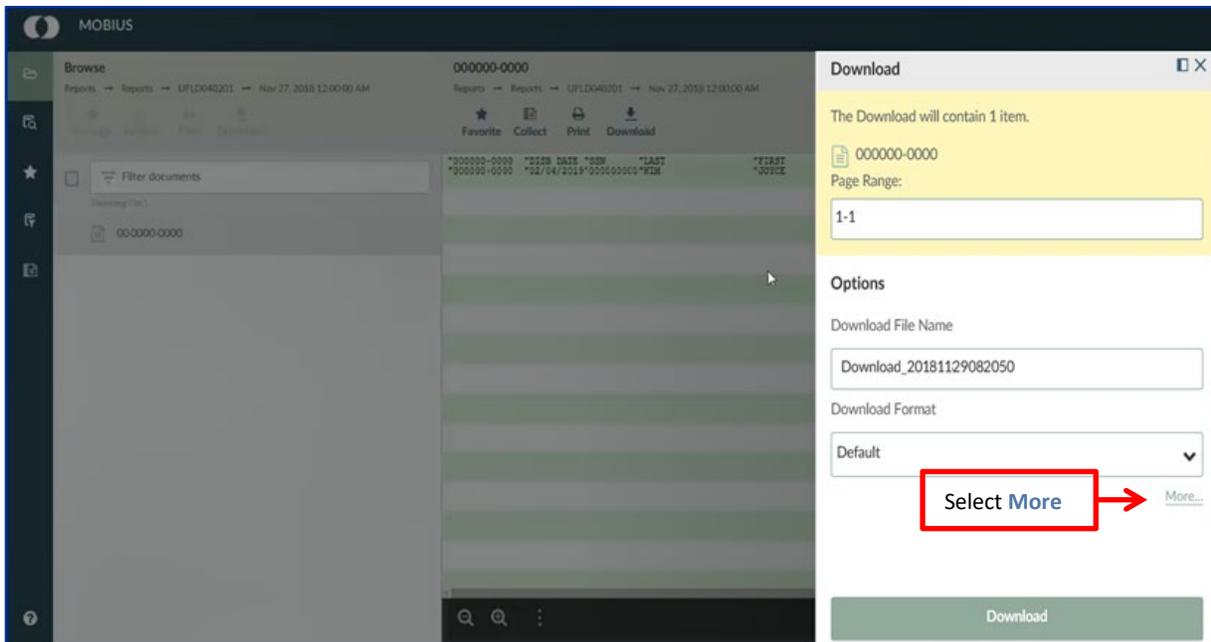
Downloading Reports - Text and PDF formats

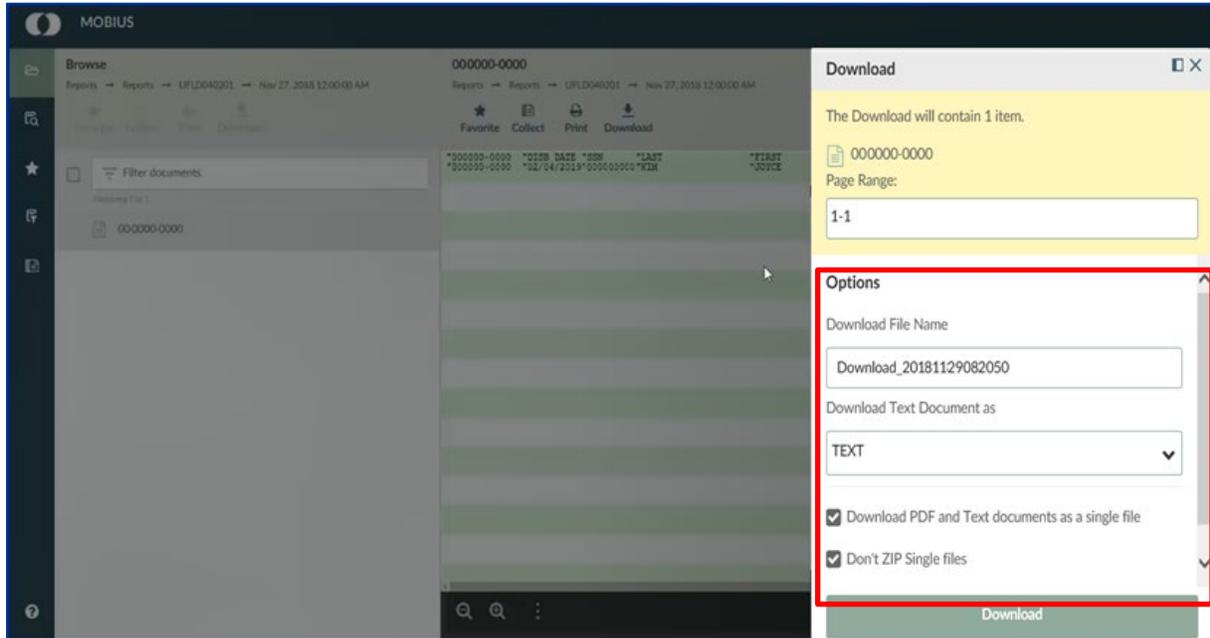
How to download reports into Text and PDF formats:

1. Once you have the report opened, select the **Download** from the menu bar.

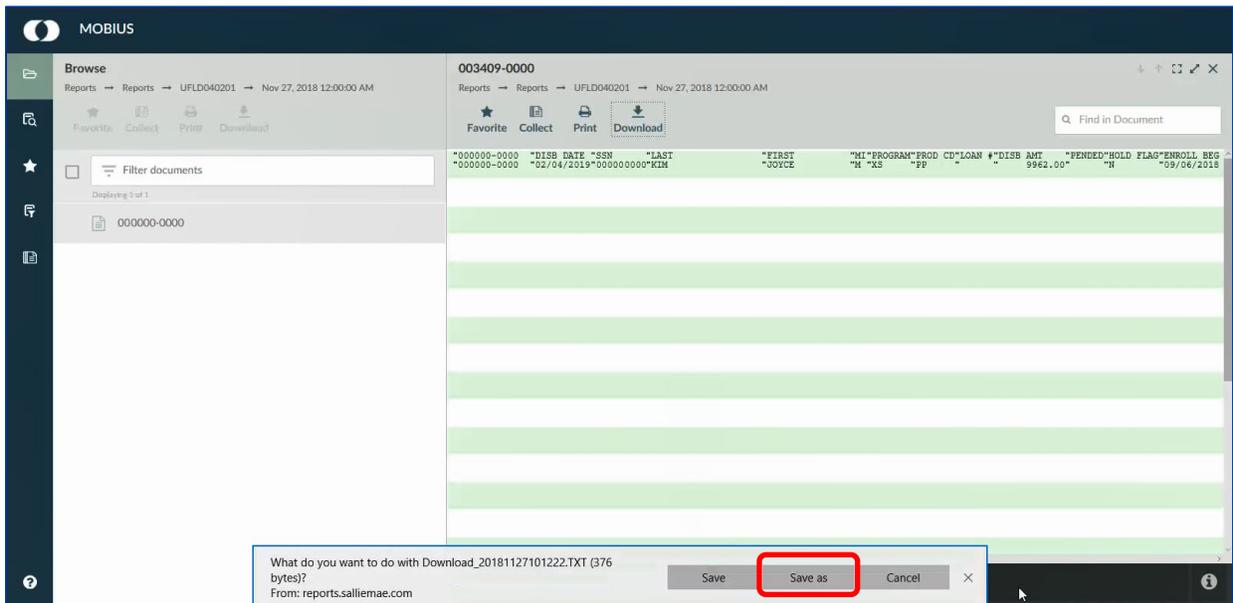


2. The Download menu displays. Select **More** for additional options

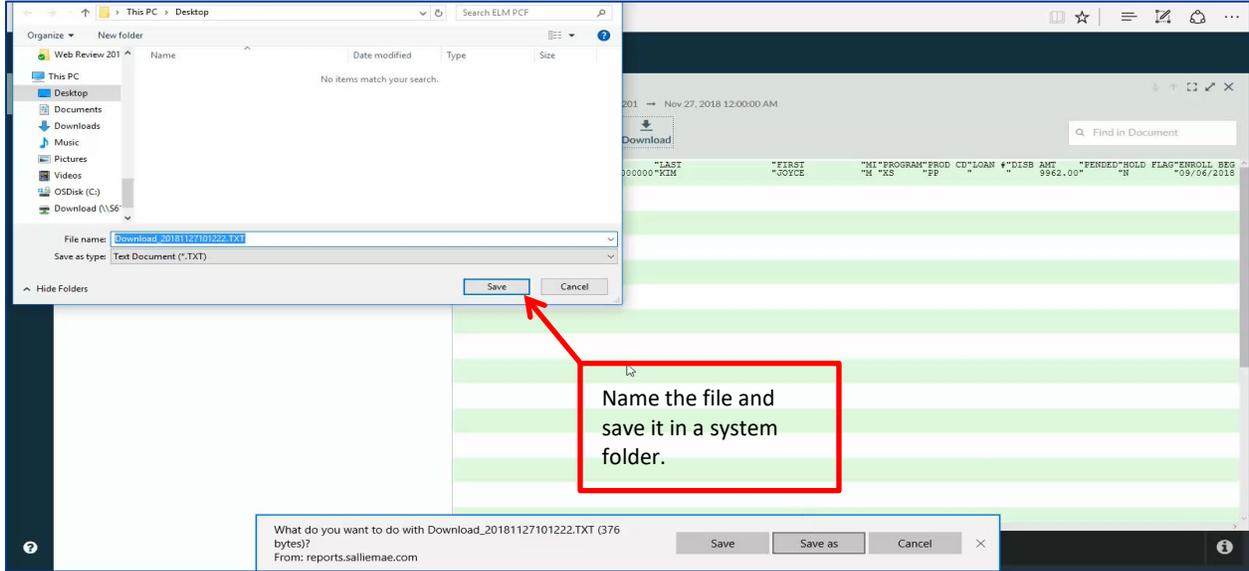




3. Select the document type (Text or PDF) in the **Download Text Document as** dropdown box.
4. Select the check boxes for **Download PDF and Text Documents in one file** and **Don't Zip Single Files**.
5. Select the **Download** button.



6. Select **Save** or **Save As** from the download dialog box.



7. Name the file and **Save** it into a designated system folder.