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About DocumentDirect® for the Internet

DocumentDirect for the Internet (DDI) is a service offered by Navient® that allows you to view reports online via the World Wide Web. It interfaces with ViewDirect® to make it easier to view reports. If you already use ViewDirect and have an ID and password, you are ready to proceed. 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, Guarantors, Collection Agencies, and Servicers. DDI access and use information for all of these customer types is contained in this document.
Accessing DocumentDirect for the Internet

DDI can be accessed in two different ways:

- Through the Navient Home Page [www.navient.com](http://www.navient.com)
- Through the School Servicing Portal [https://ssp.navient.com](https://ssp.navient.com)

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ASG-DocumentDirect for the Internet 4.5.3 Support Matrix

Updated: January 25, 2015

**NOTE:** DocumentDirect for the Internet 4.5.3 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>Microsoft Windows 7</td>
<td>Microsoft Internet Explorer 9</td>
<td>Java 6 update 31</td>
</tr>
<tr>
<td>Microsoft Windows 8</td>
<td>Microsoft Internet Explorer 10</td>
<td>Java 7 update 75/76</td>
</tr>
<tr>
<td>Microsoft Windows 2012</td>
<td>Microsoft Internet Explorer 11</td>
<td>Java 6 update 45</td>
</tr>
<tr>
<td>Microsoft Windows 8.1</td>
<td>Google Chrome 3.1</td>
<td></td>
</tr>
<tr>
<td>Microsoft Windows 2012</td>
<td>Mozilla Firefox 4.1</td>
<td></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 36, and Mozilla Firefox version 29.
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. Microsoft Internet Explorer 9 is not supported on Windows 8.1 and Windows 2012 R2.
6. Microsoft 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, hot highlighting is not enabled.
9. Oracle updates Java on a quarterly basis (sometimes more frequently). When the next version of Java is released, or four 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. Java 6 is not supported by Oracle and ASG recommends that our customers do not use it. However, as a courtesy to customers that are unable to migrate, ASG will attempt to maintain compatibility with the last public release of Java 6. Our recommendation is to migrate as soon as feasible.
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.

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)

Java File Download window

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.
**Through the Navient.com Website**

To access DDI from the Navient.com website:

1. Open your Web browser and navigate to [https://www.navient.com/techdocs/ddi/](https://www.navient.com/techdocs/ddi/).

   The DDI Access page displays.

2. Click **Launch DDI**.

   The DDI Application opens and the Log In page displays.
Log In page

WARNING - This system may contain U.S. Government information, which is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this system or of the data contained herein or in transit to/from this system is prohibited and constitutes a violation of Title 18, United States Code, Section 1030, and may subject the individual to criminal and civil penalties. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis/auditing of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. ANYONE USING THIS SYSTEM EXPRESSLY CONSENTS TO SUCH MONITORING AND RECORDING.

Monitoring and Recording Warning message
Through School Servicing Portal

To access DDI though the School Servicing Portal:


   The School Servicing Portal by Navient entry page displays.

2. Click the DocumentDirect link in the appropriate user type section.
The DDI Access page displays.

![DDI Access page](image)

**DDI Access page**

Note: You can save the DDI Access page as a bookmark or favorite in your Web browser.

1. Click the **Launch DDI** link to access DDI.

Note: Depending on your browser configuration, a security information message may be displayed. If this message is displayed, click the **Yes** or **Always** button to continue.
The DDI Application opens and the Log In page displays.

![DDI Log In Page](image)

**Log-In page**

**Monitoring and Recording Warning message**

**WARNING** - This system may contain U.S. Government information, which is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this system or of the data contained herein or in transit to/from this system is prohibited and constitutes a violation of Title 18, United States Code, Section 1030, and may subject the individual to criminal and civil penalties. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis/auditing of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. ANYONE USING THIS SYSTEM EXPRESSLY CONSENTS TO SUCH MONITORING AND RECORDING.
**First Time Log-In**

The first time you log in to DDI 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.

Log-In page

1. Type your **User ID** and **Password** and click the **Log In** button.
The Web Site Terms of Use page displays.

2. Read the terms and click the **I Accept** button.

   The Reset Account page displays.
3. Type in a new password.

4. Re-type the new password to confirm it.

5. Provide a phone number at which you can be contacted in the **Telephone** field. In certain security situations, we will use your phone number to send you a temporary Access Code. You may choose to enter your personal cell phone or your office phone.
Reset Account page (2)

6. Click the drop-down arrows and select five challenge questions.

7. Type in the five answers to the challenge questions.

   **Note:** Be sure to remember the answers to the challenge questions as you will need them if you ever need to reset your password.

8. Click the **Submit** button.
The Account Reset page displays.

Account Reset Confirmation page

8. Click the **Continue** button.

If an email address is missing the following screen will display.
Verify Email Address page

9. Enter your email address.

10. Click the Next button.
The DDI application opens.
After Your First Log-In

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

Log-In page

1. Type in your **User ID** and **Password**.

2. Click the **Log In** button.

   The DDI application opens.
DDI Version 4.5
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.

2. Click the **Continue** button.

   The Forgot User ID page displays.
Forgot User ID page

2. To obtain your user ID, contact your designated Navient representative.

3. Click the Finish button.

The Log-In page re-displays.
Log-In page
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.

Forgot Password page

3. Type in your user ID and email address.

4. Click the Submit button.

The Answer Challenge Questions page displays.
5. Answer the challenge questions.

6. Click the **Submit** button.

   The Forgot Password Information page displays.
Forgot Password Information page

7. A temporary password has been emailed to you.

**Note:** The temporary password expires in 24 hours.
8. Return to the Log In page.
9. Type in your **UserID** and **Temporary Password**.

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

    The Reset Account page displays.
Reset Account page

11. Type in a new password.

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

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

14. Click the Submit button.
An Account Reset confirmation page displays, verifying that your password has been changed.

Account Reset confirmation page

15. Click the **Continue** button.
The DDI application opens.

DDI Version 4.5

Click the links in the Resource Library on the left-hand navigation pane to access DDI Documentation and/or School/Lender Report Documentation. A new screen will display with the DDI Documentation and/or School/Lender Report Documentation web site displayed.

If you have any questions or concerns:

- Schools should contact Electronic Services at 1-800-348-4606.
- Lenders should contact Electronic Services at 1-800-348-4606.
- Guarantors should contact their Guarantor representative.
- Collection Agencies should contact their Collection Agency representative.
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 the report document server that contains the reports you want to view.

![Report Document Server List]
The report document server you selected will expand and display Report options.

Report options

**Note:** Your ViewDirect/DDI access determines which report document server(s) you have access to view. If you attempt to access a document server for which you do not have access, you will receive an error message stating the recipient ID does not exist.

- The Report option allows you to view the list of reports by report ID.

**Document Server Information**

- **Direct Reports:** contains information for Collection Agencies.
- **ED Reports:** contains information for The Department of Education for schools.
- **Info Special Reports:** contains documents such as Remote Guarantee Printing (RGP) and other reports that require special forms.
- **Louisiana Reports**: contains FFELP loan report information for the Louisiana Office of Student Financial Assistance (LOSFA) guarantor.

- **Maine Reports**: contains FFELP loan report information for the Finance Authority of Maine (FAME) guarantor from 05/17/2004 forward.

- **Michigan Reports**: contains FFELP loan report information for the Michigan Guaranty Agency (MGA) guarantor.

- **NELA Reports**: document server contains FFELP loan report information for NELA (Northwest Education Loan Association), which acts as the designated guarantor for the states of Idaho and Washington.

- **Non Nexus Reports**: contains information for this guarantor.

- **Oklahoma Reports**: contains FFELP loan report information for the Oklahoma Guarantee Student Loan Program (OGSLP) guarantor.

- **Private Credit Reports**: contains information for Navient Private Credit and FDR.

- **Rhode Island Reports**: contains FFELP loan report information for the Rhode Island Higher Education Assistance Authority (RIHEAA) guarantor.

- **Servicing Reports**: contains information for loans serviced on CLASS, Navient’s loan servicing system.

- **Test Reports**: contains information for testing of reports and does not contain valid data.

- **US Reports**: contains FFELP loan report information for the USA Funds guarantor from 05/17/2004 forward; including some Navient FFELP loan reports for the full and non-full serviced guarantors.
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 ← and → 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)

2. Click 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. Click 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. In addition, you can recall and view archived reports.

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.

   ![Locate window](image)

   Locate window

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 from the Document Tree**

You may access a report from the document tree.

To open and view a report from the document tree:

1. Click the Report button to display the 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.

<table>
<thead>
<tr>
<th>Report Date Time Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DULSFFBW01</strong> FORB PRECESSED WITHOUT CORR MESSAGE REGARDING FORB FEE</td>
</tr>
<tr>
<td><strong>Jun 20, 2011 5:30:34 AM</strong> DISK Available</td>
</tr>
<tr>
<td><strong>Jun 13, 2011 5:30:35 AM</strong> DISK Available</td>
</tr>
<tr>
<td><strong>Jun 6, 2011 6:00:41 AM</strong> CART RecallRequired</td>
</tr>
<tr>
<td><strong>May 30, 2011 5:30:34 AM</strong> DISK Available</td>
</tr>
<tr>
<td><strong>May 23, 2011 5:30:34 AM</strong> CART RecallRequired</td>
</tr>
<tr>
<td><strong>May 16, 2011 5:30:43 AM</strong> CART RecallRequired</td>
</tr>
</tbody>
</table>

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

**Note:** If the icon is displayed instead of the icon, the report must be recalled. See the *Recalling a Report* section of this guide for further information.

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

<table>
<thead>
<tr>
<th>Sections Available</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EIVD799R01</strong> LENDER 0E799 REPORT</td>
</tr>
<tr>
<td><strong>Jul 27, 2014 6:30:31 AM</strong> CENT Available</td>
</tr>
<tr>
<td><strong>000000</strong></td>
</tr>
<tr>
<td><strong>888888</strong></td>
</tr>
<tr>
<td><strong>111111</strong></td>
</tr>
</tbody>
</table>

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

Report Sample

**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.
Recalling a Report

If the Recall icon is displayed instead of the Report Version icon, the report is archived and must be recalled before it will be available for online viewing.

To recall a report from archive:

1. Click the Recall icon next to the report you wish to recall.

   ![Report Recall](image)

   A message displays indicating that a recall has been issued.

   ![Recall Message](image)

   2. Click the OK button. This will prompt the report recall process to continue.

   **Note:** It may take several minutes or longer to recall a report. You can check the status of the recall by collapsing the report version list using the Collapse icon and then re-expanding the report version list using the Expand icon. You may also click on the report again to see if it has been recalled. However, if your Internet session times out during the recall, it may be necessary to refresh your browser or return later to view your recalled report version.
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]

   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]

   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.

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. Click 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.

   ![Selected Reports](image)

2. **Right-click** on a selected report.

   A pop-up menu displays.

   ![Pop-up menu](image)

3. Click **Print** from the menu.
Note: You can also perform this function by clicking 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 select **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 the folder’s label and type the new name. Press **Enter**.

![Enterprise View](image)

New Folder Name

**Note:** You may also designate the directory for your personal folders by clicking 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. Click 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.

![Selected Reports](image)
2. Click the **Copy to Personal Folder** button in the icon bar above the document tree.

The **Copy to Folder** window displays.

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

4. Click the **OK** button.

Your report will be copied into the selected folder.

![Copy to Folder window]

**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. Click the report you wish to move.

![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]

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

4. Click the **OK** button.
The report displays in its new location.

![Image of report in 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.

```
  Non-Delinquency Reports
  JSF31R036 TEST FOR EXTRA LARGE FILES (TO CENTERA)
  Sep 24, 2014 10:56:15 AM CENT Available
```

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.

**Hiding Document Servers**

Once you have completed building your personal folders, you can customize your DDI view by hiding other Document Servers from view.

To hide other document servers:

1. Click the Preferences icon.
2. Un-check the option to **Display document servers in the Explorer tree**.

![Preferences]

3. Click the **OK** button.

Now only the personal folders you created are viewed.

![View after Hiding Explorer Tree]

**Note:** To re-display the Document Servers in the Explorer tree, click on the **Preferences** icon and re-check the **Display document servers in the Explorer tree** option.

**Note:** To access reports within the folders you have created, expand the folder by clicking on the + sign.
**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.

   ![Download window](image)

   **Download window**

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.

### 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.

   ![Selected Reports]

2. Right-click the selected report(s).

   A pop-up menu displays.

   ![Pop-up menu]

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.

![Download Status window]

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 downloaded import a report into Microsoft Excel:

1. Open Excel.

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

![Text Import Wizard Step 1]

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

The **Text Import Wizard Step 2** screen displays.

![Text Import Wizard Step 2]
4. Select Delimiters of Tab and Comma and click Next.

The Text Import Wizard Step 3 screen displays.

5. Select General column data format and click Finish.

The report will open in Excel and you can adjust the report as needed.
Viewing Immediate Archived Reports in the Direct Reports Document Server

To view an Immediate Archived report (for use by Collection Agencies only):

1. Click the Direct Reports document server.

   ![Direct Reports document server](image)

   Direct Reports document server

   A list of available reports displays.

   ![Available Reports](image)

   Available Reports

2. Click the icon next to the report you want to view.

   A list of available versions of the report displays. The date and time the report was archived will display as the version date and timestamp.
Available Versions

3. Click the version you want to open.

Version Selected

The *File Download* window displays.

File Download window

4. Click **Open** to view the report immediately or click **Save** to save the report to your PC.

**Note:** If you click the **Save** button, the *Save As* window displays. Navigate to where you want the report saved and click the **Save** button.
After you have saved the report to your PC, the *Download Complete* window displays.

5. Click **Open** and the report will open in the application that was defined during the report setup; at this time, either Microsoft Word or Excel.
Using the Data Definition Table Function

The Data Definition Table Function enables users to extract data from a DDI report and export that data into an Excel spreadsheet.

To use the Data Definition Table Function:

1. Click the Data Definition Table icon on the toolbar at the top of the report window.

The report displays in black and white. This indicates that you are in data definition mode.
2. Using the right-click button on your mouse, drag a red highlight box around the data you want exported into Microsoft Excel.

<table>
<thead>
<tr>
<th>TRAN CODE</th>
<th>TRANSACTION NUMBER</th>
<th>NAME</th>
<th>S/N</th>
<th>GROSS PAYMENT</th>
<th>AGCY</th>
<th>REG</th>
<th>COL</th>
<th>DATE</th>
<th>LOC</th>
<th>FYMT</th>
<th>TYPE</th>
</tr>
</thead>
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<td>-</td>
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<td>1.88</td>
<td>77</td>
<td>06/16/11</td>
<td>WR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Data Selected for Export

3. Click the New Data Definition Table icon in the toolbar at the top of the report window.

The report is separated into red highlighted columns.

Report Separated into Red Columns
4. Manipulate the red columns as needed.

   **Note:** You may drag the lines to resize the columns, split the columns by clicking the icon, or merge the columns by clicking the icon. You may also change the column names by clicking the icon, and save the table settings by clicking the icon to use on the report the next time you want to export the data.

   **Note:** These tables will appear at the bottom of the document server tree list and are saved as .mef files in the location you have specified in Preferences.

5. Click the **View Data in Excel** icon in the toolbar at the top of the report window.

   The *View in Excel* window displays.

   ![View in Excel window]

   6. Select your exporting options and click the **OK** icon.
7. The Excel File Download window displays.

8. Click the **Save** button to save the data in an Excel spreadsheet.

   **Note:** Clicking the **Open** button will open the report in Excel. You can manipulate the data and then save the file.

   The **Save As** window displays.
9. Select where you want to save the Excel spreadsheet and click the **Save** button.

**Log Off**

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

![Enterprise View]

---

**Log Off Icon**
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 Icon]</td>
<td>Locate</td>
<td>Opens the <em>Locate</em> window.</td>
</tr>
<tr>
<td>![Quick Open Selected Document Icon]</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 Icon]</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 Icon]</td>
<td>Print Selected Document</td>
<td>Prints selected reports without opening them. Document options are available.</td>
</tr>
<tr>
<td>![Download Icon]</td>
<td>Download</td>
<td>Downloads selected reports without opening them. Format and directory options are available.</td>
</tr>
<tr>
<td>![New Personal Folder Icon]</td>
<td>New Personal Folder</td>
<td>Creates a new folder for personal report storage.</td>
</tr>
<tr>
<td>![Delete Icon]</td>
<td>Delete</td>
<td>Deletes selected folders.</td>
</tr>
<tr>
<td>![Copy to Personal Folder Icon]</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 Icon]</td>
<td>Move to Personal Folder</td>
<td>Copies the currently selected report into another folder.</td>
</tr>
<tr>
<td>![Preferences Icon]</td>
<td>Preferences</td>
<td>Opens the <em>Preferences</em> window displaying viewing and folder preference options.</td>
</tr>
<tr>
<td>![Help Icon]</td>
<td>Help</td>
<td>Opens the <em>DDI Help</em> window.</td>
</tr>
<tr>
<td>![Log Off Icon]</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 Go To 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="View/Hide Page Notes" /></td>
<td>View/Hide Page Notes</td>
<td>Add a page note to the document.</td>
</tr>
<tr>
<td><img src="image" alt="Edit Annotations" /></td>
<td>Edit Annotations</td>
<td>Create annotations or edit the annotations associated with this document.</td>
</tr>
<tr>
<td><img src="image" alt="Data Definition Table" /></td>
<td>Data Definition Table</td>
<td>Converts open report into table format for downloading.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Opens the Help window.</td>
</tr>
<tr>
<td><img src="image" alt="Close Document" /></td>
<td>Close Document</td>
<td>Closes current report.</td>
</tr>
</tbody>
</table>