

Desktop Reporting Download Instructions

(DU® Weekly Activity Report, DU Refi Plus™ Reports, DU Casefile Pipeline Report, and EarlyCheck™ Reports)

DU Weekly Activity Report

To open your zipped report, follow these steps:

1. First, determine the directory/folder in which you wish to store your report(s). (You may wish to create a new folder on your personal computer for your Desktop Reporting files.)
2. Separately, on the Desktop Reporting Report List page, click on the "Formatted" link.
3. When the **File Download** pop-up window appears, click on the "Open" button.
4. After the file opens, a WinZip screen appears.
5. Click on the "Extract" icon.

NOTE: If WinZip does not appear, you may need to install WinZip on your computer. You can do this at www.winzip.com. It should only take a couple of minutes.
6. In the "Extract to" field, browse to the directory where you wish to save the template and your reports (as determined in Step 1 above).
7. Click on the "Extract" button to save the files to the specified folder.
8. Close the WinZip window by clicking the "X" in the upper right-hand corner.
9. Open Windows Explorer and go to the directory where you saved the files.
10. Double click on the tmpWklyDODULndr.xls file. This will open the Excel report (once you select this file, you cannot open it a second time without completing another full download).
11. Click "Enable Macros."

NOTE: If you do not see the "Enable Macros" option you need to change your Excel spreadsheet security options. Please do the following:

 - Click Tools (with Excel open)
 - Select "Macros"
 - Select "Security"
 - Select "Security Level"
 - Select "Medium"
12. The macro will now invoke, and may take several minutes to complete. You will notice the Excel screen change per the macro instructions. In the meantime, **DO NOT CLICK ANYWHERE ON THE EXCEL SCREEN**, for it may interfere with the macro.
13. Wait until a message pops up in Excel that says "File Saved as... .xls". Click OK.
14. Another pop up message will say "Please remember to save the Formattedxls File to a folder of your choice, before exiting Excel!". Click OK.

In the folder where you saved the files, note the creation of this new Excel file, and the deletion of the previously downloaded WklyDODULender_XXXXXX.txt file. The tmpWklyDODULndr.xls file remains. The report you want to use is the newly created Excel file (it is the larger of the two Excel files).

In Step 2 above, clicking on the "CSV" link will yield similar results; however, the zip file will contain only one file (.CSV) that can be extracted and opened to a folder of your choice, without having to go through the macro as outlined in Steps 11 through 13 above.

DU Refi Plus Reports (Casefiles and Deliveries)

To open your report, follow these steps:

1. First, determine the directory/folder in which you wish to store your report(s). (You may wish to create a new folder on your personal computer for your Desktop Reporting files.)
2. Click on the "Online Summary" link for the report(s) in which you are interested and then navigate to the exact report you would like to view.
3. Click on the "Formatted" or "CSV" link for your desired report, based on how you wish to use the data.
4. When the **File Download** pop-up window appears, click on the "Open" button.
5. The file appears on-screen, ready to use.
6. Click on "File", then "Save As" to save the file to the folder of your choice, as determined in Step 1.

DU Casefile Pipeline Report

To open your report, follow these steps:

1. First, determine the directory/folder in which you wish to store your report(s). (You may wish to create a new folder on your personal computer for your Desktop Reporting files.)
2. Determine how you wish to use the data. If you want the data to be formatted, follow Steps 3 -7. If you want the data to be unformatted, follow Steps 8 – 11.
3. Click on the "Formatted" link for your report.
4. When the File Download pop-up window appears, click on the "Open" button.
5. The WinZip pop-up window appears with the .xls file name. Double click on the Name of the file that you are opening.
6. The file appears on-screen, ready to use.
7. Click on "File", then "Save As" to save the file to the folder of your choice, as determined in Step 1.
8. Click on the "CSV" link for your report.
9. When the File Download pop-up window appears, click on the "Open" button.
10. If the file exceeds the 65,536 Excel file size limit, a pop-up window appears with the error message "File not loaded completely." Click "ok" to continue. The first 65,536 records will be displayed on screen. If you want to display all the data, Skip Step 11 and follow Steps 12 – 15.
11. Click on "File", then "Save As" to save the file to the folder of your choice, as determined in Step 1.
12. Click on the "CSV" link for your report.
13. When the File Download pop-up window appears, click on the "Save" button.
14. The Save As pop-up window appears. Select the folder of your choice to save the file and click on the "Save" button. Make sure that the Save as type is Microsoft Excel Worksheet.
15. Locate the folder where you saved the file to open the file. Since the file exceeds the 65,536 Excel file size limit, the file cannot be opened in Excel. The file can be opened using notepad for viewing or select a tool of your choice that can open a .csv file.

NOTE: *If WinZip does not appear, you may need to install WinZip on your computer. You can do this at www.winzip.com. It should only take a couple of minutes.*

EarlyCheck Reports (Monthly Loan Summary Report, Three-Month Check-Level Summary Report, and Three-Month Subscriber Summary Report)

To open your report, follow these steps:

1. First, determine the directory/folder in which you wish to store your report(s). (You may wish to create a new folder on your personal computer for your Desktop Reporting files.)
2. Click on the "Online Summary" link for the report(s) in which you are interested and then navigate to the exact report you would like to view.
3. If you want the data to be formatted, follow Steps 4–8. If you want the data to be unformatted, follow Steps 9–10.
4. Click on the "Formatted" link for your desired report.
5. When the **File Download** pop-up window appears, click on the "Open" button.
6. The file appears on-screen, ready to use.
7. Click on "File", then "Save As" to save the file to the folder of your choice, as determined in Step 1.
8. If the file exceeds the 65, 536 Excel file size limit, a pop-up window appears with the error message "The number of records exceeds the formatted report threshold limit. Please select the csv format option." Click "ok" to continue. The first 65,536 records will be displayed on screen. If you want to display all of the data, follow Steps 9–11.
9. Click on the "CSV" link for your report.
10. When the **File Download** pop-up window appears, click on the "Save" button.
11. The **Save As** pop-up window appears. Select the folder of your choice to save the file and click on the "Save" button. Make sure that the **Save as type** is **Microsoft Excel Worksheet**.