CAMPUS PARTNERS

myReports

Campus Partners developed myReports to provide a tool for customers who want to create their own custom reports. myReports can create completely customized (**AdHoc**) reports, which allow the customer to specify requirements such as grouping of records by specified criteria, as well as providing totals for the entire reports and/or for each group data within the report. The Ad Hoc tool can quickly produce a simple listing of loans that meet a specific criterion. Reports developed in myReports can be produced once and discarded or can be saved into the customer's folder entitled **My Personal Library** for future use.

Additionally, Campus Partners has developed a suite of reports that are available in the **Public Library** that address many of the known needs of the customers. These reports offer easy-to-use customization options, such as date ranges and sort options.

Report data created in myReports can be printed directly to the customer's local printer or can be downloaded into Word or Excel for additional data processing at the customer site.

Highlights of myReports:

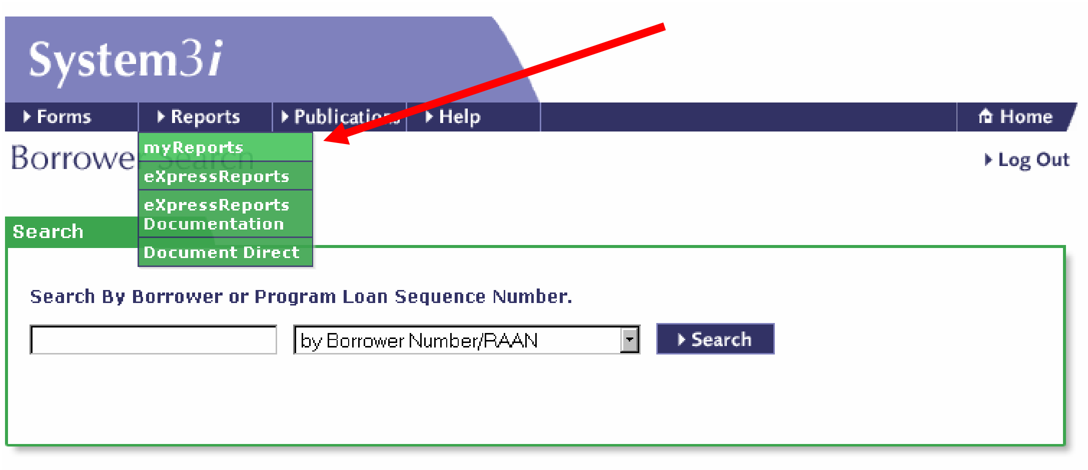
Up-to-Date Data – Data is available as of the end of the prior post date
Security Features – The data is secured in the same manner as data accessed via System 3*i*
Standard Customized Reports – A group of standard customized reports, commonly requested by customers, has been created to make creating customized reports even more convenient.
Completely Customized Reports – If you want to create reports that are specific to your school. Criteria may include: alpha or numeric sort, specific data qualifiers (like # days past due)
View Print and Archive of Customized Reports – Your saved reports are stored in a personal library that you can access as needed.
Automated Report Creation – Standard and saved reports can be produced on demand or scheduled to automatically produce on a routine basis.

After this session, you should expect to have learned the following:

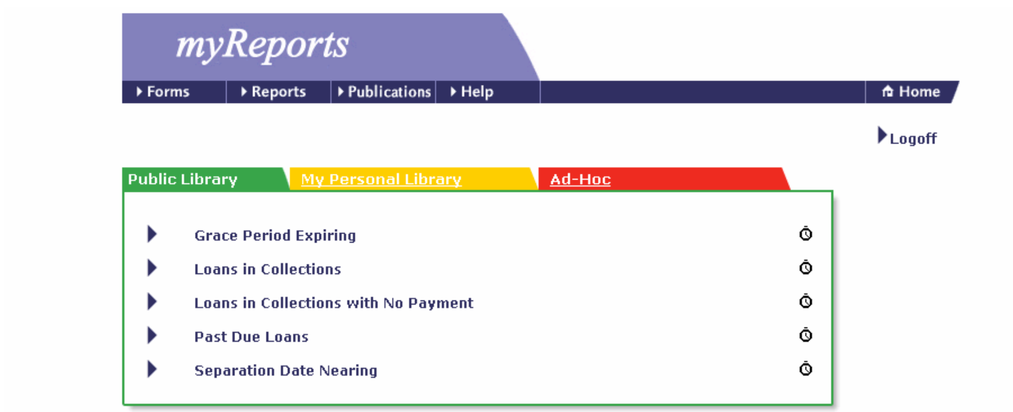
- What is myReports
- How to get started in the Public Library
- What information is saved in my Personal Library.
- How to Use the Ad Hoc Feature

Getting Started:

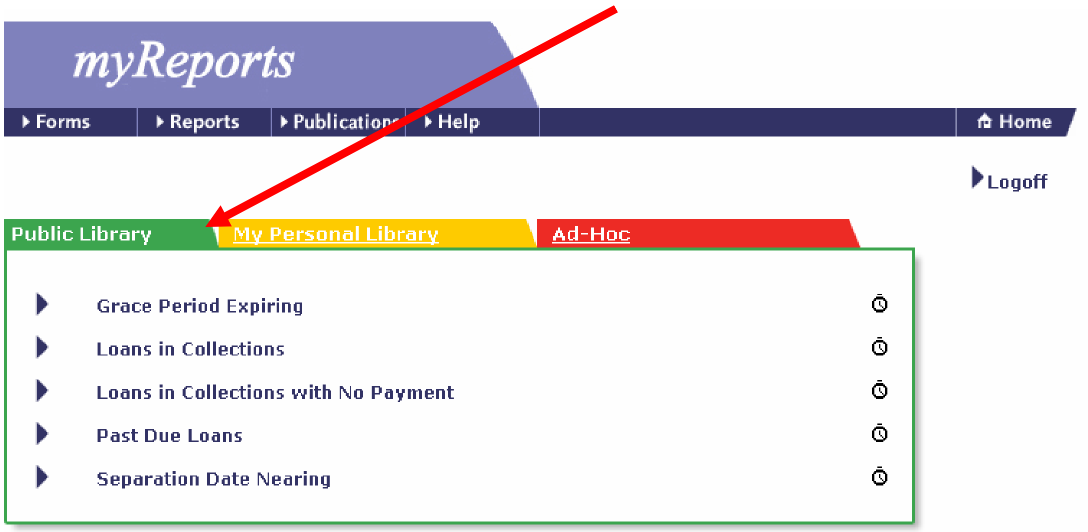
myReports is available through System3*i*. Once you have logged into System 3*i* (https://system3i.campusparters.com) with a valid ID and password, you will see the Borrower Search page. In the System 3*i* toolbar displayed in the upper portion of the page, you will see a link to Reports. The myReports link is listed under the Reports link.



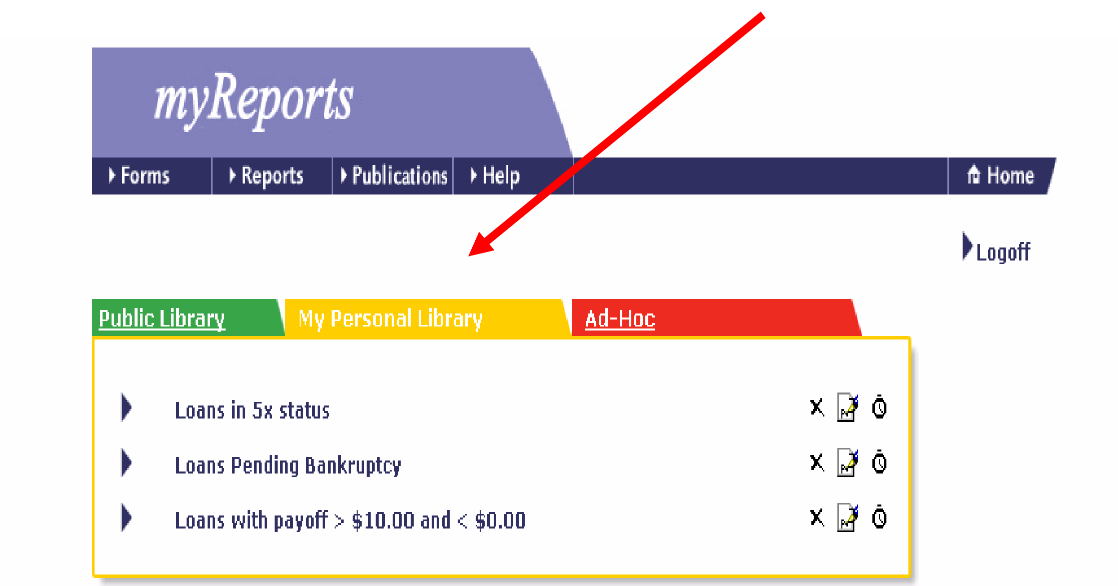
Once you click on the myReports link, you will receive the primary Web page for myReports. Here you will see three different tabs: **Public Library, My Personal Library, and Ad-Hoc.**



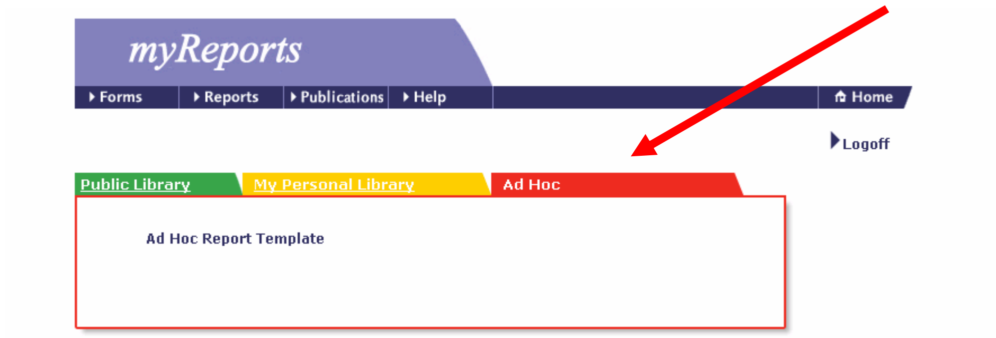
Public Library:
At the present time, the Public Library contains 5 reports that were developed based on the most commonly requested special reports from our customers. These reports will allow customers to add limited parameter selections to the basic reports. An example would include selecting the "number of days past due" range on the Past Due Loans Report. Clicking on a specific report will automatically open the parameter selection page, where you can make your selections and create your report.



My Personal Library:
The Personal Library will allow customers to store the custom report that they have developed and saved using the Ad-Hoc tool. A customer will have complete control to any reports that have been created and stored in this area. Customers are able to run the reports as needed, delete the reports if they are no longer needed, edit the selection criteria used to create the report or even schedule the report to run automatically.



Ad-Hoc:
In the AdHoc folder, there is a template available for the school to use to develop customized reports. There are several customization options available: from filtering options if you want to eliminate specific loan records that do not meet your criteria to adding formulas or charts into your reports.

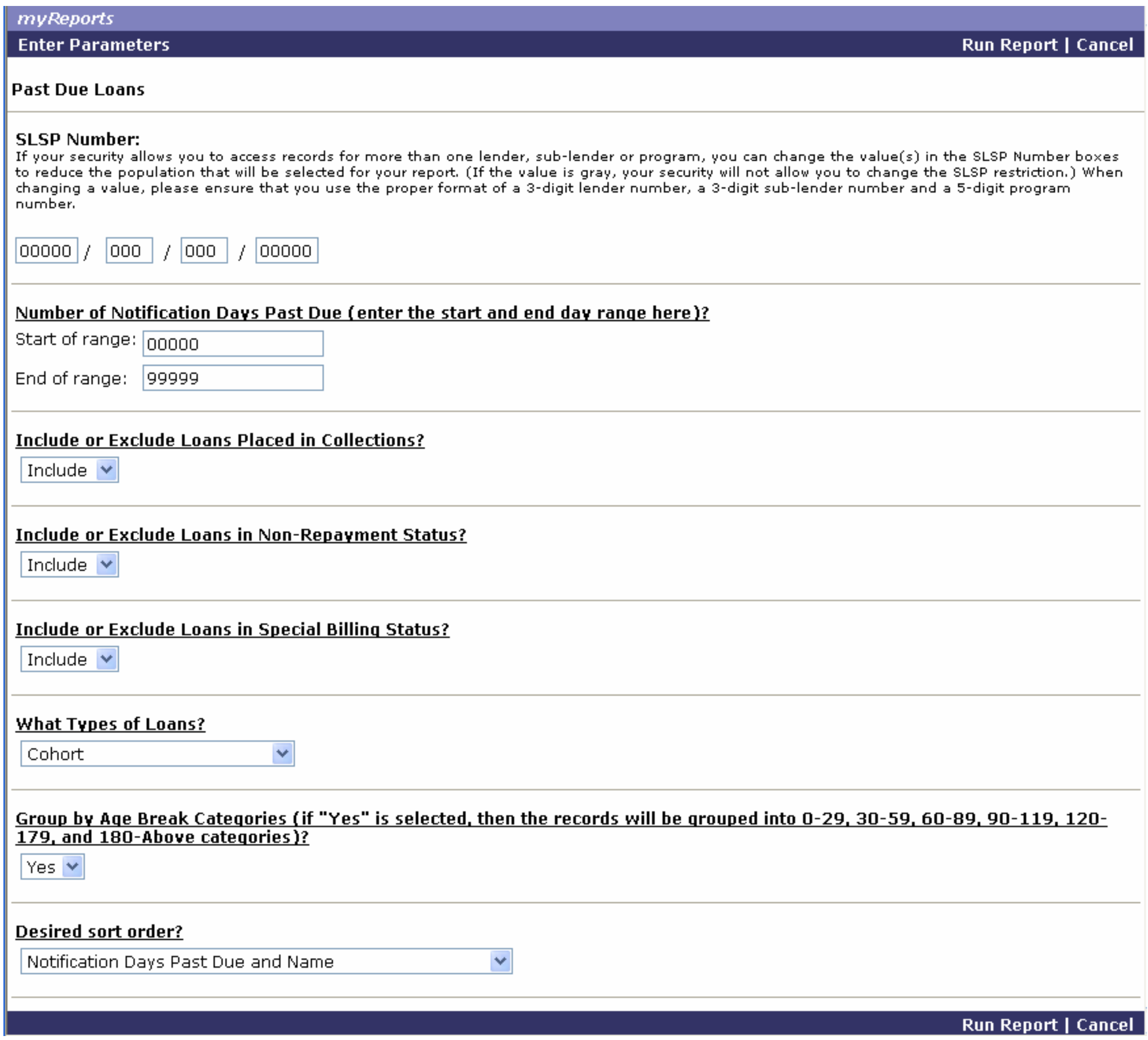


How to Run a Report:

By choosing the Public Library, you can select and run any report that is listed in the Public Library. These reports include:

- Grace Period Expiring
- Loans in Collections
- Loans in Collections with No Payment
- Past Due Loans, and
- Separation Date Nearing

STEP 1: Selecting a Report
To select a report to run, you would select the specific report link you were interested in. For example, the **Past Due Report**. Once selected, you will receive a page where you would enter report parameter choices. If you have access to records for more than one lender, you will need to enter the SLSP Number.


myReports

Enter Parameters — **Run Report | Cancel**

Past Due Loans

SLSP Number:
If your security allows you to access records for more than one lender, sub-lender or program, you can change the value(s) in the SLSP Number boxes to reduce the population that will be selected for your report. (If the value is gray, your security will not allow you to change the SLSP restriction.) When changing a value, please ensure that you use the proper format of a 3-digit lender number, a 3-digit sub-lender number and a 5-digit program number.

00000 / 000 / 000 / 00000

Number of Notification Days Past Due (enter the start and end day range here)?
Start of range: 00000
End of range: 99999

Include or Exclude Loans Placed in Collections?
Include

Include or Exclude Loans in Non-Repayment Status?
Include

Include or Exclude Loans in Special Billing Status?
Include

What Types of Loans?
Cohort

Group by Age Break Categories (if "Yes" is selected, then the records will be grouped into 0-29, 30-59, 60-89, 90-119, 120-179, and 180-Above categories)?
Yes

Desired sort order?
Notification Days Past Due and Name

Run Report | Cancel

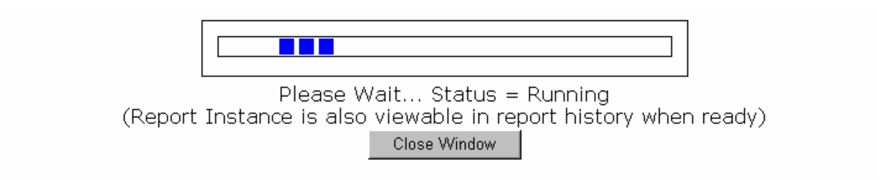
STEP 2: Complete each of the questions
Enter the desired start and end ranges and answer each of the questions. Use the drop down box arrow to see a list of options.

Once the selections are complete, select “Run Report” at the top or bottom of the page.

If for some reason you do not need the report, you may select "Cancel". Doing so will take you back to the Main Menu of myReports.

STEP 3: Checking Report Status

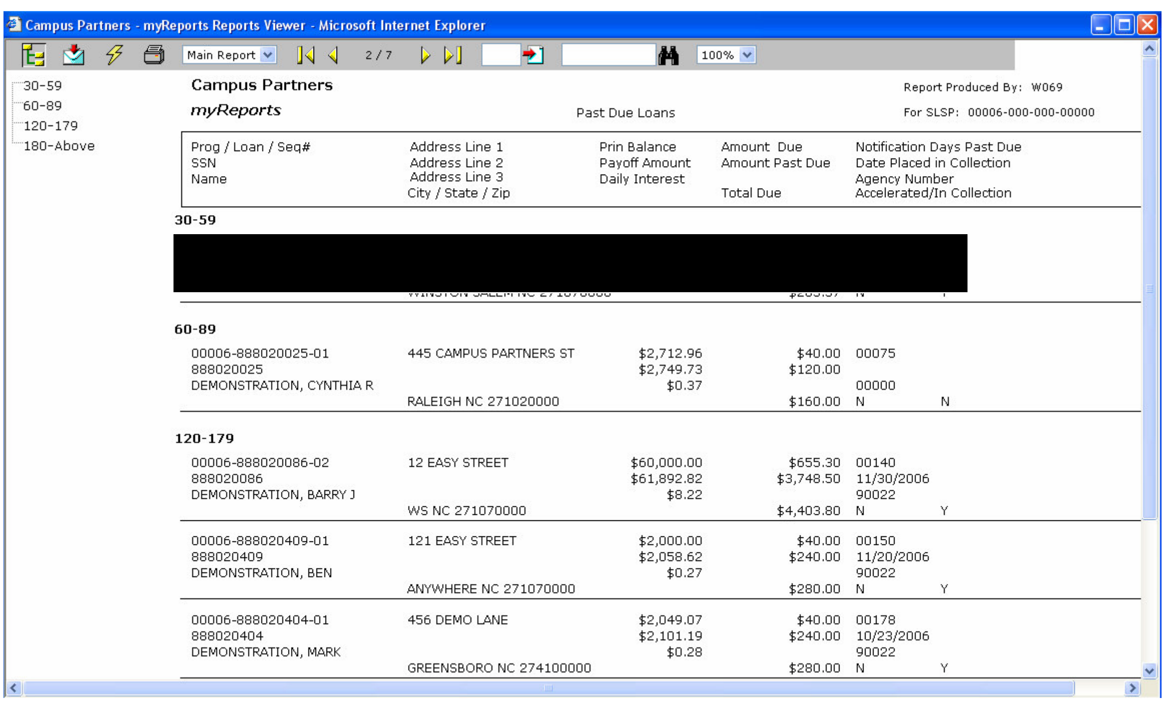
While your report is running, you will see a page with the message **"Please Wait…Status=Running"**. When the report is finished, a report header page with the name of the report and the report parameters will be displayed.



STEP 4: Reviewing the Report

If you choose to view the report, it would then be displayed in a new window that you can close when you are finished reviewing the report.

After the report has been run, you have several options available to you from the toolbar at the top of the "Report Viewer". These options would include exporting the report (for example into Word or Excel), printing the report, going to the first, previous, next or last page of the report, or even selecting a specific page within the report.



STEP 5: Report History
Each time you run a report from the **Public Library**, the report will be saved as a historical instance of the report. You can select the report for viewing by clicking on the report date and or time.

Additional options available:

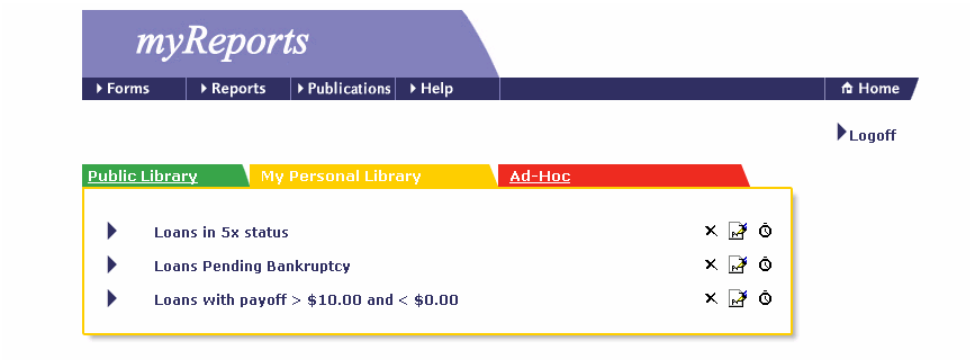
- You may review the report parameters that were set up when the report was created
- You may delete a report that is no longer needed
- You may schedule a report to run from two different schedules: the first business day after month end processing or the first day of each week.

There are additional features of myReports through:

- **My Personal Library**
- **Ad-Hoc Template**

My Personal Library:

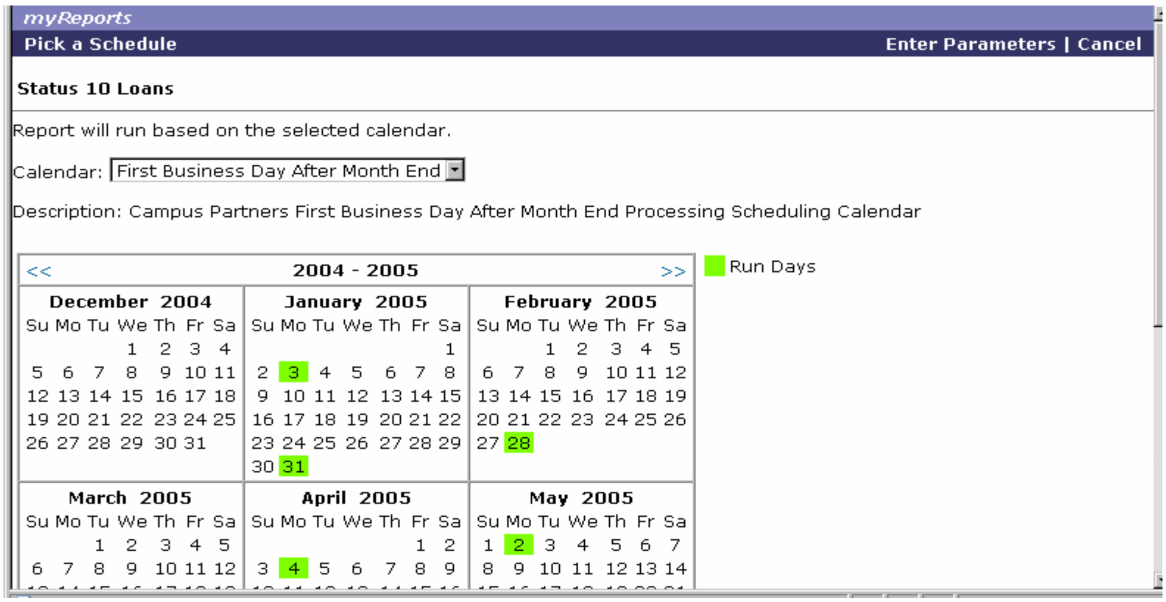
As with the Public Library, **My Personal Library** will contain a list of reports that you have created and stored in myReports by using the **Ad-Hoc** template. As the user, you have complete control over the reports that are in your Personal Library. You have the ability to run the reports as needed, delete them as necessary, edit the selection criteria used for running the report as well as scheduling the report to run automatically using the calendar scheduling option.



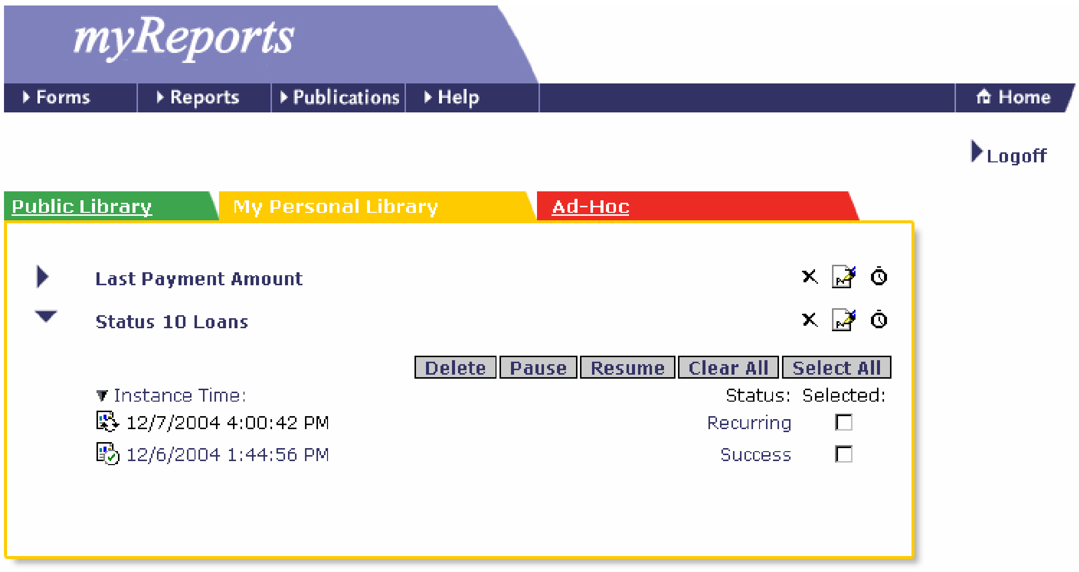
You may view a report in the same fashion as you would when viewing a report through the **Public Library:**

1. By clicking on the arrow to the left of the report name, you will receive the history of the report.
2. To launch the report, you would need to double click on the report name itself.
3. You may delete reports that are no longer needed by clicking on the "X" that is to the right of the report
4. Editing the report is available by clicking the icon directly to the right of the delete icon. (The icon resembles a piece of paper with a pencil.)
5. If you were to click on the clock icon to the right of the specified report, you would be able to schedule the report to run at a specified date and time.

Example: Report Scheduling
Once the scheduling icon has been selected, you will be directed to the report scheduling screen. On the Report Scheduling screen, you can choose from two schedules: the first business day after month end processing or the first day of each week. The calendar listed will show you the days that the report will be run each month. After the decision has been made for scheduling, you will need to click **"Enter Parameters".**

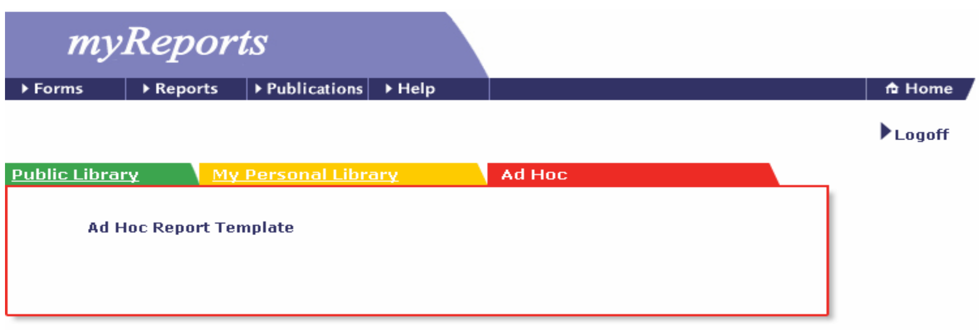


Special Note – If you choose to suspend the automatic running of a report for a period of time, you may "Pause" the report. You would need to select the appropriate report by checking the appropriate box and selecting the "Pause" button. When you decide to resume this scheduled report, select the report and press "Resume".



Creating Customized Reports – Ad-Hoc Feature

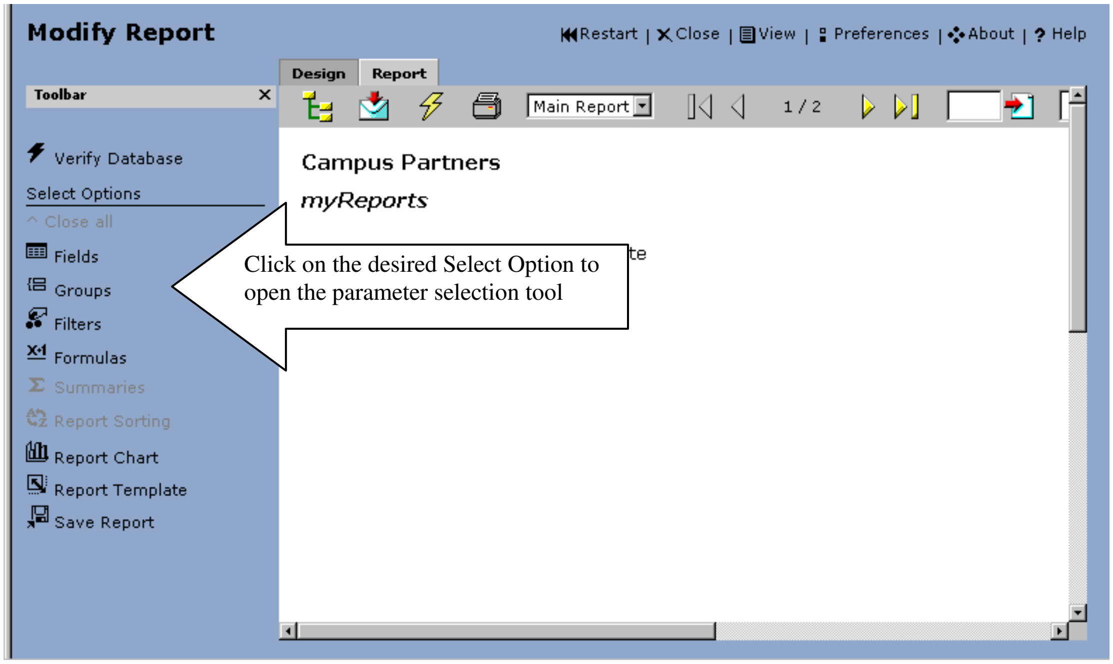
The Ad-Hoc template is the starting point in developing a completely customized report.



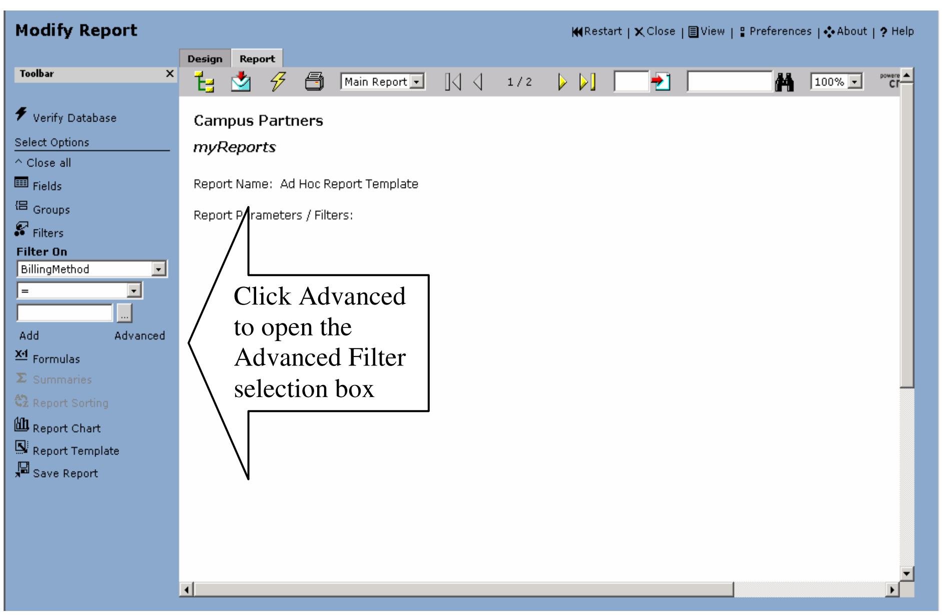
Click on Ad Hoc Report Template

STEP 1 - Ad-Hoc Filters

This is the beginning step to the report development process. Filters are used to eliminate loan records from your report that do not meet the criteria you are looking for to include in your report



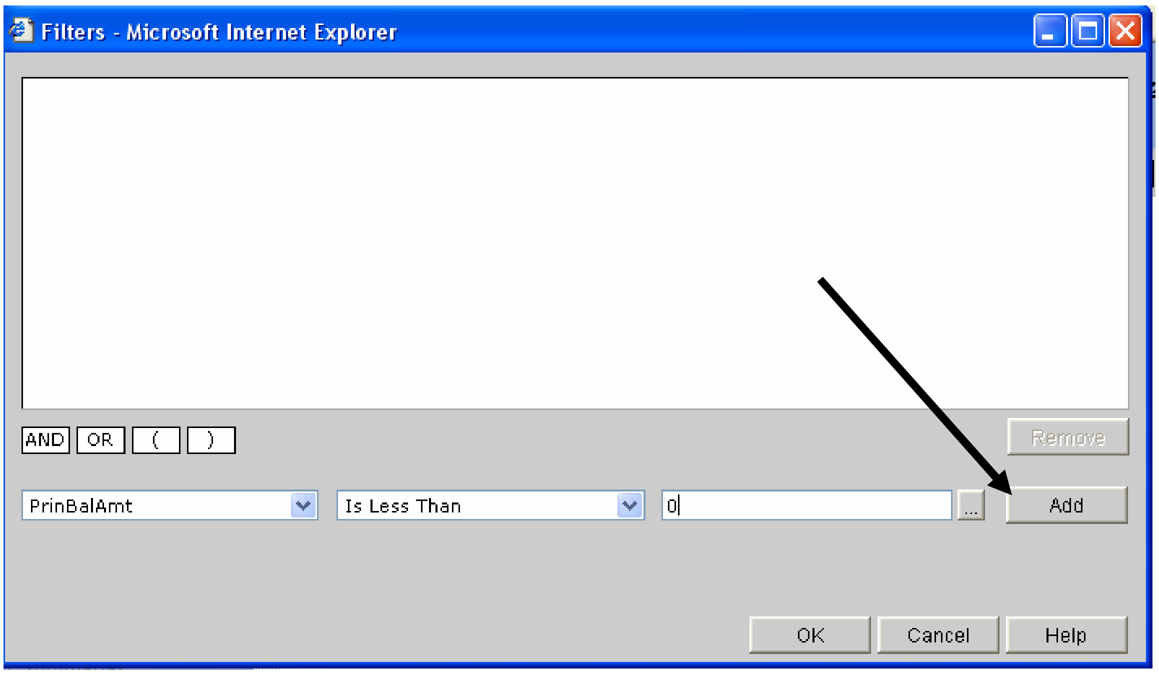
When selecting the filters to include in your report, you may select the filter parameters from the drop down boxes that are provided, or you can click on the "Advanced" tab where you are able to view the parameters as you build them for your report. This is especially helpful if you are including more than one filter in your report.



When you do choose the Advanced Filter option, there will be a filter selection window available to you to actually apply the filter.

Directions for applying filters:

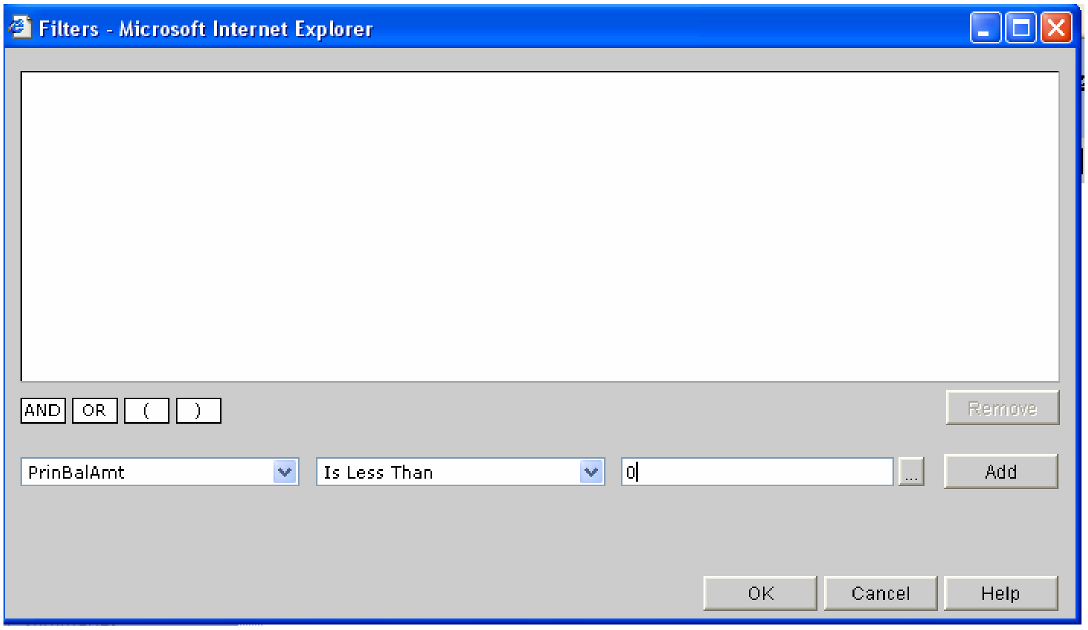
1. From the first drop down menu, you would need to select a field that would need to be filtered.
2. With the second drop down menu, you would select the operator that best fits the selected field. For example, if the selected filter PrinBalAmt and the report should only list loans with a principal balance less than "0." ****There are several operators that are available such as "Is Not Equal To," "Is One Of," "Is Not One Of," "Starts With," etc.**



3. To populate the third drop down box, enter the first desired value in the box labeled "Enter Value Here" and click the buttons with the arrows located to the right. Once the value has been entered, it will appear in the third drop down box. You would need to repeat this process for each value that you want entered. In the example shown, the values included are 85 and 95.

4. To **ADD** the filters that have been created, all you have to do is click the "Add" button.

5. If you choose to add additional filters, an "AND" or "OR" must separate each filter.

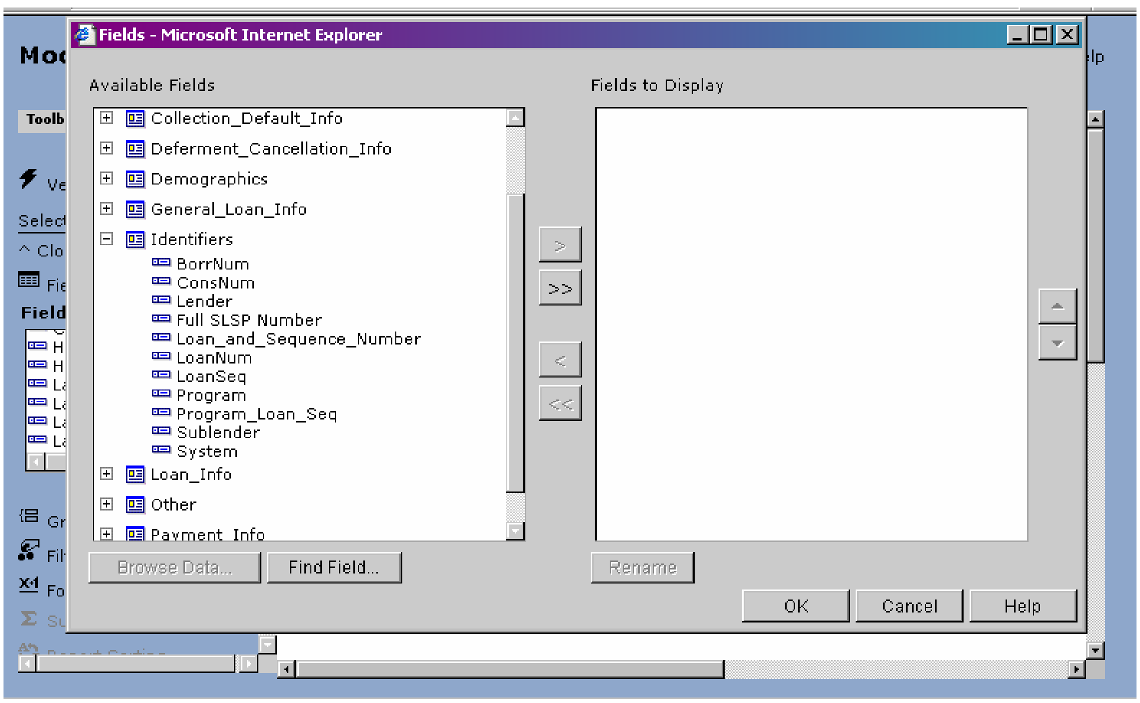


6. If you would like to remove an element of a filter, you would need to highlight the element and click "Remove".
7. Once all filters have been created, click the "OK" button.

STEP 2: Selecting Ad-Hoc Fields

The next step in creating your customized report is to select the fields that should be displayed on the report. You would need to click on the Select Options labeled "Fields". You have the option to select the pre-assigned fields, or you may go through the Advanced option to open a window and view the parameters as you build them. Again, the Advanced option is beneficial if your report will contain more than one field parameter. To choose a field from the list, all you would need to do is highlight the desired field. There will be an asterisk to the right of the field name.

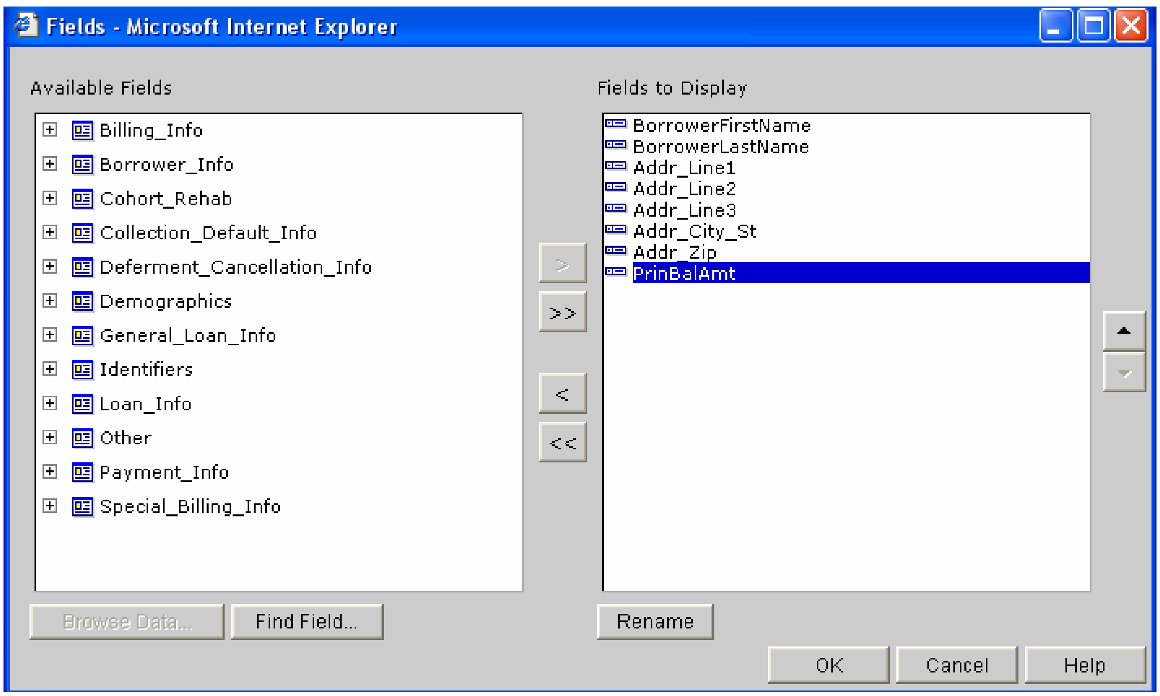
Expanding Fields:



The fields you choose to display on your report will need to be moved to the right side of the screen in the area labeled “Fields to Display”. To move a name to the “Fields to Display” area, you can:

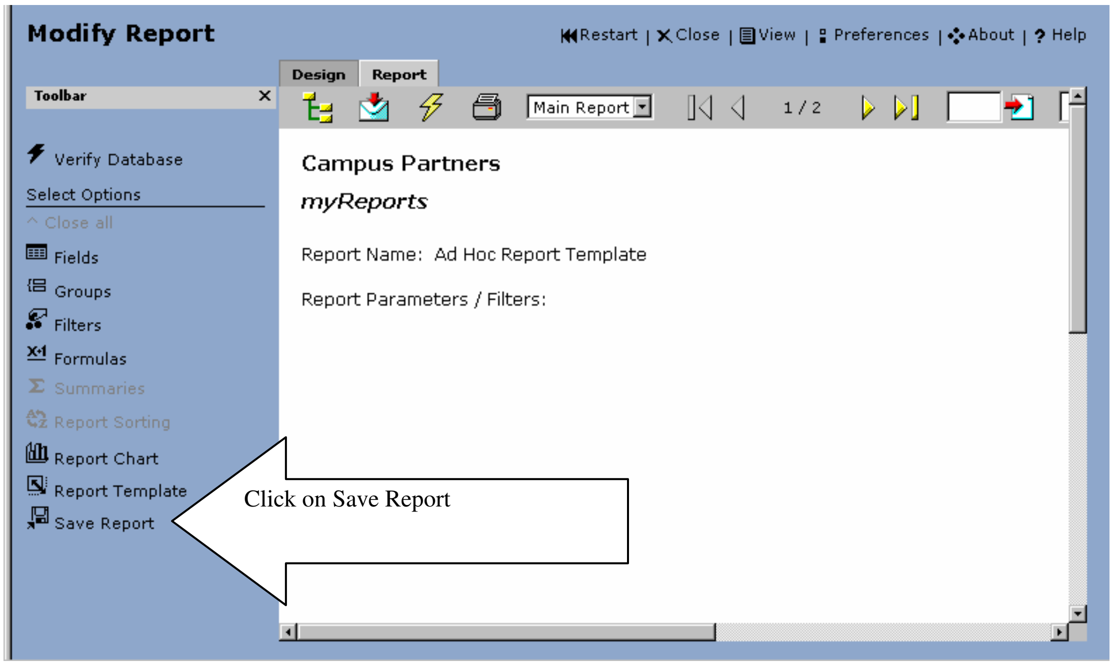
1. Click on the specified field name
2. Select any field name and click the appropriate arrow to add/remove
3. Highlight multiple fields at one time by holding down the SHIFT key as you left click on each field name, or
4. Drag fields from one side to the other.

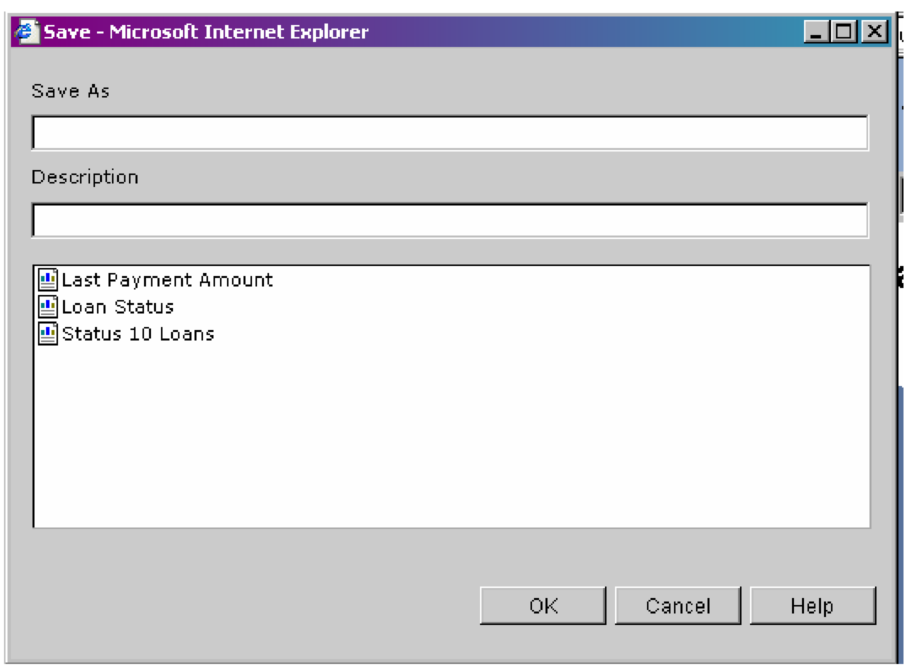
Example:



STEP 3: Saving Your Customized Report

1. Click on the "Save Report" select option on the Modify Report page. This will launch a separate "Save" window.
2. In the "Save As" box, type the name for the report.
3. Type any extra information about the report in the "Description" box
4. Click "OK" to save your report





Your report will now be listed in My Personal Library with the name that you typed in.

Follow the steps on Page 8 to run the report.