Export FocusAgent Data to Excel

Wednesday, May 3, 2017 9:13 AM

By default, FocusAgent will look for reports that reside in the user's Documents directory, in a \FocusAgent Reports folder.

ne Share View

💠 Report Manager

C:\Users\!\Documents\FocusAge	nt Reports		
Name	Date modified	Туре	Size 🗸
ReportTemplate.xlsx	1/15/2016 10:18 AM	Microsoft Excel W	19 KB
🖬 Loan Portfolio Imaging Report.xlsx	5/3/2017 8:50 AM	Microsoft Excel W	22 KB
🖬 Issue Report.xlsx	3/10/2015 10:28 AM	Microsoft Excel W	584 KB
HMDAReportProof.XLSX	2/28/2017 2:09 PM	Microsoft Excel W	141 KB
📳 HMDA2016Template.xlsm	2/21/2017 11:20 AM	Microsoft Excel M	234 KB
🕼 FocusAgent Loan Report All.xlsx	12/12/2016 10:46	Microsoft Excel W	40 KB
CreditReports.xlsx	2/28/2017 8:41 AM	Microsoft Excel W	51 KB

In FocusAgent.	click the Excel	icon on the	left hand side, t	o load the Repo	rt Manager
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Note: If you do not see an Excel icon within FocusAgent, you may need to verify whether or not you have either a **Folder Manager** or **Administrator** role, to have the ability to export data out of FocusAgent into Excel. Clicking on the Role pick list, will allow you to view whether or not you can click to enable either role.

Role	Multiple (3)	۲	Folder>	View>			
	Guest						
	🖌 Administrator, Brenda's Test Comp						
	Folder Manager						
	Loan Closer						
	 Loan Officer 						
	🖌 Loan Processor						
	Loan Underwriter						

In the Report Manager dialog. Click to highlight the report you wish to run.

Select a report to run	
HMDA2016Template.xlsm	
HMDAReportProof.XLSX	If you need to modify the
Issue Report.xlsx	start date when you wish
Loan Portfolio Imaging Report.xlsx	to begin the data export,
ReportTemplate.xlsx	click on Configure/View
Run Configure/View	-

2	5
	Load Report Manager

Excel will then load the report. Notice that there is a **Parameters** tab. This worksheet contains the unique FocusAgent identifier's that will be used to pull data requested out of FocusAgent and, into the Excel workbook. By and large you will not want to make changes to any unique identifier's on the Parameters tab unless you have an understanding of proper binding's and how to create reports.

Cell B3, which reflects the Folder Creation Date, is the cell that end user's may modify as needed. This date specifies the start date when you wish to begin your data export. If needed, modify the folder creation date, and then save your workbook with the updated change.

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With the desired date saved, close excel and return to FocusAgent.

	4	Report Manager
		Select a report to run
		HMDA2016Template.xlsm
		HMDAReportProof.XLSX
		Issue Report.xlsx
		Loan Portfolio Imaging Report.xlsx
		ReportTemplate.xlsx
Click to Run the report.		Run Configure/View

As the report collects the data, the dialog will display the number of folders found, and a progress bar.

HMDA2016Template.xlsm		
HMDAReportProof.XLSX		
lssue Report.xlsx		
Loan Portfolio Imaging Report.xlsx		
ReportTemplate.xlsx		
STOP	Configure/View	

When progress is complete, if Excel loads behind the scenes, you may need to click on the Excel icon in the system tray, to open the report after it has finished running.

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Within the Excel report, click on the **DataSet** tab to review the data that was collected.

It is then **best practice** to do a **File** and **Save As** and <u>save the report with data</u> in a **different location**. Otherwise, if you save the file in the existing \FocusAgent Reports \ folder, any data or report changes will be overwritten the next time you run the report. Best practice is to save collected data elsewhere while conducting Excel report changes, for formatting and customizing data manipulation to your needs. This also safeguards from affecting the base Parameters tab, needed for running reports and collecting data.

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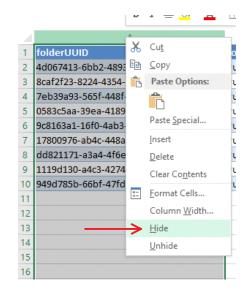
In this example, I have created an \Exported Reports\ folder in my Documents directory, where I will save the exported report to. I am also renaming the report to an identifiable name, according to how I plan to filter my report data.

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Now I can filter and modify my report in the other directory without affecting the base report.

Some ways in which you may wish to modify and manipulate the collected data, may include some of the following ideas;

You will notice that FocusAgent will always insert a folderUUID column at the front. This is for your troubleshooting needs, in the event you may want to load that specific folder to review data entered in FocusAgent. If you do not wish to see this custom ID on your final report, you may want to right click on the column header in order to hide the column.



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You may also want to consider using filters. Clicking on the down arrow next to a column header, will allow you to select the types of loans you wish to display.

Filter any number of ways you may want the report to display, as well as save the report in any number of needed ways.