

CoreLogic® Excel Plug-In

Installation and Reference Guide



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Overview

The CoreLogic® Excel Plug-In allows you to access the CoreLogic web-based application directly from Microsoft® Excel. Once the reports are run, the output is delivered to an Excel workbook and includes the ability to refresh or rerun the reports. You may run multiple reports through the plug-in to one workbook.

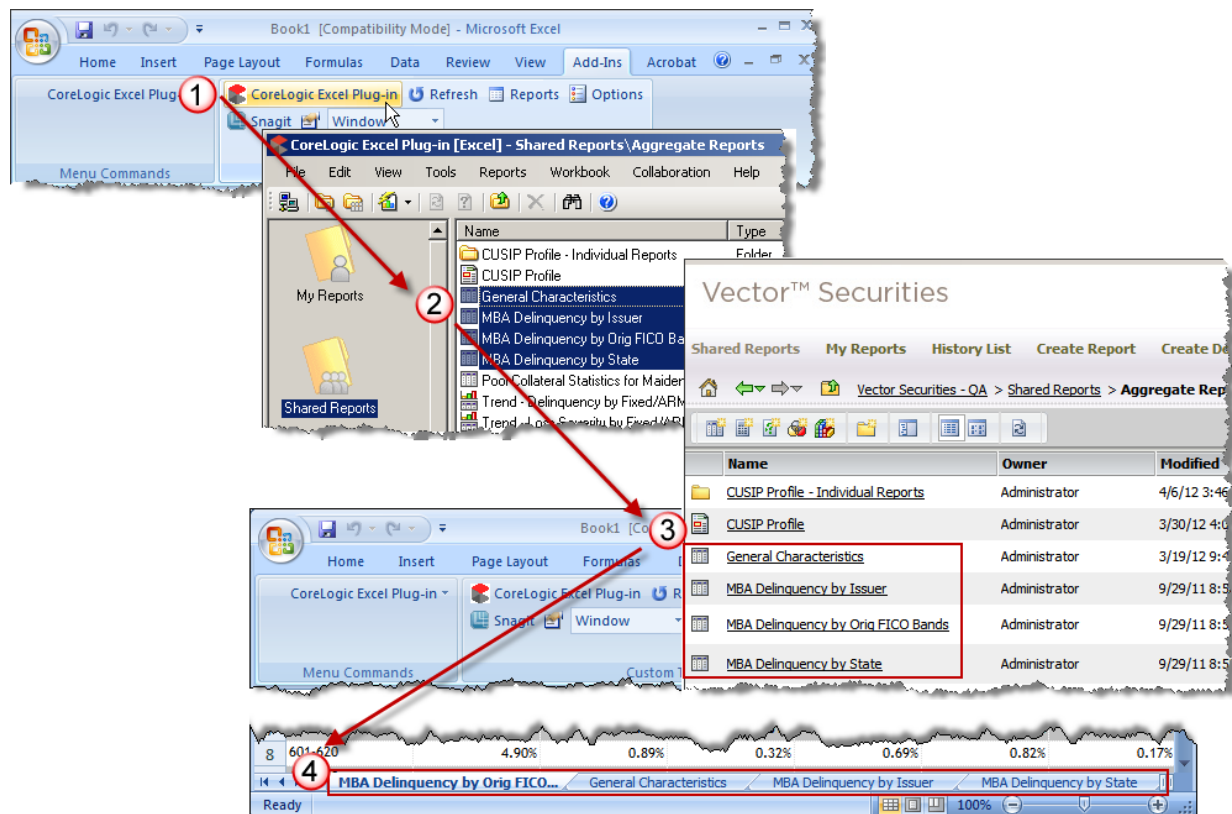
If you link output contained in the workbook generated through the plug-in to a document in a text-editor such as Microsoft® Word, when you refresh or rerun the report(s) from the workbook, the data in the Word document is automatically updated.

The following is a graphical representation for running a report from the CoreLogic Excel Plug-In.

- ① Access the CoreLogic Excel Plug-In from the Add-Ins menu in Microsoft Excel
- ② Once logged in, access the report option(s) you wish to run and select Run Report
- ③ The Plug-In runs the reports as defined in The CoreLogic web-based application
- ④ Output for the report(s) is automatically downloaded to workbook in Excel

Note: The output generated from the Excel plug-in will be linked to the report definition in The CoreLogic web-based application and may be refreshed or rerun from Excel. When you use the Export option from within the CoreLogic web-based application, there is no connection between the Excel workbook and the CoreLogic web-based application.

Note: The CoreLogic Vector Securities application was used for all screenshots in this document. The reports and features in this document may not be available in the CoreLogic web-based application you are using.



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Installing the CoreLogic Excel Plug-In

System Requirements

The following are system and hardware requirements to install MicroStrategy Office:

1. You must have .NET 3.5 or a higher version installed on your computer.
You can check this by going to C:\Windows\Microsoft .NET\Framework
Or you can check the following registry key to determine where it is installed:
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NETFramework\InstallRoot
2. Windows installer version 4.5 or higher should be installed.
3. 32-bit Microsoft Office should have be installed. Only 32-bit Microsoft office is supported.

Steps to Install the CoreLogic Excel Plug-In

To install the CoreLogic Excel plug-in, follow the steps below:

1. Open one of the CoreLogic data applications that support the Excel plug-in and log on with your standard user ID and password.
2. The primary toolbar will include an option to Install Office Plugin.

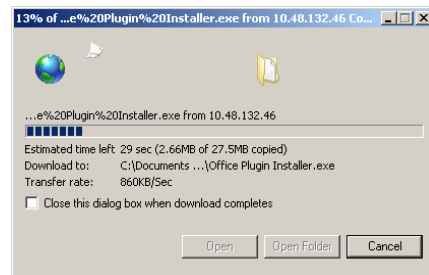


3. When you click the toolbar hyperlink, you will receive the following dialog.



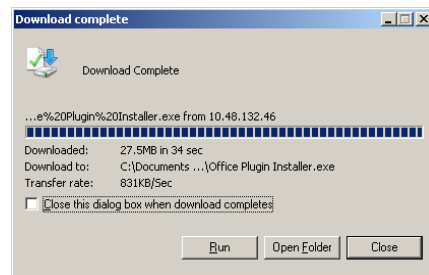
4. Click Save and specify a location to download and save the installation program file.

5. The file will download to the specified location.

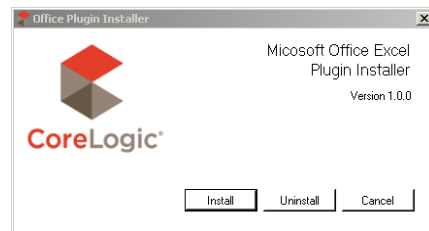


6. Once the installation program file is downloaded, click the option to Run the installation program. If you receive a Security Warning, click the Run button to continue.

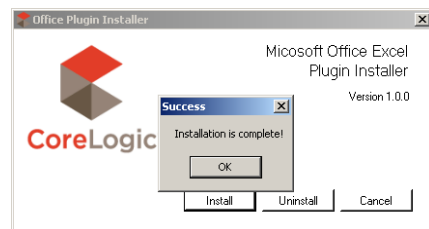
Note: If you cannot run the installation program, you can click the Close button and start the installation at a later time by clicking this installation program file.



7. The following Office Excel Plugin Installer dialog is presented. Click the Install button to begin the installation.



8. Once the CoreLogic Excel Plug-In has been installed, you will receive the following message. Click the OK button to close the Installation dialog.



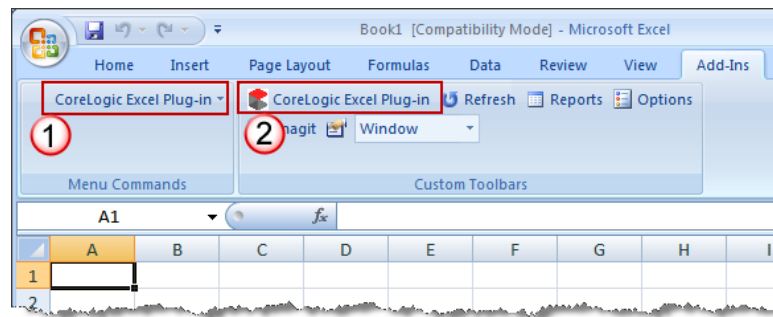
Post Installation Verification

Once you have installed the CoreLogic Excel Plug-In, you should verify that the installation is complete and the plug-in is available from Excel. The plug-in should be included when you open Excel and click the Add-Ins menu.

Verify the CoreLogic Plug-In is available from Excel Add-Ins Ribbon

When you open Excel, you will have a new option on the Add-In toolbar ribbon for CoreLogic Excel Plug-In. The CoreLogic Excel Plug-In includes:

- ① A drop down menu with limited processing options
- ② CoreLogic Excel Plug-In toolbar button. When you click this button, you will connect to the CoreLogic data server and will be presented with a Log In dialog. Once you log in, this button will display the CoreLogic Excel Plug-In user interface dialog window.



The installation may complete successfully, but you may not have the Add-Ins ribbon option or, if the Add-Ins ribbon option is there, you may not see the CoreLogic Plug-In option. There are two reasons for this:

- Microsoft Office 2007 or earlier will always display the Add-In ribbon option, but Office 2010 or later allows you to disable the ribbon.
- Even if the ribbon is enabled, the CoreLogic Excel Plug-In may not be enabled from within Excel.

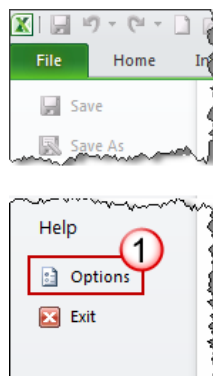
The following sections provide guidance to enable the Add-In ribbon option in Microsoft Excel 2010 or later and to enable the CoreLogic Excel Plug-In for your Excel installation.

Enable the Add-In Ribbon in Excel

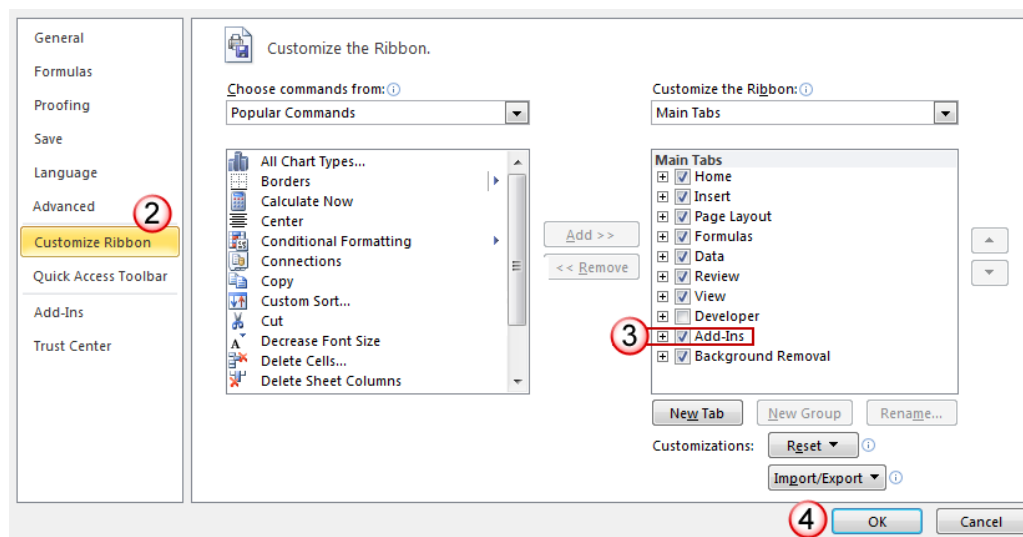
Microsoft Office 2010 allows you to enable/disable ribbons from the user interface. If the Add-Ins ribbon has been disabled, you will not have access to the CoreLogic Plug-In. The following steps outline how to enable the Add-Ins ribbon in Excel 2010 or later:

Note: Microsoft Office 2007 and earlier does not allow you to enable/disable ribbons.

1. Open Excel and click the File menu and select Options.



2. Once the Options dialog is presented, click Customize Ribbon to display the customization options.
3. Check the Add-Ins option checkbox. When this option is unchecked, the Add-Ins ribbon is hidden from view. When this option is checked, the Add-Ins ribbon is displayed.
4. Click the OK button to save your changes. The Add-In ribbon option should now appear.

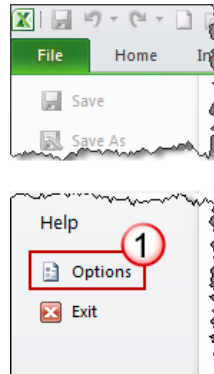


Enable the CoreLogic Plug-In from within Excel

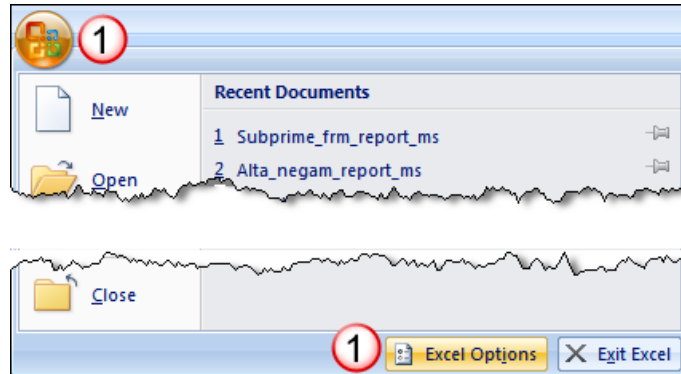
If the Add-In ribbon option is enabled but the CoreLogic Plug-In does not appear in the ribbon, you may need to enable the CoreLogic Plug-In from within Excel. This applies to any version of Microsoft Excel. The following steps outline how to enable the CoreLogic Plug-In for Excel:

1. In Excel 2010 or later, click the File menu and select Options.
In Excel 2007 or earlier, click the Office button and select Options.

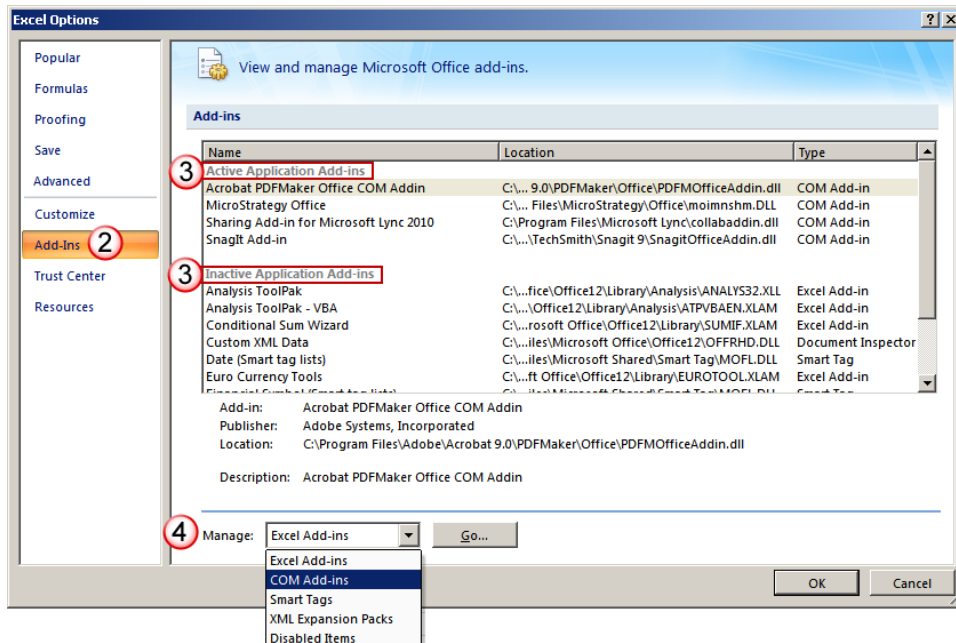
Excel 2010 or Later



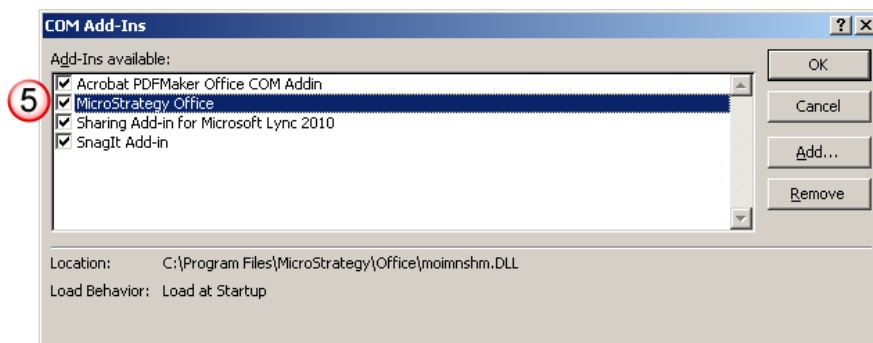
Excel 2007 or earlier



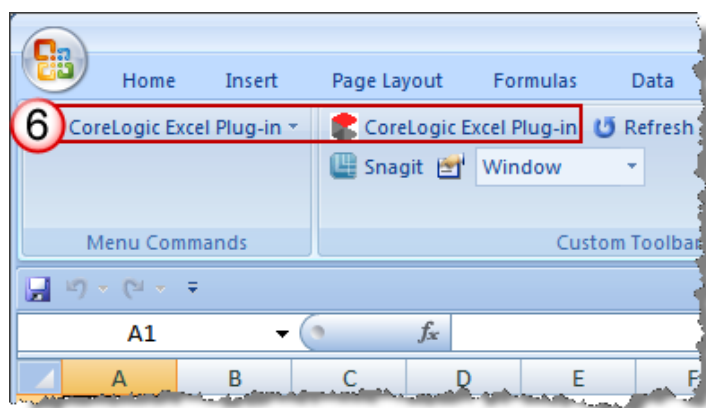
2. Once the Options dialog is presented, click Add-Ins to display the list of add-in programs you have installed.
3. The list will be separated by Active and Inactive Application Add-Ins. If the installation was successful, but the CoreLogic Plug-In does not appear, it should be included in the list of Inactive Application Add-Ins.
4. In the Manage option at the bottom of the window, select the COM Add-Ins from the drop down list and click the Go button to display the list of COM Add-In programs.



5. Once the COM Add-Ins dialog is displayed, check the box for the MicroStrategy Office COM add-in (this is the CoreLogic Plug-In) and click the OK button.



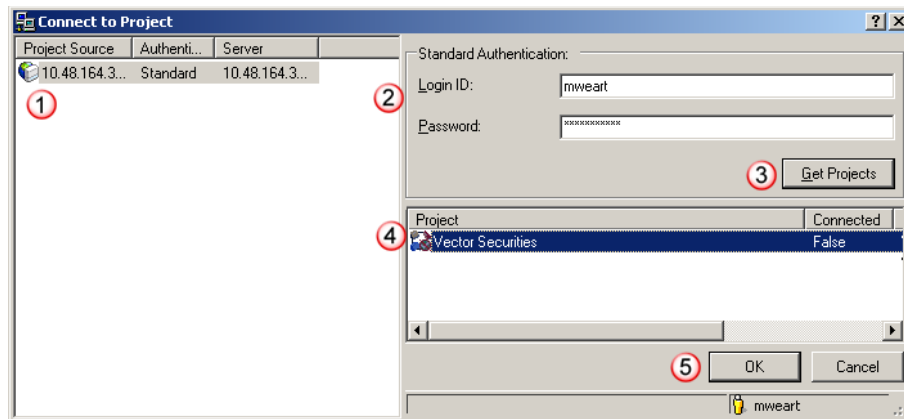
6. Once you have enabled the CoreLogic Excel Plug-In COM add-in option, the Add-Ins ribbon will display the CoreLogic Excel Plug-In drop down menu and toolbar button to access the CoreLogic web-based application through Excel.



Connecting to the Web Application through the Plug-In

When you click the plug-in option from the Add-Ins menu, the Connect to Project dialog window is presented. Enter your Login ID and password from the CoreLogic web-based application and then click the Get Projects button. The projects available for selection are displayed.

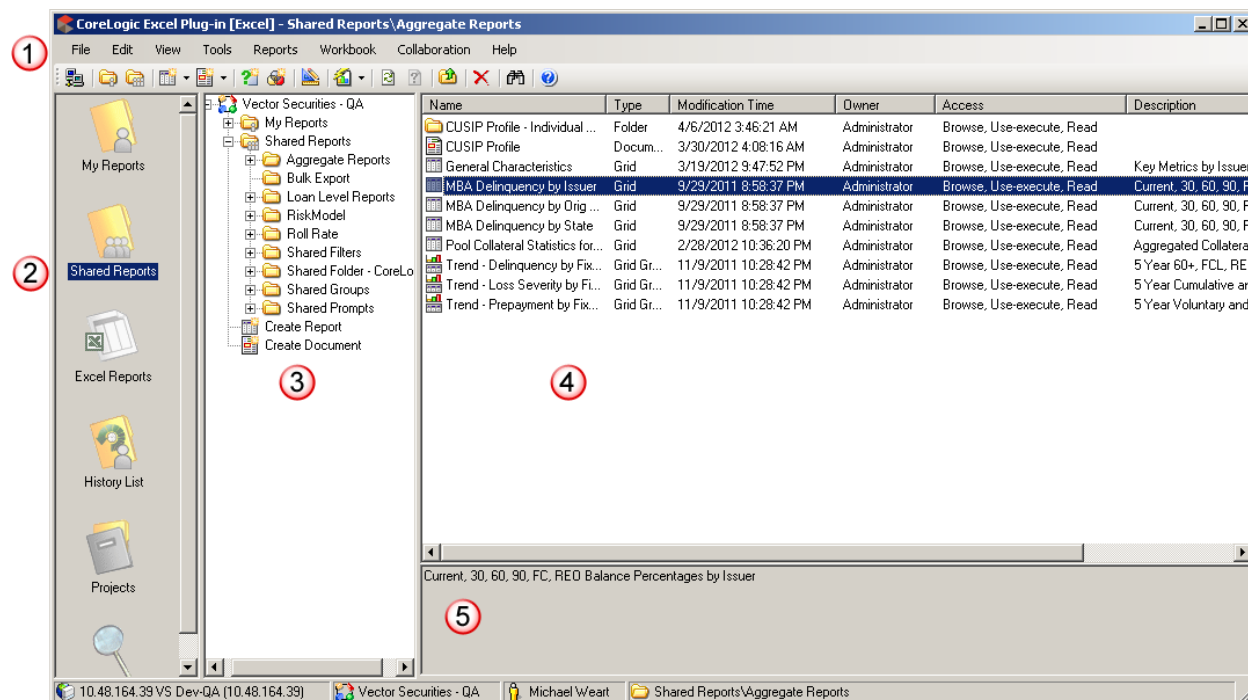
- ① Project Source and Web Server are predefined and should not be changed
- ② Enter the Log In and Password using your CoreLogic web-based application account
- ③ Click the Get Projects button to display a list of projects to access via the plug-in
- ④ Click a project to highlight and select
- ⑤ Click the OK button to connect to the CoreLogic web-based application through the plug-in



CoreLogic Excel Plug-In Main Window

Main Window

Once you have accessed the plug-in, the following window is presented. This window provides access to all the options available from within the CoreLogic web-based application.



The elements of this window are as follows:

- 1 Menu and Toolbar** The window includes a menu bar that provides access to all functional options for the plug-in and a toolbar with the most commonly used options.
- 2 Shortcut Bar** This toolbar provides options to access the folders available in the CoreLogic web-based application (e.g., My Reports and Shared Reports, History List).
There are additional options to display the Excel Reports that have been executed and are currently open for editing, change the project you are currently linked to through the plug-in and an option view the results of an object search in the CoreLogic web-based application.
This panel is enabled by default upon installation and may be toggled to show/hide from the View menu.
- 3 Folder Tree View** This panel displays the folder hierarchy in the CoreLogic web-based application and allows you to navigate through the folders similar to Windows Explorer. When you click on a folder or report option in the tree view, the Contents panel is refreshed to display your selection.
This panel is hidden by default upon installation and may be toggled to show/hide from the View menu.

4 Contents Panel

This panel displays the contents of the option you have selected as follows:

- ▶ When My Reports is selected, the folder contents in the CoreLogic web-based application are displayed in the Contents panel.
- ▶ When Shared Reports is selected, the folder contents in the CoreLogic web-based application are displayed in the Contents panel.
- ▶ When you select the Excel Reports option, this panel displays the reports that were run during this session that are still open as an Excel spreadsheet.
- ▶ When the History List option is selected, this panel displays the contents of your History List in the CoreLogic web-based application (Note: Excel reports output through this plug-in are not included in your History List in the CoreLogic web-based application and will not be displayed here).
- ▶ When you select the Search Results option, the results of your last search are displayed.
- ▶ If you selected an option that accesses a function within the CoreLogic web-based application (e.g., Create Report), this panel will display the CoreLogic web-based application option that you have selected.

5 Description

This panel displays the description of the item selected from the Contents panel (if one is defined).

This panel is hidden by default upon installation and may be toggled to show/hide from the View menu.

Menu Options

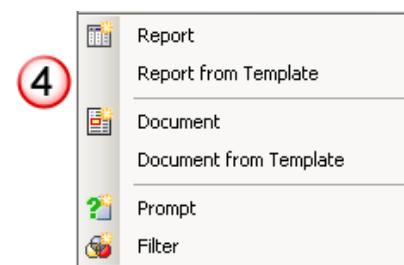
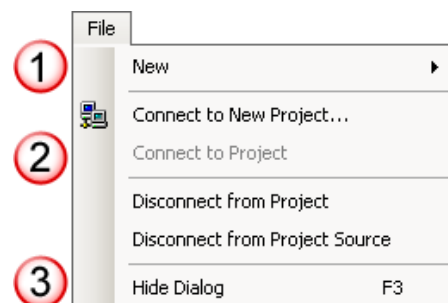
File Menu

The File menu provides access to the create options for reports, documents, prompts and filters as well as options to connect and disconnect from the CoreLogic web-based application web server and project. The following is an example of the File menu.

Additionally, the Hide Dialog option will hide the Main window of the plug-in. You may redisplay the window by clicking the CoreLogic Plug-In option from the Add-Ins menu in Excel.

The File menu provides access create new objects and work with project connections.

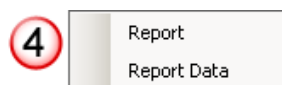
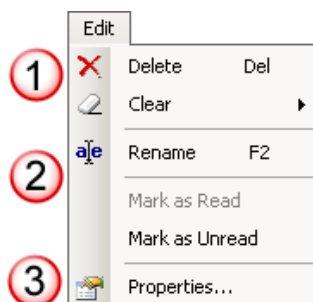
- 1 The New option allows you to add a new report, document, prompt or filter.
- 2 The project related options allow you to connect and disconnect from the web source or the project.
- 3 Hide Dialog option will hide the Main window of the plug-in. You may redisplay the window by clicking the CoreLogic Plug-In option from the Add-Ins menu in Excel.
- 4 The New option provides a submenu with options to create new report, document, prompt or filter objects.



Edit Menu

The Edit menu provides access to delete, clear and rename objects.

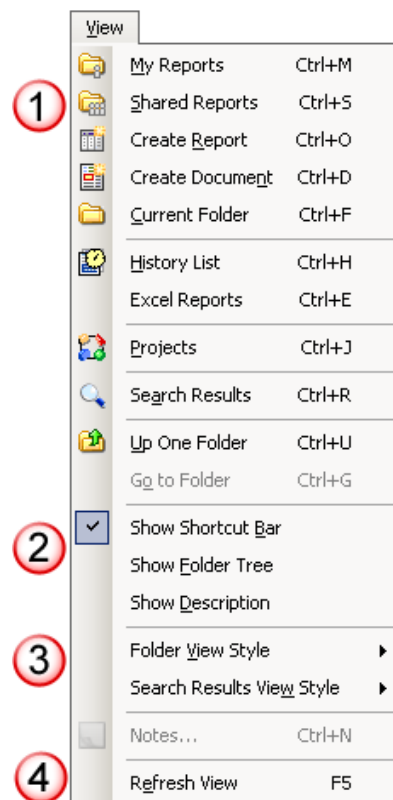
- 1 The Delete, Clear options apply when in the Excel Reports view and allow you to delete an item or clear the data or entire report layout.
- 2 The Rename, Mark as Read and Mark as Unread options are enabled when you have selected a report from the History List view.
- 3 The Properties option displays the properties of workbooks in Excel and includes the properties that link output in the plug-in to the reports in the CoreLogic web-based application on the web.
- 4 The Clear option provides a submenu with options to clear the entire Report (data and layout) or just the Report Data (leaving the row and column headers and any additional layout).
You can then use the Re-Execute or Refresh options to repopulate the cleared report and data.



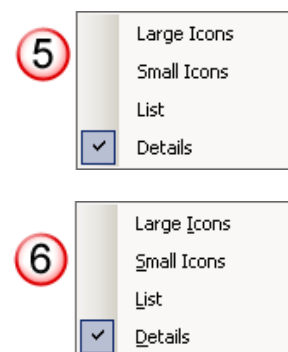
View Menu

The View menu controls the display of the main plug-in window.

- 1 The first set of options controls what is displayed in the Contents panel of the main plug-in window. It also includes options to navigate up one folder level from the current view or go to a specific folder (e.g., My Reports).
- 2 The second set of options controls the navigation options in the main plug-in window. These options allow you to toggle the navigation panels between hide/show for:
 - ▶ Shortcut Bar panel - the navigation ribbon that is presented when you access the plug-in main window.
 - ▶ Folder tree panel – a panel that shows the folder structure of the CoreLogic web-based application in a tree view.
 - ▶ Description panel – a panel at the bottom of the main plug-in window that displays the descriptions for reports from the CoreLogic web-based application web.
- 3 These options define the style of view for the folders and search results.
- 4 This option refreshes the view of the web application items in the plug-in (i.e., if you have updated report options in the web this option will refresh the view of those items in the plug-in).



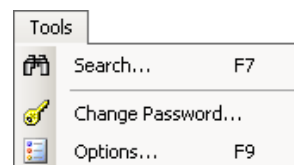
- 5 The Folder View Style option provides a submenu with the options to specify how the folders are displayed in the Contents panel.
- 6 The Search Results View Style option provides a submenu with the options to specify how the Search Results view is displayed in the Contents panel.



Tools Menu

The Tools menu provides access to search and Setup options.

- ▶ The Search option displays a dialog to specify the search criteria to locate an object in the CoreLogic web-based application.
- ▶ The Password option should not be used as your password is maintained by Client Services.
- ▶ Options displays general setup options for the plug-in as well as specific Excel related setup for the plug-in.



Reports Menu

The Run Report menu provides the options to request reports from the plug-in and also to edit report object design, refresh or rerun the report and specify options for when reports are run.

- ① The options to run reports allow you to specify how you want the output to be formatted and presented.

Refer to the Report Processing Options section for more detail on these options and how the output is presented.

- ② The Edit option allows you to access the Design Mode for the selected report object. This includes reports, documents, prompts and filter objects.

- ③ The Refresh, Re-Execute and Re-Prompt options allow you to update output in the plug-in after the initial report is run and output is generated.

Refer to the Processing Options for Existing Output section for more detail on these options and how they update existing plug-in report output.

- ④ Cancel History Item allows you to cancel an item that appears in the History List view. If the report is in the History List and is still processing, this option will cancel the processing and delete the History List item.

- ⑤ Go to Report Results option is enabled when you select a report worksheet from the Excel Reports view in the Contents panel. This will display the worksheet in the workbook you have selected.

- ⑥ Format Report Result option is toggled between checked and unchecked. When checked, the output generated through the plug-in will be formatted as specified in the report definition of the CoreLogic web-based application.

This is only applied when you select one of the Run Report options that use the formatting defined in the CoreLogic web-based application. Refer to the Report Processing Options section for more detail on these options and how the output is presented.

- ⑦ The Hide Dialog options will hide the main window of the plug-in when executing a report or when you select the Go To Report Result option.

You may redisplay the main window of the plug-in by clicking the CoreLogic Excel Plug-In option on the Excel Add-Ins menu.

Reports	
	Run Report F10
	Run Report to History List F11
	Run Report to Grid
	Run Report to Chart
	Run Report to Grid and Chart
	Run Report to Outline
	Run Report to PivotTable
	Run Report to PivotChart
	Run Report to PivotTable and PivotChart
	Run Report Flattened
	Run Report to Quick Grid
	Run Report to PDF
	Run Report to Custom Flash
	Run Document to View Mode
	Run Document to Flash Mode
	Edit
	Refresh Report
	Re-execute Report
	Re-prompt Report
	Cancel History Item
	Go To Report Result
	☒ Format Report Result
	Hide Dialog on Execute
	Hide Dialog on Go To Report Result

Workbook Menu

The Workbook menu provides options to refresh, re-run or clear the reports in the selected workbook. These options are enabled when you have a workbook displayed in Excel that contains data from reports run through the plug-in.

- ① The options to refresh, re-execute and re-prompt all reports allow you to update the existing output for all reports contained in a workbook.

Refer to the Processing Options for Existing Output section for more detail on these options and how they update existing plug-in report output.

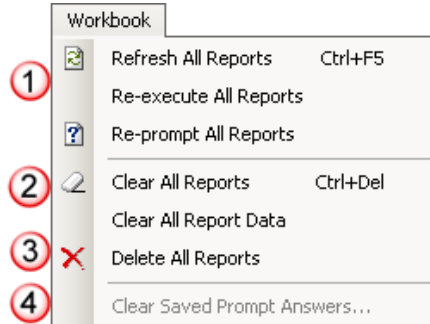
- ② The Clear options allow you to clear the entire report layout or just the data for all reports contained in a workbook.

Refer to the Processing Options for Existing Output section for more detail on these options and how they update existing plug-in report output.

- ③ The Delete All Reports allows you to delete all worksheets for all reports contained in a workbook. If you delete the reports, the worksheets will be removed and any links to the reports in the CoreLogic web-based application for the workbook are deleted.

- ④ Clear Saved Prompt Answers will be enabled if the workbook with focus has output that was generated through the plug-in and the report included prompts.

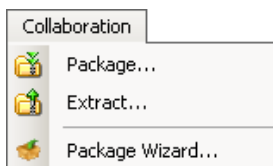
This will clear the prompt answers you used to generate the output.



Collaboration Menu

The Collaboration menu allows you to create a compressed zip file with selected output files or extract output files contained in a compressed zip file.

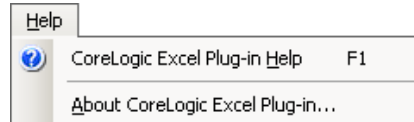
- ▶ The Package option will display a dialog to specify the files to add and the zip file name and location. You may one or more files to the list prior to initiating the packaging of the files into a zip file.
- ▶ The Extract option will display a dialog to specify one or more packaged zip files and the destination to place the files extracted from the zip file.
- ▶ The Package Wizard provides a step through process to specify if you wish to package or extract and then prompts you to specify the required file and location parameters.



Help Menu

The Help menu provides direct access to the online help for the CoreLogic Excel Plug-In.

- ▶ The CoreLogic Excel Plug-In Help will open the online help for your CoreLogic web application to the first topic related to the plug-in. This will include help for the web application as well.
- ▶ The About CoreLogic Excel Plug-In provides version, copyright and legal information on the plug-in.
- ▶ The Package Wizard provides a step through process to specify if you wish to package or extract and then prompts you to specify the required file and location parameters.



Toolbar Options

The toolbar provides icon buttons that are easily accessed at any time from the main plug-in window. Some icon buttons require a selection to be enabled (e.g., Run Report button is only enabled when you have selected a report from a list). Additionally, some icon buttons provide a drop down selection list (e.g., Run Report button provides a drop down list of run report formats).

The following is a list of the icon buttons available on the plug-in toolbar:

Icon	Name	Description
	Project	This icon button will display the Connect to Project dialog.
	My Reports	This icon button will display the My Reports folder from the web application in the Contents panel of the main plug-in window.
	Shared Reports	This icon button will display the Shared Reports folder from the web application in the Contents panel of the main plug-in window.
	Create Report	This icon button will display the Create Report option from the web application in the Contents panel of the main plug-in window. The icon provides a drop down list to select the Create Report option for a blank report or a list of the Report Template options.
	Create Document	This icon button will display the Create Document option from the web application in the Contents panel of the main plug-in window. The icon provides a drop down list to select the Create Document option for a blank document or a list of the Document Template options.
	Create Prompt	This icon button will display the Create Prompt option from the web application in the Contents panel of the main plug-in window.
	Create Filter	This icon button will display the Create Prompt option from the web application in the Contents panel of the main plug-in window.
	Edit Report	This icon button will display the Create Prompt option from the web application in the Contents panel of the main plug-in window. You must select an existing report from a list to enable this button.
	Run Report	This icon button will allow you to execute a report. You must select a report from a list to enable this button. If you simply click the button, the report will run as currently defined. This icon button will also provide a drop down list box to override the default report processing options (e.g., the layout and format for the output). Refer to the Report Processing Options section for more information on the options available for selection.
	Refresh Report	This icon button will refresh the data in the selected report. You must select a report option that has been run and is contained in the active workbook you have displayed to enable this button.
	Re-prompt Report	This icon button will re-execute and present the prompts for the selected report. You must select a report option that has been run and is contained in the active workbook you have displayed to enable this button.
	Navigate Up	This icon button will move the display in the Contents panel of the main plug-in window up one level within the current folder. The Contents panel must be displaying a subfolder to enable this button.
	Delete	This icon button will delete the selected object. You must select an object within the plug-in (e.g., workbook or worksheet) to enable this button.
	Search	This icon button will display the Search dialog box to search for an object.
	Help	This icon button will open the online help for the application and plug-in.

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Running a Report

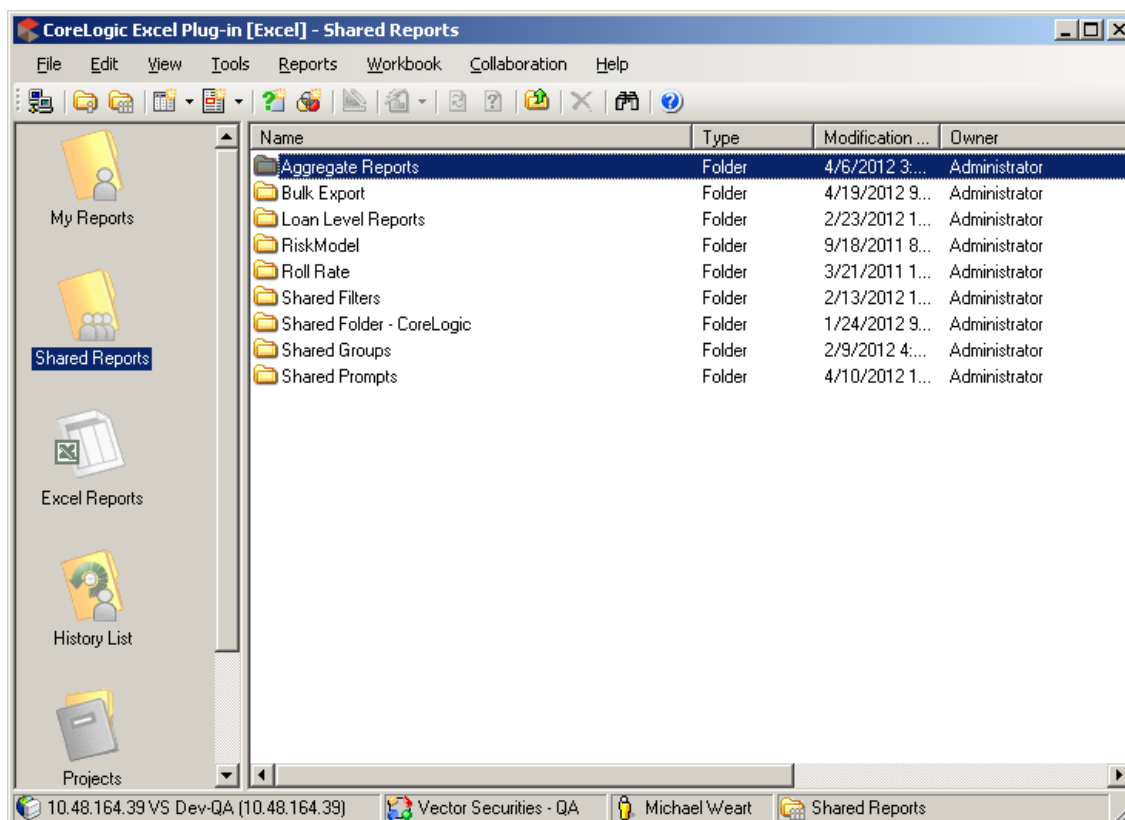
Shared Reports, My Reports and History List View

To run a report, you must first locate the reports you wish to run. Predefined application reports and your custom reports are available from the Shared Reports and My Reports folders from within the CoreLogic web-based application. Additionally, the History List view will display the reports that are currently in your History List in the CoreLogic web-based application

Note: Although the reports in your History List represent previously run output, access from the plug-in only allows you to refresh that output to an Excel workbook. A report must have been saved prior to running from the plug-in.

These reports may be displayed in the Excel Plug-In user interface by selecting either option from the Navigation Ribbon. When these are selected, the Contents panel displays the subfolders and report objects contained in each option.

The following is an example of the Shared Reports view within the plug-in.

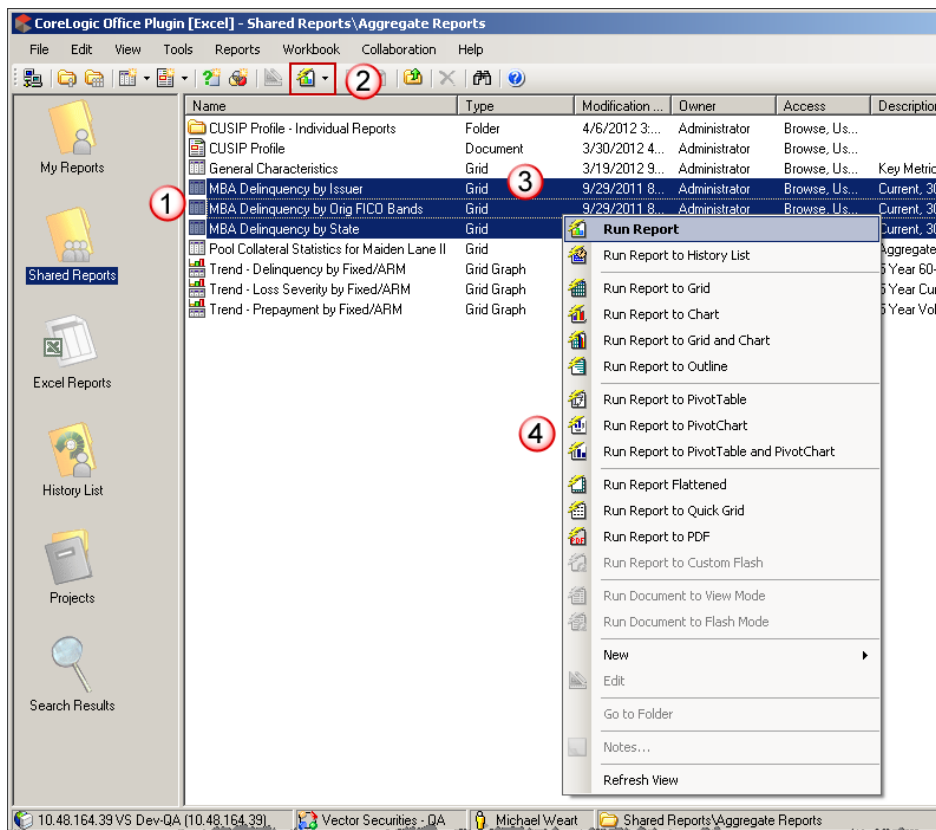


Selecting Reports

To run a report, locate the report in My Reports, Shared Reports or History List. You may run multiple reports at the same time; when requesting multiple reports the output will be placed in one Excel workbook file. How the output is formatted depends on the Processing Option you select when requesting the report(s) and where the output is placed in the workbook (i.e., are all reports on one worksheet within the workbook file or on separate worksheets) will depend on the settings defined in the Options setup for the plug-in. Refer to the Setup for Output Placement later in this document.

The following is an example of requesting multiple reports from the Shared Reports folder.

- 1 Select the reports you wish to run. To select multiple reports use the standard Windows multiple item select (i.e., SHIFT and click for consecutive items in a list or CTL and click to select non-consecutive items in a list).
- 2 Click the Run Report icon button on the toolbar to execute the reports using the default output processing option defined in the CoreLogic web-based application.
- 3 The Type for each report indicates the default output processing option for each report.
- 4 If you wish to override the default output processing option, right-click the selected reports to display the Output Processing Options menu and select an alternate output format. Refer to the next section for more information on each processing option and how the output is generated.



Report Processing Options

There are several options to specify the output formatting. Simply running the report will output as specified in the report definition from within the CoreLogic web-based application. Other options allow you to control the formatting of the output and are summarized below.

To output the report in another format, right-click the report and select a run option from the following:

Output Option	Description of Output Format
Run Report	Runs the report and displays the output to your session of Excel. The layout uses the format specified in the report definition in the CoreLogic web-based application. In addition to any report filtering prompts, you are also prompted to specify the Page By values to be included in the output (i.e., one, all or select Page By values).
Run to History List	This option bypasses the Excel output and runs the report in the CoreLogic web-based application to the History List. You will not be able to view the results from the Excel Plug-In. The layout uses the format specified in the report definition in the CoreLogic web-based application. In addition to any report filtering prompts, you are also prompted to specify the Page By values to be included in the output (i.e., one, all or select Page By values).
Run Report to Grid Run Report to Graph Run Report to Grid and Graph Run Report to Outline	These options run the report and display the output to your session of Excel. The layout uses the format specified in the CoreLogic web-based application specific to the option selected (i.e., these output format selections override the output format in the report definition). In addition to any report filtering prompts, you are also prompted to specify the Page By values to be included in the output (i.e., one, all or select Page By values).
Run Report to Pivot Table Run Report to Pivot Chart Run Report to Pivot Table and Pivot Chart	These options run the report and display the output to your session of Excel. The layout uses the format specified in Excel specific to the option selected (i.e., these output format selections override the output format in the report definition of the CoreLogic web-based application). You are not prompted for the Page By values to be included and only a Total page is output.
Run Report Flattened	This option runs the report and displays the output to your session of Excel. The layout uses the format specified in the report definition in the CoreLogic web-based application but combines all attributes as rows and all metrics as columns (i.e., any Page By attributes are moved to rows and all values are included in the output).
Run Report to Quick Grid	This option runs the report and displays the output to your session of Excel. The layout is presented as an unformatted Excel grid. The data is not presented by the Page By options, only one Total grid.
Run Report to PDF	This option runs the report and displays the output to your session of Excel. The layout format specified in the report definition in the CoreLogic web-based application. Page By values are reported as separate output within the PDF and as one overall total.

Prompted Report

Some reports include prompts to define parameters for the output. There are two types of prompts in the CoreLogic Excel Plug-In as follows:

- Report Prompts

These are the standard prompts as you would see in the CoreLogic web-based application and represent attribute, metric and/or filter prompts to specify what is included in the output.

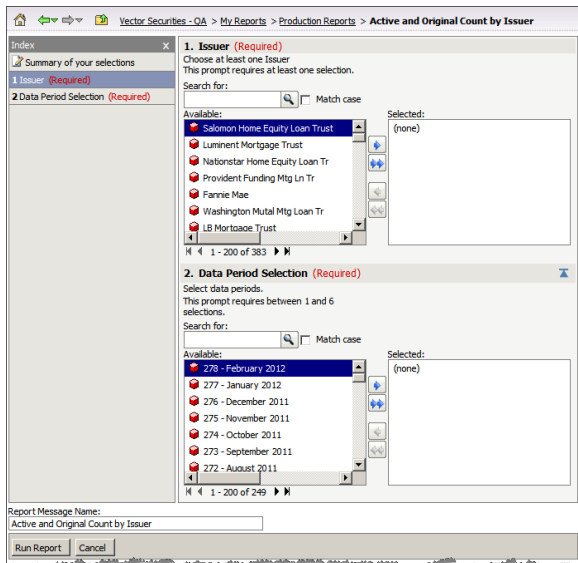
- Page By Prompts

These are prompts that are specific to the plug-in and are related to the Page By options in the report definition. This prompt allows you to specify the Page By values you wish to include in the output. In the CoreLogic web-based application, all Page By values are included in the output unless a regular Report Prompt filters out values.

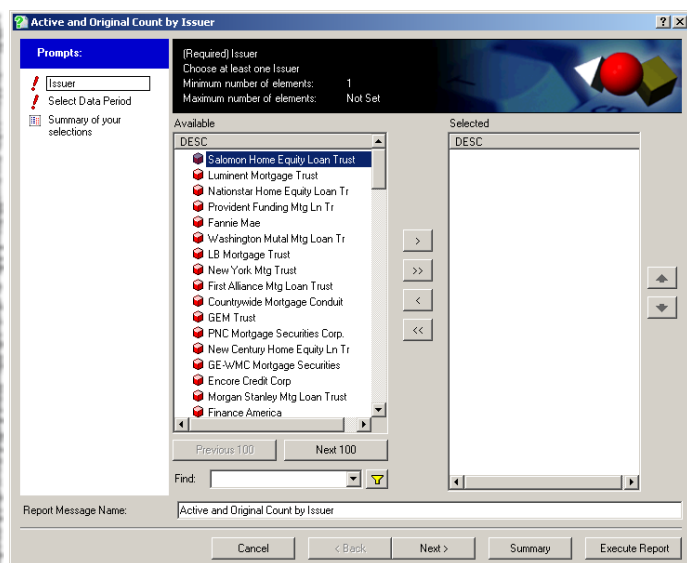
Report Prompts

The following is a comparison of the standard Report Prompts as they would appear when requesting a report from the CoreLogic web-based application and from the Excel plug-in. The interface is similar with a navigation panel to the left and the prompt details to the right. The primary difference is that the plug-in only displays one prompt at a time:

Report Prompt in Vector Securities Web



Report Prompt in Vector Securities through the Plug-In

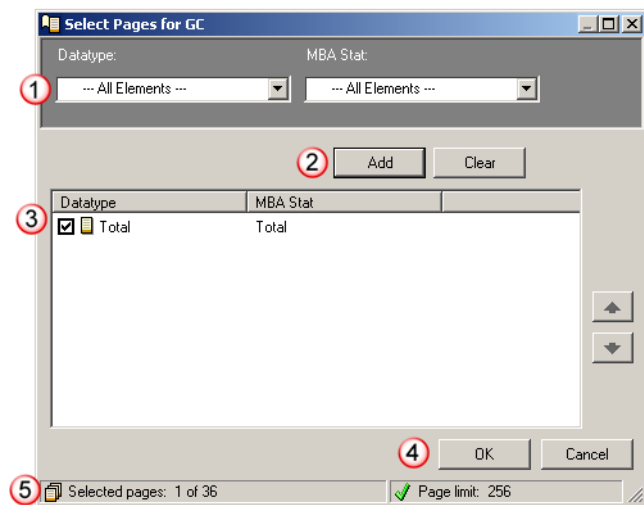


Page By Prompt

The Page By prompt in the plug-in allows you to specify which of the Page By values you wish to include in the output. You receive a prompt for each attribute that is included in the Page By option of the report definition. There is a separate prompt for each attribute and the prompt includes all values plus a Total option (which represents the aggregate total of all values for that attribute).

The following is an example of the Page By prompt for a custom report that includes the Data Type and MBA Stat attributes in the page-by setup on the report and includes the following elements.

- 1 The drop down list boxes provide the values for each attribute included in the Page By setup of the selected report.
- 2 The Add button will add each combination of attribute values to the Page By Selection list. The Clear button will clear all combinations in the Page By Selection list.
- 3 The Page By Selections will be refreshed to include each combination you have added.
The check box next to each combination will enable or disable the selection when the report is executed. Only those checked will be included in the output.
- 4 Once you have completed the setup for the Page By prompt, the OK button will continue with the next step in executing the report.
- 5 The Selected Pages notation will indicate the number of combinations you have selected along with the number of possible combinations.



In this example, the Page By prompt allows you to select any of the values for each attribute as well as a Total option. As you make selections and click the Add button, the combinations are added to the list for the report request.

When you select the values, they are matched up as a combination (e.g., the Alt-A data type and the Current MBA status). If you select the All Elements option for one or both, all values for the selected attribute are included. You may make as many selections and click the Add button. A combination of values can only occur once, any selections you make that result in a duplication of an existing combination are ignored.

The following is an example of the pairing with different selections. As noted previously, as you make selections and add to the setup, any previously paired values will not be duplicated:

Data Type Value Selection	MBA Status Value Selection	Resulting Page By Combination on Add	
		Data Type	MBA Status
All Elements	Current	Total	Current
		Alt A*	Current*
		BC	Current
		MBS	Current
Alt A	All Elements	Alt A	Total
		Alt A*	Current*
		Alt A	30 DQ
		Alt A	60 DQ
		Alt A	90 DQ
		Alt A	FCL
		Alt A	REO
		Alt A	PO
		Alt A	No Data

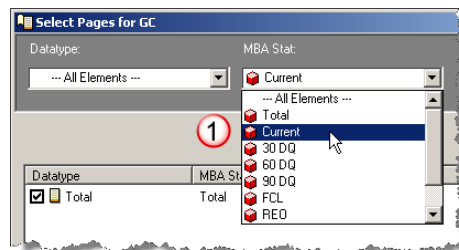
* Since the combination of Alt-A and Current were added with the first Add, this combination will not be duplicated on the second Add; but the other value combinations will be added.

To select items from the list, follow the steps below:

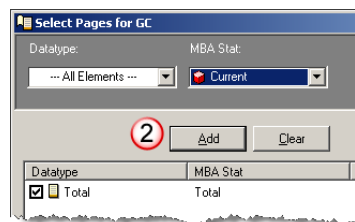
- 1 The drop down includes all values for the attribute along with a Total option. You may select each item individually, or select the All Elements option to add all values at one time.

By default, only the Total value for each attribute are selected for the output when first requesting the report.

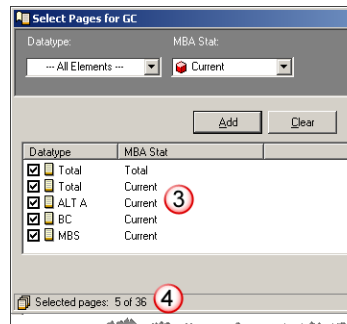
The All Elements option allows you to select all values and the Total option at one time.



- 2 Once you have selected the values of the Page By attribute you wish to include from the drop down, click the Add button to display the items in the list box below.



- 3 The list box is refreshed to display the selections you have added. These selections include a checkbox to toggle the list to include/omit the selected values when you run the report.



- 4 The Selected Pages notation now indicates the number of page value combinations you have selected along with the total number of possible page value combinations.

Report Execution Status Dialog

When one or more reports have been requested, the Report Execution Status dialog is presented. This lists each report that is being processed with a status icon and additional information that includes start and end time along with processing status bars.

Part of this dialog includes Fetch Details. Fetch refers to the action of retrieving data from the CoreLogic web-based application to be brought into your Excel spreadsheet through the plug-in. There are two types of fetch processing as follows:

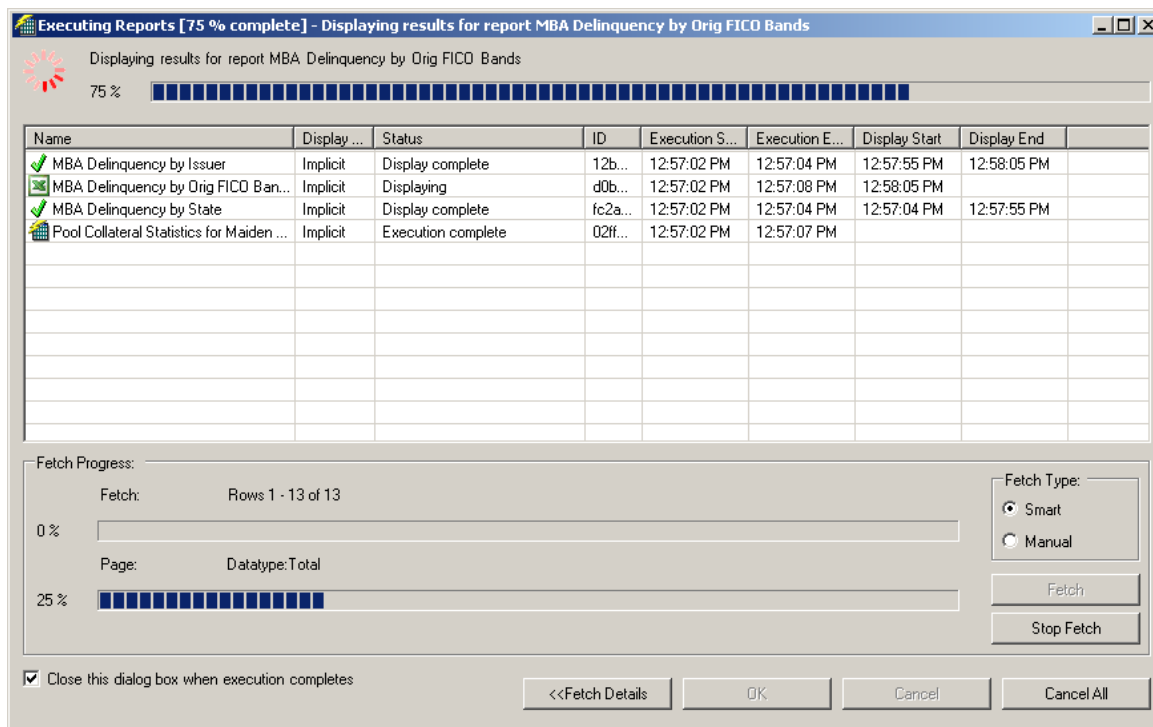
- Manual Fetch

The report processing pauses after each Page By fetch is completed. The dialog will indicate the incremental fetch is completed and wait for you to click OK to begin the next Page By fetch. This option is not recommended as it requires you to manually advance the report processing.

- Smart Fetch (Automatic)

The report processing automatically advances through each Page By fetch of data. The dialog will display the status of each Page By fetch but will not pause or require any action on your part to continue the report processing. This is the default selection for the plug-in setup.

The following is an example of the Report Execution Status dialog. In this example, four reports have been requested at one time (done by highlighting multiple report options and executing one of the Run Report options for all selected reports). When requesting multiple reports at one time, each report is output to a separate worksheet in the same Excel workbook file. This output formatting may be modified in the Options setup.



Name	Display...	Status	ID	Execution S...	Execution E...	Display Start	Display End
✓ MBA Delinquency by Issuer	Implicit	Display complete	12b...	12:57:02 PM	12:57:04 PM	12:57:55 PM	12:58:05 PM
✓ MBA Delinquency by Orig FICO Ban...	Implicit	Displaying	d0b...	12:57:02 PM	12:57:08 PM	12:58:05 PM	
✓ MBA Delinquency by State	Implicit	Display complete	fc2a...	12:57:02 PM	12:57:04 PM	12:57:04 PM	12:57:55 PM
Pool Collateral Statistics for Maiden ...	Implicit	Execution complete	02ff...	12:57:02 PM	12:57:07 PM		

Fetch Progress: 0 %

Page: Datatype: Total

25 %

Fetch Type:

☒ Smart

☐ Manual

Fetch

Stop Fetch

☒ Close this dialog box when execution completes

<<Fetch Details OK Cancel Cancel All

Output Worksheet Naming Conventions

When you run reports from the plug-in to one workbook, where the output is placed is determined by the Placement setup and the naming convention is determined by the Name setup in the Options configuration for the plug-in. You may modify these settings to customize the output placement and naming conventions. Refer to the Setup Options section for information on the selections for each of these setups.

The default setup upon initial installation is to place each report on its own worksheet. Additionally, when an individual report includes multiple Page-By values, the default setup upon initial installation is to place each “page” of output on its own worksheet. The result is that a report with four Page-By values will output to four worksheets within the workbook.

The naming convention of the worksheets in a workbook is as follows:

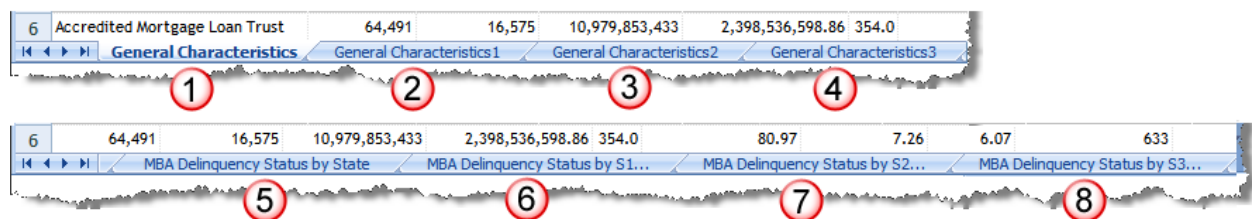
- The Excel limit for a worksheet name is 31 characters.
- The plug-in Name options are set to use the report name for the worksheet name.
- If the report outputs multiple Page-By worksheets, the plug-in Placement options are set to put each “page” on its own worksheet and each worksheet after the first are named with a sequential number appended to the report name.
- If the report name (including the sequential number) exceeds 31 characters, the report name is truncated by 3 characters plus the number of digits added to the name and the characters “...” are added to the end of the name.

The following is an example of the output generated to Excel from running two reports with five Page-By values each:

Report Name	Tab Number in Example	Page By Value	Worksheet Name
General Characteristics	①	Total	General Characteristics
	②	Alt-A	General Characteristics1
	③	BC	General Characteristics2
	④	MBS	General Characteristics3
MBA Delinquency Status by State	⑤	Total	MBA Delinquency Status by State
	⑥	Alt-A	MBA Delinquency Status by S1...
	⑦	BC	MBA Delinquency Status by S2...
	⑧	MBS	MBA Delinquency Status by S3...

The following is a visual representation of the output to the workbook:

Note: Tabs are stacked for demonstration purpose only.



Working with Existing Output

Once a report request has been completed, the output is placed on the active workbook in Excel. If there is no active workbook, a new workbook is created. If there is an active workbook, the output is added to the workbook that has focus. This will add the new output to the existing workbook; no existing data will be cleared or deleted.

You may work with the data in the workbook as you would with any Excel file, you may add worksheets and use the Excel options to manipulate data and reference data between worksheets. If you wish to work with the link between the output in the workbook and the CoreLogic web-based application, give that workbook focus and then:

- Select the Excel Reports option to display the Excel Reports view in the Contents panel
- Select a processing option for the existing output

Excel Reports View

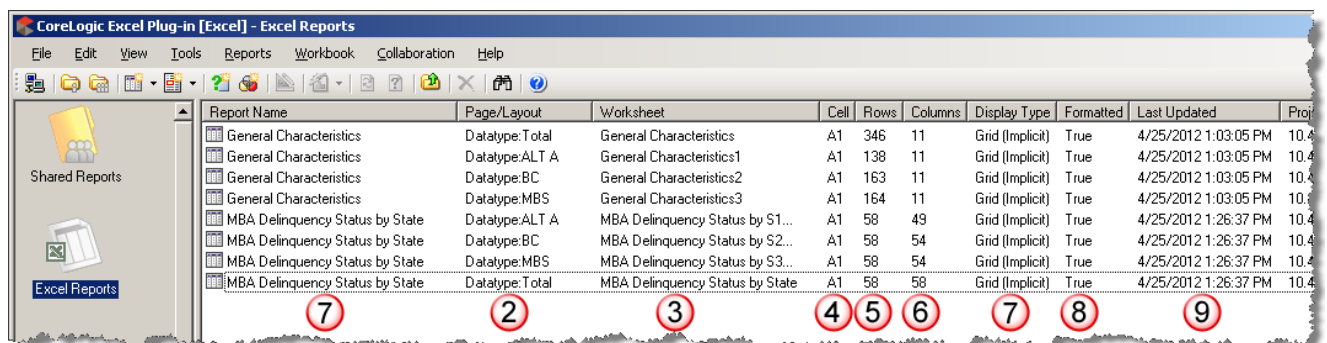
This view is displayed when you select the Excel Reports option from the Navigation Ribbon in the plug-in. It will only display the worksheets for the workbook that has focus in Excel. This view allows you to refresh, re-execute (with the same prompt answers) or re-prompt (to re-execute with different prompt answers) the output for the reports in the workbook. This also provides access to the Properties of each worksheet to allow you to re-establish the link to the CoreLogic web-based application if you need to rename the worksheets.

The information on this view includes the following:

- 1 Report Name in the CoreLogic web-based application
- 2 Page-By attribute name and value (per worksheet)
- 3 Worksheet name
- 4 Starting cell for the report and page-by value
- 5 Number of rows (including row/column headers and report information)
- 6 Number of columns
- 7 Layout type (i.e., grid, graph, pivot table, etc)
- 8 If the output was downloaded with formats or unformatted
- 9 Last update date and time

Note: The starting cell, number of rows and columns will assist you in locating the specific report and page output when multiple pages and reports are placed on the same worksheet.

The following is an example of the Excel Reports view displaying the output from a workbook.



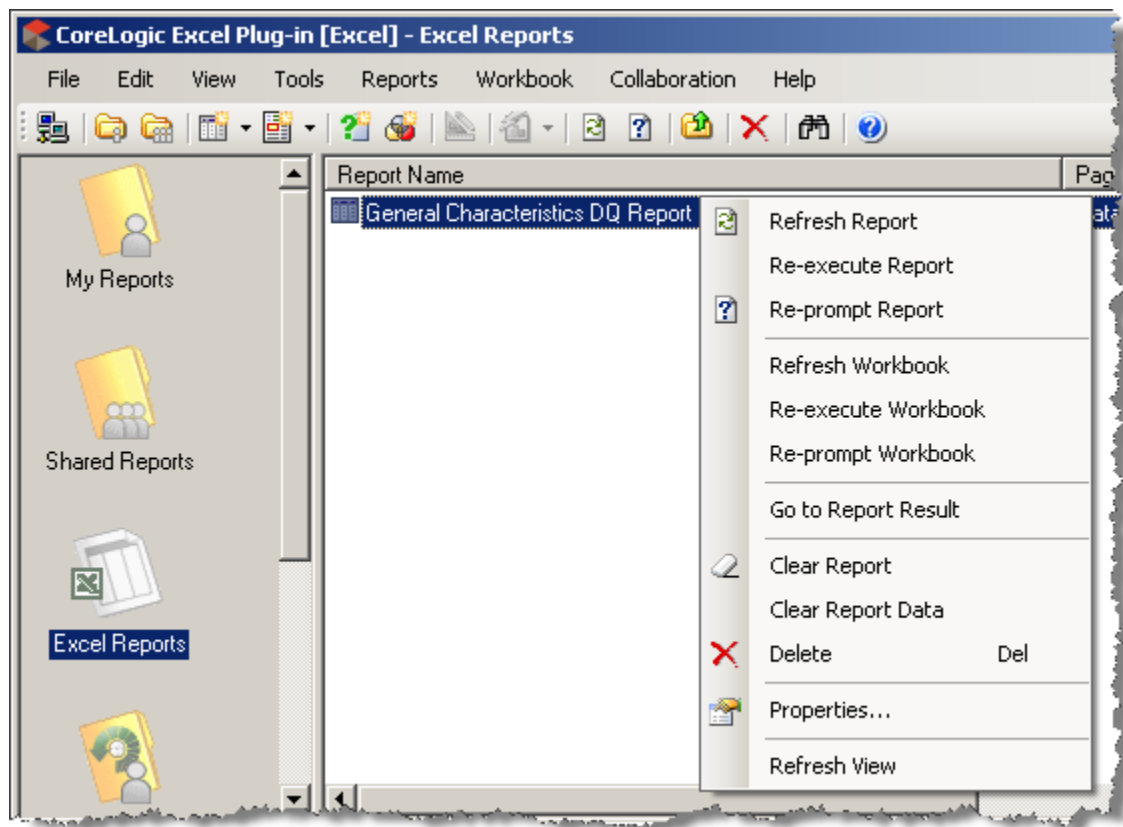
Report Name	Page/Layout	Worksheet	Cell	Rows	Columns	Display Type	Formatted	Last Updated	Print
General Characteristics	Datatype:Total	General Characteristics	A1	346	11	Grid (Implicit)	True	4/25/2012 1:03:05 PM	10.4
General Characteristics	Datatype:ALT A	General Characteristics1	A1	138	11	Grid (Implicit)	True	4/25/2012 1:03:05 PM	10.4
General Characteristics	Datatype:BC	General Characteristics2	A1	163	11	Grid (Implicit)	True	4/25/2012 1:03:05 PM	10.4
General Characteristics	Datatype:MBS	General Characteristics3	A1	164	11	Grid (Implicit)	True	4/25/2012 1:03:05 PM	10.4
MBA Delinquency Status by State	Datatype:ALT A	MBA Delinquency Status by S1...	A1	58	49	Grid (Implicit)	True	4/25/2012 1:26:37 PM	10.4
MBA Delinquency Status by State	Datatype:BC	MBA Delinquency Status by S2...	A1	58	54	Grid (Implicit)	True	4/25/2012 1:26:37 PM	10.4
MBA Delinquency Status by State	Datatype:MBS	MBA Delinquency Status by S3...	A1	58	54	Grid (Implicit)	True	4/25/2012 1:26:37 PM	10.4
MBA Delinquency Status by State	Datatype:Total	MBA Delinquency Status by State	A1	58	58	Grid (Implicit)	True	4/25/2012 1:26:37 PM	10.4

Processing Options for Existing Output

Once you have generated a report and the output is written to an Excel workbook, you may work with the data in the workbook as needed. When you have selected the Excel Reports view, there are options to clear, refresh and re-execute the reports contained in the selected workbook.

Note: The refresh vs. re-execute is related to the cached output stored on the web server. When you run a report from the CoreLogic web-based application or the Excel Plug-In, an image of the output is stored in a cache on the web server. This cached output is specific to that instance of the report request and the parameters used to generate output (i.e., report and/or page-by prompt parameters).

The following is a list of the options to work with the output in a report or all reports in the workbook:



- Refresh Report

This option reloads the previously run output from the cached output within the CoreLogic web-based application for that individual report. Since this option does not re-execute the report, no prompts will be presented. If a report has multiple worksheets, all

- Re-Execute Report

This option will re-execute that individual report with the report and page-by prompt answers you specified the last time the report was executed from the plug-in. This option will clear the cached output within the CoreLogic web-based application prior to running the individual report.

- **Re-Prompt Report**

This option will re-execute that individual report and present all report and/or page-by prompts required by the report definition. This option will clear the cached output within the CoreLogic web-based application prior to running the individual report.

- **Refresh Workbook**

This option reloads the previously run output from the cached output within the CoreLogic web-based application for all reports contained in the selected workbook. Since this option does not re-execute the report, no prompts will be presented.

- **Re-Execute Workbook**

This option will re-execute all reports contained in the selected workbook with the report and page-by prompt answers you specified the last time the reports were executed from the plug-in. This option will clear the cached output within the CoreLogic web-based application prior to running each report.

- **Re-Prompt Workbook**

This option will re-execute all reports contained in the selected workbook and present all report and/or page-by prompts required by each report definition. This option will clear the cached output within the CoreLogic web-based application prior to running each report.

- **Clear Report**

This option clears the entire contents of all worksheets related to the selected report from the list in the Excel Reports view. The worksheets will remain in the workbook and will retain the link to the CoreLogic web-based application to allow you to refresh or re-execute the report and retrieve the output.

- **Clear Report Data**

This option clears only the metric data of all worksheets related to the selected report from the list in the Excel Reports view. The worksheets will remain in the workbook and will retain the link to the CoreLogic web-based application to allow you to refresh or re-execute the related report and retrieve the output.

- **Delete**

This option deletes the contents of the worksheets selected from the list in the Excel Reports view. The worksheets will remain in the workbook but the link to the CoreLogic web-based application will be cleared and these worksheets will not be included when you refresh or re-execute the related report or workbook.

- **Properties**

This option allows you to open the Properties dialog for the selected worksheet. Most of this information should not be modified, but the Worksheet property is used to link the individual worksheet to the report in the CoreLogic web-based application. This property must be the same as the name on the worksheet in the Excel workbook.

Steps to Manually Rename Output Worksheets

Whichever option you have selected to assign the name to a worksheet, you may still manually rename the worksheets within an Excel workbook to suit your business requirements. If you choose to rename the worksheets, you must update the worksheet name in the Properties for the worksheet if you wish to utilize the Refresh or Rerun options in the plug-in.

The connection between a worksheet and the CoreLogic web-based application is defined by the worksheet name within the Properties. If you manually change the worksheet name on the tab, you must also change the worksheet name in the Properties.

To do this, follow the steps below after the output has been created:

- The customized report is named General Characteristics DQ Report.
- The Location setup will create one worksheet for each “page” of output.
- The Name setup uses the report name with a sequential number appended for each worksheet after the first one created.
- The Page By setup produces 5 pages of output (4 attribute values and the overall Total).
- Once the output is generated, the Excel workbook will have 5 worksheets named as follows:

General Characteristics DQ R...

General Characteristics DQ 1...

General Characteristics DQ 2...

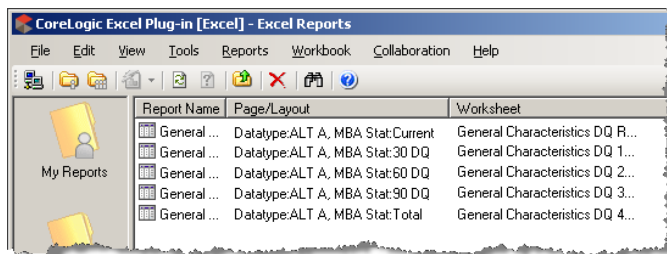
General Characteristics DQ 3...

General Characteristics DQ 4...

- 1 The view to the right is the Excel workbook with the worksheets.



- 2 The view to the right is the list of output worksheets from the Excel Report view in the plug-in.

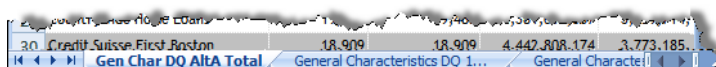


- 3 Use the standard rename processing in Excel to rename the first worksheet

From:

To:

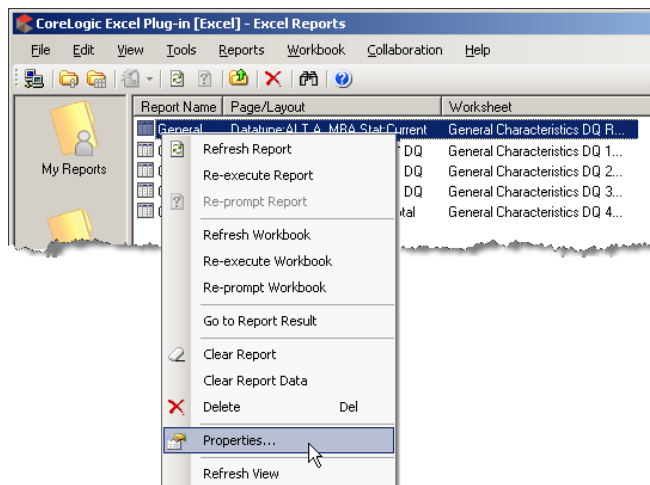
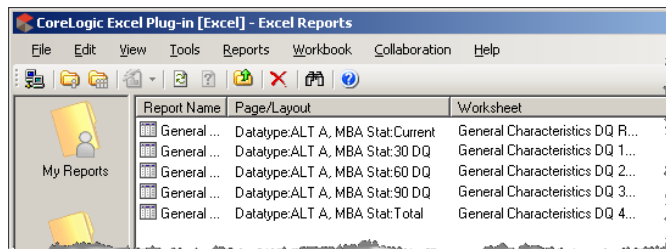
Gen Char DQ AltA Total



- 4 Notice the name in the Worksheet column from the Excel Report view in the plug-in has not changed.

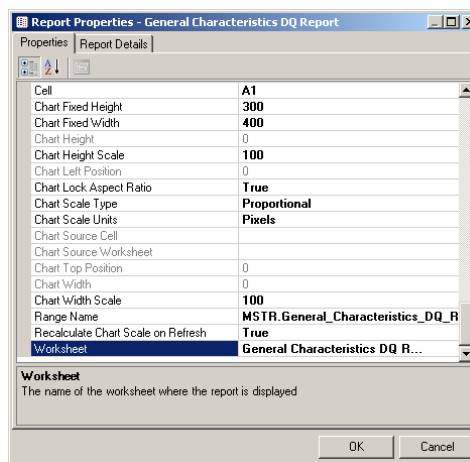
If you attempt to refresh the report data, the plug-in will not be able to link this output with the CoreLogic web-based application report as the names are not in sync.

- 5 From the Excel Reports view in the plug-in, right-click the worksheet you have just renamed in Excel and select the Properties option.



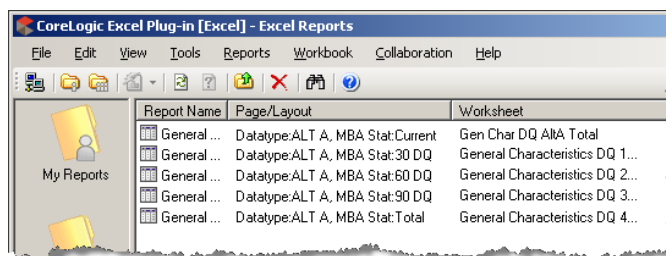
- 6 The Properties dialog is presented. Navigate to the Worksheet property and manually change the worksheet name to match the name on the Excel workbook.

Once you have modified the Worksheet property click the OK button.



- 7 When the Properties dialog is closed, the Excel Report view is refreshed to reflect the change in the Worksheet name property.

The worksheet in Excel is now in sync with the Worksheet property linked to the CoreLogic web-based application and you may now refresh the report output.



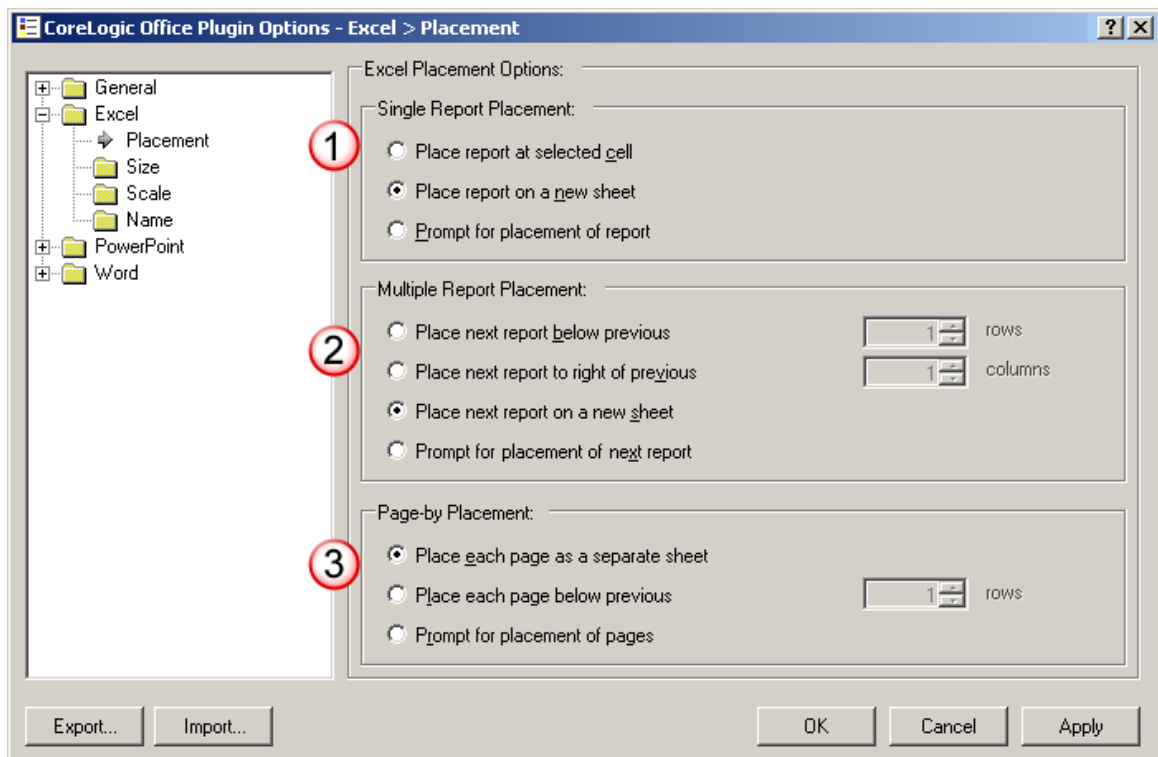
Setup Options for Excel

Output Placement in Excel

The CoreLogic Excel Plug-In is designed to allow you to request reports and output to Excel. As noted in the prior section, the format of the output is determined by the report option selected (e.g., using the default layout in the report definition from the CoreLogic web-based application or selecting an option from the Report Request Option right-click menu). The placement of output is defined within the Options setup for the Excel plug-in. Placement refers to where the output is placed within the Excel workbook.

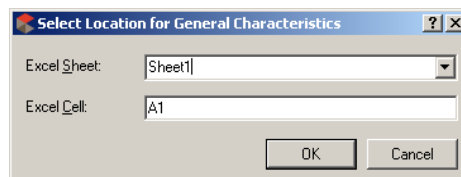
First a note about the Excel workbook file used for the output; if a workbook file is opened and has focus, the report output is added to that file based on the placement options. If a file is not opened or does not have focus, a new file is created and the report output is added to that new workbook file based on the placement options.

The default setup upon installing the plug-in adds report output to an Excel workbook as a new worksheet and the Page-By detail is also added as a new worksheet. This default placement setup may be modified via the Placement options for Excel in the plug-in setup. The following is an example of the Placement options for the plug-in:

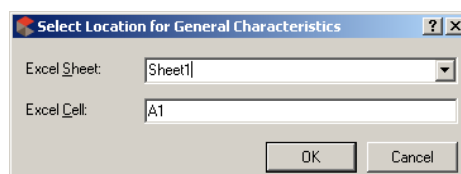


The following is an explanation of the Placement options for the Excel plug-in:

- ① When running a single report, this setting allows you to specify where the report is placed in the Excel workbook file. The following options are available:
 - ▶ Place report at selected cell
This option places the output in the selected worksheet of the workbook file starting at the cell that has focus.
 - ▶ Place report on a new sheet
This option places the output in a new worksheet of the workbook file.
 - ▶ Prompt for placement of report
This option allows you to specify where to place the output. Once the report output has been generated, a dialog window is presented for you to specify the spreadsheet and the cell location for the output. The following is an example of the dialog:

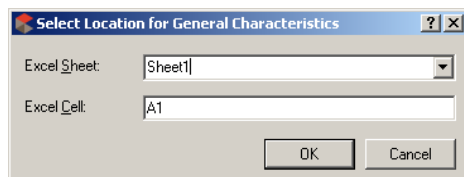


- ② When running multiple reports at one time, the first report uses the Single Report option to determine placement. The remaining reports use this option to determine where the output is placed in the Excel workbook. The following options are available:
 - ▶ Place next report below previous (specify a number of separation rows)
This option places the output for each of the next reports on the same worksheet and below the prior report. You specify the number of blank rows to separate the report output.
 - ▶ Place next report to the right of previous (specify a number of separation rows)
This option places the output for each of the next reports on the same worksheet and to the right of the prior report. You specify the number of blank columns to separate the report output.
 - ▶ Place next report on a new sheet
This option places the next report on its own worksheet within the Excel workbook.
Note: If there are page-by attributes defined, the Page-By placement determines if additional worksheets are created for each page-by value combination.
 - ▶ Prompt for placement of next report
This option allows you to specify where the next report is to be placed. Once the report output has been generated, a dialog window is presented for you to specify the spreadsheet and the cell location for the output of the next report. The following is an example of the dialog:



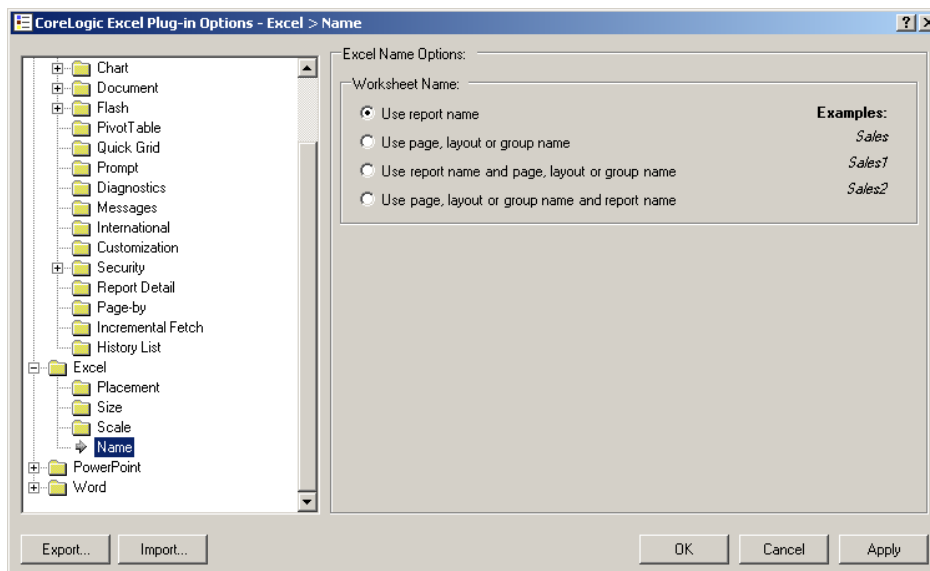
③ When running a report that includes Page-By attributes, a separate “page” of output is created for each combination of Page-By attribute values. This setting allows you to specify where the individual pages are placed. The following options are available:

- ▶ Place each page as a separate sheet
This option places each output “page” on its own worksheet within the Excel workbook.
- ▶ Place each page below previous (specify a number of separation rows)
This option places the output for each of the output “pages” on the same worksheet and below the prior “page”. You specify the number of blank rows to separate the report output.
- ▶ Prompt for placement of pages
This option allows you to specify where the next output is placed. As the report output is generated for a “page”, a dialog window is presented for you to specify the spreadsheet and the cell location for the output of the next “page”. The following is an example of the dialog:



Name Setup in Options

When output is updated to the Excel workbook, the location of the output is defined by the Placement settings for Excel in the Options setup from the Tools menu. The Name settings for Excel determine the naming convention of the worksheets created when running reports through the plug-in. The following is an example of the Excel Name options for the plug-in:



By default, the naming convention uses the report name from the CoreLogic web-based application. If multiple worksheets are created, the first worksheet uses the report name and subsequent worksheets append a sequential number to the report name (e.g., DQ Report for first worksheet name, DQ Report1 for second worksheet, DQ Report2 for third worksheet, etc).

The Excel Name setup within Options allows you to modify this default setup and use a combination of the report name, page name, layout name and/or custom group name. One consideration when setting this option, the limitation within Excel for the length of a worksheet name is 31 characters. And the Excel plug-in adds three continuation periods (i.e., "...") when truncating a report name. This will also factor into the number of characters that are truncated. Since many of the report names in the CoreLogic web-based application come close to the 31 character limit, including the page, custom group or layout values will exceed the limit.

The following are the options you have to define the Name of the worksheets:

Name Option	Description
Use report name	This option is selected by default upon installation. The name of the report is updated to the first worksheet that is generated. Any subsequent worksheets created from the same report in the Excel workbook will use the report name and add a sequential number. If the report name exceeds the maximum allowed characters, the name is truncated to 31 characters for the first worksheet. Any subsequent worksheets will truncate the report name further to accommodate for the additional sequential numbering.

Name Option	Description
Use page, layout or group name	The name of the page by (compound of there are multiple page by attributes), layout or custom group value is updated to the first worksheet. Any subsequent worksheets created from the same report in the Excel workbook will use the same combination and add a sequential number. If the page by, layout or custom group value exceeds the maximum allowed characters, the name is truncated to 31 characters for the first worksheet. Any subsequent worksheets will truncate the value further to accommodate for the additional sequential numbering.
Use report name and page, layout or group name	The name of the report followed by the page by (compound of there are multiple page by attributes), layout or custom group value is updated to the first worksheet. Any subsequent worksheets created from the same report in the Excel workbook will use the same report name and page by/layout/custom group combination and add a sequential number. If the report name with the page by, layout or custom group value exceeds the maximum allowed characters, the name is truncated to 31 characters for the first worksheet. Any subsequent worksheets will truncate the value further to accommodate for the additional sequential numbering.
Use report name and page, layout or group name	The page by (compound of there are multiple page by attributes), layout or custom group value followed by the report name is updated to the first worksheet. Any subsequent worksheets created from the same report in the Excel workbook will use the same page by/layout/custom group and report name combination and add a sequential number. If the page by, layout or custom group value with the report name exceeds the maximum allowed characters, the name is truncated to 31 characters for the first worksheet. Any subsequent worksheets will truncate the value further to accommodate for the additional sequential numbering.