

# Lender Self-Service Reporting

Summary: Lender Self-Service Reporting provides Lenders the ability to create their own reports - that have been set up. The report templates include information on Deals, Properties, Pre-Review and/or Waivers, Deal Participants, and Loan Options

### Navigating through Self-Service Reporting:

• Once Logging in Fannie Mae DUS Gateway, on the Reports tab

🛞 Fannie Mae'   DUS Gateway'	Home Deal List	Reports	Cases	Useful Links 🗸
	Welcome			
	My Deals 🔻 🖡			

• On the left side, select All Folders

Sannie Mae'   DUS Gateway	Home D	eal List
	Reports All Folders 6 items	5
	REPORTS Recent	
	Created by	4e
	Private Rep All Reports	orts
9	FOLDERS	
Provide Feedback	All Folders	
edback	Created by I Shared with	
	FAVORITES	inc.
	All Favorites	

• Search and select Self Service Reporting Report Folder

Reports All Folders 1 item				[	Q self service re
REPORTS	Name	Created By	Created On 🗸	Last Modified By	Last Modified Date 🗸 🗸
Recent	Self Service Reports	Ramana Pavan Dronamraju	4/18/2023, 4:55 PM	Ramana Pavan Dronamraju	4/18/2023, 4:57 PM
Created by Me					

- Once you have selected the folder, you will have five different report template options
  - o Deal Reports
  - Deals with Deal Participants Report
  - Loan Options and Deals Report
  - Waivers and Deals Report
  - Properties with Deals Report

Reports All Folders > Se 5 items	elf Service Reports						Q, Sea	rch all folders
REPORTS	Name	Description	$\sim$	Folder	Created By	Created On	$\sim$	Subscribed
Recent	Deals Report			Self Service Reports	Ramana Pavan Dronamraju	4/18/2023, 5:02 PM		
Created by Me Private Reports	Deals with Deal Participants R			Self Service Reports	Ramana Pavan Dronamraju	4/19/2023, 10:17 AM		
All Reports	Loan Options with Deal Repor			Self Service Reports	Ramana Pavan Dronamraju	4/19/2023, 10:21 AM		
FOLDERS	Waivers with Deals Report			Self Service Reports	Ramana Pavan Dronamraju	4/19/2023, 10:24 AM		
All Folders	Properties with Deals Report			Self Service Reports	Ramana Pavan Dronamraju	4/19/2023, 10:31 AM		

## **Creating Your Own Report Based Off the Templates:**

- Navigate into one of the Report Templates
- Once in Report, click on the drop down 🚺 and select **Save As**

🛞 Fannie Mae'   DUS Gateway'	Home	Deal List	Reports	Cases	Useful	Links 🗸						م	
	6	Report: Deals Deals Report							Enable Field Editing	٩	🗞 Add Chart 🛛 🔻 🖸	Edit	•
	Total R 43	ecords										Save A	
	De	al Name		V	Deal ID 💌	Account Name	•	Submission Type	Lender Contact		Deal Amount		

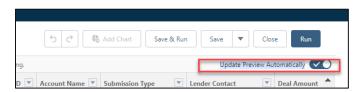
• Create a copy of your report, give it a **Report Name**, and place it a **Folder** of Preference by clicking on **Select Folder** 

	Save Report As	
* Report Name Copy of Deals Report		
FA/ Report Unique Name 1		
Copy_of_Deals_Report_XoF		
3 Ri IFAL Report Description		
01		ĥ
Folder		
Self Service Reports		Select Folder
114		Cancel Save

• Once a copy has been creating, click on **Edit** to adjust your personal Report

Home	Deal List	Reports	Cases	Useful Links 🗸		۹
	eport: Deals Copy of Deals	Report			Enable Field Editing     Q     Add Chart     Y	C <sup>4</sup> Edit 💌
Total Rec	ords					

Rule of Thumb: Check Update Preview Automatically



#### • To Add More Fields:

• Underneath the **Outline** tab, go to the **Column** section and search and select fields you would like to add to your report

🛞 Fannie Mae'   DUS Gateway'	Home	Deal List	Reports		Cases	Useful Links 🗸		
	REPORT Copy o	▼ of Deals Report ✔	Deals					
	> ≡ 0	utline 🍸 F	ilters 🕕	🕑 Pr	reviewing a limite	ed number of records. Run the rep	ort to see (	everything.
	이 아이				Deal Name		-	Deal ID 💌
		SROUP ROWS		1	Test Shakeout (	Deal 1/09/23		169792
	A	dd group	Q	2	Production Sha	keout MFAAA Cloud 2023-02-02 2	1:37:32	204169
		5/1		3	Delegated AP (	S&D Test		204594
				4	Shakeout Deal	02_16_23 Refactor AssignPricingLe	ad	206529
	Colu	imns	•	5	Production Sha	keout MFAAA Cloud 2023-02-16 2	1:50:43	206554
<b>5</b>		an	Q	6	Shakeout 6307	1		208460
rová				7	shakeout 5886	0 portfolio test		208464
- Faard	OP	PORTUNITY INFORMATIC	N .		1			208465
hank		timated <b>Loan</b> Closin	-		nju Deal (to	ggle off)		208508
	Es	timated <b>Loan</b> Closin	g Date (2)		Shakeout 3	16		208964
		AL: CUSTOM INFO			keout MFT4	SORL-59818 - Standalone		210305
		hapter 9 Small Loans			keout Deal	02_16_23 Loop Consolidation		206524
		risting Fannie Mae Lo	an Number		2			208468
		risting <b>Loan</b> Holder			Shakeout 3	3/30		211220
		van Fulbose		15	Production Sha	keput MEAAA Cloud 2023-01-19 2	2-28-20	202857

### • Group by a Field

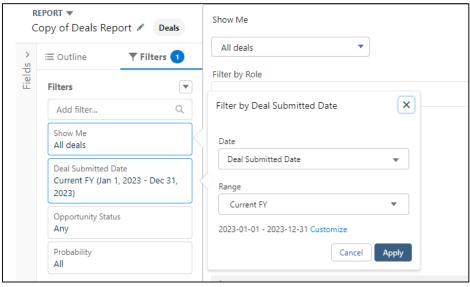
• Underneath the **Outline** tab, go to the **Groups** section and search and select field you would like to group by

🛞 Fannie Mae'   DUS Gateway'	Home	Deal List	Reports		Cases	Useful Links 🗸	
		PORT ▼ py of Deals Report 〃 D	eals				
	>	<b>≡ Outline T</b> Filters	0	🕑 Pr	reviewing a limited nu	umber of records. Run the report to se	e everything.
	Fields	Groups			Deal Name		Deal ID
	-			6	Shakeout 63071		208460
		loan pu	٩	7	Shakeout 58860 por	rtfolio test	208464
				0	test 1		208465
		DEAL: CUSTOM INFO			Manju Deal (toggle	off)	208508
		Loan Purpose			AP Shakeout 3 16		208964
				11	Shakeout MFTASOR	L-59818 - Standalone	210305

- Adjusting Filters
  - o Go to the Filter Tab

	EPORT 👻	ort 🖋 Deals
s s	≔ Outline	<b>T</b> Filters
Fields	Filters	•
	Add filter	Q

• By default, you have the four filters below, that can be adjusted by clicking into the filter and selecting the appropriate value



- Adding a New Filter:
  - o Underneath the Filters tab, search and select field you would like to add a filter on

	REPORT  Copy of Deals Report  Deals									
>	≡ Outline <b>▼Filters</b>	All deal								
Fields		Filter by R								
Ξ	Filters	Search I								
	dea Q									
	DEAL: CUSTOM INFO									
	Deal Competitor	-								
	Deal ID									
	Deal Lost Due to IO									
	Deal Lost Due to Other Reason									
	Deal Lost Due to Pricing									
	Deal Lost Due to Proceeds									
	Deal Lost To	-								
		4								



• The **operato**r can be adjusted, type or select the appropriate value for the filter and click **Apply** 

Show Me	C2 Delected AB C®D Text	
All deals	Filter by Deal Status	×
Deal Submitted Date		
Current FY (Jan 1, 2023 - Dec 31,	Operator	
2023)		
Opportunity Status	equals 🔻	
Any	Value	
Probability		
All	P.	_
0-		
Deal Status	All	
	Pre-Registered	
	Registered	
	Submitted	
	In Review	Ŧ
	Locked D Cancel Apply	1
	18 Production Shakeout MFAAA Cloud AP 2023-02	2-(

- Once Adjustments have been made, click on Save or Save and Run
  - **Save:** Changes to report will be saved, you will remain on the Edit Report Screen
  - Save and Run: Changes to report will be saved and you will be taken to the final report view

	REPORT ▼ Copy of Deals Report ✔ Deals				Save & Run Save V Close Run				
>	$\equiv$ Outline	<b>T</b> Filters <b>1</b>	Previewing a limited number of records. Run the report to see everything.     Update Preview Auton						utomatically 🔽
Field	Filters			Deal Name	Deal ID 💌	Account Name 💌	Submission Type	Lender Contact	Deal Amount
			1	Test Shakeout Deal 1/09/23	169792	PennyMac Corp.	Pre-Review	Shakeout Login Based User2	\$0
	Add filter	ά	2	Production Shakeout MFAAA Cloud 2023-02-02 21:37:32	204169	PennyMac Corp.	Pre-Review	Shakeout API User	\$0

For any questions or additional help, please submit a case to DUS Gateway Support or email dusgateway\_support@fanniemae.com