



## Creating and Viewing Reports

*In this chapter we will look at the different types of reports that can be created, and how to view them.*

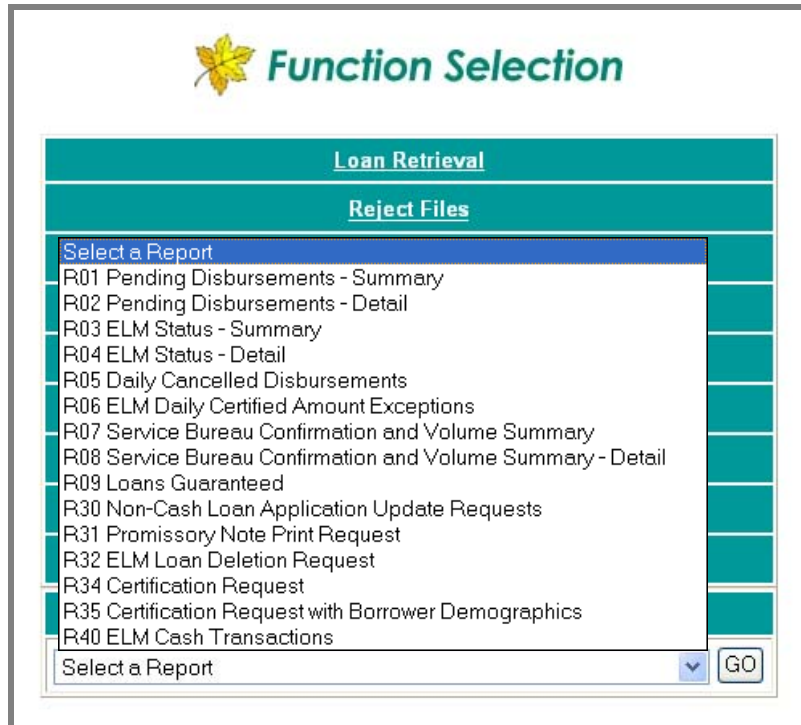
**E**LMWeb allows you to create and view a variety of reports. These reports can be used to better manage loans and disbursements, resolve errors, and track volume. The data from the reports can be printed or exported to Microsoft Excel. Some ELMNet reports can be created on demand, and some can be scheduled for delivery to your mailbox.

### Using Report Selection

To create a report:

1. From the **Function Selection** menu, select the type of report to create by clicking on the drop-down arrow for the **Report Selection** drop-down list.

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The screenshot shows a web interface titled "Function Selection" with a yellow leaf icon. Below the title are two teal-colored buttons: "Loan Retrieval" and "Reject Files". The "Reject Files" button is active, displaying a list of reports. The list is titled "Select a Report" and includes the following items:

- R01 Pending Disbursements - Summary
- R02 Pending Disbursements - Detail
- R03 ELM Status - Summary
- R04 ELM Status - Detail
- R05 Daily Cancelled Disbursements
- R06 ELM Daily Certified Amount Exceptions
- R07 Service Bureau Confirmation and Volume Summary
- R08 Service Bureau Confirmation and Volume Summary - Detail
- R09 Loans Guaranteed
- R30 Non-Cash Loan Application Update Requests
- R31 Promissory Note Print Request
- R32 ELM Loan Deletion Request
- R34 Certification Request
- R35 Certification Request with Borrower Demographics
- R40 ELM Cash Transactions

At the bottom of the list is a search box containing "Select a Report" and a "GO" button.

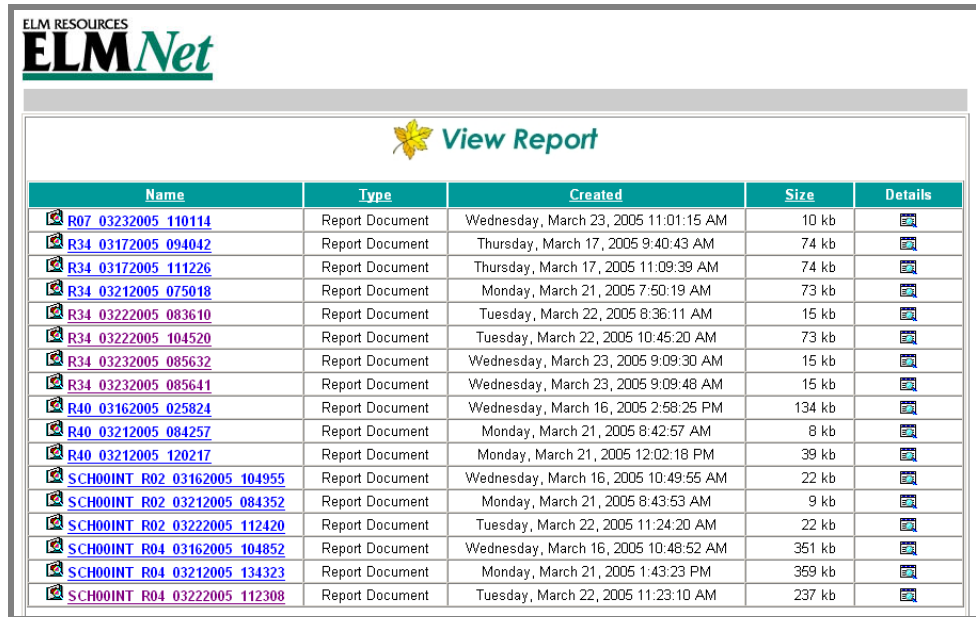
2. Highlight the report you wish to create.
3. Click on the **Go** button.
4. Specify the criteria for the report.
5. Click on the **Generate Report** button at the bottom of the page.
6. You will receive a message when the report is successfully generated.

## Viewing Reports

To view a report you have created using **Report Selection**:

1. From the **Function Selection** menu, click on **View Reports**.
2. You will be asked to enter your user name and password, as you log in to the Actuate Report Viewer. This is the same user name and password that you used to log in to ELMWeb.
3. Click **OK**.

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Name	Type	Created	Size	Details
<a href="#">R07 03232005 110114</a>	Report Document	Wednesday, March 23, 2005 11:01:15 AM	10 kb	
<a href="#">R34 03172005 094042</a>	Report Document	Thursday, March 17, 2005 9:40:43 AM	74 kb	
<a href="#">R34 03172005 111226</a>	Report Document	Thursday, March 17, 2005 11:09:39 AM	74 kb	
<a href="#">R34 03212005 075018</a>	Report Document	Monday, March 21, 2005 7:50:19 AM	73 kb	
<a href="#">R34 03222005 083610</a>	Report Document	Tuesday, March 22, 2005 8:36:11 AM	15 kb	
<a href="#">R34 03222005 104520</a>	Report Document	Tuesday, March 22, 2005 10:45:20 AM	73 kb	
<a href="#">R34 03232005 085632</a>	Report Document	Wednesday, March 23, 2005 9:09:30 AM	15 kb	
<a href="#">R34 03232005 085641</a>	Report Document	Wednesday, March 23, 2005 9:09:48 AM	15 kb	
<a href="#">R40 03162005 025824</a>	Report Document	Wednesday, March 16, 2005 2:58:25 PM	134 kb	
<a href="#">R40 03212005 084257</a>	Report Document	Monday, March 21, 2005 8:42:57 AM	8 kb	
<a href="#">R40 03212005 120217</a>	Report Document	Monday, March 21, 2005 12:02:18 PM	39 kb	
<a href="#">SCH00INT R02 03162005 104955</a>	Report Document	Wednesday, March 16, 2005 10:49:55 AM	22 kb	
<a href="#">SCH00INT R02 03212005 084352</a>	Report Document	Monday, March 21, 2005 8:43:53 AM	9 kb	
<a href="#">SCH00INT R02 03222005 112420</a>	Report Document	Tuesday, March 22, 2005 11:24:20 AM	22 kb	
<a href="#">SCH00INT R04 03162005 104852</a>	Report Document	Wednesday, March 16, 2005 10:48:52 AM	351 kb	
<a href="#">SCH00INT R04 03212005 134323</a>	Report Document	Monday, March 21, 2005 1:43:23 PM	359 kb	
<a href="#">SCH00INT R04 03222005 112308</a>	Report Document	Tuesday, March 22, 2005 11:23:10 AM	237 kb	

4. The **View Report** page will appear.
5. Click on the hyperlink in the **Name** column for the report you wish to view.
6. The report will appear, and it can be printed or downloaded from this page. If you want to share the report, you will need to save it to a shared drive.

## Selecting Reports

ELMNet has a variety of reports which are helpful in managing student loan information:

### R01 – Pending Disbursements - Summary

This report is a summary of all approved disbursements scheduled for the requested date range. The maximum date range for this report is 31 days.

### R02 – Pending Disbursements - Detail

This report provides details of all approved disbursements scheduled for the requested date range.

### R03 – ELM Status - Summary

This report is a summary of loan status for all borrowers in the school database.

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### R04 – ELM Status - Detail

This report provides details of loan status for all borrowers in the school database.

### R05 – Daily Cancelled Disbursements

This is a daily report of all disbursements cancelled by lenders.

### R06 – ELM Daily Certified Amount Exceptions

This is a daily report of loans which have a lender or guarantor-approved amount (including borrower-requested amount changes), that differs from the amount certified by the school.

### R07 – Service Bureau Confirmation and Volume Summary

This report is a summary of records passing through the ELM Service Bureau.

### R08 – Service Bureau Confirmation and Volume Summary - Detail

This report provides details of records passing through the ELM Service Bureau.

### R09 – Loans Guaranteed

This is a report of loans guaranteed through ELM lenders in both counts and dollars.

### R30 – Non-Cash Loan Application Update Requests

This is a report of all non-cash update request transactions (demographic change requests or disbursement date change requests), processed through ELMNet each day, sorted by lender.

### R31 – Promissory Note Print Request

This is a report of all students where a request for a replacement promissory note was entered into the ELMNet system.

### R32 – ELM Loan Deletion Request

This report is a list of all ELM loan deletion requests for schools.

### R34 – Certification Requests Report

All students where a request for a certification request on a loan or a credit denial was made by the lender.

### R35 – Certification Requests with Borrower Demographics Report

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This report includes all of the data contained on the R34 Certification Request Report with the addition of borrower demographic information.

### R40 – ELM Cash Transactions

This is a report of all cash transactions (cancellations, refunds, returns, and re-issues) processed through ELMNet each day, sorted by lender.

## Exercise 10

### **Creating and Viewing Reports**

1. Create and view a report that gives disbursement information for the month of January using **Report Selection**.
2. Create and view a report that gives status information for the month of January using **Report Selection**.
3. Create and view a report to see if any disbursements were cancelled by lenders yesterday using **Report Selection**.
4. Create and view a report of cash transactions processed through ELMNet yesterday using **Report Selection**.