

# Setting up Multiple Defaults

**E**LM Resources is pleased to offer you the ability to create and manage multiple default sets. This feature allows you to create up to 20 default sets per User ID and is available on the **Request Application** page, the **Clone Application** page, and the **Certification Request** page. You can set up multiple defaults for different loan periods, disbursement dates, or grade levels. This feature is a real timesaver as it reduces the manual entry of data.

## Creating Multiple Defaults

To create a new default set:

1. From the Function Selection menu, select either:
  - **Request Application** – To create a new loan application.
  - **Certification Requests** – To complete a certification request.
  - **Loan Retrieval**, select a loan, click the **CloneApp** button – To copy an existing application.
2. Scroll to the bottom of the page.

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The screenshot shows a web-based form for loan application. The form is divided into sections: 'Telephone' and 'Relationship to Borrower' at the top; 'Student Information' with fields for 'Student Last Name', 'First Name/MI', 'SSN', and 'Date of Birth'; 'School Information' with fields for 'Loan Period', 'Graduation Date', 'Certified Amount', 'Disbursement Dates #1-4', 'Grade Level', 'Enrollment Status', 'Certified Date', and 'Disbursement Hold/Release' options; 'Processing Type' and 'Promissory Note Delivery Method' dropdowns; and 'School Unique Loan ID' at the bottom. A red box highlights the bottom control bar, which includes 'Accept', 'Back', 'Clear', 'Select Default' (a dropdown menu), 'Apply Defaults', and 'Manage Defaults' buttons.

3. At the bottom of the page you will see the **Select Default** drop-down list, the **Apply Defaults** button, and the **Manage Defaults** button.

☞ If you do not have any default sets created, the option next to the Drop Down arrow will say **No Defaults**.

4. Click the **Manage Defaults** button.
5. Click the **New Default Set** button.

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 **Default Details**

Default Set Information	
Name of Default Set	<input type="text"/>

Loan Information	
Lender Code/Branch	<input type="text"/> - <input type="text"/>
Guarantor Code	No Default Value <input type="button" value="v"/>
MPN Type	No Default Value <input type="button" value="v"/>
Promissory Note Delivery Code	No Default Value <input type="button" value="v"/>
Processing Type Code	No Default Value <input type="button" value="v"/>
Enrollment Status Code	No Default Value <input type="button" value="v"/>
Grade Level	No Default Value <input type="button" value="v"/>
Loan Begin Date	<input type="text"/>
Loan End Date	<input type="text"/>
Anticipated Completion Date	<input type="text"/>

Disbursement Information		
Disbursement Number	Disbursement Date	Disbursement H/R
Disbursement #1	<input type="text"/>	Blank <input type="button" value="v"/>
Disbursement #2	<input type="text"/>	Blank <input type="button" value="v"/>
Disbursement #3	<input type="text"/>	Blank <input type="button" value="v"/>
Disbursement #4	<input type="text"/>	Blank <input type="button" value="v"/>

6. The **Default Details** page will appear.
7. Enter a name for this default in the **Name of Default Set** field.

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8. In the **Loan Information** section, you can enter defaults for:

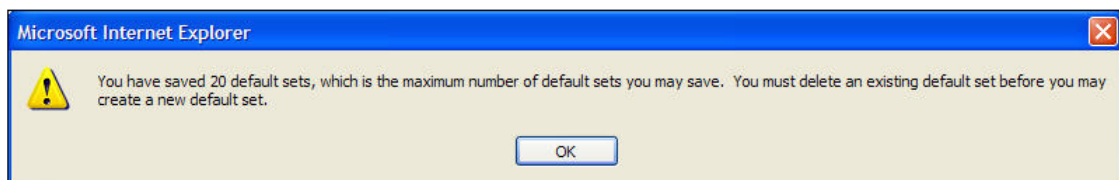
- Lender Code/Branch
- Guarantor Code
- MPN Type
- Promissory Note Delivery Code
- Processing Type Code
- Enrollment Status Code
- Grade Level
- Loan Begin Date
- Loan End Date
- Anticipated Completion Date

8. In the **Loan Information** section, you can enter disbursement date and hold or release information for up to four disbursements.

☞ You do not have to provide a default value for every field.

9. When you have entered the default information, click the **Save** button. The defaults you set up are specific to your ELM User ID.

☞ If you try to create more than twenty default sets, you will receive an error message.



## Using an Existing Default

When you have created a default set, you can select and use that default and other default sets that you have created.

To access a default set:

1. From the **Function Selection** menu, select either:

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- **Request Application** – To create a new loan application.
  - **Certification Requests** – To complete a certification request.
  - **Loan Retrieval**, select a loan, click the **CloneApp** button – To copy an existing application.
2. Scroll to the bottom of the page.
  3. Click on the drop-down arrow for the **Select Default** field.

The screenshot shows a web application interface with a teal header. The header contains the text '4th Disbursement Hold/Release' and 'School Unique Loan ID'. Below the header, there are several input fields and buttons. A dropdown menu is open, showing the options 'Select Default' and 'Sample Defaults'. The dropdown is positioned over a button labeled 'Select Default'. Other buttons visible include 'Delete', 'Clear', 'Back', 'Apply Defaults', and 'Manage Defaults'. The interface also includes radio buttons for 'Yes' and 'No' under the 'Default' label.

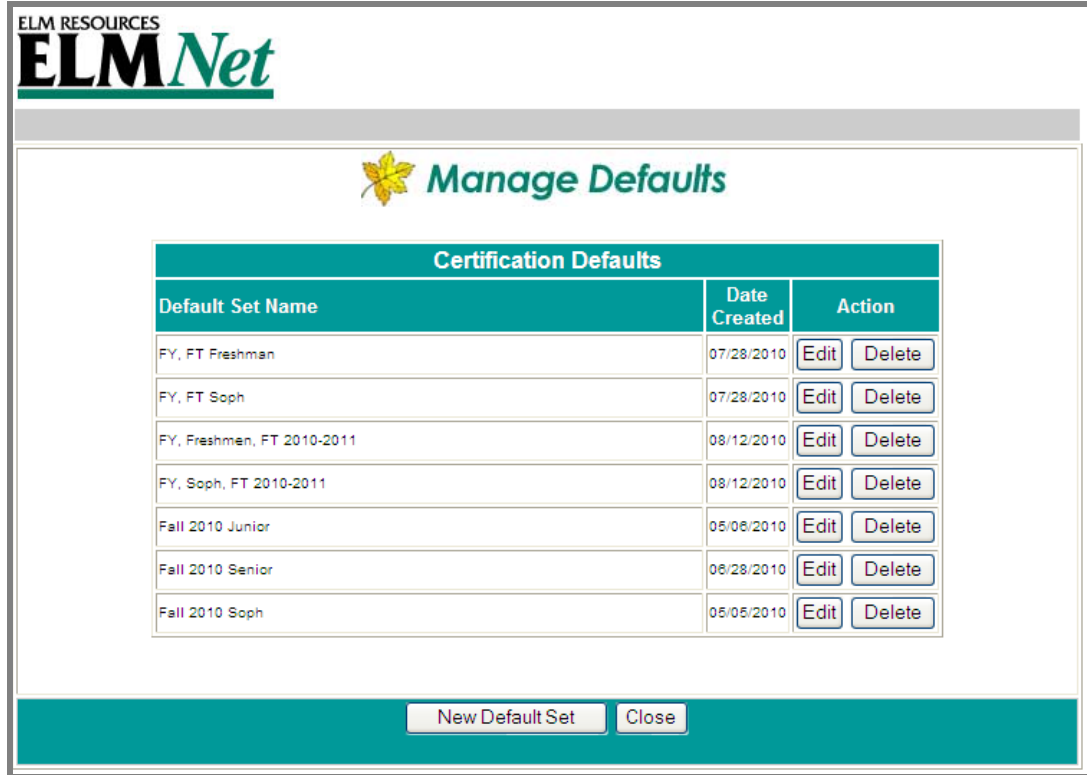
4. Select the default you wish to use.
5. Click the **Apply Defaults** button.
6. The page will be populated with the default values that you set up.

## Editing and Deleting Existing Defaults

To edit or delete a default that you have set up:

1. From the **Function Selection** menu, select either:
  - **Request Application** – To create a new loan application.
  - **Certification Requests** – To complete a certification request.
  - **Loan Retrieval**, select a loan, click the **CloneApp** button – To copy an existing application.
2. Scroll to the bottom of the page.
3. Click the **Manage Defaults** button.

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The screenshot shows the ELMNet interface for managing default sets. At the top left is the ELM RESOURCES logo. The main heading is "Manage Defaults" with a yellow leaf icon. Below this is a table titled "Certification Defaults". The table has three columns: "Default Set Name", "Date Created", and "Action". Each row represents a default set with its name, creation date, and two buttons: "Edit" and "Delete". At the bottom of the interface, there are two buttons: "New Default Set" and "Close".

Certification Defaults		
Default Set Name	Date Created	Action
FY, FT Freshman	07/28/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
FY, FT Soph	07/28/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
FY, Freshmen, FT 2010-2011	08/12/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
FY, Soph, FT 2010-2011	08/12/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Fall 2010 Junior	05/06/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Fall 2010 Senior	06/28/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Fall 2010 Soph	05/05/2010	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

4. The **Manage Defaults** page will appear.
5. To delete an existing default, click the **Delete** button for that default set.
6. To edit an existing default, click the **Edit** button for that default set, and edit the default information. Click the **Save Changes** button when done.
7. You may create a new default set from an existing default set. Click the Edit button for that default set and make the changes. Enter a new name for this default set, and then click the **Save as New Defaults** button.
8. If you have already created the maximum number of twenty default sets, then the **New Default Set** button will not be available.