

## Using Administrative Functions

*In this chapter we will look at changing your password and selecting security information.*

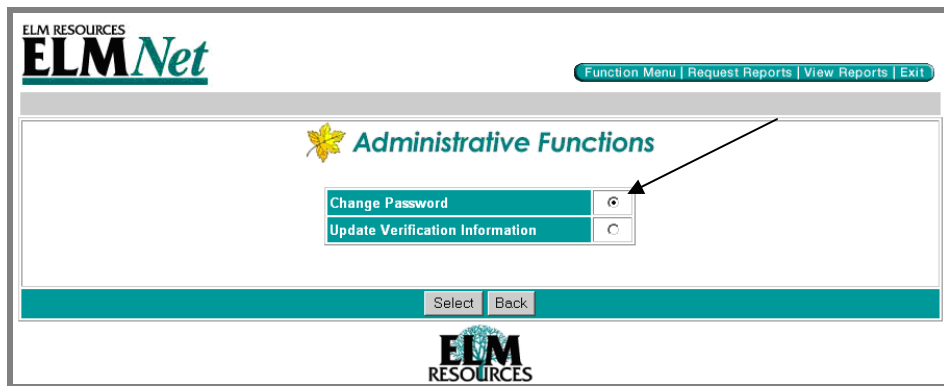
The Administrative functions allow you to change your password, and select the security question you will be asked if you forget your password. You will need to change your password every 90 days. After 90 days your User ID will become inactive, and you will need to contact your school's Security Contact for assistance. After 120 days your User ID will be deleted, and your school's Security Contact will need to request a new User ID for you.

 The **Security Contact** is the person at your school who receives and maintains your institution's ELM User IDs.

### Changing a Password

To change your password:

1. From the **Function Selection** menu, select **Administration**.
2. Select **Change Password**.



3. Click **Select**. The User Security – Change Password page appears.

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**User Security - Change Password**

Please enter the required information below:

Account Information	
Please enter your Current Password:	<input type="password"/> *
New Password: <a href="#">Password Rules</a>	<input type="password"/> *
Confirm New Password:	<input type="password"/> *

Accept Cancel

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4. Enter your current password in the **Current Password** field.
5. Enter your new password in the **New Password** field.
6. Enter your new password in the **Confirm New Password** field.
7. Click **Accept**.

**User Security - Password Rules**

**The following password guidelines must be met in order to create a valid password:**

- The password cannot be one of your 12 previous passwords.
- The password must be at least 8 characters long and no more than 14 characters long.
- The password must contain characters from at least three (3) of the following four (4) classes :
  1. English upper-case letters: A, B, C, ... Z
  2. English lower-case letters: a, b, c, ... z
  3. Westernized Arabic numerals: 0, 1, 2, ... 9
  4. Non-alphanumeric ("special characters"), such as punctuation symbols: !, @, #, \$, %, \*, ? (excluding the space bar - a space is invalid, and a double quote is invalid)
- The password cannot contain your User ID or any part of your full name.
- Passwords may only be changed 1 time within any 24 hour period.

## Forgetting Your Password

If you forget your password:

1. Go to the **Logon** page.

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**Logon**

Latest Status of ELM System Components, [click here](#)

User ID

Password

Forgot your password? [Click here](#)

Ask The Trainer

Please note that if you type the password incorrectly three times, your User ID and password will be locked and you will not be able to log in. To avoid being locked out, we recommend that after two incorrect log in attempts, click on the link "Forgot your password?" and enter your User ID and your e-mail address. This will automatically send to ELM a request to generate a new temporary password which will be e-mailed to you. Once you receive that e-mailed temporary password, you can start the process to log-in again using the new one time password.

This is provided as a service to schools, lenders, holders and servicers of student loans. By using this service I am certifying that the data accessed relates to a prospective, current or former student of the school on whose behalf I am working. By using this site, I agree that my use of this site is subject to ELM Resources' standard [Terms of Use](#) and [Privacy Policy](#), and that I will keep all information obtained from this site secure and confidential at all times and will notify ELM Resources of any breach of the security of this information. Access to student loan information by anyone other than persons authorized by ELM Resources is strictly prohibited. ELM Resources reserves the right to deny access to this service.

Accept Clear

2. Click the **Forgot your password?** hyperlink. The User Security – Forgot Password page appears.

**User Security - Forgot Password**

User Verification

Please enter your user ID:

Please enter your email address:


Continue Back

If you have any questions, please contact us at 866.524.8198,  
Monday - Friday, regular business hours.

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3. Enter your user ID.
4. Enter your email address.
5. Click **Continue**.

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 **User Security - Forgot Password Continued**


Predetermined Question

What is your pet's name?

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6. The User Security – Forgot Password Continued page appears. Enter the answer to the security question you previously selected.
7. Click **Continue**. The Confirmation page will appear.

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 **User Security - Forgot Password Confirmation**

A new password will be generated and sent to you via email.

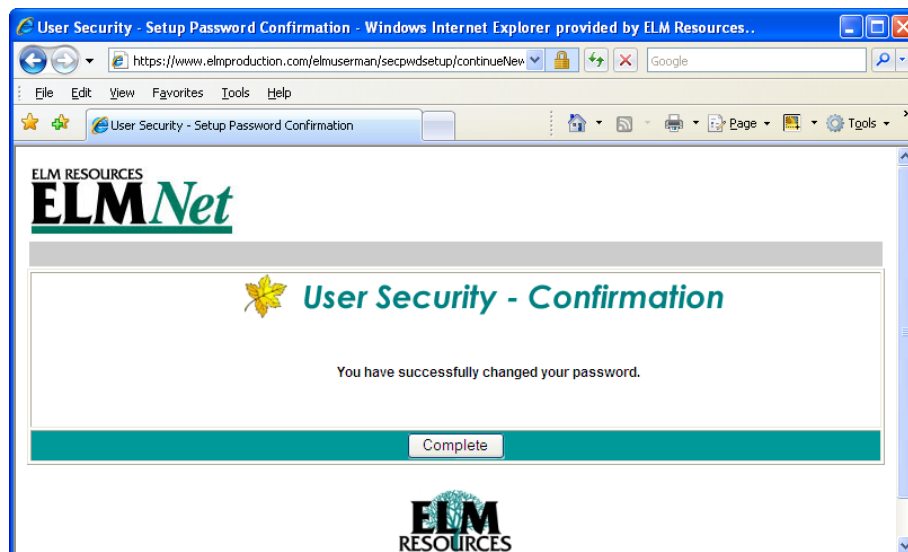
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8. Click **Exit**. You will receive a one-time-use-only password by e-mail. This password lets you log in one time, and change your password. The one-time-use-only password must be used within ninety days. The security contact at your institution receives an automatic notification when a password is reset.
9. Copy and paste the one-time-use-only password into the password field on the **Logon** page.
10. Click **Accept**.
11. The Verification Information page appears. Click **Continue**.

## USING ADMINISTRATIVE FUNCTIONS





12. The Select New Password page will appear.
13. Create and enter a new password in the **New Password** field. The new password must follow the password rules.
14. Confirm the new password by entering it in the **Confirm New Password** field.
15. Click **Continue**.



16. The Confirmation page will appear. Click **Complete**.

## USING ADMINISTRATIVE FUNCTIONS

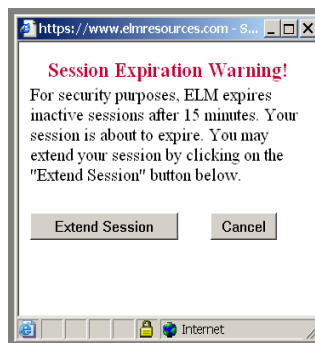
17. The **Logon** page will appear. You can now log in with your User ID and new password.

-  If you try to log in to ELMNet four times unsuccessfully, then you will be locked out of the system and must request a one-time-use-only password from your institution's ELM Security Contact.
-  One-time-use-only passwords are given to first-time users, users whose User IDs have expired, users who have locked themselves out of the system, and users who have forgotten their password.

### Working with System Timeouts

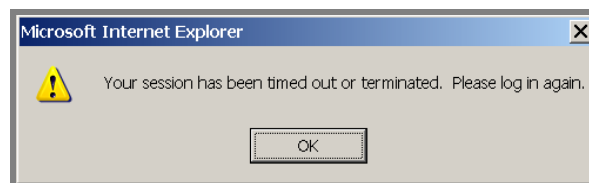
To provide greater security, the ELMNet system times out after fifteen minutes of inactivity. Inactivity means that you have not moved to a new page or transmitted data. If you are entering data on a page and have not moved to a new page or transmitted data, then the system will time out. This security measure helps prevent unauthorized use of your account if you are away from your desk for longer than fifteen minutes.

The system will provide a pop-up warning after fourteen minutes of inactivity. You can click **Extend Session** to continue working.



To continue working:

1. Click **Extend Session**.
2. If you do not click **Extend Session**, the system will time out, and you will receive a time-out message. You will need to log in again to continue working.



## USING ADMINISTRATIVE FUNCTIONS

- ✍ If your computer has a pop-up blocker activated, you will not receive the **Extend Session** warning. If you want to receive the **Extend Session** warning, disable your pop-up blocker for the ELMNet website.

### Working with User Accounts as the ELM Security Contact

If you are the designated Security Contact for ELMNet at your school, then you can submit requests to create user accounts. In addition, ELM Security Contacts are able to reset passwords, modify permissions and deactivate user accounts.

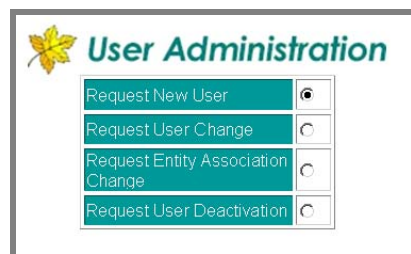
- ☞ If multiple IDs are needed or if you have multiple campuses, contact ELM for a form that will expedite this process.
- ☞ ELM allows schools to designate more than one person as a Security Contact. Contact ELM if you would like to designate additional Security Contacts for your institution.

To set up a new user:

1. From the **Function Selection** menu, select **Administration**.



2. Select **User Administration**.
3. Click **Select**.



## USING ADMINISTRATIVE FUNCTIONS

4. Select **Request New User** and click **Select**.
5. The **Request New User** page will appear.
6. Click the drop-down arrow for the **Company Name** field. Select your school.
7. Enter the new user's last name in the **Last Name** field.
8. Enter the new user's first name in the **First Name** field.
9. Enter the new user's telephone number in the **Telephone** field.
10. Enter the new user's fax number in the **Fax #** field.
11. Enter the new user's e-mail address in the **Email Address** field.
12. Highlight the school code and branch which will be associated with this user in the **Associate Entity Code/Branch** field.
13. Select the permissions for this user. The permissions can be:
  - **Inquiry Only** – This allows the user to view data, but make no change requests.
  - **Inquiry/Update** – This allows the user to view data and request changes.
  - **Inquiry/Update/Mailbox** – This allows the user to view data, request changes, send and receive files through ELMNet Mail Box Services.
  - **Inquiry/Mailbox** – This allows the user to view data, send and receive files through ELMNet Mail Box Services. They will not be able to request changes.
  - **Inquiry/Update/Bursar Mailbox** – This allows the user to view data, request changes, send and receive files through ELMNet Mailbox Services, but only through the Bursar Mailbox.
  - **Inquiry/Bursar Mailbox** – This allows the user to view data, send and receive files through ELMNet Mailbox Services, but only through the Bursar Mailbox They will not be able to request changes.
14. Click **Accept**.



### What's a bursar?

A bursar is a financial officer of a college or university who receives payment of tuition and miscellaneous fees.

To reset a user password:

1. From the **Function Selection** menu, select **Administration**.

## USING ADMINISTRATIVE FUNCTIONS

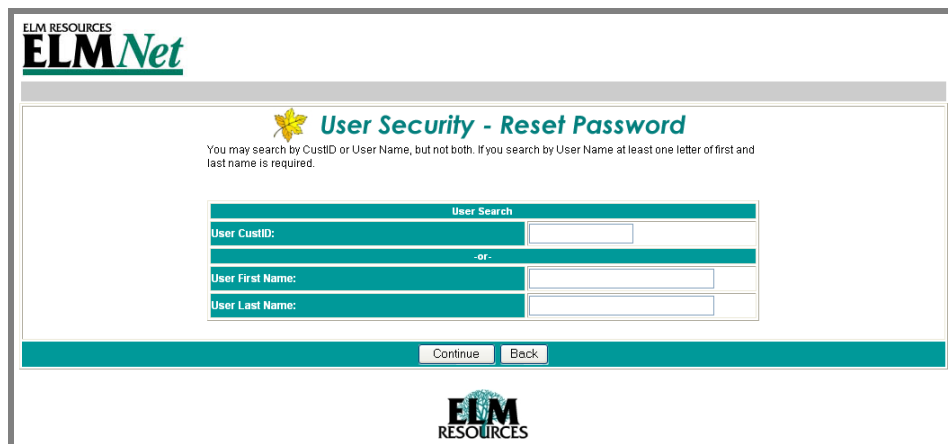


The screenshot shows a web interface titled "Administrative Functions" with a yellow maple leaf logo. Below the title is a table with five rows, each containing a function name and a radio button. The "Reset User Password" option is selected. At the bottom of the table are two buttons: "Select" and "Back".

Function	Radio Button
User Administration	<input type="radio"/>
Reset User Password	<input checked="" type="radio"/>
Change Password	<input type="radio"/>
Update Verification Information	<input type="radio"/>
Access Profile Manager	<input type="radio"/>

Select Back

2. Select **Reset User Password**. Click **Select**.



The screenshot shows a web interface titled "User Security - Reset Password" with a yellow maple leaf logo. Below the title is a message: "You may search by CustID or User Name, but not both. If you search by User Name at least one letter of first and last name is required." Below the message is a "User Search" form with three input fields: "User CustID:", "User First Name:", and "User Last Name:". At the bottom of the form are two buttons: "Continue" and "Back".

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**User Security - Reset Password**

You may search by CustID or User Name, but not both. If you search by User Name at least one letter of first and last name is required.

User Search

User CustID:

-or-


User First Name:

User Last Name:

Continue Back

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3. Enter the UserID in the **CustID** field or enter the User's first name and last name.

 A Security Contact cannot reset their own password, or the password of another Security Contact. You must contact ELM to have a Security Contact's password reset.

4. The **User Security – Verification** screen is displayed.
5. Verify that the correct UserID whose password needs to be reset is displayed.
6. Verify that the e-mail address is accurate.
7. Select **Generate Password**.
8. The message that the password has been generated and e-mailed to the user will be displayed.

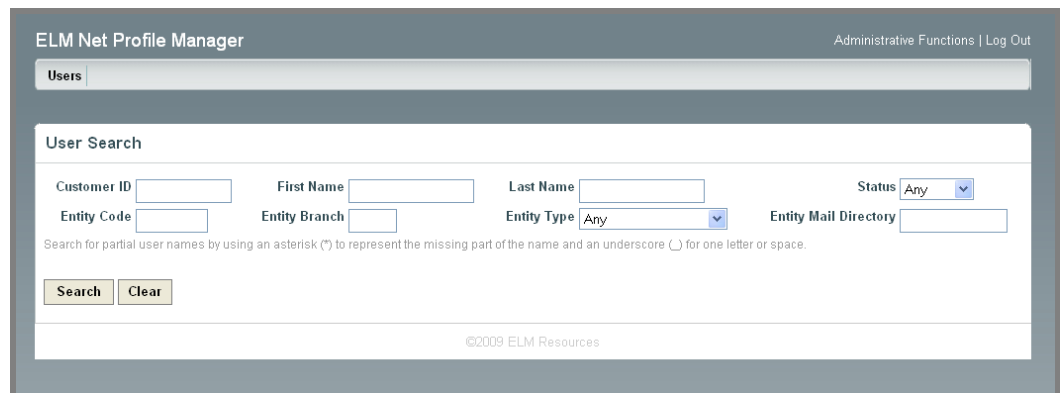
## USING ADMINISTRATIVE FUNCTIONS

To update a User's access to ELMNet and contact information:


1. From the **Function Selection** menu, select **Administration**.



2. Select **Access Profile Manager**. Click **Select**.

A screenshot of the "ELM Net Profile Manager" web application. The page has a header with "Administrative Functions | Log Out" on the right. Below the header is a "Users" tab. The main content area is titled "User Search" and contains several search fields: "Customer ID", "First Name", "Last Name", "Entity Code", "Entity Branch", "Entity Type" (a dropdown menu set to "Any"), and "Entity Mail Directory" (a text input field). There is also a "Status" dropdown menu set to "Any". Below the search fields is a small text instruction: "Search for partial user names by using an asterisk (\*) to represent the missing part of the name and an underscore (\_) for one letter or space." At the bottom of the search area are "Search" and "Clear" buttons. The footer of the page contains the copyright notice "©2009 ELM Resources".

3. The **ELMNet Profile Manager** screen is displayed.
4. Enter the Customer ID or enter the User's first name or last name.

 When you enter a first name or last name, you may enter just the first letter of that name.

5. Click **Search**.

# USING ADMINISTRATIVE FUNCTIONS

ELM Net Profile Manager Administrative Functions | Log Out

Users

User Search Results

Customer ID:  First Name:  Last Name:  Status:

Entity Code:  Entity Branch:  Entity Type:  Entity Mail Directory:

Search for partial user names by using an asterisk (\*) to represent the missing part of the name and an underscore (\_) for one letter or space.

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Customer ID	First Name	Last Name	Mailbox Access	System Authority	User Role	Email	Phone Number	Status	Company Name	Receive Email Updates
LEN55TT	Tom	Test	No	Inquiry Only	USER	tomtest@xyzl.com	(555)555-5555	Active	XYZ Lending	No

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Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

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6. The **ELMNet Profile Manager** screen is displayed with a list of all users found that met your search criteria.
7. To select the user whose details you wish to view, click the User ID, first name or last name.

To send an e-mail to the user using your e-mail program, you may click the e-mail address.

ELM Net Profile Manager Administrative Functions | Log Out

Users

User Details for Tom Test

Basic Details

First Name \*  Last Name \*

Phone Number \*  Phone Extension

Fax Number  Email \*

Test or Production \*

Database Status \*  Company Name

Domain Status

Access Details

Mailbox Access  Non-Cash Transaction Access

Certification Access  Cash Transaction Access

System Authority \*  User Role \*

Entity   
Field should be blank if user needs access to multiple mailboxes.

\* = Required Field

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Entity Name	Entity Code	Entity Branch	Entity Mail Directory	Entity Type
XYZ Lending	003333	00	XYZ	LENDER

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## USING ADMINISTRATIVE FUNCTIONS

8. The **ELMNet Profile Manager** screen is displayed.

☞ Required fields appear with a red asterisk after the field name. Fields in gray cannot be modified.

9. Under **Basic Details**, you may update the following fields: First Name, Last Name, Phone Number, Phone Extension, Fax Number, Email address.

10. Under **Access Details**, you may update the following fields: Mailbox Access, Certification Access, Non-cash Transaction Access, Cash Transaction Access, and System Authority. Checking any of the boxes will give the userid access to the area.

a. **Mailbox Access:** A checkmark here gives the User access to Mailbox Services (reports and files) sent via ELMNet.

b. **Certification Access:** A checkmark here gives the User access to view and certify Certification Requests posted on ELMNet. Check this if the user has Inquiry Only Access and you want the user to see or certify the Certification Requests.

c. **System Authority:**

i. **No Web Access:** Users will be provided an ELMNet ID, but will not be able to logon.

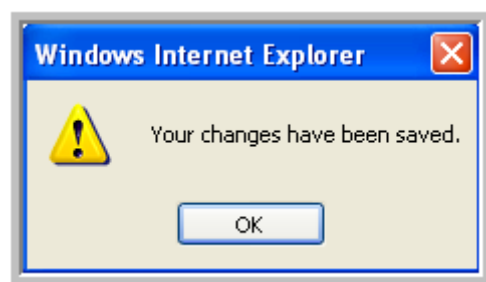
ii. **Inquiry Only:** provides view only access to ELMNet records.

iii. **Update:** provides edit ability to ELMNet records.

d. **Non-Cash Transaction Access:** allows Users to process non-cash changes to loan records (such as a change to the Hold/Release flag). Un-check this if the user has Update Access and you do not want the user to be able to make Non-Cash Transaction change requests.

e. **Cash Transaction Access:** allows Users to process cash changes to loan records (such as a return of funds). Un-check this if the user has Update Access and you do not want the user to be able to make Cash Transaction change requests.

11. Click Save.



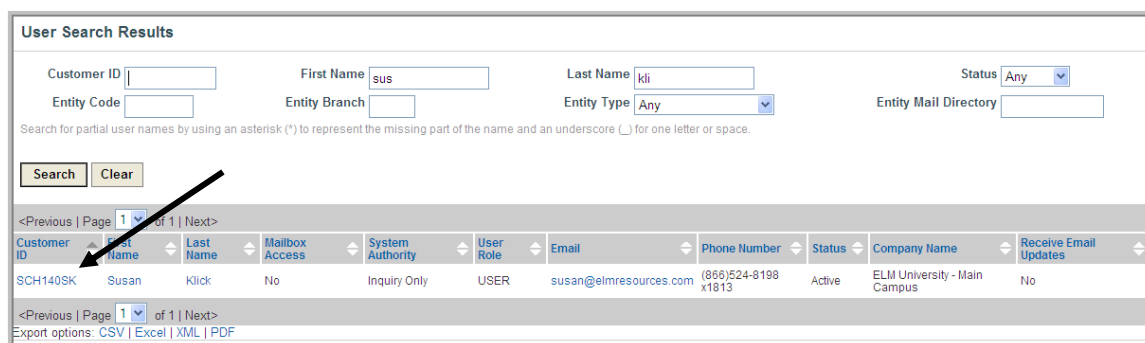
# USING ADMINISTRATIVE FUNCTIONS

12. Click OK.

 It is recommended that **System Authority** be selected before any check boxes are selected.

To temporarily disable a User's access to ELMNet:

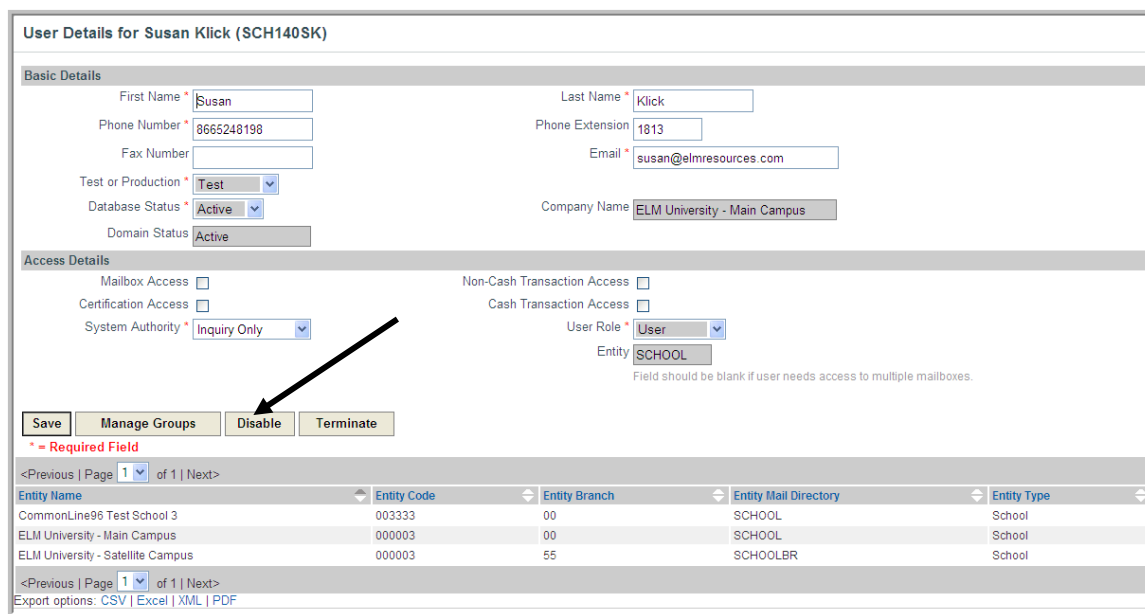
1. In Profile Manager, click the link to the **Customer ID** you wish to access.



The screenshot shows the 'User Search Results' page. At the top, there are search filters for Customer ID, First Name (sus), Last Name (kli), Entity Code, Entity Branch, Entity Type (Any), and Status (Any). Below these are 'Search' and 'Clear' buttons. A table below the search filters shows search results for 'Susan Klick' (Customer ID: SCH140SK). A black arrow points to the 'Customer ID' column header in the table. Below the table are pagination controls and export options (CSV, Excel, XML, PDF).

Customer ID	First Name	Last Name	Mailbox Access	System Authority	User Role	Email	Phone Number	Status	Company Name	Receive Email Updates
SCH140SK	Susan	Klick	No	Inquiry Only	USER	susan@elmresources.com	(866)524-8198 x1813	Active	ELM University - Main Campus	No

2. The **User Details** page appears.



The screenshot shows the 'User Details for Susan Klick (SCH140SK)' page. It is divided into 'Basic Details' and 'Access Details' sections. In 'Basic Details', fields include First Name (Susan), Last Name (Klick), Phone Number (8665248198), Phone Extension (1813), Fax Number, Email (susan@elmresources.com), Test or Production (Test), Database Status (Active), and Domain Status (Active). In 'Access Details', there are checkboxes for Mailbox Access, Certification Access, Non-Cash Transaction Access, and Cash Transaction Access. The System Authority is set to 'Inquiry Only' and the User Role is 'User'. The Entity is 'SCHOOL'. A black arrow points to the 'Disable' button. Below the form are 'Save', 'Manage Groups', 'Disable', and 'Terminate' buttons. A legend indicates that an asterisk (\*) denotes a required field. At the bottom, there is a table with columns for Entity Name, Entity Code, Entity Branch, Entity Mail Directory, and Entity Type.


Entity Name	Entity Code	Entity Branch	Entity Mail Directory	Entity Type
CommonLine95 Test School 3	003333	00	SCHOOL	School
ELM University - Main Campus	000003	00	SCHOOL	School
ELM University - Satellite Campus	000003	55	SCHOOLBR	School

3. Click **Disable** to prevent the User from being able to access ELMNet.

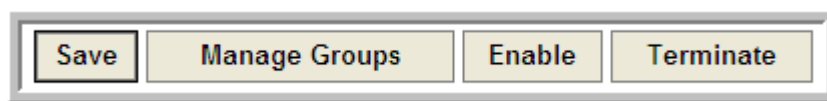
## USING ADMINISTRATIVE FUNCTIONS



4. Click **OK**.

 The Disable button allows for a temporary suspension of a user's access to ELMNet. Once disabled, the User's ID will not be deleted by ELM, and can be reactivated in the future.

5. To reactivate an ID that was previously disabled, access the User's ID from the **User Details** page. The button now says **Enable**.



6. Click **Enable**.
7. The User's ID will be reactivated. Click **OK**.



To terminate a User's access to ELMNet:

1. In Profile Manager, click the link to the **Customer ID** you wish to access.

# USING ADMINISTRATIVE FUNCTIONS

**User Search Results**

Customer ID  First Name  Last Name  Status   
Entity Code  Entity Branch  Entity Type  Entity Mail Directory

Search for partial user names by using an asterisk (\*) to represent the missing part of the name and an underscore ( ) for one letter or space.

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Customer ID	First Name	Last Name	Mailbox Access	System Authority	User Role	Email	Phone Number	Status	Company Name	Receive Email Updates
SCH140SK	Susan	Klick	No	Inquiry Only	USER	susan@elmresources.com	(866)524-8198 x1813	Active	ELM University - Main Campus	No

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Export options: CSV | Excel | XML | PDF

2. The **User Details** page appears.

**User Details for Susan Klick (SCH140SK)**

**Basic Details**

First Name \*  Last Name \*   
Phone Number \*  Phone Extension   
Fax Number   
Email \*   
Test or Production \*   
Database Status \*   
Domain Status   
Company Name

**Access Details**

Mailbox Access  Non-Cash Transaction Access   
Certification Access  Cash Transaction Access   
System Authority \*  User Role \*   
Entity   
Field should be blank if user needs access to multiple mailboxes.

\* = Required Field


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Entity Name	Entity Code	Entity Branch	Entity Mail Directory	Entity Type
CommonLine96 Test School 3	003333	00	SCHOOL	School
ELM University - Main Campus	000003	00	SCHOOL	School
ELM University - Satellite Campus	000003	55	SCHOOLBR	School

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Export options: CSV | Excel | XML | PDF

3. Click **Terminate** to prevent the User from being able to access ELMNet. Click **OK**.



 The **Terminate** button results in a permanent action to deactivate the user ID. If a userid has been terminated, it cannot be reactivated. A new userid for the user will need to be requested.

# USING ADMINISTRATIVE FUNCTIONS

4. Click **OK**.

To manage groups

Managing groups allows multi-campus Security Contacts to add or remove groups that are assigned (i.e. allowing staff to belong to groups that represent related entities that share ELMNet loan functionality):

1. In Profile Manager, click the link to the **Customer ID** you wish to access.
2. The **User Details** page appears.
3. Click **Manage Groups** to add or delete Groups from the User's access.

**User Details for Susan Klick (SCH140SK)**

**Basic Details**

First Name \* Susan Last Name \* Klick  
Phone Number \* 8665248198 Phone Extension 1813  
Fax Number  
Email \* susan@elmresources.com  
Test or Production \* Test  
Database Status \* Active Company Name ELM University - Main Campus  
Domain Status Active

**Access Details**

Mailbox Access  Non-Cash Transaction Access   
Certification Access  Cash Transaction Access   
System Authority \* Inquiry Only User Role \* User  
Entity SCHOOL  
Field should be blank if user needs access to multiple mailboxes.

Save Manage Groups Disable Terminate

\* = Required Field

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Entity Name	Entity Code	Entity Branch	Entity Mail Directory	Entity Type
CommonLine96 Test School 3	003333	00	SCHOOL	School
ELM University - Main Campus	000003	00	SCHOOL	School
ELM University - Satellite Campus	000003	55	SCHOOLBR	School

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Export options: CSV | Excel | XML | PDF

4. The **Manage User Groups** page will be displayed.

## USING ADMINISTRATIVE FUNCTIONS

ELM Net Profile Manager Administrative Functions | Log Out

Users

Manage User Groups for Kathy Williams (SCH226KW)

Existing Groups

Current Groups --Select One-- Delete Group

New Groups

New Groups --Select One-- Add Group

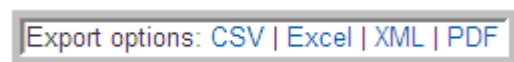
Back

5. Under Existing Groups: select the drop down arrow next to Current Groups to view all assigned Groups for this user. You may delete a group from this user's access by highlighting a group and selecting **Delete Group**.
6. Under New Groups: select the drop down arrow next to New Groups to view all Groups that could be assigned to this user. You may add a group to this user's ID by highlighting a group and selecting **Add Group**.

✎ If you have not been granted access to certain groups for your institution, you will not be able to view those groups nor perform add/delete functions for their users. If you delete all the groups for a user, you will not be able to manage that user in the future.

To export or print the results:

1. Options are noted in the lower left-hand corner of both the Profile Manager and User Details screens.



2. Click on the option you need:
  - a. CSV: opens a Comma Separated Value file.
  - b. Excel: opens an Excel spreadsheet.
  - c. XML: opens the Internet browser and provides the data in XML code.
  - d. PDF: opens a PDF document.

## USING ADMINISTRATIVE FUNCTIONS

3. Save or print the file in the chosen format.