

# Web Administrator System Guide

August 11, 2023

## **Table of Contents**

Web Administrator Definitions	3
Setting up a New User	4
Managing a User	10
Adding a User to a New Group or Department	12
Adding or Updating Licensing Information for a User	14
Username/Password Help	16

## Web Administrator Definitions

Use the information below to help select the user's appropriate access level when setting up a new and/or updating a current user in the online commitment system. You must assign a "Security Groups" **and** a "Departments" to every user profile.

#### **Security Groups**

Assign users a Security Groups, which determines the access they will have in the online commitment system:

- Lending Partner Admin Allows user to set-up user accounts "Web Admin".
  - More than one web admin is permitted.
  - If you select this option, you must also select "Lending Partner," "Lending Partner Associate," and "Lending Partner Read Only."
- Lending Partner Allows users to lock and "True and Certify" a loan, as well as make changes to a loan once it is locked.
- Lending Partner Associate Allows users to lock the loan.
- Lending Partner Read Only Allows user to view pipeline and upload closed loan files.

All Security Groups have access to order documents.

\*The web administrator should have all four Security Groups.

#### Departments

Assign users a Departments based on their role in the loan process (select only one):

- Loan Officer Select this option for any originator. This will ensure loans are assigned correctly to individuals that originate loans.
  - You must include the loan officer's NMLS license number.
- Lending Partner -Select this option for anyone who is not a loan officer, but needs access to the system (i.e. underwriter, closer, processor, lock desk, etc.).
- Lender QC Select this option for anyone who should be notified by the Minnesota Housing Quality Control team when a loan is selected for audit.
  - This user will be responsible for working with and resolving Quality Control audits.

\*The web administrator should have all three Departments.

#### Setting up a New User

• Log into the <u>Online Commitment System</u>.

After login into the Online Commitment System, the initial landing page will be the **Announcements and Pipeline** screen.

#### To create a New User

- Click on User Profile icon
- Click on Administration Mode (off) to access User Management.

🕋 🖬 🖄 Q	Minnesota Housing Loan Commitment System
Announcements and Pipeline	User Settings
Announcements	Department   Lending Partner
No announcements.	Admin Mode (off)
Pipeline Dashboard	The search returned more than 1000 results. Refine the search criteria for more precise results.
Pipeline Filters	Grid Views
All Loans - 🗭	Default Pipeline Vista -

• Select the User Management icon and click **Add User** icon in the top Right corner of the page.

* *	Administration Mode		4
User Management		Ċ	B
User Filters All Active Users	Add User 🏖		

- Complete the following fields under General Information tab
  - Account Expiration
    - The account expiration date is automatically set by the system a year from current date.
  - o First Name
  - o Last Name
  - o Email Address
  - Work Phone
  - Client (lender company name)
  - Choose a Channel
    - If lender is originating both HO (home ownership) and HI (home improvement) select the most relevant channel.
    - Failure to select a channel will result in not being able to see the new user.
    - If the user originates both HO and HI, they will only be able to import a loan application under the channel assigned to them and will have to manually enter the loan under the other channel.

\*Note: Middle Name, Ext, Fax Number, Position, Commission % and User's Manager and User is a Manager checkbox are not required fields.

General Information Authentication	Links Licensing						
New Blank User							
Account Status Account Active	Account Inactive	Account Expiration * 12/08/2021		Account is Locked		Force Password Change on Next Login	Required Fields
Piccount Active	Account indeave						
First Name *		Last Name *				Middle Name	
Keanu		Reeves					
Email Address *		Work Phone *	_	Ext		Fax Number	
keanu.reeves@testbank.com		(651) 296-0000				()	
			-				
Client *	_	Channel		Position		Commission %	
Test Bank Version 1.1.2.55		Homeownership	•	Select	•	0.000%	
User's Manager							
	•						
User is a Manager							

- Complete the following fields under Authentication tab
  - Username should be set as the **person's work email address, not a general shared mailbox account.**
  - Password Requirements:
    - Must contain at least 12 characters
    - Must contain at least one uppercase letter
    - Must contain at least one lowercase letter
    - Must contain at least one number
    - Must contain at least one special character (!"#\$%&'()\*+,-./:;<=>?@[\]^\_`{)
    - Password must be changed every 6 months
    - Passwords cannot be reused
- Even if checked, Force Password checkmark **does not save** when a user account is created. It is only saved after the user account is created, Force Password is checked and user account is saved.

\*Note: SSO Username, and PowerBI Username are not required fields.

- Multi-Factor Authentication is required to log into the Loan Commitment System.
- Users will need a code to login.
  - There are 2 options to receive this code: Work email address and via text using cell phone and cell phone carrier information i.e. Verizon or AT&T.
- Recommendation: Verify both multifactor fields are updated in the system.

Γ	General Information Authentication Links Licensing			
	New Blank User			
				Required Fields
	Username *	Password *	Multi-Factor Email	Multi-Factor Phone
	example@lender.com		example@lender.com	1234567890
	Multi-Factor SMS Provider			
	Verizon			
	SSO Status	SSO Username	PowerBI Username	
1	SSO Active SSO Inactive			

Complete the following fields under Links tab

- Select appropriate boxes to assign to the new user under Security Groups:
  - **Lending Partner** Can enter a loan from lock to true and certify.
  - **Lending Partner Admin** This is the Web Administrator; this membership should not be selected for any other user.
  - **Lending Partner Associate** Can enter a loan through lock.
  - Lending Partner Read Only Can view loan data only.
- Select appropriate **Department** (must set as Default for one of these):
  - **Lending Partner** (underwriter, processor, closer, lock desk, etc.)
  - Loan Officer (allows the Loan Officer name to be selected)
  - Lender QC (closer, post closer, etc.)
- Multiple Departments are needed:
  - Set the Default Department that is appropriate for a user (i.e. Lending Partner (Default) and Lender QC or Loan Officer (Default) and Lender QC).
- Select Operation Centers:
  - Correspondent Ops Center
    - Set as Default

New Blank User				
curity Groups	Departments	Operation Centers *	Regions	* Required Fiel
			Regions	
API Full Access	Account Executives (W)	<ul> <li>Correspondent Ops Center</li> </ul>	Al	
BSPS	Accounting			
Business Technology Support	Adverse Action (R)			
Internal Manager	Appraisal Review (C)			
	Disclosure Desk (R)			
Lending Partner	File Review (C)			
Lending Partner Admin				
Lending Partner Associate	Lender QC			
Lending Partner Read Only	Lending Partner			
Partner Solutions	Loan Officer (Default)			
Portfolio Management	MC Administrators			
Quality Control	Portfolio Management			
Secondary	Purchase Advice (C)			
SyntheticGroupForMonitoring	Purchase Review (C)			
syntheticeroupromonitoring	Quality Control			
	Secondary (C)			
	Secondary (W)			
	Withdrawal Review (C)			

- Complete the following fields under **Licensing** tab if Loan Officer user has an NMLS number.
  - Select the Add License icon in the bottom right corner of the User Management screen

General Information Authentica	tion Links Licensing							
Lev Blank User								
							Ac	ld License 🚍
State	License Number	Туре	Activation	Expiration	Active	Exempt	National	Actions

- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - o License Type
    - > Type NMLS will display Loan Officer's NMLS# on the documents
  - o License Number
  - State auto fills N/A when NMLS is selected
  - Activation Date (date user is added)
  - Expiration Date (Enter 12/31/2099)
  - License Active is pre checked
  - Click Add

Add License	×
	* Required Fields
License Type	License Number *
NMLS -	651789
State *	Activation Date *
N/A -	10/03/2021
Expiration Date *	
12/31/2099	
✓ License Active	License Exempt
Cancel	Add

• Select the Add License icon again to add multiple License numbers.

• Once all fields have been completed, select the **Save** icon in the top Right corner of the screen to complete the New User account.



• If done correctly, the following notification will display:

	✓ The changes were successful.	×
_		

• If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.



Recommendation: Test the new user. Log in as the new user if able to login, email new user their username and password.

• Once the user logs into the system please have the user go in the "User Settings" to set up a new password and username/password recovery question.



- Select "Password/Security" tab.
- Set up a new password and username/password recovery question.

	Minnesota Housing Loan Commitment System	
User Settings		×
	My Profile	Password / Security
Password Recovery		
Change Recovery Question		
Change Password		
Change Password		
		Cancel Save

### Managing a User

To manage a current user

- Click on User Profile icon
- Click on Administration Mode (off) to access User Management.

🕋 🗐 🖄 Q	Minnesota Housing Loan Commitment System
Announcements and Pipeline	🗘 User Settings
Announcements	Department   Lending Partner
No announcements.	C Admin Mode (off)
Pipeline Dashboard	The search returned more than 1000 results. Refine the search criteria to more precise results.
Pipeline Filters	Grid Views
All Loans - 🗹 📿	Default Pipeline Vista 🔹 🕅 🍸

- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.

* *						Administration N	lode					
Jser Management												Ċ
User Filters All Active Users		•								Add	Jser 🚑	<u> </u>
			_						a	Search	grid data	
Last Name	T	First Name	T	Email	T	Client	Channel	User Manager 🛛 🍸	Account Status	Y	T	Last Updated
۹		۹		۹		۹	۹	۹	۹		۹	
Brains		Jonnie		jbrains@state.mn.us		Test Bank Newest Release	Homeownership		Active			03/15/2022
DI dITIS												
Brains		Zelda		zbrains@state.mn.us		Test Bank Newest Release	Homeownership		Active			03/15/2022

\*Note: Turn on column filter to filer the column

Or

- Type in the name you are looking for in the **Search grid data** text box.
  - A scroll bar will appear to the right of the grid if more users are available then what is displayed on the screen.

A 🖀			Admir	nistration Mode				*
User Management							Ċ	B
User Filters All Active Users	•					A du	dd User 🏰 🛛 🔃 🔪	•
Last Name	First Name	Email T	Client	Channel T	User Manager	Account Status	T Last Updated	
Q	۹	Q	۹	۹	۹	۹	۹	1
Duck	Daisy	daisy@test.com	Test Bank Newest Release	Homeownership		Active	03/14/2022	2
Duck	Donald	don@test.com	Test Bank Newest Release	Homeownership		Active	03/14/2022	2

• Double-click on the User that you would like to manage.

#### Locked Account

 If account is locked, Account is Locked is checked on General Information tab. Uncheck to unlock account.

General Information Authent	ication Links Licensin			
Record selected Daisy Duck   daisy@test.co	om Unsaved (	hanges 🛕		
				* Required Field
Account Status Account Active	Account Inactive	Account Expiration * 03/14/2023	Account is Locked	Force Password Change on Next Login
First Name *		Last Name *		Middle Name
Daisy		Duck		

• Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.



#### Password Reset

• To reset password, type in temporary password into Password on Authentication tab.

General Information Authentication Links	Licensing		
Record selected Daisy Duck   daisy@test.com	Unsaved Changes		
			* Required Fie
Username *	Password *	Multi-Factor Email	Multi-Factor Phone
daisy@test.com	→	username@example.com	()

 Select the Save icon in the top Right corner of the screen and communicate the New Password to the User.



## Adding a User to a New Group or Department

- Click on User Profile icon
- Click on Administration Mode (off) to access User Management.

🐔 🗏 🗘 🔍	Minnesota Housing Loan Commitment System
Announcements and Pipeline	🗘 User Settings
Announcements	Lending Partner
No announcements.	C Admin Mode (off)
Pipeline Dashboard	A The search returned more than 1000 results. Refine the search criteria for more precise results.
Pipeline Filters	Grid Views
All Loans - 🕜	Default Pipeline Vista 🔹 🔛 📉

- Select the user from the list of active users:
  - $\circ$   $\;$  Users that are not active can be found using User Filters: All Users.

* 答					Administration	n Mode				
ser Management										C,
Jser Filters All Active Users		•							Add User 🛃	
			_					Q	Search grid data	
Last Name	Ŧ	First Name	T Emai	ail	T Client	T Channel	User Manager	Account Status	Search grid data	Last Updated
Last Name Q	Ŧ	First Name	T Emai	sil	Client Q	Channel	User Manager		_	
	٣		٩	ains@state.mn.us		Channel		Account Status	TT	Last Update
-	T	۹	Q jbra		Q	Q.		Account Status Q	TT	

\*Note: Turn on column filter to filer the column.

Or

- Type in the name you are looking for in the **Search grid data** text box.
  - A scroll bar will appear to the right of the grid if more users are available then what is displayed on the screen.

~ <mark>*</mark>			Admir	nistration Mode				4
User Management								<u>່</u> ວ [
User Filters								1-1-1
All Active Users	-					A	dd User 🚑	idi 🖊
						Q du	uck	8
Last Name	First Name	Email T	Client	Channel T	User Manager	Account Status	Υ Τ	Last Updated
۹	۹	Q	۹	۹	۹	Q	Q	
Duck	Daisy	daisy@test.com	Test Bank Newest Release	Homeownership		Active		03/14/2022
Duck	Donald	don@test.com	Test Bank Newest Release	Homeownership		Active		03/14/2022

• Double-click on the User that you would like to manage.

- Make any changes to the Security Groups and Departments
  - Departments always needs 1 Department to be Set as Default

Record selected Daisy Duck   daisy@test.com	Unsaved Changes	
Security Groups          Lending Partner         Lending Partner Admin         Lending Partner Associate         Lending Partner Read Only	Departments         Lender QC         Lending Partner (Default)         Loan Officer	
Select All 🗖 Deselect A	II Select All 🗖 Deselect All	Set as Default

• Select the **Save** icon in the top Right corner of the screen.



## Adding or Updating Licensing Information for a User

- Click on User Profile icon
- Click on Administration Mode (off) to access User Management.

🕋 🖬 💆 Q	Minnesota Housing Loan Commitment System
Announcements and Pipeline	User Settings
Announcements	Department   Lending Partner
No announcements.	C Admin Mode (off)
Pipeline Dashboard	A The search returned more than 1000 results. Refine the search criteria for more previse results.
All Loans C	Grid Views Default Pipeline Vista

- Select the user from the list of active users:
  - $\circ$   $\;$  Users that are not active can be found using User Filters: All Users.

* *						Administratior	Mode							
Jser Management														Ċ
User Filters All Active Users		•										Add	User 🛃	
			_								Q	Search	grid data	
Last Name	Ŧ	First Name	Ţ	Email	Ŧ	Client	Channel	T	User Manager	T			grid data	Last Updated
Last Name Q		First Name	Ţ	Email Q	Ŧ	Client Q	Channel Q		User Manager Q	T			-	
			Ţ		T	Chorn			-	T	Account Status		T	
۹		۹	Ţ	۹	T	Q	Q		-	٣	Account Status Q		T	Last Updated

\*Note: Turn on column filter to filer the column

Or

- Type in the name you are looking for in the **Search grid data** text box.
  - A scroll bar will appear to the right of the grid if more users are available then what is displayed on the screen.

* *			Adm	inistration Mode				
User Management								Ċ
User Filters								
All Active Users	-						Add User 🛃	jej 🕇
							Q duck	8
Last Name	First Name	Email T	Client	Channel T	User Manager	Account Status	T T	Last Updated
Q	Q	Q	Q	Q	Q	•	Q	
->	~	4	٩	٩	ų	Q	٩	
Duck	Daisy	daisy@test.com	Test Bank Newest Release	Homeownership	ų	Q Active	ч	03/14/2022

• Double-click on the User that you would like to manage.

• Select the Add License icon in the bottom right corner of the User Management screen

General Information Authentica	eneral Information Authentication Links Leanting							
							^	dd License 📰
State	License Number	Туре	Activation	Expiration	Active	Exempt	National	Actions

- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - o License Type
    - > Type NMLS will display Loan Officer's NMLS# on the documents
  - o License Number
  - State auto fills N/A when NMLS is selected
  - Activation Date (date user is added)
  - Expiration date (Enter 12/31/2099)
  - License Active is pre checked
  - o Click Add

Add License	×
	* Required Fields
License Type *	License Number *
NMLS -	651789
State	Activation Date *
N/A -	10/03/2021
Expiration Date * 12/31/2099	
License Active	License Exempt
Cancel	Add

• To modify License, click on the pencil in the Action column.

General Information	Authentication Links Licensing							
Record selected Keanu Reeves   ke	eanu.reeves@testbank.com							
							Add	License 📰
State	License Number	Туре	Activation	Expiration	Active	Exempt	National	Actions
N/A	78777777	NMLS	12/08/2021	12/31/2099	~		~	1

- Make any changes on the Edit License screen.
- Select the **Save** icon in the top Right corner of the screen.



• This notification will display:

~	<ul> <li>The changes were successful.</li> </ul>	
<u> </u>		

## **Username/Password Help**

- Users must be logged in to reset their own password and establish a security question
- Click on User Profile icon
- Click on User Settings

☆ □ ② Q	Minnesota Housing Loan Commitment System
Announcements and Pipeline	User Settings
Announcements	Department   Lending Partner
No announcements.	⑦ Admin Mode (off) I b Log Out
Pipeline Dashboard	A The search returned more than 1000 results. Refine the search criteria for more precise results.
Pipeline Filters	Grid Views
All Loans - 🕝	Default Pipeline Vista 🔹 📃 💙

- Add Recovery Question and Recover Answer (turned on the eye to see text)
- Typed Current Password and New Password twice
- Click Save

Over Settings	×
My Profile	Password / Security
Password Recovery	
Change Recovery Question	
Recovery Question	
Favorite football team	
Recovery Answer	
Vikings	۲
Change Password	
Change Password	
Current Password	
Password1231	۲
New Password	
Password1234I	۲
Confirm Password	
Password 1234I	۲
Must match password above.	
	Cancel Save

• This notification will display:

|--|