



# **Web Administrator System Guide**

*August 11, 2023*

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## 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.*

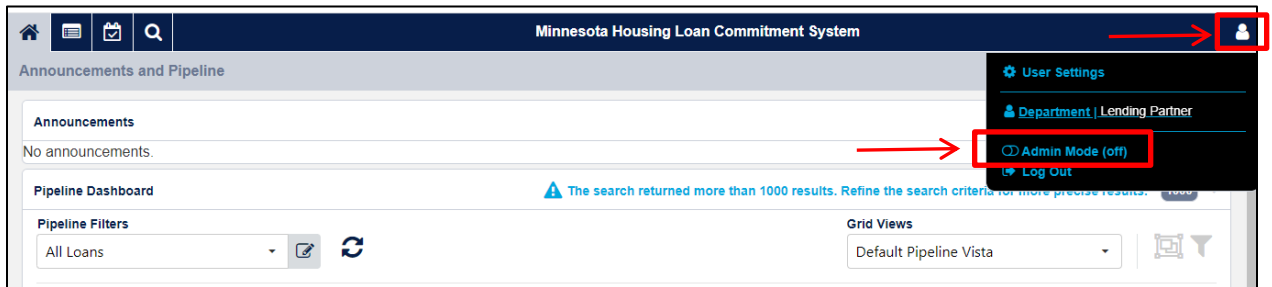
## Setting up a New User

- Log into the [Online Commitment System](#).

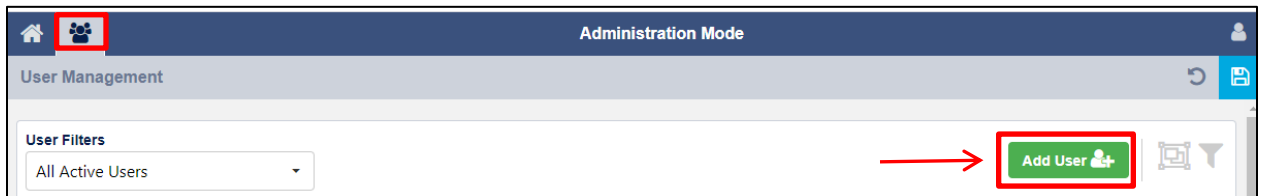
After login into the Online Commitment System, the initial landing page will be the **Announcements and Pipeline** screen.

### To create a New User

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



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



- 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.
  - First Name
  - Last Name
  - 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.

The screenshot shows the 'New Blank User' form with the following fields and values:

- Account Status:** Account Active (highlighted in red)
- Account Expiration:** 12/08/2021
- First Name:** Keanu (highlighted in red)
- Last Name:** Reeves (highlighted in red)
- Middle Name:** (empty)
- Email Address:** keanu.reeves@testbank.com (highlighted in red)
- Work Phone:** (651) 296-0000 (highlighted in red)
- Ext:** (empty)
- Fax Number:** ( ) \_-\_\_ (empty)
- Client:** Test Bank Version 1.1.2.55 (highlighted in red)
- Channel:** Homeownership (highlighted in red)
- Position:** Select...
- Commission %:** 0.000%
- User's Manager:** (empty dropdown)
- 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.

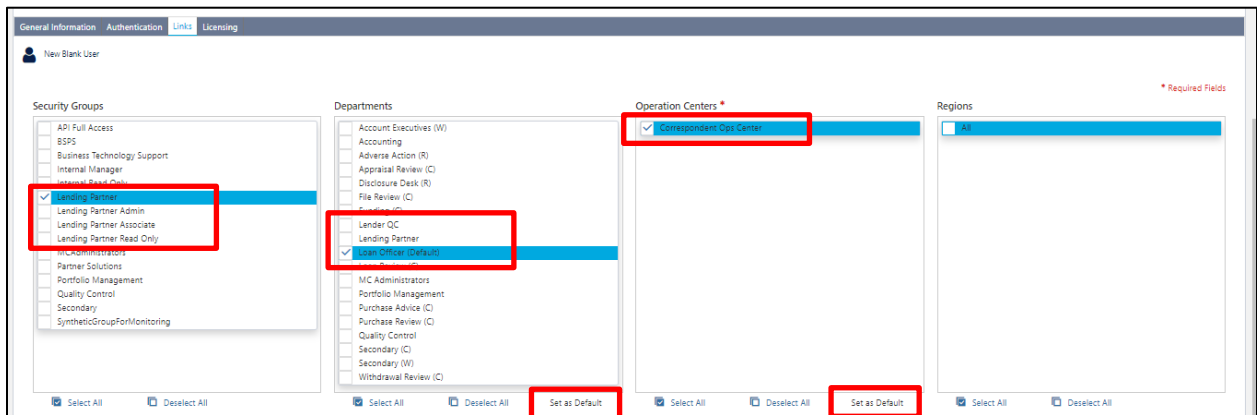
The screenshot displays the 'Authentication' tab for a 'New Blank User'. The form includes the following fields:

- Username:** example@lender.com (highlighted with a red box)
- Password:** [Redacted with asterisks] (highlighted with a red box)
- Multi-Factor Email:** example@lender.com (highlighted with a red box)
- Multi-Factor Phone:** 1234567890 (highlighted with a red box)
- Multi-Factor SMS Provider:** Verizon (highlighted with a red box)
- SSO Status:** SSO Inactive (selected)
- SSO Username:** [Empty]
- PowerBI Username:** [Empty]

A red asterisk icon and the text 'Required Fields' are visible in the top right corner of the form area.

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



- 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



- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - License Type
    - Type NMLS will display Loan Officer’s NMLS# on the documents
  - 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

The screenshot shows the 'Add License' form. It has a title bar with 'Add License' and a close button. Below the title bar, there is a red asterisk and the text '\* Required Fields'. The form contains several fields:
 

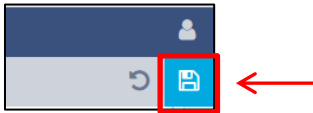
- 'License Type \*': A dropdown menu with 'NMLS' selected, highlighted with a red box.
- 'License Number \*': A text input field containing '651789', highlighted with a red box.
- 'State \*': A dropdown menu with 'N/A' selected.
- 'Activation Date \*': A date picker field containing '10/03/2021', highlighted with a red box.
- 'Expiration Date \*': A date picker field containing '12/31/2099', highlighted with a red box.
- 'License Active': A checked checkbox.
- 'License Exempt': An unchecked checkbox.

 At the bottom of the form, there is a 'Cancel' button on the left and an 'Add' button on the right, which is highlighted with a red box.

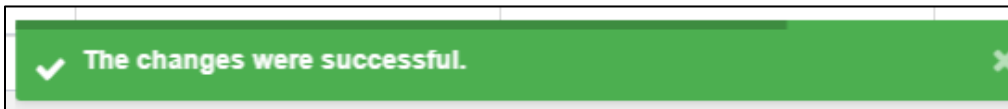
- Select the **Add License** icon again to add multiple License numbers.



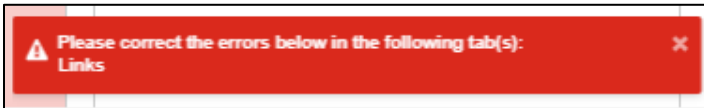
- Once all fields have been completed, select the **Save** icon in the top Right corner of the screen to complete the New User account.



- If done correctly, the following notification will display:

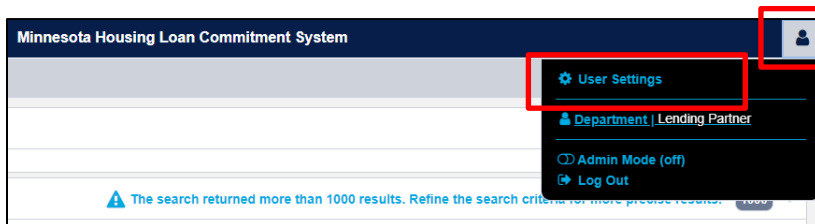


- If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.

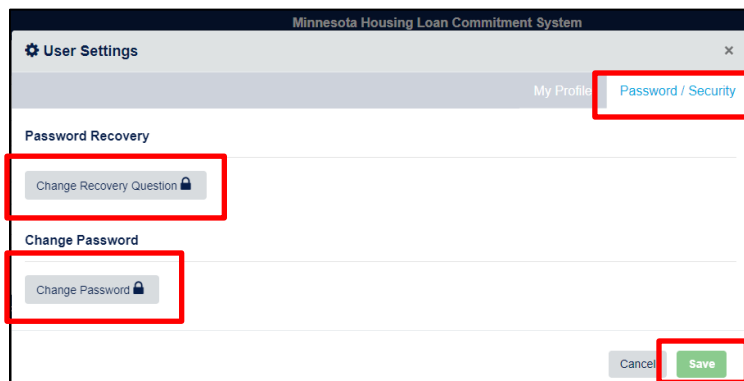


*Recommendation: Test the new user. Log in as the new user if able to login, email new user their username and password.*

- 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.



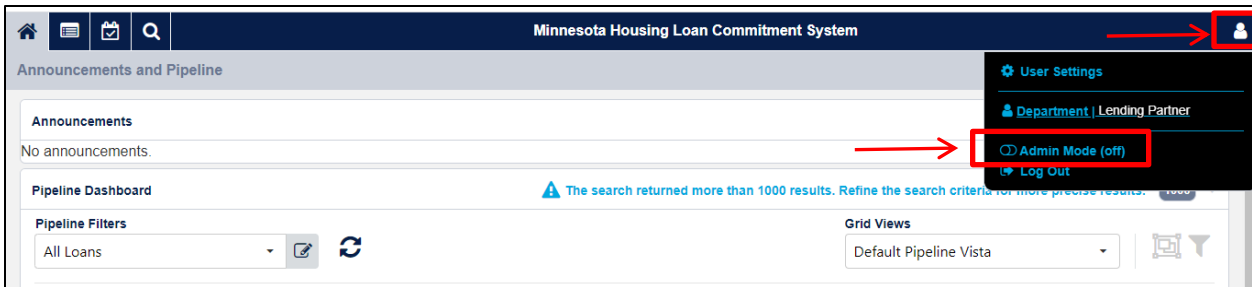
- Select “Password/Security” tab.
- Set up a new password and username/password recovery question.



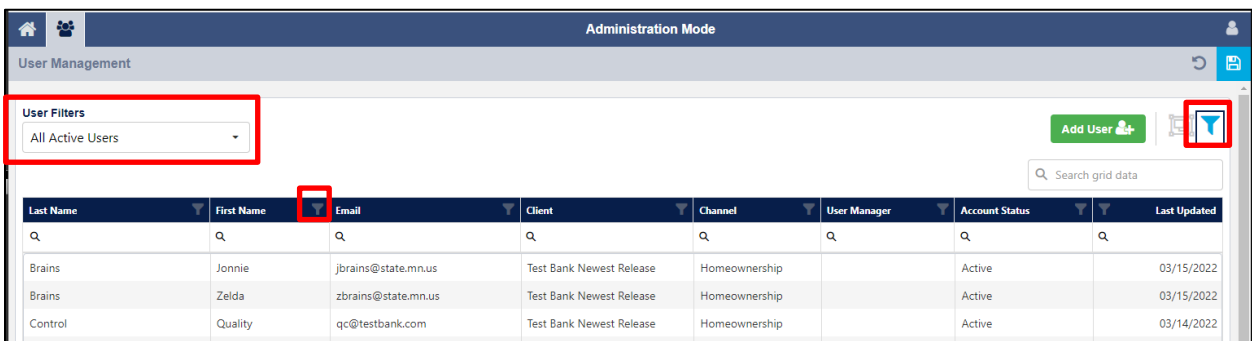
## Managing a User

### To manage a current user

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



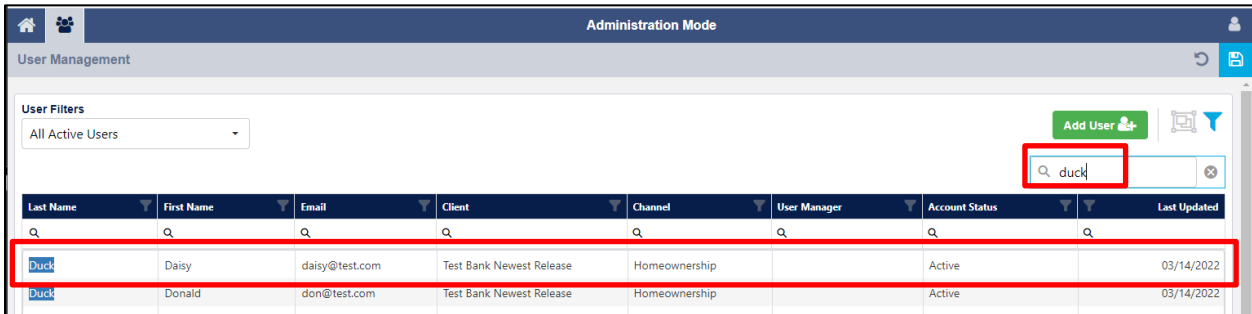
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

### Or

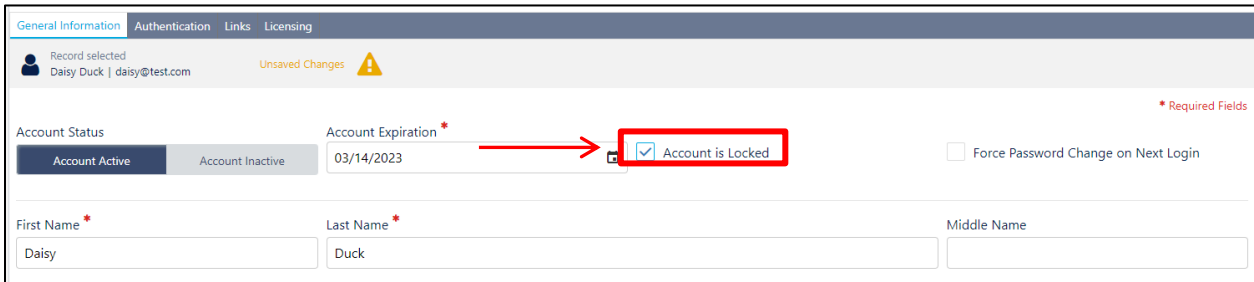
- Type in the name you are looking for in the **Search grid data** text box.
  - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



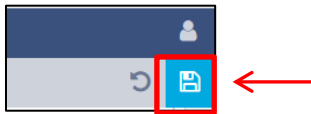
- Double-click on the User that you would like to manage.

- **Locked Account**

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

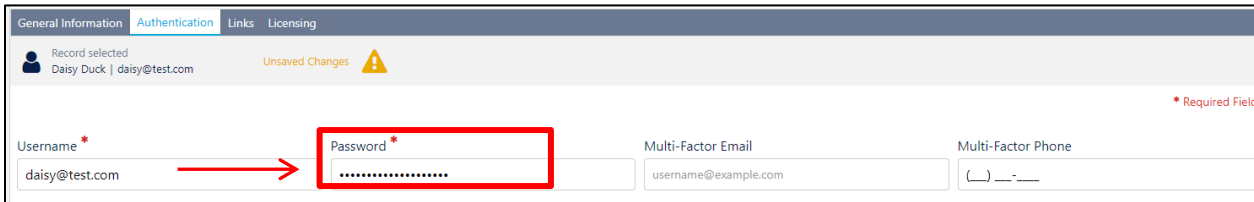


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

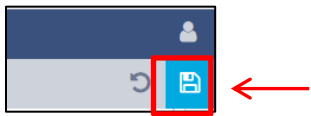


- **Password Reset**

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

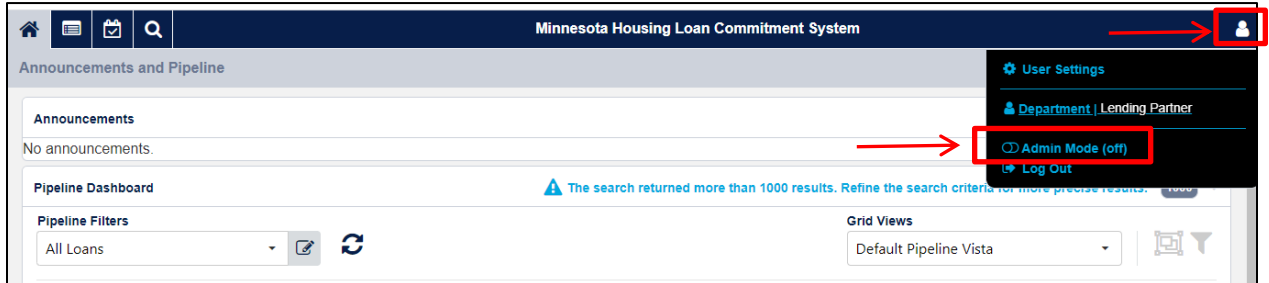


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

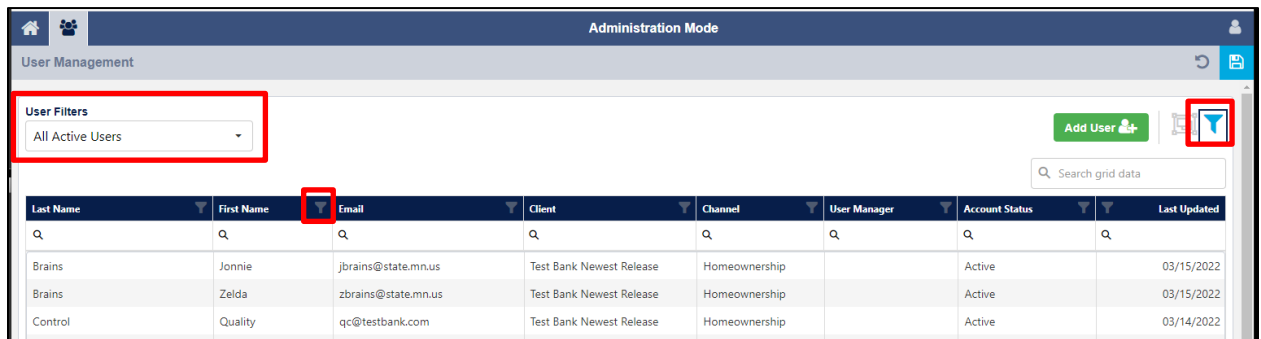


## Adding a User to a New Group or Department

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



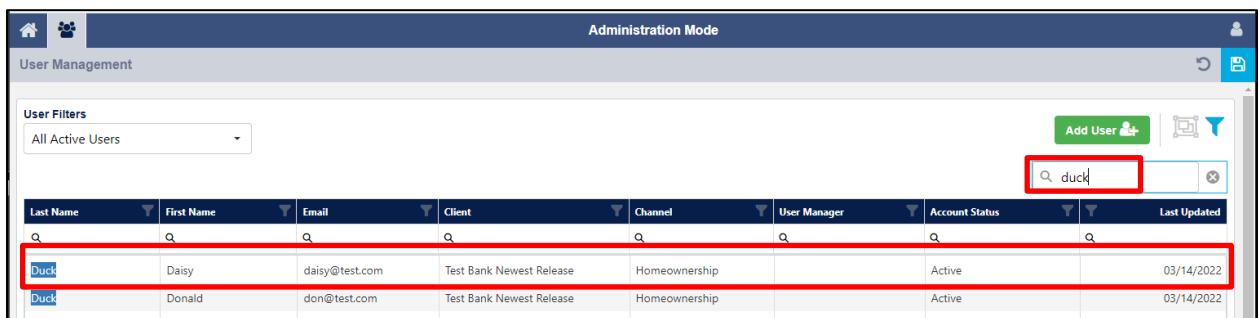
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

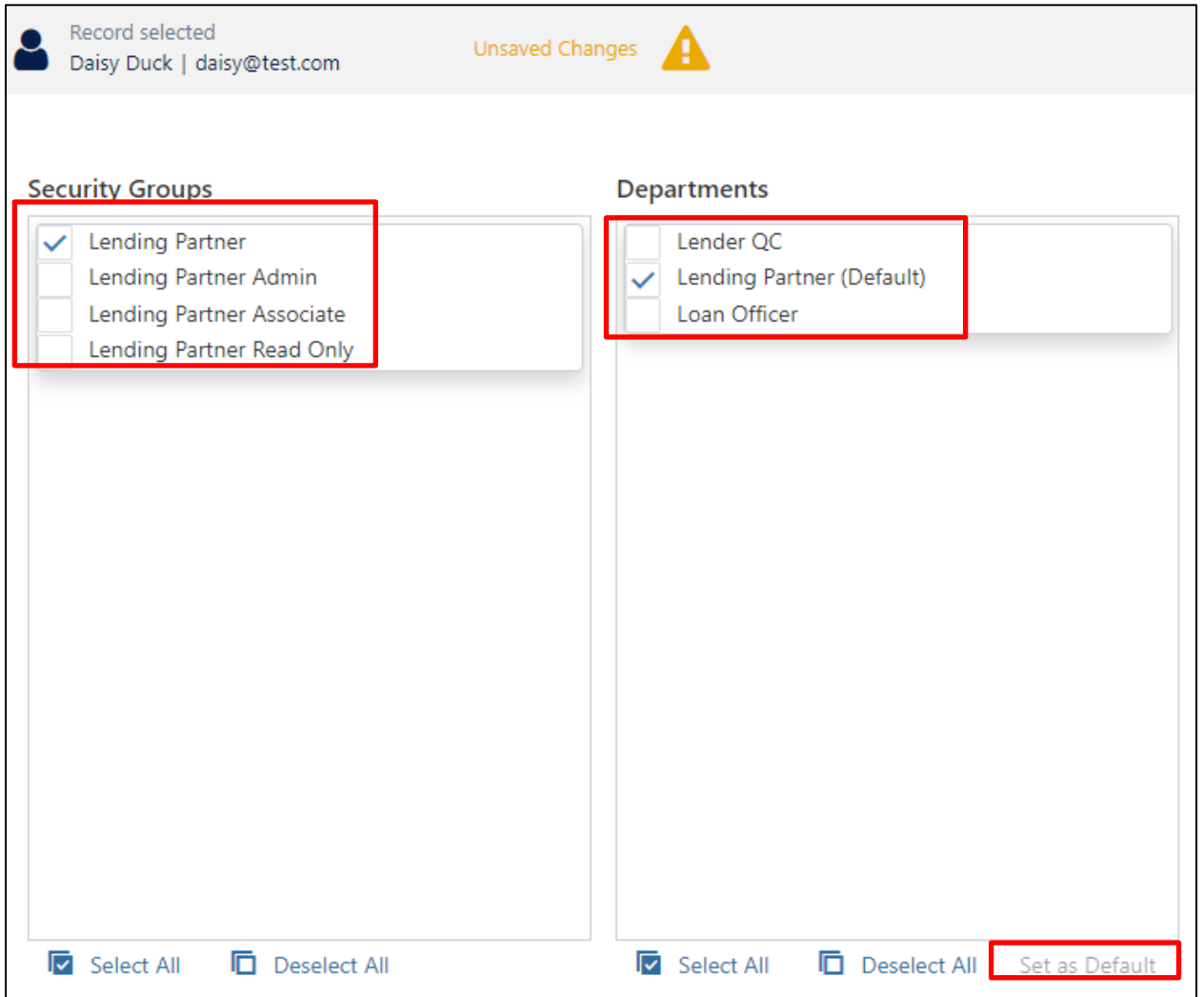
Or

- 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 than what is displayed on the screen.

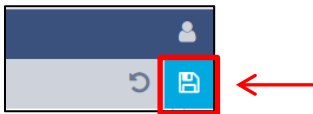


- Double-click on the User that you would like to manage.

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

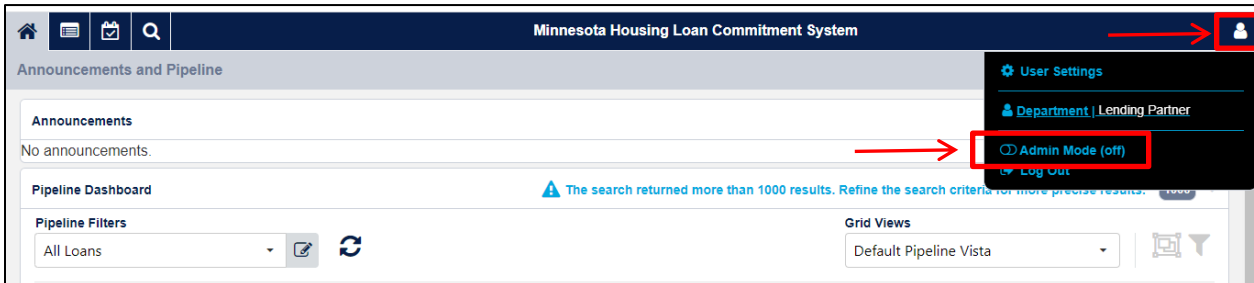


- Select the **Save** icon in the top Right corner of the screen.

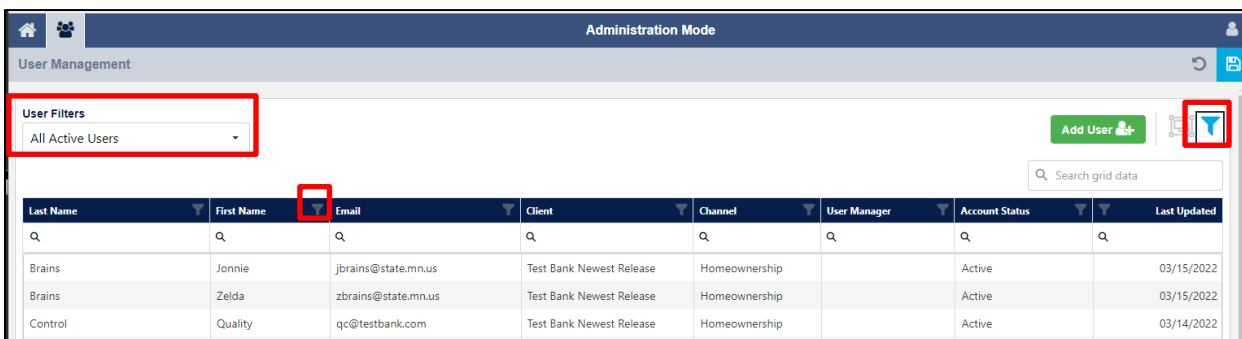


## Adding or Updating Licensing Information for a User

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



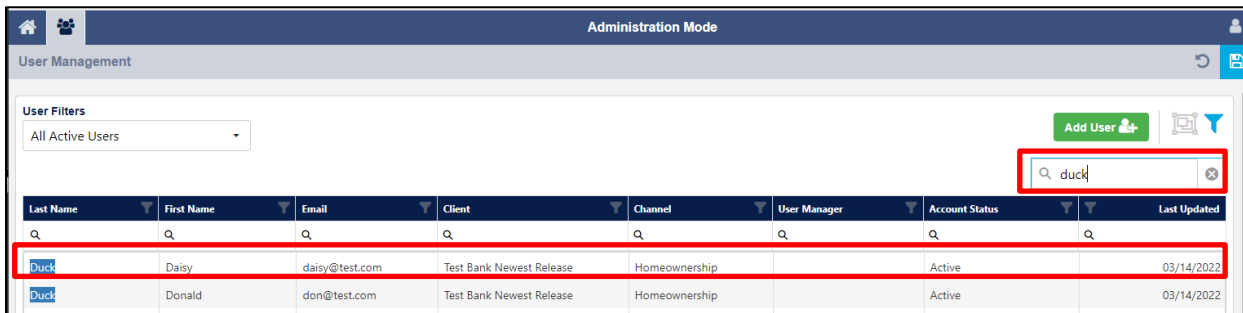
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

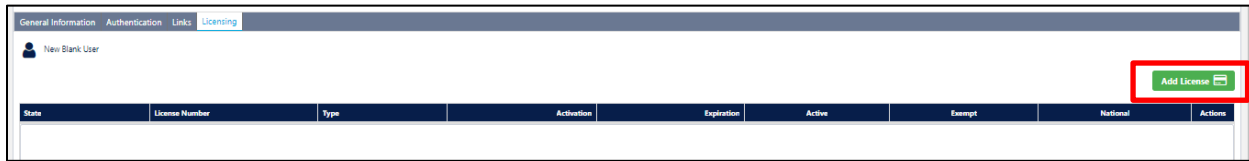
Or

- 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 than what is displayed on the screen.

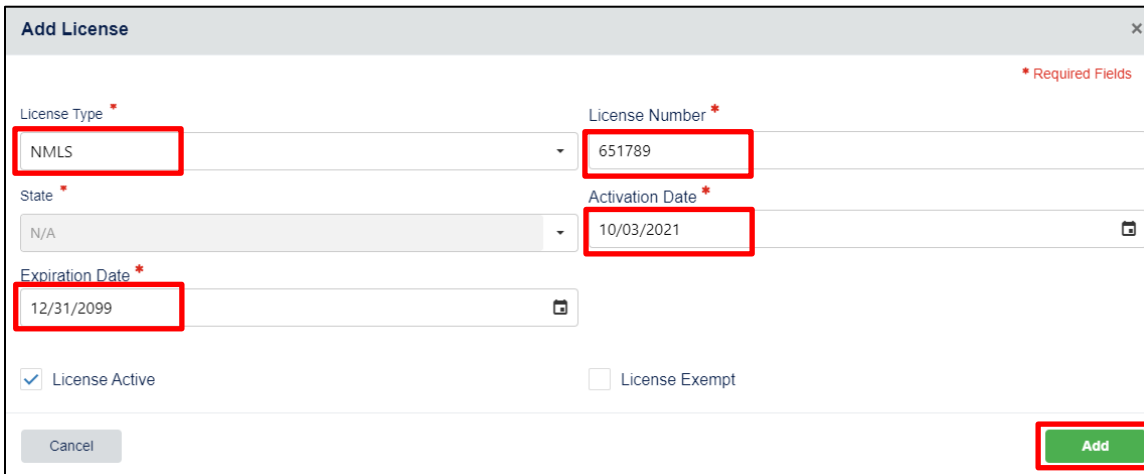


- Double-click on the User that you would like to manage.

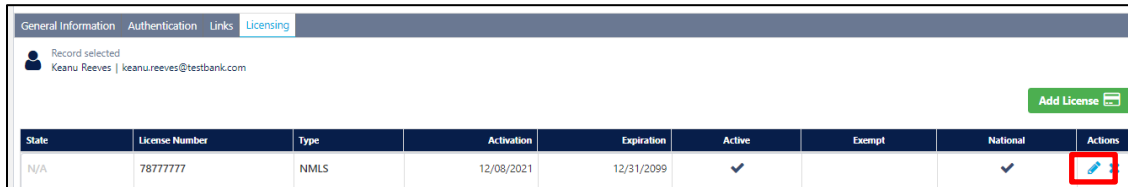
- Select the **Add License** icon in the bottom right corner of the User Management screen



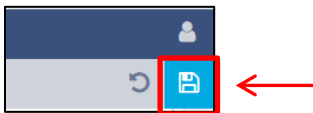
- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - License Type
    - Type NMLS will display Loan Officer’s NMLS# on the documents
  - License Number
  - State auto fills N/A when NMLS is selected
  - Activation Date (date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



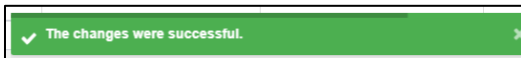
- To modify License, click on the pencil in the Action column.



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

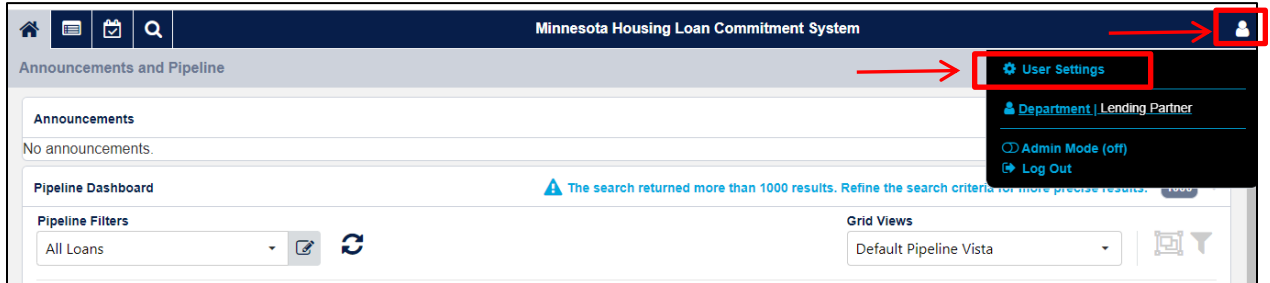


- This notification will display:



## 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**



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

- This notification will display:

