



# **Web Administrator System Guide**

*April 22, 2019*

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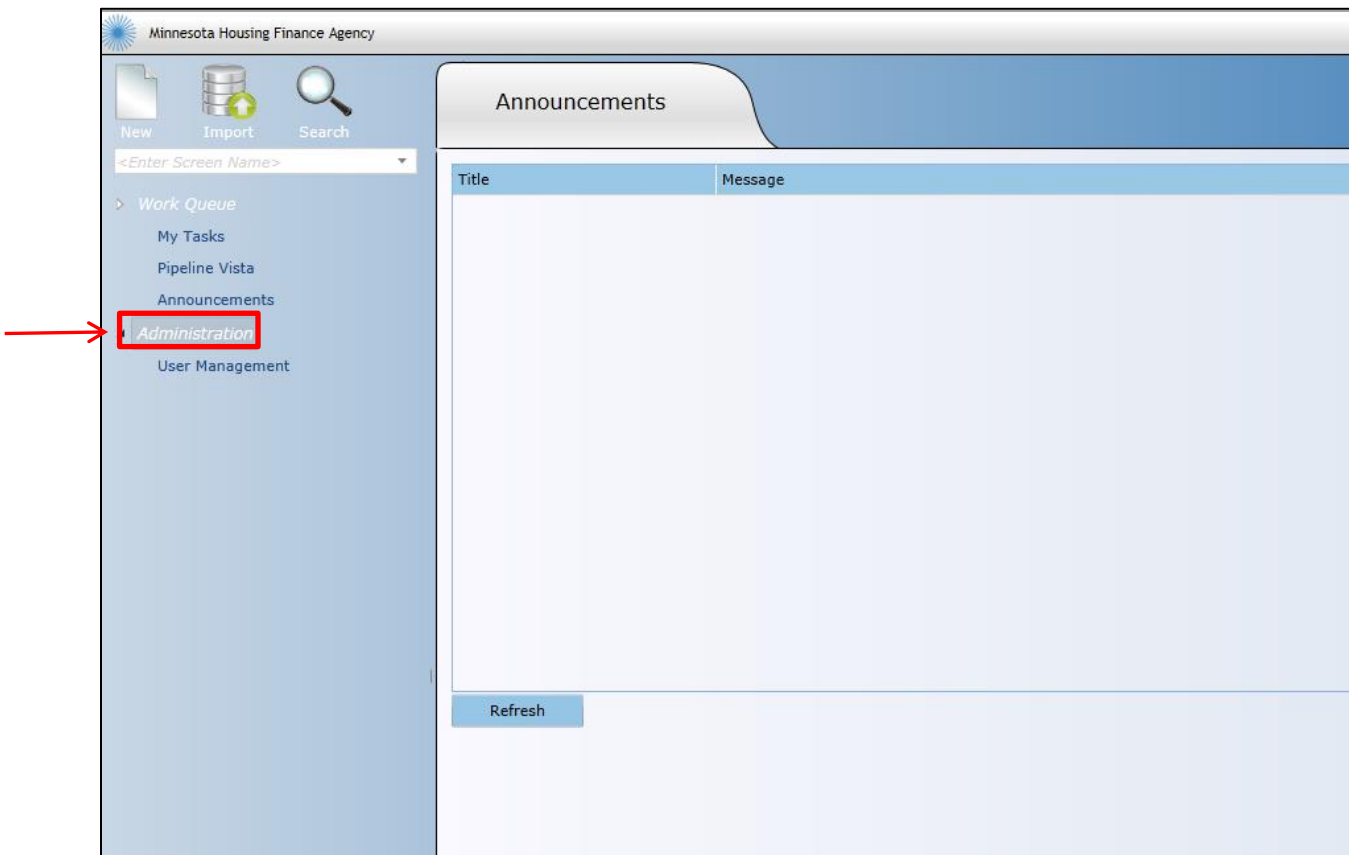
## Setting up a New User

- Log into the Online Commitment System.

After logging into the Online Commitment System, the initial landing page will be the **Announcements** page.

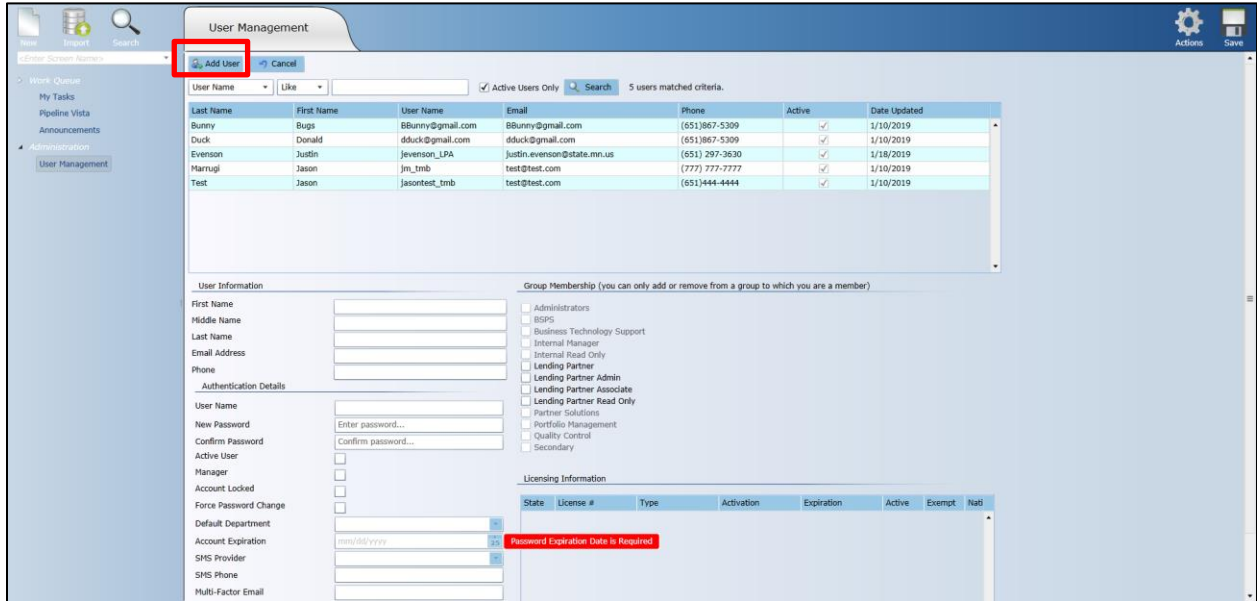
### To create a New User

- Click on **Administration** to access **User Management**.



- Select the **Add User** icon in the top Left corner of the page.

**\*Note:** You will not be able to enter information in the corresponding fields until this icon is selected.



- Complete the following fields under **User Information**
  - First Name
  - Last Name
  - Email Address
  - Phone Number



- Select appropriate boxes to assign to the new user under **Group Membership**
  - **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.

Group Membership (you can only add or remove from a group to which you are a member)

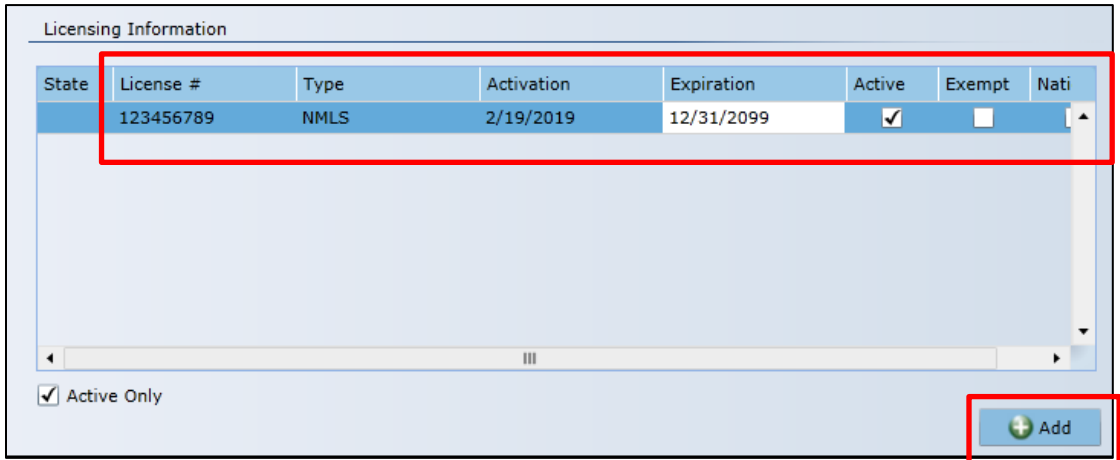
- Administrators
- BSPS
- Business Technology Support
- Internal Manager
- Internal Read Only
- Lending Partner
- Lending Partner Admin
- Lending Partner Associate
- Lending Partner Read Only
- Partner Solutions
- Portfolio Management
- Quality Control
- Secondary

- Create an original User Name and Password in the fields under “Authentication Details:
  - User Name should be set as the person’s email address
  - 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
  - Check the Active User box
  - Default Department: Lending Partner ; **or**
  - Default Department: Loan Officer (allows the Loan Officer name to be selected)
  - The account expiration date should be two years from the current date

User Information	
First Name	John
Middle Name	A
Last Name	Smith
Email Address	johnsmith@testemail.com
Phone	(612)222-2222
Authentication Details	
User Name	johnsmith@testemail.com
New Password	*****
Confirm Password	*****
Active User	<input checked="" type="checkbox"/>
Manager	<input type="checkbox"/>
Account Locked	<input type="checkbox"/>
Force Password Change	<input type="checkbox"/>
Default Department	Lending Partner
Account Expiration	2/19/2021
SMS Provider	
SMS Phone	
Multi-Factor Email	
Manager Selection	
User's Manager	

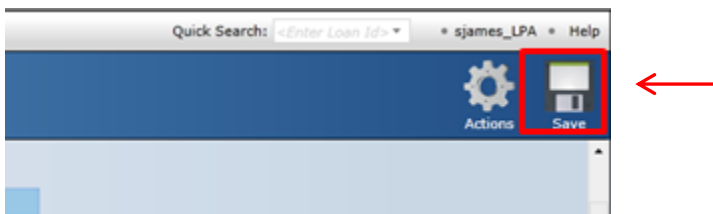
**\*Note:** SMS Provider, SMS Phone, Multi-Factor Email and User’s Manager are not required fields.

- Select the **Add** icon in the bottom right corner of the User Management screen and add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - License #
  - Type NMLS will display Loan Officer’s NMLS# on the documents
  - Activation Date (date user is added)
  - Expiration date (enter 12/31/2099)
  - Check “Active” box

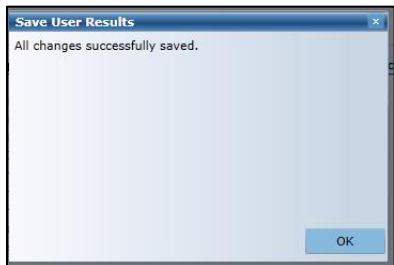


**\*Note:** State filed is not required.

- Select the **Add** 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.



You will receive the following notification when all changes have been saved:

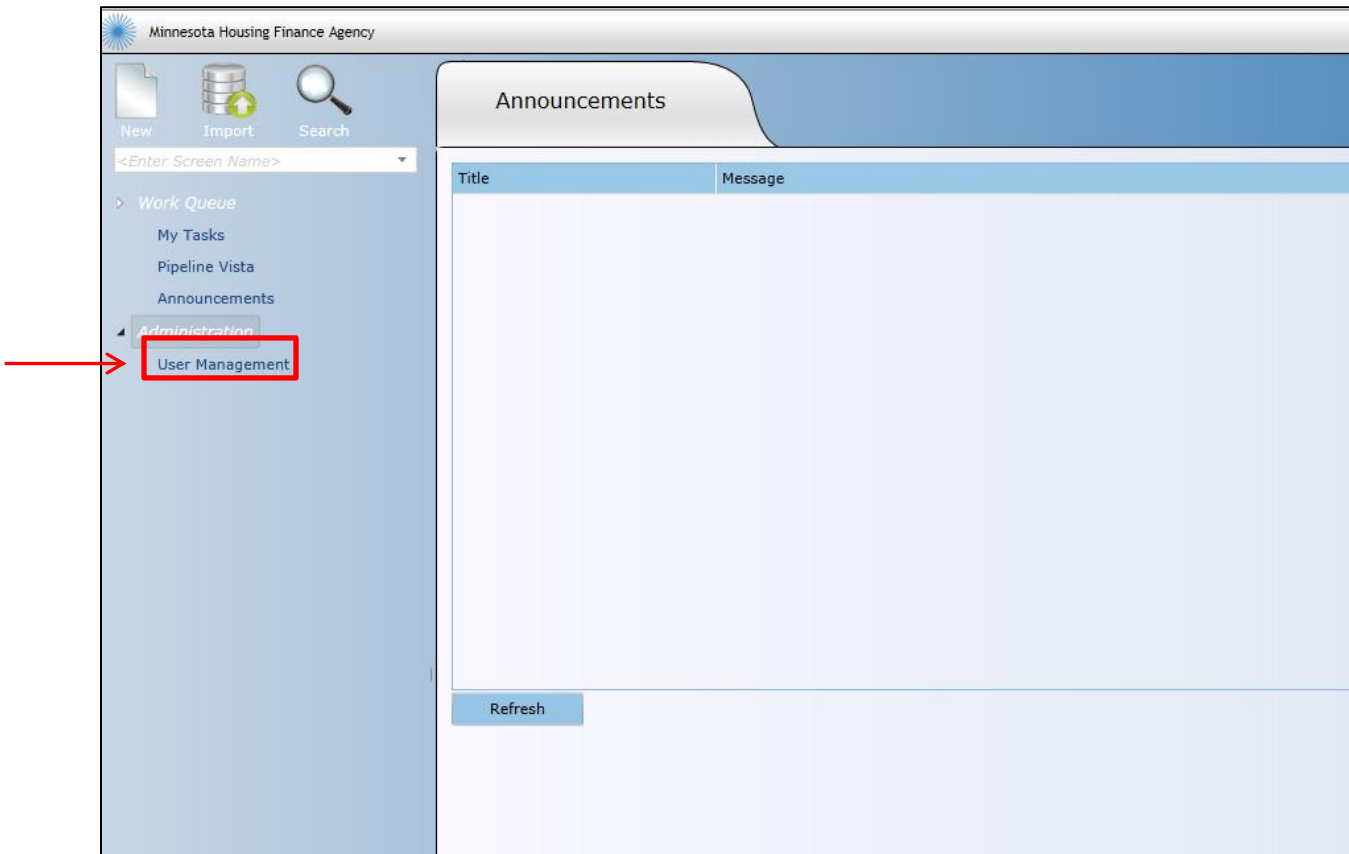


## Managing a User

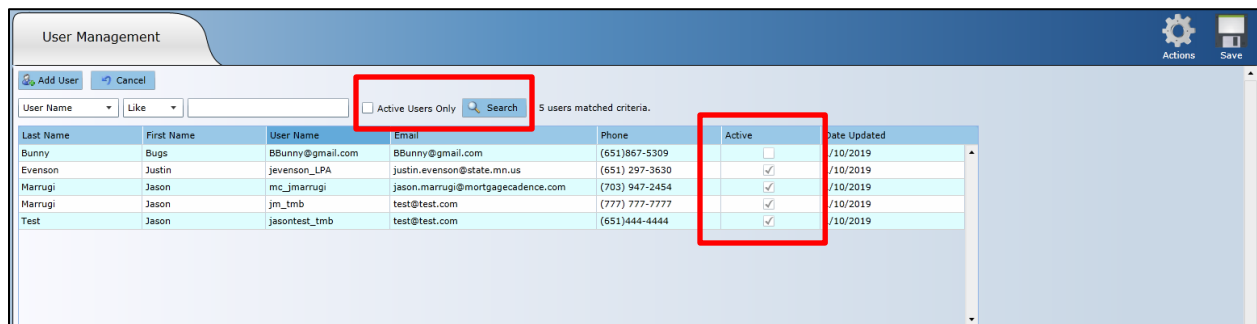
After logging into the Online Commitment System, the initial landing page will be the **Announcements** page.

To manage a current user

- Select **User Management**.



- Select the user from the list of active users:
  - Active users will be indicated by a checkmark in the active box.
  - Users that are not active can be found using the search button after unchecking the **Active Users Only** box.



**\*Note:** You can search for users using the search box at the top of the screen.



- Select either **User Name** or **User Last Name** from the dropdown menu. Then, type in the name you are looking for and select the **Search** icon.

The screenshot shows a search interface with the following elements:

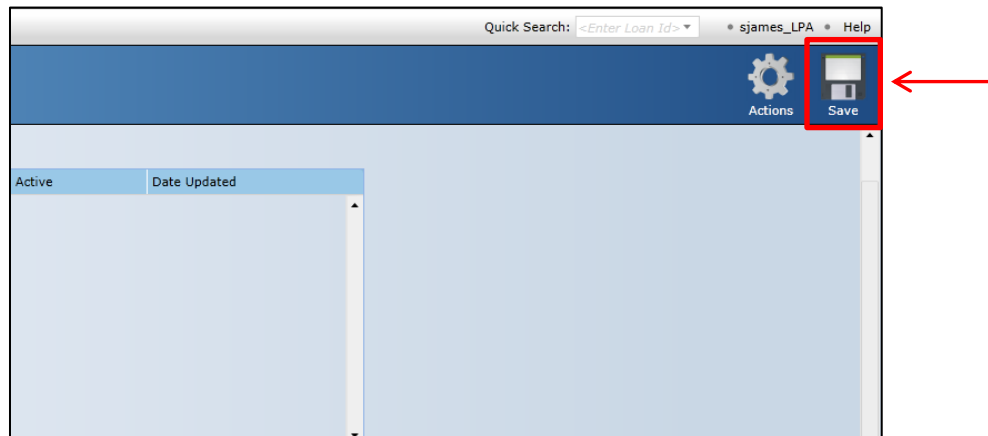
- Buttons: Add User, Cancel
- Search criteria: User Last Name (dropdown), Like (operator), smith (input field)
- Checkbox:  Active Users Only
- Search button: Search
- Feedback: 1 users matched criteria.
- Table with columns: Last Name, First Name, User Name, Email, Phone, Active, Date Updated
- Table row: Smith, John, jsmith, johnasmith@testmail.com, (651)555-1234, , 4/23/2018

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

The screenshot displays a user management form with the following fields and options:

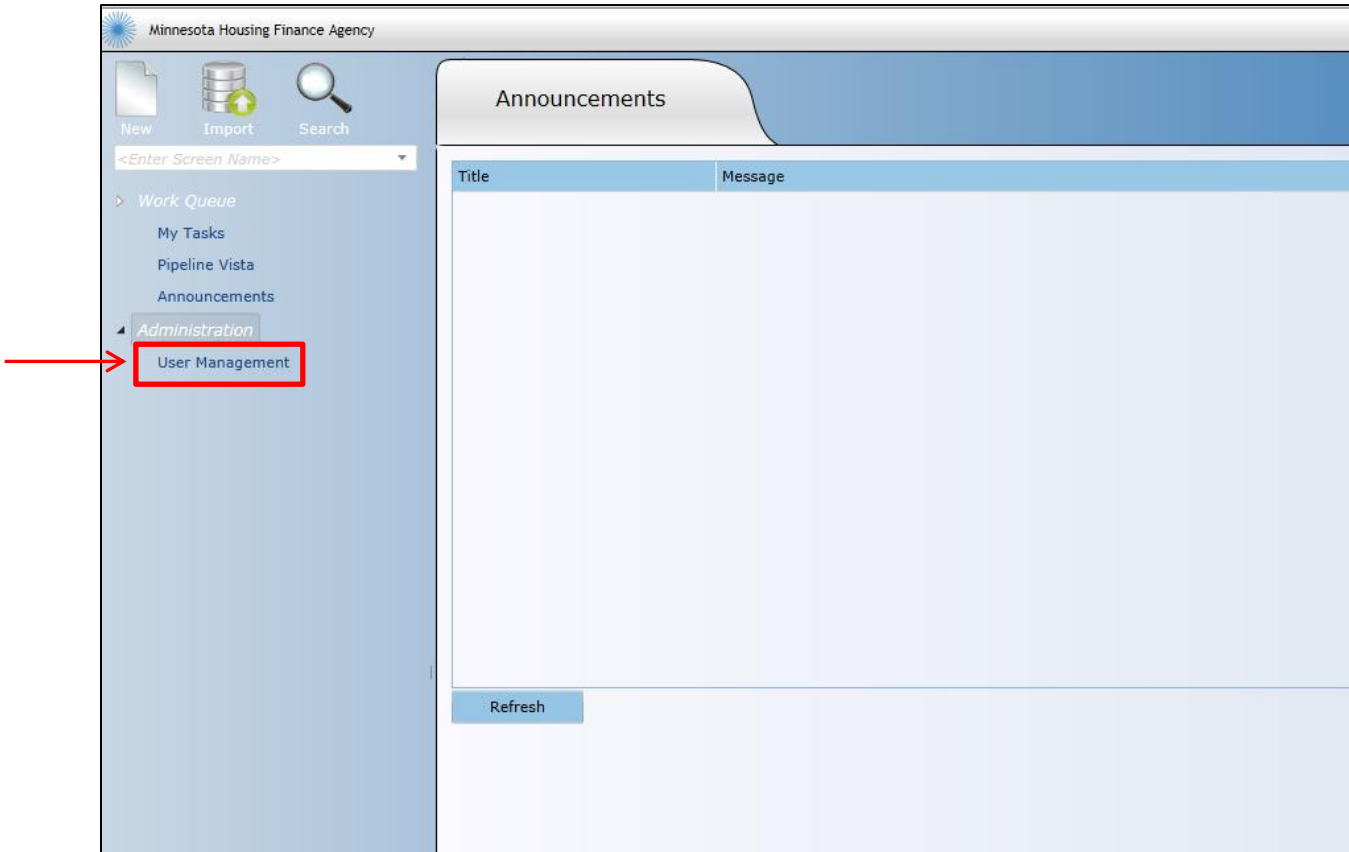
- Authentication Details** (Section Header)
- User Name: johnasmith@testemail.com
- New Password: \*\*\*\*\*
- Confirm Password: \*\*\*\*\*
- Active User:
- Manager:
- Account Locked:
- Force Password Change** (Section Header):
- Default Department: Lending Partner
- Account Expiration: 2/19/2021
- SMS Provider: [Dropdown]
- SMS Phone: [Text Field]
- Multi-Factor Email: [Text Field]
- Manager Selection
- User's Manager: [Dropdown]

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

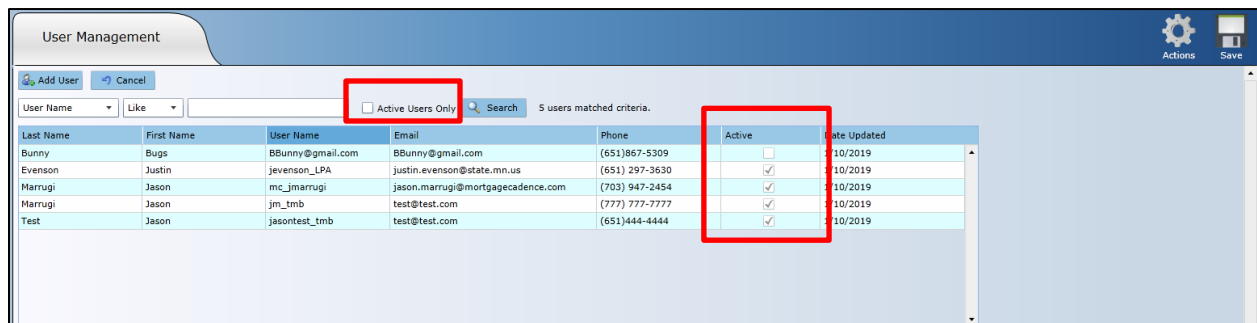


## Adding a User to a New Group

- Select the user from the list of active users:
- Select **User Management**.



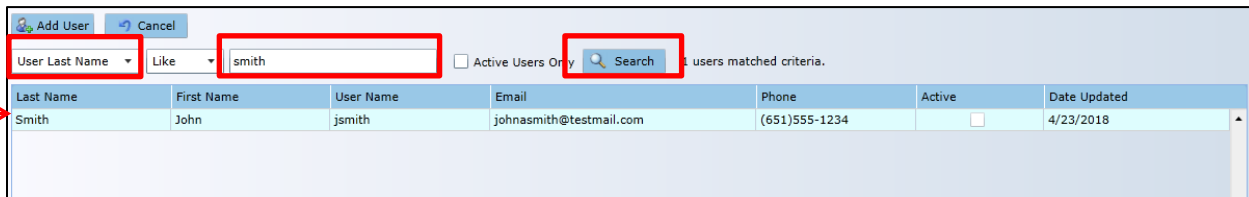
- Select the user from the list of active users:
  - Active users will be indicated by a checkmark in the active box.
  - Users that are not active can be found using the search button after unchecking the **Active Users Only** box.



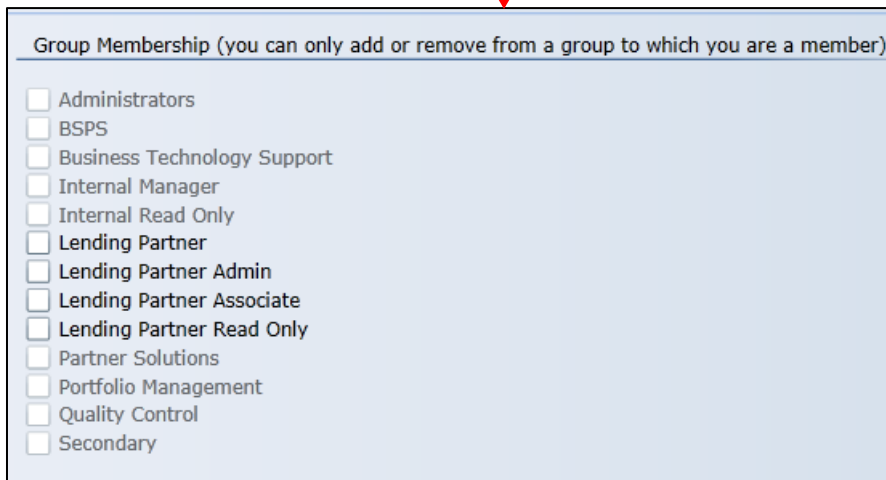
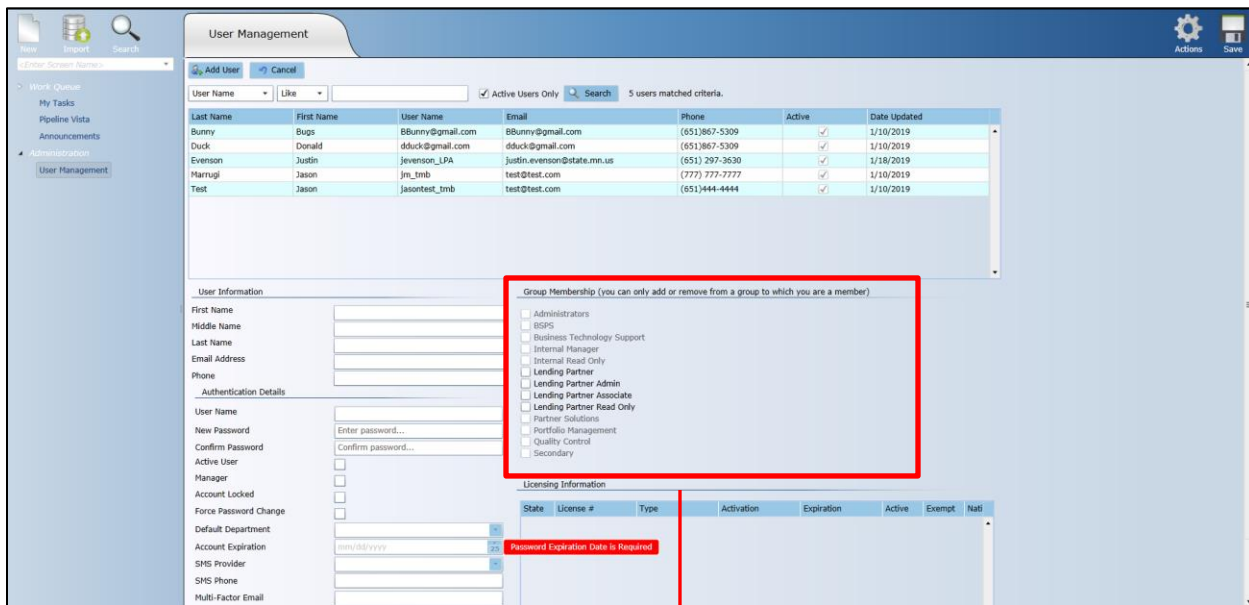
Note: You can search for users using the search box at the top of the screen.

- Select either **User Name** or **User Last Name** from the dropdown menu.

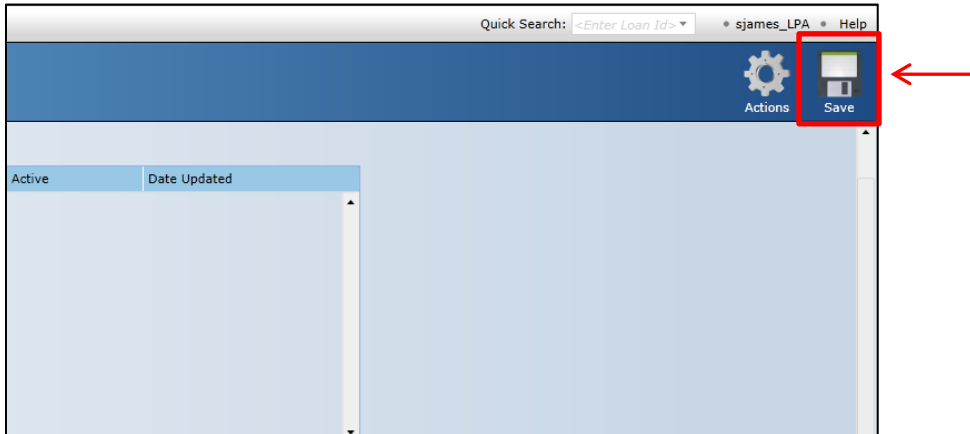
- Type in the name you are looking for and select the **Search** icon.



- Double-click on the User that you would like to manage.
- Select the boxes for the Group that the User is being added to:

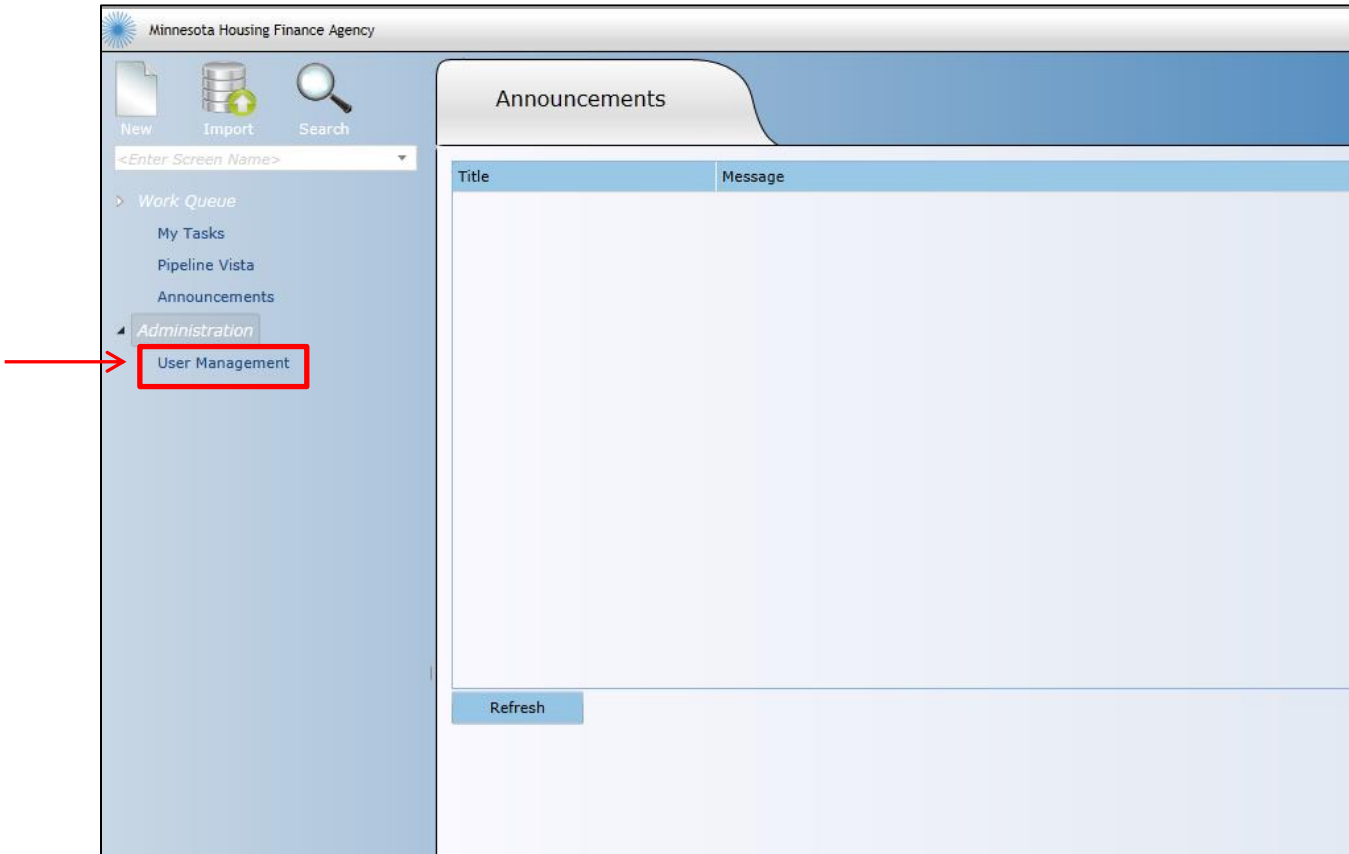


- Select the **Save** icon in the top Right corner of the screen.

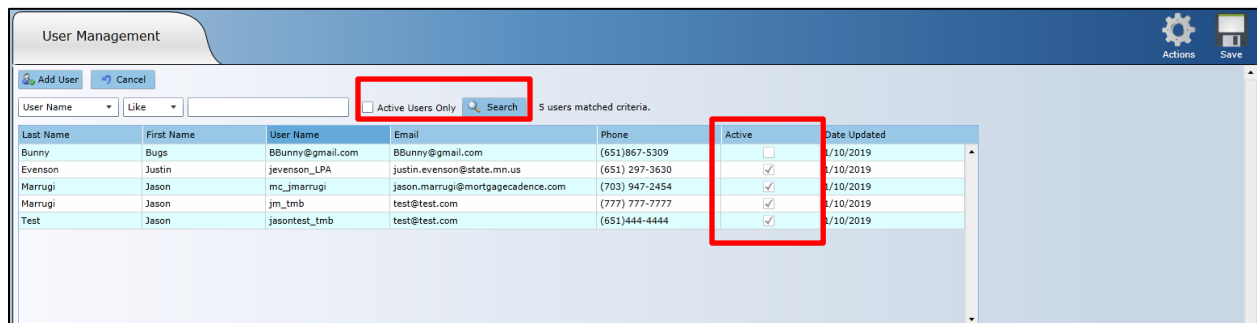


## Adding or Updating Licensing Information for a User

- Select **User Management**.



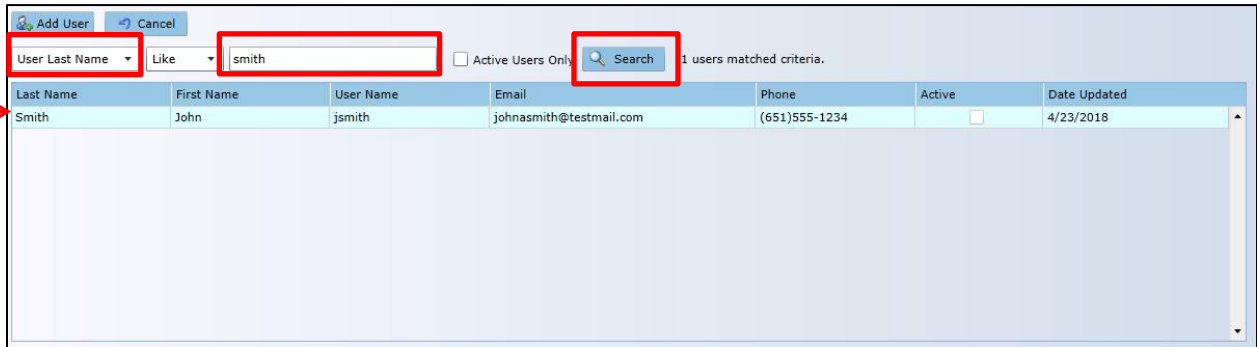
- Select the user from the list of active users:
  - Active users will be indicated by a checkmark in the active box.
  - Users that are not active can be found using the search button after unchecking the **Active Users Only** box.



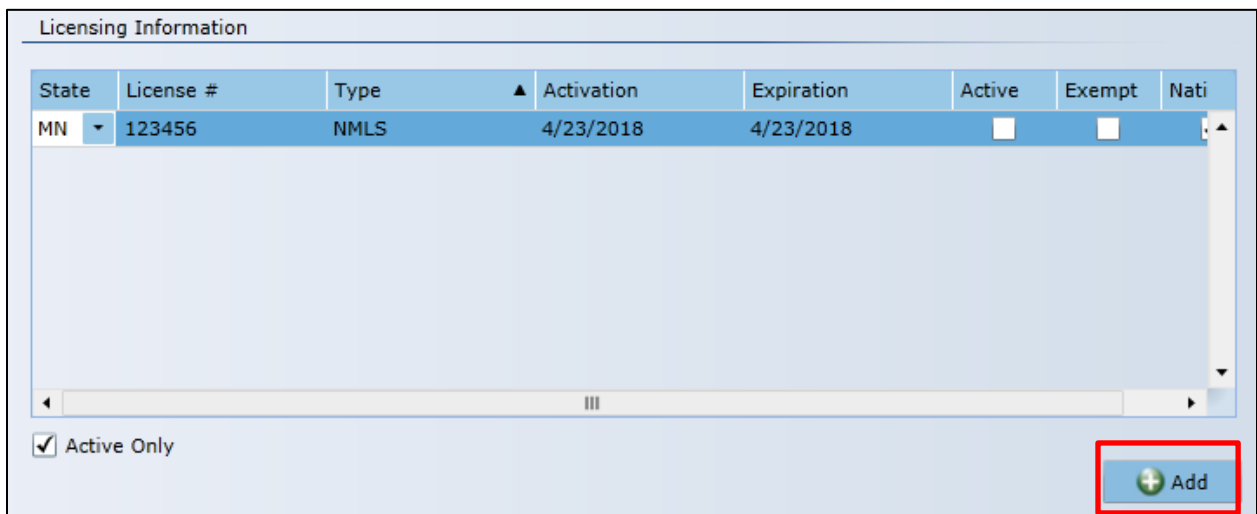
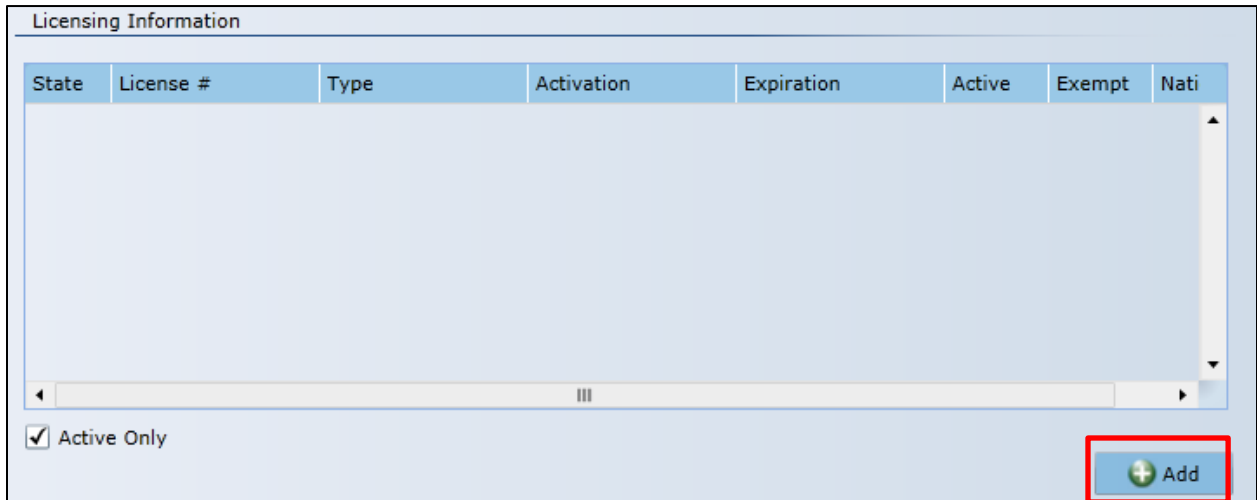
Note: You can search for users using the search box at the top of the screen.

- Select either **User Name** or **User Last Name** from the dropdown menu.

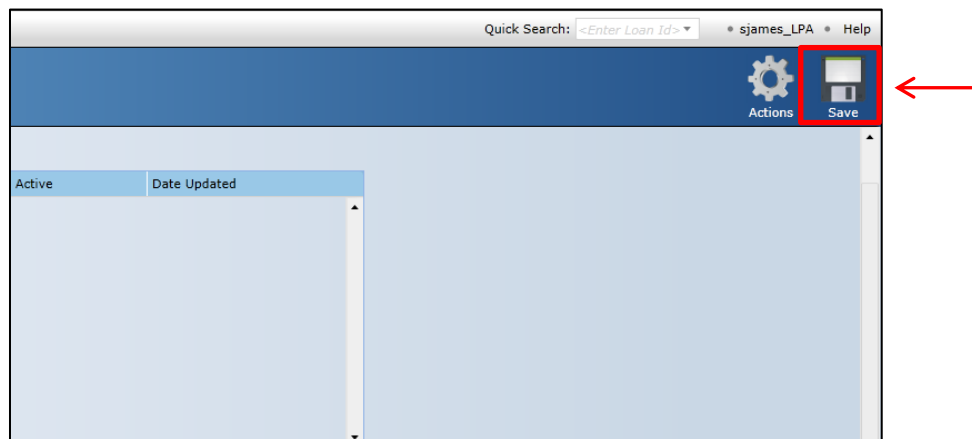
- Type in the name you are looking for and select the **Search** icon.



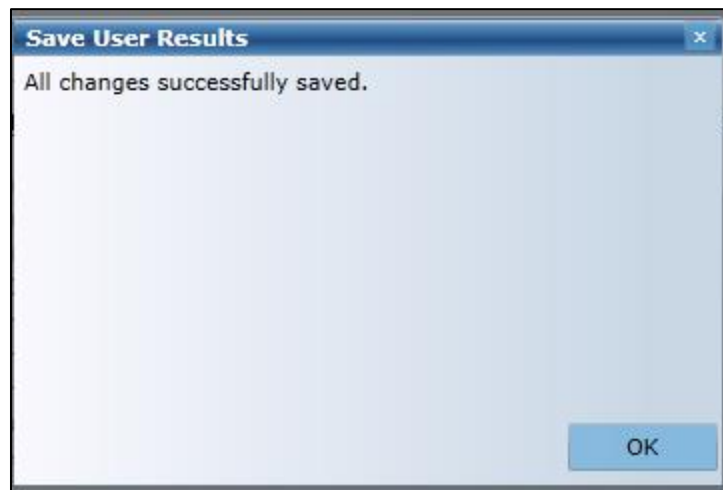
- Double-click on the User that you would like to manage
- Select the **Add** icon in the bottom right corner of the **User Management** screen.



- Add the following required Licensing Information to the existing user. Click on the fields to select options for the dropdown menu:
  - License #.
  - Type (i.e. NMLS).
  - Activation Date (date user is added).
  - Expiration date (enter 12/31/2099).
  - Check “Active” box.
  - Select the **Add** 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 changes to the User account.



You will get this notification when all changes have been saved:





## Username/Password Help

- Users can reset their own password if they establish a security question and click the **Username/Password Help** link on the login page.



- To reset a Password

- Select the box for **Force Password Change** under **Authentication Details**.
- Type a new original password in the **New Password** and **Confirm Password** fields.