



Web Administrator System Guide

July 8, 2020

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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 “Default Department” **and** a “User Security Group” to every user profile.

Default Department

Assign users a Default Department 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.

User Security Group

Assign users a User Security Group, 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 User Security Groups have access to order documents.

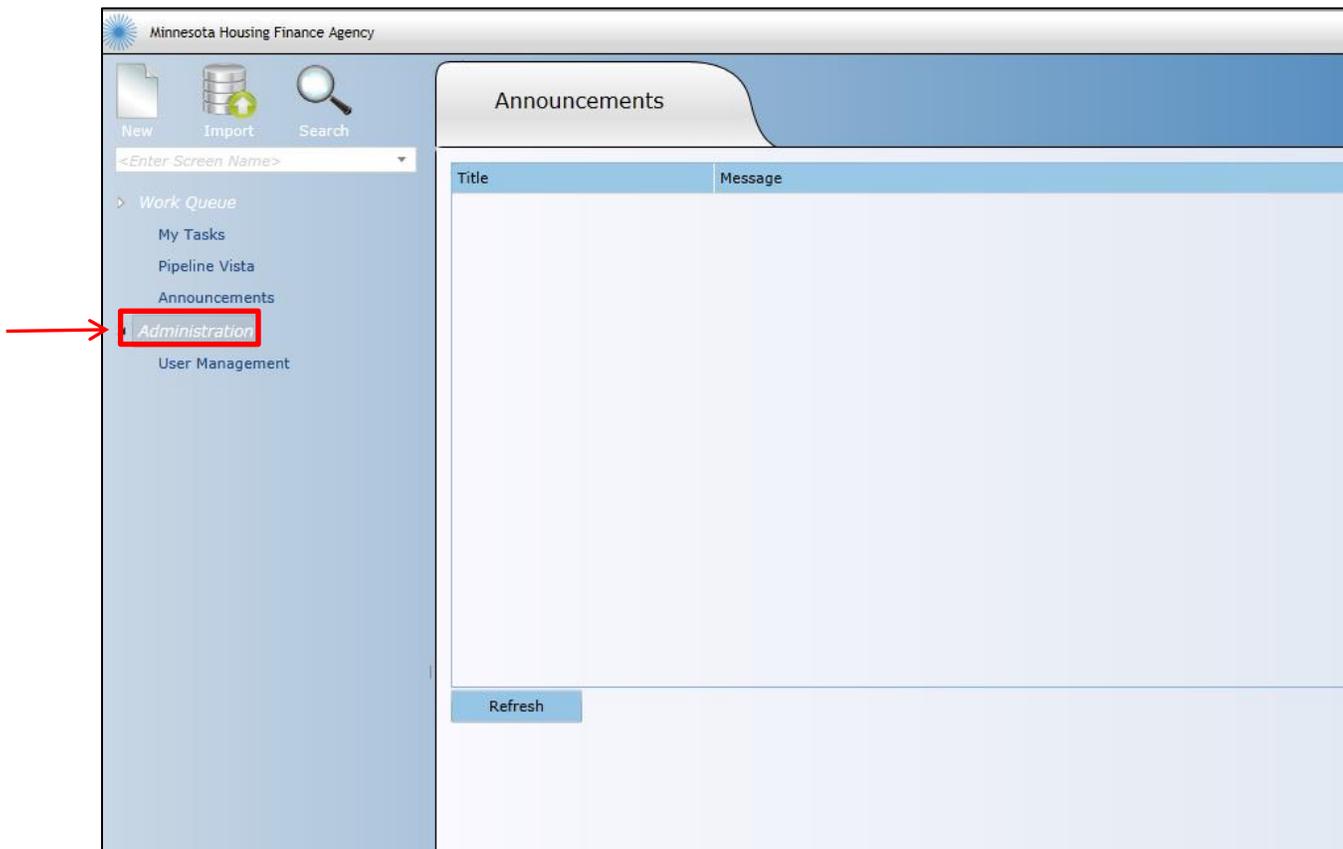
Setting up a New User

- Log into the Online Commitment System.

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

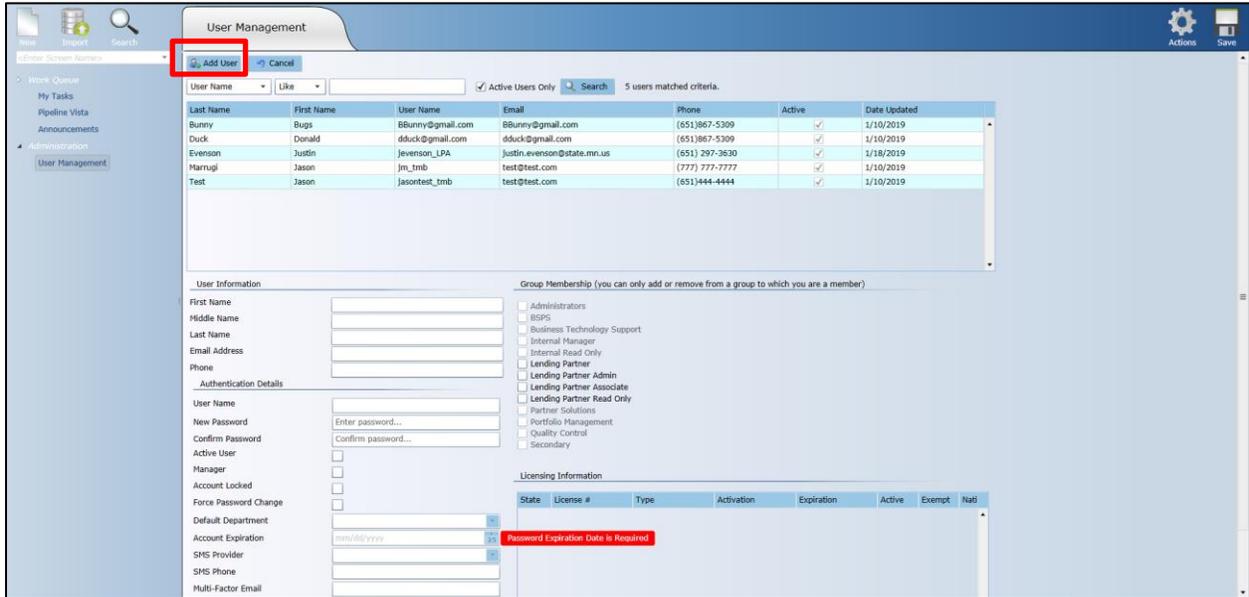
To create a New User

- 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
- Select a Default Department:
 - Lending Partner (underwriter, processor, closer, lock desk, etc.)
 - Loan Officer (allows the Loan Officer name to be selected)
 - Lender QC (closer, post closer, etc.)
- 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:

Manager:

Account Locked:

Force Password Change:

Default Department: Lending Partner

Account Expiration: 2/19/2021

SMS Provider: [Dropdown]

SMS Phone: [Text]

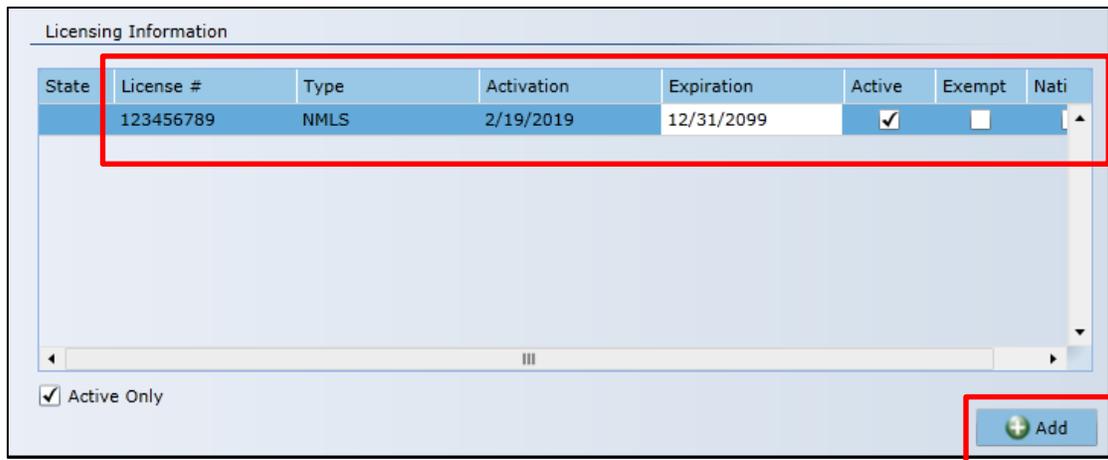
Multi-Factor Email: [Text]

Manager Selection

User's Manager: [Dropdown]

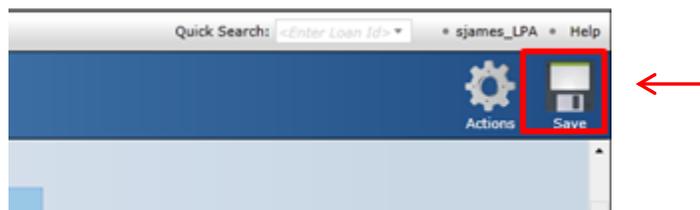
***Note:** SMS Provider, SMS Phone, Multi-Factor Email and User’s Manager are not required fields.

- 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:

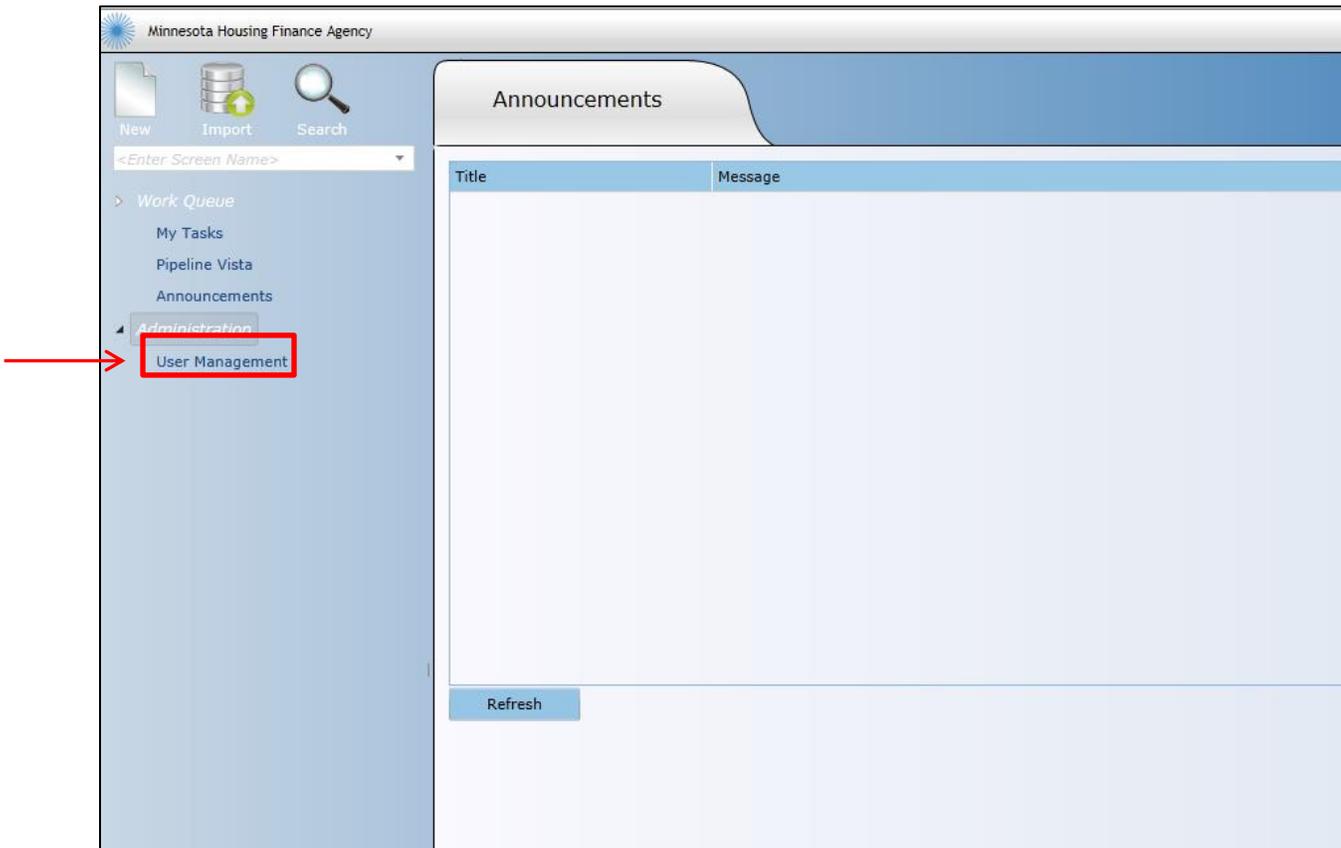


Managing a User

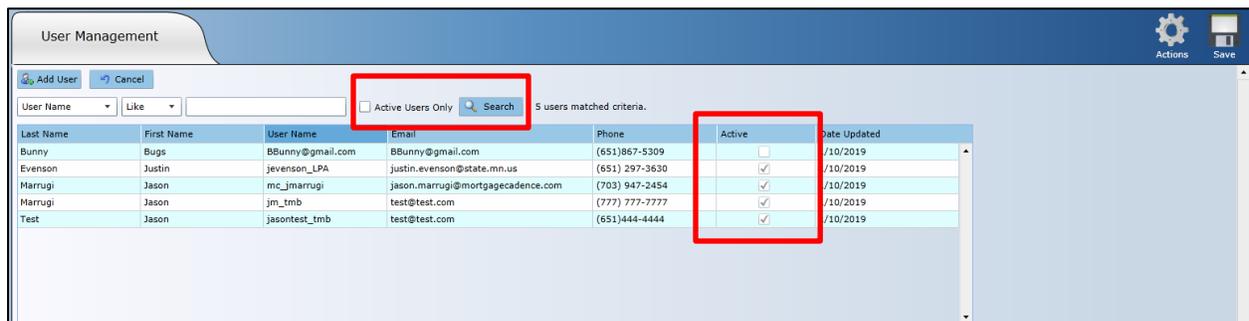
After logging into the Online Commitment System, the initial landing page will be the **Announcements** page.

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:

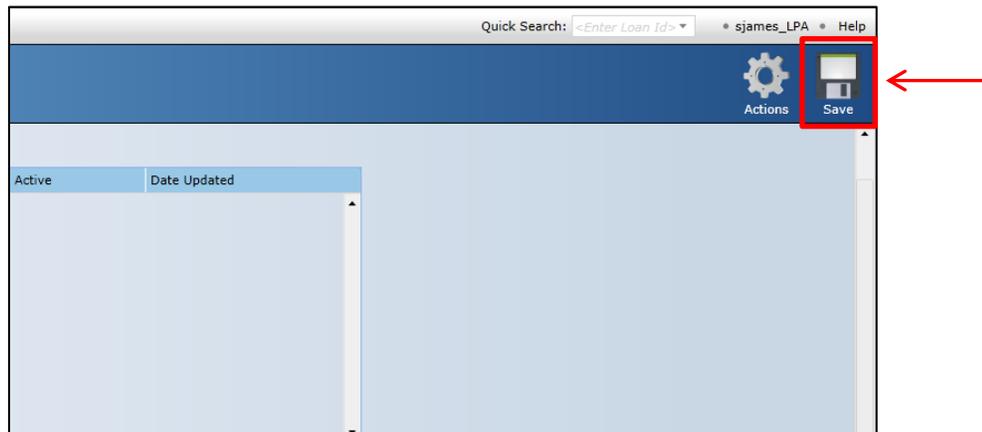
- Buttons: Add User, Cancel
- Search criteria: User Last Name (dropdown), Like (dropdown), smith (text input)
- Checkbox: Active Users Only
- Search button: Search (with magnifying glass icon)
- Feedback: 1 users matched criteria.
- Table with columns: Last Name, First Name, User Name, Email, Phone, Active, Date Updated
- Table data: 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:

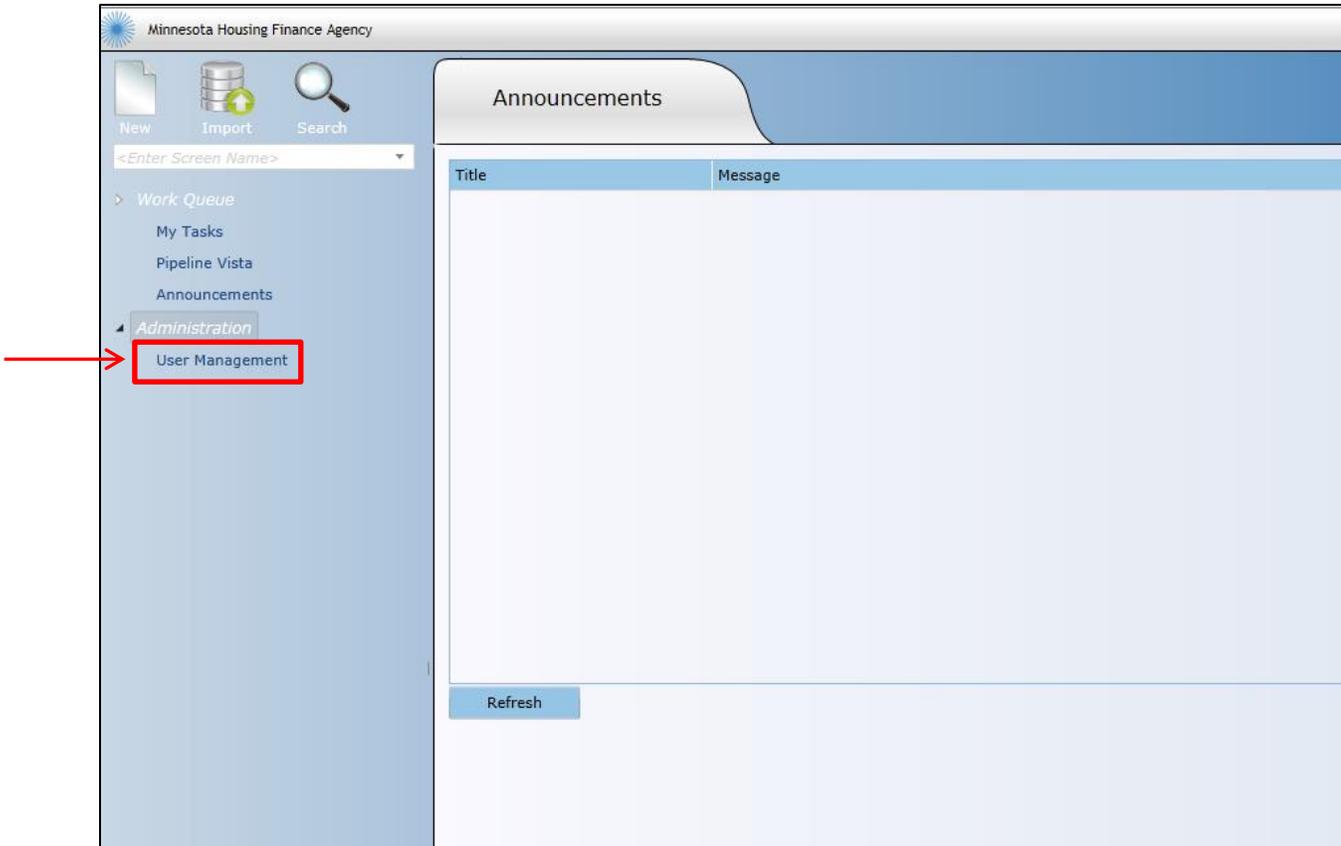
- Authentication Details** (Header, highlighted with a red box and arrow)
- User Name: johnasmith@testemail.com
- New Password: [Redacted with asterisks] (Arrow points to this field)
- Confirm Password: [Redacted with asterisks] (Arrow points to this field)
- Active User:
- Manager:
- Account Locked:
- Force Password Change** (Section Header, highlighted with a red box and arrow)
- Force Password Change:
- Default Department: Lending Partner (Dropdown menu)
- Account Expiration: 2/19/2021 (Date field)
- SMS Provider: [Redacted]
- SMS Phone: [Redacted]
- Multi-Factor Email: [Redacted]
- Manager Selection (Section Header)
- User's Manager: [Redacted]

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

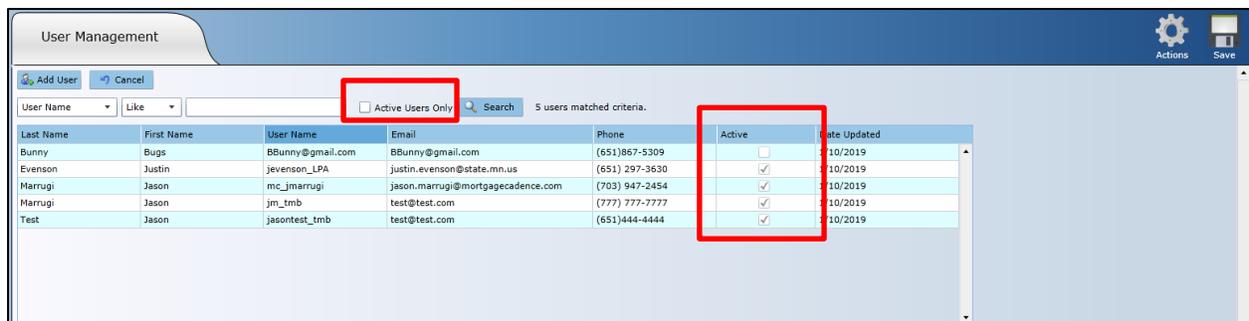


Adding a User to a New Group

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



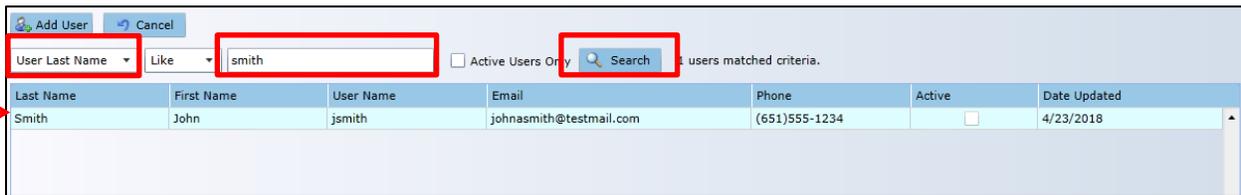
- Select the user from the list of active users:
 - Active users will be indicated by a checkmark in the active box.
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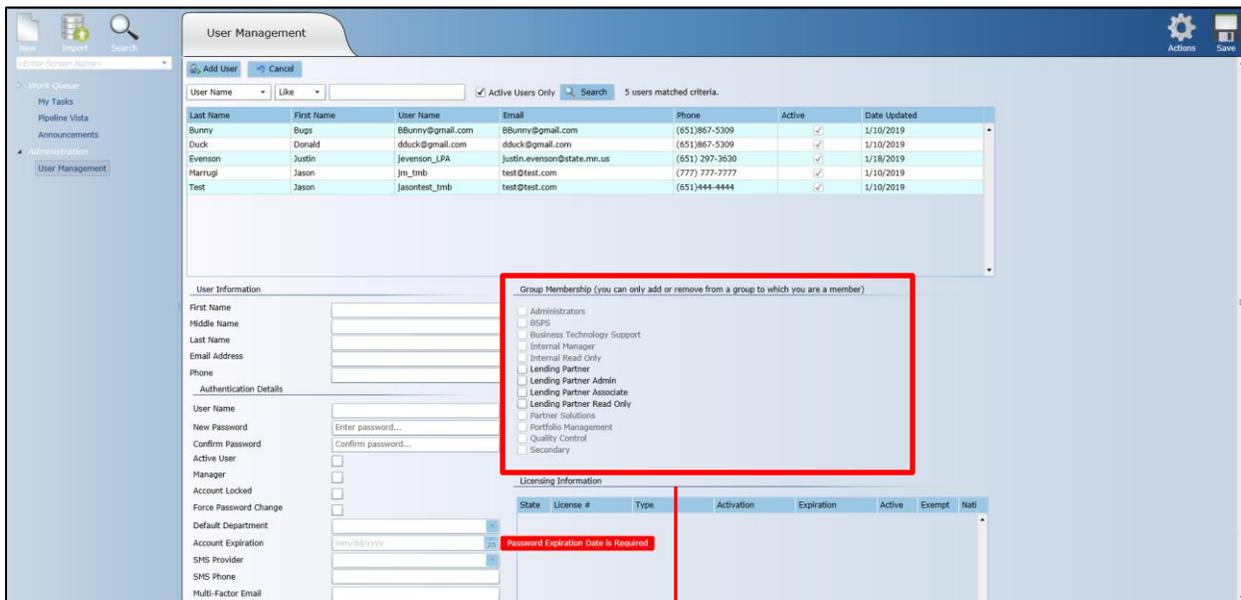
Note: You can search for users using the search box at the top of the screen.

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

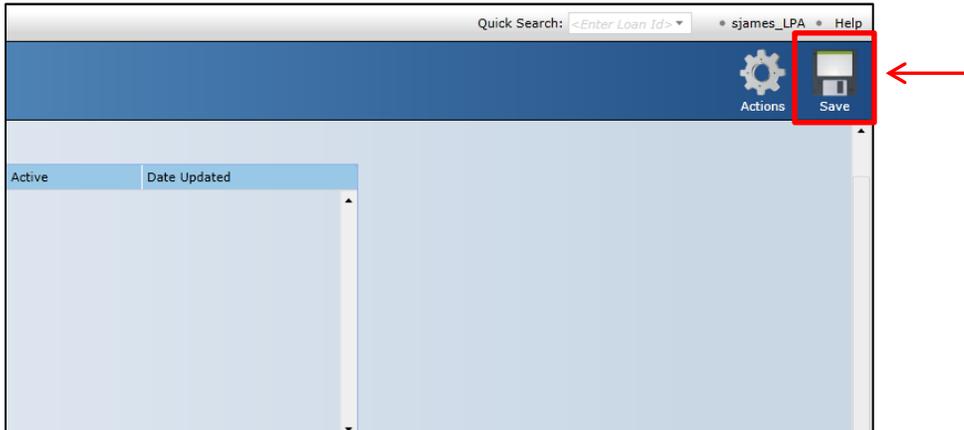
- Type in the name you are looking for and select the **Search** icon.



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

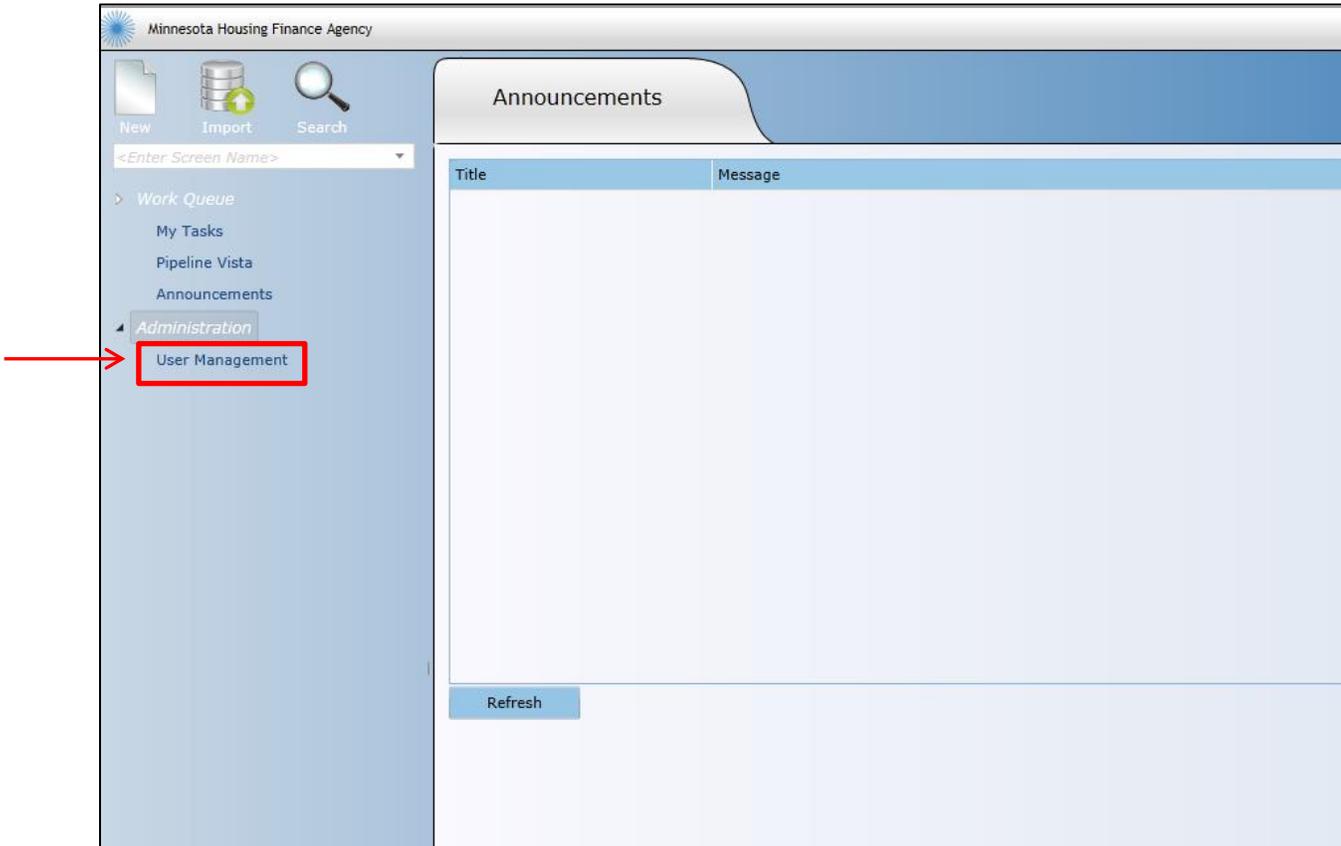


- Select the **Save** icon in the top Right corner of the screen.

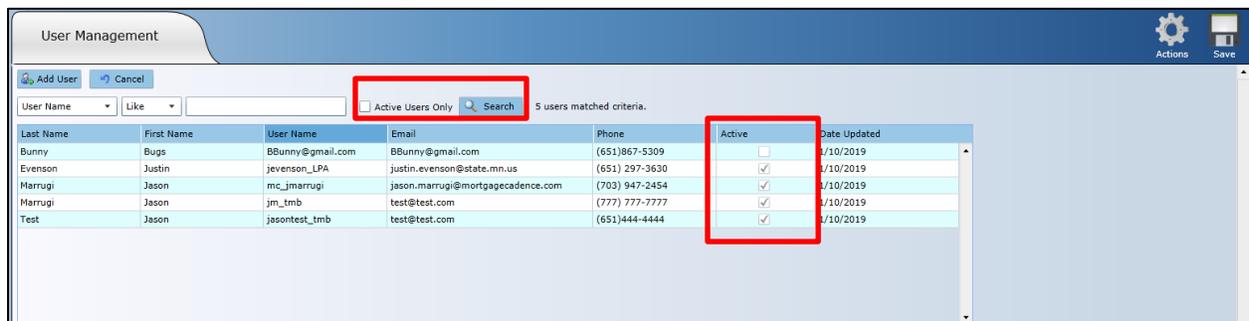


Adding or Updating Licensing Information for a User

- Select **User Management**.



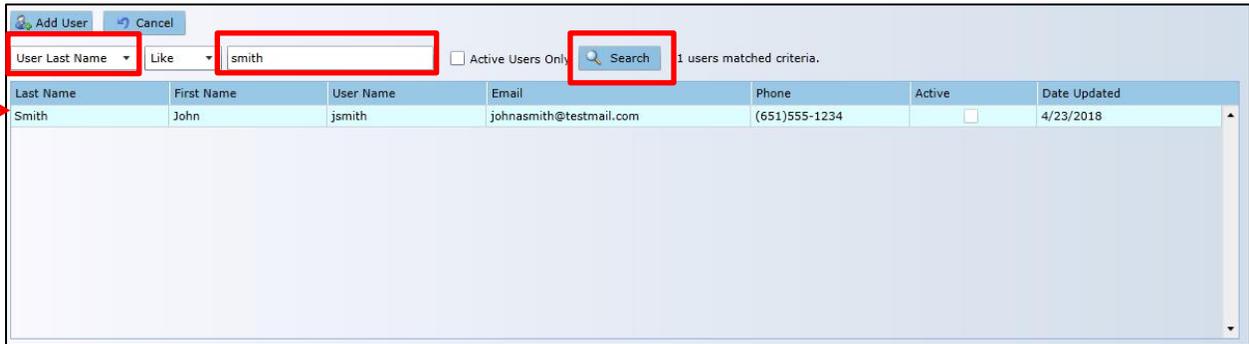
- Select the user from the list of active users:
 - Active users will be indicated by a checkmark in the active box.
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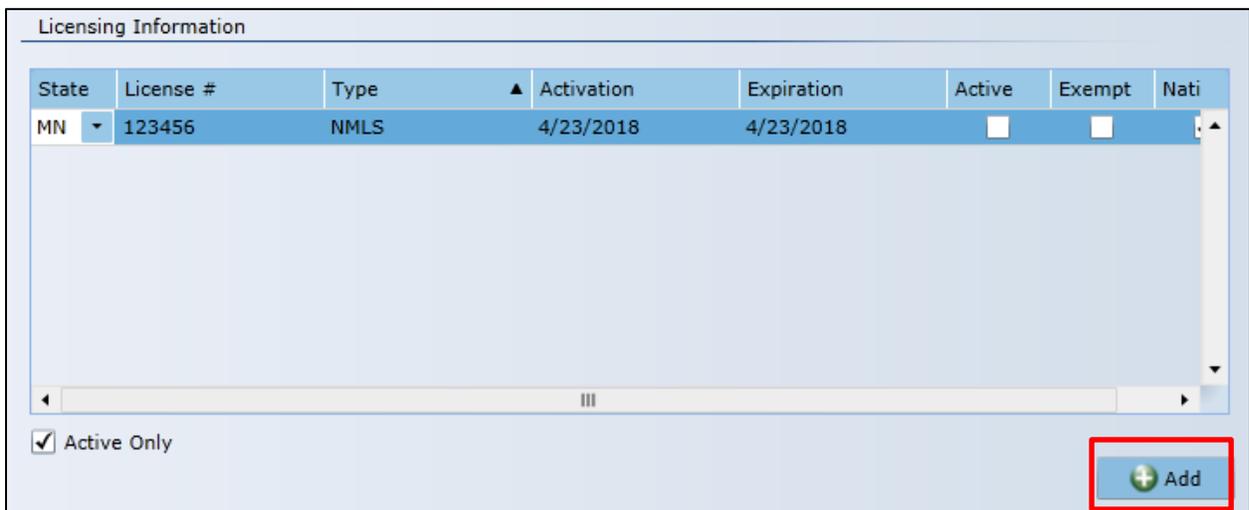
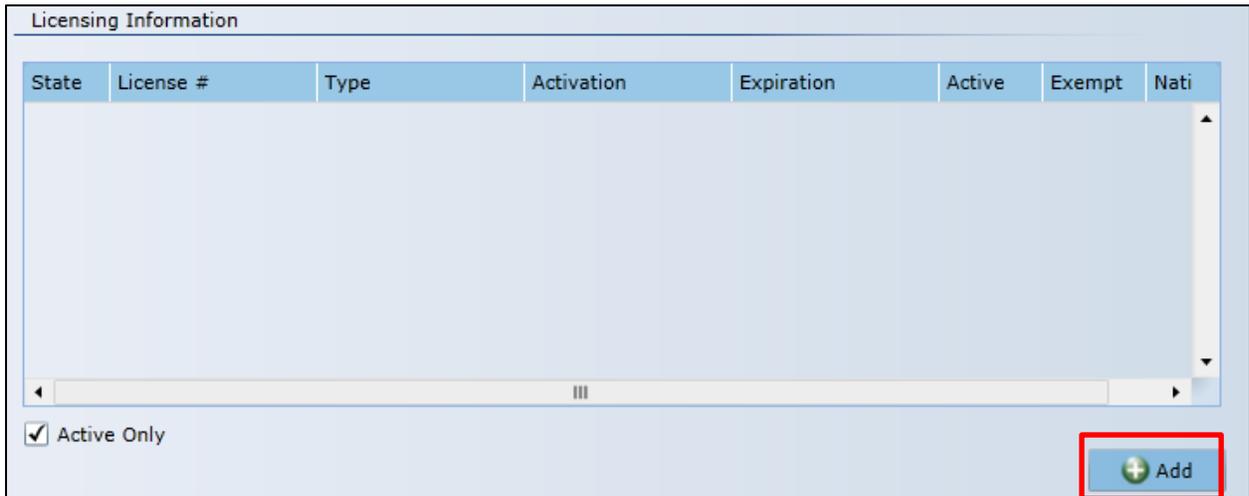
Note: You can search for users using the search box at the top of the screen.

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

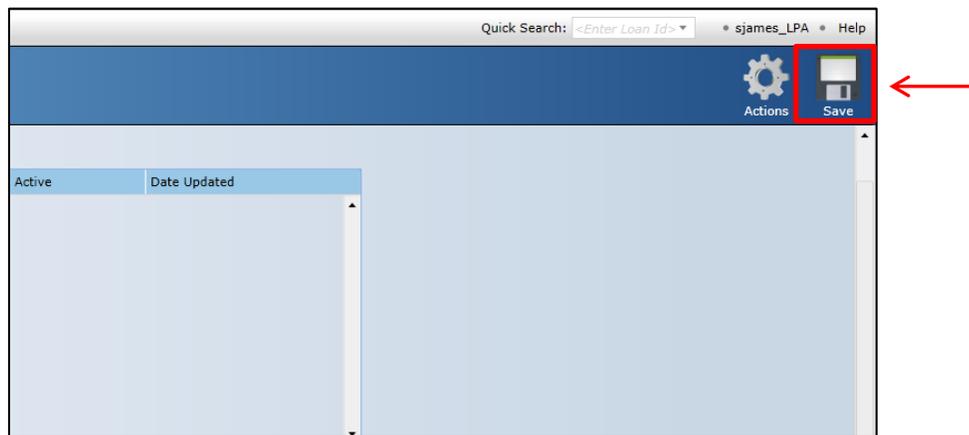
- Type in the name you are looking for and select the **Search** icon.



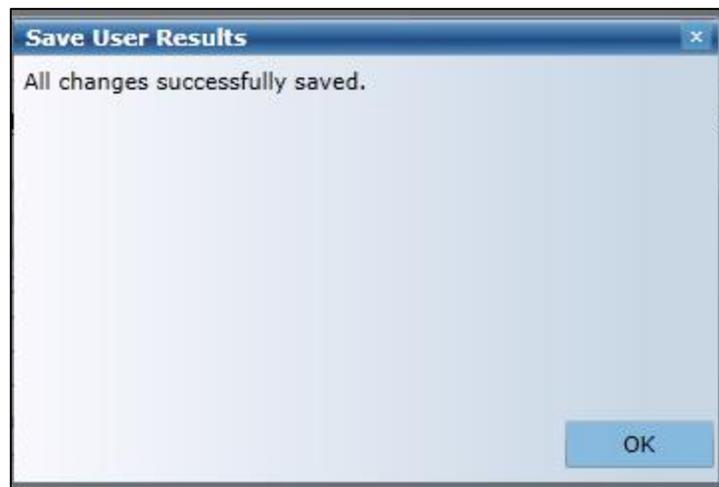
- Double-click on the User that you would like to manage
- Select the **Add** icon in the bottom right corner of the **User Management** screen.



- 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.