Web Administrator System Guide

May 11, 2022

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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.*

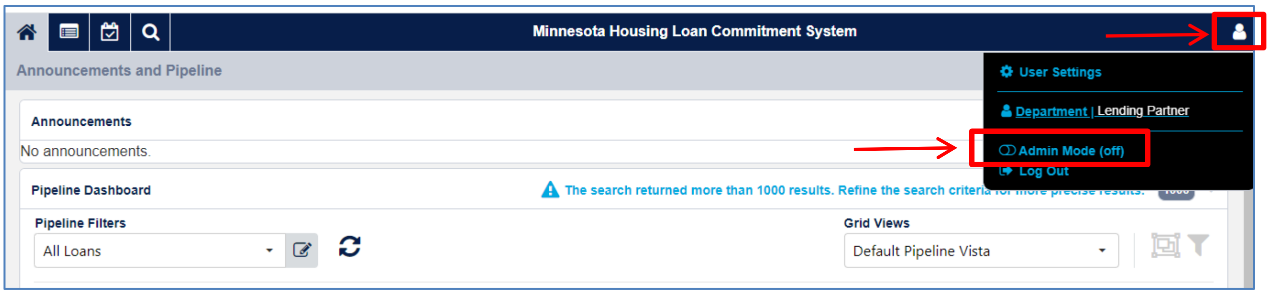
Setting up a New User

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

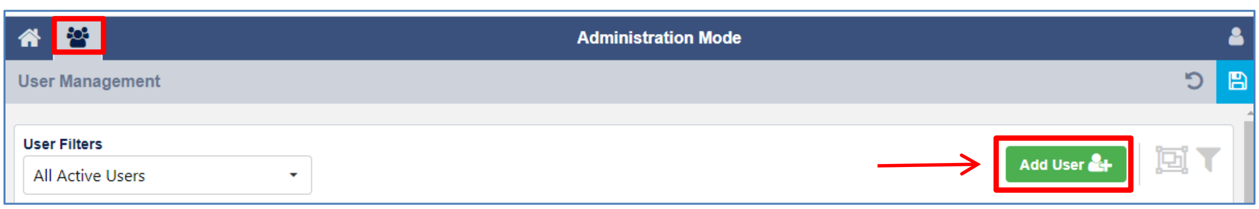
After login into the Online Commitment System, the initial landing page will be the **Announcements and Pipeline** screen.

To create a New User

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

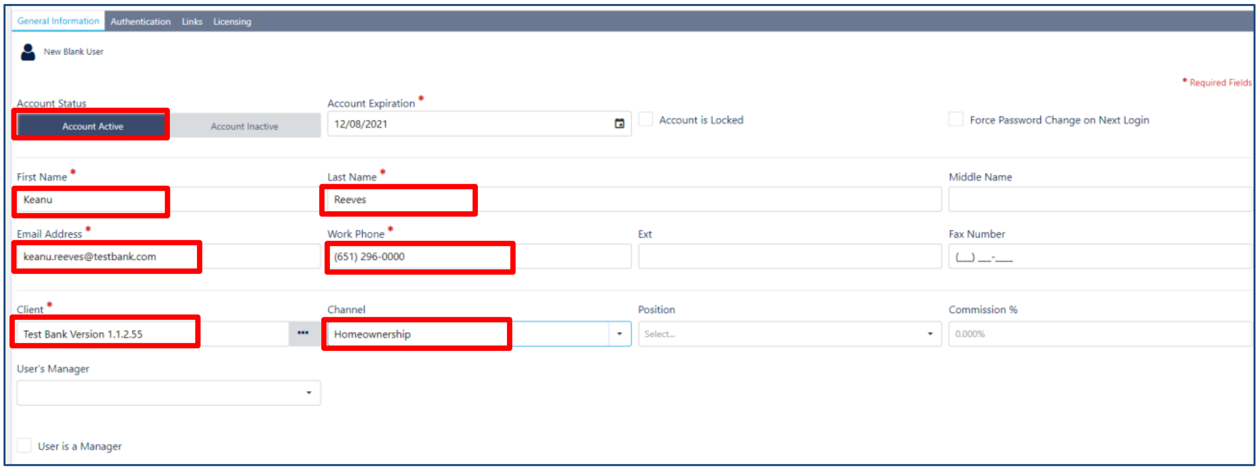


- Select the User Management icon and click **Add User** icon in the top Right corner of the page.



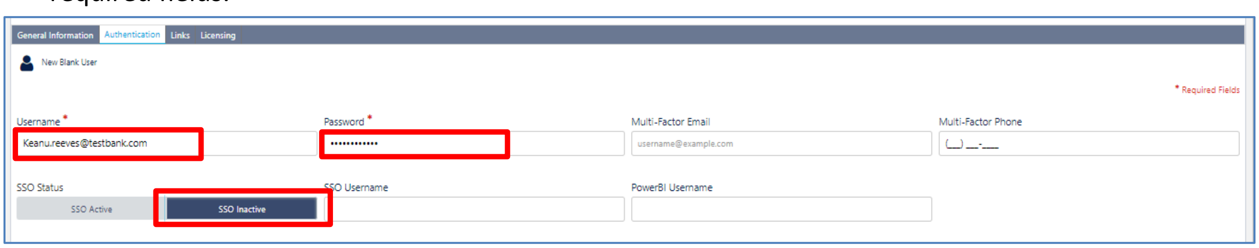
- Complete the following fields under **General Information** tab
  - Account Expiration
    - ➢ The account expiration date is automatically set by the system a year from current date.
  - First Name
  - Last Name
  - Email Address
  - Work Phone

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

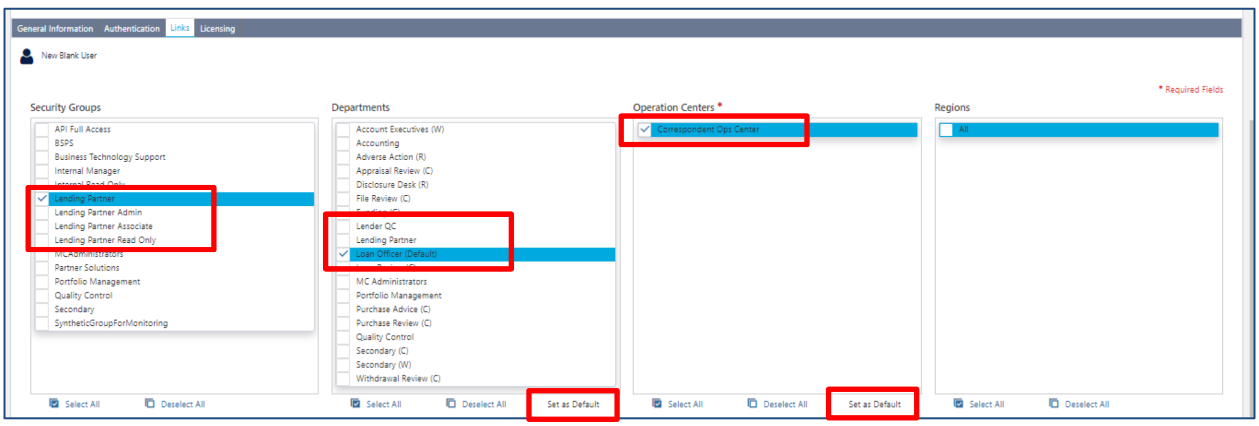


- Complete the following fields under **Authentication** tab
  - Username should be set as the **person's email address**
  - Password Requirements:
    - Must contain at least 12 characters
    - Must contain at least one uppercase letter
    - Must contain at least one lowercase letter
    - Must contain at least one number
    - Must contain at least one special character (!"#$%&'()*+,-./:;<=>?@[\]^_`{)
    - Password must be changed every 6 months
    - Passwords cannot be reused

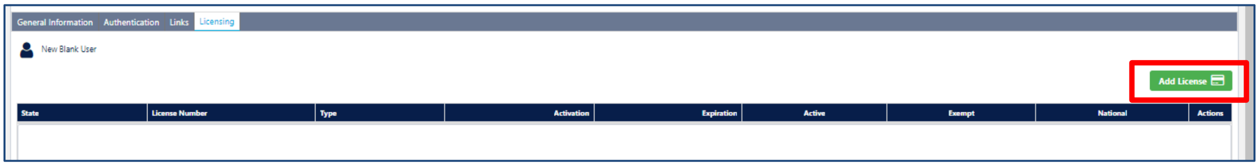
***Note:** Multi-Factor Email, Multi-Factor Phone, SSO Username, and PowerBI Username are not required fields.



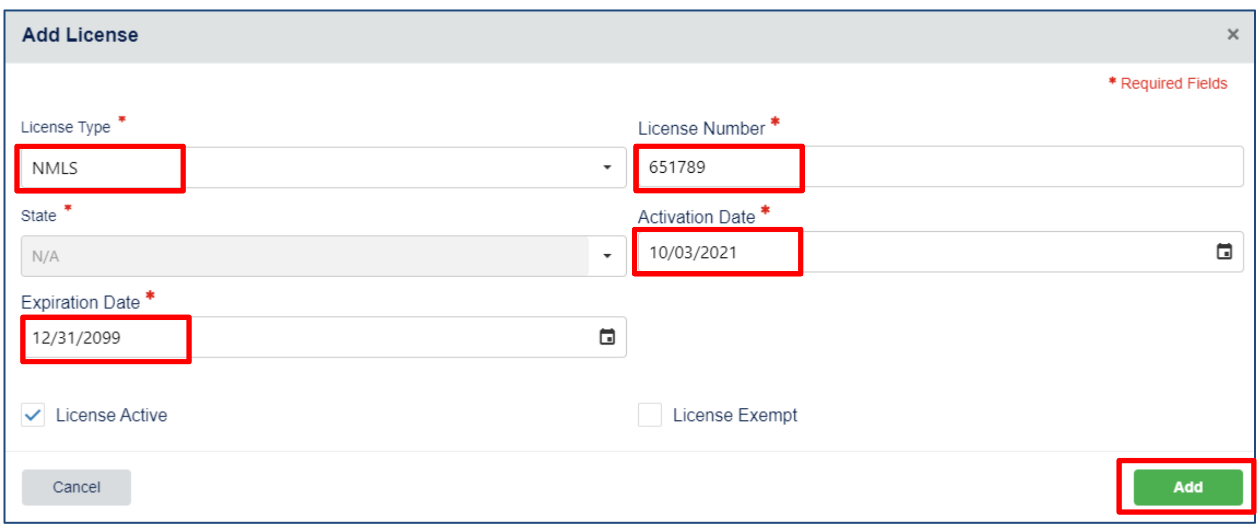
- Complete the following fields under **Links** tab
- Select appropriate boxes to assign to the new user under **Security Groups:**
  - **Lending Partner** – Can enter a loan from lock to true and certify.
  - **Lending Partner Admin** – This is the Web Administrator; this membership should not be selected 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

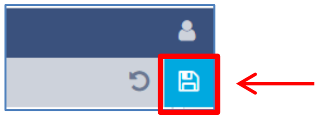


- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
    - License Type
        - ➢ Type NMLS will display Loan Officer's NMLS# on the documents
    - License Number
    - State auto fills N/A when NMLS is selected
    - Activation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

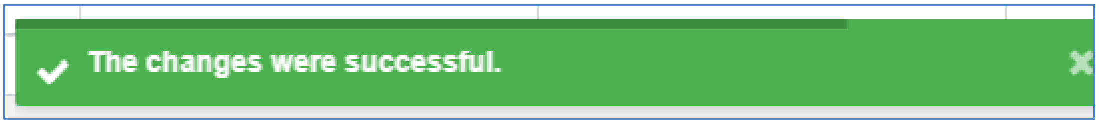


- Select the **Add License** icon again to add multiple License numbers.

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



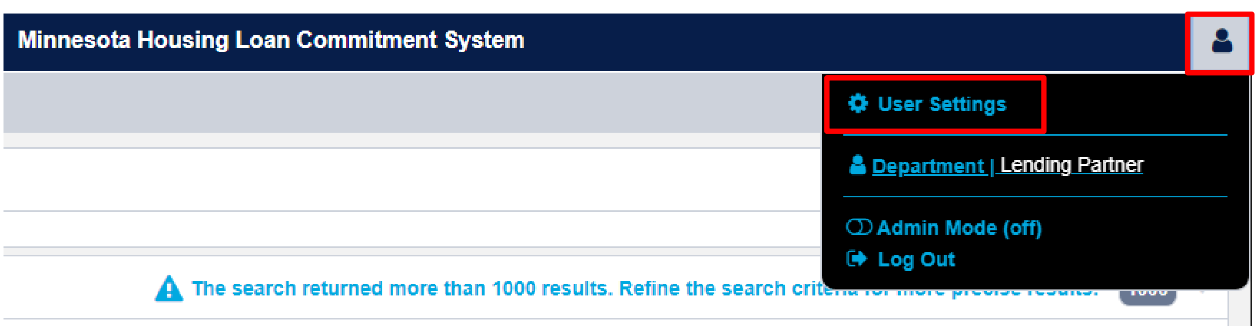
- If done correctly, the following notification will display:



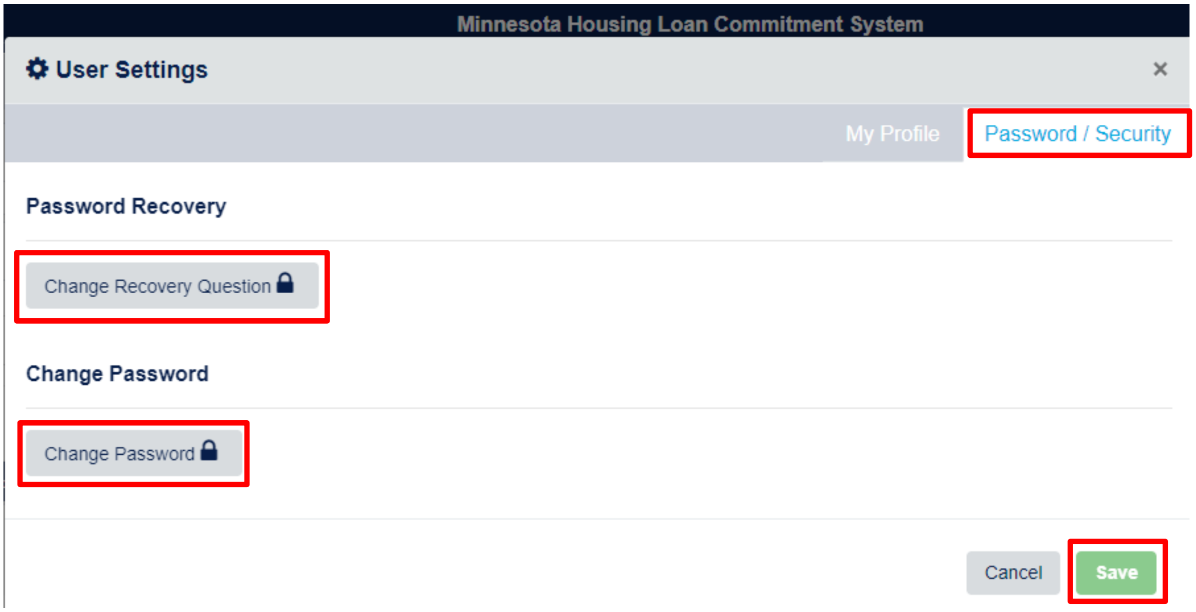
- If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.

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.



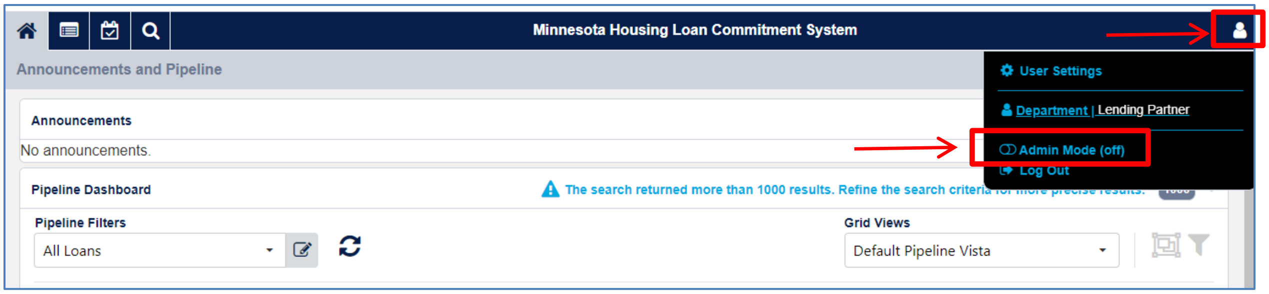
- Select “Password/Security” tab.
- Set up a new password and username/password recovery question.



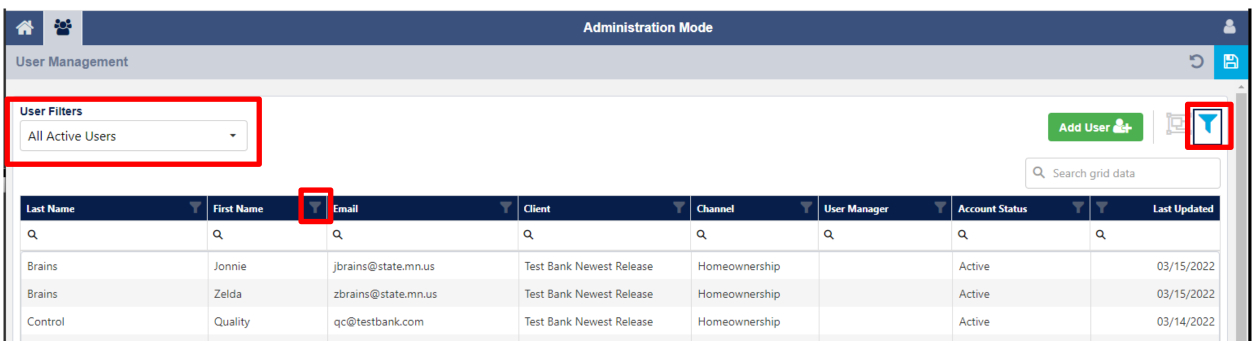
Managing a User

To manage a current user

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



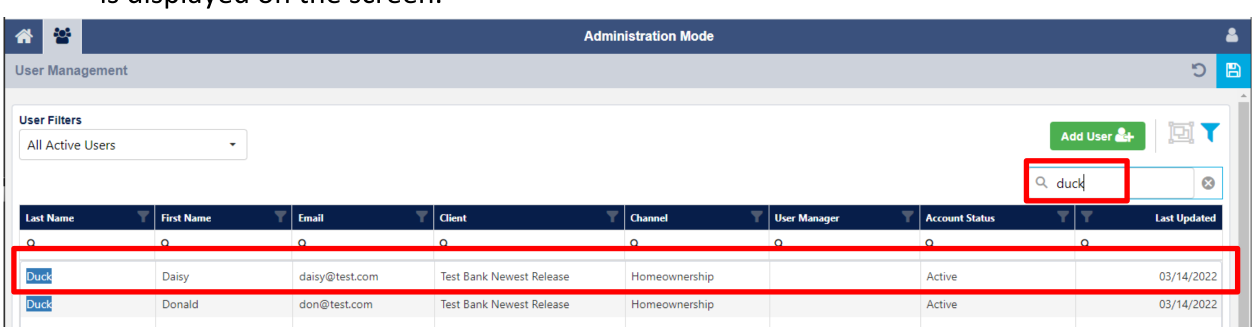
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

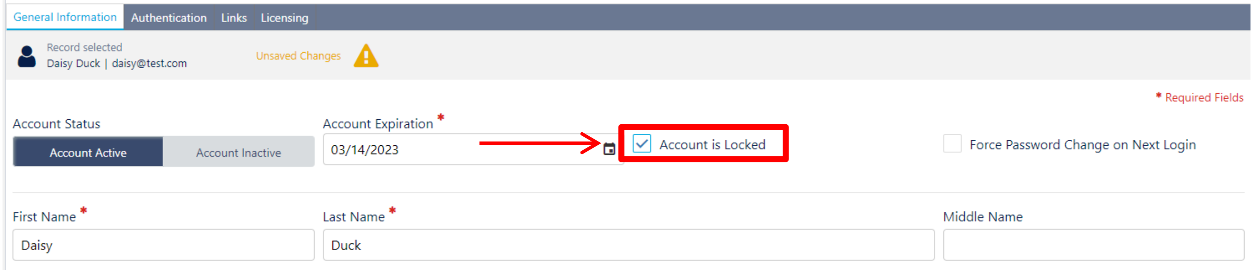
Or

- 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.

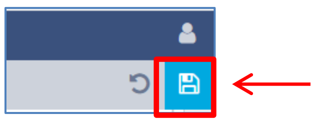


- Double-click on the User that you would like to manage.

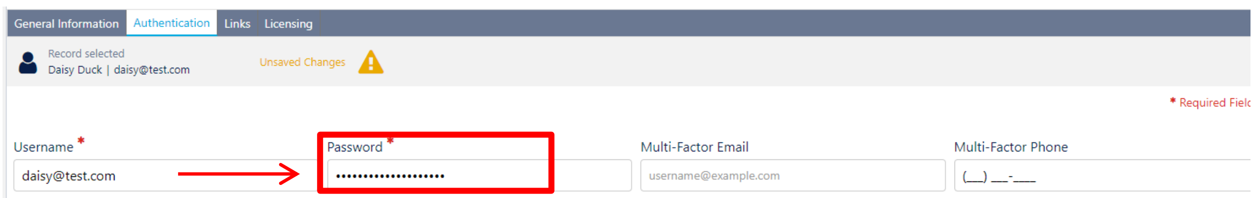
- **Locked Account**
  - If account is locked, Account is Locked is checked on General Information tab. Uncheck to unlock account.



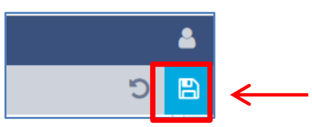
  - Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.



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

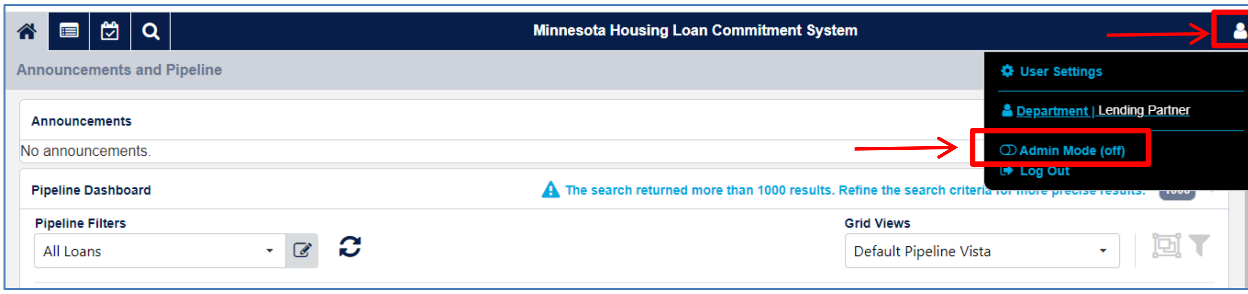


  - Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

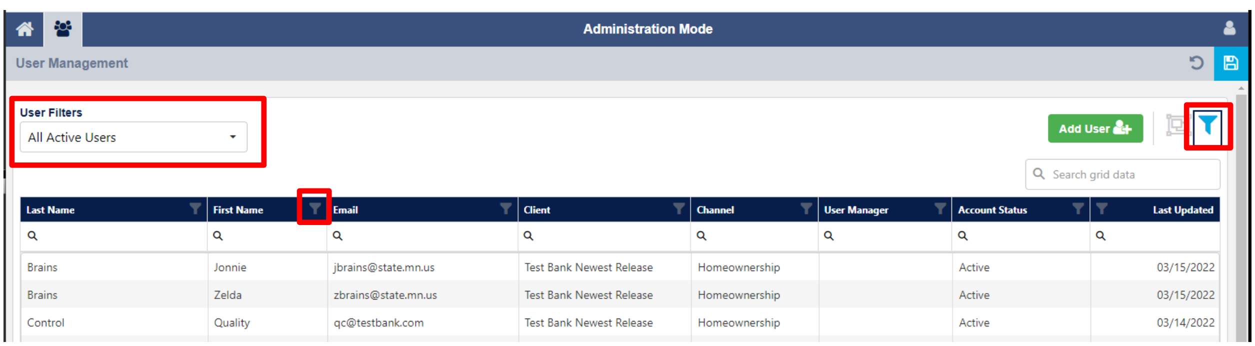


Adding a User to a New Group or Department

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



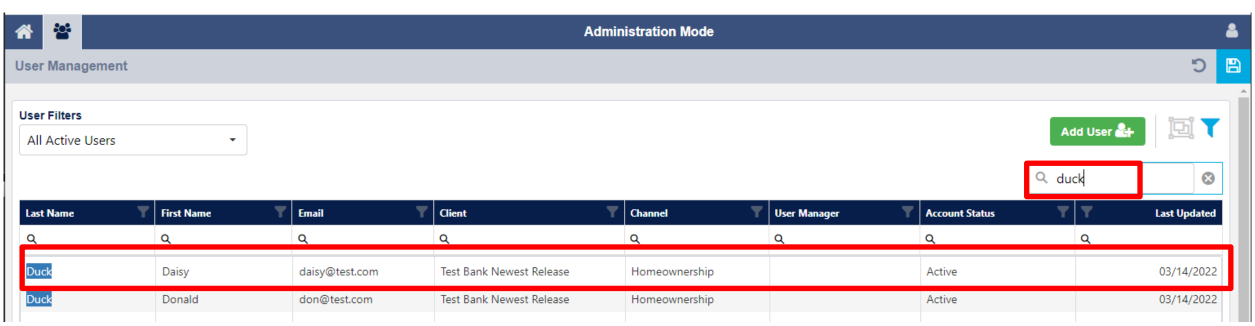
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

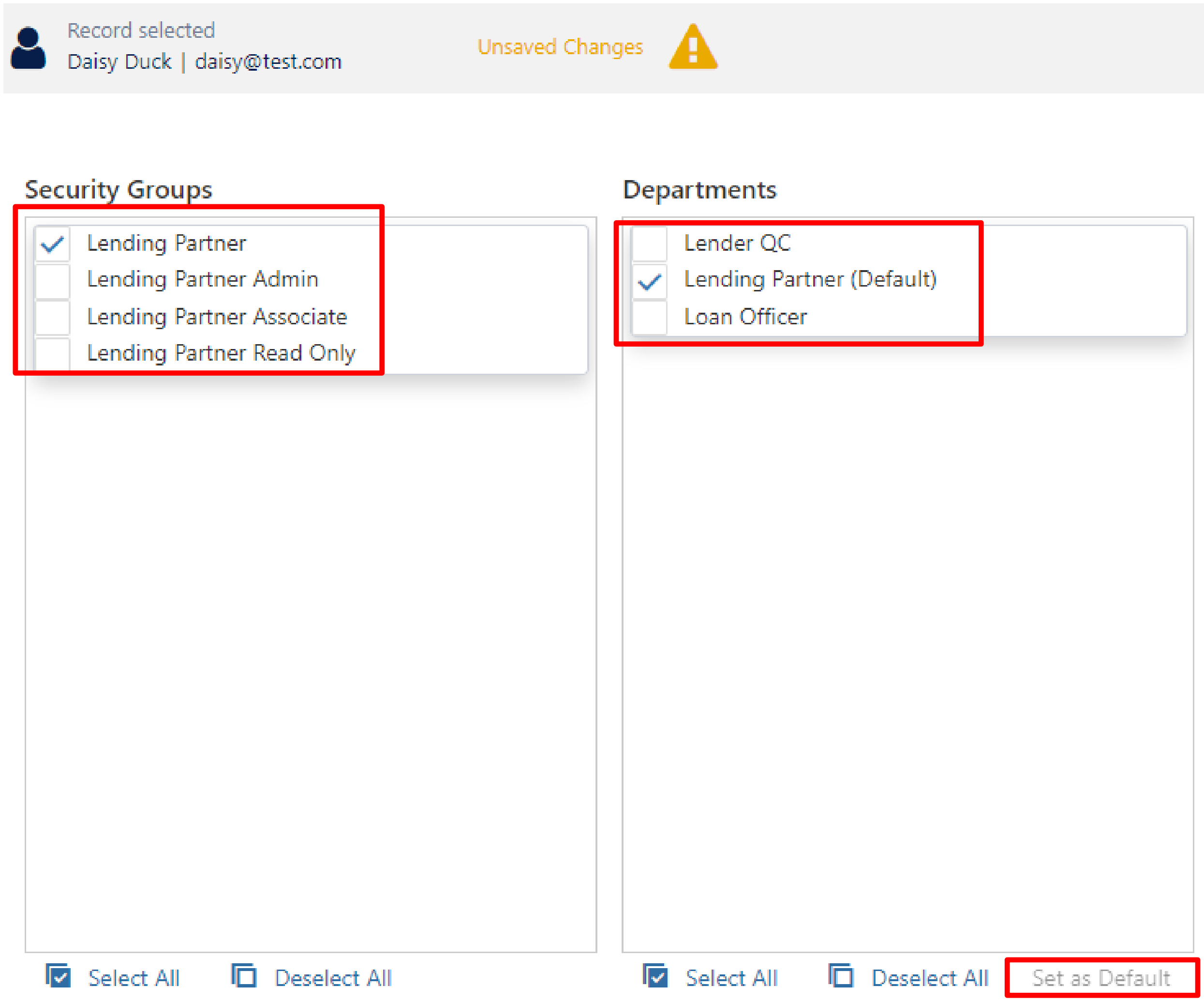
Or

- 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.

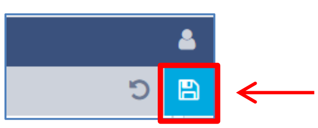


- Double-click on the User that you would like to manage.

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

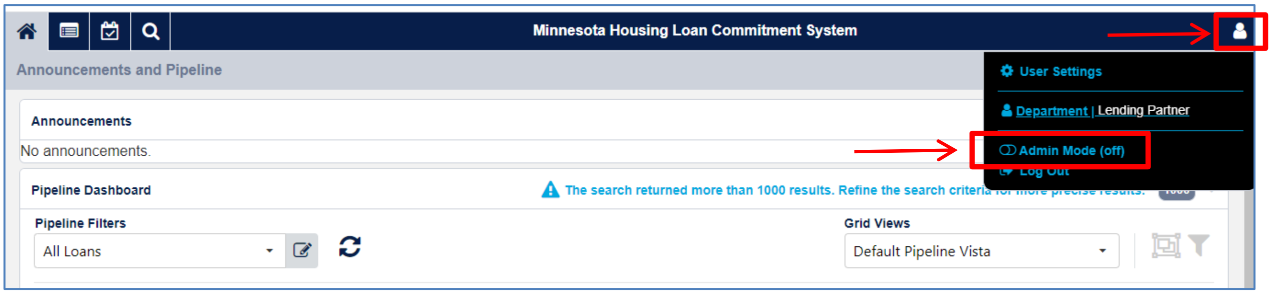


- Select the **Save** icon in the top Right corner of the screen.

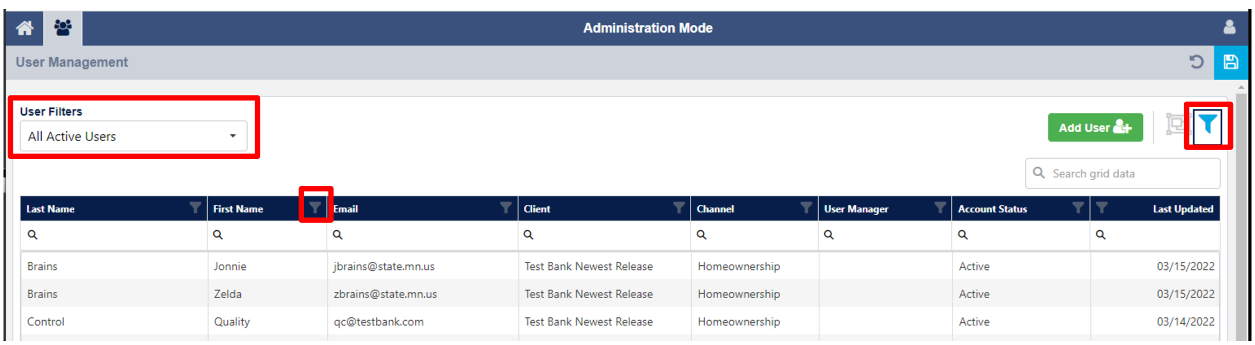


Adding or Updating Licensing Information for a User

- 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.



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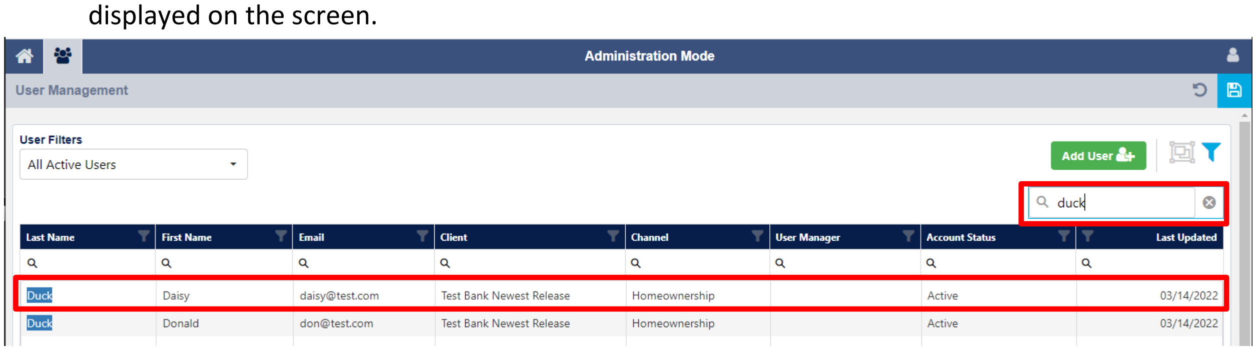
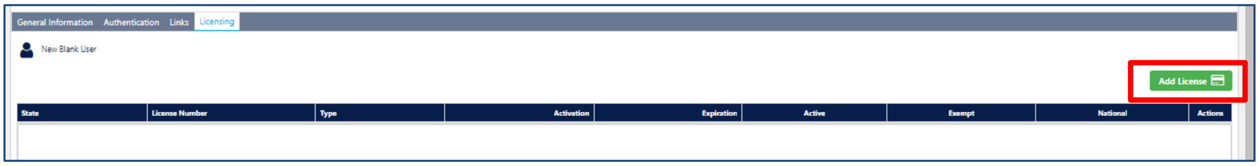
Or

- 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.

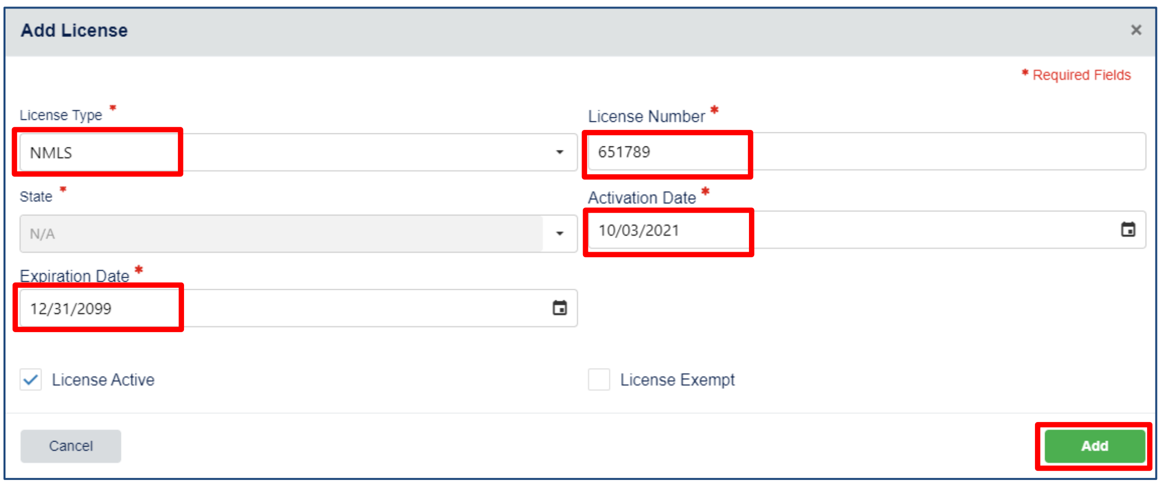


- Double-click on the User that you would like to manage.

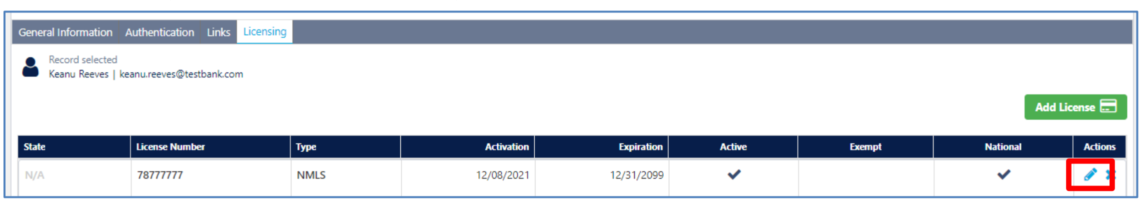
- Select the **Add License** icon in the bottom right corner of the User Management screen



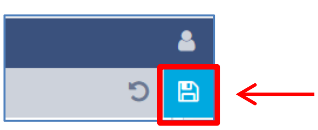
- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
    - License Type
        - Type NMLS will display Loan Officer's NMLS# on the documents
    - License Number
    - State auto fills N/A when NMLS is selected
    - Activation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



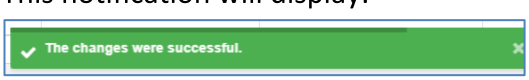
- To modify License, click on the pencil in the Action column.



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

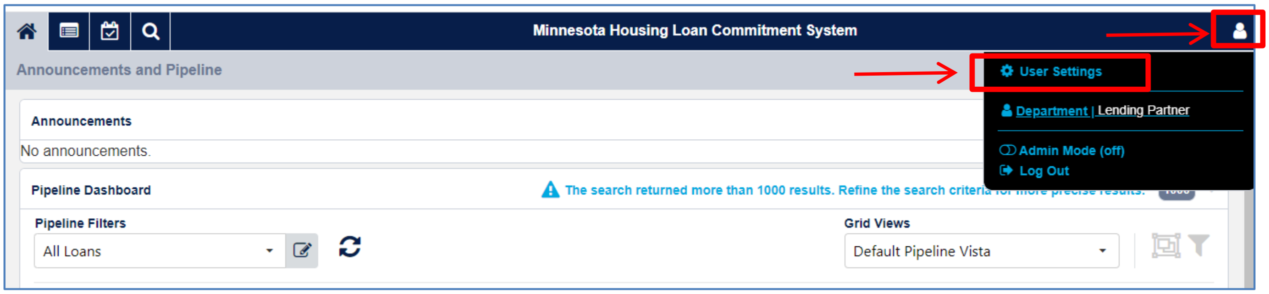


- This notification will display:

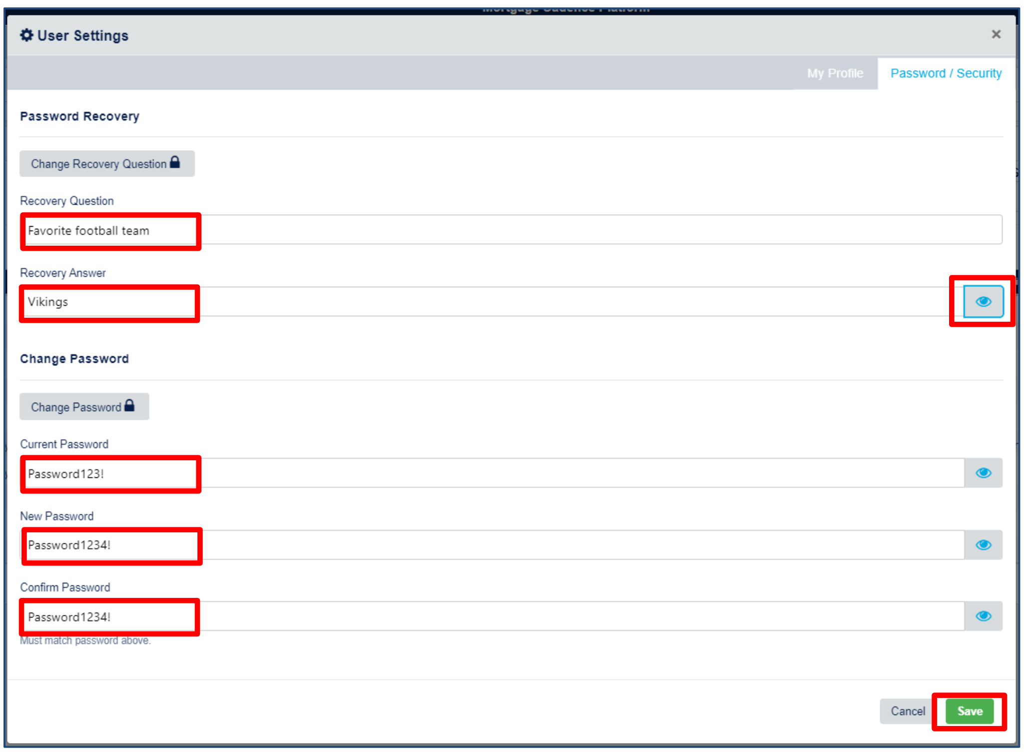


Username/Password Help

- 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: