Web Administrator System Guide

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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.

<table>
<thead>
<tr>
<th>Security Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign users a Security Groups, which determines the access they will have in the online commitment system:</td>
</tr>
<tr>
<td>• <strong>Lending Partner Admin</strong> – Allows user to set-up user accounts “Web Admin”.</td>
</tr>
<tr>
<td>o More than one web admin is permitted.</td>
</tr>
<tr>
<td>o If you select this option, you must also select “Lending Partner,” “Lending Partner Associate,” and “Lending Partner Read Only.”</td>
</tr>
<tr>
<td>• <strong>Lending Partner</strong> – Allows users to lock and “True and Certify” a loan, as well as make changes to a loan once it is locked.</td>
</tr>
<tr>
<td>• <strong>Lending Partner Associate</strong> – Allows users to lock the loan.</td>
</tr>
<tr>
<td>• <strong>Lending Partner Read Only</strong> – Allows user to view pipeline and upload closed loan files.</td>
</tr>
<tr>
<td>All Security Groups have access to order documents.</td>
</tr>
<tr>
<td><em>The web administrator should have all four Security Groups.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign users a Departments based on their role in the loan process (select only one):</td>
</tr>
<tr>
<td>• <strong>Loan Officer</strong> - Select this option for any originator. This will ensure loans are assigned correctly to individuals that originate loans.</td>
</tr>
<tr>
<td>o You must include the loan officer’s NMLS license number.</td>
</tr>
<tr>
<td>• <strong>Lending Partner</strong> - 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.).</td>
</tr>
<tr>
<td>• <strong>Lender QC</strong> - Select this option for anyone who should be notified by the Minnesota Housing Quality Control team when a loan is selected for audit.</td>
</tr>
<tr>
<td>o This user will be responsible for working with and resolving Quality Control audits.</td>
</tr>
<tr>
<td><em>The web administrator should have all three Departments.</em></td>
</tr>
</tbody>
</table>
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
  o Username should be set as the person’s email address
  o 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**:
  o **Lending Partner** – Can enter a loan from lock to true and certify.
  o **Lending Partner Admin** – This is the Web Administrator; this membership should not be selected for any other user.
  o **Lending Partner Associate** – Can enter a loan through lock.
  o **Lending Partner Read Only** – Can view loan data only.
• Select appropriate **Department** (must set as Default for one of these):
  o **Lending Partner** (underwriter, processor, closer, lock desk, etc.)
  o **Loan Officer** (allows the Loan Officer name to be selected)
  o **Lender QC** (closer, post closer, etc.)
• Multiple Departments are needed:
  o 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:
  o **Correspondent Ops Center**
    ➢ Set as Default
• Complete the following fields under Licensing tab if Loan Officer user has an NMLS number.
  o 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:
  o License Type
    ➢ Type NMLS will display Loan Officer’s NMLS# on the documents
  o License Number
  o State auto fills N/A when NMLS is selected
  o Activation Date (date user is added)
  o Expiration Date (Enter 12/31/2099)
  o License Active is pre checked
  o 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:

  ![The changes were successful.](image)

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

  ![Please correct the errors below in the following tab(s): Links](image)

*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 then what is displayed on the screen.

- Double-click on the User that you would like to manage.
• **Locked Account**
  
  o If account is locked, Account is Locked is checked on General Information tab. Uncheck to unlock account.
  
  ![Locked Account Image]

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

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

  ![Password Reset Image]

  o 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.

*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 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
  o 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: