



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.*

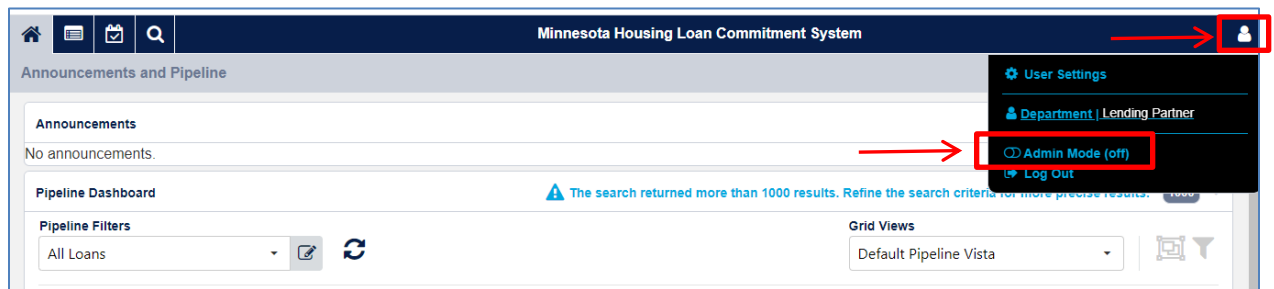
Setting up a New User

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

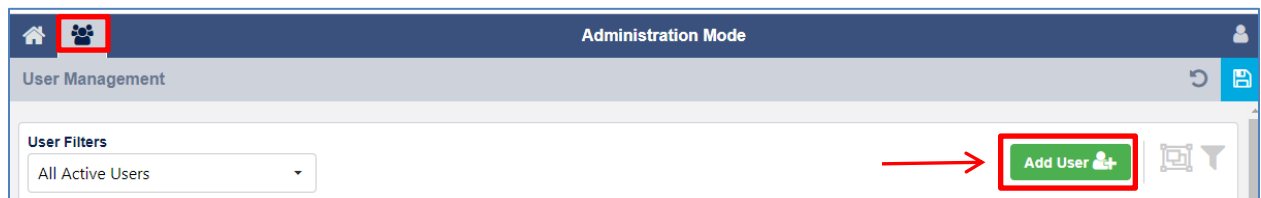
After login into the Online Commitment System, the initial landing page will be the **Announcements and Pipeline** screen.

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.

General Information | Authentication | Links | Licensing

New Blank User

Account Status: **Account Active** | Account Inactive | Account Expiration: 12/08/2021 | Account is Locked | Force Password Change on Next Login

First Name: **Keanu** | Last Name: **Reeves** | Middle Name:

Email Address: **keanu.reeves@testbank.com** | Work Phone: **(651) 296-0000** | Ext: | Fax Number: () - -

Client: **Test Bank Version 1.1.2.55** | Channel: **Homeownership** | Position: Select... | Commission %: 0.000%

User's Manager:

User is a Manager

- 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.

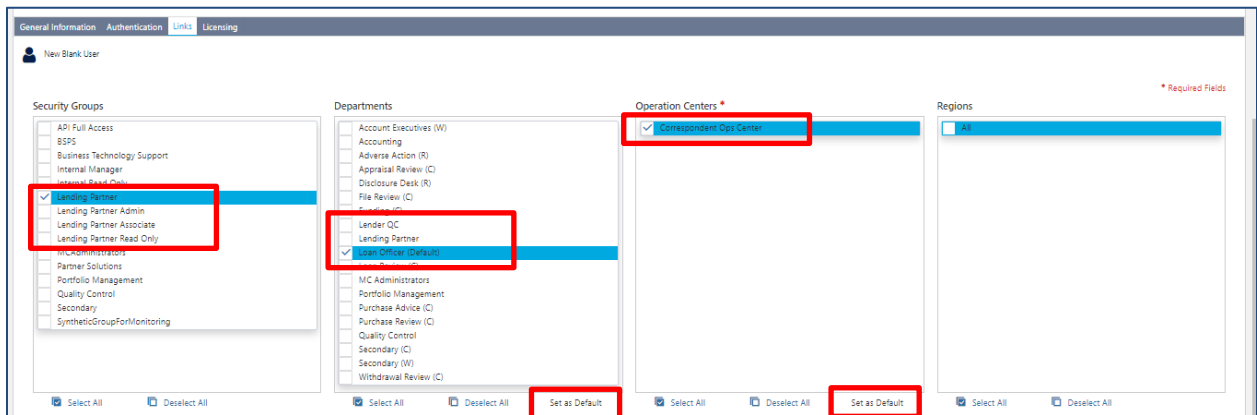
General Information | **Authentication** | Links | Licensing

New Blank User

Username: **keanu.reeves@testbank.com** | Password: | Multi-Factor Email: username@example.com | Multi-Factor Phone: () - -

SSO Status: SSO Active | **SSO inactive** | SSO Username: | PowerBI Username:

- 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

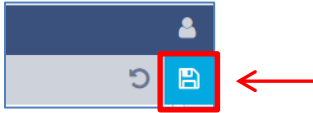
The 'Add License' form is displayed in a modal window. It contains the following fields and options:

- License Type ***: A dropdown menu with 'NMLS' selected. This field is highlighted with a red box.
- License Number ***: A text input field containing '651789'. This field is highlighted with a red box.
- State ***: A dropdown menu with 'N/A' selected.
- Activation Date ***: A date picker field showing '10/03/2021'. This field is highlighted with a red box.
- Expiration Date ***: A date picker field showing '12/31/2099'. This field is highlighted with a red box.
- License Active**: A checked checkbox.
- License Exempt**: An unchecked checkbox.
- Buttons**: 'Cancel' and 'Add' buttons. The 'Add' button is highlighted with a red box.

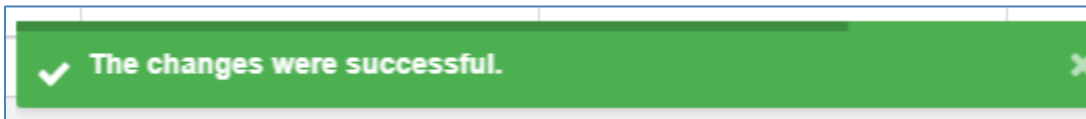
A red asterisk icon and the text '* Required Fields' are located in the top right corner of the form area.

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

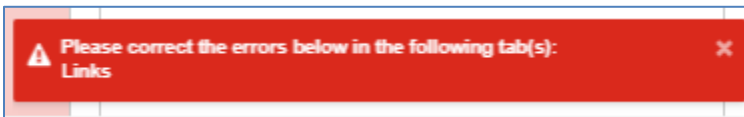
- Once all fields have been completed, select the **Save** icon in the top Right corner of the screen to complete the New User account.



- If done correctly, the following notification will display:

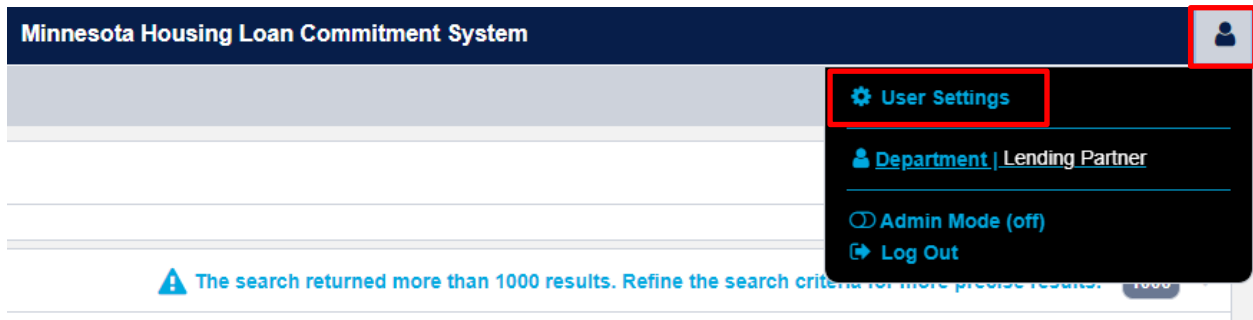


- If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.



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.



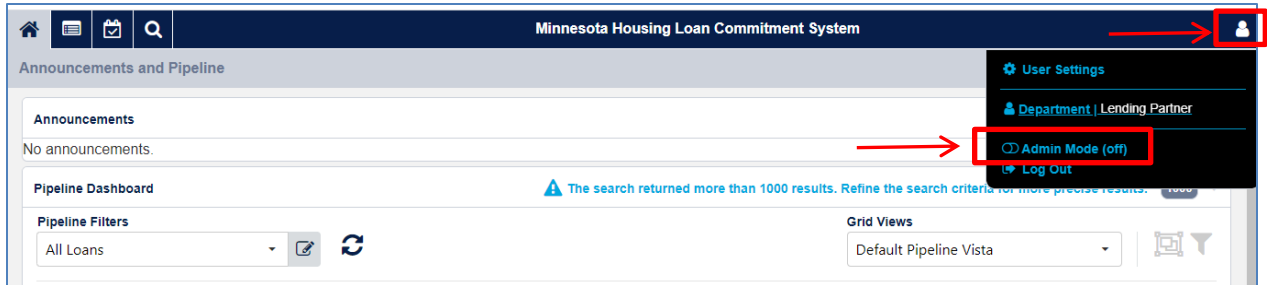
- Select “Password/Security” tab.
- Set up a new password and username/password recovery question.

The screenshot displays the 'User Settings' interface for the Minnesota Housing Loan Commitment System. The 'Password / Security' tab is selected and highlighted with a red box. Below the tab, there are two main sections: 'Password Recovery' and 'Change Password'. In the 'Password Recovery' section, the 'Change Recovery Question' button is highlighted with a red box. In the 'Change Password' section, the 'Change Password' button is highlighted with a red box. At the bottom right of the interface, there are two buttons: 'Cancel' and 'Save', with the 'Save' button highlighted with a red box.

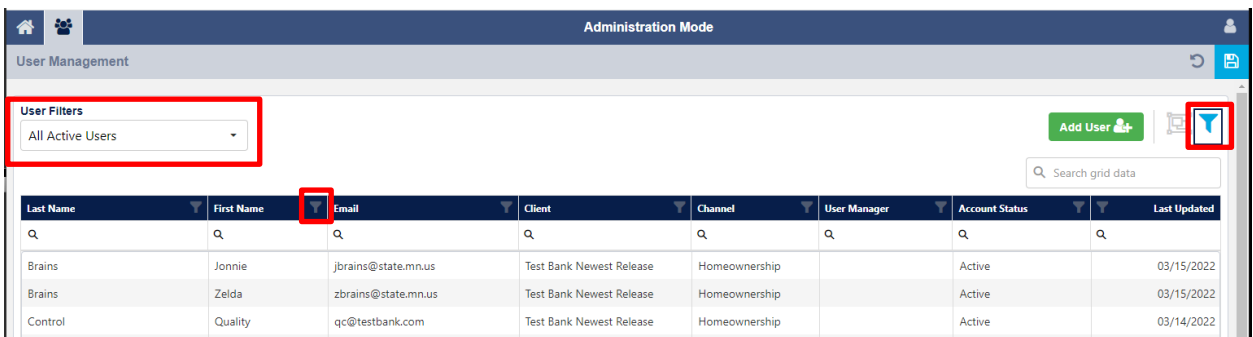
Managing a User

To manage a current user

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



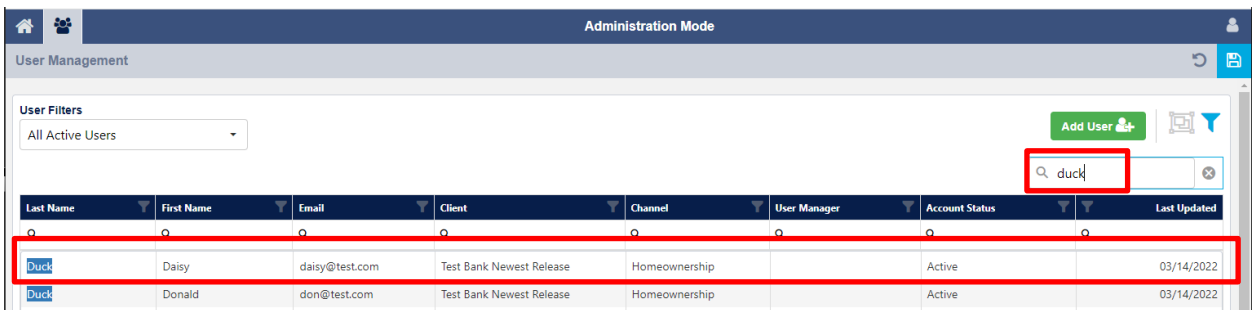
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



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

Or

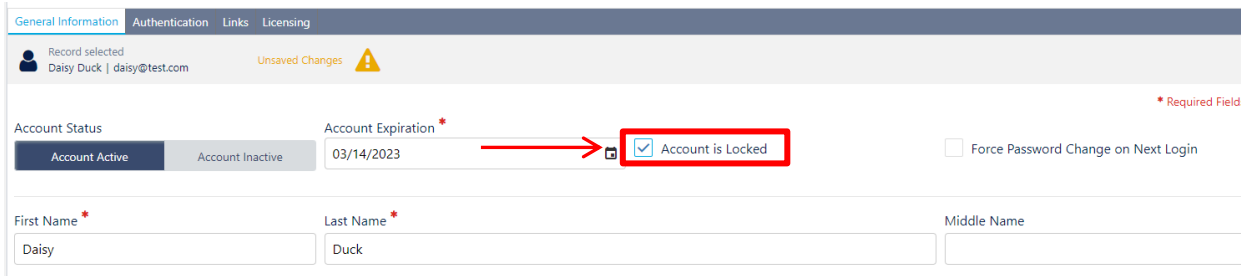
- Type in the name you are looking for in the **Search grid data** text box.
 - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



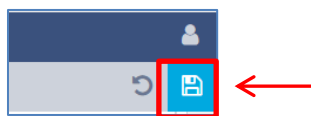
- Double-click on the User that you would like to manage.

• **Locked Account**

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

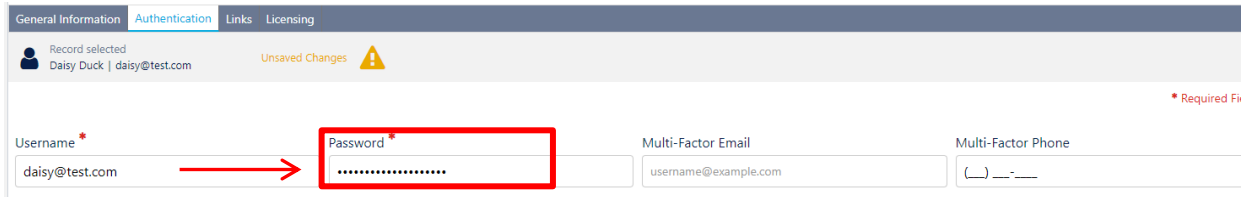


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

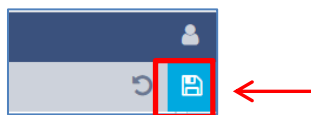


• **Password Reset**

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

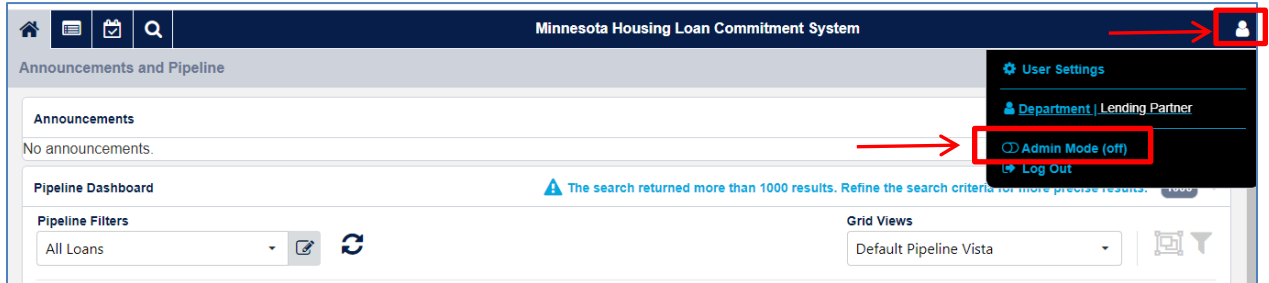


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

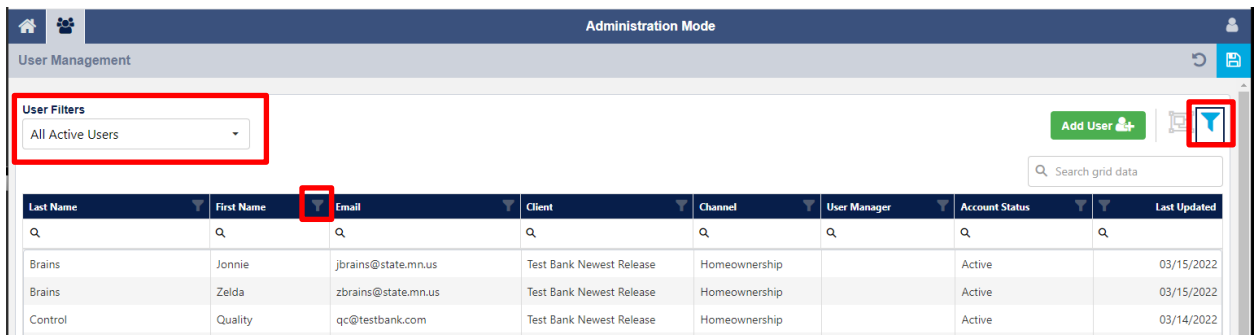


Adding a User to a New Group or Department

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



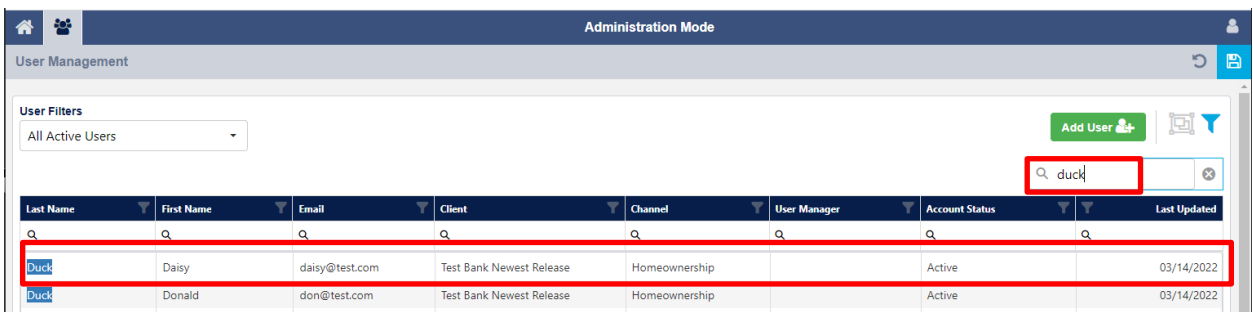
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



***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

Record selected
Daisy Duck | daisy@test.com

Unsaved Changes 

Security Groups

<input checked="" type="checkbox"/>	Lending Partner
<input type="checkbox"/>	Lending Partner Admin
<input type="checkbox"/>	Lending Partner Associate
<input type="checkbox"/>	Lending Partner Read Only

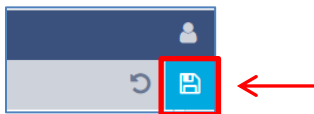
Select All Deselect All

Departments

<input type="checkbox"/>	Lender QC
<input checked="" type="checkbox"/>	Lending Partner (Default)
<input type="checkbox"/>	Loan Officer

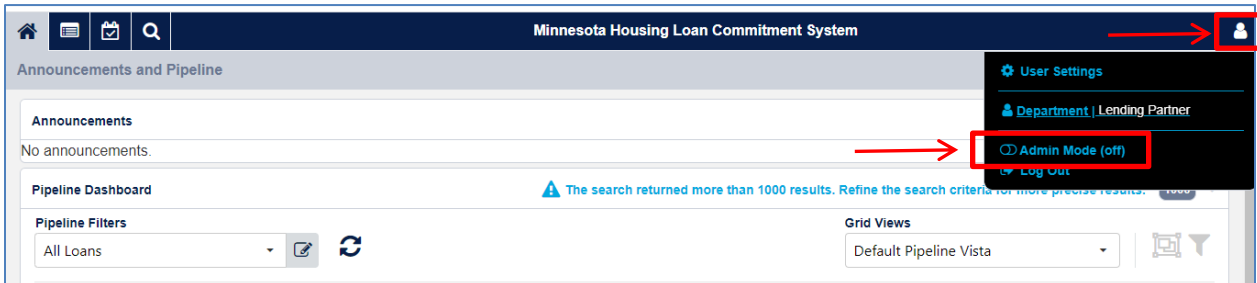
Select All Deselect All

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

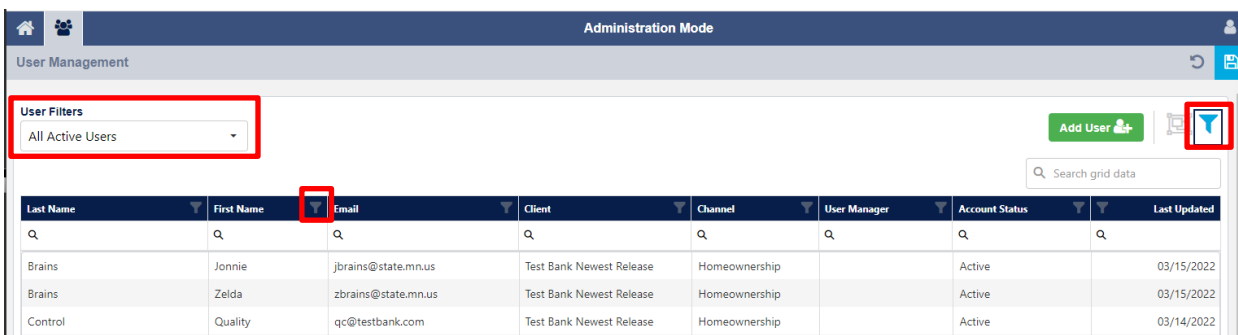


Adding or Updating Licensing Information for a User

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



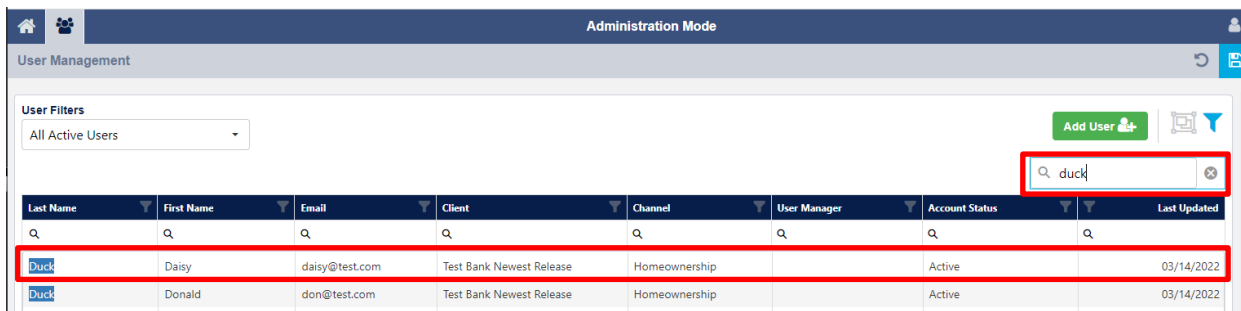
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



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

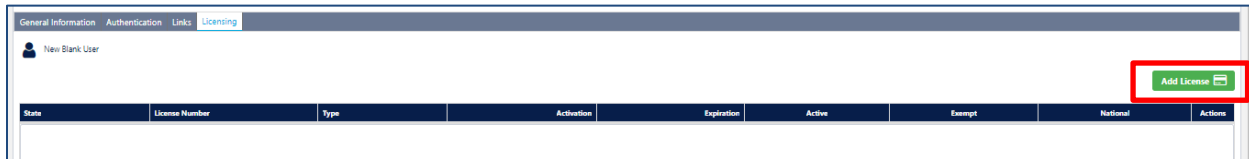
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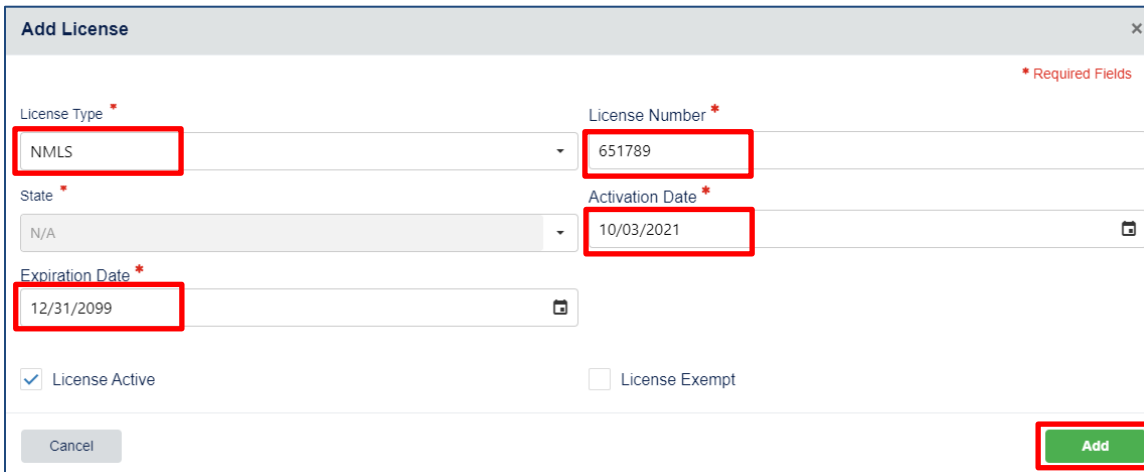


- Double-click on the User that you would like to manage.

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



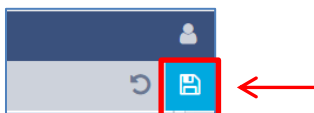
- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
 - License Type
 - Type NMLS will display Loan Officer’s NMLS# on the documents
 - License Number
 - State auto fills N/A when NMLS is selected
 - Activation Date (date user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



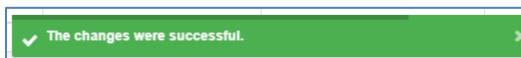
- To modify License, click on the pencil in the Action column.



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

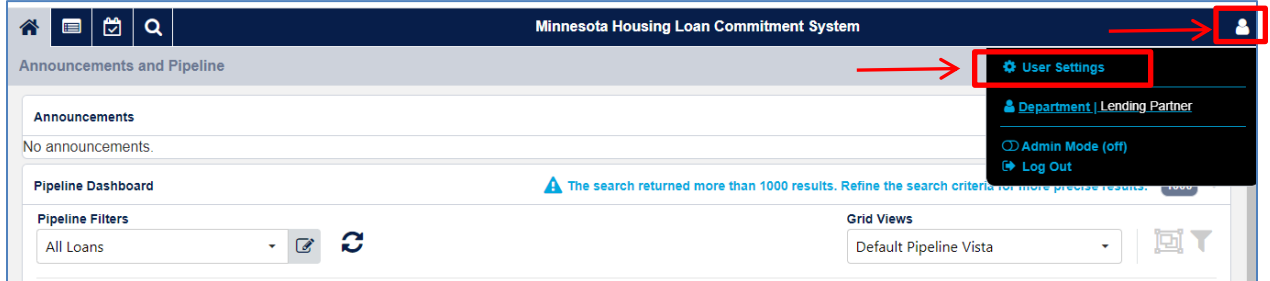


- This notification will display:



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:

