Web Administrator System Guide

November 1, 2019

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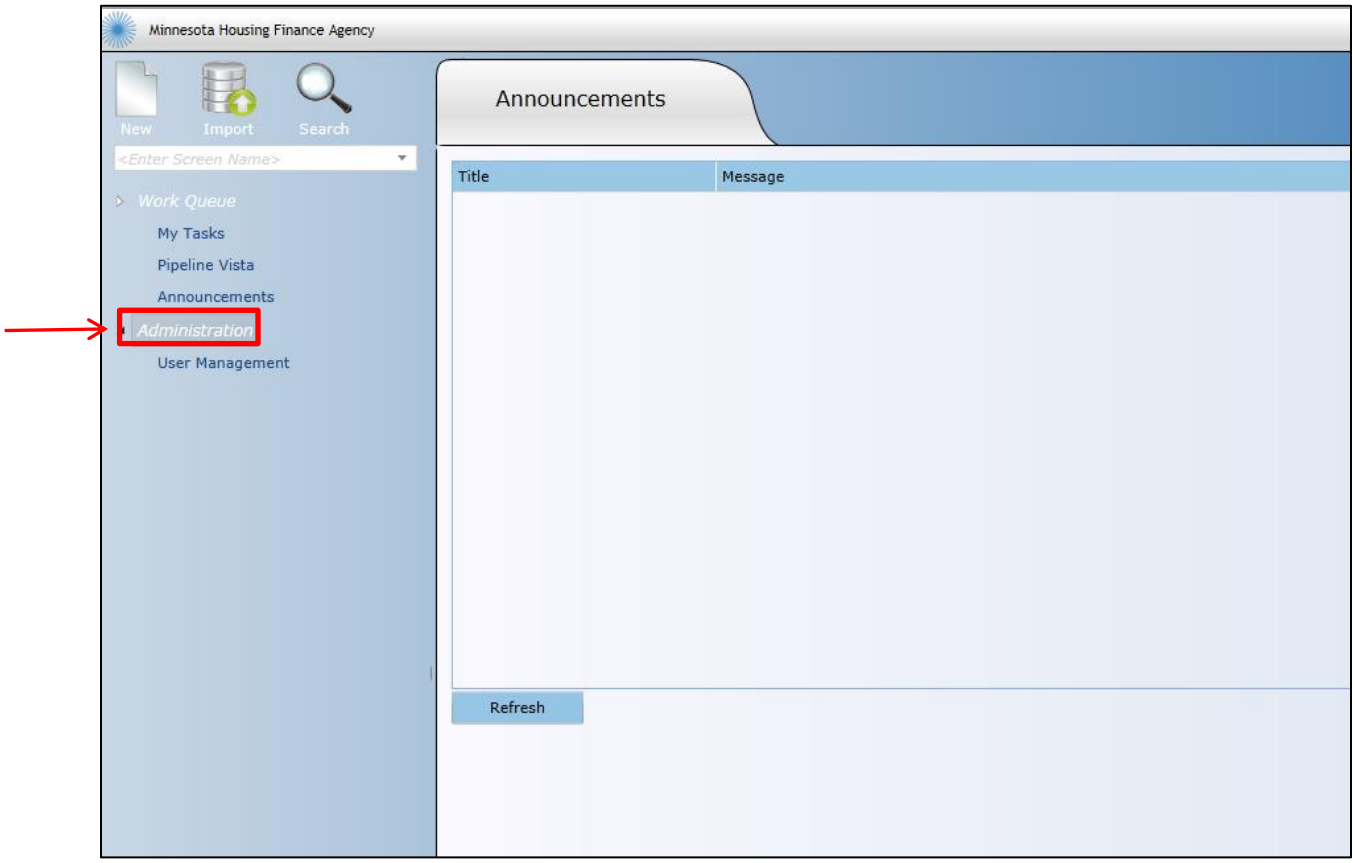
Setting up a New User

- Log into the Online Commitment System.

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

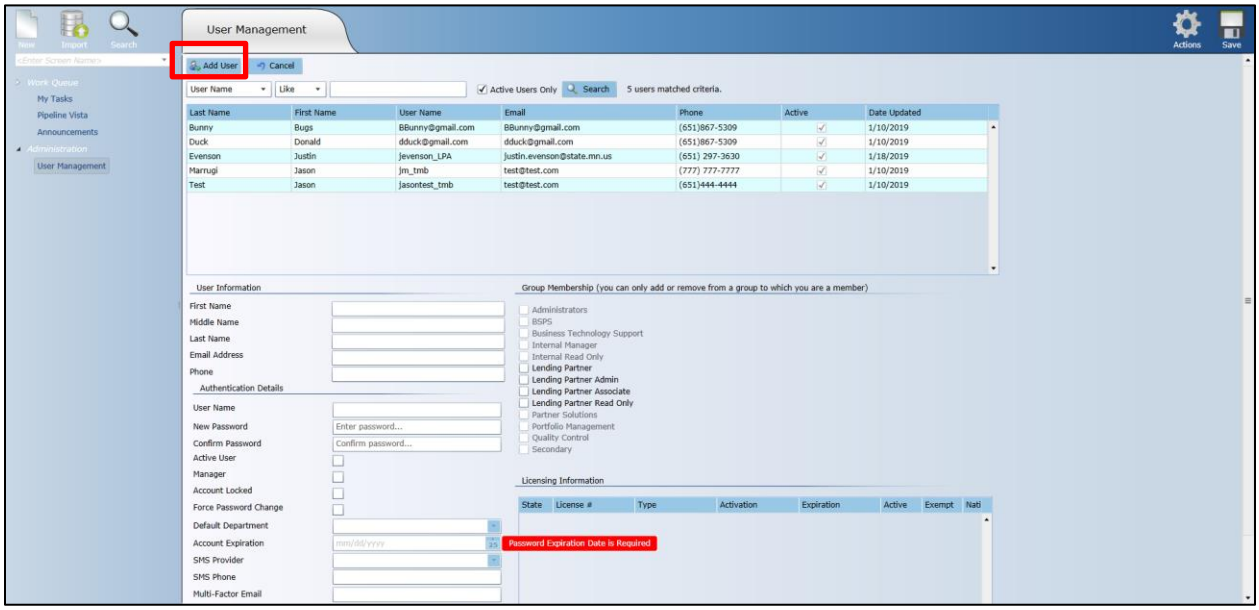
To create a New User

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

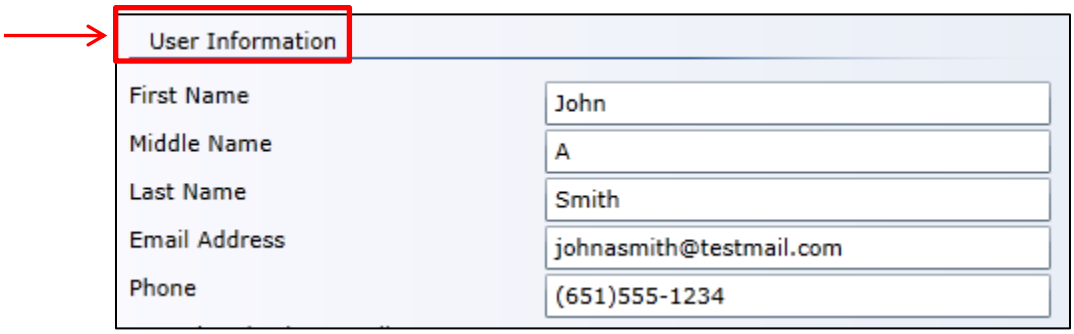


- Select the **Add User** icon in the top Left corner of the page.

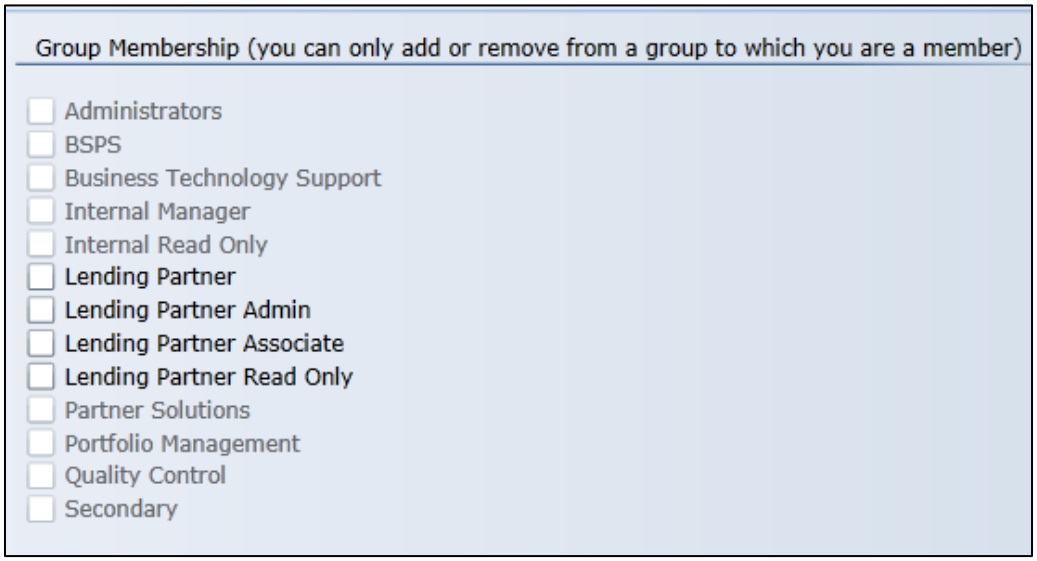
***Note:** You will not be able to enter information in the corresponding fields until this icon is selected.



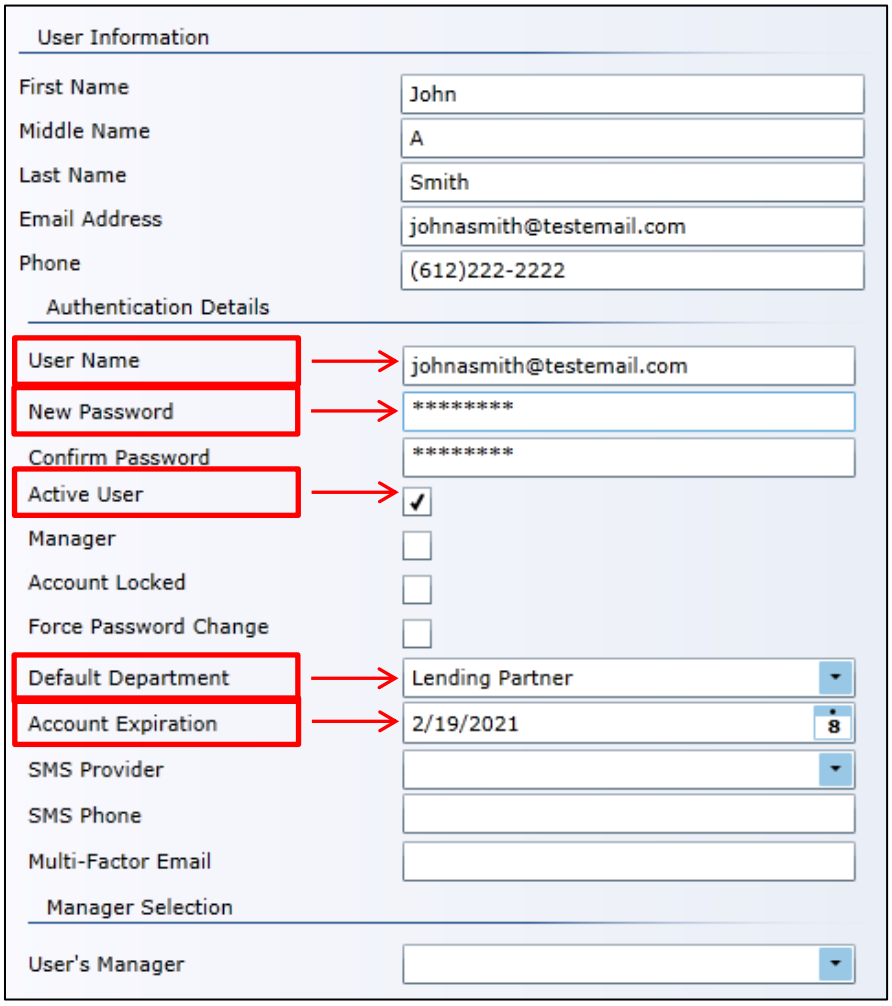
- Complete the following fields under **User Information**
  - First Name
  - Last Name
  - Email Address
  - Phone Number



- 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.

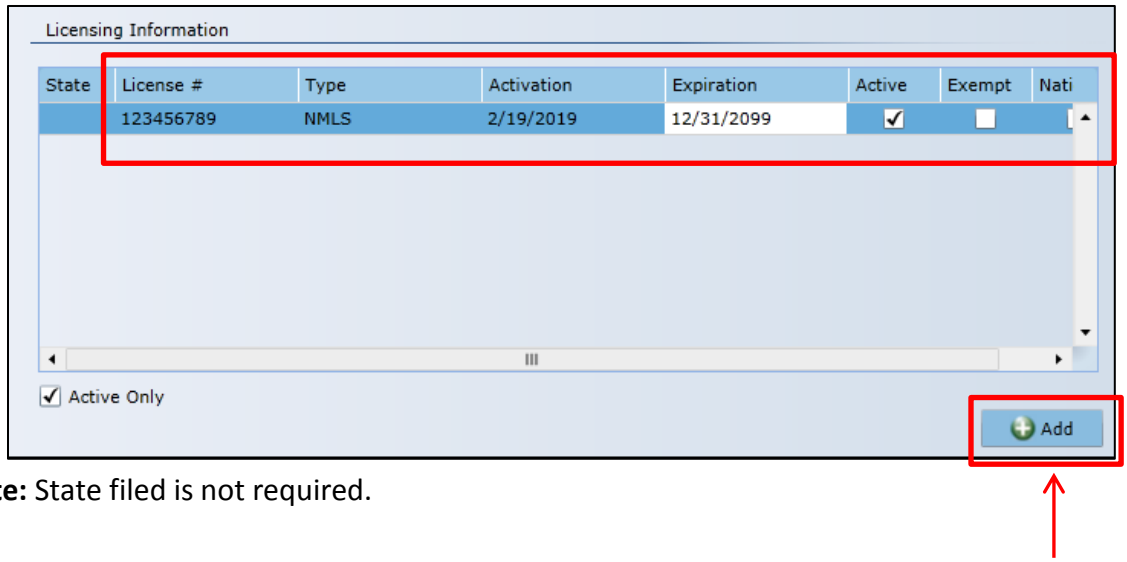


- Create an original User Name and Password in the fields under “Authentication Details:
  - User Name should be set as the person’s email address
  - Password Requirements:
    - Must contain at least 12 characters
    - Must contain at least one uppercase letter
    - Must contain at least one lowercase 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.



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

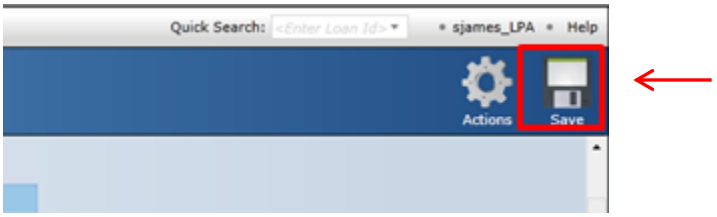
- Select the **Add** icon in the bottom right corner of the User Management screen and add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - License #
  - Type NMLS will display Loan Officer's NMLS# on the documents
  - Activation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



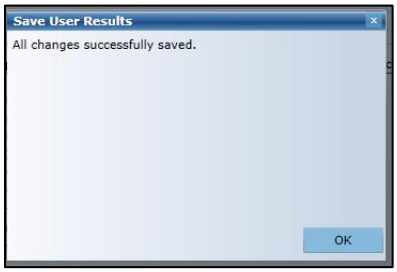
***Note:** State filed is not required.

- 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:

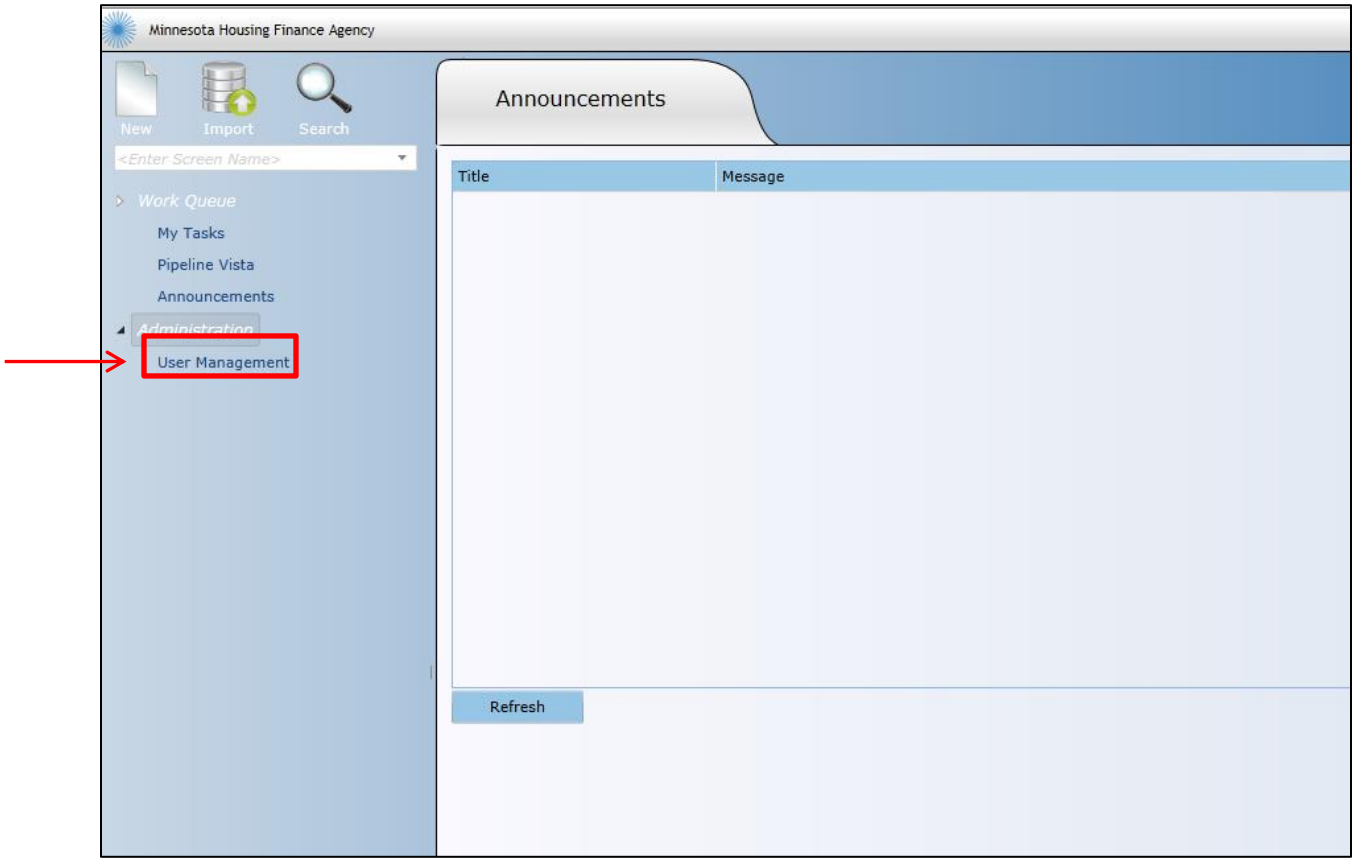


Managing a User

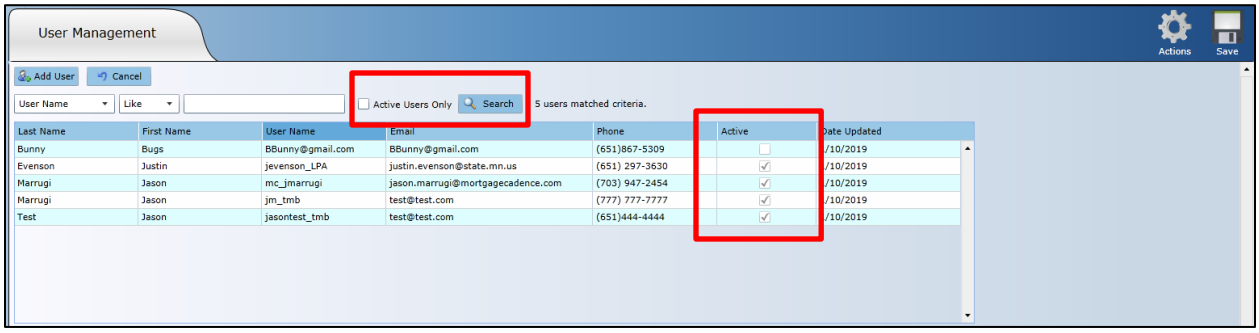
After logging into the Online Commitment System, the initial landing page will be the **Announcements** page.

To manage a current user

- Select **User Management**.

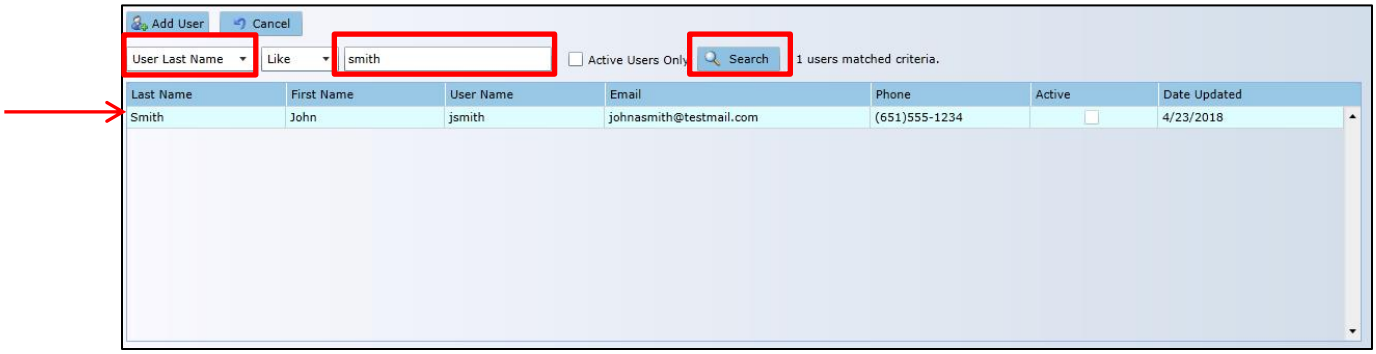


- Select the user from the list of active users:
  - Active users will be indicated by a checkmark in the active box.
  - Users that are not active can be found using the search button after unchecking the **Active Users Only** box.

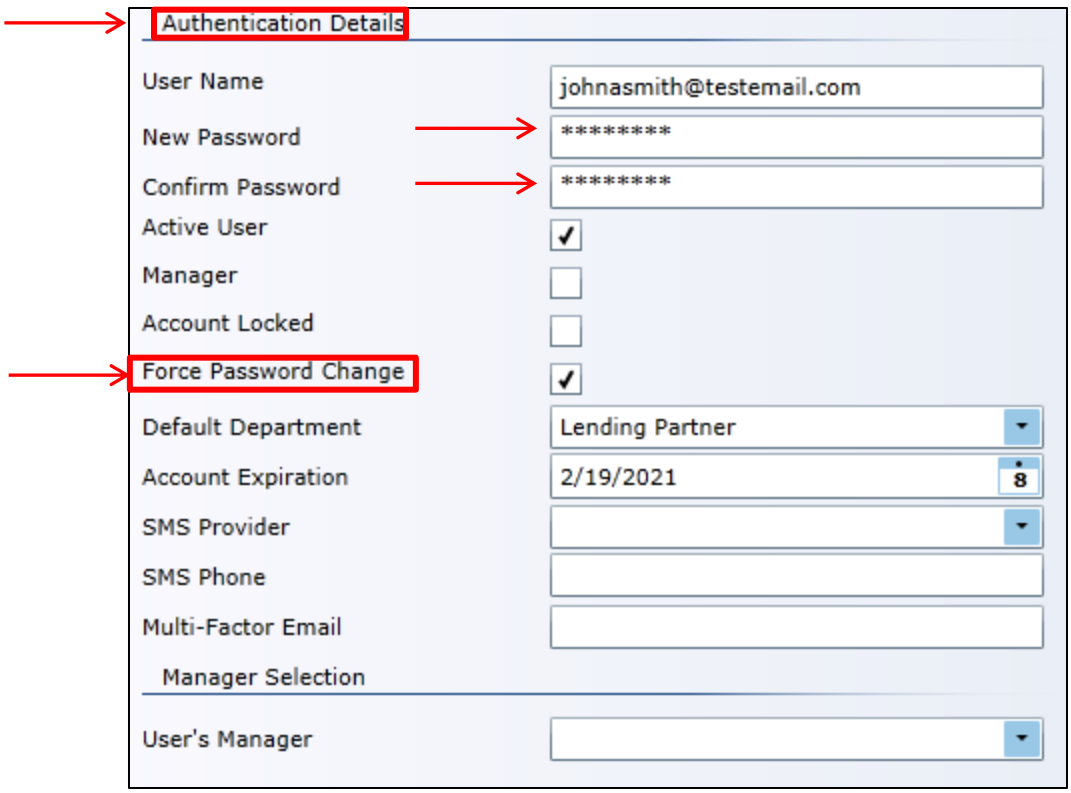


***Note:** You can search for users using the search box at the top of the screen.

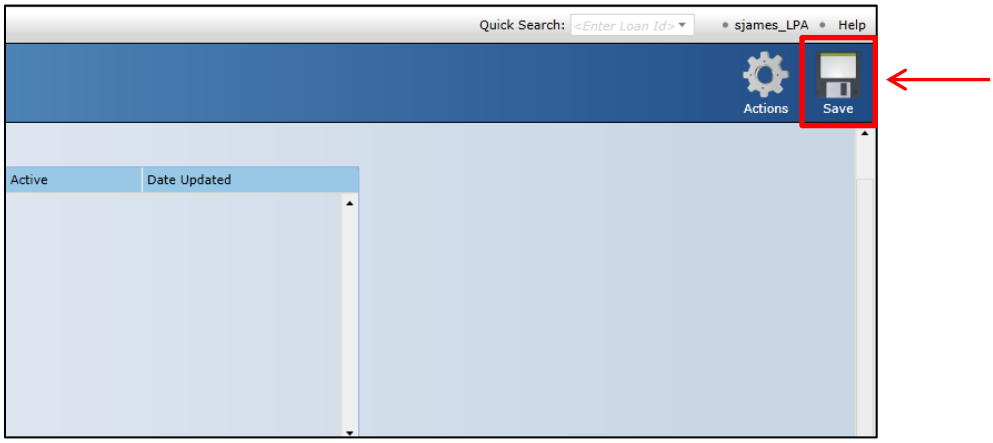
- Select either **User Name** or **User Last Name** from the dropdown menu. Then, type in the name you are looking for and select the **Search** icon.



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

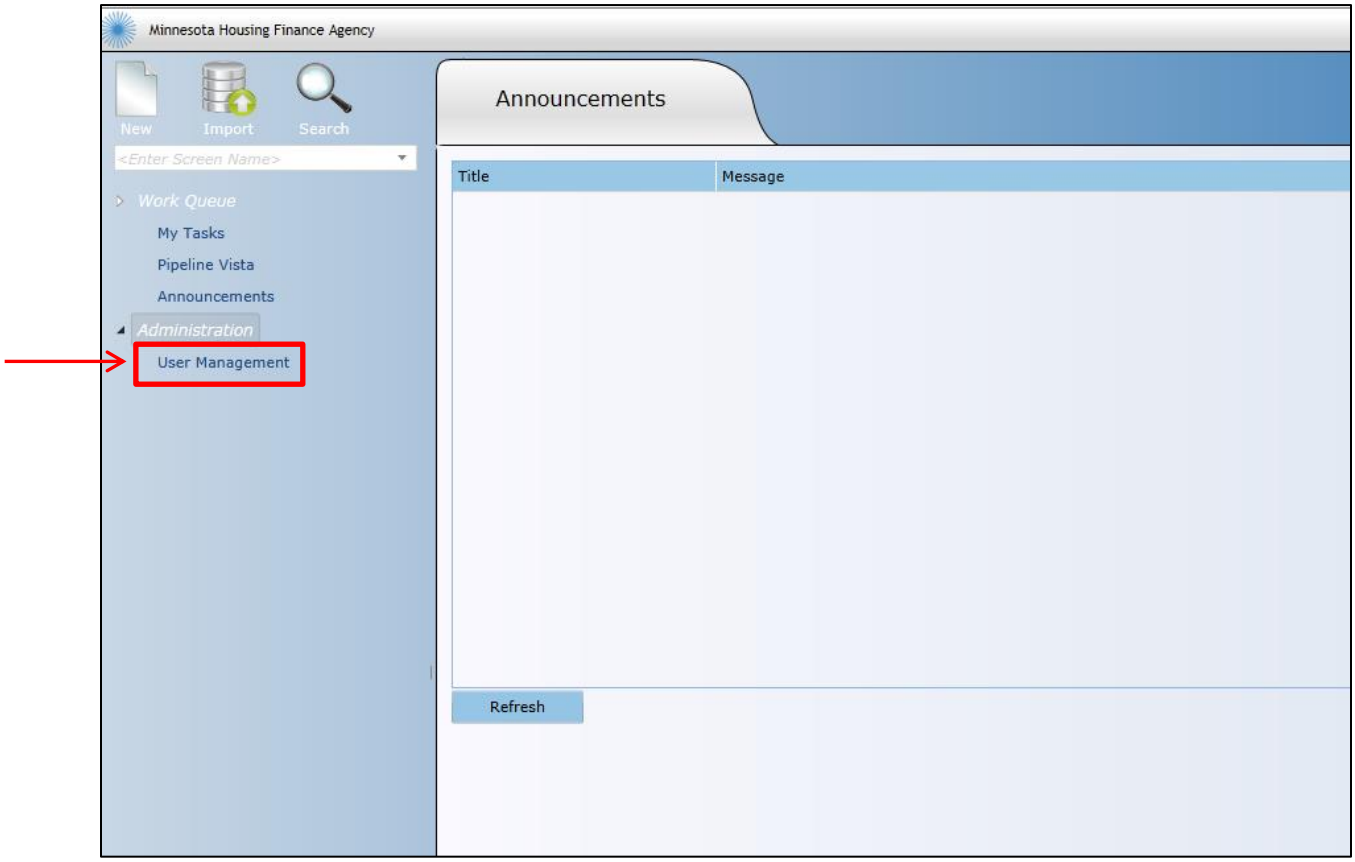


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.



Adding a User to a New Group

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



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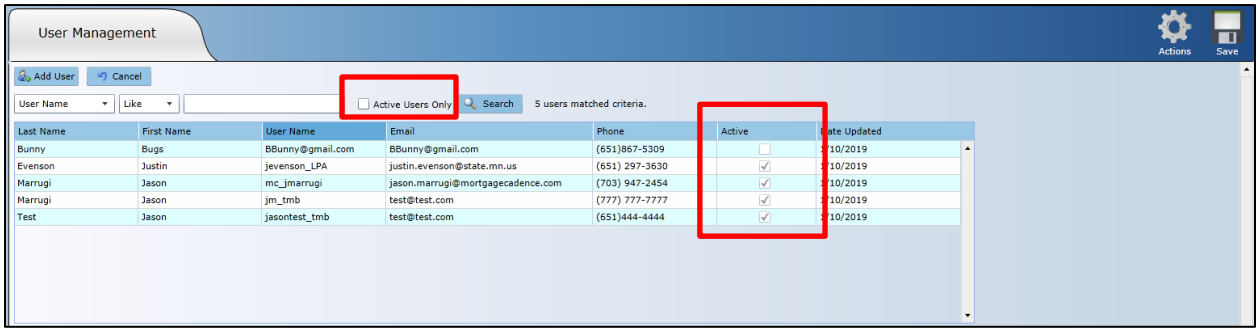

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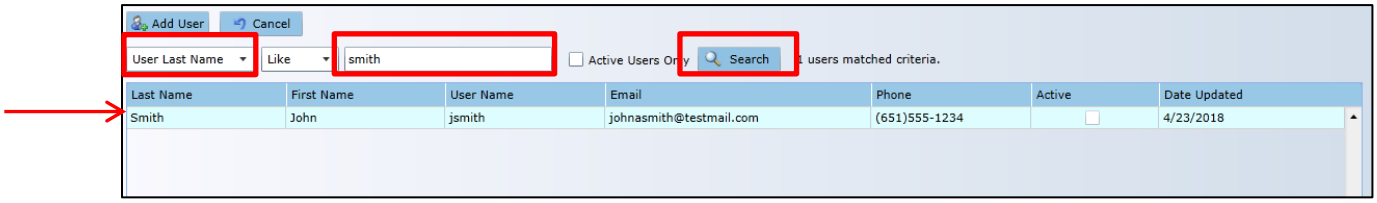
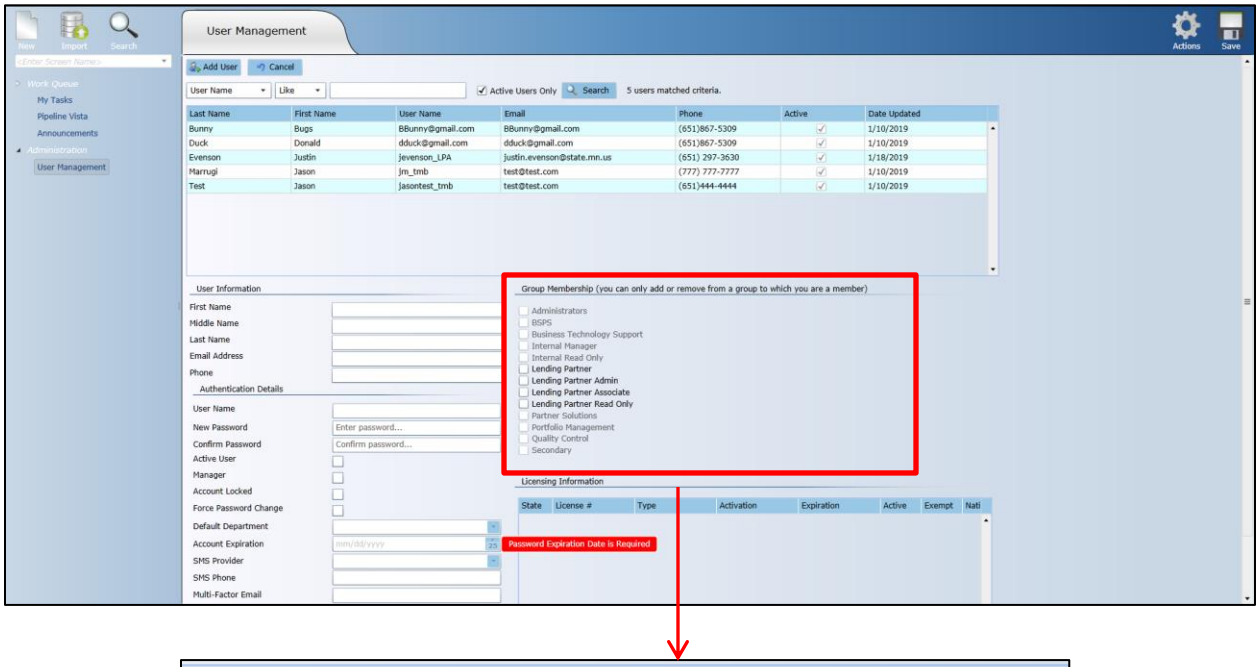
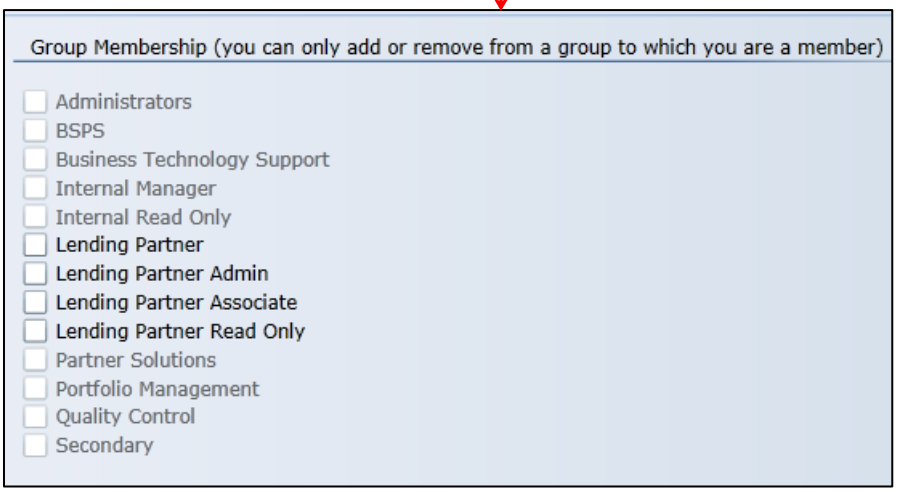
- Type in the name you are looking for and select the **Search** icon.

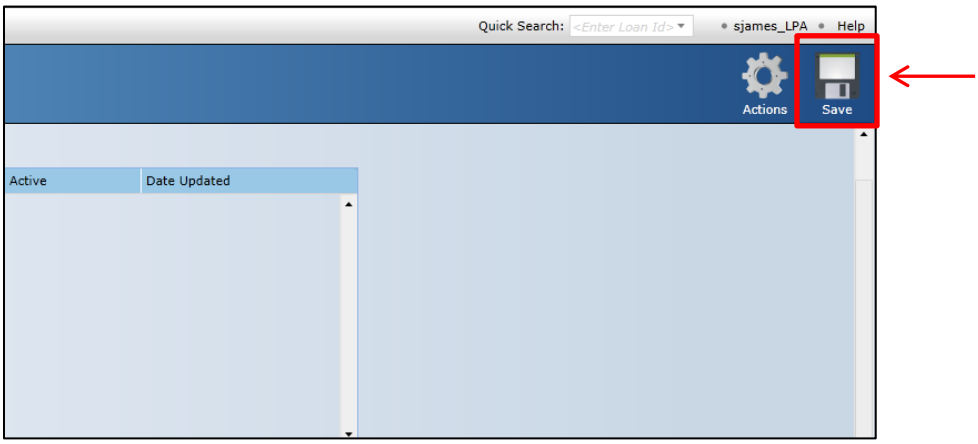


- Double-click on the User that you would like to manage.
- Select the boxes for the Group that the User is being added to:



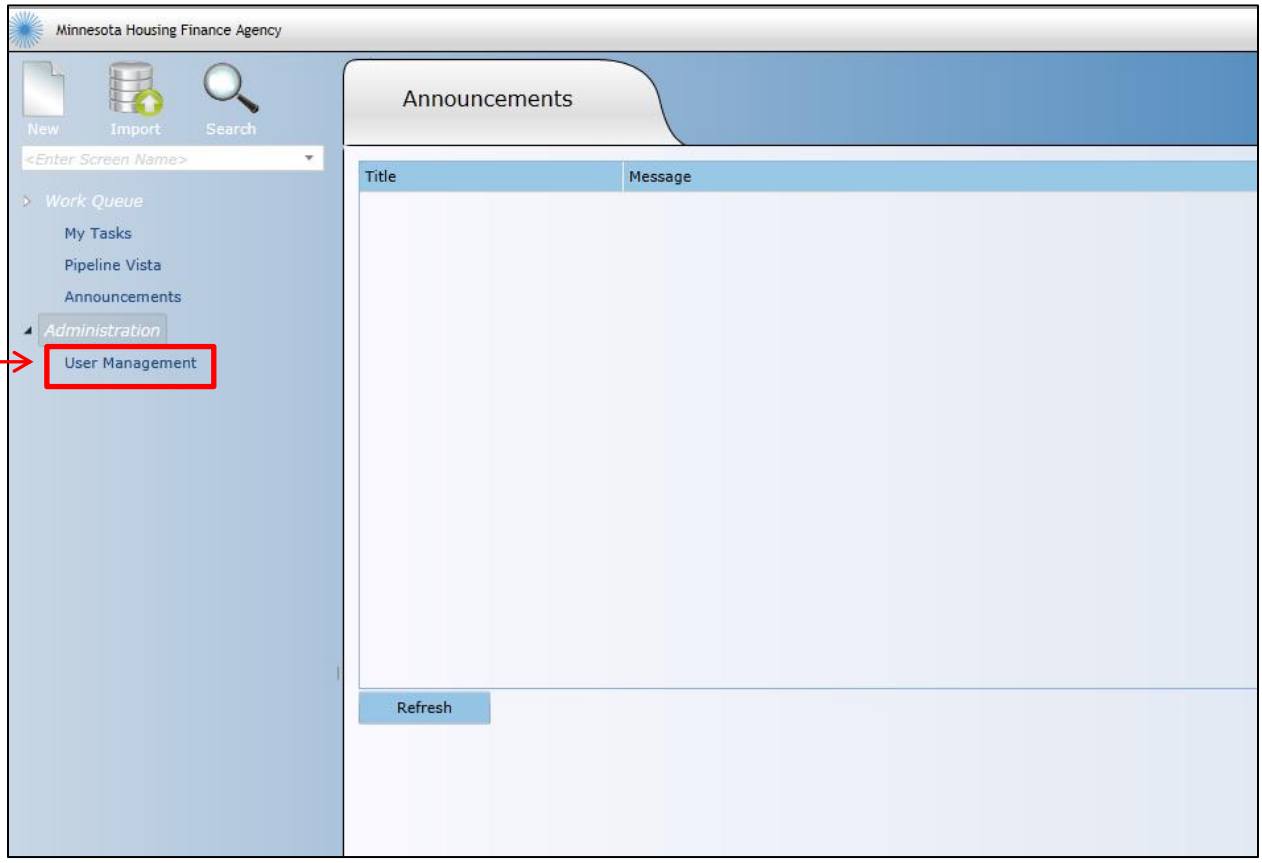


- Select the **Save** icon in the top Right corner of the screen.



Adding or Updating Licensing Information for a User

- Select **User Management**.



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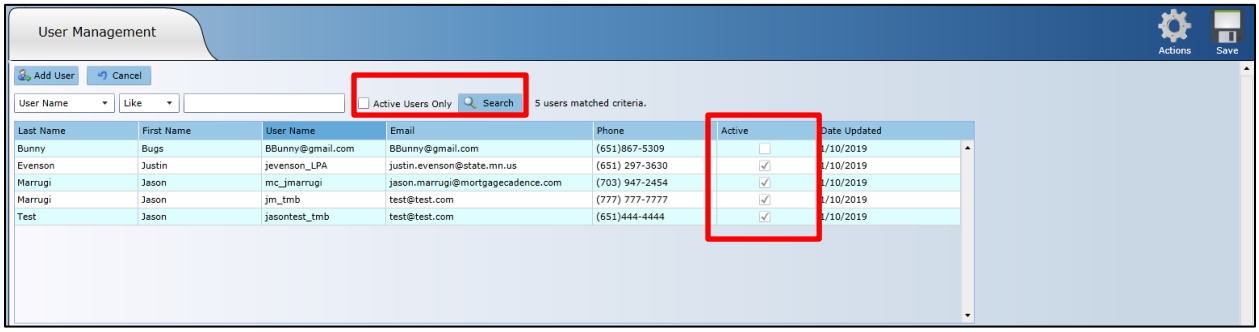

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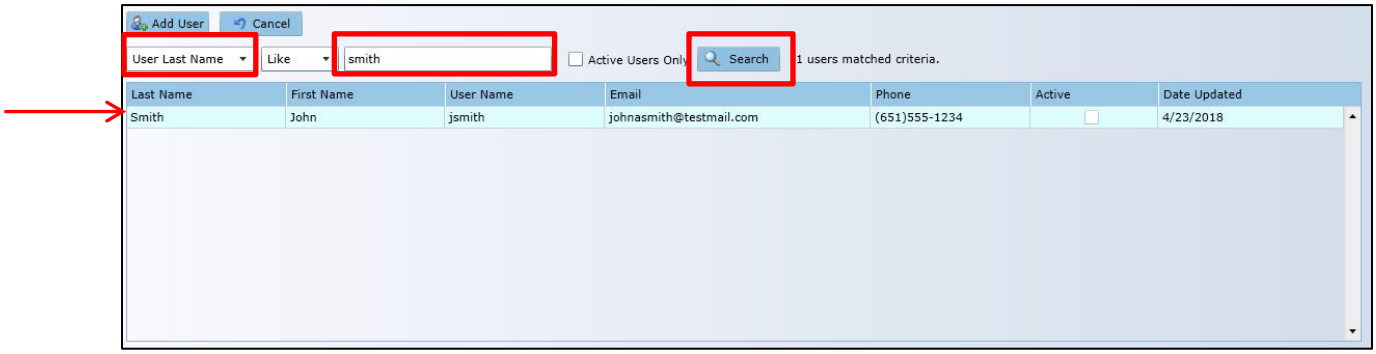
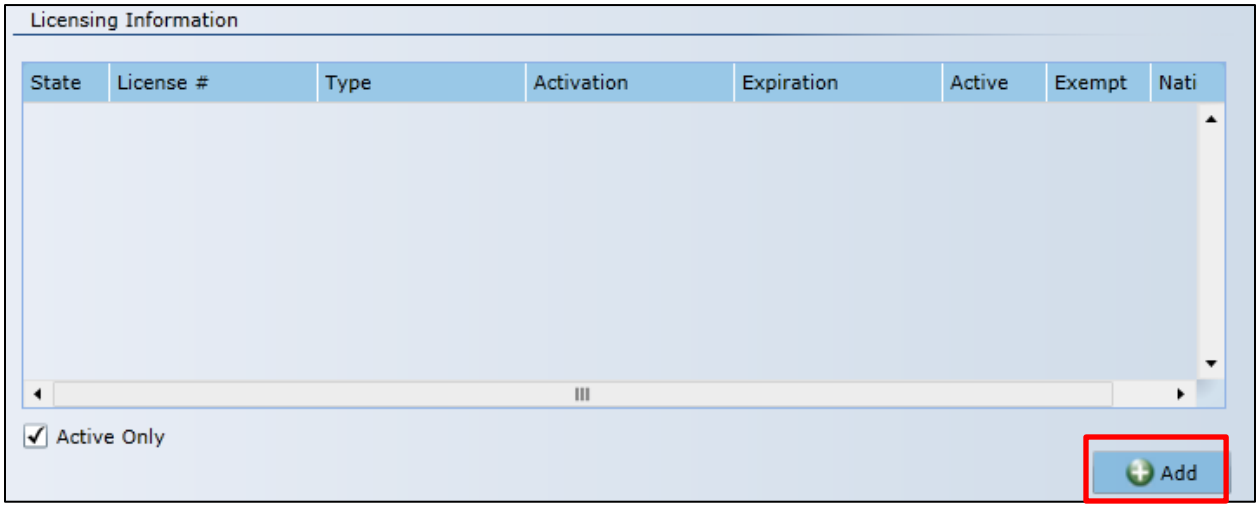
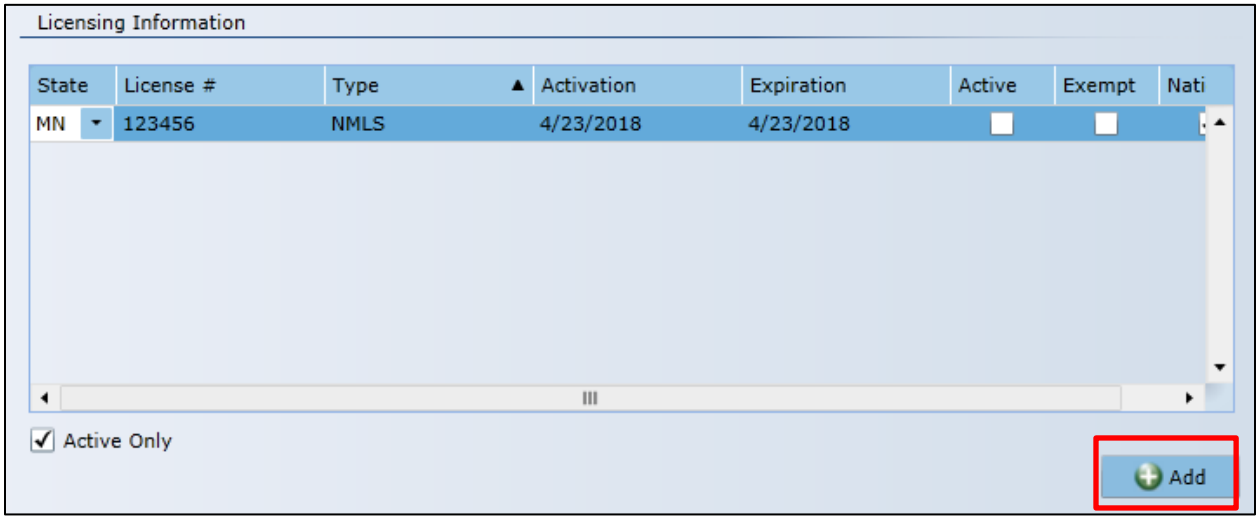
- Type in the name you are looking for and select the **Search** icon.

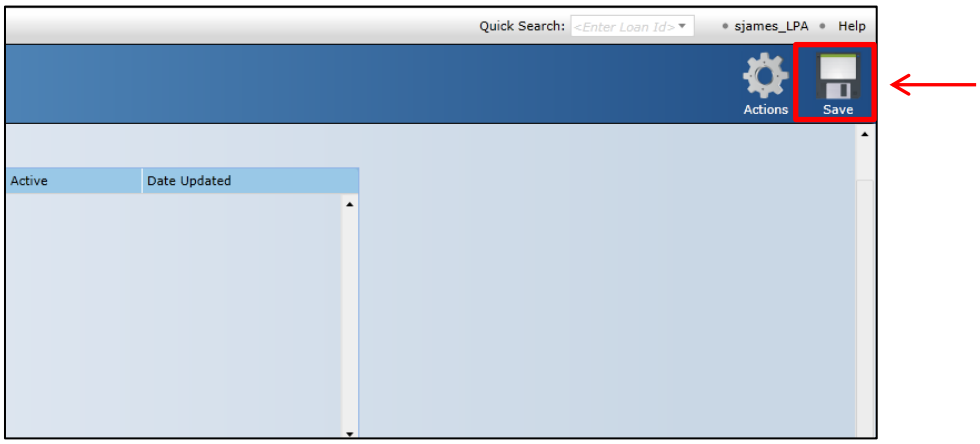


- Double-click on the User that you would like to manage
- Select the **Add** icon in the bottom right corner of the **User Management** screen.

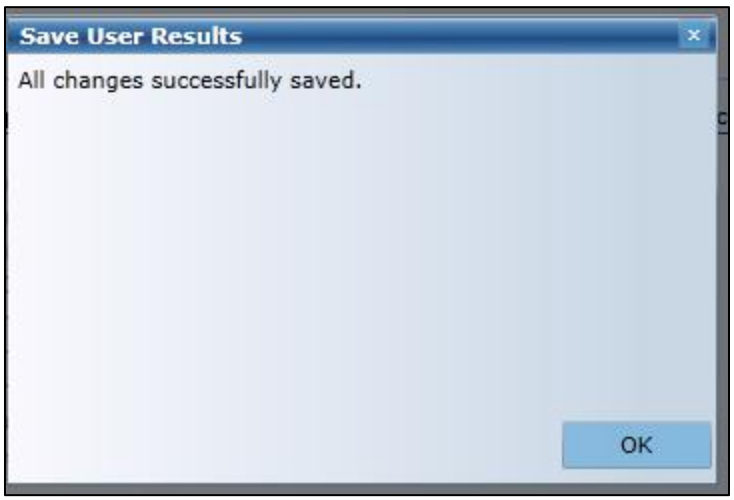




- Add the following required Licensing Information to the existing user. Click on the fields to select options for the dropdown menu:
    - License #.
    - Type (i.e. NMLS).
    - Activation Date (date user is added).
    - Expiration date (enter 12/31/2099).
    - Check “Active” box.
    - Select the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

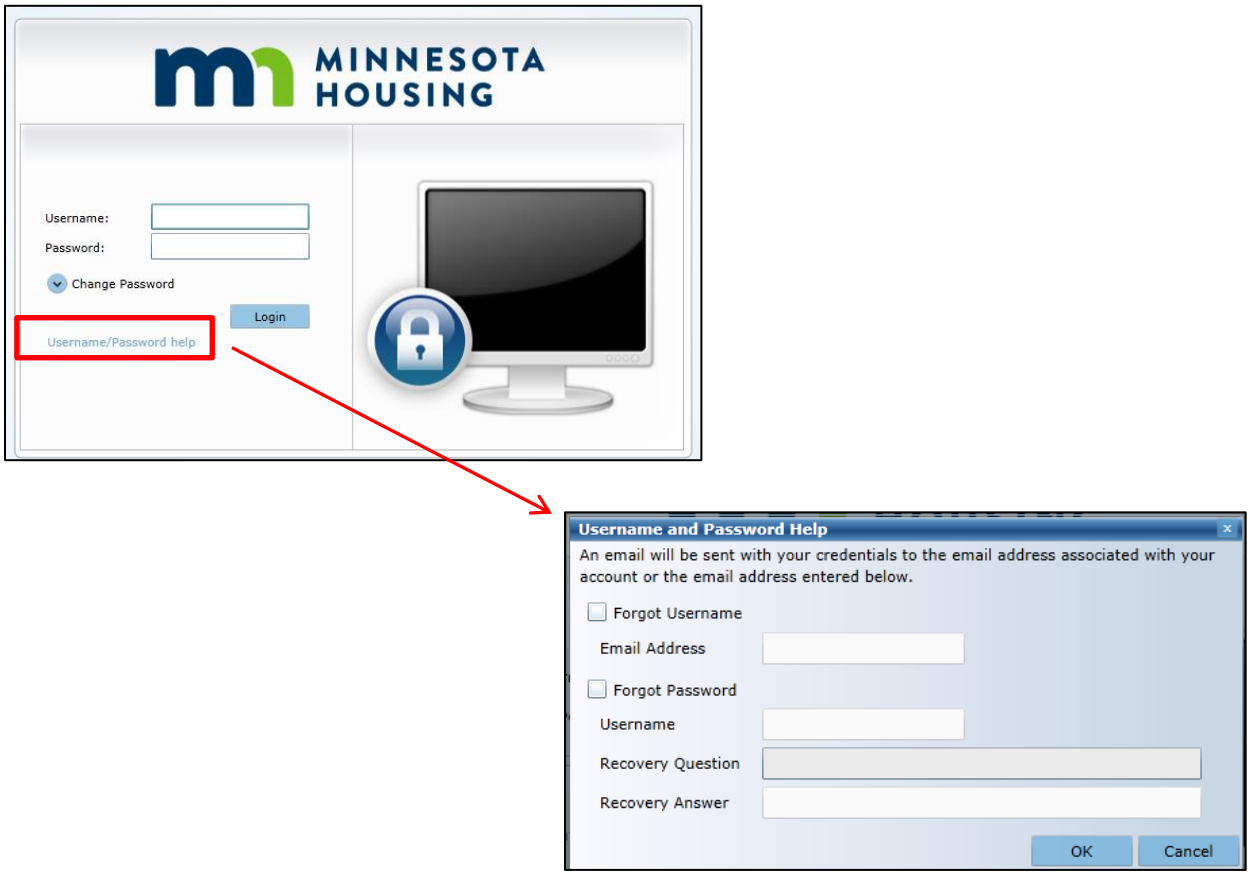


You will get this notification when all changes have been saved:

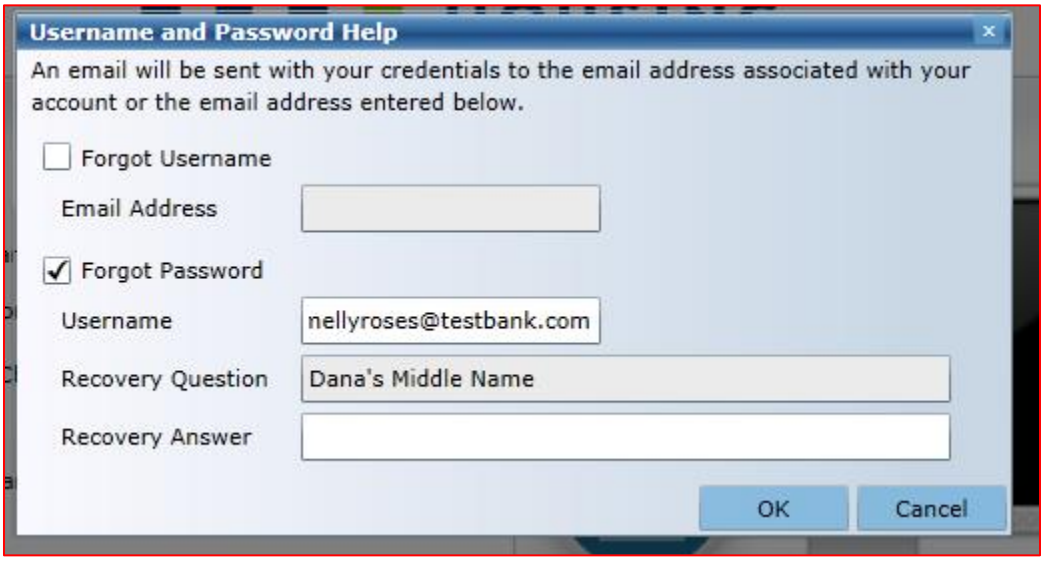


Username/Password Help

- 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



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