



# **Web Administrator System Guide**

*July 15, 2025*

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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 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.

*\*The web administrator should have all three Departments.*

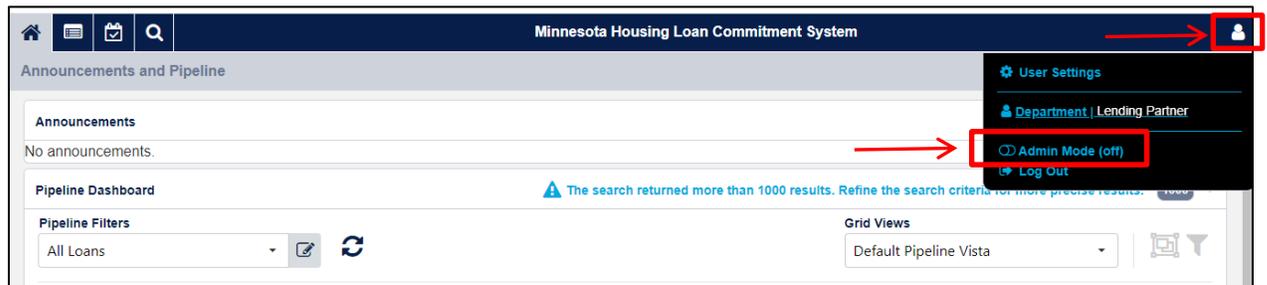
## Setting up a New User

- 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
  - Client (lender company name)
  - Choose a Channel
    - If lender is originating loans for multiple programs, select the most relevant channel:
      - Home Ownership
      - Home Improvement for Fix Up programs
      - Rehabilitation / Emergency
  - If the user originates loans for multiple programs, they will only be able to import a loan application under the channel assigned to them and will have to manually enter the loan under the other channel. Failure to select a channel will result in not being able to see the new user.

**\*Note:** Middle Name, Ext, Fax Number, Position, 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 work email address, not a general shared mailbox account.**
  - 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
- Even if checked, Force Password checkmark **does not save** when a user account is created. It is only saved after the user account is created, Force Password is checked and user account is saved.
 

**\*Note:** SSO Username, and PowerBI Username are not required fields.
- **Multi-Factor Authentication is required to log into the Loan Commitment System.**
- Users will need a code to login.
  - There are 2 options to receive this code: Work email address and via text using cell phone. NOTE if using cell phone, the cell phone carrier information (i.e. Verizon or AT&T) MUST be entered.
- Recommendation: Verify both multifactor fields are updated in the system.

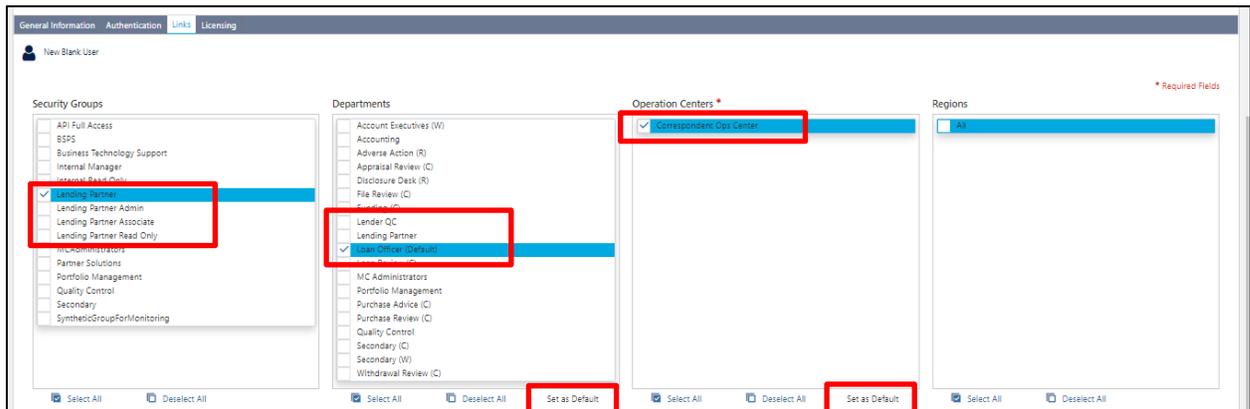
The screenshot displays the 'Authentication' configuration page for a 'New Blank User'. The 'Authentication' tab is selected, and a red asterisk indicates required fields. The following fields are highlighted with red boxes:

- Username:** example@lender.com
- Password:** [Redacted]
- Multi-Factor Email:** example@lender.com
- Multi-Factor Phone:** 1234567890
- Multi-Factor SMS Provider:** Verizon

Other visible fields include SSO Status (set to 'SSO Inactive'), SSO Username, and 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** (Typically only one department is needed and must be set as Default):
  - **Lending Partner** Select this option for anyone who is not a loan officer, but needs access to the system
  - **Loan Officer** Allows the Loan Officer name to be assigned to the loan in our commitment system.
  - **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.
- IF Multiple Departments are needed (Typically only one department is 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



- **IMPORTANT:** 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 contains the following fields and options:

- License Type \***: Dropdown menu with 'NMLS' selected (highlighted with a red box).
- License Number \***: Text input field with '651789' entered (highlighted with a red box).
- State \***: Dropdown menu with 'N/A' selected.
- Activation Date \***: Date picker field with '10/03/2021' entered (highlighted with a red box).
- Expiration Date \***: Date picker field with '12/31/2099' entered (highlighted with a red box).
- License Active**:  (checked)
- License Exempt**:  (unchecked)
- Buttons**: 'Cancel' and 'Add' (highlighted with a red box).

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

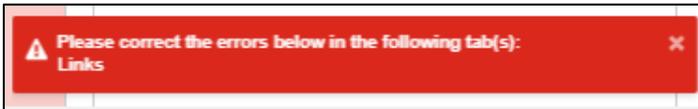
- Once all fields have been completed, select the **Save** icon in the top Right corner of the screen to complete the New User account.



- If done correctly, the following notification will display:

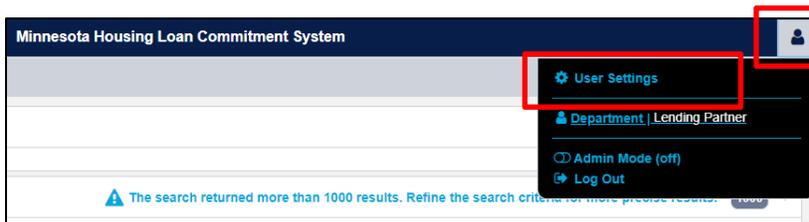


- If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.

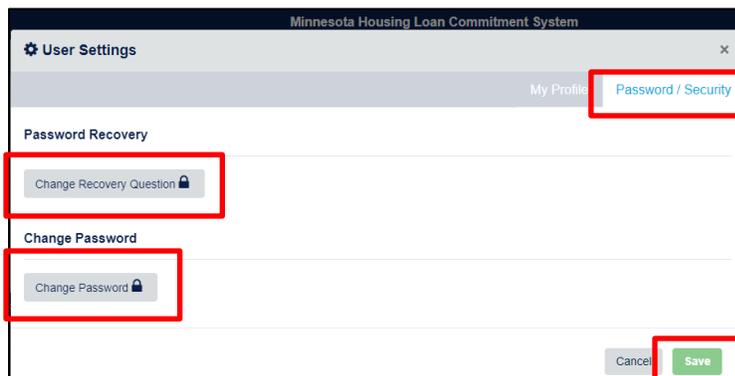


*Recommendation: Test the new user. Log in as the new user if able to login, email new user their username and password.*

- 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.



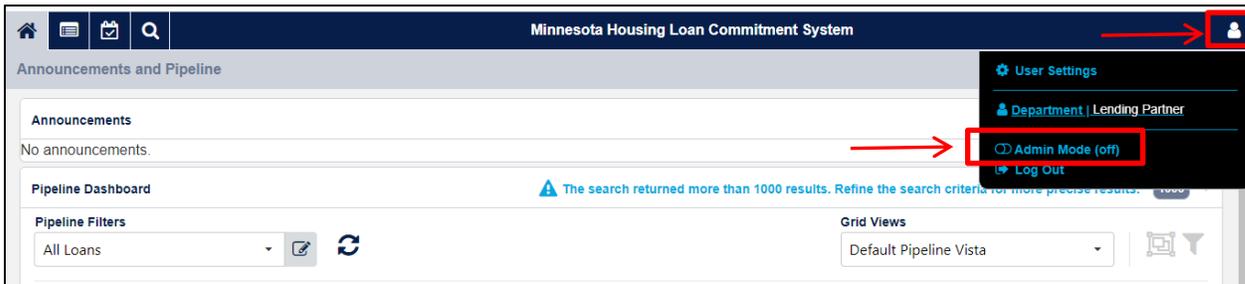
- Select “Password/Security” tab.
- Set up a new password and username/password recovery question.



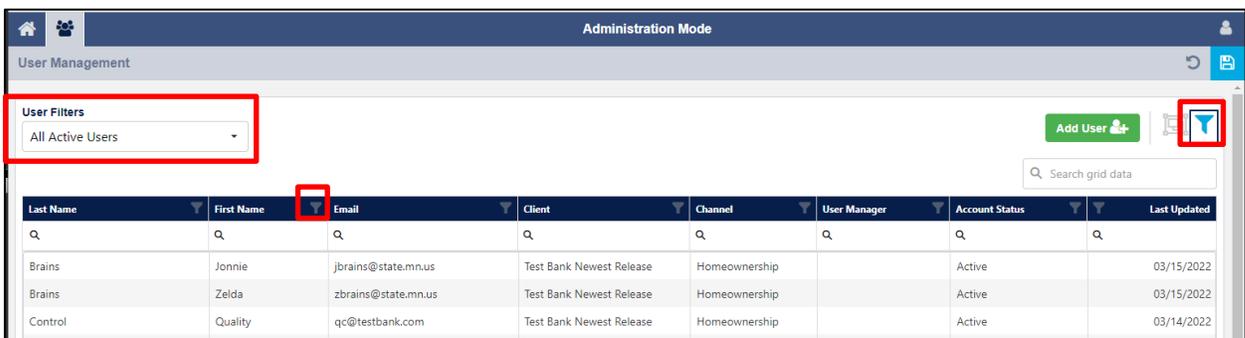
## Managing a User

### To manage a current user

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



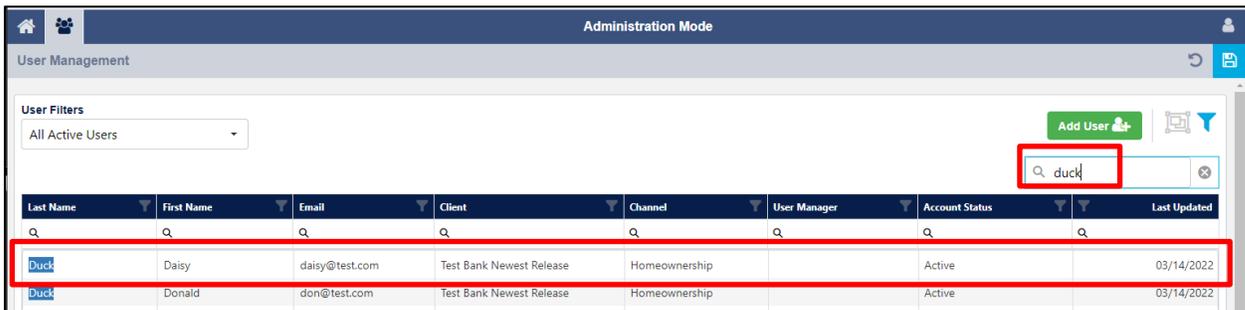
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

Or

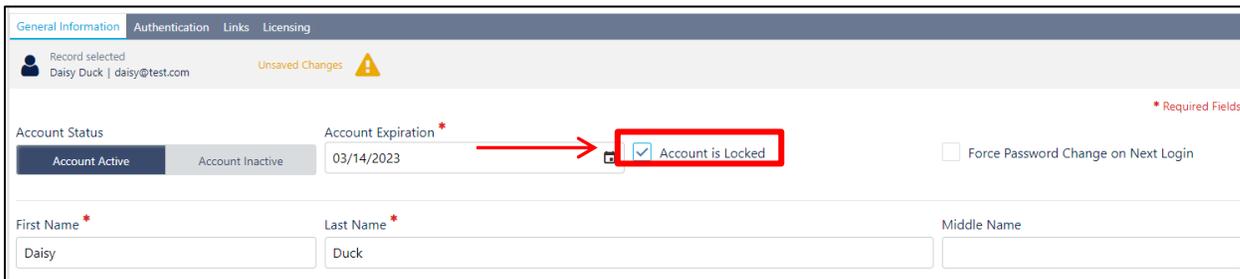
- Type in the name you are looking for in the **Search grid data** text box.
  - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



- 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.

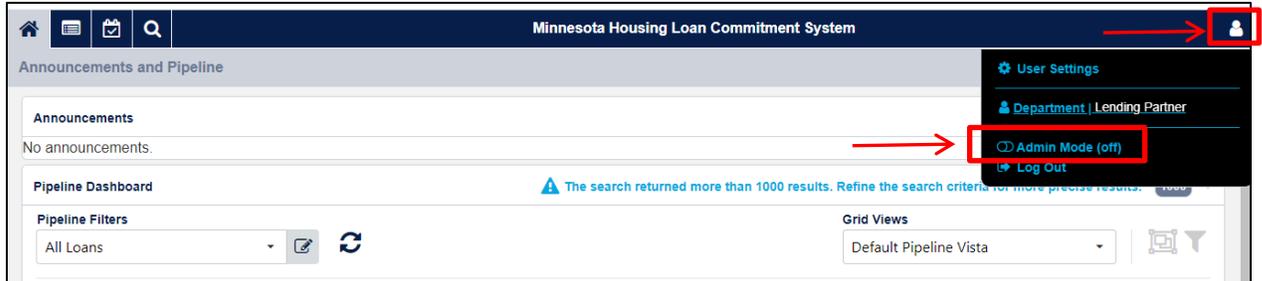


- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

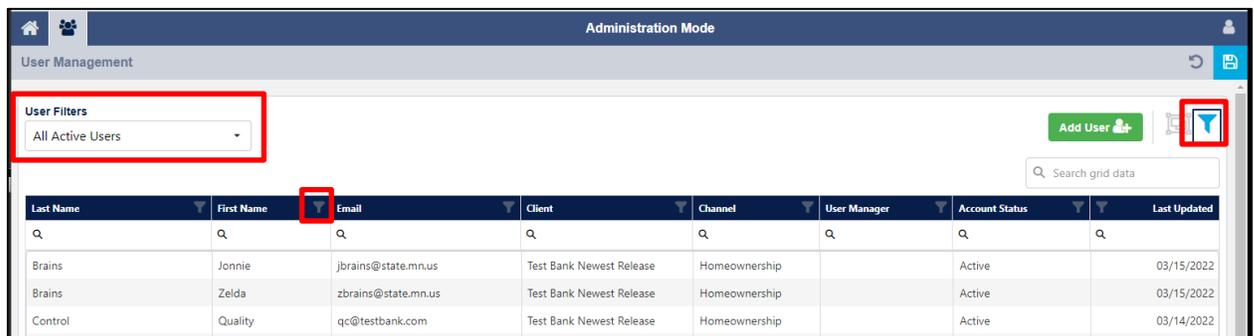


## Adding a User to a New Group or Department

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



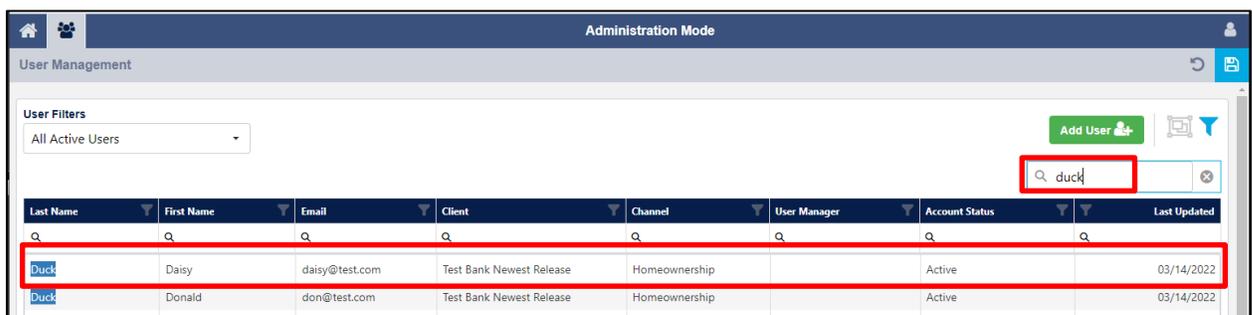
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



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

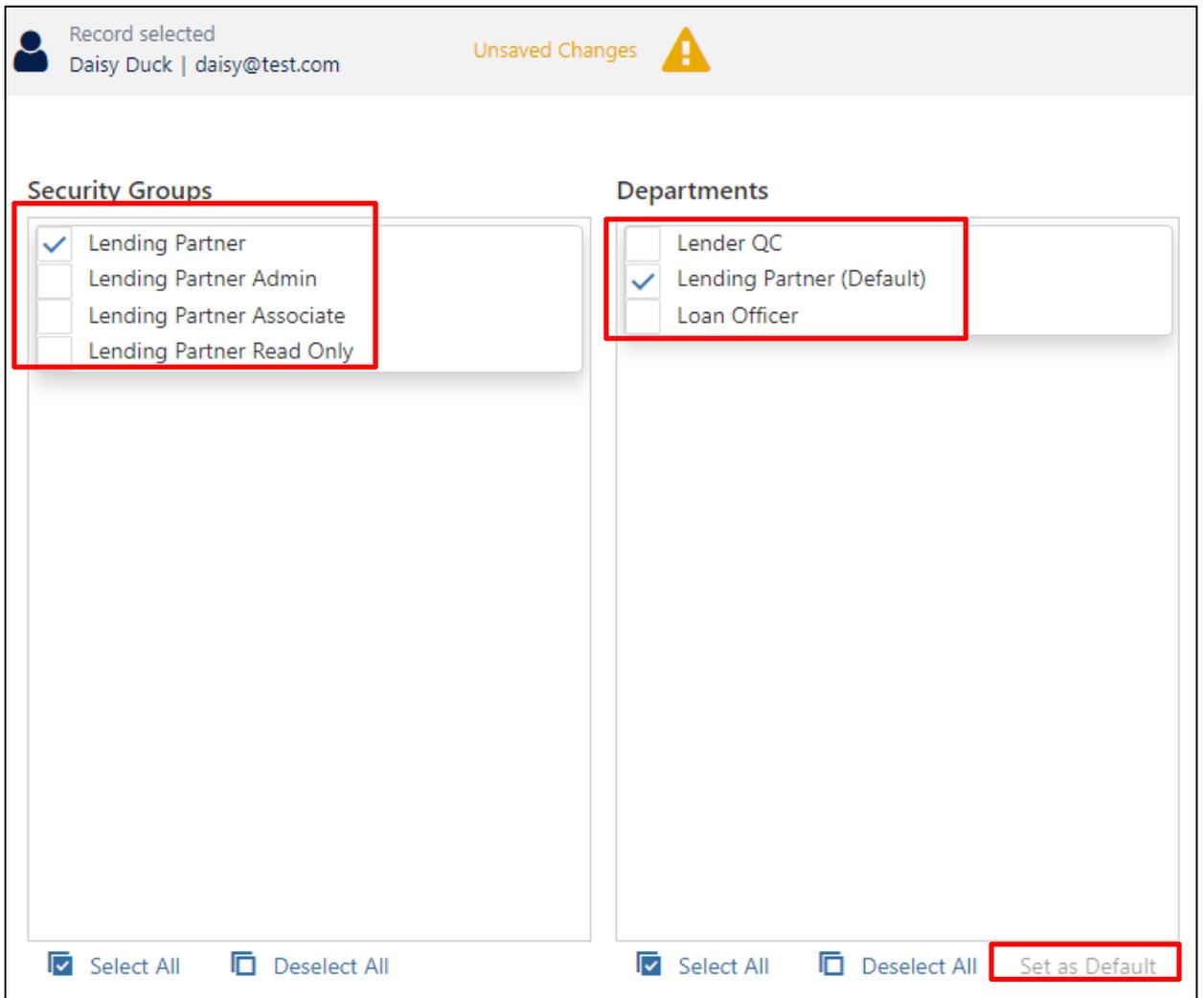
Or

- 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

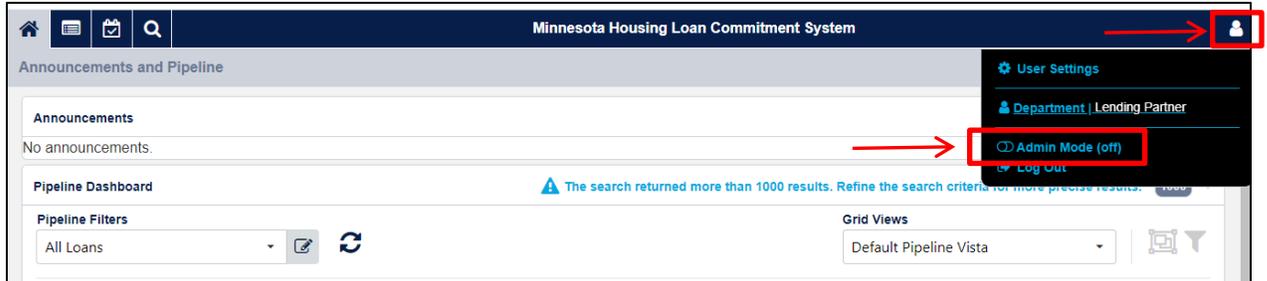


- Select the **Save** icon in the top Right corner of the screen.

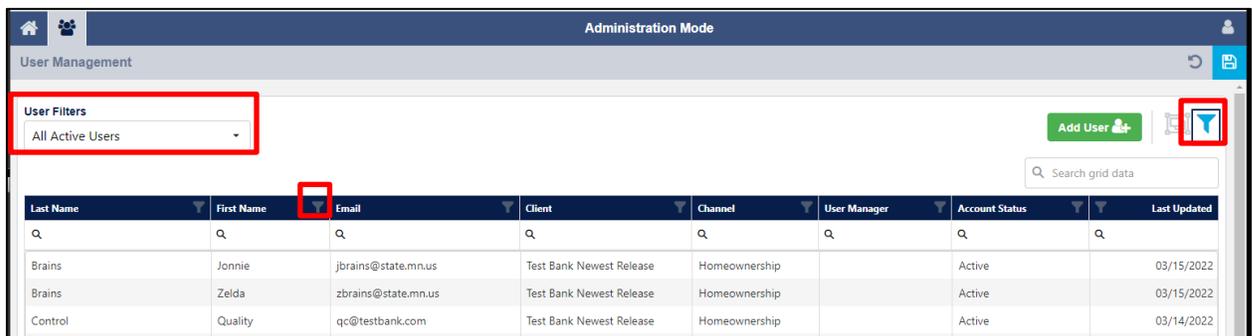


## Adding or Updating Licensing Information for a User

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



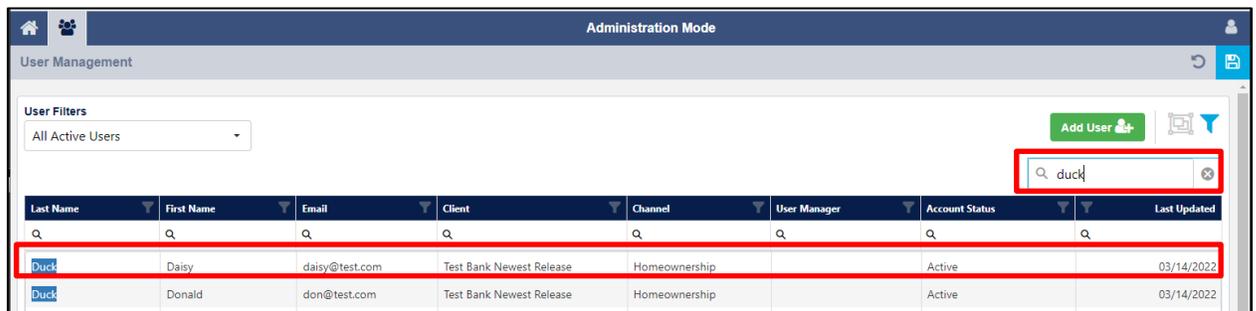
- Select the user from the list of active users:
  - Users that are not active can be found using User Filters: All Users.



**\*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.

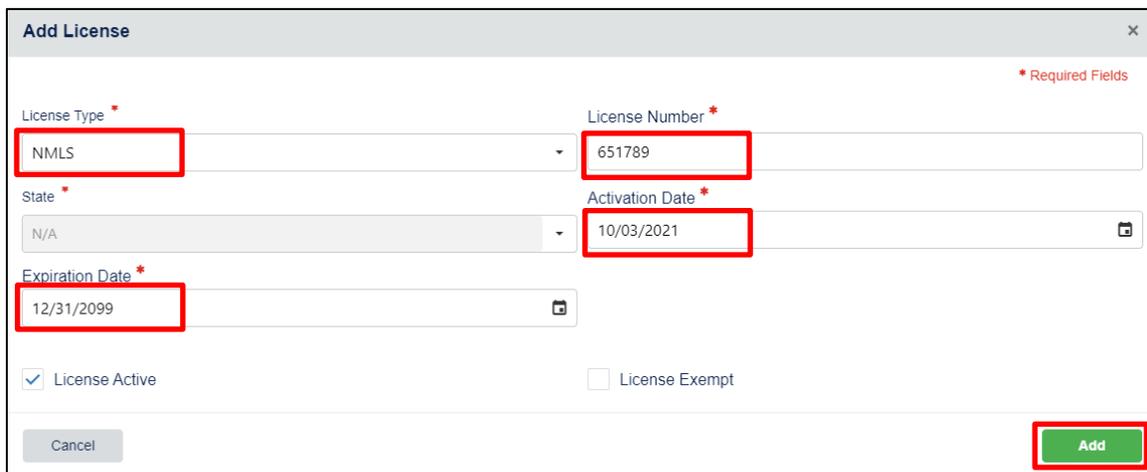


- Double-click on the User that you would like to manage.

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



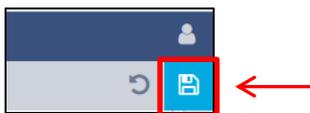
- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
  - License Type
    - Type NMLS will display Loan Officer’s NMLS# on the documents
  - License Number
  - State auto fills N/A when NMLS is selected
  - Activation Date (date 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.

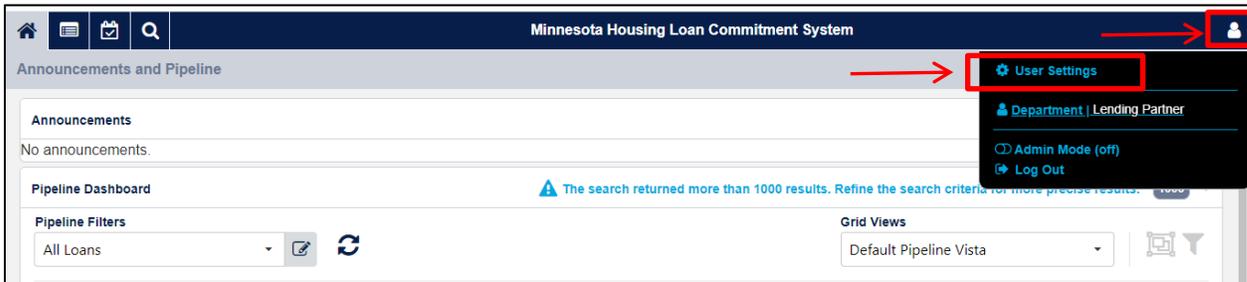


- This notification will display:

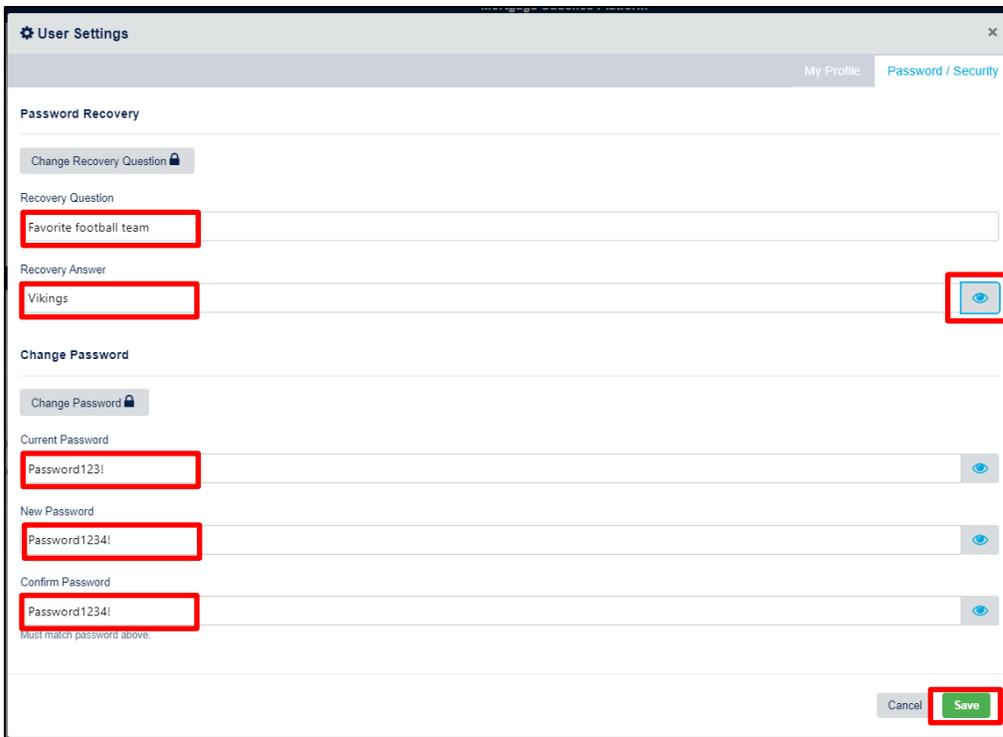


## Username/Password Help

- 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:

