

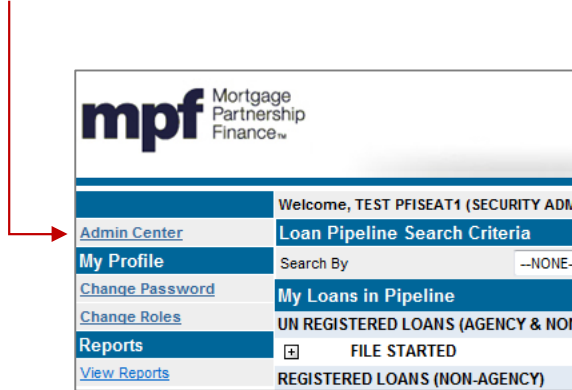
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## Security Management – Security

### Add New Users

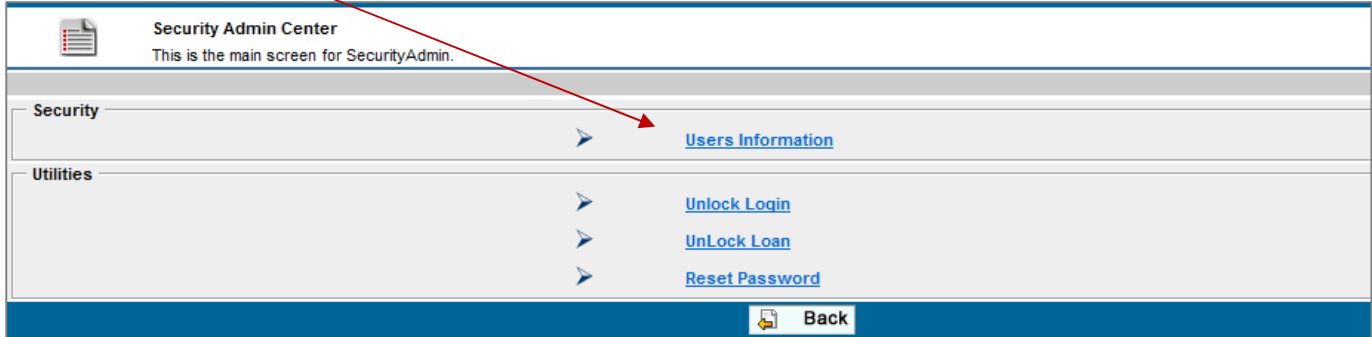
1) Select **Admin Center** from the left-hand navigation



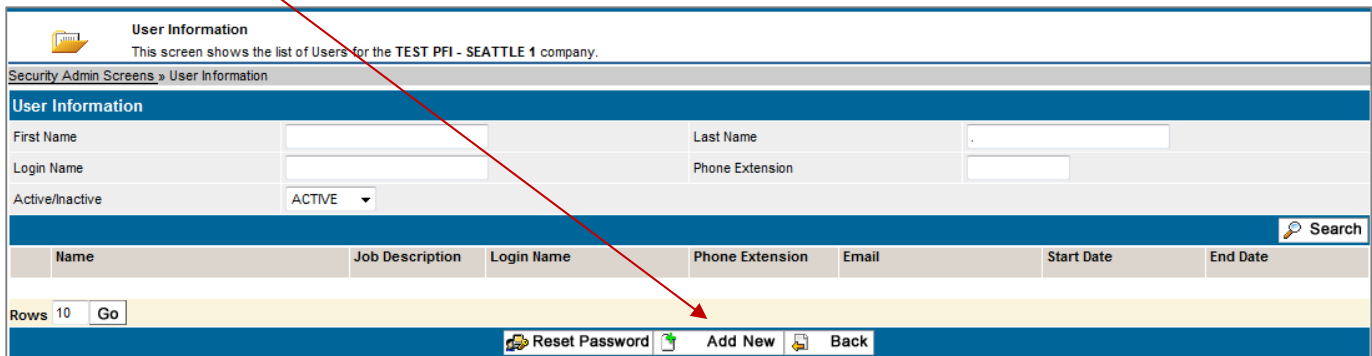
2) Select **Security Management**



3) Select **Users Information**



4) Click the **'Add New'** button



5) Enter information for the new user. Address, City, State and Zip will auto-populate with the Correspondent Company information. Select the Role. Hold down the Ctrl key to select multiple Roles.

**Note: The Notification Preference(s) are not in use at this time.**

Required fields (highlighted below) are: First Name, Last Name, Email Address, Phone Number, Time Zone, Role, and Login Name (note that login name will default to email address entered), Session Time Out (will be defaulted to 30 mins), Start Date (will be defaulted to current date/time), Max Sessions (will be defaulted to 1).

Available Roles:

- Correspondent Representative – ability to create loan manually or via 3.2 upload. User can upload docs, submit service requests. Cannot lock loans and cannot edit data once the loan is locked. Cannot view PFI Funding Schedule or authorize a loan for funding.
- MPF Direct Funding Approver – view only access to all screens except Doc Center; ability to view PFI Funding Schedule and authorize a loan for funding.
- Secondary Marketing – Read/Write access to all screens for all loans; Ability to register and lock all loans. Cannot view PFI Funding Schedule or authorize a loan for funding.

- Security Admin – view only access to the Pipeline Search screen; full access to Admin Center to Create New Users, Edit Existing Users, Unlock (release) a login, Unlock (release) a loan, Reset Passwords. Cannot view PFI Funding Schedule or authorize a loan for funding.
- View Only – Read only access to all screens, all loans. Cannot view PFI Funding Schedule or authorize a loan for funding.

User Details			
This screen is used to add/edit a User Information for the TEST PFI - SEATTLE 1 company.			
Security Admin Screens » Edit Person Details			
User Information			
First Name	<input type="text"/>		
Middle Name	<input type="text"/>		
Last Name	<input type="text"/>	Notification Preferences	PEND NOTIFICATIONS
Address	ONE BELVEDERE PLACE	<a href="#">Description of Notification Preferences</a>	APPRAISAL NOTIFICATIONS
	<input type="text"/>		FUNDING NOTIFICATIONS
Zip	94941 - <input type="text"/>		
City & State	MILL VALLEY CA		
E-Mail	<input type="text"/>		
Phone Number	<input type="text"/> Ext <input type="text"/>	Alternate Phone Number	<input type="text"/> Ext <input type="text"/>
Fax Number	<input type="text"/>	Role	CORRESPONDENT REPRESENTATIVE
Time Zone	--NONE--		MPF DIRECT FUNDING APPROVER
Job Description	<input type="text"/>		SECONDARY MARKETING
			SECURITY ADMIN
			VIEW ONLY
Login Information			
Login Name	<input type="text"/>	Session Mgmt Table	SESSIONMGMT1
Session Time Out	30	Max Sessions	1
Start Date	05-19-2014 11:14AM PST	End Date	<input type="text"/> PST
<input type="button" value="Save"/> <input type="button" value="Back"/>			

6) Click the Save button to create the New User Account. An email will automatically be sent to the user with their Login ID and temporary password. Users are required to change their password the first time they access the Portal.

### Edit Existing Users

- 1) Navigate to the User Information screen (see instructions above). Click the link for the User you wish to edit.

**User Information**  
This screen shows the list of Users for the TEST PFI - SEATTLE 1 company.

Security Admin Screens » User Information

**User Information**

First Name: TEST Last Name: [ ]  
 Login Name: [ ] Phone Extension: [ ]  
 Active/Inactive: --ALL--

Search

Name	Job Description	Login Name	Phone Extension	Email	Start Date	End Date
<a href="#">TEST PFISEAT1</a>		TESTPFISEATTLE1@GMAIL.COM		TESTPFISEATTLE1@GMAIL.COM	02-27-2014 11:06AM PST	

Rows 10 Go

Reset Password Add New Back

- 2) Make the necessary changes and click the Save button to complete

**User Details**  
This screen is used to add/edit a User Information for the TEST PFI - SEATTLE 1 company.

Security Admin Screens » Edit Person Details

**User Information**

First Name: TEST Middle Name: [ ]  
 Last Name: PFISEAT1  
 Address: ONE BELVEDERE PLACE  
 Zip: 94941 City & State: MILL VALLEY CA  
 E-Mail: TESTPFISEATTLE1@GMAIL.COM  
 Phone Number: (415) 123-4567 Ext: [ ] Alternate Phone Number: [ ] Ext: [ ]  
 Fax Number: [ ]  
 Time Zone: PACIFIC STANDARD Role: CORRESPONDENT REPRESENTATIVE, MPF DIRECT FUNDING APPROVER, SECONDARY MARKETING, SECURITY ADMIN, VIEW ONLY  
 Job Description: [ ]

Notification Preferences: APPRAISAL NOTIFICATIONS, FUNDING NOTIFICATIONS, COMMITMENT NOTIFICATIONS

**Login Information**

Login Name: TESTPFISEATTLE1@GMAIL Session Mgmt Table: SESSIONMGMT1  
 Session Time Out: 30 Max Sessions: 1  
 Start Date: 02-27-2014 11:06AM PST End Date: [ ] PST

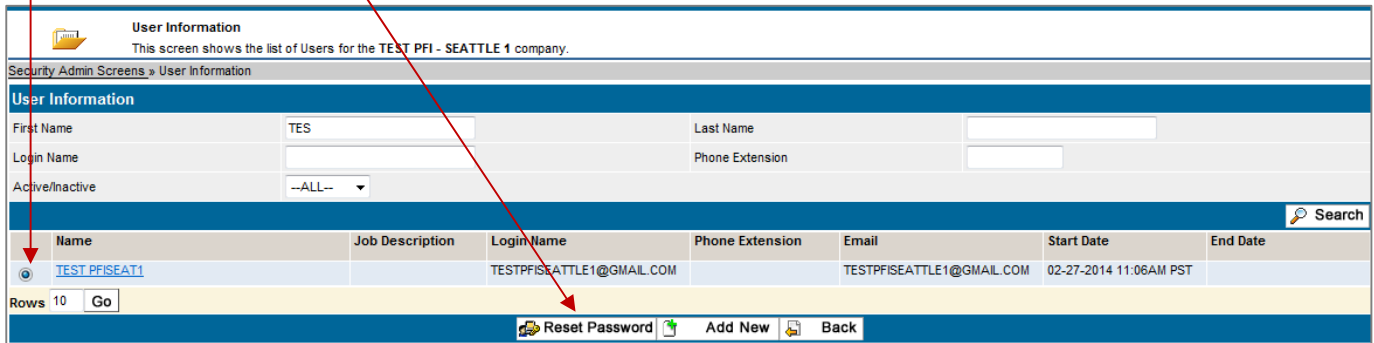
Save Back

### Inactivating Existing Users

- 1) To inactivate an existing user, enter an End Date and Time and click the Save button to complete. When the user attempts to login after that date/time, the user will be blocked from accessing the Portal.

### Reset Password

- 1) Navigate to the User Information screen (see instructions above)
- 2) Click the radio button for the applicable User
- 3) Click the 'Reset Password' button. An email will automatically be sent to the User with a new temporary password which must be changed the next time they login to the Portal.



**User Information**  
This screen shows the list of Users for the TEST PFI - SEATTLE 1 company.

Security Admin Screens » User Information

**User Information**

First Name: TES  
Last Name: [ ]  
Login Name: [ ]  
Phone Extension: [ ]  
Active/Inactive: --ALL--

Name	Job Description	Login Name	Phone Extension	Email	Start Date	End Date
<input checked="" type="radio"/> TEST PFISEAT1		TESTPFISEATTLE1@GMAIL.COM		TESTPFISEATTLE1@GMAIL.COM	02-27-2014 11:06AM PST	

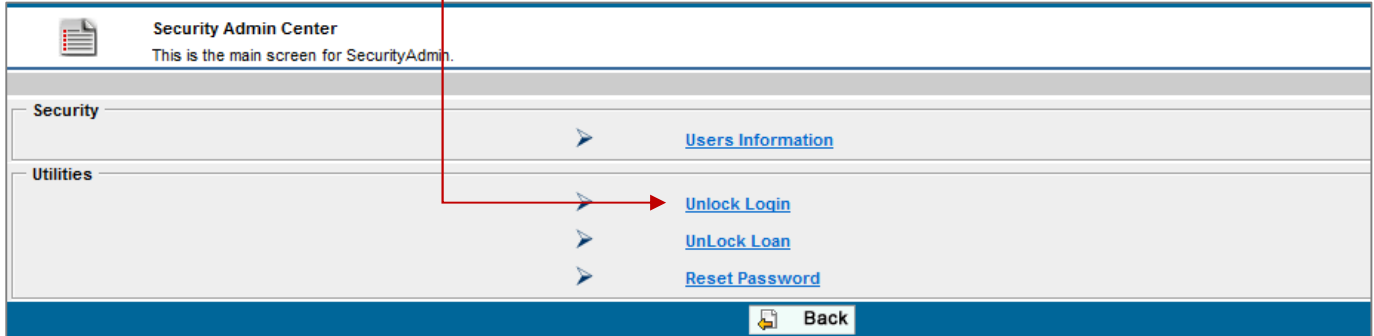
Rows 10 Go

Reset Password Add New Back

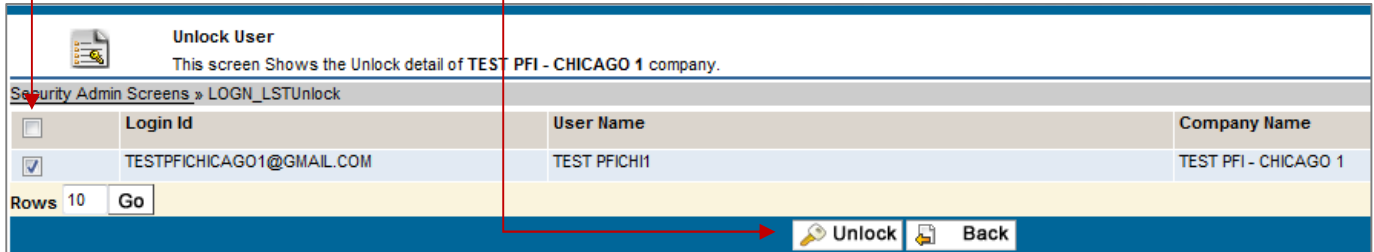
## Security Management - Utilities

### Unlock Login

- 1) Navigate to Security Management in the Admin Center (see instructions above)
- 2) Select Unlock Login

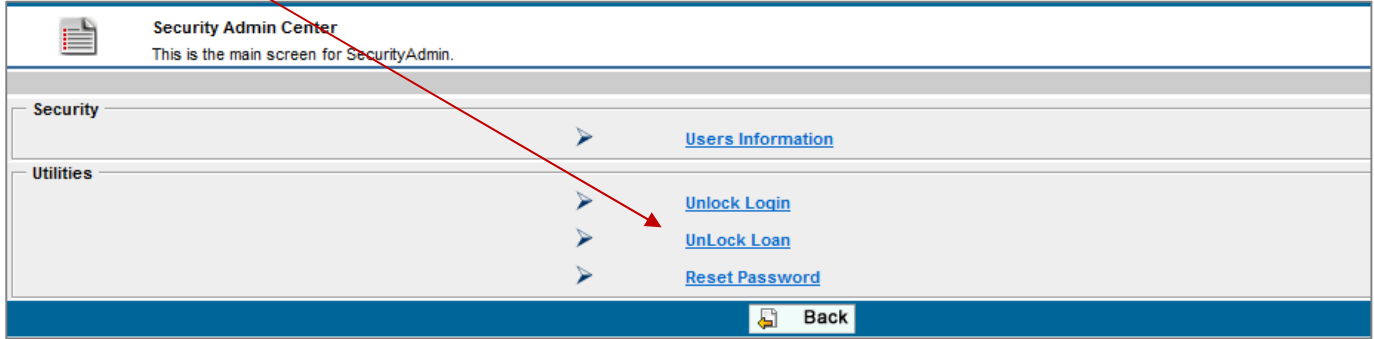


- 3) Click the box for the applicable user
- 4) Click the Unlock button. The user's account will be unlocked and accessible

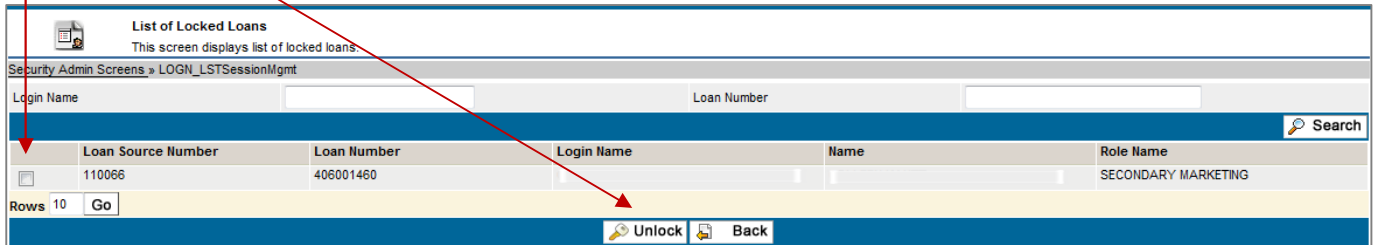


## Unlock Loan

- 1) Navigate to Security Management in the Admin Center (see instructions above)
- 2) Select Unlock Loan



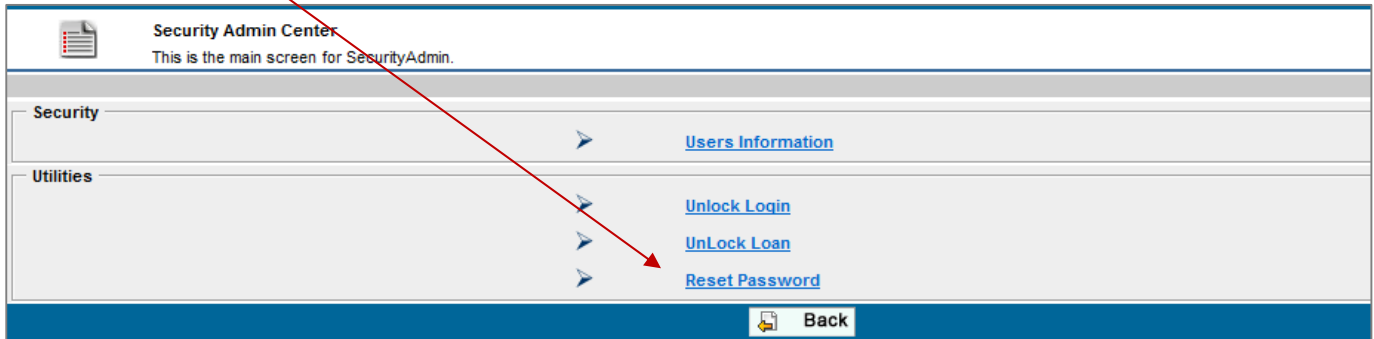
- 3) Click the box for the applicable loan
- 4) Click the Unlock button. The loan will be released and accessible





## Reset Password

- 1) Navigate to Security Management in the Admin Center (see instructions above)
- 2) Select Reset Password



- 3) Input the Login Name of the User
- 4) Click the Reset button. An email will automatically be sent to the User with a new temporary password which must be changed the next time they login to the Correspondent Portal.

