# MyGinnieMae Portal

Organizational Administrator Training:  Managing User Accounts

# TRAINING **AGENDA**

- **Objective**
- **User Management Tasks**
  - **Enable/Disable a User Account**
  - **Unlock/Lock a User Account**
  - **Update a User's Profile Attributes**
  - **Reset a User's Password**
  - **Review the Status of an Access Request**
  - **Verify an Assigned Functional Role**
- **Reporting**
  - **Capabilities**
  - **Procedures**

# TRAINING **OBJECTIVE**

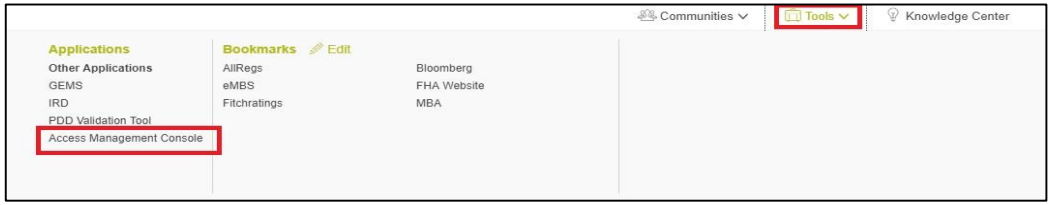
**The purpose of this training is to inform Organization Administrators of common user management tasks that can be handled by an Organization Administrator without assistance from the Ginnie Mae Help Desk.**

# *User Management Tasks*

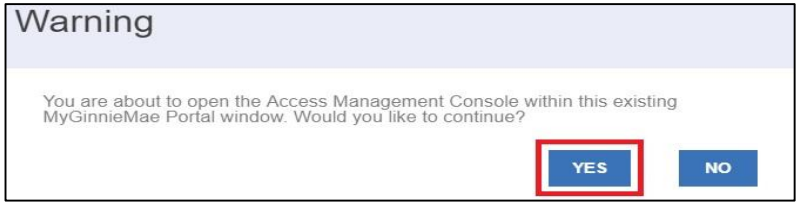
# Access the Access Management Console

Follow the steps below to access the User Management section of AMC.

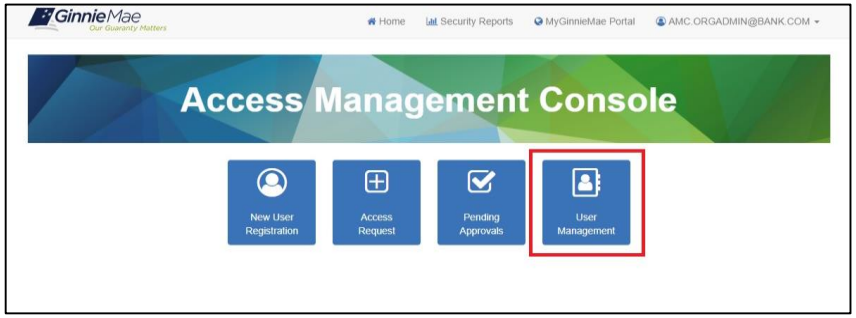
- From MyGinnieMae, select the “Tools” drop-down at the top and select “Access Management Console”.




- Select “Yes” when prompted to open AMC within the current Portal window.

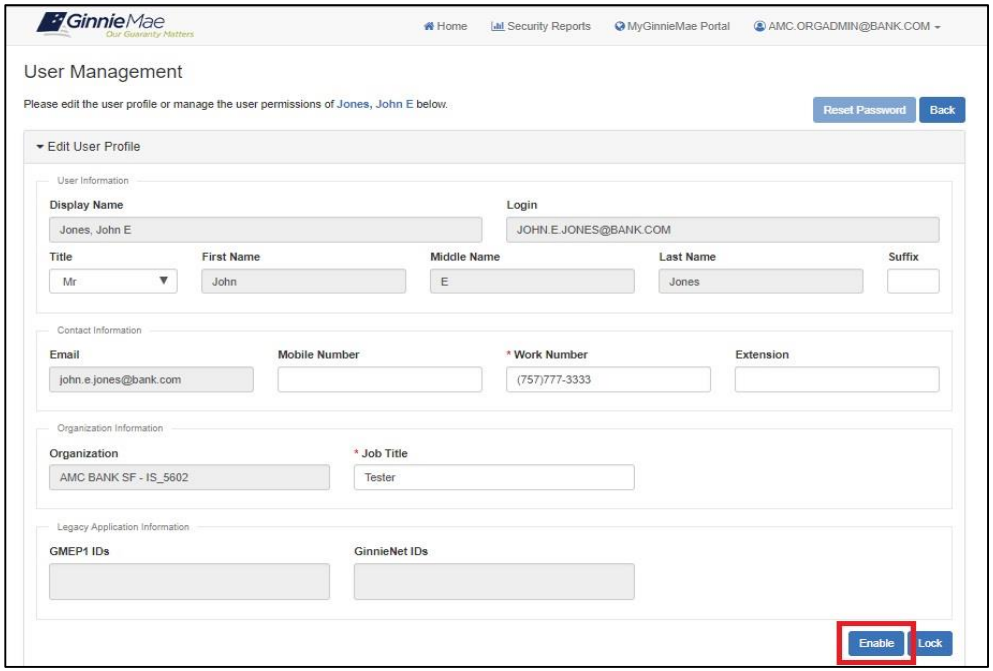



- Select the “User Management” tile in AMC.



# Enable/Disable a User Account

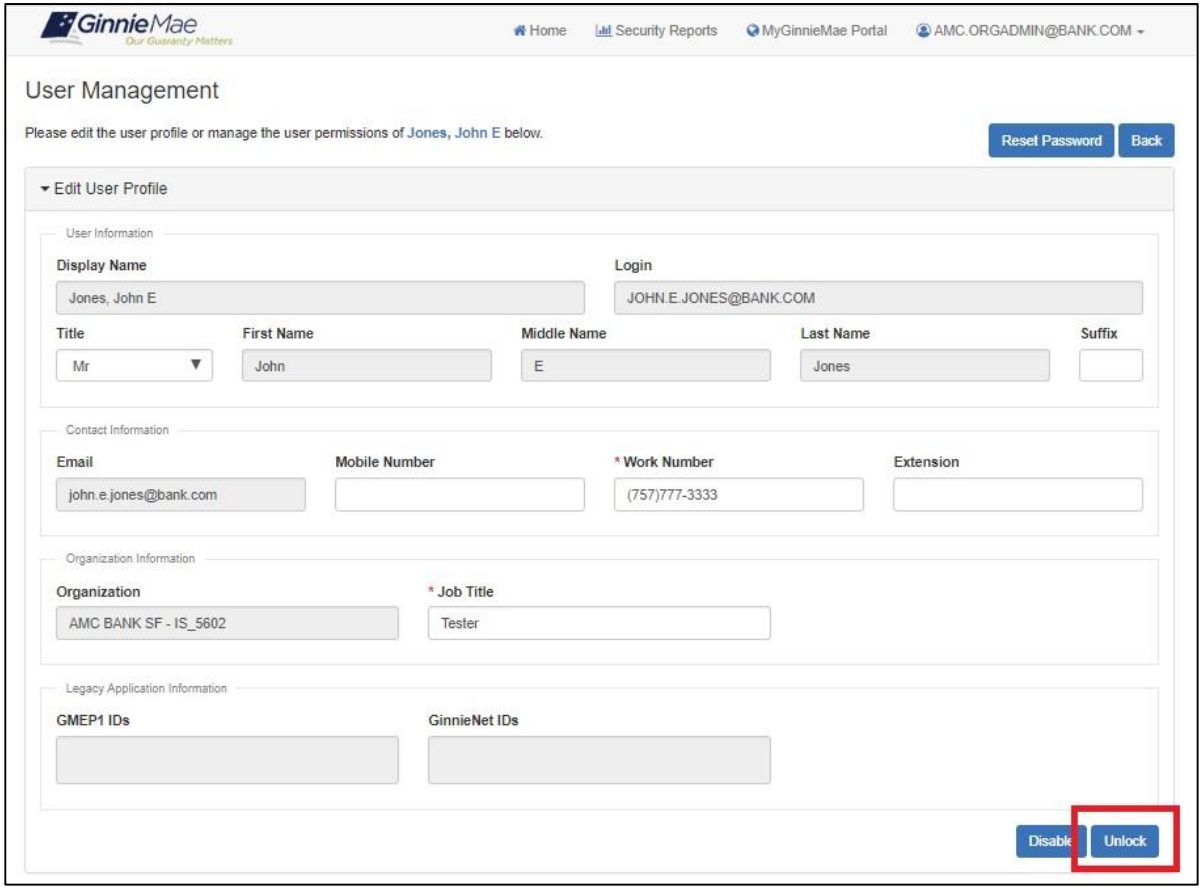
A user's account may be disabled due to 90 days of inactivity or disabled manually (due to change of job, etc.) and needs to be enabled. Advise the user to login to MyGinnieMae within 24 hours once their account has been enabled, or the account will automatically be disabled again.




- Always check to ensure the green success banner is displayed at the top of the screen once an action has been performed.

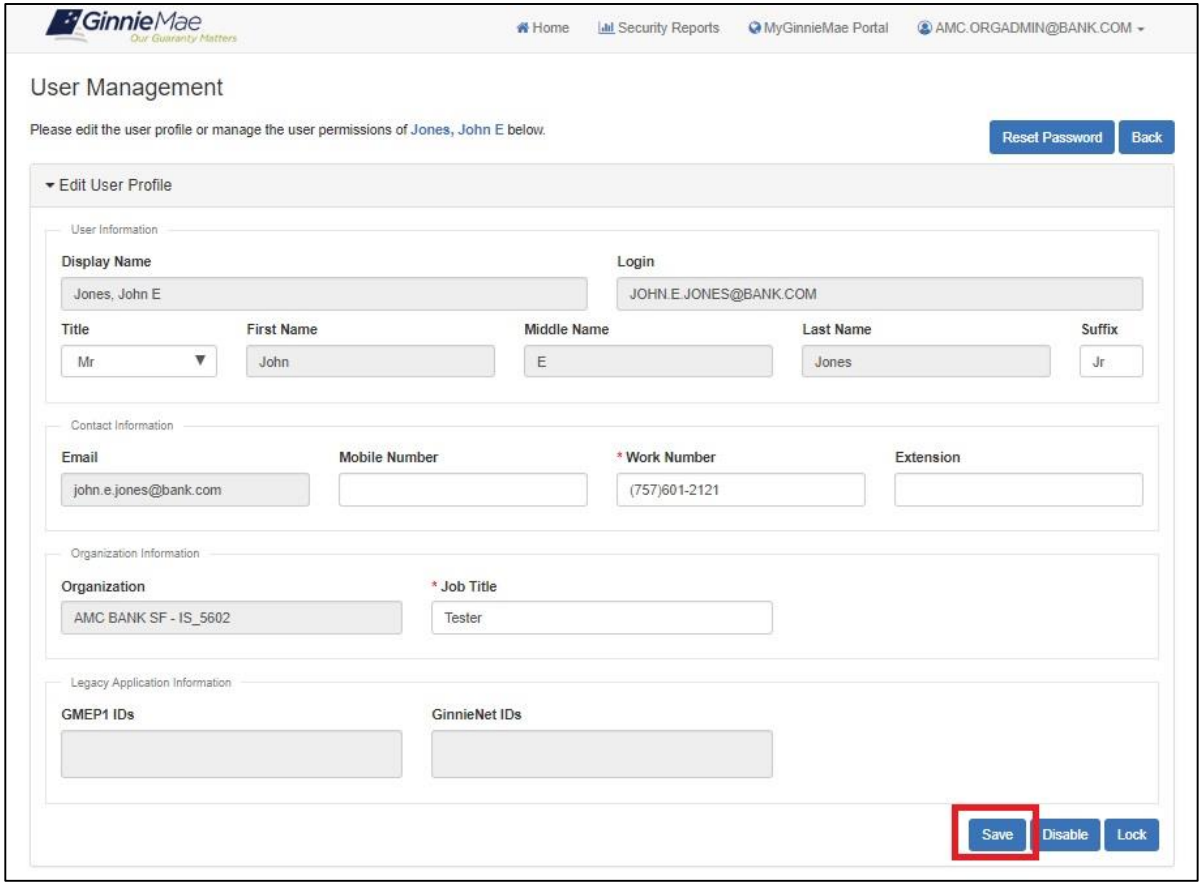
# Unlock/Lock a User Account

A user can become locked out of their account due to an Organization Administrator locking, three failed attempts at entering their username/password, or three failed attempts to enter a correct OTP.



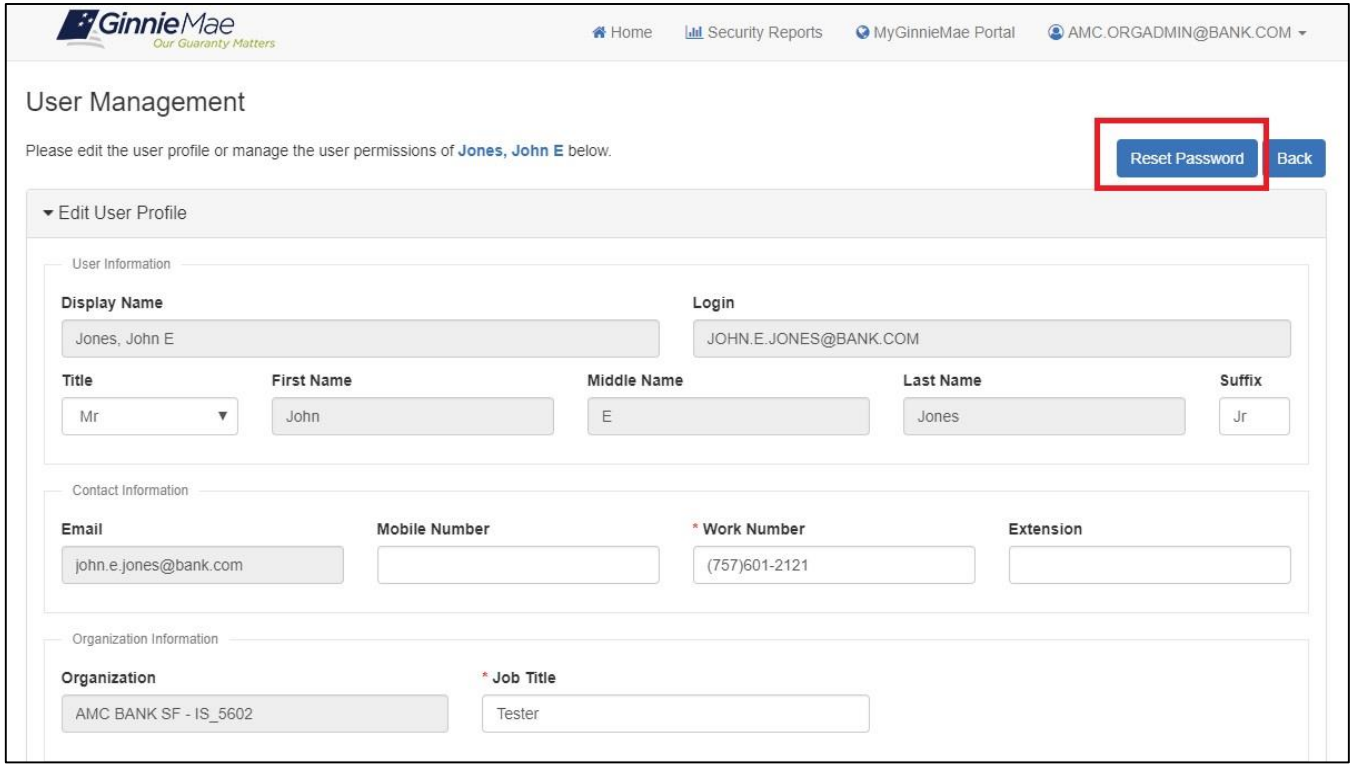
# Update a User's Profile Attributes

The following fields may be updated/changed for a user's account:  Title, Suffix, Mobile Number, Work Number, Extension, Job Title.



# Reset a User's Password

This service is used in an event that a user has forgotten their password and is unable to reset it using self-service capabilities, or they suspect their account has been compromised.

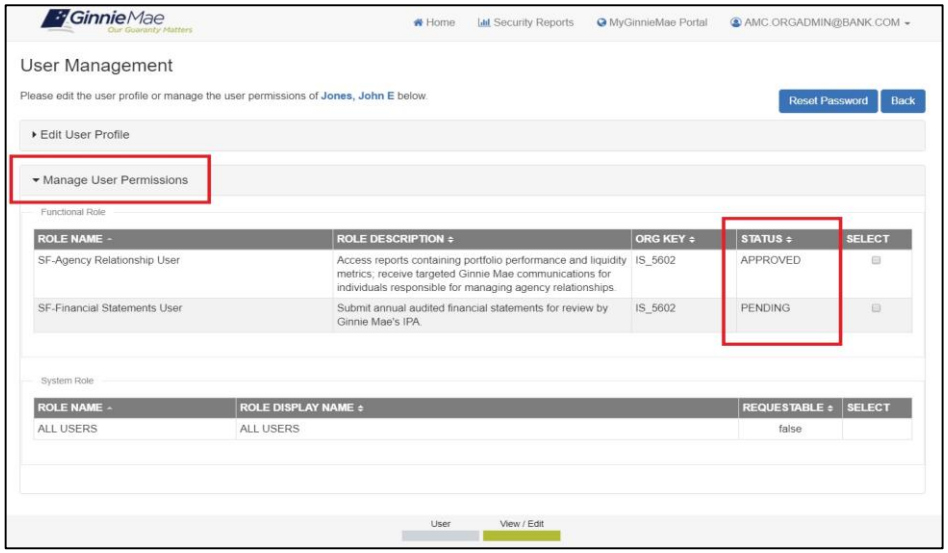



- The "Reset Password" button is inactive if the user's account is disabled. The account would need to be enabled prior to resetting the password.

# Review the Status of an Access Request

Once an access request is submitted, the system adds the Functional Role to the user's profile with a status of "Pending". The role is not provisioned to the user until necessary approvals are completed. The status of the request may be viewed at any time.

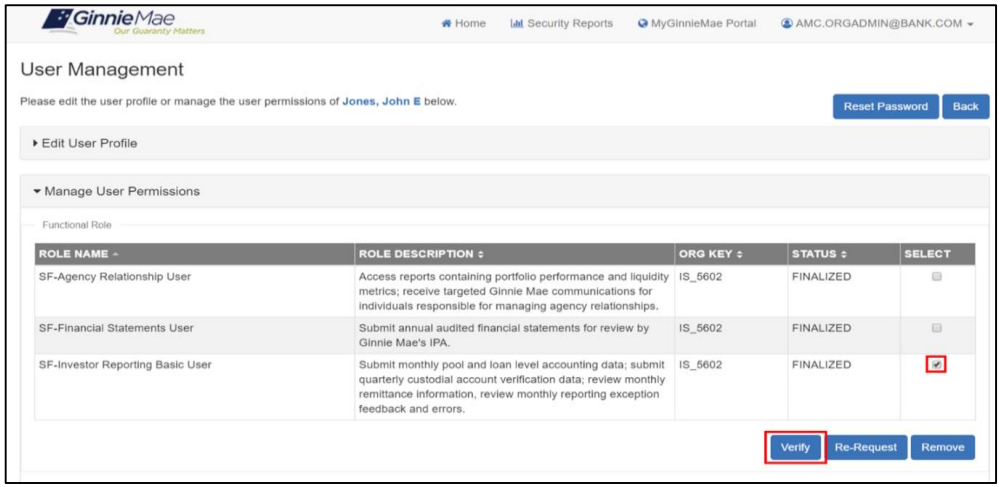
- Statuses of an Access Request:
  - PENDING – The Functional Role request is submitted and awaiting Organization Administrator approval.
  - APPROVED – The Functional Role is approved and awaiting Operations Administrator action.
  - FINALIZED – The Functional Role request has been finalized by the Operations Administrator and the underlying roles are in the process of being assigned to the user.



# Verify an Assigned Functional Role

Once an Operations Administrator has finalized a Functional Role request, there is the potential that not all of the underlying roles were successfully assigned to the user. If there is a system error, the Org Admin group will receive a notification. The status can also be manually verified.

- A system error could potentially prevent a role from being assigned to a user. If this occurs, the Organization Administrator group receives a notification. Functional Roles may have the following statuses:
  - CONFIRMED
  - PARTIAL – MISSING
  - MISSING
  - PARTIAL – NO ACCOUNT
  - FAILED




- If the status is *not* CONFIRMED, the Organization Administrator should request the Functional Role again.

# *System Reports*

# Security Reports

The Security Reports tab of the AMC is currently under construction. Ginnie Mae is working to create customized reports that will assist Organization Administrators in tracking users, functional roles, and portal activity for their organization's End Users. The first release of reports is expected in January 2019. Early Adopters will continue to be emailed the weekly User  Access Onboarding Report until the release.

Ginnie Mae is soliciting input from Early Adopter Organization Administrators on helpful reports and data fields for customized reports. Please join the Weekly Listening Sessions and/or contact Laticia.J.Jefferson@hud.gov

# USER ACCESS ONBOARDING REPORT

| USER REGISTRATION DETAILS | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **USERLOGIN** | **INVITATIONCREATEDATE** | **EXPIRED** | **REQUESTID** | **REQUESTSTATUS** | **REGISTRATIONSUBMITDATE** | **REGISTRATIONAPPROVEDDATE** | **CREATOR** | **APPROVERS** | **OUTCOME** |
| *This is the MyGinniemae account and typically is the corporate email address* | *The date MyGinnie Mae sent the Registration Invite to the user* | *This Field is check if the registration invite has expired* | *Registration Request Identifier* | *Status of clicking on the Registration invite to fill out the form* | *The date the registration form is completed* | *The date an Organization Administrator approved the registration request* | *The Org Admin that sent the registration invite* | *The Org Admin that approved the registration* | *Approval or Rejection of the registration* |
| John.doe@computers.com | 18-Oct-18 | | 109471 | Request Completed | 10/18/2018 13:39 | 18-OCT-018 01:49 PM | The Organization Administrator who created the Registration Invite | erica.newton@bnymellon.com | APPROVE |

| AMC FUNCTIONAL ROLE STATUS | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **FUNCTIONALROLENAME** | **ORGKEY** | **REQUESTDATE** | **REQUESTEDBY** | **APPROVALDATE** | **APPROVED BY** | **FINALIZATION DATE** | **FINALIZED BY** | **FUNTIONALROLESTATUS** |
| *The functional role name shown on the AMC console* | *Identifier that refers to the Organization that the access is associated with* | *The date that the access request was created by the Org Admin* | *Refers to the Org Admin that created the request* | *The date that the access was approved by the Org Admin* | *Refers to the Org Admin that approved the request* | *The date that the PPA Ops admin finalizes the request on behalf of GinnieMae* | *Refers to the PPA OPs Admin that finalized the request* | *The current status of the access request* |
| Depositor | DP_10013 | 18-Oct-18 | Jeremy.brown@bnymellon.com | 18-Oct-18 | Robert.strickland@bnymellon.com | 18-Oct-18 | Jeremy.brown@bnymellon.com | CONFIRMED |

| PRIVILEGED ROLE STATUS | | | | | LAST LOGIN STATUS |
|---|---|---|---|---|---|
| **REQUESTCREATEDATE** | **REQUEST ENDDATE** | **REQUESTOR** | **ROLEDISPLAYNAME** | **REQUESTSTATUS** | **LASTLOGINDATE** |
| *The date that the Org Admin request was created* | *The date that the Org Admin request was provisioned* | *The person that requested the Org Admin role* | *The name of the Org Admin role that was requested* | *Designates whether the request has been created or completed* | *The date when the user account last logged in to the My GinnieMae Portal* |
| 10/19/2018 14:58 | 10/19/2018 15:00 | Jeremy.brown@bnymellon.com | MyGinnieMae User Reg Admin | Request Completed | 10/19/2018 |

# Getting Help

- **RESOURCES**: Modernization Page on GinnieMae.gov https://www.ginniemae.gov/issuers/issuer_training/Pages/modernization.aspx
- **TECHNICAL ASSISTANCE**: Ginnie Mae Help Desk ginniemae1@bnymellon.com or 1-800-234-GNMA(4662), Option 6
- **GENERAL QUESTIONS AND FEEDBACK**: Laticia Jefferson, Laticia.J.Jefferson@hud.gov or 202-475-2738
- **LATEST NEWS**: Weekly Feedback Sessions (every Tuesday) Outreach Call Details posted on Modernization Page under MyGinnieMae section.