

# MyGinnieMae Portal

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Organizational Administrator Training: Managing User Accounts

# TRAINING **AGENDA**

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- **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

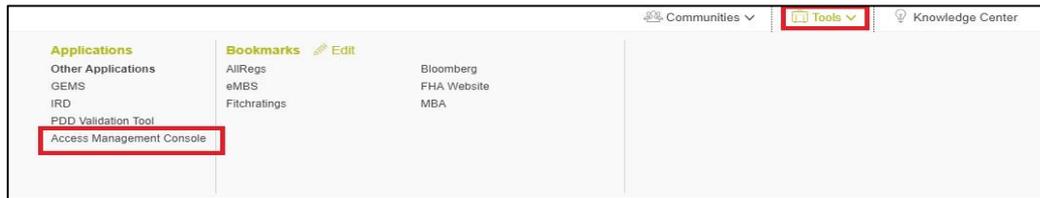
**The purpose of this training is to inform Organization Administrators of common user management tasks that can be handled by an Organization Administrator without assistance from the Ginnie Mae Help Desk.**

# *User Management Tasks*

# Access the Access Management Console

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

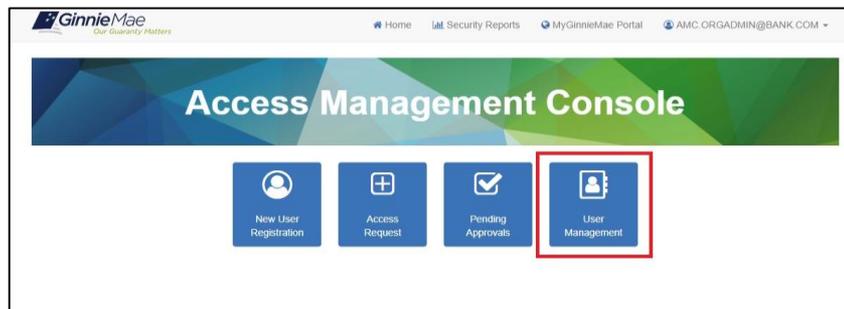
- > From MyGinnieMae, select the “Tools” drop-down at the top and select “Access Management Console”.



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

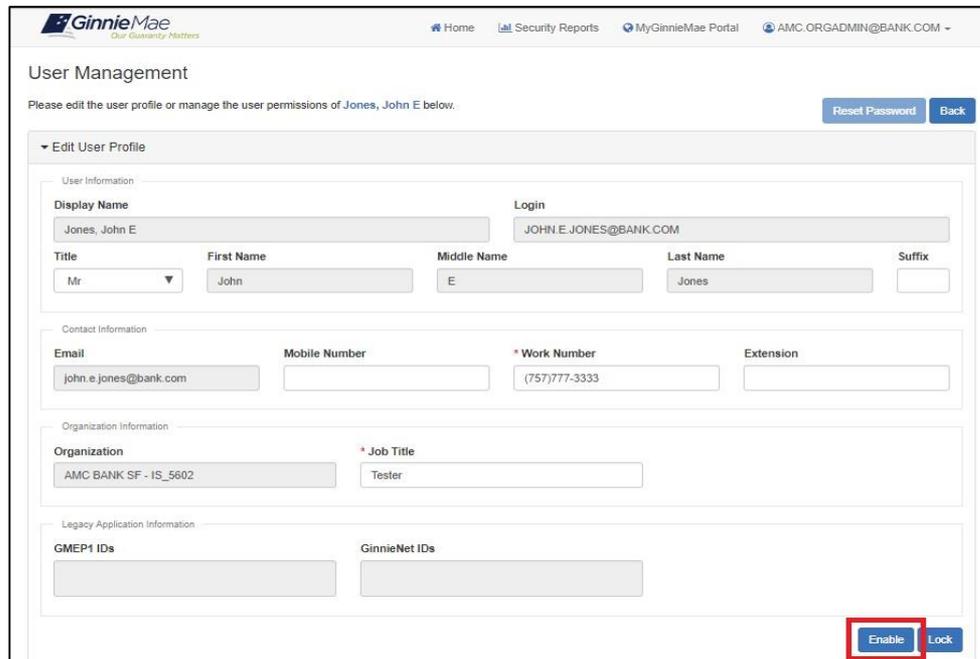


- > Select the “User Management” tile in AMC.



# 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.



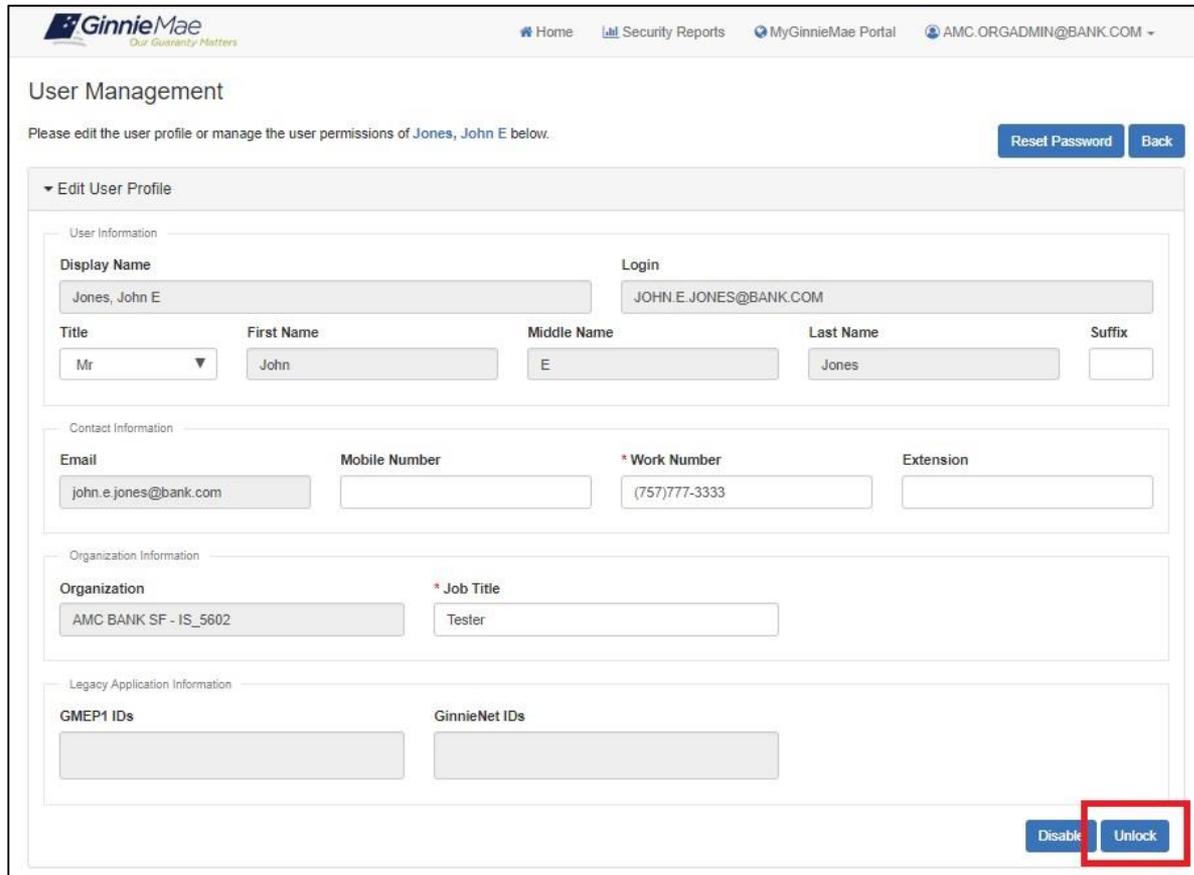
The screenshot shows the 'User Management' page in the GinnieMae system. The page title is 'User Management' and it includes a sub-header 'Please edit the user profile or manage the user permissions of Jones, John E below.' There are 'Reset Password' and 'Back' buttons. The main form is titled 'Edit User Profile' and is divided into several sections: 'User Information' (Display Name: Jones, John E; Login: JOHN.E.JONES@BANK.COM; Title: Mr; First Name: John; Middle Name: E; Last Name: Jones; Suffix: ), 'Contact Information' (Email: john.e.jones@bank.com; Mobile Number; Work Number: (757)777-3333; Extension), 'Organization Information' (Organization: AMC BANK SF - IS\_5602; Job Title: Tester), and 'Legacy Application Information' (GMEP1 IDs; GinnieNet IDs). At the bottom right of the form, there are 'Enable' and 'Lock' buttons, with the 'Enable' button highlighted by a red box.

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

User JOHN.E.JONES@BANK.COM successfully enabled.

# 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.



The screenshot displays the GinnieMae User Management interface. At the top, the GinnieMae logo and navigation links (Home, Security Reports, MyGinnieMae Portal, AMC.ORGADMIN@BANK.COM) are visible. The main heading is "User Management", with a sub-heading "Please edit the user profile or manage the user permissions of Jones, John E below." and buttons for "Reset Password" and "Back".

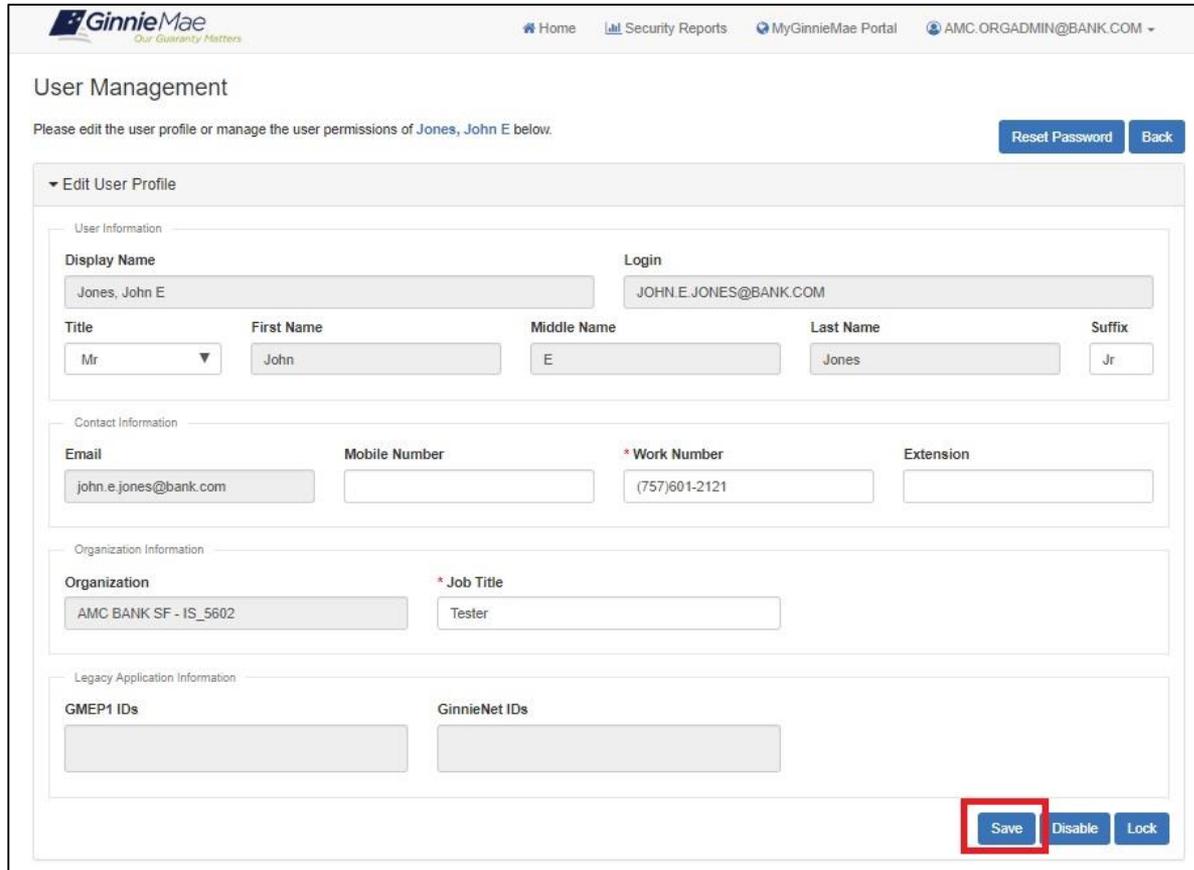
The "Edit User Profile" section is expanded, showing the following information:

- User Information:**
  - Display Name: Jones, John E
  - Login: JOHN.E.JONES@BANK.COM
  - Title: Mr
  - First Name: John
  - Middle Name: E
  - Last Name: Jones
  - Suffix: (empty)
- Contact Information:**
  - Email: john.e.jones@bank.com
  - Mobile Number: (empty)
  - \* Work Number: (757)777-3333
  - Extension: (empty)
- Organization Information:**
  - Organization: AMC BANK SF - IS\_5602
  - \* Job Title: Tester
- Legacy Application Information:**
  - GMEP1 IDs: (empty)
  - GinnieNet IDs: (empty)

At the bottom right of the form, there are two buttons: "Disable" and "Unlock". The "Unlock" button is highlighted with a red rectangular box.

# 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.



**GinnieMae**  
Our Guaranty Matters

Home Security Reports MyGinnieMae Portal AMC.ORGADMIN@BANK.COM

## User Management

Please edit the user profile or manage the user permissions of Jones, John E below. [Reset Password](#) [Back](#)

▼ Edit User Profile

User Information

Display Name: Jones, John E Login: JOHN.E.JONES@BANK.COM

Title: Mr First Name: John Middle Name: E Last Name: Jones Suffix: Jr

Contact Information

Email: john.e.jones@bank.com Mobile Number: \* Work Number: (757)601-2121 Extension:

Organization Information

Organization: AMC BANK SF - IS\_5602 \* Job Title: Tester

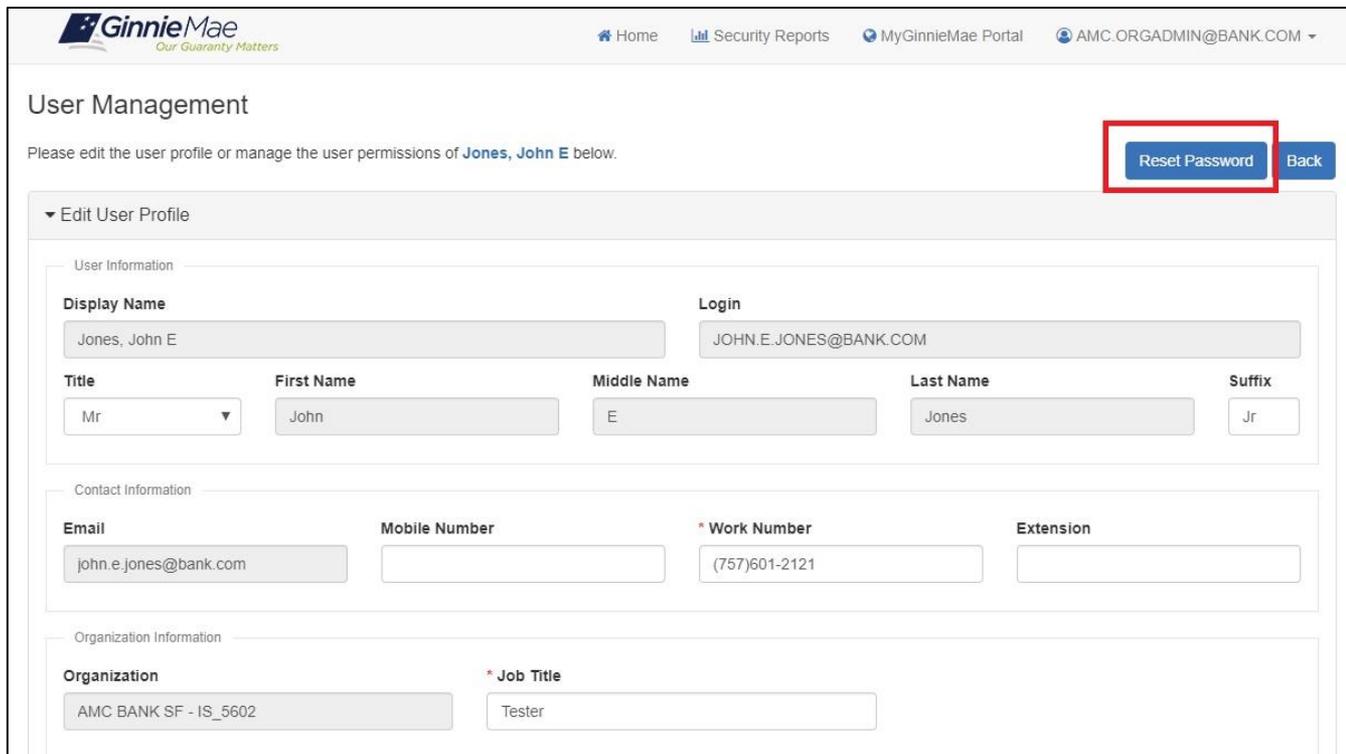
Legacy Application Information

GMEP1 IDs: GinnieNet IDs:

[Save](#) [Disable](#) [Lock](#)

# 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 screenshot displays the GinnieMae User Management interface. At the top, the GinnieMae logo and navigation links (Home, Security Reports, MyGinnieMae Portal, AMC.ORGADMIN@BANK.COM) are visible. The main heading is "User Management". Below this, a message states: "Please edit the user profile or manage the user permissions of Jones, John E below." To the right of this message, a blue button labeled "Reset Password" is highlighted with a red rectangular box, and a "Back" button is also present. The user profile is organized into sections: "Edit User Profile", "User Information", "Contact Information", and "Organization Information".

User Information				
Display Name	Jones, John E		Login	JOHN.E.JONES@BANK.COM
Title	First Name	Middle Name	Last Name	Suffix
Mr	John	E	Jones	Jr

Contact Information			
Email	Mobile Number	* Work Number	Extension
john.e.jones@bank.com		(757)601-2121	

Organization Information	
Organization	* Job Title
AMC BANK SF - IS_5602	Tester

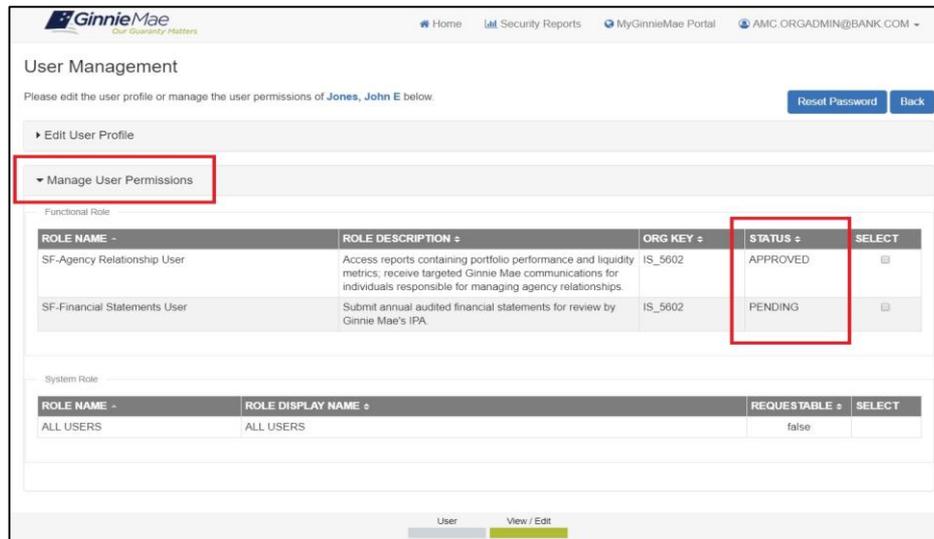
- The "Reset Password" button is inactive if the user's account is disabled. The account would need to be enabled prior to resetting the password.

# 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.

## ➤ Statures 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.



The screenshot displays the 'User Management' interface for user 'Jones, John E'. The 'Manage User Permissions' section is expanded, showing a table of Functional Roles. The 'STATUS' column for the 'SF-Agency Relationship User' role is highlighted with a red box, showing 'APPROVED'. The 'SF-Financial Statements User' role is shown with a 'PENDING' status. Below this, the 'System Role' section shows 'ALL USERS' with a 'REQUESTABLE' status of 'false'.

ROLE NAME	ROLE DESCRIPTION	ORG KEY	STATUS	SELECT
SF-Agency Relationship User	Access reports containing portfolio performance and liquidity metrics; receive targeted Ginnie Mae communications for individuals responsible for managing agency relationships.	IS_5602	APPROVED	<input type="checkbox"/>
SF-Financial Statements User	Submit annual audited financial statements for review by Ginnie Mae's IPA.	IS_5602	PENDING	<input type="checkbox"/>

ROLE NAME	ROLE DISPLAY NAME	REQUESTABLE	SELECT
ALL USERS	ALL USERS	false	<input type="checkbox"/>

# 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

The screenshot shows the 'User Management' interface for 'Jones, John E'. It features a table of functional roles with the following data:

ROLE NAME	ROLE DESCRIPTION	ORG KEY	STATUS	SELECT
SF-Agency Relationship User	Access reports containing portfolio performance and liquidity metrics; receive targeted Ginnie Mae communications for individuals responsible for managing agency relationships.	IS_5602	FINALIZED	<input type="checkbox"/>
SF-Financial Statements User	Submit annual audited financial statements for review by Ginnie Mae's IPA.	IS_5602	FINALIZED	<input type="checkbox"/>
SF-Investor Reporting Basic User	Submit monthly pool and loan level accounting data; submit quarterly custodial account verification data; review monthly remittance information; review monthly reporting exception feedback and errors.	IS_5602	FINALIZED	<input checked="" type="checkbox"/>

At the bottom of the table, there are three buttons: 'Verify' (highlighted with a red box), 'Re-Request', and 'Remove'.

➤ 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](mailto:Laticia.J.Jefferson@hud.gov)

# USER ACCESS ONBOARDING REPORT

USER REGISTRATION DETAILS									
USERLOGIN	INVITATIONCREATEDATE	EXPIRED	REQUESTID	REQUESTSTATUS	REGISTRATIONSUBMITDATE	REGISTRATIONAPPROVEDDATE	CREATOR	APPROVERS	OUTCOME
<i>This is the MyGinniemae account and typically is the corporate email address</i>	<i>The date MyGinnie Mae sent the Registration Invite to the user</i>	<i>This Field is check if the registration invite has expired</i>	<i>Registration Request Identifier</i>	<i>Status of clicking on the Registration invite to fill out the form</i>	<i>The date the registration form is completed</i>	<i>The date an Organization Administrator approved the registration request</i>	<i>The Org Admin that sent the registration invite</i>	<i>The Org Admin that approved the registration</i>	<i>Approval or Rejection of the registration</i>
<a href="mailto:John.doe@computers.com">John.doe@computers.com</a>	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	FUNCTIONALROLES TATUS	
<i>The functional role name shown on the AMC console</i>	<i>Identifier that refers to the Organization that the access is associated with</i>	<i>The date that the access request was created by the Org Admin</i>	<i>Refers to the Org Admin that created the request</i>	<i>The date that the access was approved by the Org Admin</i>	<i>Refers to the Org Admin that approved the request</i>	<i>The date that the PPA Ops admin finalizes the request on behalf of GinnieMae</i>	<i>Refers to the PPA Ops Admin that finalized the request</i>	<i>The current status of the access request</i>	
Depositor	DP_10013	18-Oct-18	<a href="mailto:Jeremy.brown@bnymellon.com">Jeremy.brown@bnymellon.com</a>	18-Oct-18	Robert.strickland@bnymellon.com	18-Oct-18	<a href="mailto:Jeremy.brown@bnymellon.com">Jeremy.brown@bnymellon.com</a>	CONFIRMED	
PRIVILEGED ROLE STATUS									LAST LOGIN STATUS
REQUESTCREATEDATE	REQUEST ENDDATE	REQUESTOR		ROLEDISPLAYNAME			REQUESTSTATUS	LASTLOGINDATE	
<i>The date that the Org Admin request was created</i>	<i>The date that the Org Admin request was provisioned</i>	<i>The person that requested the Org Admin role</i>		<i>The name of the Org Admin role that was requested</i>			<i>Designates whether the request has been created or completed</i>	<i>The date when the user account last logged in to the My GinnieMae Portal</i>	
10/19/2018 14:58	10/19/2018 15:00	<a href="mailto:Jeremy.brown@bnymellon.com">Jeremy.brown@bnymellon.com</a>		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](https://www.ginniemae.gov/issuers/issuer_training/Pages/modernization.aspx)
- **TECHNICAL ASSISTANCE:** Ginnie Mae Help Desk  
[ginniemae1@bnymellon.com](mailto:ginniemae1@bnymellon.com) or 1-800-234-GNMA(4662), Option 6
- **GENERAL QUESTIONS AND FEEDBACK:** Laticia Jefferson,  
[Laticia.J.Jefferson@hud.gov](mailto: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.