

MyGinnieMae Portal Organization Administrator Training Managing End Users

V 2.4

TRAINING AGENDA

- **Objectives**
- **Overview**
 - MyGinnieMae Access Management Console (AMC) User Manual
 - Onboarding Workflow
 - Organization Administrator Controls
- **Video Demonstration - User Management**
 - Review Status of Access Request
 - Add/Remove Functional Role
 - Update a User's Profile Attributes
 - Unlock/Lock a User Account
 - Enable/Disable a User Account
 - Reset a User's Password
- **Video Demonstration - Reports**
 - AMC Functional Role Request History Report
 - Create a list of active user accounts
- **Resources**
- **Q&A**

TRAINING OBJECTIVES

The objective of this training is to provide Organization Administrators with the following:

- ✓ Guidance on how to review the status of an account access request
- ✓ Information about End User account management functions
- ✓ Information on troubleshooting and getting help
- ✓ Overview of reports available via the Access Management Console (AMC)

OVERVIEW AMC USER MANUAL

The information covered in this training presentation is from the [Access Management Console User Manual](#), which located with several other resources, including Quick Reference Cards, on the [Modernization Page](#) of GinnieMae.gov. *Section 4: Using the Application* provides step-by-step instructions on functions like, managing and maintaining End User accounts.

MYGINNIEMAE ACCESS MANAGEMENT CONSOLE (AMC) USER MANUAL

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4 USING THE APPLICATION

4.1 Outlook Rules for Email Notifications

4.1.1 Outlook Rule for Organization Administrator Group Notifications
 Each Organization Administrator will receive several notifications relating to registration and access workflow items for each End User in their organization. If the Org Admin would like to automatically move those notifications from the inbox to a designated folder, the following criteria will assist. For detailed instructions on creating a rule in Microsoft Outlook visit Microsoft Office Support at: <https://support.microsoft.com/en-us and search 'Manage email messages by using rules'>.

Criteria:

```

From: amcadmin@ginniemae.gov
Subject contains:
"Action Required: User Registration Request for Approval"
"Action Required: Access Request for Approval"
"New Functional Role Assignment"
"Action Required: ISA Token Role Assignment"
Target folder: Any user defined outlook folder. In the screenshot provided below, OrgAdminNotification is the user defined folder.
    
```

4.2 Onboarding End Users - Registration & Access Workflow



Figure 10 - MyGinnieMae Onboarding Workflow

4.3 Managing and Maintaining User Accounts

4.3.1 Disable a User Account
 If the account of a user must be removed for any reason (for example, if the user is leaving the Home Organization), the Organization Administrator is responsible for disabling the End User account via the Access Management Console. Disabling a user removes all assigned Functional Roles. Therefore, if user access needs to be temporarily blocked for a short period of time, consider locking the user account as described in [Section: Lock a User's Account](#).

- To disable an account, follow the steps below:
1. Follow the instructions for [Logging into MyGinnieMae](#)
 2. [Navigate to the Access Management Console](#)
 3. Select **User Management** tile.



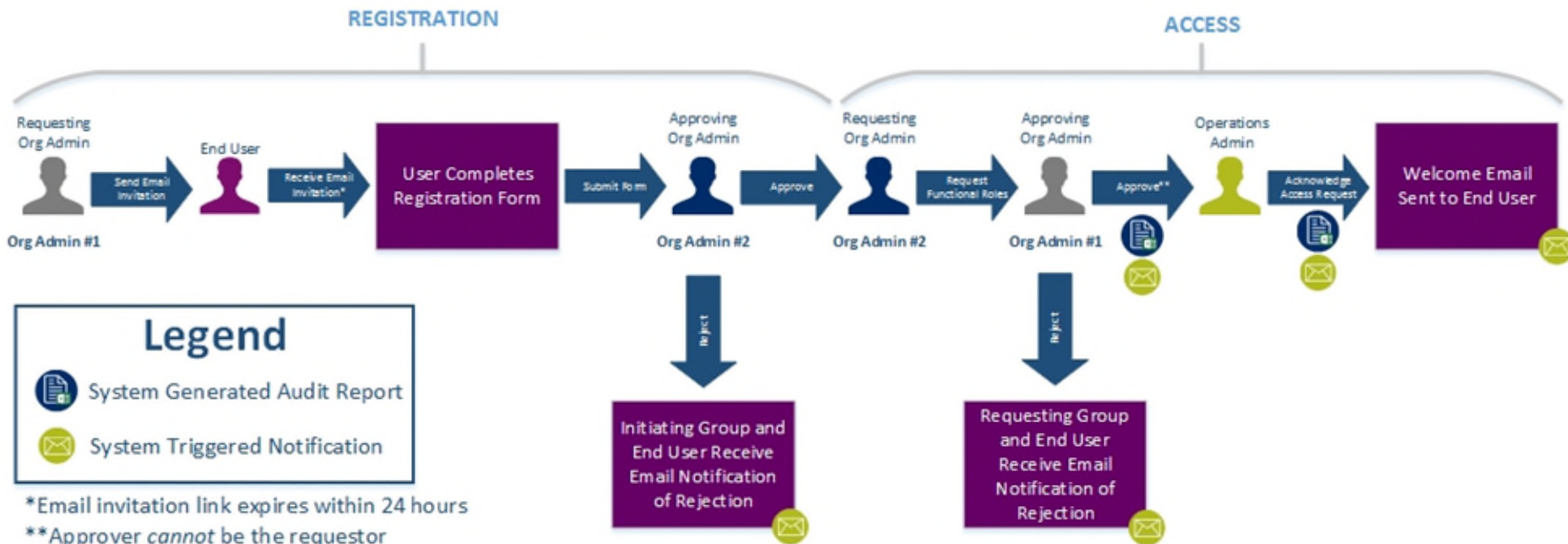
4.4 Troubleshooting and System Errors

This section is designed to help identify common errors an Organization Administrator may encounter and provide tips for troubleshooting issues. If the suggested tips are unsuccessful or errors persist, refer the [Ginnie Mae Customer Support](#) [ticketing](#).

OVERVIEW ONBOARDING WORKFLOW

Onboarding an End User is a multi-step process that may take several days to complete and requires participation from the End User, Organization Administrators, and an Operations Administrator.

- **Registration Workflow** – creates a portal account and give users access to the portal.
- **Access Workflow** – assigns functional role(s) and give users access to business applications.



NOTE: Org Admins are expected to know the access and end user needs.

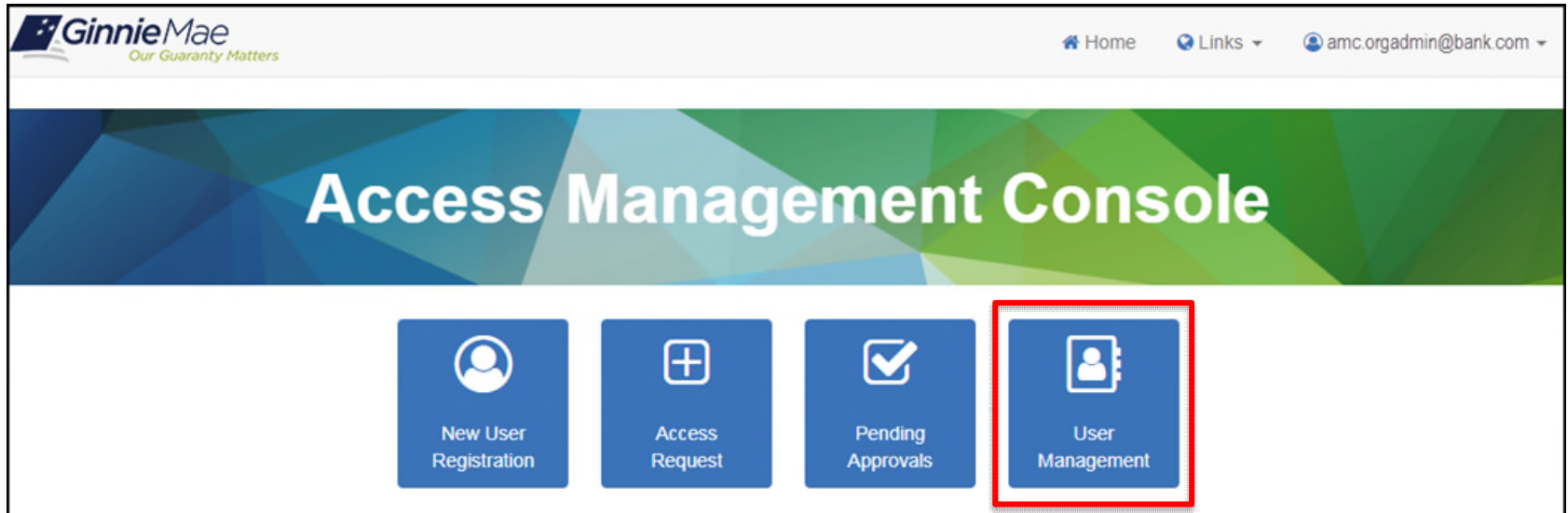
OVERVIEW ORG ADMIN CONTROLS

MyGinnieMae introduces self-service functions for End Users and provides account management controls for Organization Administrators at each organization. This chart highlights some of those functions and responsibilities.

Function	Self Service	Organization Administrator	Operation Administrator
Initiate registration invitations to End Users		★	
Approve or reject registration requests from End Users		★	
Initiate access request/functional role for an End User account		★	
Approve or reject functional role for an End User account		★	
Remove a functional role from an End User account		★	
Enable/Disable and Lock/Unlock End User accounts		★	
Forgot Password	★		
Reset Password	★	★	
Deregister Oracle Mobile Authenticator access	★	★	
Update Account Attributes	★	★	
Final acknowledgement of access requests			★

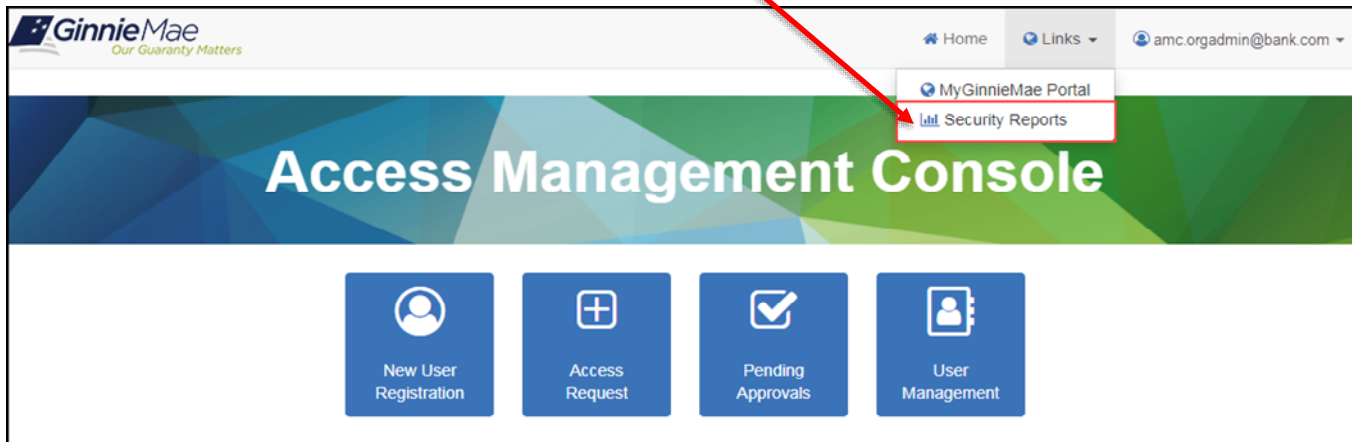
USER MANAGEMENT AMC

The User Management Tile in the Access Management Console (AMC) is where Organization Administrators go to manage existing End User accounts for their organization.



REPORTS AMC

The AMC provides Organization Administrators an audit trail and additional insight into the user accounts for their organization in Ginnie Mae business systems. These reports capture logs and event data for various identity and access management events.



The following reports are available to Org Admins via the AMC:

Service	Reports	Type
User Registration	Home Organization User List Org Admin View	Custom
	User Profile History	Standard
	User Registration Request History	Custom
Access Requests	AMC Functional Role Request History	Custom
Multifactor Authentication (MFA)	Accounts Locked Out Report	Standard
	Authentication Statistics Report	Standard
Self-Service Change Password	Password Expiration Summary	Standard

VIDEO DEMONSTRATION

GETTING HELP RESOURCES

- **Modernization Page on GinnieMae.gov**
https://www.ginniemae.gov/issuers/issuer_training/Pages/modernization.aspx
 - ✓ User Manuals (including: Access Management Console (AMC) User Manual)
 - ✓ Quick Reference Cards
 - ✓ Training Overviews
 - ✓ Release and Training Schedule
 - ✓ Training materials and recordings
- Join **Thursday [Weekly Listening Sessions](#)** to ask questions and learn best practices
- For **technical questions** about accessing the portal and using its applications contact **Ginnie Mae Customer Support** at 1-833-GNMA HELP / 1-833-466-2435 or ginniemae1@bnymellon.com
- For questions about, training, user materials and general MyGinnieMae inquires contact the Ginnie Mae **Customer Experience Group** at cxg@hud.gov

APPENDIX

USER MANAGEMENT STATUS OF 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. To review the status of a Functional Role request for a user, follow the steps below. See the AMC User Manual for more information.

- After selecting the desired user, find the arrow next to "Manage User Permissions" to open the accordion.
- The system displays the assigned Functional Role(s) with the status of the 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.
- **CONFIRMED** – the underlying roles have been fully assigned to the user.

The screenshot shows the GinnieMae User Management interface for user Jones, John E. The 'Manage User Permissions' section is expanded, displaying a table of Functional Roles. A red box highlights the 'Manage User Permissions' link, and another red box highlights the 'STATUS' column in the table. A red arrow points to the 'SF-Agency Relationship User' role name.

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"/>

- Clicking on the Role Name reveals the Role Status overlay. The overlay contains information about the user's Functional Roles, including Request Date, Requester, Approval Date, Approver, Finalized Date, Finalizer and Status.

USER MANAGEMENT ADD FUNCTIONAL ROLE

If an End User requires a new functional role, this may be done from the User Management Tile in AMC within the Edit User Profile Section. This request would subsequently have to be approved by another Org Admin and finalized by the Operations Admin.

User Management

Please edit the user profile or manage the user permissions of **MF issuer end user three, Maribel** below. Reset Password Back

▼ Edit User Profile

User Information

Display Name **Login**

Title **First Name** **Middle Name** **Last Name** **Suffix**

* Does this user have an RSA token? Yes: No: * RSA Token Serial Number

Contact Information

Email **Mobile Number** * **Work Number** **Extension**

Organization Information

Organization * **Job Title**

Legacy Application Information

GMEP1 IDs **GinnieNet IDs**

De-register OMA Request Access Disable Lock

USER MANAGEMENT REMOVE FUNCTIONAL ROLE

If an End User no longer requires access to a specific Functional Role, possibly because their business responsibilities have changed, Organization Administrators are responsible for removing that role from the user's account. This may be done within the Manage User Permissions section.

The screenshot shows the GinnieMae user management interface. At the top, there is a navigation bar with the GinnieMae logo, the tagline "Our Guaranty Matters", and links for Home, Links, and a user profile (amc.orgadmin@bank.com). Below the navigation bar, the page title is "User Management". A message states: "Please edit the user profile or manage the user permissions of Jones, John E below." To the right of this message are buttons for "Reset Password" and "Back".

There are two main sections for user management:

- Edit User Profile**: A button to edit the user's profile.
- Manage User Permissions**: A section with a dropdown arrow, highlighted by a red arrow. It contains two tables:

Functional Role Table:

ROLE NAME	ROLE DESCRIPTION	ORG KEY	STATUS	SELECT
SF-Bulk Transfers Authorized Signer	Initiate, manage and accept bulk transfer transactions; initiate and coordinate transfers of collateral files with transferee and transferor Issuers or Document Custodians.	IS_5602	CONFIRMED	<input checked="" type="checkbox"/>
SF-Loan Delivery and Pooling Basic User	Upload/enter pool and loan information for delivery; verify availability of commitment authority; clear document deficiencies and pooling exceptions; access to prepare but not execute PIIT/TAI transactions.	IS_5602	CONFIRMED	<input type="checkbox"/>

Below the Functional Role table are buttons for "Verify", "Re-Request", and "Remove". The "Remove" button is highlighted with a red box.

System Role Table:

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

USER MANAGEMENT UPDATE PROFILE ATTRIBUTES

The following fields may be updated/changed for a user's account: *Title, Suffix, Mobile Number, Work Number, Extension, Job Title and RSA Token*. If not completed during New User Registration, Org Admins are responsible for adding the RSA Token to the token holder's profile attributes and following up with an email to the Operations Administrator.

User Management

Please edit the user profile or manage the user permissions of MF issuer end user three, Maribel below. Reset Password Back

▼ Edit User Profile

User Information

Display Name: MF issuer end user three, Maribel Login: MFISSUER3@GINNIENET.COM

Title: Ms First Name: Maribel Middle Name: Last Name: MF issuer end user three Suffix:

* Does this user have an RSA token? * RSA Token Serial Number
Yes: No: 123549875

Contact Information

Email: mfiissuer3@ginnienet.com Mobile Number: * Work Number: (212)815-2336 Extension:

Organization Information

Organization: MULTIFAMILY SYSTEM DEMO - IS_6012 * Job Title: MF Issuer

Legacy Application Information

GMEP1 IDs: I_mmfiissuerenduserthr6012 GinnieNet IDs: 1507929

De-register OMA Request Access Disable Lock

USER MANAGEMENT UNLOCK/LOCK ACCOUNT

A user can become automatically locked out of their account due to 3 failed password attempts or if an Organization Administrator has manually locked the account via the AMC. Locking a user's account is a temporary action and can be reverted.

User Management

Please edit the user profile or manage the user permissions of **MF issuer end user three, Maribel** below. Reset Password Back

▼ Edit User Profile

User Information

Display Name: MF issuer end user three, Maribel Login: MFISSUER3@GINNIENET.COM

Title: Ms First Name: Maribel Middle Name: Last Name: MF issuer end user three Suffix:

* Does this user have an RSA token? Yes: No: * RSA Token Serial Number: 123549875

Contact Information

Email: mfishuer3@ginnienet.com Mobile Number: * Work Number: (212)815-2336 Extension:

Organization Information

Organization: MULTIFAMILY SYSTEM DEMO - IS_6012 * Job Title: MF Issuer

Legacy Application Information

GMEP1 IDs: I_mmfishuerenduserthr6012 GinnieNet IDs: 1507929

De-register OMA Request Access Disable Lock

USER MANAGEMENT **ENABLE/DISABLE ACCOUNT**

A user's account may become automatically disabled due to 90 days of inactivity. Enable the account and advise the user to login to MyGinnieMae within 24 hours once their account has been enabled, or the account will automatically be disabled again.

Org Admins should manually disable a user's account if the user has left the organization or for other organization specific reasons (such as a change in role).

The screenshot displays a user management form with three main sections:

- Contact Information:** Includes fields for Email (mfissuer3@ginnienet.com), Mobile Number, Work Number ((212)815-2336), and Extension.
- Organization Information:** Includes Organization (MULTIFAMILY SYSTEM DEMO - IS_6012) and Job Title (MF Issuer).
- Legacy Application Information:** Includes GMEP1 IDs (I_mmfissuerenduserthr6012) and GinnieNet IDs (1507929).

At the bottom right, there are four buttons: "De-register OMA", "Request Access", "Disable" (highlighted with a red box), and "Lock".

The Org Admin should wait for the successful action ribbon to display to ensure that actions have been completed.

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

USER MANAGEMENT RESET A 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.

User Management

Please edit the user profile or manage the user permissions of MF issuer end user three, Maribel below.

[Reset Password](#) [Back](#)

▼ Edit User Profile

User Information

Display Name: MF issuer end user three, Maribel

Login: MFISSUER3@GINNIENET.COM

Title: Ms

First Name: Maribel

Middle Name:

Last Name: MF issuer end user three

Suffix:

* Does this user have an RSA token? Yes: No:

* RSA Token Serial Number: 123549875

Contact Information

Email: mfissuer3@ginnienet.com

Mobile Number:

* Work Number: (212)815-2336

Extension:

Organization Information

Organization: MULTIFAMILY SYSTEM DEMO - IS_6012

* Job Title: MF Issuer

Legacy Application Information

GMEP1 IDs: I_mmfiissuerenduserthr6012

GinnieNet IDs: I507929

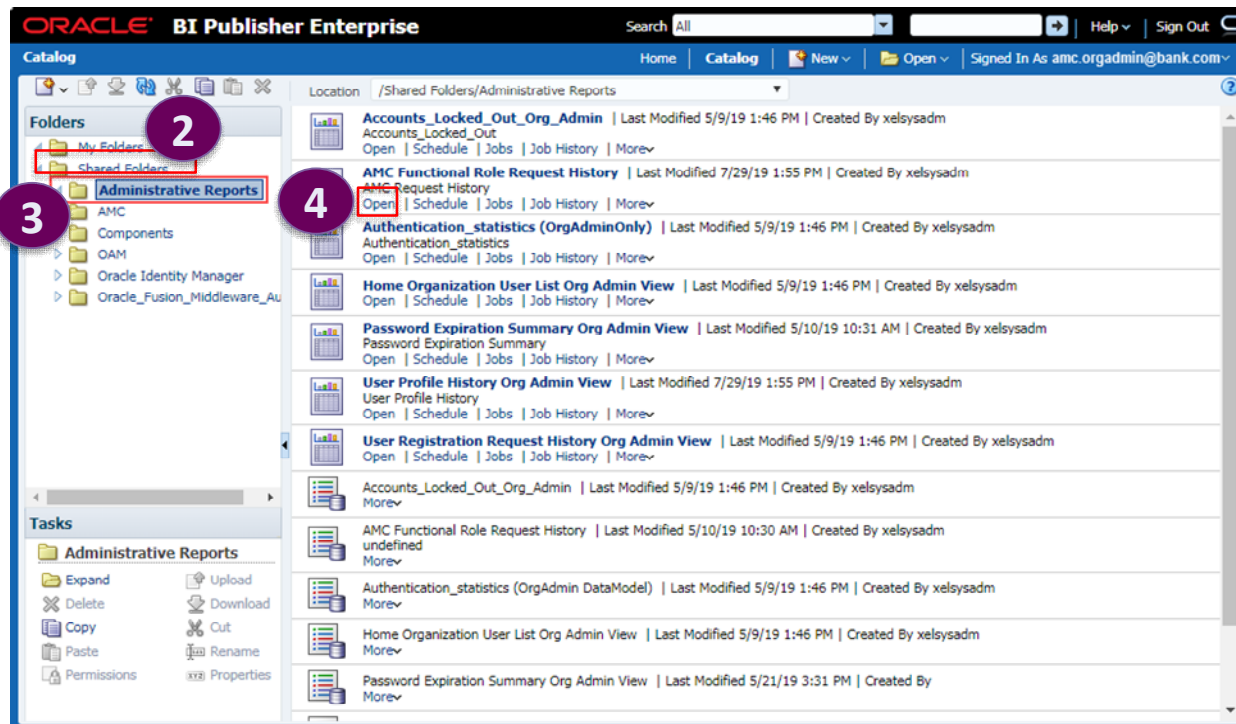
[De-register OMA](#) [Request Access](#) [Disable](#) [Lock](#)

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.

REPORTS ACCESSING REPORTS

From the AMC Security Reports tab the system will open ORACLE BI Publisher Enterprise in a new window.

1. Select **Catalog Folders**
2. Select **Shared Folders**
3. Select **Administrative Reports**
4. Select **Open** under the desired report



REPORTS AMC FUNCTIONAL ROLE REQUEST HISTORY

The AMC Functional Role Request History report contains the request history for functional roles for each user. The report displays the *Request ID*, *User Login*, *Function Role Name*, *Functional Role Type*, *Organization Key*, *Functional Role Status*, *Requester*, *Request Date*, *Approver*, *Approval Date*, *Finalizer*, *Finalized Date*, *Revoker* and *Revoked Date* fields.

Req Id	User Login	Role Name	Role Type	Org Key	Status	Requester	Request Date	Approver	Approval Date	Finalizer	Finalized Date	Revoker	Revoked Date
527	TESTGMEP@DELOITTE.COM	SF-Agency Relationship User	Single Family Issuer	IS_1857	CONFIRMED	AMC.TESTER@YAHOO.COM	2018-04-03 20:07	STEVEYSON.JIMMY@GMAIL.COM	2018-04-03 20:09	COWELCH@DELOITTE.COM	2018-04-03 20:26		
950	AMC.ENDUSER@YAHOO.COM	SF-Loan Delivery and Pooling Authorized Signer	Single Family Issuer	IS_1857	CONFIRMED	COWELCH@DELOITTE.COM	2018-05-08 15:28	STEVEYSON.JIMMY@GMAIL.COM	2018-05-08 15:31	COWELCH@DELOITTE.COM	2018-05-08 15:33		
545	TESTGMEP@DELOITTE.COM	SF-Agency Relationship User	Single Family Issuer	IS_1857	CONFIRMED	AMC.TESTER@YAHOO.COM	2018-04-03 20:07	STEVEYSON.JIMMY@GMAIL.COM	2018-04-03 20:09	COWELCH@DELOITTE.COM	2018-04-03 20:26		
885	AMC.GMUSER@GMAIL.COM	SF-Loan Delivery and Pooling Authorized Signer	Single Family Issuer	IS_1857	FINALIZED	COWELCH@DELOITTE.COM	2018-05-03 20:10	STEVEYSON.JIMMY@GMAIL.COM	2018-05-03 20:29	COWELCH@DELOITTE.COM	2018-05-03 20:36		
791	SEVEN@DELOITTE.COM	SF-Investor Reporting Authorized Signer	Single Family Issuer	IS_1857	CONFIRMED	AMC.TESTER@YAHOO.COM	2018-04-27 13:40	STEVEYSON.JIMMY@GMAIL.COM	2018-04-27 14:01	XELSYSADM	2018-04-27 16:20		
3402	ANKIBANSAL@DELOITTE.COM	O-PPA Operations	Operations	BP_06	CONFIRMED	PRCHALASANI@DELOITTE.COM	2018-07-30 11:58	ARAJESHKANDANATHA@DELOITTE.COM	2018-07-30 12:02	SANJITHALAPATI@DELOITTE.COM	2018-07-30 12:09		
1065	TESTLTUSER4@BNYM.COM	O-MBSQA	Operations	BP_02	CONFIRMED	ADCWVH8@BNYMELLON.COM	2018-05-11 10:12	ADC86BN@BNYMELLON.COM	2018-05-11 10:30	VASAVIKU MARREDDY.KURUKUNDA@BNYMELLON.COM	2018-05-11 11:41		
1085	AMC.USERREG@GMAIL.COM	SF-Compliance and Oversight User	Single Family Issuer	IS_1857	CONFIRMED	COWELCH@DELOITTE.COM	2018-05-14 12:10	STEVEYSON.JIMMY@GMAIL.COM	2018-05-14 12:12	COWELCH@DELOITTE.COM	2018-05-14 12:14		
1055	USER@DELOITTE.COM	SF-Investor Reporting Authorized Signer	Single Family Issuer	IS_1857	CONFIRMED	XELSYSADM	2018-05-15 14:55	AMC.TESTER@YAHOO.COM	2018-05-15 14:58	LAVMRKR@DELOITTE.COM	2018-07-31 10:49		
6643	TESTUSER1@BNYMELLON.COM	MF-Loan Delivery and Pooling Authorized Signer	Multi-family Issuer	IS_4147	CONFIRMED	ADC86BN@BNYMELLON.COM	2018-10-18 10:16	ADCWVH8@BNYMELLON.COM	2018-10-18 10:19	VASAVIKU MARREDDY.KURUKUNDA@BNYMELLON.COM	2018-10-18 10:57		

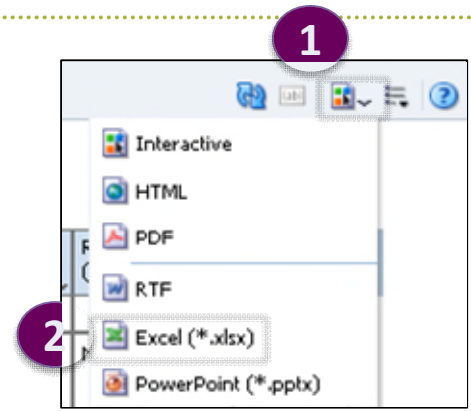
The report can be filtered and sorted by selecting the drop-down arrow in the column heading.

REPORTS TIPS

How to download, and save reports

Once the report is opened from ORACLE BI Publisher Enterprise it will appear in the same window.

1. Select the **View** icon.
2. Select the **Excel** option (or other file type if needed).
3. Your browser will download the file and allow you to open and save it.



How to create a list of active user accounts

From the ORACLE BI Publisher Enterprise Administrative Reports folder:

4. Select **Open** to view the **Home Organization User List** report.
5. Once the report is opened, select the **Status** column dropdown and check **Active** box.
6. The result will display only the active user accounts.

