

Department of Veterans Affairs

Lender/Service Administration

User Guide



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Version 2.0

Revision History

Date	Version	Description	Author
2/27/2013	1.0	Initial Version	S. Bard
5/15/2013	2.0	Appoint/Remove Other Admins update	P. Petry

Artifact Rationale

A User Guide is a technical communication document intended to give assistance to people using a particular system. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interface(s), and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, increment-level document, and should be updated to reflect the contents of the most recently deployed increment.

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1. Quick Guide to Lender/Service Administrative User Functions

1.1. Pin Reset

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Reset Lender/Service PIN**.
3. Click **Reset PIN**.
4. In the pop-up window, click **OK** to confirm your action.

1.2. Activate/Reactivate Users

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Activate Users > Lender/Service Users**.
3. In the list view, select the user account(s) that you want to activate, select **Approve** to activate the user account, or **Remove** to disallow activation.
4. Click **Submit**.
5. In the pop-up window, click **OK** to confirm your action.

1.3. Validate Users

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Validate Users > Lender/Service Users**.
3. In the list view, select the user account(s) that you want to validate, select **Approve** to validate the user account, or **Remove** to deactivate the user account.
4. Click **Submit**.
5. In the pop-up window, click **OK** to confirm your action.

1.4. Manage Admin Users and Remove Users

1. Open the WebLGY application.
2. From the top navigation bar, click **Admin > Manage Admin Users > Lender/Service Users** to open the Manage Lender Admin(s) page.
3. Selecting the **Add New Lender/Service Admin User(s)** link (top right) opens the Add Lender/Service Admin page. Selecting the **Remove Admin** link from the Action column opens a dialog box asking, “**Are you sure you want to remove Admin privileges for <User Name>?**” Select **OK** to remove Admin privileges or **Cancel** to keep.
4. When selecting the **Add New Lender/Service Admin User(s)** link and the Add Lender/Service Admin page opens, place a checkmark in the

box under the Admin column in the same row as the person who should obtain Admin privileges, and click **Submit**. On the Add Lender/Service Admin Page, there is an Excel icon that, when selected, will export the list to an Excel spreadsheet.

Selecting the **Remove User** link from the Remove User column in the same row as the person who should be removed opens a dialog box asking, “**Are you sure you want to remove <User Name> as a user?**” Select **OK** to remove the user or **Cancel** to keep.

2. Lender/Service Administrative User Functions

Each Lender and/or Service must designate at least one registered user to administer their employees who have the association of Lender and/or Service. This designated user will be considered an Administrative user and will have access to the following additional functions:

- PIN Reset
- Activate New Employee LGY (Loan Guaranty Service) System Users/Reactivate Inactive Employee LGY System Users
- Validate Active Employee LGY System Users

2.1. Lender And/Or Service Only Association

Each Lender and/or Service employee who registers for an account in the Veterans Information Portal (VIP) to use LGY applications for work, selects a Department of Veterans Affairs (VA) Affiliation. A user selecting Lender and/or Service affiliation is required to enter the employing Lender and/or Service ID **and** the active 8-character PIN associated with that ID.

The administrative functions of activating newly registering employees, reactivating inactivated employees and validating all active employees apply only to users that have selected **Lender and/or Service** as their affiliation.

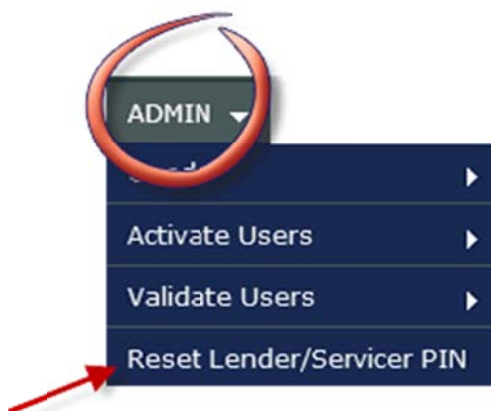
2.2. PIN Reset

PIN Reset is used to manually reset the PIN you will provide to an employee registering as a user of LGY applications. This is also the screen used to view the currently active PIN.

2.2.1. Resetting PIN

When you reset your PIN, the system will generate a new 8-character PIN which includes a combination of upper and lower case letters and numbers. The new PIN will be displayed on the screen and sent to you via e-mail. You are no longer allowed to create your own PIN. All PINs are system-generated.

Take the following steps to reset the PIN:



Step 1. Select **Admin** from the main horizontal menu, then click the last item in the drop-down menu **Reset Lender/Service PIN**.

A page will display that shows the Lender and/or Service Name, the current PIN, the date the PIN was last changed, and a button for resetting the PIN. There is also an area where an optional note may be entered.

Reset Lender/Service PIN

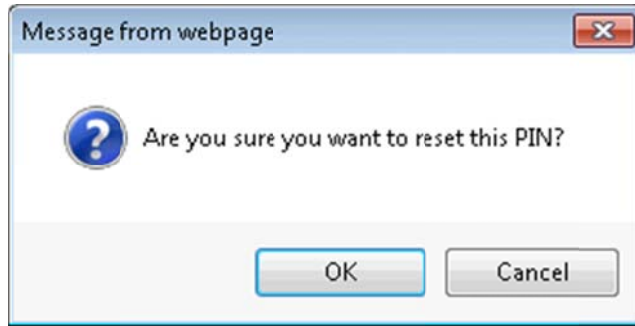
Name	Lender/Service	PIN	Last Changed	Reset
ABC-LENDER	Lender	PZ5BNULg	02/11/2013	Reset PIN
ABC-SERVICER	Service	ObT7dPEI	02/11/2013	Reset PIN

Optional Note:

Step 2. Enter an optional note for the reason of the PIN reset (maximum 1700 characters), or just select the **Reset PIN** button.



The system will display a message requesting verification of the PIN change.



Step 3. Select **OK** to reset the PIN. The system will generate and display a new 8-character PIN and the date the PIN was changed.

Lender(ABC-LENDER) PIN Reset to: ceKpfj9R

The system will also display a message that the PIN was successfully changed.

This new PIN should be provided to each registering and reactivating user with the affiliation of only Lender and/or Servicer.

Cancel will return you to the PIN Reset page with no action taken.

2.3. Activate/Reactivate Users

Activating and reactivating employee users are done on a single page. Please note that after employee users register or reactivate their account on VIP, they cannot access LGY applications **until** an Admin user activates them.

2.3.1. Activate User

Employee users that register on VIP for a new account must be activated by an Admin user.

2.3.2. Reactivate User

If an employee user becomes inactive, the employee must request reactivation on VIP for an Admin user to reactivate them.

Take the following steps to Activate/Reactivate Employees:



Step 1. Select **Admin** from the main horizontal menu, then click **Activate Users** in the drop-down menu. Admin users that are both Lender's and Servicer's must select which users they are activating (Lender or Servicer).

Employee users that have both the Lender and Servicer affiliation will only be activated/reactivated one time and will appear on the Lender Admin User's list. This means that the Servicer Admin takes no action. The Lender Admin approves the user for both roles.

A page will display that shows the users needing activation/reactivation. It displays User Name, User E-mail Address, the last four digits of the user's SSN, and a drop-down box where the Admin may select to approve the user for activation/reactivation, or remove the user from the list without activation/reactivation.

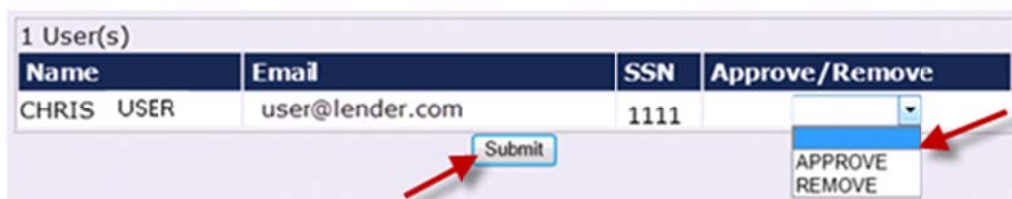


3 User(s)			
Name	Email	SSN	Approve/Remove
MIKE USER	user@lender.com	1111	
SUE USER	user@lender.com	1111	
BOB USER	user@lender.com	1111	

Submit

Step 2. For each user listed, the Admin should select to either approve or remove the user. When you have completed the activation of the users, select Submit.

Approved users have access to VIP and LGY applications. Users that are removed will not have access to VIP or LGY applications.

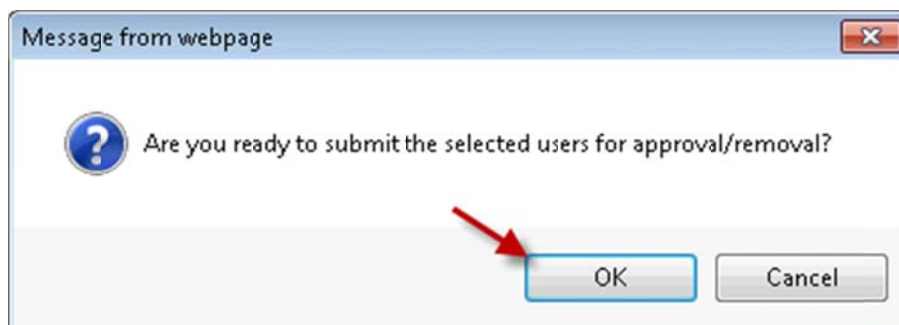


1 User(s)			
Name	Email	SSN	Approve/Remove
CHRIS USER	user@lender.com	1111	

Submit

APPROVE
REMOVE

The system will display a message requesting verification of the approve/remove user for activation.



Message from webpage

Are you ready to submit the selected users for approval/removal?

OK Cancel

Step 3. Select **OK** to activate and remove users as indicated. The system will also display a message that the users were approved/removed successfully.

Users Updated Successfully


Cancel will return you to the Activation page with no action taken. However, the data previously entered remains.

2.4. Validate Active Users

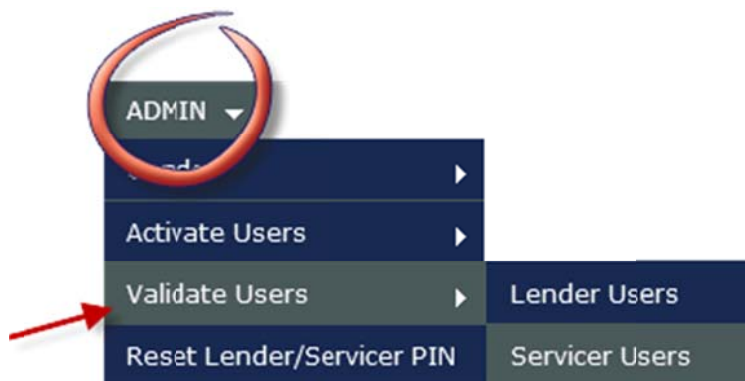
Every 90 days, each active employee must be validated by the Admin user in order to continue to have access to LGY applications. This function may also be used to remove users who are no longer employees or no longer need access to VIP and LGY applications.

2.4.1. Validating Active Employees

The validate users screen lists all active Lender and/or Servicer users currently affiliated with the Admin user's employer. Each employee user must be validated as still active (approve) or deactivated (removed).

 If no action is taken on an active employee by the expiration date, the user's account will automatically be deactivated.

Take the following steps to validate active employees:

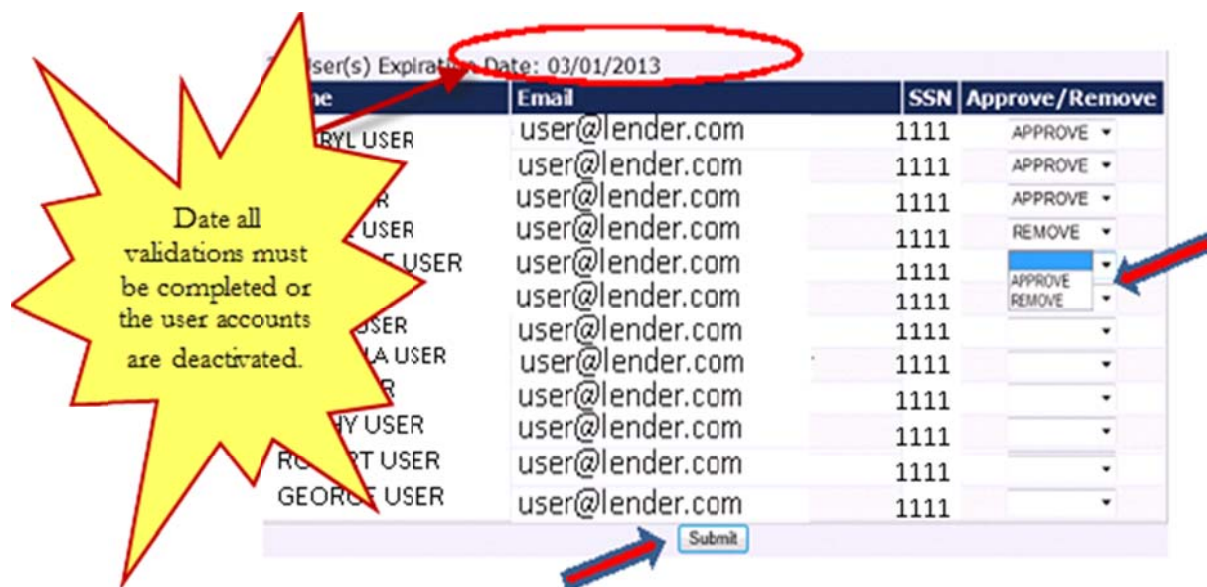


Step 1. Select **Admin** from the main horizontal menu, then click on the Validate Users in the drop-down menu. Admin users that are both Lender's and Servicer's must select which users they are activating (Lender or Servicer).

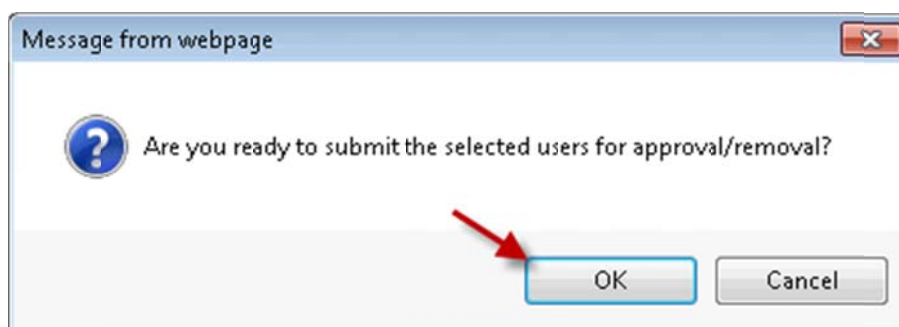
A page will display that shows the active users needing validation. It displays User Name, User E-mail Address, the last four digits of the user's SSN, and a drop-down box where the Admin selects approve to validate the user for continued access to VIP and LGY applications, or remove to take away the users access to VIP and LGY applications.

Step 2. For each user listed, the Admin should select to either approve or remove the user. When you have completed the validation of the users, select Submit.

Users that are approved will continue to have access to VIP and LGY applications. Users that are removed will no longer have access to VIP or LGY applications.



The system will display a message requesting verification of the approve/remove user for validation.



Step 4. Select **OK** to validate and remove users as indicated. The system will also display a message that the users were approved/removed successfully.

Users Updated Successfully

Cancel will return you to the Validation page with no action taken. However, the data previously entered remains.

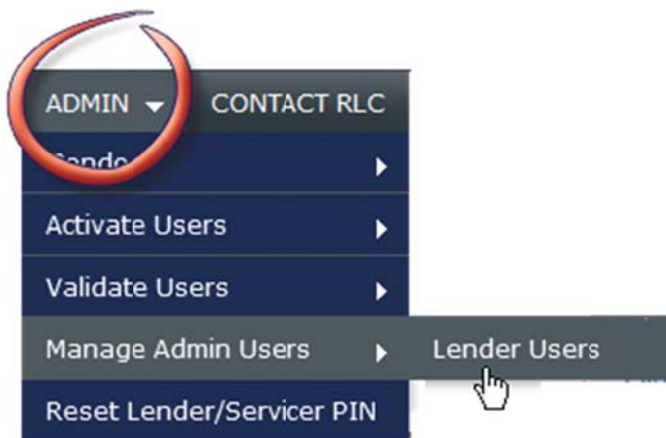
2.5. Manage Admin Users and Remove Users

Admin users are allowed to manage each other (Add or Remove Admin privileges) within LGY applications. This function may also be used to remove users who are no longer employees or no longer need access to VIP and LGY applications.

2.5.1. Add Admin Privileges/Export User List

The Manage Lender/Service Admin(s) screens list all active Lender and/or Service Admins currently affiliated with the Admin user's employer. If you are logged into the system as a Lender, you will see the Manage Lender Admin(s) screen; if you are logged into the system as a Service, you will see the Manage Service Admin(s) screen.

Take the following steps to add admin privileges:



Step 1. Select **Admin** from the top navigation menu, then click **Manage Admin Users** in the drop-down menu. In the fly-out menu, select **Lender Users** or **Service Users**, depending on available options. Admin users that are both Lender's and Service's will have both options available and must select which users they are promoting to Admin (Lender or Service).

Manage Lender Admin(s)

Current Lender Admin(s): 4 [Add New Lender Admin User\(s\)](#)

Name	SSN	Portal ID	Contact Info	Action
S User	___-__-____	S.User	Phone: Email: S.User@WAMU.NET	Remove Admin
M User	___-__-____	M.User	Phone: Email: M.User@WAMU.NET	Remove Admin
MI User	___-__-____	MI.User	Phone: Email: MI.User@WAMU.NET	Remove Admin
D User	___-__-____	D.User	Phone: Email: D.User@WAMU.NET	Remove Admin

A page will display that shows the active Admin users. It displays a table that lists User Name, the last four digits of the user's SSN, Portal ID, Contact Information, and a Remove Admin link that the Admin selects to remove Admin privileges from an Admin user. The page also has an Add New Lender/Service Admin User(s) link.

Step 2. Select the **Add New Lender/Service Admin User(s)** link.

Add Lender Admin(s)

Search Registered Users


Last Name

Portal ID

Last 4 SSN

Current Registered Users (Non-Admin): 1 [Manage Current Lender Admin User\(s\)](#)

Name	SSN	Portal ID	Contact Info	Admin	Remove User
N User	___-__-____	N.User	Phone: Email: N.User@WAMU.NET	<input checked="" type="checkbox"/>	Remove User

The Add Lender Admin(s) page opens and shows the list of current non-Admin registered users in a table that lists each user's name, last four of SSN, Portal ID, Contact Information, an Admin column, and a Remove User column. The Admin column contains a checkbox for each user listed; the Remove User column contains a Remove User link for each user listed. There is also an Excel icon  for exporting the list to an Excel spreadsheet.

Step 3. Select the Excel icon to export the list to a spreadsheet or place a checkmark in the checkbox under the Admin column and in the same row as the user(s) you wish to promote to Admin privileges. When completed, select **Submit**.

Lender Admin privileges successfully added for User

The system displays a message, "Lender/Service Admin privileges successfully added for <User Name>."

2.5.2. Remove Admin Privileges

Take the following steps to remove admin privileges:

Step 1. Select **Admin** from the top navigation menu, then click **Manage Admin Users** in the drop-down menu. In the fly-out menu, select **Lender Users** or **Service Users**, depending on available options. Admin users that are both

Lender's and Servicer's will have both options available and must select which users should have their Admin privileges removed (Lender or Servicer).

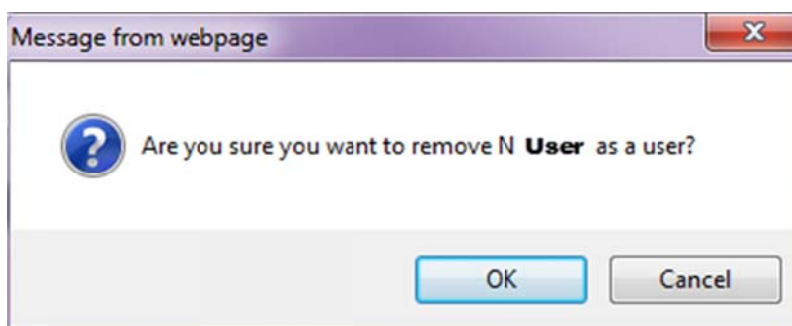
Manage Lender Admin(s)

Current Lender Admin(s): 4 [Add New Lender Admin User\(s\)](#)

Name	SSN	Portal ID	Contact Info	Action
S User	---_--_----	S.User	Phone: Email: S.User@WAMU.NET	Remove Admin
M User	---_--_----	M.User	Phone: Email: M.User@WAMU.NET	Remove Admin
MI User	---_--_----	MI.User	Phone: Email: MI.User@WAMU.NET	Remove Admin
D User	---_--_----	D.User	Phone: Email: D.User@WAMU.NET	Remove Admin

A page will display that shows the active Admin users. It displays a table that lists User Name, the last four digits of the user's SSN, Portal ID, Contact Information, and a Remove Admin link that the Admin selects to remove Admin privileges from an Admin user. The page also has an Add New Lender/Servicer Admin User(s) link.

Step 2. Select the **Remove Admin** link on the same row as the user who should have their Admin privileges removed.



The system will display a message requesting verification of the Admin privileges removal.

Step 3. Select **OK** to remove the Admin privileges for that user.

Lender Admin privileges successfully removed for User

The system displays a message, "**Lender/Servicer Admin privileges successfully removed for <User Name>.**"

2.5.3. Remove User

Take the following steps to remove a user:

Step 1. Select **Admin** from the top navigation menu, then click **Manage Admin Users** in the drop-down menu. In the fly-out menu, select **Lender Users** or **Servicer Users**, depending on available options. Admin users that are both Lender's and Servicer's will have both options available and must select which users they are promoting to Admin (Lender or Servicer).

Manage Lender Admin(s)				
Current Lender Admin(s): 4				
Name	SSN	Portal ID	Contact Info	Action
S User	---_--_----	S.User	Phone: Email: S.User@WAMU.NET	Remove Admin
M User	---_--_----	M.User	Phone: Email: M.User@WAMU.NET	Remove Admin
MI User	---_--_----	MI.User	Phone: Email: MI.User@WAMU.NET	Remove Admin
D User	---_--_----	D.User	Phone: Email: D.User@WAMU.NET	Remove Admin

A page will display that shows the active Admin users. It displays a table that lists User Name, the last four digits of the user's SSN, Portal ID, Contact Information, and a Remove Admin link that the Admin selects to remove Admin privileges from an Admin user. The page also has an Add New Lender/Service Admin User(s) link.

Step 2. Select the **Add New Lender/Service Admin User(s)** link.

Add Lender Admin(s)					
Search Registered Users Last Name <input type="text"/> Portal ID <input type="text"/> Last 4 SSN <input type="text"/> <input type="button" value="Search Users"/>					
Current Registered Users (Non-Admin): 660 660 Filtered Item(s) Displaying 1 - 50 Results Per Page: 25 Next Last					
Name	SSN	Portal ID	Contact Info	Admin	Remove User
NY-USER	---_--_----	NY.USER	Phone: Email: NY.USER@WAMU.NET	<input type="checkbox"/>	Remove User
KR-USER	---_--_----	K.USER	Phone: Email: K.USER@WAMU.NET	<input type="checkbox"/>	Remove User
E-USER	---_--_----	E.USER	Phone: Email: E.USER@WAMU.NET	<input type="checkbox"/>	Remove User
G-USER	---_--_----	G.USER	Phone: Email: G.USER@WAMU.NET	<input type="checkbox"/>	Remove User
C-USER	---_--_----	C.USER	Phone: Email: C.USER@WAMU.NET	<input type="checkbox"/>	Remove User

The Add Lender Admin(s) page opens and shows the list of current non-Admin registered users in a table that lists each user's name, last four of SSN, Portal ID, Contact Information, an Admin column, and a Remove User column. The Admin column contains a checkbox for each user listed; the Remove User column contains a Remove User link for each user listed.

Step 3. Select the **Remove User** link on the same row as the user who should be removed.

The system will display a message requesting verification of the removal.

Step 4. Select **OK** to remove the user.

User has been successfully removed

The system displays a message, "<User Name> has been successfully removed."