



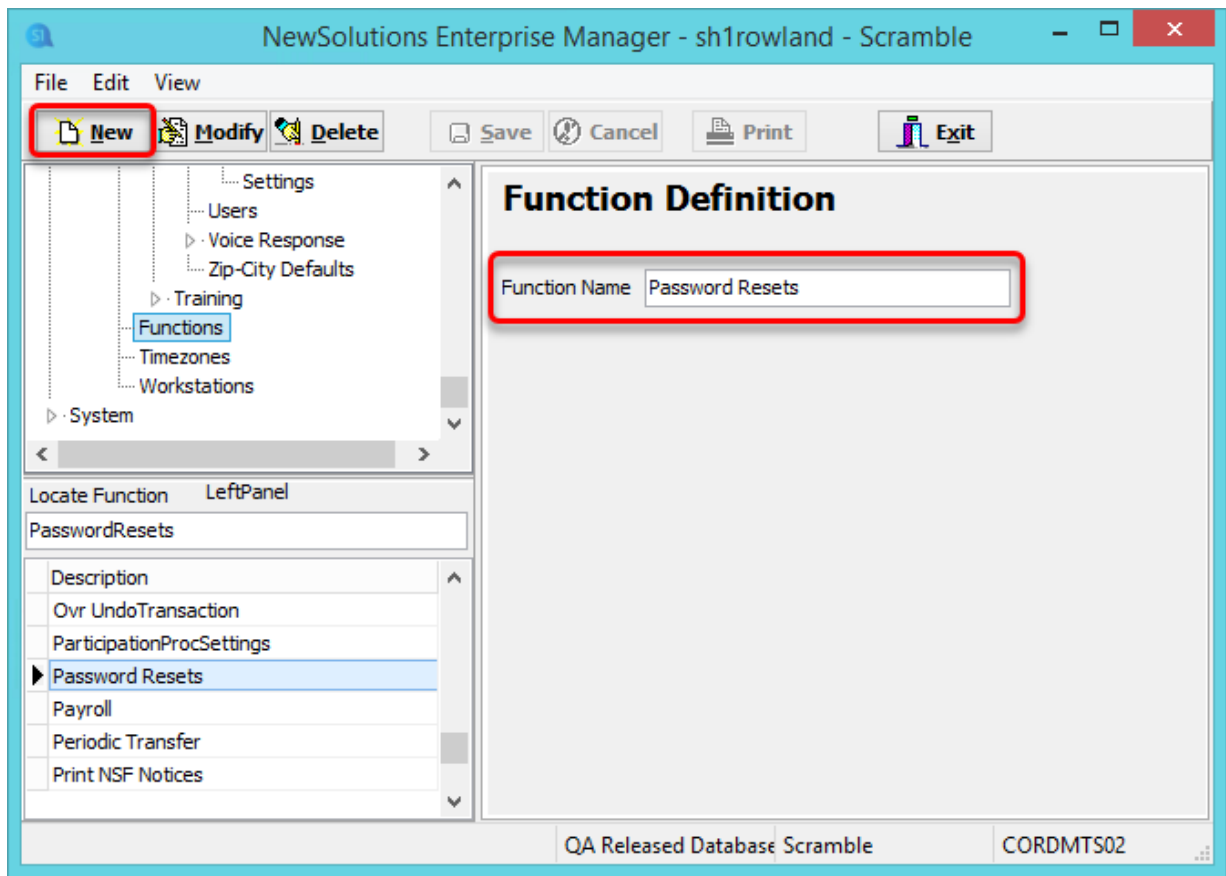
# Password Reset Role Guide

November 2019

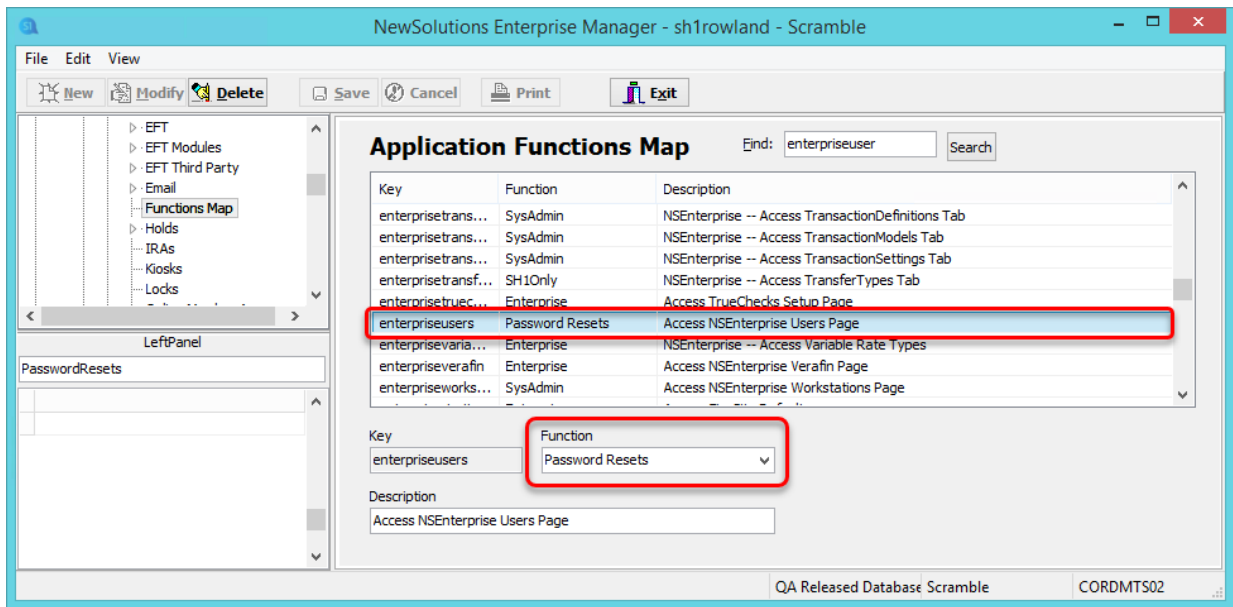
## Creating a Role for NewSolutions Password Resets

The screenshots below will guide you to setting up the function and assigning the new function to users to allow them Enterprise access to only edit the User settings (reset passwords). If there are any questions, please contact the customer support team at 1-800-888-0766 option 1.

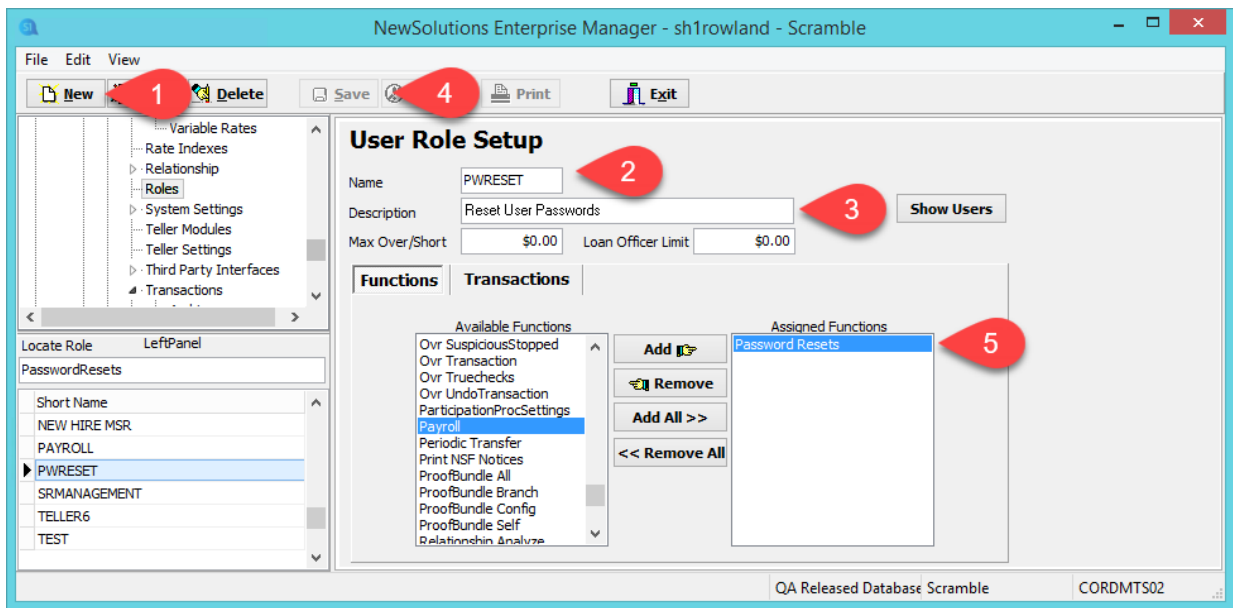
1. *Enterprise > Functions* – Create a Function to easily identify the ability to change User Passwords.



2. *Enterprise > Functions Map* – Locate the EnterpriseUsers Key and assign the new Function.



3. *Enterprise > Roles* – Create a role and assign this new function. Alternatively, assign it to an existing role, if desired. NOTE: You should create the role by entering the Name and Description and click Save, then you can assign functions.



4. *Enterprise > Users* – Assign the new role (if created) to the users that need access.

The screenshot shows the 'NewSolutions Enterprise Manager - sh1rowland - Scramble' window. The 'User Setup' form is displayed for user 'Bobby Rowland' (Code: 1425). The 'Roles' section is highlighted, showing a list of 'Available Roles' and an 'Assigned Roles' list. The 'Assigned Roles' list currently contains 'PWRESET'.

**User Setup Form Fields:**

- Login Name: Bobby
- Full Name: Bobby Rowland
- Password: [Masked]
- Password Expires (Days): [Empty]
- Last Password Change: 5/9/2018 11:40:31 AM
- Force Password Change: [Unchecked]
- Last Logged In: 8/29/2019 2:00:21 PM
- Last Login Attempt: 8/29/2019 2:00:21 PM
- Number of Attempts: 0
- Tax ID: [Masked]
- Code: 1425
- Default Organization: QA\_RELEASE
- Default Database: Scramble
- Form Signature: [Empty]
- Email Address: [Empty]
- Phone /Extension: [Empty]
- Job Title: [Empty]
- Department: [Empty]
- NMLS Number: [Empty]

**Roles Section:**

- Available Roles:** LOAN OFFICER, LOANFUNDPROC, MANAGER, MAX OVRDE, MSR, NEW HIRE MSR, PAYROLL, SRMANAGEMENT, TELLER6, TEST.
- Assigned Roles:** PWRESET (highlighted with a red box).

**Other Sections:**

- Hide Inactive Users:** System Administrator [Unchecked], Active User [Checked], Disabled [Unchecked], Allow Multiple Logins [Unchecked].
- Disbursement Limits:** Cash [Empty], Check [Empty].
- Assign Department:** [Empty].
- Edoc:** User Name [Empty], Password [Empty].

**User List (Left Panel):**

Login Name	User Code
AudioUser	0
Autouser	1000
Becky	0
Bobby	1425
cashUser	0
crussell	1470
demouser1	101
demouser2	102
demouser3	103
demouser4	104
demouser5	105

**Status Bar:** QA Released Database Scramble | CORDMTS02

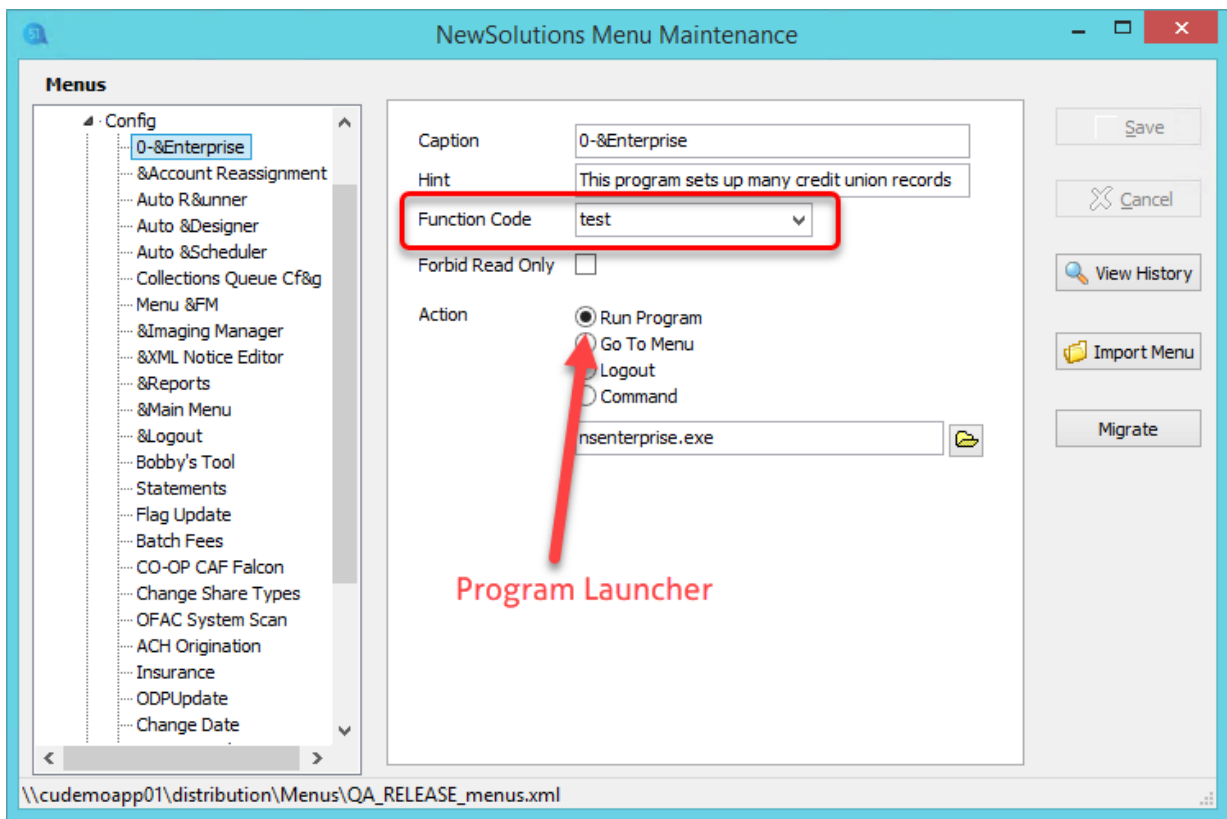
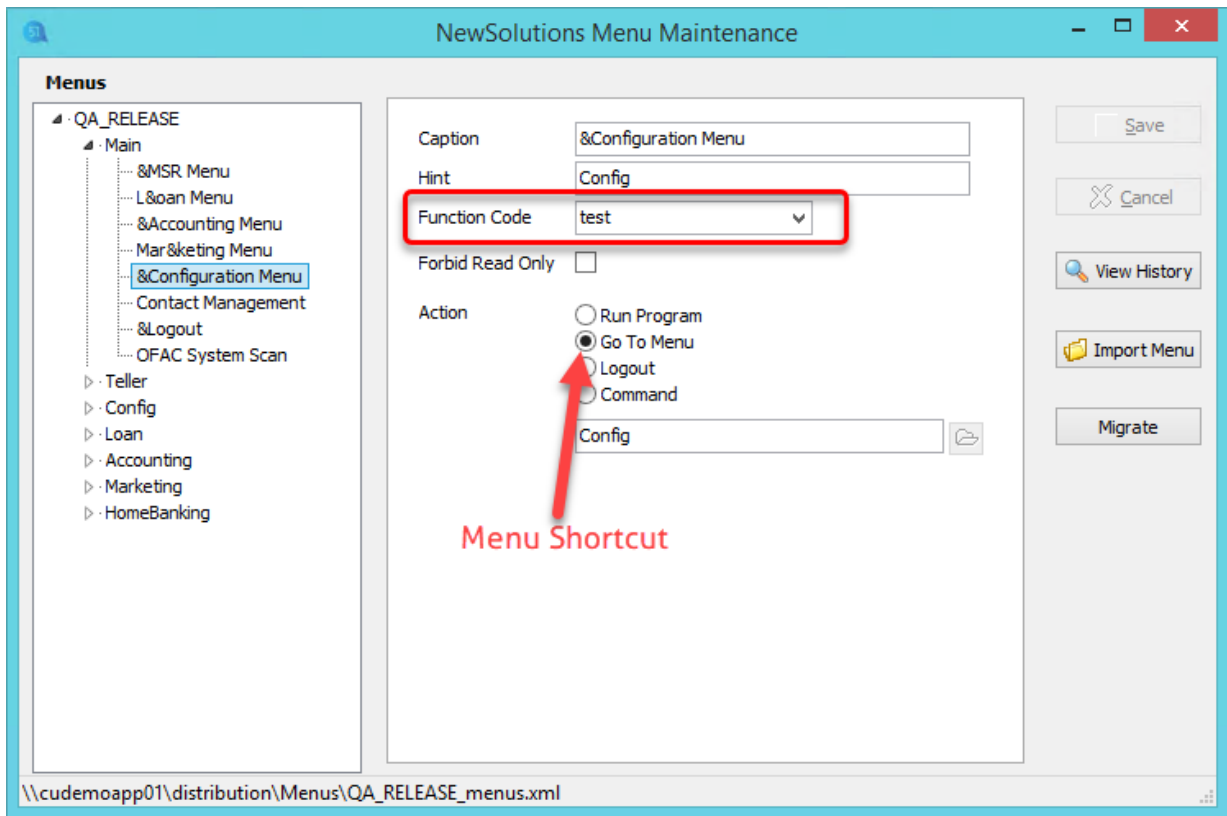
5. When the user logs in, assuming no other Enterprise functionality has been assigned to their user profile, the screenshot below is what enterprise looks like.

The screenshot displays the 'NewSolutions Enterprise Manager - Bobby - Scramble' application window. The interface includes a menu bar (File, Edit, View), a toolbar with buttons for New, Modify, Delete, Save, Cancel, Print, and Exit, and a left-hand navigation tree. The tree shows a hierarchy: Organizations > QA\_RELEASE > Databases > Scramble > Products > Address Verification > Internal OFAC > Users. The 'Users' folder is expanded, showing a list of users with 'crussell' selected. The main area is titled 'User Setup' and contains various fields for user information. The 'Login Name' is 'crussell' and the 'User Code' is '1470'. The 'Full Name' is 'Carole Russell'. The 'Password' is masked with dots. The 'Last Password Change' is '7/2/2014 9:38:55 AM'. The 'Last Logged In' and 'Last Login Attempt' are both '6/28/2017 11:34:23 AM'. The 'Number of Attempts' is '0'. The 'Tax ID' is empty. The 'Default Organization' is 'QA\_RELEASE' and the 'Default Database' is 'Scramble'. The 'Email Address' is 'crussell@shareone.com'. The 'Form Signature' is empty. The 'Phone /Extension' is empty. The 'Job Title' is empty. The 'Department' is empty. The 'NMLS Number' is empty. The 'Roles' section shows 'Available Roles' (ACCT LEVEL 1, ACCT LEVEL 2, ACCT PAYABLE, AUDIT/BOARD, BATCHUSER, BOARD, BRMANAGER, CODE, COLL LEVEL 1, COLL LEVEL 2) and 'Assigned Roles' (MSR). The 'Disbursement Limits' section shows 'Cash' and 'Check' limits. The 'Assign Department' section is empty. The 'Edoc' section shows 'User Name' and 'Password' fields. The status bar at the bottom indicates 'QA Released Database Scramble' and 'CORDMTS02'.

Login Name	User Code
AudioUser	0
Autouser	1000
Becky	0
Bobby	1425
cashUser	0
crussell	1470
demouser1	101
demouser2	102
demouser3	103
demouser4	104
demouser5	105

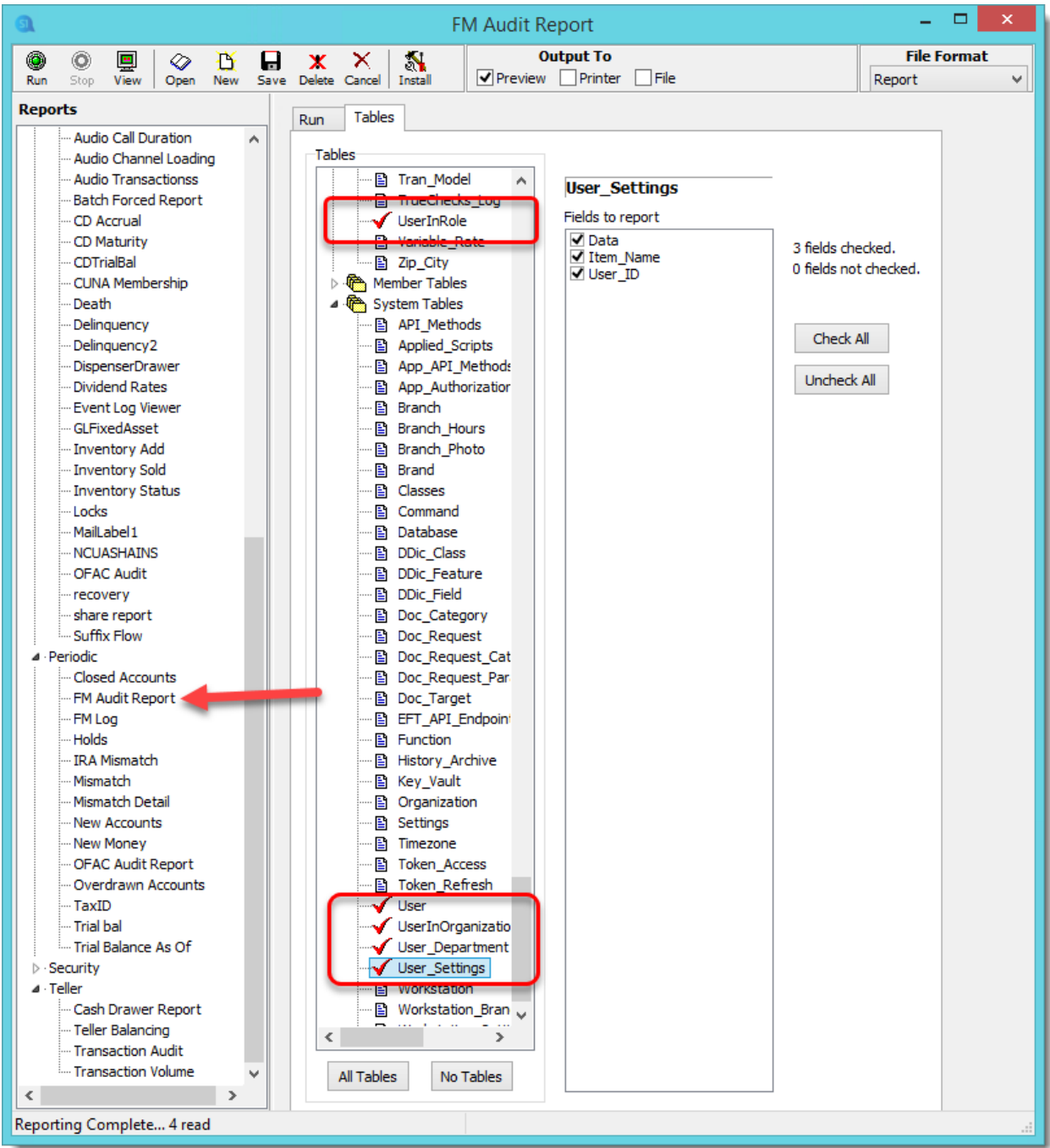
NOTES:

1. MenuFM – Many credit unions have functions assigned on the Menu shortcuts and the programs within them. The CU will need to review their setup because this can prevent users from accessing Enterprise even if they have some form of access assigned. If the Function Code in MenuFM doesn't align with the functions assigned to them, they will not be able to access the platform, regardless of how they view the menu (Button, List, or Tree). Below is a screenshot for a Menu shortcut and for the program. Also, another bit of info that's worth noting is that the Menu Shortcut and the Program Launcher can have two different function codes assigned. There is a hierarchy: You must have access to the menu to have access to the program launcher. This means if my user has the function required to launch the program, but not the function to access the menu, I still cannot see the program in any view! This is something I struggle to remember when I'm trying to work on roles on-site. (see screenshots on next page).



2. Auditing – Because you are granting access to the full Users profile in Enterprise, a user does have the ability to make changes beyond resetting the password and setting the Force Password Change flag. They can assign/remove roles from users. I would highly recommend the FM Audit Report be set up to monitor the UserInRole table under Control Tables and the User, UserInOrganization, User\_Department, and User\_Settings tables under System Tables. This could be automated for monitoring on a periodic basis. Below are the screenshots of what tables to select and what it looks like when user roles are modified.





11/12/2019 11:40  
Report FM1002-D  
Database Scramble

File Maintenance Audit Report  
QA Released Database

11/12/2019 Page 1

Search Criteria

From Date: 11/12/2019  
To Date:  
System Table(s): User,UserInOrganization,User\_Department,User\_Settings  
Control Table(s): UserInRole  
Member Table(s):  
Account Number:  
User:

Date and Time Action/User	Table.Field Account.Suffix	Old Value/New Value/Record Description
11/12/19 11:21:47 Delete shlrowland	UserInRole	Key: (580) user Bobby role Member Service Representative
11/12/19 11:21:47 Delete shlrowland	UserInRole	Key: (749) user Bobby role Batch User
11/12/19 11:21:47 Delete shlrowland	UserInRole	Key: (790) user Bobby role Teller Role
11/12/19 11:21:59 Add shlrowland	UserInRole	Key: (921) user Bobby role Reset User Passwords