LOAN SERVICING SOFT Security Features

This document will guide you through the process of setting up and understanding the security features in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

User permissions are configured by creating user groups and setting permissions for the groups. Users can then be added to the system and assigned to a group. The Users will inherit the security settings assigned to that group.

User Groups

User Groups in LOAN SERVICING SOFT categorize each user in the system. Each User Group can have a different set of system permissions. Users can be a member of multiple groups, granting each group's permissions to the user. The default User Groups that come with LOAN SERVICING SOFT are Administrators, Checks, Collections, Origination, Servicing, and Users.

To add a new group, go to Control Panel → IT Administration → Security → Users and click the **Add Group** button. Give the group a unique Group Name, used internally by LOAN SERVICING SOFT, and a unique Display Name.
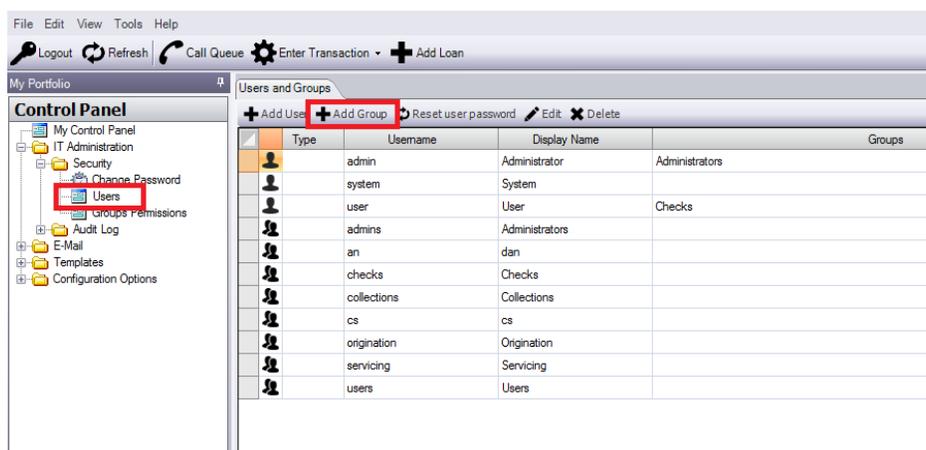
Users

To add a new User, click the **Add User** button.
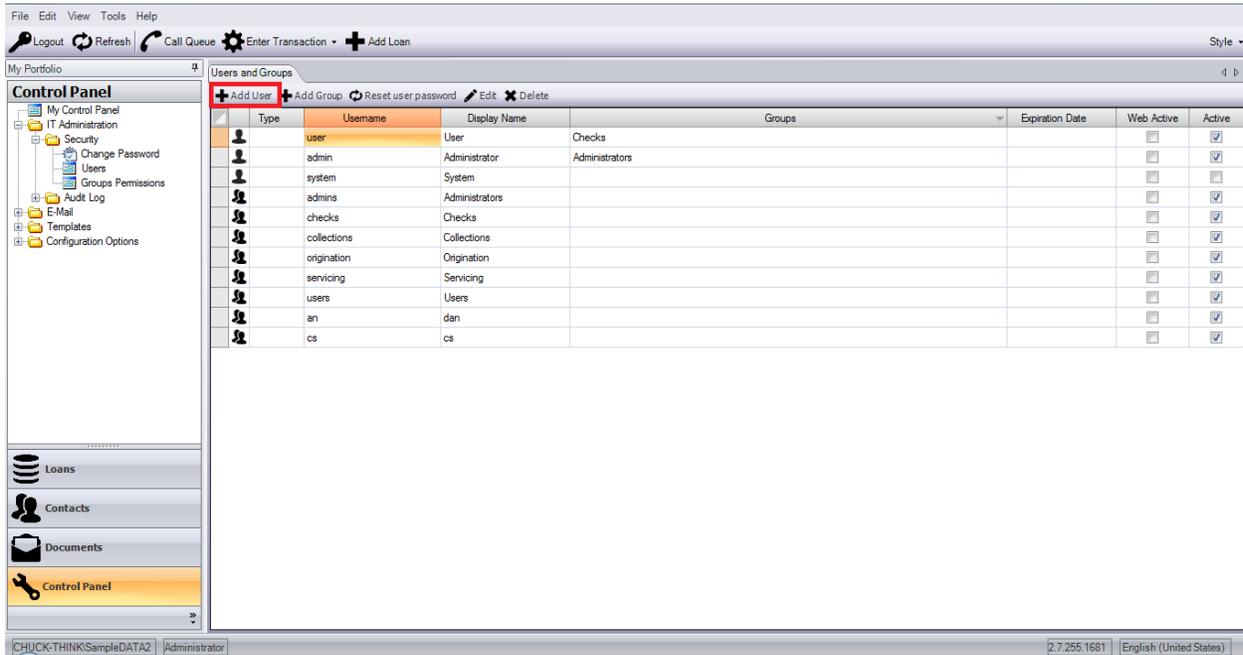
In the new window, fill out the users information. Double clicking on a user brings up the User Properties Object Window.
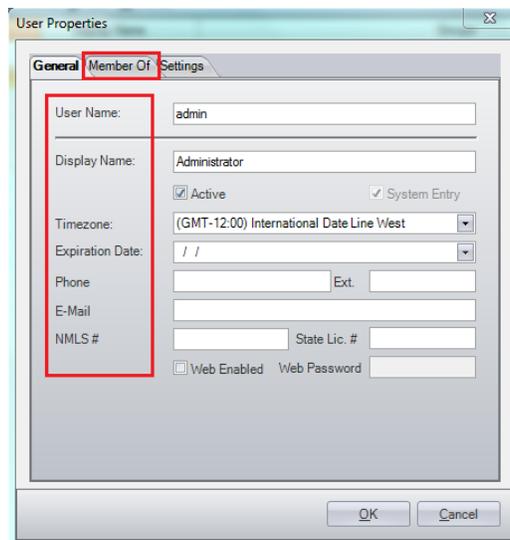
The following list clarifies some of the fields:

- User Name – This is the name the user enters when logging on.
- Display Name – The name as it is displayed within the system.
- Active – Whether or not this user account is useable.
- Expiration Date – The date this account will expire.
- E-Mail – The e-mail address that LOAN SERVICING SOFT will use for this user.
- Web Enabled – Whether or not the user will be active for LOAN SERVICING SOFT Web Portals.
- Password – The password the user will use to log in to LOAN SERVICING SOFT.

On the Member Of tab, click **Add** to add the new user to one or more User Groups.

Group Permissions

To edit a User Group's permissions, go to Control Panel → IT Administration → Security → Groups Permissions. Select a User Group from the left column and modify the permissions for all users in that group in the right column by checking or unchecking system processes. Once the groups permissions have been modified, click **Save** in the top left to apply the new group permissions.
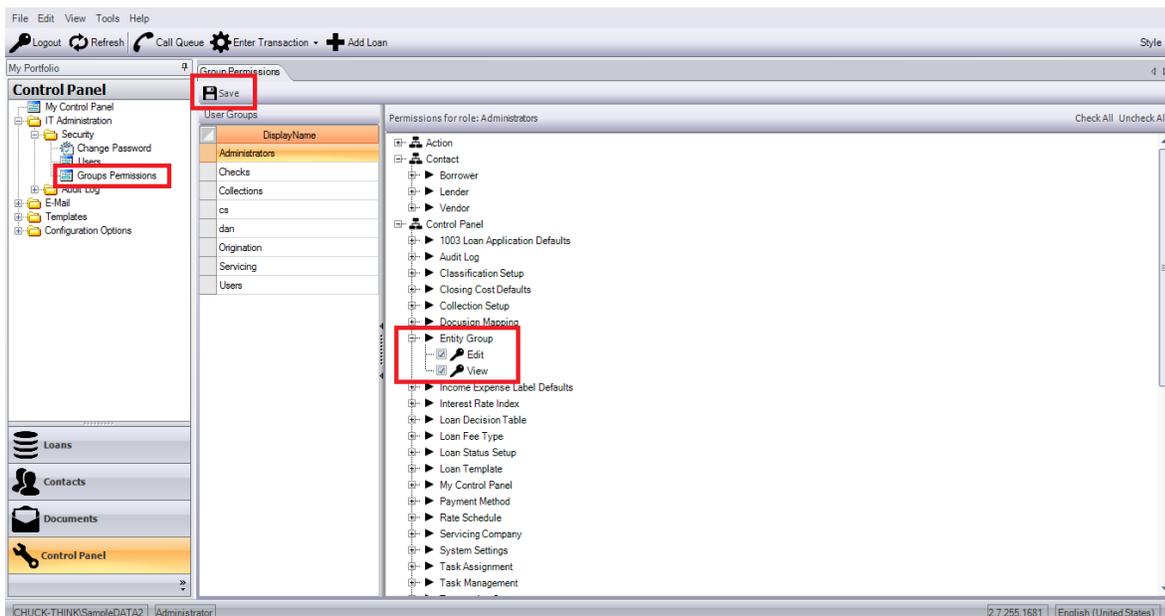
Password Policy

An admin of LSS is able to specify how many characters a password should be, if the new password will expire in a number of days or in how many days the user can change his password. There are also complexity requirement rules that can be turned on. To access these settings:

1. Click the Control Panel tab
2. Open the configuration options folder
3. Select System Defaults and Settings
4. In the window that opens select System Settings
5. In the Settings window click the Security Settings tab. On this tab there will be a text box explaining what the Password Policy settings do.
6. Click Save when you are done configuring your password policy

Force User Password Change

On the user screen there is an option that an Admin can use to force a user to change their password the next time they log in.

To access this option:

1. Click the Control Panel Tab
2. Open the IT Administration folder
3. Open the Security folder
4. Click the Users tab
5. Select a user

6. A User Properties window will come up and you must select a checkbox that says user must change password at next login.
7. When you are done making changes click OK.