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OUS v.2.1 System Administrator Guide for Seller/Servicers

February 2013

Table of Contents

Overview

This manual provides instructions for using Freddie Mac's Origination & Underwriting System (OUS) version 2.1. The instructions in this manual assume you are currently registered as a System Administrator for your organization.

OUS is Freddie Mac's integrated database and application software that automates much of the workflow involved in processing loan applications from receipt of the Loan Submission Template (LST) all the way through the underwriting process.

By referring to this manual, you will be able to grant access to individuals at your organization who need access to Freddie Mac's Origination & Underwriting System and thereafter maintain (i.e., change or de-activate) their access capability.

OUS Registration Process

Granting user access rights in OUS is a two-step process.

1) Before a user can be granted access rights to OUS, you must first register the individual via the MultiSuite Online Registration System.
2) The MultiSuite ID will be used as the Log In ID for OUS. As the system administrator, you will use this information when creating user accounts in OUS.

OUS User Roles

OUS is a rules-based system. Business rules govern key system behaviors and options available to users, depending on the characteristics of a deal and Freddie Mac's policies and procedures pertaining to it. It uses role-based permissions to define each user's permissions to act on deals in the system. The functions available are limited to those responsibilities associated with the role in the deal workflow.

A user role determines a designated user's authority within your organization to access various screens and perform selected functions within the system. In setting up users for OUS access, you'll need to consider the following roles:

- Company Office Administrator *****
- Security Administrator *****
- Analyst
- Loan Support
- Originator
- Submitter

It is possible to assign employees more than one user role. For the Analyst, Loan Support, Originator and Submitter, a single user can be assigned all or any combination of these roles.

**** For the Company Office Administrator or Security Administrator roles, a single user should be assigned to one of these two roles, but <u>not</u> both. It is recommended that the Administrator not be assigned any additional roles.***

Refer to the OUS Function Descriptions and the Function Access Rights by User Role sections (pages 5-6) to help you identify who at your organization should be assigned which role.

OUS Function Descriptions

OUS Functions	Descriptions
Import a Deal Template	Import the Loan Submission Template (LST) version 1.4 or 2.1 via the Import Deal Template screen.
Validate a Deal and Send to Freddie Mac	Run a validation on the entered data field for the deal. Once a deal has passed validation, the Send to Freddie Mac button will be activated, and the user will be able to submit the deal.
Add, View, E-Mail Files from the File Cabinet	Add documents to the deal file, retrieve files already attached for viewing or emailing, and organize deal files.
Change Status for Release 1 Deals	Change the status from Submitted to Dead for Release 1 deals submitted via LST 1.4.
Delete a Deal	Delete deals if they have not yet been sent to Freddie Mac.
Assign Users to Deal	Assign a deal to one or more individuals. An individual assigned to the deal can assign it to other individuals within the same organization.
Run Reports	Run reports based on views and tables within the application. Export the generated results to Excel, Word, PDF, etc.
View Import Deal Template Screen	View the screen that is used to import a new deal into the system.
Search for a Deal	Search for a deal using keyword entry.
View Deal List and Deal List (Rel. 1)	View a listing of the deals assigned to the user. The Deal List screen displays all deals imported using LST 2.1. The Deal list (Rel. 1) screen displays the deals imported using LST 1.4.
View Deal Validation Results	View a snapshot of the current status of the deal and the imported values. The Data Validation Grid contains all the fields imported or entered.
View and Update Data Input Screens for TAH Deals	View screens accessed by authorized users to correct any validation errors and/or to add any new data. Each input screen displays information from the corresponding section of the Deal Template.
View Deal Header Information	View key identifying information about the deal — including Deal Name, Status, Loan Amount and Loan Number (if successfully submitted to Freddie Mac). Header information is displayed at the top of all screens.
User Setup (Add, Edit and De-Activate Users)	Perform this function: (1) when new users join your organization; (2) when users experience role changes; (3) when users are leaving your organization and therefore need to be de-activated.

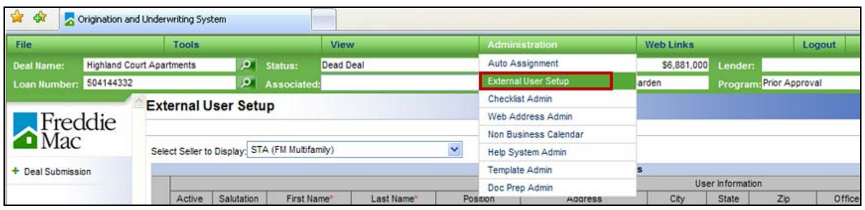
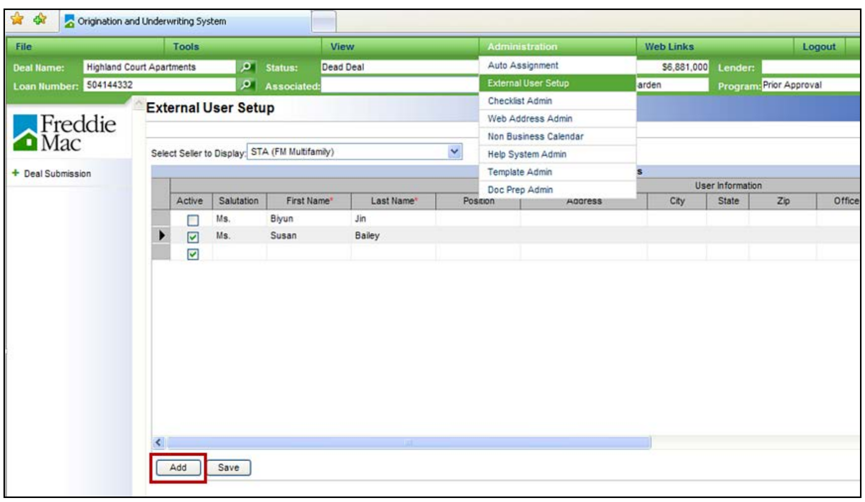
Function Access Rights by User Role

If a user needs to . . .	One of the user's roles (as it appears on the OUS screen) must be . . .					
	Analyst	**Company Office Admin**	**Loan Support**	**Originator**	**ExtSecurity Admin**	**ExtSubmitter**
Import a Deal Template	NA	NA	NA	NA	NA	✓
Validate a Deal and Submit to Freddie Mac	✓	NA	✓	✓	NA	✓
Add, View, E-Mail Files for Documents Associated with a Deal (Access the File Cabinet)	✓	NA	✓	✓	NA	✓
Change Deal Status	✓	NA	✓	✓	NA	✓
Delete a Deal	✓	NA	✓	✓	NA	✓
Assign Users to a Deal	✓	NA	✓	✓	NA	✓
Run Reports	✓	✓	✓	✓	NA	✓
Search for a Deal	✓	✓	✓	✓	NA	✓
View Deal List and Deal List (Rel. 1)	✓	✓	✓	✓	NA	✓
View Import Deal Template Screen	✓	✓	✓	✓	NA	✓
View Deal Validation Results	✓	✓	✓	✓	NA	✓
View Data Input Screens for TAH Deals	✓	✓	✓	✓	NA	✓
Update Input Screens for TAH deals	✓	NA	✓	✓	NA	✓
View Deal Header Information	✓	✓	✓	✓	✓	✓
Add, Edit and De-Activate Users	NA	NA	NA	NA	✓	NA

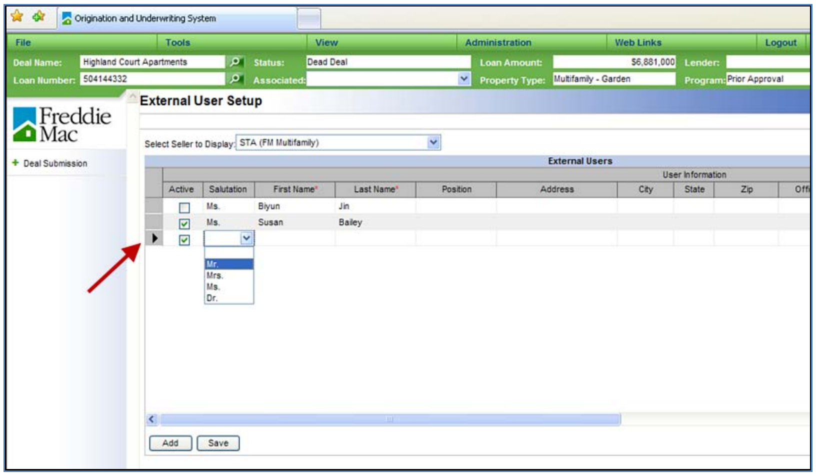
Add a New User

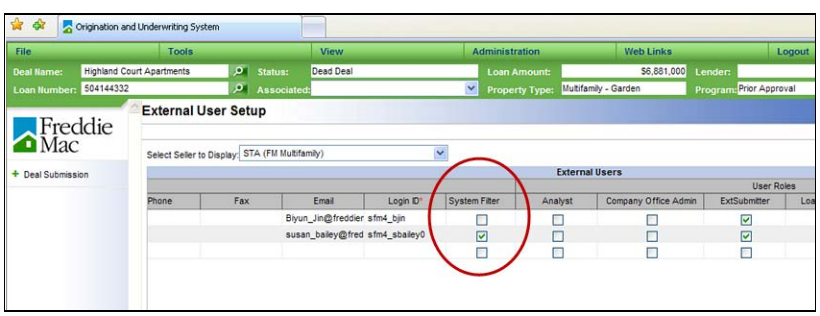
As the OUS System Administrator identified for your organization, you received an email from multifamily_security@freddiemac.com outlining your log in information and system access. You now have the ability to access the Administration menu for External User Setup. The following steps show you how to add a new user.

Note: The screens provided are visual aids to guide you through the process. Your view may differ due to your system configuration.

Step	Action
1	From the top navigation menu, select **Administration** then **External User Setup**. 
2	You will see the **External User Setup** screen. Click the **Add** button. 

Add a New User, continued

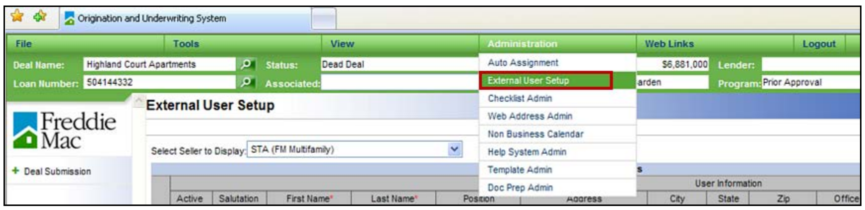
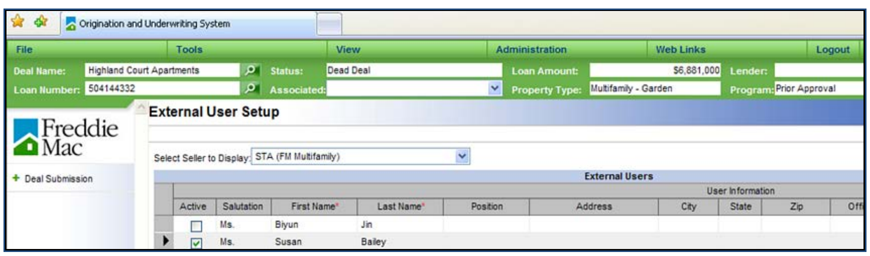
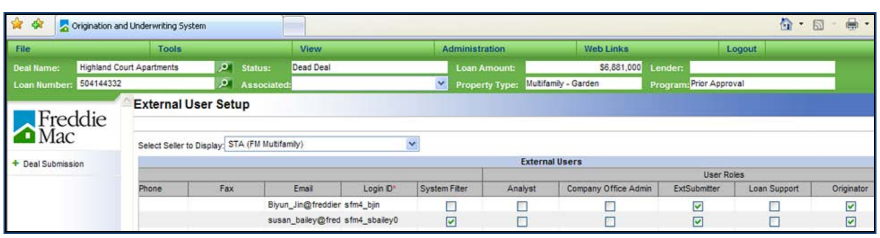
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>A new row appears in the External Users grid. Click on the shaded cell, in the first column of that row, to enable data input (as indicated with the arrow below).

</td></tr>
<tr><td>4</td><td>Check the Active box and click in each field to enter the user information.
Note: Fields with the * require data input. You need to enter the user's First Name, Last Name and Log In ID. The Log In ID must be the same as their MultiSuite ID.</td></tr>
<tr><td>5</td><td>You can set a System Filter for users. Check the System Filter box if you wish to limit the user's access to his/her deals only. Do not check this box if the user should have access to all deals within your organization.

Note: It is recommended that individuals assigned to the Security Administrator, Submitter, Originator or Analyst roles be granted access to their deals only. Individuals assigned to the Company Office Administrator or Loan Support roles should be granted access to all deals within your organization. Although the above represents Freddie Mac's recommendation, each Seller organization must decide how to manage the user's access to deals based on business needs.

</td></tr>
<tr><td>6</td><td>Click the Save button.</td></tr>
</table>

Edit a User Account

The following steps show you how to change information for a current user.

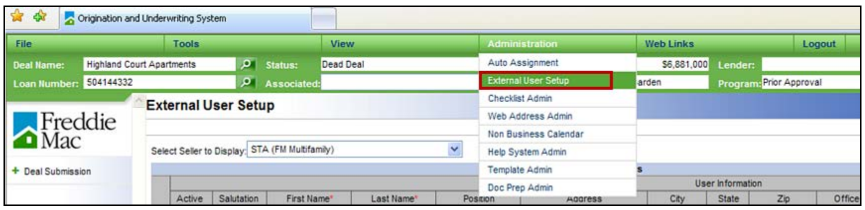
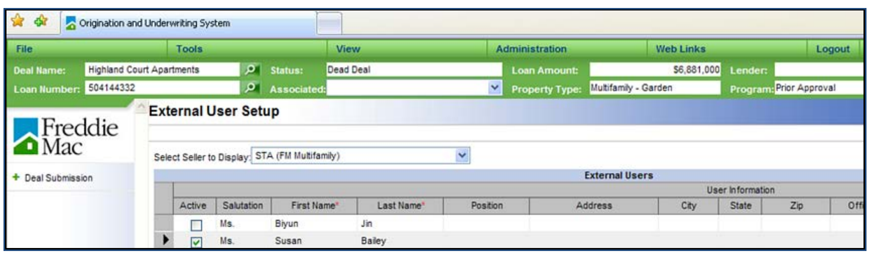
Note: The screens provided are visual aids to guide you through the process. Your view may differ due to your system configuration.

Step	Action
1	From the top navigation menu, select **Administration** then **External User Setup**. 
2	You will see the **External User Setup** screen. Select the shaded cell of the user account you want to modify. 
3	Click the applicable field(s) for the **User Information** and edit as necessary. Check/uncheck any changes to the **System Filter** or **User Roles**. 
4	Click the **Save** button.

De-activate a User Account

The following steps show you how to de-activate a current user.

Note: The screens provided are visual aids to guide you through the process. Your view may differ due to your system configuration.

Step	Action
1	From the top navigation menu, select **Administration** then **External User Setup**. 
2	You will see the **External User Setup** screen. Select the shaded cell of the user account you want to de-activate and click the **Active** box to remove the check mark. 
3	Click the **Save** button.

Help and Support

Contact 866 MULTI-FM (866-685-8436) to speak to a Freddie Mac representative.

Your Implementation Manager can provide support for user roles, process, technical questions and general OUS post-implementation support.