

Creating and managing Custom Report Categories within Fannie Mae Connect

Follow the steps in this document to assign the Whole Loan Purchase Advice (WLPA) reports to a newly created Custom Report Category and grant a third-party organization access to only those reports within Fannie Mae Connect[™].

A. Create a new Custom Report Category

- **1** Login to Fannie Mae Connect as a Report Administrator.
- 2 Click on the **Report Access Management** tab in the top menu.



3 Scroll down the page to the **Create a New Category** section.

Save Cancel			
Create Curtom Categories (Ontional)			
Create Custom Categories (Optional)			
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES			
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie	ss for existing reports and are in addition to the e	xisting categories available in Report Center.	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie	is for existing reports and are in addition to the e	xisting categories available in Report Center.	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie Create a New Category	ss for existing reports and are in addition to the e	wisting categories available in Report Center. Edit Custom Category Name	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie Create a New Category	is for existing reports and are in addition to the e	xisting categories available in Report Center. Edit Custom Category Name	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie Create a New Category Category Name	is for existing reports and are in addition to the e	xisting categories available in Report Centec. Edit Custom Category Name Custom Categories	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie Create a New Category Category Name Enter custom category name	is for existing reports and are in addition to the e	xisting categories available in Report Center. Edit Custom Category Name Custom Categories Select a custom category	
Create Custom Categories (Optional) ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categorie Create a New Category Category Name Enter custom category name	is for existing reports and are in addition to the e	xisting categories eveilable in Report Center. Edit Custom Category Name Custom Categories Select a custom category	T



4 Create a name for the new category (e.g. "Direct Assignment").

ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique cate	gories for existing reports and are in add	lition to the existing categories available in Report Center.
Create a New Category		Edit Custom Category Name
Category Name		Custom Categories
Direct Assignment	17/40	Select a custom category
Add Category		

5 Click Add Category to save the changes.

ABOUT CUSTOM CATEGORIES Custom categories allow you to create unique categories for existing reports	and are in addition to the existing categories available in Report Center
Create a New Category	Edit Custom Category
Category Name	Custom Categories
Enter custom category name	Select a custom catego
Add Category	
A Catagony has been saved	



B. Assign report(s) to the new Custom Report Category

6 Scroll up to the **Assign Reports to Categories** section.

7 Select the new Report Category that you created in Step 4.

			Home	Report Center	Report Access Management	Fee Lookup Tool
Report Access Ma	inagement					
Manage Report Categories Ma	nage User Access for Custom	Categories Manage Restricted Re	eport Access			
	μę					
Manage Report Catego	ries					
A						
Assign Reports to Categor	ries					
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign reports	r ies EGORIES 5 to Report Categories for disp	play in Report Center. Access to repo	orts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	irts
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign reports available to your users. Click here	ries EGORIES s to Report Categories for disj <u>e to learn more</u> ,	play in Report Center, Access to repo	rts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	rts
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign report available to your users. Click here Select a Report Category	ries EGORIES 5 to Report Categories for disy e to learn more.	play in Report Center, Access to repo	rts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	rts
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign reports available to your users. Click here Select a Report Category Select Category	ries EGORIES 5 to Report Categories for disj e to learn more.	play in Report Center. Access to repo	arts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	irts
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign reports available to your users. Click here Select a Report Category Select Category Direct Assignment	ries EGORIES s to Report Categories for disp e to Learn more,	play in Report Center. Access to repo	rts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	rts
Assign Reports to Categor ABOUT ASSIGNING REPORTS TO CAT Use this section to assign reports available to your users. Click here Select a Report Category Select Category Direct Assignment Gio_regression_cust	ries EGORIES s to Report Categories for disp e to learn more.	play in Report Center. Access to repo Assigned to Selected Categ	orts is provisioned by Report Categ	ory, so changing the	ese assignments may affect repo	rts

- 8 Type "Whole Loan Purchase Advice" in the field below the **All Available Reports** heading.
- 9 Select the Seller and Servicer versions of the report and move them to the right by clicking the **Add**→ button.

Direct Assignment		
All Available Reports	Assigned to Selected Category	IMPORIANT
Whole Loan Purchase Advice	9 Search	
Whole Loan Purchase Advice (Seller Version) - Beta	Add 🗲	Images depicted in steps 9 and 10 show multiple versions of the report, some of which retired on
Whole Loan Purchase Advice (Seller Version) - Enhanced	€ Remove	January 14, 2021. Be sure to select the following reports:
Whole Loan Purchase Advice (Servicing Version) - Beta		• Whole Loan Purchase Advice (Seller Version)
Whole Loan Purchase Advice (Servicing Version) - Enhanced •		Whole Loan Purchase Advice (Servicing Version



Assign Reports to Categories		
ABOUT ASSIGNING REPORTS TO CATEGORIES Use this section to assign reports to Repor available to your users. <u>Click here to learn</u>	rt Categories for display in more,	Report Center. Access to reports is provisioned by Report Category, so changing these assignments may affect re
Select a Report Category		
Direct Assignment	•	
All Available Reports		Assigned to Selected Category
Whole Loan Purchase Advice		Search
		Whole Loan Purchase Advice (Seller Version) - Beta
	Add →	Whole Loan Purchase Advice (Seller Version) – Enhanced
		Whole Loan Purchase Advice (Servicing Version) - Beta
		Whole Loan Purchase Advice (Servicing Version) - Enhanced

11 A confirmation message will appear once the changes have been saved.

Select Category	•		
All Available Reports		Assigned to Selected Category	
Whole Loan Purchase Advice		Search	
	Add ->		
	← Remove		
Save Cancel			



C. Assign user(s) to the new Custom Report Category

12 Assign the new report category (i.e. "Direct Assignment") to a third-party organization by navigating to the **Manage User Access for Custom Categories** tab in sub menu.

Ianage Report Categories	Manage User Access for Custom Categories Manage Restricted Report Access
Manage Report Categ	pories 12
Assign Reports to Cates	ories
ABOUT ASSIGNING REPORTS TO	ATEGORIES
Use this section to assign rep	orts to Report Categories for display in Report Center. Access to reports is provisioned by Report Category, so changing these assignments may affect reports

- **13** To assign a new user, select the newly created Report Category in the **Select a Custom Report Category** dropdown.
- 14 In the **All Active Users** section, search for the user ID that will be used by the third-party organization to access the reports.
- **15** Select the users and move them to the right by clicking the $Add \rightarrow$ button.
- **16** Click the **Save** button to save the changes.

Select a Custom Rep Direct Assignment All Active Users	port Category	Asi	igned to Selected Category		
C04hSook	MhSett) स्पे	Add → ¢ Remove	Search		



Select Category	•		
All Active Users	As	signed to Selected Category	
Satya			
	Add 🗲		
	← Remove		
Save			

17 A confirmation message will appear once the changes have been saved.

18 Success! The third party organization's access is now restricted to only the WLPA reports in the new Custom Report Category.

Once logged in, the seller/servicer should see the new Custom Report Category (e.g. "Direct Assignment") containing the WLPA reports under **Your Categories** in the **Report Center**.

All Reports My Most Used Report	ts Favorites Subscriptions						
Search for a report							
Q Search	Direct Assignment						
Filters	Whole Loan Purchase Advice (Seller Version) - Beta						
Your Categories	This new enhanced report lists the settlement proceeds from the sale of whole loan Servicing Market Place (SMP), as applicable.	mortgages to Fannie Mae includin	g proceed	ds from		Expand	Details
Your Categories	This new enhanced report lists the settlement proceeds from the sale of whole loan Servicing Market Place (SMP), as applicable.	mortgages to Fannie Mae includin	g proceed	ds from		Expand	Details
Your Categories Direct Assignment Unassigned Categories	This new enhanced report lists the settlement proceeds from the sale of whole loan Servicing Market Place (SMP), as applicable.	mortgages to Fannie Mae includin	g proceed	ds from		Expand	Details
Your Categories Direct Assignment Unassigned Categories Underwriting	This new enhanced report lists the settlement proceeds from the sale of whole loan Servicing Market Place (SMP), as applicable. Data refresh Doily	mortgages to Fannie Mae includin \$	g proceed	ds from		Expand	Details
Your Categories Direct Assignment Unassigned Categories Underwriting Pricing & Execution	This new enhanced report lists the settlement proceeds from the sale of whole loan Servicing Market Place (SMP), as applicable. Data refresh Daily Whole Loan Purchase Advice (Seller Version) - Enhanced	mortgages to Fannie Mae includin S	g proceed	ds from	M	Expand	Details