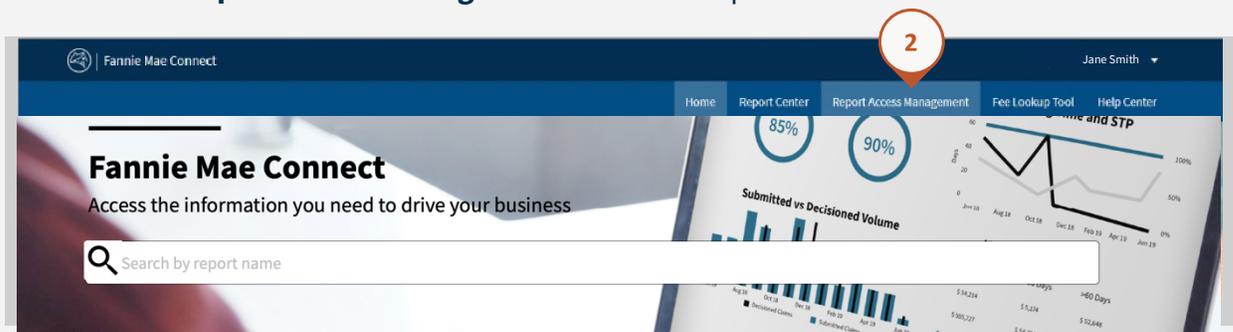


## Creating and managing Custom Report Categories within Fannie Mae Connect

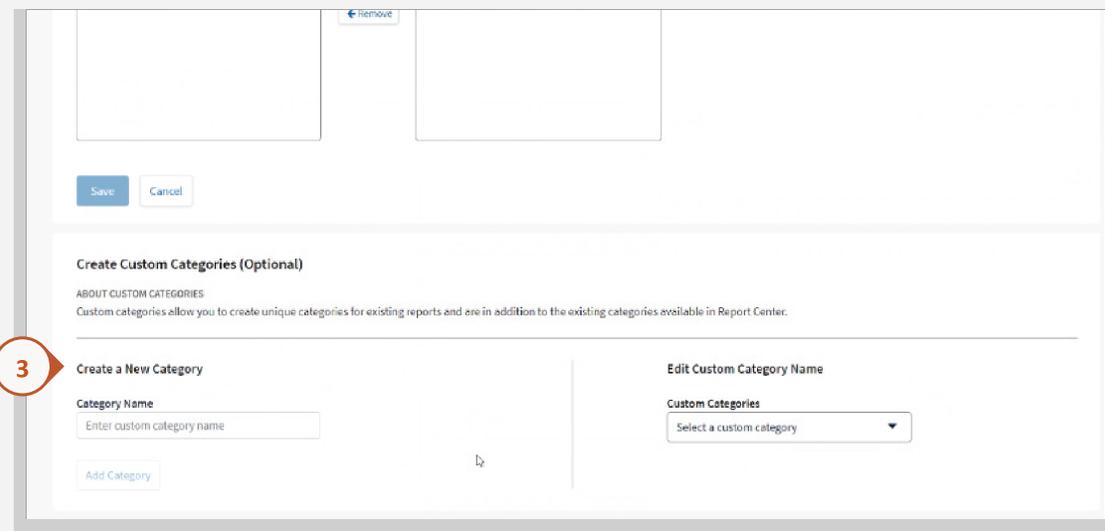
Follow the steps in this document to assign the Whole Loan Purchase Advice (WLPA) reports to a newly created Custom Report Category and grant a third-party organization access to only those reports within Fannie Mae Connect™.

### A. Create a new Custom Report Category

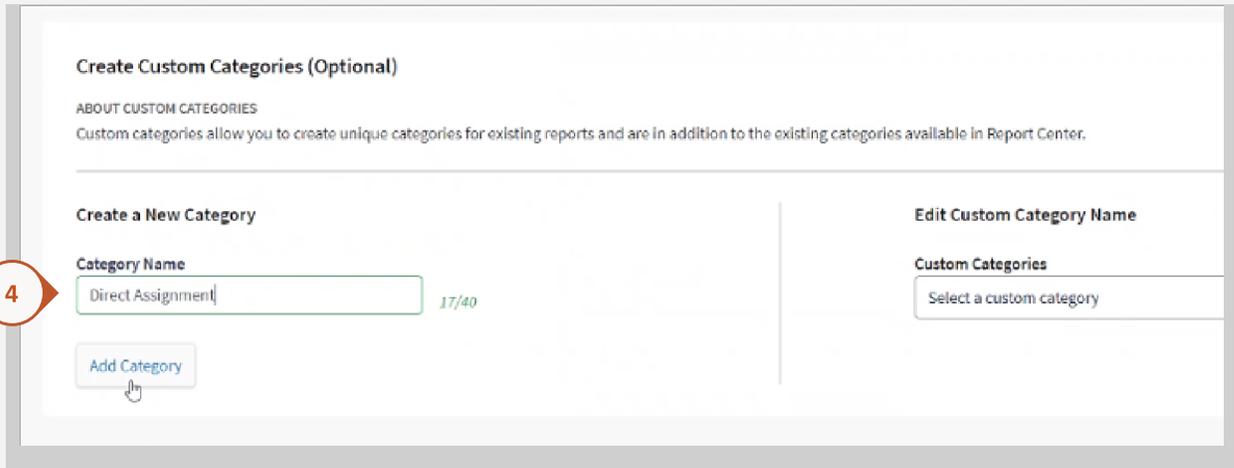
- 1 Login to Fannie Mae Connect as a Report Administrator.
- 2 Click on the **Report Access Management** tab in the top menu.



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



#### 4 Create a name for the new category (e.g. “Direct Assignment”).



**Create Custom Categories (Optional)**

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**

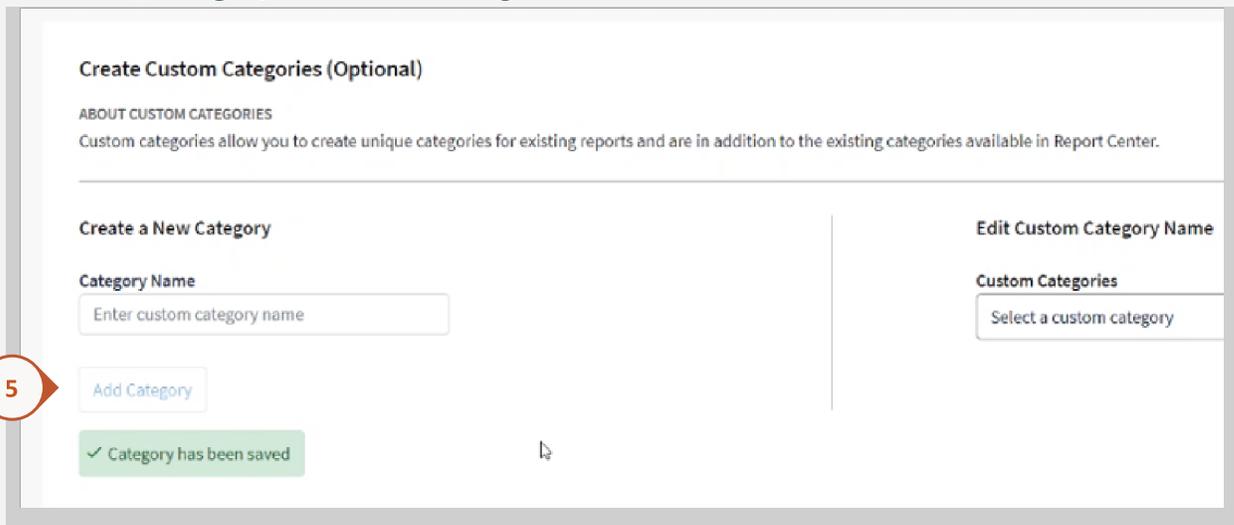
Category Name  
Direct Assignment 17/40

Add Category

**Edit Custom Category Name**

Custom Categories  
Select a custom category

#### 5 Click **Add Category** to save the changes.



**Create Custom Categories (Optional)**

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**

Category Name  
Enter custom category name

Add Category

✓ Category has been saved

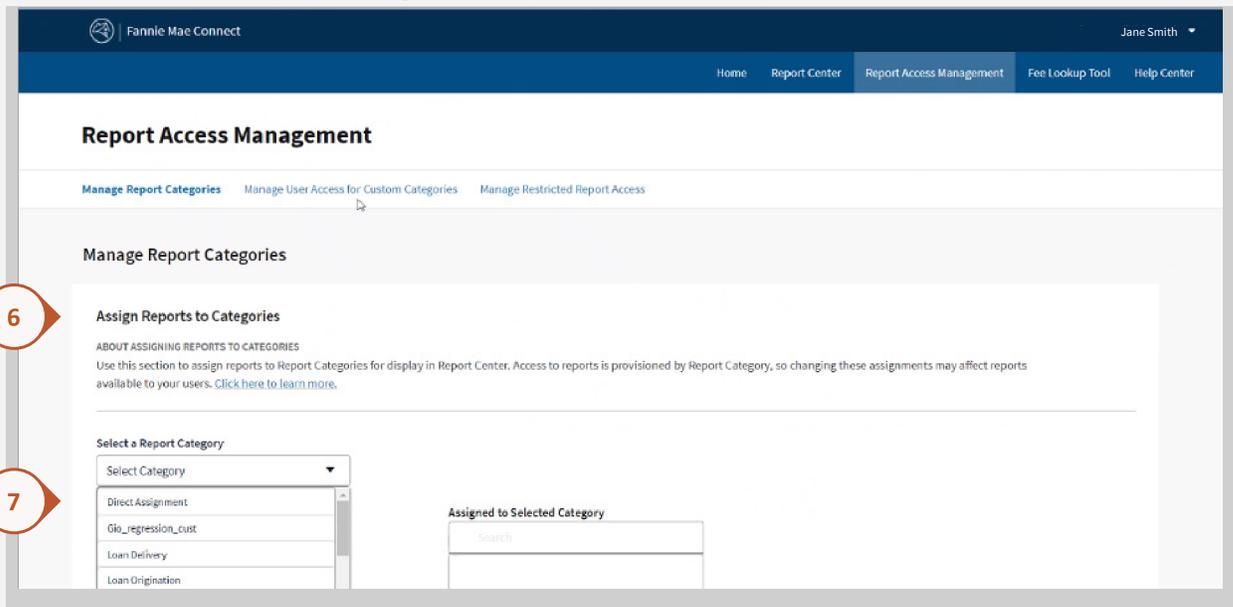
**Edit Custom Category Name**

Custom Categories  
Select a custom category

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

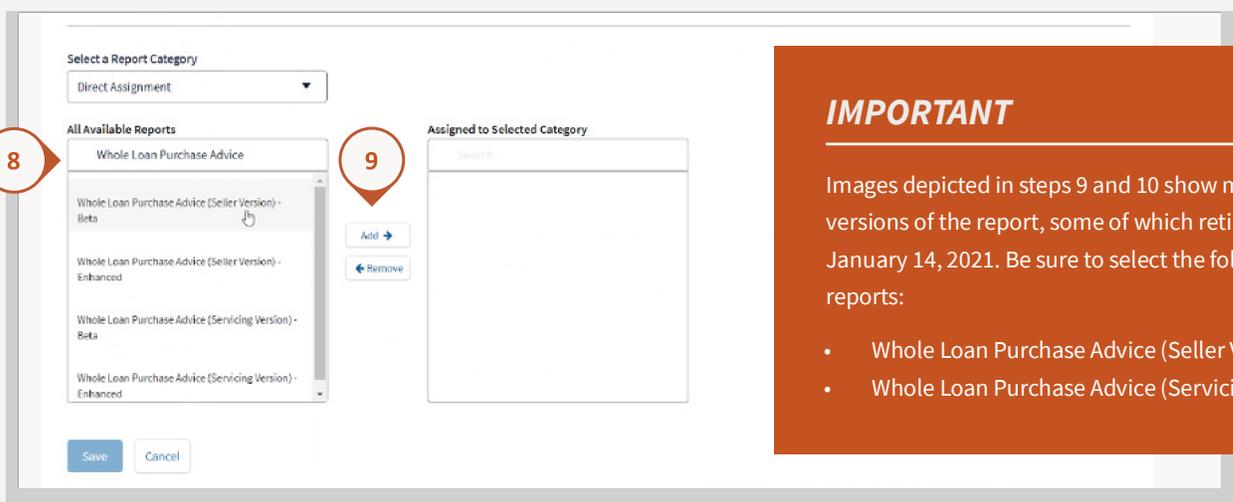
6 Scroll up to the **Assign Reports to Categories** section.

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



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.



### IMPORTANT

Images depicted in steps 9 and 10 show multiple versions of the report, some of which retired on January 14, 2021. Be sure to select the following reports:

- Whole Loan Purchase Advice (Seller Version)
- Whole Loan Purchase Advice (Servicing Version)

10 Click **Save** to save changes after adding the WLPA reports.

**Assign Reports to Categories**

ABOUT ASSIGNING REPORTS TO CATEGORIES  
Use this section to assign reports to Report Categories for display in Report Center. Access to reports is provisioned by Report Category, so changing these assignments may affect reports available to your users. [Click here to learn more.](#)

Select a Report Category  
Direct Assignment

All Available Reports  
Whole Loan Purchase Advice

Assigned to Selected Category  
Search

Whole Loan Purchase Advice (Seller Version) - Beta  
Whole Loan Purchase Advice (Seller Version) - Enhanced  
Whole Loan Purchase Advice (Servicing Version) - Beta  
Whole Loan Purchase Advice (Servicing Version) - Enhanced

Add →  
← Remove

10 Save Cancel

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

Select a Report Category  
Select Category

All Available Reports  
Whole Loan Purchase Advice

Assigned to Selected Category  
Search

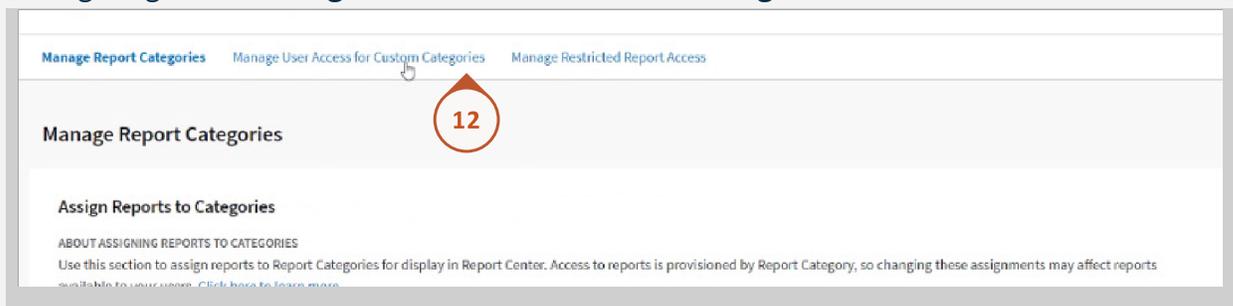
Add →  
← Remove

11 Save Cancel

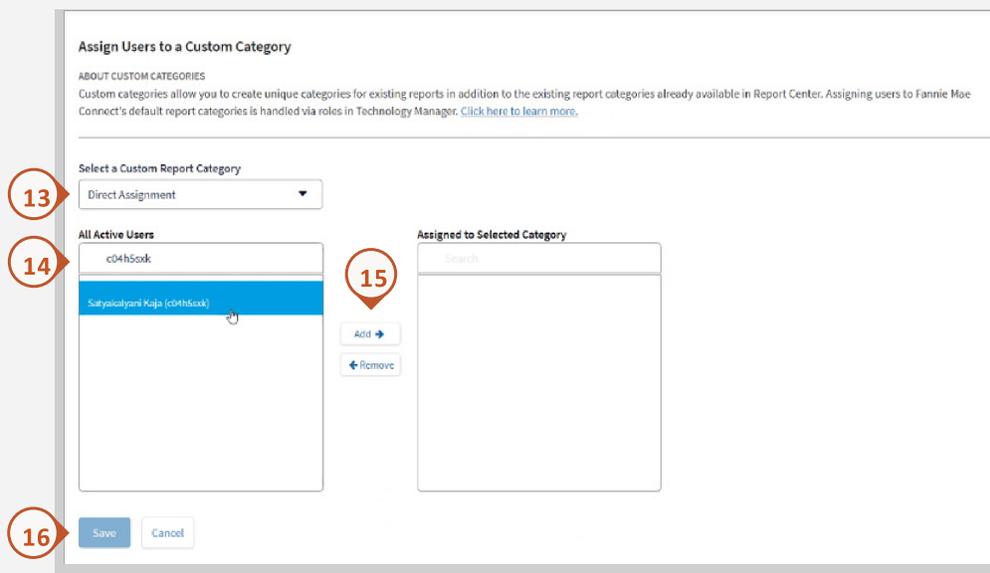
✓ Updates to Direct Assignment have been saved

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

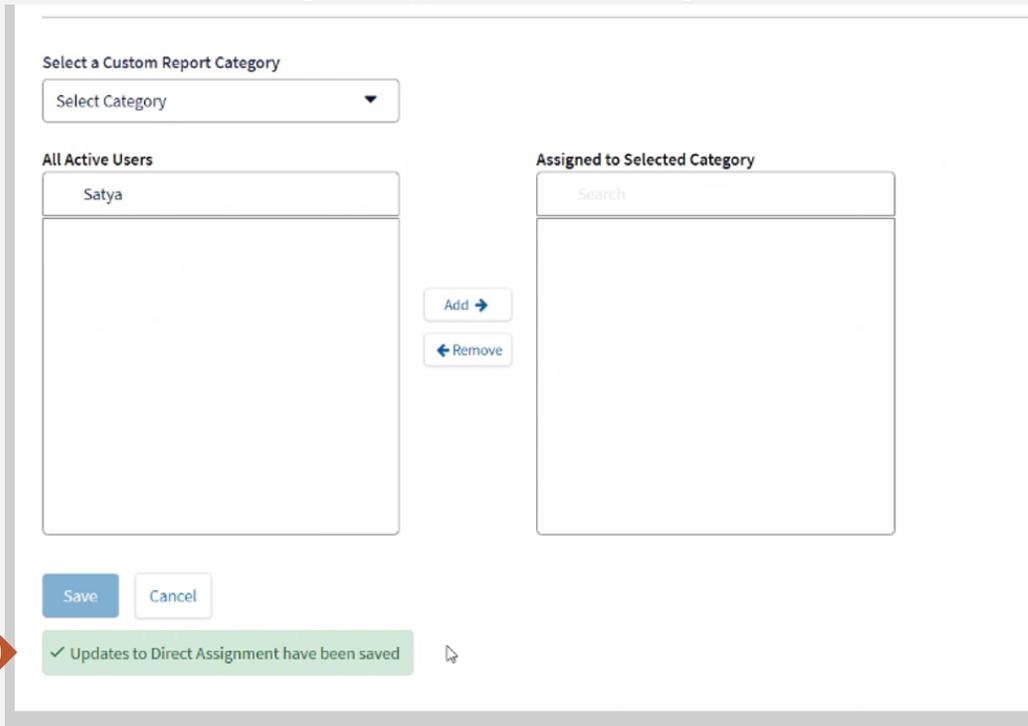
- 12** Assign the new report category (i.e. “Direct Assignment”) to a third-party organization by navigating to the **Manage User Access for Custom Categories** tab in sub menu.



- 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 →** button.
- 16** Click the **Save** button to save the changes.



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 WLPAs 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 WLPAs reports under **Your Categories** in the **Report Center**.

