

November 2016

# **BROKER SELF SERVICE BROKER BRIEFING PACK**

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# Broker Self Service

## At a glance - what's changing?

### You will be able to reset your ANZ Broker Portal password.

You will have the ability to change your expired and reset your forgotten portal passwords via the Broker Portal.

You will also be able to upload multiple documents via Online Document Submission (ODS) within the Broker Portal.

### A better experience

#### **Easy and Convenient!**

- Providing you the ability to change or reset your passwords without the need to request assistance from Broker Enquiries.
- Enable multiple document upload via ODS within the Broker Portal will help speed up your Home Loan submission process.

#### ***As part of a future release in early 2017***

- You will be able to update your own contact details via the Broker Portal.
- Enhanced Reporting enabling you to print and download active/inactive application volumes.

# Broker Self Service

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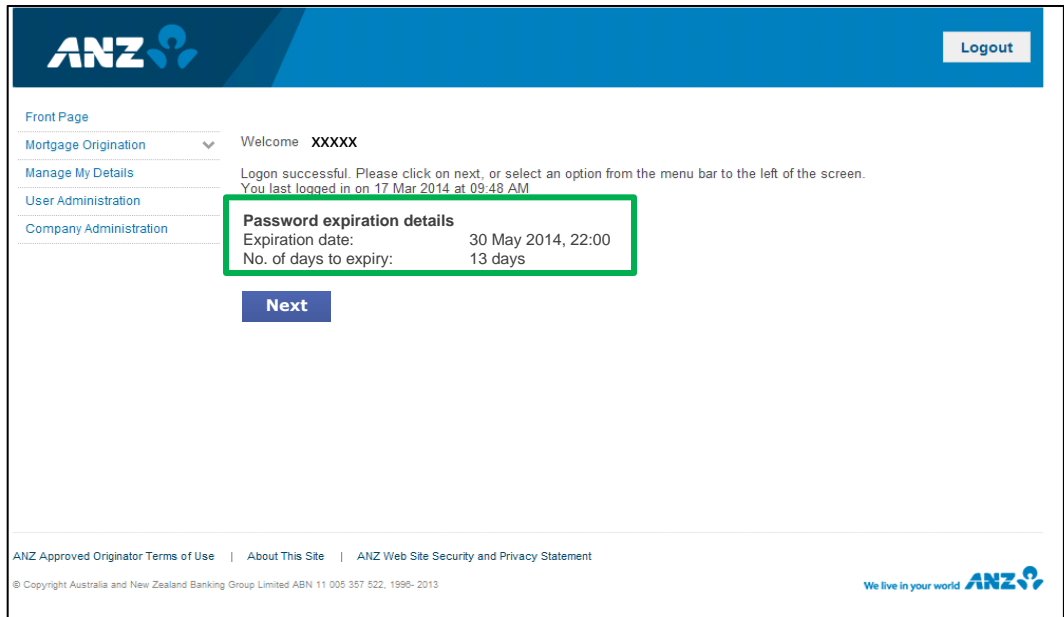
## Benefits

- Increased productivity for you being able to reset your password and not having to call Broker Enquiries.
- Improving the application process for you by enabling you to upload multiple supporting documents in ODS via the Broker Portal.

# Broker Self Service

## Password Change and Reset

When logging on to the Broker Portal your password expiration details will be displayed on the Front Page.



The screenshot displays the ANZ Broker Self Service portal. The header features the ANZ logo and a 'Logout' button. A left-hand menu includes links for 'Front Page', 'Mortgage Origination', 'Manage My Details', 'User Administration', and 'Company Administration'. The main content area shows a 'Welcome' message followed by a login success confirmation and the last login time. A green-bordered box highlights the 'Password expiration details' section, which specifies an expiration date of 30 May 2014, 22:00 and 13 days remaining. A 'Next' button is positioned below this information. The footer contains legal disclaimers and the ANZ slogan 'We live in your world'.

Password expiration details	
Expiration date:	30 May 2014, 22:00
No. of days to expiry:	13 days

**\*Please note screenshots contained in this briefing pack are not the final screen shots and are a mocked up version only**

# Broker Self Service

## Password Change and Reset

The Broker Portal logon screen will have additional instructions for you on how to change an **expired** password, plus a new reset password button.

The screenshot shows the ANZ Broker Website login interface. At the top is the ANZ logo. Below it is a light blue box with the heading "Did you know?" and two lines of text: "You can now change or reset your forgotten password without calling us, simply follow the directions on the screen." and "You can now elect to receive loan documents via email. For more information refer to 'Application Kit/Forms'". Below this is a white box with the heading "Welcome to the ANZ Broker Website". Inside this box are two input fields: "Login ID" and "Password". Below the input fields are two buttons: "Log on" and "Reset password". The "Reset password" button is highlighted with a green border. Below the login box is a block of text providing security information and contact details for password resets.

**ANZ**

**Did you know?**

You can now change or reset your forgotten password without calling us, simply follow the directions on the screen.

You can now elect to receive loan documents via email.  
For more information refer to 'Application Kit/Forms'.

**Welcome to the ANZ Broker Website**

Login ID

Password

**Log on** **Reset password**

The ANZ Broker Distribution website site is a secure site, and requires authentication via a Log On ID and password to access the information and tools provided.

If you are an accredited ANZ Originator but do not have a logon ID and password, please contact us by email at [origserv@anz.com](mailto:origserv@anz.com).

If you have a log on ID for ANZ Originator and require the password to be reset, please contact ANZ on 1800 812 785 (Option 1 & 6) and a Customer Service Officer will assist you.

If you have a logon ID for ANZ Originator but your password has expired, please enter your login ID and password and the system will allow you to enter a new password.

If you have a logon ID for ANZ Originator and require the password to be reset, please enter your login ID and select "Reset Password" or contact ANZ on XXXX

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# Broker Self Service

## Change Expired Password

- When you log on to the portal you will need to enter your current '**expired**' password in the log on screen and select '**Log on**'.
- The 'Change Password' screen will appear and then you will need to enter your current '**expired**' password and then enter your new password twice.
- Your new password must adhere to ANZ password guidelines, the portal will ensure any new password entered meets the guidelines or you will receive an error message to try another password.

ANZ

Logout

### Change password

To change your password please enter in your current password and new password twice below and then press the Change Password button.

Your password:

- > must be between 8 and 15 characters
- > use at least one letter and one number
- > should not be easily identifiable or based on easily accessible personal information (such as family, street names or birth dates).

We recommend using both upper and lower case letters, eg. AuntAlice68.

Current Password:

New Password:

New Password (confirm):

[Change Password](#) [Back](#)

ANZ Approved Originator Terms of Use | [About This Site](#) | [ANZ Web Site Security and Privacy Statement](#)

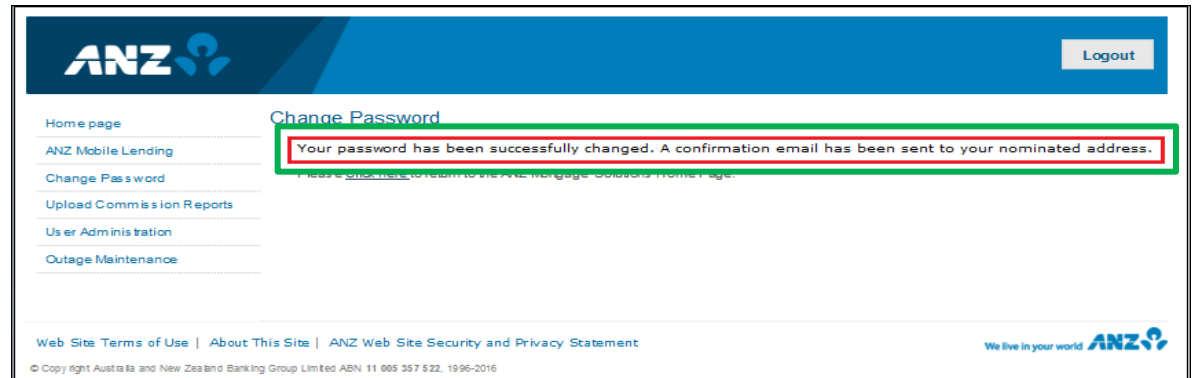
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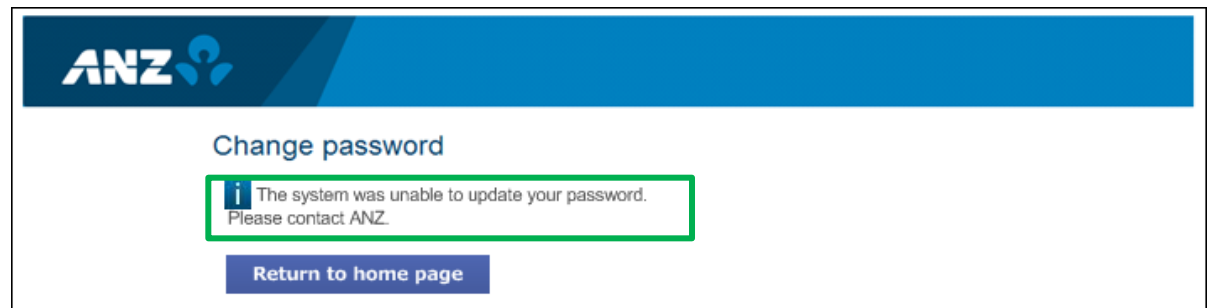
# Broker Self Service

## Change Password

- When a successful password change occurs you will see this message confirming the password change.



- If your password is unable to be updated you will see this message and need to Call Broker Enquiries 1800 812 785.



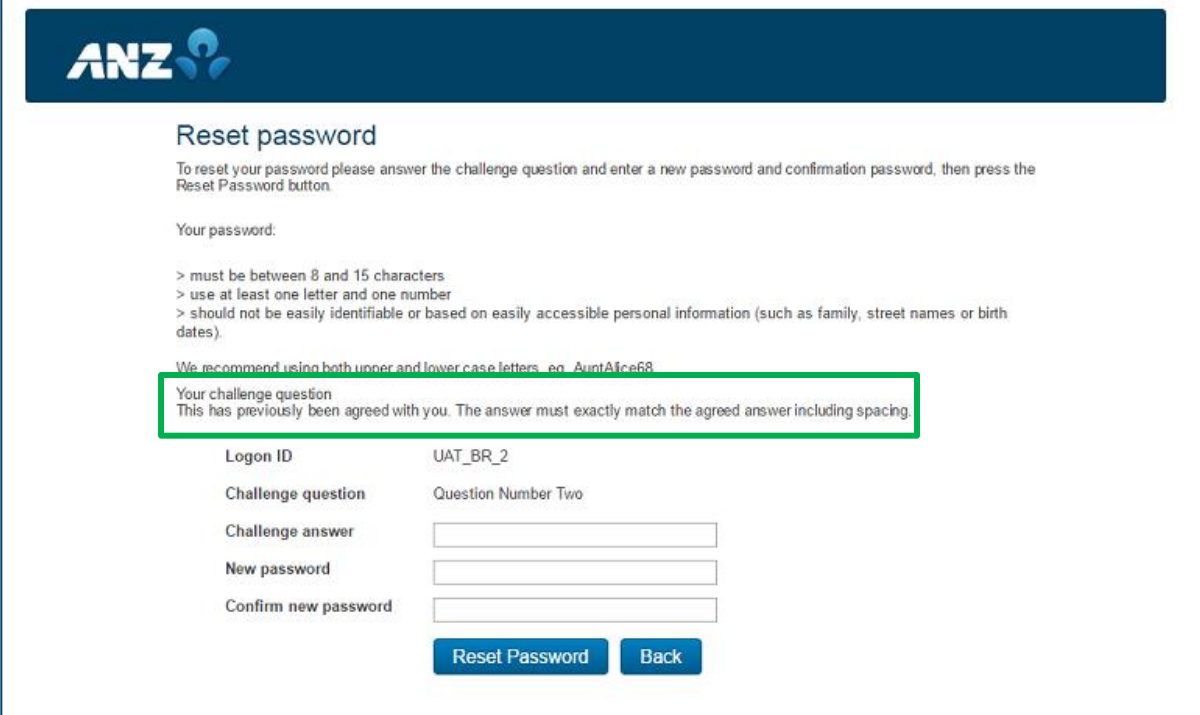
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# Broker Self Service

## Password Reset

- To reset your password you select 'Reset Password' on the log on screen.
- You then need to correctly answer your challenge question.
- Your answer must be entered exactly as it was when created, including upper and lower case characters and spacing.

**NB:** You have 5 attempts to answer the question correctly.



The screenshot shows the ANZ 'Reset password' interface. At the top is the ANZ logo. Below it, the heading 'Reset password' is followed by instructions: 'To reset your password please answer the challenge question and enter a new password and confirmation password, then press the Reset Password button.' A section for 'Your password:' lists requirements: must be between 8 and 15 characters, use at least one letter and one number, and should not be easily identifiable. A recommendation to use both upper and lower case letters is shown with the example 'AuntAlice68'. A green box highlights the 'Your challenge question' section, which states: 'This has previously been agreed with you. The answer must exactly match the agreed answer including spacing.' Below this are input fields for 'Lagon ID' (UAT\_BR\_2), 'Challenge question' (Question Number Two), 'Challenge answer', 'New password', and 'Confirm new password'. At the bottom are 'Reset Password' and 'Back' buttons.

**ANZ**

### Reset password

To reset your password please answer the challenge question and enter a new password and confirmation password, then press the Reset Password button.

Your password:

- > must be between 8 and 15 characters
- > use at least one letter and one number
- > should not be easily identifiable or based on easily accessible personal information (such as family, street names or birth dates).

We recommend using both upper and lower case letters, eg. AuntAlice68

**Your challenge question**  
This has previously been agreed with you. The answer must exactly match the agreed answer including spacing

Lagon ID: UAT\_BR\_2

Challenge question: Question Number Two

Challenge answer:

New password:

Confirm new password:

**Reset Password** **Back**

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# Broker Self Service

## Password Reset

- If you cannot remember the answer to your Challenge question you will need to Call Broker Enquiries 1800 812 785.

### Important!

Broker Enquiries will need to ID you by asking additional security questions; email address registered with ANZ **and** contact mobile number, you have one attempt at each question. Once successfully identified Broker Enquiries can give you the answer to your Challenge question instructing you on how to enter it exactly in the Portal so you will be able to reset your Password. If you have used your 5 attempts Broker Enquiries will need to reset your password.

If Broker Enquiries are unable to identify you they will refer you to your BDM to reset your password. Your BDM will then contact the Mortgage Origination team to have your Challenge Question reset.

**Under no circumstances will the BDM email or text the new password.**

The screenshot shows the ANZ 'Reset password' page. At the top is the ANZ logo. Below it, the heading 'Reset password' is followed by instructions: 'To reset your password please answer the challenge question and enter a new password and confirmation password, then press the Reset Password button.' There are input fields for 'Logon ID', 'Challenge question', 'Challenge answer', 'New password', and 'Confirm new password'. A 'Reset Password' button and a 'Back' button are at the bottom. A green box highlights an error message: 'Authentication failed due to invalid Logon ID or challenge answer. Please contact ANZ and a Customer Service Officer will assist you.' Above this message, there are password requirements: '> must be between 8 and 15 characters', '> use at least one letter and one number', and '> should not be easily identifiable or based on easily accessible personal information (such as family, street names or birth dates)'. A note below these says 'We recommend using both upper and lower case letters, eg. Aa12345678'.

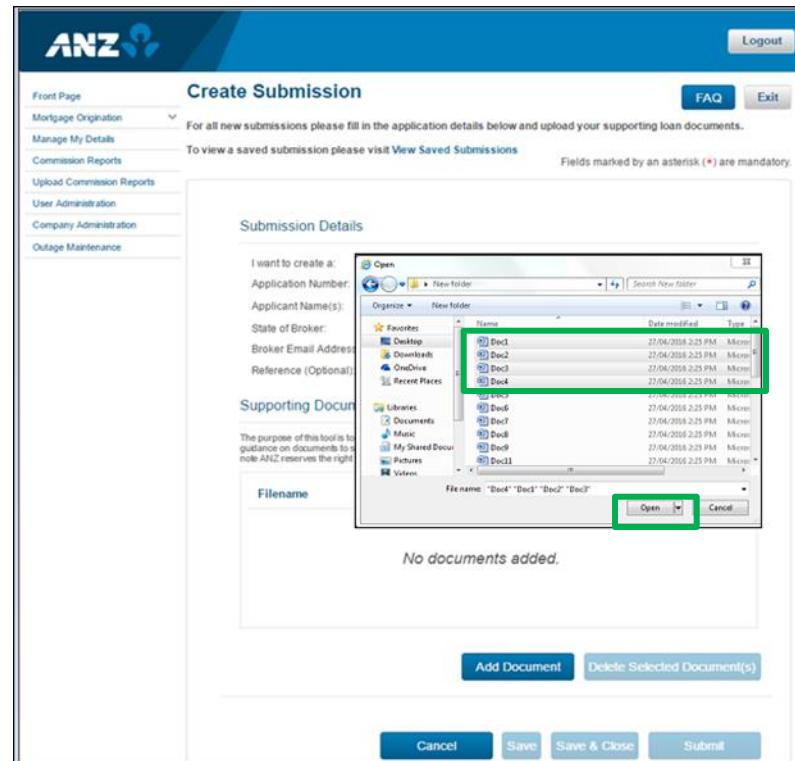
# Broker Self Service

## Multiple document upload

- Improving the application process, you can now upload multiple supporting documents via ODS within the Broker Portal.
- Simply select multiple documents by holding down the 'Ctrl' or 'Command key' button and then select 'Open'.

### TIPS!

- See Appendix 1 for a list of acceptable files for ODS.
- Password protected files are not accepted by ODS.
- If there are any issues with processing the files you will be contacted to resubmit the affected file.



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# Appendix 1

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Below is a list of acceptable files for ODS as well as some tips!

Please ensure you can view your file prior to submitting to prevent delays in processing.

Acceptable files for ODS			
7Z	JPEG	PPTM	XLTM
BMP	JPG	PPTX	XLTX
DOC	MHT	RTF	ZIP
DOCX	MHTML	TAR	
DOT	MSG	TIF	
DOTX	PDF	TIFF	
EML	PNG	TXT	
GIF	POT	XLS	
GZ	PPS	XLSM	
HTM	PPSM	XLSX	
HTML	PPT	XLT	

# Appendix 2 - FAQs

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## **Q1. What happens if the password does not meet the ANZ password guidelines?**

A1. You will receive an error message and will need to enter a new password that complies with ANZ

## **Q2. What happens if I can't remember my Challenge question?**

A2. You have 5 attempts to enter the answer, if you are incorrect on your 5<sup>th</sup> attempt you will receive an error message and you will need to contact Broker Enquiries on 1800 812 785 to change your password.

## **Q3. What if I want to reset my Challenge Question?**

A.3. If Broker Enquiries are unable to identify you they will refer you to your BDM who will then reset your password, the BDM will then contact the Mortgage Origination team to contact you to reset your Challenge question.

## **Q4. Is there any limit on the number of files or file size that can be submitted?**

A4. Online Document Submission supports up to 50 files with a total file size of up to 50MB per submission. If you need to submit more than 50 files or the total file size exceeds 50MB you will need to create more than one submission.

## **Q5. What are the acceptable file types that can be uploaded via Online Document Submission?**

A5. Files with the following file extensions can be uploaded via Online Document Submission:

Acceptable files for ODS			
7Z	JPEG	PPTM	XLTM
BMP	JPG	PPTX	XLTX
DOC	MHT	RTF	ZIP
DOCX	MHTML	TAR	
DOT	MSG	TIF	
DOTX	PDF	TIFF	
EML	PNG	TXT	
GIF	POT	XLS	
GZ	PPS	XLSM	
HTM	PPSM	XLSX	
HTML	PPT	XLT	

## **Q6. How do you upload multiple documents?**

A6. Simply select multiple documents by holding down the 'Ctrl' or 'Command' key' button and then select 'Open'.