

# Introduction

- Unifyty is a complete ERP (Enterprise Resource Planning) SaaS platform, containing features not found in any other ERP. The requirements of Mortgage Lenders differ from other businesses. Unifyty is a very unique product that enforces COBIT principles and improves efficiencies in all segments of the enterprise.
- Unifyty automates and centralizes all daily functions, for all employees, creating a single repository for all company information providing cross-platform business analytics.
- The result of over 17 years of lessons learned on ERP systems in the lending space and over 9,000 hours in design, development and testing. Unifyty provides a level of automation that few in the industry realize was possible.
- Not only will Unifyty help to improve the efficiency of every employee, Unifyty can be an invaluable asset in recruiting new talent.

# Unifyty Structure

Click on a box in the chart to the right or click on a link below to jump to the corresponding screens.

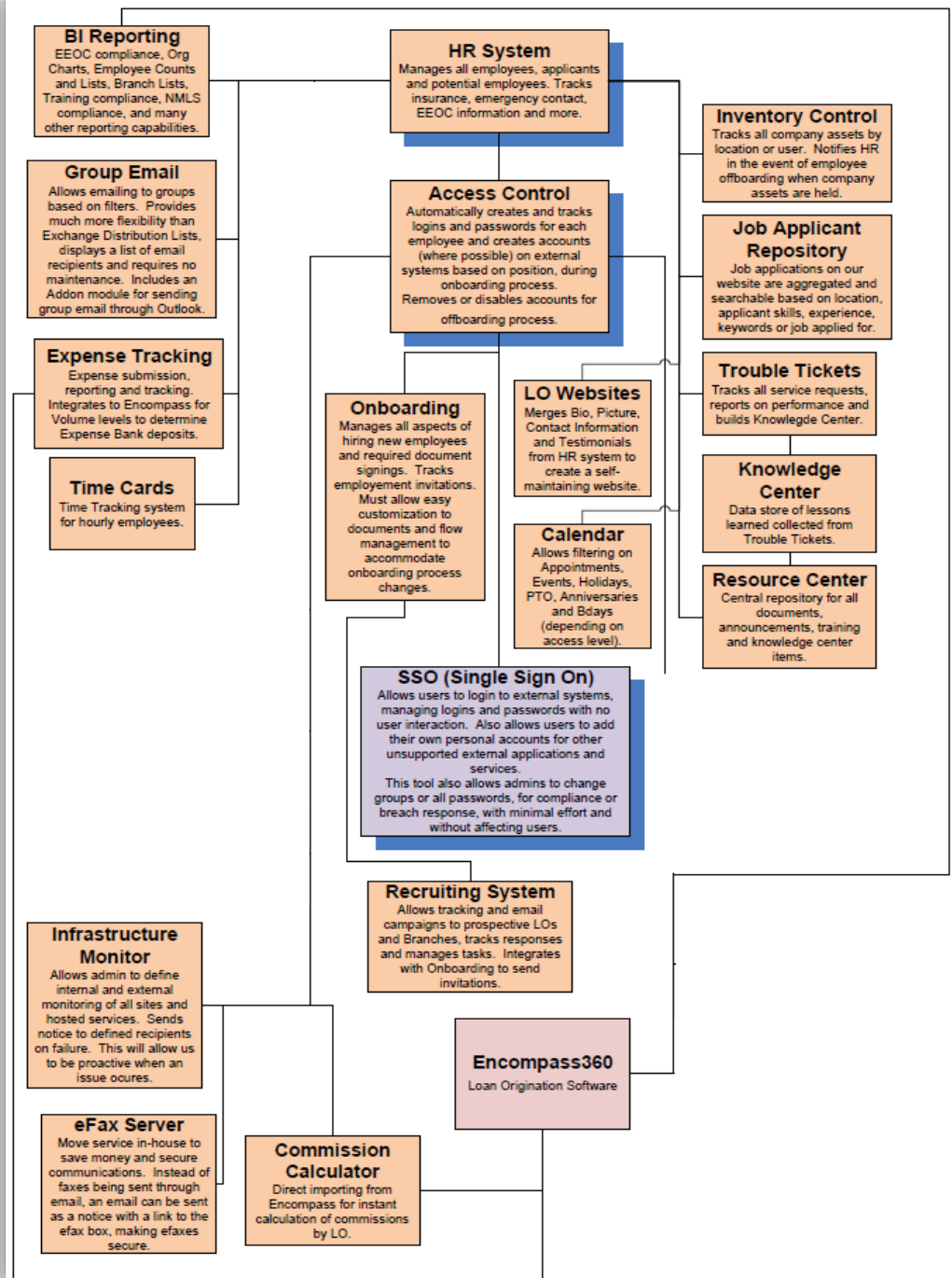
**More** → Indicates more pages are available on this subject. Hit a key to go the next screen.

## Other HR tabs and features:

- [Scorm Compliant LMS \(Learning Management System\)](#)
- [Employee Self Service Portal](#)
- [Benefits Administration](#)
- [Employee Reviews](#)
- [License Tracking](#)

## Other ERP Features and Reports

- [Organizational Charts](#)
- [Vendor Tracking](#)
- [Mobile Version](#)
- [LOS Integration](#)
- [Information Security](#)



# Access Control

Access rights, based on Roles, can be defined for nearly every page in Unifyty.

Page	Open Page	Admin	Applicant	Branch Manager	Candidate	Closing Admin	Compliance Admin	General User	HR Admin	HR User	IT Admin	IT User	QA
AccessControl	AccessControl	Full	None	None	None	None	None	None	Full	None	Full	Full	None
AccessLogs	AccessLogs	Full	None	None	None	None	None	None	None	None	Full	None	None
AddComplianceEvent	AddComplianceEvent	Full	None	None	None	None	Full	None	None	None	Full	None	None
AddInvestor	AddInvestor	Full	None	None	None	None	Full	None	None	None	None	None	None
Admin	Admin	Full	None	None	None	None	Full	None	Full	None	Full	None	None
AdminTimeCard	AdminTimeCard	Full	None	Full	None	None	None	None	None	None	Full	None	None
AdminTimeCardNew	AdminTimeCardNew	Full	None	Full	None	None	Full	None	Full	None	Full	None	None
adminUploads	adminUploads	Full	None	Full	None	None	Full	None	Full	Full	Full	Full	None
Anniversaries	Anniversaries	Full	None	Full	None	None	Full	None	Full	Full	Full	Full	None
ApplicantLogin	ApplicantLogin	Full	Full	None	None	None	None	None	None	None	Full	None	None
applicantPortal	applicantPortal	Full	None	Full	Full	None	None	None	Full	Full	Full	Full	None
AssignTask	AssignTask	Full	None	None	None	None	None	None	Full	Full	Full	Full	None
Birthdays	Birthdays	Full	None	None	None	None	None	None	Full	Full	Full	None	None
Branches	Branches	Full	None	Full	None	None	None	None	Full	Full	Full	Full	None
BranchFunding	BranchFunding	Full	None	Full	None	None	None	None	Full	Full	Full	Full	None
CalendarView	CalendarView	Full	None	Full	None	None	None	None	None	None	None	None	None
CandidatePortal	CandidatePortal	Full	None	Full	Full	None	Full	None	Full	Full	Full	Full	None



# Information Security

Unifyty employs multiple levels of encryption and access control to protect NPI data:

1. Firewall with IPS, UTM and log monitoring.
2. SSN and DoB are not displayed by default.
3. SSN and DoB encrypted on server.
4. SSN and DoB are only available to defined IPs, requests from unregistered IPs are rejected.
5. Access control limits access to NPI.
6. Completed onboarding documents are stored encrypted on server.
7. Logins and passwords for SSO are stored encrypted on the server.
8. PCI compliant passwords are used for logins.
9. Vulnerability scanning is performed monthly and after any major update.
10. Web Application scans run monthly.
11. Web Application Firewall implemented.

