



# DUS Navigate™ August 2020 Job Aid

August 17, 2020



We have added features to enrich the DUS Navigate™ user experience based on lender feedback. The following are improvements to the DUS Navigate application as of August 17, 2020.



# Custom Filters



# Custom Filters

DUS Navigate now includes custom filters for improved search results. You can search for a word or combination of words within one or more **Parts** or **Chapters** of the Guide.

1. Type the term that you want to Search in the Search box:



The screenshot shows the top navigation bar of the Fannie Mae DUS Navigate website. On the left is the Fannie Mae logo, followed by the text 'Fannie Mae' and 'DUS Navigate'. Below this is a search bar with the text 'Search Guide' on the left, a search input field containing 'Multiple Parcels', and a magnifying glass search icon on the right. Below the search bar is a blue button labeled 'Parts / Chapters'.



# Custom Filters

2. Click **Enter** or select the suggested term to see the results. If multiple words are entered without quotation marks, the Search will show results for all terms.

The screenshot shows a search interface with a sidebar on the left and search results on the right. The sidebar, titled "Parts / Chapters", contains a list of filter options with checkboxes: "All" (checked), "Part I : Mortgage Loan", "Part II : Property", "Part III : Products and Features", "Part IV : Committing and Delivery", "Part V : Servicing and Asset Management", "Glossary", and "Related Documents". A "SHOW GUIDE" link is at the bottom of the sidebar. The main content area shows "Showing 1 - 43 out of 43 results" and a "Print/Download Search Results" button. A "100 Results" dropdown menu is visible. The first search result is titled "Part II: Property > Chapter 1: Attributes and Characteristics > Section 102: Multiple Parcels" and includes a "CATEGORY Guide" icon. The second result is "Glossary > N Non-Contiguous Parcels" with an "A Z" icon.



# Custom Filters

3. On the search results page, if you select a specific Part, it will expand to show you all of the Chapters within that Part.

Parts / Chapters

- All
- Part I : Mortgage Loan
  - Overview
  - Mortgage Loan
  - Borrower, Guarantor, Key Principals, and Principals
- Part II : Property
- Part III : Products and Features
- Part IV : Committing and Delivery
- Part V : Servicing and Asset Management
- Glossary
- Related Documents

< SHOW GUIDE



# Custom Filters

4. Based on your search term (typed in Step #1), you can:

- Select **one** or **multiple Chapters** within **the same Part**; and/or
- Select **one** or **multiple Chapters** within **another Part**.

5. If you only select the **Part**, all Chapters within that Part will automatically be searched.

Parts / Chapters

- All
- Part I : Mortgage Loan
  - Overview
  - Mortgage Loan
  - Borrower, Guarantor, Key Principals, and Principals
- Part II : Property
- Part III : Products and Features
- Part IV : Committing and Delivery
- Part V : Servicing and Asset Management
  - General Servicing Requirements, and Servicing for Loan Documents and Specialty Products
  - Reporting and Remitting
  - Custodial Account Requirements
  - Asset Management: Loan Document Administration
  - Surveillance

< SHOW GUIDE



# Custom Filters

6. After selecting the Parts and Chapters, scroll down to the Advanced Search filters:

## Advanced Search

- Includes any of these words (OR)
- Includes all of these words (AND)
- Excludes all of these words (NOT)

APPLY FILTERS



# Custom Filters

**NOTE:** Select one of the radio buttons to refine your search. For example, if you enter the words Multiple Parcel and:

- Select "Includes any of these words (OR)", the results will display all pages that contain either the word Multiple or the word Parcel.
  - Example: "Multiple" **OR** "Parcel" (**Logical OR**)
- Select "Includes all of these words (AND)", the results will display all pages that contain both the word Multiple and the word Parcel.
  - Example: Multiple" **AND** "Parcel" (**Logical AND**)
- Select "Excludes all of these words (NOT)", the results will display all pages that contain neither the word Multiple nor the word Parcel.
  - Example: **NOT** "Multiple" **NOT** "Parcel" (**Logical NOT**).

**See example on next page**



# Custom Filters

## Advanced Search

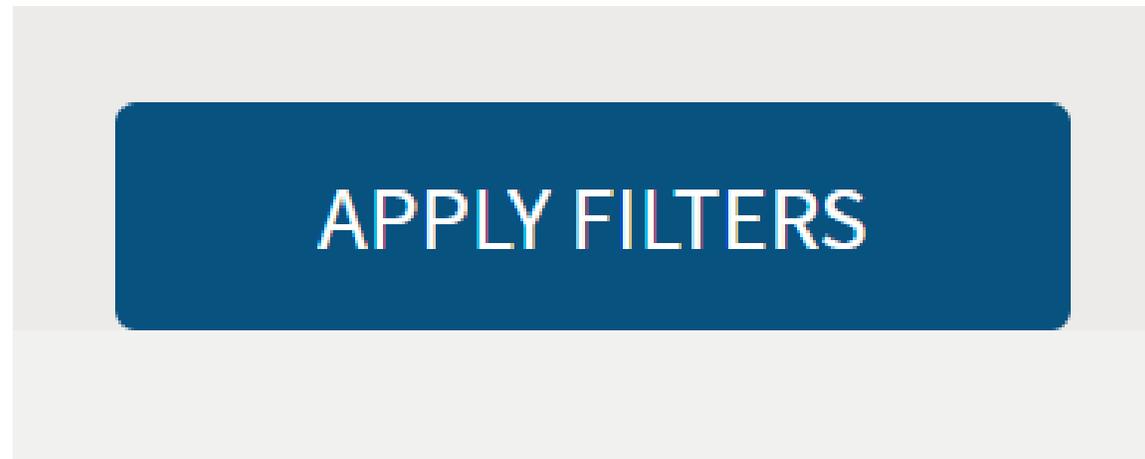
- Includes any of these words (OR)
- Includes all of these words (AND)
- Excludes all of these words (NOT)

APPLY FILTERS



# Custom Filters

7. After making your selections, select the "**Apply Filters**" button to view the search results based on your chosen criteria.

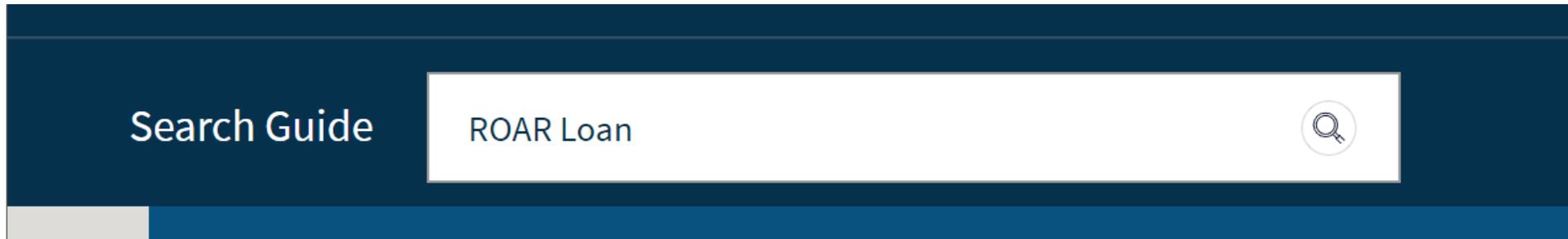


**Note:** To search for the same term within different parts and chapters than initially selected, simply check/uncheck the relevant Parts/Chapters and select "**Apply Filters**" again to see additional search results.



# Custom Filters

8. To search for a different term, type a new term in the search box, and Select **Enter**.

A screenshot of a search interface. On the left, the text "Search Guide" is displayed in white on a dark blue background. To its right is a white search input box containing the text "ROAR Loan". A magnifying glass icon is positioned at the end of the search box. The entire search bar is set against a dark blue background.

# Custom Filters

9. Once the search results appear, you can select additional filters and select the “**Apply Filters**” button.



APPLY FILTERS





# “Favorite” Forms and Glossary Terms

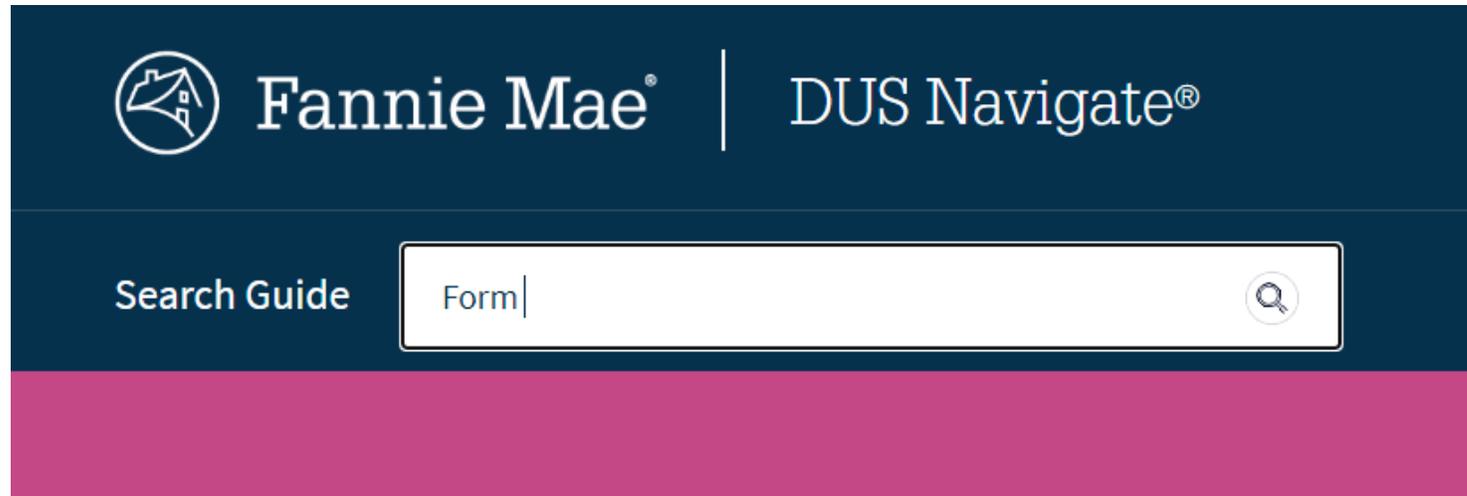


# “Favorite” Forms and Glossary Terms

DUS Navigate also provides you with the ability to “favorite” Forms and Glossary Terms from the search results page to reduce the need to continuously search for frequently used forms and terms.

## To save a form:

1. Type the “Form Number” or “Form” in the Search box:



The screenshot shows the top navigation bar of the Fannie Mae DUS Navigate website. On the left is the Fannie Mae logo, followed by the text 'Fannie Mae' and 'DUS Navigate'. Below this is a search bar containing the text 'Form' and a magnifying glass icon. To the left of the search bar is the text 'Search Guide'.



# “Favorite” Forms and Glossary Terms

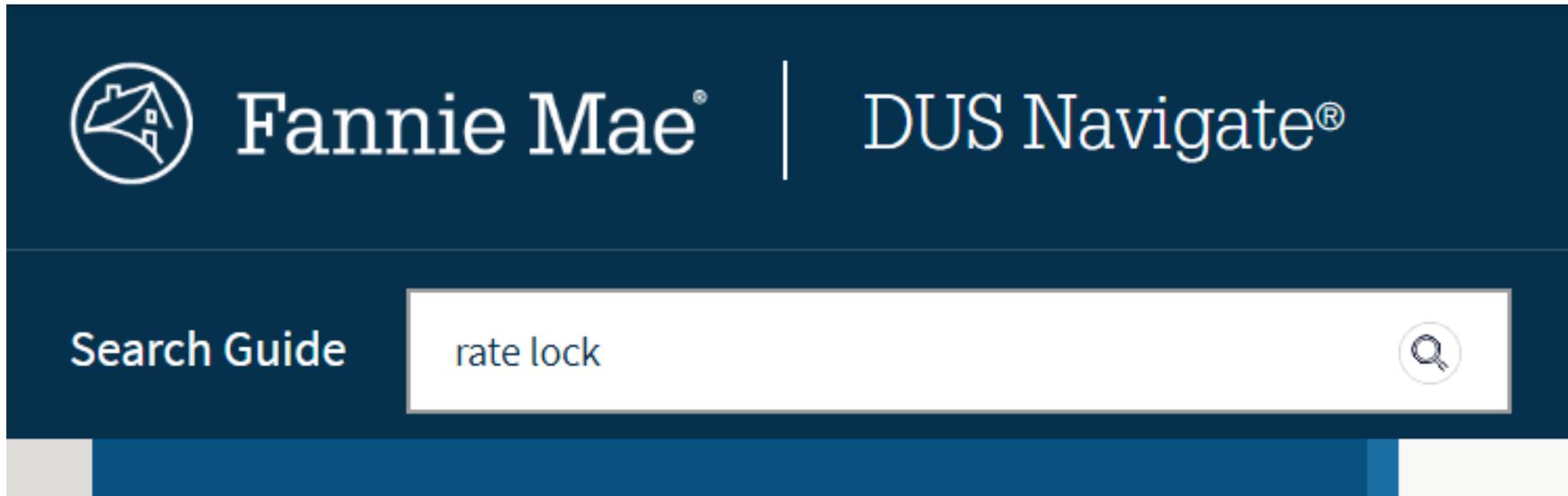
2. Select the favorite icon from the search result to save the selected form:



# “Favorite” Forms and Glossary Terms

## To save a Glossary Term:

1. Type the Glossary Term in the Search box

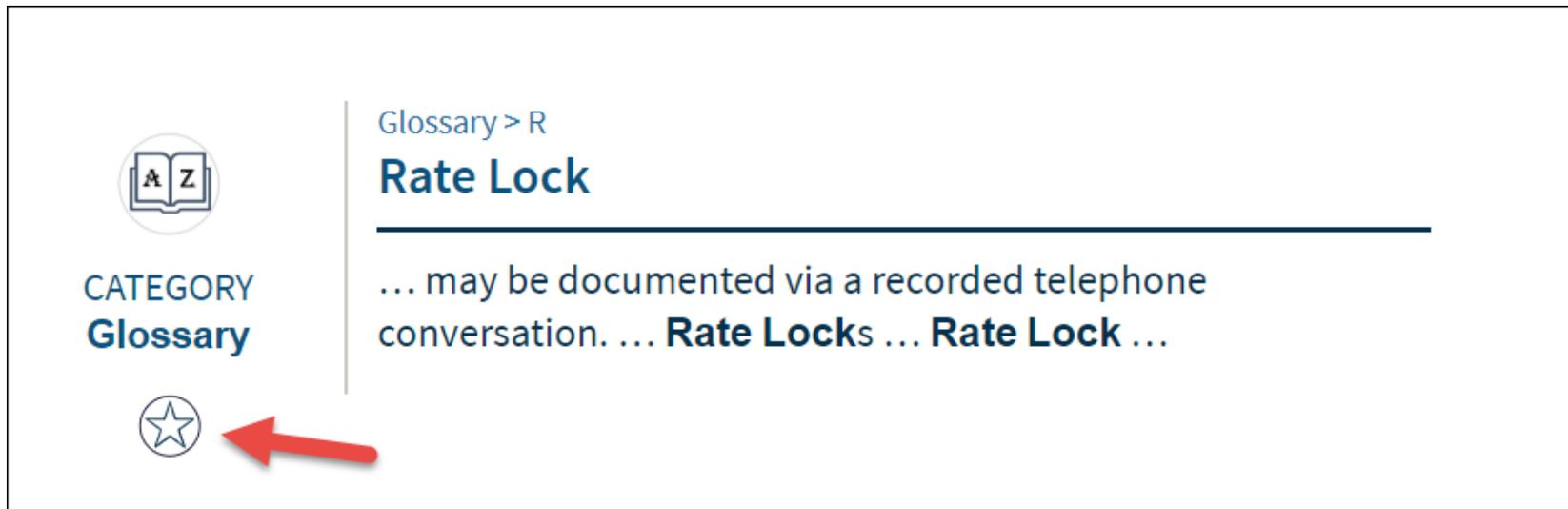


The screenshot shows the top navigation bar of the Fannie Mae DUS Navigate website. On the left is the Fannie Mae logo, followed by the text 'Fannie Mae' and 'DUS Navigate'. Below the logo is a 'Search Guide' link. A search box is positioned to the right of the 'Search Guide' link, containing the text 'rate lock' and a magnifying glass icon.



# “Favorite” Forms and Glossary Terms

2. You can select the favorite icon from the search result to save the selected term:



The screenshot shows a search result for the term "Rate Lock" within a glossary. On the left side, there is a category icon of an open book with "A Z" inside, labeled "CATEGORY Glossary". Below this is a star icon, which is highlighted by a red arrow pointing to it from the right. To the right of the star icon, the text "Glossary > R" is displayed above the term "Rate Lock". A horizontal line separates the term from the description below, which reads "... may be documented via a recorded telephone conversation. ... Rate Locks ... Rate Lock ...".



# “Favorite” Forms and Glossary Terms

3. You can also open the Glossary Term and select the favorite icon from term definition page:



## Rate Lock

Agreement between the *Lender* and the *Investor* containing the terms of the *Lender-Arranged Sale* or *Multifamily Trading Desk* trade of the *Mortgage Loan* and the *MBS* terms and conditions relating to the underlying *MBS*, if applicable, which may be documented via a recorded telephone conversation.

**Synonyms**                      **Rate Locks**





# My Profile Customization



# My Profile Customization

We have also enhanced the My Profile section (accessed after log-in). Content is separated into categories such as: Guide Pages, Glossary Terms, Forms & Related Docs, Last 10 Searches, and Search Preferences.

The list is based on your frequently searched terms, search preferences, and selected/bookmarked favorites within the Guide.

The screenshot displays two side-by-side panels from a user's profile customization interface. The left panel, titled 'My Favorite - Guide Pages', contains a list of five items: 'Alternative Assumptions', 'Catastrophic Risk Insurance', 'Co-Tenant Borrowers', 'Evidence of Insurance', and 'Generally'. At the bottom of this panel, it shows 'Page 1' and a 'Next >>' button. The right panel, titled 'My Favorite - Glossary Terms', contains one item: 'Qualified Occupant'. Both panels have a light gray header and a vertical scrollbar on the right side.



# My Profile Customization

My Favorite - Forms & Related Docs ▲

Form 4631

My Last 10 Searches

form

rate lock

2014

Insurance Carrier Rating

Evidence of Insurance

Page 1   Next 5 Searches »



# My Profile Customization

## My Search Preferences

Default search results per page 20 Results ▾

SAVE

## My Profile\*

**Subscriber Name:** Fanniemae

\*Lender Users- Please contact your Technology Manager to update this information.





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