**INFO-ACCESS**

**Events Training Worksheet**



## ADDING/EDITING

* Add an event with a frequency of once via the Events menu located at the Entity, Loan, or Deposit level of the left navigation panel.
* Add an event with a frequency of more than once via the Events menu located at the Entity, Loan, or Deposit level of the left navigation panel.
* Add an event from the Events Menu of a Collateral or Guaranty Details Menu.
* Edit event information by editing the data within the event rows.

## VIEWING INCOMPLETE EVENTS

* View events via the My Work Items section located within the Work Queues menu.
* View events from all users from the Events Query in the Work Queues Menu (if you have permissions to manage events for others).

## COMPLETING EVENTS

* Work the event by reviewing the event information using either the Event Owner or Event Title hyperlink.
* Return to the Work Queue menu to complete the event.
  + Select the green “Mark Work Item Complete” icon.
  + Add resolution comments and save.

## VIEWING COMPLETED EVENTS

* Navigate to a record with a completed event to view the completed date and comments.
* Access the “Completed Work Items” pop up box from the events menu to view all completed events information.

## RELATED MATERIALS

* INFO-ACCESS Administrator Guide
* INFO-ACCESS User Guide
* Training Video: Events