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