INFO-ACCESS

Loan Configuration Training Worksheet

GETTING STARTED

WHAT'S YOUR GROUP?

To get started with this training, determine which group you fall within.

- Your institution may configure loans *before* the loan is booked to the core and downloaded into INFO-ACCESS. If so, you are in the pre-host group for this training.
- Your institution may configure loans *after* the loan has been booked to the core and downloaded into INFO-ACCESS. If so, you are in the post host group for this training.

TERMINOLOGY

- [ ] Review and understand the difference between auto-configure and manual configuration.

SETTING UP THE LOAN

PRE-HOST GROUP

- [ ] Create or navigate to your new entity.
- [ ] Create your new loan record.
- [ ] Add all borrowers and guarantors to the Roles menu.

PRE-HOST & POST HOST GROUP

- [ ] Assign the borrower and guarantor types to each entity listed in the **Roles** menu.
- [ ] Add or update all collateral records in the **Collateral** menu.
- [ ] Add the guaranty records in the **Guaranty** menu.

CONFIGURING REQUIREMENTS

PRE-HOST & POST HOST GROUP

- [ ] Review and understand the difference between Configure-All and Configure Individual.
- [ ] Choose Configure All
    - Required vs Default Requirements
    - Configure requirements for each section in the left-side menu:
        - Loan
        - Entities
        - Collateral
        - Guaranty
    - Add requirement descriptions (if necessary)
    - Waive certain requirements (if needed)
    - Set the requirement dates.
    - Select barcode cover pages to print
    - Order the barcode cover page print order.
    - Choose documents for barcode cover page only printing.
    - Set/Finish the requirement configuration.
    - Review the configuration in the Requirements work window.
- [ ] Choose Configure Individual

- If existing requirements already appear, review and understand what caused them to appear.
- Configure requirements for each section in the left-side menu:
  - Loan
  - Entities
  - Collateral
  - Guaranty
- Add requirement descriptions (if necessary)
- Set the requirement dates.
- Set/Finish the requirement configuration.
- Review the configuration in the Requirements work window.

CONFIGURATION STATUSES

- [ ] Review configuration statuses
  - [ ] Unconfigured
  - [ ] In Progress
  - [ ] Auto-Configured
  - [ ] Configured
  - [ ] Partially Configured

BARCODE COVER PAGES

- [ ] Add bar code cover pages to account document package.
- [ ] Scan, import, or upload the account package.

VIEWING & REPORTING EXCEPTIONS

- [ ] Review requirement statuses for exception tracking
- [ ] Exceptions appear in **Work Queues** and on **Reports**

MISCELLANEOUS

- [ ] Where and why does a released collateral icon appear?
- [ ] What does the shortcut "Add Required and Default Tracking" do?
  - Access the "Show All Requirement Types" to see non-required/non-default requirement types.
- [ ] Explore the "Print Barcode Only" tool in the configure windows.

RELATED MATERIALS

- INFO-ACCESS Administrator Guide
- INFO-ACCESS User Guide
- Quick Reference: Configuration Status Logic
- Quick Reference: How to Communicate & Report Invalidation Reasons
- Quick Reference: Understanding Requirement Dates
- Training Video: Loan Configuration