**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