**INFO-ACCESS**

**Notes Training Worksheet**



## ADDING

* Add a note to an entity, contact, loan, deposit, collateral, guaranty, document, and/or a requirement using the “Add Note” icon located in the header toolbar.
* Add a note through the Notes Menu located in the left navigation panel.
* Add a note via the Notes Menu located on the Requirement, Document, Collateral or Guaranty Detail View.

## VIEWING

* View Notes via the Notes Menu located in the left navigation panel.
  + Use a filter to drill down to a note category.
  + Turn on the reading pane within the Notes Menu to view/read the full note.
  + Use grid functions to toggle and sort or drag and group note information.
  + Use the print icon to print a note summary.
  + Use the print note report icon to print a full report of all notes.

## SEARCHING

* From the search menu, perform a search for notes by Note Type.
* From the search menu, perform a search for notes by the specific Note Body Text.

## EDITING

* Within a note using the edit icon to edit a previously saved note (if your permissions allow).
* Delete a note using the delete note icon to remove a previously saved note (if your permissions allow).

## RELATED MATERIALS

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