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