**INFO-ACCESS**

**Requirement Training Worksheet**



## TERMINOLOGY

* Requirements vs. Exceptions

## VIEW REQUIREMENTS

* Navigate to the requirement menu of an entity, loan, deposit, collateral, or guaranty.
* View the requirement associations tab.
* View the “Best Document” of a requirement using the magnifying glass icon.
* Rearranged the data columns to put the following columns in this order:
  + Active Date, Expire Data, Exception Date, Expect Date
  + Review the Active, Expire, and Exception Dates of a requirement.
* Review the Expect and Exception Dates of a pending requirement.
* Change the requirement filter setting to “Requirement Status”.
  + Evaluate the difference. If desired, make the change in User Settings.
* Review the Requirement Details Window of a specific requirement.
  + Review the requirement associations.
  + Review the historical requirement documents.

## REQUIREMENT STATUSES

* Review the Requirement Status Worksheet

## REPORTING EXCEPTIONS

* Query and view exceptions using Work Queues.
  + Search for exceptions.
  + Save a custom exception query.
* View an Exception Report
  + Discuss published, archived, and scheduled reports.

## CLEARING EXCEPTIONS

* Query and view exceptions using Work Queues.
* Clear an exception by adding a document to a requirement from Work Queues.

## RELATED MATERIALS

* INFO-ACCESS Administrator Guide
* INFO-ACCESS User Guide
* Quick Reference: Importing Documents & Satisfying Requirements
* Quick Reference: Understanding Requirement Dates
* Training Video: Requirements