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