INFO-ACCESS

Release Notes

Version 6.0 – 6.1.22046.2

PROFORMANCE
The Information Access Company

CONTENTS

Version 6.0 and Later

Versions 6.0 and later contain all existing enhancements and bug fixes from INFO-ACCESS Versions 5.7. For reference to those items, consult the user guide, administrator guide, or 5.7 release notes.

Upgraded Development Tools

Versions 6.0 and later include updates to all development tools, including GD Picture, SQL, Codesmith, etc.

INFO-ACCESS General Business

Versions 6.0 and later contain infrastructure for INFO-ACCESS General Business. General Business is a separate INFO-ACCESS solution that specifically serves departments like Human Resources, Vendor Management, and other similar groups, keeping institution-level business documents apart from customer documents. Please contact PROFORMANCE for additional information and pricing.

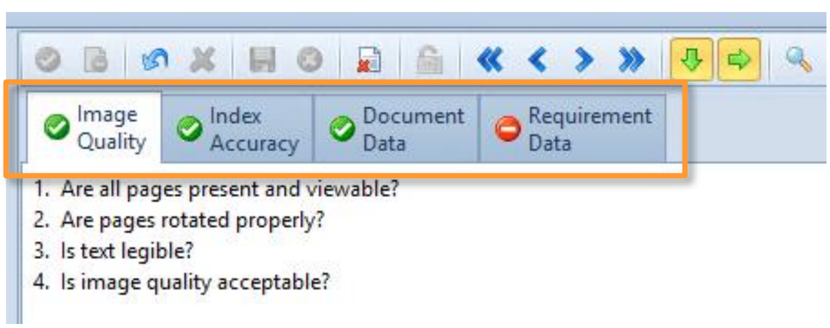
Version 6.1.20189.1

Enhancements

Review Queue Enhancements

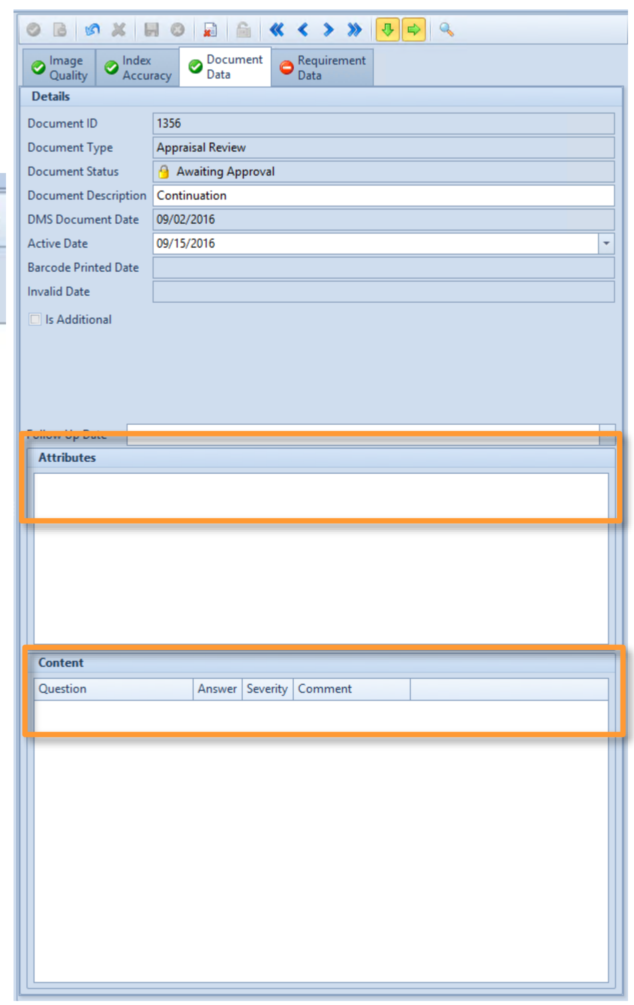
Work Task Tab Layout

Improved the layout of the review queue by arranging the review queue task tabs horizontally across the top of the review queue work window. (below)



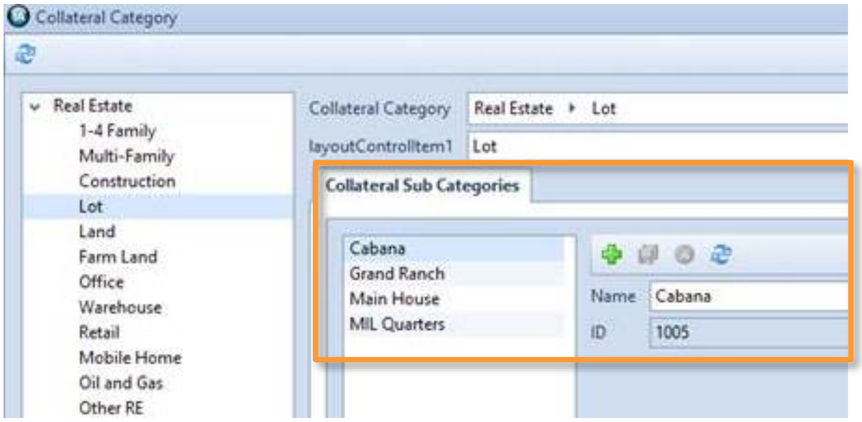
Attributes & Content Questions Location

Consolidated the *Attributes* and *Contents* sections under the *Document Data* tab, allowing all three sections to appear on one work tab. (right)

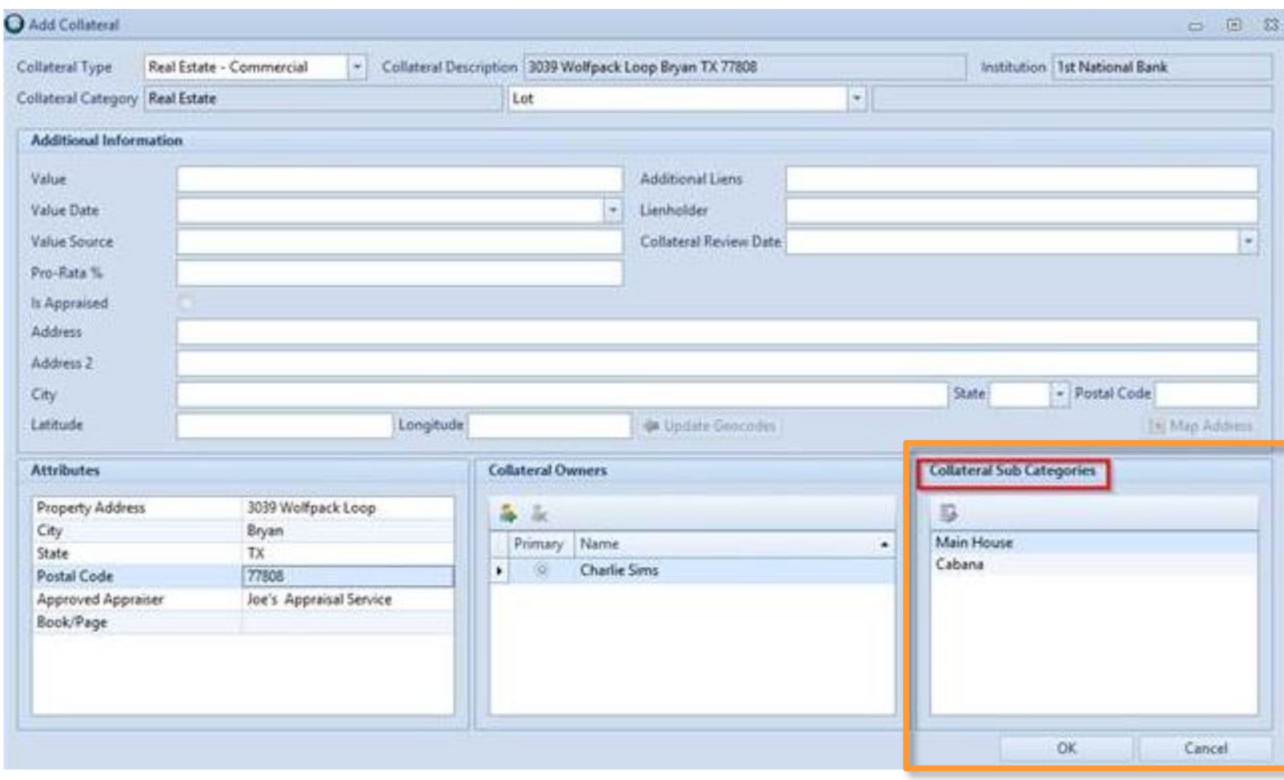


Collateral Sub-Categories

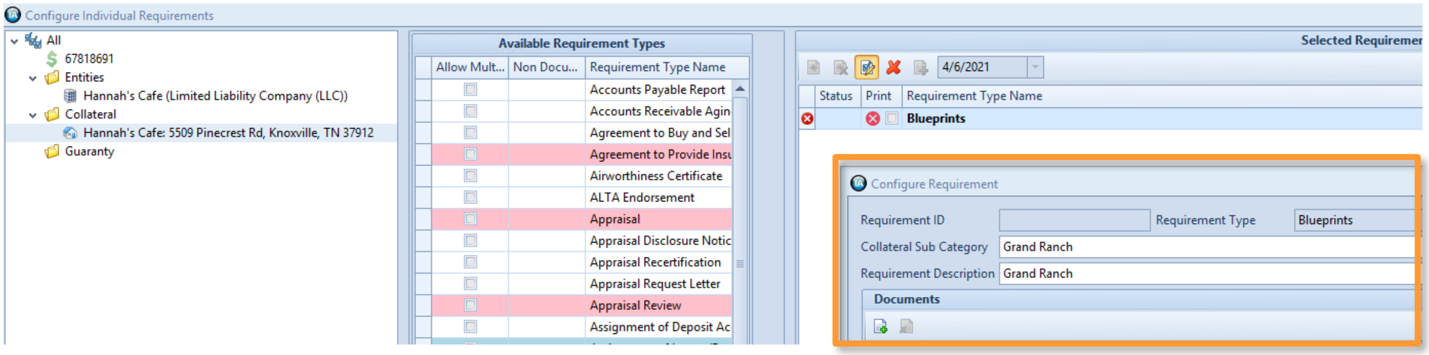
Added a *Collateral Category* administration menu to allow administrators to define customer collateral sub-categories for tracking and reporting.



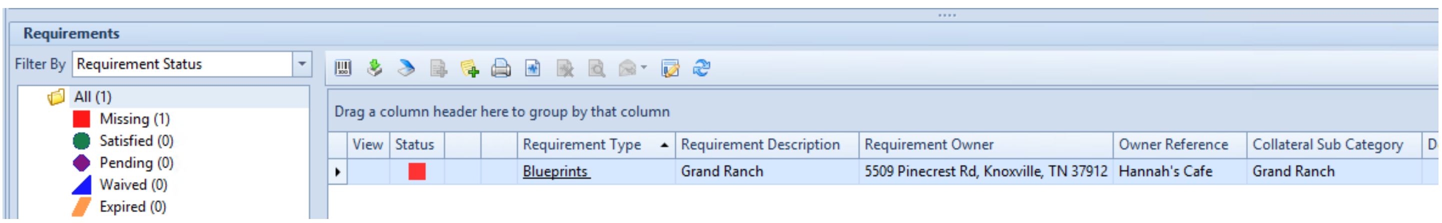
When adding new collateral to a loan, a collateral sub-category can be selected from the *Add Collateral* dialogue menu. The sub-category selection box will only display if sub-categories have been assigned to that specific collateral category. The *Add Collateral* dialogue menu is shown below.



Collateral sub-categories can be associated with requirements that are designated as *Allow Multiples.*



Finally, collateral sub-categories appear within the requirement grid for informational purposes.



Version 6.1.21125.2

INFO-ACCESS

Enhancements

Document Viewer

Upgraded the document viewer to the latest version.

Treasury Management

Installed Treasury Management requirement tracking capabilities.

Bugs

Review Queue Search Button

Corrected an issue where the search button for Review Queues was disabled when Branches and/or Officers had no selections chosen.

Reindexing with Required Keywords (for OnBase)

Corrected an issue in INFO-ACCESS related to OnBase as the DMS where reindexing a document would not save keywords marked as “required” in OnBase when reindexing the document in OnBase, causing issues viewing the document in INFO-ACCESS due to the missing keyword.

Is Additional

Corrected an issue where the “Is Additional” permission was only applied to the Documents Grid. The permission has been expanded to include the Import Document Screen as well as being available in the Document Details Menu.

Reindexing from Prohibited Document Types

Corrected an issue where a user received a message that stated, "You do not have rights to import this document type" when the user was reindexing *from* a document type that they did not have permissions to index *to* as defined in the Security Group Administration Document Type Tab.

INFO-ACCESS for General Business

Enhancements

Work Items/Work Queues

Implemented department work items and work queues.

Contacts

Made various improvements to the ability to add, view, and manage contacts.

Version 6.1.21237.1

INFO-ACCESS

Enhancements

INFO-SHARE

Added the primary phone contact to the INFO-SHARE available fields. Added a warning message box for when a requirement has been previously requested.

Notice Work Item Filtering

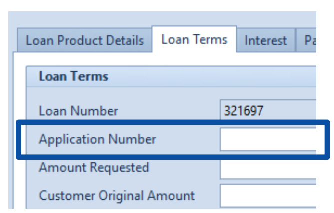
When filtering work item notices by loans, made performance improvements to reduce the results time from 3-5 seconds to <1 second.

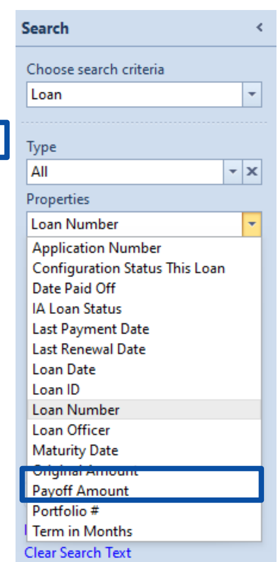
Roles/Collateral/Guaranty Load Times

Made performance enhancements to improve the load time of the Roles/Collateral/Guaranty screen when a loan record has many (50+) collateral records associated with the loan.

Search Properties

Added the deposit ID field as a search property. Added the application number as a new field for loans in the Data|Loan Terms tab. This field can be provided via host file loading or entered manually. Also added the application number as a search property.





LTV and LTC Reporting

Added the calculated fields for Total Collateral Value, Combined LTV, and LTC Ratios available fields in INFO-REPORTS. The fields are available for reporting in the Loan|Loans report template.

Collateral Data Fields

Converted collateral attributes to standard collateral data fields.

Bugs

Other Documents

Corrected an issue that prevented users from searching by the document date attribute when searching for a single day.

Total Collateral Value, Combined LTV, and LTC Ratios

Corrected an issue where the values presented on the initial load were for the top record in the master view grid, not the select loan, and corresponding values were only returned after refreshing.

Importing Audio Files

Corrected an issue where importing audio files via INFO-ACCESS when using another document management system as storage did not allow the audio files to play back.

Desktop Scanning Error

Corrected an issue where a blank image would be saved when a user scanned a document into INFO-ACCESS via a desktop scanner and then selected "Cancel" rather than "Save" during the process.

INFO-ACCESS for General Business

Enhancements

INFO-SHARE

Implemented INFO-SHARE for Department Entities.

Document Splitter

Enabled the document splitter for users with department documents.

Group Queries

Implemented the group query feature for departments, including all department entity, account, and contact fields.

Version 6.1.21263.2

INFO-ACCESS & INFO-ACCESS for General Business

Enhancements

Group Queries

- Improved messaging in the administration menu that appeared when saving without rules, layout, or user selections.
- When exporting to Excel, set the sheet name to match the query name.
- Added group naming and pages to exported reports.

INFO-ACCESS

Enhancements

Document Splitter

Improved how the document splitter handles documents when an error occurs during the split allowing the document splitter process to cancel the split rather than shut down, allowing the user to correct the issue and split again.

Rules Engine Service

Made various improvements to the rules engine service that runs Review Queue processing to improve error logging, to recycle the service nightly to improve performance, and to allow the service to restart automatically if a server error caused an interruption.

Bugs

Review Queue

Fixed an issue with the date "After" and data "Days Before Today" rules to force them to ignore the time stamp associated with a document so that review queue results were returned accurately.

Entity Administration Menu

Corrected a problem where the Entity Administration menu did not appear in the Administration drop-down.

Version 6.1.21298.1

INFO-ACCESS

Enhancements

SSRS Reports

Added two new reports available via SSRS reports: Review Queue Deposit Work Items and Review Queue Loan Work Items.

Review Queue

Added CIF as a field in the Review Queue Layout tab.

Bugs

Adding Document Notes in the Requirement Details Grid

Corrected an issue where users received an error when adding notes to a document from within the Requirement Details view in the Documents Grid.

User Settings

Resolved an issue where user settings would not save as expected.

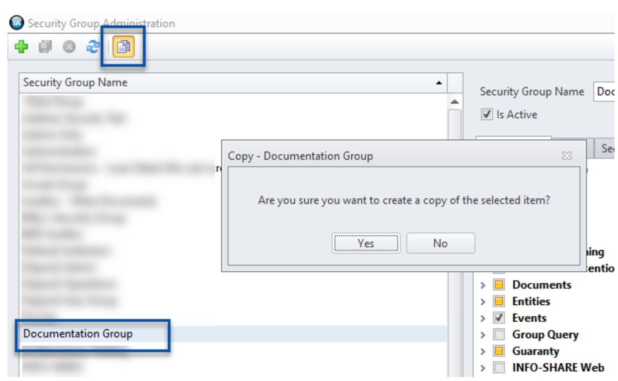
Version 6.1.21323.2

INFO-ACCESS

Enhancements

Copy Security Groups

Add the ability to copy an existing security group in the Security Group Administration menu when administrators are working to set up new groups. Select an existing security group, and then use the new copy button.



Review Queue Properties

Added CIF and Entity Name as property fields available as rules for Review Queues where the Owner Type and Review Function are both set to "Document."

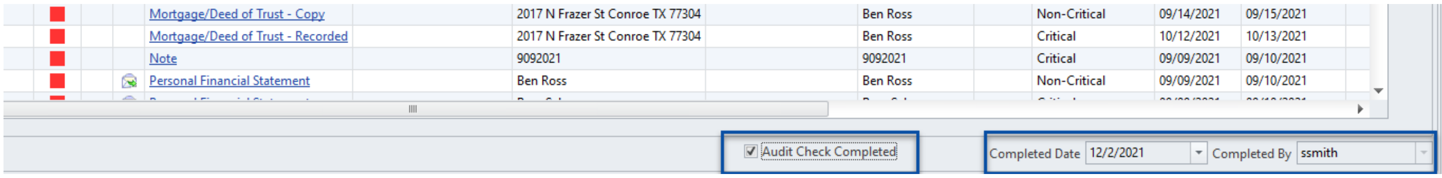
Non-Documents and Allow Multiples during Auto-Configuration

Added the ability to add Non-Document Requirements and Requirements set to allow multiples through auto-configuration. Previously, auto-configure could not add non-document or requirements set to allow multiples through auto-configuration. Application Settings must be enabled to use this feature—contact support or your account manager for setup.

Audit Check Completed By

Added a field to collect who completed the audit check on the loan and deposit requirement grid. Previous fields included Audit Check Completed and Completed Date only. When a user selects the "Audit Check Completed" box, then the system will automatically populate the name of the user who completed the audit check.

This field is now available on the following INFO-REPORTS: Deposits, Deposits – New Accounts Today, Deposits Not Found on Host, Loans, Loans Not Found on Host.



Bugs

Document Splitter

Fixed an issue with the document splitter tool where splitting large files would result in an "out of memory" error.

Event Comments in the Event Grid

Corrected an issue where users could not update event comments in the event grid.

Configuration Data Drop-Downs

Corrected a layout issue where the date fields did not appear side by side in the deposit and loan configuration menus.

Version 6.1.21341.1

INFO-ACCESS General Business

Bugs

Department ID on Notes

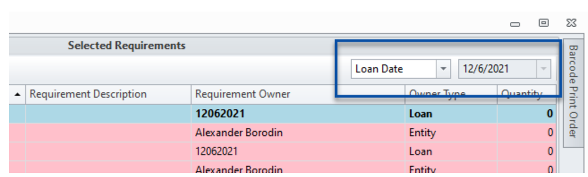
Corrected an issue where the department ID was not being added to the note view window.

INFO-ACCESS

Bugs

Configuration Menu Data Layout Fields

Corrected an issue where the date drop-down and the date selector fields did not appear side-by-side within the Configuration work windows.



Other Documents

For the Other Documents module of INFO-ACCESS designed to store and manage documents not associated with a standard entity, loan, deposit, collateral, guaranty, or treasury management record, corrected a search error that was present if the user set up a document Attribute that contained a question mark in the name, like "HMDA Reportable?". Question marks, and other punctuation, may now be used in Attributes for Other Documents, and no errors will be presented when conducting an advanced search on this attribute type.

Deposit Account Officer Merge Fields for Notifications and Notices

Corrected a problem where Deposit Account Officer merge fields did not print on Notices and Notifications.

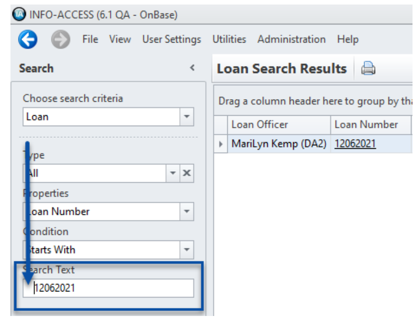
Distinct Loan Requirements Report

Corrected an issue where the following fields on the Distinct Loan Requirements Report were blank: Document Content Question, Document Content Question Answer, and Document Content Comments.

Enhancements

Search Functionality

Improved the search functionality that ignores leading and/or trailing spaces that appear in the Search Value. (See Image Right)

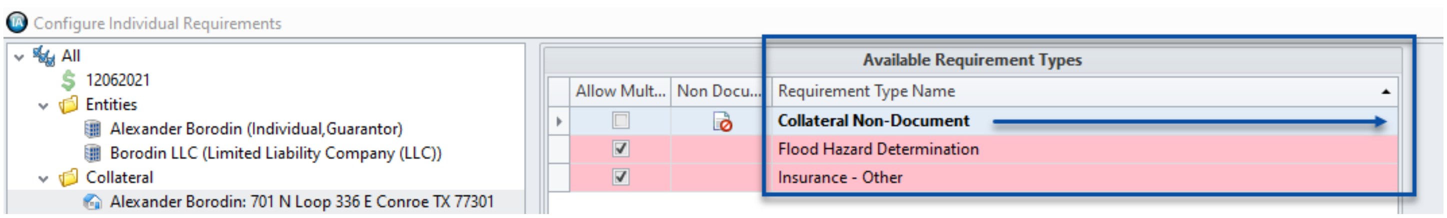


Requirement ID Search

Updated the search functionality so that when a user searches by a Requirement ID number, selecting the hyperlink for that Requirement ID will take the user to the Requirement Details screen, rather than the full Requirement Menu where requirements are shown in a list. This change mirrors the functionality when searching for a Document ID number, and selecting the hyperlink takes the user to the Document Details screen.

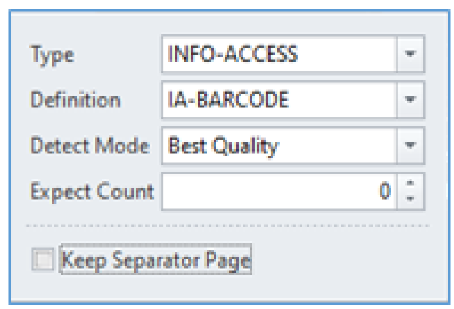
Available Requirements Column in Configuration Menus

Updated the "Available Requirement Types" menu sizing to allow the Requirement Type Name field to fill the column width and expanded the default width of the Available Requirement Types column to allow users to see longer Requirement Type listings without having to manually fix the column width.

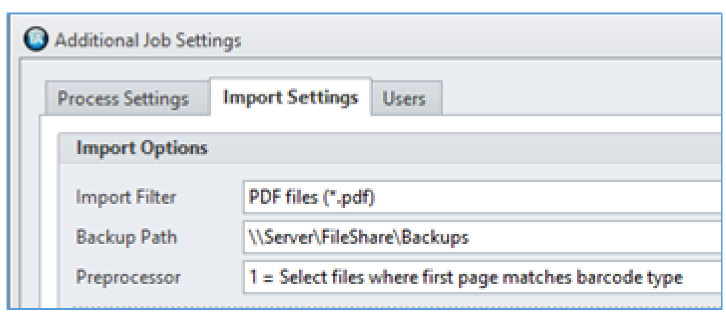


MODULE | Document Capture Solution

Added a new module to the Capture functionality of INFO-ACCESS. Document Capture Solution is a pre-processing tool that filters and ingests documents into INFO-ACCESS based on defined rules. For example, Document Capture Solution can identify documents with INFO-ACCESS barcode cover sheets in a shared folder location that also contains documents with LaserPro barcodes or documents with no barcodes at all. Users can set up separate Capture Jobs to ingest all INFO-ACCESS barcode cover sheet jobs from the folder, all LaserPro barcoded documents from the folder, and/or all documents without barcodes. These capture jobs can be run on-demand or scheduled.



When imported, the ingestion source (LaserPro barcode, INFO-ACCESS barcode cover sheet, no barcode, etc.) is captured. It can be used as rules and layout fields within Review Queue, allowing users to review documents by document type through Review Queue.



More information can be obtained from your account manager by contacting pfsales@pf-inc.com, or on our website.

Version 6.1.21357.1

INFO-ACCESS

Bugs

Rejecting Documents in a Review Queue

Corrected a bug introduced in an earlier 6.1 version where rejecting a document (for invalidation purposes) inside the Review Queue forced the user to reject the document on each of the four work item tabs before the document was removed from the Review Queue. Now, rejecting a document from any work item tab clears all remaining work item tabs and completes the review of that document.

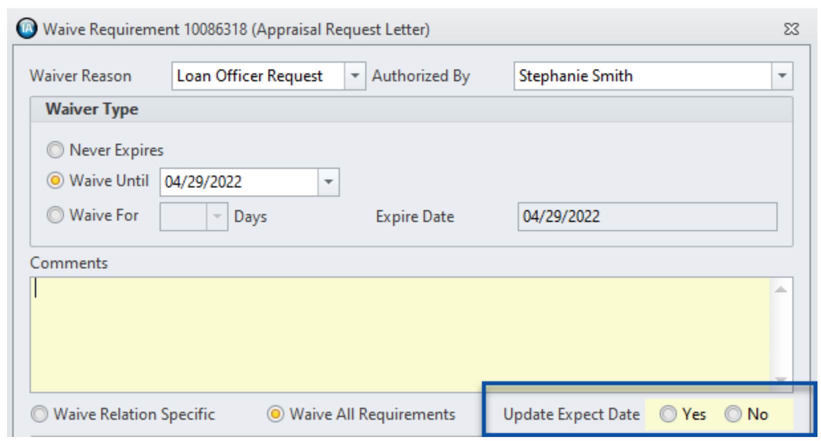
Version 6.1.22046.2

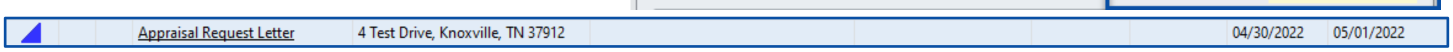
INFO-ACCESS

Bugs

Update Expect Date when using Waive Until or Waive For

Added an option that allows users to "Update [the] Expect Date" when waiving a requirement using the "Waive Until" or the "Waive For" options. Choosing "Yes" updates the "Expect Date" of the requirement accordingly. The effect of this option is only relevant to requirements with a "Missing" Status in order to roll the "Exception Date" forward, preventing multiple notices from generating and preventing the exception date from rolling back when the waiver expires.





Note:

- All other requirement type statuses calculate using the expiration date of the document in file. See: Quick Reference Guide | Understanding Requirement Dates
- This is not a default setting, this optional setting must be turned on by PROFORMANCE.

Deal Assistant Document Viewer Freezing

The Document Viewer would freeze when users would open documents with the viewer outside of the Deal Assistant and then attempt to open additional documents in a second, active Document Viewer session from within Deal Assistant. Added a notification message to inform users that the original Document Viewer opened would close when the user attempted to open a second Document Viewer from the Deal Assistant window eliminating the system freeze.

INFO-REPORTS

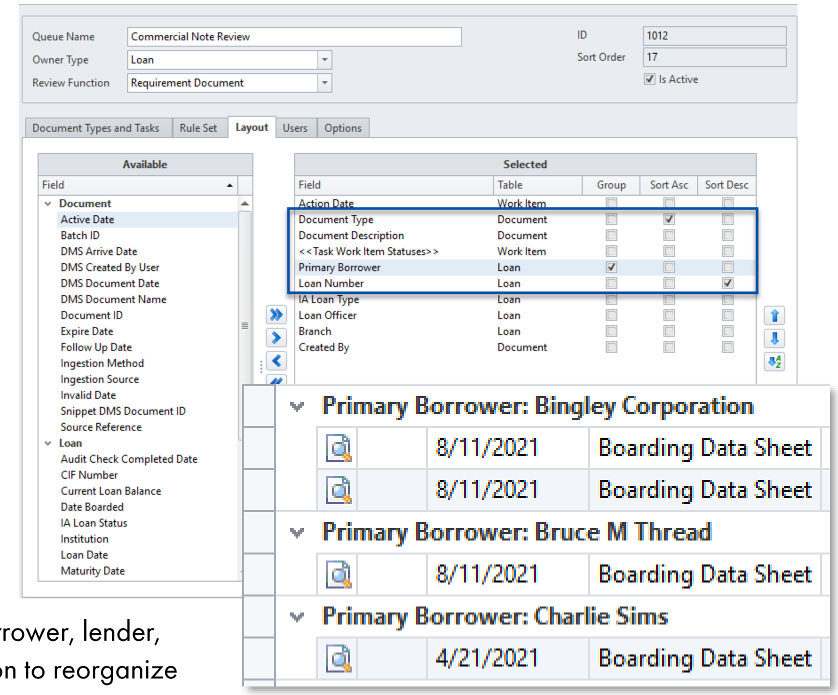
- Corrected an issue where "Deals in Process" did not generate on the Loans | Loans report template.
- Corrected an issue with the "Requirements" report templates where loans with a status other than active did not generate.
- Corrected an issue where the Loan | Loans report template did not produce information for the "Primary Borrower" data field.

Collateral Sub-Category

Corrected an issue where the Collateral Sub-Category did not reflect information in the UI that was entered and saved.

Enhancements

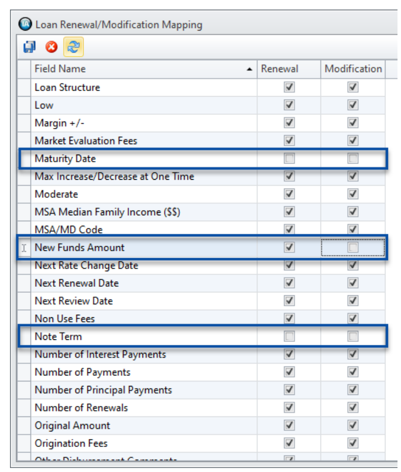
Review Queue Administration | Enforced Sorting and Group



Added options, within the Review Queue Administration Layout Tab, to define Group and Sorting options specific to each queue. Functionality allows single and multiple grouping and sorting selections.

Prior functionality automatically organized each review queue by the order the documents were added to INFO-ACCESS but allowed each user to group, sub-group, and sort as needed. This enhancement allows administrators to further define the layout and organization of the results in the queue presented to workers upon load of the queue. Group and/or sort settings allow administrators to organize the queue by primary borrower, lender, date fields, and more. Each user still retains the option to reorganize the group and sort as needed.

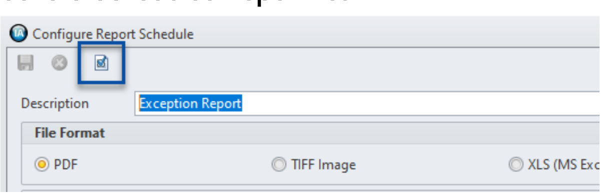
Deal | Loan Renewal and Modification Field Settings



Added an administration menu (Deal|Loan Renewal/Modification Mapping) that allows administrators to define fields that should be wiped blank when a user moves a loan into the Deal Management Module for the purposes of renewal or modification. This ensures that fields that require new input (like maturity date) are not missed, leaving the information from the original loan in place.

INFO-REPORTS

Send a Scheduled Report Test



Added a "Test" button to the Configure Report Schedule menu to allow administrators with rights to set up scheduled reports the ability to generate and send a test of the report schedule to ensure schedule report emails are being sent, saved, or archived as expected.

Scheduled Report Email Subjects

Changed the email subject line of scheduled reports from "Scheduled Report Sent from INFO-ACCESS" to "<<Report Title>> sent from INFO-ACCESS" to help users who receive multiple scheduled reports work more effectively, deciphering which email contains which report.

Renaming Published Reports

Added the ability to rename published reports via a "Rename Report" tool button presented once a published report is selected.