New Loan Entry Workbook - Administrative Topics

Included in this document:

- Refreshing Strategy Data (PINFO Values)
- Security for Submitting Loans

Updating PINFO Codes within the New Loan Entry Workbook

Refreshing PINFO values

The PINFO values used in the drop downs on the data entry sheets are captured from the PINFO worksheet. The drop down values can be refreshed to capture PINFO updates in the data library using an API embedded in the spreadsheet. The Refresh Strategy Data button on the Control Sheet updates the PINFO sheet in the New Loan Entry Workbook as well as all the drop down values on all other data sheets.

PINFO API

The Control sheet in the New Loan Entry Workbook contains a button that calls the PINFO API. This API populates the PINFO sheet (the last sheet in the workbook) with data from the Strategy PINFO file.

This data can only be updated by an authorized user.

To make sure that the PINFO API will work properly:

1. Check the Config tab. This tab needs to be populated with
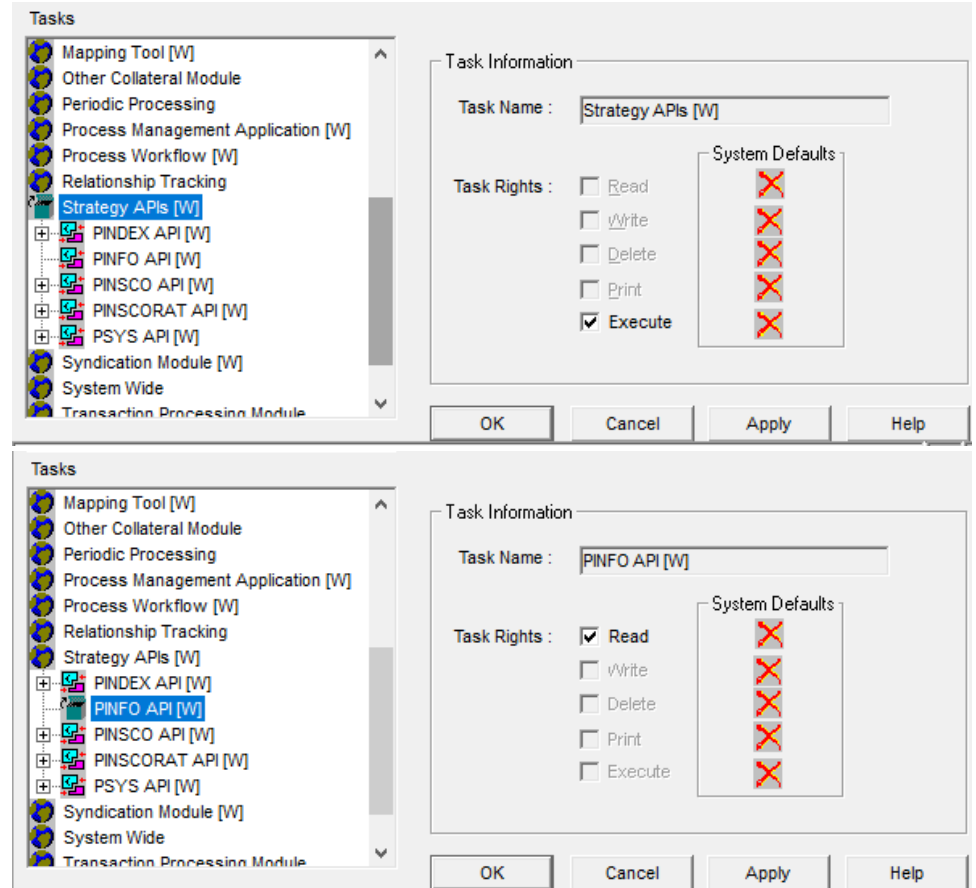   a. IP address of the Portal instance,
   b. the data library name.

2. Check Security

The person updating the spreadsheet must have access to both Strategy APIs [W] and PINFO API [W] for the API to connect to the database.

- Strategy APIs [W] – Execute (16) rights
- PINFO API [W] – Read (1) rights

NOTE: When downloading a new copy of the New Loan Entry Workbook, the **Refresh Strategy Data** should be run before entering loans.

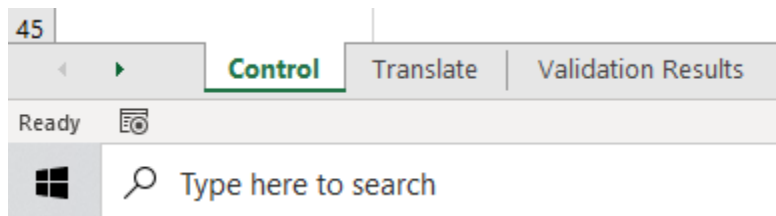---

To Update the PINFO values

2. Click the **Refresh Strategy Data** button

Once the user has been authenticated, the Ready message in the lower left hand corner of the Excel window flashes different messages as the PINFO information updates.


- Retrieving PINFO
- Parsing PINFO

When all sheets have been updated, the message returns to Ready. The PINFO information on the PINFO Sheet has been overwritten and the drop down values on all the spreadsheets have been updated to retrieve the updated data for selection.
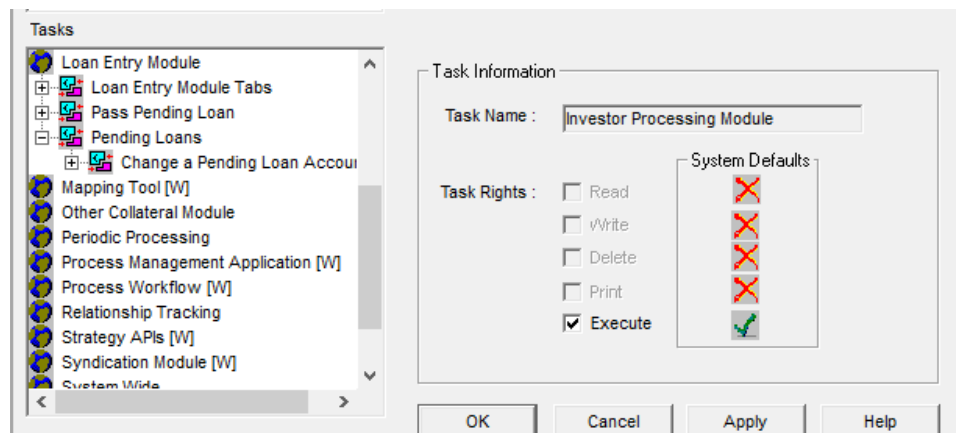
Security to Submit Loans with the New Loan Entry Workbook

Users must have the following security rights to Submit or Upload the data into Strategy.
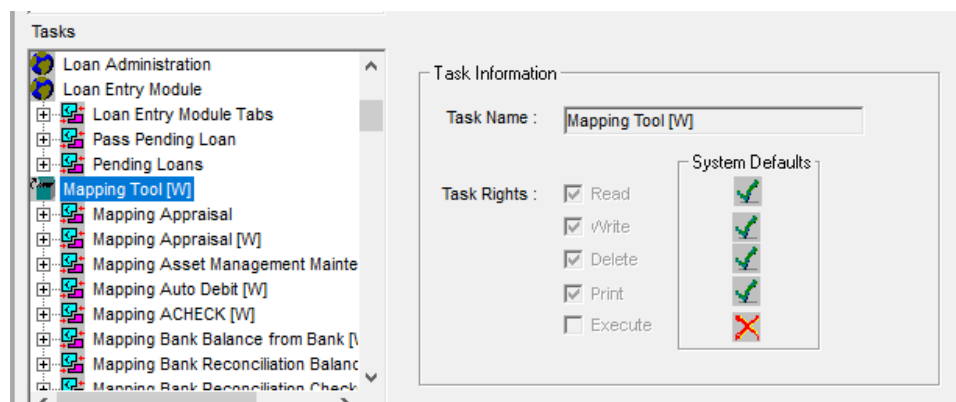
-
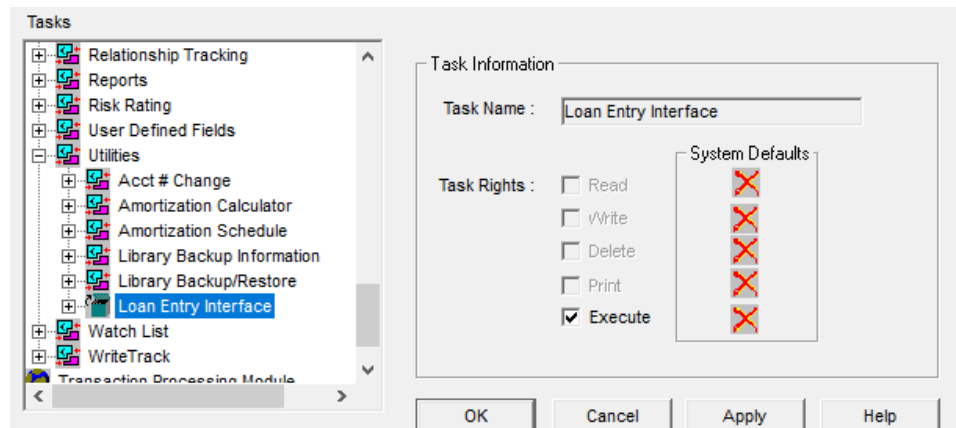
Execute rights to the Loan Entry Interface

System Wide>Utilities>Loan Entry Interface

Execute rights to the Loan Entry Module,

Execute rights to Loan Entry Module Tabs.

Read, Write, Delete, Print, rights to the Mapping Tool [W]

Read, Write, Delete, Print, rights to Mapping Main [W]

Read, Write, Delete, Print rights to all Mapping Loan Entry templates