

# Loan IQ.Academy.AI

## Role-based training for Loan IQ users of all skill levels

Finastra is offering curated training and certifications for Loan IQ users. The course content is structured to enhance the skills of all users, equipping them with the domain knowledge and product skills needed to navigate complex business and technical requirements.

The learning program integrates practical product knowledge, reinforced with contextual business insights. Aimed at professionals with business and technical responsibilities, the Loan IQ.Academy.AI courses offer an online learning approach, combined with interactive sessions and hands-on training.



### Course structure

Components	Delivery method	Format
Introduction	In-person* / remote	Introduce the participants to the course structure, timelines and tests / certifications
Role-based learning paths	Remote, self-paced	Self-paced training with each learning path covering a series of subject areas consisting of several modules
Webinars / Q&A	Remote, instructor-led	Guest lectures are arranged at regular intervals
Certification	Remote	Certifications provided based on different roles

\*In-person training will be available for Bangalore-based clients



### Course outline

We plan to offer three stages of certifications, covering Foundation, Advanced and Specialist levels. An additional course for the Delivery domain, with a focus on Loan IQ implementation, is also planned.

The Foundation and Advanced levels are available for subscription now. The courses and the topics / concepts covered in these courses are as follows:

#### Foundation Course: Basic Business Concepts and Loan IQ Fundamentals

##### Lending Business Basics

- Lending principles
- Bilateral lending and syndicated lending
- Interest rates and calculations
- Payment methods
- Lending methods

##### Loan IQ Fundamentals

- Loan IQ structure
- Loan IQ navigations
- Branch and zone setup
- Customer setup
- Deals and facility
- Fee and interest pricing rules
- Security

#### Advanced Course: Advanced Business Concepts & Loan IQ Features

##### Lending Business - Advanced

- Fee types & characteristics
- Discount loans
- Interest calculation
- Lending operations - trades
- Lending operations - outstandings
- Lending operations - payments
- Document tracking
- Collateral
- Basic accounting

##### Loan IQ Features

- Repayment schedules
- Type of payments
- Adjustments, amendments and reversals
- Cashflows and payment processing
- Automated transactions
- Accounting & control
- Manual GLs / cashflows / funds flow
- Data model
- Batch configuration
- Queries / SQL
- Ticklers, ad-hoc queries

We are working to create the Specialist and Implementation courses. Watch this space for more information on future learning offering.

#### Specialist Course: Expert Learning topics

##### Functional

- Accounting configuration
- Test strategy
- Migration strategy
- Target operating model

##### Technical

- DataNet
- Software development kit (SDK)
- Reporting
- Data conversion tool
- Integration overview & support
- Corporate structure configuration
- Configuration tools

#### Implementer Course: Delivery Domain

##### Methodology

- Finastra delivery methodology
- Keystone model
- Delivery plan
- Roles & responsibilities
- Model bank
- Standard integrations
- Target operating model review

##### Governance & Tools

- Statement of work
- Configuration tools and build process
- Migration strategy
- Test strategy
- Stand ups
- Steering committee
- Change control
- Escalation management

### Find out more

If you have any questions or would like additional detail including commercials, please contact [LoanIQ-Academy@finastra.com](mailto:LoanIQ-Academy@finastra.com)