

# LaserPro Loan Activity Report

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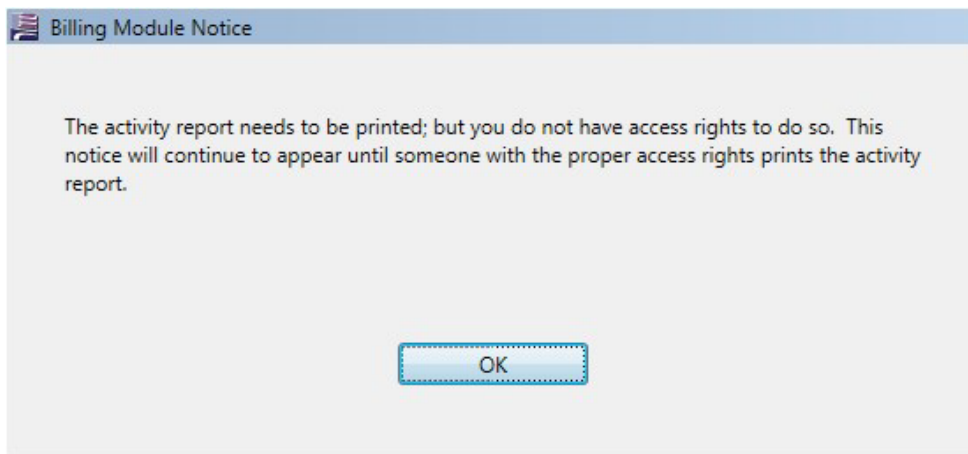
Revised July 2024

## What is the Loan Activity Report?

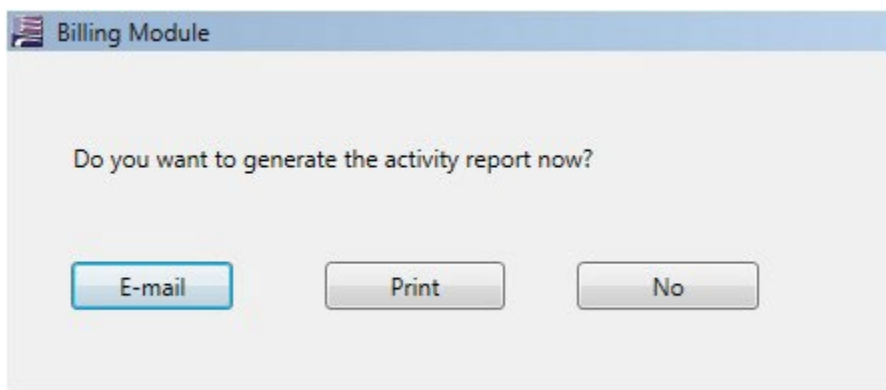
The LaserPro Loan Activity Report is used by Finastra to track the number of loans you create in LaserPro (on-prem).

## When is the Activity Report generated?

The Activity Report is available to generate the first time you log into LaserPro each month. You are given the option to print or email the report; however, emailing is the preferred method of receipt by Finastra. In a network installation, the first LaserPro user to log in each month is given the option to generate the report from the **Billing Module Notice** window. If you have multiple installations, a separate Activity Report prints for each installation. Rights to print the Activity Report are controlled by the Access Groups in General System Setup. If a user is assigned to an Access Group that does not have rights to generate the report, LaserPro displays this message:



A user who has rights to print the report sees this message:



These windows display at every login until a user with appropriate rights confirms that the report has been generated. If LaserPro is not used for more than one month, it generates a report for each month since the last time it was generated. If the installation has more than one institution set up in General System Setup, a separate report is generated for each institution.

## How does the Activity Report count the number of loans?

LaserPro increments the loan count on the Activity Report the first time you select **Print** and go to the **Document Selection** window in *Closing Only Data Mode* (or when you select the *Closing* form set when printing while in *Full Data Mode* in *Closing Only Data Mode*) in a transaction. The transaction is counted whether or not you actually print any documents. Printing in *Application Only Data Mode* does not affect the loan count.

When a transaction that has already been counted is recalled and the transaction changes significantly enough, we consider it to be a new loan and the program increments the loan count again. For a transaction to be counted again, one of the following conditions must be true:

- the **Disbursement Date** has changed by 120 days or more or
- the first **Borrower's** name has changed and the **Note Without Insurance** amount has changed.

A new transaction created by using the **Save As...** option is assigned a new transaction number and is counted as a new loan if the Document Selection window is visited as outlined above.

There are no exceptions for when a loan is counted or recounted. For example, Loan Renewals and Change in Terms transactions are recounted as a loan when recalled and meet the parameters for recount noted above.

All loans, including those used for testing, training, or any non-production purpose, created in your production environment and reflected in your loan activity shall be counted against your Loan Block. Any loans created for non-production (testing, training, etc.) purposes should be done in a separate test environment, to avoid counting of non-production loans against your Loan Block.

## Why do the totals on the Activity Report not match my Standard Reports?

The totals that appear on the Activity Report may differ from the number of loans in your system or on the LaserPro Standard Reports. The Activity Report counts all transactions where you have visited the **Document Selection** window in Closing mode. It does not exclude test loans. It also counts loans that were printed even if you later deleted the transaction. The Standard Reports in LaserPro count only the loans that are currently in the system when the report is generated. These Standard Reports do not count loans that were deleted, and they count all loans that were saved, even if the **Document Selection** window was not visited.

LaserPro keeps an audit trail of the data behind the loan counts in the Activity Report. The audit trail data can be exported from General System Setup as a comma delimited file for your review and analysis. From the Main Menu in General System Setup select Tools > Export Loan Activity. You can then specify the location for the file and filter the data by date or main office. The report contains information about when a loan was counted or recounted, and the values for the fields that control the recount discussed above, and the date, time, and the user who was in the system when the count or recount occurred.

Please see the *General System Setup Guide* for more details.

## **How can I generate the actual reports from previous months?**

Loan activity reports for the current calendar year can be generated from LaserPro. From the main menu select Reports > Print Activity Report... In the dialog box that displays, select whether you want all activity or a specific month or range of months, then select Print Preview or Print. **Note:** If you have the LaserPro print destination set to default to Print Preview, the Print option is not available. See “Reprinting the LaserPro Loan Activity Report” (article number 000045323) on the Finastra Customer Success Community for more information. To find this article, log on to Customer Success Community (<https://support.finastra.com>) and enter the article number in the main search bar.

## **After a merger, how should we report loan activity if we still have two different LaserPro installations?**

Send in a report from each LaserPro installation. Do not try to combine the totals from each report. The data is electronically read from the reports. As long as we have been informed of the merger we will combine the totals from both reports and allocate them to the surviving institution.

## **Who must send the Activity Report to Finastra’s Billing Department?**

All LaserPro (on-prem) customers must send in their Activity Reports. They may be emailed to [LoanTotals@Finastra.com](mailto:LoanTotals@Finastra.com). Please do not send your report more than one time or your billing may reflect duplicate reports.

## **If my institution is not billed per loan for use of LaserPro, do I still have to send the Activity Report?**

Yes. All customers are contractually obligated to send the Activity Report, even if the amount you are billed is not affected by the number of loans you process.

If you have questions or need assistance, please visit the Finastra Customer Success Community at <https://support.finastra.com> to log in to our online self-service Case Management system.