

Academy.AI.Loan IQ

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 Academy.AI.Loan IQ 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 offer three stages of certifications, covering Foundational, Advanced and Specialist levels. An additional course for the Delivery domain, with a focus on Loan IQ implementation, will be available in 2025. The courses and the topics / concepts covered in the course are as follows:

Foundational Course: Basic Business and Loan IQ Fundamentals

Lending Business Basics

- Lending principles
- Lending Profiles
- Organizational Structure
- Bilateral lending and syndicated lending
- Interest rates and calculations
- Payment methods
- Lending methods
- Lending operations

Loan IQ Fundamentals

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

Advanced Course: Advanced Business, Functional and Technical Concepts

Lending Business - Advanced

- SWIFT Payments
- KYC / AML
- Collateral
- Covenants
- Asset Based Lending
- Cash Management
- Construction Finance
- Project Finance
- Credit Approval Process

Functional

- Repayment schedules
- Type of payments
- Adjustments, amendments and reversals
- Cashflows and payment processing
- Automated transactions
- Accounting & control
- Manual GLs / cashflows / funds flow
- Alternative Reference Rates (ARR)
- Collateral
- Deal Termination
- Ticklers, ad-hoc queries

Technical

- Reversals
- Auto Generation
- Approval matrix
- User Profile
- Ad hoc Queries
- Data Model
- System Admin
- Batch Configuration
- APIs
- Queries / SQL
- Integration Overview & Support
- Configuration files

Specialist Course: Integration / Migration, Reporting, Accounting and Software Development Kit (SDK)

Integration / Migration Specialist

- Data Conversion Tool
- Migration Strategy
- Password Encryption in config files
- Remote Ops

Reporting Specialist

- Prerequisites: Installation and Configuration
- DataNet Installation and Deployment
- DataNet Overview
- Cognos Query Studio
- Cognos Report Studio
- Standard Reports

Accounting Specialist

- Organization Structure
- Overview of Accounts and Portfolios
- Accounting mapping
- Interest and Fee Accruals
- Non-performing Assets
- Portfolio Allocations and Positions
- P&L topics

SDK Overview

- Pre-requisites and Overview
- Validations and Actions
- Scripting API and Scripted Batch
- Inquiry API
- User Defined Functions
- Scripted Notices and Bills
- Controller Events
- SDK Artifacts and Tools

SDK Implementation

- Pre-requisites and Overview
- Eclipse Environment Setup
- Loan IQ Environment Setup
- Use Cases and Customization Codes
- Deployment Procedures
- Deployment Steps for Scripted API

Implementer Course: Delivery Domain (Coming soon in 2025)

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 pricing, please contact LoanIQ-Academy@finastra.com