Octane Core Training Video Series

Module Inventory

Overview

The Octane Core Training Video Series contains (34) videos, or modules, which average just under ten minutes each. This content is intended to provide a baseline training of Octane to all users, regardless of their role. Below is an outline, basic description, and link to each video.

1. Introduction to Octane

Backstory, key, and unique features, initial account activation, subsequent sign in, remote access.

Introduction to Octane | Duration: 7 min. 32 sec.

2. Octane Step by Step- Your Guide to Origination

The suggested path within the loan context menu for building a loan from inception to submitting to mortgage operations. While typically completed by LOs, relevant for all users to understand.

Octane Step by Step- Your Guide to Origination | Duration: 14 min. 21 sec.

3. Toolboxes

A brief review of the toolboxes found on the homepage that a typical user would have including Workflow Queues, Reports, Rate Search, Add Loan, and Pipeline. Future modules in the series provide deep dive into each toolbox.

Toolboxes | Duration: 3 min. 39 sec.

4. Workspace Header

Overview of the content found in the Workspace Header including Support, Announcements, Notices, Loan Search and User Profile.

Workspace Header | Duration: 5 min. 32 sec.

CARDINAL
FINANCIAL COMPANY | LIMITED PARTNERSHIP

5. Loan Ribbon

A detailed review of each data element in the loan ribbon, including all breakdowns and badges.

Loan Ribbon | Duration: 8 min. 55 sec.

6. Adding a Loan

A comprehensive review of all (3) loan creation methods, as well as options for applications, prequalifications, and preapprovals.

Adding a Loan | Duration: 5 min. 46 sec.

7. Borrowers

Introduction of submenus concept, creation of all types of borrowers: borrower, co-borrower and non-applicants. All submenus reviewed in detail, multi-application transactions and how to delete a borrower.

Borrowers | Duration: 12 min. 38 sec.

8. Pulling Credit

How to pull credit, NTB, Public Records, Inquires, and Archived Reports all reviewed in detail.

Pulling Credit | Duration: 9 min. 37 sec.

9. Liabilities

Review of Liability page topography, deep dive into all aspects of liabilities with examples of mortgages, revolving, 30-day accounts, and installments. Alerts explained and examples cited. All dispositions reviewed and explained. How to manually add a liability.

Liabilities | Duration: 15 min.

10. Income Part I

Overview of Income types, corresponding Smart Documents and Income Worksheets. Specifics and examples shown for W2 and Self Employed borrowers.

Income Part 1 | Duration: 12 min. 18 sec.

11. Income Part II

Detailed examples of Business with Job Income, Other Income Military, Job Gaps and how to delete an income.

Income Part 2 | Duration: 9 min. 5 sec.

12. Assets

Specifics regarding adding assets, asset types, including examples of checking account, large deposits, gift funds, EMD, retirement accounts, deleting assets, funds for closing and basic elements of grants.

Assets | Duration: 7 min. 45 sec.

13. Property

General overview, then a detailed review of all submenus on the subject and other properties, including unique attributes of purchase vs refinance. Adding other properties.

Property | Duration: 15 min. 49 sec.

14. Terms

Review of only the terms submenu, including how to price a loan. Locking to be covered in LO Role Specific Series.

Terms | Duration: 5 min.

15. Charges and Credits- Part 1

General philosophy and design of Smart Charges. Deep dive into Charges, Escrow, Taxes, HOI, Escrow Analysis, and Recording submenus.

Charges and Credits- Part 1 | Duration: 10 min. 51 sec.

16. Charge and Credits- Part 2

In-depth review of IPC, MI and how to edit charges and credits

Charges and credits- Part 2 | Duration: 10 min. 9 sec.

17. Tolerance Cures

How to identify and cure a tolerance cure and why they occur. Emphasizes the firm's financial interest, and all compliance related elements.

Tolerance Cures | Duration: 8 min. 31 sec.

18. AUS

Loan Checks concept introduced, how to run AUS, Key Findings tab, Smart Sync explained in detail.

AUS | Duration: 6 min. 56 sec.

19. Transaction

All data elements on the main page reviewed. Cancel, Copy, Delete transaction tabs, Fannie Mae Export and Tags tabs explained.

Transaction | Duration: 10 min. 4 sec.

20. Understanding the Workflow- Part 1

Extensive but easy to understand explanation of the theory and design of the Workflow. Work Steps and Work Assignment system options reviewed.

Understanding the Workflow- Part 1 | Duration: 11 min. 25 sec.

21. Understanding the Workflow- Part 2

Role configuration and restrictions, Performer Override, Load Balance Push in great detail.

Understanding the Workflow- Part 2 | Duration: 7 min. 15 sec.

22. Using the Workflow- Part 1

Actual use of the Workflow, including Pending, Wait, Requires Escalation, Ready for Quote, Remove Loan, Invite Borrower.

Using the Workflow- Part 1 | | Duration: 13 min. 19 sec.

23. Using the Workflow- Part 2

Addition real-world use of the Workflow, including Ready for Application, all Disclosure Methods, and ITP.

Using the Workflow- Part 2 | Duration: 12 min. 14 sec.

24. Workflow Queues

Review of the overall concept, your "to-do" list, specific examples cited, including the movement of a loan to various steps. Filters explained. Best practices explained and defined as company policy.

Workflow Queues | Duration: 7 min. 25 sec.

25. Reports

Explanation of what Reports are used for, Loan, Loan Step, and Loan Activity each explained and examples of each illustrated.

Reports | Duration: 6 min. 23 sec.

26. Pipeline

Overview of the design, the topography of the front page reviewed. Filtering options and example of using the filters shown.

Pipeline | Duration: 6 min. 32 sec.

27. Overview

Landing page when entering a loan via Recents or Loan Search Box, 30,000’ view of (7) key areas of a loan.

Overview | Duration: 4 min. 47 sec.

28. Activity

Explanation of the concept and reason for this page. Filters and examples of typical searches reviewed.

Activity | Duration: 4 min. 45 sec.

29. Documents- Part 1

The overall concept of Smart Documents, import methods, PDF auto-conversion, Documents, Packages, Stacks, Dropbox, Archived submenus all reviewed at a high level.

Documents- Part 1 | Duration: 10 min. 49 sec.

30. Documents- Part 2

In-depth look into specifics of Requirements, Fulfillment, Included Files, Decision, File Status, Actions, all Borrower Side Documents, all filter options including Advanced.

Documents- Part 2 | Duration: 11 min. 22 sec.

31. Mismatch / Process Changes

What is a Lock Mismatch, where to see the (3) indicators, potential implications, how to Process Changes to get the lock and the loan back in sync.

Mismatch / Process Changes | Duration: 6 min. 5 sec.

32. Compliance

A comprehensive explanation of each submenu, the system performs these tests automatically, how to cure if in violation.

Compliance | Duration: 9 min. 18 sec.

33. Note and Messages

Review of these critical communication tools. Examples of each displayed.

Notes and Messages | Duration: 7 min. 9 sec.

34. Team

Overview of the concept of the Team page, examples shown.

Team | Duration: 5 min. 55 sec.