**INFO-ACCESS**

**Deposit Configuration Training Worksheet**



## GETTING STARTED

* Determine if your institution uses auto-configure or manual configure.
* Review and understand the difference between auto-configure or manual configure.

## CONFIGURING REQUIREMENTS

* Review and understand the difference between Configure-All and Configure Individual.
* Choose Configure All
  + Required vs Default Requirements
  + Configure requirements for each section in the left-side menu:
    - Deposit
    - Entities
  + Add requirement descriptions (if necessary)
  + Set the requirement dates.
  + Select barcode cover pages to print.
  + Order the barcode cover page print order.
  + Choose documents for barcode cover page only printing
  + Set/Finish the requirement configuration.
  + Review the configuration in the Requirements work window.
* Choose Configure Individual
  + Configure requirements for each section in the left-side menu:
    - Deposit
    - Entities
  + Add requirement descriptions (if necessary)
  + Set the requirement dates.
  + Set/Finish the requirement configuration.
  + Review the configuration in the Requirements work window.
* Auto-Configure
  + Review the requirement tracking administration menus where auto-configuration is setup.
    - Deposit Types
    - Account Holder Types

## CONFIGURATION STATUSES

* Review configuration statuses
  + Unconfigured
  + In Progress
  + Auto-Configured
  + Configured
  + Partially Configured

## BARCODE COVER PAGES

* Add bar code cover pages to account document package
* Scan, import, or upload the account package

## VIEWING & REPORTING EXCEPTIONS

* Review requirement statuses for exception tracking
* Exceptions appear in **Work Queues** and on **Reports**

## RELATED MATERIALS

* INFO-ACCESS Administrator Guide
* INFO-ACCESS User Guide
* Quick Reference: Configuration Status Logic
* Quick Reference: How to Communicate & Report Invalidation Reasons
* Quick Reference: Understanding Requirement Dates
* Training Video: Deposit Configuration