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