Workspaces

JOURNEY MANAGER

TEMENOS

TOC

Journey Workspaces Overview

Workspaces | Workspaces User | 18.11 | 21.11

Efficient resolution and assistance for customers is an essential part of omni-channel customer acquisition. Journey Workspaces, powered by Journey Manager, is an integral module of the Temenos Journey Platform that enables your organization to improve the quality of customer experience with onboarding assistance, rapid resolution, and communication of progress, regardless of the channel they are applying from.

What is Workspaces?

Journey Workspaces is a highly configurable and feature-rich business portal for banking staff, designed to support resolution and customer service activities related to account opening and onboarding directly in the account opening process. Workspaces supports a digital workflow for in-bound applications that enables bank staff to initiate, review and resolve customer applications, and provide great customer service. Bank staff are offered an efficient method of receiving, tracking, organizing, and resolving pending applications that improves both their productivity and the accuracy of the application review process.

In the Workspaces portal, you can search and filter to find an application then view all the key application details, enabling bank staff to provide a richer customer assistance experience and make an informed decision about an application's outcome. You can filter and assign applications for review based on criteria such as workloads, decision status, risk, or incomplete application data. Application assignment features enable managers to control staff workloads, helping to reduce the onboarding delays that can lead to customer dissatisfaction. Throughout the account opening process, Workspaces captures notes and user- and system-initiated actions that document an easy-to-understand audit trail of the application life cycle. With visibility into all the application information at your fingertips, you can quickly resolve pending applications with a final decision and communicate back to the applicant to increase customer acquisitions and improve customer service.

Out of the box, Workspaces comes with a collection of thoughtfully designed, pre-tested templates for several role-based spaces that facilitate processing, helpdesk, and application management activities as well as kick-starting applications on behalf of customers and monitoring their progress. These templates represent common work scenarios and take advantage of third-party integrations to add meaningful features. The templates accelerate the installation and configuration process and can also be used as the basis for your own custom Workspaces experience.

Who is Workspaces for?

Workspaces provides features for several user types or purposes.

Review	**Processing Staff**	Workspaces offers review capabilities for pending applications that need manual action.

Support	**Helpdesk Staff**	Workspaces allows support staff to find any application that needs further assistance quickly and easily.
Assist	**Assisted Channel Staff**	Workspaces allows assisted channel staff to kick start the application process and track application progress.
Manage	**Managers / Supervisors**	Workspaces provides tasks management capabilities for managers.
Applications	**Authenticated Applicants**	The Workspaces Applicant space offers a self-service portal for managing application creation, follow-ups, and keeping track of application progress.

To learn more about the Workspaces Applicant space, see Workspaces Applicant Space Overview, The Applicant Space Search Screen, and The Applicant Space Details Screen.

Getting Started

Configuration

Workspaces is a highly configurable product, so we provide a set of default configurations to get you up and running faster. You can download the Workspaces distribution, including the default configurations. More information is available in the Workspaces technical documentation to help you configure your Workspaces portal to meet your needs.

Browser Support

Workspaces has been designed for and tested against the following web browsers.

- Google Chrome
- Mozilla Firefox
- Microsoft Edge
- Microsoft Internet Explorer 11 (limited support - see **IE11 Support** below)

For the best experience, we recommend that you use the latest version of Chrome, Firefox, or Edge, and that you keep your browser updated, especially through the application of security patches.

While you may be able to access Workspaces using other browsers, there's no guarantee that everything will work, and you may not enjoy the great user experience available when using a supported browser. We strongly recommend that you use a supported browser for the best Workspaces experience.

IE11 Support

Workspaces is supported on Internet Explorer 11 (IE11), commencing from Workspaces v18.11.4. Workspaces is feature-compatible with IE11; however, the user experience on IE11 may not be as great as when using a modern browser due to limitations imposed by IE11.

What's new?

Here's some information to help you discover the great new features and improvements in each Workspaces release.

21.11 20.05 19.11 19.05 18.11

Here's what's new and improved in Workspaces 21.11.

Improved build and deployment process	An improved build and deployment process for Workspaces is now available from the Product Artifactory.
Applicant Space template	A fully configurable workspace for authenticated non-bank users to manage the application journey.
Support for Job Properties	Support for configuring the Key Info card and custom cards using the application's job properties.
Localization improvements	Support for switching the language within Workspaces, and other minor enhancements to the localization framework.
Search improvements	Configure search to include fields that are not part of the item list data.

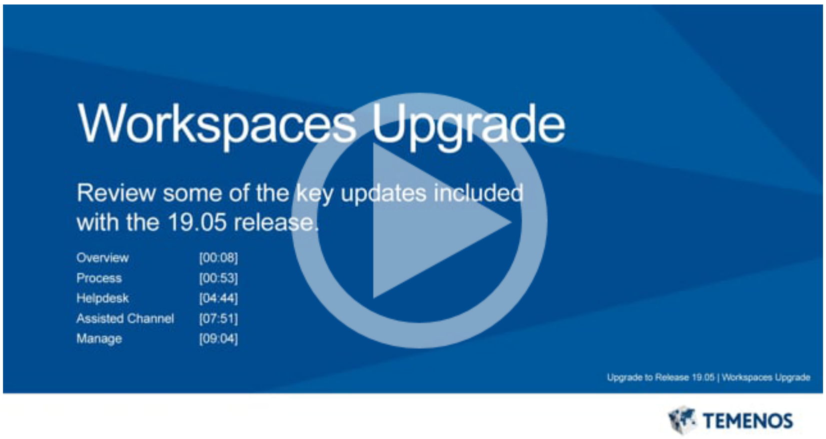
Here's what's new and improved in Workspaces 20.05.

Improved build and deployment process	An improved build and deployment process for Workspaces that supports seamless integration to your DevOps practices such as CI/CD.
Task-specific actions	Task-specific actions are presented alongside each task in an application to give you confidence you are acting on the right task.
Focused search	A new focused search option that lets you search on a specific application data item and get results faster.

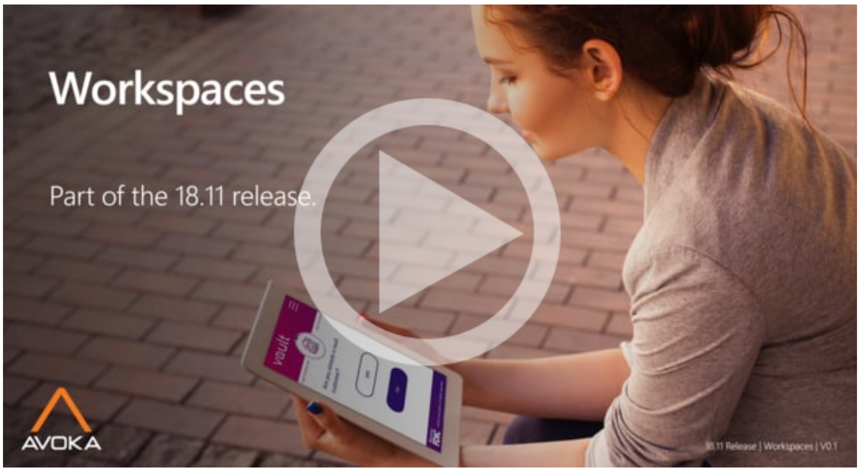
Improved UI / UX	A fresh new user interface for an improved user experience.
Improved custom card con-figurations	Improved custom card configuration including permission control and an option to hide empty/null data.
Improved session logout	Automatic session logout after a defined period of inactivity.
Date picker enhancements	Enhancements to the date picker to support single date selection and custom date formats.
Enhanced search/-filter behavior	New search/filter behavior on the List pages: the latest search/filter is retained in each space until cleared or the session ends.
Enhanced applic-ation assignment	The assignee full name is displayed when assigning a task to a user.
Enhanced applic-ation listing	An enhanced view configuration extending control over line wrap-ping in data tables.
Enhanced doc-uments panel	Attachment name is now included for each item in the Documents panel.

Watch this video to discover the great new features and improvements in Workspaces 19.11.

Watch this video to discover the great new features and improvements in Workspaces 19.05.



Watch this video to discover the great new features and improvements in Workspaces 18.11.



Workspaces Core Concepts

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Journey Workspaces is underpinned by a set of core concepts. Learning about these concepts will help you to understand how Workspaces works, allowing you to get the most out of your Workspaces experience.

- Roles and Spaces
- Applications and Tasks
- Service Level Agreement (SLA) | 19.11
- Queues
- Views
- Access Control

Roles and Spaces

Roles and spaces are used together in Workspaces to define workflow solutions for various purposes. Each **role** is aligned with a specific user type and represents a responsibility you might have or a job you need to do. Roles are also used to control each user's access to Workspaces spaces and features.

Workspaces has been designed with several roles in mind, each of which is associated with a **space** that may be available to you in your Workspaces portal. Each space is configured with various features designed to facilitate its associated role or purpose.

- **Process** - For processing staff, offering review capabilities for pending applications that need manual action.
- **Helpdesk** - For helpdesk staff, to find applications quickly and easily so they can provide prompt and accurate customer assistance.
- **Assisted Channel** - For relationship managers, to kick start the application process on behalf of customers and monitor application progress.
- **Manage** - For managers and supervisors, providing task management capabilities.
- **Applicant** - Allows applicants and their representatives to interact with applications through to completion.

The default Workspaces configuration includes the Process space, Helpdesk, Assisted Channel, and Manage spaces for use by bank staff in various roles. Alternatively, Workspaces can be configured with just the Applicant space for use by applicants and their authorized representatives. Regardless of how Workspaces is configured, only authenticated users can access it.

Applications and Tasks

It's important to understand the difference between an application and a task.

- An **application**, sometimes referred to as an application form, refers to both the form that you enter data into when applying for a product and the data itself. The life cycle of an application progresses through various stages, from the initial submission to a final decision or even abandonment.
- A **task** represents an application at a particular stage of its life cycle, or step in the processing of an application. As a task moves through its life cycle, it becomes available on different queues making the task available for attention by the staff that have access to each queue.

Abandoned Applications

Sometimes, an application is started but not saved or submitted. This could be a deliberate choice by the applicant, but it may also be due to circumstances beyond the applicant's control; for example, if their browser crashes or the form session times out. Regardless of how or why it happens, an application that hasn't been saved or submitted eventually becomes **abandoned** (assuming the application form has been configured with the background save feature enabled).

> An abandoned application does not have an assignee. An application must be submitted before it can be assigned or claimed.

After an application has become abandoned, the applicant may decide that they want to continue their application. Workspaces allows you to recover an abandoned application, within a configured time frame, so that the applicant can continue the application they started without having to re-enter any saved information.

> Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

Service Level Agreement (SLA) | 19.11

Workspaces enables you to monitor the progress of each submitted application against a crucial service indicator, such as an **SLA**[1] (Service Level Agreement). The Workspaces SLA feature follows a three-stage time-based approach using two pre-configured time periods:

- **SLA Period** – The maximum amount of time allowed to complete processing of the application under the terms of the SLA.
- **SLA Warning Period** – An amount of time, shorter than the SLA Period, during which the application will be flagged as approaching the end of the SLA Period.

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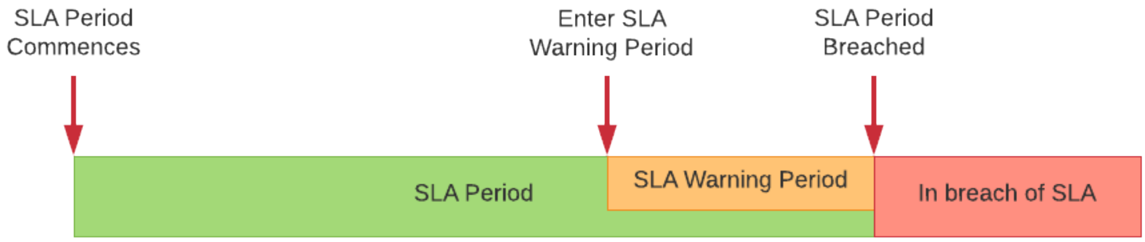
[1] A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

The terms of an SLA will stipulate the SLA Period's duration and when it commences. It's common for the SLA Period to commence when the application is submitted but it may be any time after this. While the SLA Period is measured from when it commences into the future, the Warning Period, by contrast, starts at a point in time measured backwards from the end of the SLA Period. The following diagram illustrates the relationship between the two periods and the key SLA milestones.



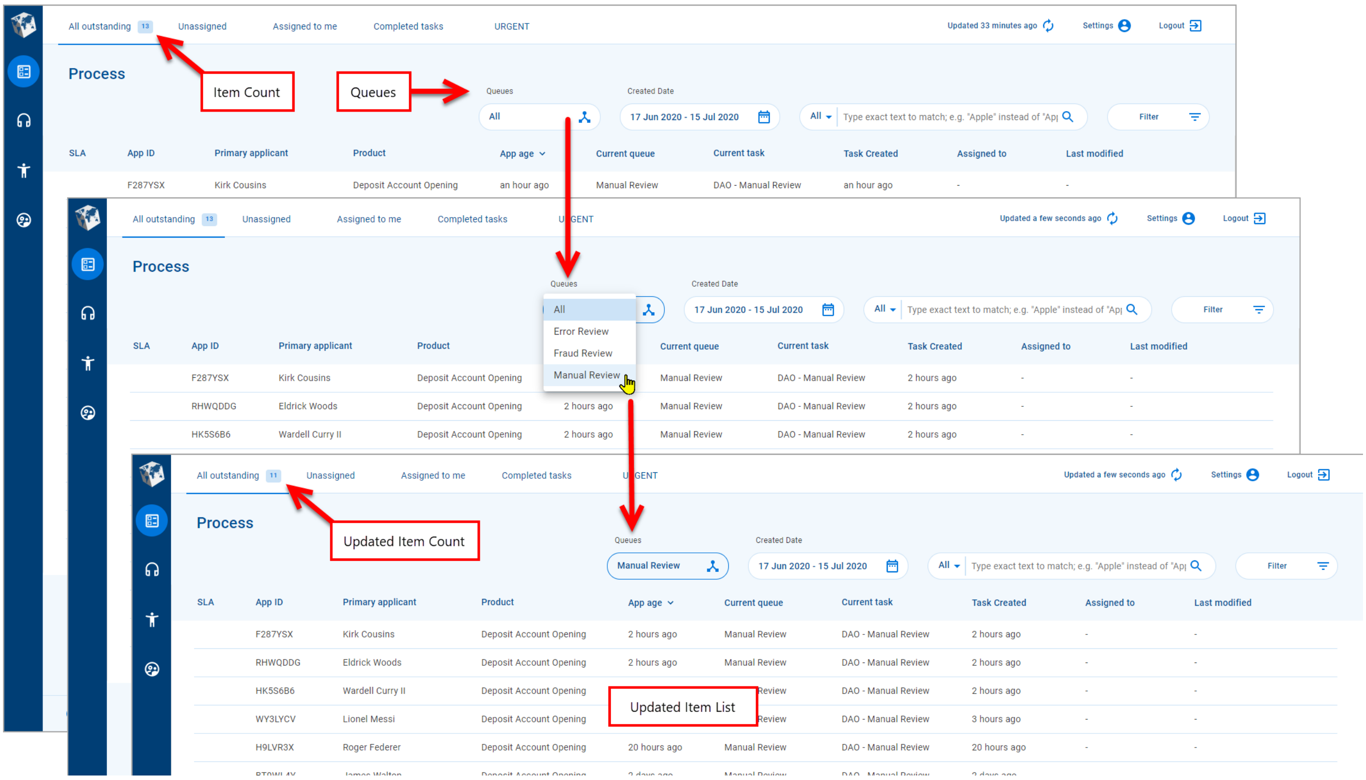
You can easily monitor the progress of applications against an SLA using the SLA Expiry field in the Key Info card on the Details page. Also, in the Process space and Manage spaces, there's a graphical SLA indicator in the item list that provides an overview of application processing progress at a glance.

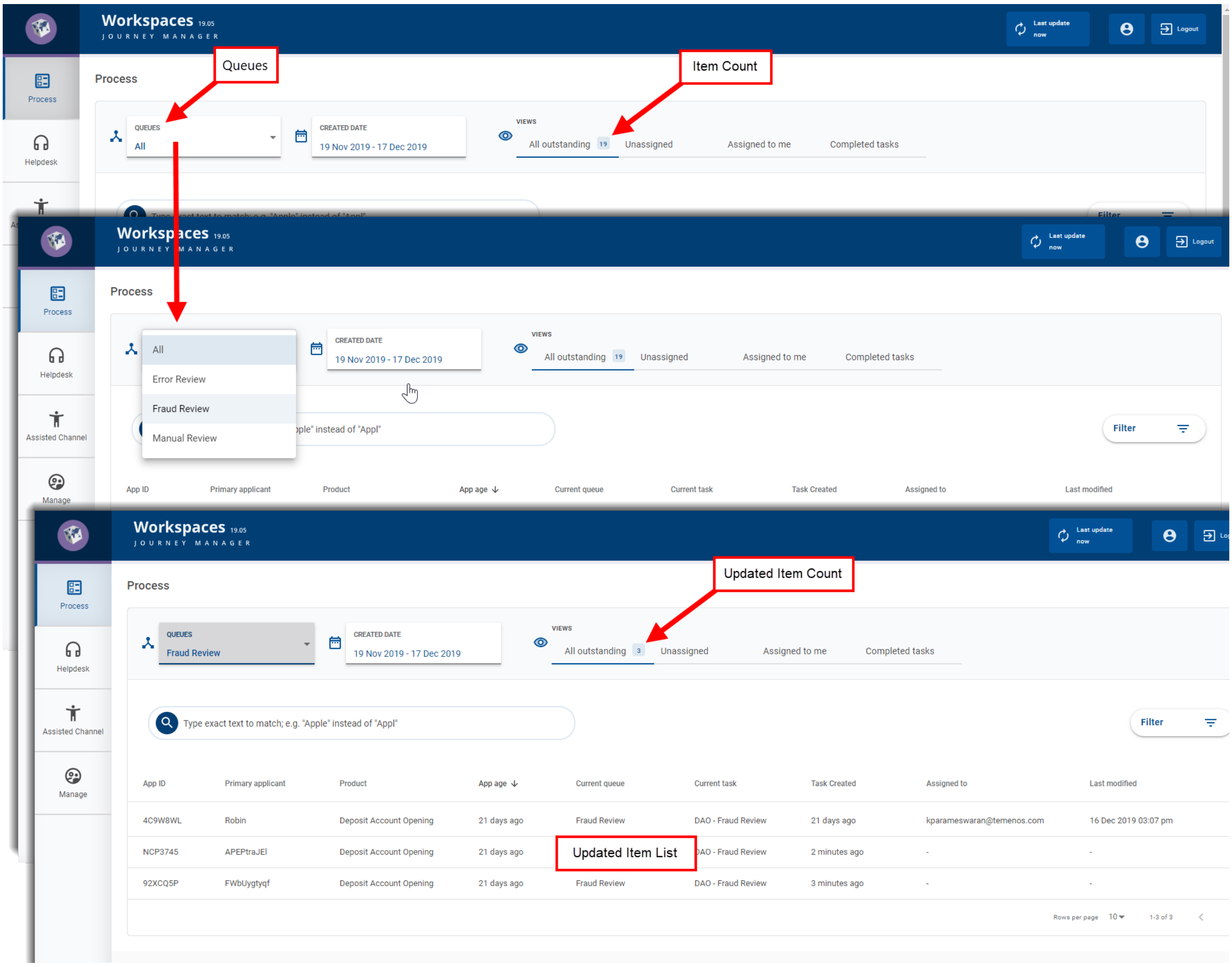
Queues

The default configuration of the Process space and Manage spaces in the Journey Workspaces portal includes a default queue selection. A **queue** acts as the source of tasks for populating the item list. The default setting is selected automatically when the List page is displayed causing various screen elements to be updated, and reflecting the tasks that are now available for the selected queue; for example, the number of tasks available in the queue and the items in the item list.

You may have access to more than one queue. If you do, you can select a queue to see a different set of tasks. When you select a queue, the item list on the List page is updated to show tasks that are available in the selected queue, and the item count is updated accordingly.

20.05 and later   Prior to 20.05


Item Count
Queues
Updated Item Count
Updated Item List

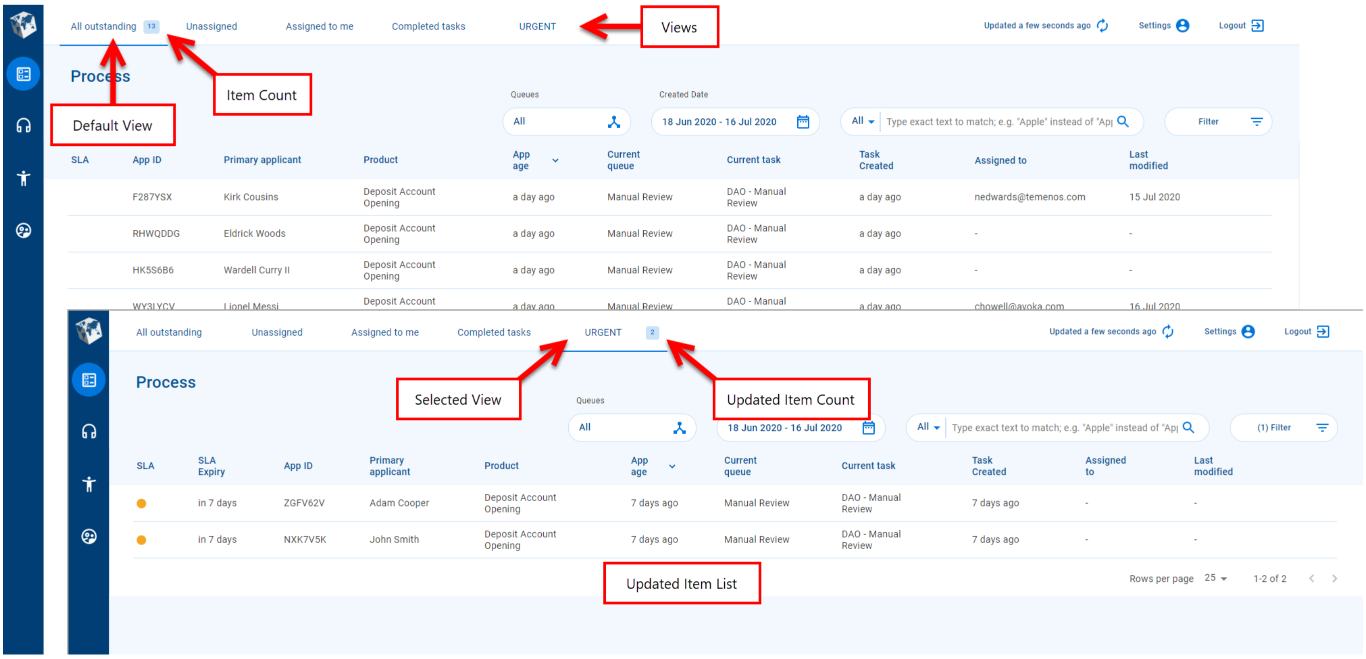


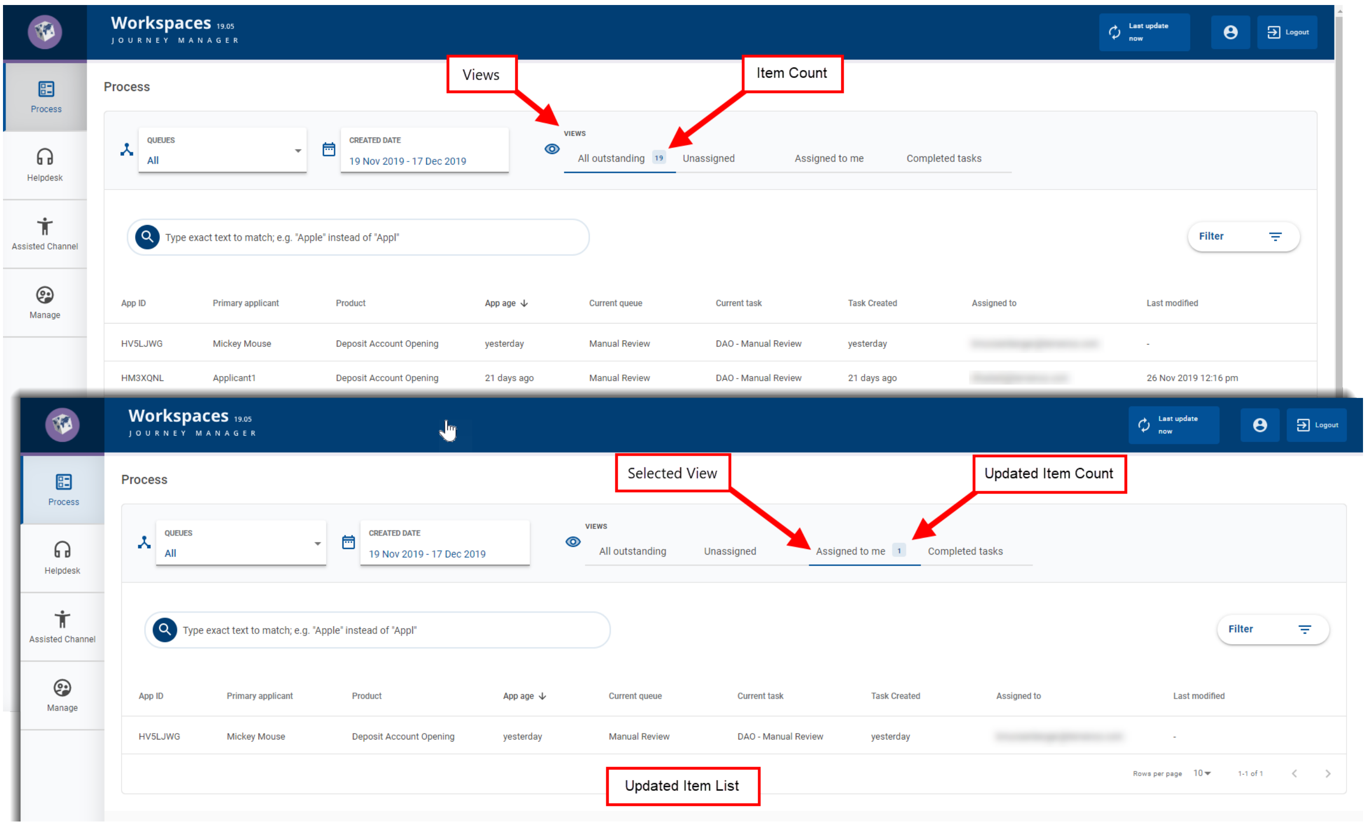
Views

The default configuration of each Journey Workspaces space includes a default view selection. A **view** applies a pre-defined set of field selections and filter and sort options to the item list. These default settings are selected automatically when a List page is displayed causing various screen elements to be updated, and reflecting the tasks that are now available for the selected view.

You may have several views to choose from. When you select a view, the item list on the List page is updated to show items that meet the filter and sort criteria defined for the selected view, and the item count is updated accordingly.

20.05 and later   Prior to 20.05





Access Control

Your Journey Workspaces portal imposes various restrictions that constrain your access to Workspaces features and elements such as spaces, queues, tasks and applications, and the portal itself. Your access to Workspaces features is enabled through and determined by configuration. If there are features that you need to use but you don't have access to them, contact your Workspaces administrator.

Workspaces is accessible to authenticated users only. To access your Workspaces portal, login using your Workspaces username and password which your Workspaces administrator can provide to you. Once you have logged in, you can interact with the features and elements that you have been given access to, such as selecting a space to work in or selecting a queue from a list of queues.

The spaces you can access also control which features are available to you. For example, if you have access to the Process space or Manage spaces, you can select a queue which gives you access to the specific tasks on that queue. Then, the tasks or applications you can access and their current state determine what actions you can take. For more information about when various actions are available, see Workspaces Actions.

Workspaces UI Tour

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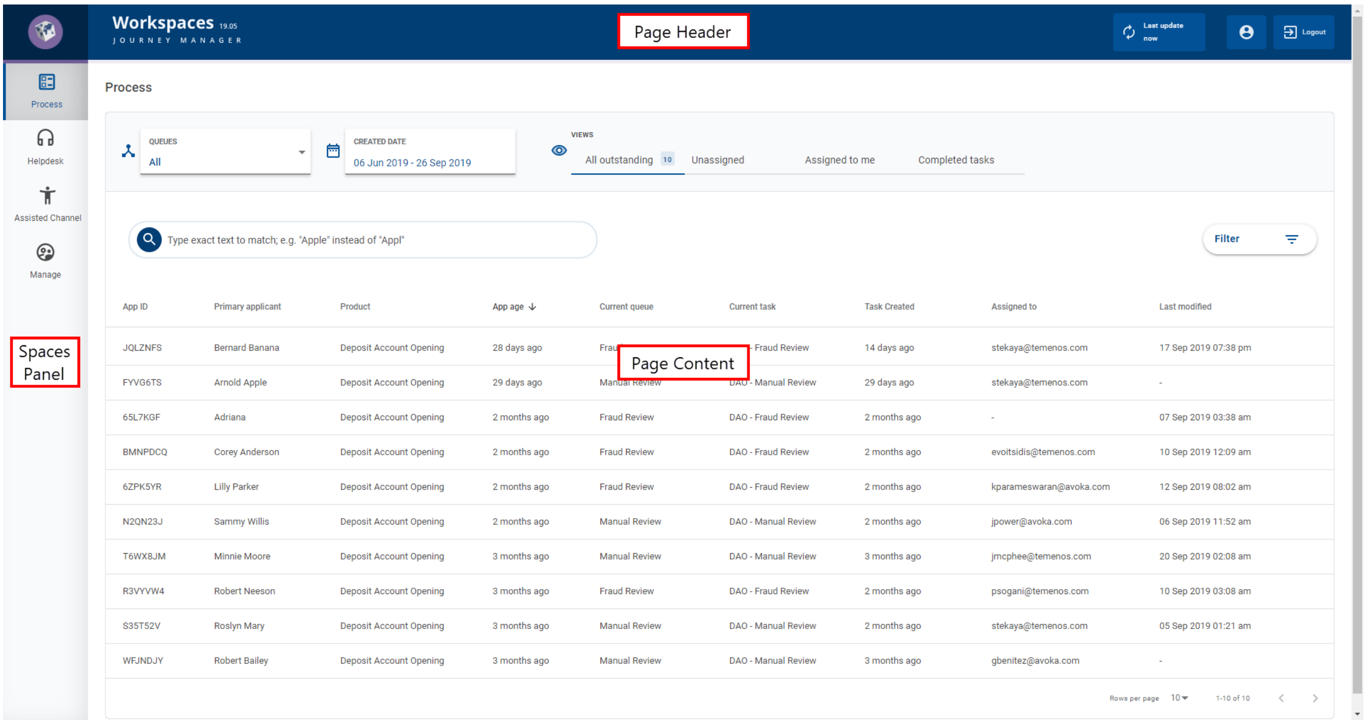
Workspaces is designed to give you a great user experience right from the start with a consistent page structure and common user interface elements. Let's take a look at some of the common elements that make up the Workspaces user interface (UI).

- Page Header
- Spaces Panel
- Page Content (list or details)
- Modal Windows | 19.11

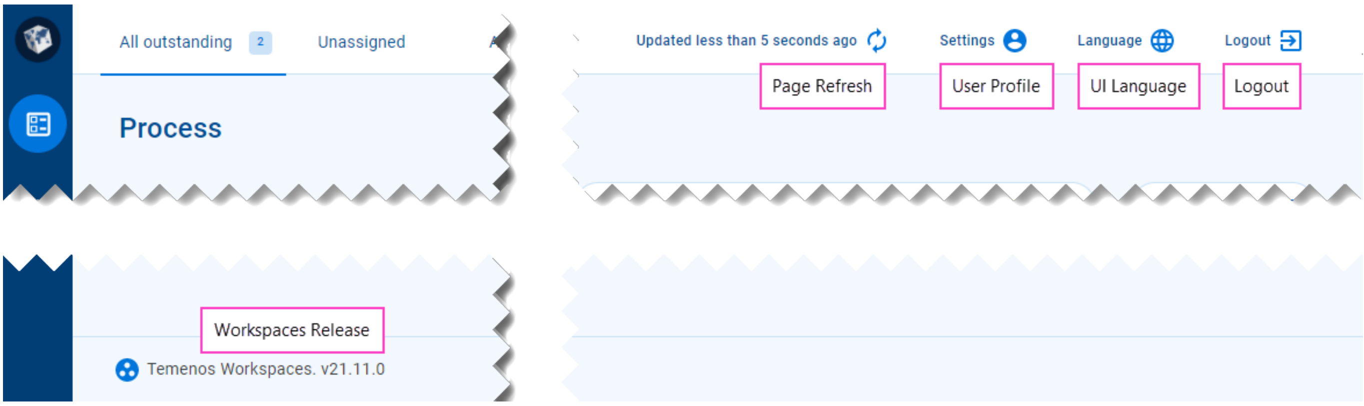


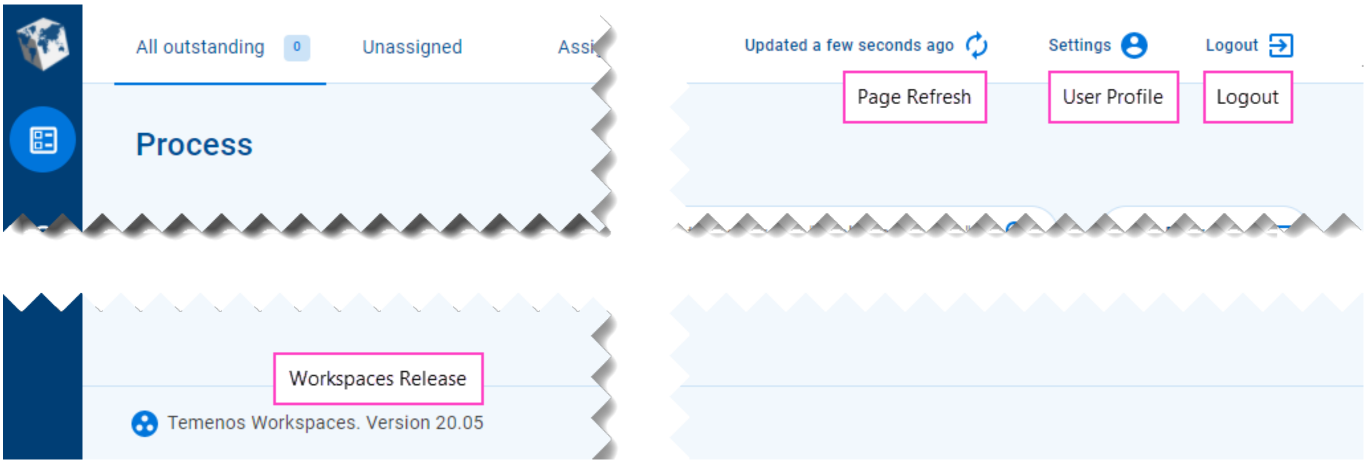
The page header and Spaces panel provide common functionality applicable to all Workspaces pages, while the page content presents content and options specific to the space selected from the Spaces panel and the page type (list or detail).

Page Header

The page header is common to all Workspaces screens, displaying generic information and providing access to common features and menus.

21.11 20.05 Prior to 20.05





On the page header, you can find the following features.

- When the displayed information was last refreshed, and an option to refresh the displayed information.
- A menu button providing access to User Profile options.
- An option to select the language used for static text in the Workspaces UI. | 21.11
- An option to log out of your current Workspaces session.

Workspaces 21.11 introduced an automatic session logout after a defined period of inactivity. To learn more about configuring the session timeout period, see Session Timeout.

Workspaces releases prior to 20.05 also display the release version number in the header, while this has moved to the page footer in subsequent releases.

When you navigate to a Workspaces screen, the information displayed is up-to-date but it can become stale over time. The elapsed time since the screen was last updated is shown in the page header on the **Page Refresh** button. If the screen has not been updated recently or you want to see the latest information, click **Page Refresh** to update it.

To access the User Profile settings, click the **User Profile** button (1) and select **Settings** (2). Update your profile settings as required (3) and click **Save** (4), then close the profile window (5). A message confirming your profile update was successful is displayed in the bottom left corner of the main window (6). You can close the message (7) or wait for it to go away after a few seconds.

Spaces Panel

The Spaces panel shows all the spaces that you can access and provides a way for you to move between them. Select an item in the Spaces panel to switch to a different space. One or more of the following spaces are available to you depending on how your Workspaces portal is configured and which permissions you have been given.

- **Process** - For processing staff, offering review capabilities for pending applications that need manual action.
- **Helpdesk** - For helpdesk staff, to find applications quickly and easily so they can provide prompt and accurate customer assistance.
- **Assisted Channel** - For relationship managers, to kick start the application process on behalf of customers and monitor application progress.
- **Manage** - For managers and supervisors, providing task management capabilities.
- **Applicant** - Allows applicants and their representatives to interact with applications through to completion.

For more information about spaces, see Roles and Spaces.

Page Content

This area is where the main action happens and is usually occupied by an item list (on a List page) or application details (on a Details page). The default configuration defines a List page and a Details page for each space. The List pages are based on a common layout and can be modified as required through configuration; for more information about List pages, see Understanding the Workspaces List Page. Similarly, the Details page for each space is based on a configurable common layout; for more information about Details pages, see Application Details Page.

Field Data Types

Fields display information of various data types including text (name, email address, some IDs), numbers (phone, SSN), and dates. A date may represent either a specific point in time (date of birth) or a duration (application age).

Numbers and dates can be configured to use a variety of formats. For example:

- Phone numbers can be formatted for the current locality or to accommodate internationalization.
- 9-digit Social Security Numbers are commonly displayed using the format "AAA-GG-SSSS".
- Dates representing a point in time can use either absolute ("1 Jan 2022", "today") or relative ("last Wednesday", "6 days ago") formats.
- Dates representing a duration can use either specific ("7 days, 3 hours, 26 minutes") or approximate ("about 7 days", "last week") formats.

Sometimes a value might be too long to fit in the space available for it; in this case, the value is often truncated and an ellipsis ('...') is appended to indicate that you're not looking at the full value. To see the full value, point your cursor at the truncated value and a tool tip is displayed showing the full value.

By default, values in table columns wrap when they are wider than the column. However, sometimes this behavior is undesirable, and it can be overridden for specific columns via configuration.

Modal Windows | 19.11

Workspaces has been purposefully designed to make key features and important information available at your fingertips. However, sometimes more screen space is needed, or an action needs more control over how it's used, and in these kinds of circumstances Workspaces uses a modal window.

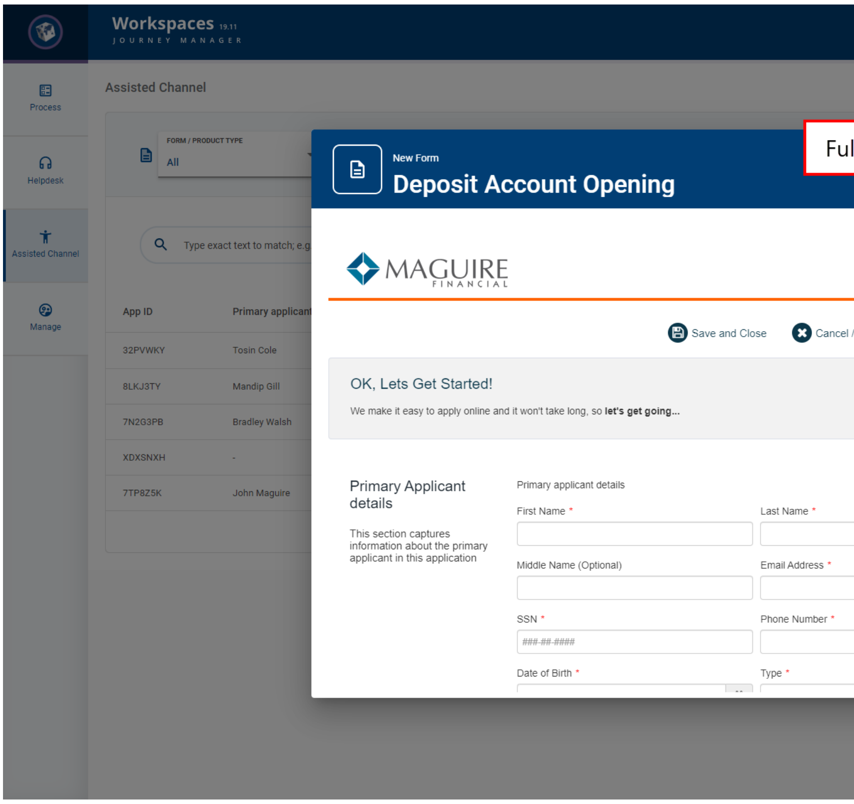
Here are some examples where Workspaces uses modal windows.

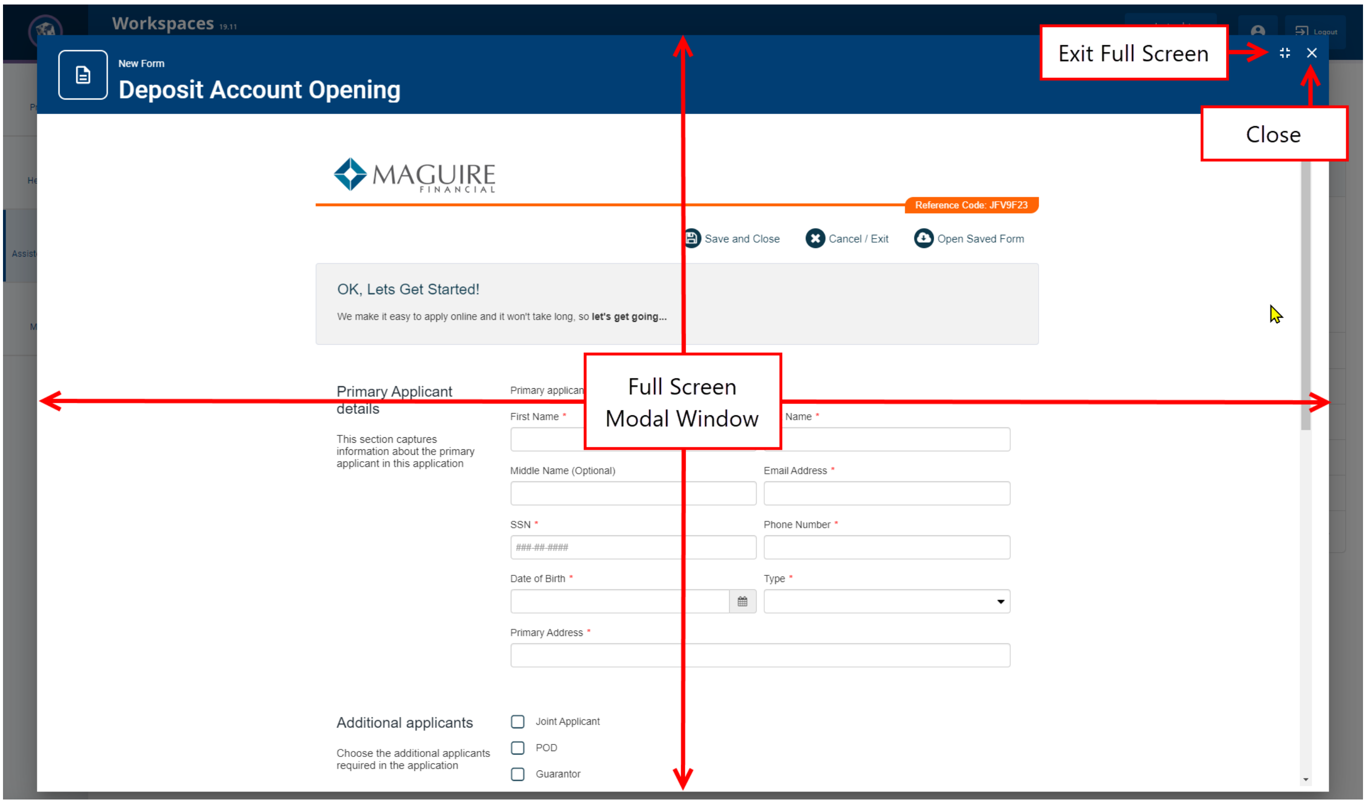
- **Managing the documents attached to an application** – Workspaces opens a modal window presenting all the document management options.
- **Starting a new form in the Assisted Channel space** – Workspaces opens a modal window showing the form for you to fill in and save or submit.

When a modal window is open, Workspaces prevents you from interacting with the main Workspaces screen behind it. This can help you to focus on the action at hand which may or may not be a part of your application processing workflow. You can interact with the elements on the modal window which may involve data entry, or the window may simply display information in a format that wouldn't be possible or might not present well on the main Workspaces pages.

You can control the size of a modal window using the (Full Screen) and (Exit Full Screen) icons. When you're finished with a modal window, click the (Close) icon to close the modal window and return to the Workspaces screen where the modal window was opened. The screen is reloaded to reflect any changes made while the modal window was displayed.

Modal Window Modal Window - Full Screen





Time Zones in Workspaces

When you're using Workspaces, from time to time you'll encounter dates and times associated with items such as applications and tasks; for example, the date and time when an application was submitted or a note was added. Workspaces captures and stores dates and times using the time zone on the local computer where the action is taking place. Similarly, all dates and times displayed in Workspaces are with respect to the time zone of the user's local computer. This means that you never need to do time zone conversions; Workspaces always takes care of this for you.

Understanding the Workspaces List Page

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Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

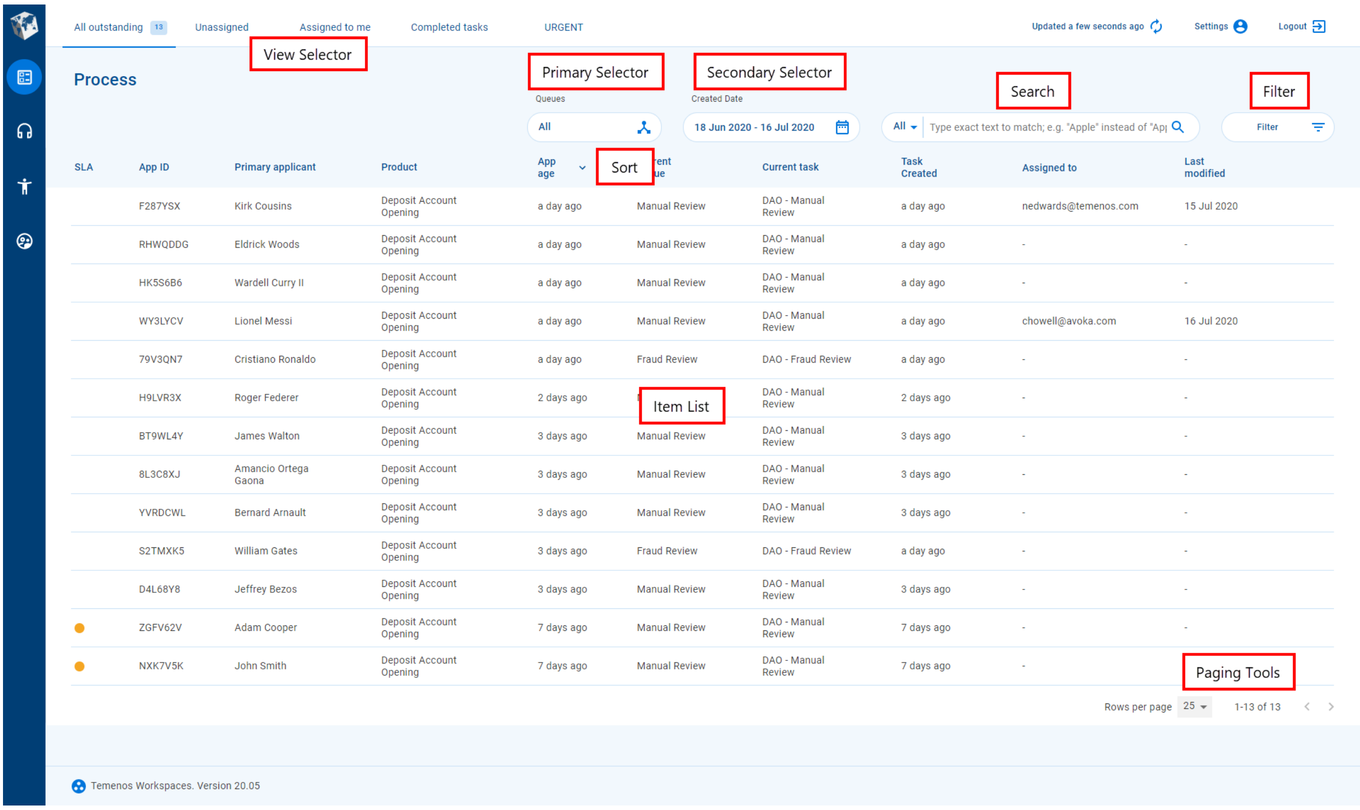
Overview

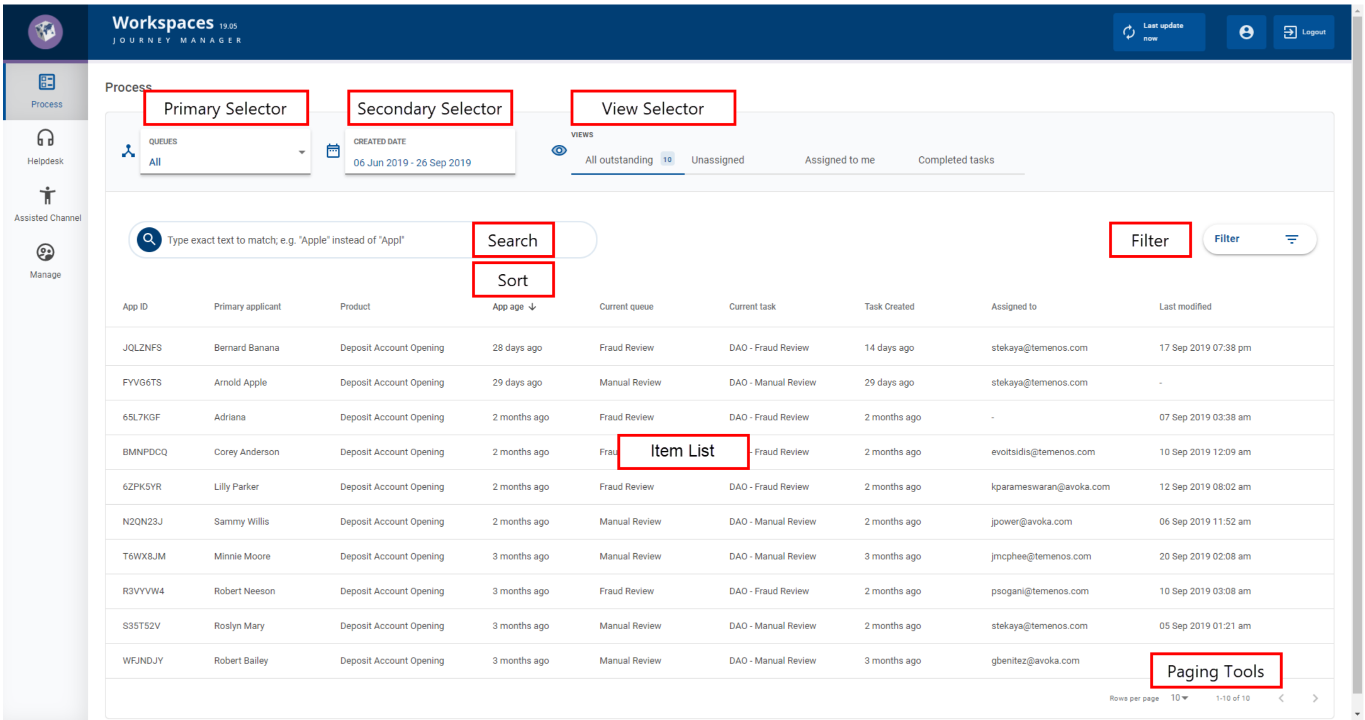
Each space in a Workspaces portal is configured with a List page that displays a list of active application or task items, and a set of actions that you can use to work with a selected item. Each List page is configured with a set of common features that allow you to control which items are displayed in the list, including the following.

- An item list.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11
- A second global filter, Created Date, that restricts the in the item list based on the date they were created.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- Flexible search, filter and sort options that you can use to refine the set of in the item list.
- Paging tools that you can use to browse the item list.

The following image illustrates where you can find the common features on the List page using the Process space as an example.

20.05 and later Prior to 20.05





The List pages for the Process and Manage spaces are configured with similar functionality, while those for the Helpdesk and Assisted Channel spaces have some different behavior. The most significant difference is how the item list is populated for each space, but there are other differences such as the SLA column on the Process and Manage spaces.

The main element on the List page is the item list which displays summary information for a list of tasks- or applications. The selectors at the top of the page, for the global filters and view, are the main way you control and identify which tasks are displayed in the item list. Up to three global filters may be configured but the default configuration has just two.

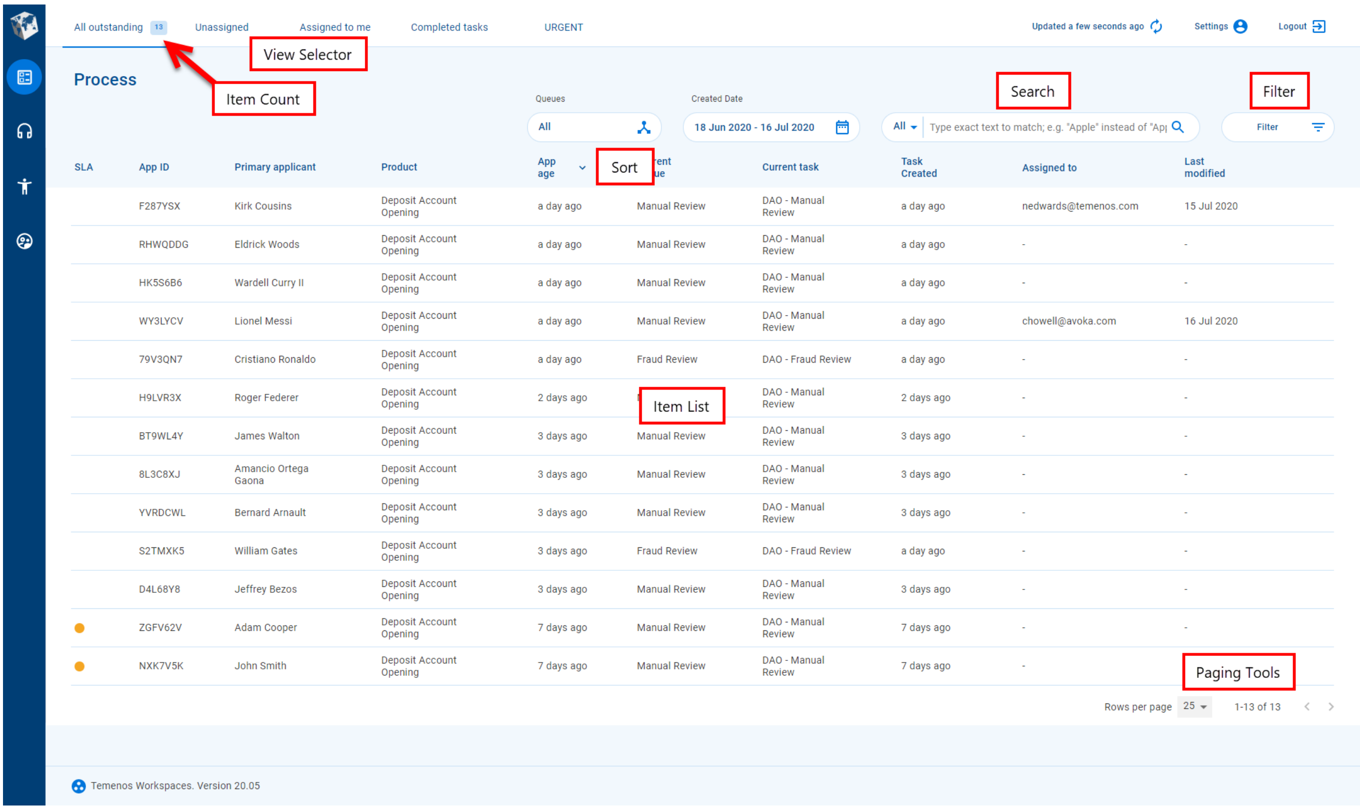
- The first global filter shows the name of the active queue (**Process** and **Manage** spaces) or form / product type (**Helpdesk** and **Assisted Channel** spaces), and lets you select another queue or form / product type so that you can work with other tasks or applications.
- The **Created Date**global filter lets you hone in on items created in a specific period, and displays the date or date range that is currently selected.
- The **View selector** shows the name of the current view, and lets you select another view, thereby quickly and easily changing how the item list appears (including different fields or sort order) and which items are displayed.

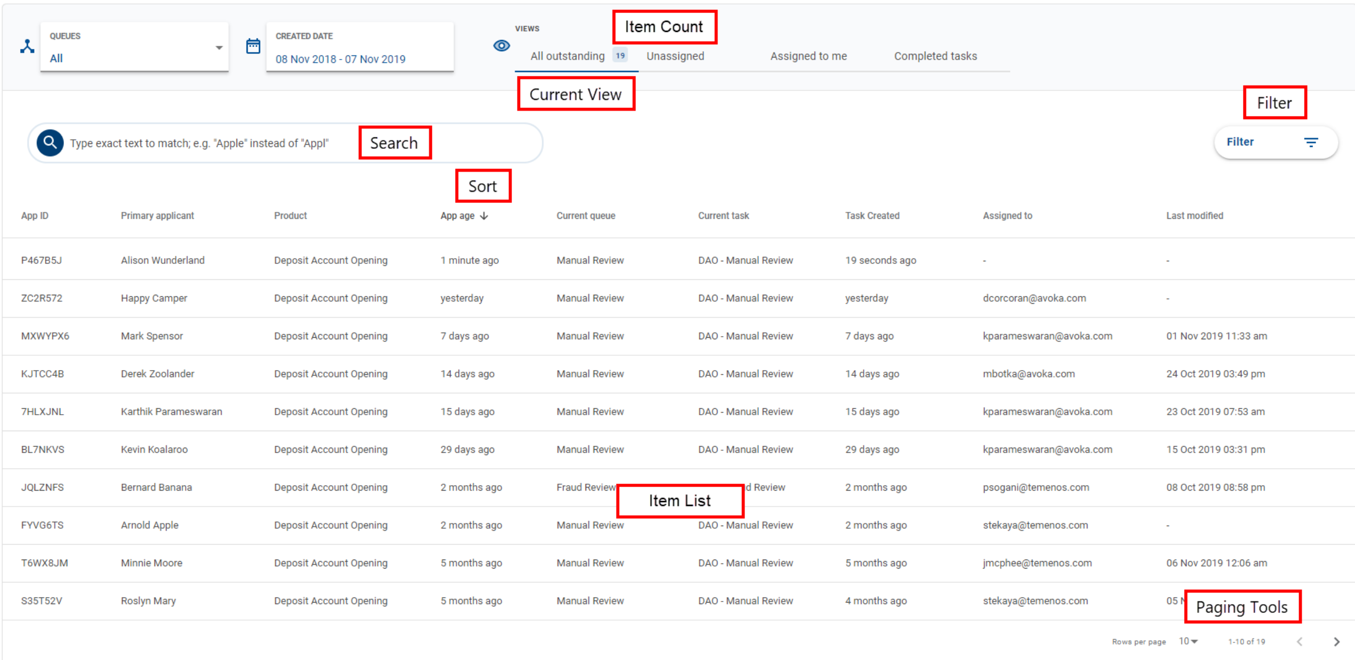
If you've selected global filters and a view, and you can't see the item you're looking for, you can further refine the list of items using the filter and sort options. Filtering restricts which items are displayed in the item list, and sorting determines the order items appear in the list. To learn more about these options, see Filter the item list and Sort the item list.

Sometimes, you just need to find a specific task or application quickly, or you can't see it in the item list using the techniques described above. In these kinds of situations, you can search for the item to find it straight away (or not at all). To learn how to search, see Search for Tasks.

Other times, you might not be sure which task or application you need until you see it, so after using the selectors and filters you want to browse through the item list until you find what you need. Workspacesincludes a set of paging tools that allow you to browse the item list and which also allow you to choose how many items are displayed on a page.

20.05 and later Prior to 20.05

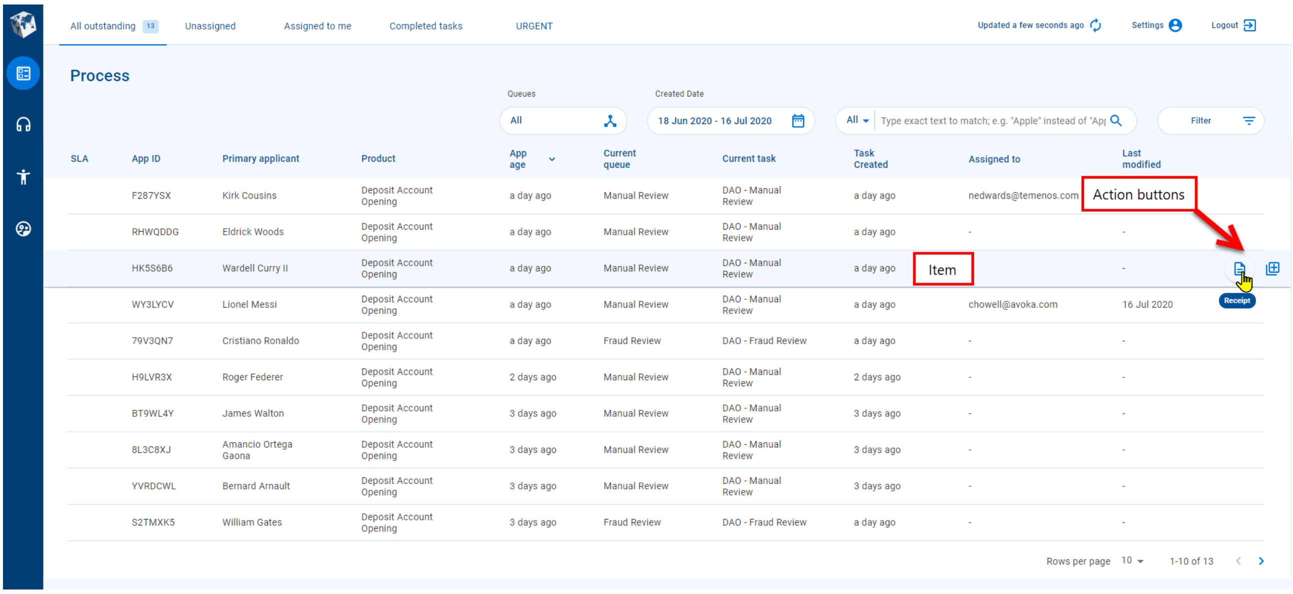




The number of items that satisfy all criteria for selection is shown as the Item Count next to the view name. The global filters, current view, search and filters all contribute to the calculation of the Item Count.

Once you've found the task or application that you're looking for, there are two ways you can interact with it on the List page.

- Point your cursor at an item to reveal one or more action buttons on the right. Click an action button to perform the corresponding action.



- Click an item to open it in the current space's Application Details page where you can see more information about the application and interact with it further, including to perform actions. To learn more about working with tasks and applications on the Details page, see Application Details Page.

The available actions for a task or application item depend on the currently selected space and the item’s current state. The Receipt action is always available for a submitted application and similarly the View Form for saved applications, allowing you to see the information entered by the applicant. To learn about actions including Receipt and View Form, see Workspaces Actions.

Some actions may only be available from the Details page. If you think an action should be available but can't see it in the item list, try selecting the item and check if the action is available on the Details page.

Item List

The main element on the List page is the item list, a tabular display of task- or application-related information in rows and columns. Each row of the item list corresponds to a single item (task or application), and displays brief information for the item that helps you to identify the items you're interested in. The kind of information displayed in each column is configurable, so your Workspaces portal may differ from the default configuration.

The items displayed in the item list satisfy a set of criteria selected by the user starting with selections from the global filters and views, then refined by searching and filtering. Items appear in the item list if they:

- Are tasks sourced from the active queue, or applications that correspond to the value of the form / product typeglobal filter; and
- Were created on one of the dates selected in the **Created Date**global filter; and
- Match the filter criteria imposed by the current view; and
- Match any optional search or filter criteria selected by the user.

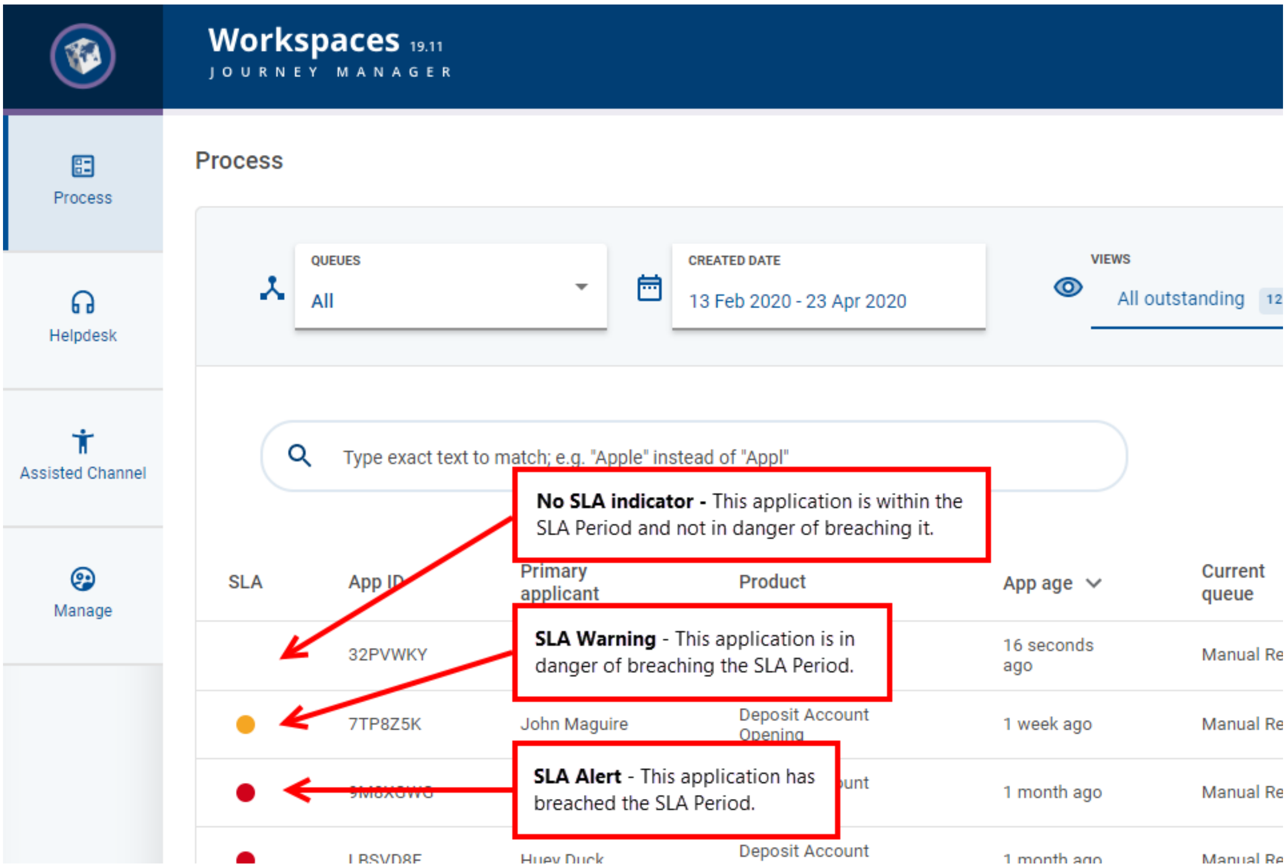
Note that the last three criteria (**Created Date**, view, and optional filter/search) are the same for all spaces in the default configuration. This means we can simplify the description of which items appear in the item list by focusing on how the item list is populated initially for each space in the default configuration before applying the common criteria. This leads to the following:

- In the **Process** and **Manage** spaces, the item list is populated with tasks for submitted applications sourced from the active queue, and that satisfy the common criteria.
- In the **Helpdesk** space, the item list is empty initially; search for an application ID to populate the item list with saved or submitted applications that match the selected form / product type, and that satisfy the common criteria.
- In the **Assisted Channel** space, the item list is populated with saved or submitted applications matching the selected form / product type that were created by or are assigned to the logged-in user, and that satisfy the common criteria.

SLA Indicator | 19.11

While the SLA Indicator is available in the default configuration of Workspaces, it may not be available in your Workspaces portal or it may appear differently depending upon how your Workspaces portal has been configured.

In the Process and Manage spaces, Workspaces enables you to monitor the progress of each submitted application against a crucial service indicator, such as an SLA, via a graphical indicator in the item list. A red disc (SLA Alert) indicates that the SLA has been breached, while an amber disc (SLA Warning) indicates that an SLA breach is imminent. If no indicator is displayed, the application is still being processed within the SLA period and not in imminent danger of breaching the SLA.



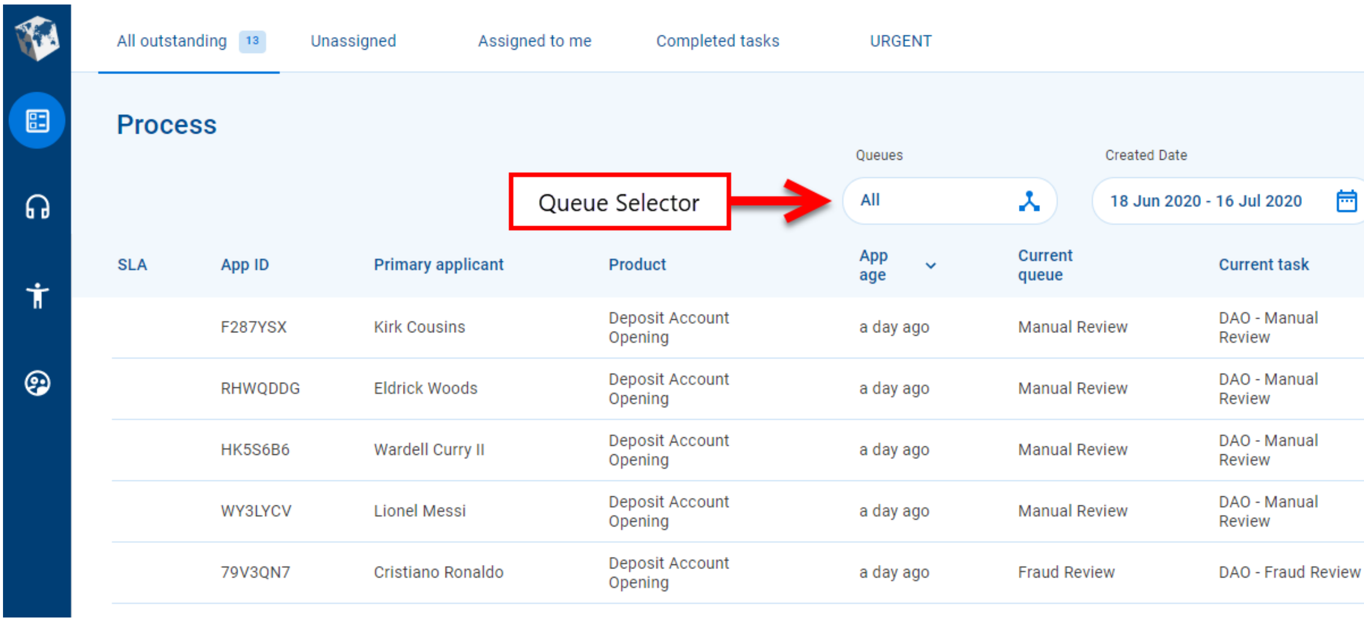
A text version of the SLA indicator is available on the Details page, showing how processing of the application is progressing relative to the SLA.

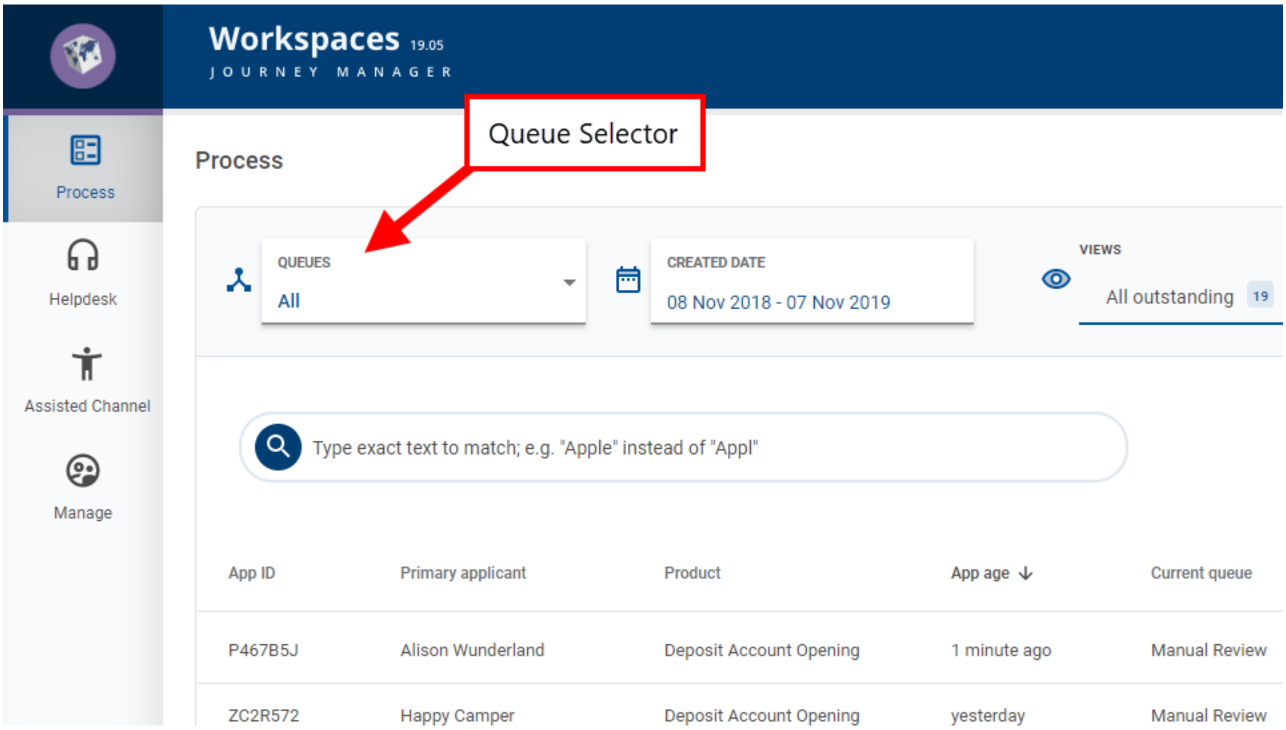
Queue Selector

In the Process and Manage spaces, the List page allows you to interact with tasks from any queue that you can access. The **Queues** selector identifies which queue is currently used as the source for populating the item list. You can select another queue from the **Queues** selector if more than one queue is available to you.

The default Workspaces configuration makes the **Queues** selector available in the Process and Manage spaces only.

20.05 and later Prior to 20.05





In the Process and Manage spaces, when the List page is first displayed, a default queue is selected for you and tasks from that queue are displayed in the item list. If no queue is selected, the item list is empty and you need to choose a queue. Thereafter, Workspaces remembers the last queue you chose, and selects it automatically when you open the List page.

The available queues are listed in the **Queues** selector's dropdown list as well as an **All** item. You can choose any queue from the dropdown list to be the source of tasks for populating the item list. If you choose **All**, the item list is populated with tasks from all of the queues available to you.

Selecting the **All** queues item populates the item list with tasks from all of the queues that you can access. There may be tasks on other queues that you cannot access; these tasks are not displayed in the item list when the **All** queues item is selected.

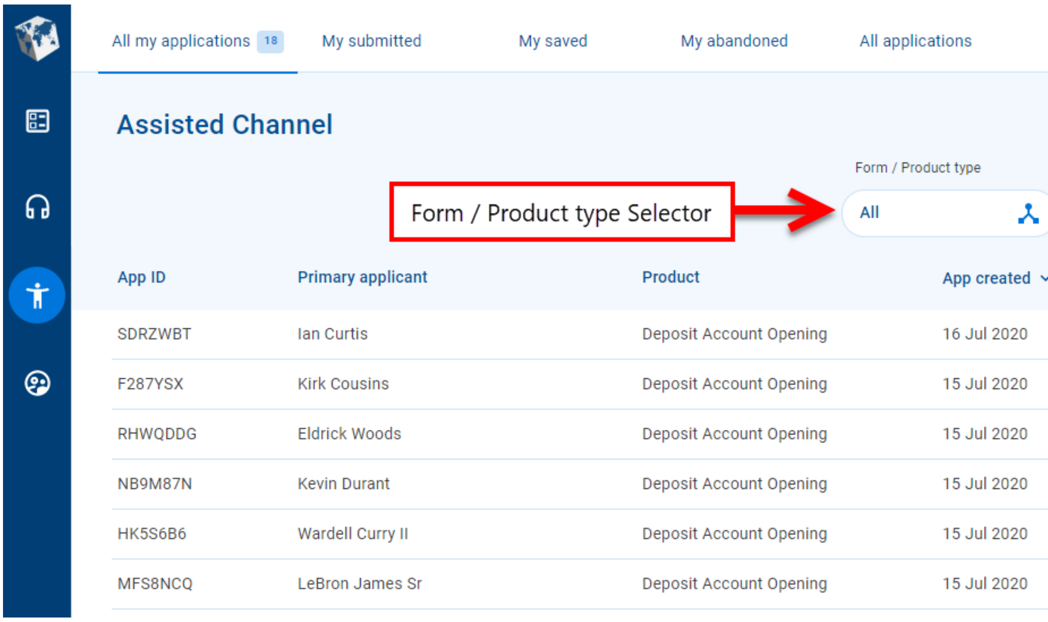
Form / Product Type Selector

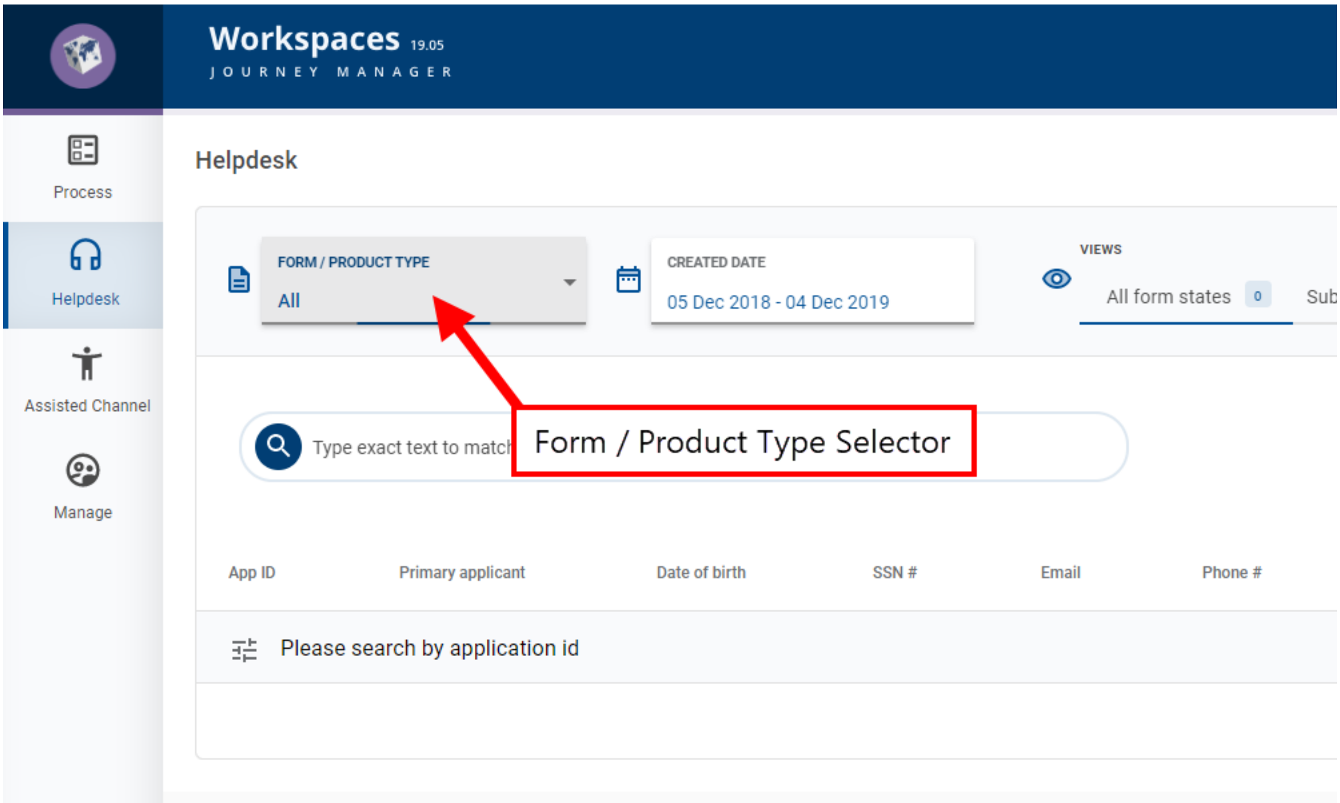
As mentioned above, the first global filter applied to the List page in the Helpdesk and Assisted Channel spaces is for a form / product type. The **Form / Product Type** selector identifies the currently selected form / product type, and allows you to select another form / product type to apply as a global filter on the item list.

The default Workspaces configuration makes the **Form / Product Type** selector available in the Helpdesk and Assisted Channel spaces only.

20.05 and later

Prior to 20.05





The **Form / Product Type** selector behaves differently to the **Queues** selector. Rather than selecting the source of tasks to be displayed in the item list, the **Form / Product Type** selector restricts the applications displayed by including only those that match the selected form / product type. This has a different affect in each space due to the way the item list is populated in each space.

- In the Helpdesk space, the form / product typeglobal filter is used in conjunction with a search for an application ID to populate the item list with applications that match the selected form / product type.
- In the Assisted Channel space, the form / product typeglobal filter restricts the applications displayed in the item list to just those that were created by or are assigned to the logged-in user and which match the selected form / product type.

When the List page is first displayed, a default form / product type is selected for you. Thereafter, Workspaces remembers the last form / product type you chose and selects it automatically when you open the List page again.

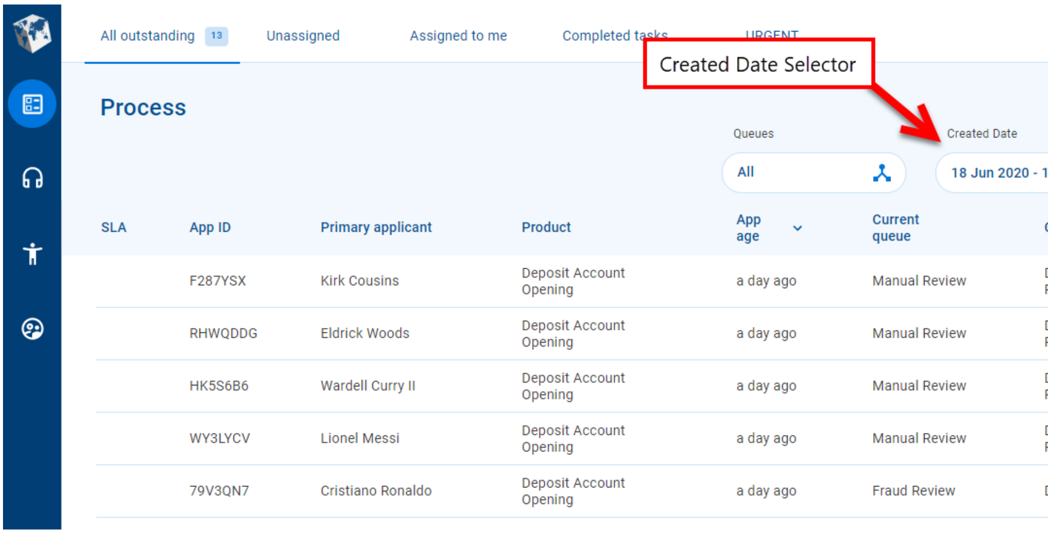
The available form / product type values are listed in the **Form / Product Type** selector's dropdown list as well as an **All** item. You can choose any form / product type from the dropdown list to be applied to the item list. If you choose **All**, the item list is populated with applications for all form / product types that you can access.

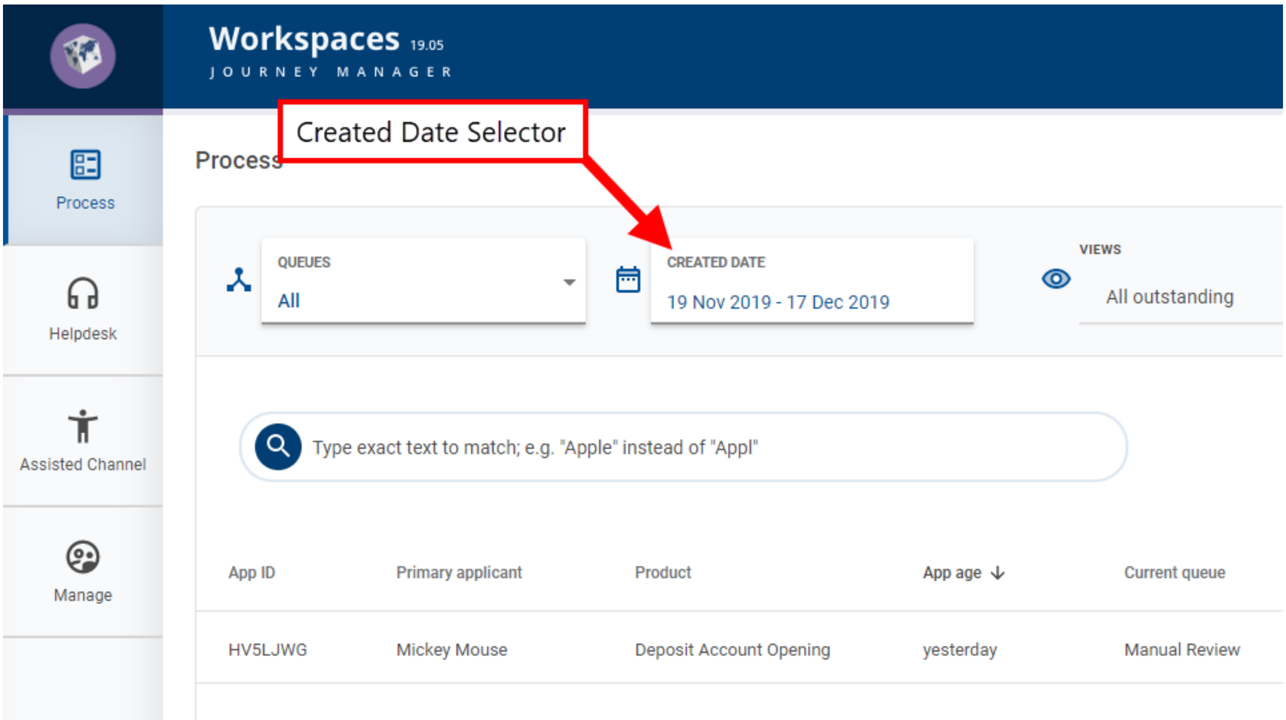
Created Date Selector

Another feature on the List page that helps to reduce the number of items presented to you is the creation date global filter. You can access this global filter via the **Created Date** selector which displays the current creation date filter and lets you apply a different creation date filter.

20.05 and later

Prior to 20.05



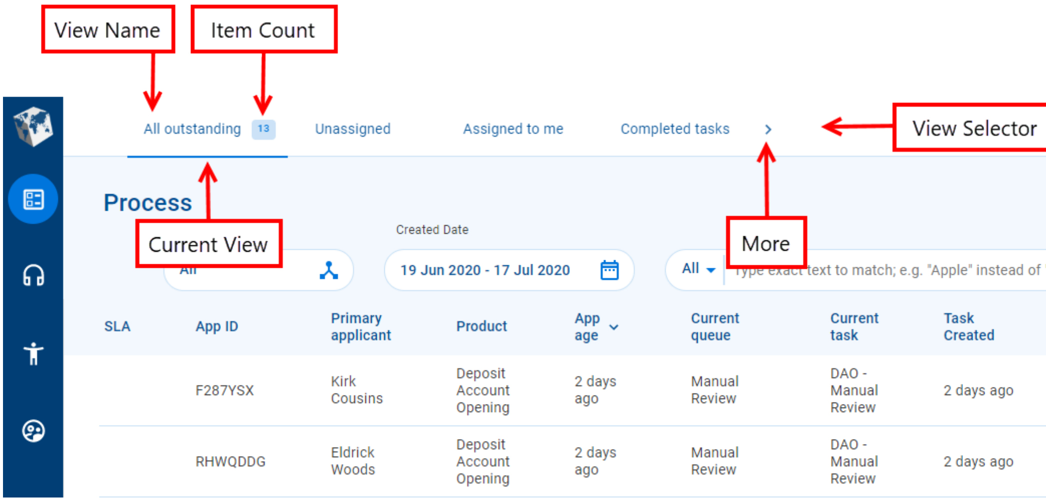


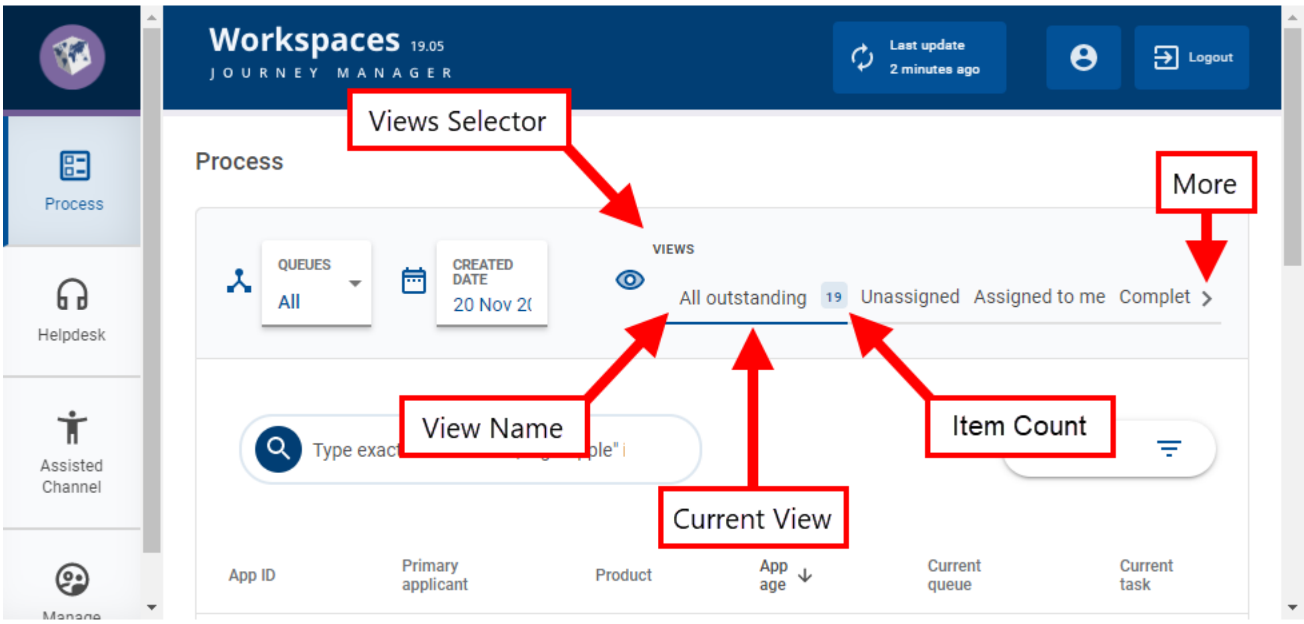
The default creation date filter restricts the tasks or applications displayed in the item list to just those that were created in the last 30 days, including the current date, and this filter is applied the first time you access the List page. You can select a different creation date filter using the **Created Date** selector. When you click the **Created Date** selector, a date picker is displayed allowing you to choose a date or range of dates so that you only see tasks or applications created on the selected dates. To learn more about how to use the date picker, see Finding Tasks and Applications.

View Selector

The **View selector** provides a convenient way to control which items are displayed in the item list. You can restrict the items you see by selecting one of the views in the **View selector**.

20.05 and later Prior to 20.05





A view is a predefined item list configuration including fields, filters, and sort options. When a view is selected, it's configuration is applied to the item list to restrict the items displayed. You can think of a view as a shortcut for applying a set of filter and sort options on top of a defined set of fields.

Each item in the **View selector** represents a view. Click an item in the **View selector** to make it the current view and apply its configuration to the item list. Color highlighting and an item count provide a visual indication of which view is selected.

If there's not enough screen space to display all the configured views, left/right scroll buttons will appear to allow you to access all the views. The **Scroll Left** button appears if the first view item is not entirely visible. Similarly, the **Scroll Right** icon appears if the last view item is not entirely visible.

Views are configured by a Workspaces developer or administrator. As a Workspaces user, you can't change the way a view is defined but you can use filter and sort options to refine the items displayed in the item list.

Search, Filter and Sort

As mentioned above, the item list shows task or application items that satisfy the criteria defined by the global filters and the current view. This may result in a large number of items which you might want to further refine. Workspaces includes search, filter and sort options that can help you to focus on the tasks or applications that are important to you right now.

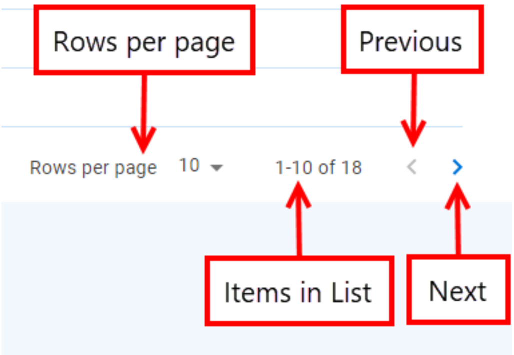
Search and filter are similar in that both reduce the number of items by matching values and fields. However, there are some key differences between these two features:

- Search looks at every field (column) in the item list (except date fields), whereas filter is targeted at specific fields.
- Search compares the same text to every field, whereas filter allows you to look for a different value in each field.
- Search is supported for text fields only, while filter is supported on all data types including text and dates.

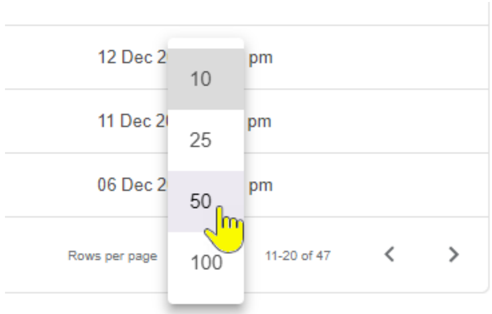
To learn more about the Workspaces options for search, filter and sort, see Finding Tasks and Applications.

Paging Tools

Paging tools allow you to choose the number of items to display on a page, and browse through pages if there are too many items to display on one page.



Rows per Page shows the maximum number of items displayed in the item list. You can choose a different page size from the Rows per Pagedropdown. When you choose a different page size, the item list resets to show you the first page again.



The **Previous Page** and **Next Page** tools allow you to browse through pages to find the tasks or applications you need to work with. Click these tools to fetch the previous or next page of items and display them in the item list. The Previous Page tool is disabled when the first page is displayed; similarly, the Next Page tool is disabled when the last page is displayed.

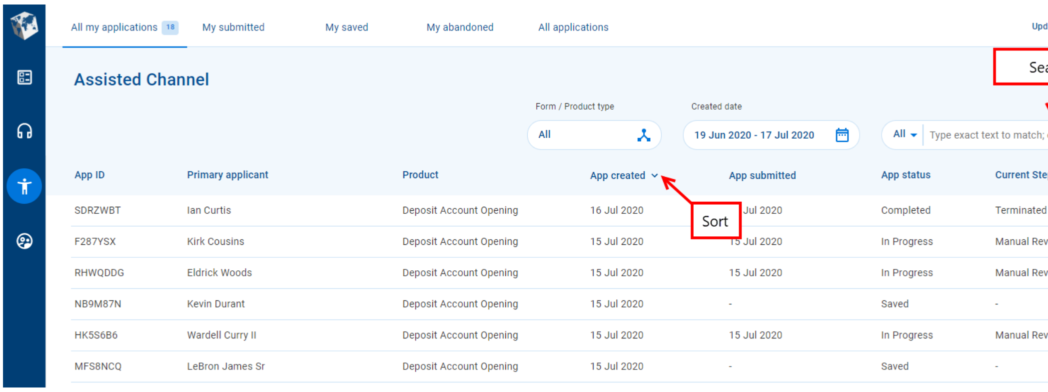
Finding Tasks and Applications

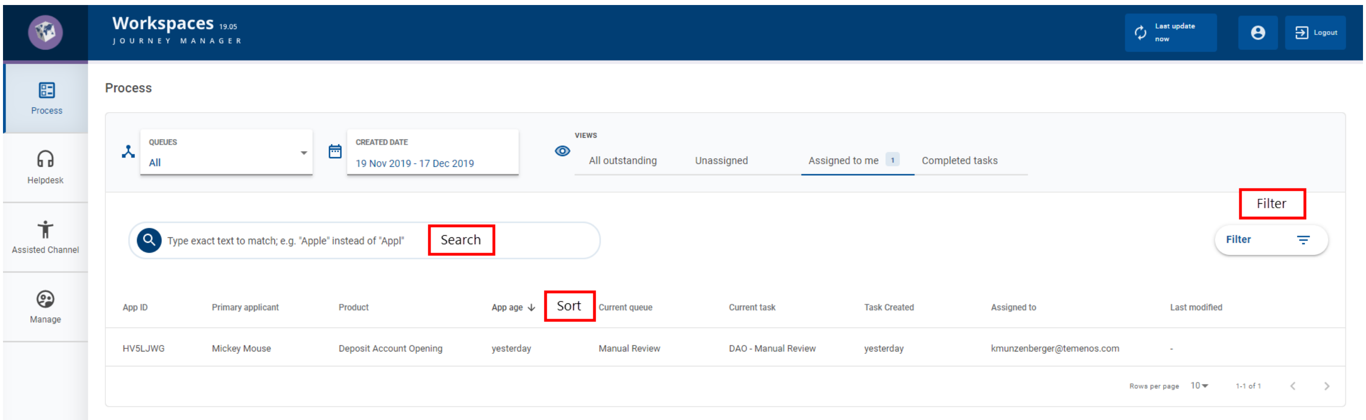
Workspaces | Workspaces User | 18.11 | 21.11

Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

The Workspaces item list shows tasks from the active task queue (Process and Manage spaces) or applications for a selected form / product type (Helpdesk or Assisted Channel spaces) that also satisfy the criteria defined for the current view. This may still result in a large number of tasks which you might want to refine further. Searching, filtering and sorting can help you to focus on the tasks or applications that are important to you right now.

20.05 and later Prior to 20.05





Searching and filtering are similar in that both reduce the number of items in the item list by matching desired field values. However, there are some key differences between searching and filtering:

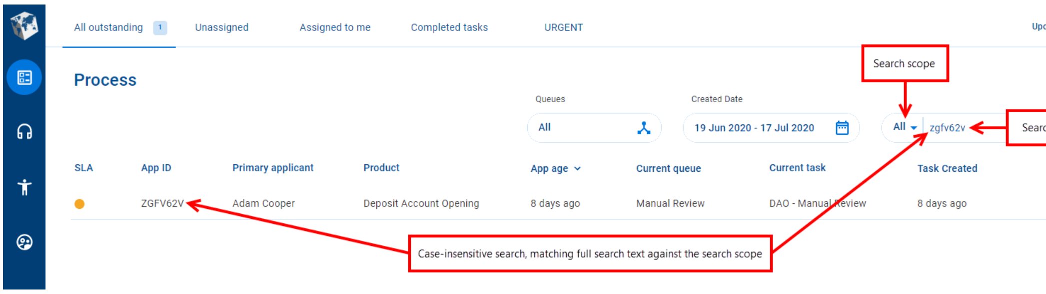
- Searching looks at every text field (column) in the item list, whereas filtering is targeted at specific fields.
- Searching compares the same text to every field, whereas filtering allows you to look for a different value in each field.
- Searching is supported for text fields only, whereas filtering is supported on several types of data including text and dates.

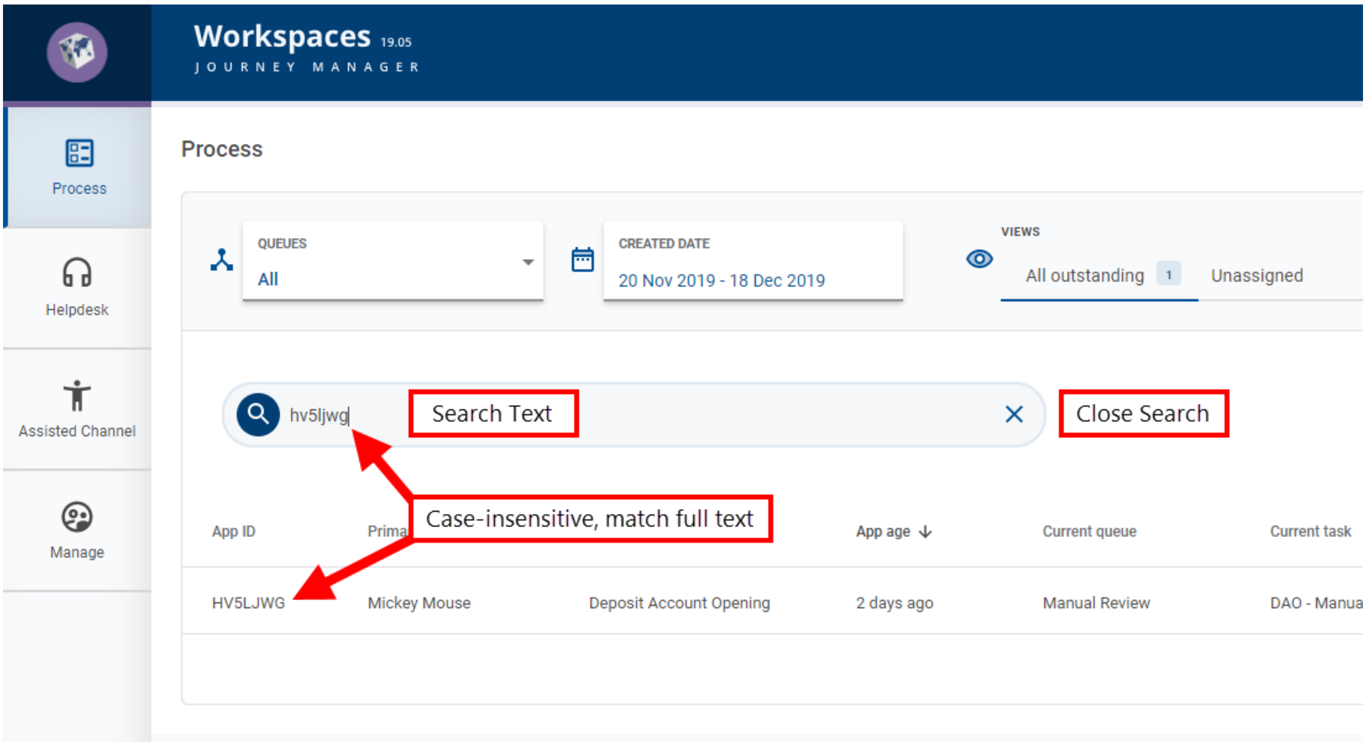
Search for a Task or Application

If you know which task or application you're looking for and you can't see it in the item list, you can try to search for it. Searching allows you to refine the list of items displayed to show just those relevant to what you are looking for.

20.05 and later

Prior to 20.05





To search for a task or application:

- **Workspaces 20.05 and later:** Select a search scope, type your search text, and press `Enter` or click (Search). Workspaces compares the search text against the field or fields in the search scope, and displays matching items in the item list. If the search scope is **All**, the search text is compared against all searchable fields.
- **Workspaces 19.11:** Type your search text in the (Search) field, and press `Enter`. Workspaces compares the search text against all the searchable fields in the item list, and restricts the items displayed to only those that have one or more fields matching the search text.
- **Workspaces 19.05 and earlier:** Click in the (Search) field and start typing. As you type, Workspaces compares the text you enter against all the searchable fields in the item list, and restricts the items displayed to only those that have one or more fields matching the text entered. If you pause while typing the search text, Workspaces will attempt to find items that match the text you have entered. Keep typing until you have entered the full text that you want to search for.

Here are some things to know about how searching works:

- Searching is case-insensitive; that is, it treats uppercase and lowercase characters as the same.
- Partial match is not currently supported, so searching only finds items that match the search text exactly (ignoring letter case).
- When a search is active, the items displayed in the item list satisfy the current view and filter selections as well as the search criteria.

A search remains active until you clear it. To clear a search:

- **Workspaces 20.05 and later:** Delete the search text, and click (Search) or press `Enter`.
- **Workspaces 19.11 and earlier:** Click (Clear Search), or select any space which re-loads the List page.

> Simply deleting all of the search text does not clear an active search. To clear a search, follow the instructions above for your Workspaces version.

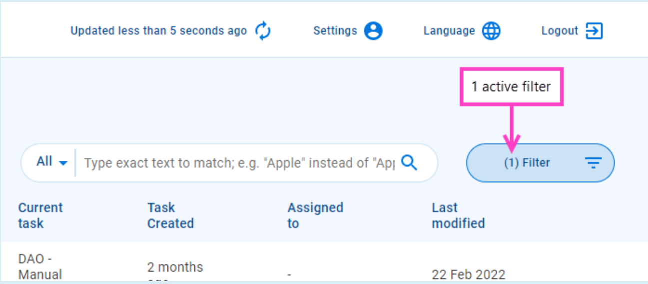
If you select an item in the item list while a search is active, when you subsequently return from the Details page to the List page, the search will still be active. This is indicated by the text and in the **Search** field.

Filter the Item List

If you're looking for something specific and there are too many items to scroll through, filters might help you to find what you're after. A filter restricts what appears in the item list so that items more relevant to what you are looking for right now are shown. Filters are applied to the item list using the Filters selector, however, a View can also include filters.

A filter is a requirement that must be satisfied for an item to appear in the item list. A filter requirement specifies one or more values to compare against a column in the item list, and all matching items satisfy the filter requirement. Multiple filters can be defined at the same time. Only items that satisfy all the active filters will appear in the item list.

If you select an item in the item list while a filter is active, when you subsequently return from the Details page to the List page, the filter is still active. This is indicated on the Filter button by a number in parentheses identifying how many filters are active.



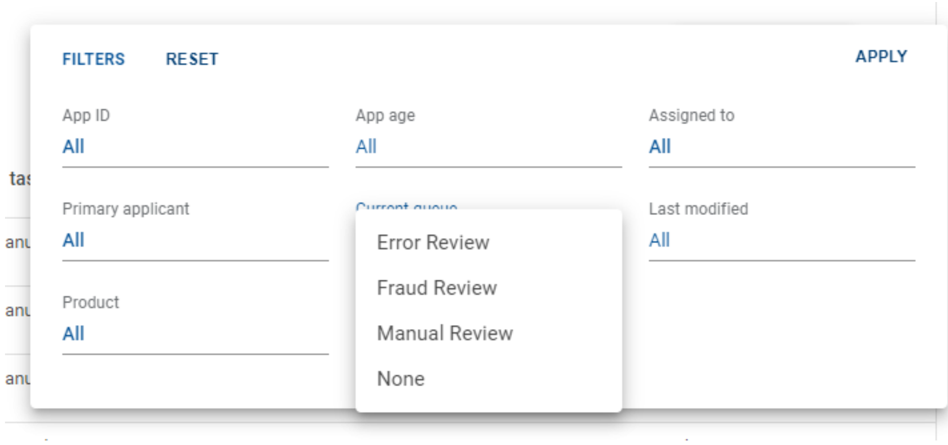
To view the current filters, click the (Filter) button. The Filters selector is displayed showing all the filters that are currently applied to the item list. Each filter allows you to select a value or set of values to compare against the column.

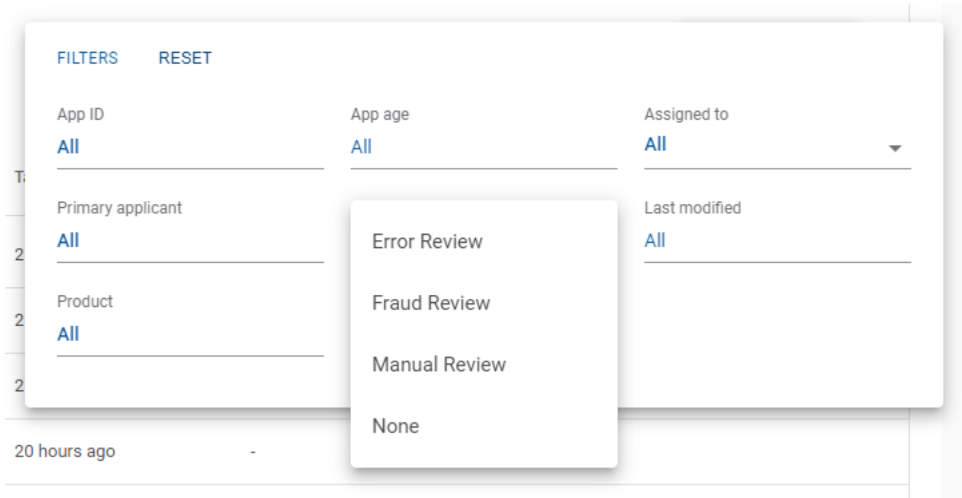
Workspaces supports several types of filter.

- **Single-select:** A single value selected from a predefined list of values.
- **Multi-select:** Multiple values selected from a predefined list of values.
- **Date:** A single date or a date range.
- **Text:** Similar to searching but applied to a single column.

When you click a single-select or multi-select filter field, a drop-down list appears populated with a predefined list of values. For a single-select filter, select a value from the dropdown list to filter on. For a multi-select filter, you can select one or more values from the dropdown list.

20.05 and later   Prior to 20.05

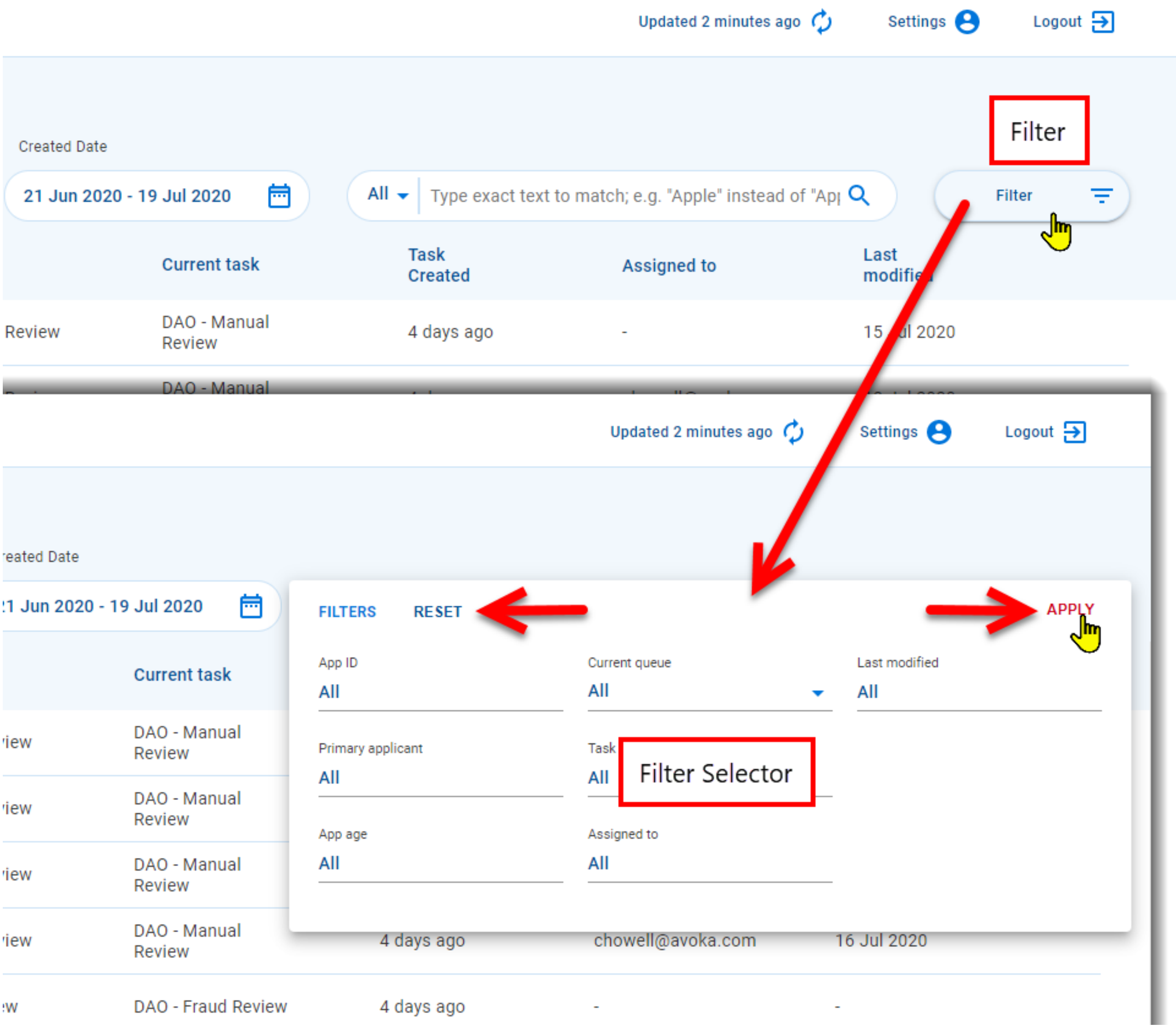


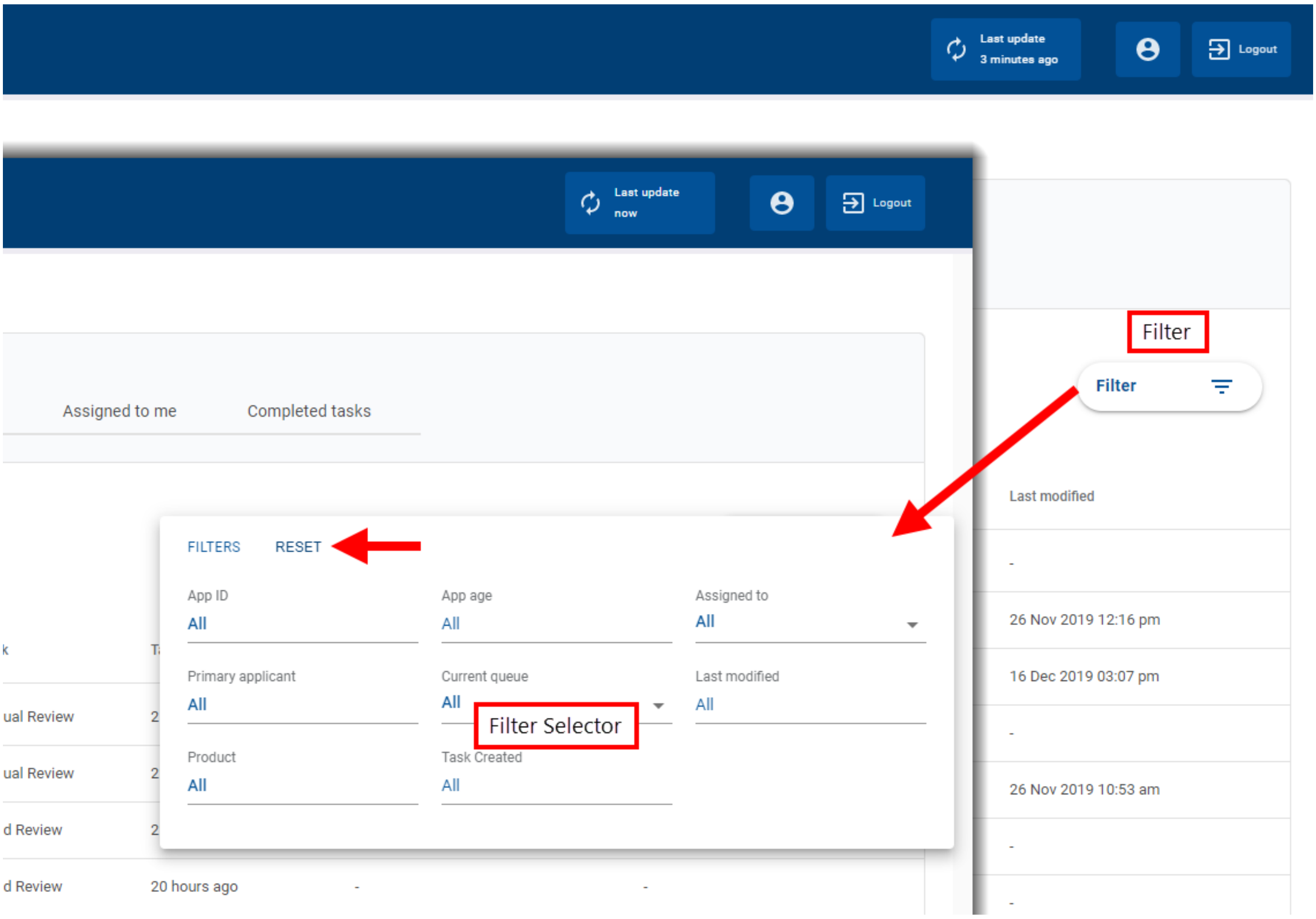


To apply a filter to the item list, click (Filter) (1) to display the Filters selector then select the filter values you want to apply from the various filter items (2,3) and click **Apply** (4). Click outside the Filters selector to close it. The number of active filter items is displayed on the **Filter** button (5).

Prior to Workspaces 19.11, filters are applied to the item list immediately after values are selected.

21.11 20.05 Prior to 20.05


Updated 2 minutes ago
Settings
Logout
Filter
Created Date
21 Jun 2020 - 19 Jul 2020
All
Type exact text to match; e.g. "Apple" instead of "Ap
Filter
Current task
Task Created
Assigned to
Last modified
Review
DAO - Manual Review
4 days ago
-
FILTERS
RESET
APPLY
App ID
All
Current queue
All
Last modified
All
Primary applicant
All
Task
All
Filter Selector
App age
All
Assigned to
All
4 days ago
chowell@avoka.com
16 Jul 2020
DAO - Fraud Review



Date Filters

Date fields in Workspaces can be configured to accept either a single date or a date range. So, when you click a date filter field, either a date picker or a date range picker is displayed depending upon how the field has been configured.

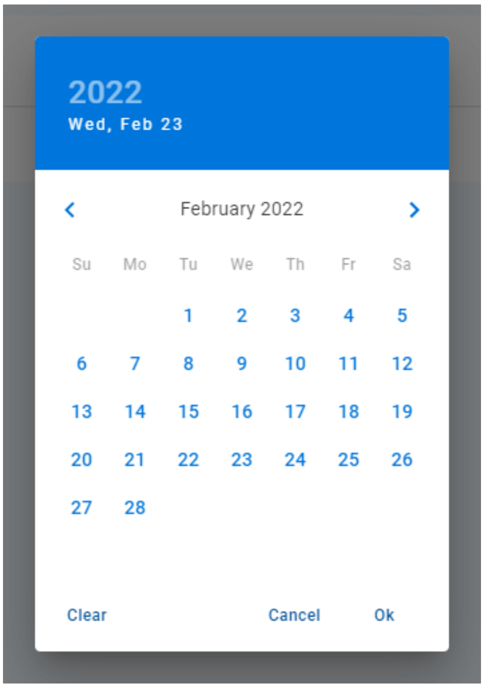
You can filter on a single date regardless of configuration. To filter on a single date:

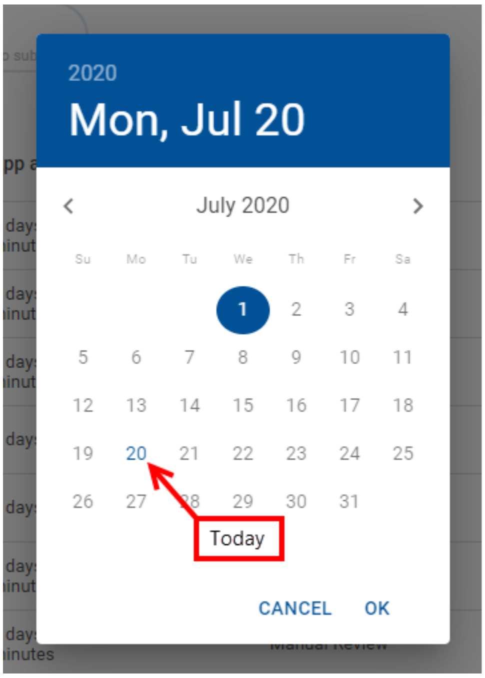
- **Date picker:** Simply click the date you want to filter on.
- **Date range picker:** Click the same date twice to select a one-day date range.

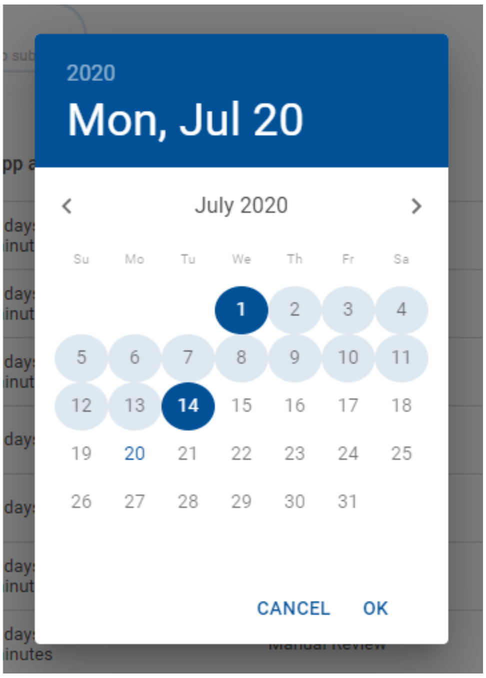
To filter on a date range, click the first date (4) then click a second date (5) to define the desired date range. You can click the dates in any order; you don't have to click the earlier date first.

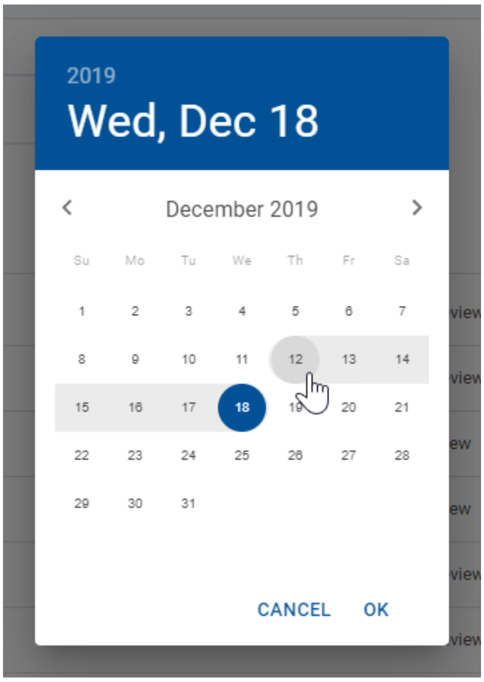
When selecting a date, use < (Previous Month) or > (Next Month) to browse to and select dates in other months. Once you've selected the date or dates for the filter, click **OK** (6) to apply the date filter.

21.11 20.05 Prior to 20.05









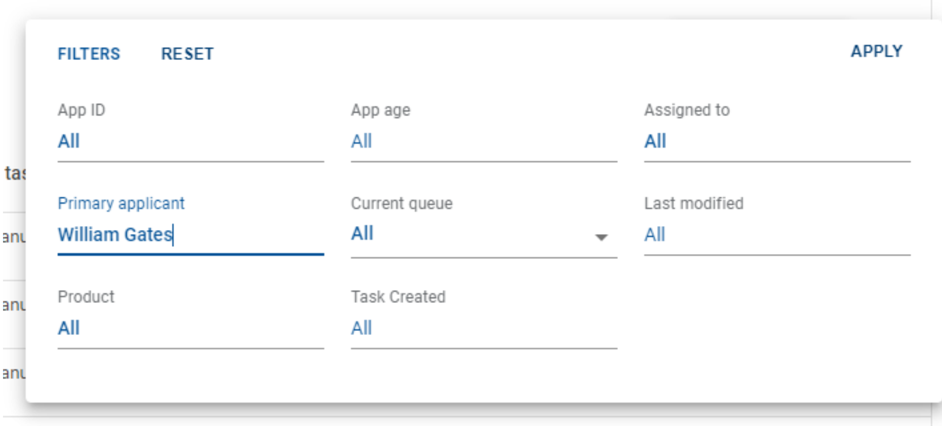
Text Filters

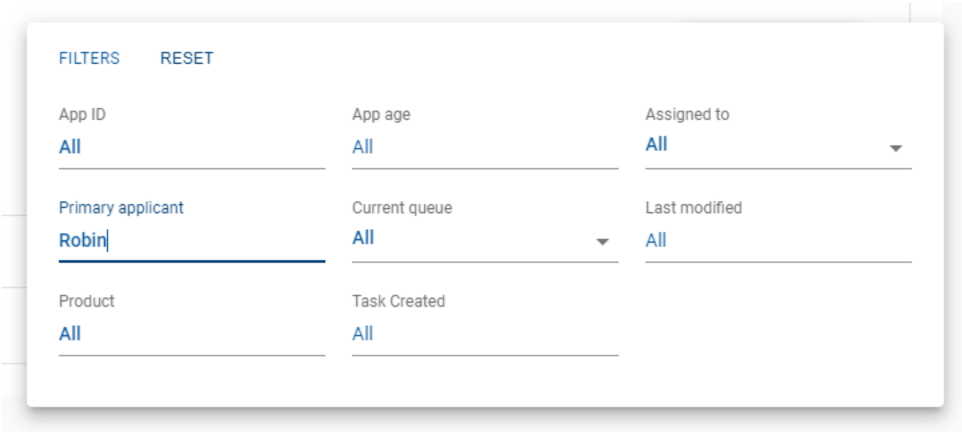
To filter on a text field, click the field in the Filters selector and enter the filter value. In Workspaces 19.11 and later releases, click **Apply** to make the filter active.

> Like searching, text filters find only those items that exactly match the filter criteria; partial match is not currently supported. And like searching, text filters are case-insensitive; that is, they treat uppercase and lowercase characters as the same.

20.05 and later

Prior to 20.05





Clearing Filters

To clear a filter on a filter field:

- **Single-select, Multi-select:** Select **All** from the filter field's dropdown list.
- **Date:** In Workspaces 21.11, click **Clear** on the date picker or date range picker. In earlier Workspaces releases, delete the date filter text.
- **Text:** Delete the filter text.

In Workspaces 19.11 and later releases, you need to click Apply after clearing any filter field values.

To clear all filters that you have applied, click **Reset**.

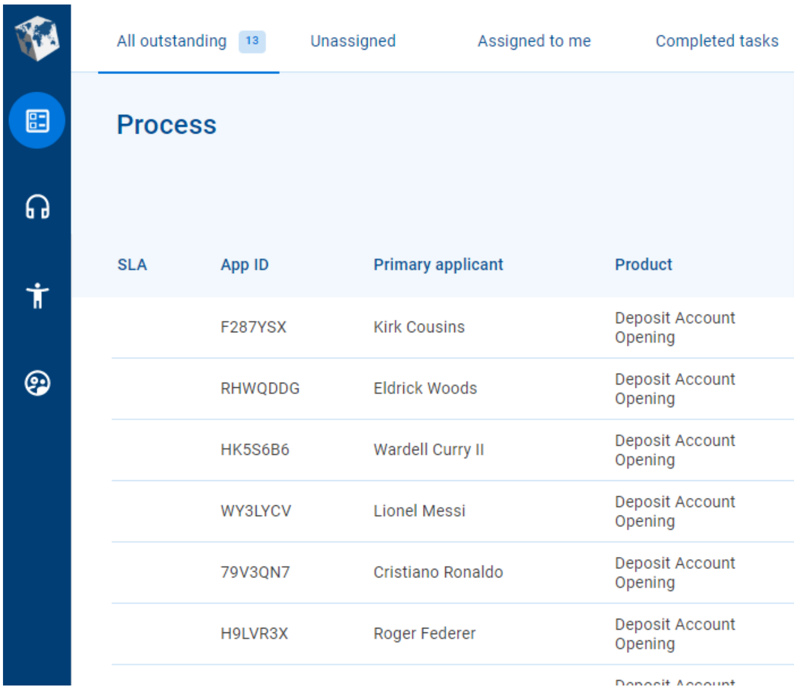
> When you clear all filters, the current view remains selected and any filters defined for that view are still applied or re-applied if you had changed them.

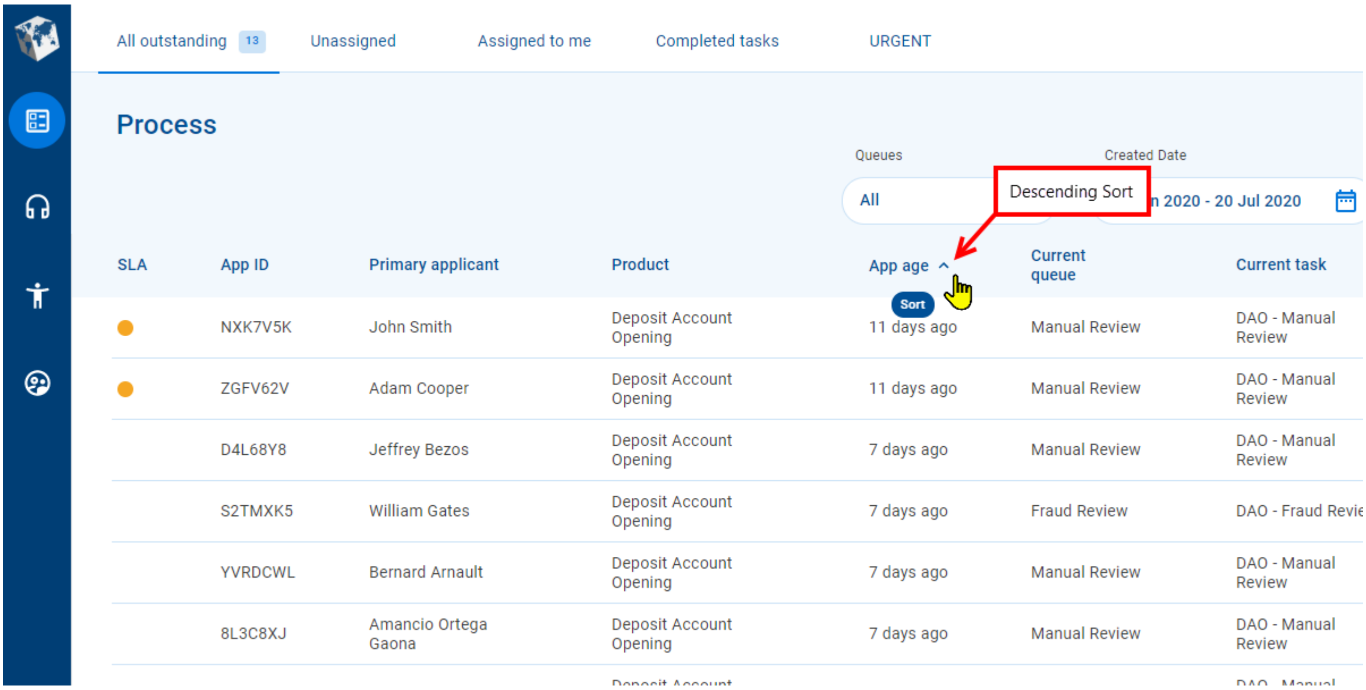
Sort the Item List

Items in the item list are displayed in an order determined by the current sort selection. This is indicated by an icon on the right-hand side of a column name. The (Sort Ascending) icon indicates the item list is sorted by the column values in ascending order, while (Sort Descending) indicates items are sorted by the column values in descending order.

Sort – Ascending order

Sort – Descending order





You can determine whether a column is available to use for sorting by pointing your cursor at a column heading. If your cursor changes to the hand pointer and a "Sort" tooltip is displayed, you can sort by the column. To change the sort order, click the column name. If you click the column name for the current sort selection, sorting will alternate between ascending and descending order.

The Application Details Screen

Workspaces | Workspaces User | 18.11 | 21.11

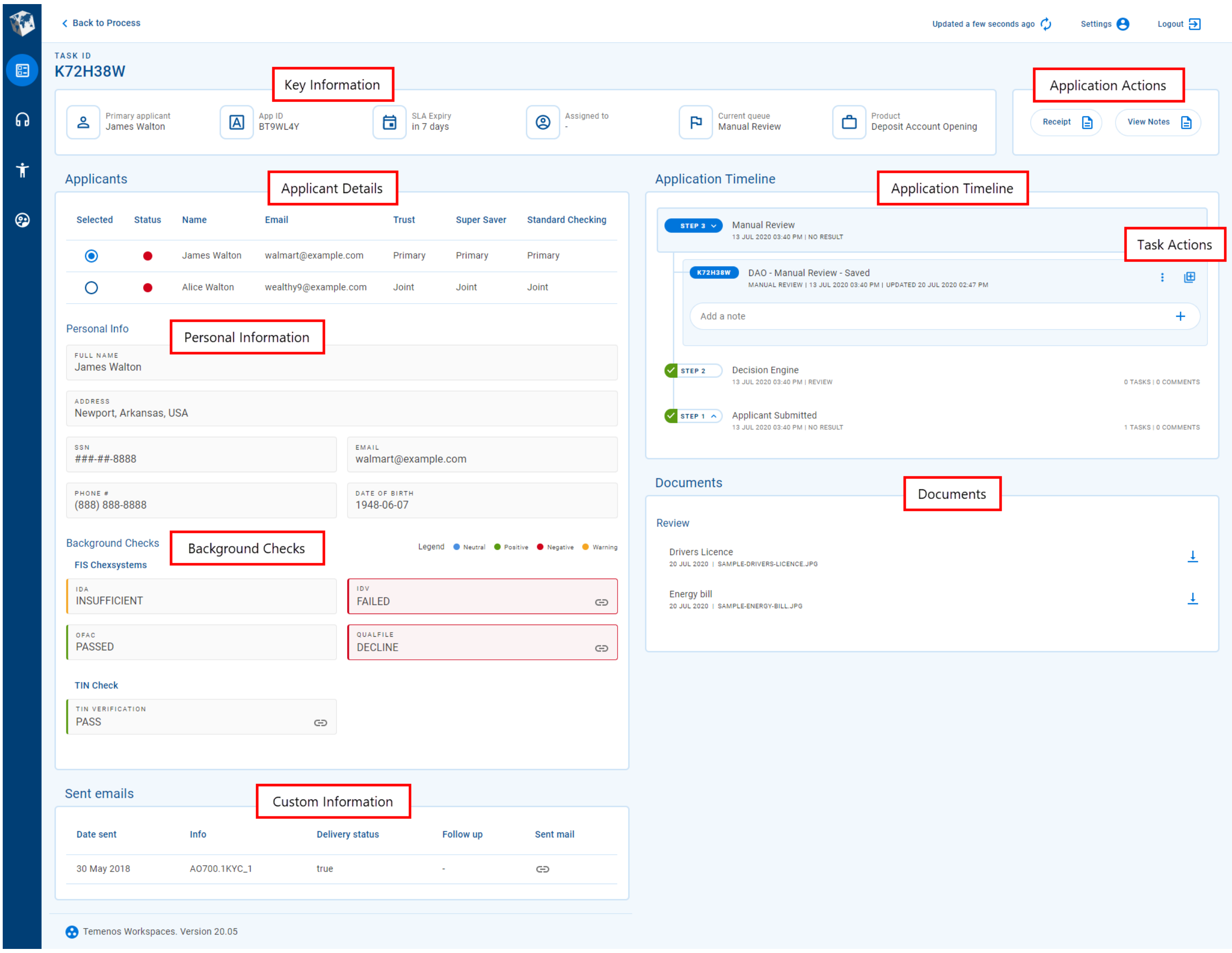
Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

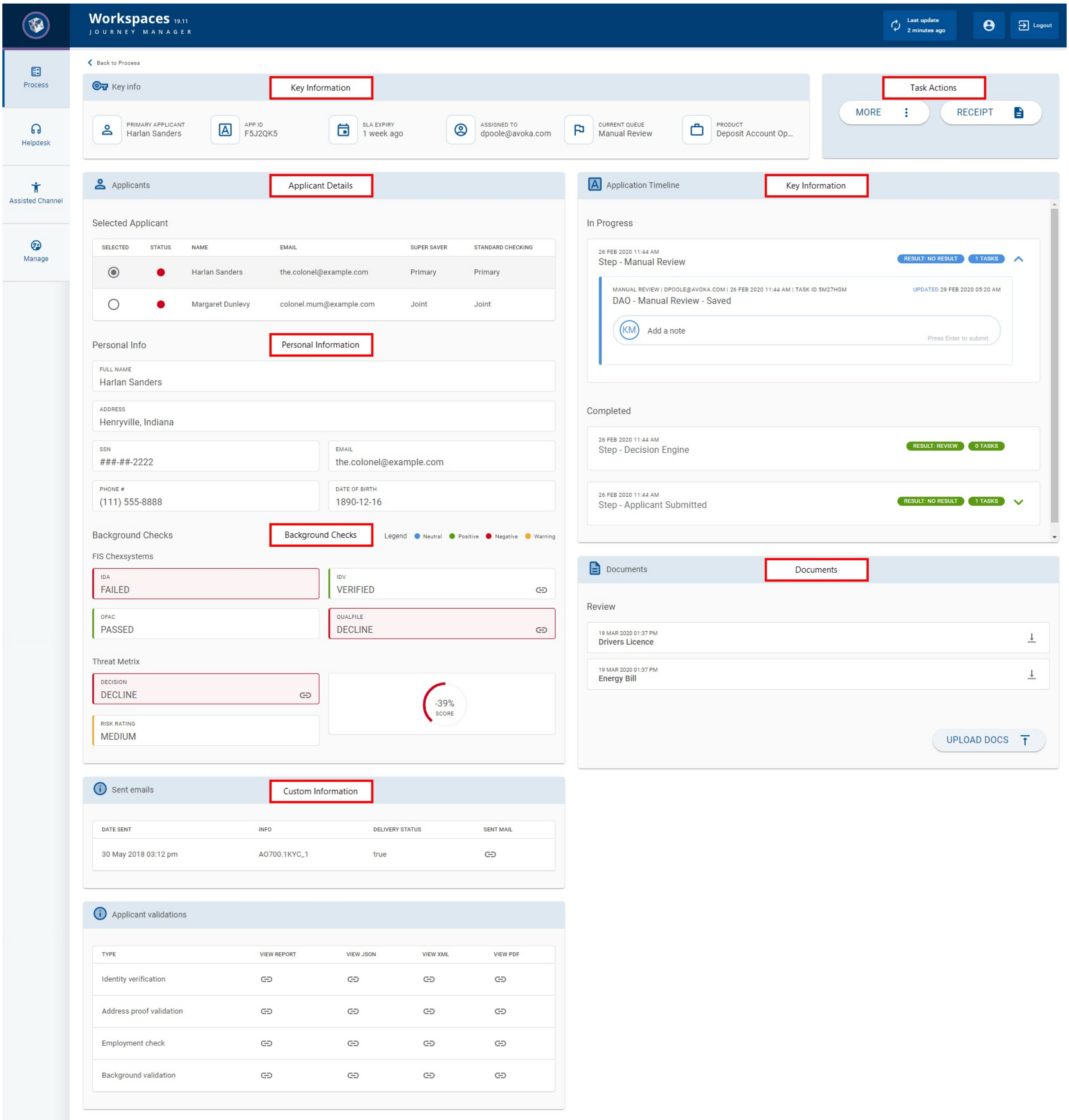
Overview

The Application Details Screen, as the name suggests, displays information about an individual application, and provides features for you to work with applications and tasks. The Details screen is displayed when a user clicks an application or task in an item list on a List screen, and the information displayed is reloaded when the use clicks a task in the Application Timeline. Application information is displayed in the context of a specific task, being either the first task for a saved application or any selected task for a submitted application.

Each space in the default configuration of the Workspaces portal includes its own Details screen, and all of them share a common layout and a lot of common functionality. However, each Details screen has some differences, and these are identified when discussing each of the spaces separately.

20.05 and later Prior to 20.05

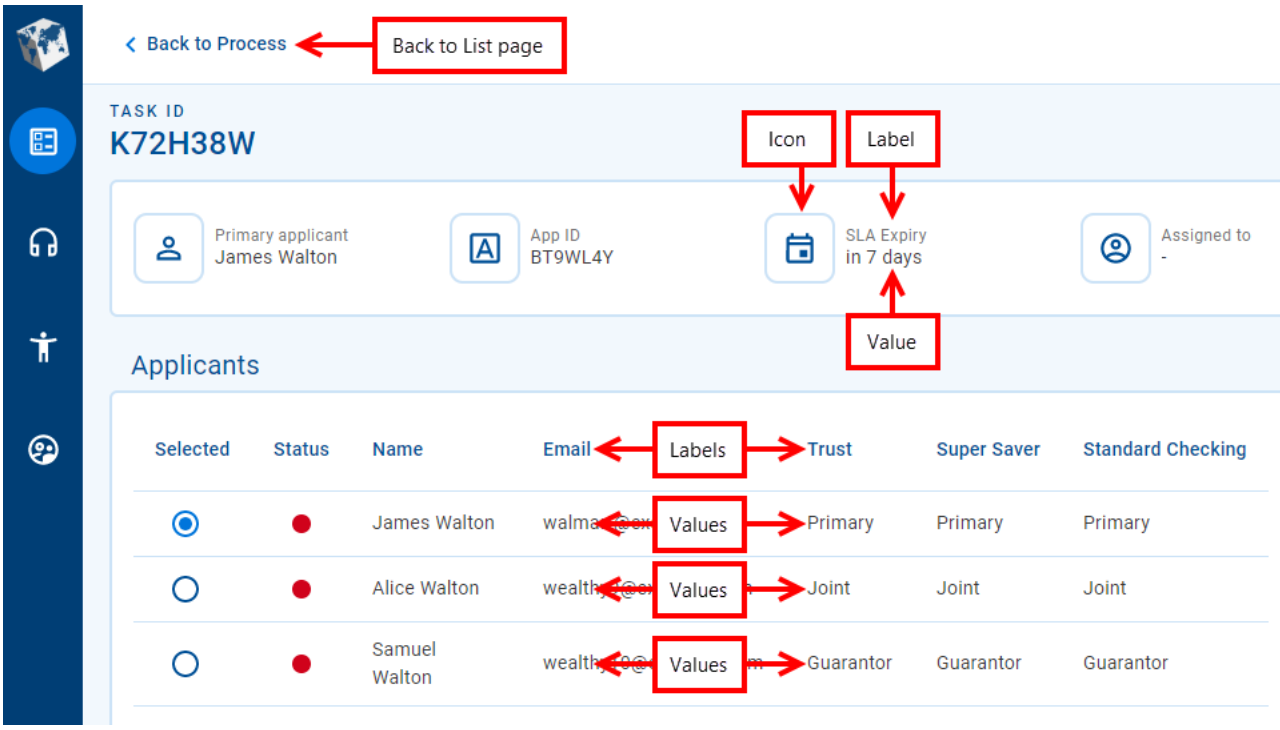

Back to Process
Updated a few seconds ago
Settings
Logout
TASK ID
K72H38W
Key Information
Application Actions
Primary applicant James Walton
App ID BT9WL4Y
SLA Expiry in 7 days
Assigned to -
Current queue Manual Review
Product Deposit Account Opening
Receipt
View Notes
Applicants
Applicant Details
Selected Status Name Email Trust Super Saver Standard Checking
James Walton walmart@example.com Primary Primary Primary
Alice Walton wealthy9@example.com Joint Joint Joint
Personal Info
Personal Information
FULL NAME James Walton
ADDRESS Newport, Arkansas, USA
SSN ###-##-8888
EMAIL walmart@example.com
PHONE # (888) 888-8888
DATE OF BIRTH 1948-06-07
Background Checks
Background Checks
FIS Chexsystems
Legend Neutral Positive Negative Warning
IDA INSUFFICIENT
IDV FAILED
OFAC PASSED
QUALFILE DECLINE
TIN Check
TIN VERIFICATION PASS
Sent emails
Custom Information
Date sent Info Delivery status Follow up Sent mail
30 May 2018 AO700.1KYC_1 true -
Application Timeline
Application Timeline
Task Actions
STEP 3 Manual Review
13 JUL 2020 03:40 PM | NO RESULT
K72H38W DAO - Manual Review - Saved
MANUAL REVIEW | 13 JUL 2020 03:40 PM | UPDATED 20 JUL 2020 02:47 PM
Add a note
STEP 2 Decision Engine
13 JUL 2020 03:40 PM | REVIEW
0 TASKS | 0 COMMENTS
STEP 1 Applicant Submitted
13 JUL 2020 03:40 PM | NO RESULT
1 TASKS | 0 COMMENTS
Documents
Documents
Review
Drivers Licence
20 JUL 2020 | SAMPLE-DRIVERS-LICENCE.JPG
Energy bill
20 JUL 2020 | SAMPLE-ENERGY-BILL.JPG
Temenos Workspaces. Version 20.05



On the Details screen, you can view information about the application and its associated tasks, and take appropriate actions to complete the tasks, thereby progressing the application through its processing life cycle. The Details screen includes the following features, each of which is contained in a separate card or in a separate card section.

- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. | 19.11
- A set of standard actions that you can perform at the current stage of the application's life cycle. | 20.05
- A list of applicants and products from which you can select an applicant to view more details. | 19.11
- Personal information for the selected applicant, including identity and contact details. | 19.11
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability. | 19.11
- A feature-rich application timeline of all the steps that the application has progressed through, showing key application details as well as tasks with accompanying notes. | 20.05
- Timeline task items that show the application's progress; select one to reload the Details screen and present the application in the context of the selected task. | 20.05
- A dynamic set of actions that are applicable to the selected timeline task and currently available for you to perform, thereby giving you confidence that you're acting on the right task. | 20.05
- Attached documents relating to the application. | 19.11
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

Generally, each information item or data field on the Details screen has a label and a value. The label identifies the specific entity that the field relates to, and the value is the application data corresponding to the label. Sometimes, there may be multiple values for one label; for example, when data is presented in a table.



Fields display information of various data types including text (name, email address, some IDs), numbers (phone, SSN), and dates. A date may represent either a specific point in time (date of birth) or a duration (application age).

Numbers and dates can be configured to use a variety of formats. For example:

- Phone numbers can be formatted for the current locality or to accommodate internationalization.
- 9-digit Social Security Numbers are commonly displayed using the format "AAA-GG-SSSS".
- Dates representing a point in time can use either absolute ("1 Jan 2022", "today") or relative ("last Wednesday", "6 days ago") formats.
- Dates representing a duration can use either specific ("7 days, 3 hours, 26 minutes") or approximate ("about 7 days", "last week") formats.

Sometimes a value might be too long to fit in the space available for it; in this case, the value is often truncated and an ellipsis ('...') is appended to indicate that you're not looking at the full value. To see the full value, point your cursor at the truncated value and a tool tip is displayed showing the full value.

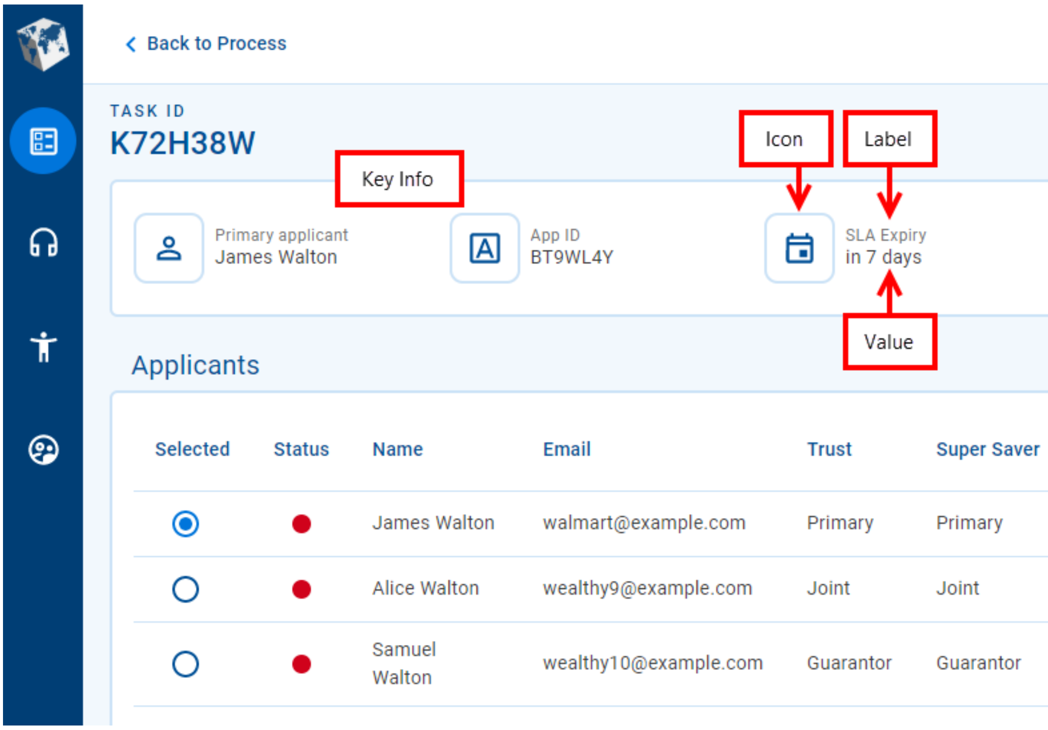
By default, values in table columns wrap when they are wider than the column. However, sometimes this behavior is undesirable, and it can be overridden for specific columns via configuration.

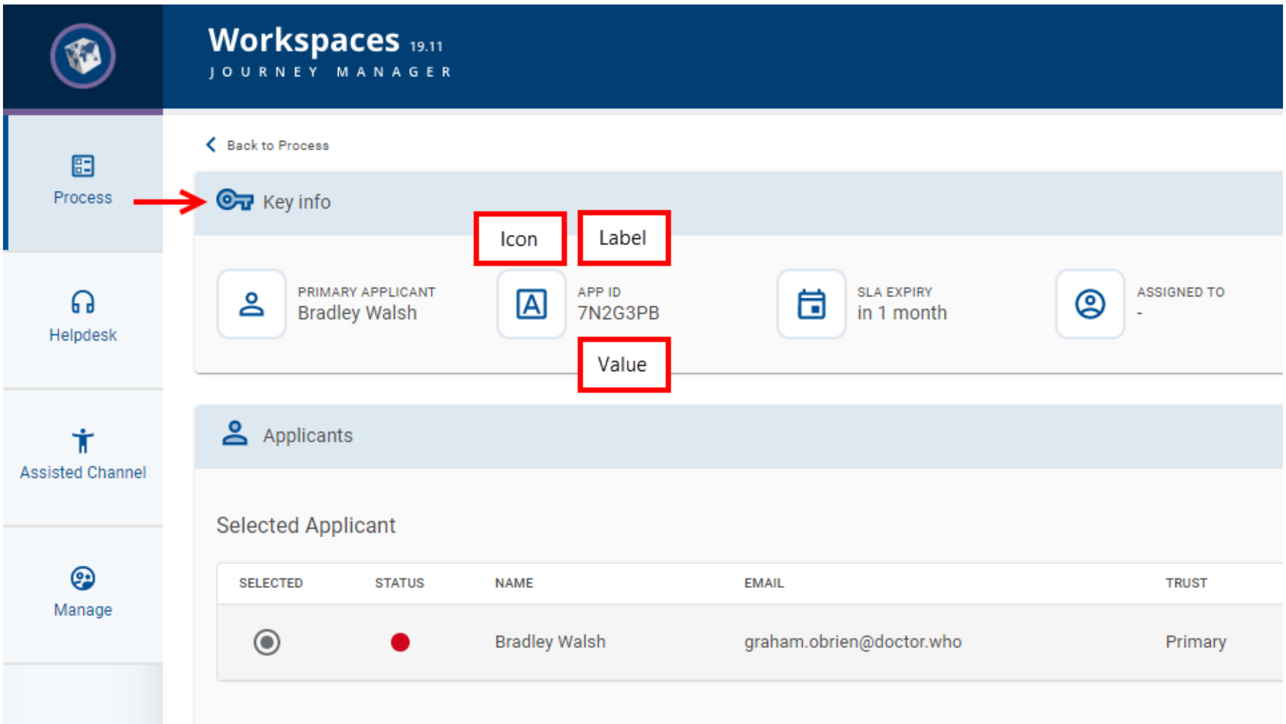
To return to the , click the **Back to ...** link at the top of the screen, or click an item in the Spaces panel.

Key Information

The Key Information card displays important application information that's handy for Workspaces staff to have at their fingertips.

20.05 and later Prior to 20.05



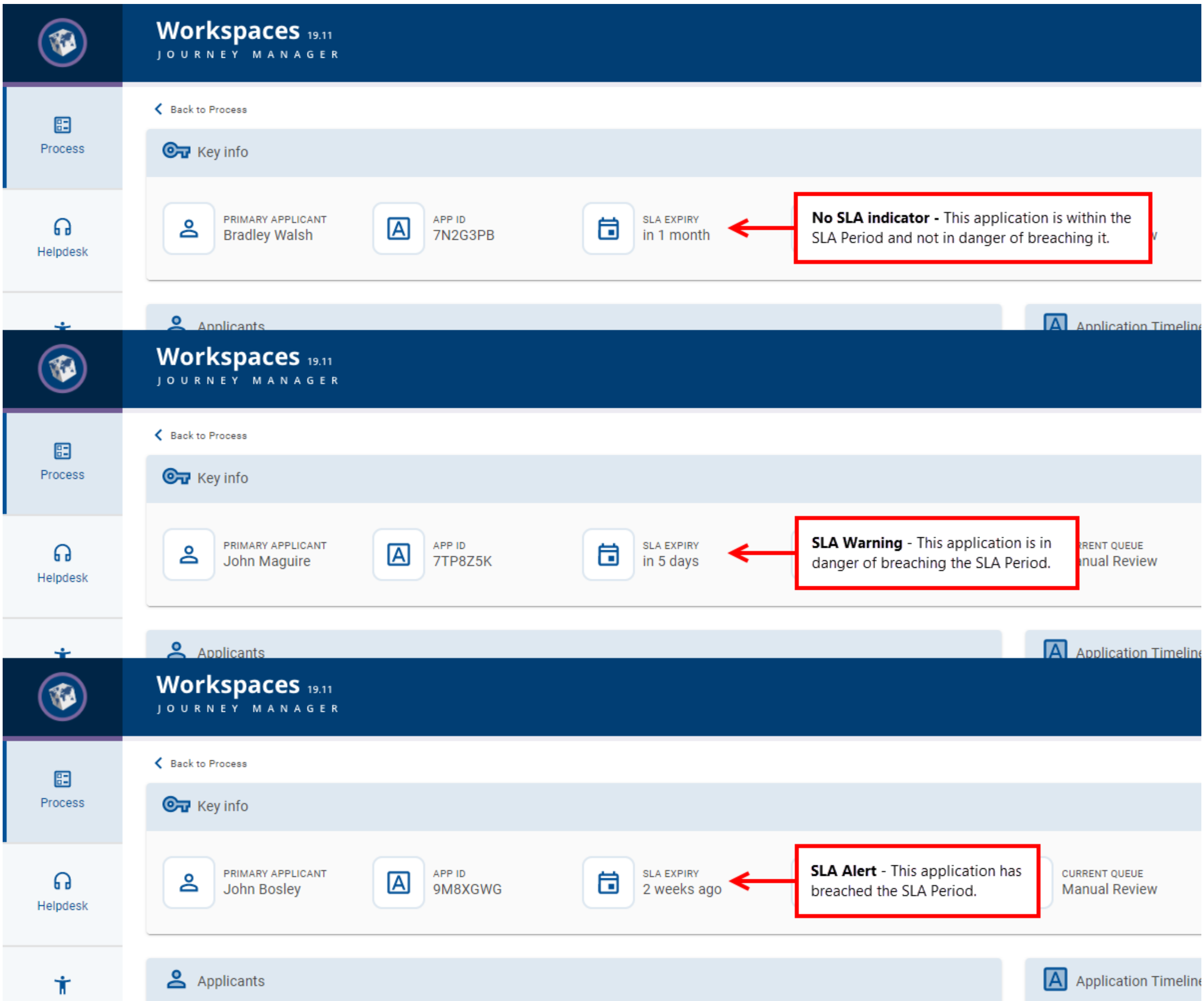


Items on the Key Info card have a label and a value as well as an icon that provides a visual representation of the type of entity that the information is related to; for example, a unique identifier (ID), a person or a duration. The Key Info card includes between four and six items depending on the width of your browser window. The full width layout accommodates six key info items but as the width of your browser becomes smaller, items are removed progressively until only four items are displayed.

SLA Expiry | 19.11

While the SLA Expiry field is available in the default configuration of Workspaces, it may not be available in your Workspaces portal or it may appear differently depending upon how your Workspaces portal has been configured.

Workspaces enables you to monitor the progress of each submitted application against a crucial service indicator, such as an SLA. On the Details page, **SLA Expiry** in the Key Info card shows the amount of time remaining to complete processing of the application or the elapsed time since the SLA was breached.



Unlike the graphical SLA indicator on the List page, the SLA Expiry field does not explicitly indicate when an application is in the SLA Warning period.

Actions | 20.05

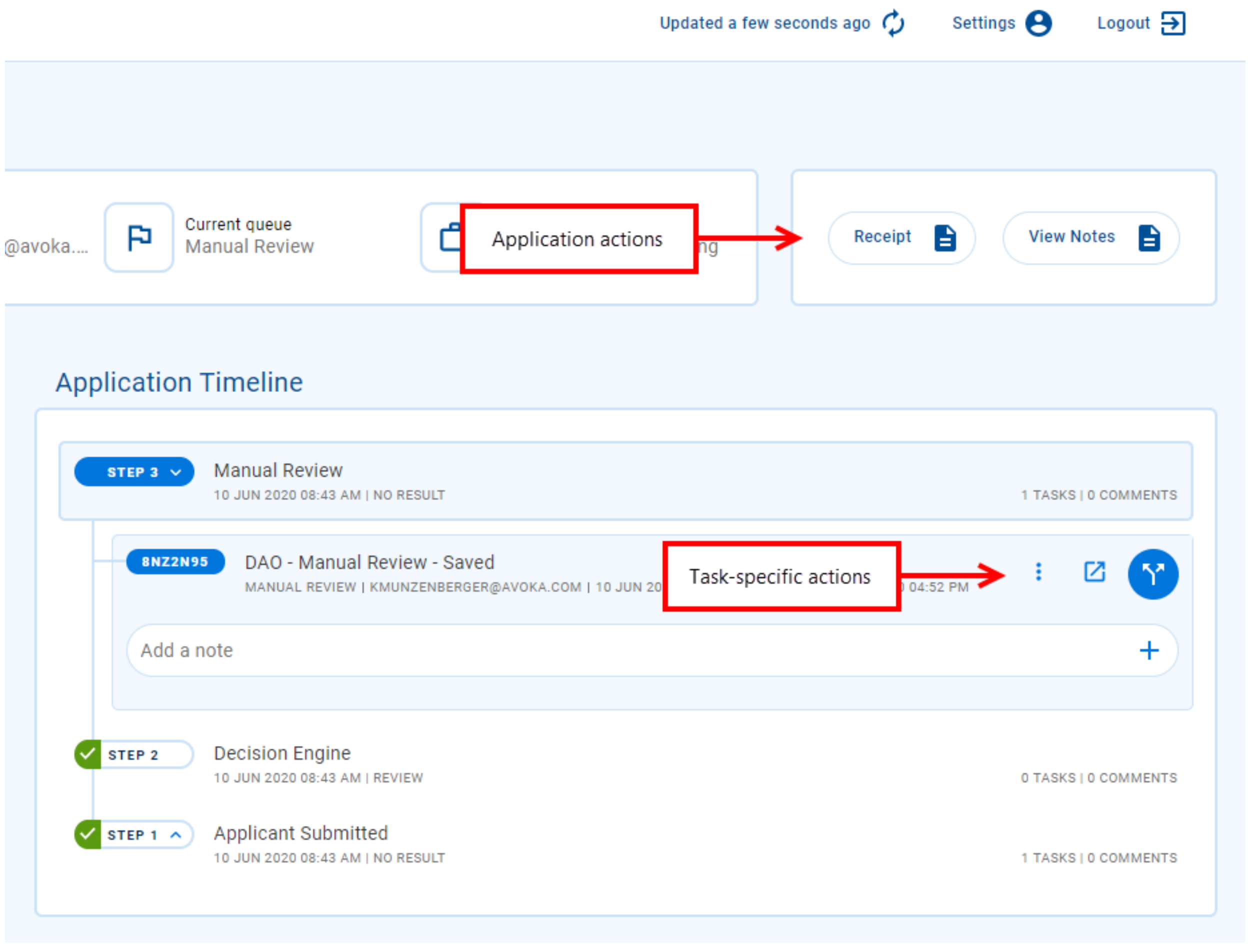
Workspaces provides a set of standard actions for working with applications and tasks. All of the standard actions are available in the default configuration. In addition to the standard actions, Workspaces also supports the configuration of custom actions that allow your Workspaces portal to be extended with functionality that is not available in the default configuration.

> Button labels and hints (where available) are configurable and may not be the same as the standard action types in your Workspaces portal.

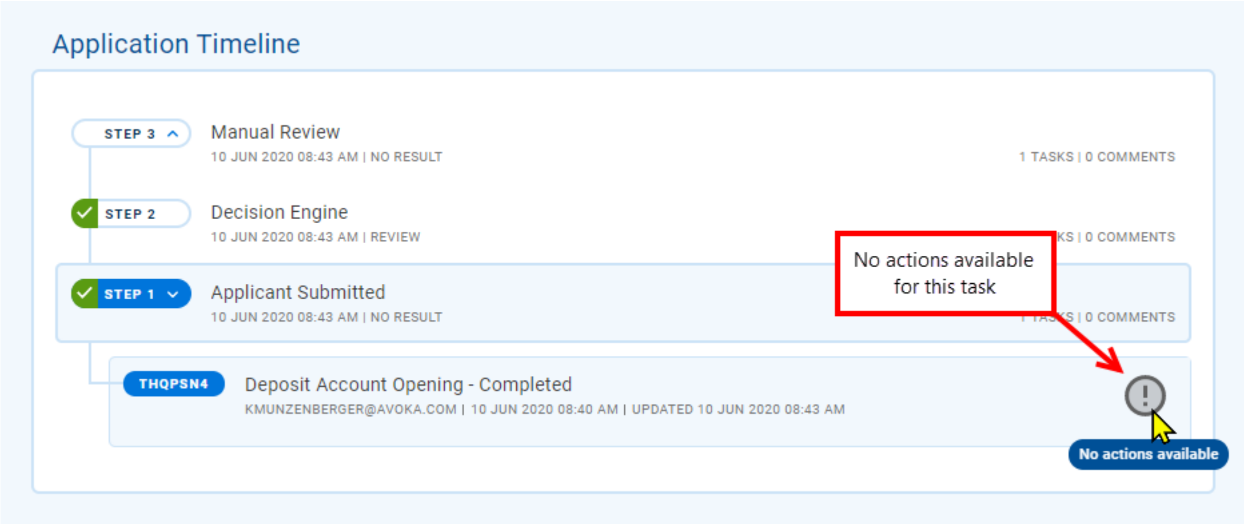
Standard Actions in Workspaces 20.05

Standard actions can be performed from any Details page. However, the way actions are made available on a Details page varies depending upon whether the action relates to an application or a task.

- For standard actions relating to applications, there are buttons in the Action panel to the right of the Key Info card.
- For standard actions relating to tasks, there are icon buttons on each task in the Timeline.



Different actions may be available for each task as the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Assign action will not be available for a task that has been assigned to a user already. If there are no available actions for a task, Workspaces indicates this by displaying the (No Actions Available) icon, instead of the usual action icon buttons, with the icon's gray color reinforcing the lack of available actions.



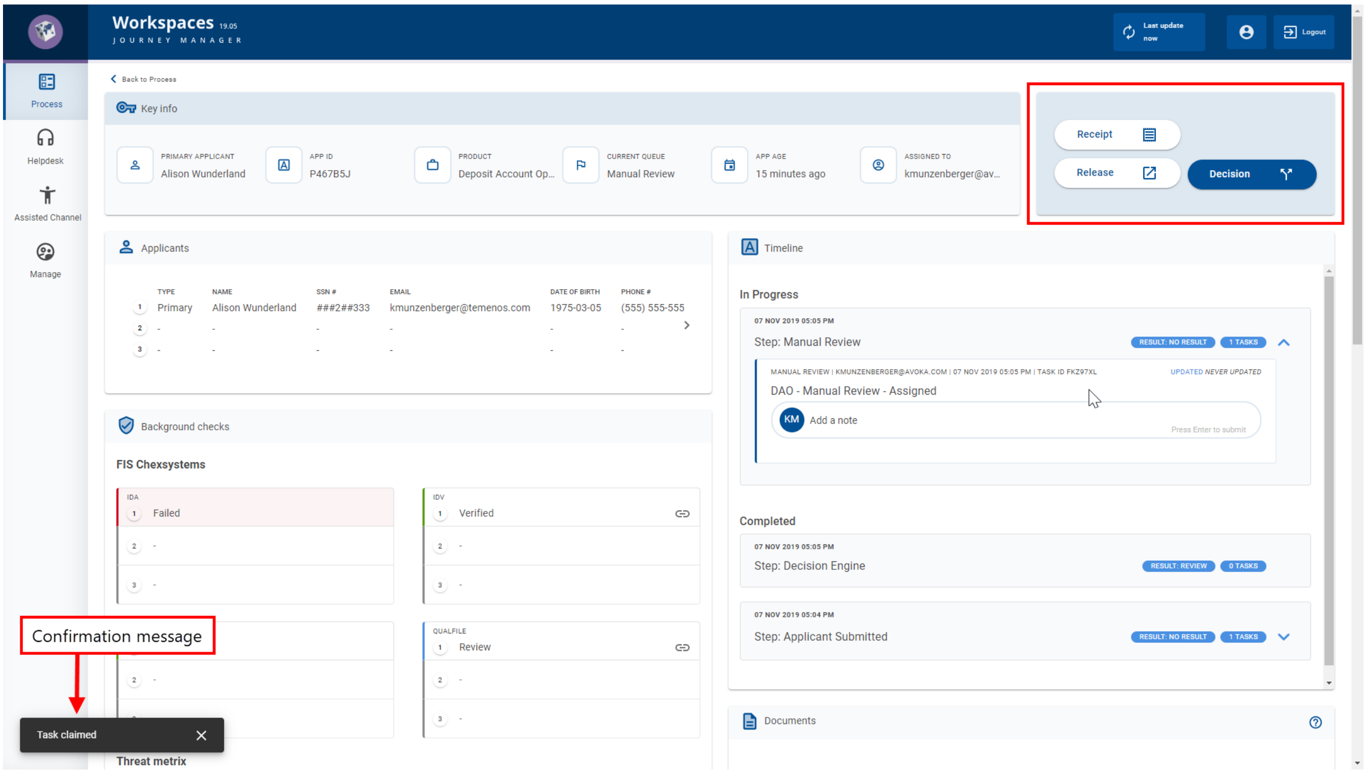
To perform a standard action, click the application or task button corresponding to the desired action. Most standard actions will display a brief message in the bottom right corner of the screen confirming that your desired action was successful or notifying you that something went wrong.

Standard Actions in Workspaces 19.11 and earlier releases

Standard actions can be performed from any Details page. On the Details page, buttons for the available standard actions can be found in the Action panel to the right of the Key Info card.

Different actions may be available for each task as the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Assign action will not be available for a task that has been assigned to a user already.

To perform a standard action, click the button corresponding to the desired action. Most standard actions will display a brief message in the bottom right corner of the screen confirming that your desired action was successful or notifying you that something went wrong.



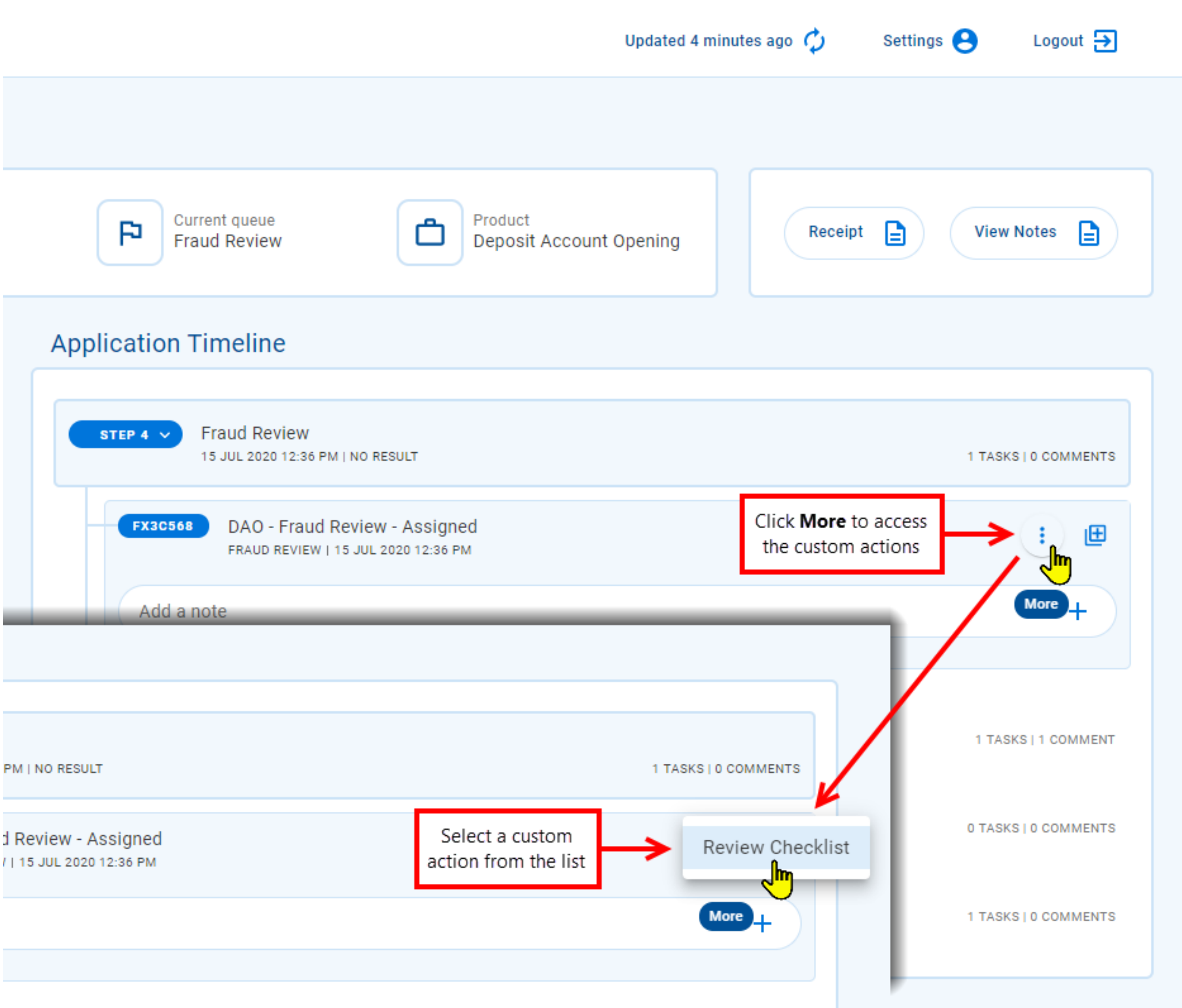
Custom Actions

Custom actions can be performed from a Details page only. The available custom actions can be accessed via the **More** button in the action group to the right of the Key Info card on the Details page.

> The default configuration of Workspaces does not include any custom actions. If custom actions are available in your Workspaces portal, these actions and what they do are specific to the configuration of your Workspaces portal and, hence, are not covered by this documentation.

To perform a custom action, click the **More** button then select the desired action from the list displayed. What happens next depends on the configuration of the custom action and may require user interaction, or may trigger some back-end functionality in Journey Manager or another back-end system.

20.05 and later   Prior to 20.05


Updated 4 minutes ago
Settings
Logout
Current queue
Fraud Review
Product
Deposit Account Opening
Receipt
View Notes
Application Timeline
STEP 4
Fraud Review
15 JUL 2020 12:36 PM | NO RESULT
1 TASKS | 0 COMMENTS
FX3C568
DAO - Fraud Review - Assigned
FRAUD REVIEW | 15 JUL 2020 12:36 PM
Click More to access the custom actions
Add a note
More
1 TASKS | 1 COMMENT
0 TASKS | 0 COMMENTS
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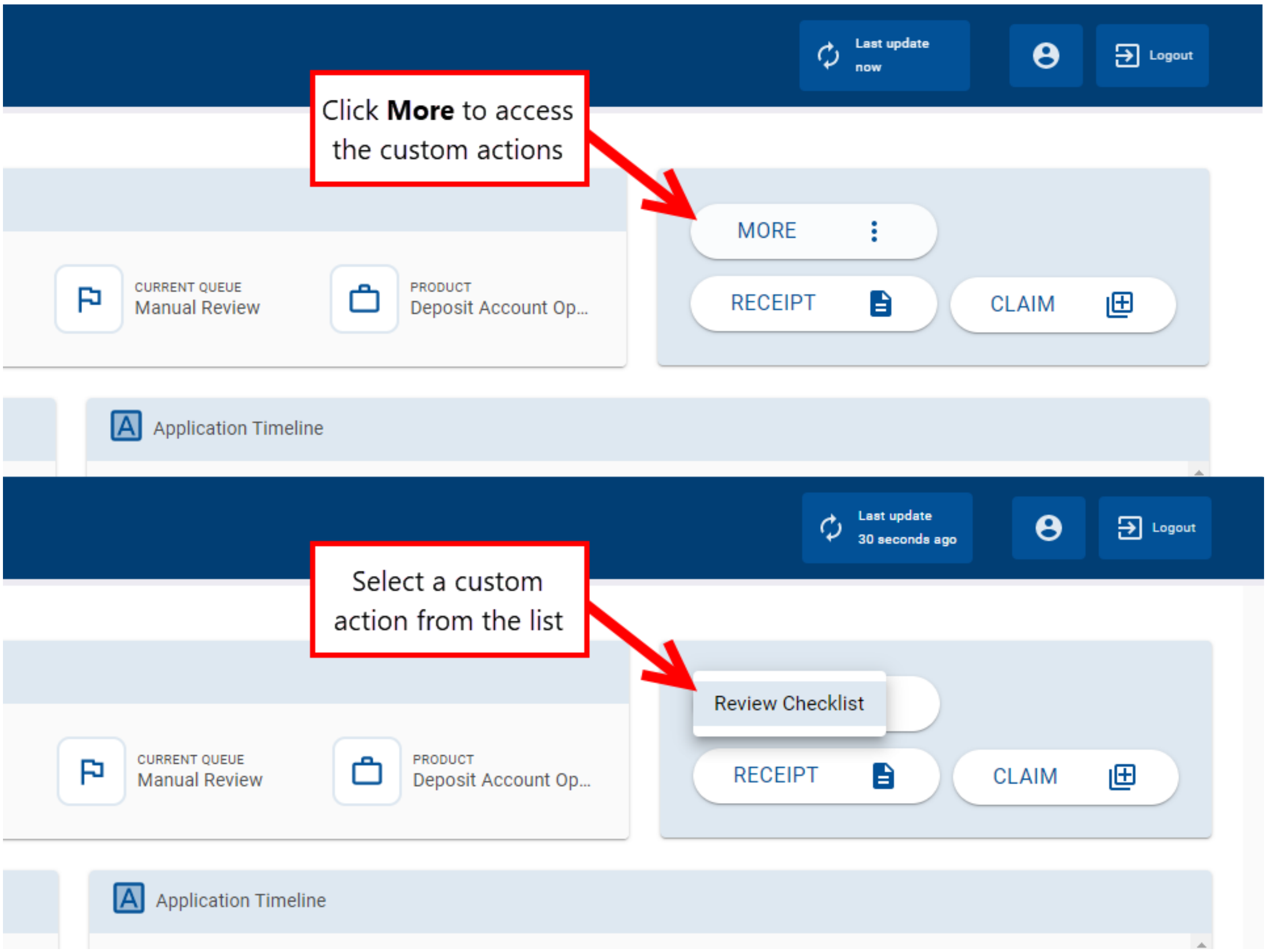
Select a custom action from the list
Review Checklist
More



Applicant Information

When an applicant fills out an application, they are usually required to provide, for each applicant, personal information that serves to identify them uniquely. This personally identifiable information (**PII**[1]) is often used to perform background checks which are critical in successfully processing the application.

Changes have been made to the way applicant information is presented in Workspaces 19.11. Prior to Workspaces 19.11, applicant Information and background checks were displayed in two separate cards, **Applicants** and **Background Checks**, and all information for all applicants was displayed simultaneously. In Workspaces 19.11, applicant Information and background checks are now displayed for one applicant at a time, and in two separate sections of the **Applicants** card, **Personal Info** and **Background Checks**. These two sections are preceded by a **Selected Applicant** section containing the list of applicants, from which one applicant can be selected to see their information.

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[1]Personally Identifiable Information (PII) is information about an individual that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and any other information that is linked to an individual.

Applicant Information in Workspaces 19.11 and later releases

All information pertaining to the applicants is combined into a single **Applicants** card. In the default configuration, the **Applicants** card uses the same layout in all spaces, consisting of three sections:

- **Selected Applicant** - The list of applicants, with some key applicant-related information. This is where you select an applicant to show more information about them.
- **Personal Info** - A read-only view of the selected applicant's personal information, or **PII**[1] .
- **Background Checks** – The results of various checks or verifications relating to the selected applicant.

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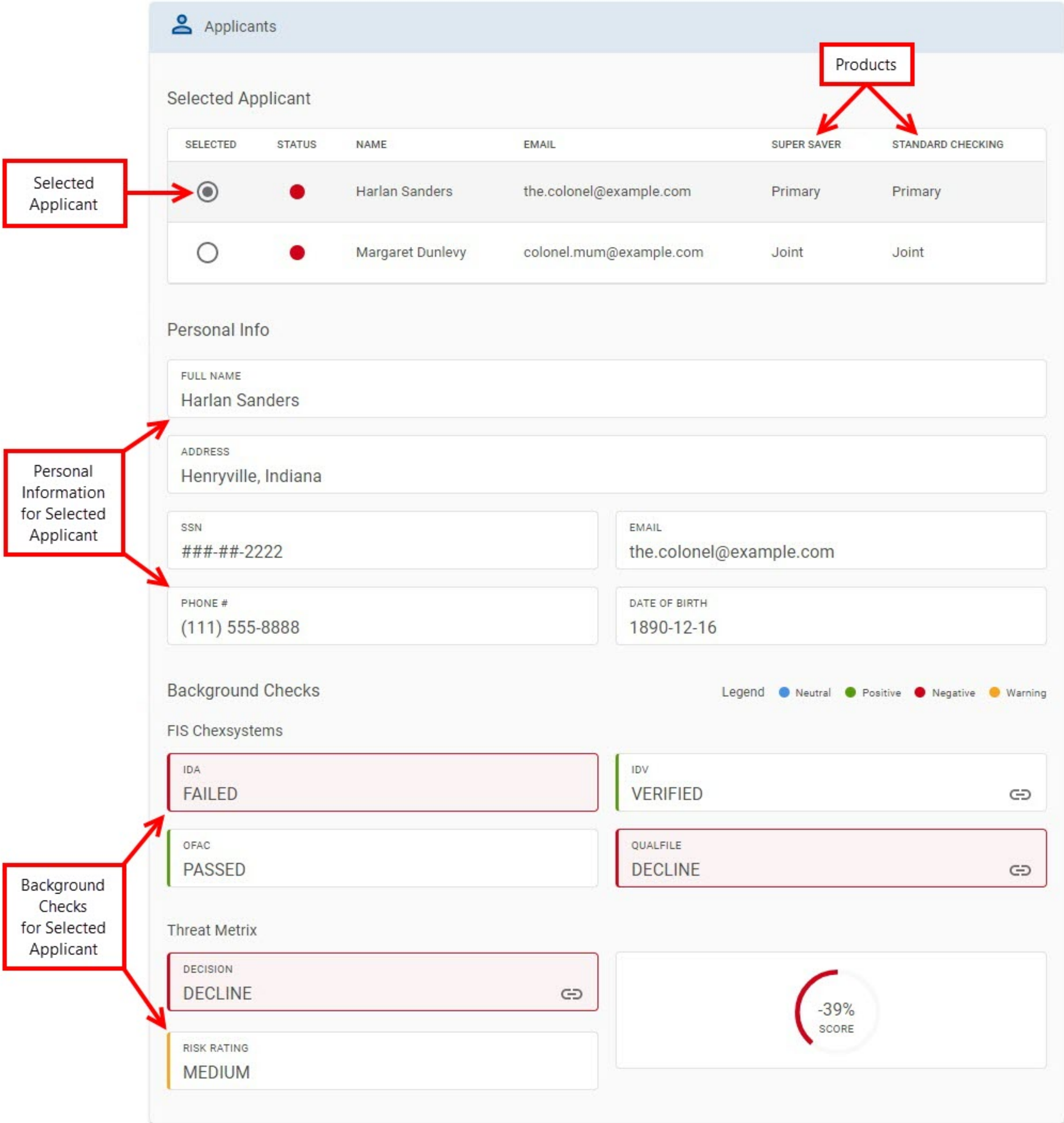
[1]Personally Identifiable Information (PII) is information about an individual that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and any other information that is linked to an individual.

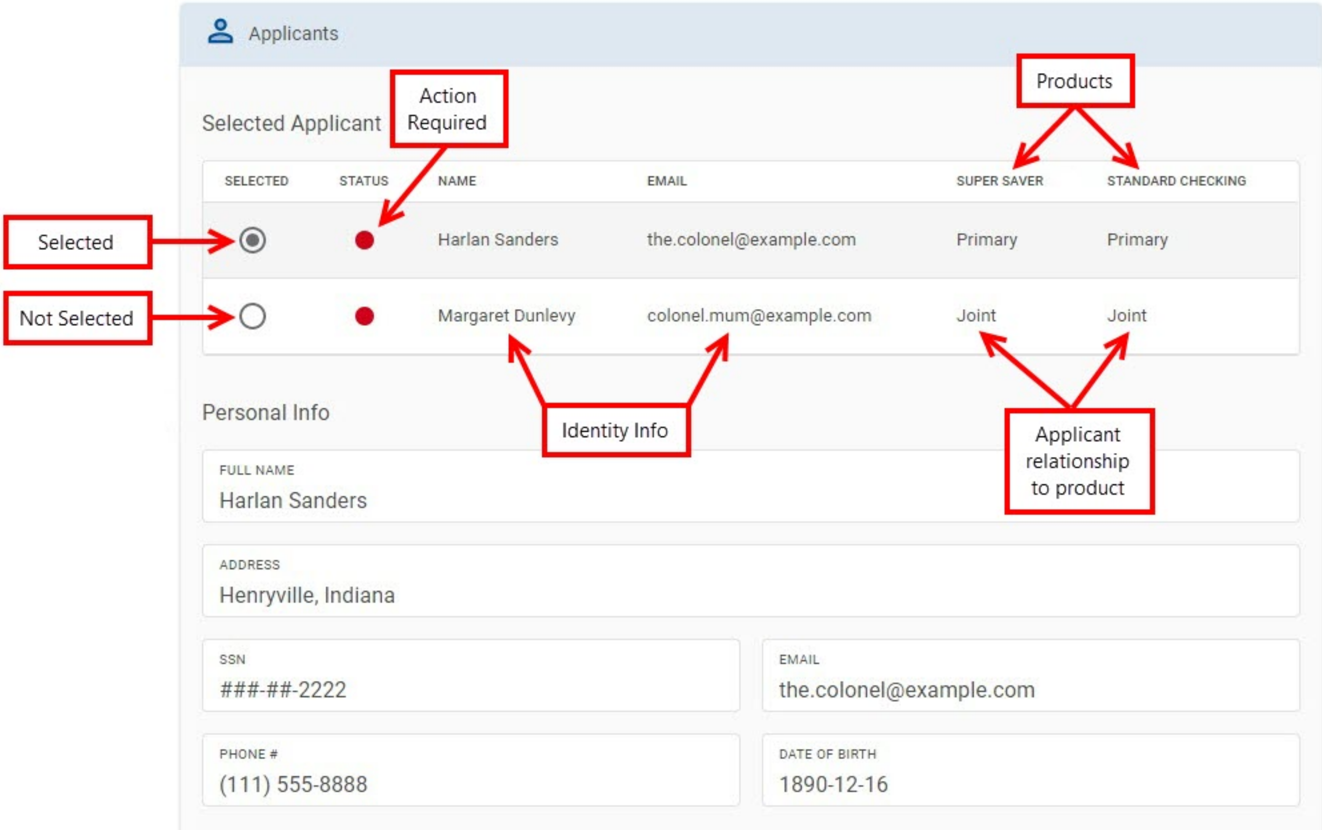


Selected Applicant

As mentioned above, the **Selected Applicant** section serves two purposes. In addition to displaying key applicant-related information, you can select an applicant from this section to display their information in the **Personal Info** and **Background Checks** sections.

In the default configuration, the key applicant-related information shown for each applicant includes:

- A **Selected** indicator (radio button) showing which applicant is currently selected.
- A **Status** indicator (red disc) showing whether any of the background checks require attention when processing the application.
- Applicant identity information (**Name**, **Email**).
- Finally, on the right-hand side there's a column for each product in the application.

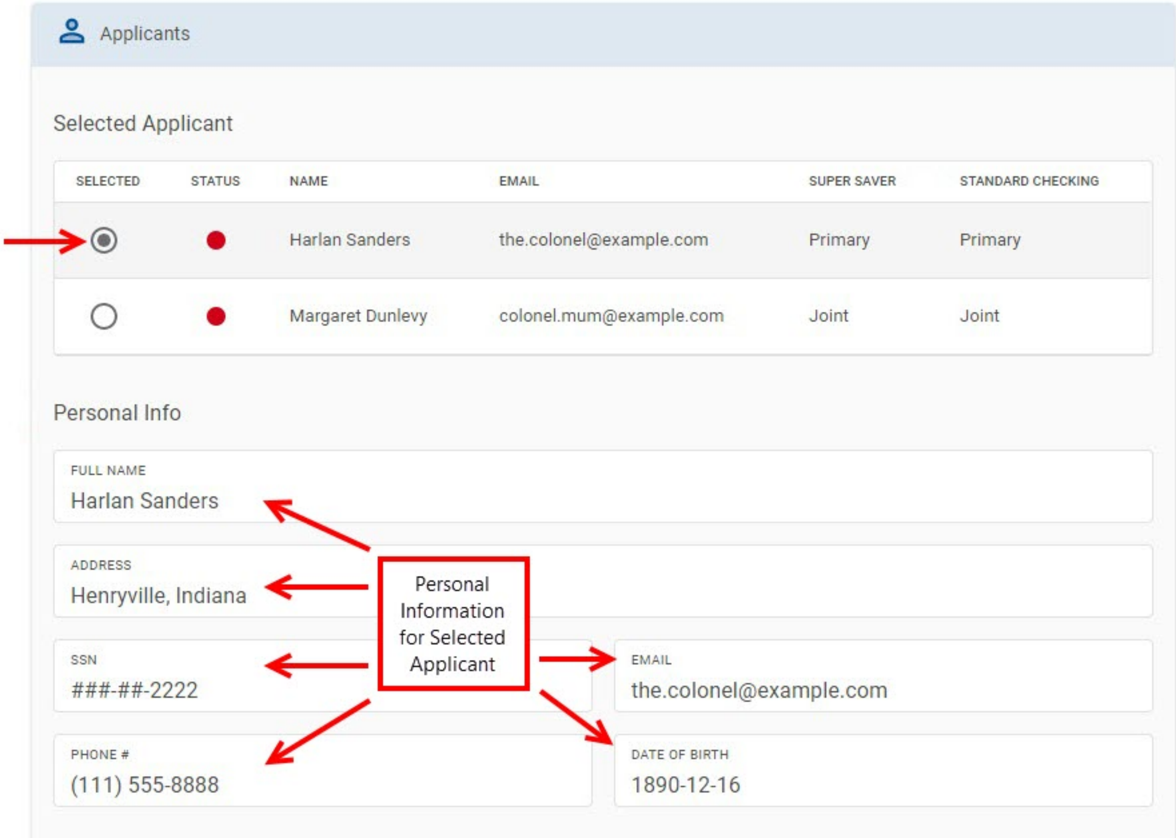


The product columns correspond to the products in the application that were selected by the applicant, and the values in these columns indicate how each applicant relates to each product in the application; for example, whether an applicant is the primary applicant, a joint applicant, or even a guarantor.

The first four columns in the **Selected Applicant** table are fixed (in the default configuration), with only **Name** and **Email** being applicant information. **Status** is a system-generated value based on the results of the applicant's background checks, and **Selected** reflects a choice made by a Workspaces user. In contrast, the number and names of the product columns may vary from one application to the next as they are determined by selections made by the applicants when completing their application. Similarly, the values displayed in the product columns are also application specific, as they correspond to selections made by the applicants when completing the application.

Personal Info

Immediately beneath the **Selected Applicant** section is the **Personal Info** section. This section, as the name suggests, displays personal information (**PII**[1]) relating to the currently selected applicant. Prior to Workspaces 19.11, the personal information for all applicants was displayed simultaneously in a tabular view. In Workspaces 19.11, personal information is displayed in a grid layout for just one selected applicant. This change was made to improve the user experience when dealing with applications that include multiple applicants and/or multiple products.



Background Checks

The Background Checks section displays a read-only view of the results of various checks or verifications relating to the selected applicant. Examples of checks and verifications that might appear here include identity verification and risk rating.

The background checks are displayed in groups, showing the name of each background check and the corresponding results. Those for which results are not available are shown with no data.

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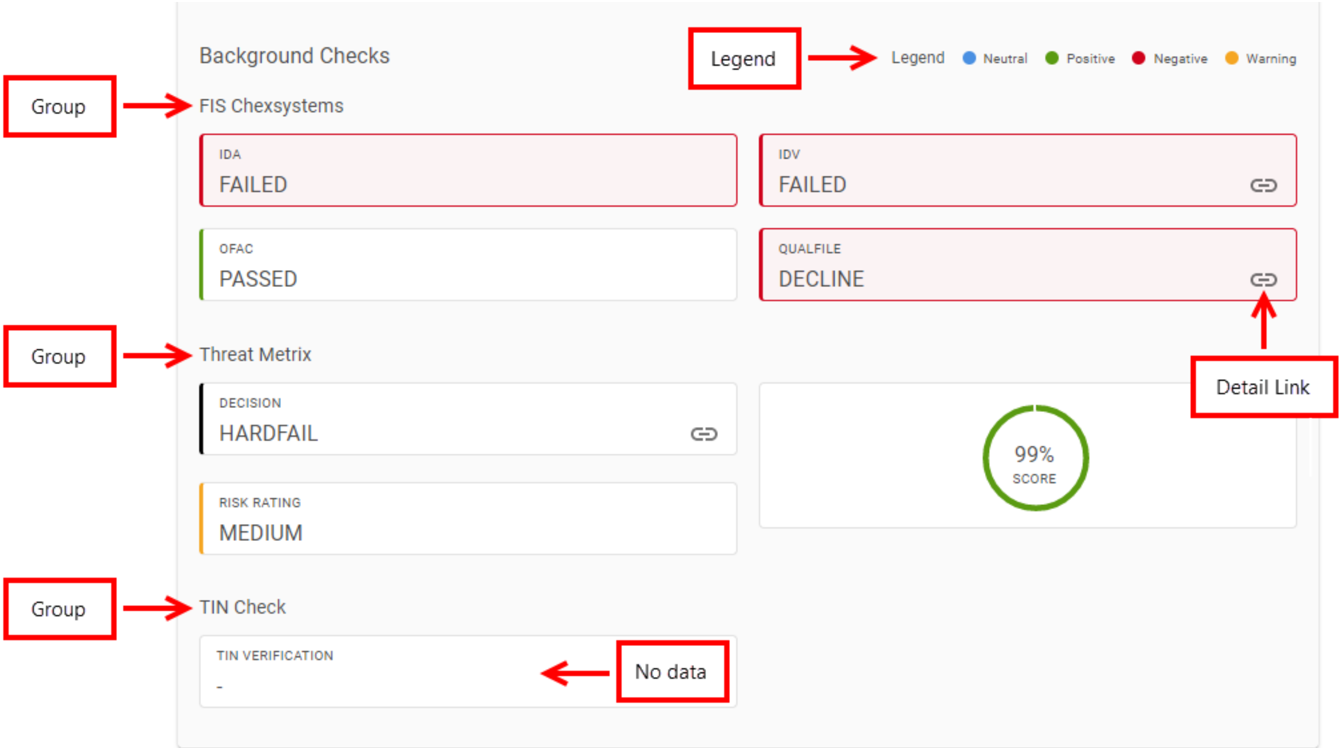
[1]Personally Identifiable Information (PII) is information about an individual that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and any other information that is linked to an individual.



The result of each background check is reinforced through the use of color. Workspaces supports a set of standard colors that can be associated with various results or states. Here are the available colors and some suggestions for how they might be used.

- **Green, Light Green** – Indicate positive results.
- **Red, Black** – Indicate negative results.
- **Blue** – Used for neutral states.
- **Orange** – Represents intermediate or other states.

The Background Checks section includes a legend identifying the principle colors (blue, green, red, orange) and their indication.

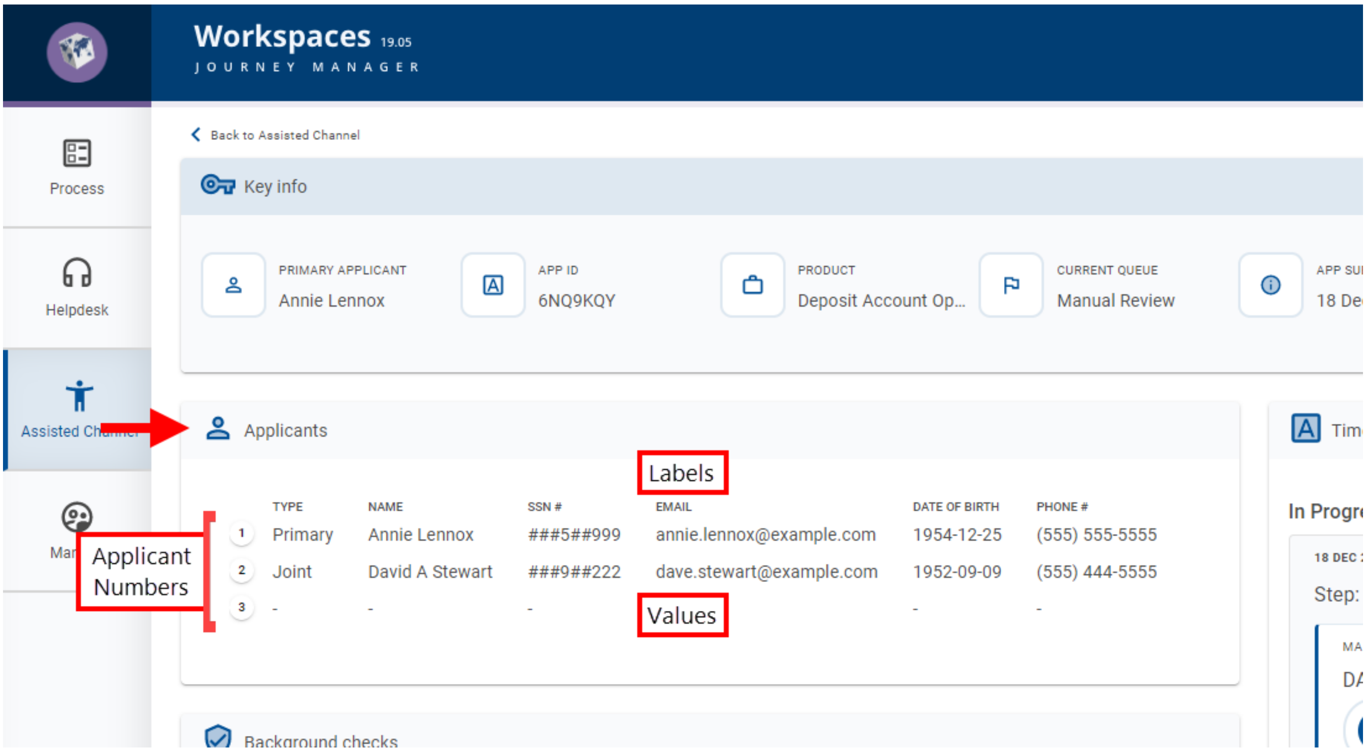
Some background checks have additional information associated with them which can be useful to understand how the result was determined. The availability of additional information is indicated by a (Detail Link) icon to the right of the result; click the link to view the additional information.

The Background Checks section is highly configurable. The specific background checks displayed are configured by a Journey platform developer and cannot be changed by a Workspaces user.

Applicant Information in Workspaces 19.05 and earlier releases

Applicant Details

The **Applicants** card displays a brief read-only view of personal information that helps you to identify each applicant.

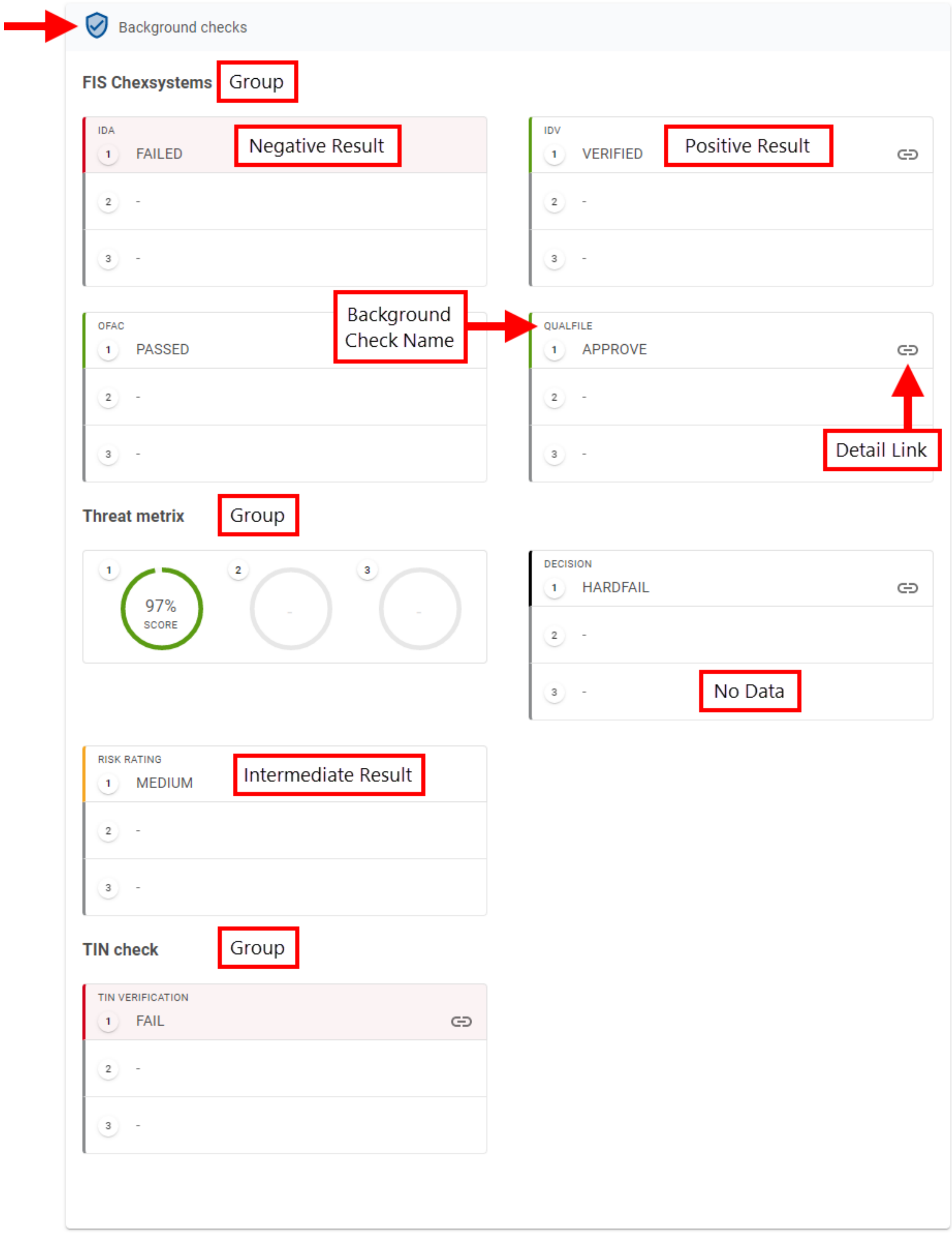


Personal information, which could include Personally Identifiable Information (PII) such as full name or email address, is displayed for primary and secondary applicants, with each applicant's details shown separately. A minimum of three applicants are shown; if there are less than three applicants, those that are not applicable are shown with no data. Each applicant is identified uniquely by an Applicant Number icon which is used elsewhere on this screen to connect information to a specific applicant.

> The number of applicants displayed is configurable. While the default configuration has three applicants, your Workspaces portal may have more (or less).

The specific information items displayed and their arrangement in this card are configured by a Workspaces developer and cannot be changed by a Workspaces user.

Background Checks



The background checks are displayed in groups, showing the name of each background check and the corresponding results. Separate results are shown for each applicant. A minimum of three applicants are shown; if there are less than three applicants, those that are not applicable are shown with no data. Applicant Number icons are used to identify the applicant that each background check relates to.

> The number of applicants displayed is configurable. While the default configuration has three applicants, your Workspaces portal may have more (or less).

The result of each background check is reinforced through the use of color. Workspaces supports a set of standard colors that can be associated with various results or states. Here are the available colors and some suggestions for how they might be used.

- **Green, Light Green** – Indicate positive results.
- **Red, Black** – Indicate negative results.
- **Blue** – Used for neutral states.
- **Orange** – Represents intermediate or other states.

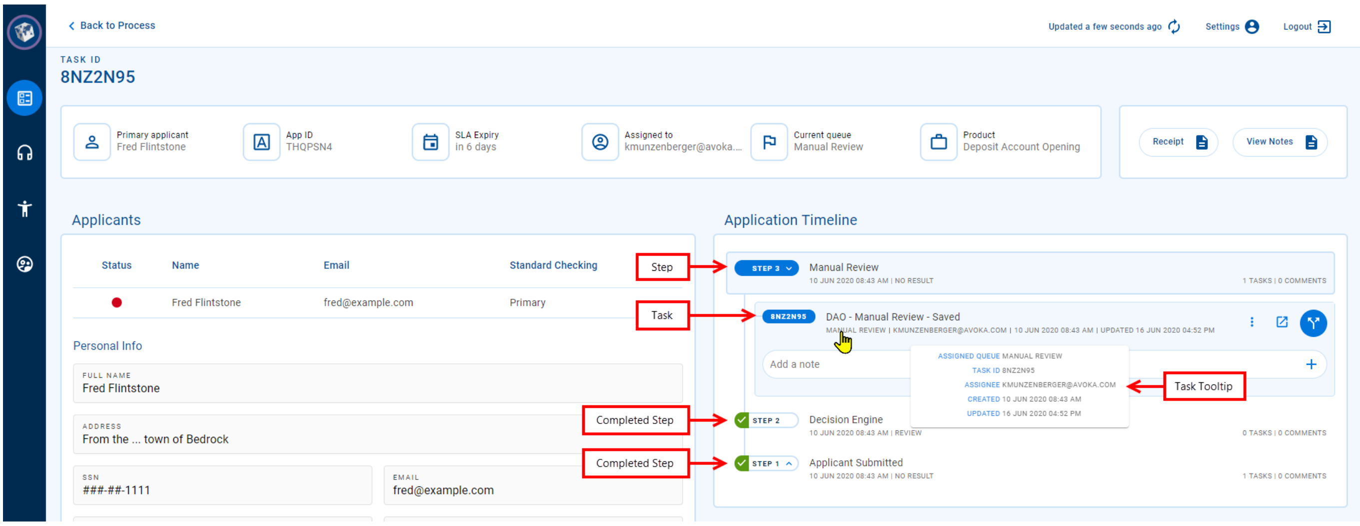
Some background checks have additional information associated with them which can be useful to understand how the result was determined. The availability of additional information is indicated by a (Detail Link) icon to the right of the result; click the link to view the additional information.

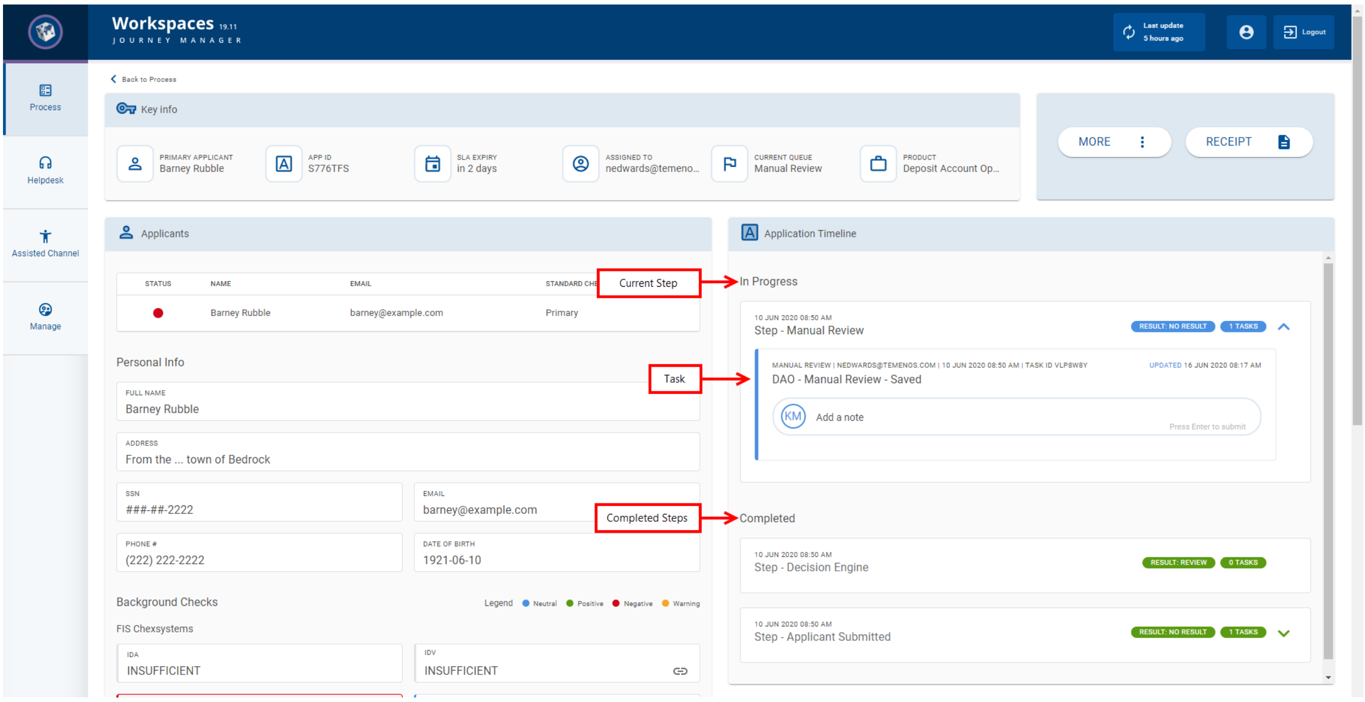
The is highly configurable. The specific background checks displayed on this card are configured by a Journey platform developer and cannot be changed by a Workspaces user.

Application Timeline | 20.05

The Application Timeline displays important information and accompanying notes relating to steps and tasks in the application's history.

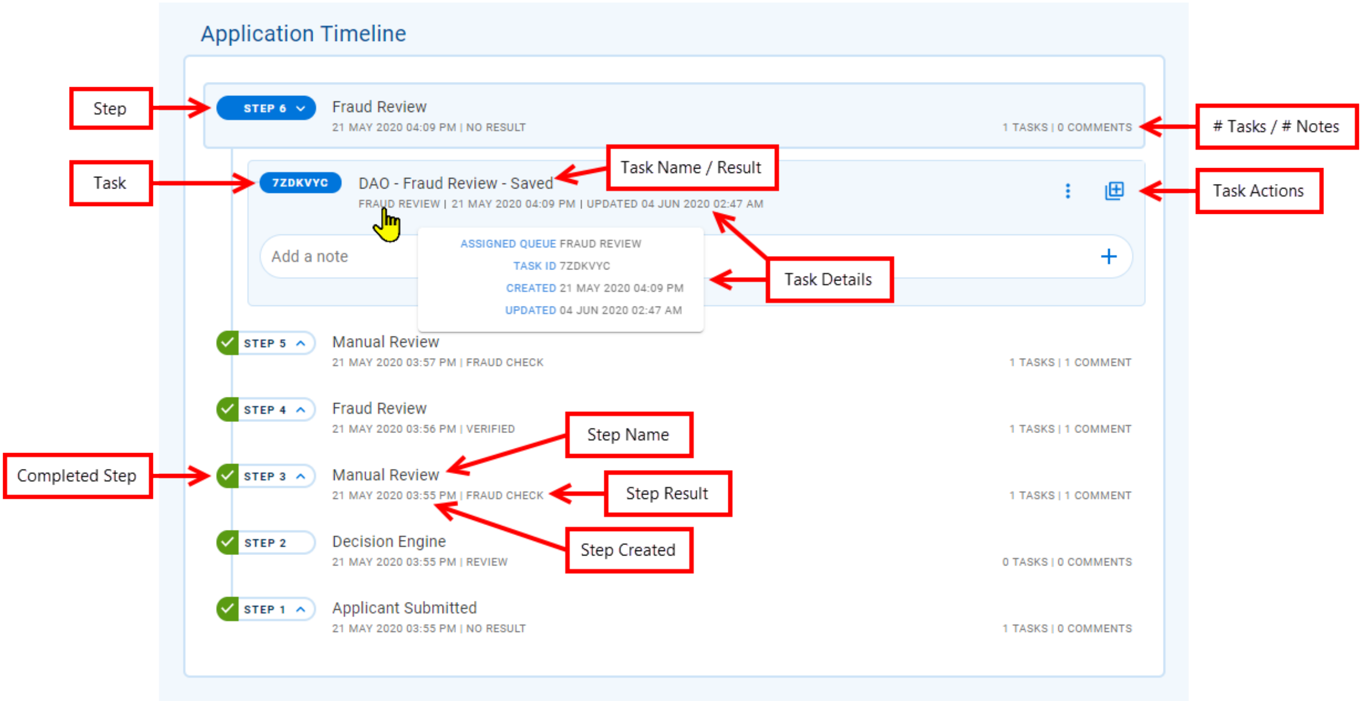
20.05 and later Prior to 20.05





The step that is currently in progress is shown at the top of the Application Timeline followed by the completed steps listed in order of creation with the oldest step at the bottom.

Application Timeline in Workspaces 20.05



Each step in the Application Timeline is represented by a separate timeline item which is generally associated with one or more tasks, although a step that is processed automatically by the system may not have any tasks. By default, timeline items appear in a collapsed state, showing summary information relating to the step. However, you can click a timeline item to expand it and reveal more details about the step or task. In fact, the timeline always has just a single step expanded showing all of the tasks associated with the step. As a result, if you click a step to expand it, the previously expanded step will collapse, hiding its tasks. Note that a step that does not have any associated tasks cannot be expanded.

When a step is collapsed, the following details are shown\:

- The step name. This may be the same as the name of the queue that the task is or was sourced from, except for the oldest task whose name identifies it as the task that was created when the application was submitted.
- The date/time that the step was created.
- The step's result, or "NO RESULT" if it is not yet determined.
- The number of tasks associated with the step.
- The number of notes made against tasks belonging to the step.

When a step is expanded, you can see the step's tasks, each of which includes the following details:

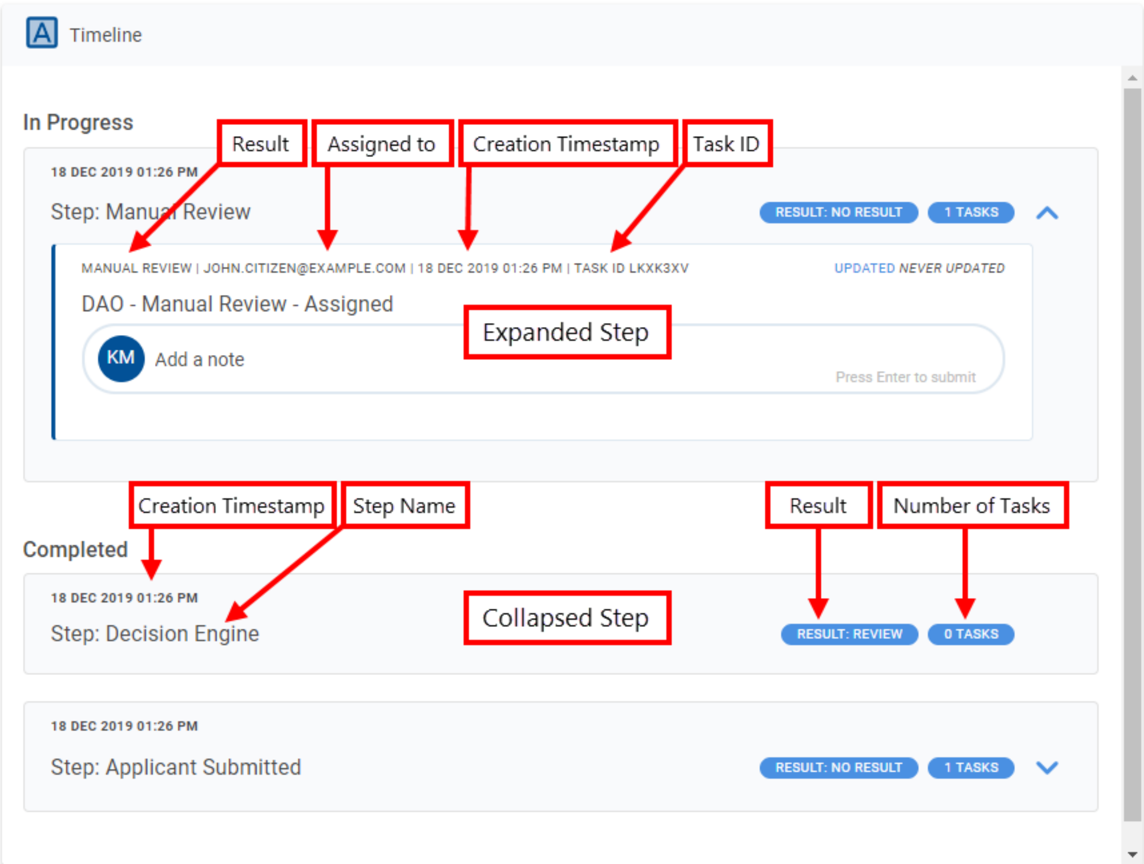
- The name of the queue that the task is or was sourced from.
- Who the task is or was assigned to (email address).
- The date/time that the task was created.
- The date/time that the task was most recently updated.
- The task ID; this is unique in your Workspaces portal.

This information can also be viewed in a formatted tooltip that appears when you point your cursor at the task.

When a step is expanded, you can select one of its tasks which causes the Details page to be reloaded, showing the application in the context of the selected task. Selecting a task also reveals the available task-related actions that can be performed on the task, and any notes entered against the task. (If, instead, you want to view all of the notes for all tasks in an application, click View Notes in the Actions panel.) Further, if the step has not been completed, you can enter a note against the selected task to record additional information about the task or its associated step.

The Note field is limited to 2000 characters.

Application Timeline in Workspaces 19.11 and earlier



Each step in the Timeline is displayed in a separate Step History card. Each step generally corresponds to a single task associated with the application. Only one step is expanded at any time; clicking a step collapses the step that was open. Initially, all of the completed steps are collapsed with just the step that is in progress expanded, but any step can be expanded to view more information.

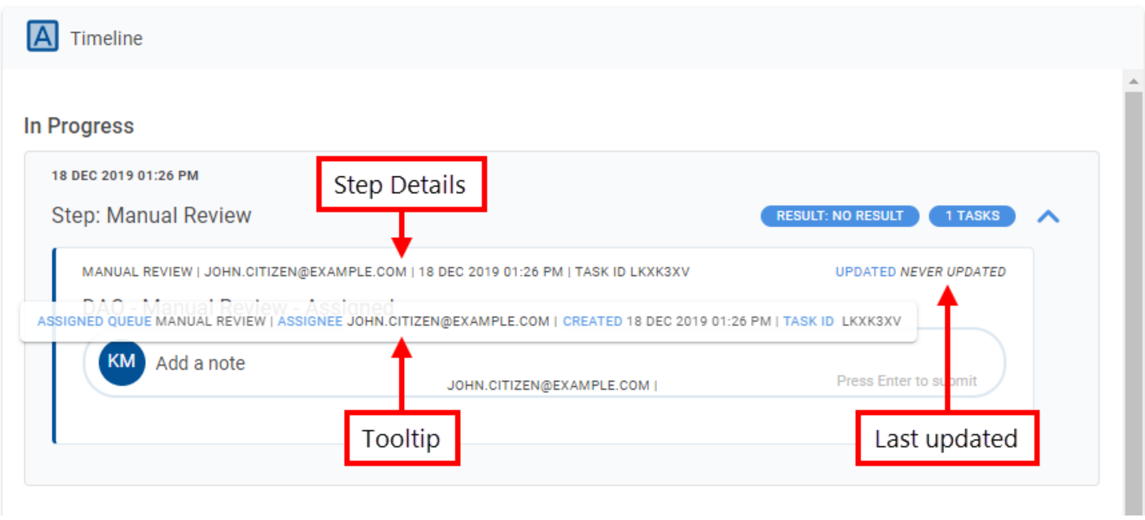
When a step is collapsed, the following details are shown\:

- The step name. This may be the same as the name of the queue that the task is or was sourced from, except for the oldest task whose name identifies it as the task that was created when the application was submitted.
- The date/time that the step was created.
- The current (In Progress) or final (Completed) result for the step.
- The number of tasks associated with the step.

When a step is expanded, you can see the step's task which includes the following details:

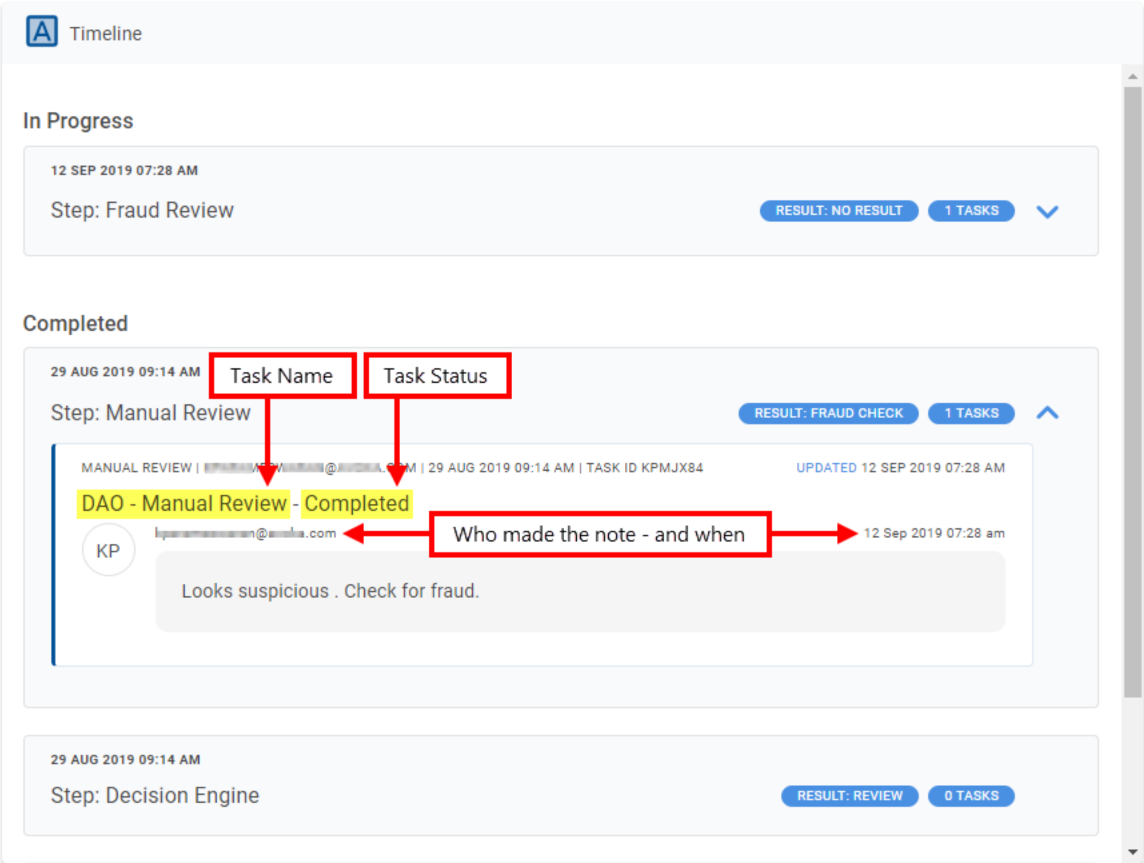
- The name of the queue that the task is or was sourced from.
- Who the task is or was assigned to (email address).
- The date/time that the task was created.
- The date/time that the task was most recently updated.
- The task ID; this is unique in your Workspaces portal.

If you point your cursor at these details, a formatted tool tip is displayed with labels identifying what each item is.



To the right of these details, the date/time that the task was last updated is displayed, and beneath them is the task name and status, followed by one or more notes.

While the current (In Progress) step is open, you can record information about the step by entering a note. You can add a note to any task of the step that is in progress. However, notes cannot be entered for older steps that have been completed. To add a note, select a task that has the placeholder text 'Add a note', then type in your note and press `Enter`. Notes are displayed in the reverse order in which they were made, with the newest notes at the top. Each note identifies the user that added the note (email address) and when the note was added (date/-time) above the note's text.



> The Note field is limited to 2000 characters.

Documents | 19.11

The processing of applications often requires that the information entered by applicants be corroborated against third-party evidence such as a drivers license or an energy bill. Managing the collection of this kind of documentary evidence is handled in Workspaces by the **Documents** card.

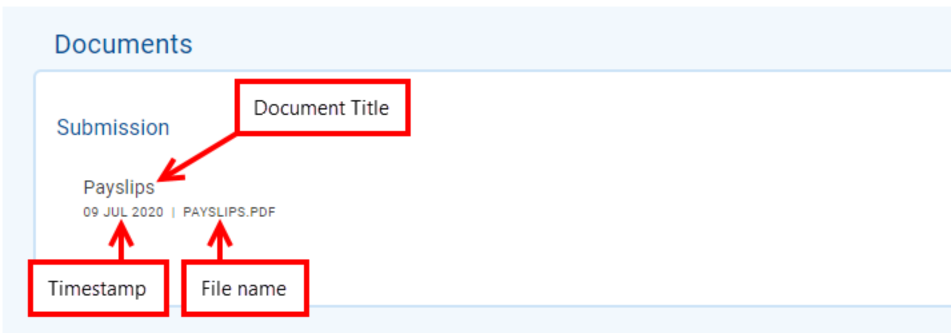
The Documents card provides a read-only view of the documents attached to an application as well as some system-level information relating to each document. Documents are usually uploaded by the applicant while filling out the form and attached to the application, but they may be provided by other means. For example, an application may be at a point where the applicant can no longer access it but needs to provide supporting documentation. In this case, the applicant may have the option to email the document to the person processing the application who then uploads and attaches it to the application.

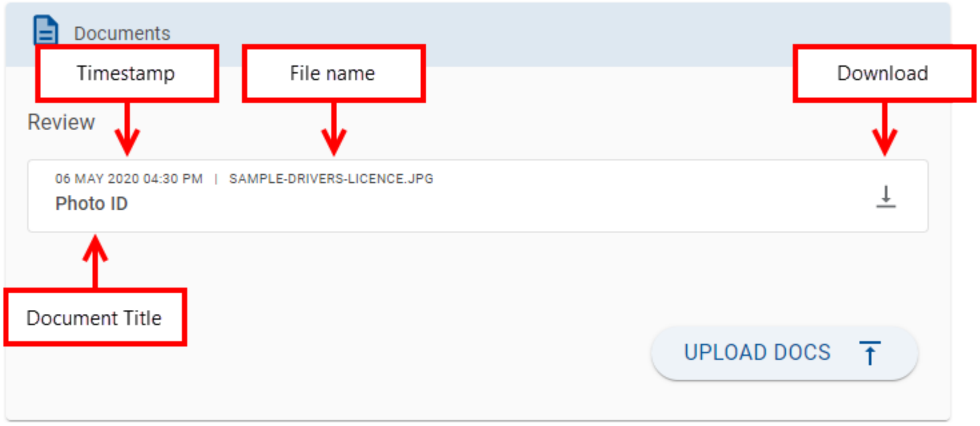
> In Workspaces 19.05 and earlier releases, duplicate documents were not permitted. (Workspaces considers two files to be duplicates if they have the same document title (description), the same file name, or if they are copies of the same file with different file names.) Workspaces 19.11 relaxes this constraint and allows duplicate files to be attached to an application.

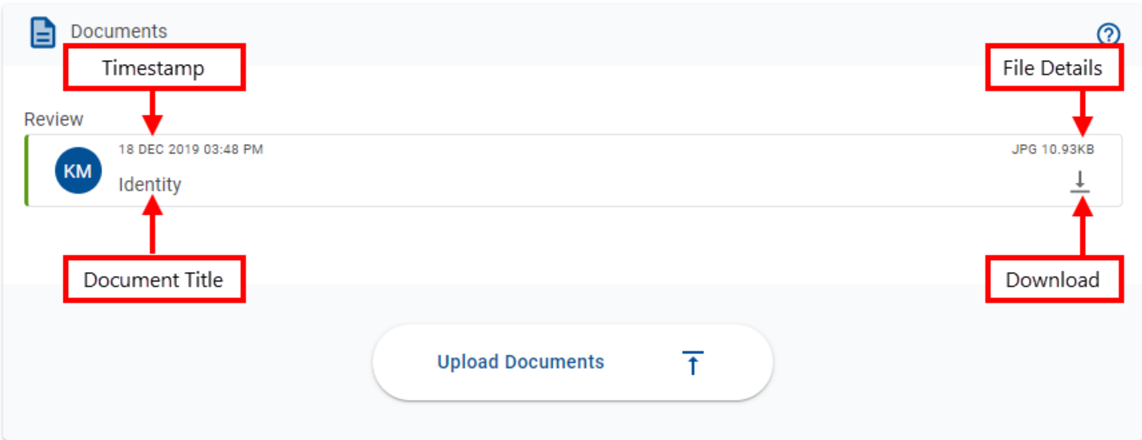
Each item in the Documents card contains the following elements.

- **Document Title:** The document title is entered by the user when uploading a document in Workspaces, or it may be assigned automatically if the document was uploaded by the applicant when filling in and submitting the application. The document title should identify the kind of information in the document file.
- **Uploaded Timestamp:** A timestamp that shows when the document file was uploaded and attached to the application.
- **File Details:** The specific file-level details displayed, and where they appear, depend on your Workspaces version, but may include file name, type or size. The images below show which file details are available for your Workspaces version.
- **Download:** On the right-hand side of each document item is a (Download) icon that you can click to download the document file.

20.05 and later 19.11 Prior to 19.11







In Workspaces 19.05 and earlier releases, a circular avatar was displayed on the left-hand side of each document item identifying who uploaded the document. This avatar has been removed in Workspaces 19.11. | 19.11

A Workspaces user cannot change the way documents appear on the Documents card, however they can upload and manage the documents attached to an application.

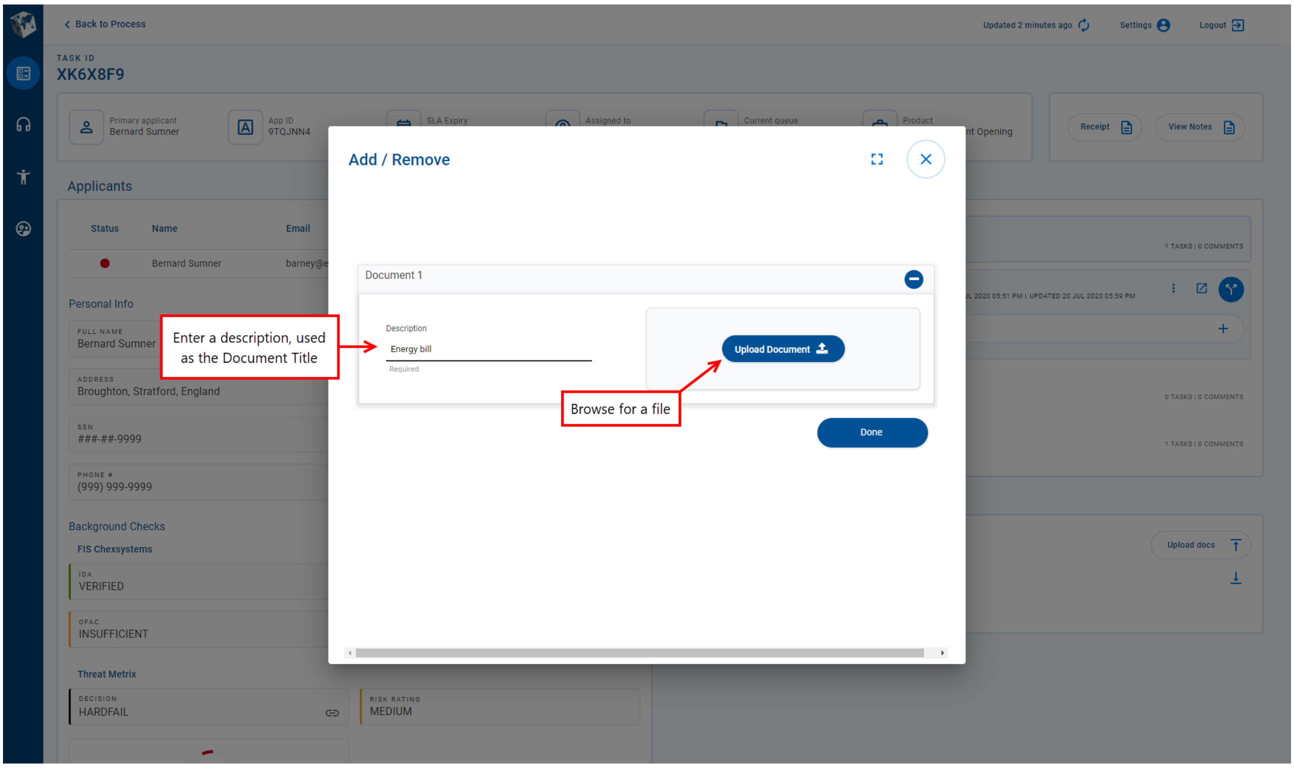
Upload a Document

While processing a task that is assigned to you, you may need to upload (attach) additional documents to the application. You can upload a document from a Details screen only, not from a List screen, and from any space.

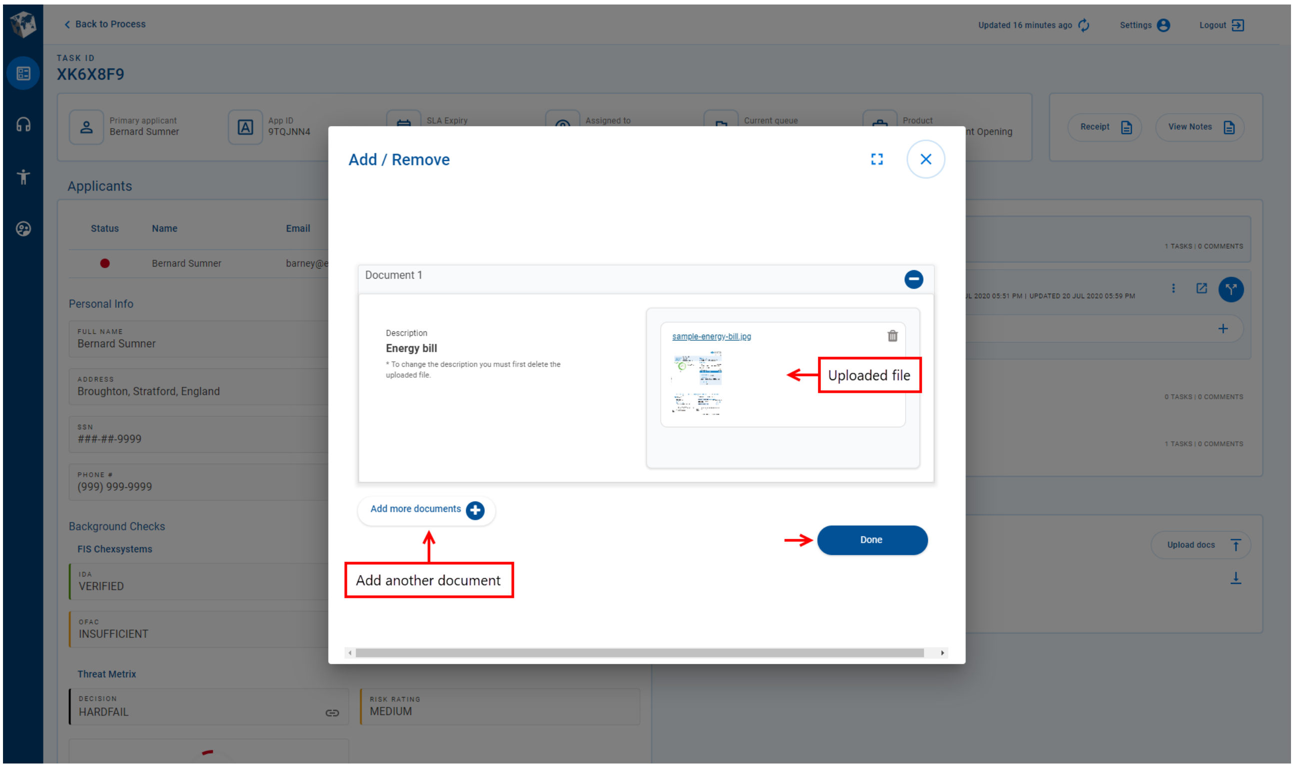
> In Workspaces 19.05 and earlier releases, you can only upload documents for tasks that are assigned to you. Workspaces 19.11 relaxes this constraint and allows a Workspaces portal to be configured so that you can upload a document to any application, even if it is not assigned to you. This behavior is enabled in the default configuration for Workspaces 19.11.

To upload a document on the Details screen:

1. Click **Upload Docs** (**Upload Documents** in Workspaces 19.05 and earlier). This option is available only for tasks that are assigned to you.
2. Enter a document description. The **Upload Document** button becomes enabled.



3. Click **Upload Document** and browse for the document file you want to upload, then select it and close the file browser dialog. The appearance of the file browser dialog and the way it behaves is dependent on your underlying operating system.



4. If you're finished uploading documents, then go to the next step. However, If you want to upload more documents, click **Add more documents** and repeat from step 2 above.

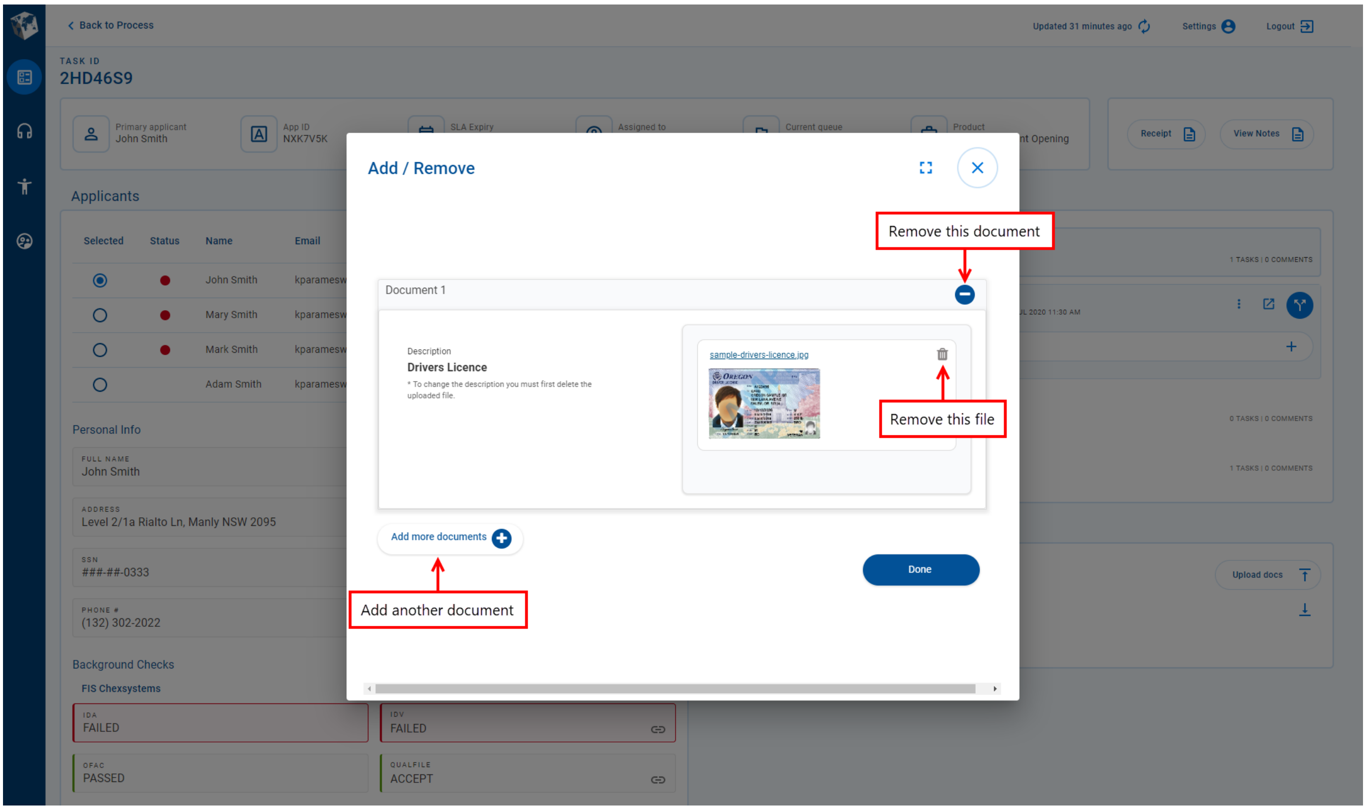
5. Click **Done** or ✕ (Close) when you're finished uploading documents.

Manage Application Attachments

Workspaces provides several options that allow you to manage the documents attached to an application. These options are available on the **Attached Documents - Add / Remove** modal window which you can display by clicking **Upload Docs** (**Upload Documents** in Workspaces 19.05 and earlier) on the Details screen.

- **Upload multiple documents** – Follow the steps above describing how to upload a document, and at step 4 follow the instructions to upload more documents.
- **Upload a different file for an existing document** – With the **Attached Documents - Add / Remove** modal window open, locate the document you want to modify. Click (missing or bad snippet) adjacent to the file that is to be replaced, thereby removing the attached file. Now, follow the instructions in Upload a Document above from step 3 to upload a different file and attach it to this document.
- **Remove a document** – With the **Attached Documents - Add / Remove** modal window open, locate the document you want to remove and click (missing or bad snippet) adjacent to this document.

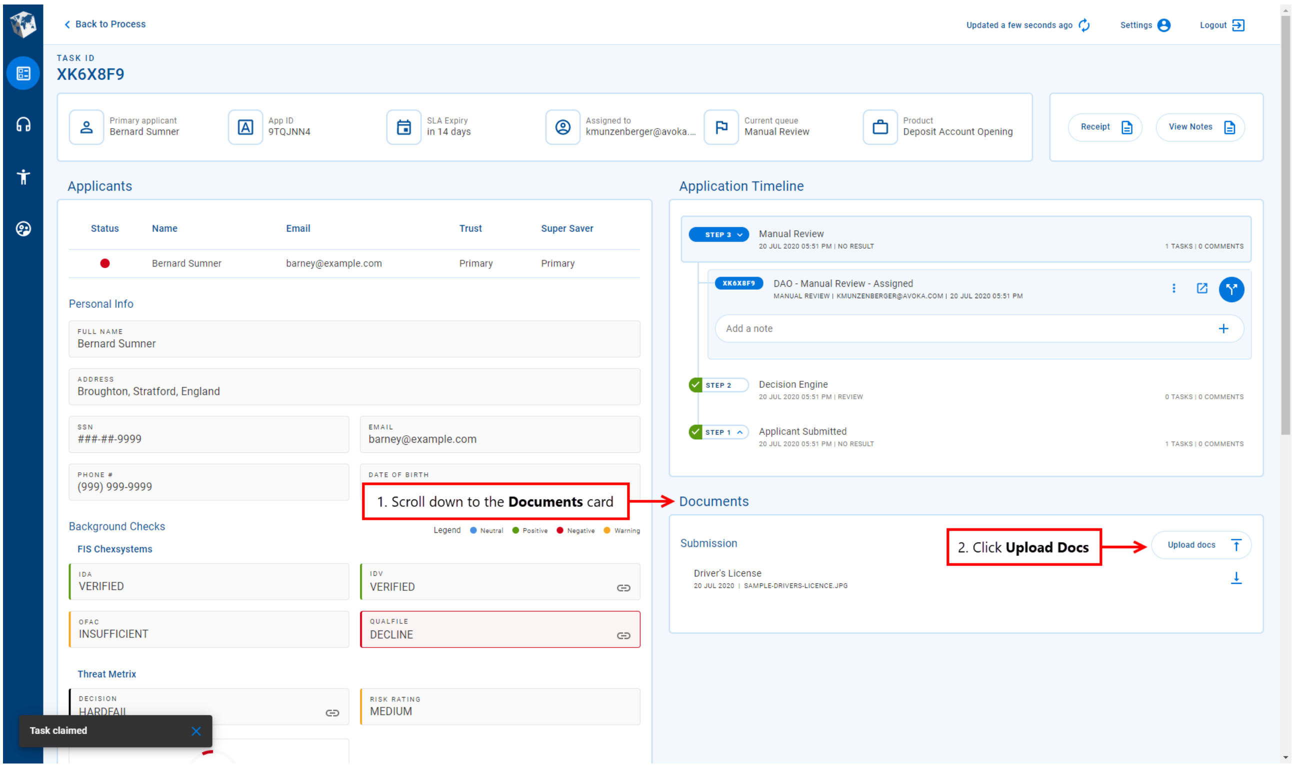
The following image shows where you can find the various attachment management features.



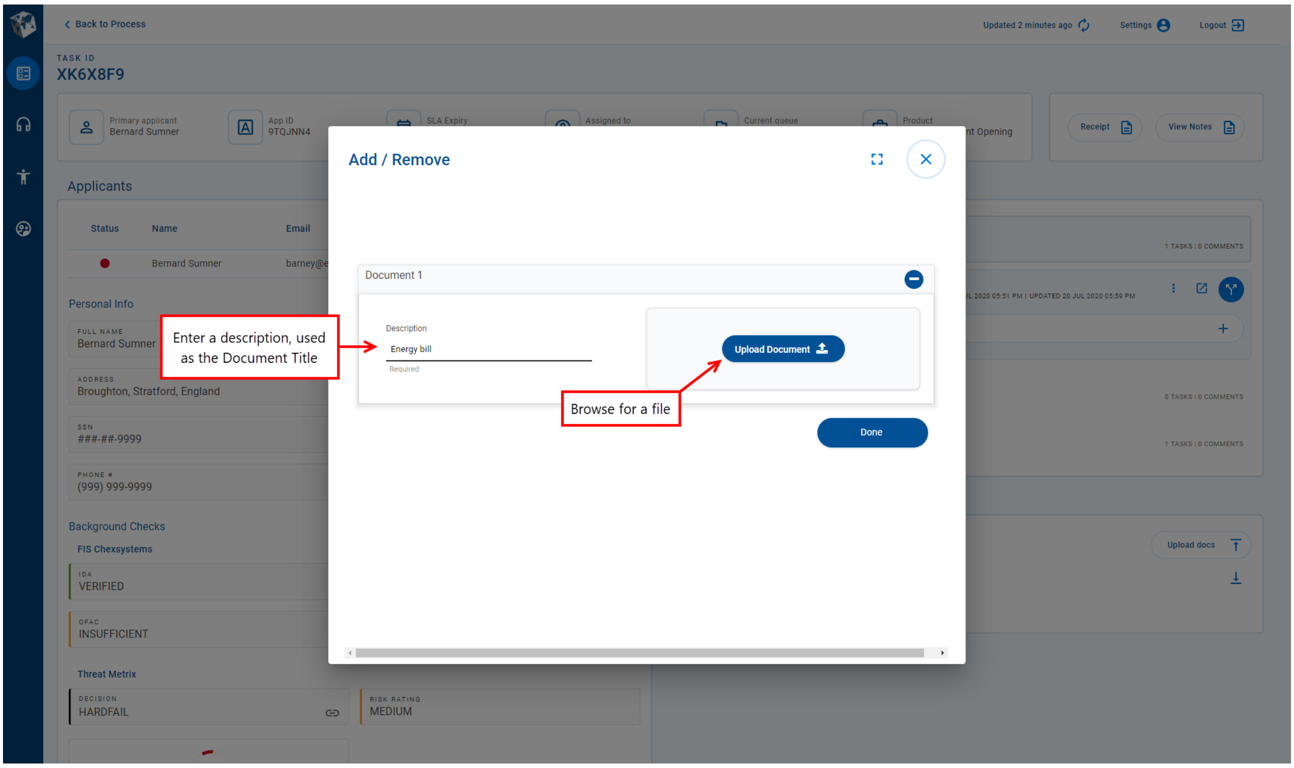
Upload a Document Example

This example shows how someone who is processing applications can upload an identity document, in this case a drivers license, to an application for an assigned task. It is assumed that you know how to find a task that is assigned to you, or how to find an unassigned task and claim it. This is important because you can only upload documents for tasks that are assigned to you.

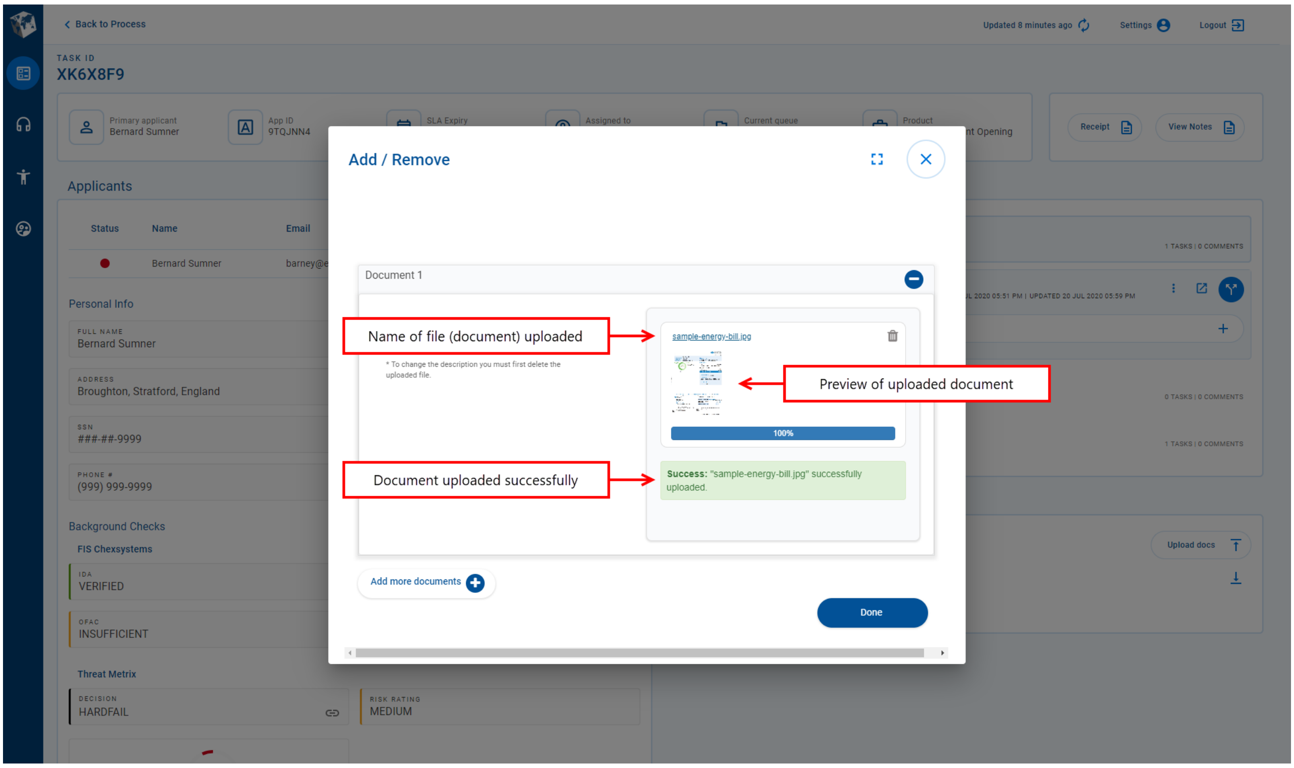
1. Login to Workspaces and select the **Process** space.
2. Locate a task assigned to you, or find and claim an unassigned task, then select the task to display the task's details.
3. On the Details screen, scroll down to reveal the **Documents** card in the lower right-hand corner of the screen, then click **Upload Docs** (**Upload Documents** in Workspaces 19.05 and earlier) to open the **Attached Documents - Add/ Remove** modal window.



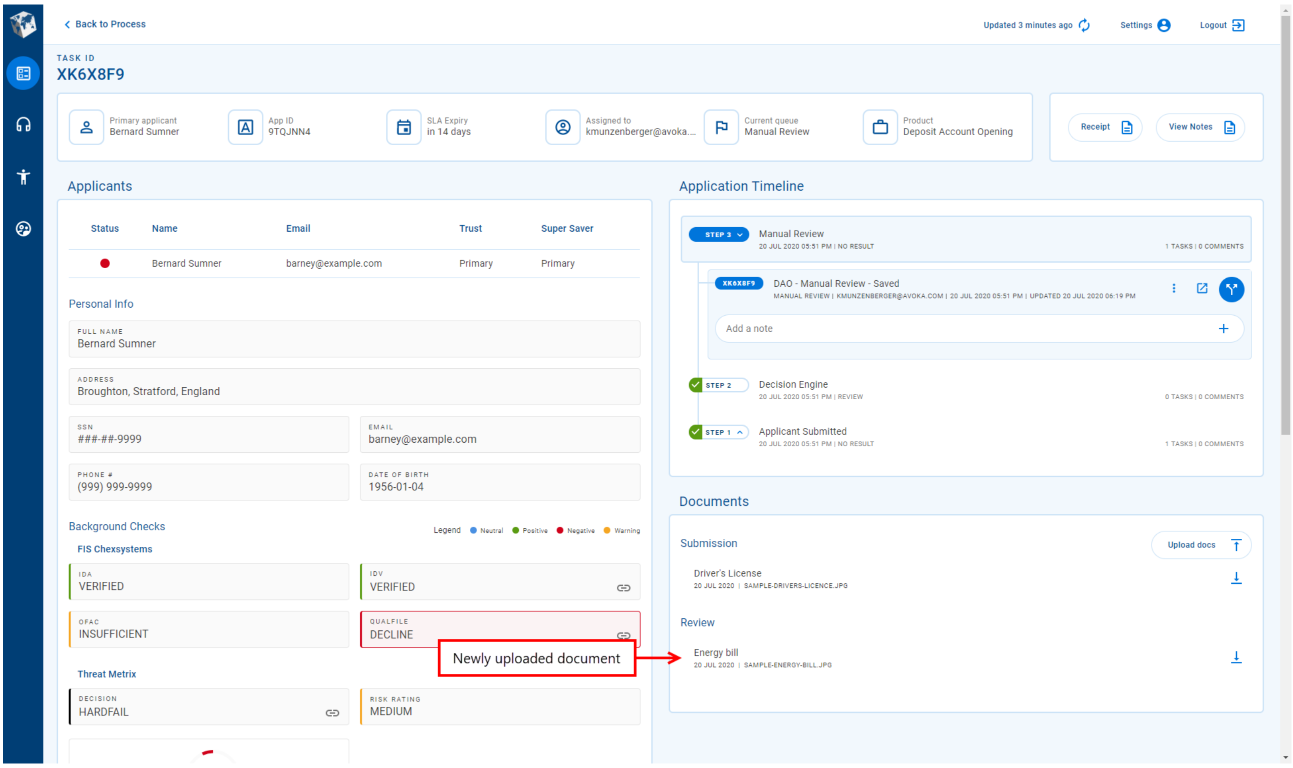
4. Enter a description for the document that you want to upload. Note that the **Upload Document** button on the right is disabled until you enter something in the description field.



5. Click **Upload Document**, then browse to and select the document file you want to upload. A message is displayed briefly confirming that the document has been uploaded successfully.



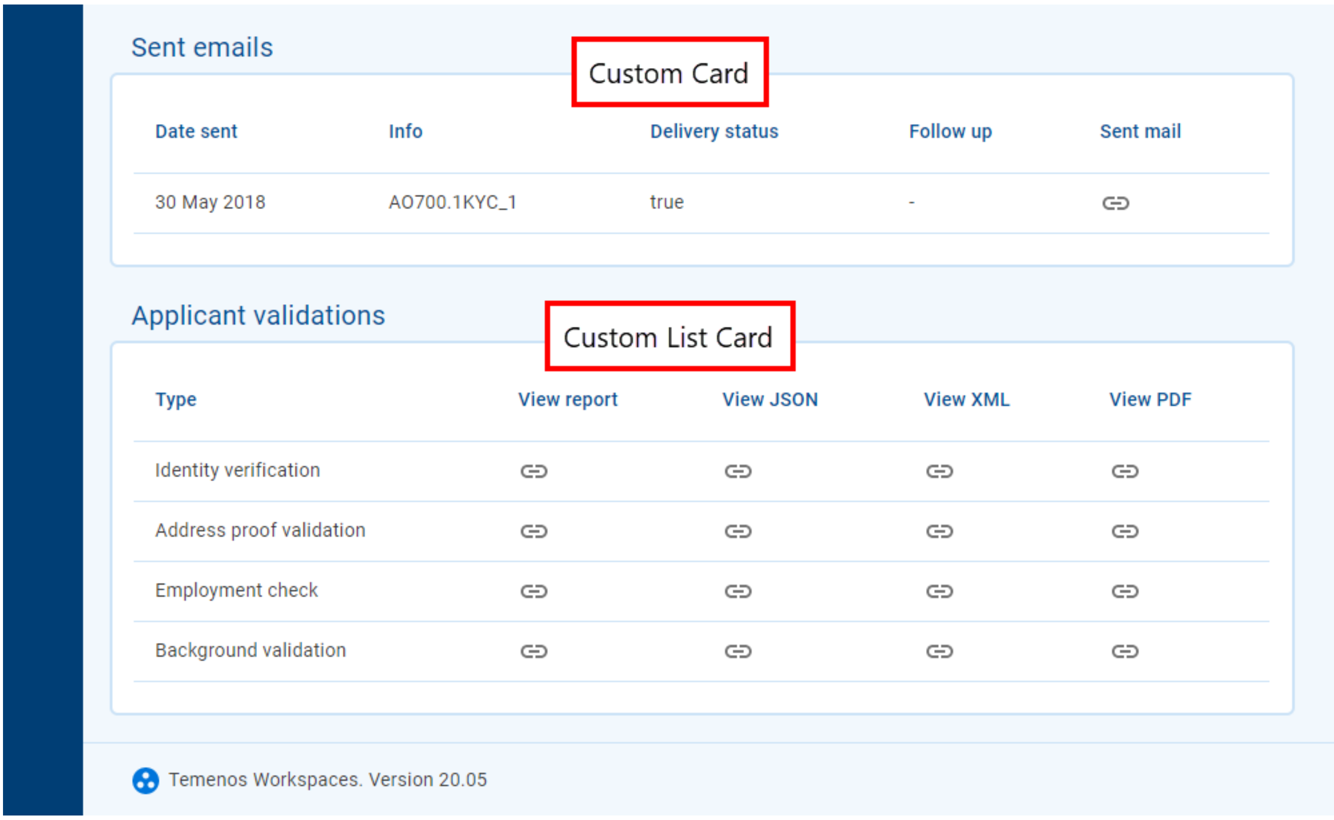
6. Click **Done** to close the **Attached Documents - Add/ Remove** modal window and return to the Details screen.



A new document item appears in the **Documents** card for the document you just uploaded.

Custom Information

In addition to the information displayed on the predefined cards, other important information can be displayed in custom cards. Two formats are supported: a standard custom card to display a set of single-value data and a list custom card that can display lists or tabular data.



A standard custom card is configured to display a set of data items and a single value for each data item. By contrast, the list custom card displays data in a tabular format with each column representing a different data item and each row being a related set of values. A (Detail Link) icon may be displayed for any data item; click the link icon to display more information about the data item in a pop-up window.

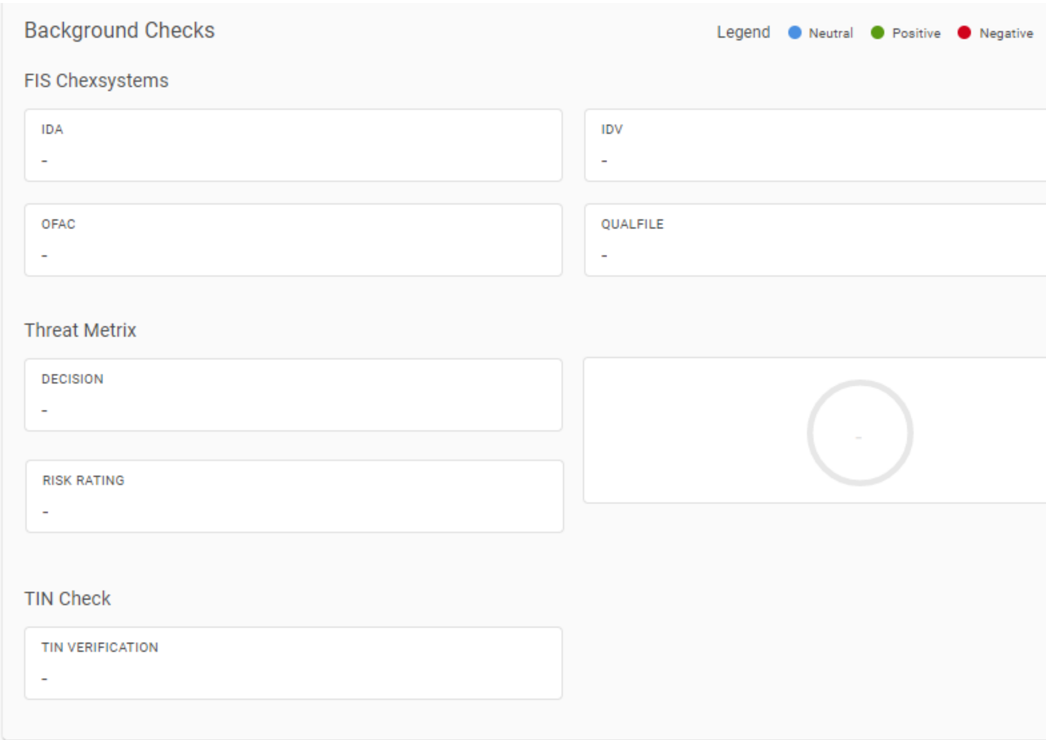
> In addition to standard data values and data links, custom cards also support download links. Click a download link to download the target file associated with the link.

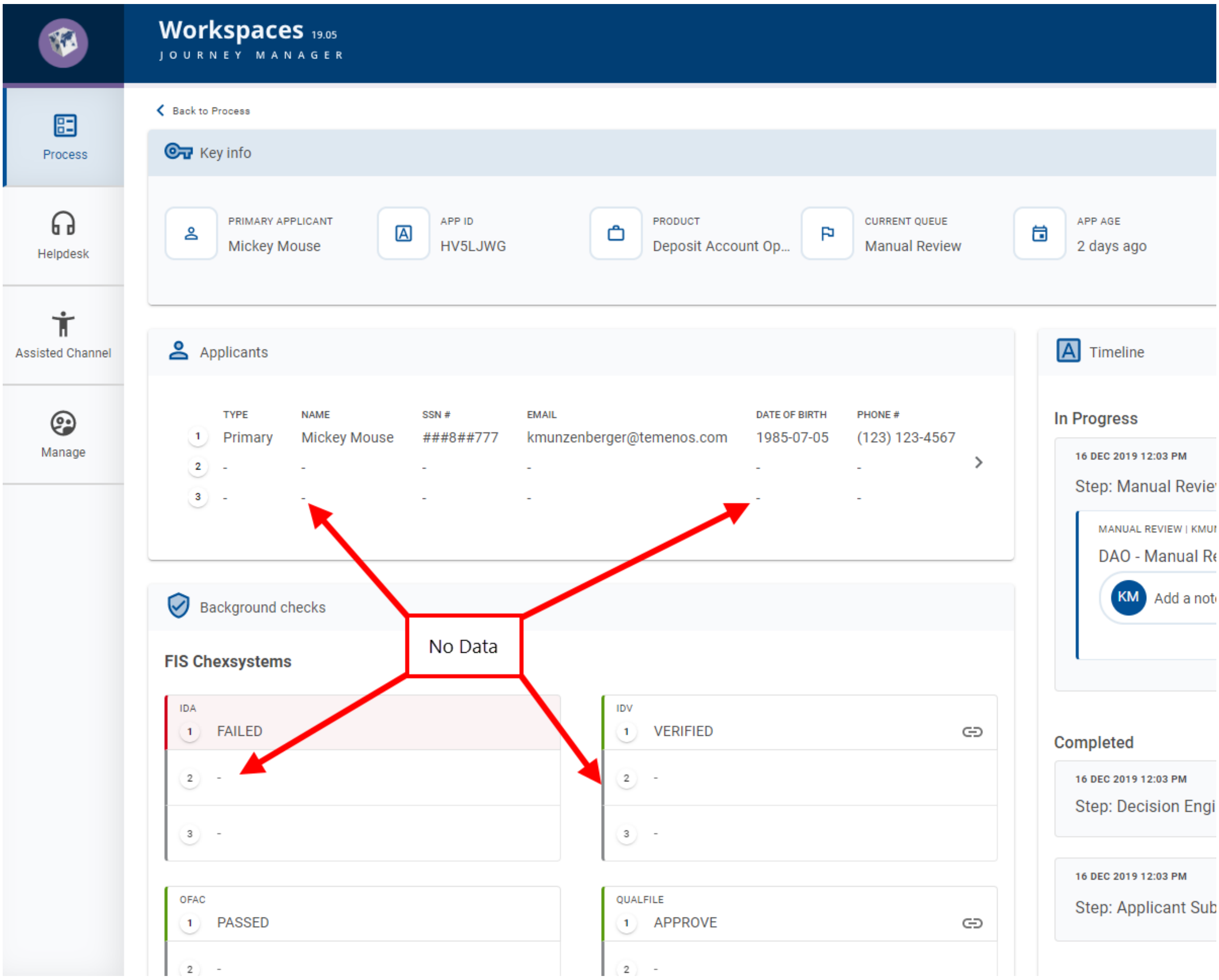
Custom cards are configured by a Workspaces developer. They provide a read-only view of the information presented. A Workspaces user has no control over the way these cards appear and cannot modify the displayed data.

No Data scenario

Sometimes, data may not be available in Workspaces for one or more data items. This could be because the expected data does not exist (for example, has not been collected) or because a technical issue prevents Workspaces from being able to obtain the data. Workspaces indicates that expected data is not available by displaying a dash '– ' instead of the data value. The lack of data is reinforced by the use of gray color for UI elements relating to these data items.

19.11 and later Prior to 19.11





Workspaces can also be configured to hide items with no data, so you may not even see fields or records with no data.

Workspaces Actions

Workspaces | Workspaces User | 18.11 | 20.05

Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

Workspaces provides a set of standard actions for working with applications and tasks. All of the standard actions are available in the default configuration. In addition to the standard actions, Workspaces also supports the configuration of custom actions that allow your Workspaces portal to be extended with functionality that is not available in the default configuration.

The standard actions relating to applications are:

- New Application – Start a new application in the Applicant space.
- New Form – Start a new application on behalf of someone else.
- Receipt – See a read-only view of a submitted application.
- Resume – Resume an unsubmitted application in a modal window.
- View Notes – View all of the notes from all of an application's tasks.

The standard actions relating to tasks are:

- Assign – Assign a task to a Workspaces user.
- Claim – Assign a task to yourself.
- Decision – Take a decision about a task's outcome.
- Recover – Recover an abandoned or withdrawn application so that the applicant can continue with it.
- Release – Remove a task assignment for a task assigned to you.
- Unassign – Remove a task assignment for any task.
- View Form – See a read-only view of an application that has been saved but not yet submitted.
- Withdraw – Cancel an application that has been saved but not yet submitted.

While each of these actions is described separately, more information about how to use each action is available in other topics.

- To learn more about how the Claim, Release, and Decision actions are used when reviewing applications, see Process Actions.
- To learn more about the View Form, Recover and Withdraw actions, see Helpdesk Actions.
- To learn more about the New Form action, see Assisted Channel Actions.
- To learn more about managing task assignment with the Assign and Unassign actions, see Manage Actions.
- To learn more about working with tasks in the Applicant space, see Applicant space Actions.

Standard Actions | 21.11

Standard actions expose the core Workspaces functionality that enables you to process applications, respond to helpdesk inquiries, assist customers, or manage your team's workload.

Each standard action is associated (via configuration) with one or more spaces. For the spaces in the default configuration, the standard actions available in each space are as follows.

- **Process** - Claim, Decision, Receipt, Release, View Notes
- **Helpdesk** - Receipt, Recover, View Form, View Notes, Withdraw
- **Assisted Channel** - Receipt, Recover, View Form, View Notes, Withdraw
- **Manage** - Assign, New Form, Receipt, Unassign, View Notes

The Receipt action is available for submitted applications in all spaces, and View Form is available for saved applications in the Helpdesk and Assisted Channel spaces, so you can always view the information entered by the applicant when you need to. Further, the View Notes action is available in all spaces so you can always view the notes that Workspaces users have made against an application which will help you understand an application's progress. Finally, note that only Assisted Channel users can kick-off new applications but these can subsequently be claimed or assigned to another user.

The standard actions available in other spaces are as follows.

- **Applicant** - New Form, Receipt, Recover, Resume, Withdraw

The Resume action is a new action introduced for the Applicant space and is only available in that space.

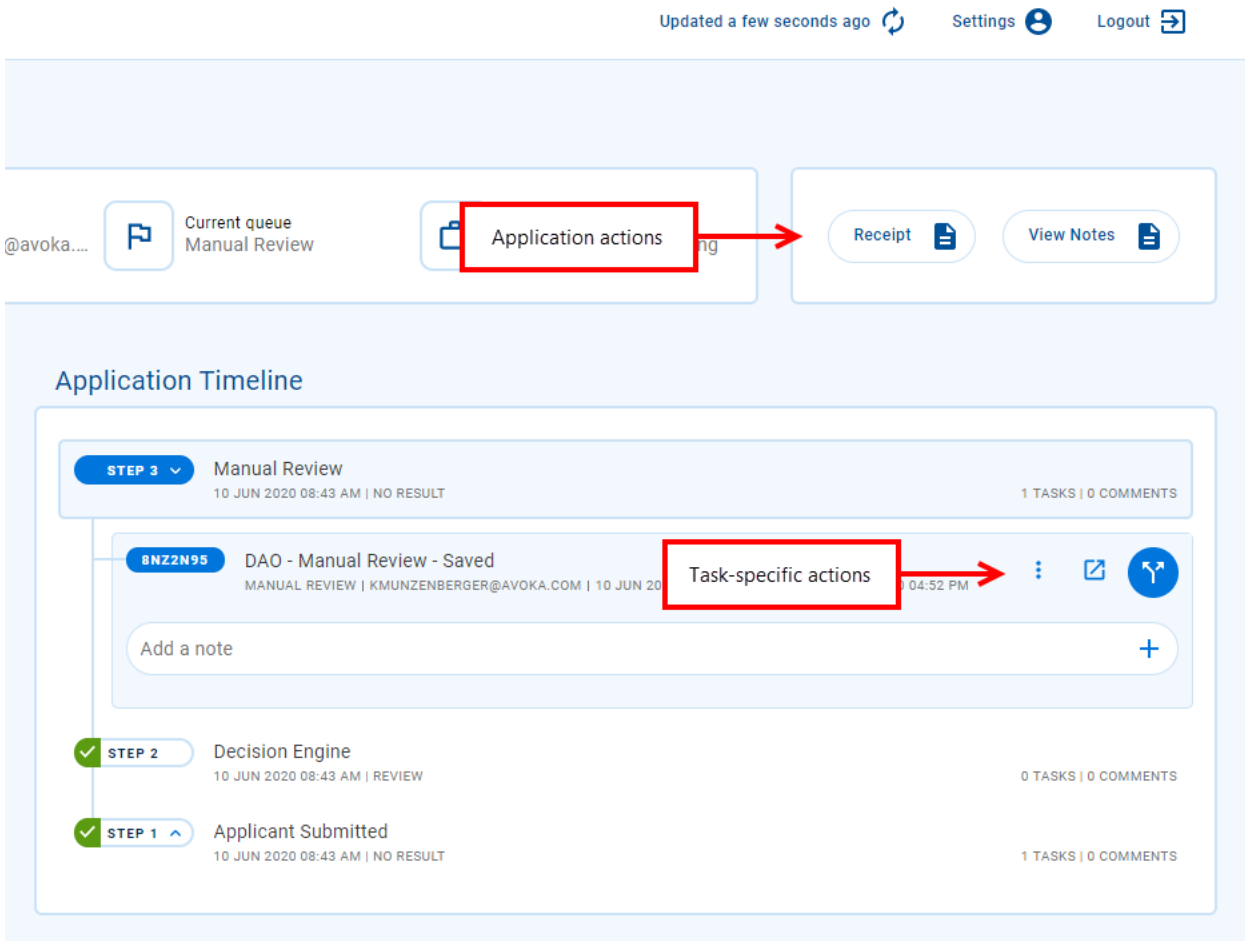
Associating an action with a space is just one way that Workspaces controls which actions are available for you to use on a task or application. Role-based configuration of permissions, and the current status of the task or application also contribute to determining whether an action is available for you to perform on a given task or application at any point in time. So, as you can see, while certain actions are only available in certain spaces, the availability of an action for a given application can change as the application progresses through its life cycle. For more information about how Workspaces controls what you can do, see Access Control.

Standard actions can be performed from any List or Details page. On a List page, actions are available as icon buttons on the right-hand side of each item in the item list. However, the way actions are made available on a Details page varies depending upon whether the action relates to an application or a task.

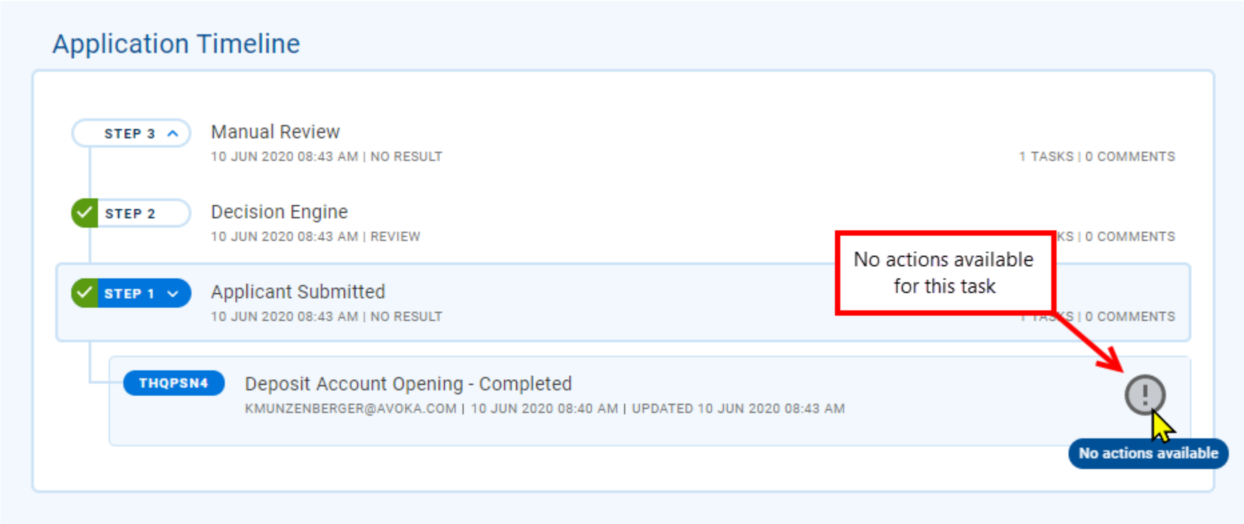
- For standard actions relating to applications, there are buttons in the Action panel to the right of the Key

Info card.

- For standard actions relating to tasks, there are icon buttons on each task in the Timeline.



Different actions may be available for each task as the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Assign action will not be available for a task that has been assigned to a user already. If there are no available actions for a task, Workspaces indicates this by displaying the  (No Actions Available) icon, instead of the usual action icon buttons, with the icon's gray color reinforcing the lack of available actions.



To perform a standard action, click the application or task button corresponding to the desired action. Most standard actions will display a brief message in the bottom right corner of the screen confirming that your desired action was successful or notifying you that something went wrong.

Custom Actions | 19.11

Workspaces supports custom actions that allow your Workspaces portal to be extended with functionality that is not available in the default configuration.

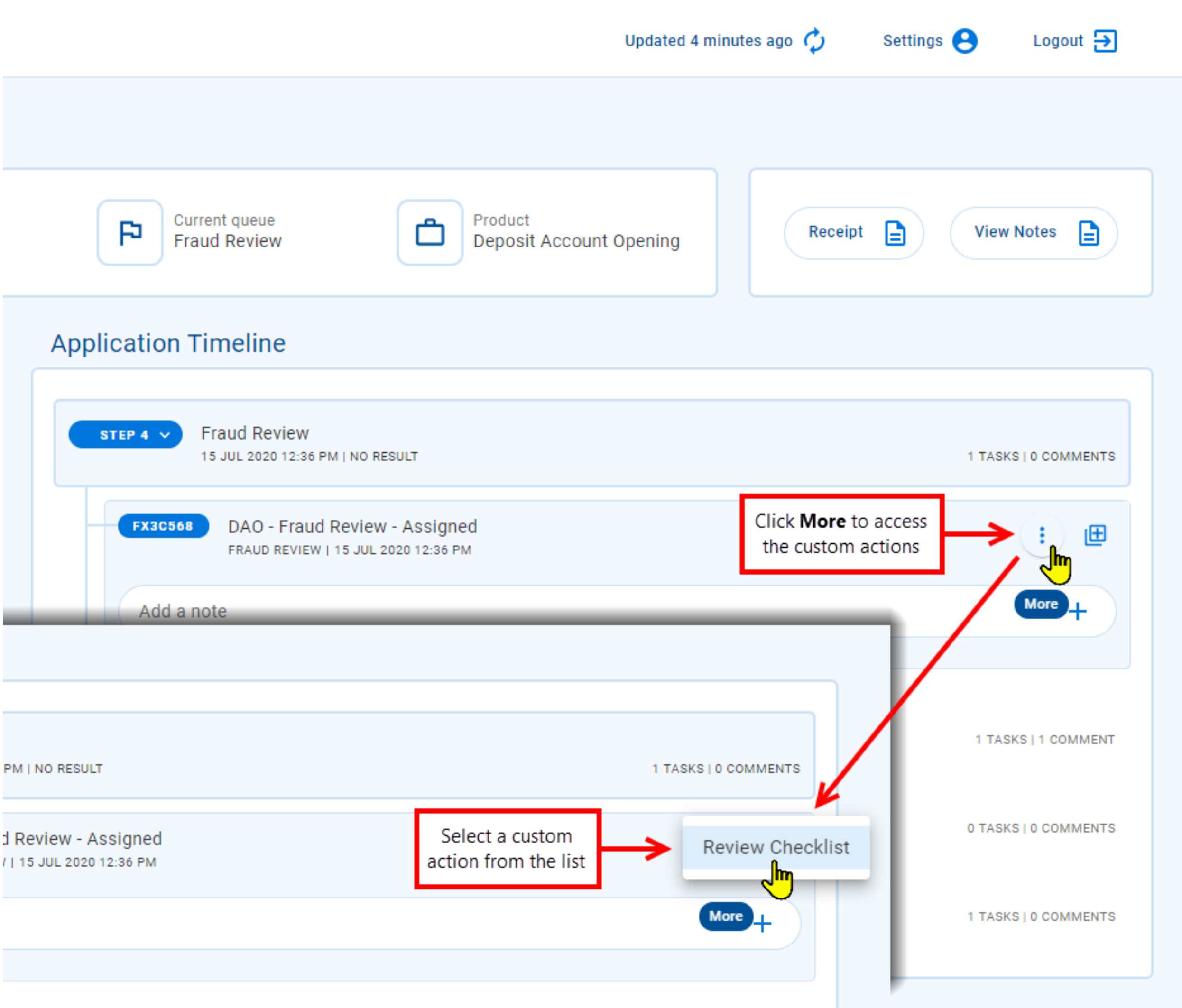
Custom actions can be performed from a Details page only. The available custom actions can be accessed via the **More** button in the action group to the right of the Key Info card on the Details page.

The default configuration of Workspaces does not include any custom actions. If custom actions are available in your Workspaces portal, these actions and what they do are specific to the configuration of your Workspaces portal and, hence, are not covered by this documentation.

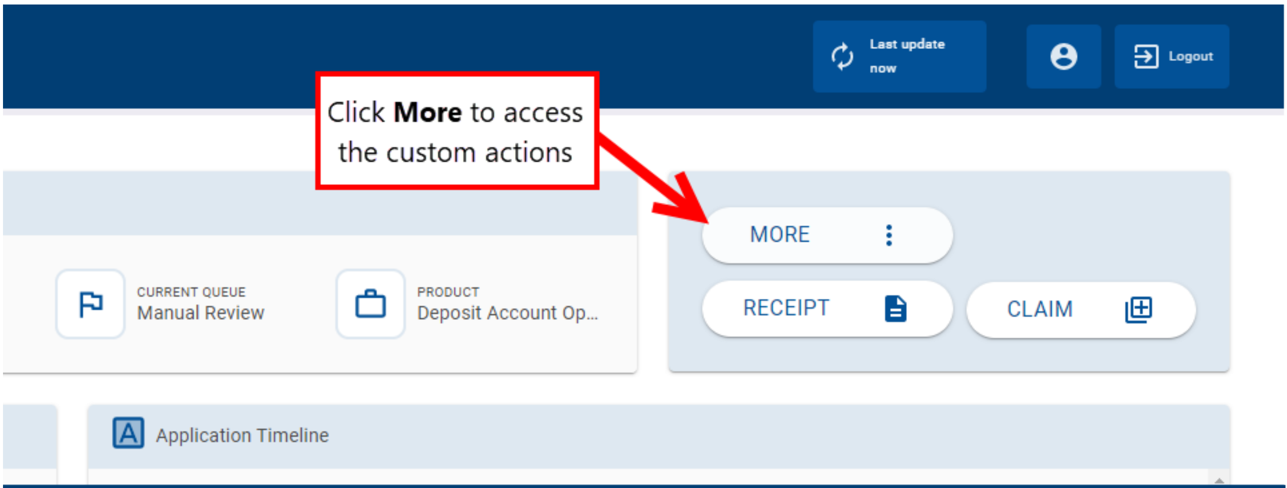
To perform a custom action:

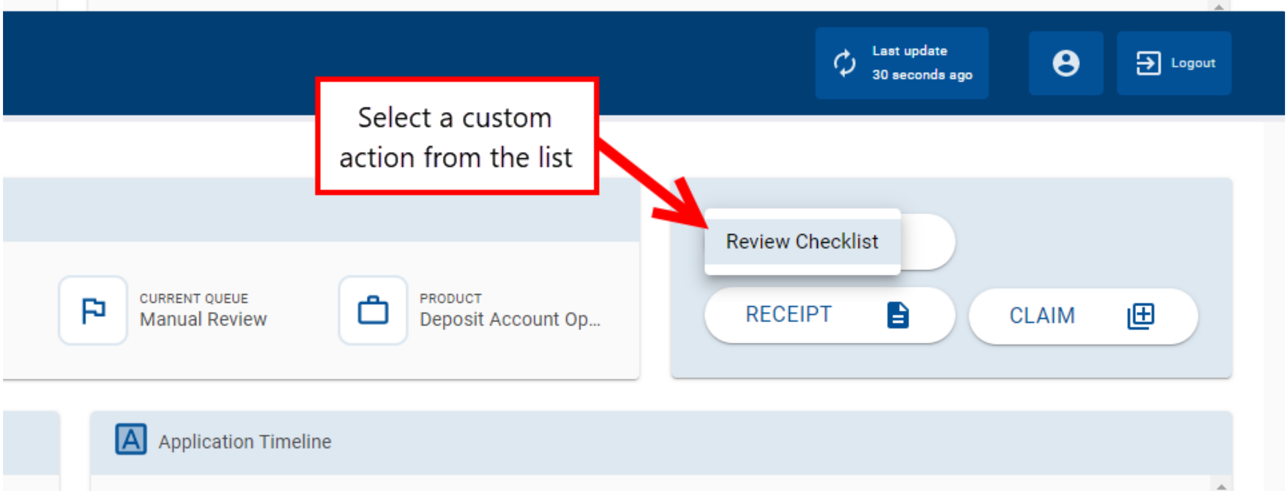
1. Select a task or application item from a List page to display it in the corresponding Details page.
2. Click the **More** button to display the list of available custom actions.
3. Select the desired action from the list.

20.05 and later | Prior to 20.05



Updated 4 minutes ago
Settings
Logout
Current queue
Fraud Review
Product
Deposit Account Opening
Receipt
View Notes
Application Timeline
STEP 4
Fraud Review
15 JUL 2020 12:36 PM | NO RESULT
1 TASKS | 0 COMMENTS
FX3C568
DAO - Fraud Review - Assigned
FRAUD REVIEW | 15 JUL 2020 12:36 PM
Click More to access the custom actions
Add a note
More
1 TASKS | 1 COMMENT
0 TASKS | 0 COMMENTS
1 TASKS | 0 COMMENTS
Select a custom action from the list
Review Checklist





Selecting a custom action initiates the functionality associated with the action. This may present a form or other interactive element to the user that they need to engage with in order to complete the action. Alternatively, a custom action may trigger some back-end functionality in Journey Manager or another back-end system. Regardless of what happens, when the custom action is complete, focus is returned to the Details page where the user initiated the custom action.

Assign – Assign a Task to a User

Workspaces | Workspaces User | 18.11 | 20.05

If you manage a team, you may need to schedule work to meet various needs; for example, to share work across your team, to accommodate team member absences, or to satisfy an **SLA**[1]. A user with access to the Manage space, such as a manager or a Workspaces administrator, can change task assignments to address any such needs.

To assign a task, you must be in the Manage space, and the task must be assignable to the target user. Two conditions must be met for a task to be assignable to a user:

- The task must not be assigned to anyone.
- The user must have the necessary permissions to access the task.

If both of these conditions are met, then the task can be assigned to the user.

If you want to assign a task that is assigned to someone already, you must first remove the task assignment by unassigning the task. However, if the task is assigned to you, you can release it instead.

To assign a task to a user from the Manage space's List page:

1. Select the Manage space.
2. On the List page, locate the task you want to claim in the item list.
3. Point your cursor at the task item – the available actions appear at the right-hand side.
4. Click **Assign** to display the list of Workspaces users.
5. Select a user from the list. The task is assigned to the selected user, and their Workspaces id is displayed in the **Assigned** column.

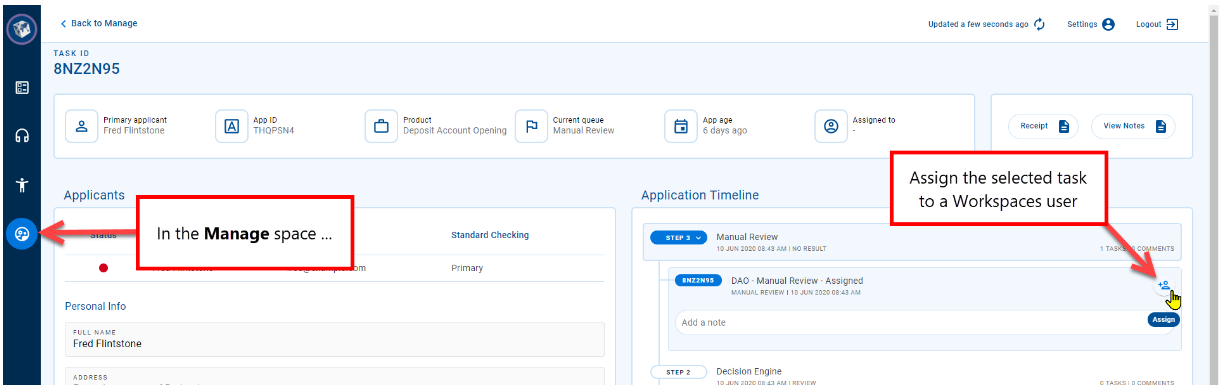
To assign a task to a user from the Manage space's Details page:

1. Select the Manage space.
2. On the List page, locate the task you want to claim in the item list, then select it to display the application details for the task.

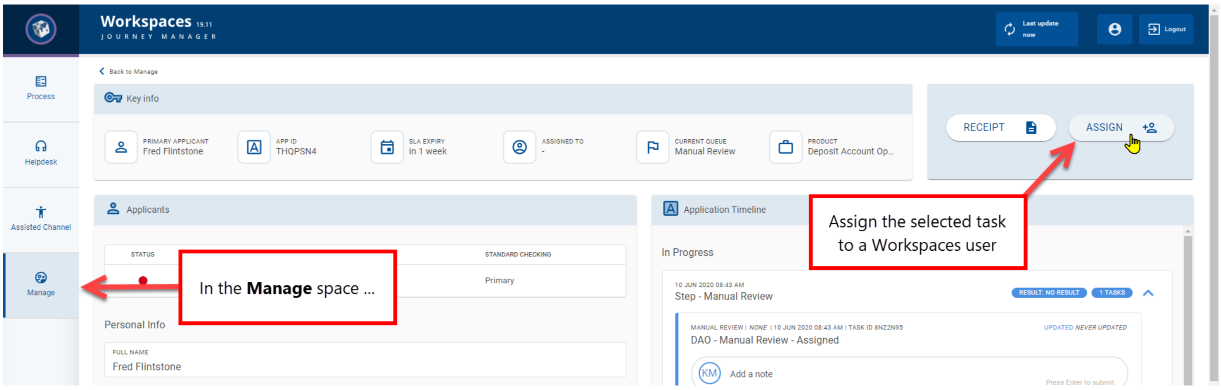
[1] A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

3. On the Details page, click a button to display the list of Workspaces users:

- **Workspaces v20.05** – Click the (Assign) icon button for the selected task in the Timeline.



- **Workspaces v19.11 and earlier** – Click the Assign button in the Action panel.



4. Select a user from the list. The task is assigned to the selected user, and their Workspaces id is displayed in the **Assigned To** field in the key information.

> The user list displays both the Workspaces user name and the user's full name for each user.

When you assign a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

Claim - Assign an Unassigned Task to Yourself

Workspaces | Workspaces User | 18.11 | 20.05

When you need to work on a task, it must be assigned to you first. You can assign a task to yourself by claiming it.

To claim a task, you must be in the Process or Helpdesk space. You can only claim a task that is not already assigned to someone. If you want to claim a task that has already been assigned to someone else, the task must be released or unassigned first. To learn about releasing tasks, see Release on this page. To learn about unassigning tasks, see Unassign on this page.

Further, you can only use the Claim action to assign a task to yourself, not to someone else. To learn about how to assign tasks to someone else, see Assign on this page.

To claim a task from a List page:

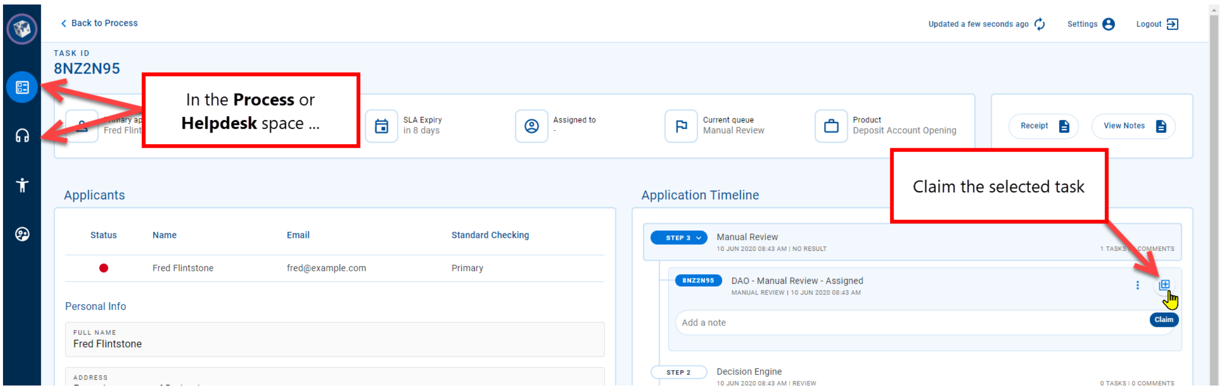
1. Select the Process or Helpdesk space.
2. On the List page, locate the task you want to claim in the item list.
3. Point your cursor at the task item – the available actions appear at the right-hand side.
4. Click (Claim) – the task is assigned to you, and your Workspaces id is displayed in the **Assigned** column.

To claim a task from a Details page:

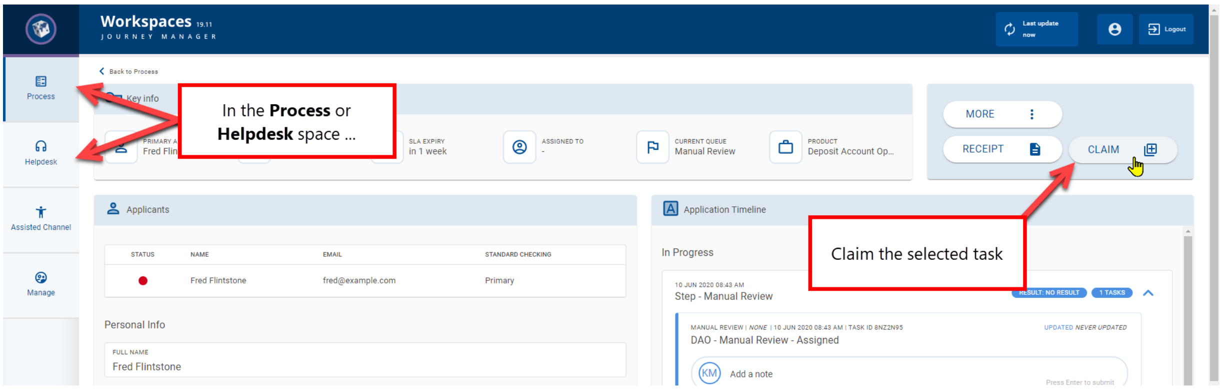
1. Select the Process or Helpdesk space.
2. On the List page, locate the task you want to claim in the item list, then select it to display the application details for the task.

3. On the Details page, click a button to claim the task:

- **Workspaces v20.05** – Click the (Claim) icon button for the selected task in the Timeline.



- **Workspaces v19.11 and earlier** – Click the Claim button in the Action panel.



The task is assigned to you, and your Workspaces id is displayed in the **Assigned To** field in the key information.

When you claim a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

Decision - Record a Decision for a Task

Workspaces | Workspaces User | 18.11 | 20.05

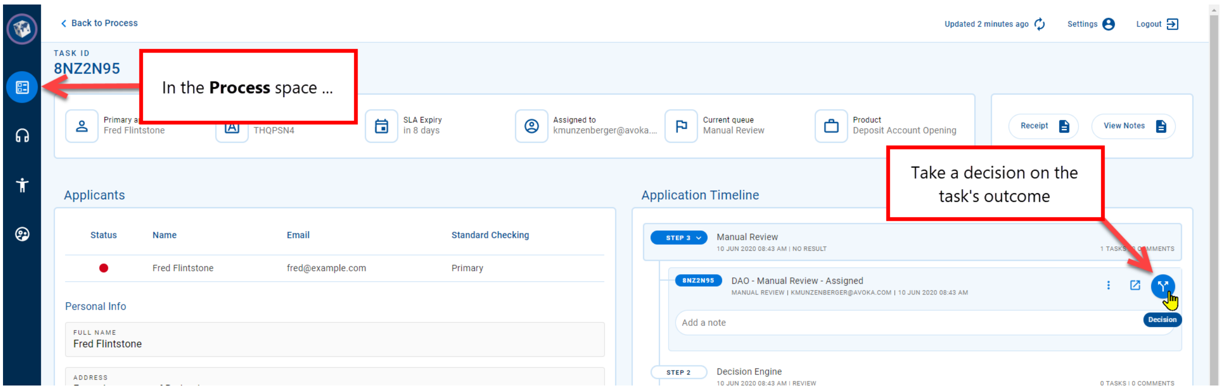
When you have all the information you need about a task, you can take a decision on the task's outcome. Taking a decision on a task completes the task and moves it along in its life cycle.

The Decision action is available only from the Details page in the Process space, and only for tasks that are assigned to you; you cannot take a decision for a task that is assigned to someone else. When you take a decision, you must provide both the decision (representing some outcome, assessment or result) and a note supporting the decision. The note is important because it helps others to understand how you arrived at your decision, and may be pre-filled with relevant information.

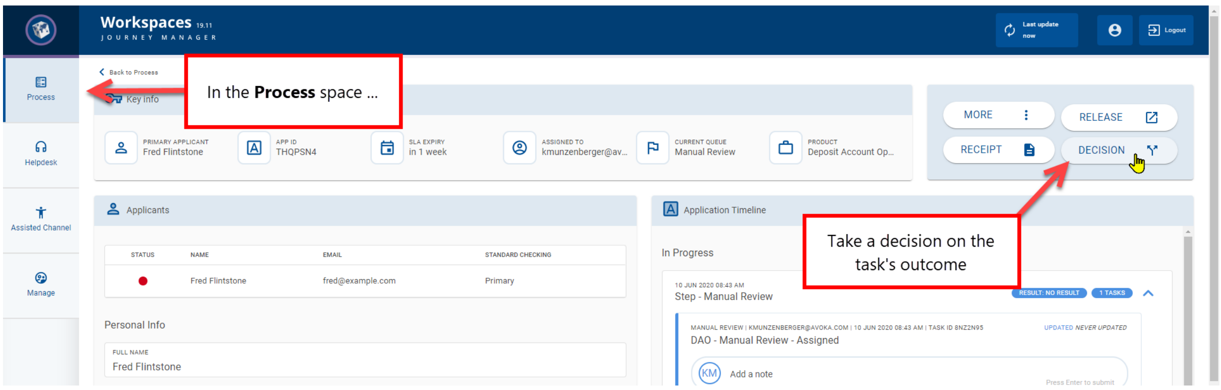
To take a decision on a task's outcome:

1. Select the Process space.
2. Locate the item (task) of interest, and select it to open its Details page.
3. Click a **Decision** button to display the Decision window.

- **Workspaces v20.05** – Click the (Decision) icon button for the selected task in the Timeline.

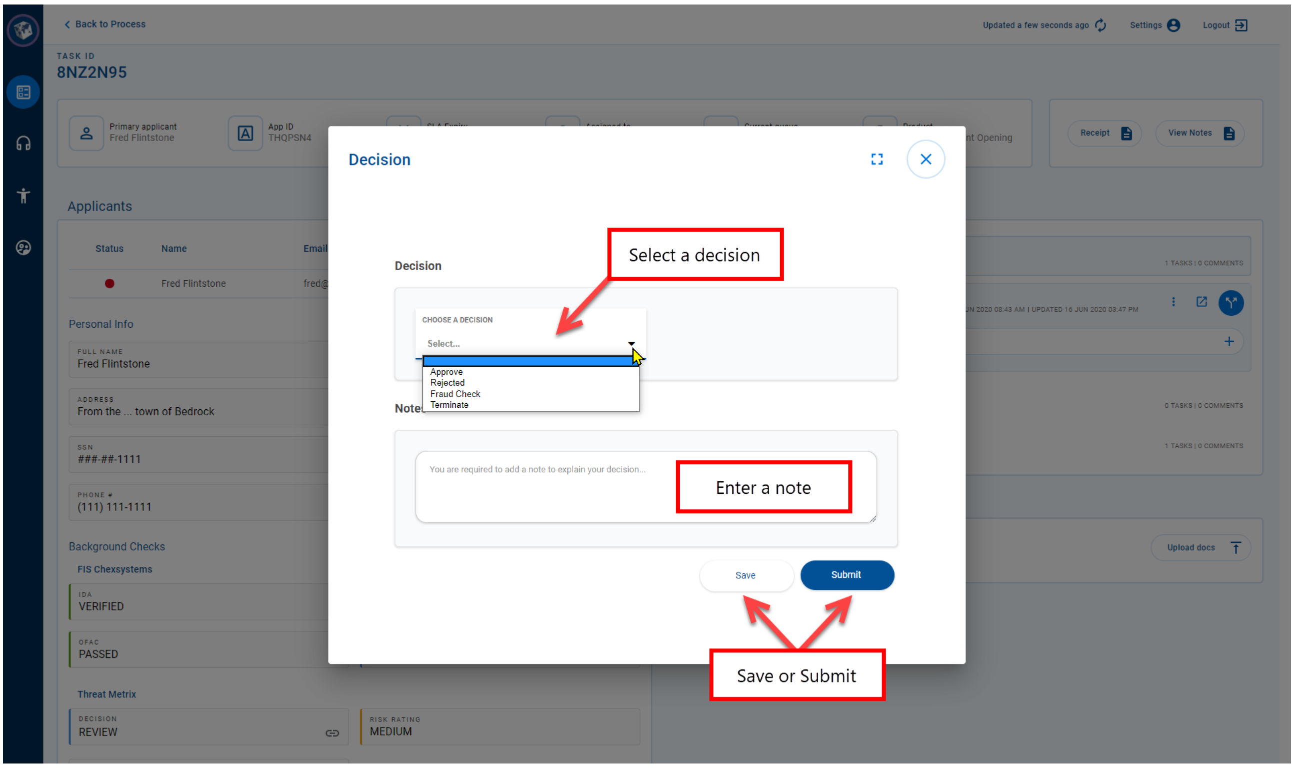


- **Workspaces v19.11 and earlier** – Click the Decision button in the Action panel.



4. Select one of the options in the **Choose a Decision** dropdown. The decision options available in your Workspaces portal are dependent on your Journey application configuration but may include such options as

Approve and Decline.



5. Enter a mandatory note supporting your decision. Ensure the note includes useful details that explain the decision you have taken. Relevant information may be prefilled in the note to assist you with this.
6. Finally, click **Submit** to submit your decision. If you're not ready to submit your decision but want to keep the information you have entered, click **Save** instead to save what you have entered so that it is not lost.
7. Click (Close) to close the Decision window and return to the Details page.

If you don't have all the information you need to complete the decision right now, you can click **Save** (at step 6) to save the information you have entered and complete the decision later. Subsequently, when you are ready to complete the decision, repeat the necessary steps above to return to the Decision window, update the Decision and Note as required, and then click **Submit** to record the decision you have made.

New Application - Start a New Application

Workspaces | Workspaces Applicant User | 21.11

A key feature of the Applicant space is the ability to create new applications. This feature is available via the New Application action which is fundamentally the same as the New Form action available in Workspaces.

> An application started using the New Form or New Application actions can only be accessed by an authenticated user; that is, a user who is logged in to Workspaces (including the Applicant space) or a Journey Platform system. However, many applicants are anonymous or unauthenticated users, starting an application from an external website such as an online banking website, and so will not be able to access an application started using New Form or New Application.
>
> Handover of applications between authenticated and anonymous users is possible but may not be offered in an out of the box Journey Platform solution. So, if application handover is important to you, contact your Journey Platform representative to discuss how your solution can be customized to allow application handover where you need it in your application workflow.

In the Applicant space, the New Application action is only available from the Search screen; it isn't available from the Details screen.

To start an application in the Applicant space:

1. Select the Applicant space.
2. On the Search screen, click **New Application** and select a form / product type from the list displayed.
3. A modal window opens containing the selected form. Enter any customer or application details that you have, then save or submit the application and close the modal window.
4. When you return to the Search screen, your new application will appear in the item list. If you can't see it straight away, you may need to refresh the screen.

Once you have started and saved an application, you can open it again any time to continue entering information until the application has been submitted. For details about how to continue an application, see Resume - Resume a Saved Application.

New Form - Start a New Application

Workspaces | Workspaces User | 18.11 | 19.11

In a customer-focused role such as a relationship manager, it helps to be able to provide services to your busy customers that make their lives easier. Workspaces includes many features aimed at reducing friction in the application process. One of these is the New Form action which allows you to kick-start applications on behalf of your customers.

> An application started using the New Form or New Application actions can only be accessed by an authenticated user; that is, a user who is logged in to Workspaces (including the Applicant space) or a Journey Platform system. However, many applicants are anonymous or unauthenticated users, starting an application from an external website such as an online banking website, and so will not be able to access an application started using New Form or New Application.
>
> Handover of applications between authenticated and anonymous users is possible but may not be offered in an out of the box Journey Platform solution. So, if application handover is important to you, contact your Journey Platform representative to discuss how your solution can be customized to allow application handover where you need it in your application workflow.

You can start an application only from the List page in the Assisted Channel space; the New Form action is not available from the Details page, nor in any other space.

To start an application:

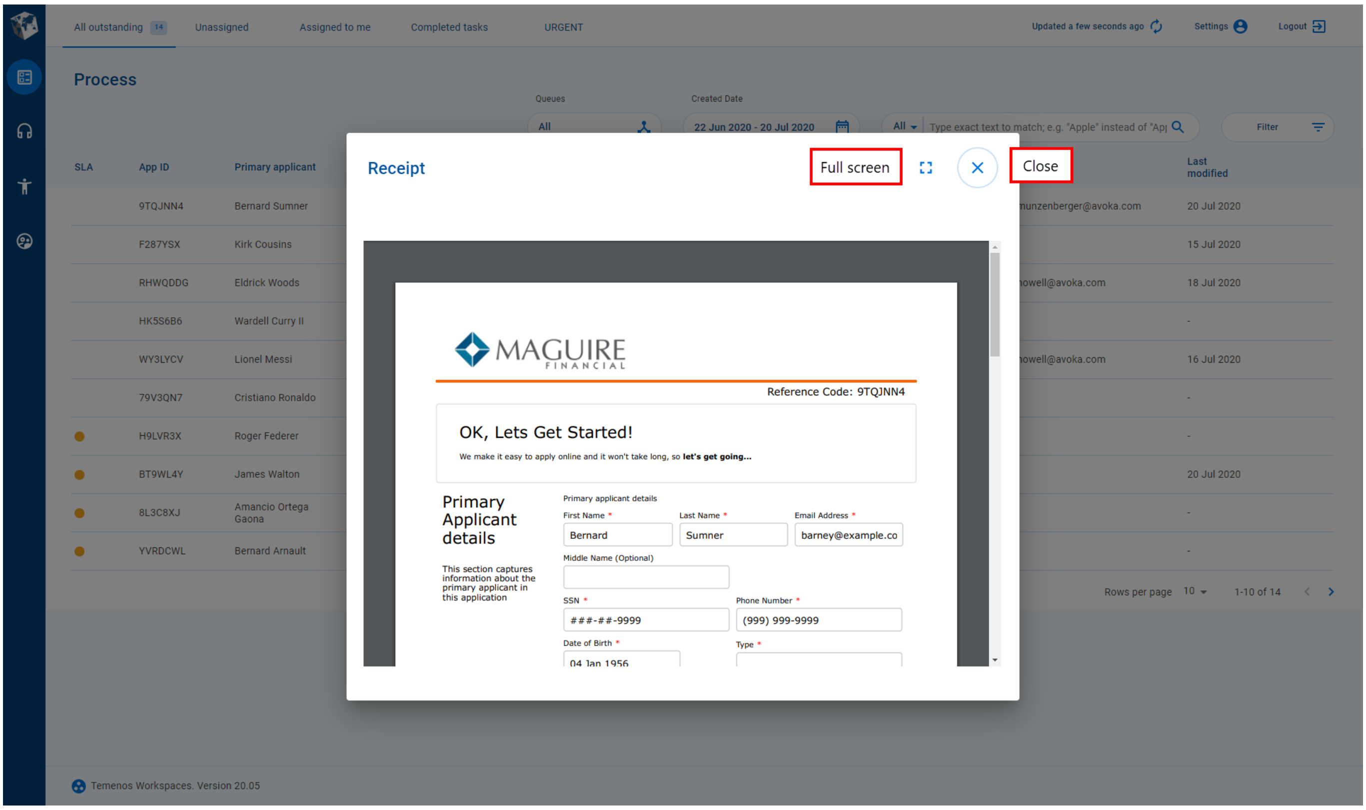
1. Select the Assisted Channel space.
2. On the List page, click New Form and select a form / product type from the list displayed.
3. A window opens containing the selected form. Enter any customer or application details that you have, then save and close the application.
4. When you return to the List page, a task for the new application that you just saved will appear in your item list. If you can't see it straight away, you may need to refresh the page.

Once you have started an application, you can open it again any time to continue entering information on the applicant's behalf until the application has been submitted. For details about how to continue an application, see View Form on this page.

Receipt - View a Receipt

Workspaces | Workspaces User | 18.11 | 19.11

Many of the actions you perform in Workspaces rely upon you being able to see the information submitted by an applicant; for example, when you're reviewing an application to make a decision or responding to a customer inquiry. The Receipt action allows you to view a submitted application. To view an application that has been saved but not yet submitted, see View Form on this page.



You can view a receipt from any space, and for any item (task or application) even if it's not assigned to you. A receipt is a read-only view of the information submitted by the applicant, displayed in the same form used to capture that information. Note that a receipt does not allow you to change the application in any way.

To view a receipt from a List page:

1. Select any space.
2. On the List page, locate the item that you want to view.
3. Point your cursor at the item in the item list – the available actions appear at the right-hand side. If the item relates to a submitted application, you will see the (Receipt) icon. If you do not see this icon, the application has not yet been submitted and you will see the (View Form) icon instead; see View Form for details about how to view a saved application.

4. Click (Receipt) – a window opens displaying the application information. Scroll bars are available to allow you to see the full page, and you can use any navigation tools on the form to see all of the application.

To view a receipt from a Details page:

1. Select any space.
2. On the List page, locate the item in the item list that you want to view, then select it to display its application details.
3. On the Details page, the Receipt action will be available if the application has been submitted; otherwise, the View Form action will be available indicating that the application has been saved but not yet submitted. For details about how to view a saved application, see View Form on this page.
4. Click **Receipt** – a window opens displaying the application information. Scroll bars are available to allow you to see the full page, and you can use any navigation tools on the form to see all of the application.

Regardless of which page you opened the receipt window from, when you're finished viewing the receipt, click (Close) in the top-right corner to close the Receipt window and return to the page you started from.

Recover – Recover an Abandoned Application

Workspaces | Workspaces User | 19.11 | 20.05

Prior to Workspaces v19.11, applications could only be recovered in the Journey Manager dashboard.

Sometimes, an application is started but not saved or submitted. This could be a deliberate choice by the applicant, but it may also be due to circumstances beyond the applicant's control; for example, if their browser crashes or the form session times out. Regardless of how or why it happens, an application that hasn't been saved or submitted eventually becomes abandoned.

After an application has become abandoned, the applicant may decide that they want to continue their application. For example, the applicant may have closed the form accidentally without saving/submitting it, or they may simply have change their mind and want to complete and submit the application they started earlier. The abandoned application probably contains a lot of information that the applicant entered earlier, and they don't want to have to enter it again. Workspaces allows you to recover an abandoned application, within a configured time frame, so that the applicant can continue the application they started without having to re-enter any saved information.

Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

In addition to abandoned applications, an application that has been withdrawn can also be recovered.

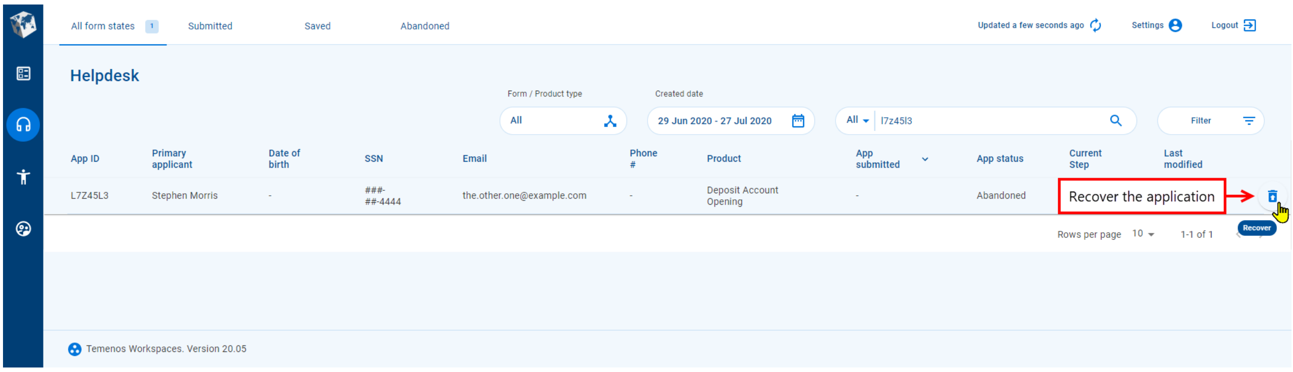
Workspaces does not mandate how an applicant can access a recovered application in the default configuration as this is an aspect that will be specific to each Workspaces portal. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their application - and this will include a link to take them back to their application.

You can recover an application from the List page or the Details page in the Helpdesk and Assisted Channel spaces.

To recover an application from the List page:

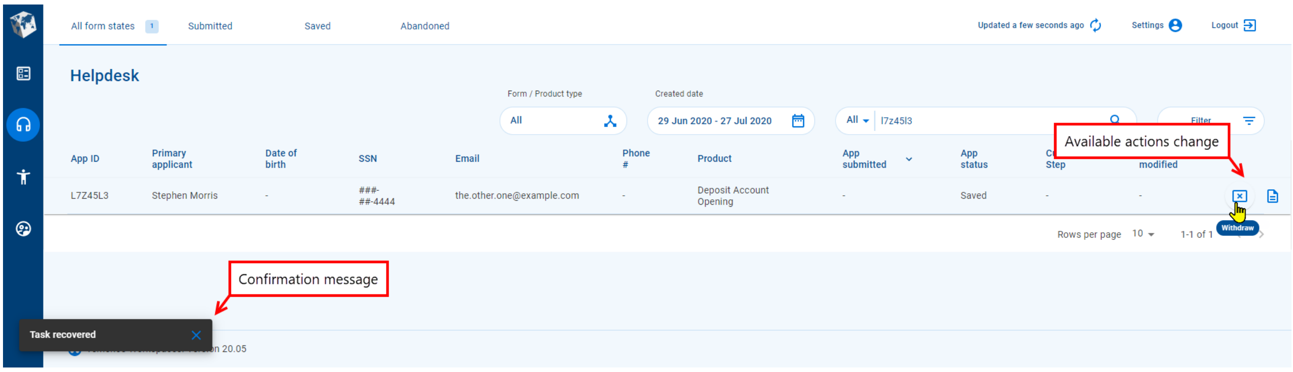
1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the application you want to recover. If you're searching for an application, keep in mind that some application details may not be available as the application may not be filled in completely.

3. Point your cursor at the item in the item list – the available actions appear at the right-hand side.



The (Recover) action is available here because even though the application has not been submitted yet, it has been saved (either intentionally by the applicant or in the background by the form) before becoming abandoned or being withdrawn.

4. Click (Recover) – the application is now available again to continue along the application workflow.



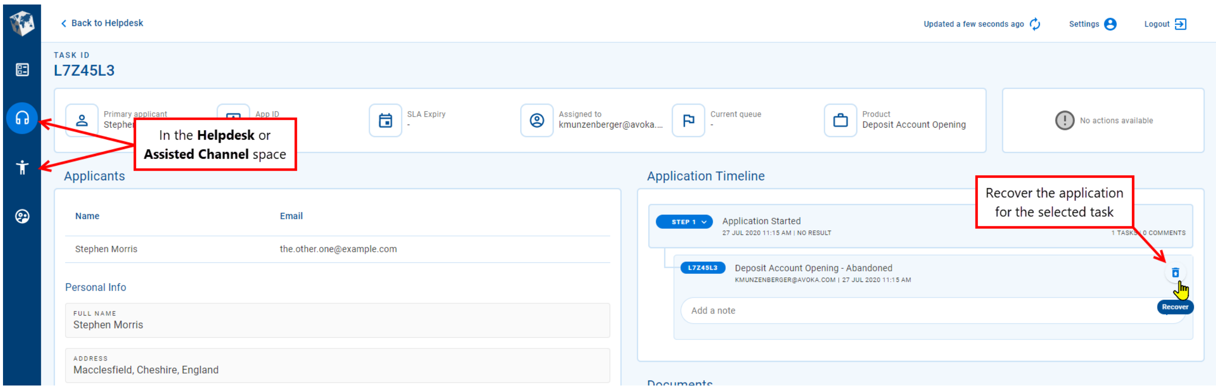
The available actions change and a message confirming you have recovered the application is displayed briefly in the bottom left corner.

To recover an application from the Details page:

1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the application you want to recover. If you're searching for an application, keep in mind that some application details may not be available as the application may not be filled in completely.
3. Select the application item in the item list to display its details.

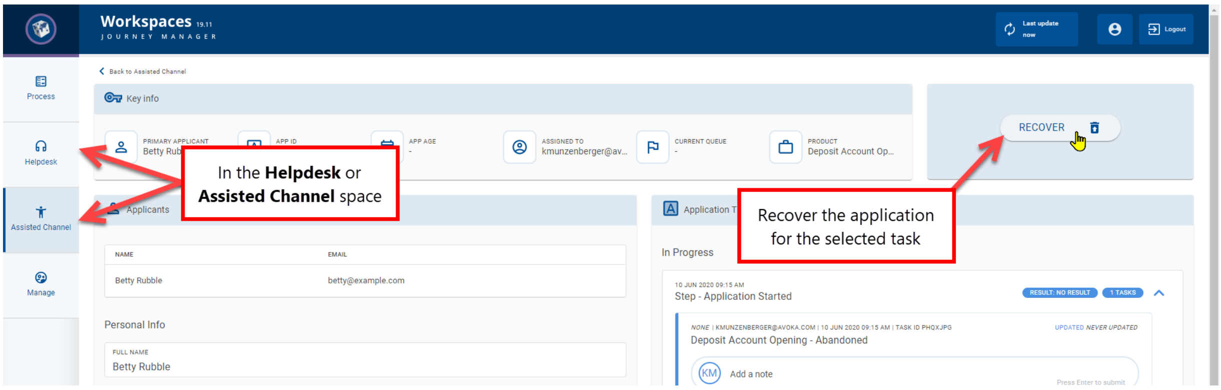
4. On the Details page, click a button to recover the application:

- **Workspaces v20.05** – Click the (Recover) icon button for the selected task in the Timeline.



Note that the Recover action is only available for the first task of an application that has been saved but not yet submitted.

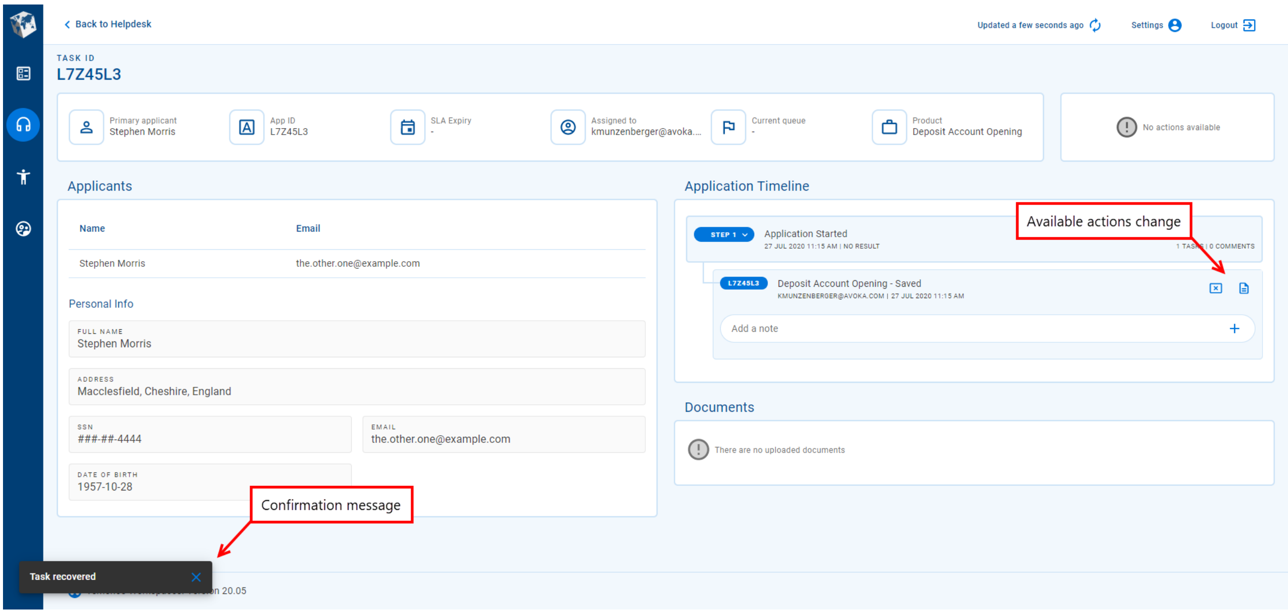
- **Workspaces v19.11 and earlier** – Click the Recover button in the Action panel.

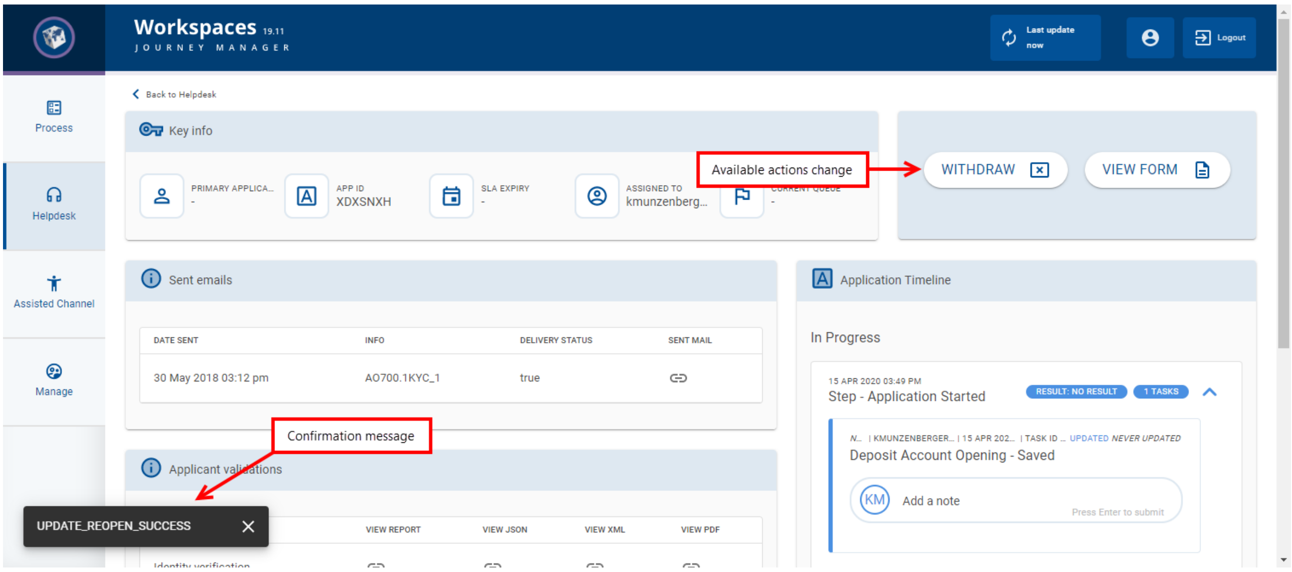


The application is now available again to continue along the application workflow.

5. The available actions change and a message confirming you have recovered the application is displayed briefly in the bottom left corner.

v20.05 v19.11 and earlier


Back to Helpdesk
Updated a few seconds ago
Settings
Logout
TASK ID
L7Z45L3
Primary applicant
Stephen Morris
App ID
L7Z45L3
SLA Expiry
Assigned to
kmunzenberger@avoka...
Current queue
Product
Deposit Account Opening
No actions available
Applicants
Name
Email
Stephen Morris
the.other.one@example.com
Personal Info
FULL NAME
Stephen Morris
ADDRESS
Macclesfield, Cheshire, England
SSN
###-##-4444
EMAIL
the.other.one@example.com
DATE OF BIRTH
1957-10-28
Application Timeline
Available actions change
STEP 1
Application Started
Deposit Account Opening - Saved
Add a note
Documents
There are no uploaded documents
Confirmation message
Task recovered


Workspaces 19.11
JOURNEY MANAGER
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Back to Helpdesk
Key info
PRIMARY APPLICA...
APP ID
XDXSNXH
SLA EXPIRY
ASSIGNED TO
kmunzenberg...
Available actions change
WITHDRAW
VIEW FORM
Sent emails
DATE SENT
INFO
DELIVERY STATUS
SENT MAIL
30 May 2018 03:12 pm
AO700.1KYC_1
true
Application Timeline
In Progress
15 APR 2020 03:49 PM
Step - Application Started
RESULT: NO RESULT
1 TASKS
Deposit Account Opening - Saved
Add a note
Press Enter to submit
Confirmation message
Applicant validations
UPDATE_REOPEN_SUCCESS
VIEW REPORT
VIEW JSON
VIEW XML
VIEW PDF

Release - Release a Task Assigned to You

Workspaces | Workspaces User | 18.11 | 19.11

When you no longer need to work on a task, you can release it so that it can be assigned to someone else. Releasing a task returns it to the pool of unassigned tasks in the item list, allowing it to be assigned to or claimed by someone else.

To release a task, you must be in the Process or Helpdesk space. The Release action is available only for tasks that are assigned to you. You cannot release a task that is assigned to someone else; the task must be unassigned first. To learn about unassigning tasks, see Unassign.

To release a task from the List page:

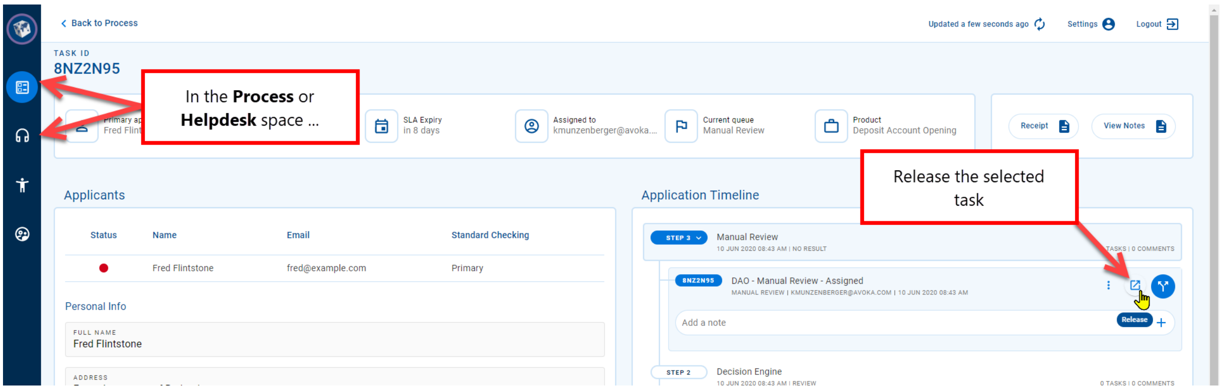
1. Select the Process or Helpdesk space.
2. On the List page, locate the task you want to release in the item list.
3. Point your cursor at the task item – the available actions appear at the right-hand side.
4. Click  (Release) – the task is no longer assigned to you, and your Workspaces id is removed from the **Assigned** column.

To release a task from the Details page:

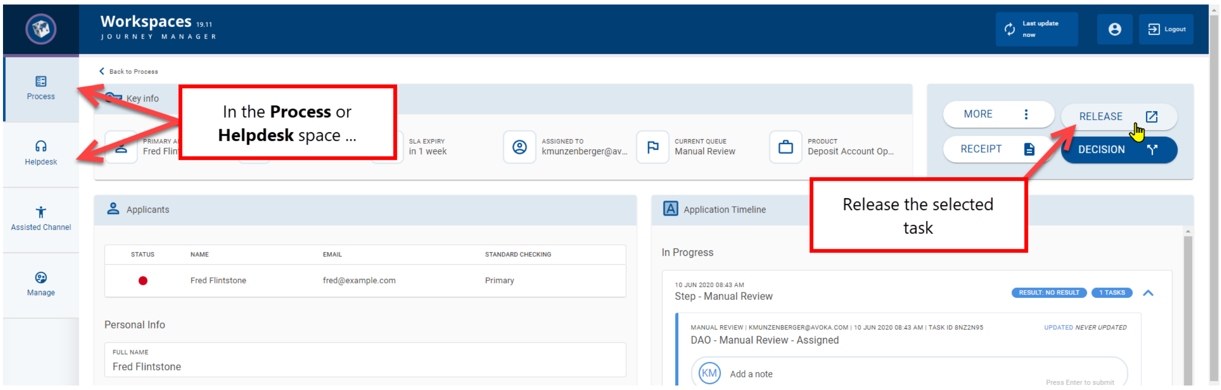
1. Select the Process or Helpdesk space.
2. On the List page, locate the task you want to release in the item list, then select it to display the task's details.

3. On the Details page, click a button to release the task:

- **Workspaces v20.05** – Click the (Release) icon button for the selected task in the Timeline.



- **Workspaces v19.11 and earlier** – Click the Release button in the Action panel.



The task is no longer assigned to you, and your Workspaces id is removed from the **Assigned To** field in the key information.

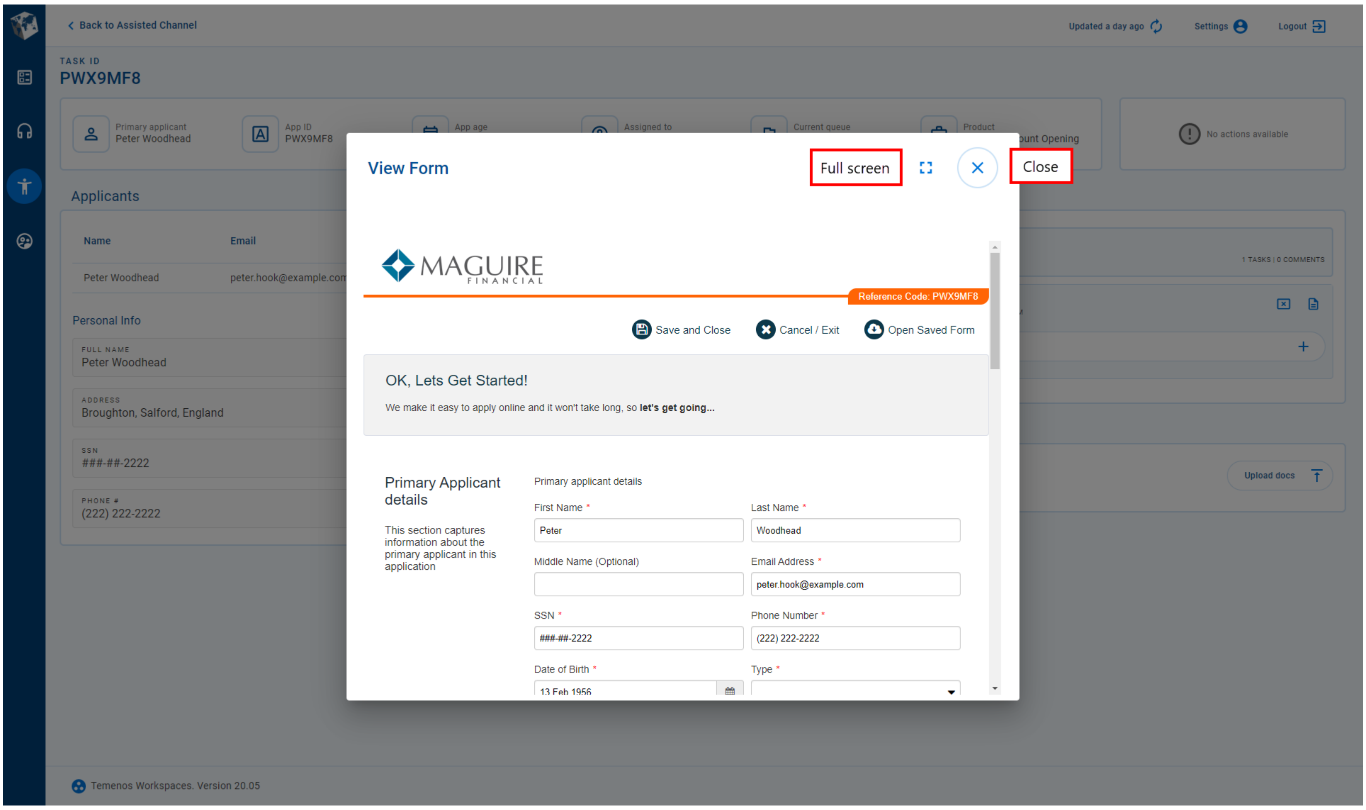
When you release a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

Resume - Resume a Saved Application

Workspaces | Workspaces Applicant User | 21.11

After you start an application, you may find that you don't have all the information you need at hand to complete the application, so you save it for now while you go and find what you need. Once you have all the information for your application, you can resume your saved application to complete it and submit it.

To view the information for an application that has been submitted, see Receipt – View a Receipt.



To resume an application, you must be in the Applicant space. When you resume an application, the information previously entered is displayed in the same form that was used to capture that information. While resuming an application and viewing a receipt both show you the application form, these two actions differ in one key way. When you view a receipt, the application form is displayed read-only. However, when you resume an application, you can enter or update information in the application form and then submit it.

Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

You can only resume a form from the Details screen. To resume a form:

1. Select the Applicant space.
2. On the Search screen, locate an item in the item list for the application that you want to resume, and select it to display its details.
3. On the Details screen, the Resume action will be available if the application has been saved but not yet submitted. However, if the application has been submitted, the Receipt action will be available instead. For details about how to view a submitted application, see Receipt - View a Receipt.
4. Click **Resume**. A modal window opens displaying the application in the same form used to capture the original information. Scroll bars are available to allow you to access the full page, and you can use any navigation tools on the form to access all of the application.

From this point you can continue to fill out the application. When you're done entering information, you can submit the application or save it again if you're not ready to submit it yet. When you're finished with the form, click ✕ (Close) in the top-right corner to close the form window and return to the Details screen.

Unassign - Remove a Task Assignment

Workspaces | Workspaces User | 18.11 | 20.05

If you manage a team, you may need to schedule work to meet various needs; for example, to share work across your team, to accommodate team member absences, or to satisfy an **SLA**[1]. A user with access to the Manage space, such as a manager or a Workspaces administrator, can change task assignments to address any such needs.

You can remove a task assignment using the Unassign action in the Manage space. Removing a task assignment returns the task to the pool of unassigned tasks, allowing it to be assigned to or claimed by someone else. You can only remove a task assignment if the task is assigned to someone already, including yourself. However, if the task is assigned to you and you're in the Process space, you can release it instead. To learn about releasing tasks, see Release a Task.

To remove a task assignment from the List page:

1. Select the Manage space.
2. On the List page, locate the task you want to unassign in the item list.
3. Point your cursor at the task item – the available actions appear at the right-hand side.
4. Click  (Unassign) – the task is no longer assigned, and the previously assigned Workspaces id is removed from the **Assigned** column.

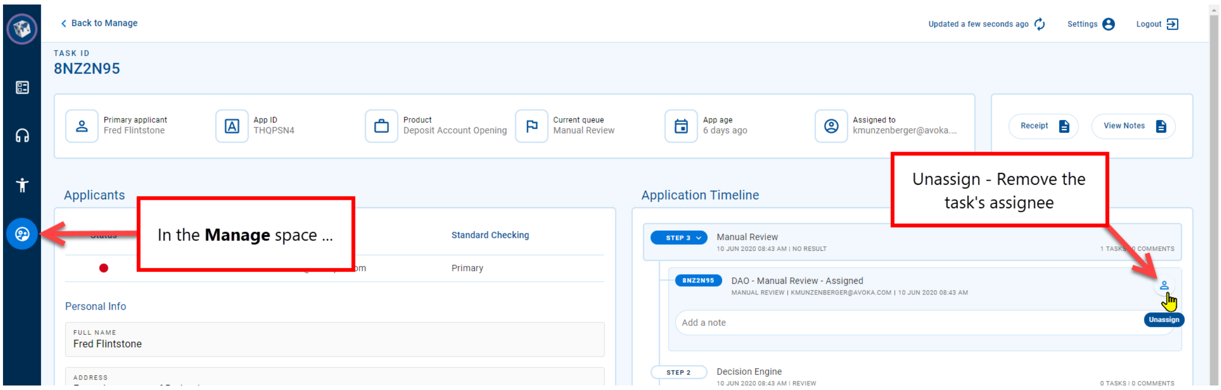
To remove a task assignment from the Details page:

1. Select the Manage space.
2. On the List page, locate the task you want to unassign in the item list, and select it to display the task's details.

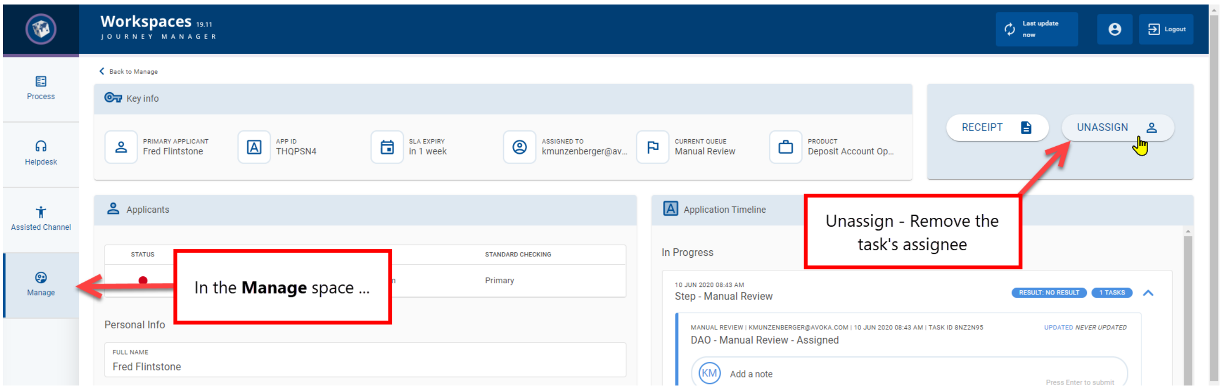
[1] A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

3. On the Details page, click a button to remove the task assignment:

- **Workspaces v20.05** – Click the 👤 (Unassign) icon button for the selected task in the Timeline.



- **Workspaces v19.11 and earlier** – Click the Unassign button in the Action panel.



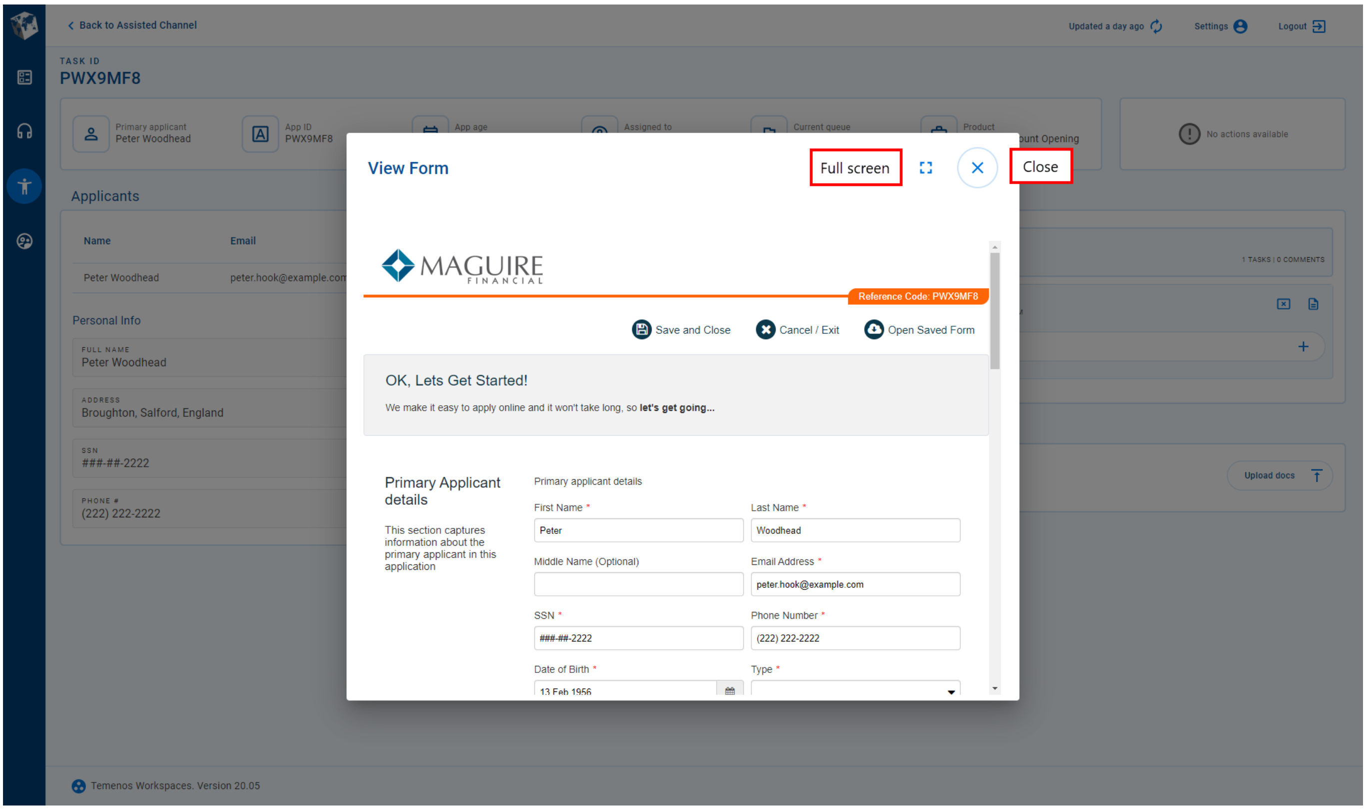
The task is no longer assigned, and the previously assigned Workspaces id is removed from the **Assigned To** field in the key information.

When you remove a task assignment from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

View Form - View a Saved Application

Workspaces | Workspaces User | 18.11 | 19.11

Some of the actions you perform in Workspaces rely upon you being able to see information entered and saved by an applicant; for example, when responding to a customer inquiry. The View Form action allows you to view a saved application. To view an application that has been submitted, see Receipt.



To view a form, you must be in the Helpdesk or Assisted Channel space. When you view a form, the information entered by the applicant is displayed in the same form used to capture that information. Viewing a form differs from viewing a receipt in that the form is not read-only. When you view a form, you can enter or update application information to help the applicant to complete their application.

To view a form from a List page:

1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the item that you want to view in the item list.
3. Point your cursor at the item – the available actions appear at the right-hand side. If you see the (Receipt) icon, the item relates to a submitted application – see Receipt for details about how to view a submitted application. Otherwise, you will see the (View Form) icon indicating the application has been saved but not yet submitted.

4. Click (View Form) – a window opens displaying the application in the same form used to capture the original information. Scroll bars are available to allow you to access the full page, and you can use any navigation tools on the form to access all of the application.

To view a form from a Details page:

1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the item that you want to view in the item list, then select it to display the application details.
3. On the Details page, the View Form action will be available if the application has been saved but not yet submitted. However, if the application has been submitted, the Receipt action will be available instead. For details about how to view a submitted application, see Receipt.
4. Click **View Form** – a window opens displaying the application in the same form used to capture the original information. Scroll bars are available to allow you to access the full page, and you can use any navigation tools on the form to access all of the application.

Regardless of which page you opened the form window from, when you're finished accessing the form, click (Close) in the top-right corner to close the form window and return to the page you started from.

View Notes - View all Notes for an Application

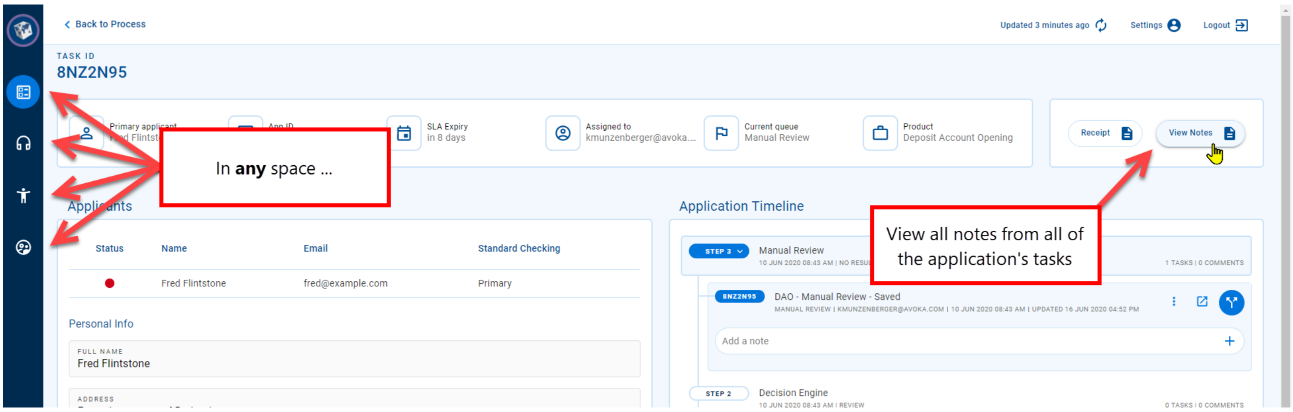
Workspaces | Workspaces User | 20.05

As an application progresses through its life cycle, it may pass from one user to another to perform various assessments or other activities. Each user that touches the application can add information to the application such as how it is processed, details of user inquiries, or changes in prioritization. Because an application can pass through many different sets of hands, it's important to capture this information in case it's needed by someone else later in the application life cycle, or to assist in responding to inquiries. This information when captured is stored as notes against each appropriate task.

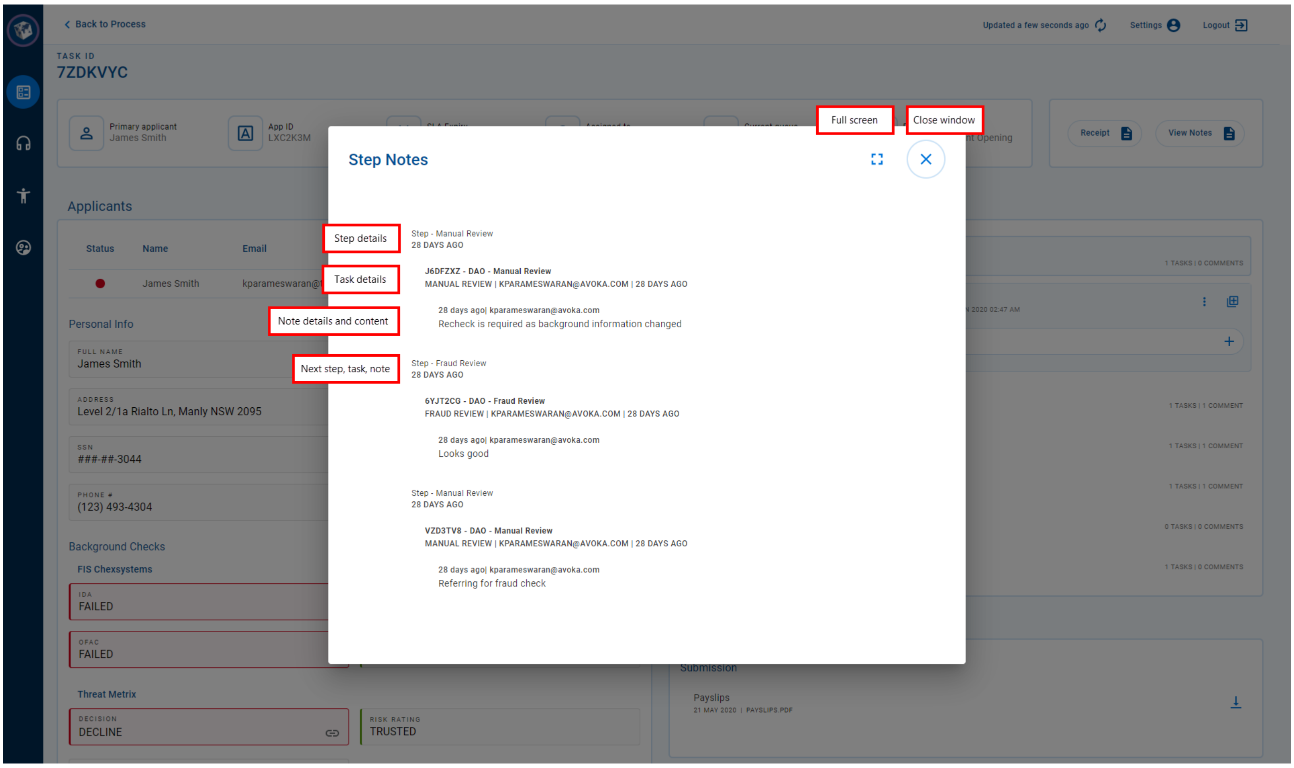
You can view notes for a specific task in the Timeline on the Details page. This is convenient if you know which task a note was made against. But maybe you don't know which task to look at, or you want to see an overview of all notes for the application. In this instance, you can use the View Notes action which is available from the Details page in all spaces.

To view all notes for an application:

1. Select a space.
2. Locate the item of interest in the item list, and select it to open its Details page.
3. Click **View Notes** in the Action panel to display the **Notes** window.



4. Notes are grouped by step and task, placing each note in the context of the application's and task's state at the time that it was made.



A scroll bar appears if necessary for you to view all of the notes, and you can expand the window to use the full screen.

5. When you're finished viewing the notes, click (Close) to close the **Notes** window and return to the Details page.

To learn about creating notes, see Application Details Page > Timeline.

Withdraw – Withdraw an Unsubmitted Application

Workspaces | Workspaces User | 19.11 | 20.05

If you're using Workspaces v19.11 or later, you can withdraw an application from within Workspaces or the Journey Manager dashboard. However, if you're using Workspaces v19.05 or earlier, applications can only be withdrawn in the Journey Manager dashboard.

Consider the situation where someone starts an application but, before submitting it, they change their mind and decide not to proceed with the application after all. So, they contact the support helpdesk and ask for the application to be canceled. Workspaces handles this situation by allowing an application to be withdrawn.

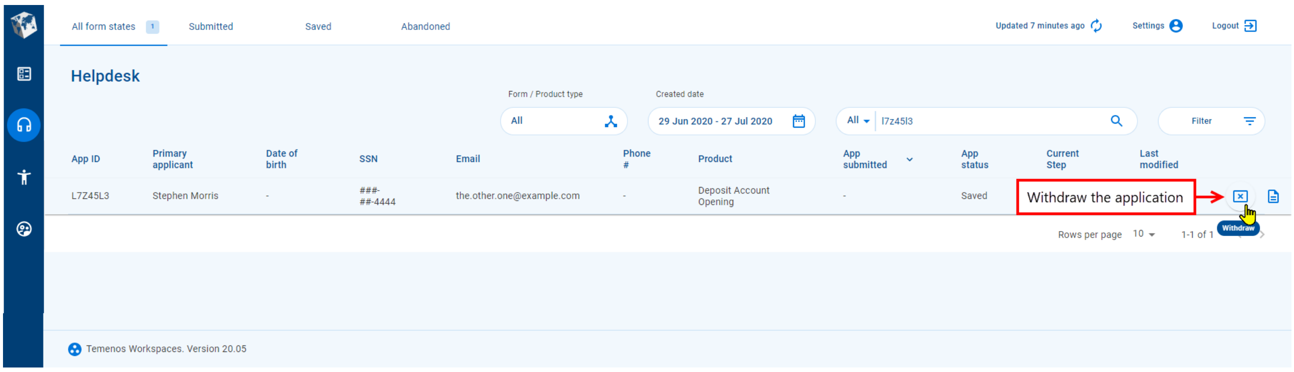
Withdrawing an application is a deliberate step in the application workflow and progresses the application to an end point in its life cycle. At this point, processing of the application might cease but this does not mean that the application is discarded just yet. This is convenient for an applicant that has a subsequent change of heart and decides to continue with their application, as all is not lost and a withdrawn application can be recovered.

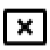
While it might be good practice to withdraw unwanted unsubmitted applications, it is not mandatory to do so, and an unsubmitted application that is not withdrawn will eventually expire, becoming . This is important to note as it could affect an SLA relating to the processing of applications.

You can withdraw an application from the List page or the Details page in the Helpdesk and Assisted Channel spaces.

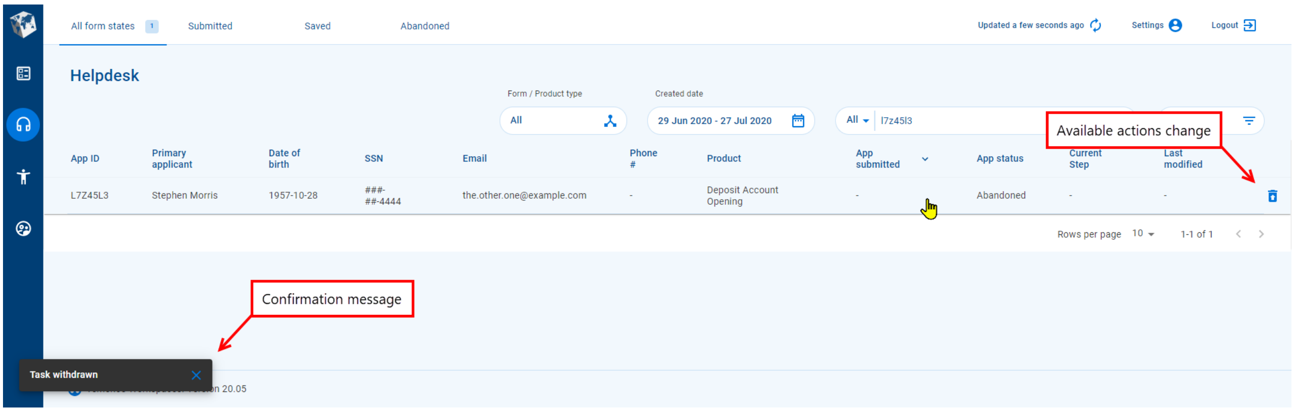
To withdraw an application from the List page:

1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the application you want to withdraw. If you're searching for an application, keep in mind that some application details may not be available as the application may not be filled in completely.
3. Point your cursor at the application item in the item list – the available actions appear at the right-hand side.



The  (Withdraw) action is available here because even though the application has not been submitted yet, it has been saved (either intentionally by the applicant or in the background by the form).

4. Click (Withdraw) – the application is withdrawn, and the available actions change.



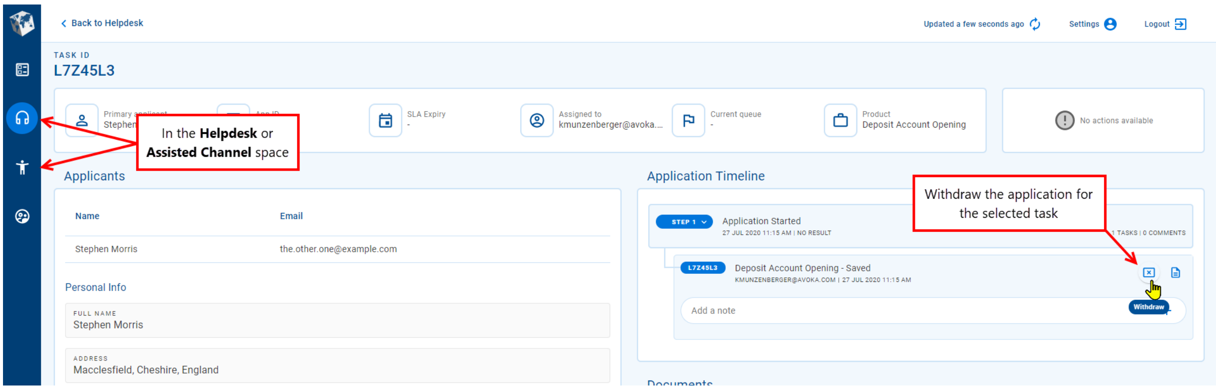
A message confirming you have withdrawn the application is displayed briefly in the bottom left corner.

To withdraw an application from the Details page:

1. Select the Helpdesk or Assisted Channel space.
2. On the List page, locate the application you want to withdraw. If you're searching for an application, keep in mind that some application details may not be available as the application may not be filled in completely.
3. Select the application item in the item list to display its details.

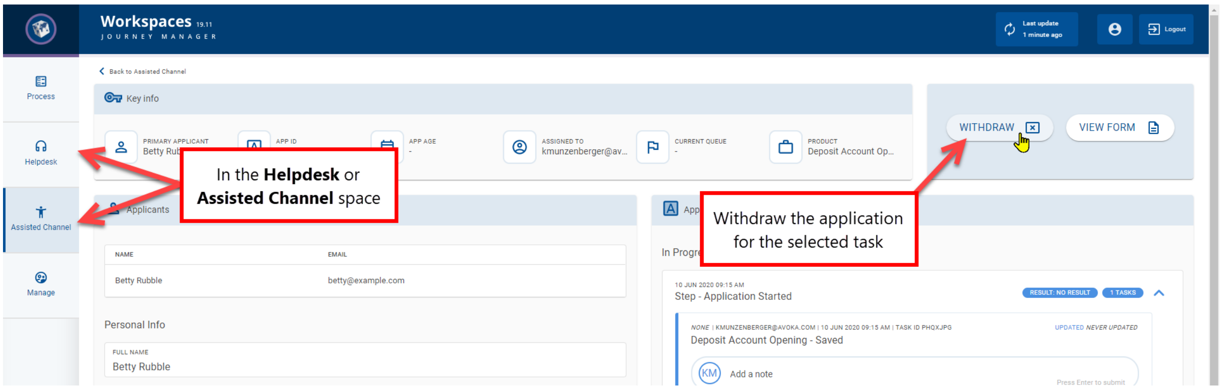
4. On the Details page, click a button to withdraw the application:

- **Workspaces v20.05** – Click the (Withdraw) icon button for the selected task in the Timeline.



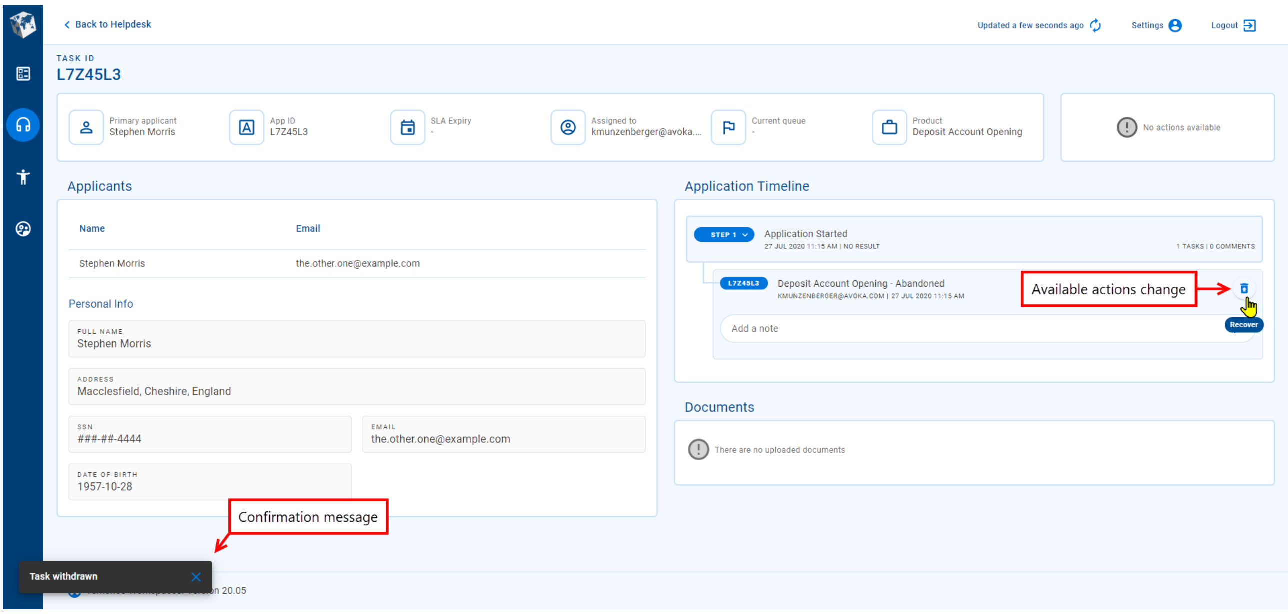
Note that the Withdraw action is only available for the first task of an application that has been saved but not yet submitted.

- **Workspaces v19.11 and earlier** – Click the Withdraw button in the Action panel.

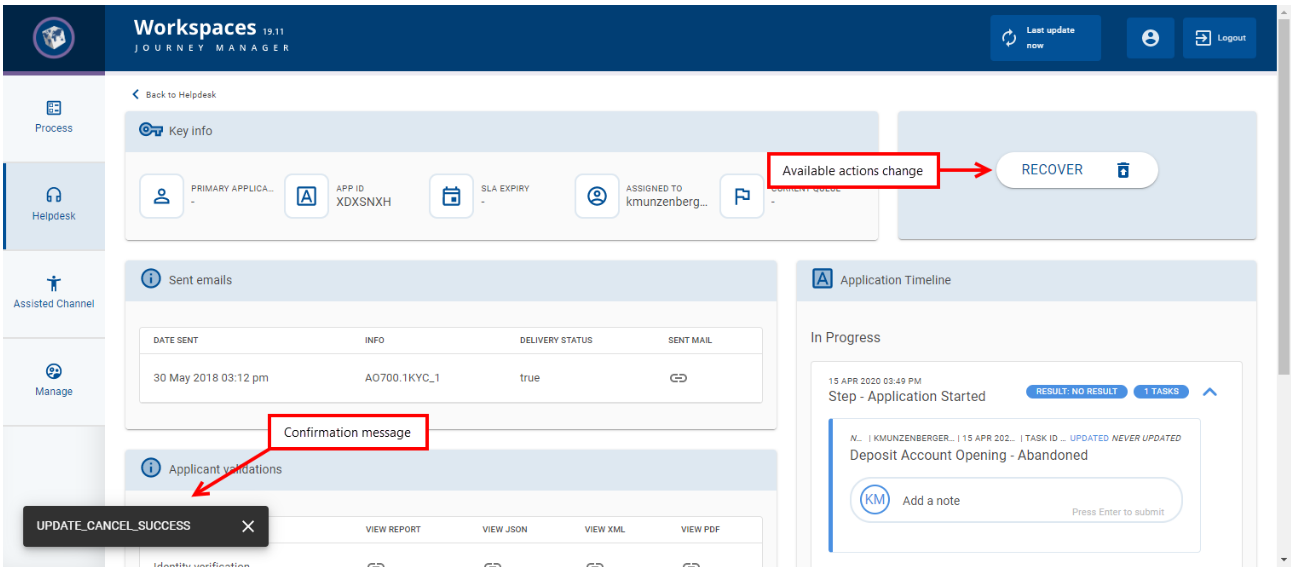


5. The application is withdrawn, and the available actions change. A message confirming you have withdrawn the application is displayed briefly in the bottom left corner.

v20.05 v19.11 and earlier



Back to Helpdesk
Updated a few seconds ago
Settings
Logout
TASK ID
L7Z45L3
Primary applicant
Stephen Morris
App ID
L7Z45L3
SLA Expiry
Assigned to
kmunzenberger@avoka...
Current queue
Product
Deposit Account Opening
No actions available
Applicants
Name
Email
Stephen Morris
the.other.one@example.com
Personal Info
FULL NAME
Stephen Morris
ADDRESS
Macclesfield, Cheshire, England
SSN
###-##-4444
EMAIL
the.other.one@example.com
DATE OF BIRTH
1957-10-28
Application Timeline
STEP 1
Application Started
Deposit Account Opening - Abandoned
Available actions change
Recover
Add a note
Documents
There are no uploaded documents
Confirmation message
Task withdrawn



Workspaces 19.11
JOURNEY MANAGER
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Back to Helpdesk
Key info
PRIMARY APPLICA...
APP ID
XDXSNXH
SLA EXPIRY
ASSIGNED TO
kmunzenberg...
Available actions change
RECOVER
Sent emails
DATE SENT
INFO
DELIVERY STATUS
SENT MAIL
30 May 2018 03:12 pm
AO700.1KYC_1
true
Application Timeline
In Progress
Step - Application Started
RESULT: NO RESULT
1 TASKS
Deposit Account Opening - Abandoned
Add a note
Press Enter to submit
Confirmation message
Applicant validations
VIEW REPORT
VIEW JSON
VIEW XML
VIEW PDF
UPDATE_CANCEL_SUCCESS

Reviewing Applications

Workspaces | Workspaces User | 18.11 | 20.05

Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

Applications submitted by new and existing customers are not always able to be approved or declined immediately. These pending applications are referred to staff for their attention in determining whether or not an application is successful. Staff can use Workspaces to review and resolve pending applications efficiently, minimizing any delays and contributing to higher customer satisfaction.

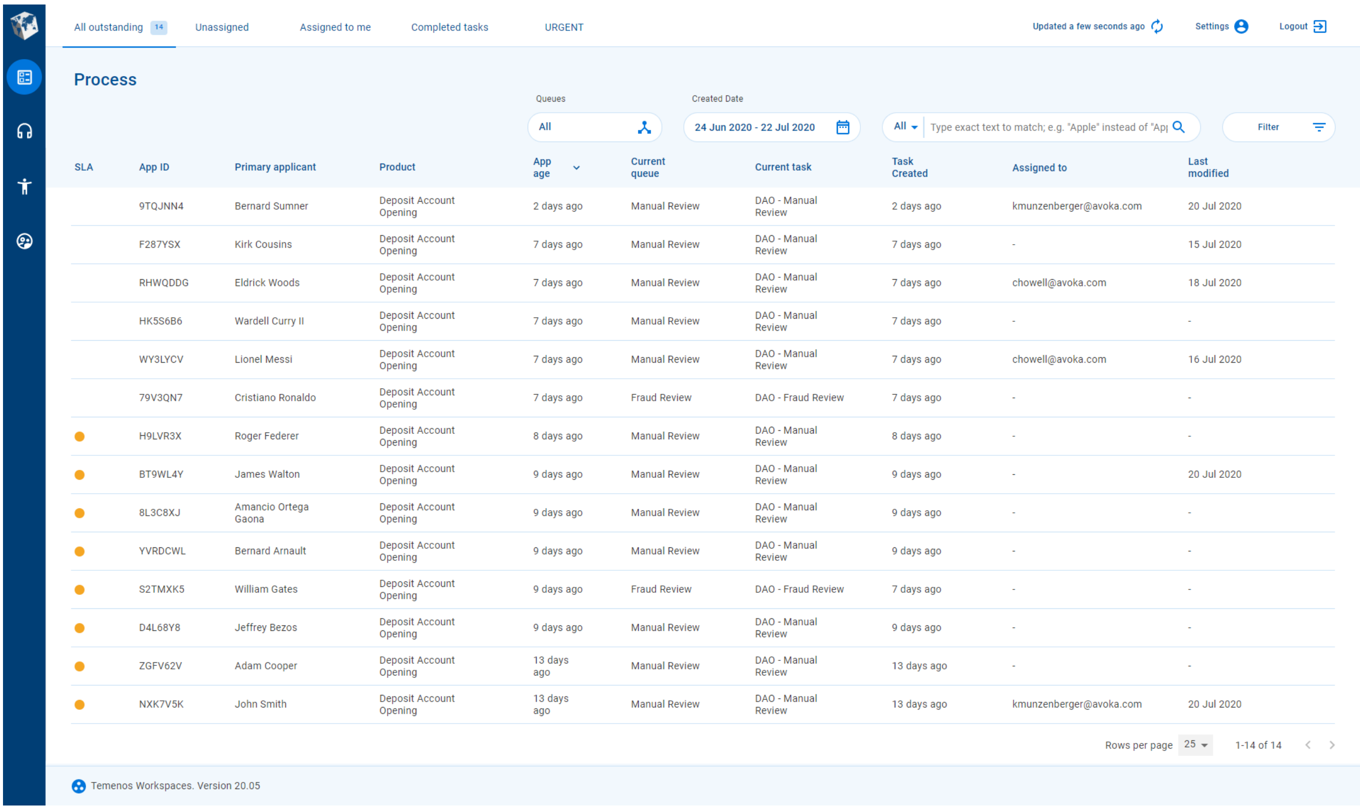
The default Workspaces configuration includes a Process space for reviewing applications, complete with a List page and a Details page. These pages are configured with features that help to make processing applications fast and efficient.

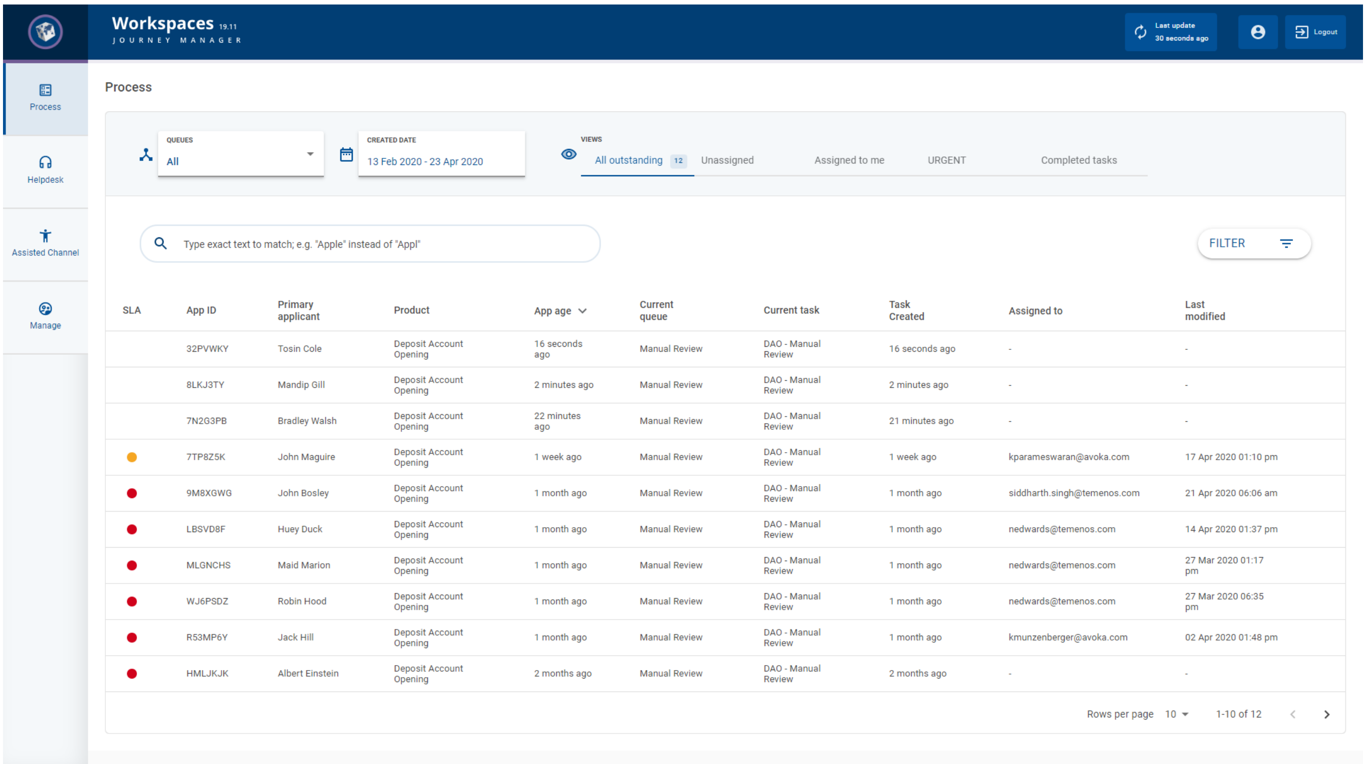
List Page

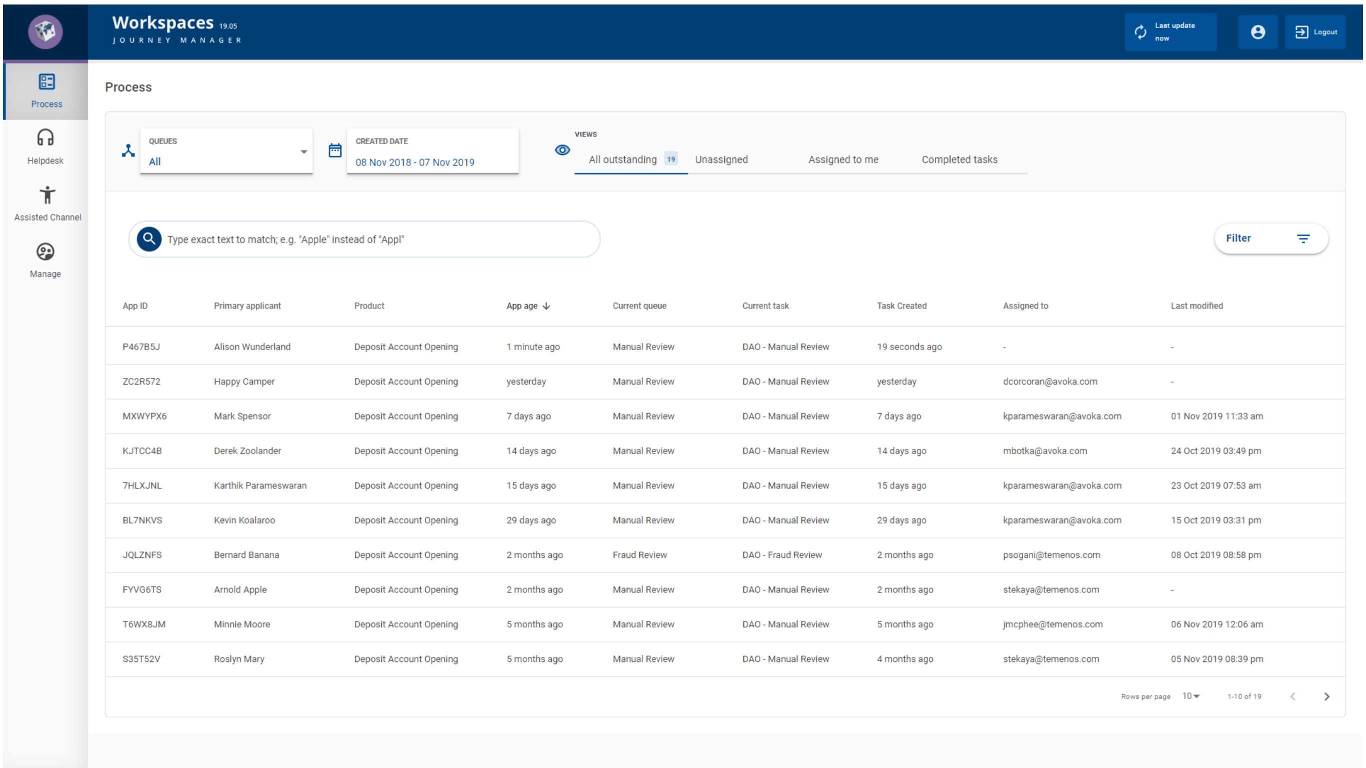
The List page in the Process space includes all of the standard features of a Workspaces List page.

- An item list populated with tasks sourced from the active queue.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11
- A global filter to select the queue that tasks are sourced from.
- A second global filter, Created Date, that restricts the tasks in the item list based on the date they were created.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.
- Paging tools that you can use to browse the item list.

v20.05 v19.11 v19.05 and earlier


All outstanding 14
Unassigned
Assigned to me
Completed tasks
URGENT
Updated a few seconds ago
Settings
Logout
Process
Queues
All
Created Date
24 Jun 2020 - 22 Jul 2020
All
Type exact text to match; e.g. "Apple" instead of "App
Filter
SLA App ID Primary applicant Product App age Current queue Current task Task Created Assigned to Last modified
9TQJNN4 Bernard Sumner Deposit Account Opening 2 days ago Manual Review DAO - Manual Review 2 days ago kmunzenberger@avoka.com 20 Jul 2020
F287YSX Kirk Cousins Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago - 15 Jul 2020
RHWQDDG Eldrick Woods Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago chowell@avoka.com 18 Jul 2020
HK5S6B6 Wardell Curry II Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago - -
WY3LYCV Lionel Messi Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago chowell@avoka.com 16 Jul 2020
79V3QN7 Cristiano Ronaldo Deposit Account Opening 7 days ago Fraud Review DAO - Fraud Review 7 days ago - -
H9LVR3X Roger Federer Deposit Account Opening 8 days ago Manual Review DAO - Manual Review 8 days ago - -
BT9WL4Y James Walton Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - 20 Jul 2020
8L3C8XJ Amancio Ortega Gaona Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - -
YVRDCWL Bernard Arnault Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - -
S2TMXK5 William Gates Deposit Account Opening 9 days ago Fraud Review DAO - Fraud Review 7 days ago - -
D4L68Y8 Jeffrey Bezos Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - -
ZGFV62V Adam Cooper Deposit Account Opening 13 days ago Manual Review DAO - Manual Review 13 days ago - -
NXK7V5K John Smith Deposit Account Opening 13 days ago Manual Review DAO - Manual Review 13 days ago kmunzenberger@avoka.com 20 Jul 2020
Rows per page 25
1-14 of 14
Temenos Workspaces. Version 20.05


Workspaces 19.11
JOURNEY MANAGER
Last update 30 seconds ago
Logout
Process
Helpdesk
Assisted Channel
Manage
Process
QUEUES
All
CREATED DATE
13 Feb 2020 - 23 Apr 2020
VIEWS
All outstanding 12
Unassigned
Assigned to me
URGENT
Completed tasks
Type exact text to match; e.g. "Apple" instead of "Appl"
FILTER
SLA App ID Primary applicant Product App age Current queue Current task Task Created Assigned to Last modified
32PVWKY Tosin Cole Deposit Account Opening 16 seconds ago Manual Review DAO - Manual Review 16 seconds ago - -
8LKJ3TY Mandip Gill Deposit Account Opening 2 minutes ago Manual Review DAO - Manual Review 2 minutes ago - -
7N2G3PB Bradley Walsh Deposit Account Opening 22 minutes ago Manual Review DAO - Manual Review 21 minutes ago - -
7TP8Z5K John Maguire Deposit Account Opening 1 week ago Manual Review DAO - Manual Review 1 week ago kparameswaran@avoka.com 17 Apr 2020 01:10 pm
9M8XGWG John Bosley Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago siddharth.singh@temenos.com 21 Apr 2020 06:06 am
LBSVD8F Huey Duck Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago nedwards@temenos.com 14 Apr 2020 01:37 pm
MLGNCHS Maid Marion Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago nedwards@temenos.com 27 Mar 2020 01:17 pm
WJ6PSDZ Robin Hood Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago nedwards@temenos.com 27 Mar 2020 06:35 pm
R53MP6Y Jack Hill Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago kmunzenberger@avoka.com 02 Apr 2020 01:48 pm
HMLJKJK Albert Einstein Deposit Account Opening 2 months ago Manual Review DAO - Manual Review 2 months ago - -
Rows per page 10
1-10 of 12



The Process space's List page displays a list of tasks from the selected queue, taking into consideration the current view and any active search, filter and sort options. Each row in the item list corresponds to a single task, showing a set of pre-configured data items in columns including an SLA indicator that identifies how application processing is progressing against the SLA conditions. The name of the active queue is displayed in the **Queue** selector, and the name of the current view is highlighted in the **View** selector. The list of tasks displayed can be further refined using the filter and sort options. Filtering restricts which tasks are displayed in the list, and sorting determines the order that tasks appear in the list. To learn more about these options, see Filter the Item List and Sort the Item List.

Once you've found the task you're interested in, you can select it in the item list to perform an action on it. To learn about the available actions, see Process Actions below.

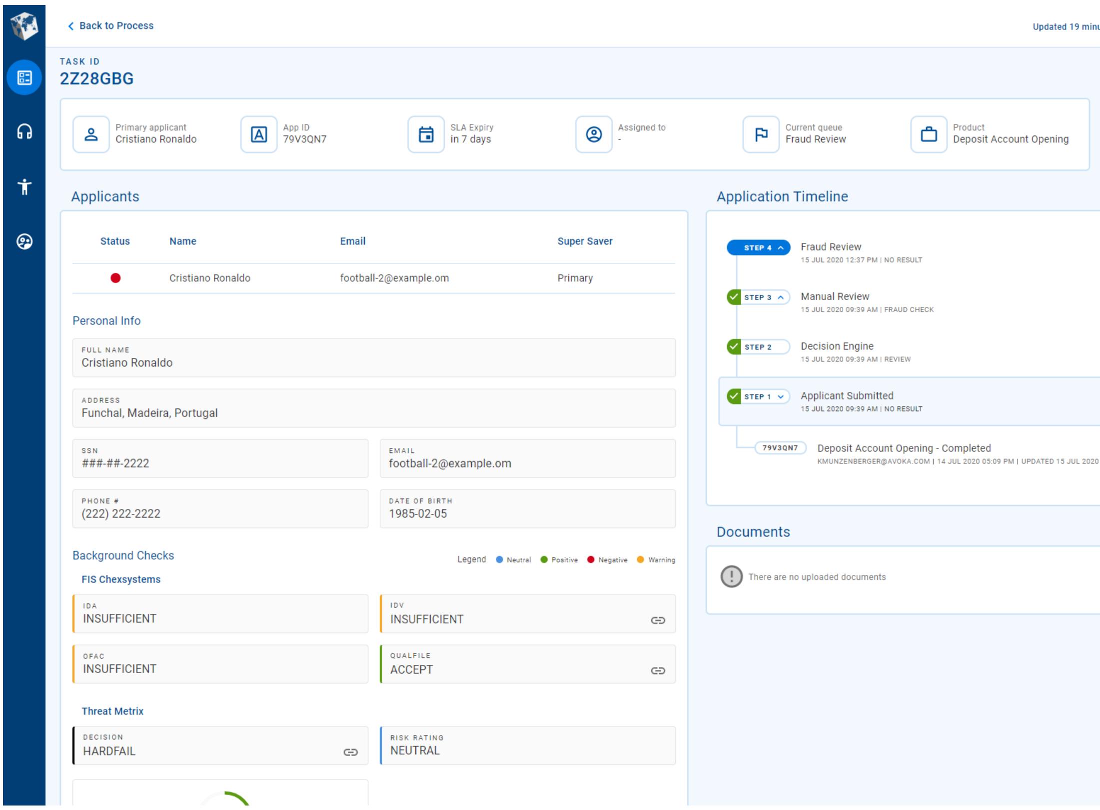
Details Page

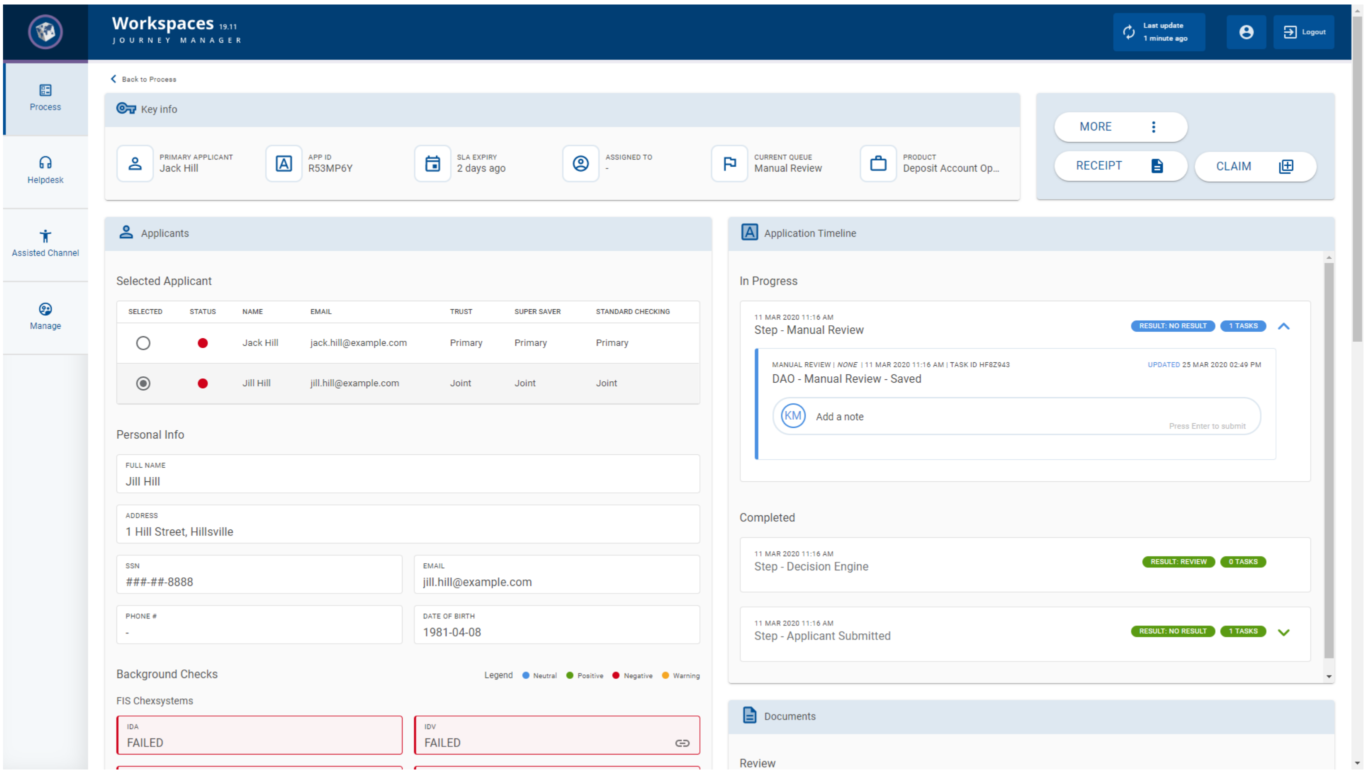
The Details screen in the Process space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected application and its tasks, and provides access to actions for processing applications. This includes the following features, each of which is contained in a separate card or card section:

- Key information about the selected application and its tasks that you may need when processing applications.
- The ability to track application progress against an SLA. | 19.11
- A set of standard actions that you can perform in the Process space at the current stage of the application's life cycle. | 20.05
- A list of applicants and products from which you can select an applicant to view more details. | 19.11
- Personal information for the selected applicant, including identity and contact details. | 19.11
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability. | 19.11
- A feature-rich application timeline of all the steps that the application has progressed through, showing key application details as well as tasks with accompanying notes. | 20.05
- Timeline task items that show the application's progress; select one to reload the Details screen and present the application in the context of the selected task. | 20.05
- A dynamic set of actions that are applicable to the selected timeline task and currently available for you to perform, thereby giving you confidence that you're acting on the right task. | 20.05
- Attached relating to the processing of the application. | 19.11
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

To learn about these standard features, click the links above or see The Application Details Screen.

v20.05 v19.11 and earlier





Process Actions

The process actions are:

- Claim – Assign a task to yourself.
- Decision – Take a decision about a task's outcome.
- Release – Remove a task assignment for a task assigned to you.
- View Notes – View all of the notes from all of an application's tasks.

The Claim, Release, and Decision actions are described below in the context of the Process space, including examples of how to use them.

Claim and ReleaseTasks

When you want to work on a task, you can select it in the item list and claim it so that everyone will know you are working on it. Once you have claimed a task, other actions may become available for you to perform on that task; in particular, taking a decision about whether or not an application is successful. When you no longer need to work on the task, you can release it so that it can be assigned to someone else.

You can claim a task that is not already assigned to anyone, thereby assigning it to you, but you can't claim a task that has already been assigned to someone else. Also, you can't use the Claim action to assign a task to someone else, only to yourself. To assign a task to someone else, you need to have access to the Assign action, normally only available to managers and supervisors.

You can release a task that is assigned to you, but you can't release a task that is assigned to someone else. Releasing a task returns it to the pool of unassigned tasks in the item list, allowing it to be assigned to someone else.

Take a Decision

When you have all the information you need about a task, you can take a decision on the task's outcome. Taking a decision on a task completes the task and moves it along in its life cycle.

The Decision action is available only from the Details page in the Process space, and only for tasks that are assigned to you; you cannot take a decision for a task that is assigned to someone else. When you take a decision, you must provide both the decision (representing some outcome, assessment or result) and a note supporting the decision. The note is important because it helps others to understand how you arrived at your decision, and may be pre-filled with relevant information.

If you don't have all the information you need to complete the decision right now, you can click **Save** (at step 6) to save the information you have entered and complete the decision later. Subsequently, when you are ready to complete the decision, repeat the necessary steps above to return to the Decision window, update the Decision and Note as required, and then click **Submit** to record the decision you have made.

For more information about the Decision action, see Workspaces Actions.

Process Action Examples

Let's go step by step through some examples for activities that you may need to perform while processing applications.

You can find examples below for the following actions:

- Claim a task on the List page
- Release a task on the List page
- Approve an application (Take a Decision) on the Details page

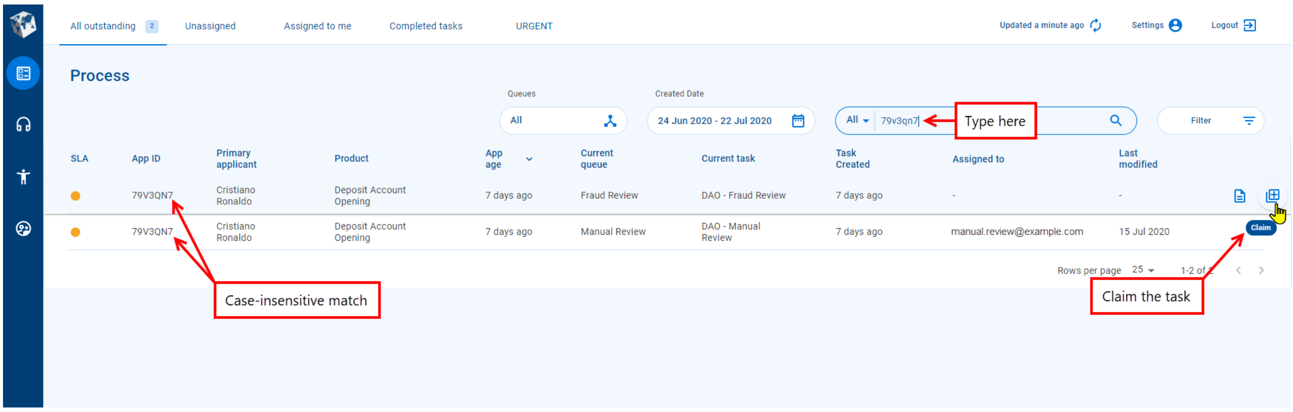
Step-by-step examples are available elsewhere for other actions you may need while processing applications:

- View a receipt on the Details page
- Upload a document on the Details page

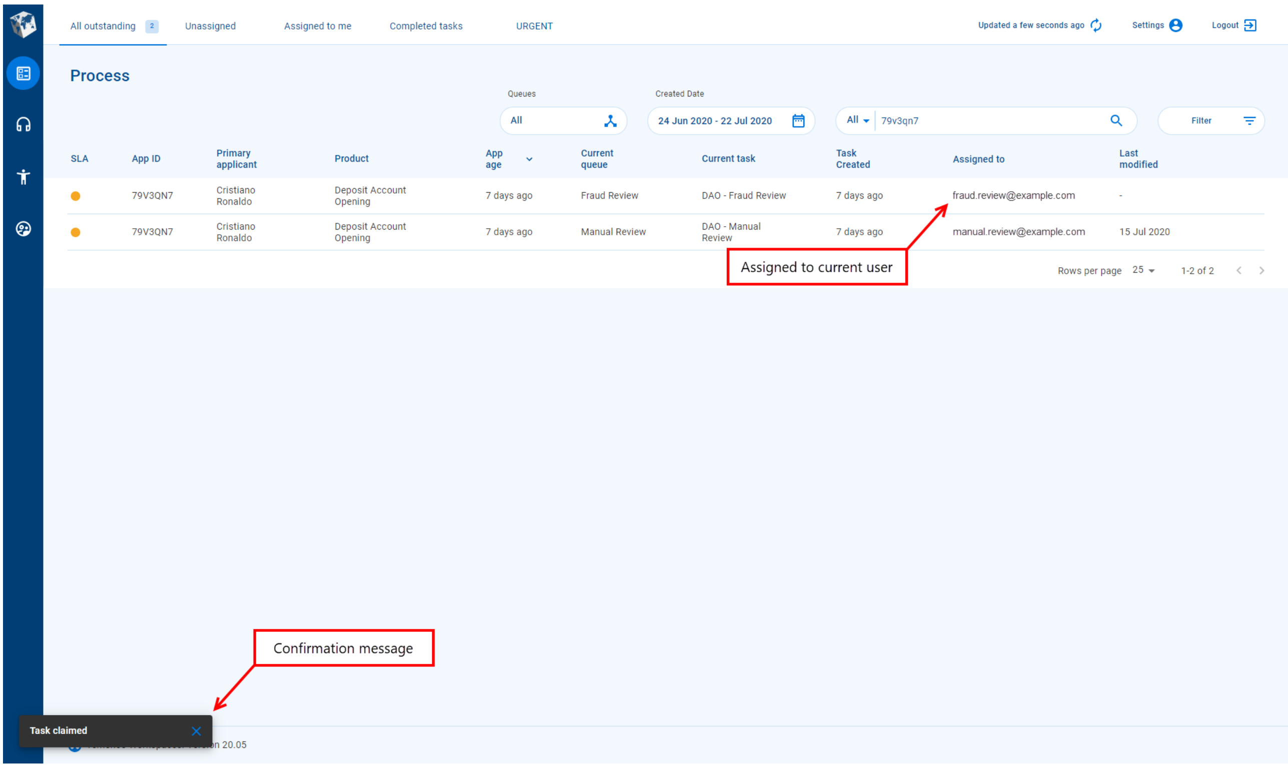
Claim a Task

This example shows you how to claim a task on the List page, using the search feature to locate the task to be claimed.

1. Login to Workspaces and select the **Process** space. The List page is displayed.
2. Click in the (Search) box then type the full App ID to search for tasks with this App ID. In this example, the App ID is "79V3QN7", and two tasks are found.



3. Point your cursor at the task that you want to claim – the available actions appear at the right-hand side. Click ⊞ (Claim) to assign the task to yourself. A message confirming you have claimed the task is displayed briefly in the bottom left corner.



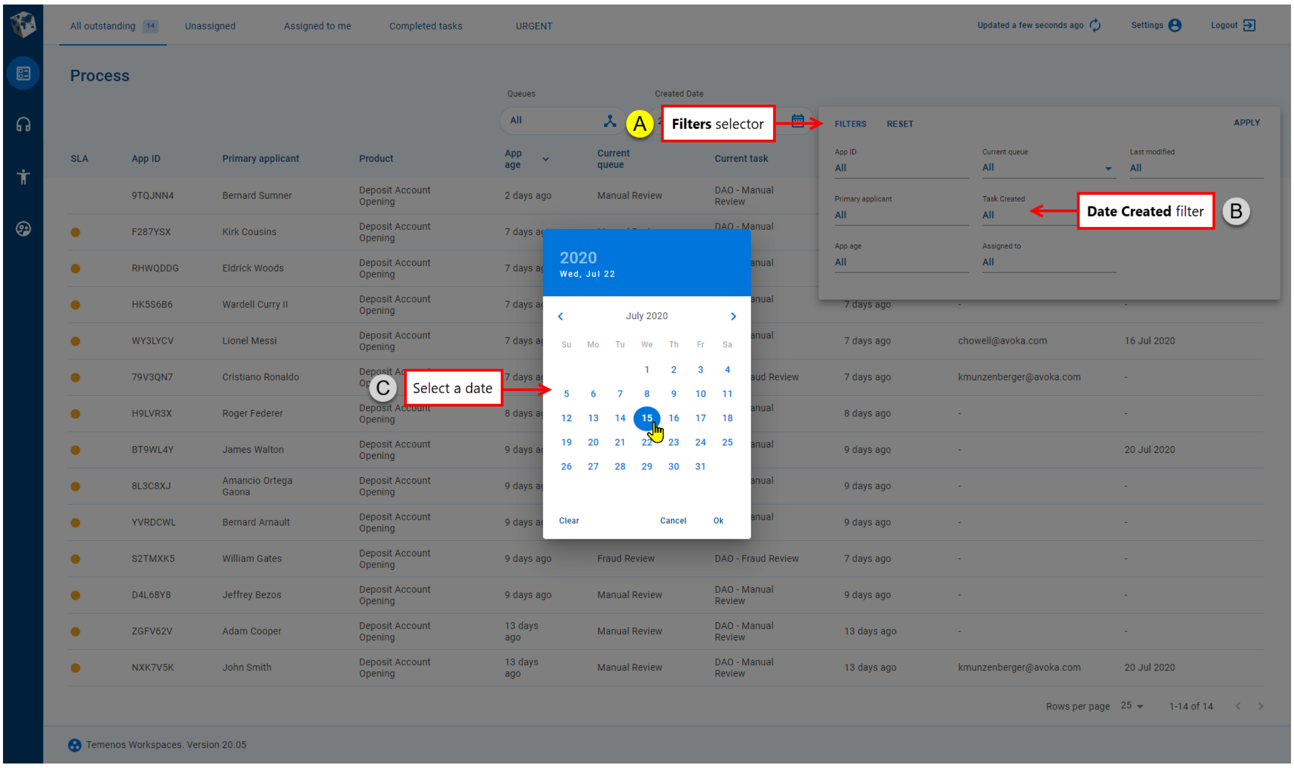
Alternatively, you can click the task to display its application details and then click the **Claim** button on the Details page.

Release a Task

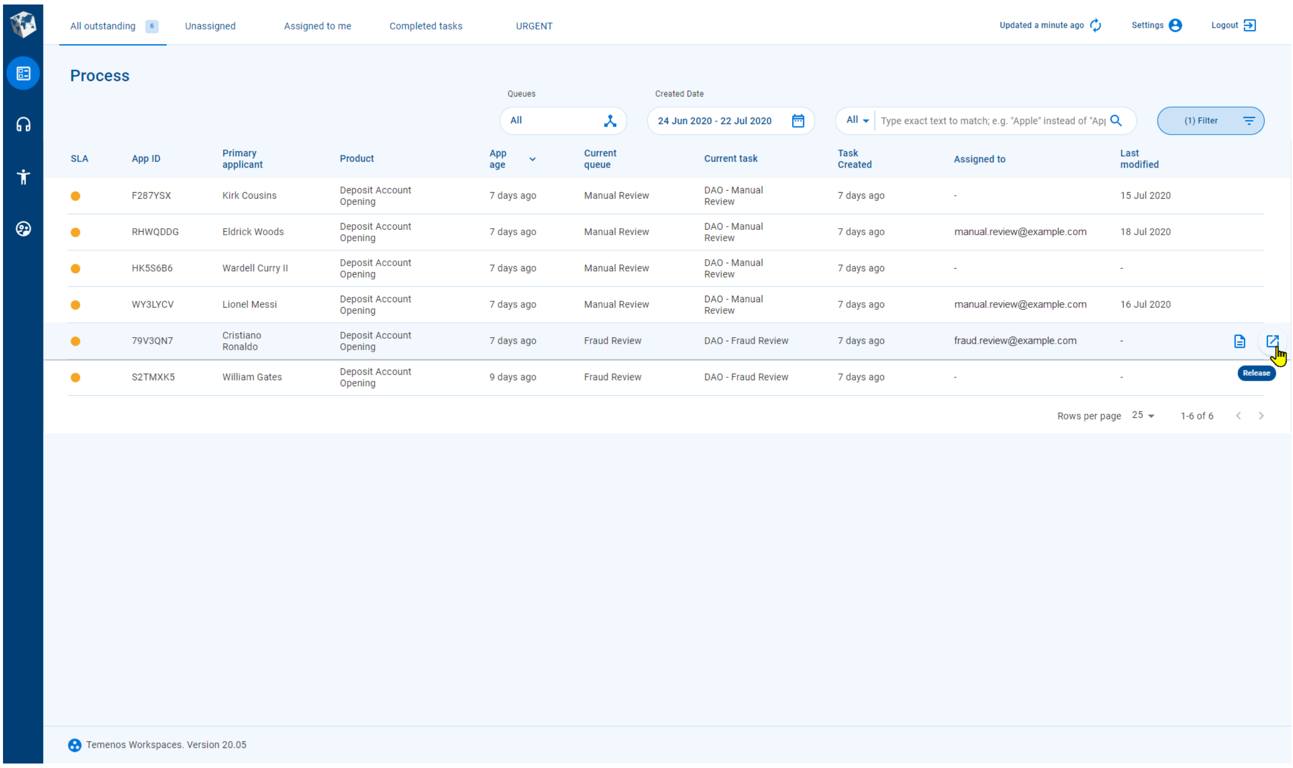
This example shows you how to locate a task using the filter feature then release the task so that it's no longer assigned to you.

1. Login to Workspaces and select the **Process** space.
2. Click **Filter** to display the **Filters selector** then enter one or more filters that will help you to narrow down the list of tasks and make it easier to see the task you want to release. In this example, we know that the

application was created on 15 July 2020, so we'll filter on that date.



3. Now, you can release the task. Point your mouse at the task you want to release – the available actions appear at the right-hand side. Click  (Release) and the task will be assigned no longer. A message confirming that you have released the task is displayed briefly in the bottom left corner.

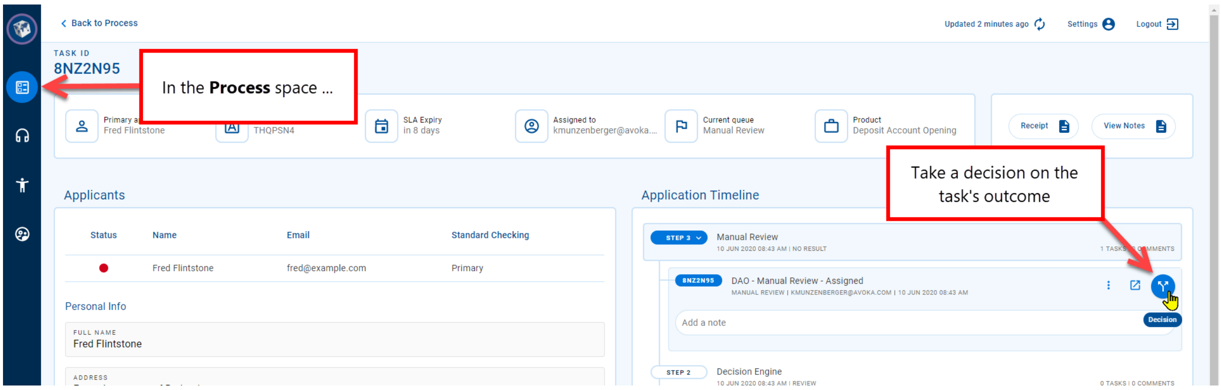


Alternatively, you can click the task to display its details, then click **Release** on the Details page.

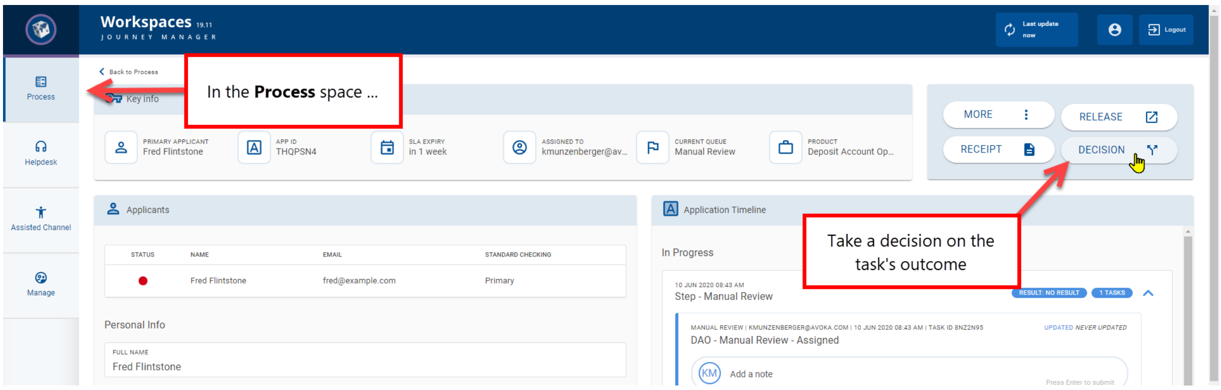
Take a Decision - Approve an Application

This example shows you how to take a decision about a task assigned to you so that the associated application progresses in its life cycle. In this example, we'll kick off the process to send an application for a fraud check then save without submitting so that we can go and find some information we need for the supporting note. Finally, we'll resume and complete the decision process.

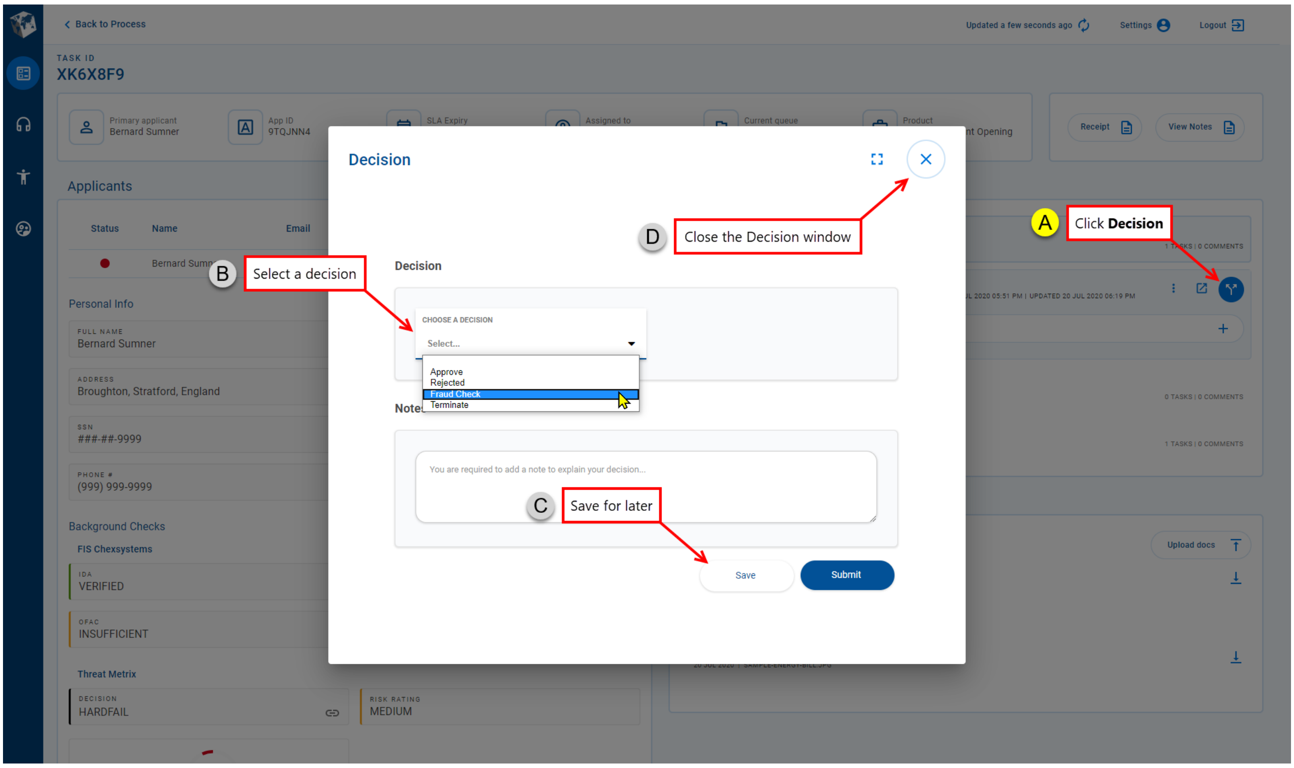
1. Follow the steps in the previous example to claim a task. Note that you could replace the search with any options that help you to locate the task. You can skip this step if you've just done it or if the task you want to act on is already assigned to you.
2. Click the task to display it's application details then click a **Decision** button to display the Decision window.
   - **Workspaces v20.05** – Click the (Decision) icon button for the selected task in the Timeline.



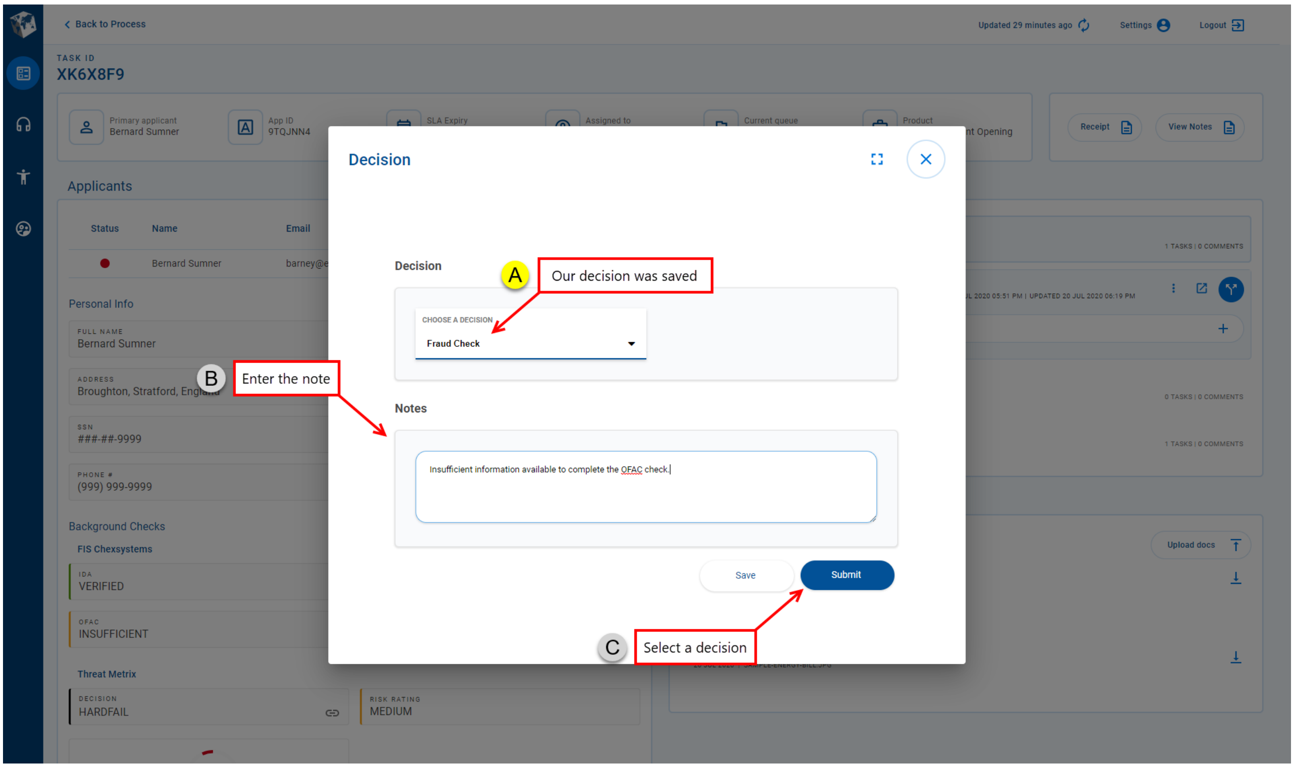
   - **Workspaces v19.11 and earlier** – Click the Decision button in the Action panel.



3. Notice that the **Choose a Decision** box is empty. Select an option in the **Choose a Decision** dropdown that matches the decision we want to take, in this case **Fraud Check**. We need to include information in our note to support the decision but can't recall the exact details, so click **Save** and close the Decision window, returning to the Details page.



4. With the Decision window closed, we can find the application details we need to support our decision. Once we've found the supporting information, we can click **Decision** to display the Decision window again. Notice that **Choose a Decision** still has the value **Fraud Check** that we selected previously. Enter the note supporting our decision, then click **Submit**.



After submitting the decision, Workspaces returns to the Process space List page where the task may not be available as it may no longer satisfy the active search or filter criteria; for example, it may be on a different queue.

Workspaces Helpdesk

Workspaces | Workspaces User | 19.05 | 20.05

> Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

Sometimes, applicants need help. Some applicants need help to complete their application while others just want to know how their application is progressing. Whatever the inquiry, customer service staff can use Workspaces to help answer customer questions quickly and efficiently.

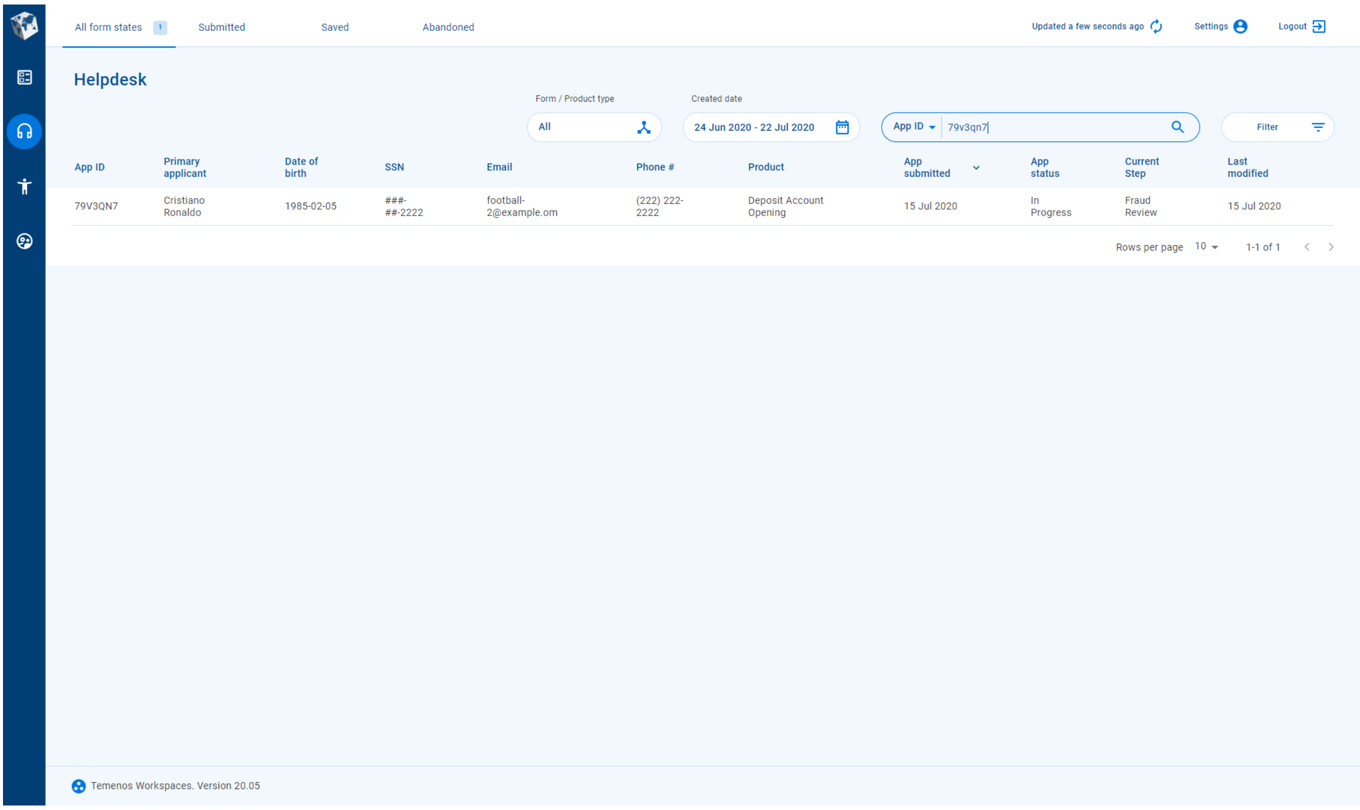
Customer service needs are supported in Workspaces via the inclusion of a Helpdesk space. In its default configuration, the Helpdesk space includes a List page and a Details page that are configured with features designed to make activities related to customer service fast and efficient, so that you can focus on providing a great customer service experience.

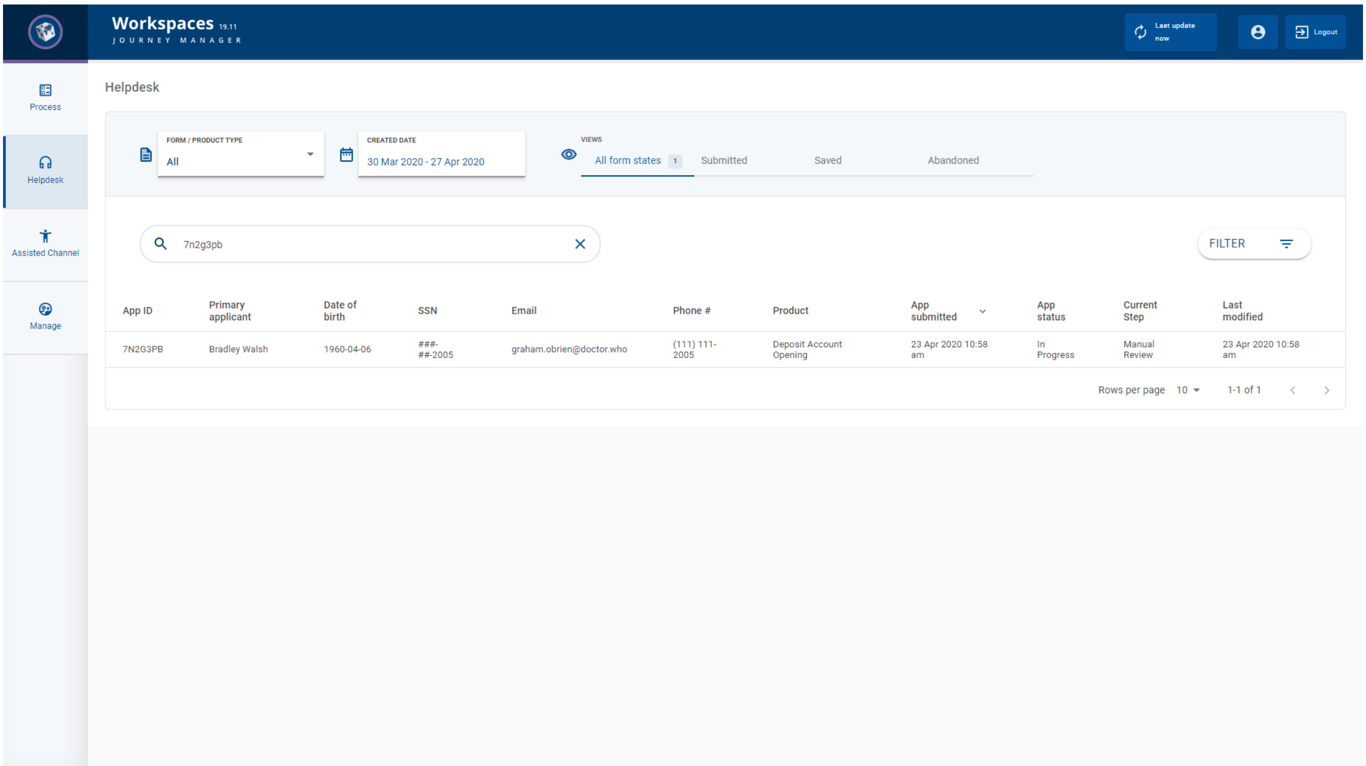
List Page

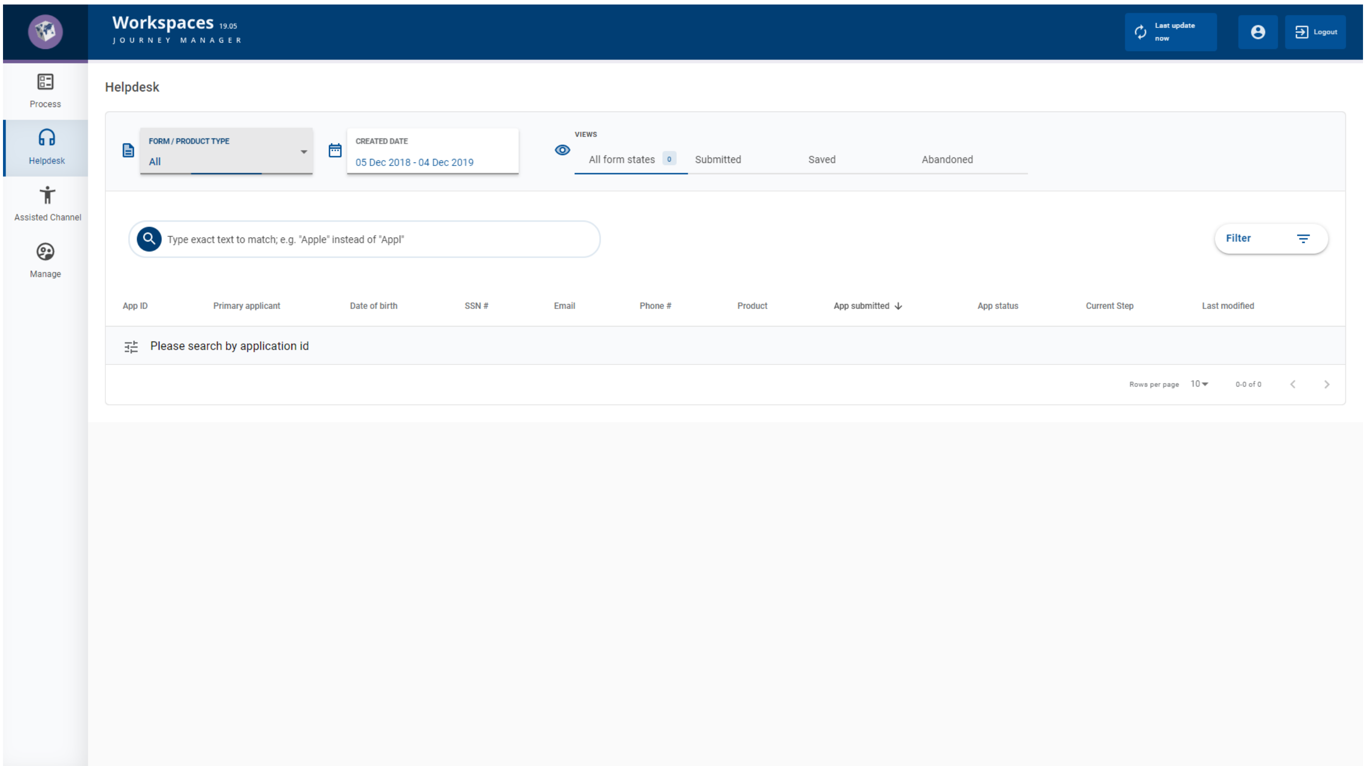
The List page in the Helpdesk space includes all of the standard features of a Workspaces List page.

- An item list, containing a list of applications, which may be empty initially depending upon how it is populated.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11
- A global filter that restricts the applications in the item list to just those for a selected form / product type.
- A second global filter, Created Date, that restricts the applications in the item list based on the date they were created.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- Flexible search, filter and sort options that you can use to refine the set of applications in the item list.
- Paging tools that you can use to browse the item list.

v20.05 v19.11 v19.05 and earlier







The item list on the Helpdesk space's List page is empty by default. You might find this surprising but there's a very good reason why this is the case. When you start helping an applicant with an inquiry, you don't have any information about the applicant or their application, and Workspaces reflects this situation via an empty item list. Once you obtain some information from the applicant, you can use this information to start looking for applications that are related to the applicant's inquiry. The most useful information you can get from the applicant is the App ID, but if the applicant doesn't have that to hand, you can try searching or filtering on other criteria, then browse the item list. To learn more about searching and filtering, see Search for a Task or Application and Filter the Item List.

Once you've found the application you're interested in, you can select it in the item list to perform an action on it. To learn about the available actions, see Helpdesk Actions below.

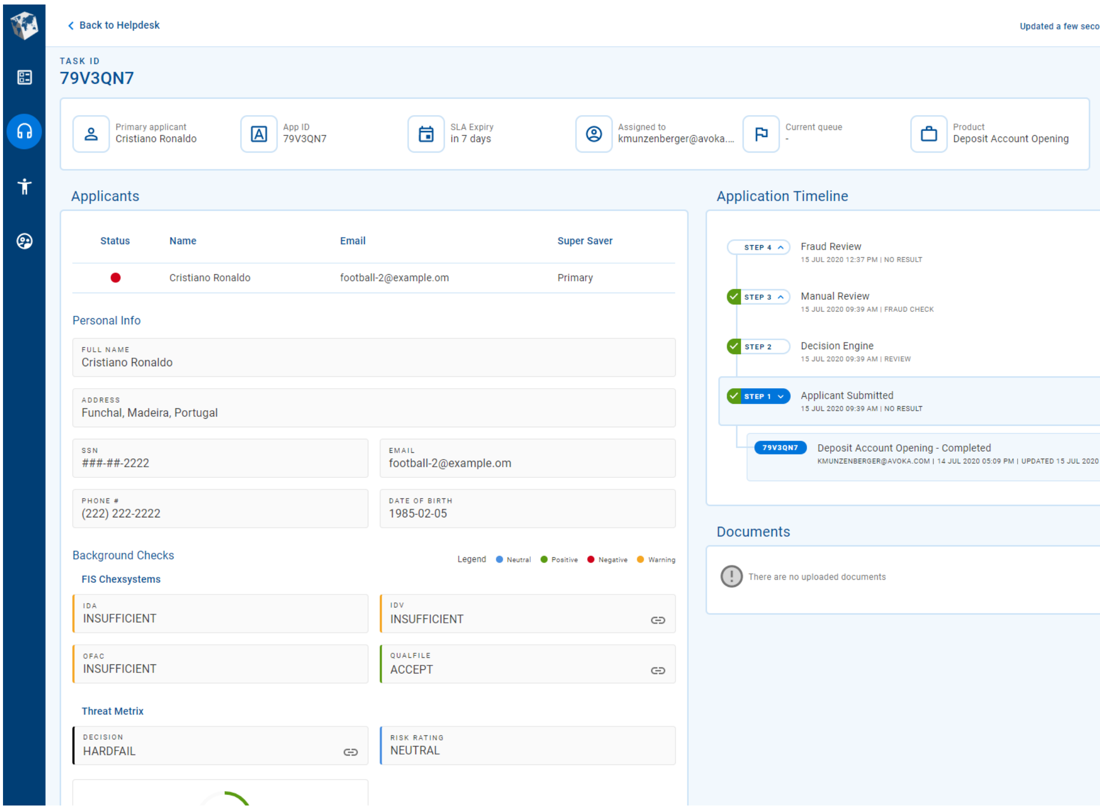
Details Page

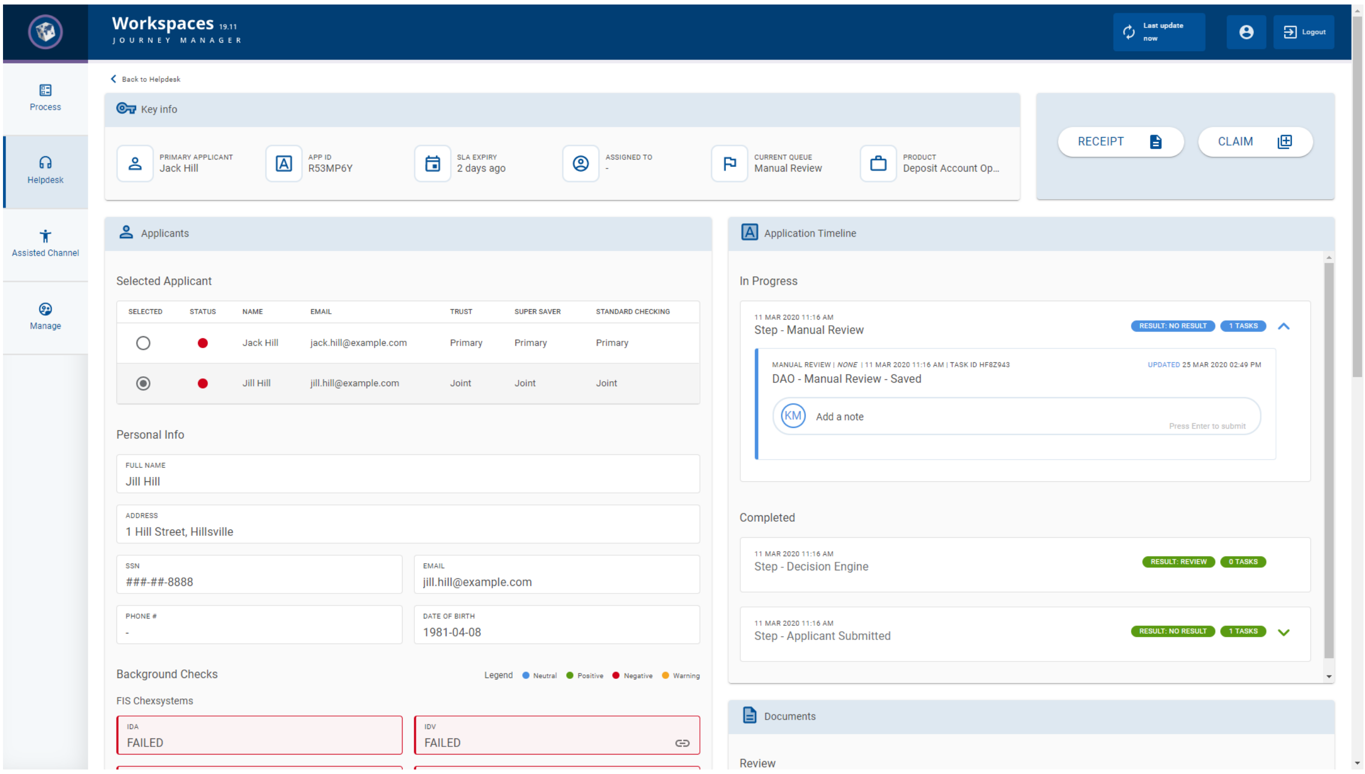
The Details screen in the Helpdesk space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected application and its tasks, and provides access to the Helpdesk actions. This includes the following features, each of which is contained in a separate card or card section:

- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. | 19.11
- A set of standard actions that you can perform in the Helpdesk space at the current stage of the application's life cycle. | 20.05
- A list of applicants and products from which you can select an applicant to view more details. | 19.11
- Personal information for the selected applicant, including identity and contact details. | 19.11
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability. | 19.11
- A feature-rich application timeline of all the steps that the application has progressed through, showing key application details as well as tasks with accompanying notes. | 20.05
- Timeline task items that show the application's progress; select one to reload the Details screen and present the application in the context of the selected task. | 20.05
- A dynamic set of actions that are applicable to the selected timeline task and currently available for you to perform, thereby giving you confidence that you're acting on the right task. | 20.05
- Attached relating to the application. | 19.11
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

To learn about these standard features, click the links above or see The Application Details Screen.

v20.05 v19.11 and earlier





Helpdesk Actions

The helpdesk actions are:

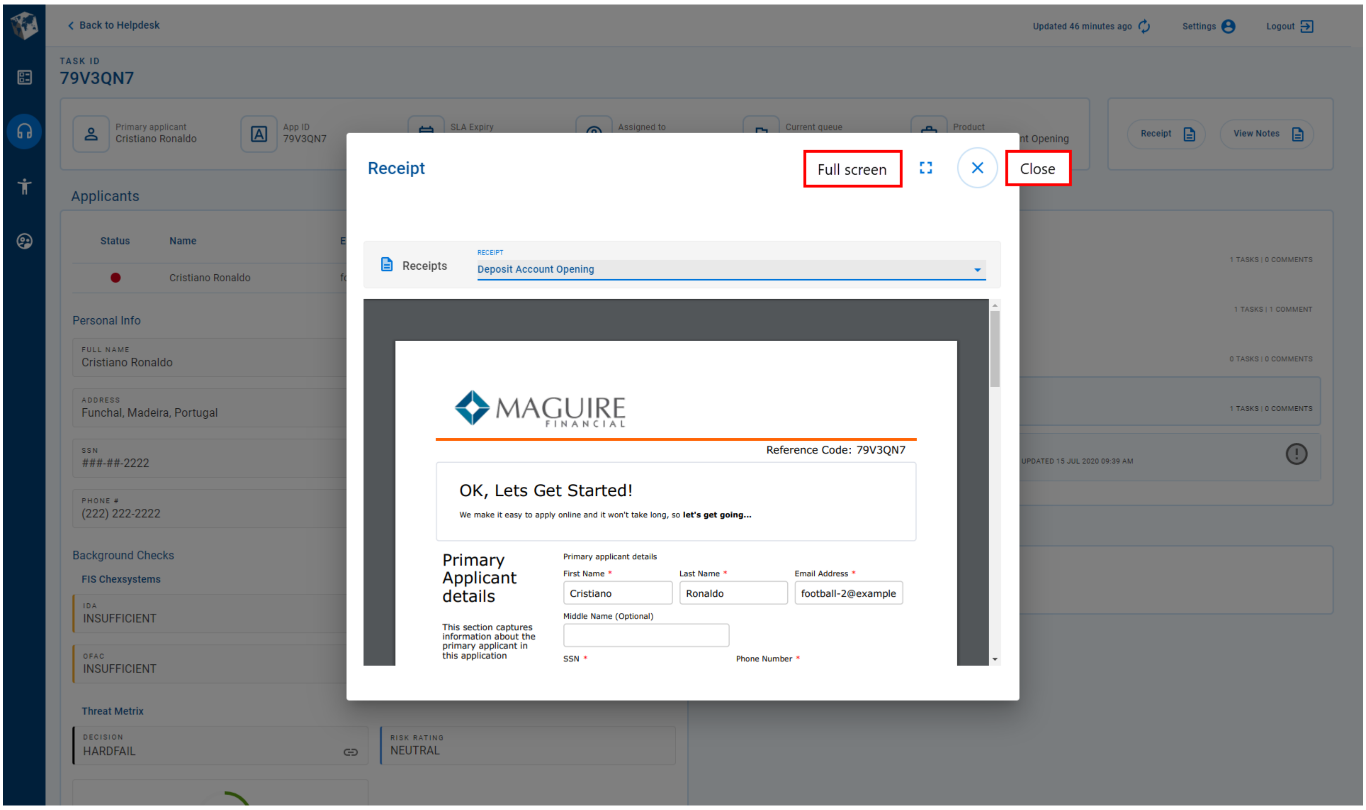
- Recover – Recover an abandoned or withdrawn application so that the applicant can continue with it.
- View Form – See a read-only view of an application that has been saved but not yet submitted.
- View Notes – View all of the notes from all of an application's tasks.
- Withdraw – Cancel an application that has been saved but not yet submitted.

The Receipt and View Form actions are similar in that they both provide a way to view information entered by the applicant, but there are differences in how you can interact with that information. The Recover and Withdraw actions allow you to change the status of applications, generally at an applicant's request. All of these actions are described below in the context of the Helpdesk space, including examples of how to use them.

View a Receipt

When you're working on a task or application, you often need to see the information that the applicant has submitted; for example, to inform the decision making process. You can use the Receipt action to view the information for a submitted application.

> To view the information in an application that has been saved but not yet submitted, use the View Form action.

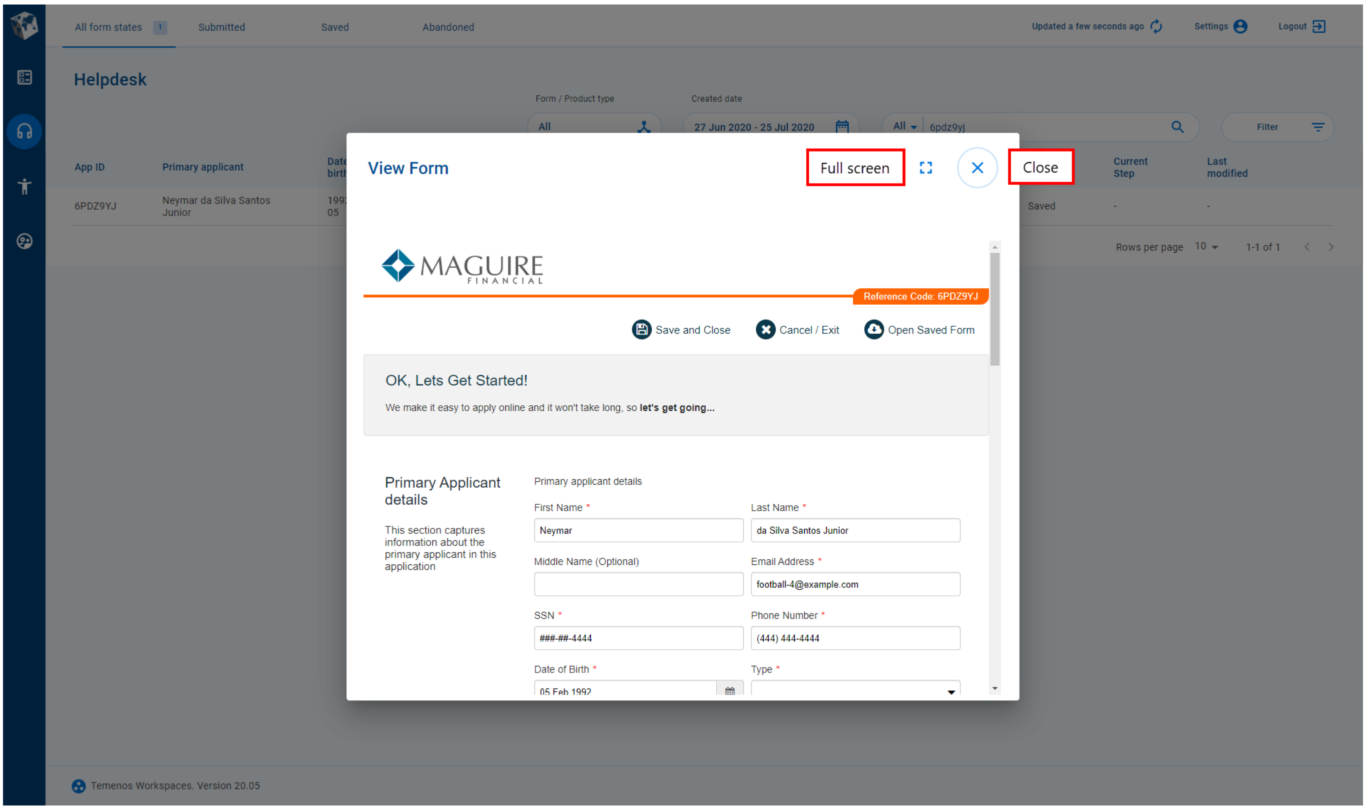


A receipt is a read-only view of the information submitted by the applicant, displayed in the same form that was used to capture that information. Note that a receipt does not allow you to change the application in any way.

View a Form

Some of the actions you perform in Workspaces rely upon you being able to see the information that has been entered and saved by an applicant; for example, when responding to a customer inquiry or assisting a customer to complete an application. You can use the View Form action to view the information in a saved application.

> To view the information in an application that has been submitted, use the Receipt action.



When you view a form, the information entered by the applicant is displayed in the same form that was used to capture that information. Viewing a form differs from viewing a receipt in that the form is not read-only. When you view a form, you can enter or update application information; for example, to help the applicant to complete their application.

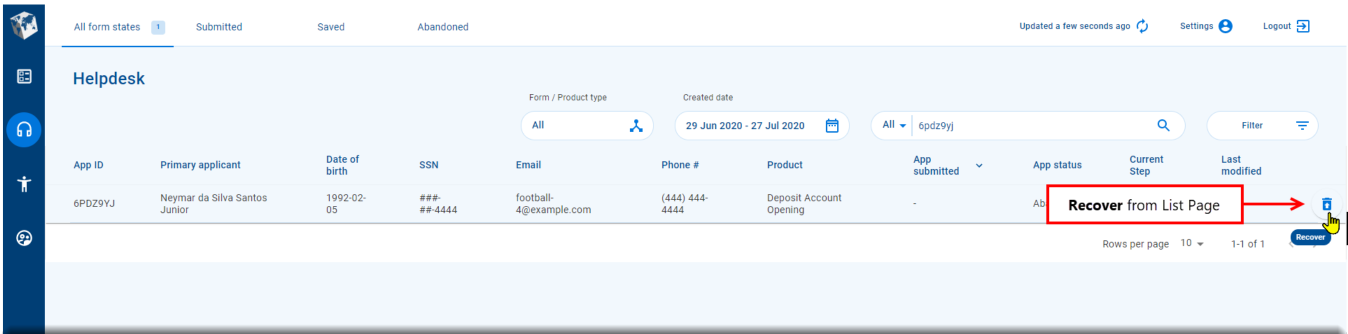
Recover an Application

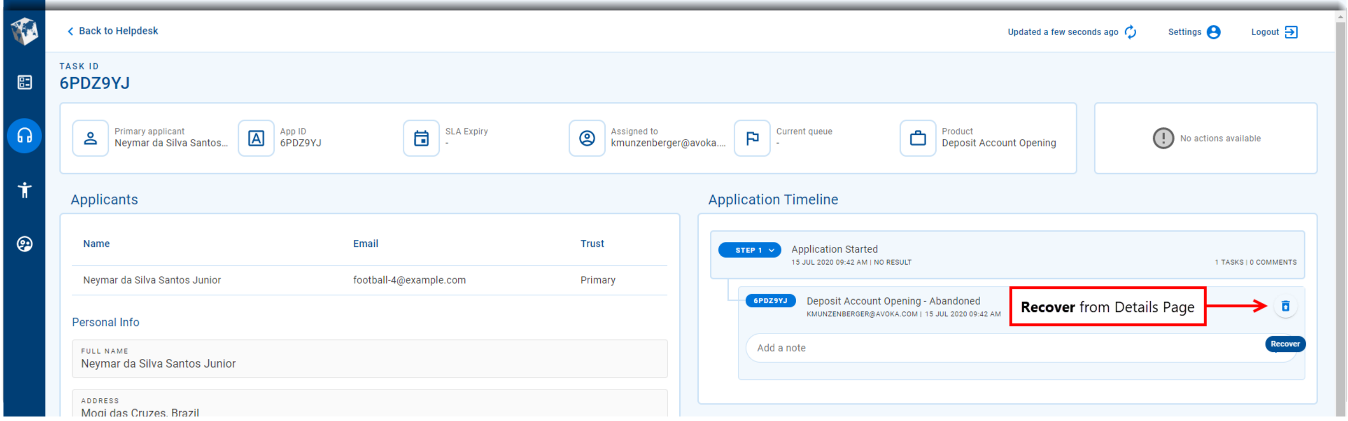
Let's say someone starts an application but their browser crashes before they can save or submit it. They give up on their application for now, and so it becomes . A short time later, the applicant decides to complete the application they started after all, so they call the support helpdesk. You're able to reassure the applicant because you can recover their application so that they can complete and submit it.

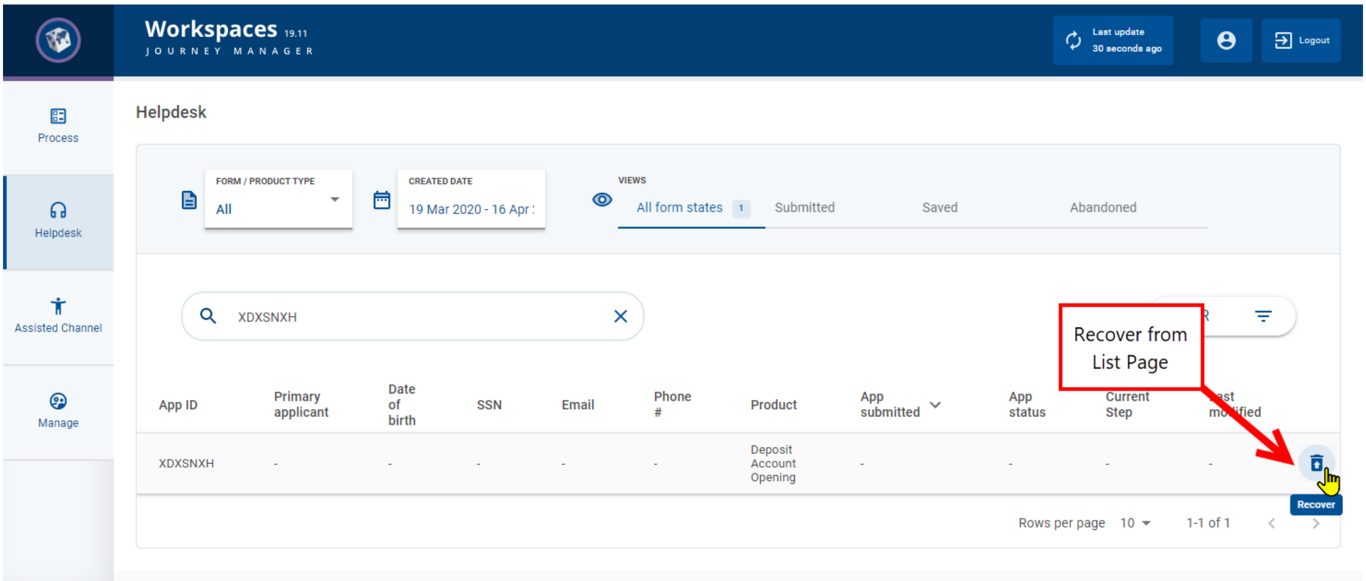
> Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

It's easy to recover an application. Go to the Helpdesk List screen and locate the application to be recovered, then select the Recover option. Alternatively, once you've found the application on the List page, you can view its Details page and recover the application from there. This latter approach can be useful if you 're not able to determine from the limited details on the List page whether you've got the right application.

v20.05 v19.11 and earlier


All form states
Submitted
Saved
Abandoned
Updated a few seconds ago
Settings
Logout
Helpdesk
Form / Product type
Created date
All
29 Jun 2020 - 27 Jul 2020
6pdz9yj
Filter
App ID
Primary applicant
Date of birth
SSN
Email
Phone #
Product
App submitted
App status
Current Step
Last modified
6PDZ9YJ
Neymar da Silva Santos Junior
1992-02-05
###-##-4444
football-4@example.com
(444) 444-4444
Deposit Account Opening
Recover from List Page
Rows per page 10
1-1 of 1
Recover


Back to Helpdesk
Updated a few seconds ago
Settings
Logout
TASK ID
6PDZ9YJ
Primary applicant
Neymar da Silva Santos...
App ID
6PDZ9YJ
SLA Expiry
Assigned to
kmunzenberger@avoka...
Current queue
Product
Deposit Account Opening
No actions available
Applicants
Name
Email
Trust
Neymar da Silva Santos Junior
football-4@example.com
Primary
Personal Info
FULL NAME
Neymar da Silva Santos Junior
ADDRESS
Mogi das Cruzes, Brazil
Application Timeline
STEP 1
Application Started
15 JUL 2020 09:42 AM | NO RESULT
1 TASKS | 0 COMMENTS
6PDZ9YJ
Deposit Account Opening - Abandoned
KMUNZENBERGER@AVOKA.COM | 15 JUL 2020 09:42 AM
Recover from Details Page
Add a note
Recover


Workspaces 19.11
JOURNEY MANAGER
Last update 30 seconds ago
Logout
Process
Helpdesk
Assisted Channel
Manage
Helpdesk
FORM / PRODUCT TYPE
All
CREATED DATE
19 Mar 2020 - 16 Apr
VIEWS
All form states
Submitted
Saved
Abandoned
XDXSNXH
Recover from List Page
App ID
Primary applicant
Date of birth
SSN
Email
Phone #
Product
App submitted
App status
Current Step
Last modified
XDXSNXH
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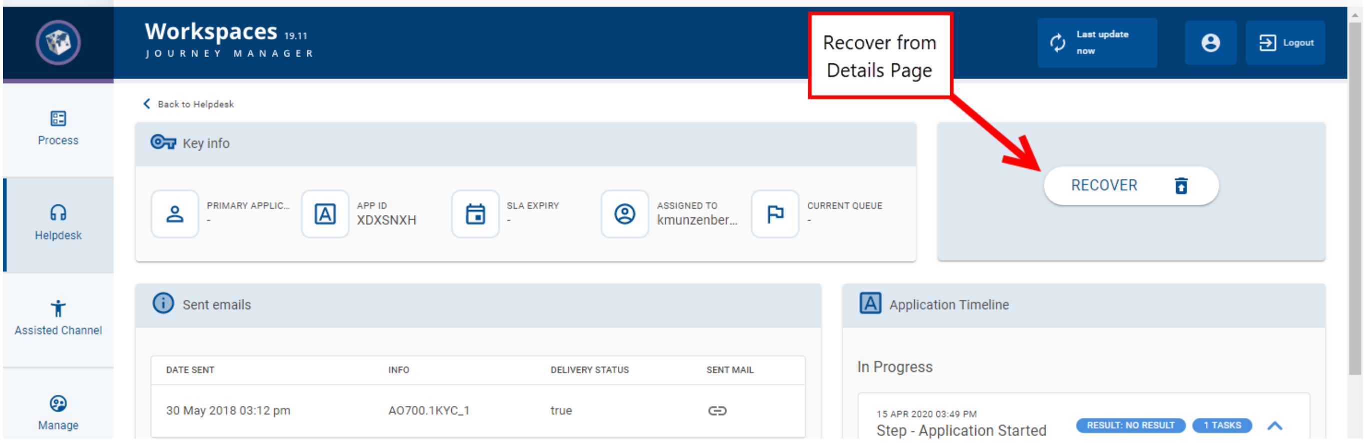
Recover
Rows per page 10
1-1 of 1


Workspaces 19.11
JOURNEY MANAGER
Recover from Details Page
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Back to Helpdesk
Key info
PRIMARY APPLIC...
APP ID
XDXSNXH
SLA EXPIRY
ASSIGNED TO
kmunzenber...
CURRENT QUEUE
RECOVER
Sent emails
DATE SENT
INFO
DELIVERY STATUS
SENT MAIL
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AO700.1KYC_1
true
Application Timeline
In Progress
15 APR 2020 03:49 PM
Step - Application Started
RESULT: NO RESULT
1 TASKS

Workspaces does not mandate how an applicant can access a recovered application in the default configuration as this is an aspect that will be specific to each Workspaces portal. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their application - and this will include a link to take them back to their application.

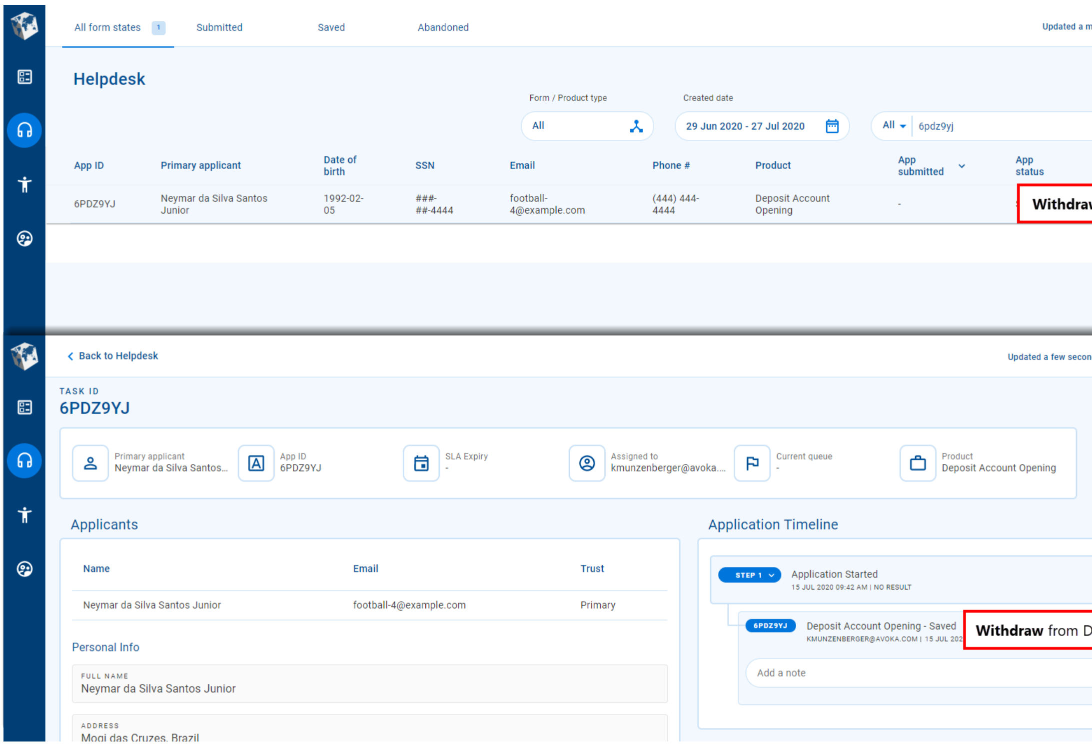
In addition to abandoned applications, an application that has been withdrawn can also be recovered.

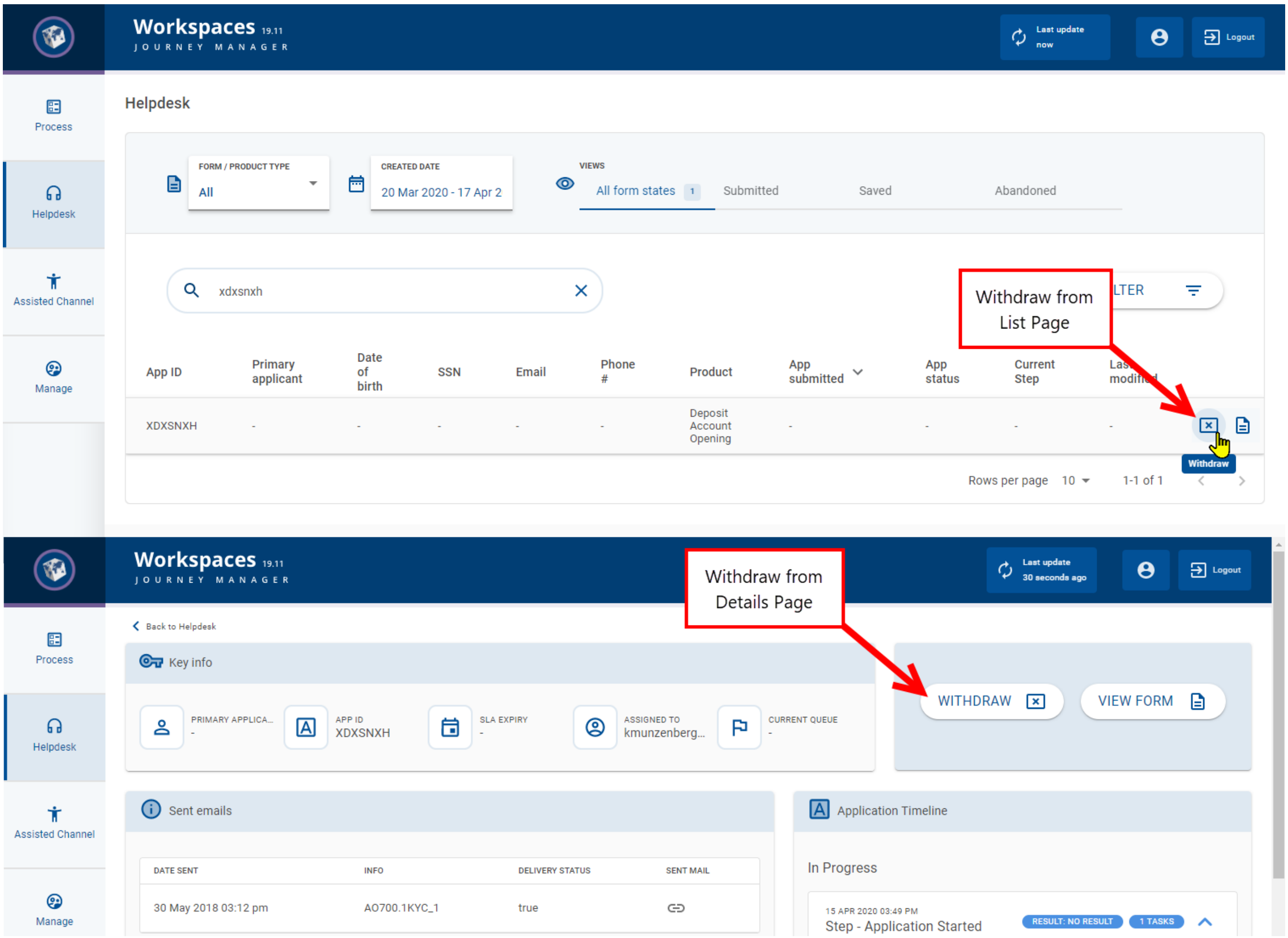
Withdraw an Application

Now, let's say someone starts an application but, before submitting it, they decide not to proceed with the application after all. So, they contact the support helpdesk and ask for the application to be canceled. You can help the applicant here by withdrawing the application.

Just like recovering an application, it's easy to withdraw an application. Go to the Helpdesk List screen and locate the application to be withdrawn, then select the Withdraw option. Alternatively, once you've found the application on the List screen, you can view its Details screen and withdraw the application from there. This latter approach can be useful if you 're not able to determine from the limited details on the List screen whether you've got the right application.

v20.05 v19.11 and earlier





An application that has been withdrawn can subsequently be recovered should the applicant have a change of heart.

Helpdesk Action Examples

Let's go step by step through some examples to demonstrate how you can use the helpdesk actions when responding to applicant inquiries.

You can find examples below for the following actions:

- View a receipt on the Details page
- View a form on the List page
- Recover an abandoned application on the List page
- Withdraw an unsubmitted application on the Details page

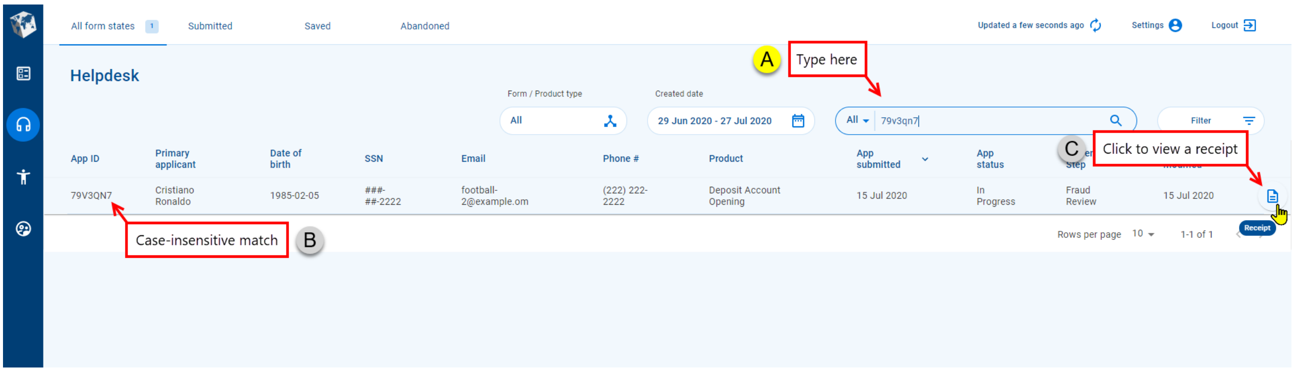
Step-by-step examples are available elsewhere for other actions you may need while responding to applicant inquiries:

- Upload a document on the Details page

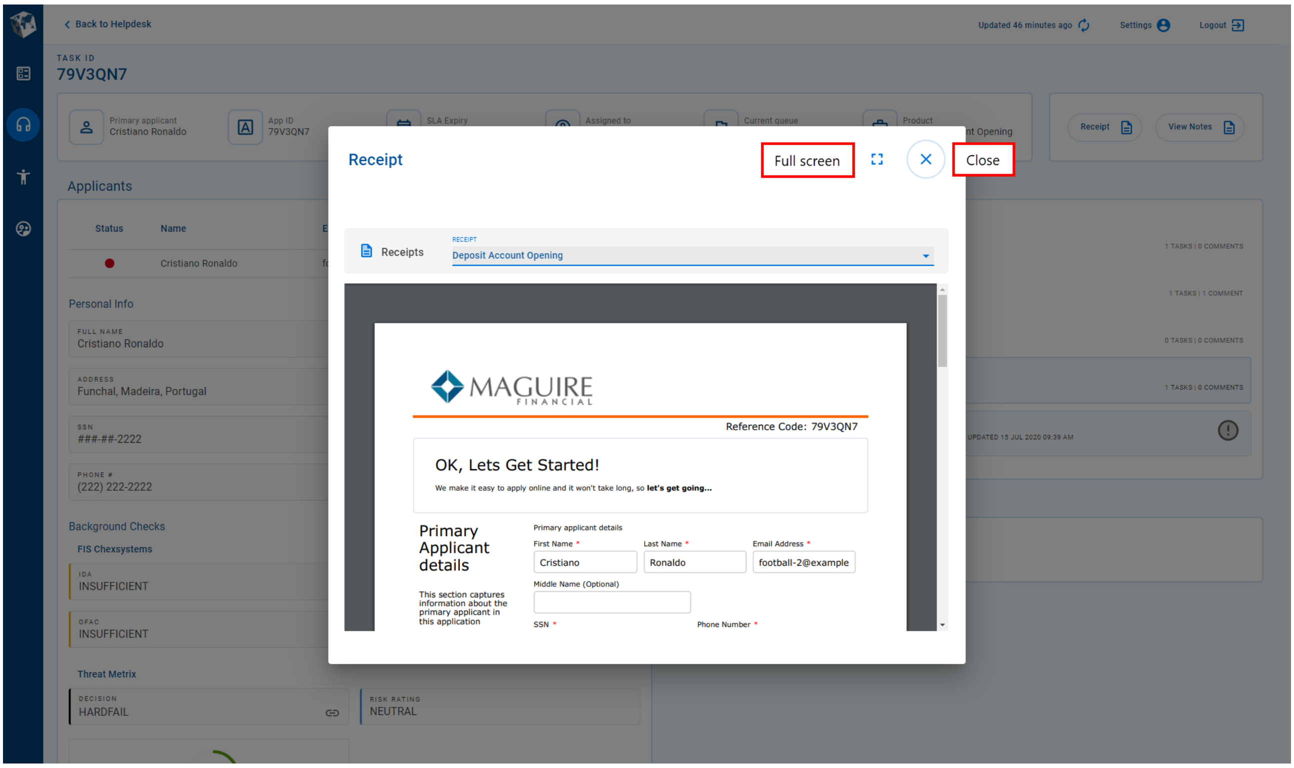
View a Receipt

This example shows you how to view a receipt from the Details page, using the search feature to locate the application to be viewed.

1. Login to Workspaces and select the **Helpdesk** space. The List page is displayed.
2. Click in the (Search) box then type the full App ID to search for applications with this App ID. In this example, the App ID is "79V3QN7", and just one item is found.



3. Click the application item to display its details, then click **Receipt** on the Details page. The Receipt window opens displaying the application information. Scroll bars are available to allow you to see the full page, and you can use any navigation tools on the form to see all of the application.

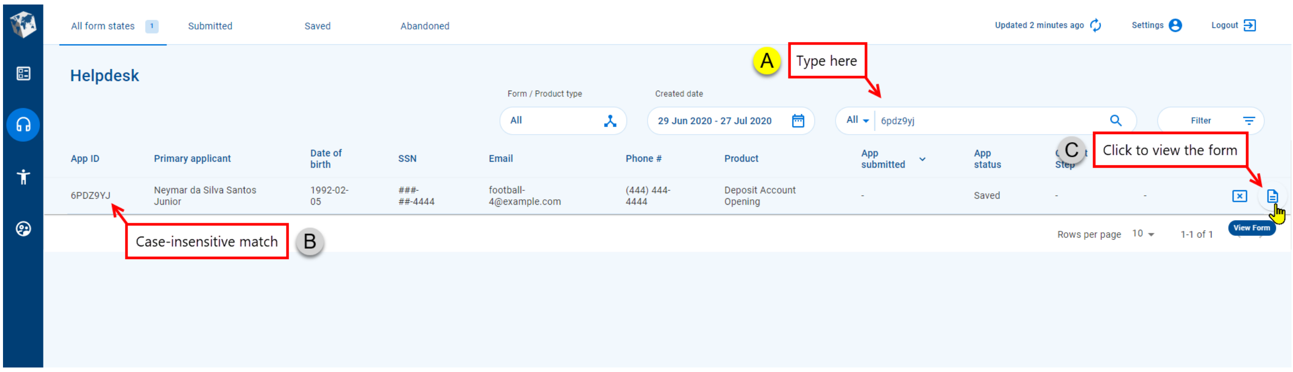


4. When you're finished viewing the receipt, click (Close) in the top-right corner to close the Receipt window and return to the Details page.

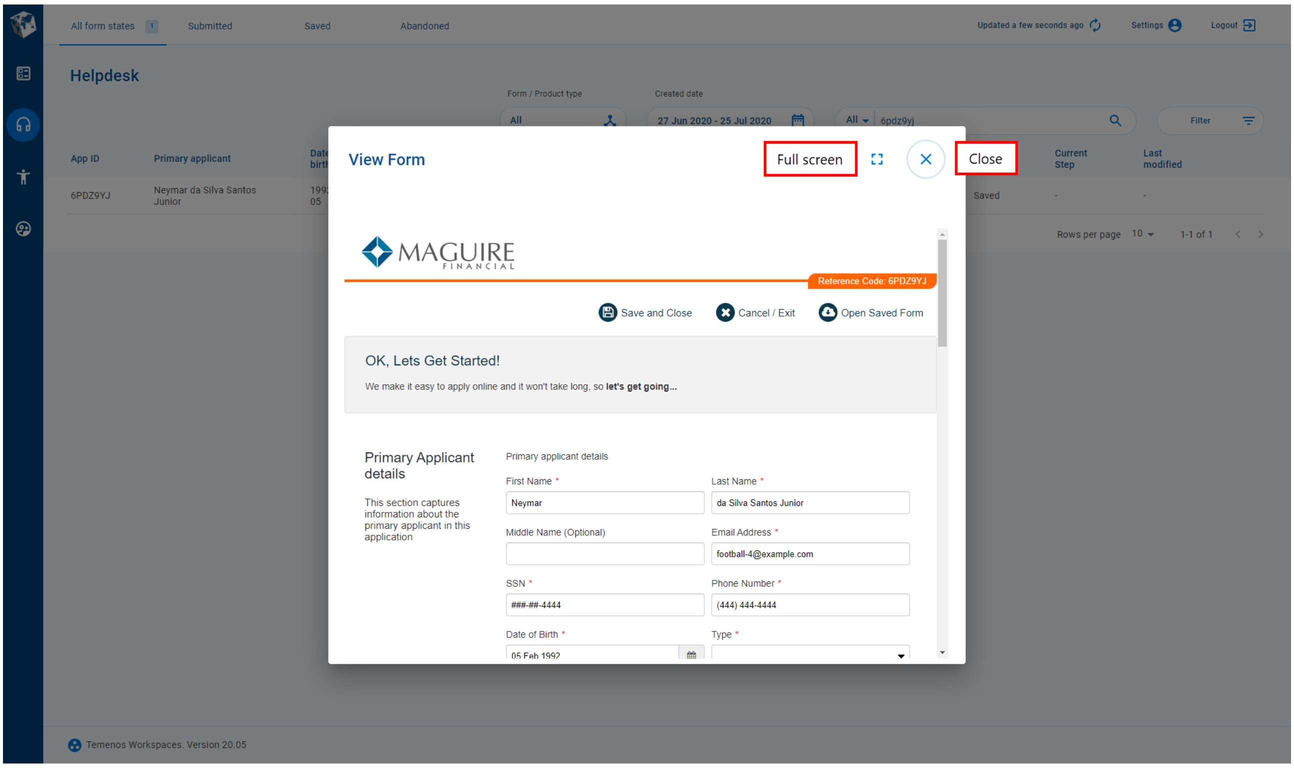
View a Form

This example shows you how to locate a task for a saved application using the search feature, then view and update the saved information.

1. Login to Workspaces and select the **Helpdesk** space.
2. Click in the (Search) box then type the full App ID to search for applications with this App ID. In this example, the App ID is "6PDZ9YJ", and just one item is found.



3. Now, you can view the saved information for this application. Point your cursor at the item you found – the available actions appear at the right-hand side of the item list.
4. Click (View Form) . A window opens displaying the application in the same form used to capture the original information. Scroll bars are available to allow you to access the full page, and you can use any navigation tools on the form to access all of the application.



5. Update the form, adding or modifying details as appropriate, then click **Save and Close** on the form to save your changes.

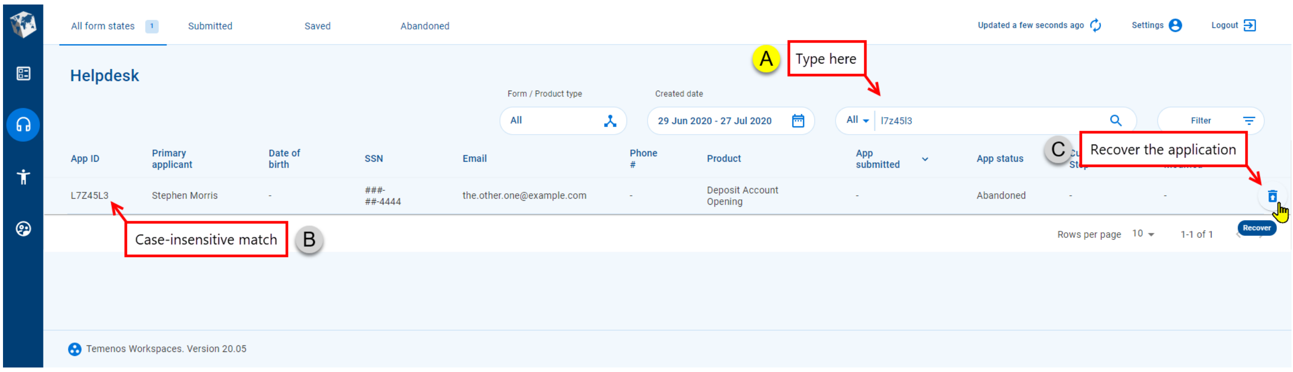
6. When you're finished updating the form, click ✕ (Close) in the top-right corner to close the View Form window and return to the List page.

Recover an Abandoned Application

This example shows you how to locate an abandoned application using the search feature, then recover the application from the List page.

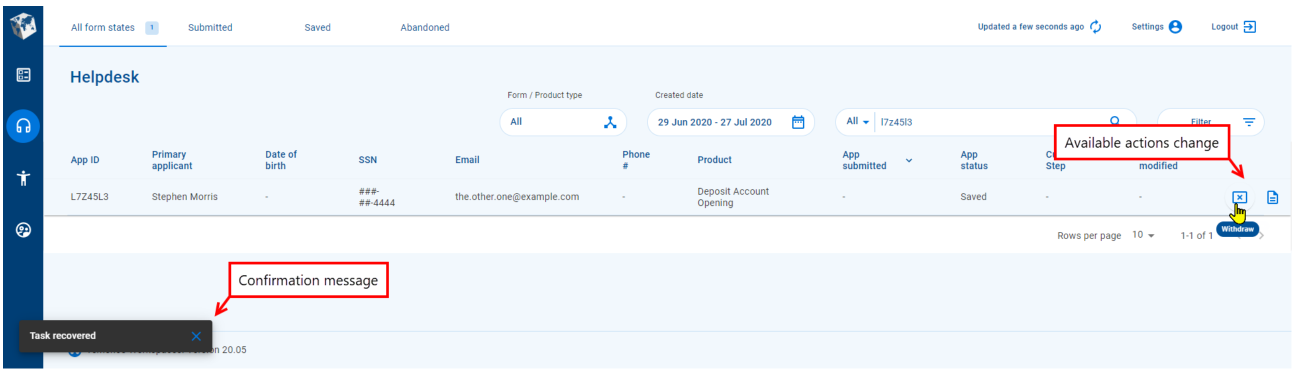
1. Login to Workspaces and select the **Helpdesk** space.

2. Click the (Search) box then type the full App ID to search for all matching applications. In this example, the App ID is "L7Z45L3", and just one item is found.



3. Point your cursor at the item you found – the available actions appear at the right-hand side of the item list. The (Recover) action is available here because even though the application has not been submitted yet, it has been saved (either intentionally by the applicant or in the background by the form) before becoming abandoned or being withdrawn.

4. Click (Recover). The available actions change and a message confirming you have recovered the application is displayed briefly in the bottom left corner.

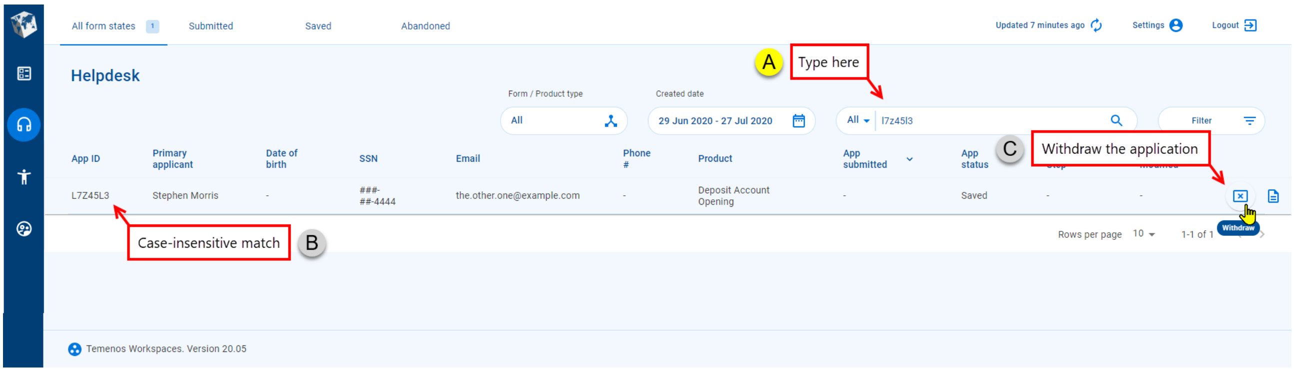


The application is now available for the applicant to continue. How the applicant accesses the recovered application will depend on how your Workspaces portal is configured. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their application - and this will include a link to take them back to their application.

Withdraw an Unsubmitted Application

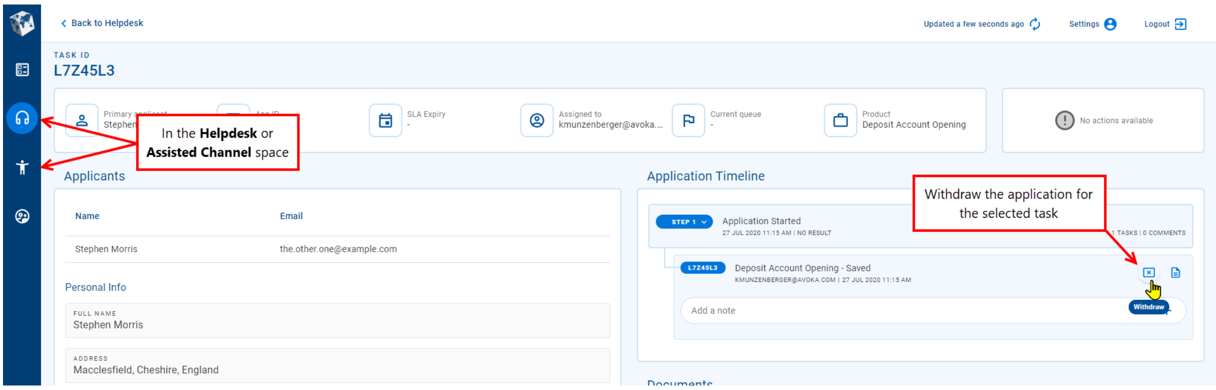
This example shows you how to locate an unsubmitted application using the search feature, view the application's details to confirm you have the correct application, then cancel the application by withdrawing it on the Details page.

1. Login to Workspaces and select the **Helpdesk** space.
2. Click the (Search) box then type the full App ID to search for all matching applications. In this example, the App ID is "L7Z45L3", and just one item is found.



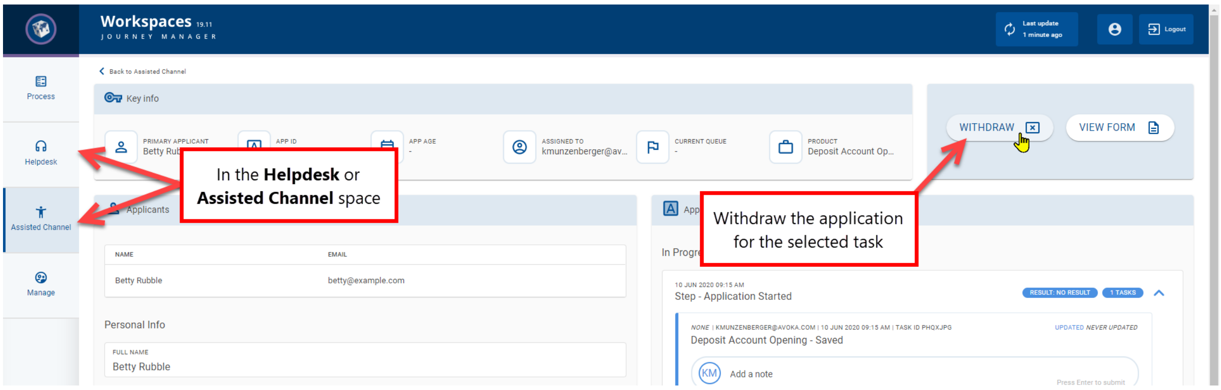
3. If you point your cursor at the item you found, the available actions appear at the right-hand side of the item list.The (Withdraw) action is available here because even though the application has not been submitted yet, it has been saved (either intentionally by the applicant or in the background by the form). While you could withdraw the application here, click the application item instead to display its details.
4. On the Details page, you can see more information about the application which is useful to confirm that this is indeed the application that you want to withdraw. Having confirmed that you're looking at the correct application, click a **Withdraw** button.

- **Workspaces v20.05** – Click the ☒ (Withdraw) icon button for the selected task in the Timeline.



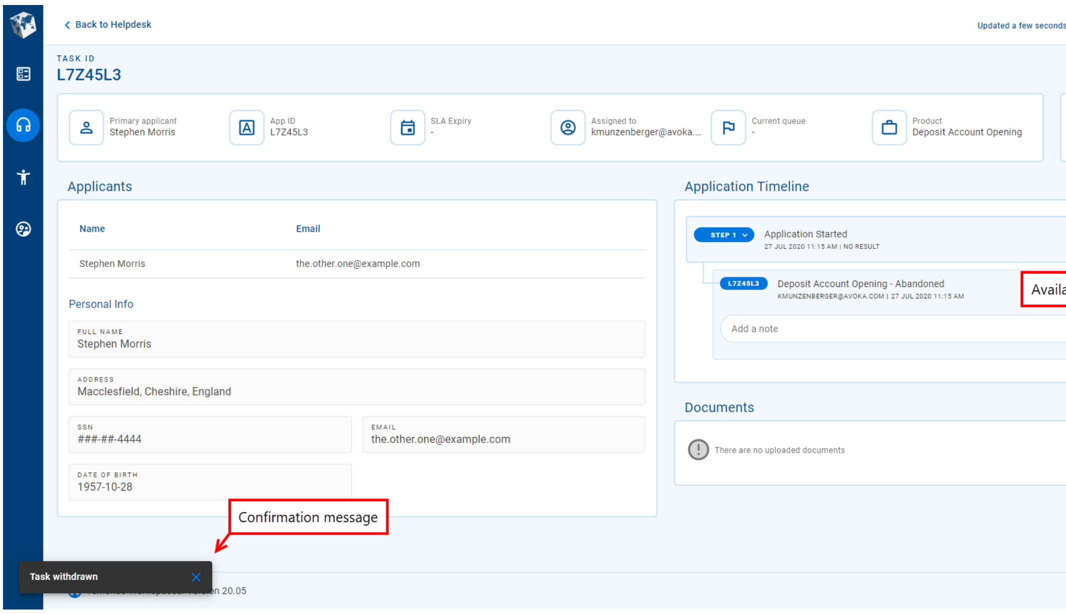
Note that the Withdraw action is only available for the first task of an application that has been saved but not yet submitted.

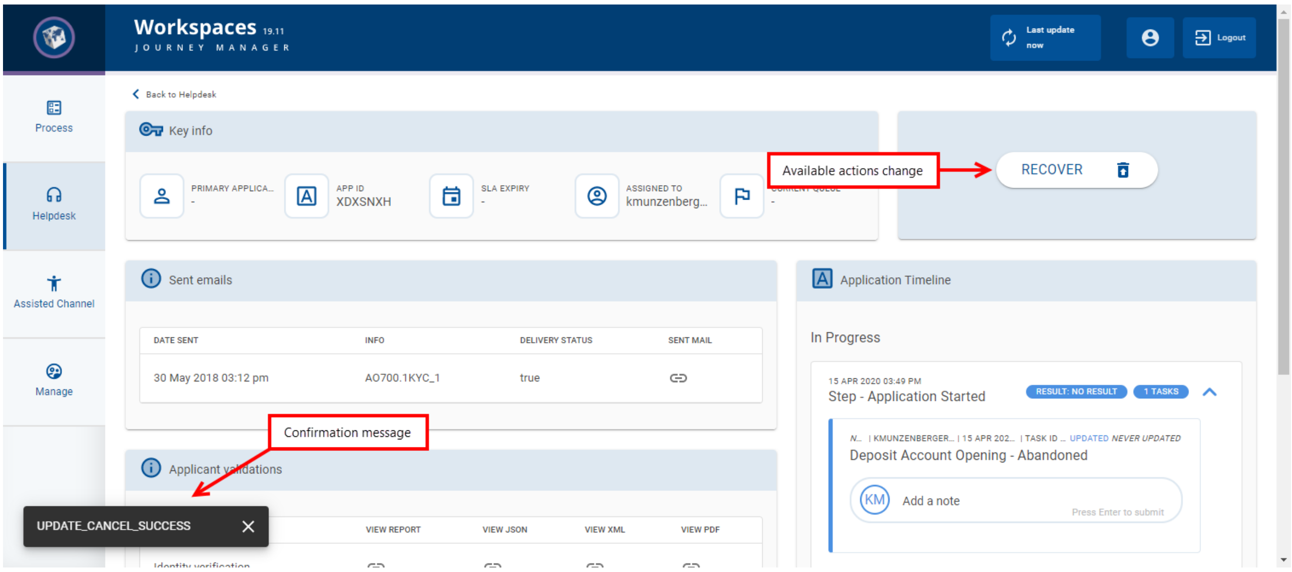
- **Workspaces v19.11 and earlier** – Click the Withdraw button in the Action panel.



5. A message confirming you have withdrawn the application is displayed briefly in the bottom left corner.

v20.05 v19.11 and earlier





The application has now been withdrawn, but can be recovered should the applicant want to continue with this application.

Workspaces Assisted Channel

Workspaces | Workspaces User | 19.05 | 19.11

Some of the images and text in this topic may be different to what you see in your Workspaces portal. This is because Workspaces is a highly configurable product, and this topic describes features based on the default configuration which may differ from how your Workspaces portal is configured; for example, you may see your company's branding or other fields. Nevertheless, the features described below work the same way in every Workspaces portal.

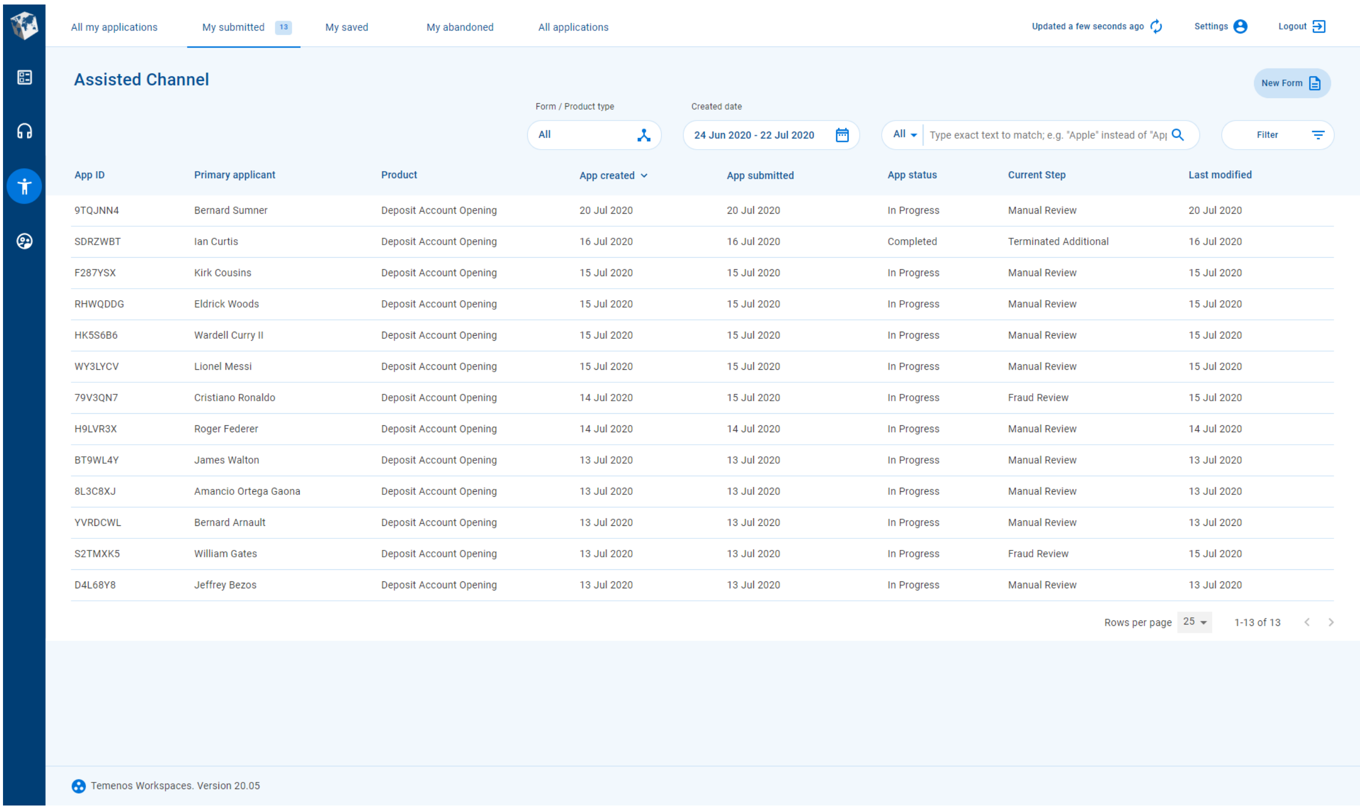
Customer service needs, such as for relationship management, are supported in Workspaces via the inclusion of an Assisted Channel space. In its default configuration, the Assisted Channel space includes a List page and a Details page that are configured with features designed to make relationship management activities fast and efficient, so that you can focus on providing a great customer experience.

List Page

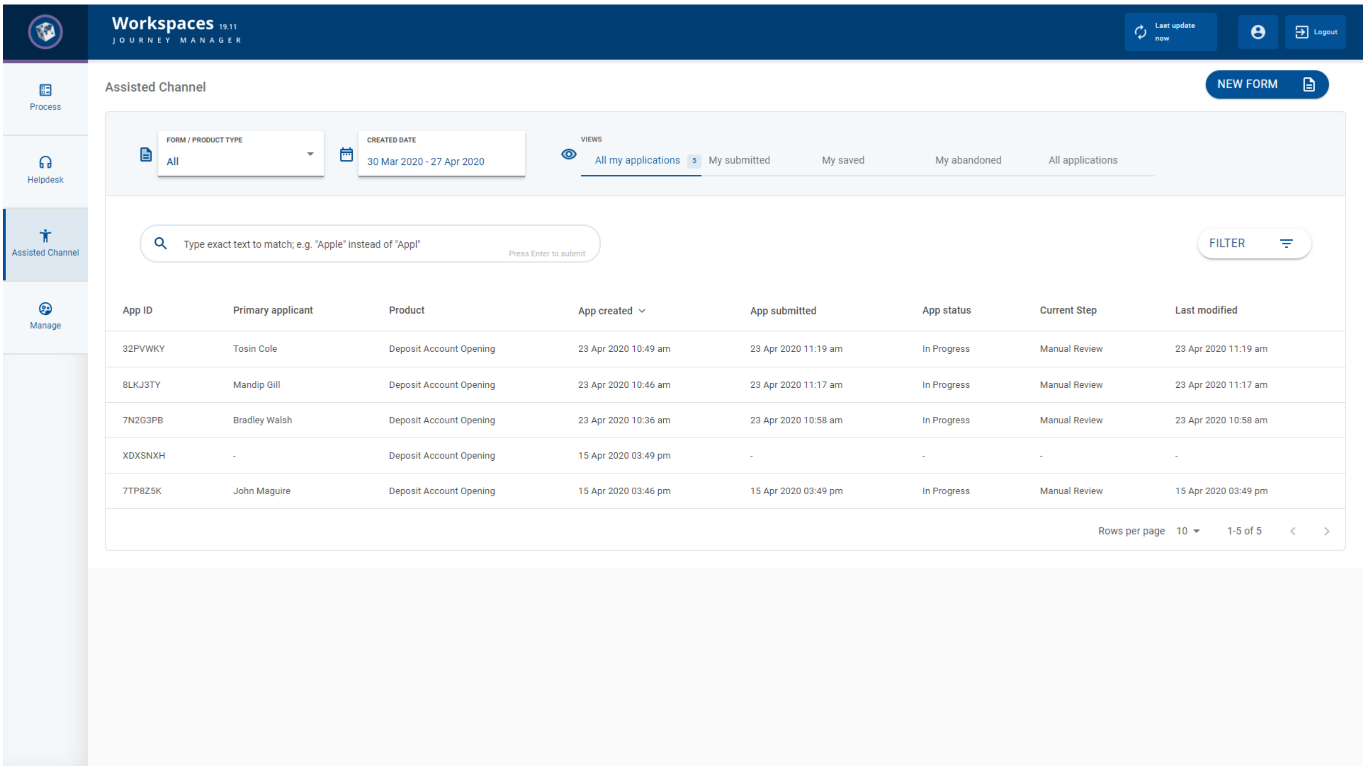
The List page in the Assisted Channel space includes all of the standard features of a Workspaces List page.

- An item list, containing a list of applications, which may be empty initially depending upon how it is populated.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11
- A global filter that restricts the applications in the item list to just those for a selected form / product type.
- A second global filter, Created Date, that restricts the applications in the item list based on the date they were created.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- Flexible search, filter and sort options that you can use to refine the set of applications in the item list.
- Paging tools that you can use to browse the item list.

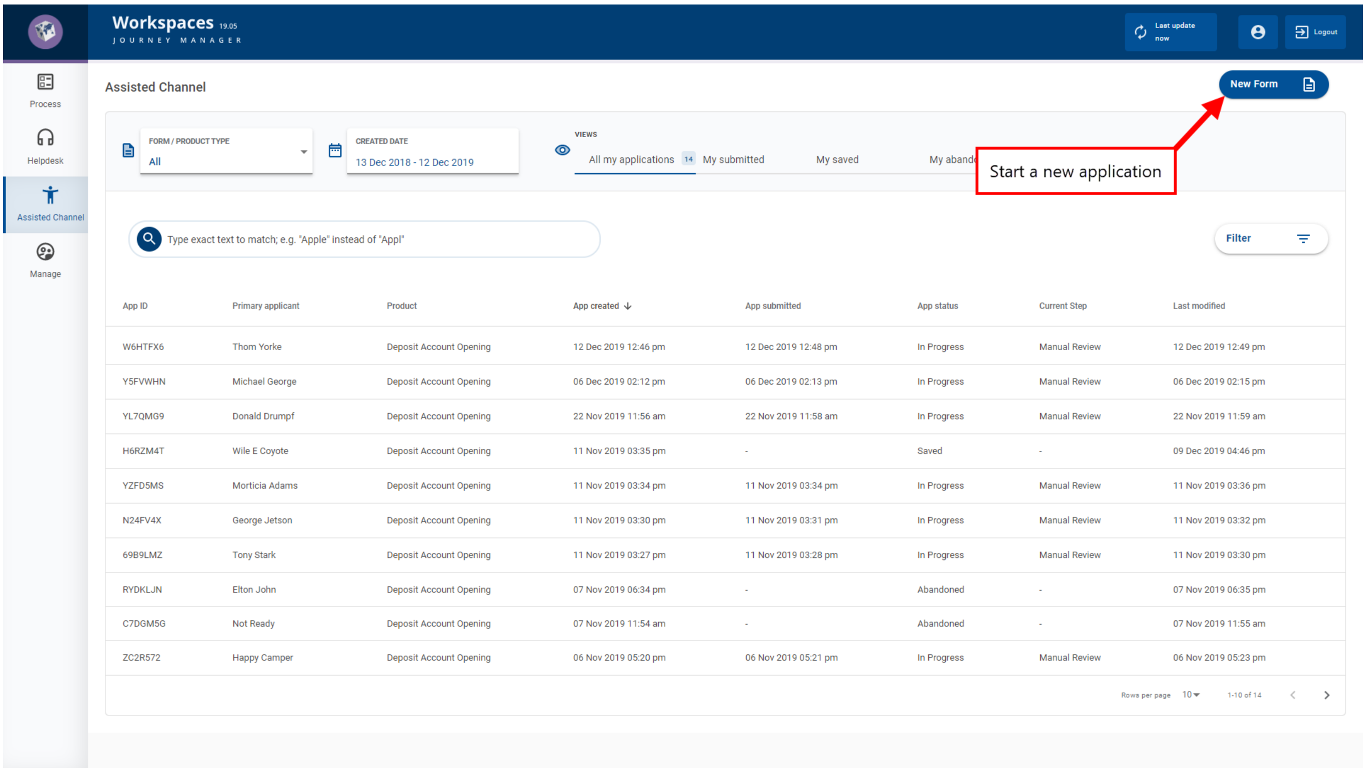
v20.05 v19.11 v19.05 and earlier



All my applications
My submitted 13
My saved
My abandoned
All applications
Updated a few seconds ago
Settings
Logout
Assisted Channel
New Form
Form / Product type
All
Created date
24 Jun 2020 - 22 Jul 2020
All
Type exact text to match; e.g. "Apple" instead of "Ap|
Filter
App ID
Primary applicant
Product
App created
App submitted
App status
Current Step
Last modified
9TQJNN4 Bernard Sumner Deposit Account Opening 20 Jul 2020 20 Jul 2020 In Progress Manual Review 20 Jul 2020
SDRZWBT Ian Curtis Deposit Account Opening 16 Jul 2020 16 Jul 2020 Completed Terminated Additional 16 Jul 2020
F287YSX Kirk Cousins Deposit Account Opening 15 Jul 2020 15 Jul 2020 In Progress Manual Review 15 Jul 2020
RHWQDDG Eldrick Woods Deposit Account Opening 15 Jul 2020 15 Jul 2020 In Progress Manual Review 15 Jul 2020
HK5S6B6 Wardell Curry II Deposit Account Opening 15 Jul 2020 15 Jul 2020 In Progress Manual Review 15 Jul 2020
WY3LYCV Lionel Messi Deposit Account Opening 15 Jul 2020 15 Jul 2020 In Progress Manual Review 15 Jul 2020
79V3QN7 Cristiano Ronaldo Deposit Account Opening 14 Jul 2020 15 Jul 2020 In Progress Fraud Review 15 Jul 2020
H9LVR3X Roger Federer Deposit Account Opening 14 Jul 2020 14 Jul 2020 In Progress Manual Review 14 Jul 2020
BT9WL4Y James Walton Deposit Account Opening 13 Jul 2020 13 Jul 2020 In Progress Manual Review 13 Jul 2020
8L3C8XJ Amancio Ortega Gaona Deposit Account Opening 13 Jul 2020 13 Jul 2020 In Progress Manual Review 13 Jul 2020
YVRDCWL Bernard Arnault Deposit Account Opening 13 Jul 2020 13 Jul 2020 In Progress Manual Review 13 Jul 2020
S2TMXK5 William Gates Deposit Account Opening 13 Jul 2020 13 Jul 2020 In Progress Fraud Review 15 Jul 2020
D4L68Y8 Jeffrey Bezos Deposit Account Opening 13 Jul 2020 13 Jul 2020 In Progress Manual Review 13 Jul 2020
Rows per page 25
1-13 of 13
Temenos Workspaces. Version 20.05



Workspaces 19.11
JOURNEY MANAGER
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Assisted Channel
NEW FORM
FORM / PRODUCT TYPE
All
CREATED DATE
30 Mar 2020 - 27 Apr 2020
VIEWS
All my applications 5
My submitted
My saved
My abandoned
All applications
Type exact text to match; e.g. "Apple" instead of "Appl"
Press Enter to submit
FILTER
App ID
Primary applicant
Product
App created
App submitted
App status
Current Step
Last modified
32PVWKY Tosin Cole Deposit Account Opening 23 Apr 2020 10:49 am 23 Apr 2020 11:19 am In Progress Manual Review 23 Apr 2020 11:19 am
8LKJ3TY Mandip Gill Deposit Account Opening 23 Apr 2020 10:46 am 23 Apr 2020 11:17 am In Progress Manual Review 23 Apr 2020 11:17 am
7N2G3PB Bradley Walsh Deposit Account Opening 23 Apr 2020 10:36 am 23 Apr 2020 10:58 am In Progress Manual Review 23 Apr 2020 10:58 am
XDXSNXH - Deposit Account Opening 15 Apr 2020 03:49 pm - - - -
7TP8Z5K John Maguire Deposit Account Opening 15 Apr 2020 03:46 pm 15 Apr 2020 03:49 pm In Progress Manual Review 15 Apr 2020 03:49 pm
Rows per page 10
1-5 of 5



The Assisted Channel space's List page displays a list of applications that you created or that have tasks assigned to you, taking into consideration the global filters, the current view and any active search, filter and sort options. The **Form / Product Type** selector shows which form / product types the applications in the list relate to, and the name of the current view is highlighted in the **Views** selector. The list of applications displayed can be further refined using the filter and sort options. Filtering restricts which applications are displayed in the list, and sorting determines the order that items appear in the list. To learn more about these options, see Filter the Item List and Sort the Item List.

Once you've found the application you're interested in, you can select it in the item list to perform an action on it. In addition to these actions, you can also start a new application on behalf of a customer. To learn about the available actions, see Assisted Channel Actions below.

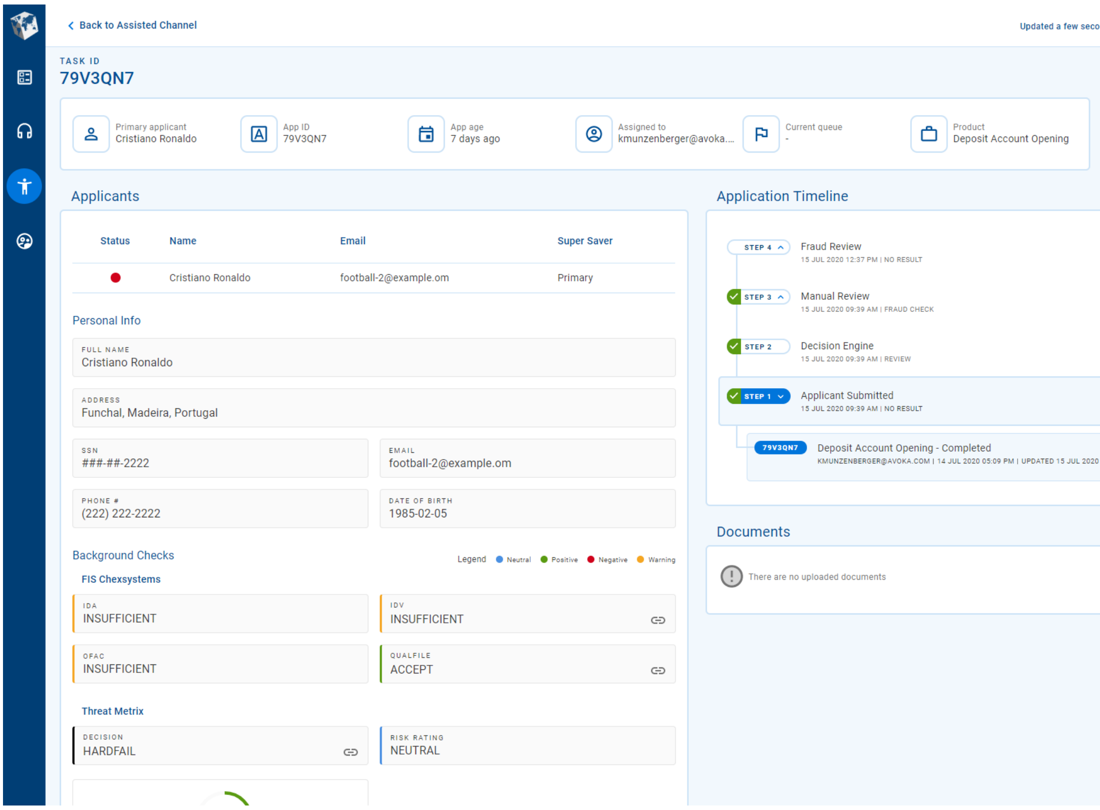
Details Page

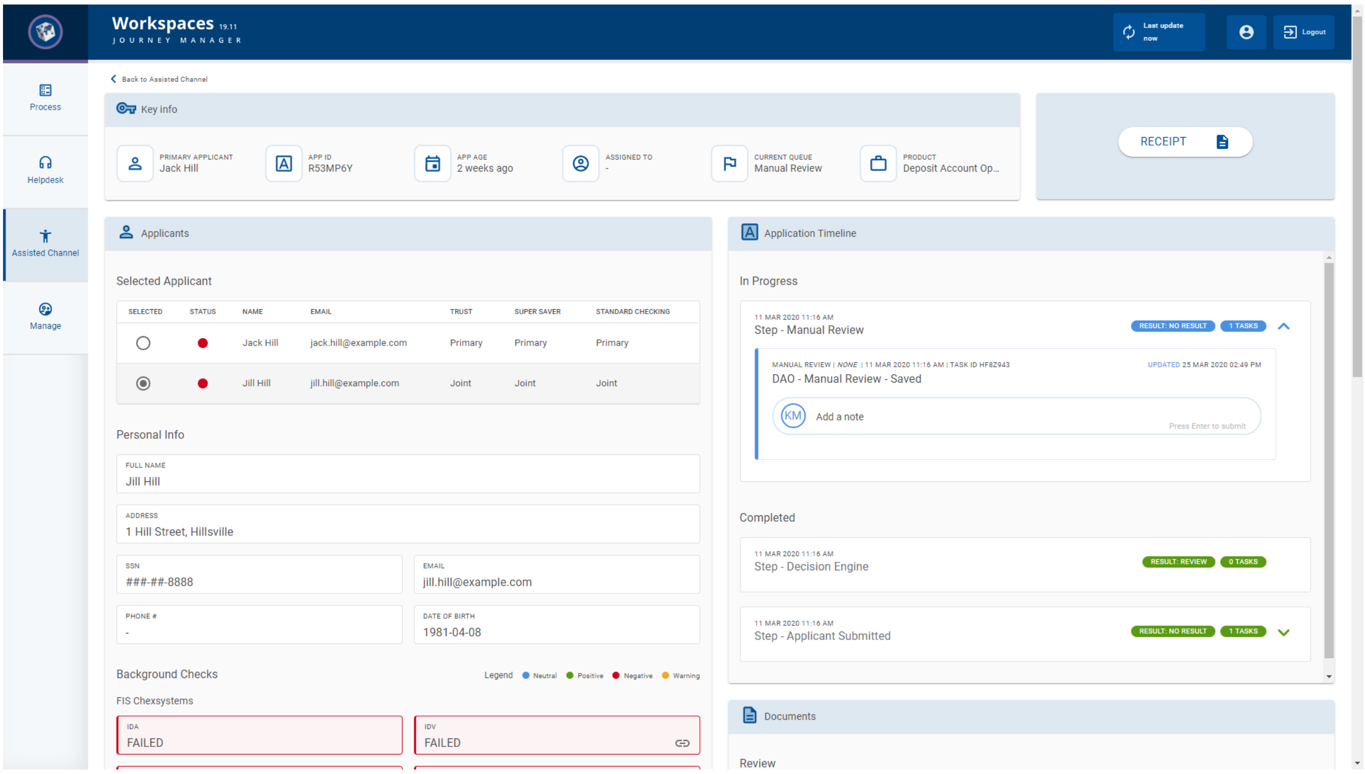
The Details screen in the Assisted Channel space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected application and its tasks, and provides access to the Assisted Channel actions. This includes the following features, each of which is contained in a separate card or card section:

- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. | 19.11
- A set of standard actions that you can perform in the Assisted Channel space at the current stage of the application's life cycle. | 20.05
- A list of applicants and products from which you can select an applicant to view more details. | 19.11
- Personal information for the selected applicant, including identity and contact details. | 19.11
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability. | 19.11
- A feature-rich application timeline of all the steps that the application has progressed through, showing key application details as well as tasks with accompanying notes. | 20.05
- Timeline task items that show the application's progress; select one to reload the Details screen and present the application in the context of the selected task. | 20.05
- A dynamic set of actions that are applicable to the selected timeline task and currently available for you to perform, thereby giving you confidence that you're acting on the right task. | 20.05
- Attached relating to the application. | 19.11
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

To learn about these standard features, click the links above or see The Application Details Screen.

v20.05 v19.11 and earlier





Assisted Channel Actions

The assisted channel actions are:

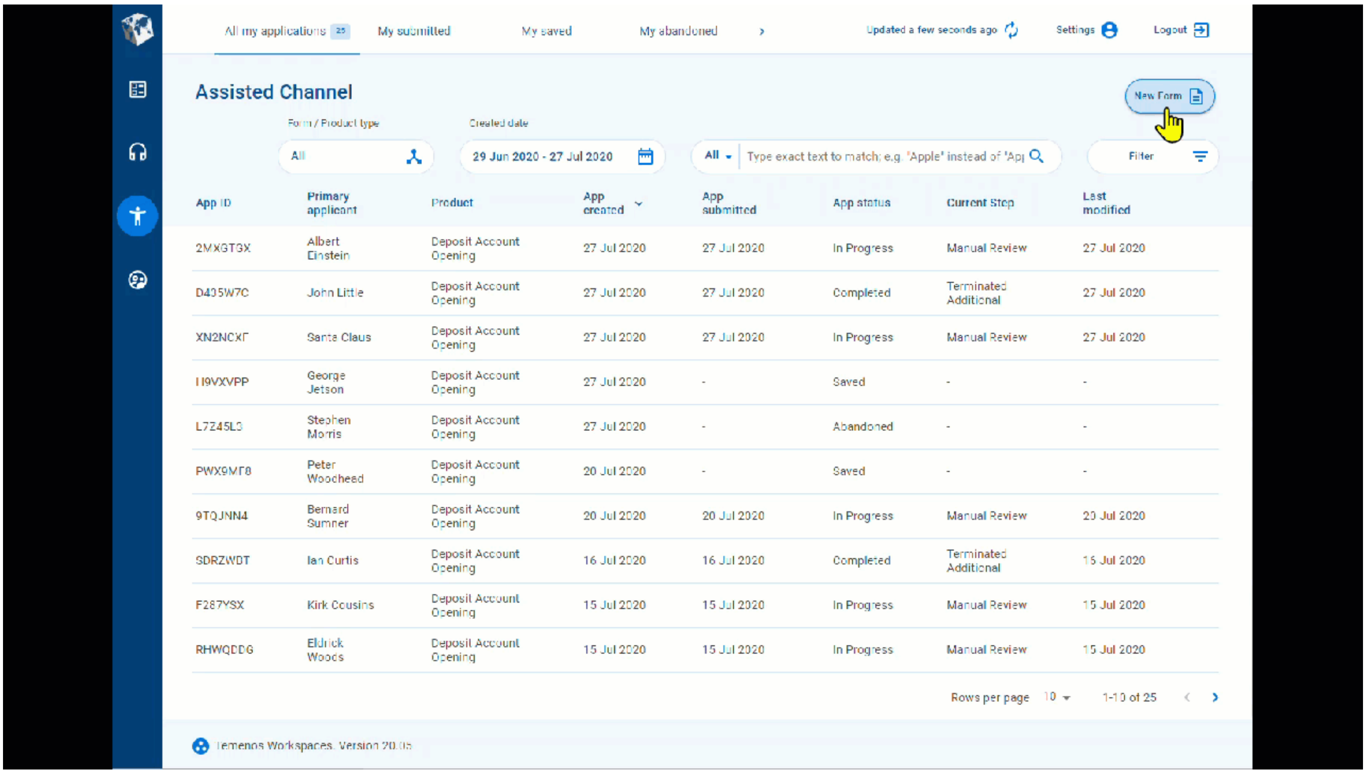
- New Form – Start a new application on behalf of someone else.
- Recover – Recover an abandoned or withdrawn application so that the applicant can continue with it.
- View Form – See a read-only view of an application that has been saved but not yet submitted.
- View Notes – View all of the notes from all of an application's tasks.
- Withdraw – Cancel an application that has been saved but not yet submitted.

The New Form action is described below in the context of the Assisted Channel space. Descriptions of the other actions are available elsewhere in the context of other spaces.

Examples showing how to use all of these actions are available or linked below.

Start an Application (New Form)

In a customer-focused role such as a relationship manager, it helps to be able to provide services to your busy customers that make their lives easier. Workspaces includes several features aimed at reducing friction in the application process. One of these is the New Form action which allows you to kick-start applications on behalf of your customers.



The New Form action allows you to start a new application for a customer and fill in all of the application details that you know, accelerating the application process. You can work with your customer to enter all the necessary details, and then submit the application when it's ready.

> An application started using the New Form or New Application actions can only be accessed by an authenticated user; that is, a user who is logged in to Workspaces (including the Applicant space) or a Journey Platform system. However, many applicants are anonymous or unauthenticated users, starting an application from an external website such as an online banking website, and so will not be able to access an application started using New Form or New Application.
>
> Handover of applications between authenticated and anonymous users is possible but may not be offered in an out of the box Journey Platform solution. So, if application handover is important to you, contact your Journey Platform representative to discuss how your solution can be customized to allow application handover where you need it in your application workflow.

The **New Form** button is available in the top right corner of the Assisted Channel space's List page. When you click **New Form**, a menu appears showing the list of available form / product types. Select a form / product type to display that form and start filling in the application. When you're finished filling in details you can save the application so that you can continue it later. For details about how to continue an application, see View a Form.

Applications you start in this way appear in your item list in the Assisted Channel space. This makes it easy for you to find an application to continue entering details, and then to monitor progress of the application's tasks once it has been submitted. While the application is yet to be submitted, the application's status is **Saved** and the submitted date is blank. Once the application has been submitted, the View Form action is no longer available and you can make no further changes to the application.

Assisted Channel Action Examples

Let's go step by step through some examples to demonstrate how you can use the assisted channel actions to provide better customer service.

You can find examples below for the following actions:

- Start an application on the List page

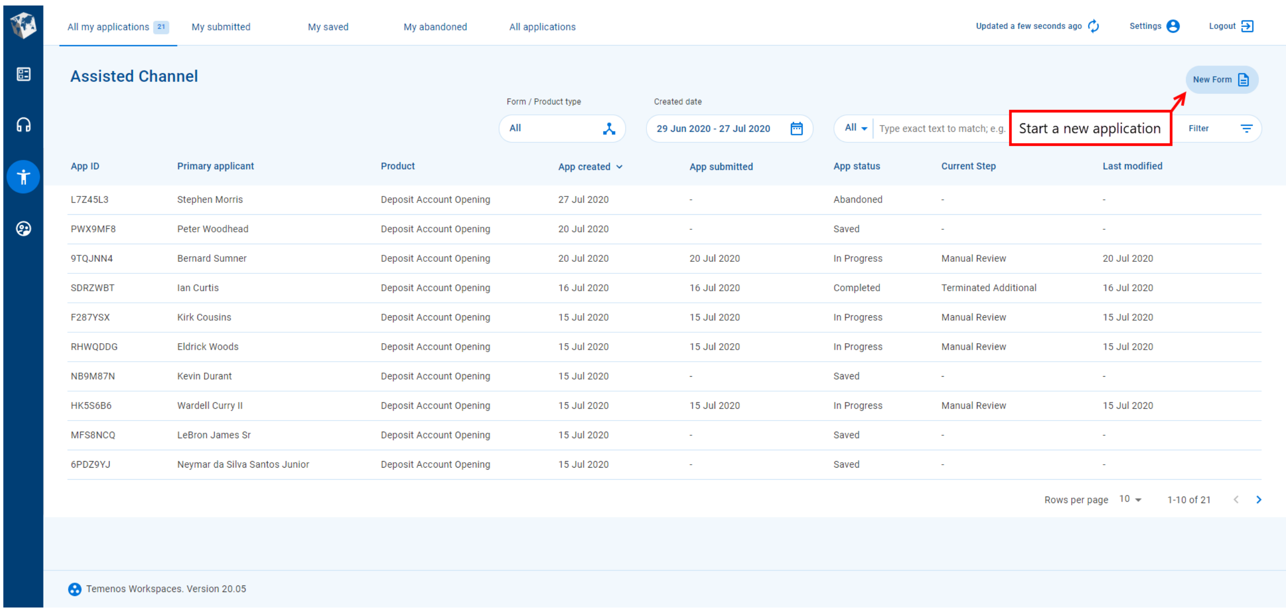
Step-by-step examples are available elsewhere for other actions you may need while assisting customers with applications:

- View a receipt on the Details page
- View a saved form on the List page
- Upload a document on the Details page
- Recover an abandoned application on the List page
- Withdraw an unsubmitted application on the Details page

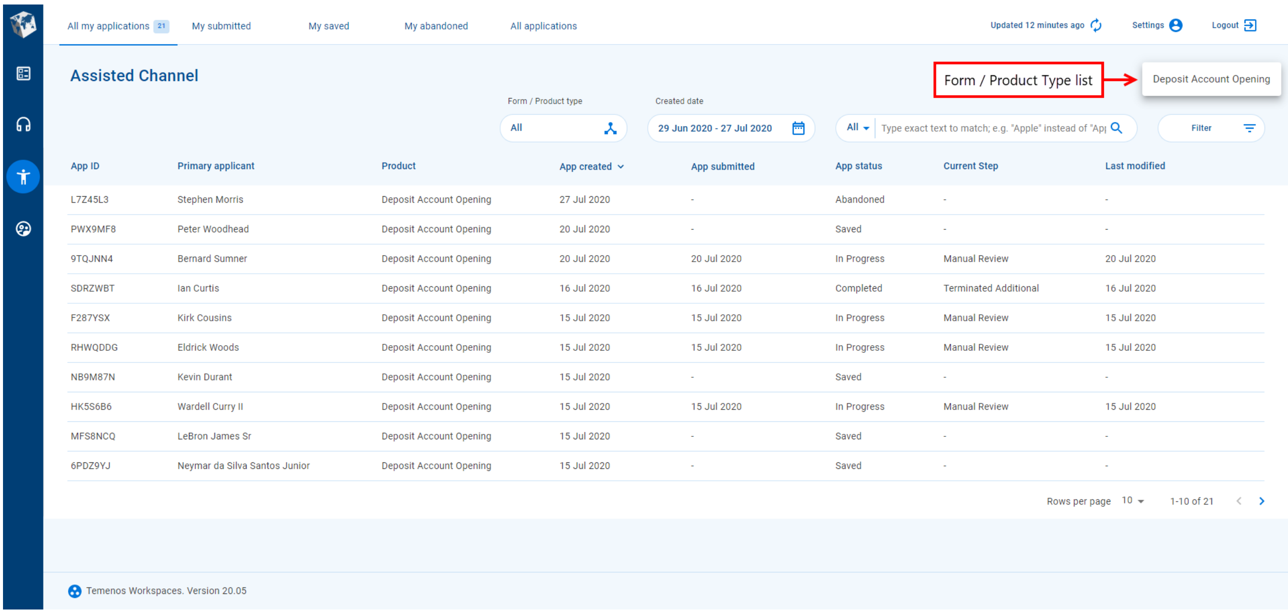
Start an Application

This example shows you how to kick-start an application on the List page. In this example, we know some customer details which are entered before saving and closing the application.

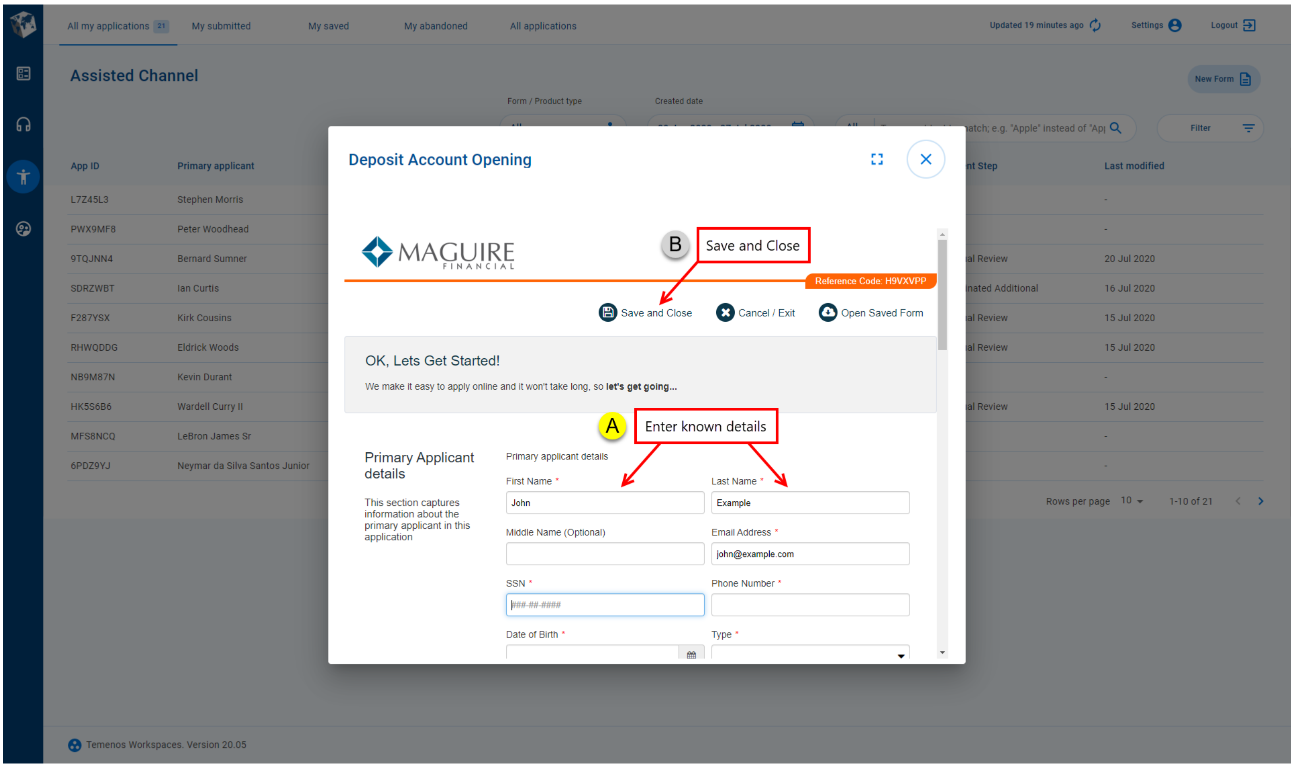
1. Login to Workspaces and select the **Assisted Channel** space. The List page is displayed.



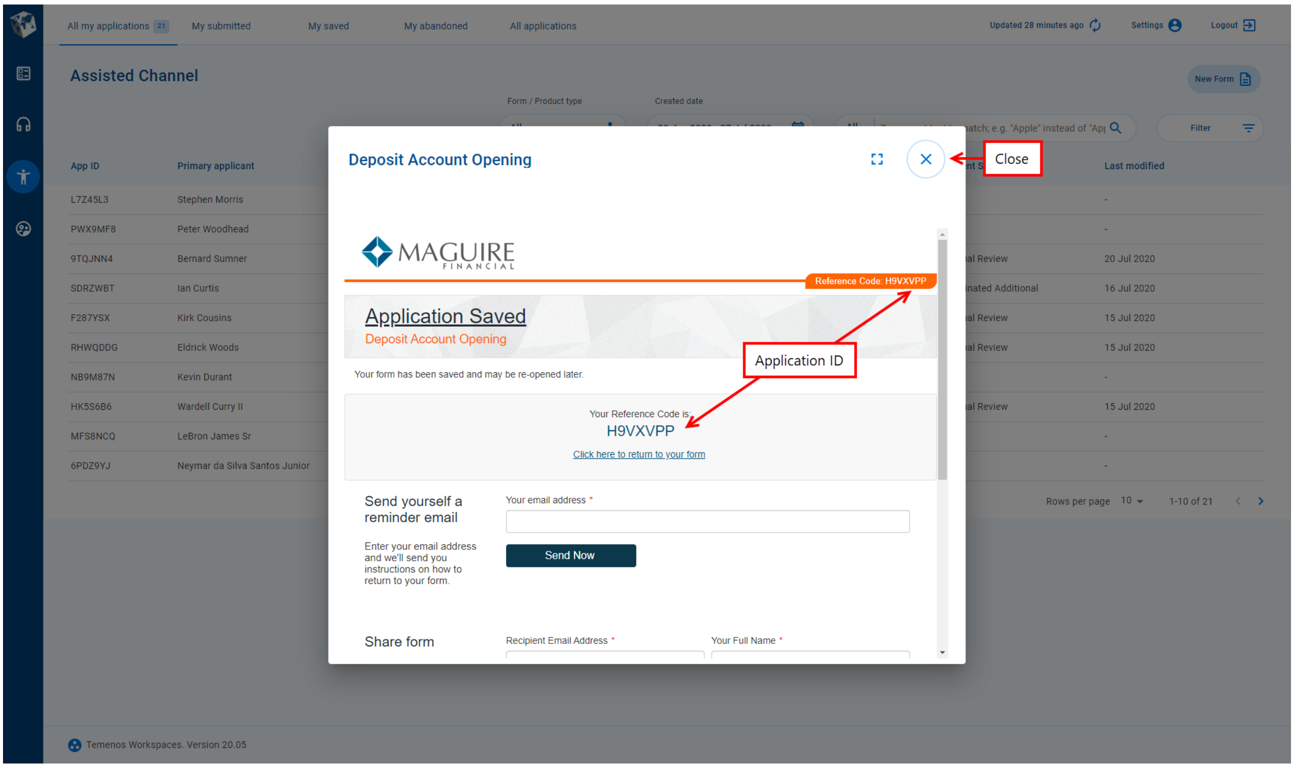
2. Click **New Form**, then select an item from the form / product type list. In this example, there's only a single form / product type, Deposit Account Opening, so we'll select this item.



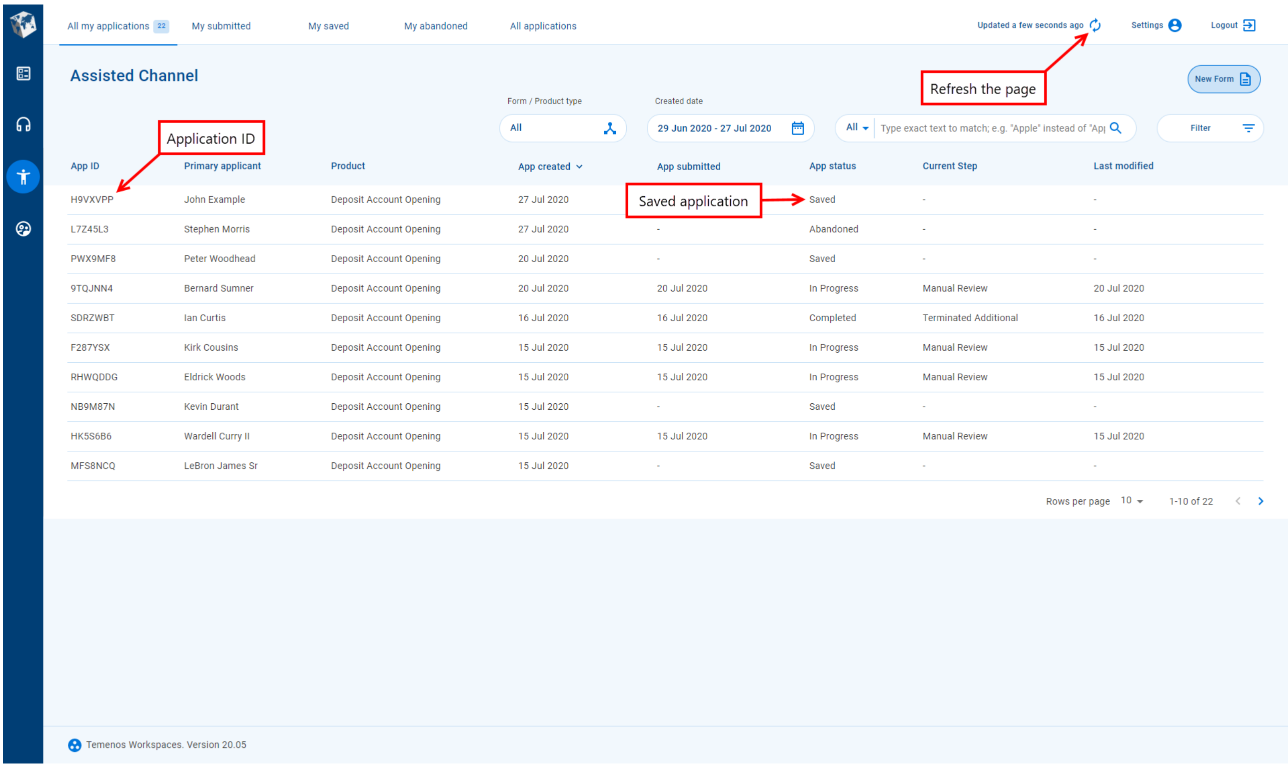
3. A window opens containing the new form. Enter the known customer details, name and email address, then click **Save and Close**.



4. The application ID, "H9VXVPP", is displayed; Click (Close) to close the form and return to the List page.



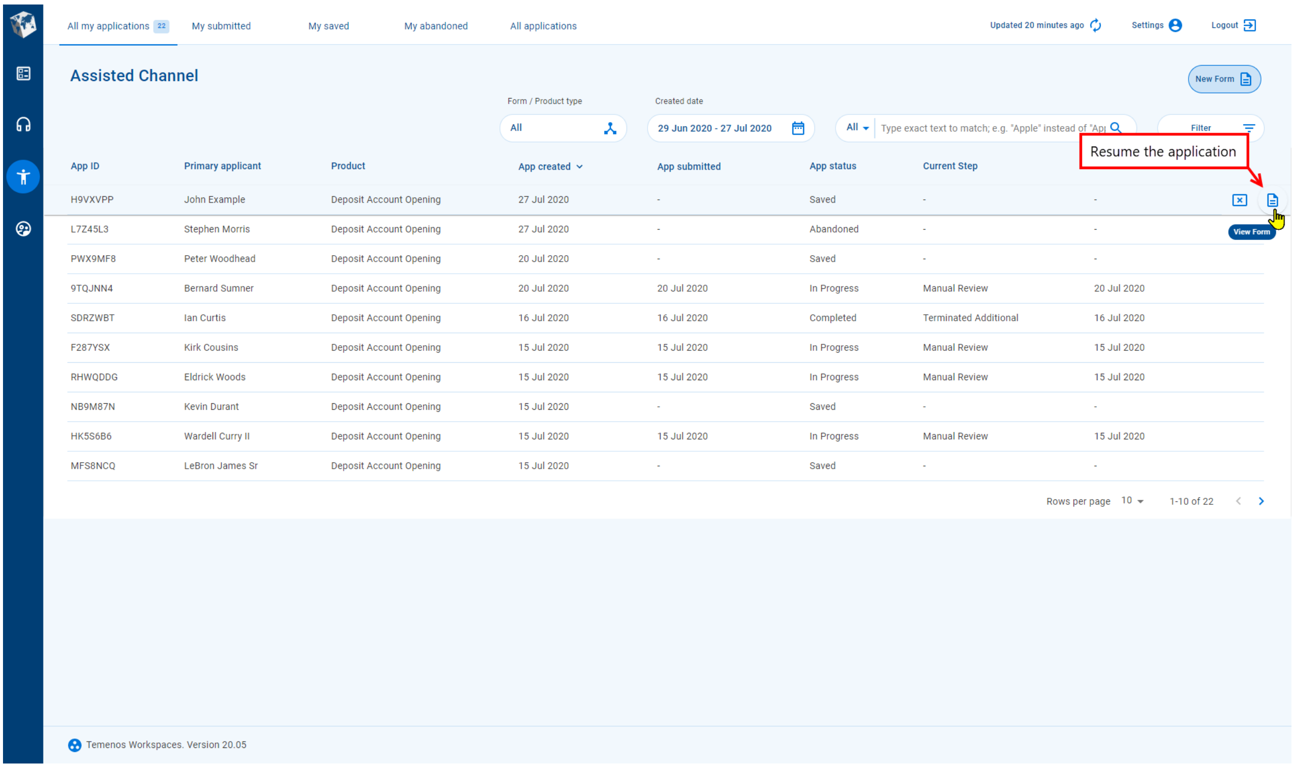
5. The new application, with application ID "PFFP7NZ", appears at the top of the list, and its status is Saved. If you can't see the new application, click (Refresh) to refresh the information shown on the page.



Once the application has been saved, anyone assigned to the task can use the View Form action to resume the application later. Also, if the customer has received a save confirmation email, this will include a link they can click to resume the application.

To resume the application using the View Form action:

1. Locate the saved application. It's at the top of the list, but if it wasn't we could search for our application ID to find the task. In the (Search) box, type our App ID "PFFP7NZ", and just one task is found.
2. Point your cursor at the item list item for our saved application – the available actions appear at the right-hand side.
3. Click (View Form) to re-open the form and continue filling in the application.



4. When you're done, click **Save and Close** again, or **Submit** if you're ready to submit the application.

Manage Applications in Workspaces

Workspaces | Workspaces User | 19.05 | 19.11

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If you manage a team, you may need to schedule work to meet various needs; for example, to share work across your team, to accommodate team member absences, or to satisfy an **SLA**[1]. A user with access to the Manage space, such as a manager or a Workspaces administrator, can change task assignments to address any such needs.

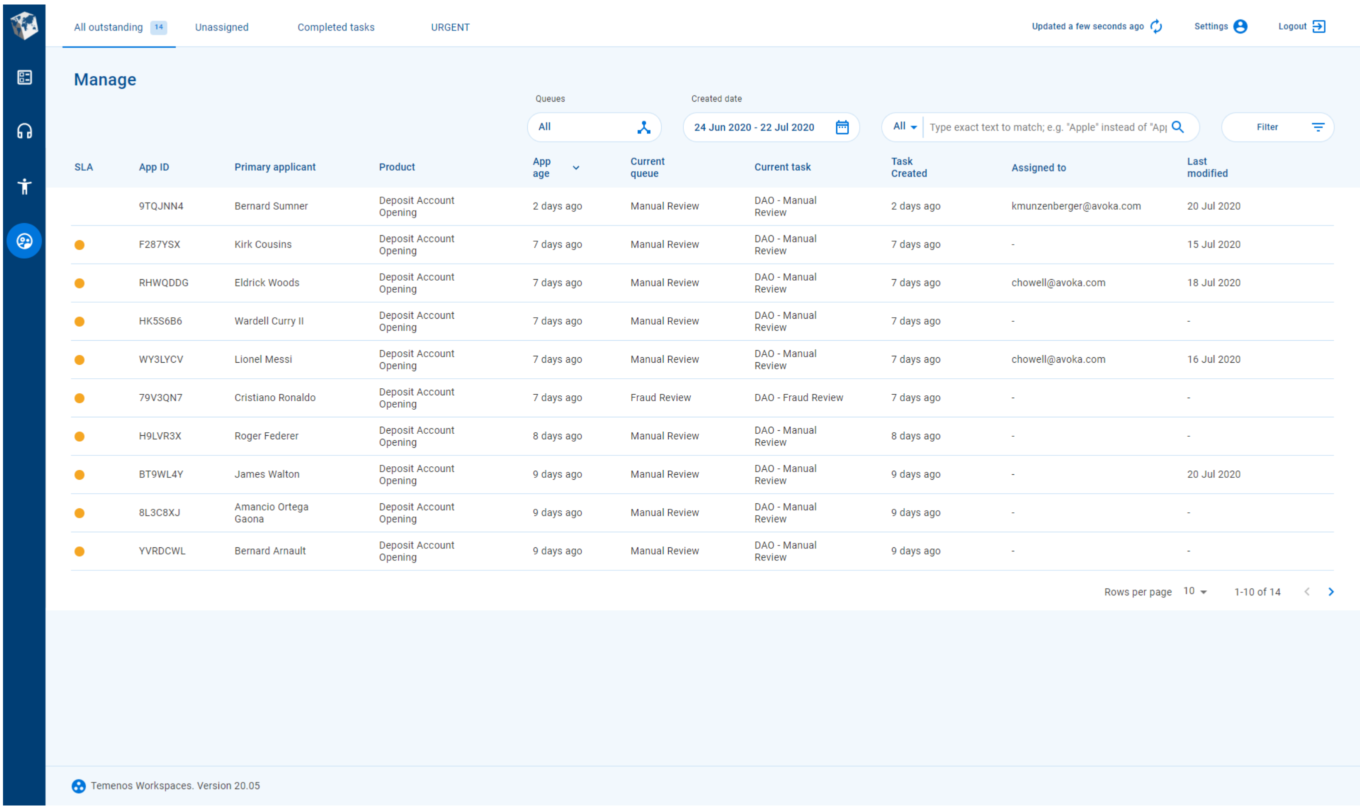
List Page

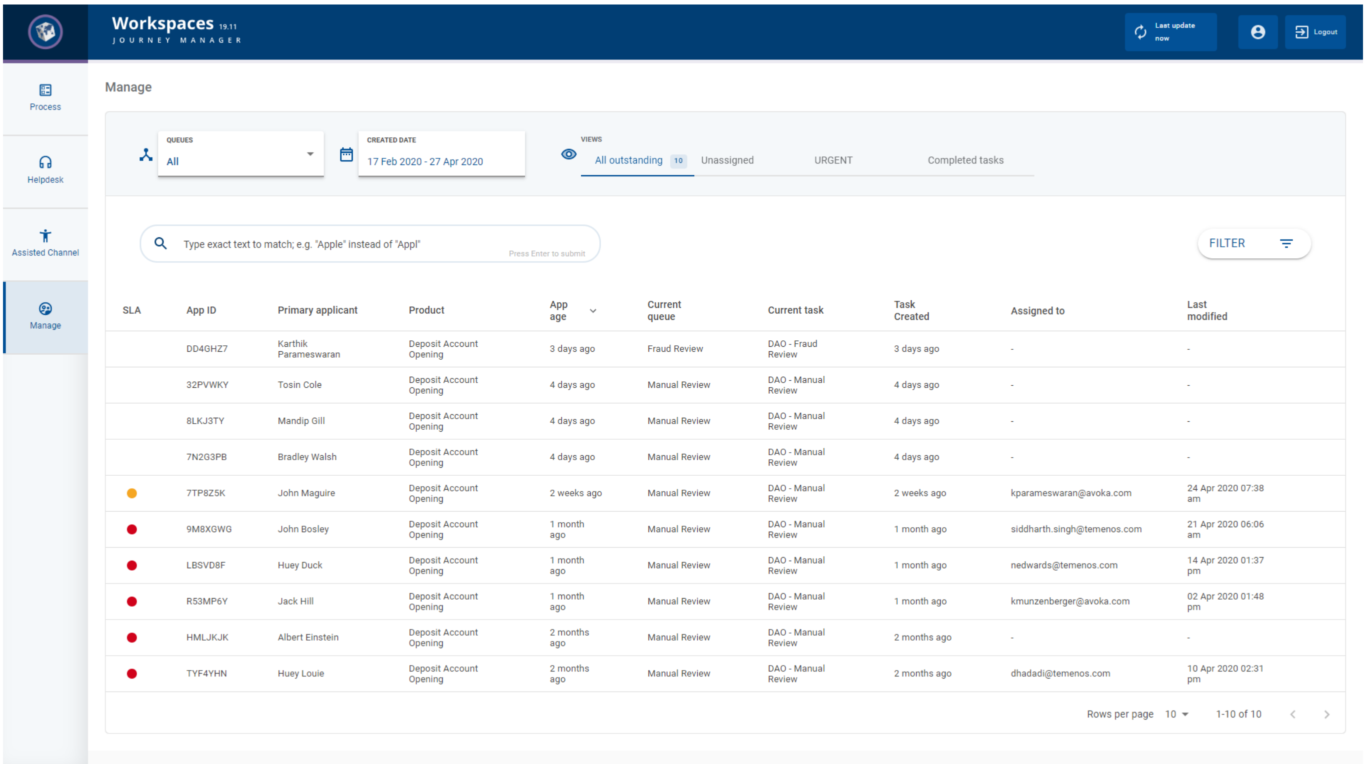
The List page in the Manage space includes all of the standard features of a Workspaces List page.

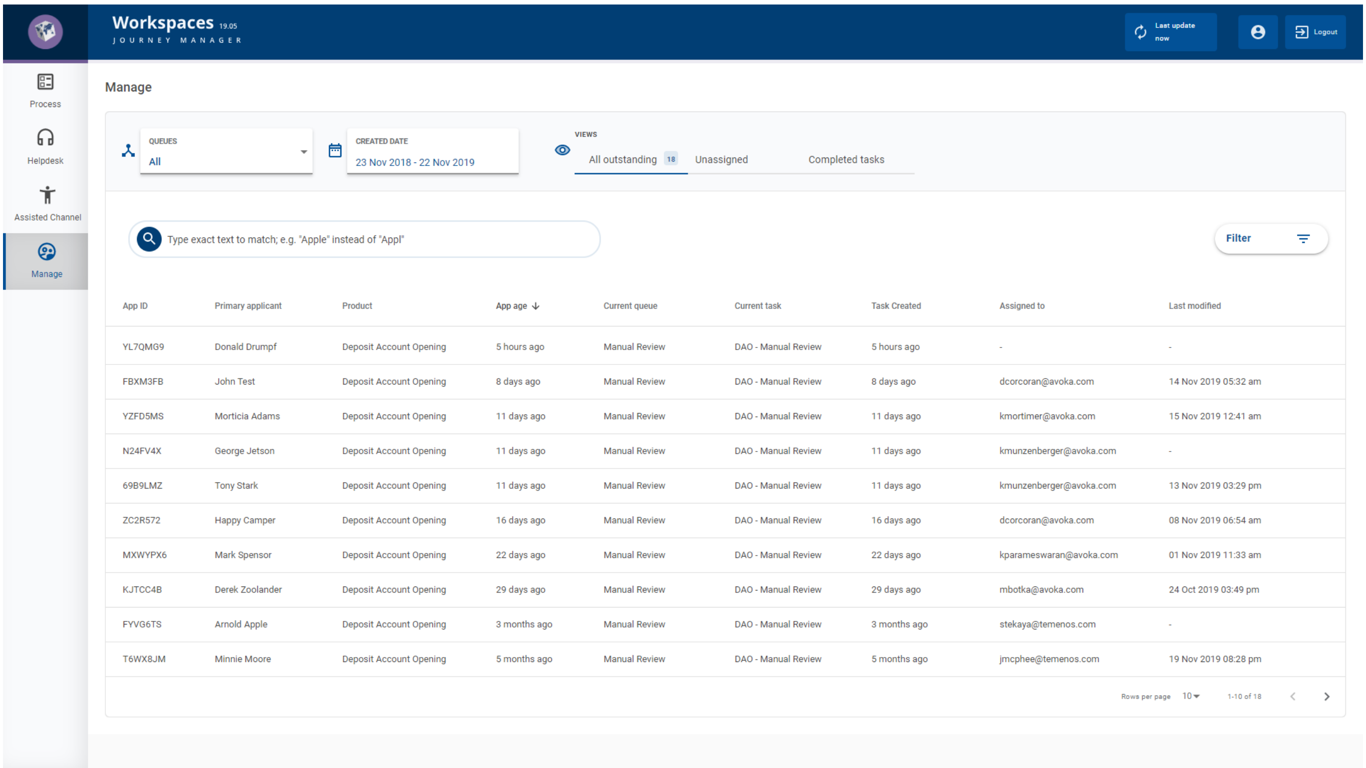
- An item list populated with tasks sourced from the active queue.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11
- A second global filter, Created Date, that restricts the tasks in the item list based on the date they were created.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.
- Paging tools that you can use to browse the item list.

v20.05 v19.11 v19.05 and earlier

[1] A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.


All outstanding 14
Unassigned
Completed tasks
URGENT
Updated a few seconds ago
Settings
Logout
Manage
Queues
All
Created date
24 Jun 2020 - 22 Jul 2020
All
Type exact text to match; e.g. "Apple" instead of "Ap
Filter
SLA App ID Primary applicant Product App age Current queue Current task Task Created Assigned to Last modified
9TQJNN4 Bernard Sumner Deposit Account Opening 2 days ago Manual Review DAO - Manual Review 2 days ago kmunzenberger@avoka.com 20 Jul 2020
F287YSX Kirk Cousins Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago - 15 Jul 2020
RHWQDDG Eldrick Woods Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago chowell@avoka.com 18 Jul 2020
HK5S6B6 Wardell Curry II Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago - -
WY3LYCV Lionel Messi Deposit Account Opening 7 days ago Manual Review DAO - Manual Review 7 days ago chowell@avoka.com 16 Jul 2020
79V3QN7 Cristiano Ronaldo Deposit Account Opening 7 days ago Fraud Review DAO - Fraud Review 7 days ago - -
H9LVR3X Roger Federer Deposit Account Opening 8 days ago Manual Review DAO - Manual Review 8 days ago - -
BT9WL4Y James Walton Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - 20 Jul 2020
8L3C8XJ Amancio Ortega Gaona Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - -
YVRDCWL Bernard Arnault Deposit Account Opening 9 days ago Manual Review DAO - Manual Review 9 days ago - -
Rows per page 10 1-10 of 14
Temenos Workspaces. Version 20.05


Workspaces 19.11
JOURNEY MANAGER
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Manage
QUEUES
All
CREATED DATE
17 Feb 2020 - 27 Apr 2020
VIEWS
All outstanding 10
Unassigned
URGENT
Completed tasks
Type exact text to match; e.g. "Apple" instead of "Appl"
Press Enter to submit
FILTER
SLA App ID Primary applicant Product App age Current queue Current task Task Created Assigned to Last modified
DD4GHZ7 Karthik Parameswaran Deposit Account Opening 3 days ago Fraud Review DAO - Fraud Review 3 days ago - -
32PVWKY Tosin Cole Deposit Account Opening 4 days ago Manual Review DAO - Manual Review 4 days ago - -
8LKJ3TY Mandip Gill Deposit Account Opening 4 days ago Manual Review DAO - Manual Review 4 days ago - -
7N2G3PB Bradley Walsh Deposit Account Opening 4 days ago Manual Review DAO - Manual Review 4 days ago - -
7TP8Z5K John Maguire Deposit Account Opening 2 weeks ago Manual Review DAO - Manual Review 2 weeks ago kparameswaran@avoka.com 24 Apr 2020 07:38 am
9M8XGWG John Bosley Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago siddharth.singh@temenos.com 21 Apr 2020 06:06 am
LBSVD8F Huey Duck Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago nedwards@temenos.com 14 Apr 2020 01:37 pm
R53MP6Y Jack Hill Deposit Account Opening 1 month ago Manual Review DAO - Manual Review 1 month ago kmunzenberger@avoka.com 02 Apr 2020 01:48 pm
HMLJKJK Albert Einstein Deposit Account Opening 2 months ago Manual Review DAO - Manual Review 2 months ago - -
TYF4YHN Huey Louie Deposit Account Opening 2 months ago Manual Review DAO - Manual Review 2 months ago dhadadi@temenos.com 10 Apr 2020 02:31 pm
Rows per page 10 1-10 of 10



The Manage space's List page displays a list of tasks from the selected queue, taking into consideration the current view and any active search, filter and sort options. Each row in the item list corresponds to a single task, showing a set of pre-configured data items in columns including an SLA indicator that identifies how application processing is progressing against the SLA conditions. The name of the active queue is displayed in the **Queue** selector, and the name of the current view is highlighted in the **View** selector. The list of tasks displayed can be further refined using the filter and sort options. Filtering restricts which tasks are displayed in the list, and sorting determines the order that tasks appear in the list. To learn more about these options, see Filter the Item List and Sort the Item List.

Once you've found the task you're interested in, you can select it in the item list to perform an action on it. To learn about the available actions, see Manage Actions below.

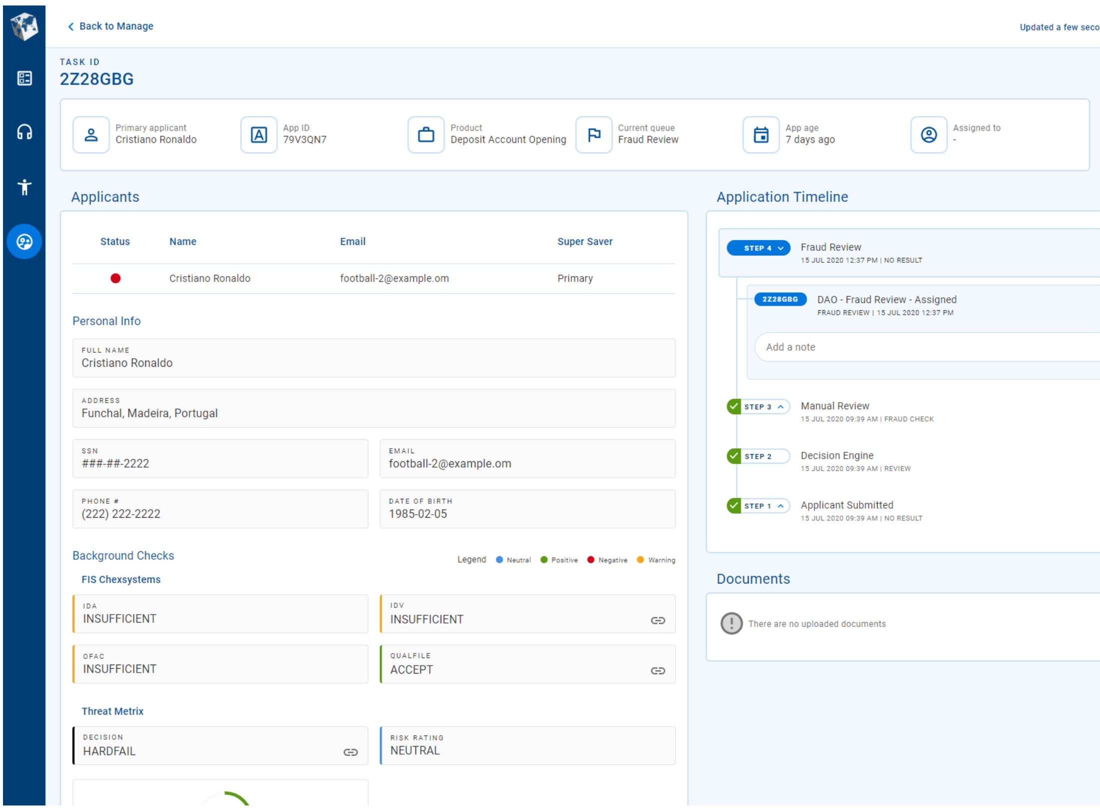
Details Page

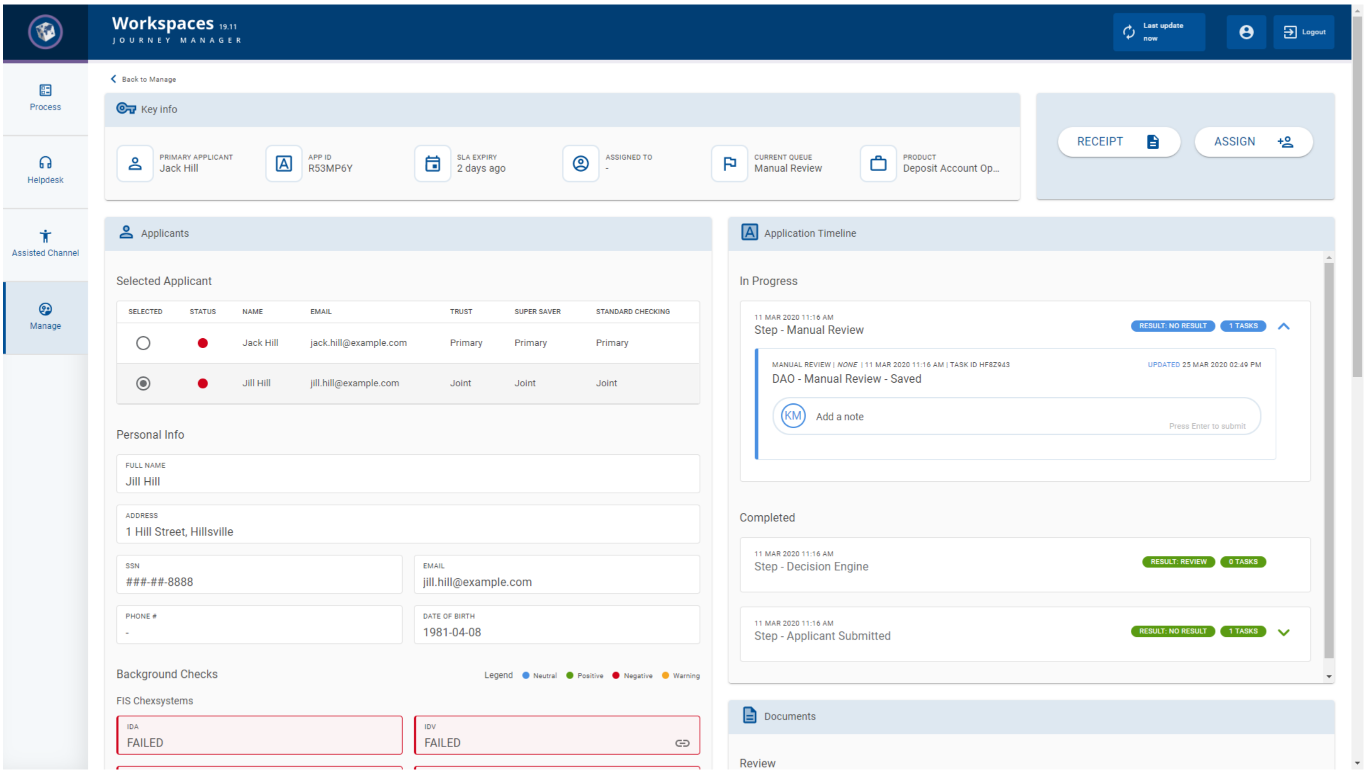
The Details screen in the Manage space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected application and its tasks, and provides access to actions for managing applications. This includes the following features, each of which is contained in a separate card or card section:

- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. | 19.11
- A set of standard actions that you can perform in the Manage space at the current stage of the application's life cycle. | 20.05
- A list of applicants and products from which you can select an applicant to view more details. | 19.11
- Personal information for the selected applicant, including identity and contact details. | 19.11
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability. | 19.11
- A feature-rich application timeline of all the steps that the application has progressed through, showing key application details as well as tasks with accompanying notes. | 20.05
- Timeline task items that show the application's progress; select one to reload the Details screen and present the application in the context of the selected task. | 20.05
- A dynamic set of actions that are applicable to the selected timeline task and currently available for you to perform, thereby giving you confidence that you're acting on the right task. | 20.05
- Attached relating to the application. | 19.11
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

To learn about these standard features, click the links above or see The Application Details Screen.

v20.05 v19.11 and earlier





Manage Actions

The manage actions are:

- Assign – Assign a task to a Workspaces user.
- Unassign – Remove a task assignment for any task.
- View Notes – View all of the notes from all of an application's tasks.

The Assign and Unassign actions are described below in the context of the Manage space, including examples of how to use them.

Assign and Unassign Tasks

If you manage a team, you may need to schedule work to meet various needs; for example, to share work across your team, to accommodate team member absences, or to satisfy an SLA[1]. A user with access to the Manage space, such as a manager or a Workspaces administrator, can change task assignments to address any such needs.

When you assign a task to a Workspaces user, only that user can work on it. Once you assign a task to someone, other actions may become available for the assigned user to perform on the task.

[1] A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

If you need to remove a task assignment, you can unassign the task from the current user. For example, if a staff member goes on leave without completing an assigned task and you need to assign it to someone else, you can unassign the task from the current user and assign it to the other user. In this way, you can manage the assignment of tasks to ensure they are completed in a timely fashion.

Manage Action Examples

Let's go step by step through some examples for activities that you may need to perform when managing tasks.

You can find examples below for the following actions:

- Assign a task on the List page
- Unassign a task on the List page

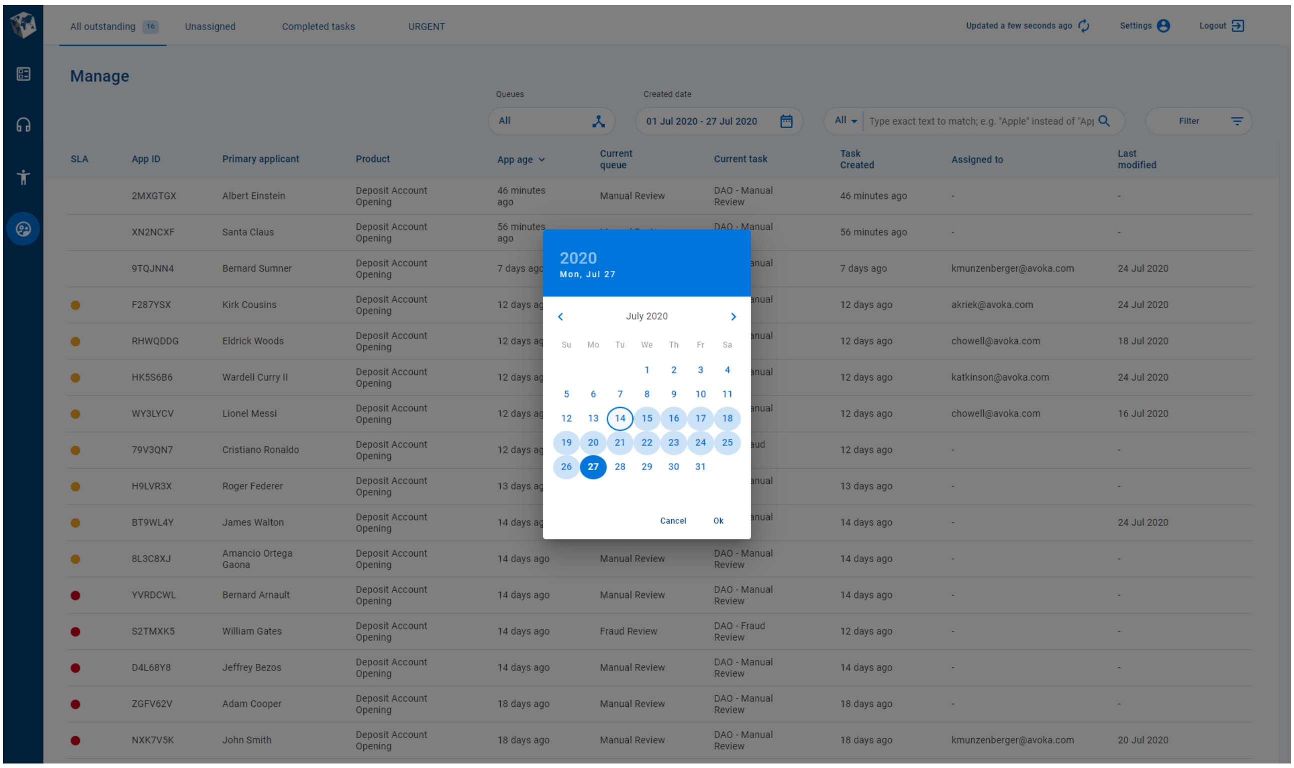
Step-by-step examples are available elsewhere for other actions you may need while managing tasks:

- View a receipt on the Details page
- Upload a document on the Details page

Assign a Task

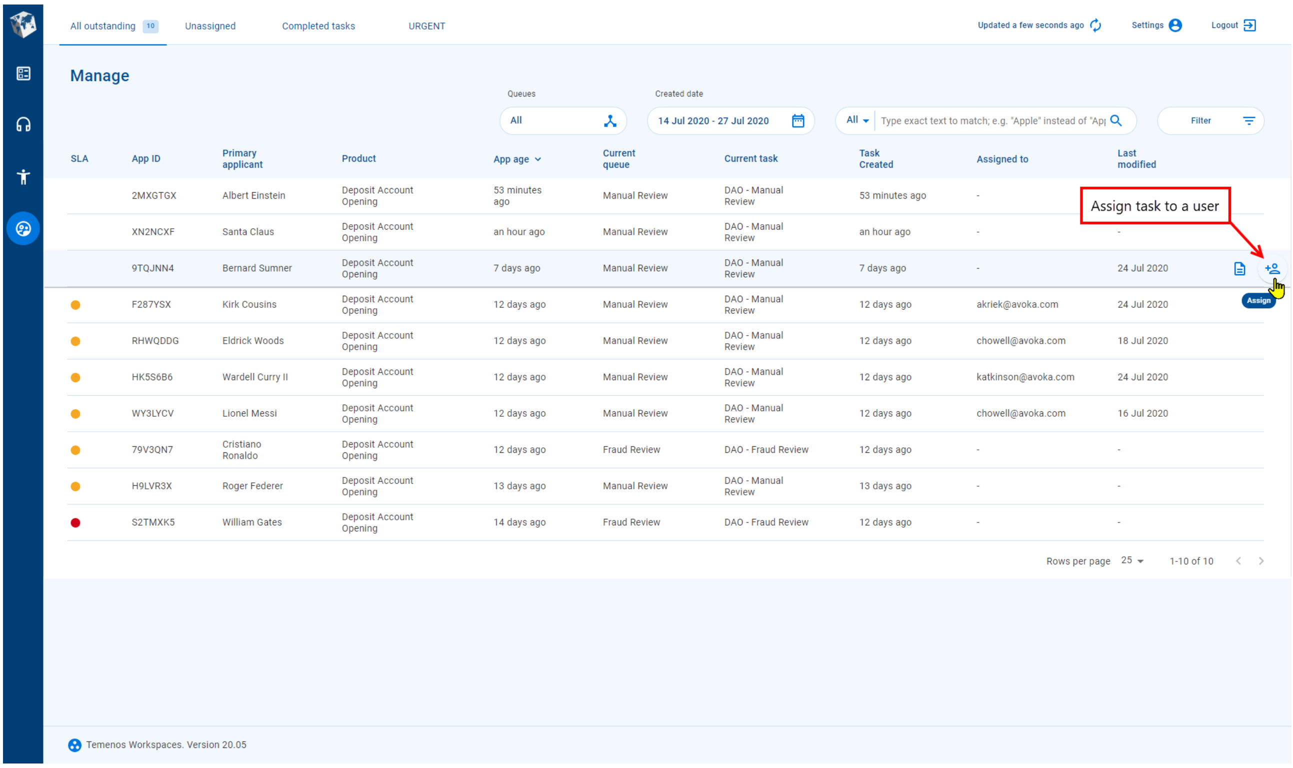
This example shows you how to narrow down the item list to just tasks for recently created applications using global filters, then assign a task to a Workspaces user.

1. Login to Workspaces and select the **Manage** space.
2. Click **Created Date** and select a range of dates that covers recently submitted applications, narrowing down the list of tasks and making it easier to see the task you want to assign.

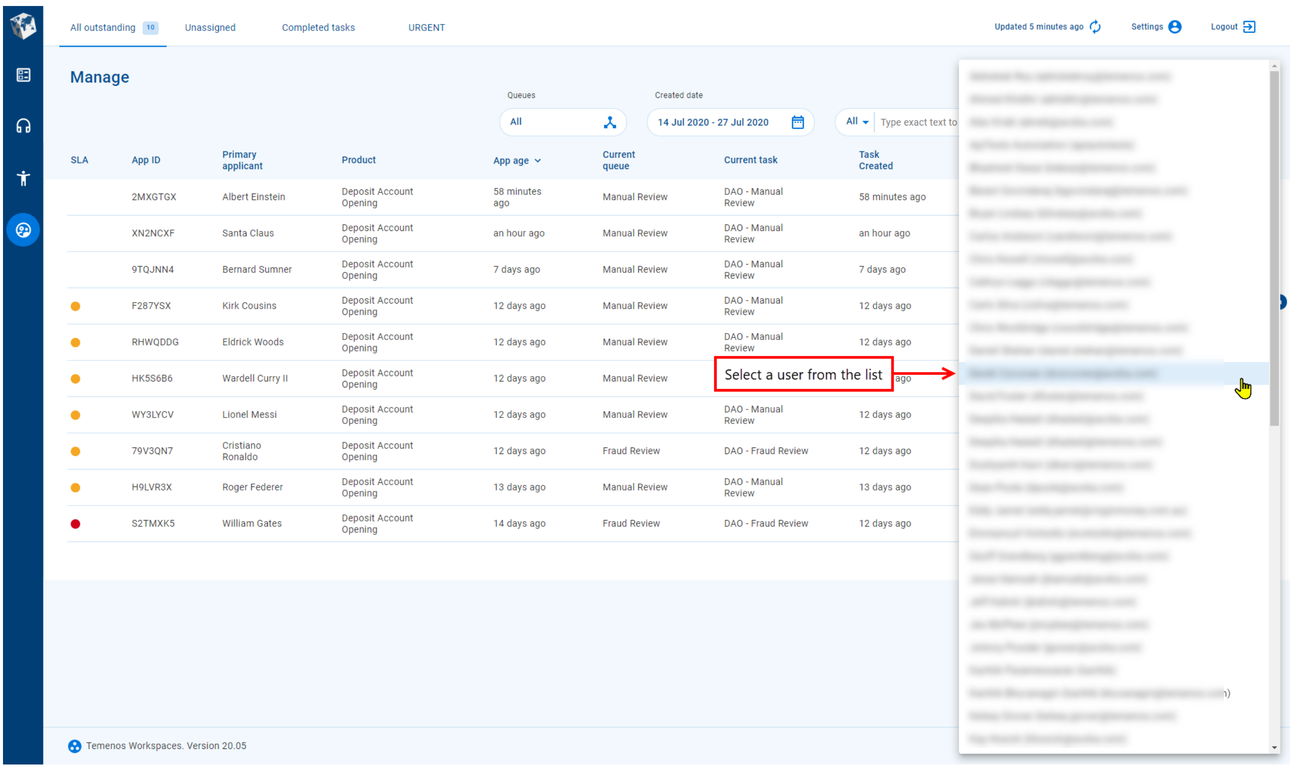


3. Point your cursor at the task that you want to assign – the available actions appear at the right-hand side.

Click (Assign) to display the list of Workspaces users.

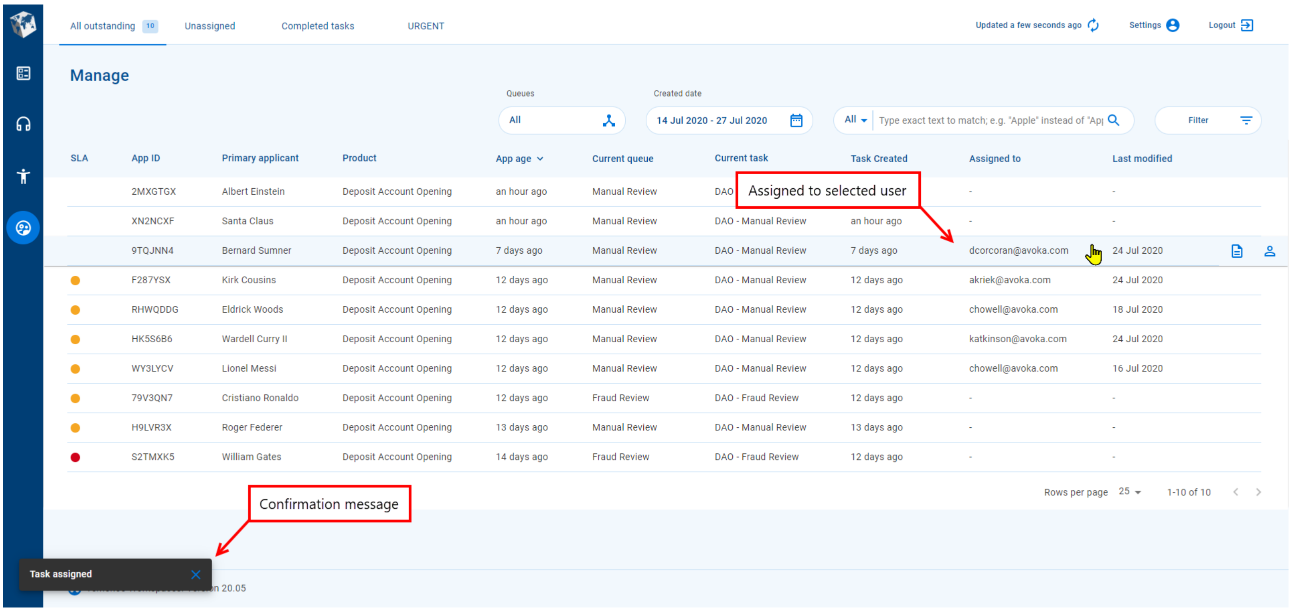


4. Select the user that you want to assign the task to from the list.



The user list displays both the Workspaces user name and the user's full name for each user.

5. The selected user's Workspaces id is displayed in the **Assigned** column, and a message confirming you have assigned the task is displayed briefly in the bottom left corner.

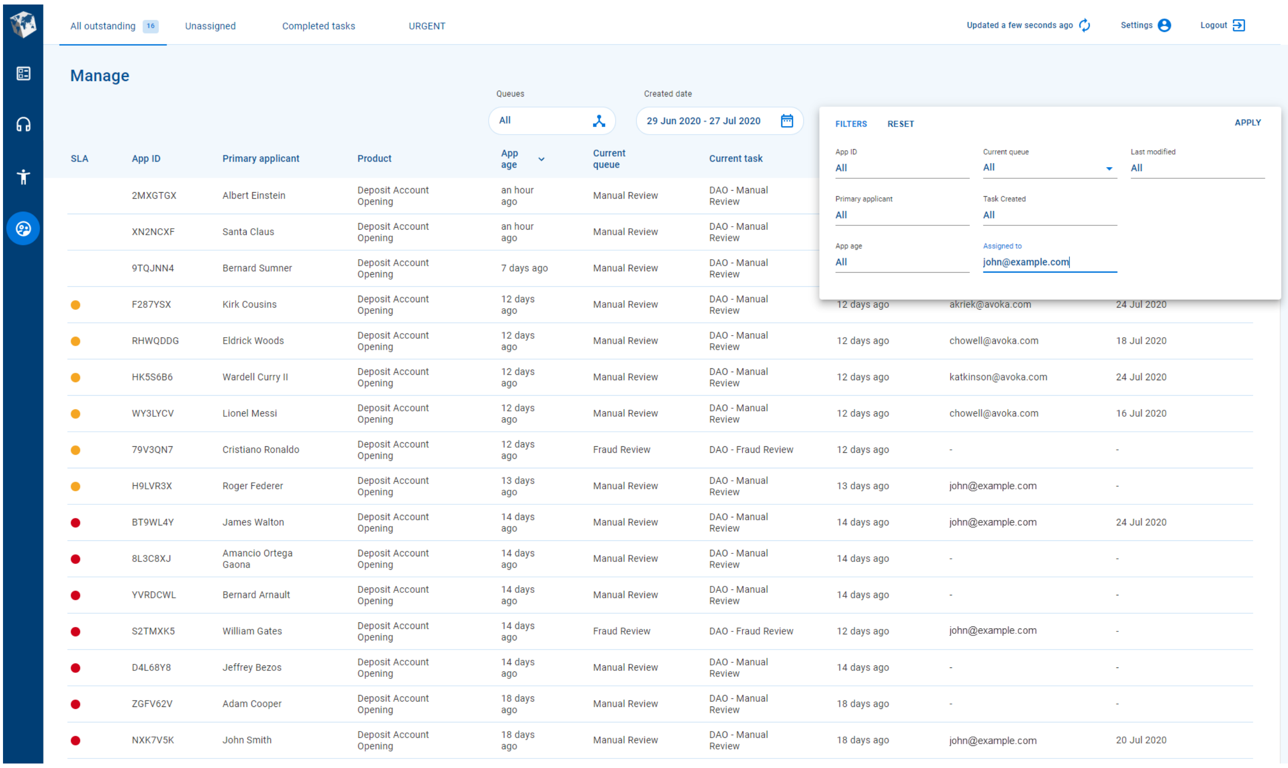


Alternatively, you can click the task to display its application details, then click **Assign** on the Details page and select the user to assign the task to.

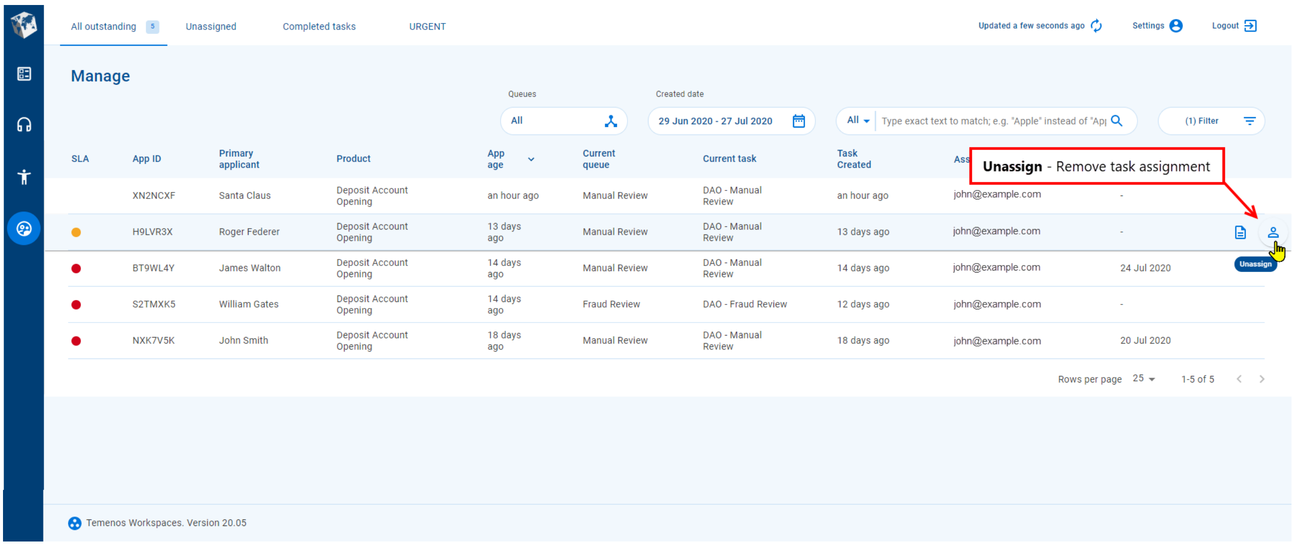
Remove a Task Assignment (Unassign)

This example shows you how to use a filter to narrow the item list down to just those tasks assigned to a specific Workspaces user, then unassign one of these task.

1. Login to Workspaces and select the **Manage** space.
2. Click **Filter** to display the Filters selector, then click the **Assigned to** field to display the user list.

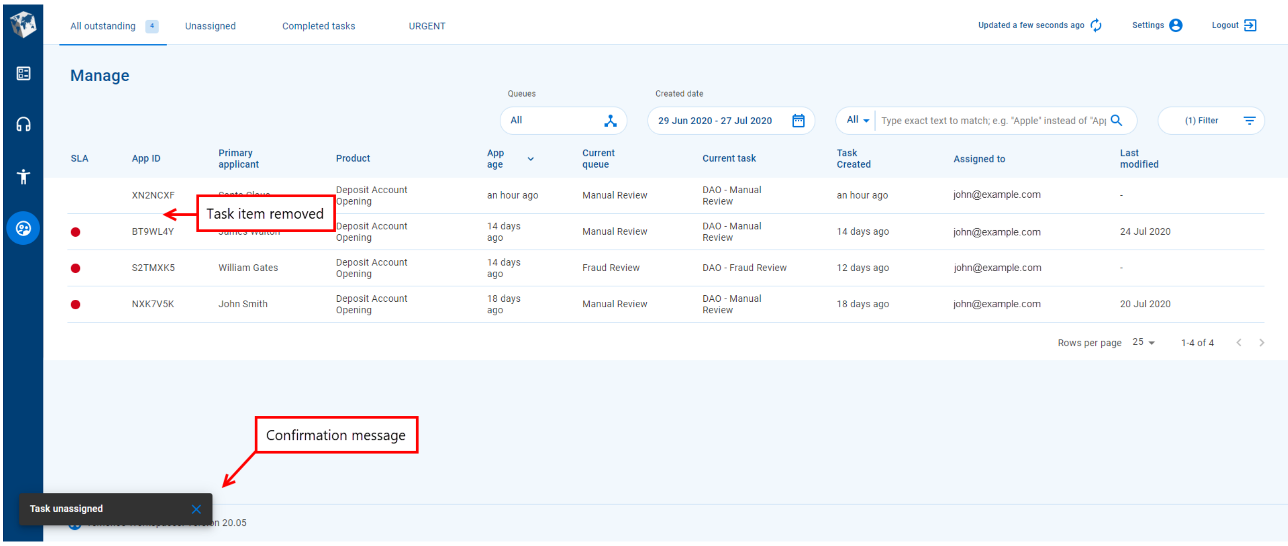


3. Select a user from the list then click outside the Filters selector twice to close it. This reduces the number of items in the item list, making it easier to see the task you want to unassign.
4. Now, you can unassign the task. Point your cursor at the task that you want to unassign – the available actions appear at the right-hand side. Click (Unassign) to remove the task assignment.



Alternatively, you can click the task to display its application details, then click **Unassign** on the Details page.

5. The value in the **Assigned to** column is cleared causing the task item to be removed from the item list as it no longer satisfies the filter criteria. A message confirming that you have unassigned the task is displayed briefly in the bottom left corner.



Workspaces Applicant Space Overview

Workspaces | Workspaces Applicant User | 21.11

Journey Workspaces is a highly configurable and feature-rich business portal, originally designed to support bank staff in conducting application-related activities such as application resolution and customer service. Workspaces users must be authorized and authenticated to access it, making it unavailable to anonymous non-bank users and, therefore, unsuitable for involving them in the application workflow. The Workspaces Applicant space is a new Journey Workspaces space providing an applicant-focused portal that enables your organization to improve the customer's application experience by involving them in the full application life cycle.

What is the Applicant space?

The Applicant space is a Workspaces extension offering an efficient, digital-first method for authenticated non-bank users to have a greater involvement in the application process. Within the Applicant space, users can initiate and submit applications, then manage and monitor their progress through to a final outcome. By giving the applicant (or their representative) more direct involvement in the application process, the Applicant space helps to improve the speed and accuracy of the application resolution process.

Key features of the Applicant space begin with an option to kick-start applications. Having done so, you can search and filter to find your applications, then view all the key details and monitor the progress of each application as it is processed. There are options to filter on useful criteria such as the application's id, the date it was started, and its status, so that you can find the application you need quickly. You can add notes throughout the application process to help bank staff process your application and potentially reduce delays in the application approval process. Any notes you add are available to all Workspaces users as part of an easy-to-understand audit trail of the application life cycle.

Out of the box, the Applicant space presents a thoughtfully designed and feature-rich interface based on a template that has all the features you need. This template represents a common application workflow scenario, and takes advantage of third-party integrations to add a suite of useful and practical features. The template accelerates the installation and configuration process and can be used as the basis for your own custom Applicant space experience.

The Applicant space relies on several core concepts that underpin Workspaces. To learn more about these, see Workspaces Core Concepts. Workspaces is designed to give you a great user experience right from the start with a consistent page structure and common user interface (UI) elements. To learn more about the Workspaces UI, see Workspaces UI Tour.

Who is the Applicant space for?

The Applicant space provides features for authenticated non-bank users such as applicants and their nominated representatives. Generally, an Applicant space user is a broker or other representative of an applicant rather than the applicant themselves. Anonymous and unauthenticated users cannot use the Applicant space.

What's included?

Applicant space includes features designed for applicants and their representatives.

- Kick-start an application, then save or submit it.
- Resume a saved application to continue adding details.
- Withdraw a submitted application if you change your mind.
- Recover a withdrawn or abandoned application.
- Search and filter options that help you find your applications.
- A detailed view of each application, including any attached documents which you can download.
- Monitor the progress of each application as it is processed.

Getting Started

Configuration

Workspaces is a highly configurable product, so we provide a default Applicant space configuration to get you up and going faster. Authorized users can download the latest Workspaces distribution which includes the default Applicant space configuration. More information is available in the Applicant space technical documentation to help you configure your Applicant space to meet your needs.

Browser Support

The Applicant space has been designed for and tested against the following web browsers.

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

For the best experience, we recommend that you use the latest version of Chrome, Firefox, or Edge, and that you keep your browser updated, especially through the application of security patches.

While you may be able to access the Applicant space using other browsers, there's no guarantee that everything will work, and you may not enjoy the great user experience available when using a supported browser. We strongly recommend that you use a supported browser for the best Applicant space experience.

The Applicant Space Search Screen

Workspaces | Workspaces Applicant User | 21.11

Some of the images and text in this topic may be different to what you see in your Workspaces Applicant space. This is because Workspaces is a highly configurable product, and this topic describes features based on the default Applicant space configuration which may differ from how your Applicant space is configured; for example, you may see different branding or other fields. Nevertheless, the features described below work the same way in every Applicant space.

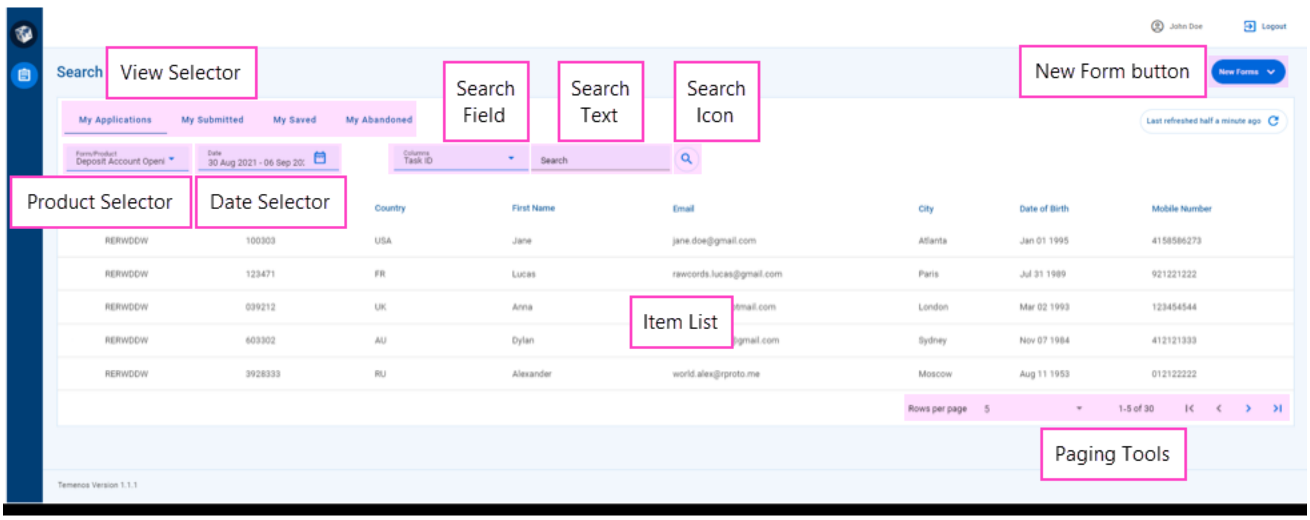
Overview

When you select the Applicant space, the first screen you see is the Search screen. This screen provides features that help you find your tasks and applications so that you can do what you need to to keep them progressing towards your desired outcome.

The Search screen includes the following features.

- An option to start a new application without leaving the Applicant space.
- An item list, populated with items matching various criteria, and which may be empty initially.
- A View selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- A Product selector that restricts the items in the item list to just those matching a selected product.
- A Created date selector that restricts the items in the item list based on the date they were created.
- Flexible search and sort options that you can use to refine the set of items in the item list.
- Paging tools that help you to browse the item list when the number of matching items exceeds the selected page size.

The following image illustrates where you can find these features.



At the top of the Search screen is the page header which provides common functionality applicable to all Workspacesscreens. Below this, the main element on the Search screen is the item list which displays summary information for a list of tasks or applications. The View, Product, and Created date selectors above the item list are the main way you control and identify which items are displayed in the item list.

- The **View selector** shows the name of the current view, and lets you select another view to quickly and easily change how the item list appears (including different fields or sort order) and which items are displayed.
- The **Product selector** shows the name of the active product type, and lets you select another product so that you can work with other tasks or applications.
- The **Created date selector** lets you hone in on items created in a specific period, and displays the date or date range that is currently selected.

If you've selected a view and applied some filters, and you still can't see the item you're looking for, there are a few more ways you can try to find it.

- **Search:** When you just want to find a specific item, you can search for it to find it straight away (or not at all). To learn how to search, see Search for a task.
- **Sort:** You can change how the list of items appears by sorting on a different field.
- **Browse:** You might not be sure which task or application you need until you see it. In this case, you can browse through the item list until you find what you need. A set of paging tools allows you to choose how many items are displayed in a page and browse the item listpages.

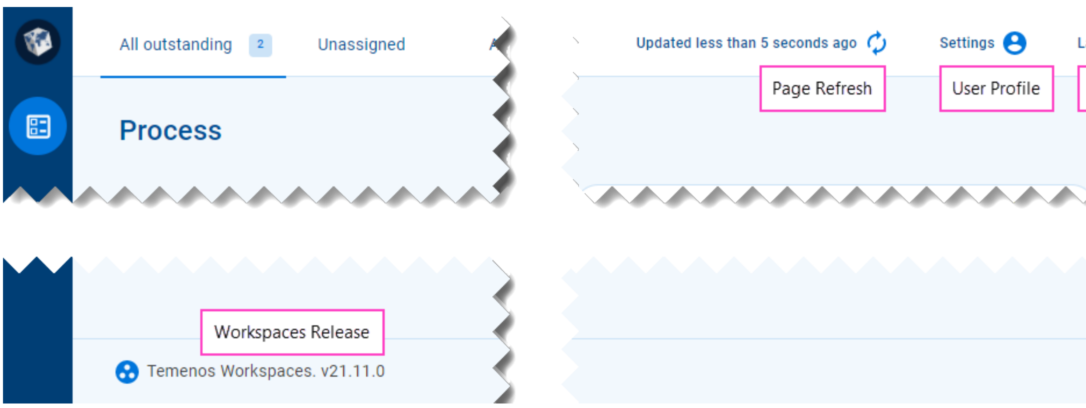
Once you've found the item you're looking for, select it to view more about it on the Details screen where you can interact with it further.

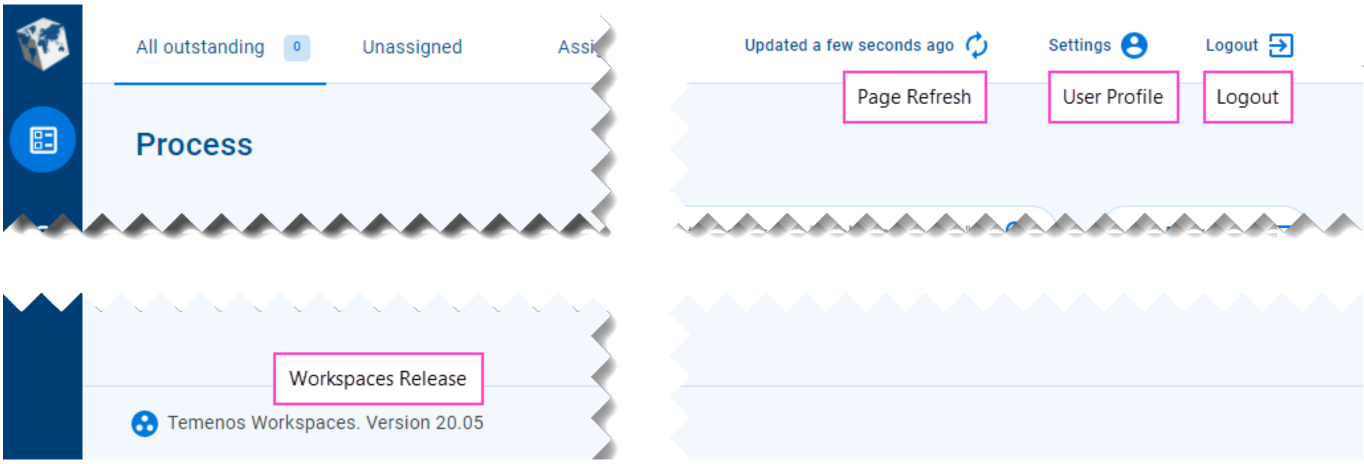
While you can't perform actions on existing tasks from the Search screen, you can start a new application.

Page Header

The page header is common to all Workspaces screens, displaying generic information and providing access to common features and menus.

21.11 20.05 Prior to 20.05





On the page header, you can find the following features.

- When the displayed information was last refreshed, and an option to refresh the displayed information.
- A menu button providing access to User Profile options.
- An option to select the language used for static text in the Workspaces UI. | 21.11
- An option to log out of your current Workspaces session.

Workspaces 21.11 introduced an automatic session logout after a defined period of inactivity. To learn more about configuring the session timeout period, see Session Timeout.

Workspaces releases prior to 20.05 also display the release version number in the header, while this has moved to the page footer in subsequent releases.

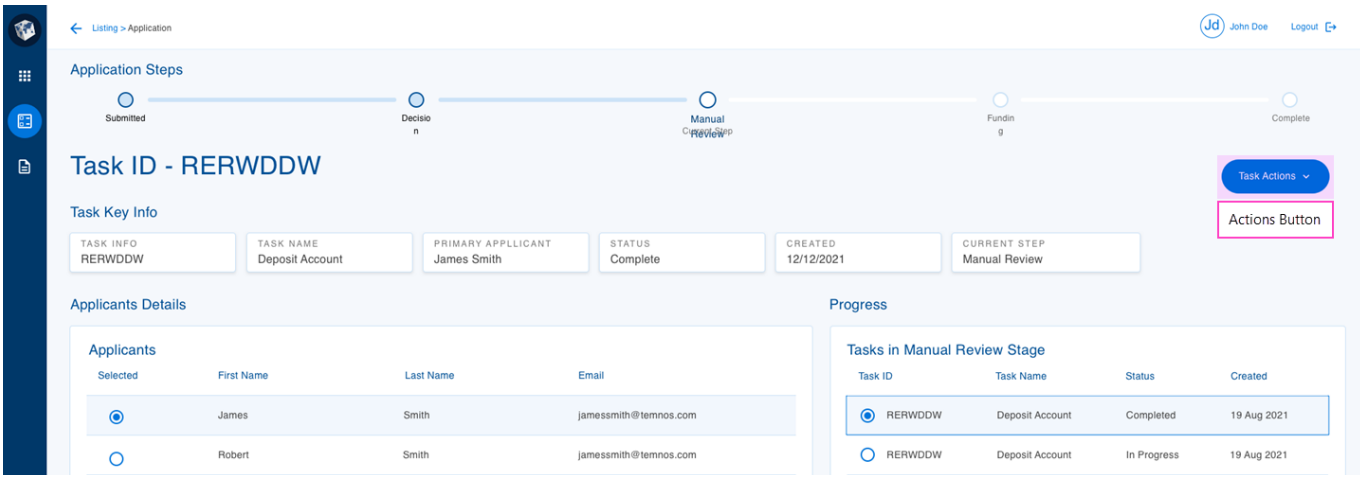
When you navigate to a Workspaces screen, the information displayed is up-to-date but it can become stale over time. The elapsed time since the screen was last updated is shown in the page header on the **Page Refresh** button. If the screen has not been updated recently or you want to see the latest information, click **Page Refresh** to update it.

To access the User Profile settings, click the **User Profile** button (1) and select **Settings** (2). Update your profile settings as required (3) and click **Save** (4), then close the profile window (5). A message confirming your profile update was successful is displayed in the bottom left corner of the main window (6). You can close the message (7) or wait for it to go away after a few seconds.

Start a New Application

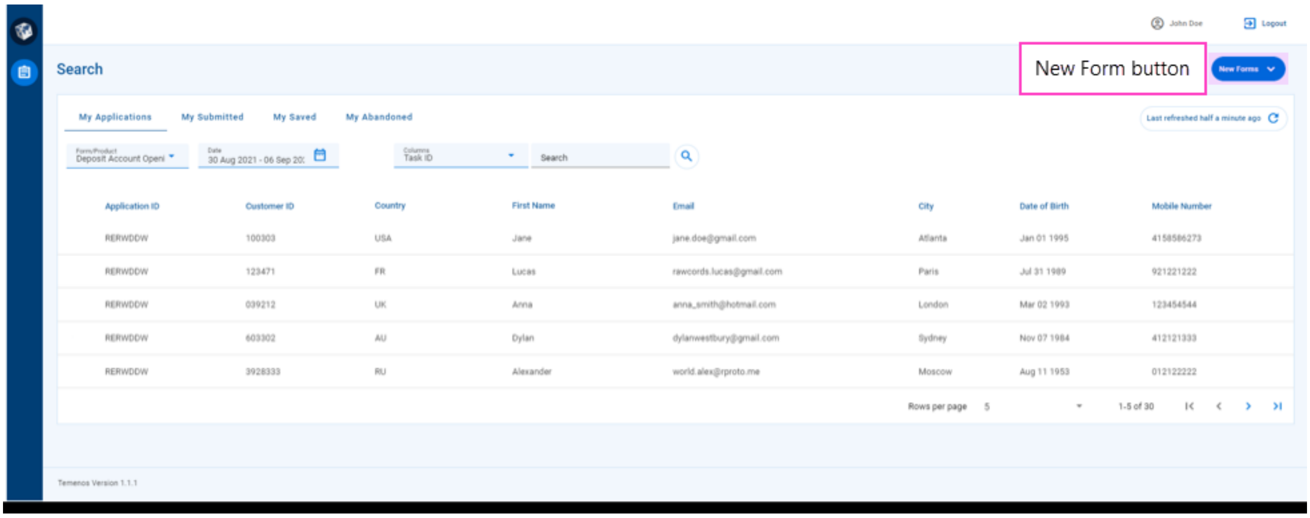
The Applicant space includes a set of standard actions for working with applications and tasks. However, unlike other Workspaces spaces, the Applicant space functionality cannot be extended using custom actions as these aren't currently supported in the Applicant space.

The only action available from the Search screen is New Application which you can use to start a new application. All other actions are available only from the Details screen; to learn more about them, see Applicant Space Actions.



> Button labels and hints (where available) are configurable and may not be the same as the standard action types in your Applicant space.

To start a new application, click **New Application** and select a form type from the list displayed.



Fill out the application form and then save or submit it. Your new application will appear at the top of the item list.

Item List

The main element on the Search screen is the item list, a tabular display of information relating to tasks or applications. Each row of the item list displays brief details for a single item to help you identify what you're interested in. The type of information displayed in each column is configurable, and this is one of the ways your Applicant space may differ from the default configuration.

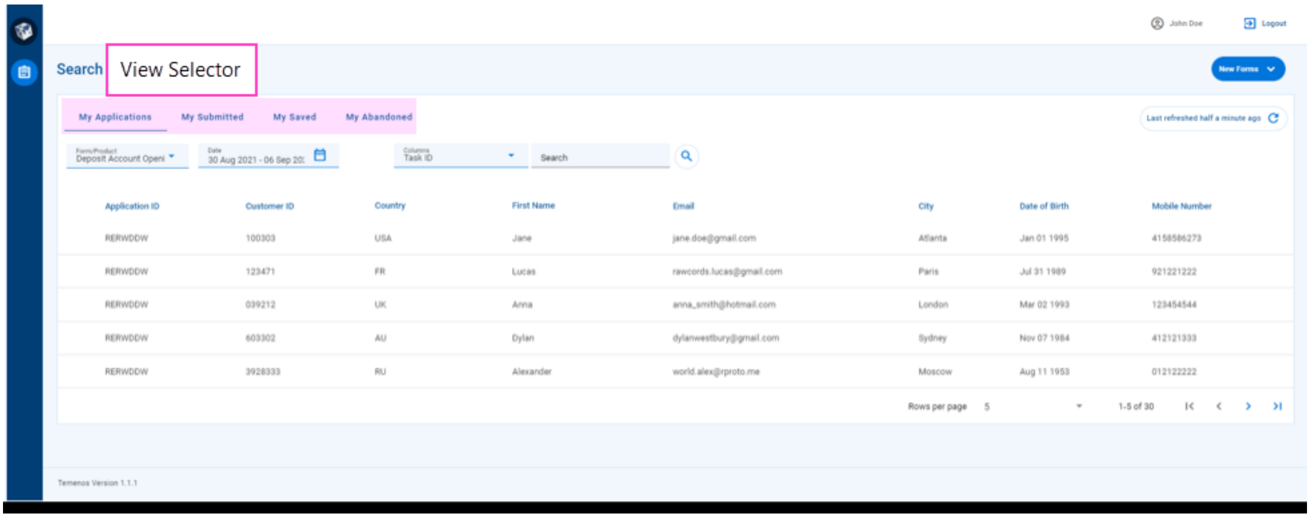
The items displayed in the item list satisfy a set of criteria that is determined by selecting a view then, optionally, further refining the list of items by selecting a product and/or a date range, or by searching for specific items. Items appear in the item list if they:

- relate to applications created by you; and
- match the criteria imposed by the current view; and
- (optionally) correspond to the value shown in the Product selector; and
- (optionally) were created on a date matching the date or date range shown in the Created date selector; and
- (optionally) match any optional search criteria applied by the user.

As noted above, you can only see items for applications that you created, whether they be your own applications (as an applicant) or applications you created on behalf of the applicant (for example, as a broker). If there are no matching items, the item list is empty; this will likely be the case the first time you login to the Applicant space.

View Selector

The **View selector** provides a quick and easy way to apply a view configuration to the item list so that you can focus on a particular set of items.



A view is a predefined item list configuration including fields, filters, and sort options. You can think of a view as a shortcut for applying a set of filter and sort options on top of a defined set of fields.

The default Applicant space configuration comes with several predefined views:

- **My applications:** All applications created by the current user (without any filters or search)
- **My submitted:** All applications created by the current user that have been submitted
- **My saved:** All applications created by the current user that have been saved but not yet submitted
- **My abandoned:** All of the current user's abandoned applications, regardless of how they were abandoned (that is, either as a deliberate action by a Workspaces user, or passively by the system when the data retention period has elapsed)

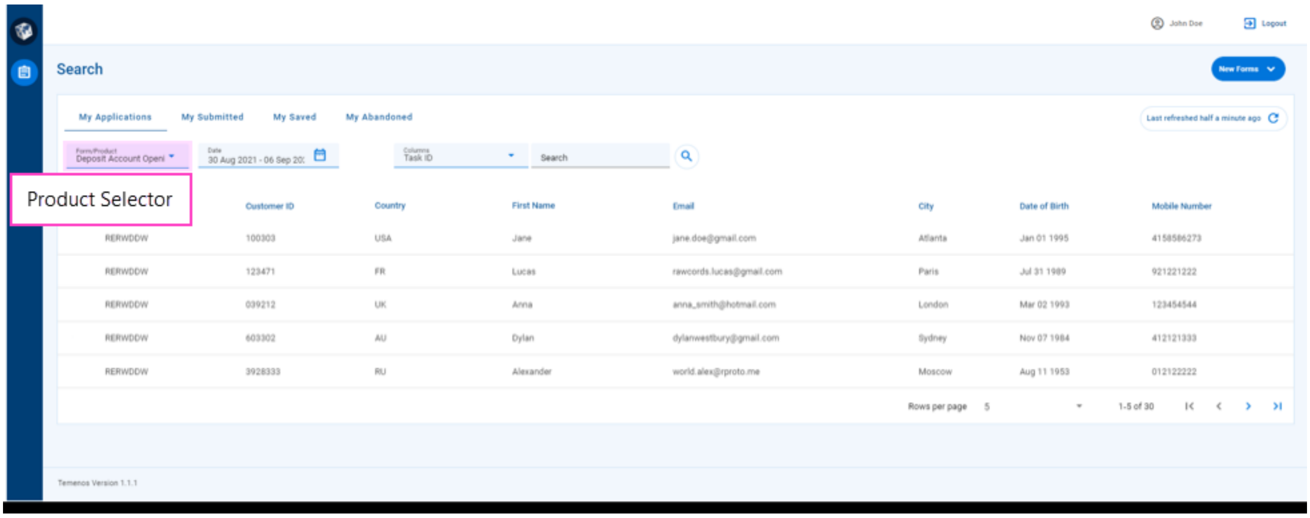
Each item in the View selector represents a view. Click an item in the View selector to make it the current view. When a view is selected, it's configuration is applied to the item list to restrict the items displayed. A color highlight provides a visual indication of which view is selected.

Usually, all available views will be visible in the View selector. However, if there's not enough screen space to display all the configured views, you can access the views that are not fully visible by pointing at the View selector and rolling your mouse's scroll wheel.

Views are configured by an Workspaces developer or administrator. As an Applicant space user, you can't change the way a view is defined but you can use filter, search, and sort options to refine the items displayed in the item list.

Product Selector

The **Product selector** is used in conjunction with other selectors and optional search criteria to populate the item list. The Product selector identifies the type of product currently used for populating the item list. Select a product from the Product selector to display only those items that match the selected product.

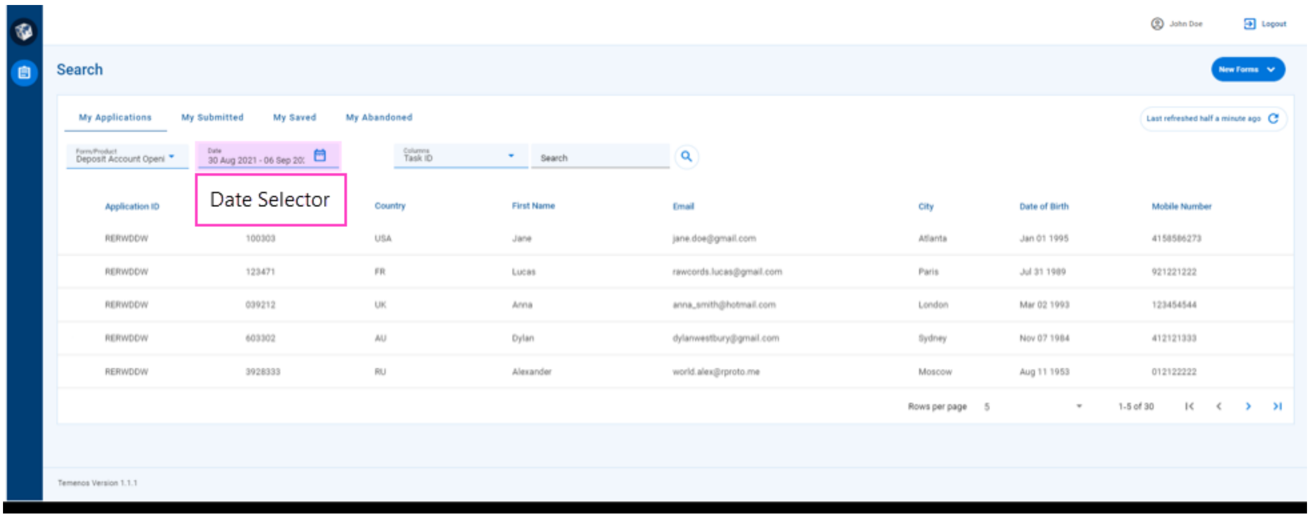


The available products are listed in the Product selector’s dropdown list as well as an **All** item. You can choose any product from the dropdown list to restrict the items displayed in the item list. If you choose **All**, the item list is populated with items for all products.

The first time you open the Search screen, the **All**product item is selected by default, so items matching all products (subject to any active filter or search) are displayed in the item list. Thereafter, Applicant space remembers the last product you chose, and selects it automatically when you open the Search screen.

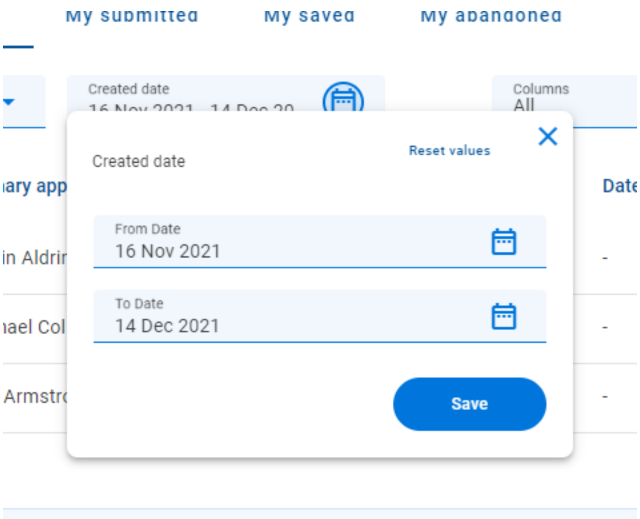
Created Date Selector

Another Search screen feature that helps to reduce the number of items presented to you is the **Created date selector** which displays the date or date range currently applied to the time list and lets you apply a different date filter.



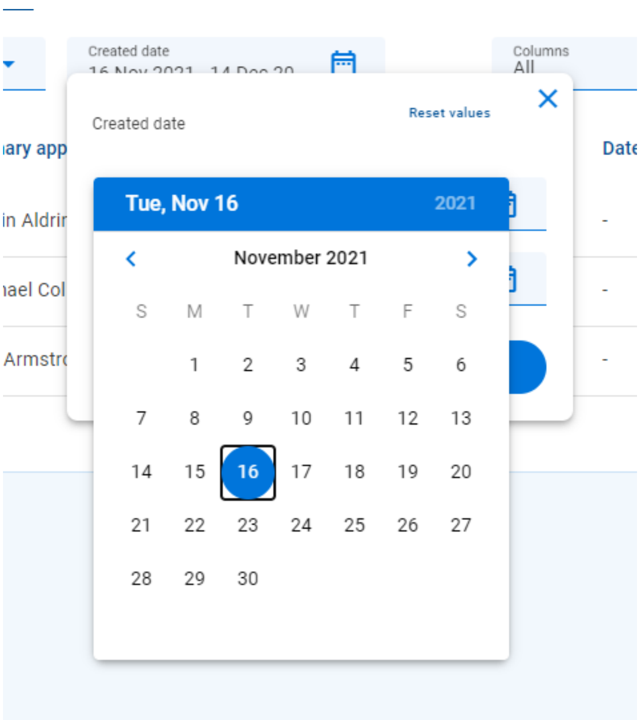
The default date filter restricts the items displayed in the item list to just those that were created in the last four weeks including the current date, and this filter is applied the first time you access the Search screen. You can select a different date filter using the Created date selector.

When you click the Created date selector, a date range dialog is displayed. This dialog includes two date fields, **From Date** and **To Date**, that together define a date range. To filter on a single date, select the same date for **From Date** and **To Date**.



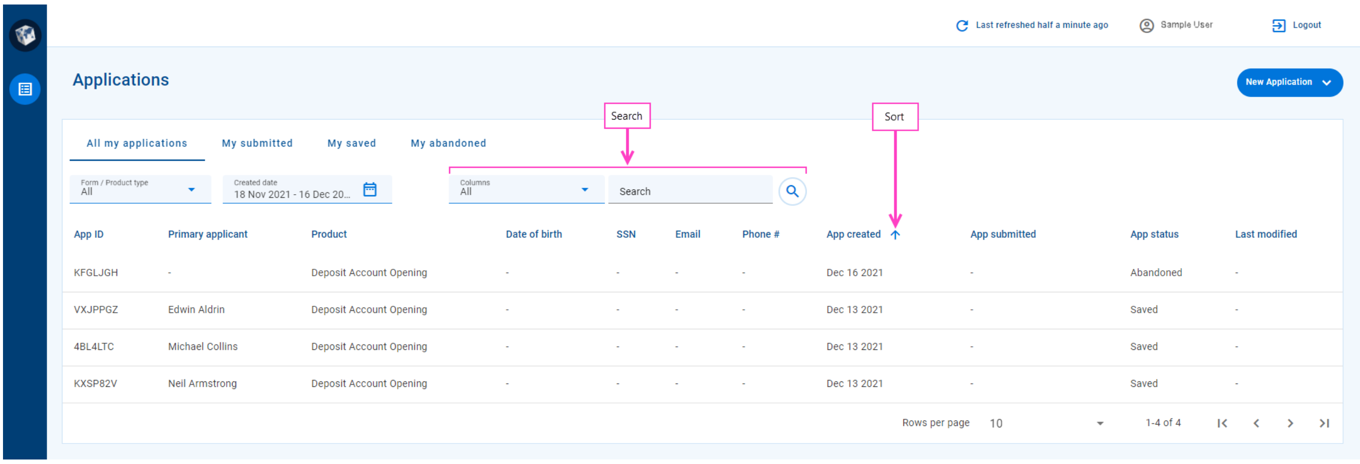
You can enter a date by selecting it from a calendar or typing it in. To discard any dates you've entered and revert back to the original dates when the dialog was displayed, click **Reset values**. Once you've entered the dates, click **Save** to apply the date filter. Alternatively, you can click (Close) to close the dialog without applying the new date filter while retaining the dates you selected.

Each date field includes a (Calendar) icon; click this icon to display a calendar from which you can select a date. You can click (Previous Month) or (Next Month) to browse to and select dates in other months.



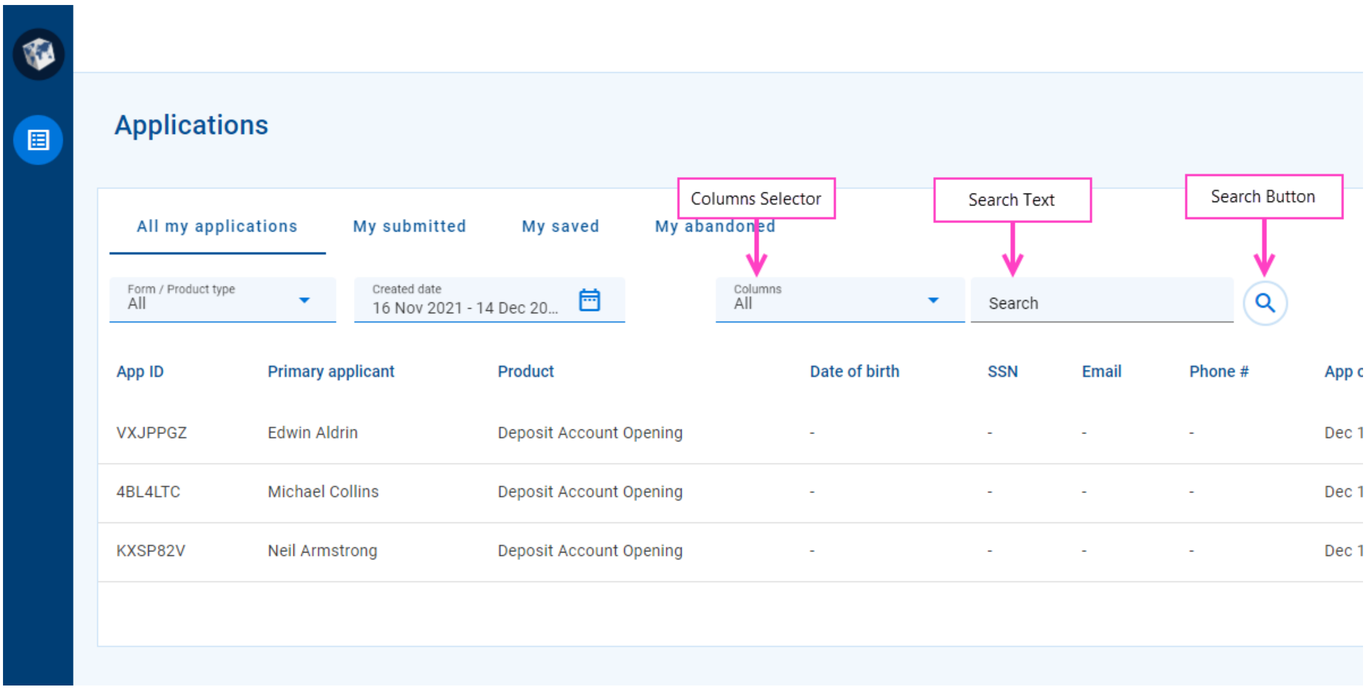
Search and Sort

By default, the item list shows items that satisfy the criteria defined by the current view and any selections from the Product and Created date selectors. This may still result in a large number of tasks which you might want to refine further. Searching and sorting can help you to focus on the tasks that are important to you right now.



Search for a Task

If you know which task or application you're looking for and you can't see it in the item list, you can try to search for it. Searching allows you to refine the list of items displayed to show just those relevant to what you are looking for.



Like the **Form / Product type** and **Created date** global filters, searching reduces the number of items in the item list by matching specific field (column) values. However, searching differs from the various selectors in a number of ways:

- Searching can target one field or multiple fields, whereas each selector is targeted at a single field.
- When searching on one field, the user can choose which field to target, whereas each selector is targeted at a predetermined field.
- When searching on multiple fields, the same search text is compared against all targeted fields. By contrast, the user needs to select a search value in each selector separately.
- Searching is supported for text fields only, whereas selectors support several different data types including dates.

To search for a task or application, select the search scope from the **Columns** selector, enter your search text in the **Search** field, and press `Enter` or click (Search). The search text is compared against the searchable fields in the search scope, and only matching items are displayed in the item list. If the search scope is **All**, the search text is compared against all searchable fields.

Here are some things to know about how searching works:

- Searching is case-insensitive; that is, it treats uppercase and lowercase characters as the same.
- Partial match is not currently supported, so searching only finds items that match the search text exactly (ignoring letter case).
- When a search is active, the items displayed in the item list satisfy the current view and filter selections as well as the search criteria.

A search remains active until you clear it. To clear a search, click the (Clear Search) button.

> Simply deleting all of the search text does not clear an active search. To clear a search, follow the instructions above.

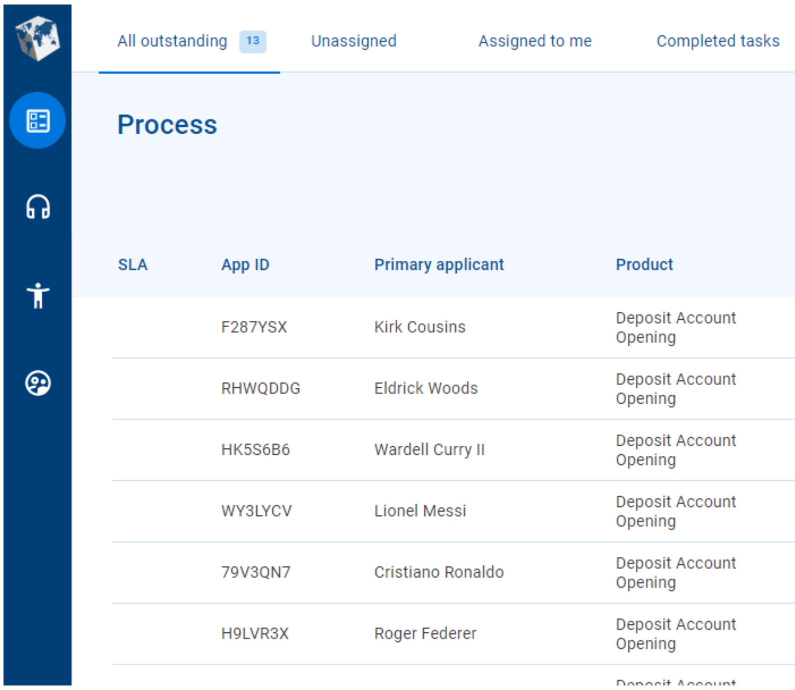
If you select an item in the item list while a search is active, when you subsequently return from the Details page to the List page, the search will still be active. This is indicated by the text and in the **Search** field.

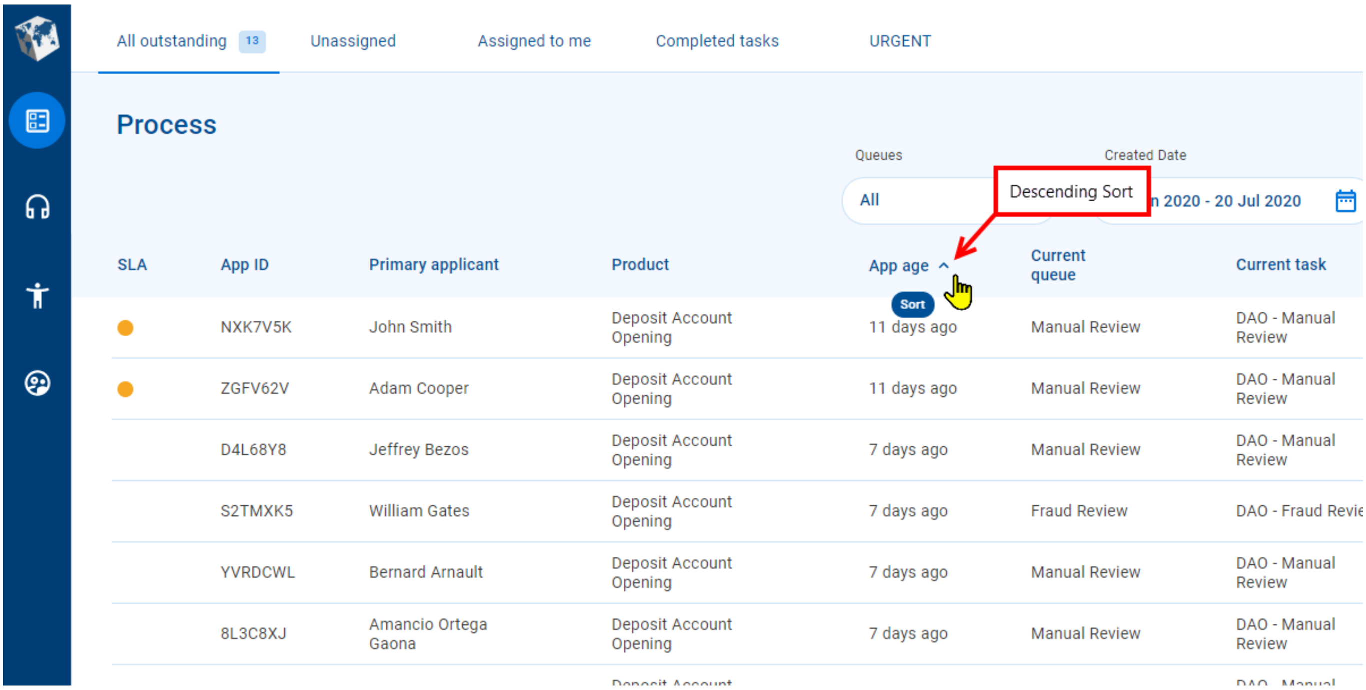
Sort the Item List

Items in the item list are displayed in an order determined by the current sort selection. This is indicated by an icon on the right-hand side of a column name. The (Sort Ascending) icon indicates the item list is sorted by the column values in ascending order, while (Sort Descending) indicates items are sorted by the column values in descending order.

Sort – Ascending order

Sort – Descending order

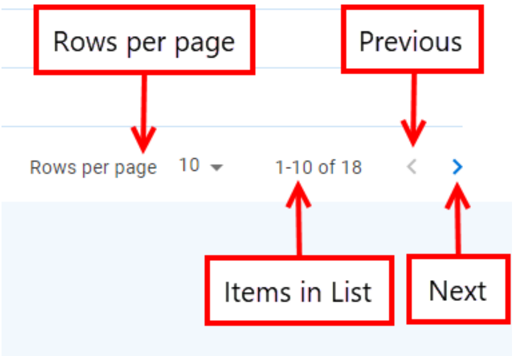




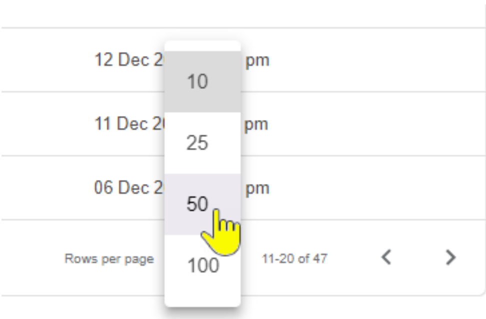
You can determine whether a column is available to use for sorting by pointing your cursor at a column heading. If your cursor changes to the hand pointer and a "Sort" tooltip is displayed, you can sort by the column. To change the sort order, click the column name. If you click the column name for the current sort selection, sorting will alternate between ascending and descending order.

Paging Tools

Paging tools allow you to choose the number of items to display on a page, and browse through pages if there are too many items to display on one page.



Rows per Page shows the maximum number of items displayed in the item list. You can choose a different page size from the Rows per Pagedropdown. When you choose a different page size, the item list resets to show you the first page again.



The **Previous Page** and **Next Page** tools allow you to browse through pages to find the tasks or applications you need to work with. Click these tools to fetch the previous or next page of items and display them in the item list. The Previous Page tool is disabled when the first page is displayed; similarly, the Next Page tool is disabled when the last page is displayed.

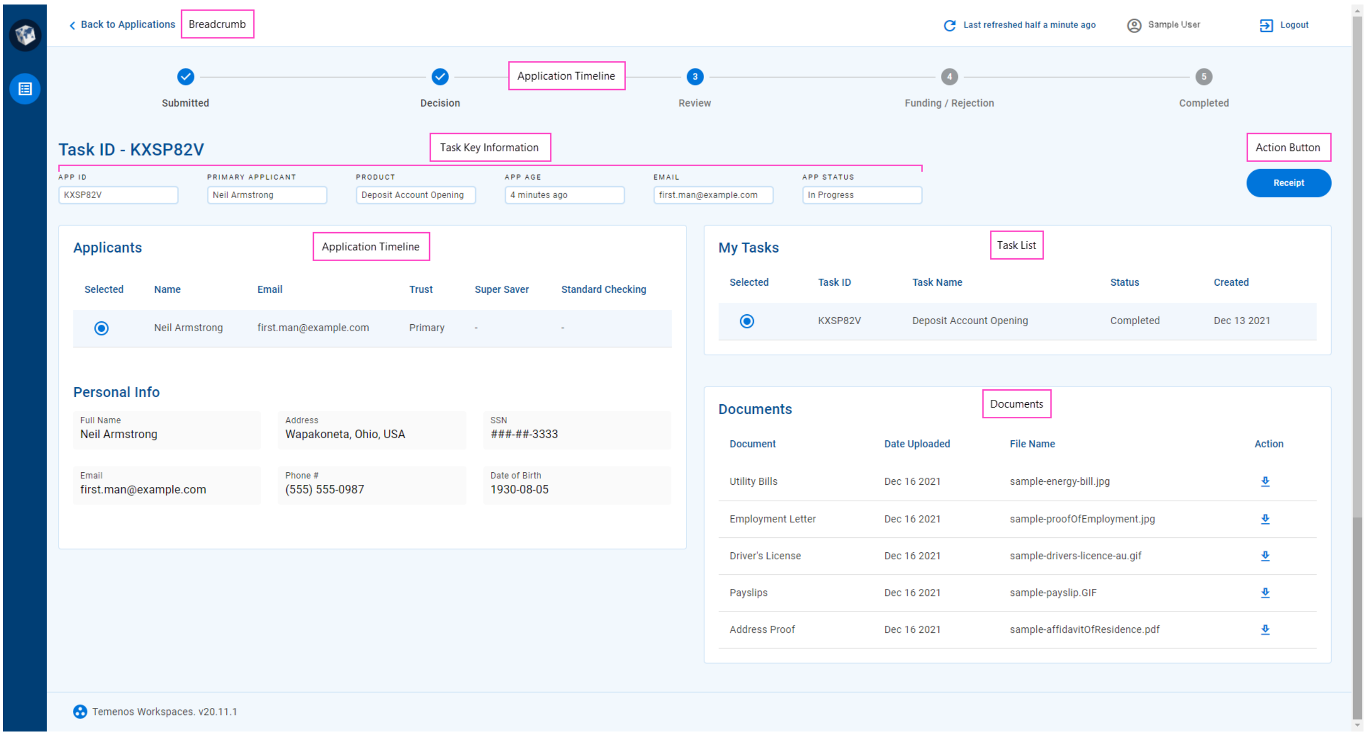
The Applicant Space Details Screen

Workspaces | Workspaces Applicant User | 21.11

Some of the images and text in this topic may be different to what you see in your Workspaces Applicant space. This is because Workspaces is a highly configurable product, and this topic describes features based on the default Applicant space configuration which may differ from how your Applicant space is configured; for example, you may see different branding or other fields. Nevertheless, the features described below work the same way in every Applicant space.

Overview

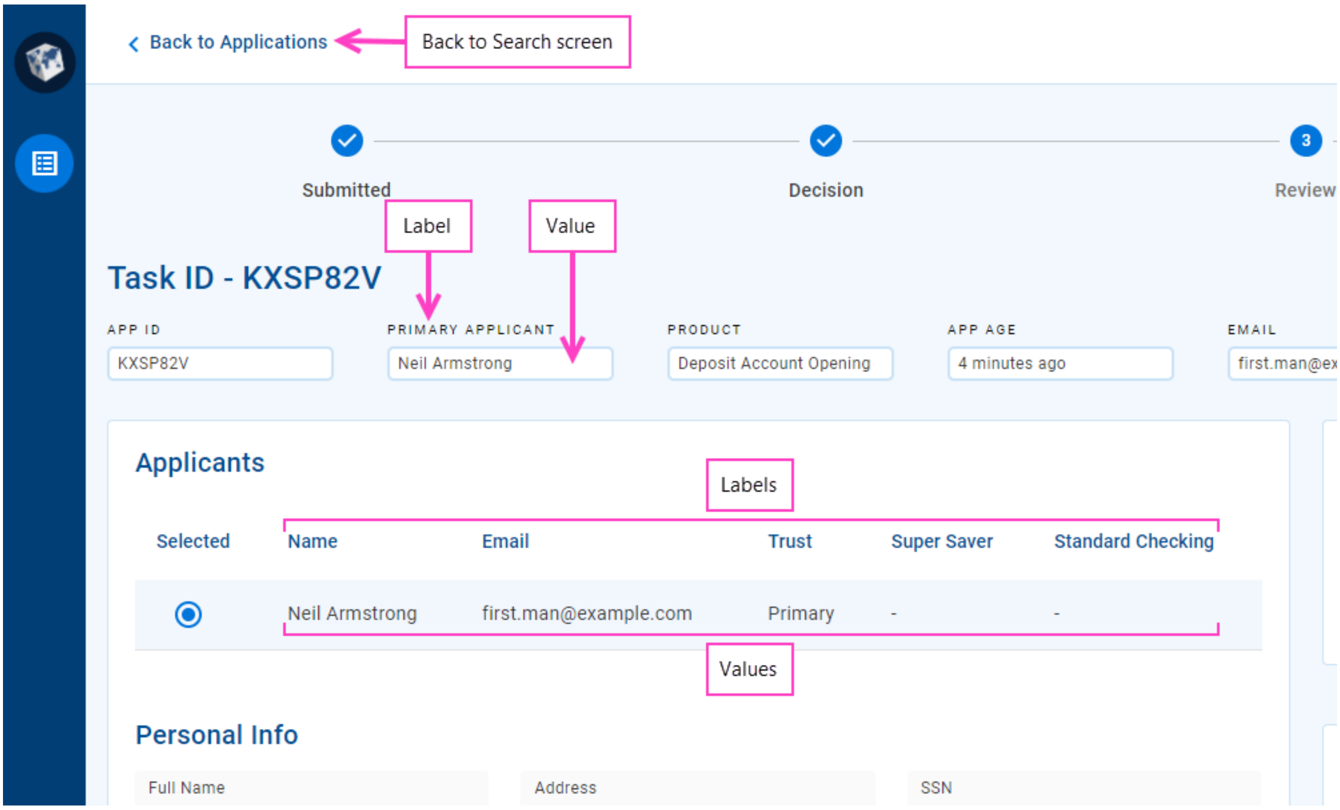
The Applicant space's Details screen is displayed when a user clicks an item on the Search screen. The Details screen shows information about individual item selected on the Search screen, and provides features for you to work with the tasks and application associated with that item. Information is displayed in the context of a selected task, and is reloaded whenever the user selects an item in the task list.



The Details screen in the Applicant space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected task, and provides access to actions that let the applicant contribute to the application's progression through its life cycle. This includes the following features, each of which is contained in a separate card or card section:

- A simple timeline display of application steps showing the status of each step.
- The list of tasks yet to be completed from which you can select one to focus on.
- Key information about the selected task.
- A set of standard actions that you can perform in the Applicant space at the current stage of the application's life cycle.
- Applicant details including a list of applicants from which you can select one to view more information about them such as identity and contact details.
- The outcomes of pre-configured background checks which provide an assessment of a selected applicant's suitability.
- Attached documents relating to the application.
- An optional display of custom information; for example, information that is not included in the standard cards, or that is presented differently.

Generally, each information item or data field on the Details screen has a label and a value. The label identifies the specific entity that the field relates to, and the value is the application data corresponding to the label. Sometimes, there may be multiple values for one label; for example, when data is presented in a table.



Fields display information of various data types including text (name, email address, some IDs), numbers (phone, SSN), and dates. A date may represent either a specific point in time (date of birth) or a duration (application age).

Numbers and dates can be configured to use a variety of formats. For example:

- Phone numbers can be formatted for the current locality or to accommodate internationalization.
- 9-digit Social Security Numbers are commonly displayed using the format "AAA-GG-SSSS".
- Dates representing a point in time can use either absolute ("1 Jan 2022", "today") or relative ("last Wednesday", "6 days ago") formats.
- Dates representing a duration can use either specific ("7 days, 3 hours, 26 minutes") or approximate ("about 7 days", "last week") formats.

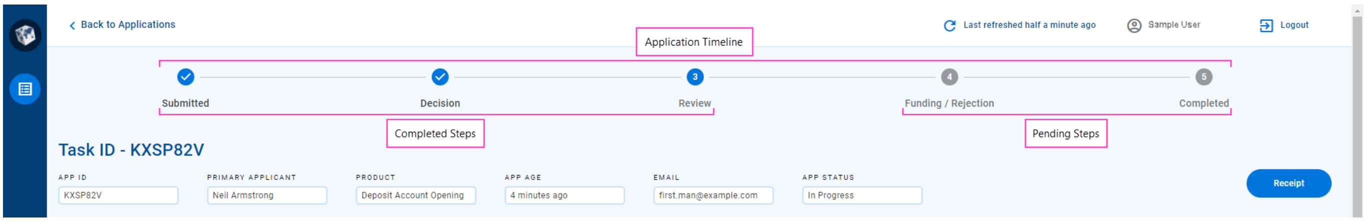
Sometimes a value might be too long to fit in the space available for it; in this case, the value is often truncated and an ellipsis ('…') is appended to indicate that you're not looking at the full value. To see the full value, point your cursor at the truncated value and a tool tip is displayed showing the full value.

By default, values in table columns wrap when they are wider than the column. However, sometimes this behavior is undesirable, and it can be overridden for specific columns via configuration.

To return to the Search screen, click the **Back to ...** link at the top of the screen, or click an item in the Spaces panel.

Application Timeline

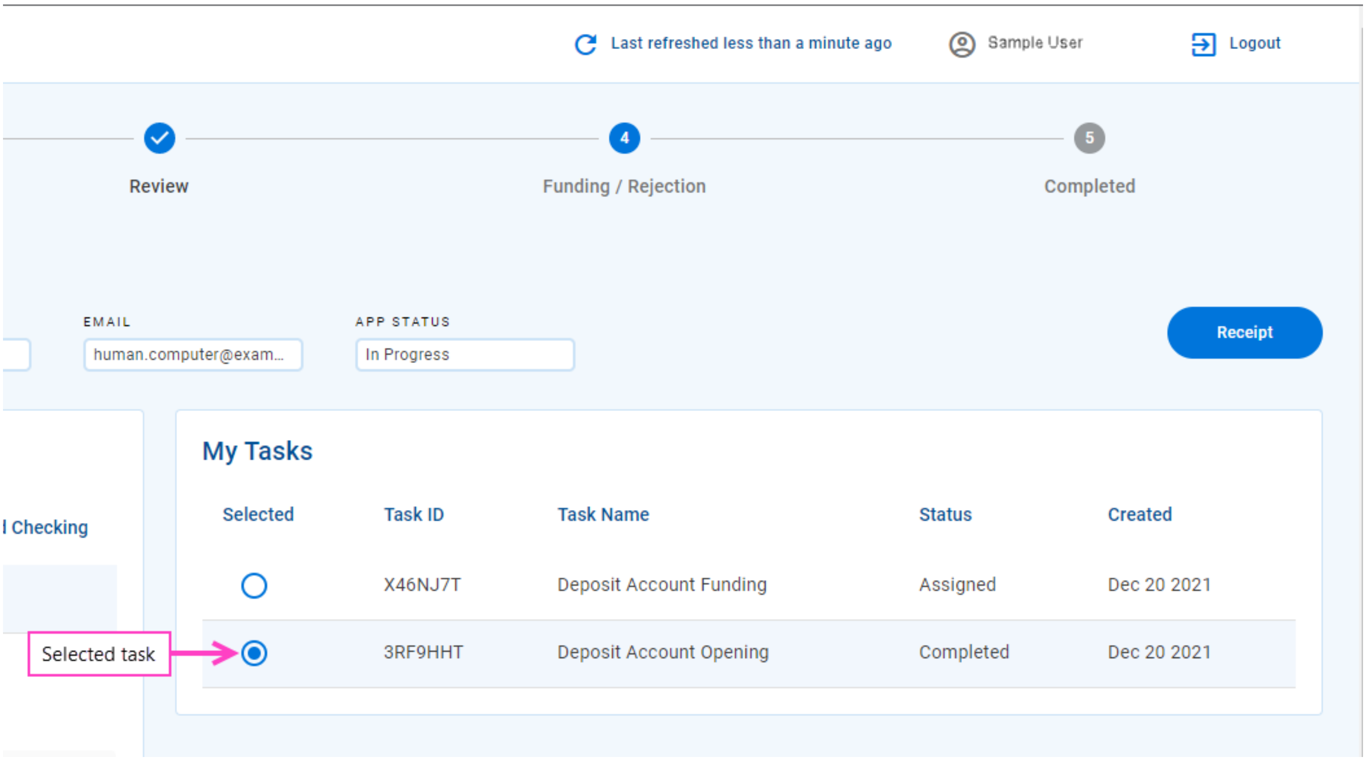
The Application Timeline provides a non-interactive graphical progress display relating to the steps in the application life cycle of submitted applications. Completed and pending steps are visually differentiated, allowing the user to see application progress at a glance.



The Application Timeline is hidden for saved applications. It is only display once an application has been submitted.

My Tasks

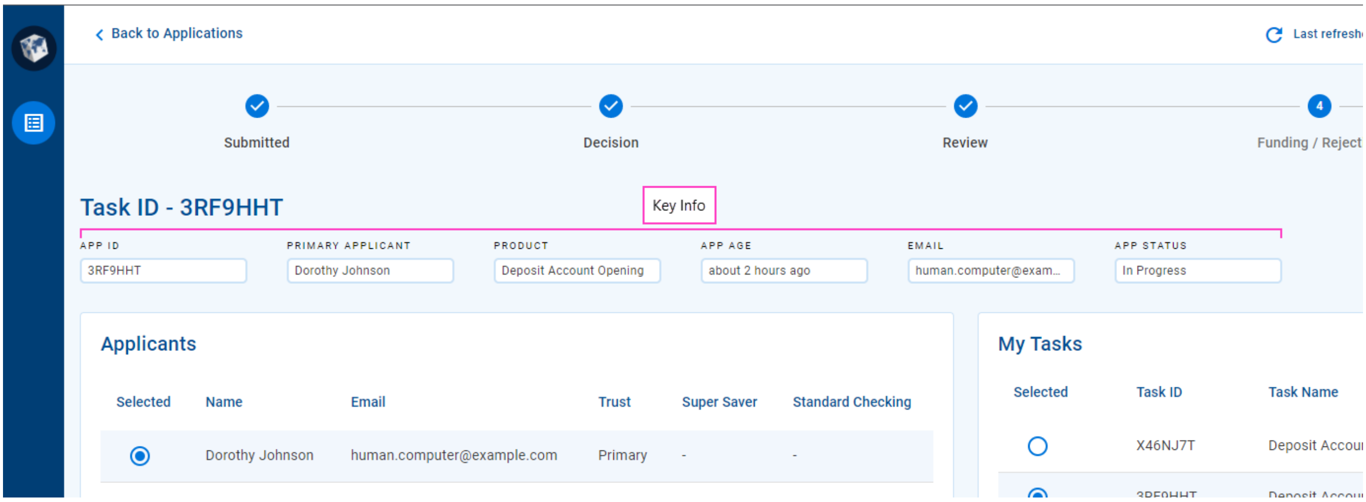
An item selected on the Search screen may have multiple tasks associated with it that the current user needs to complete. My Tasks displays this list of outstanding tasks and provides a way to navigate between them.



The tasks displayed in this list are ordered by creation date in reverse chronological order. Brief information is shown for each task including the task's ID, name, current status, and when it was created. When the Details screen is displayed, the last (that is, oldest) task in the list is selected automatically. You can select any task from the list to reload this screen with information for that task. The currently selected task is indicated visually in the list.

Key Information

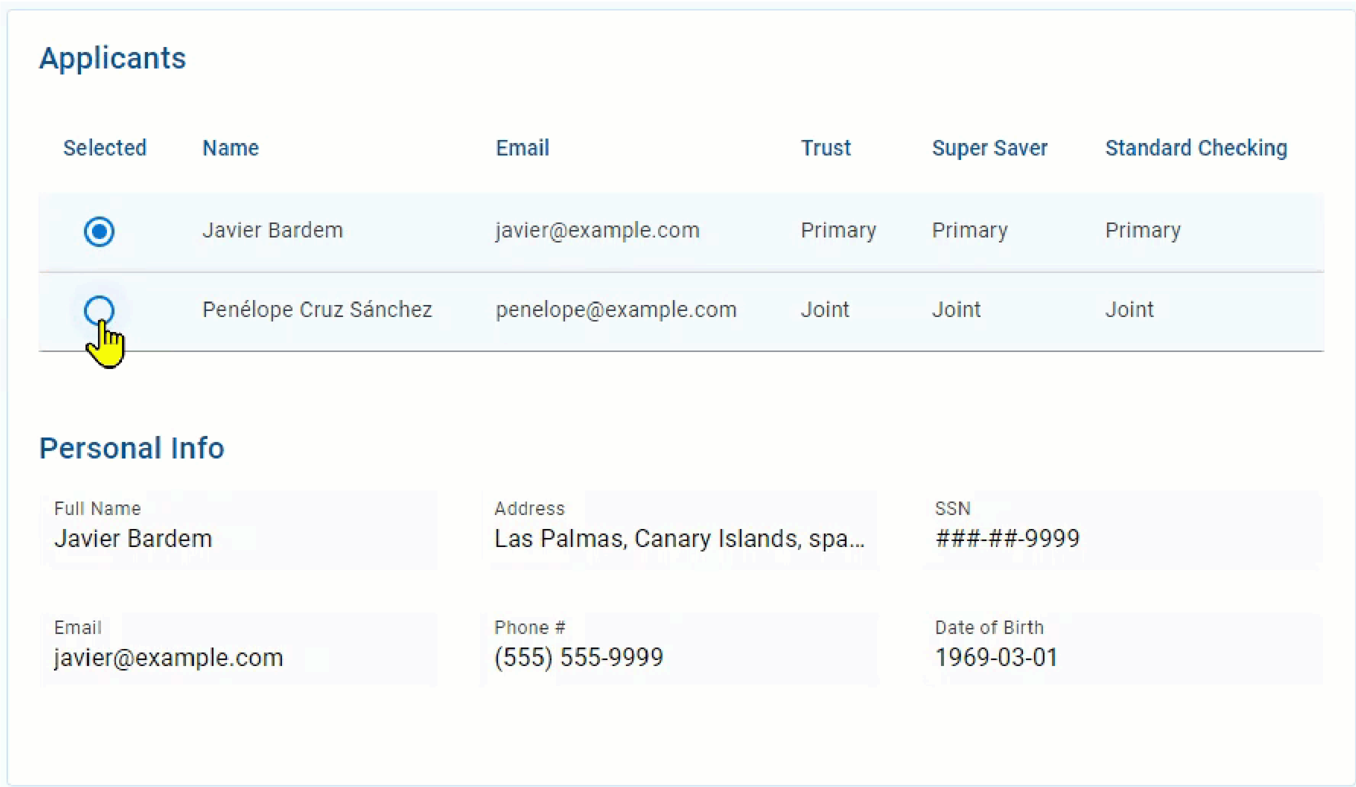
The Key Information card displays important task information that's handy for Applicant space users to have at their fingertips.



The Key Info card includes between four and six items depending on the width of your browser window. The full width layout accommodates six key info items but as the width of your browser becomes smaller, items are removed progressively until only four items are displayed. Each key info item has a label and a value.

Applicant Details

When filling out an application, it's generally necessary to provide personally identifiable information (**PII**[1]) for each applicant that uniquely identifies them, and which is often used to perform background checks that are critical in successfully processing the application. In the Applicant space, this information is displayed in the Applicant Details card.



At the top of the card is an **Applicants** section listing all of the applicants associated with the application. This section displays key applicant-related information for each applicant including their name and email address. Select an applicant from this section to display more information for that applicant in the other sections of this card below the list.

[1] Personally Identifiable Information (PII) is information about an individual that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and any other information that is linked to an individual.

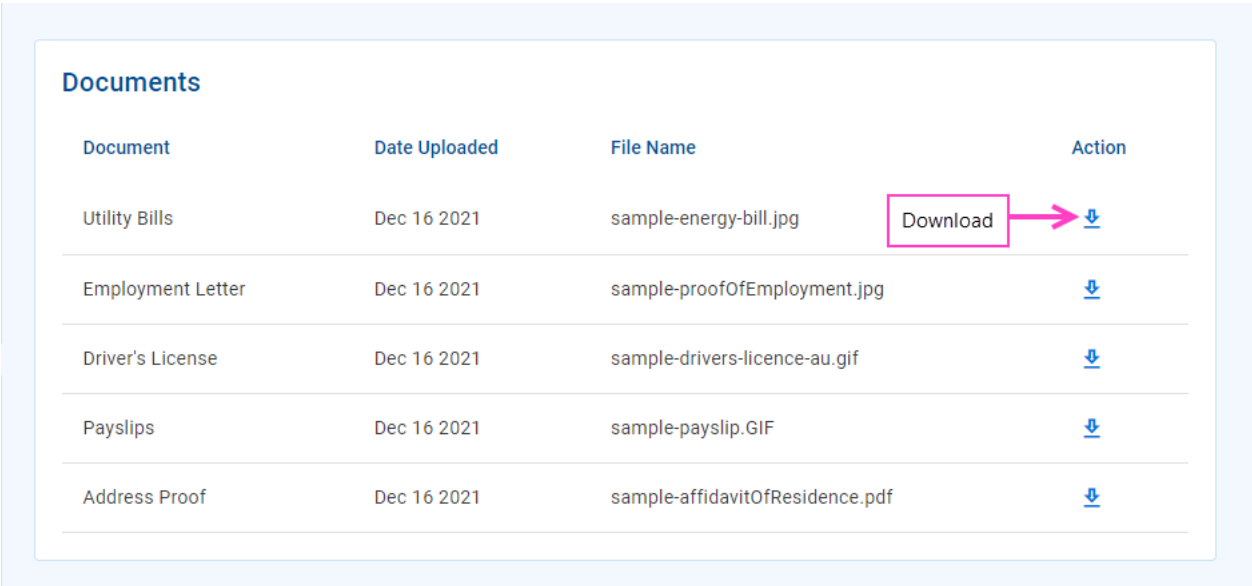
Sections below the Applicants list show information about the selected applicant in a grid layout that improves the user experience when dealing with applications that include multiple applicants. A **Personal Info** section displays the selected applicant's personal information including their full name, address, email, date of birth, and some country-specific identity information (such as a Social Security Number in USA). This section may be followed by other sections showing more detailed information relating to the selected applicant; for example, a more detailed address, or more details for an associated identity document such as the document type and number as well as when and where it was issued. Additionally, your Applicant space may be configured to include a section displaying the results of identity checks or verifications relating to the selected applicant. To learn more about how these background checks are displayed, see Background Checks.

My Documents

Applicants are often required to provide documentary evidence, such as a drivers license or an energy bill, to corroborate the details they have entered in their application. These documents are attached to the application, and made available to an Applicant space user in the **Documents** card.

Each item in the Documents card contains the following elements.

- **Document:** This identifies the kind of information in the document file, and is assigned automatically when a document is uploaded by the applicant while filling in the application.
- **Date Uploaded:** A timestamp that shows when the document file was uploaded and attached to the application.
- **File name:** The file name of the document when it was uploaded and attached to the application.
- **Download:** On the right-hand side of each document item is a (Download) icon that you can click to download the document file.

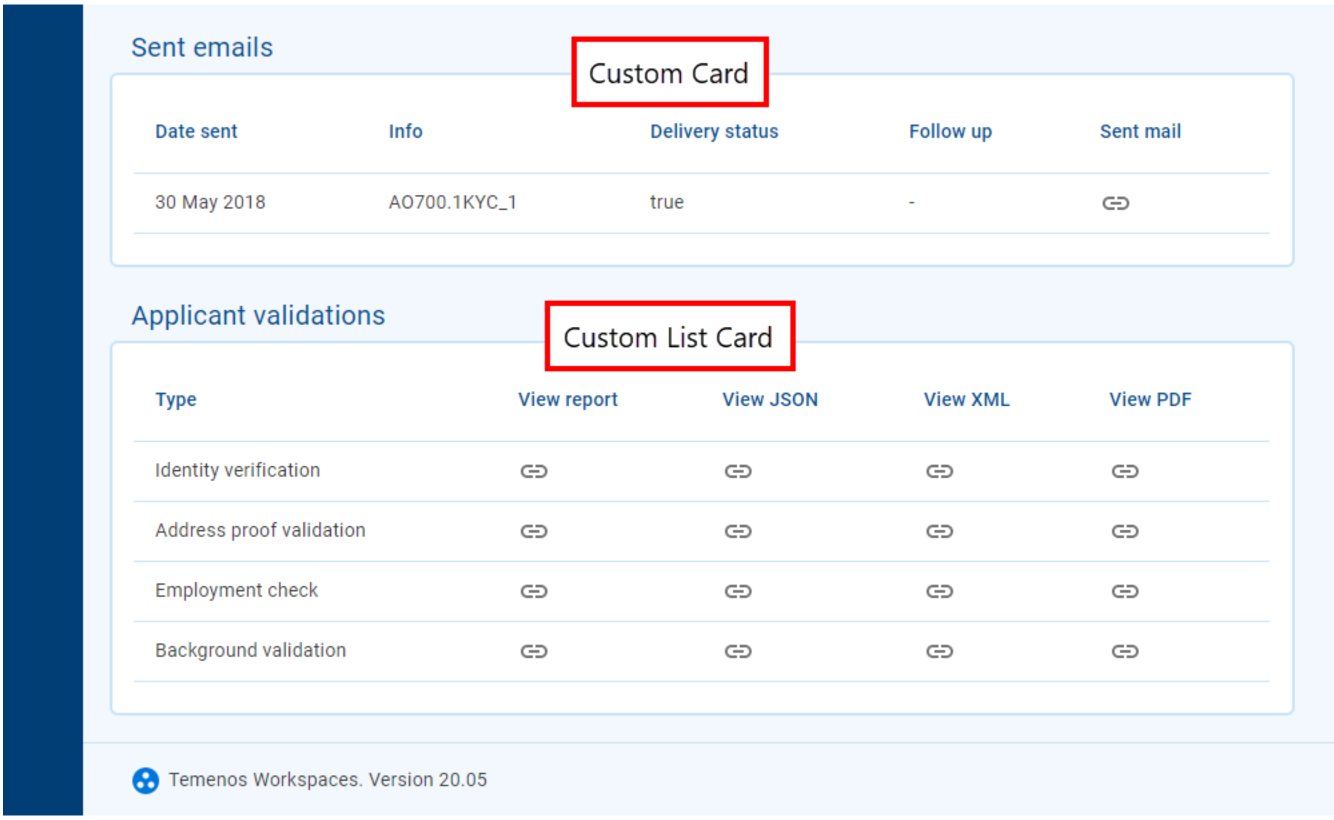


Document	Date Uploaded	File Name	Action
Utility Bills	Dec 16 2021	sample-energy-bill.jpg	
Employment Letter	Dec 16 2021	sample-proofOfEmployment.jpg	
Driver's License	Dec 16 2021	sample-drivers-licence-au.gif	
Payslips	Dec 16 2021	sample-payslip.GIF	
Address Proof	Dec 16 2021	sample-affidavitOfResidence.pdf	

An Applicant space user cannot change the way documents appear on the Documents card, nor can they upload or manage the documents attached to an application in any way. The only action they can perform on a document is to download it.

Custom Information

In addition to the information displayed on the predefined cards, other important information can be displayed in custom cards. Two formats are supported: a standard custom card to display a set of single-value data and a list custom card that can display lists or tabular data.



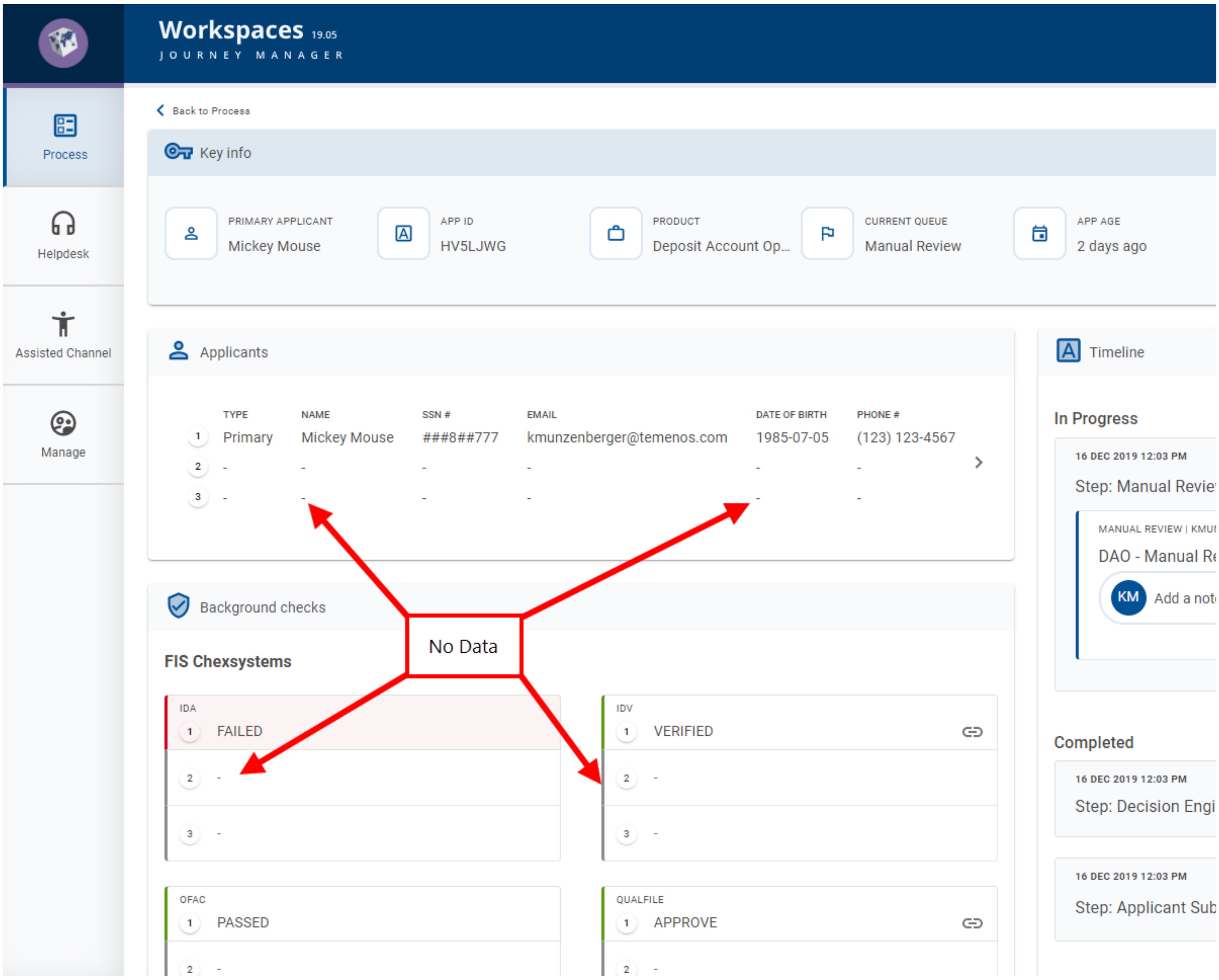
A standard custom card is configured to display a set of data items and a single value for each data item. By contrast, the list custom card displays data in a tabular format with each column representing a different data item and each row being a related set of values. A (Detail Link) icon may be displayed for any data item; click the link icon to display more information about the data item in a pop-up window.

> In addition to standard data values and data links, custom cards also support download links. Click a download link to download the target file associated with the link.

Custom cards provide a read-only view of the information presented. An Applicant space user has no control over the way these cards appear and cannot modify the displayed data.

No Data Scenario

Sometimes, data may not be available in the Applicant space for one or more data items. This could be because the expected data does not exist (for example, has not been collected) or because a technical issue prevents the Applicant space from being able to obtain the data. The Applicant space can be configured to indicate that expected data is not available by displaying a dash '–' instead of the data value. The lack of data is reinforced by the use of gray color for UI elements relating to these data items.



WorkspacesThe Applicant space can also be configured to hide items with no data, so you may not even see fields or records with no data.

Applicant Space Actions

The Applicant space includes a set of standard actions for working with applications and tasks. However, unlike other Workspaces spaces, the Applicant space functionality cannot be extended using custom actions as these aren't currently supported in the Applicant space.

The standard actions in the Applicant space are:

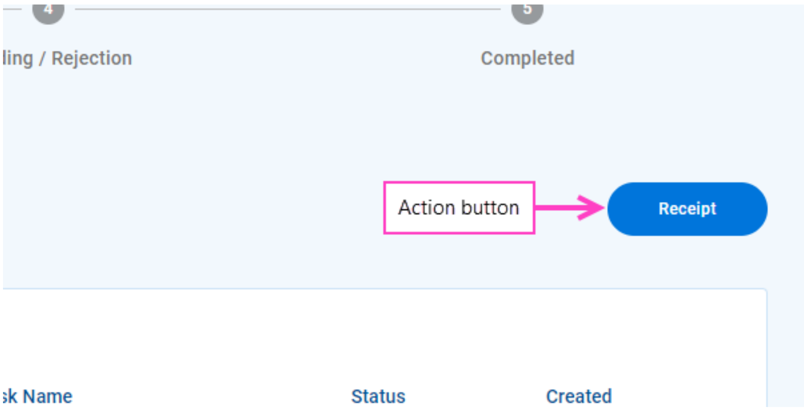
- New Application – Start a new application in the Applicant space.
- Receipt – See a read-only view of a submitted application.
- Recover – Recover an abandoned or withdrawn application so that the applicant can continue with it.
- Resume – Resume an unsubmitted application in a modal window.
- Withdraw – Cancel an application that has been saved but not yet submitted.

With the exception of New Application, all of these actions are available from the Details screen via the Action button to the right of the Key Info card.

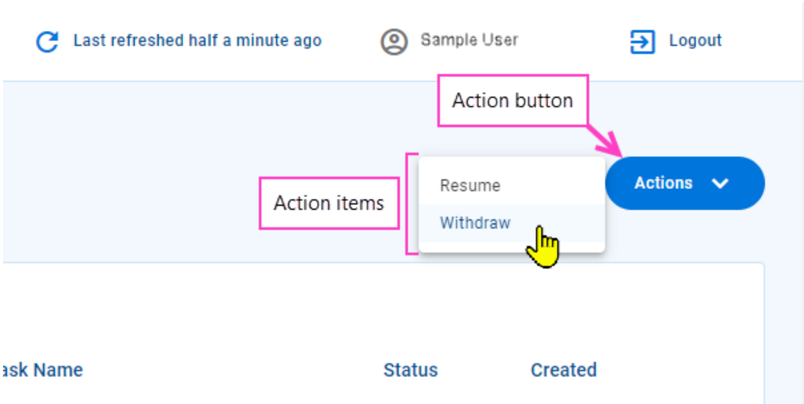
You can start a new application from the Search screen.

The Action button changes according to how many actions are available.

- **One action:** The button label is the name of the action, and clicking the button performs the action.



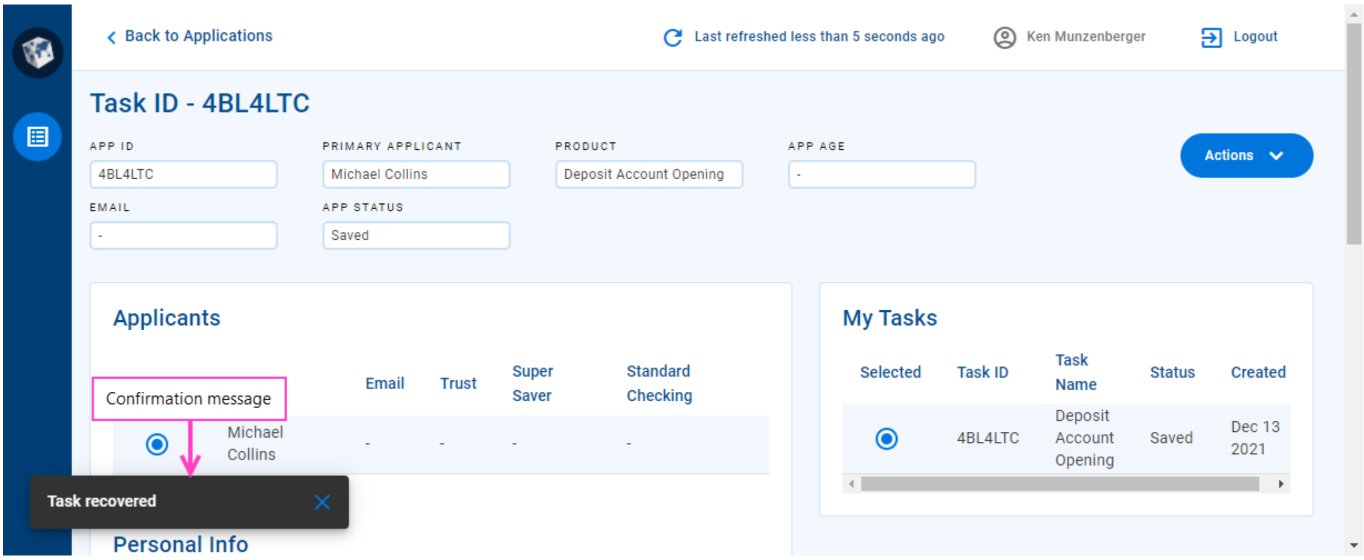
- **Multiple actions:** The button label is 'Actions', and clicking the button displays a dropdown list containing one item for each available action. Select an item to perform that action.



Different actions may be available for each task because the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Recover action will be available only for an application that has been abandoned.

Button labels and hints (where available) are configurable and may not be the same as the standard action types in your Applicant space.

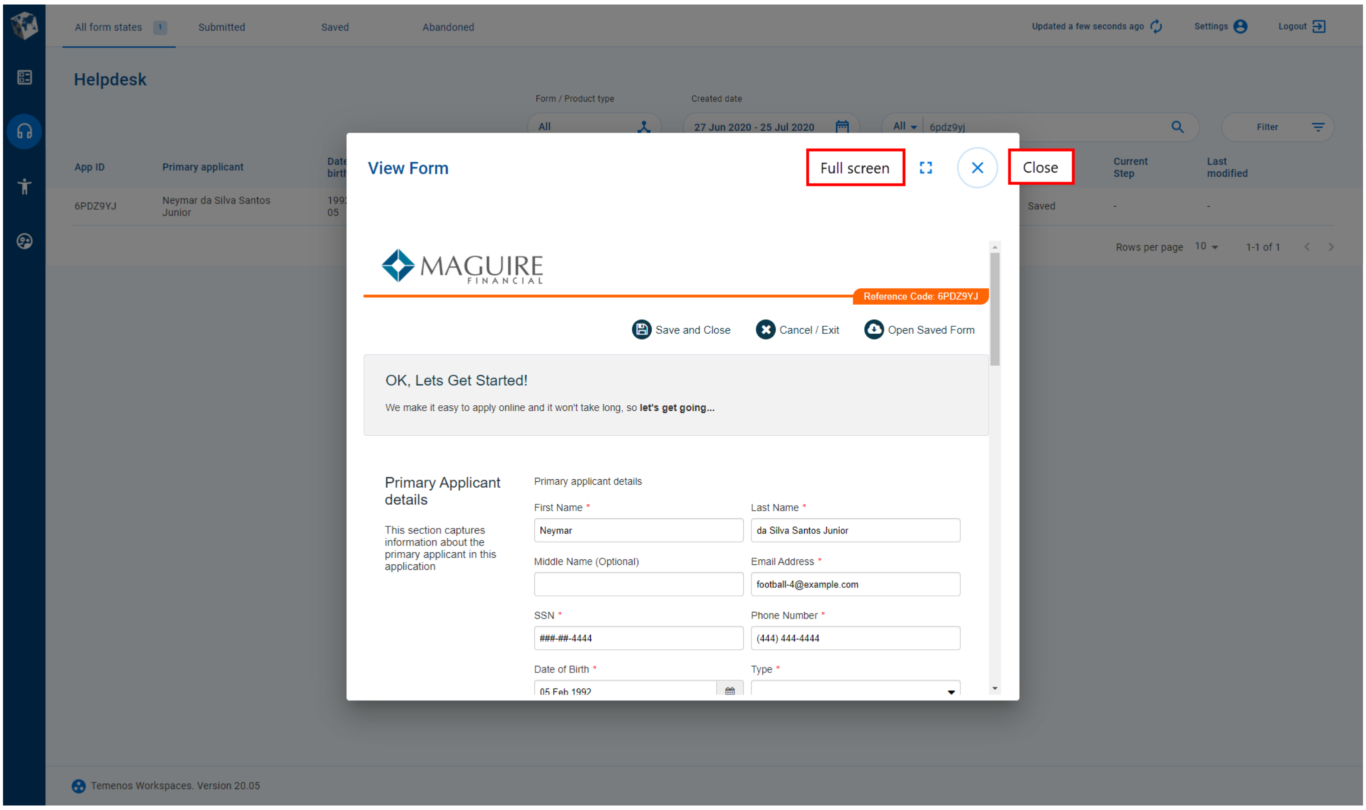
Some actions display a brief message in the bottom right corner of the screen confirming that your desired action was successful or notifying you that something went wrong.



Resume an Application

After you start an application, you may find that you don't have all the information you need at hand to complete the application, so you save it for now while you go and find what you need. Once you have all the information for your application, you can resume your saved application to complete it and submit it.

To view the information for an application that has been submitted, use the Receipt action.



When you resume an application, the information previously entered is displayed in the same form that was used to capture that information. While resuming an application and viewing a receipt both show you the application form, these two actions differ in one key way. When you view a receipt, the application form is displayed read-only. However, when you resume an application, you can enter or update information in the application form and then submit it.

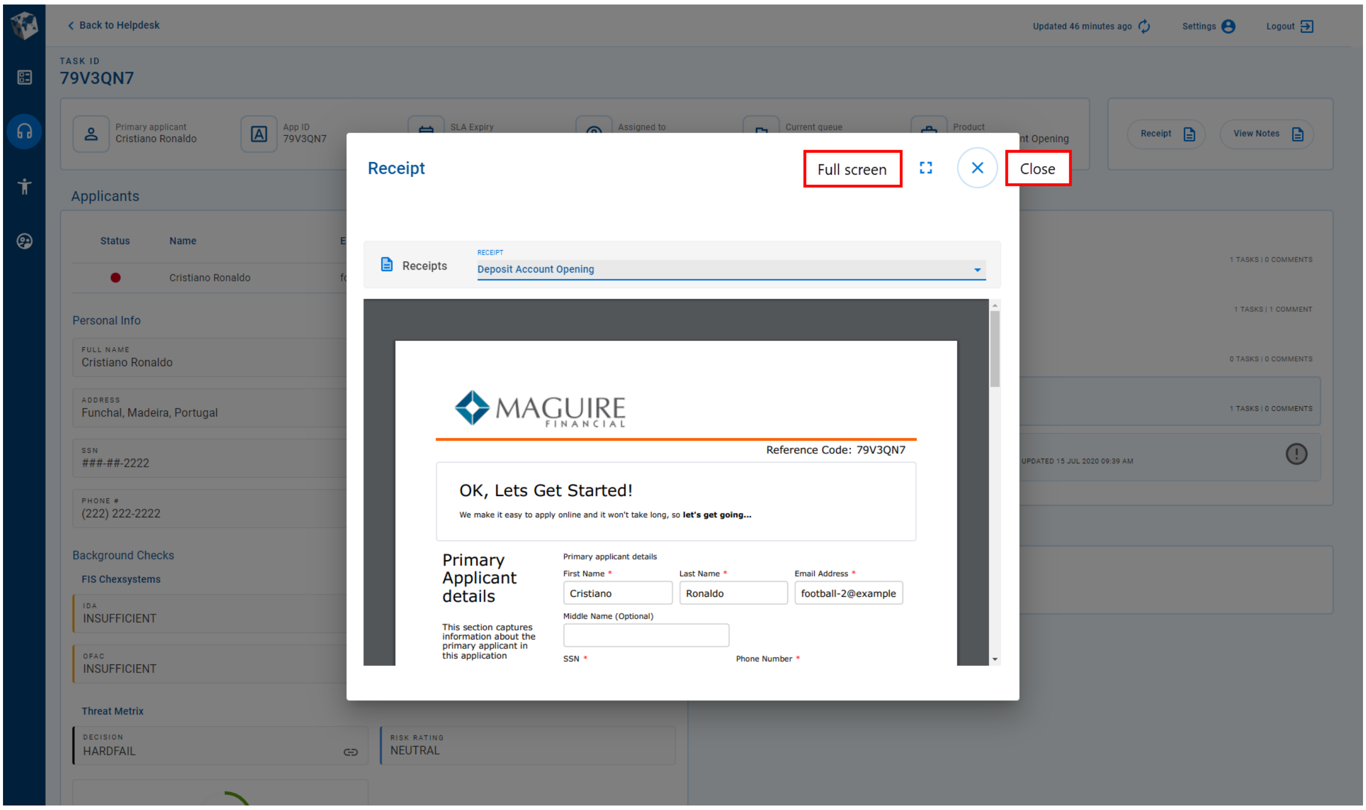
Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

For more information about resuming applications, see Resume – Resume a Saved Application.

View a Receipt

After you've submitted an application, you may want to see the information that was submitted. You can use the Receipt action to view the information for a submitted application.

To resume an application that has been saved but not yet submitted, use the Resume action.



A receipt is a read-only view of the information submitted by the applicant, displayed in the same form that was used to capture that information. Note that a receipt does not allow you to change the application in any way.

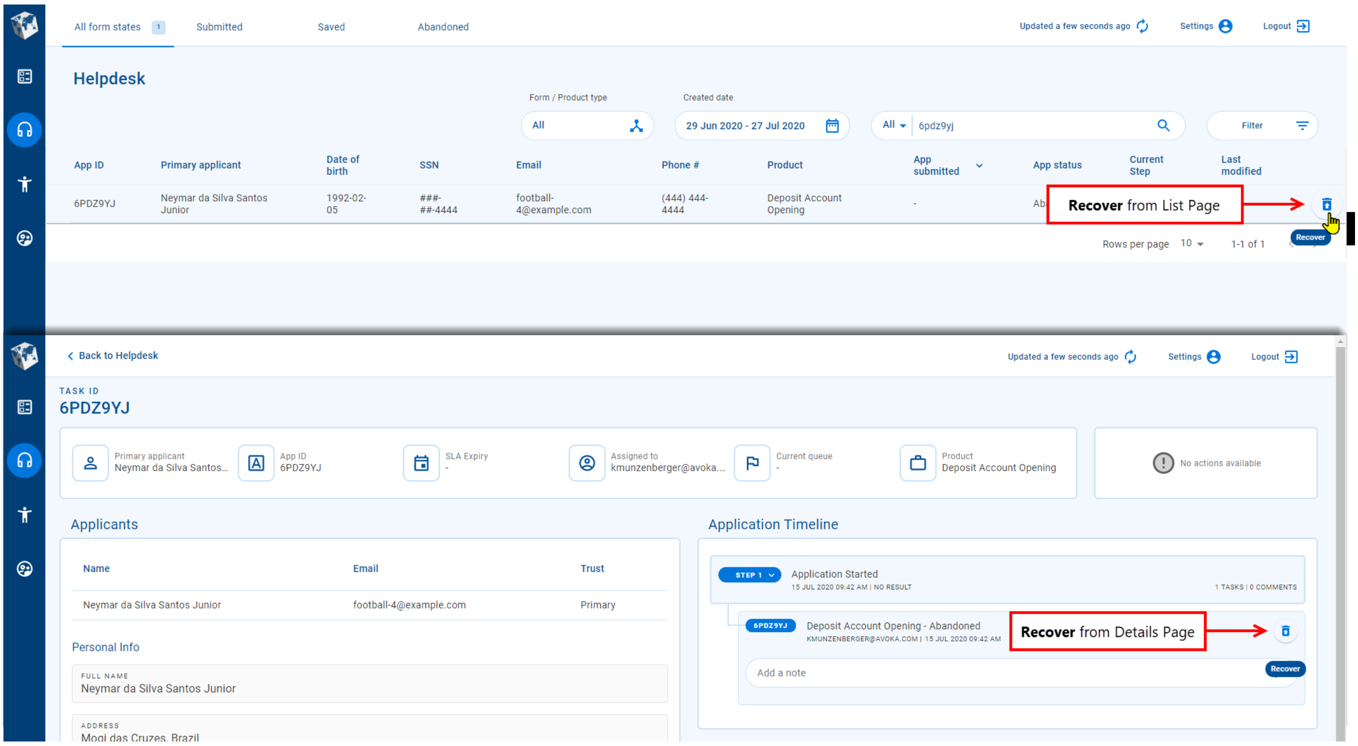
For more information about viewing receipts, see Receipt – View a Receipt.

Recover an Application

Let's say you start an application but your browser crashes before you can save or submit it. Maybe you give up on the application for now, and so it becomes abandoned. A short time later, you decide to complete the application after all. Rest assured, you haven't lost all the information you entered because you can recover your application, then complete and submit it.

> Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

It's easy to recover an application. Go to the Search screen, locate the application to be recovered, then select it to view its Details screen and recover the application from there.



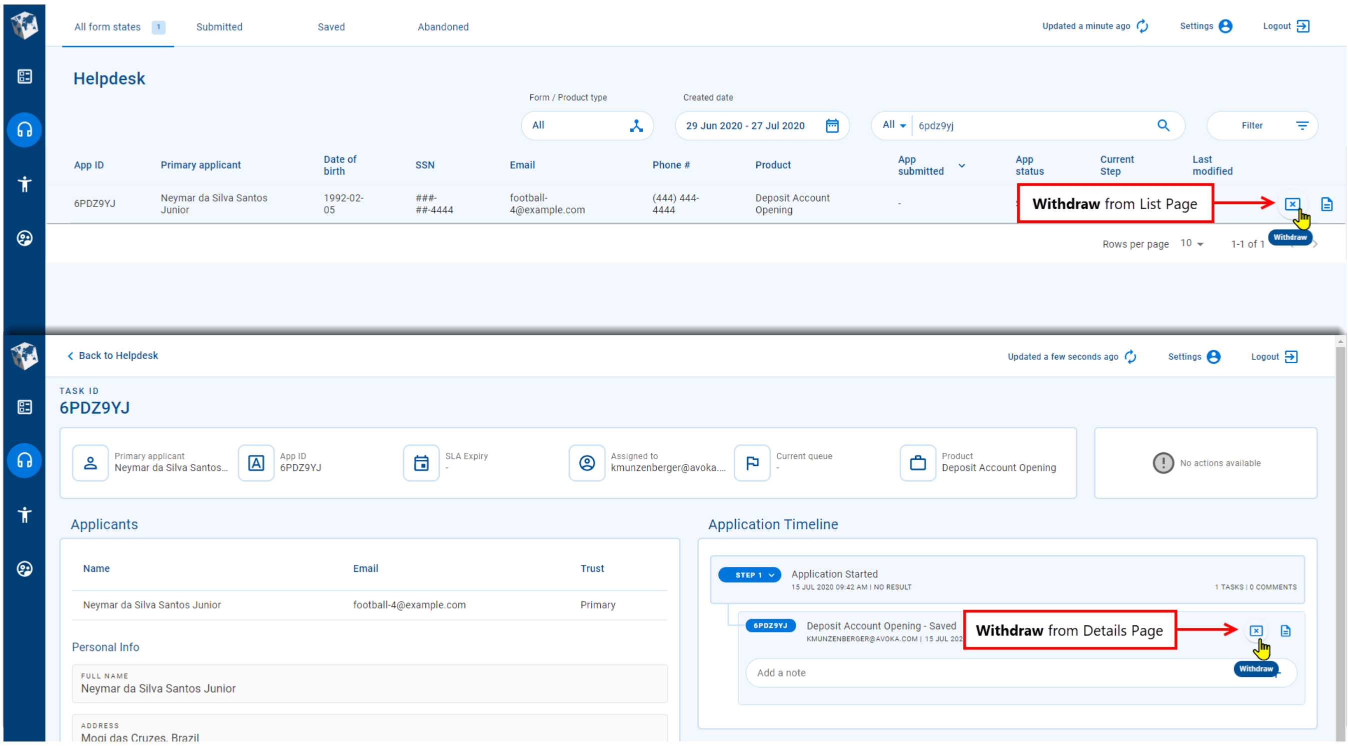
In addition to abandoned applications, an application that has been withdrawn can also be recovered.

For more information about recovering applications, see Recover – Recover an Abandoned Application.

Withdraw an Application

Now, let's say you start an application but, before submitting it, you decide not to proceed with the application after all. You could contact the support helpdesk and ask for the application to be canceled, but you also have the option to withdraw the application yourself.

Just like recovering an application, it's easy to withdraw an application. Go to the Search screen and locate the application to be withdrawn, select it to view its Details screen and withdraw the application from there.



An application that has been withdrawn can subsequently be recovered should you have a change of heart.

For more information about withdrawing applications, see Withdraw – Withdraw an Unsubmitted Application.

Journey Workspaces for Developers

Journey Platform API | Platform Developer | 18.11 | 21.11

Journey Workspaces is a review and approval portal, designed to support resolution and customer service activities for account opening and onboarding. Workspaces enhances the customer experience and improves staff productivity by increasing efficiency and accuracy of the application review process, often a source of onboarding delays and customer dissatisfaction.

Workspaces is an integral module of the Journey Manager (JM) platform, designed and developed from scratch to replace the previous generation Work Space product, adding powerful capabilities based on new JM REST APIs that will enable users to find and manipulate applications quickly.

Below you can find links to Workspaces technical documentation and product releases for current and recent versions.

> If you're not involved in setting up and configuring a Workspaces portal and just want to learn how to use Workspaces, take a look at the Workspaces user documentation.

Current version

This is the latest generally available (GA) version of Journey Workspaces.

v21.11	Documentation	Release Notes

Recent versions

Information is available for the following recent versions of Journey Workspaces.

v21.05	No release	
v20.11	No release	
v20.05	Documentation	Release Notes
v19.11	Documentation	Release Notes
v19.05	Documentation	Release Notes
v18.11	Documentation	Release Notes

Journey Workspaces FAQ

Workspaces | Platform Developer | 18.11 | 20.05

Compatibility

- ### Is Workspaces available for my browser version?

WorkspacesThe Applicant space has been designed for and tested against the following web browsers.

- Google Chrome
- Mozilla Firefox
- Microsoft Edge
- Microsoft Internet Explorer 11 (limited support - see **IE11 Support** below)

For the best experience, we recommend that you use the latest version of Chrome, Firefox, or Edge, and that you keep your browser updated, especially through the application of security patches.

While you may be able to access Workspacesthe Applicant space using other browsers, there's no guarantee that everything will work, and you may not enjoy the great user experience available when using a supported browser. We strongly recommend that you use a supported browser for the best WorkspacesApplicant space experience.

IE11 Support

Workspaces is supported on Internet Explorer 11 (IE11), commencing from Workspaces v18.11.4. Workspaces is feature-compatible with IE11; however, the user experience on IE11 may not be as great as when using a modern browser due to limitations imposed by IE11.

- ### Is there a compatible version of Workspaces for my Journey Manager environment?

Starting with Transact Manager v18.11, a compatible Workspaces release is available for every Journey Manager / Transact Manager release. For example, Workspaces v18.11.0 is compatible with Transact Manager v18.11.0.

Check the release notes for your Workspaces version Workspaces v19.11.x , Workspaces v19.05.x or Workspaces v18.11.x to identify the correct version of Workspaces to use with your Journey Manager platform.

Starting with Workspaces v19.05, Workspaces is forward and backward compatible with supported Journey Manager versions. You can pick the build that is compatible with your platform in the downloads area.

Starting with Workspaces v20.05, the Workspaces client application is deployed as an Open UX application and the Workspaces API (form space) WAR file comes packaged with the Journey Manager installer. For more information, see the Workspaces technical guide .

Deployment

- ### How do I promote Workspaces from lower to higher Journey Manager environments?

Promoting Workspaces between environments is achieved by exporting the Workspaces archive from one environment and importing it into another environment. This transfers the definitions, pages, properties, resources and submission forms associated with the portal.

Before importing the Workspaces archive to your environment, make sure you have already had a fresh installation of Workspaces in that environment.

There is an issue in Workspaces v18.11.3 and earlier releases that prevents you from exporting your Workspaces archive. In this case, to promote your Workspaces portal, install Workspaces in your environment then manually copy the Workspaces assets like properties, pages and resources which are to be replaced.

Starting with Workspaces v20.05, the Workspaces client application is deployed as an Open UX form in Journey Manager. To promote the Workspaces client application from a lower environment to a higher one, export the Workspaces Open UX form (which includes all Workspaces configuration details) and import it into the target environment. No further configuration is required in the target environment.

- ### How do I import the Workspaces WAR file through the Journey Manager administration console?

The Workspaces WAR file is installed using the Journey Manager administration console. Login to Manager then select **Forms > Form Spaces** and click **Import WAR**. For more information about importing WAR files, see Import a Form Space as a WAR archive.

The Import WAR button is disabled in multi-node Journey Manager environments. To install the WAR file, contact cloud hosting support or your infra support to manually deploy the WAR file from the Journey server.

Starting with Workspaces v20.05, the Workspaces API (form space) WAR file comes packaged with the Journey Manager installer.

-

How do I deploy two Workspaces portals in one Journey Manager environment?

To install multiple copies of Workspaces in one Journey Manager environment, you need to change the name of the Workspaces application.

For example, to change the name from “Workspaces” to “Temenos”, you would need to make the following changes to the contents of the Workspaces WAR file.

- **`\WEB-INF\jboss-web.xml`** - change the context root:

```
<jboss-web>
    <context-root>temenos</context-root>
</jboss-web><
```

- **`\Index.htm`** - change the content URL:

```
<html><head><meta http-equiv="Refresh" con-
tent="0;URL=/temenos/secure/index.html"></head></html>
```

- **`\WEB-INF\classes\db-config1.xml`** - change the portal name, context path and WAR file name:

```
<portal name="Temenos">

    <context-path>http://localhost:9080/temenos/</context-path>
    <description><![CDATA[Temenos Workspaces]]></description>
    <version>19.5.0</version>
    <war-file-name>tm-temenos.war</war-file-name>
```

- **`\META-INF\maven\com.avoka.tm\tm-workspaces-war\pom.xml`**

```
<artifactId>tm-temenos-war</artifactId>
<name>TM: Temenos WAR</name>
<packaging>war</packaging>

    <properties>
        <portal>temenos</portal>
        <portal.project.name>Temenos Workspaces</portal.project.name>
        <portal.project.description>Temenos Work-
spaces</portal.project.description>
        <portal.war.file.name>tm-temenos.war</portal.war.file.name>
        <project.context>temenos</project.context>
    </properties>

    <build>
       <finalName>tm-temenos</finalName>
```

- `\META-INF\maven\com.avoka.tm\tm-workspaces-war\pom.properties`

```
groupId=com.avoka.tm
artifactId=tm-temenos-war
```

- `\META-INF\MANIFEST.MF`

```
Specification-Title: TM: Temenos WAR
Implementation-Title: TM: Temenos WAR
```

Rename the WAR file as well as tm-temenos.war.

Once the above changes are done, deploy the new WAR file in the Journey Manager environment.

Can Workspaces v19.05/v19.11 and Workspaces v20.05 be deployed to the same Journey Manager instance?

Yes, you can have multiple different versions of Workspaces in the same instance of Journey Manager. When setting up Workspaces v19.05/v19.11, make sure you select the Workspaces WAR file compatible with your Journey Manager version.

Can I have multiple Workspaces v20.05 Open UX forms in a single Journey Manager instance?

Yes, you can have multiple Workspaces v20.05 Open UX forms in a single Journey Manager instance.

To deploy Workspaces with a different name / version, edit the **`transact-config.json`** file.

```
{
    "buildDir": "build",
    "domainModelFile": "transact-schema.json",
    "appDef": {
        "name": "WorkspacesX",
        "formCode": "workspacesx",
        "clientCode": "workspaces",
        "transactInsights": false,
        "formVersion": {
            "versionNumber": "20.05"
        }
    }
}
```

Fresh installation of Workspaces

- ### When I login to Workspaces for the first time, I just see a progress bar continuously loading

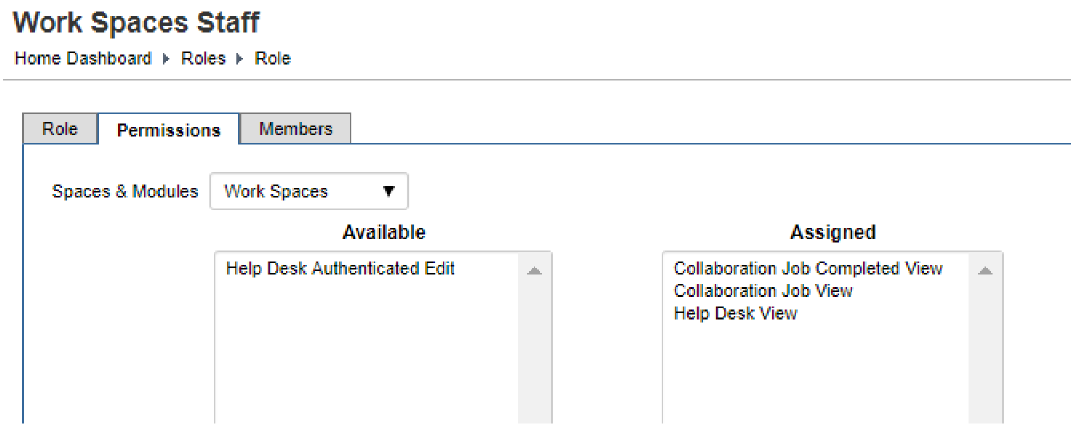
  This happens in the fresh installation of Workspaces v18.11.x due to the missing **space** property after the deployment. Add the default **space** property that comes with the installation package to **Forms > Form Spaces > Work Spaces > Properties** and configure it for your needs.

  > Starting from Workspaces v19.05, the **space** property is refactored into a **Global** property and a set of Space properties, with one Space property for each of the supported spaces such as "Process", "Helpdesk", etc. A configuration with default template properties (for Global and spaces) is included with the WAR file in Workspaces v19.05 release.

- ### What Journey Manager roles and permissions are required to access Workspaces?

  From Workspaces v18.11.3, there is a strict permission check enabled in Workspaces as part of the security enhancement.

  In Workspaces v18.11.x releases, make sure the "Work Spaces Staff" role has the Collaboration Job Completed View, Collaboration Job View and Help Desk View permissions. Assign the "Work Spaces Staff" role to each Workspaces user that needs to access transactions from Journey Manager.



From Workspaces v19.05, you can assign any Journey Manager role to a space in the Workspaces "Global" property in order to restrict access to the spaces to just certain users. Ensure the role has the Collaboration Job Completed View, Collaboration Job View and Help Desk View permissions.

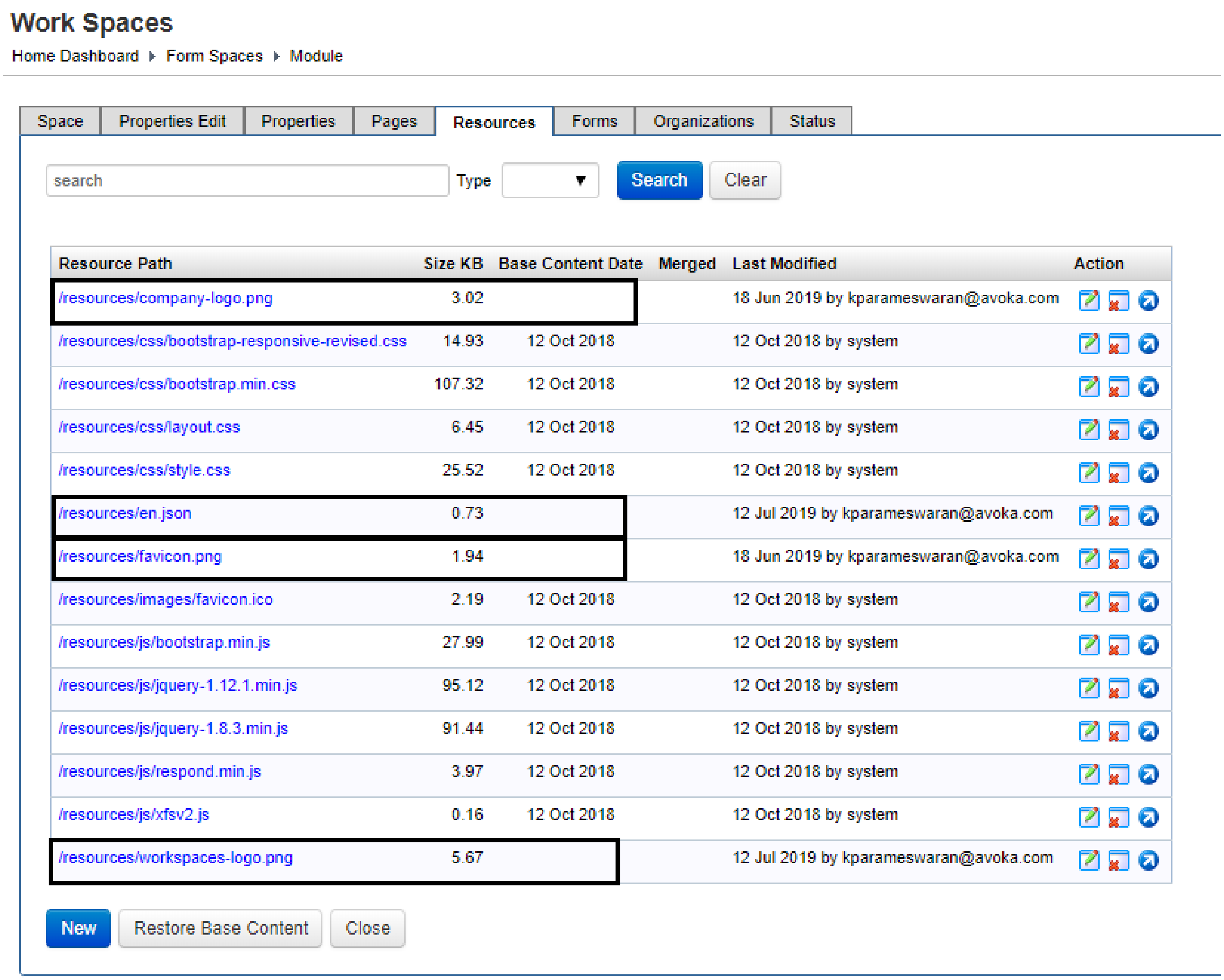
What resources are required by Workspaces after a fresh installation?

The following resources must be added to the Workspaces after a fresh installation.

v20.05 v19.11 / v19.05 v18.11

Starting from Workspaces v20.05, all required resources are included and changed from the IDE. For details refer to the Workspaces technical guide .

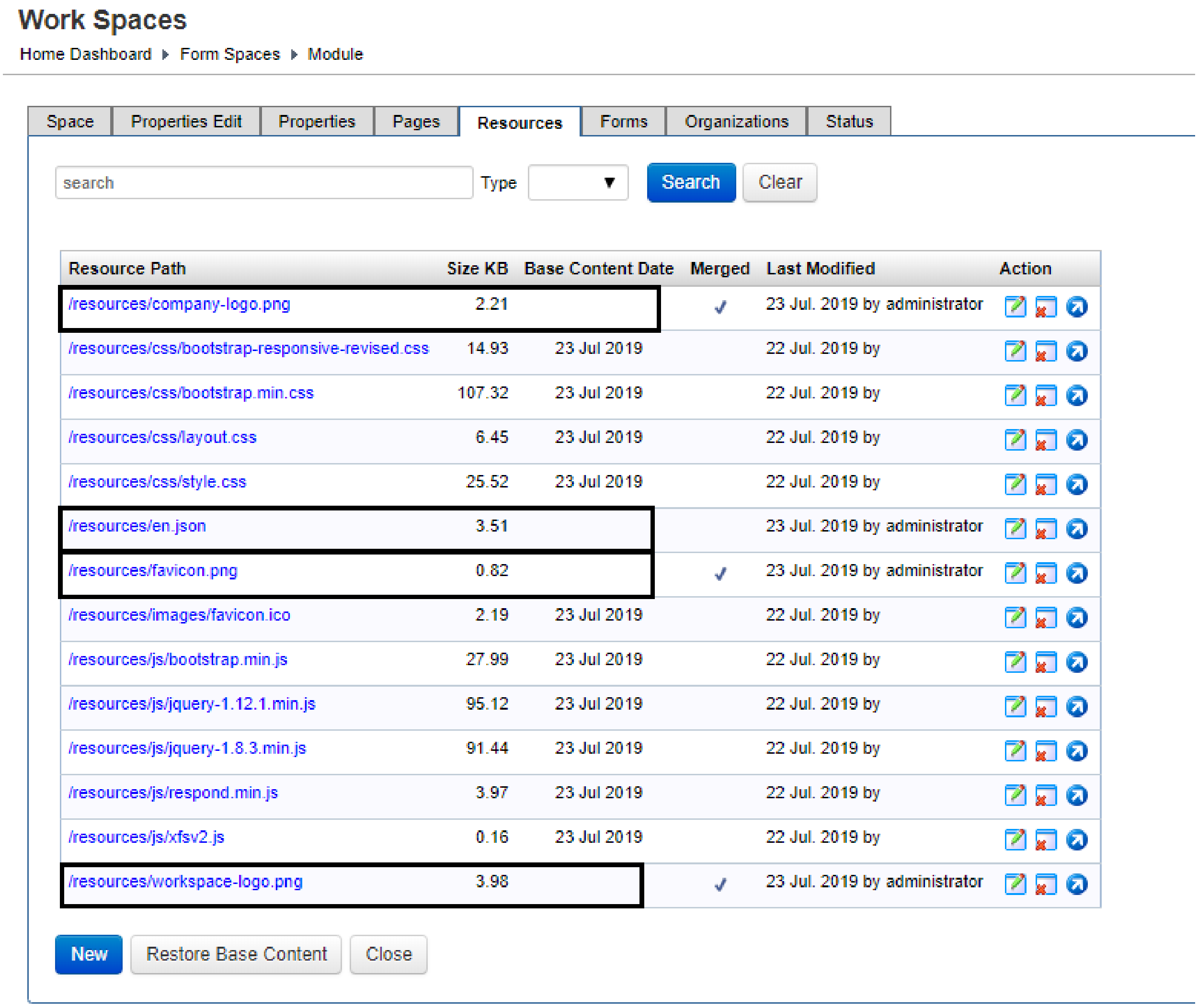
- company-logo.png
- en.json
- favicon.png
- workspaces-logo.png



Resource Path	Size KB	Base Content Date	Merged	Last Modified	Action
/resources/company-logo.png	3.02			18 Jun 2019 by kparameswaran@avoka.com	
/resources/css/bootstrap-responsive-revised.css	14.93	12 Oct 2018		12 Oct 2018 by system	
/resources/css/bootstrap.min.css	107.32	12 Oct 2018		12 Oct 2018 by system	
/resources/css/layout.css	6.45	12 Oct 2018		12 Oct 2018 by system	
/resources/css/style.css	25.52	12 Oct 2018		12 Oct 2018 by system	
/resources/en.json	0.73			12 Jul 2019 by kparameswaran@avoka.com	
/resources/favicon.png	1.94			18 Jun 2019 by kparameswaran@avoka.com	
/resources/images/favicon.ico	2.19	12 Oct 2018		12 Oct 2018 by system	
/resources/js/bootstrap.min.js	27.99	12 Oct 2018		12 Oct 2018 by system	
/resources/js/jquery-1.12.1.min.js	95.12	12 Oct 2018		12 Oct 2018 by system	
/resources/js/jquery-1.8.3.min.js	91.44	12 Oct 2018		12 Oct 2018 by system	
/resources/js/respond.min.js	3.97	12 Oct 2018		12 Oct 2018 by system	
/resources/js/xfsv2.js	0.16	12 Oct 2018		12 Oct 2018 by system	
/resources/workspaces-logo.png	5.67			12 Jul 2019 by kparameswaran@avoka.com	

Sample resources are supplied for each version in the Workspaces download folder.

- company-logo.png
- en.json
- favicon.png
- workspace-logo.png



Resource Path	Size KB	Base Content Date	Merged	Last Modified	Action
/resources/company-logo.png	2.21		✓	23 Jul. 2019 by administrator	
/resources/css/bootstrap-responsive-revised.css	14.93	23 Jul 2019		22 Jul. 2019 by	
/resources/css/bootstrap.min.css	107.32	23 Jul 2019		22 Jul. 2019 by	
/resources/css/layout.css	6.45	23 Jul 2019		22 Jul. 2019 by	
/resources/css/style.css	25.52	23 Jul 2019		22 Jul. 2019 by	
/resources/en.json	3.51			23 Jul. 2019 by administrator	
/resources/favicon.png	0.82		✓	23 Jul. 2019 by administrator	
/resources/images/favicon.ico	2.19	23 Jul 2019		22 Jul. 2019 by	
/resources/js/bootstrap.min.js	27.99	23 Jul 2019		22 Jul. 2019 by	
/resources/js/jquery-1.12.1.min.js	95.12	23 Jul 2019		22 Jul. 2019 by	
/resources/js/jquery-1.8.3.min.js	91.44	23 Jul 2019		22 Jul. 2019 by	
/resources/js/respond.min.js	3.97	23 Jul 2019		22 Jul. 2019 by	
/resources/js/xfsv2.js	0.16	23 Jul 2019		22 Jul. 2019 by	
/resources/workspace-logo.png	3.98		✓	23 Jul. 2019 by administrator	

Sample resources are supplied for each version in the Workspaces download folder.

Logging in to Workspaces

- ### Logging in to Workspaces while already logged in displays the login screen without any styling applied

  This issue was fixed in Workspaces v19.11. This issue affected Workspaces v19.05 and earlier.

- ### When I login to Workspaces again after logging out, an error page is displayed

  This issue was fixed in Workspaces v18.11.4. This issue affected Workspaces v18.11 and earlier.

- ### Can I login to Workspaces from two different browsers (multiple sessions) at the same time?

  Journey Manager allows only one active Workspaces session. You can login to Workspaces on multiple browsers, but only the first browser in which you perform an action will be successful. The second and subsequent browsers in which you attempt an action will report an HTTP **`403 Forbidden`** status code.

Workspaces Configuration

- ### Can the Applicant card or Background Check card be removed from the Workspaces UI?

  Yes, the Applicant card and Background checks card can be removed from the Workspaces UI.

  - To remove the Applicant card: Add an empty **applicants** property inside the space JSON:

  ```
  {
      ...
      "applicants": [ ],
      ...
  }
  ```

  - To remove the Background checks card: Add an empty **integrations** property inside the space JSON:

  ```
  {
      ...
      "integrations": [ ],
      ...
  }
  ```

  From Workspaces v19.11, these cards are integrated into custom cards. More information is available to help you understand how to configure custom cards.

- ## Can the Timeline card or Documents card be removed from the Workspaces UI?

No, it's not possible to remove the Timeline card or Documents card from the Workspaces UI.

- ## How do I configure the views and table columns in the Workspaces List page?

Click one of the links below for more information about how to configure views and table columns in the WorkspacesList page.

- Configure views in Workspaces v20.05
- Configure views in Workspaces v19.11
- Configure views in Workspaces v19.05
- Configure views in Workspaces v18.11

- ## How do I configure the Key info card in the Workspaces Details page?

This feature was introduced in Workspaces v19.05. Click one of the links below for more information about how to configure the Key Info card in the WorkspacesDetails page.

- Configure key info in Workspaces v20.05
- Configure key info in Workspaces v19.11
- Configure key info in Workspaces v19.05

- ## How do I configure the actions to be displayed for each Workspaces space?

This feature was introduced in Workspaces v19.05. Click one of the links below for more information about how to configure the actions available for each space.

- Configure actions in Workspaces v20.05
- Configure actions in Workspaces v19.11
- Configure actions in Workspaces v19.05

- ## How do I hide a step from the application timeline?

This feature was introduced in Workspace v19.05.

To hide a step, configure the **Global** JSON property to include the **`hideSteps`** attribute with the list of steps to be hidden. For example:

```
"hideSteps": ["Helpdesk View"]
```

For more information, refer to the Global configuration in the Workspaces technical documentation.

- ### How do I restrict a Workspaces user to view only certain spaces in the Workspaces application?

Controlling user access to spaces using Journey Manager roles or groups was introduced in Workspaces v19.05.

To restrict a Workspaces user's access to certain spaces, configure the spaces attribute in the **Global** JSON property with a list of roles and/or groups that are configured with the appropriate permissions.

- **Workspaces v20.05** – access to spaces is controlled in TypeScript configuration. For details, see the Workspaces technical guide

- **Workspaces v19.11** – configure the `permissions` attribute

```
"spaces": [
    {
        "label": "Process",
        "icon": "BallotOutlined",
        "value": "Process",
        "permissions": {
            "type": "role",
            "value": ["Processing Staff", "Work Spaces Staff"]
        }
    },
    {
        "label": "Helpdesk",
        "icon": "HeadsetOutlined",
        "value": "Helpdesk",
        "permissions": {
            "type": "role",
            "value": ["Helpdesk Staff", "Work Spaces Staff"]
        }
    }
]
```

  More information is available to help you understand how to configure permissions in the Global configuration.

- **Workspaces v19.05** – configure the `roles` and `groups` attributes

```
"spaces": [
    {
        "label": "Process",
        "icon": "BallotOutlined",
        "value": "Process",
        "roles": ["Processing Staff", "Work Spaces Staff"],
        "groups": ["Manual Review", "Fraud Review", "Error Review"]
    },
    {
        "label": "Helpdesk",
        "icon": "HeadsetOutlined",
        "value": "Helpdesk",
        "roles": ["Helpdesk Staff", "Work Spaces Staff"]
    },
]
```

More information is available to help you understand how to configure permissions in the Global configuration.

-

Are job properties supported in the space JSON configuration for Workspaces?

No, job properties are currently not supported in the **space** JSON configuration for Workspaces.

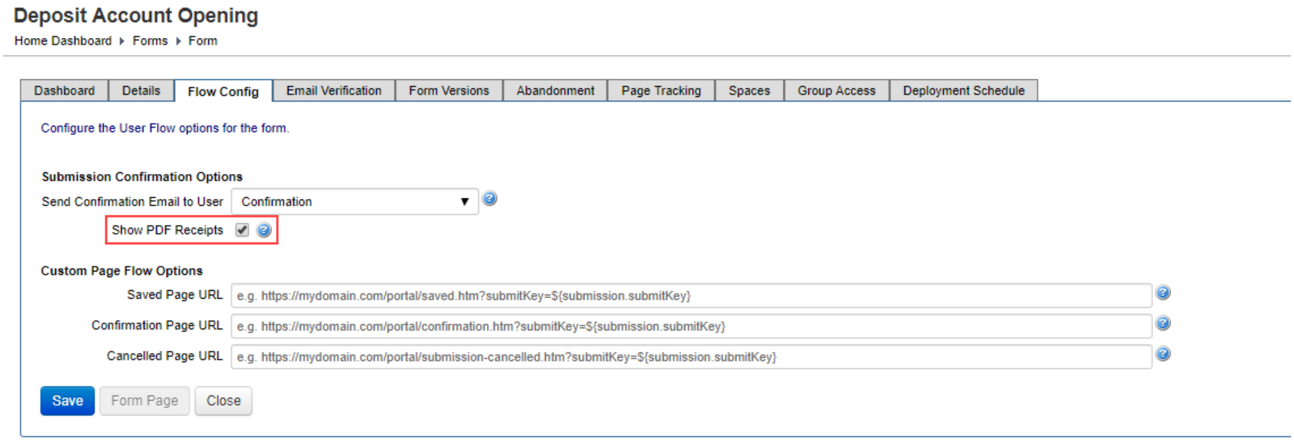
Workspaces Features

-

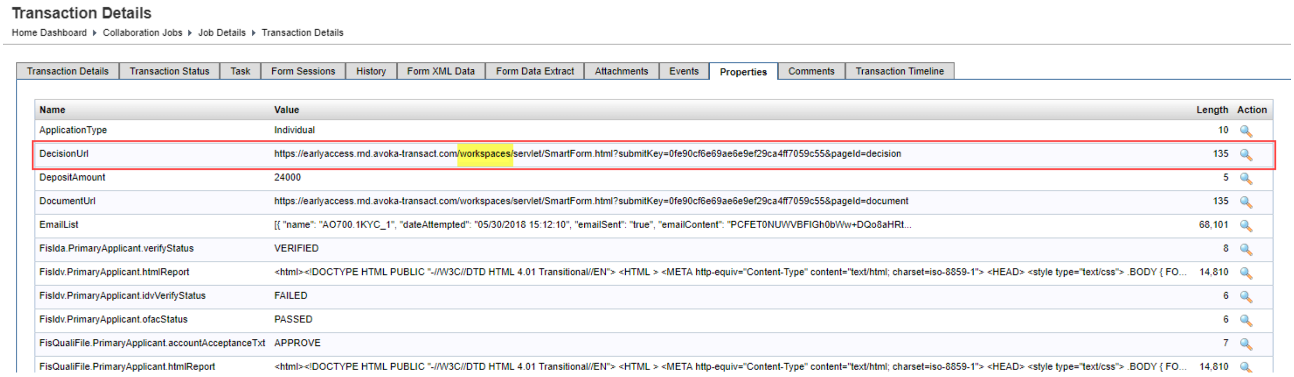
I can't view the PDF receipts – is this due to access restrictions?

This can happen when you click the **Receipt** button in the **Process** view and the message "You are not authorized to access this resource." is displayed.

Make sure **Show PDF receipts** is selected for the form associated with the transaction. This option is available on the form's **Flow Config** tab. Form more information about this option, seeConfigure Receipts Delivery Mode.



In addition, if you are running Workspaces v18.11.x, make sure the **`receiptUrl`** property is present in the transaction's **`submission`** property and the context path is pointing to **`/workspaces/`**.

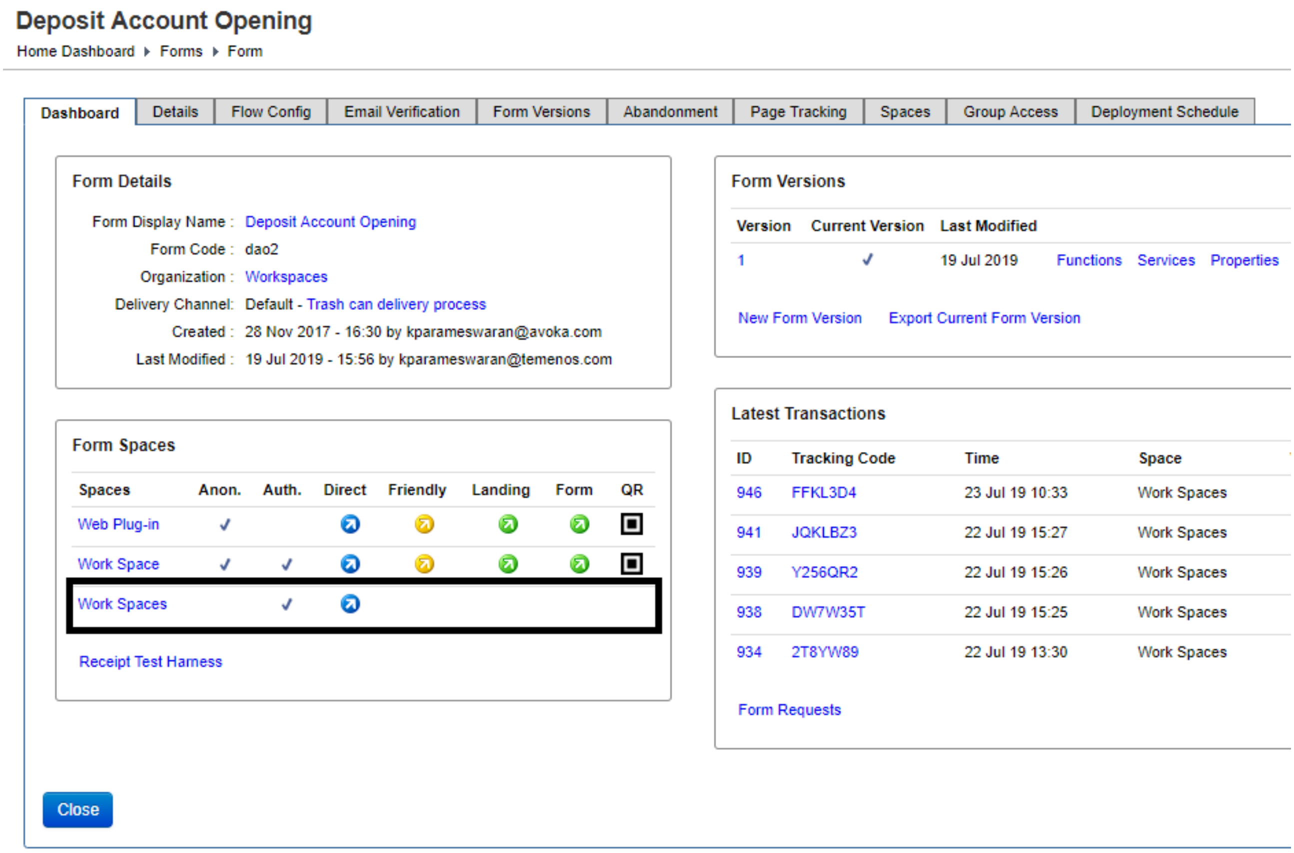


Searching for a transaction is very slow when there is a huge volume of transactions in Journey Manager

Enhanced search performance is available starting with Workspaces v19.05.8 and Workspaces v19.11.6, and in all later versions. To improve search performance, add the "Enhanced PII Search" portal property and set it to true. For details, see the Workspaces technical guide .

I can't view certain transactions in Workspaces

Make sure the form related to the transaction is linked to the "Work Spaces" form space in Journey Manager.



- ### Filtering on more than two submission properties at once does not return the expected results

  This is now supported in Workspaces v19.11. This issue affected Workspaces v19.05 and earlier.

- ### Does Workspaces support partial searches?

  No, partial search is not supported in Workspaces.

- ### I can't filter on an application's metadata after the application is completed

  Make sure **PII Search Purge Mode** is set to **PII Purge Time** for the Data Retention Management service in Journey Manager under **Services > All Services**.

> Filtering on an application's metadata will work until the **PII Purge Time** is elapsed

- ## When I try to change or reset my password, I can't enter my old password

  This issue was fixed in Workspaces v19.11.7 / v19.05.9. if the feature does not work even after upgrading Workspaces, click **Restore base content** on the **Pages** tab of the Workspaces form space in Journey Manager.

- ## The Decision action button is still visible after the application is approved or rejected

  If you are using a custom decision form that needs to communicate with Workspaces, you need to call the browser's POST message API to pass messages back to Workspaces. Add the following code to the **Submit** button's click event.

  - If there are justification comments to pass to Workspaces:

  ```
  window.parent.postMessage({ submit: data.typeANote }, '*');
  ```

  - If there aren't any justification comments to pass to Workspaces:

  ```
  window.parent.postMessage({ submitDecision: true }, "*")
  ```

- ## How do I pass the Workspaces locale to a form rendered in the Workspaces modal window (for example, the decision form)?

  This feature is supported starting from Workspaces v19.11.7. To retrieve the locale from the browser's event, use the following JavaScript code.

  ```
  window.addEventListener('message', function(event) {
      console.log(event);
      locale = event.data.locale;
  }, false)
  ```

- ## How do I close the Workspaces modal window from a form rendered inside it (for example, the decision form)?

  This feature is supported starting from Workspaces v19.11.7. To close the modal window from the form, use the following code in the form.

```
window.parent.postMessage({close: true}, '*');
```

-

Does Workspaces v20.05 support role-based access to view custom cards?

Yes, Workspaces v20.05 supports role-based access control to view custom cards. For details, see the Workspaces technical guide .

-

Is there a limit on the number of notes that can be added to a task or application in Workspaces?

There is no limit on the number of notes that can be added to a task or application in Workspaces. However, each note's message must not exceed 2000 characters in length.

-

Can I hide the Search bar on the Workspaces list page?

No, it’s not possible to hide or suppress the Search bar in the Workspaces list screen. However, starting from Workspaces v20.05, it is possible to specify the search scope in Workspaces by adding the following attribute to the current space configuration:

```
search: [<field name 1>, <field name 2> …],
```

-

Is it possible to retain search and filter values throughout a user's Workspaces session?

Yes, this is supported starting from Workspaces v20.05.

-

If I start a form in the Workspaces Assisted Channel, can I hand it over to the customer / applicant to continue the journey?

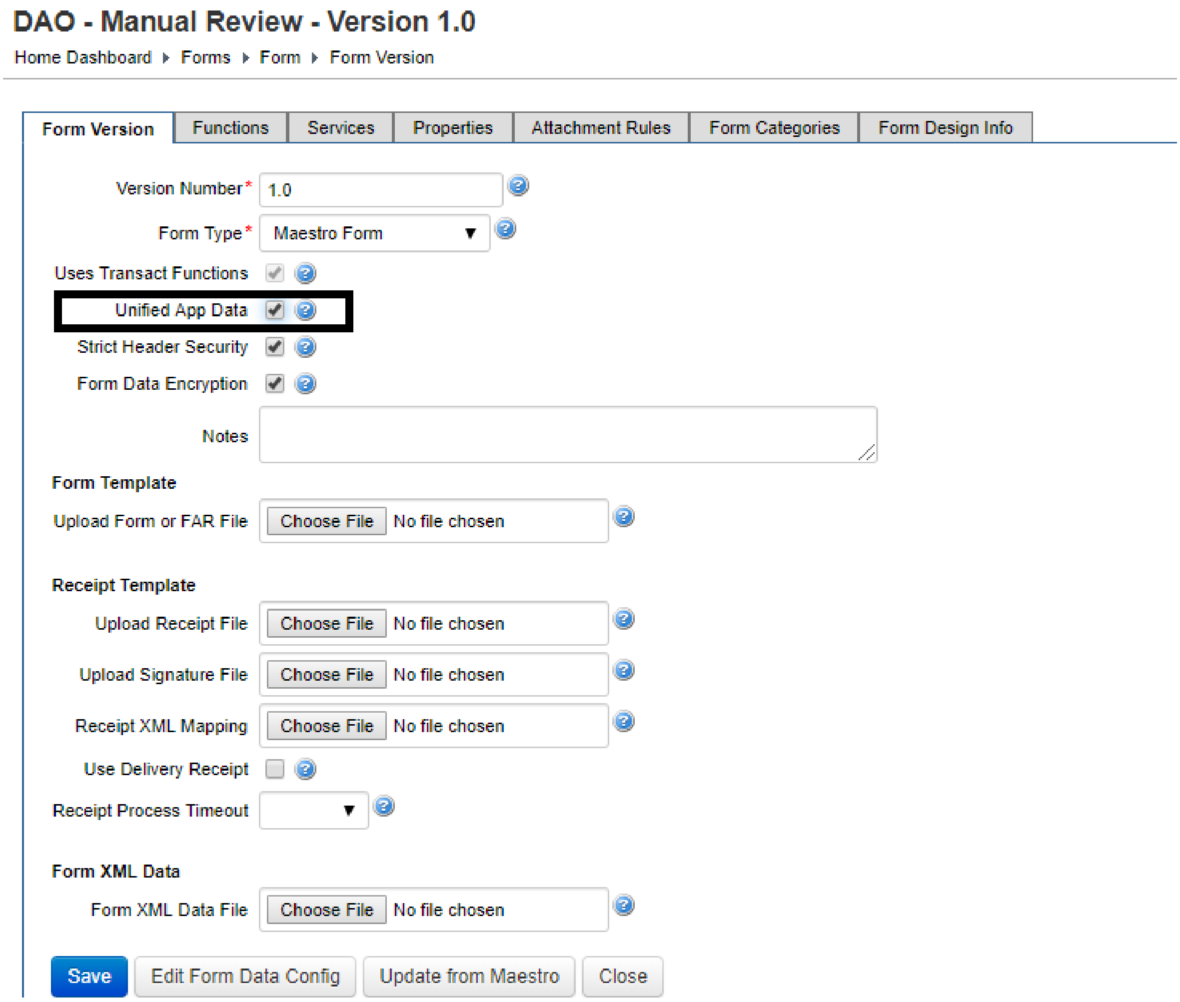
No, this workflow is not possible in Workspaces due to reasons relating to security.

However, this can be achieved by breaking the application form into sections that are bundled with a collaboration job to manage the workflow.

Maestro form in Workspaces

- ## The Decision form cannot read the SystemProfile property

  Make sure **Unified App Data** is selected for the review form.



- ## The Add documents button doesn't appear for applications that are not yet submitted

  The **Add documents** button is visible only during the review stages for those who are assigned to review the application. For inflight applications (prior to submission), you can use the **View Form** button to render the form which may allow you to upload documents.

  Starting with Workspaces v19.11, Workspaces supports controlling the **Add documents** button through configuration. More information is available to help you understand how to configure attachments such as documents.

- ### Can I configure Workspaces so that Helpdesk users view saved forms in a read-only state?

  Saved forms can be rendered in a read-only state by clicking **View Form**, as long as the form is designed to activate the contents in a read-only state upon receiving the **`&read_only`** parameter in the URL while rendering the form.

  Workspaces v19.11 now supports passing messages using the postMessage API. For details, see the Workspaces technical guide .

- ### How do I configure Workspaces so that Assisted Channel users can fill out a Maestro form?

  This feature was introduced in Workspaces v19.05.

  For information about how to configure Workspaces to allow **Assisted Channel** users to fill out a Maestro form, click one of the links below.

  - Configure this feature in Workspaces v20.05
  - Configure this feature in Workspaces v19.11
  - Configure this feature in Workspaces v19.05