temenos

Workspaces

JOURNEY MANAGER

VERSION 22.10

TOC

Journey Workspaces Overview

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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 Manager 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 Applicants space offers a self-service portal for managing application creation, follow-ups, and keeping track of application progress.

To learn more about the Workspaces Applicants space, see Workspaces Applicants Space Overview, The Applicants Space Search Screen, and The Applicants 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

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

- Google Chrome
- Mozilla Firefox

- Microsoft Edge

NOTE

Journey Workspaces support for Internet Explorer is discontinued. For details, see Update on TJM Support for IE11.

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 Journey 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 Journey Workspaces experience.

What's new?

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

- 22.10
- 22.04
- 21.11
- 20.05
- 19.11
- 19.05
- 18.11

Key features included in this release:

- **Improved UI and UX:** A fresh new user interface for improved user experience.
- **Support for white-label themes:** Allows dynamic branding based on the logged-in user.
- **Space Grouping:** Group related spaces under the new hamburger menu which also shares reusable configurations.
- **Custom Card Grouping:** Improved custom cards that now allow several custom cards to be grouped within tabs.
- **Fluent Functions:** Native support for invoking Fluent Functions in Workspaces; available for custom actions, custom card links, and as a data source for custom cards.

- **Bulk Actions**: Perform a bulk operation of several commonly used actions: claim, release, assign, reassign, withdraw, and recover.
- **Reassign Tasks**: Reassign tasks without needing to unassign them first.
- **Timeline Stepper:** A new timeline stepper feature that provides a tramline view of application progress.
- **Tooltips:** Tooltips are now supported to display additional information on the List screen's table and in the Details screen's key info card.
- **Improved Modal Window**: Enhanced with an optimized content viewing area, and an option to open forms in a new browser tab.
- **Rules Support:** Configuration now supports rule definitions to control the display of custom actions, custom cards, and the upload attachments button.
- **Material Icons:** Use any Material icons in Workspaces and Journey Applicants configurations.
- **Additional Data Sources:** Configure the Workspaces Details screen using data from the initial transaction's properties, Fluent Functions, and job properties in addition to the current transaction's metadata.
- **On-screen Configuration Editor:** A new **experimental** feature to edit Workspaces configurations from the Workspaces UI and preview the changes.

Here's what's new and improved in Workspaces 22.04.

construction	Improved build and deployment process	Improved version control in Product Artifactory that allows easy access to a specific Workspaces release.
admin_panel_settings	Operations Space	A brand-new Operations portal that allows operations staff and administrators to search and view TJM transactions when providing operational assistance to banks and their customers.
picture_in_picture_alt	Theme support in Applicant space	Apply a theme to the Applicant space to match bank branding and color schemes.
speaker_notes	Notes feature in Applicant space	A new notes feature in the Applicant space that allows applicants to communicate directly with bank staff for assistance during the application process.
search	Search improvements	Improvements to the Workspaces search feature, allowing the user to return to the parent view quickly after completing a search.

view_ timeline	Timeline improvements	Improvements to the Application timeline feature to filter out tasks or transactions that are not required.
speaker_ notes	Notes improvements	Improvements to the Workspaces notes feature to make it easier for bank staff to communicate with applicants in the Applicant space.
build_circle	Migration to new automation framework	Migration from the old web driver framework to the Nightwatch framework for API, config, and UI automation.

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.

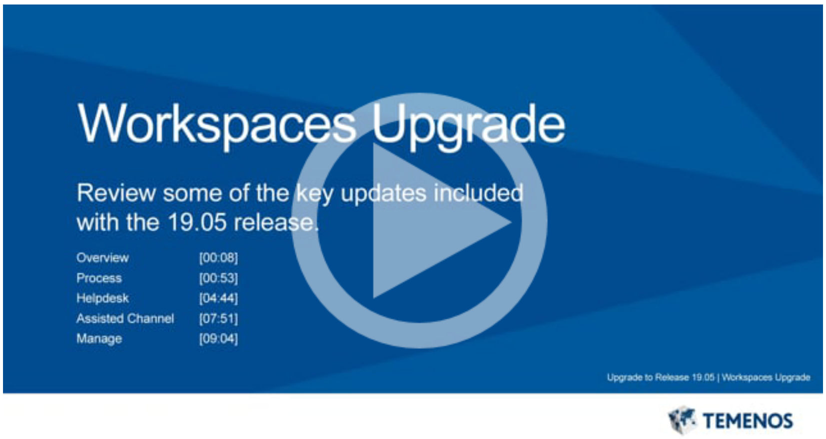
Here's what's new and improved in Workspaces 20.05.

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 configurations	Improved custom card configuration including permission control and an option to hide empty/null data.

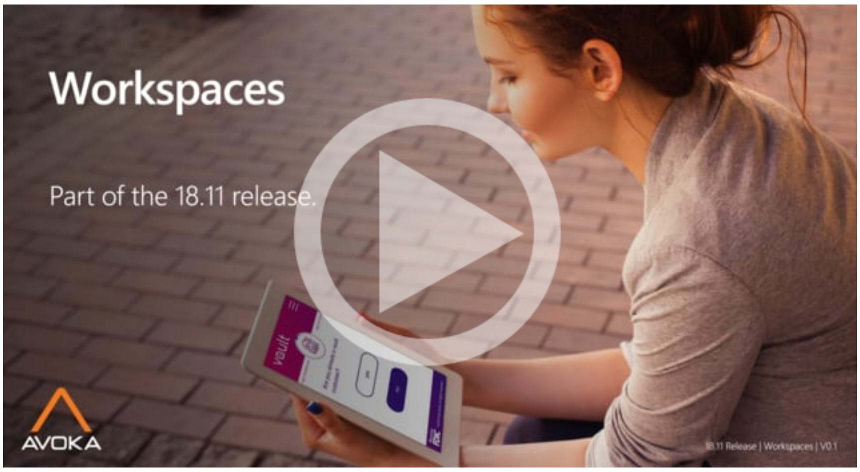
Improved session logout	Automatic session logout after a defined period of inactivity.
Date picker enhancements	Enhancements to the date picker to support single date selection and custom date formats.
Enhanced search/filter behavior	New search/filter behavior on the List pages: the latest search/filter is retained in each space until cleared or the session ends.
Enhanced application assignment	The assignee full name is displayed when assigning a task to a user.
Enhanced application listing	An enhanced view configuration extending control over line wrapping in data tables.
Enhanced documents 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.



Journey Workspaces Features

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

Journey Workspaces comes packed with a wide range of features empowering you to improve your customers' experience with onboarding assistance, rapid application resolution, and communication of progress, regardless of the channel they are applying from. Out of the box, Workspaces includes the features you need to accomplish your business objectives.

Main Features

- **Review:** Review capabilities for pending applications that need manual action.
- **Helpdesk:** Support staff can quickly and easily find any application to provide assistance.
- **Assist:** Assisted channel staff can kick start the application process and monitor progress.
- **Manage:** Task management capabilities for managers and supervisors.
- **Applicants:** A self-service portal where authenticated applicants can manage applications.

Features by Release

Each release of Journey Workspaces has new features, enhancements, and bug fixes to provide you with the best-in-class software and to accelerate business agility and improvements across the board. The key features for each major Workspaces release are listed below.

Journey Workspaces 22.10

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 22.10.

Key features included in this release:

- **Improved UI and UX:** A fresh new user interface for improved user experience.
- **Support for white-label themes:** Allows dynamic branding based on the logged-in user.
- **Space Grouping:** Group related spaces under the new hamburger menu which also shares reusable configurations.
- **Custom Card Grouping:** Improved custom cards that now allow several custom cards to be grouped within tabs.
- **Fluent Functions:** Native support for invoking Fluent Functions in Workspaces; available for custom actions, custom card links, and as a data source for custom cards.

- **Bulk Actions**: Perform a bulk operation of several commonly used actions: claim, release, assign, reassign, withdraw, and recover.
- **Reassign Tasks**: Reassign tasks without needing to unassign them first.
- **Timeline Stepper:** A new timeline stepper feature that provides a tramline view of application progress.
- **Tooltips:** Tooltips are now supported to display additional information on the List screen's table and in the Details screen's key info card.
- **Improved Modal Window**: Enhanced with an optimized content viewing area, and an option to open forms in a new browser tab.
- **Rules Support:** Configuration now supports rule definitions to control the display of custom actions, custom cards, and the upload attachments button.
- **Material Icons:** Use any Material icons in Workspaces and Journey Applicants configurations.
- **Additional Data Sources:** Configure the Workspaces Details screen using data from the initial transaction's properties, Fluent Functions, and job properties in addition to the current transaction's metadata.
- **On-screen Configuration Editor:** A new **experimental** feature to edit Workspaces configurations from the Workspaces UI and preview the changes.

Journey Workspaces 22.04

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 22.04.

Key Features	Description
Improved build and deployment process	Improved version control in Product Artifactory that allows easy access to a specific Workspaces release.
Operations Space	A brand-new Operations portal that allows operations staff and administrators to search and view TJM transactions when providing operational assistance to banks and their customers.
Theme support in Applicant space	Apply a theme to the Applicant space to match bank branding and color schemes.
Notes feature in Applicant space	A new notes feature in the Applicant space that allows applicants to communicate directly with bank staff for assistance during the application process.
Search improvements	Improvements to the Workspaces search feature, allowing the user to return to the parent view quickly after completing a search.

Key Features	Description
Timeline improvements	Improvements to the Application timeline feature to filter out tasks or transactions that are not required.
Notes improvements	Improvements to the Workspaces notes feature to make it easier for bank staff to communicate with applicants in the Applicant space.
Migration to new automation framework	Migration from the old web driver framework to the Nightwatch framework for API, config, and UI automation.

Journey Workspaces 21.11

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 21.11.

Key Features	Description
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 UI language within Workspaces, and other minor enhancements to the localization framework.
Search improvements	Configure the search feature to include fields that are not part of the item list data.

Journey Workspaces 20.05

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 20.05.

Key Features	Description
Improved build and deployment process	An improved build and deployment process for Workspaces that supports seamless integration to your dev-ops practices such as CI/CD.
Task-specific actions	Task-specific actions are presented alongside each task in an application to give you confidence you're acting on the right task.

Key Features	Description
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 configurations	Improved custom card configuration including permission control and an option to hide empty or 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 and filter behaviour on the List pages, with the latest search/filter retained in each space until cleared or the session ends.
Enhanced application assignment	The assignee full name is displayed when assigning a task to a user.
Enhanced application listing	An enhanced view configuration, extending control over line wrapping in data tables.
Enhanced documents panel	Attachment name is now included for each item in the Documents panel.

Journey Workspaces 19.11

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 19.11.

Key Features	Description
Multi-applicant / multi-product interface	An improved interface for viewing applications with multiple applicants and products.
Workspaces actions	Enhancements to the supported actions, now offering custom actions and permission control.
Withdraw an application	The ability to withdraw a saved application from Workspaces.
Recover an application	The ability to recover an abandoned application from Workspaces.
Console error report-	Detailed console reporting of configuration errors that eases the effort

Key Features	Description
ing	required by solution builders when debugging configuration issues.
Application SLA	The ability to add a visual indicator in the application listing screen to keep track of crucial service indicators like application SLA.
Documents card	An enhanced documents card interface and configuration that supports options to include or exclude certain documents using pattern matching.
Templates	Improved out-of-the-box templates for processing staff, helpdesk staff, assisted channel staff, and manager personas.

Journey Workspaces 19.05

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 19.05.

Key Features	Description
Role based spaces	An improved interface for viewing applications with multiple applicants and products.
Task management	Enhancements to the supported actions that now offers custom actions and permission control.
Kickstart applications	The ability to withdraw a saved application from Workspaces.
Key Info card	The ability to recover an abandoned application from Workspaces.
Multi applicant support	Detailed console reporting of configuration errors that eases the effort required by solution builders to debug configuration issues.
Application Timeline	The ability to add a visual indicator in the application listing screen to keep track of crucial service indicators like application SLA.
Documents card	An enhanced documents card interface and configuration that supports options to include or exclude certain documents using pattern matching.
Templates	Improved out-of-the-box templates for processing staff, helpdesk staff, assisted channel staff and manager personas.

Journey Workspaces 18.11

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 18.11.

<table>
<tr><th>Key Features</th><th>Description</th></tr>
<tr><td>Views</td><td>A view is a pre-created filter that allows agents to get to the tasks that they must work on quickly.

Views offer the following benefits:
An efficient way to keep track of pending applications that need to be processed.
High visibility on the applications that enter and exit task queues.
Reduce overall time to find the tasks that need to be processed.</td></tr>
<tr><td>Filters</td><td>Views can be further refined to support the needs of processing agents by filtering and/or sorting on specific task list columns.

Filters offer the following benefits:
Augment a view's pre-configured criteria.
Allows further narrowing down on search criteria.
Specify multiple filter conditions to hone in on specific applications.</td></tr>
<tr><td>Applicant Info</td><td>Applicant info summarizes the key information about the applicants.

Applicant Info offer the following benefits:
A simple summary about the applicants in an application.
See key applicant details like name and phone number at a glance.
Easily differentiate between applications with a single applicant or joint applicants.</td></tr>
<tr><td>Background Checks</td><td>Validation results from third-party services can be seamlessly integrated and viewed in Transact Workspaces.

Background Checks offer the following benefits:
Summarise the results from integrated third-party services.
Visual indicators that aid in identifying the actions required on pending applications.</td></tr>
<tr><td>Application</td><td>A simple application timeline with the ability to add and review notes.</td></tr>
</table>

Key Features	Description
Timeline	The Application Timeline offers the following benefits: • A streamlined way to track the stages that an application has completed. • A space for processing agents to add and review notes about the application.
Attached Documents	Add and review the attached documents captured at various application stages. Attached Documents offer the following benefits: • A centralized place for reviewing documents attached to the application at various stages. • Attach additional supporting documents while reviewing the application.

Workspaces core concepts

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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 This feature was introduced in 19.11.
- Queues
- Views
- Access Control

Roles and spaces

Roles and spaces are used together in Workspaces to define workflow solutions for various purposes.

- A **Role** represents a responsibility you might have or a job you need to do, aligned with a specific user type. Roles control user access to various Workspaces features (including spaces).
- A **Space** is a configuration of Workspaces features, such as queues, views and filters.
- Several spaces can be grouped together under a **Space Group** which imposes common access permissions to all spaces under it.

Workspaces has been designed with several default spaces, each of which is associated with a role and configured with features to facilitate the actions required to fulfill the space's intended purpose.

Space	Used by (Role)	Description
Task Review†	Processing staff	Offers review capabilities for pending applications that need manual action.
Document Requests†	Processing staff	Offers review capabilities for tasks assigned to customers and which require their action.
Helpdesk	Helpdesk staff	Find applications quickly and easily to provide prompt and

Space	Used by (Role)	Description
		accurate customer assistance.
Assisted Channel	Relationship managers	Kick start the application process on behalf of customers, and monitor application progress.
Manage	Managers and supervisors	Provides task management capabilities.
Applicants	Applicants	Allows applicants and their representatives to interact with applications through to completion.

† By default, the Task Review and Document Requests spaces are group together under a **Process** space group.

The default Workspaces configuration caters for bank staff in various roles, and includes all of these spaces except the Applicants space. A separate Workspaces portal for use by applicants and their authorized representatives is often configured with just the Applicants space. Regardless of how Workspaces is configured, only authenticated users can access it, and you'll only see those spaces that are accessible to you.

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).

NOTE

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.

NOTE

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

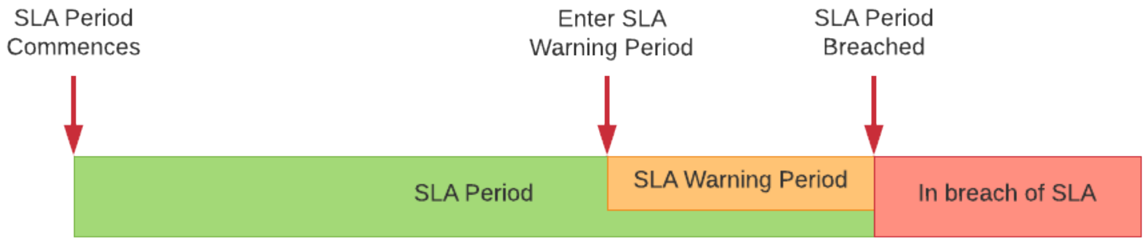
Service level agreement (SLA)

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.

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.

[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.



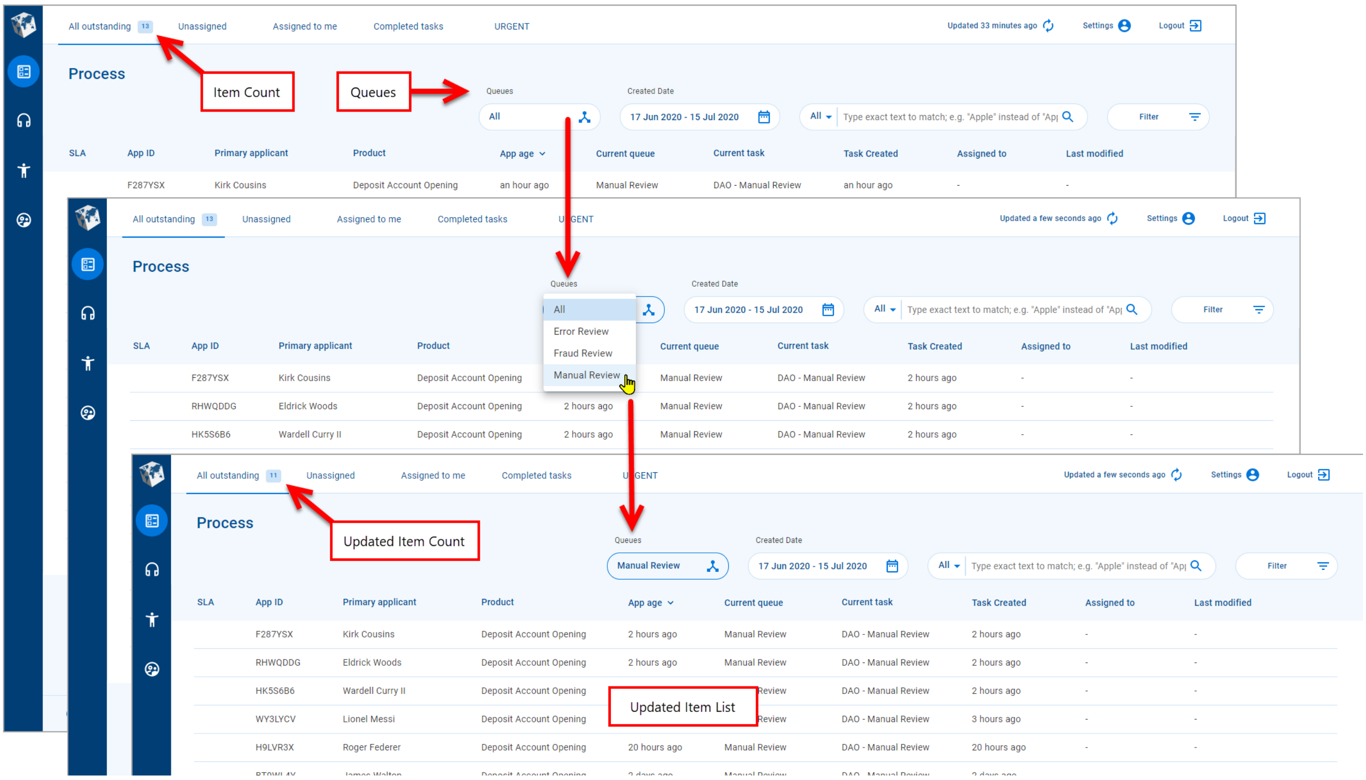
You can easily monitor the progress of applications against an SLA using the SLA Expiry field in the Key Info card on the Details screen. Also, in the Task Review space and Manage spaces, there's a graphical SLA indicator in the item list that provides an overview of application processing progress at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

Queues

The default configuration of the Task Review 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 screen 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 screen 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
All outstanding
Unassigned
Assigned to me
Completed tasks
URGENT
Settings
Logout
Process
Queues
Created Date
17 Jun 2020 - 15 Jul 2020
Filter
SLA
App ID
Primary applicant
Product
App age
Current queue
Current task
Task Created
Assigned to
Last modified
All
Error Review
Fraud Review
Manual Review
F287YSX
Kirk Cousins
Deposit Account Opening
RHWQDDG
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Wardell Curry II
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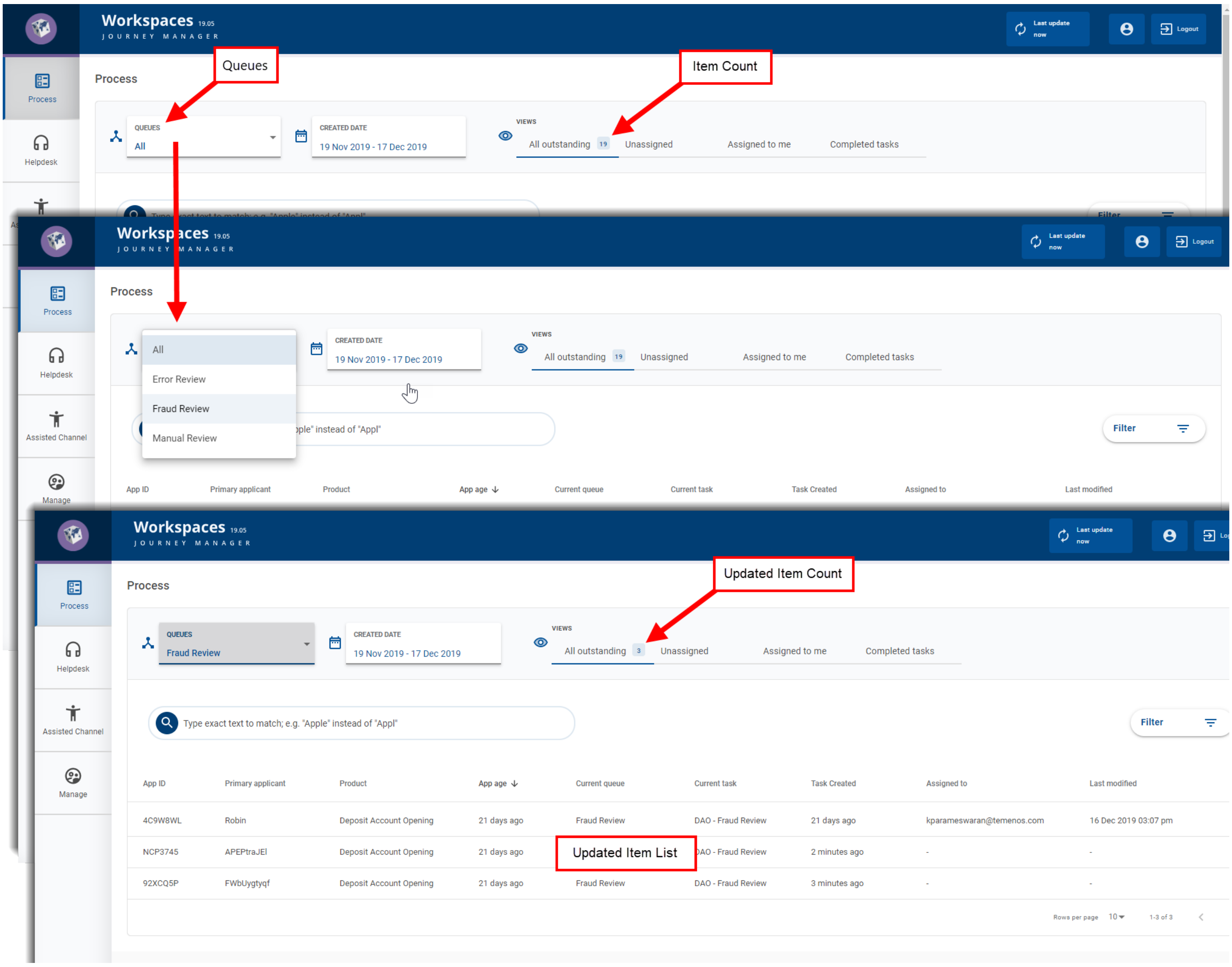
Roger Federer
DAO - Manual Review

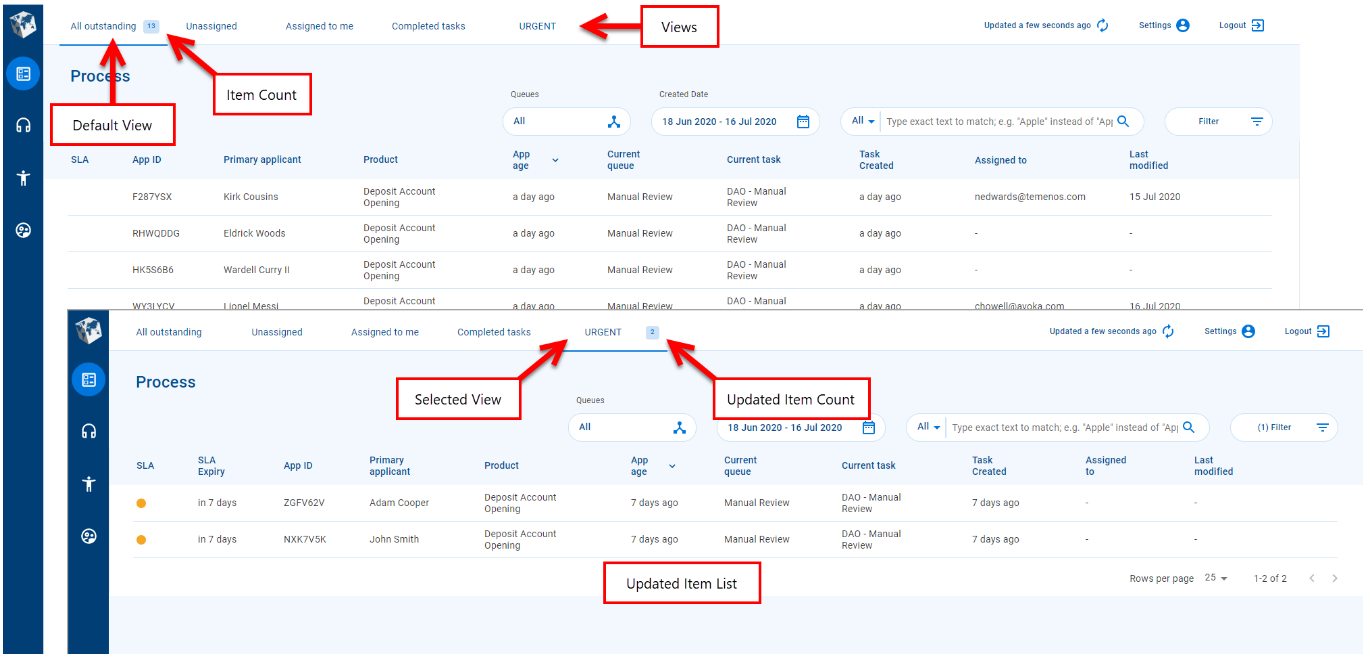


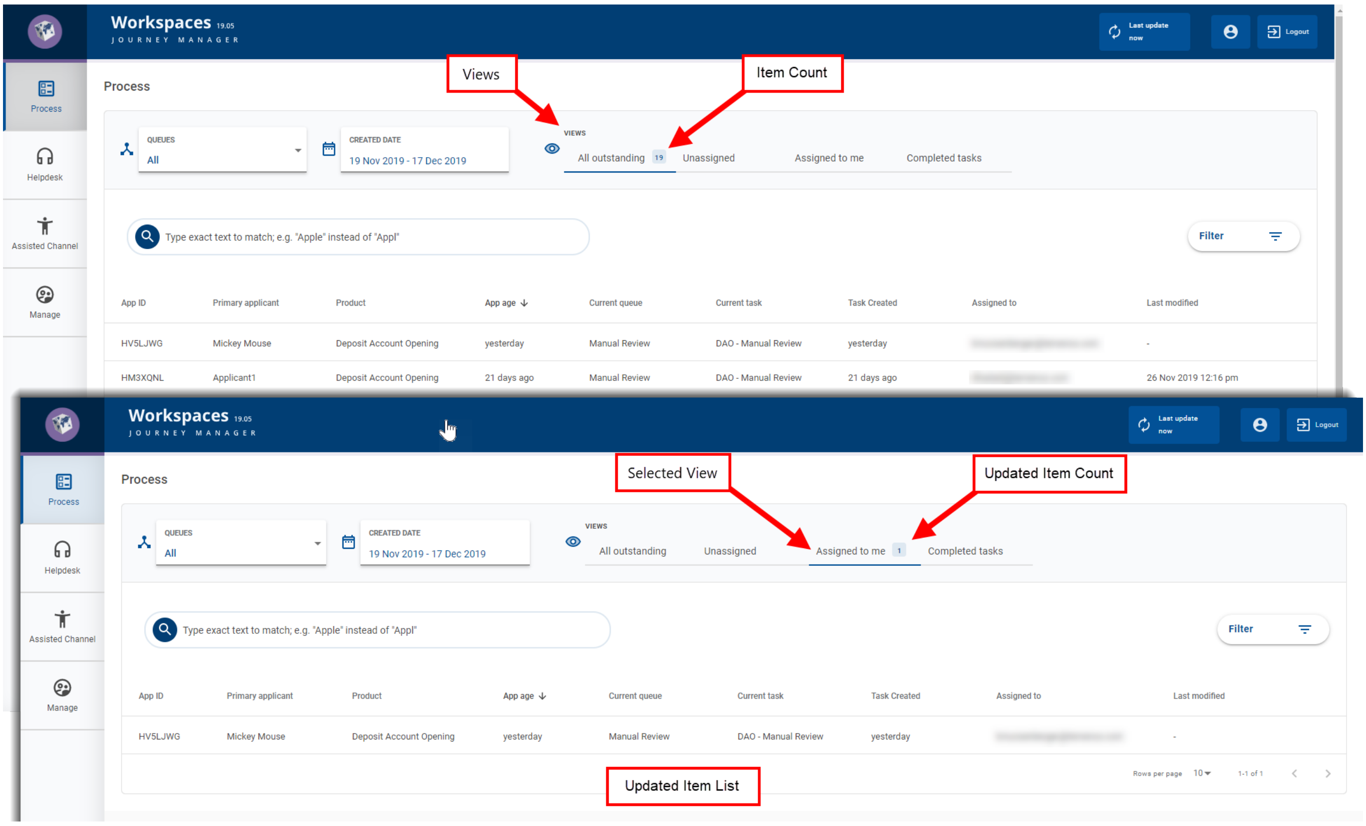
Views

The default configuration of each Journey Workspaces space includes a default view selection. A **view** is a predefined configuration of item list fields, view filters and sort options. These default settings are selected automatically when a List screen 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 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.

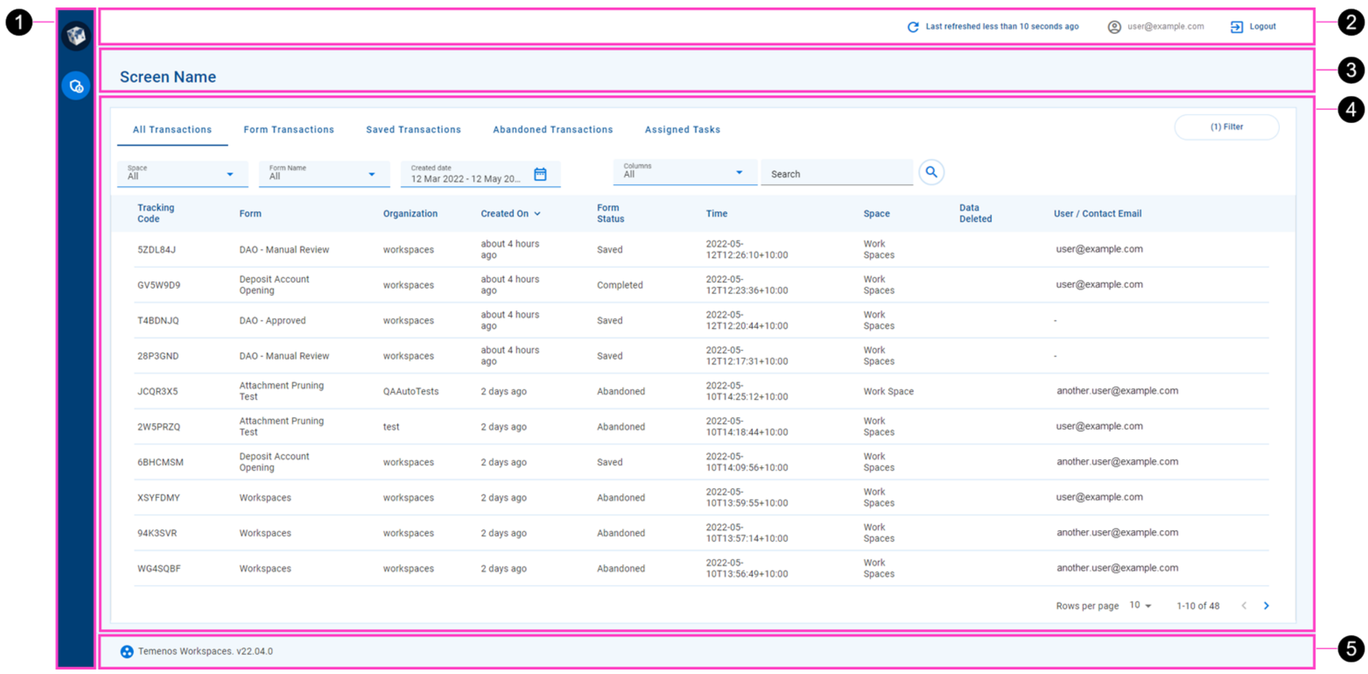
The spaces you can access also control which features are available to you. For example, if you have access to the Task Review space or Manage spaces, you can select a queue which gives you access to the specific tasks on that queue. Then, the tasks or applications you can access and their current state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

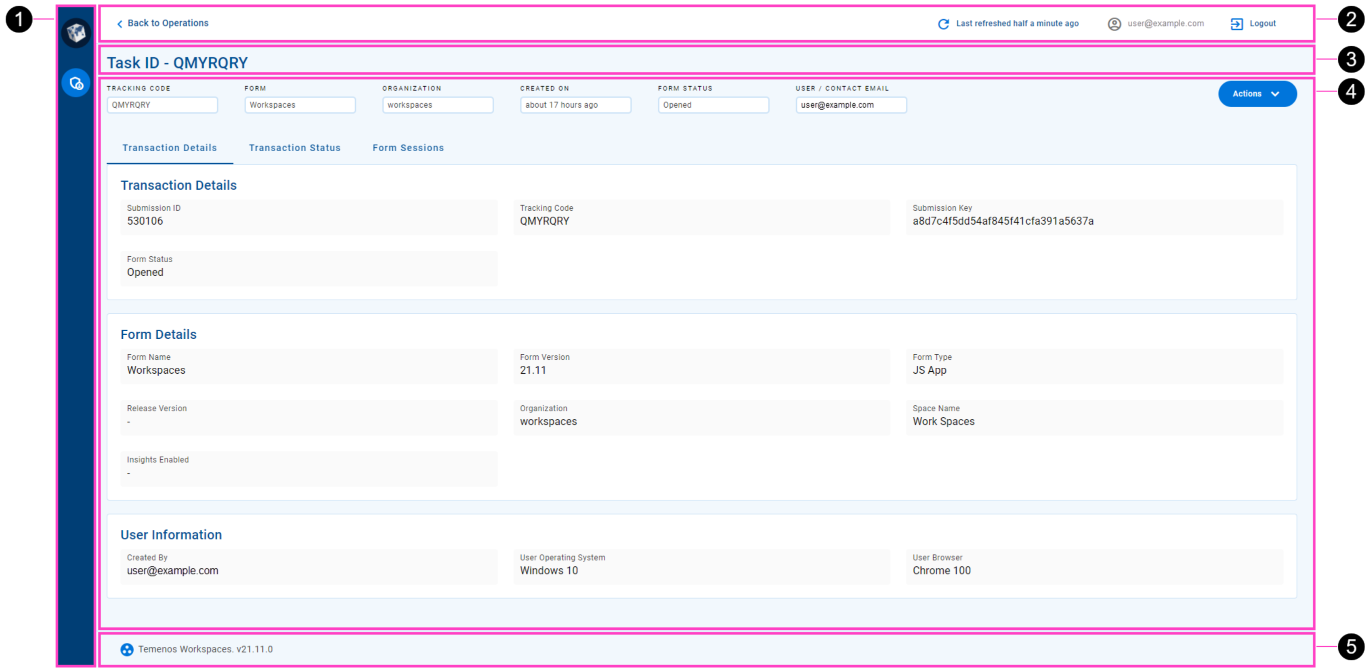
Workspaces UI Tour

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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

- List Screen
- Detail Screen





1. **Spaces navigation bar (navbar)**: The **Spaces** navbar lets you select a space to work in. For example, select the **Helpdesk** navbar item to switch to the Helpdesk space.
2. **Screen header**: The screen header displays when the content pane was last refreshed and includes an option to refresh it. The name of the logged in user is also displayed, and there's an option to logout.
3. **Screen name**: The screen name changes depending upon the screen currently displayed. For a List screen, the screen name is the same as the name of the selected space. For a Detail screen, the screen name corresponds to an item selected on a List screen.
4. **Content pane**: The majority of each screen displays content specific to the screen type (List or Detail).
5. **Screen footer**: At the bottom of the screen is the screen footer which displays the application name and version.

The **Spaces** navbar, screen header, screen name, and screen footer provide common functionality applicable to all Workspaces portal pages, while the content pane presents content and features that are specific to the selected space and the screen type (List or Detail).

Spaces Navigation Bar

The Spaces navigation bar shows all the spaces you can access, and provides a way for you to move between them. Several related spaces may be grouped together under a space group. Select a space item in the Spaces navbar to switch to that 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.

Space	Used by (Role)	Description
Task Review†	Processing staff	Offers review capabilities for pending applications that need manual action.
Document Requests†	Processing staff	Offers review capabilities for tasks assigned to customers and which require their action.
Helpdesk	Helpdesk staff	Find applications quickly and easily to provide prompt and accurate customer assistance.
Assisted Channel	Relationship managers	Kick start the application process on behalf of customers, and monitor application progress.
Manage	Managers and supervisors	Provides task management capabilities.
Applicants	Applicants	Allows applicants and their representatives to interact with applications through to completion.

† By default, the Task Review and Document Requests spaces are group together under a **Process** space group.

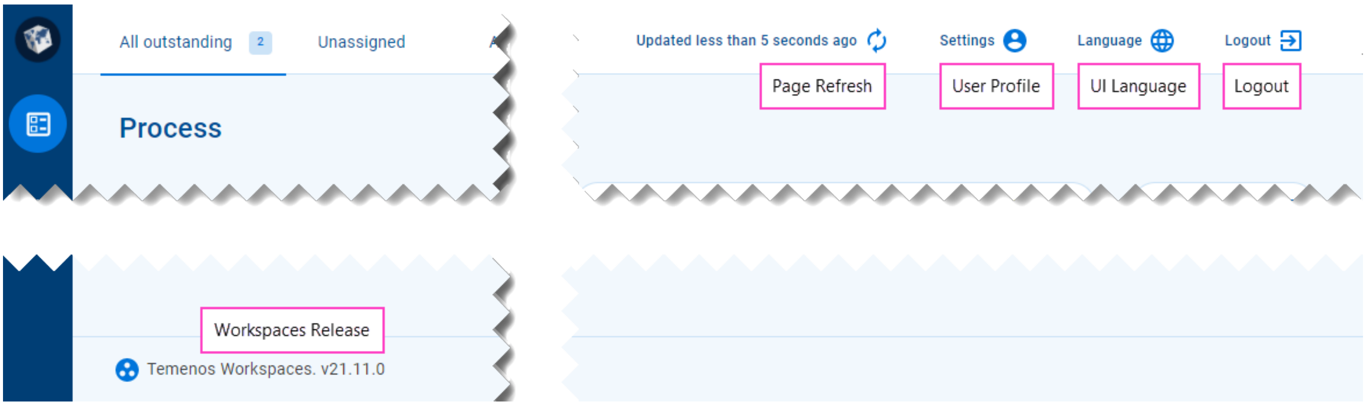
For more information about spaces, see Roles and Spaces.

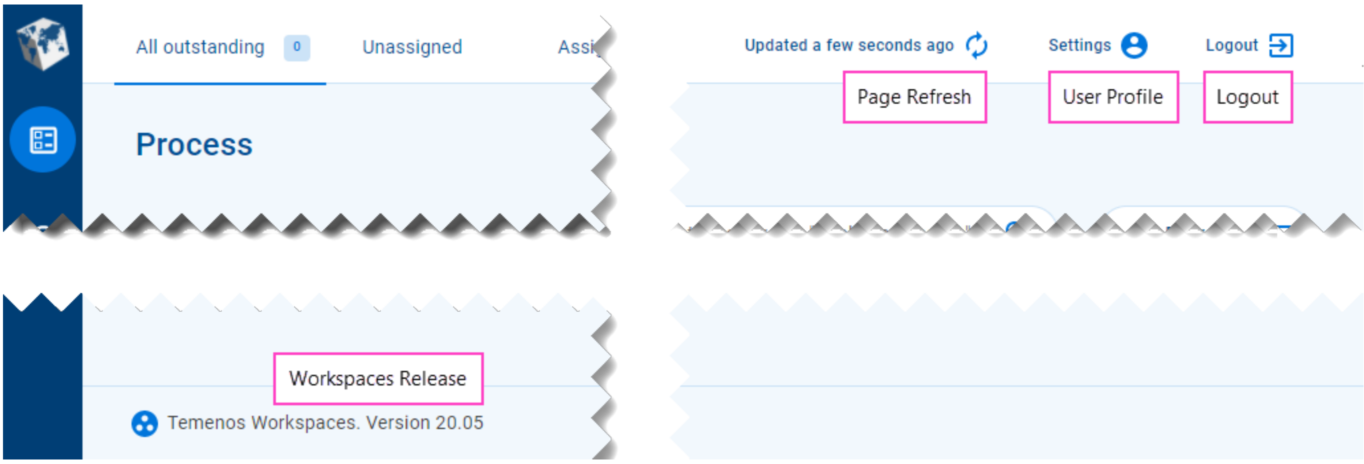
Screen Header

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

- 21.11
- 20.05

- [Prior to 20.05]





On the screen 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 This feature was introduced in 21.11.
- An option to log out of your current Workspaces session.

NOTE

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 screen 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.

Content Pane

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

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

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.

Examples of how Workspaces uses modal windows include the following.

- View any receipt for any task associated with a selected application.
- Manage the documents attached to an application.
- Start, fill in, and save or submit a new form in the Assisted Channel space.

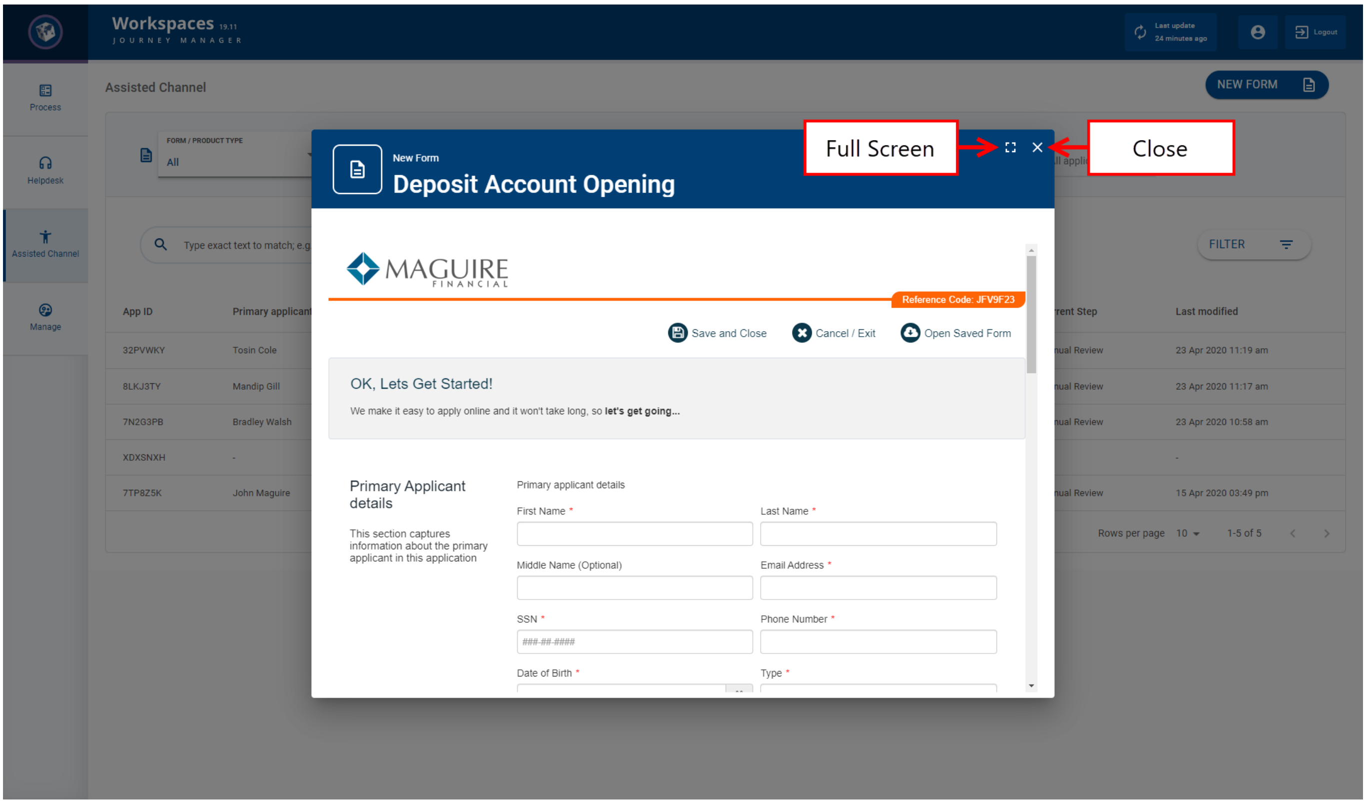
By default, a modal window opens in the same browser tab where you are using Workspaces, and in a way that prevents you from interacting with the main Workspaces screen behind it.

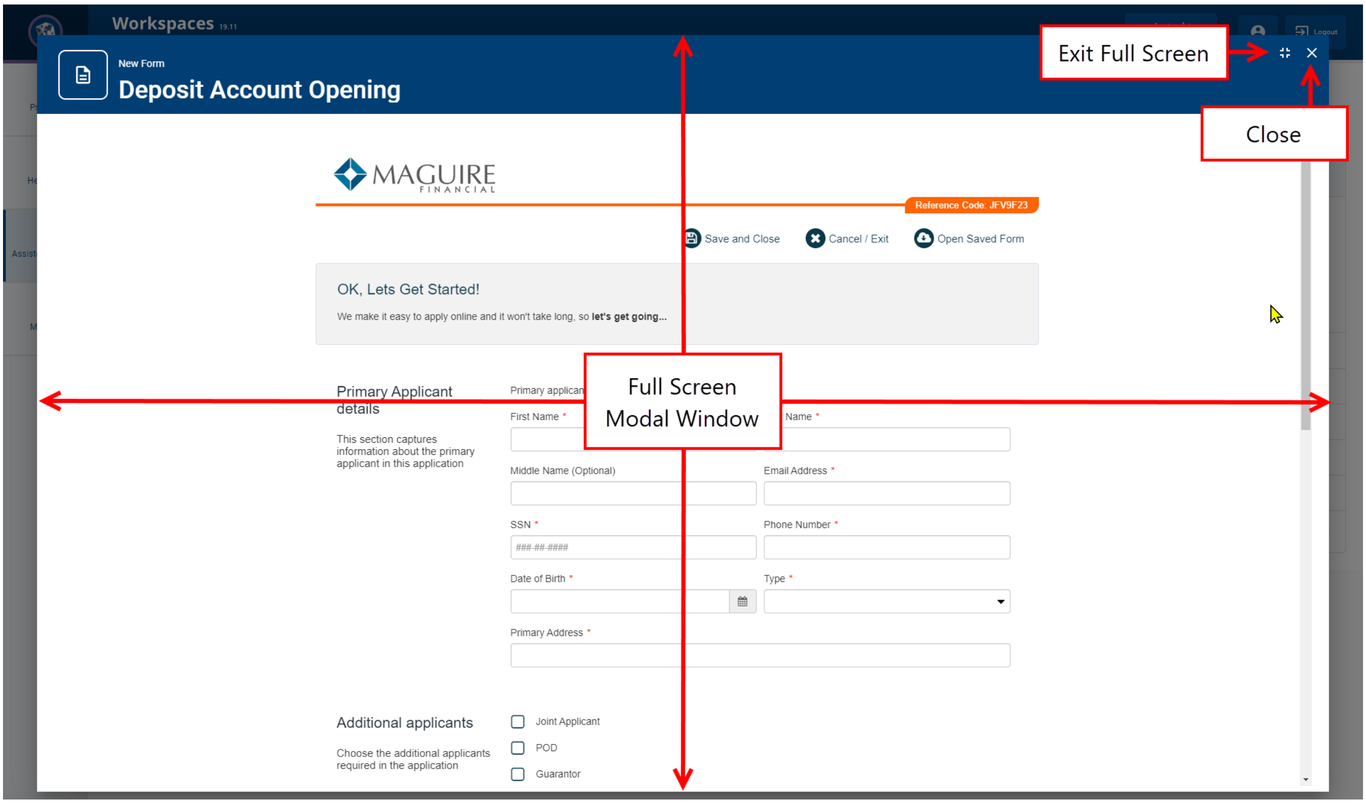
However, a modal window can be popped out into a separate browser tab, allowing you to close the modal and interact with Workspaces while still being able to view the receipt. | 22.10 This feature was introduced in 22.10.

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.

Use the fullscreen (Full Screen) and fullscreen_exit (Exit Full Screen) icons to control the size of a modal window, or the open_in_new (Pop Out) icon to pop out the modal content into a separate browser tab. When you're finished with a modal, click the close (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
- Modal Window - Pop Out





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 Screen

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Workspaces portal.

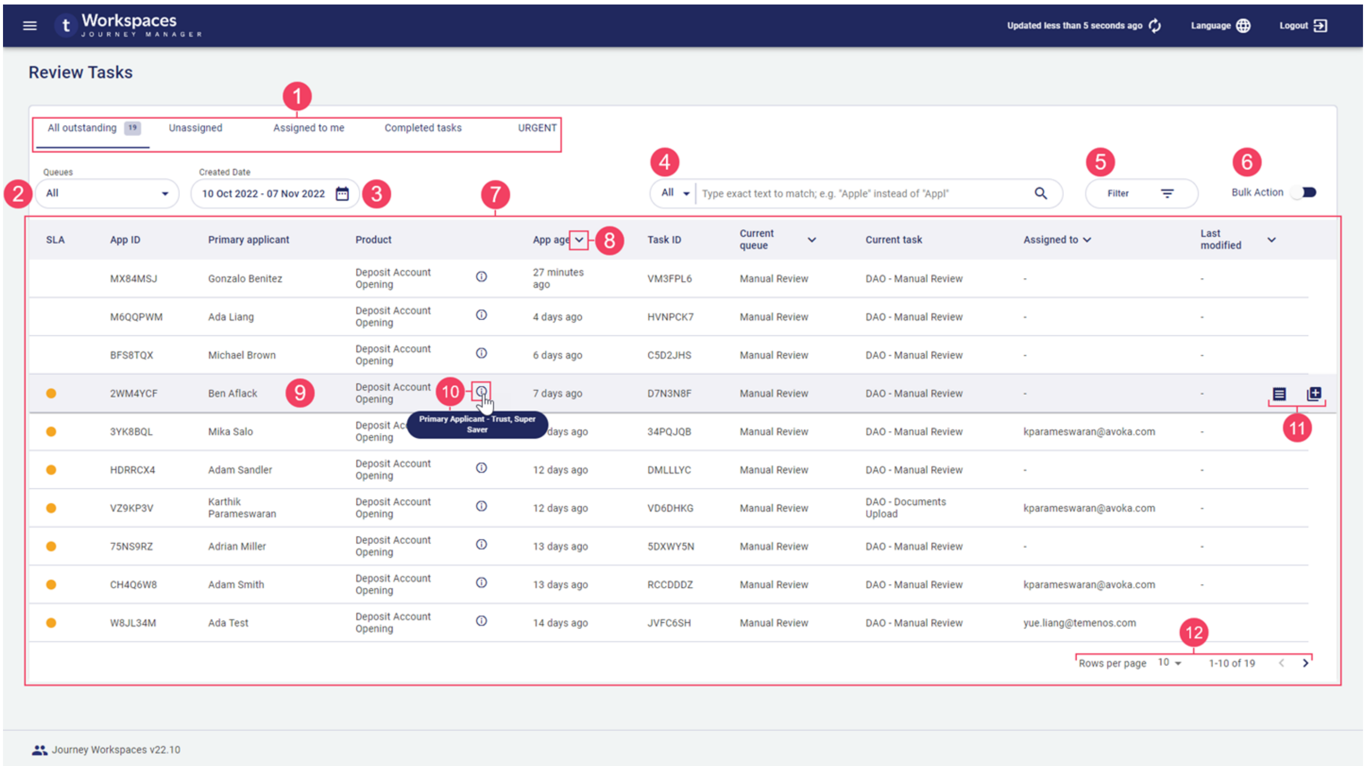
Overview

Each space in a Workspaces portal is configured with a List screen 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 screen is configured with a set of common features that allow you to control which items are displayed in the list, including the following.

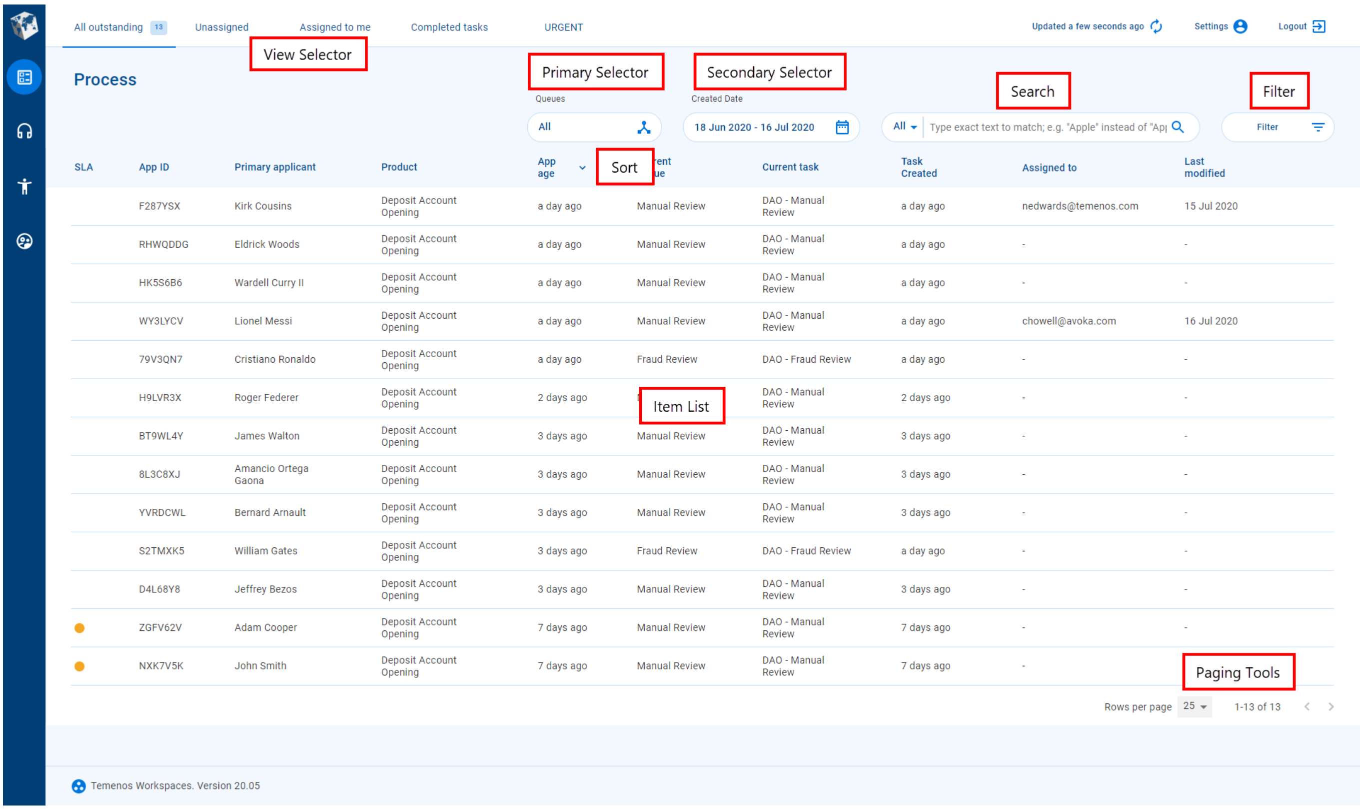
- An item list containing a list of tasks or applications.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11 This feature was introduced in 19.11.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- A global filter for the selection of a queue (Task Review and Manage spaces) or a form / product type (Document Requests, Helpdesk and Assisted Channel spaces).
- A second global filter, Created Date, that restricts the items in the item list based on the date they were created.
- Flexible search, filter and sort options that you can use to refine the set of tasks or applications in the item list.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

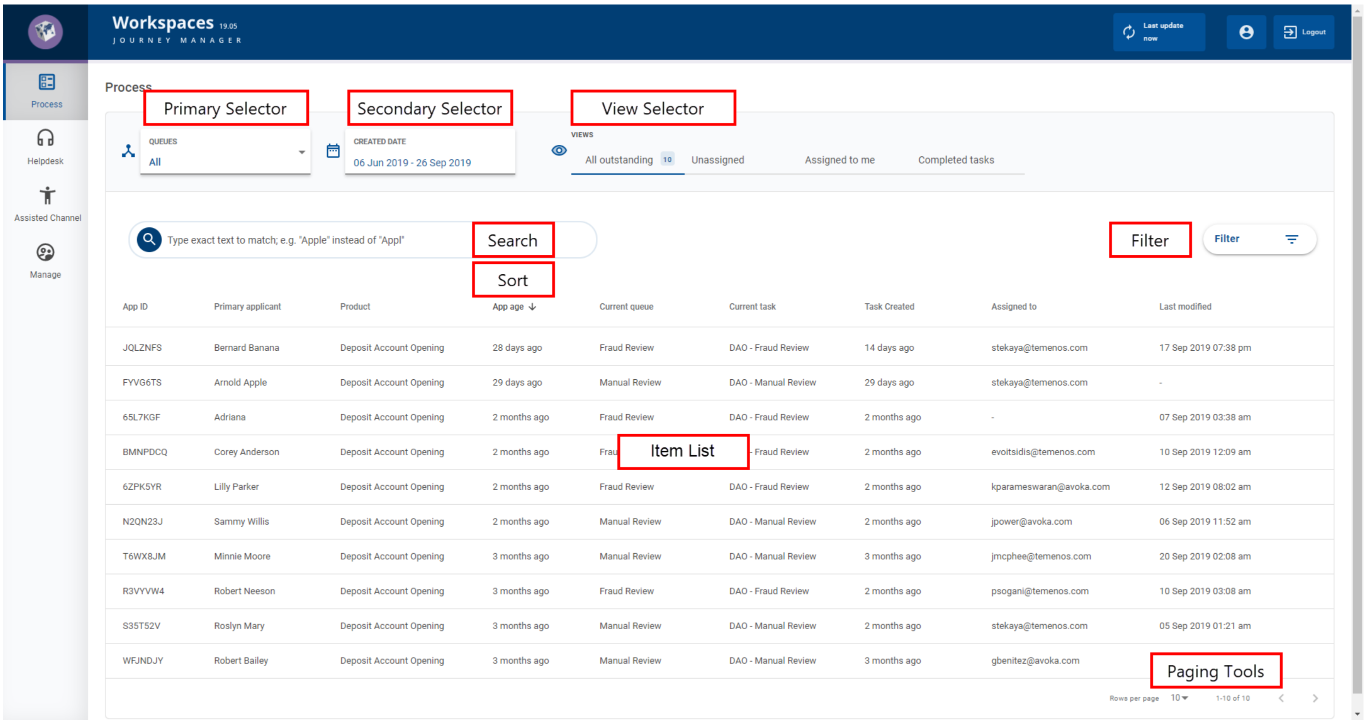
The following image illustrates where you can find the common features on the List screen using the Task Review space as an example.

- [22.10]
- [20.05 - 22.04]
- [Prior to 20.05]



1. View Selector
2. Primary Selector
3. Secondary Selector
4. Search
5. View Filter
6. Bulk Action
7. Item List
8. Sort
9. Task/Application Item
10. Tooltip
11. Action Buttons
12. Paging Tools





The List screens for the Task Review 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 Task Review and Manage spaces.

The main element on the List screen is the item list which displays summary information for a list of tasks or applications. The selectors at the top of the screen, 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.

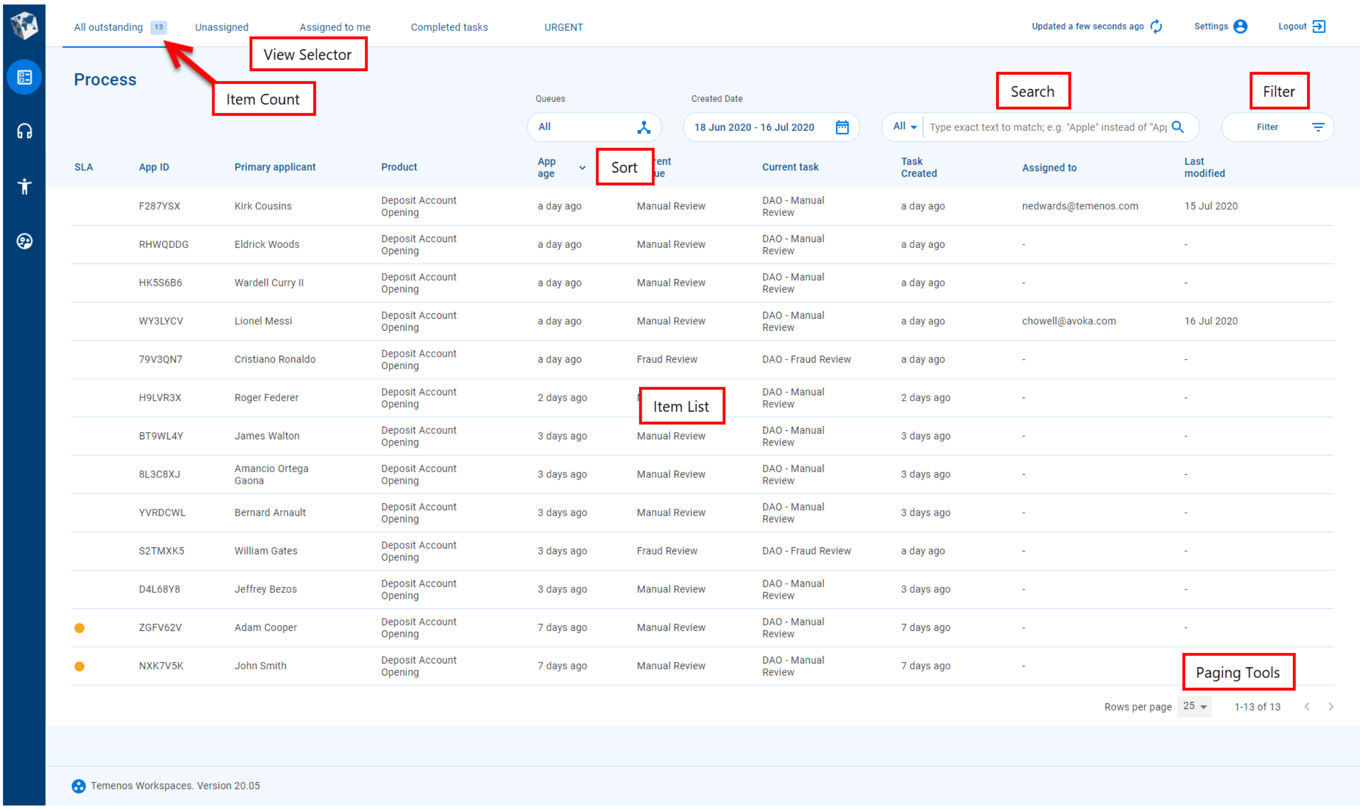
- The first global filter shows the name of the active queue (Task Review and Manage spaces) or form / product type (Helpdesk and Assisted Channel spaces), and lets you select another queue or form / product type so that you can work with other tasks or applications.
- The Created Date global filter 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.

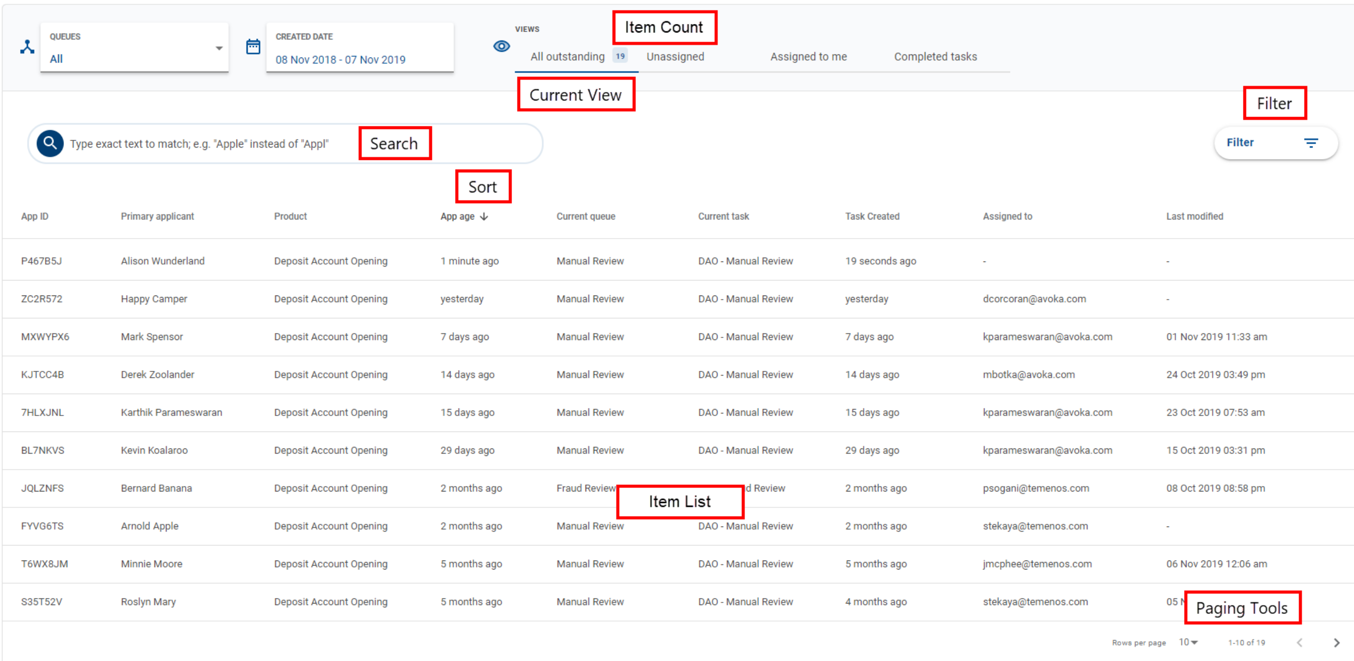
If you've selected global filters and a view, and you can't see the item you're looking for, you can further refine the list of items using the filter and sort options. Filtering restricts which items are displayed in the item list, and sorting determines the order items appear in the list. To learn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

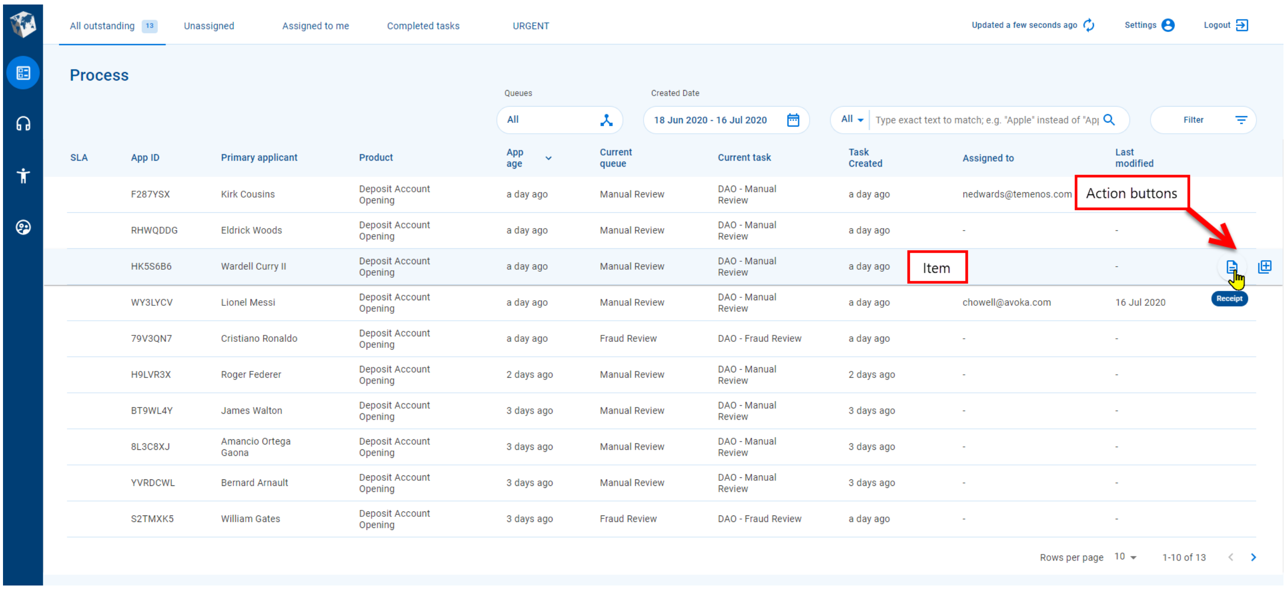




The number of items that satisfy all criteria for selection is shown as the Item Count next to the view name. The global filters, current view, search and filters all contribute to the calculation of the Item Count.

Once you’ve found the task or application that you’re looking for, there are three ways you can interact with it on the List screen.

- 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 Details screen 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 screen, see [The Application Details Screen].
- Switch to the Bulk Action mode to perform an action on multiple tasks at once. To learn about bulk actions, see [Bulk Actions in Workspaces].

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 screen. 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 screen.

Item List

The main element on the List screen is the item list which displays application and task related information in rows and columns. Each row of the item list corresponds to a single task or application item, with different item details shown in each column to help you 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.

Each item list column can only show a single value. However, additional values can be displayed using a tooltip, indicated by the info (Tooltip) icon. For example, say you have an application covering multiple products. While an item list row representing this application displays only the first product in the Product column, a tooltip can be configured to show all of the products covered by the application. To view the tooltip, point your mouse at the info (Tooltip) icon. | 22.10 This feature was introduced in 22.10.

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:

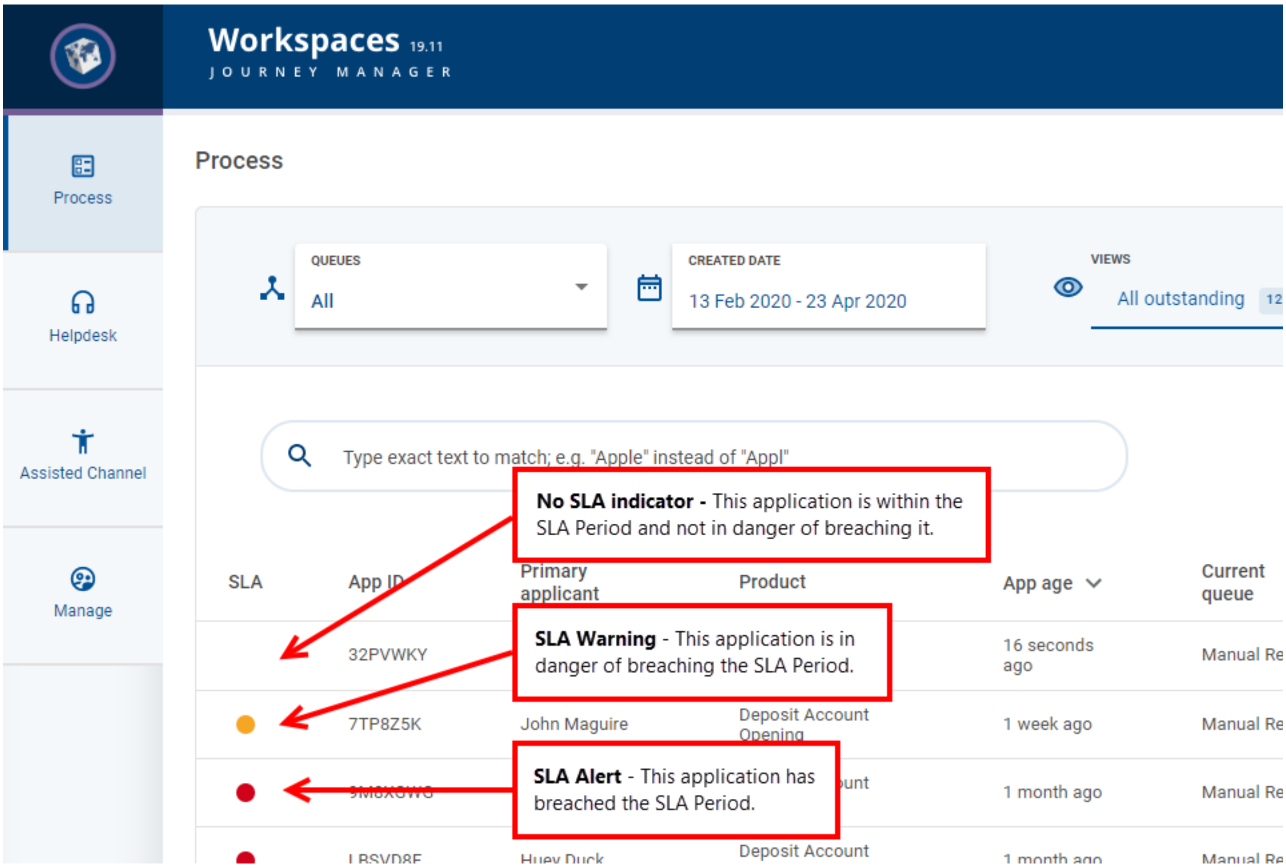
- In the Task Review and Managespaces, the item list is populated with tasks for submitted applications sourced from the active queue, and that satisfy the common criteria.
- In the Helpdesk space, the item list is empty initially; search for an application ID to populate the item list with saved or 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

NOTE

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 Task Review 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 screen, showing how processing of the application is progressing relative to the SLA.

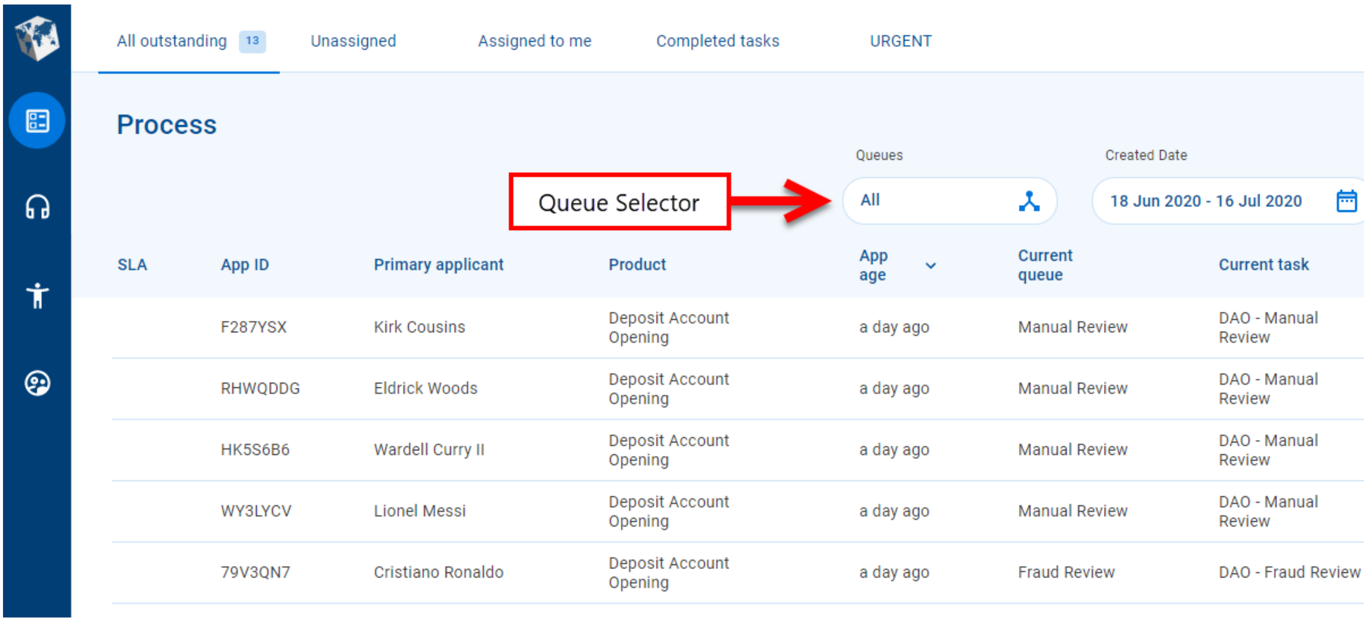
Queue Selector

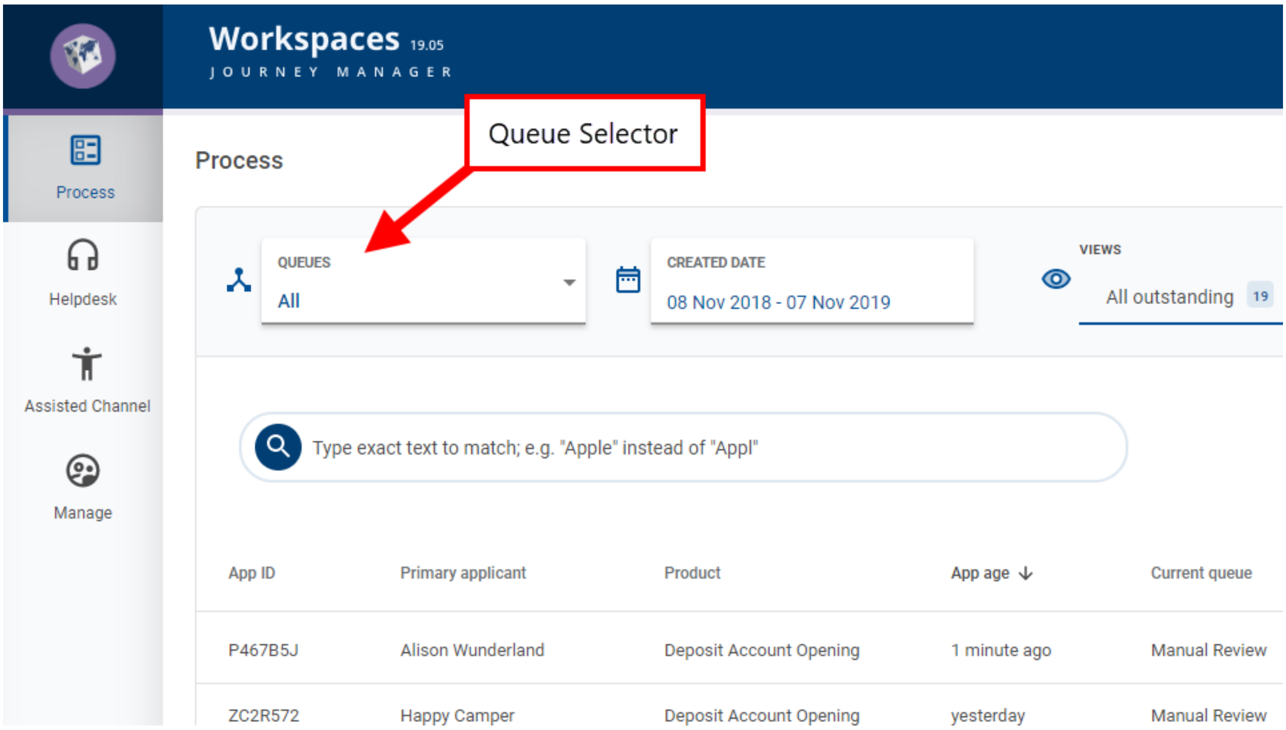
In the Task Review and Manage spaces, the List screen allows you to interact with tasks from any queue that you can access. The Queues selector identifies which queue is currently used as the source for populating the item list. You can select another queue from the Queues selector if more than one queue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

NOTE

The default Workspaces configuration makes the Queues selector available in the Task Review and Manage spaces only.

- 20.05 and later
- Prior to 20.05





In the Task Review and Manage spaces, when the List screen 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 screen.

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.

NOTE

Selecting the Allqueues 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 Allqueues item is selected.

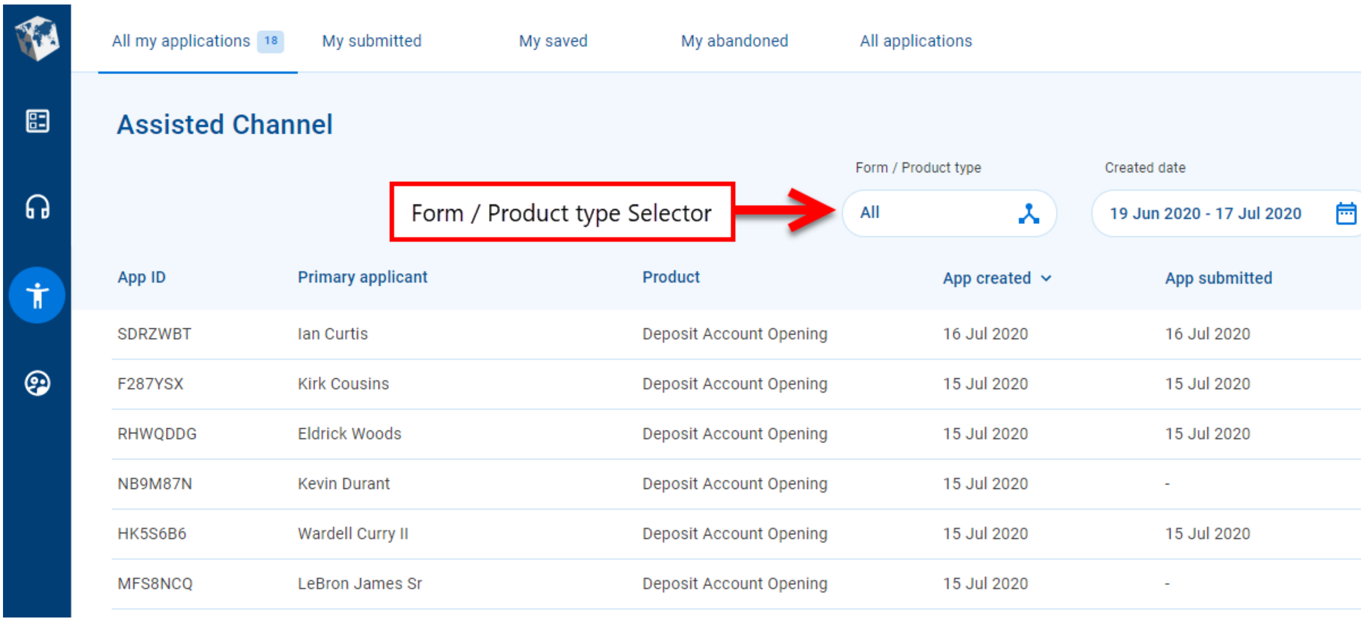
Form / Product Type Selector

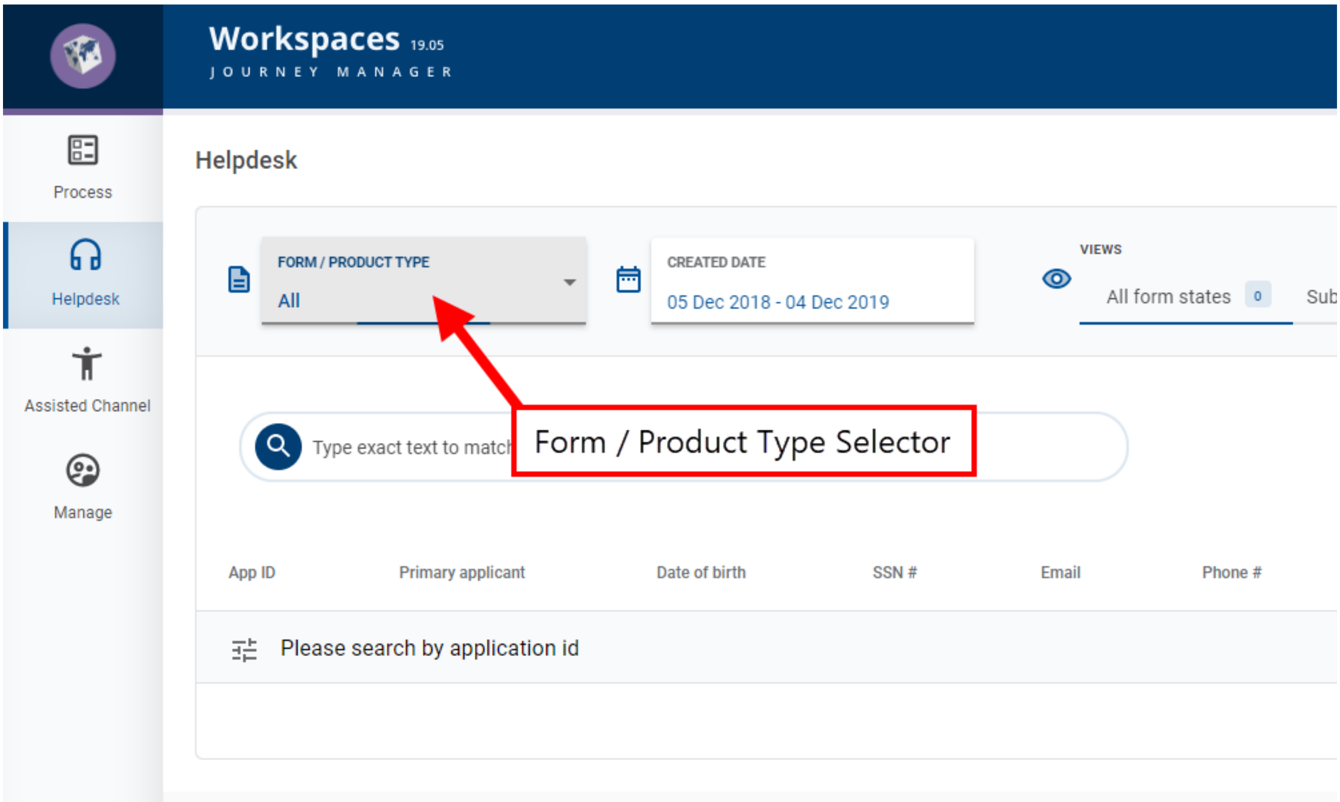
As mentioned above, the first global filter applied to the List screen in the Helpdesk and Assisted Channel spaces is for a form / product type. The Form / Product Type selector identifies the currently selected form / product type, and allows you to select another form / product type to apply as a global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

NOTE

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 screen 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 screen again.

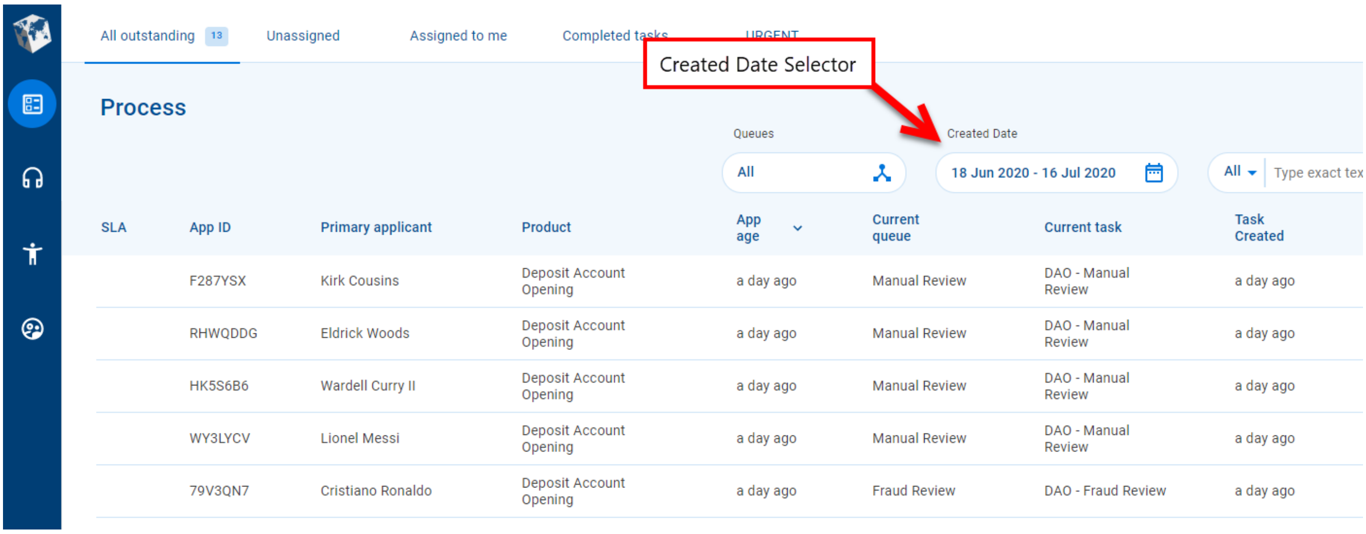
The available form / product type values are listed in the Form / Product Type selector's dropdown list as well as an All item. You can choose any form / product type from the dropdown list to be applied to the item list. If you choose All, the item list is populated with applications for all form /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

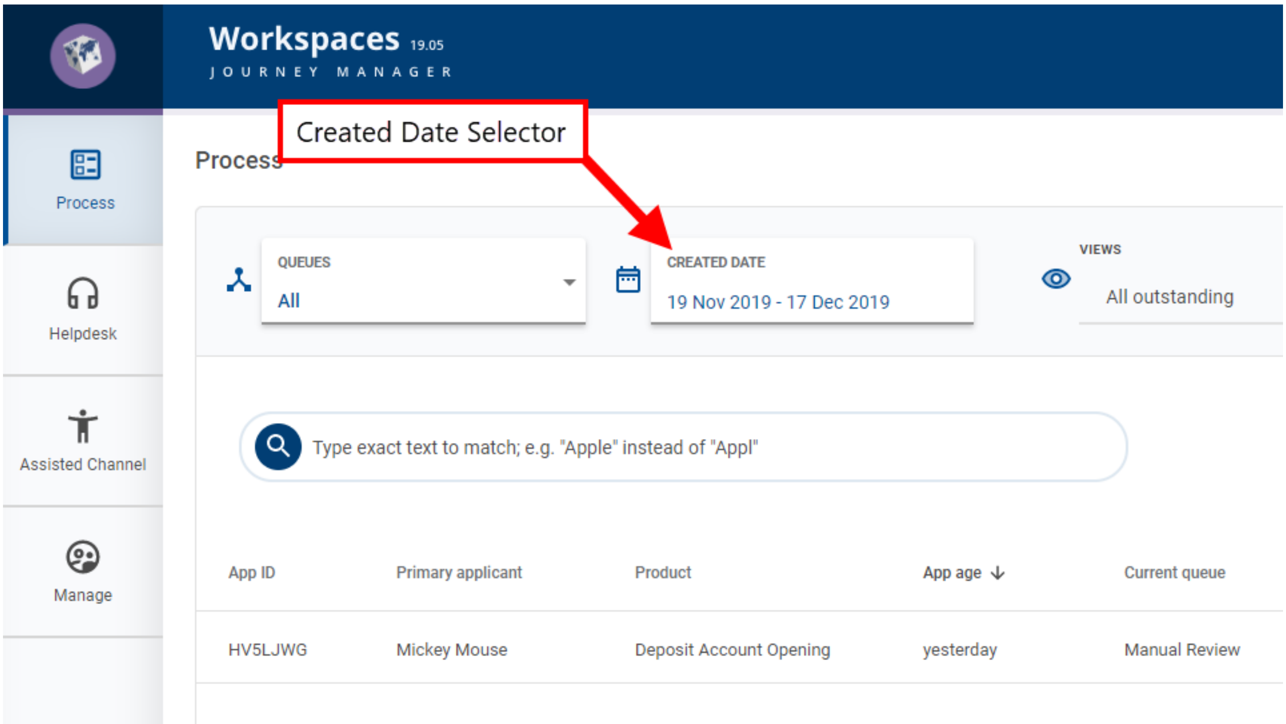
A form / product type item may represent a form group. When a form group is selected, the specific form associated with each task is displayed in the item list's Product column. | 22.10 This feature was introduced in 22.10.

Created Date Selector

Another feature on the List screen 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]



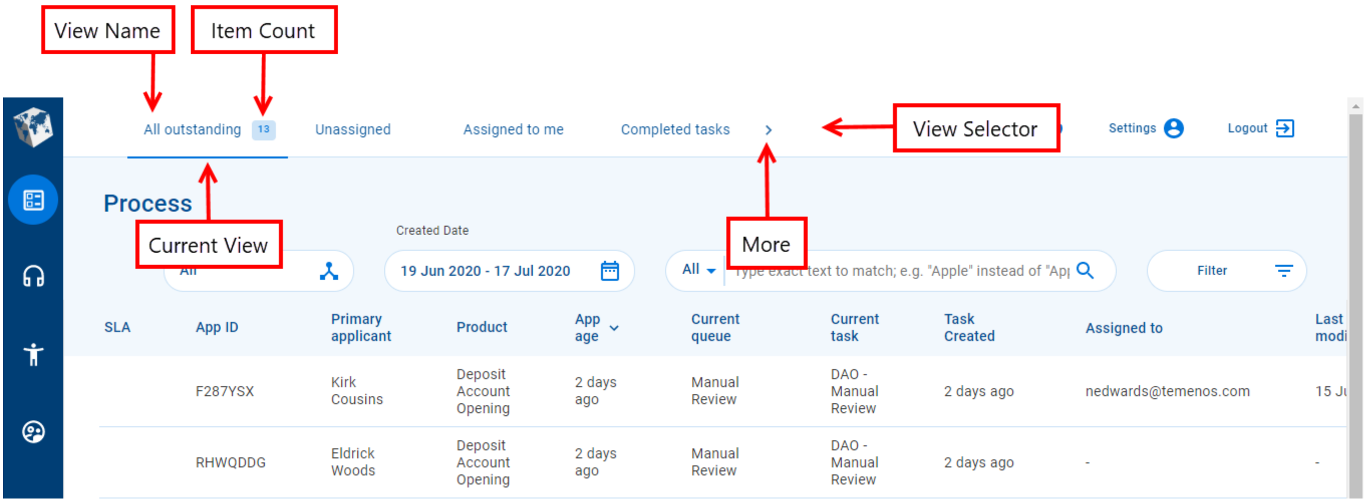


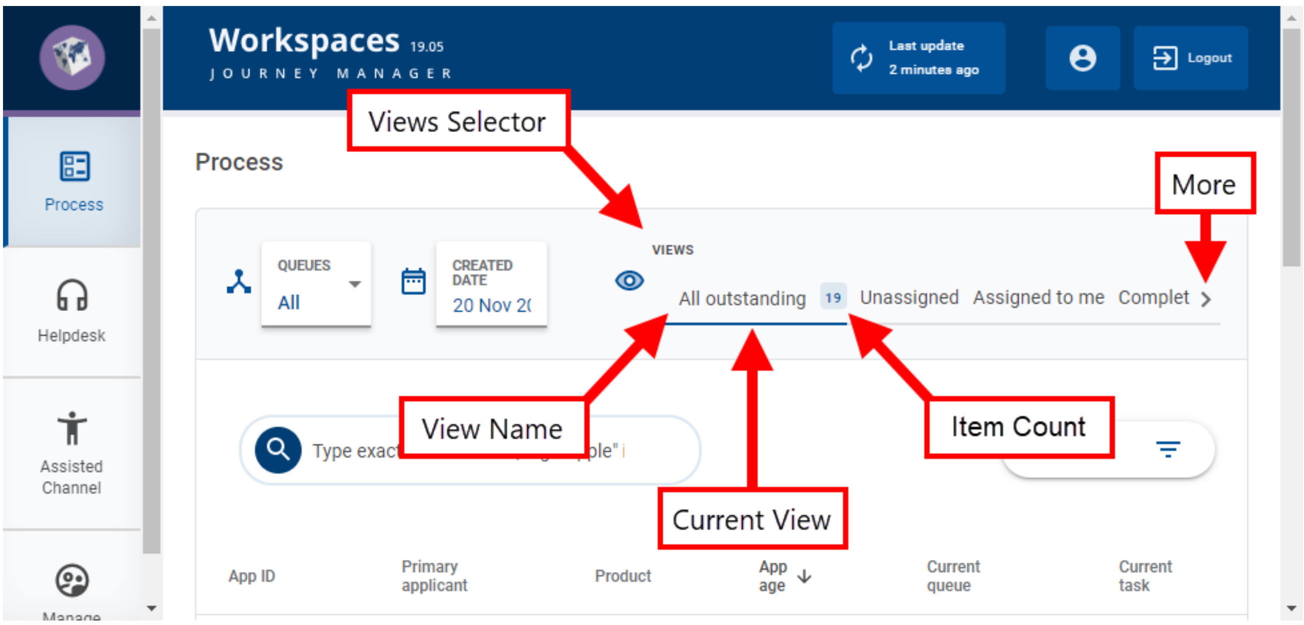
The default creation date filter restricts the tasks or applications displayed in the item list to just those that were created in the last 30 days, including the current date, and this filter is applied the first time you access the List screen. You can select a different creation date filter using 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" on page 61.

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.

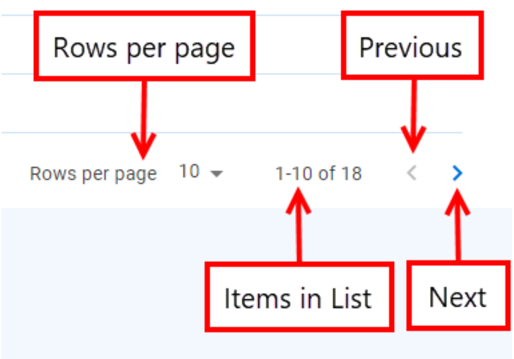
Search and filter are similar in that both reduce the number of items by matching values and fields. However, there are some key differences between these two features:

- 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" on page 61.

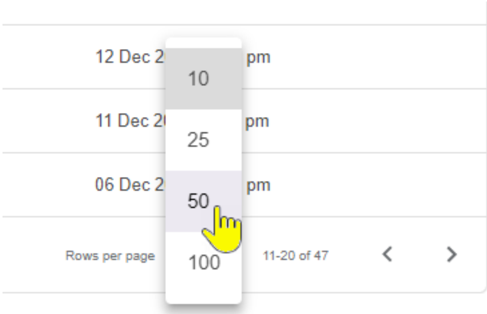
Paging Tools

Sometimes, there are too many items to display all at once on the screen. Paging allows you to see some of the items now then browse the item list one page at a time to see more. Paging tools let you choose the number of items to display on an item list page, and navigate (forward or backward) through the available pages of items.



The navigate_before (Previous Page) and navigate_next (Next Page) paging tools let you browse through item list pages to find the items you need. Click these tools to display the previous or next page of items in the item list. The navigate_before (Previous Page) tool is disabled when the first item list page is displayed; similarly, the navigate_next (Next Page) tool is disabled when the last item list page is displayed.

Rows per page shows the maximum number of items displayed on an item list page. You can select a different page size from the Rows per page dropdown. Selecting a different page size, resets the item list to show the first page again.



Finding Tasks and Applications

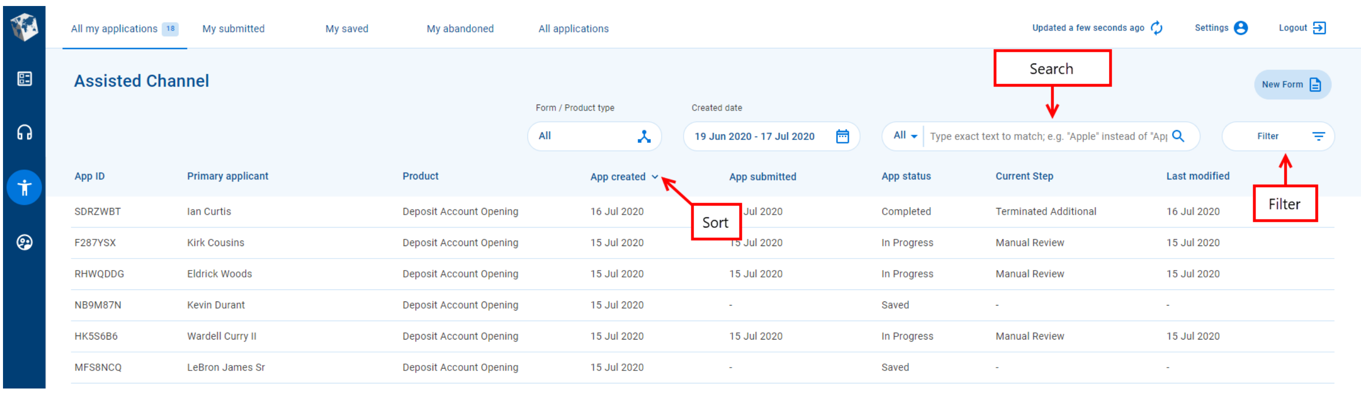
WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 21.11This topic was updated for the 21.11 release

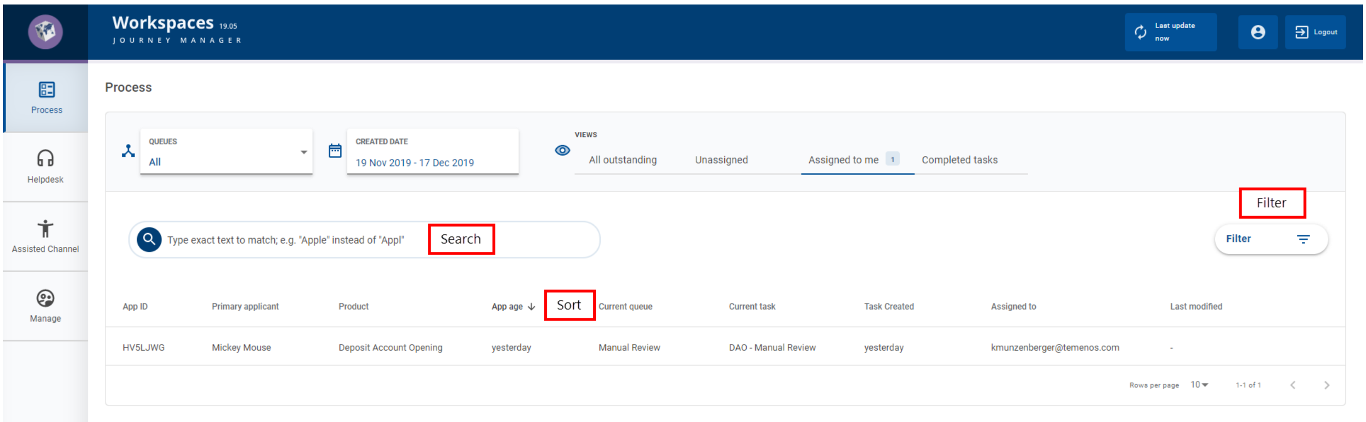
NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Workspaces portal.

The Workspaces item list shows tasks from the active task queue (Task Review 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





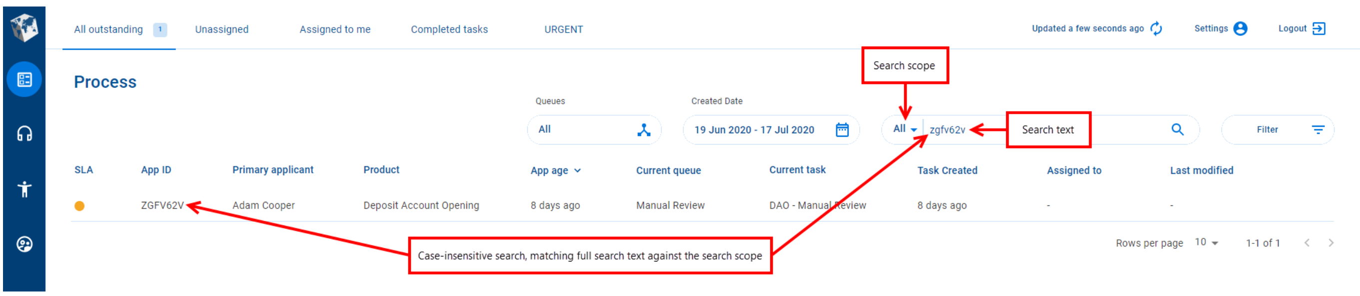
Searching and filtering are similar in that both reduce the number of items in the item list by matching desired field (column) values. However, searching differs from filtering in a number of ways:

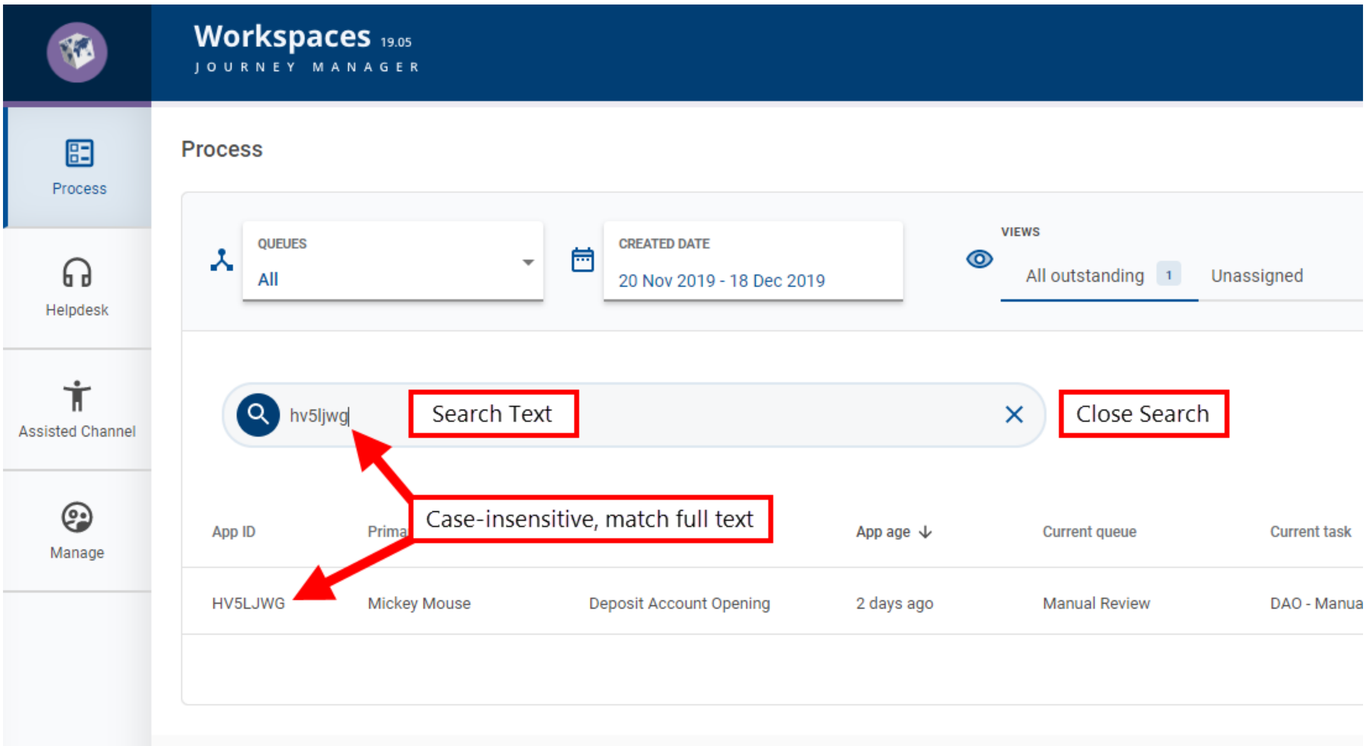
- Searching can target one field or all fields, whereas each filter is targeted at a single specific field.
- When searching on one field, the user can choose which field to target, whereas each filter is targeted at a fixed predetermined field.
- When searching on all fields, the same search text is compared against all searchable fields. In contrast, filtering allows you to match a different value against each filter field.
- Searching is supported for text fields only, whereas filtering is supported for different data types 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 reloads the List screen.

> NOTE
>
> 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 screen to the List screen, the search will still be active. This is indicated by the text and ✕ in the **Search** field.

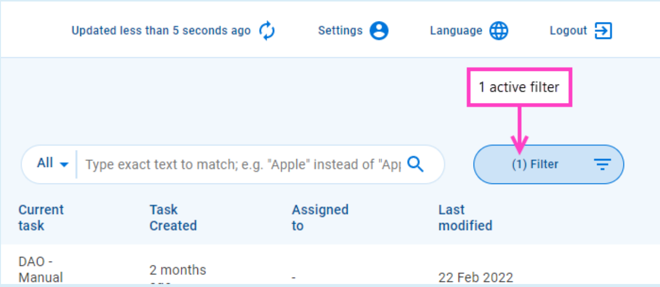
Filter the Item List

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.

INFO | 21.11 THIS FEATURE WAS INTRODUCED IN 21.11.

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



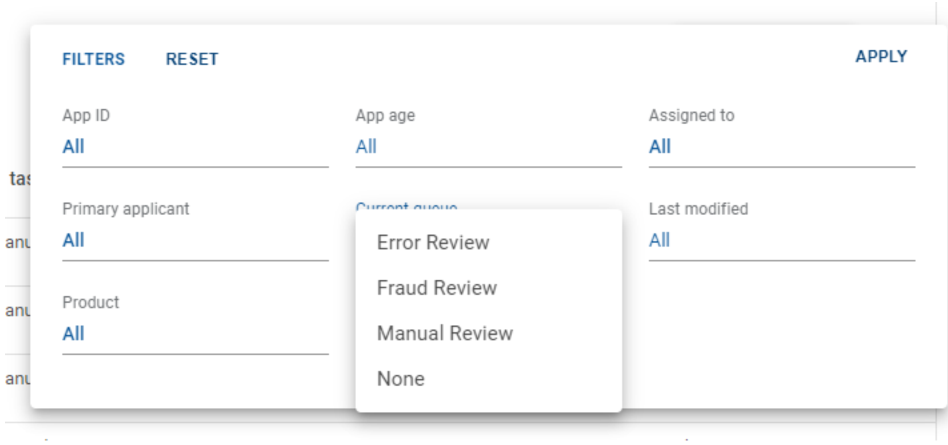
To view the current filters, click the (Filter) button. The Filters selector is displayed showing all the filters that are currently applied to the item list. Each filter allows you to select a value or set of values to compare against the column.

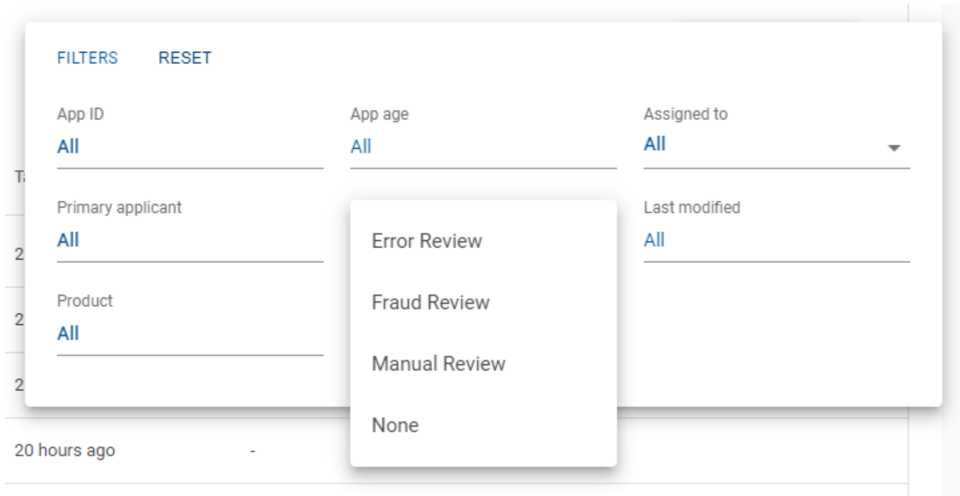
Workspaces supports several types of filter.

- **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



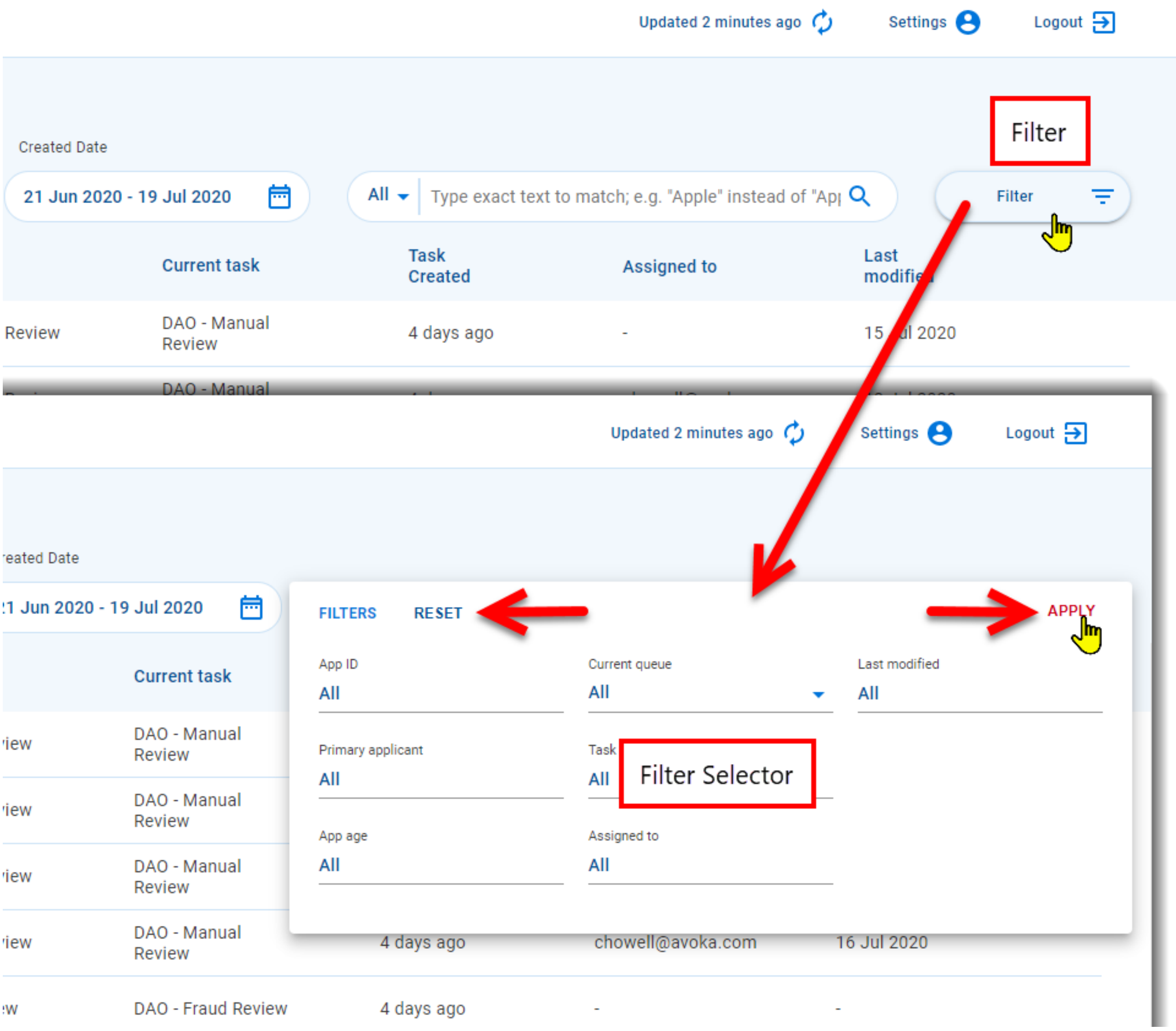


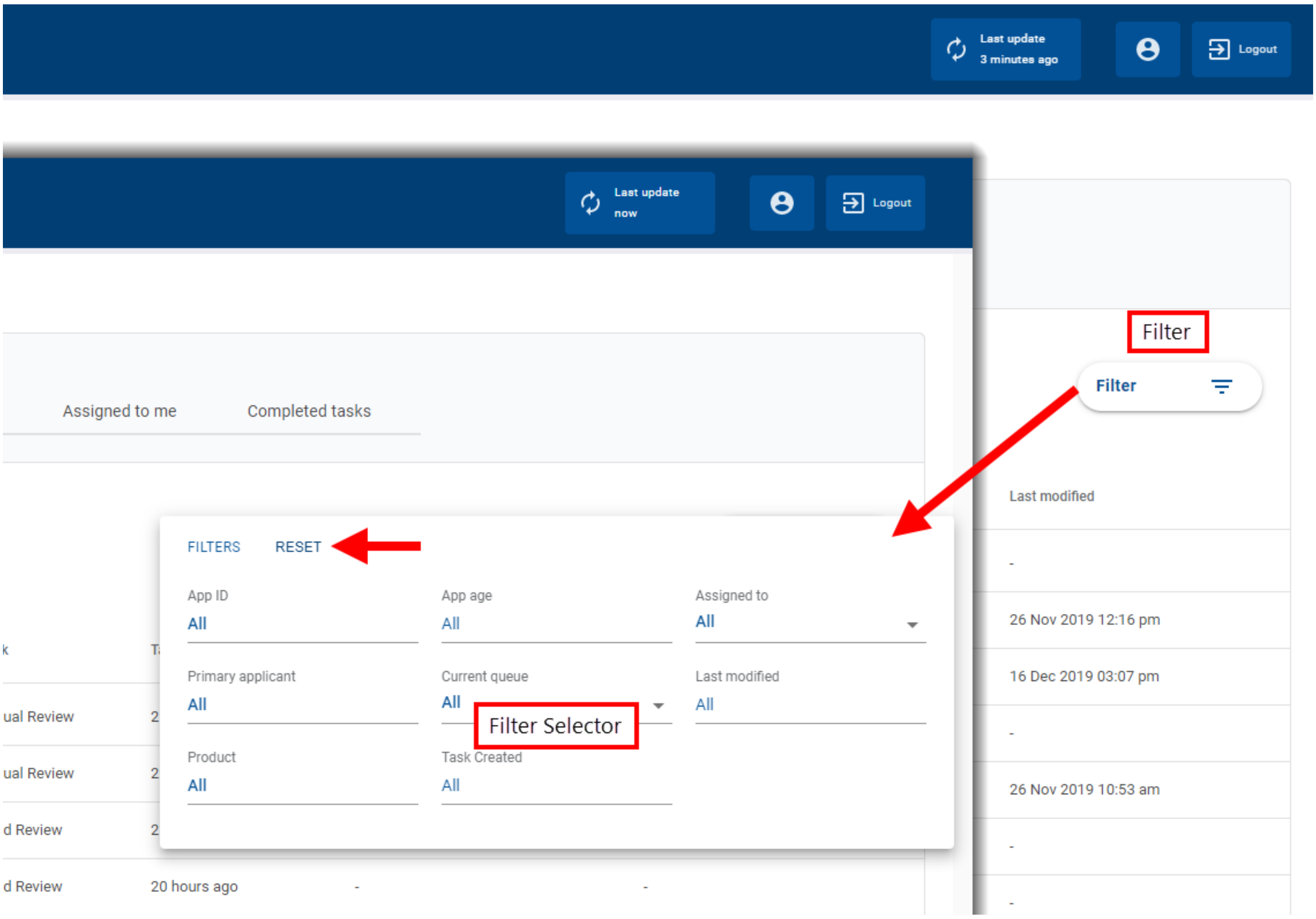
To apply a filter to the item list, click (Filter) (1) to display the Filters selector then select the filter values you want to apply from the various filter items (2,3) and click Apply (4). Click outside the Filters selector to close it. The number of active filter items is displayed on the Filter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

INFO

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
4 days ago



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.

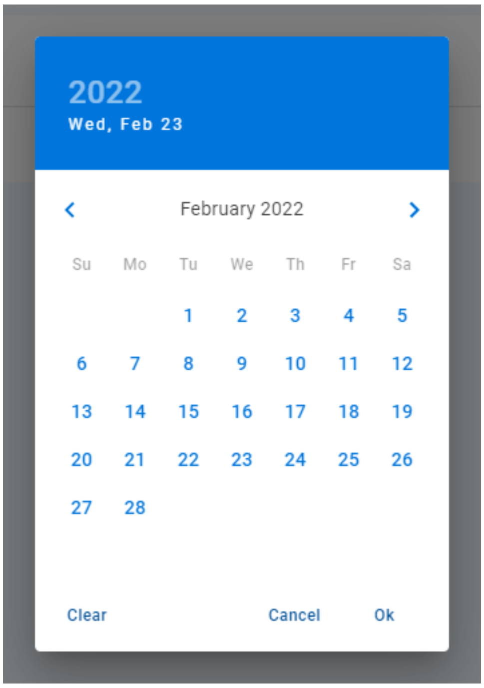
You can filter on a single date regardless of configuration. To filter on a single date:

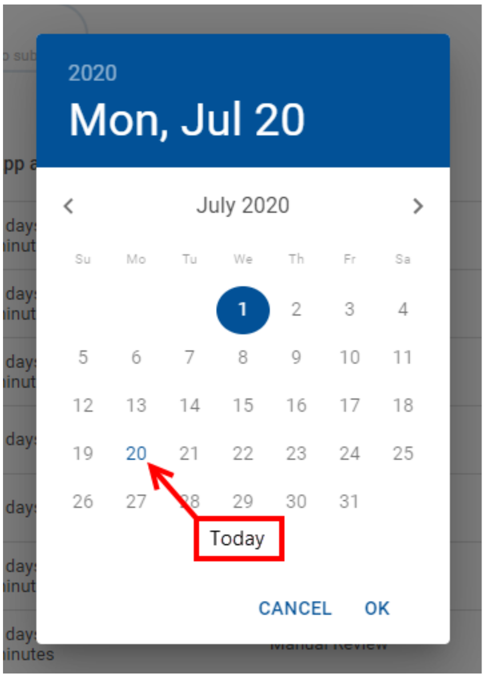
- **Date picker:** Simply click the date you want to filter on.
- **Date range picker:** Click the same date twice to select a one-day date range.

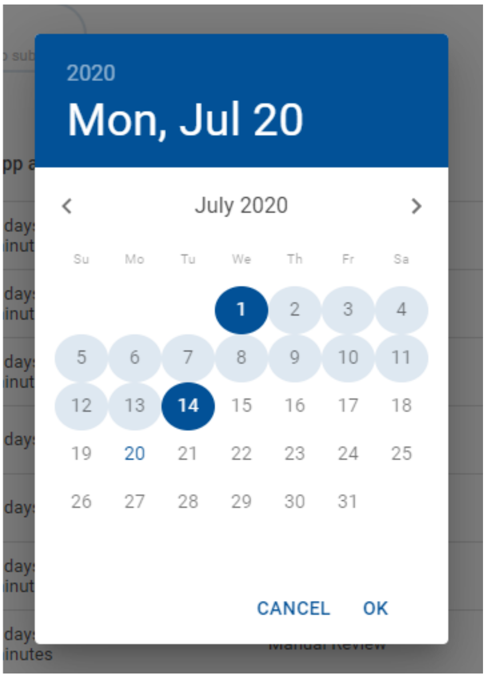
To filter on a date range, click the first date (4) then click a second date (5) to define the desired date range. You can click the dates in any order; you don't have to click the earlier date first.

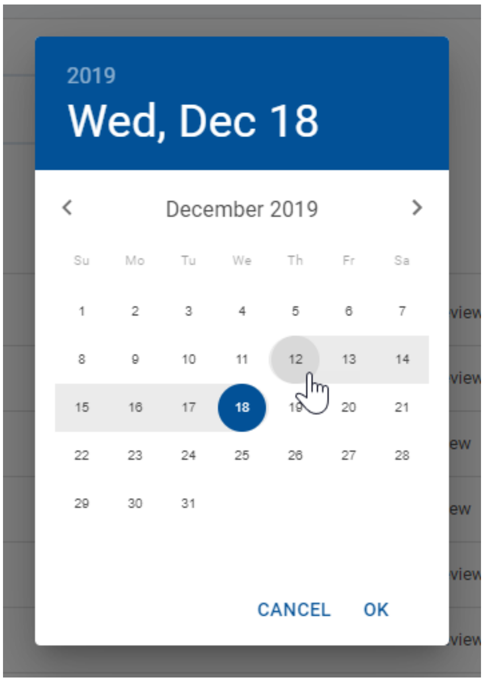
When selecting a date, use (Previous Month) or (Next Month) to browse to and select dates in other months. Once you've selected the date or dates for the filter, click OK (6) to apply the date filter.

- [21.11]
- [20.05]
- [Prior to 20.05]









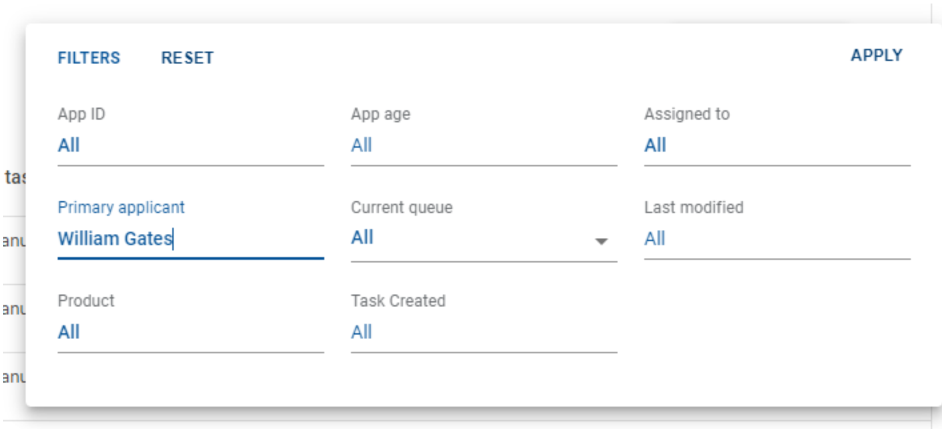
Text Filters

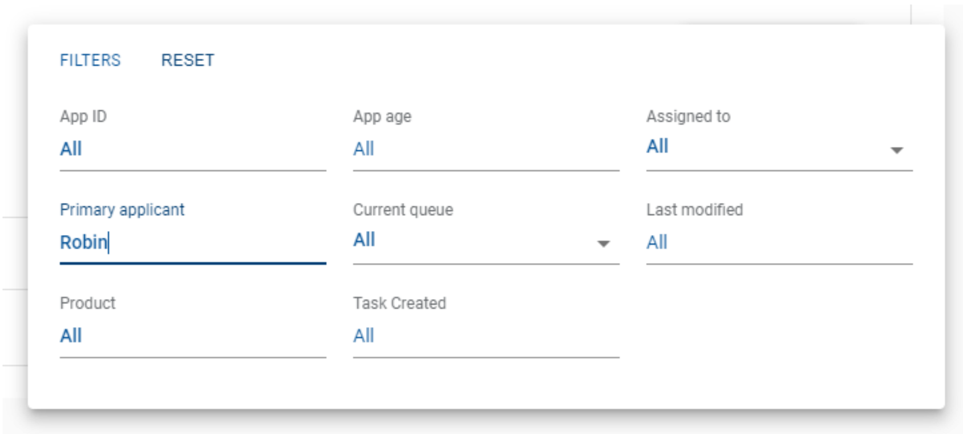
To filter on a text field, click the field in the Filters selector and enter the filter value. In Workspaces 19.11 and later releases, click Apply to make the filter active.

NOTE

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.

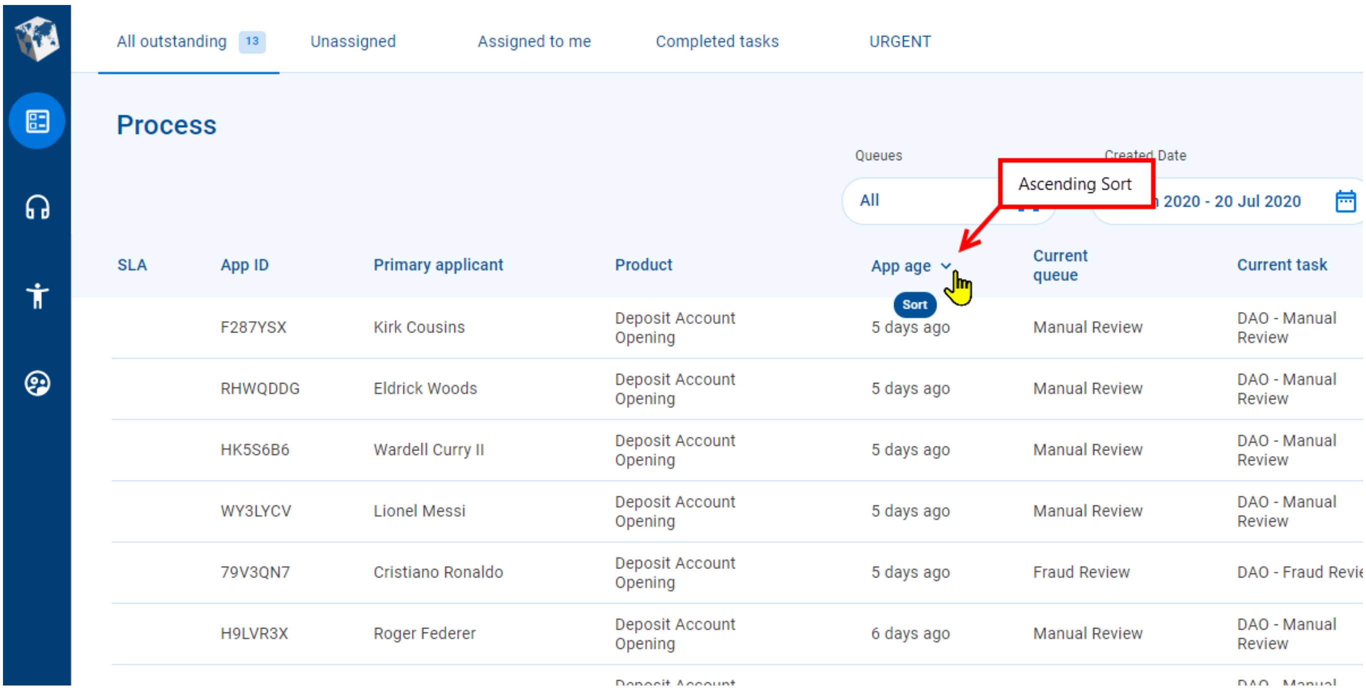
NOTE

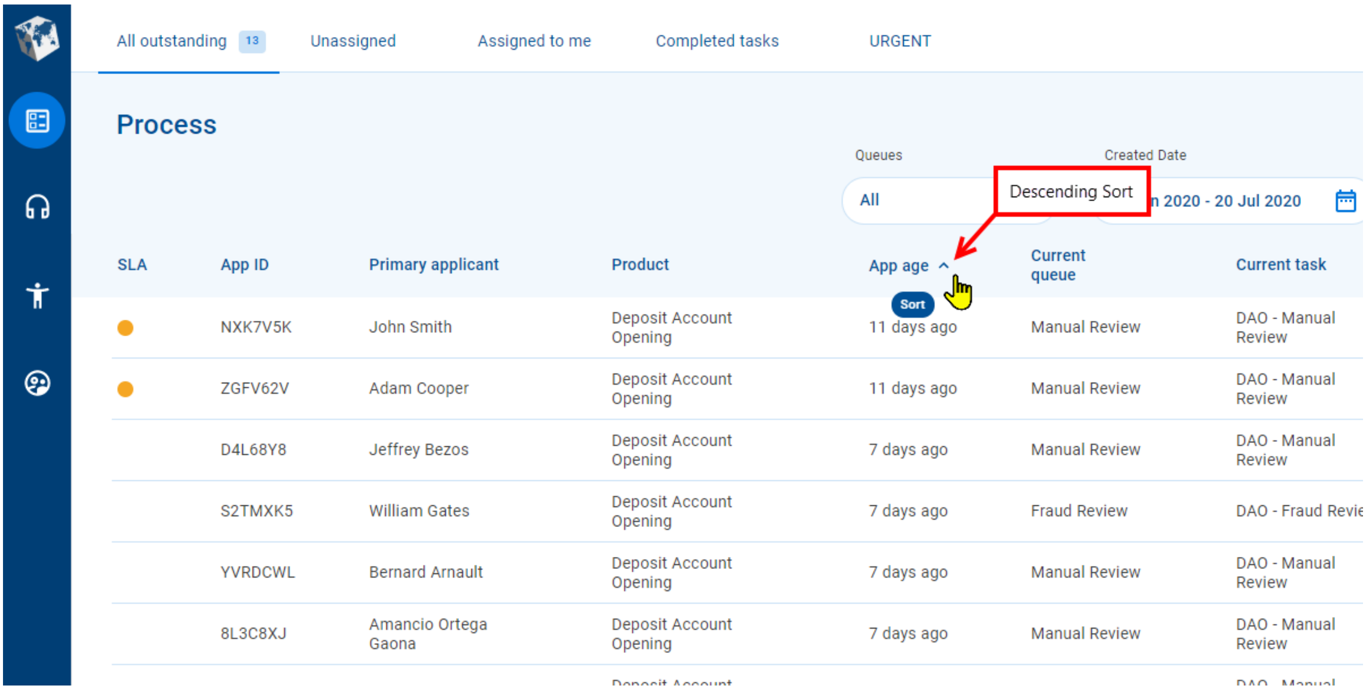
When you clear all filters, the current view remains selected and any filters defined for that view are still applied or re-applied if you had changed them.

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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Workspaces portal.

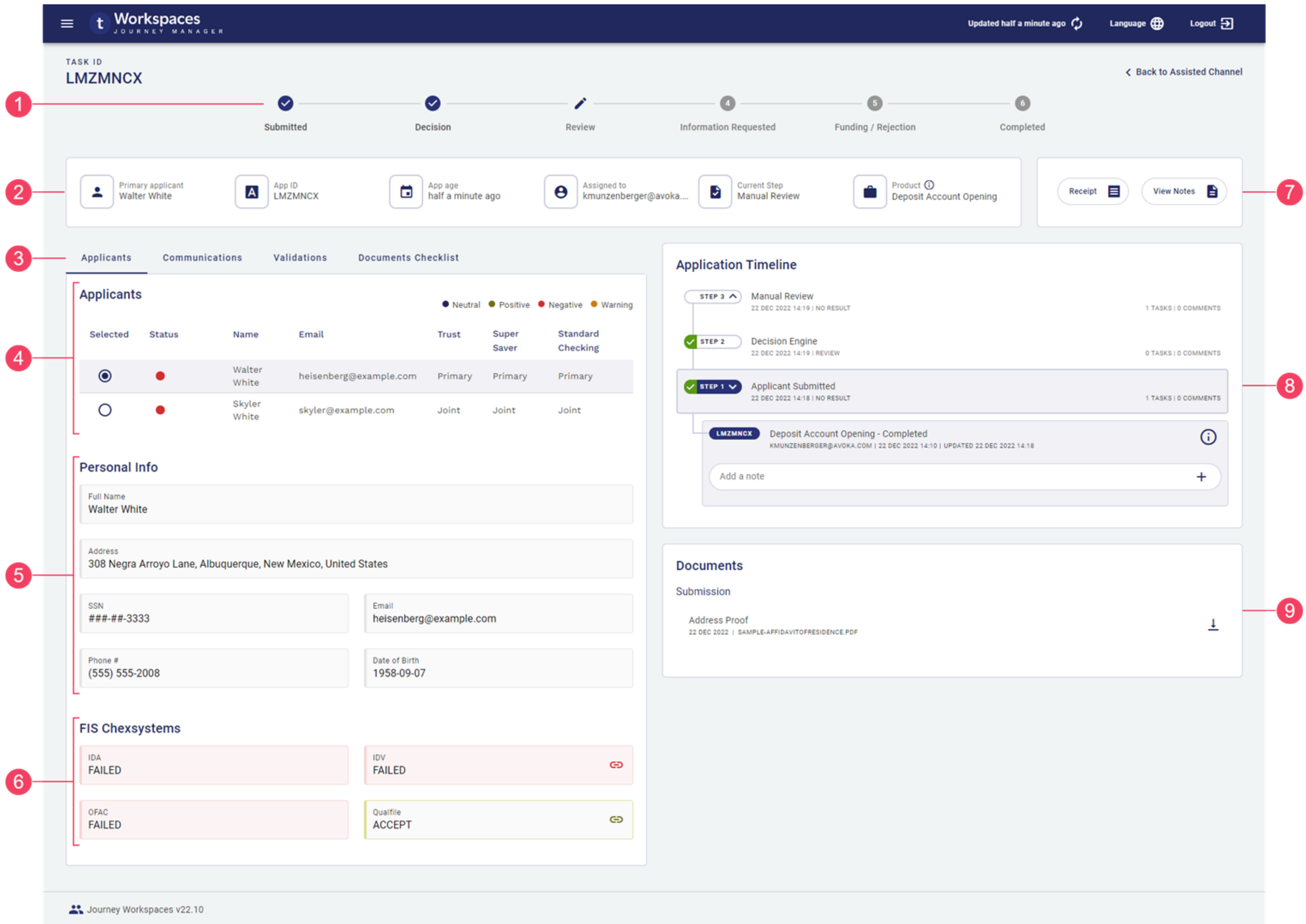
Overview

The Application Details Screen, as the name suggests, displays information about an individual application and its associated tasks, and provides features for you to complete the tasks, thereby progress the application through its processing life cycle.

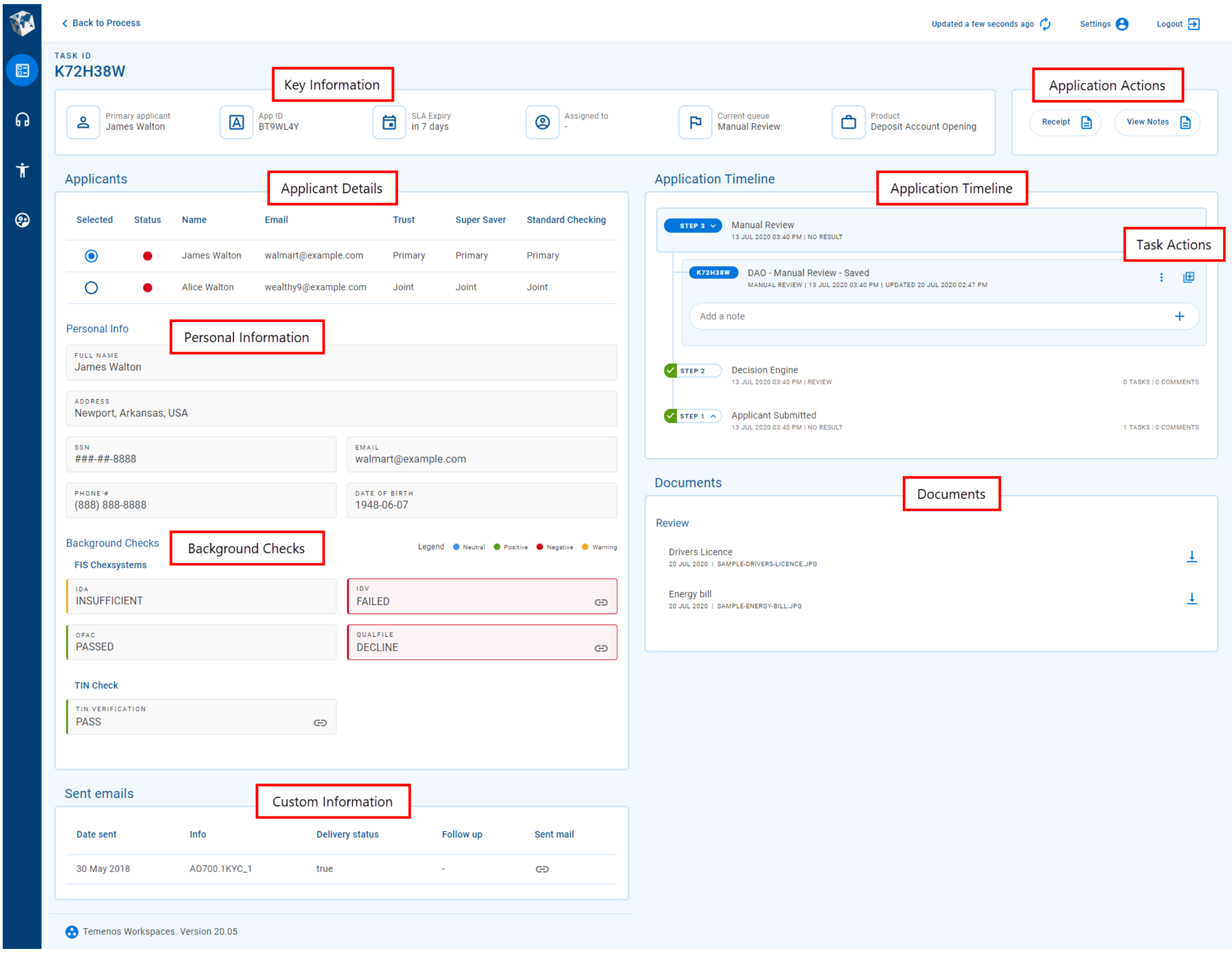
The Details screen is displayed when a user clicks an application or task in an item list on a List screen, and the information displayed is reloaded when the use clicks a task in the Application Timeline. Application information is displayed in the context of a specific task, being either the first task for a saved application or any selected task for a submitted application. Additional information may also come from another task or the application data.

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.

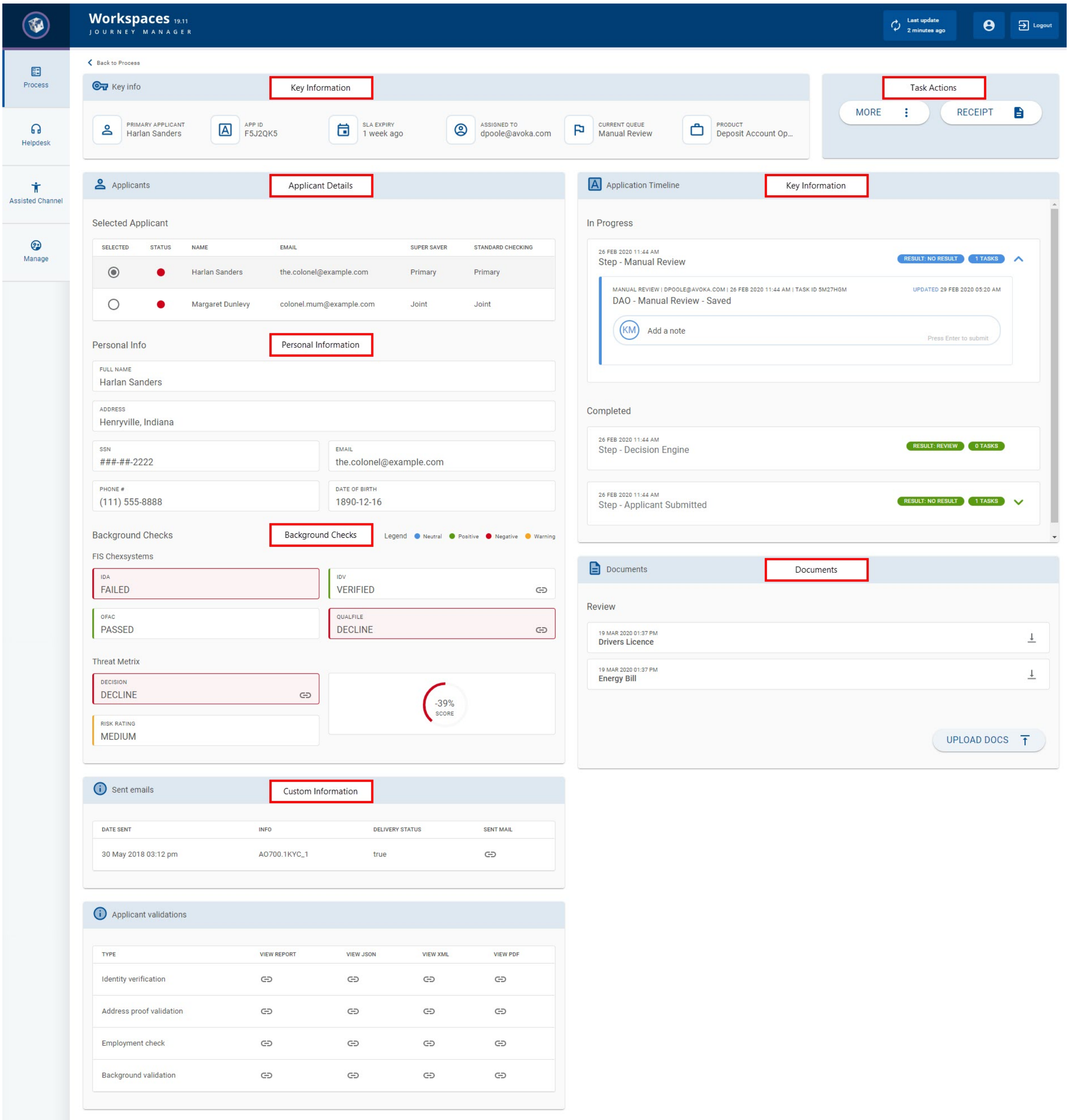
- 22.10
- 20.05 - 22.04
- Prior to 20.05



1. Progress stepper
2. Key Information
3. Detail tabset
4. Applicants
5. Personal Information
6. Background checks
7. Application actions
8. Application Timeline
9. Documents



The Application Details Screen



Features

The Details screen includes the following features, each of which is contained in a separate tab, card, or card section.

- An optional progress stepper showing a high-level indication of the selected application's progress. By default, this is available for the Helpdesk and Assisted Channel spaces only.

22.10This feature was introduced in the 22.10 release

- Key information about the selected application and its tasks.
- A set of standard actions that you can perform at the current stage of the application's life cycle.
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release

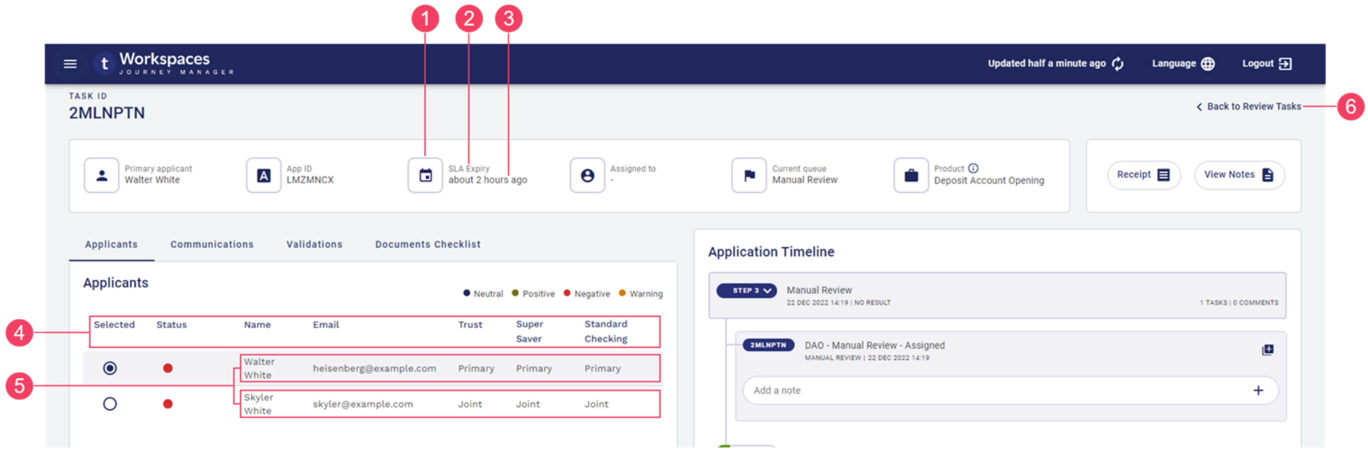
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details. 19.11This feature was introduced in the 19.11 release
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability. 19.11This feature was introduced in the 19.11 release

  The other custom information, shown on additional tabs, includes:
  - Any other custom information that is not included in the standard cards, or that is presented differently.
- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release
- 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. 20.05This feature was introduced in the 20.05 release
- Attached documents relating to the application. 19.11This feature was introduced in the 19.11 release | 22.10This feature was updated in the 22.10 release

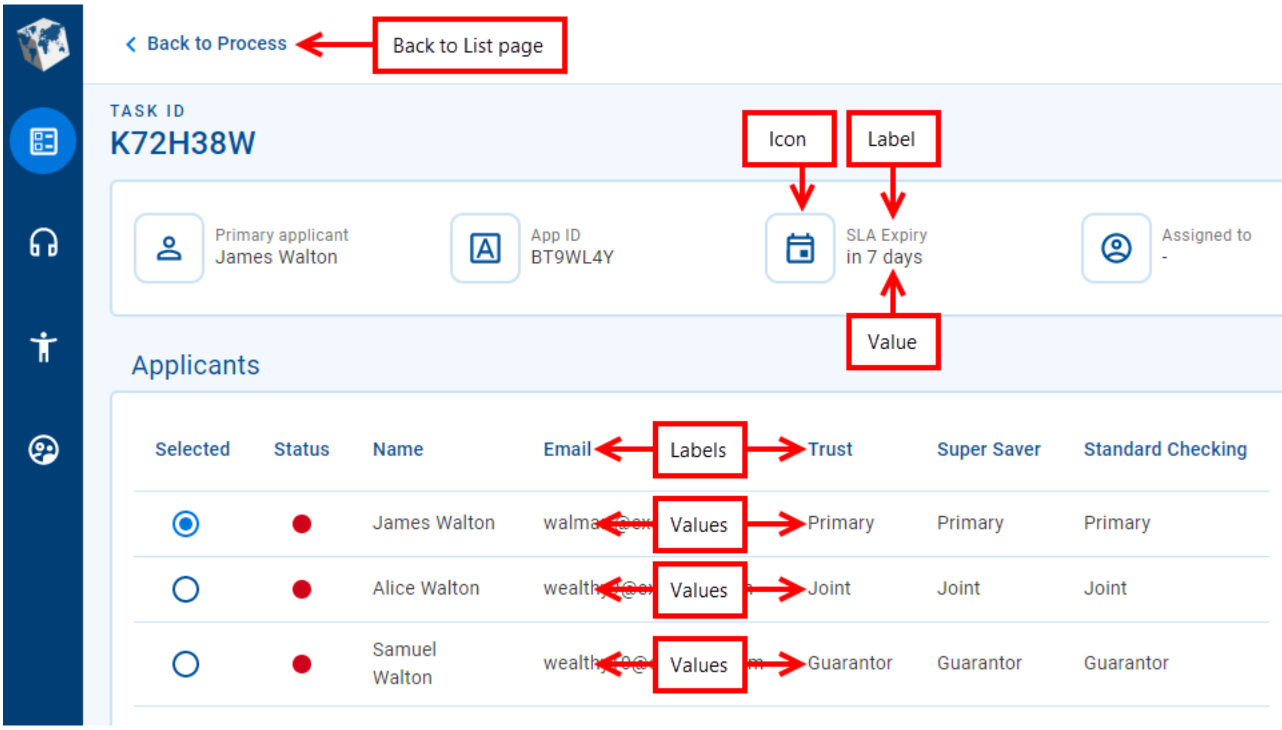
Data items

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.

- 22.10
- Prior to 22.10



1. Icon
2. Label
3. Value
4. Table labels
5. Table values
6. Back to List screen



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.

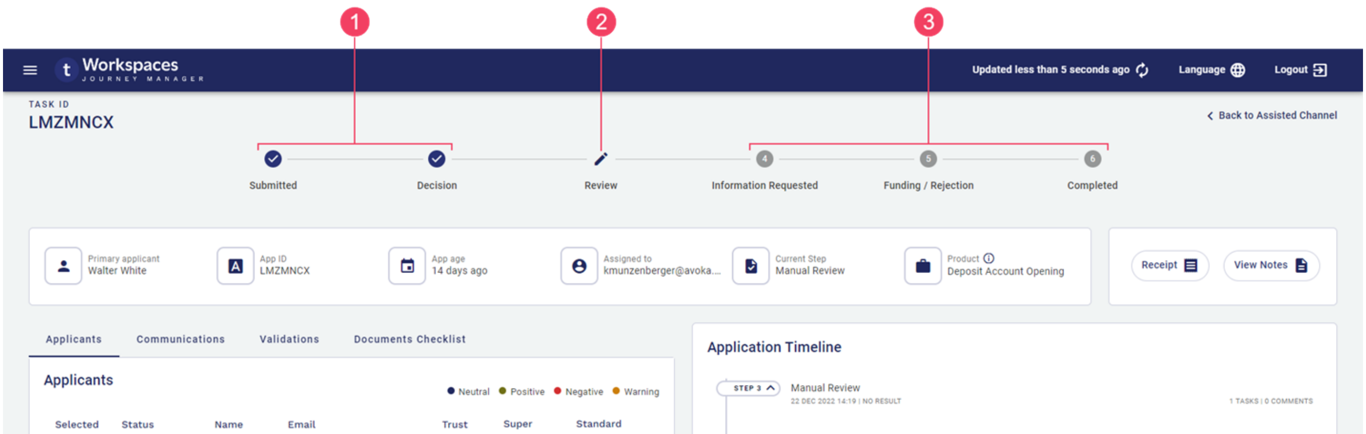
Sometimes a value might be too long to fit in the space available for it; in this case, the value is often truncated and an ellipsis ('...') is appended to indicate that you're not looking at the full value. To see the full value, point your cursor at the truncated value and a tool tip is displayed showing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

Progress stepper

The progress stepper is an optional component that provides a non-interactive graphical progress display relating to the steps in the application life cycle of submitted applications. Current, completed and pending steps are differentiated visually, allowing the user to see application progress at a glance. By default, the progress stepper is available for the Helpdesk and Assisted Channel spaces only.



1. Completed steps
2. Current step
3. Pending steps

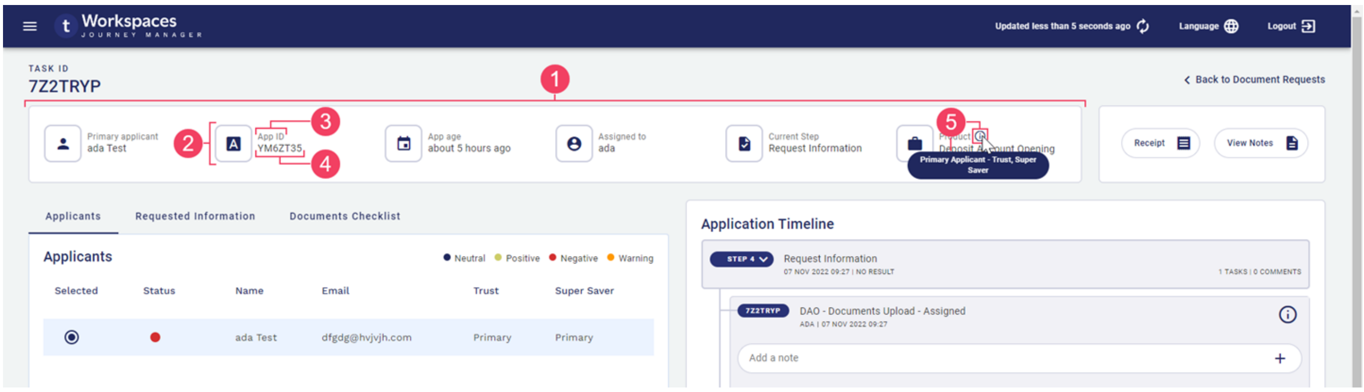
Note

The progress stepper is hidden for saved applications. It is displayed once an application has been submitted.

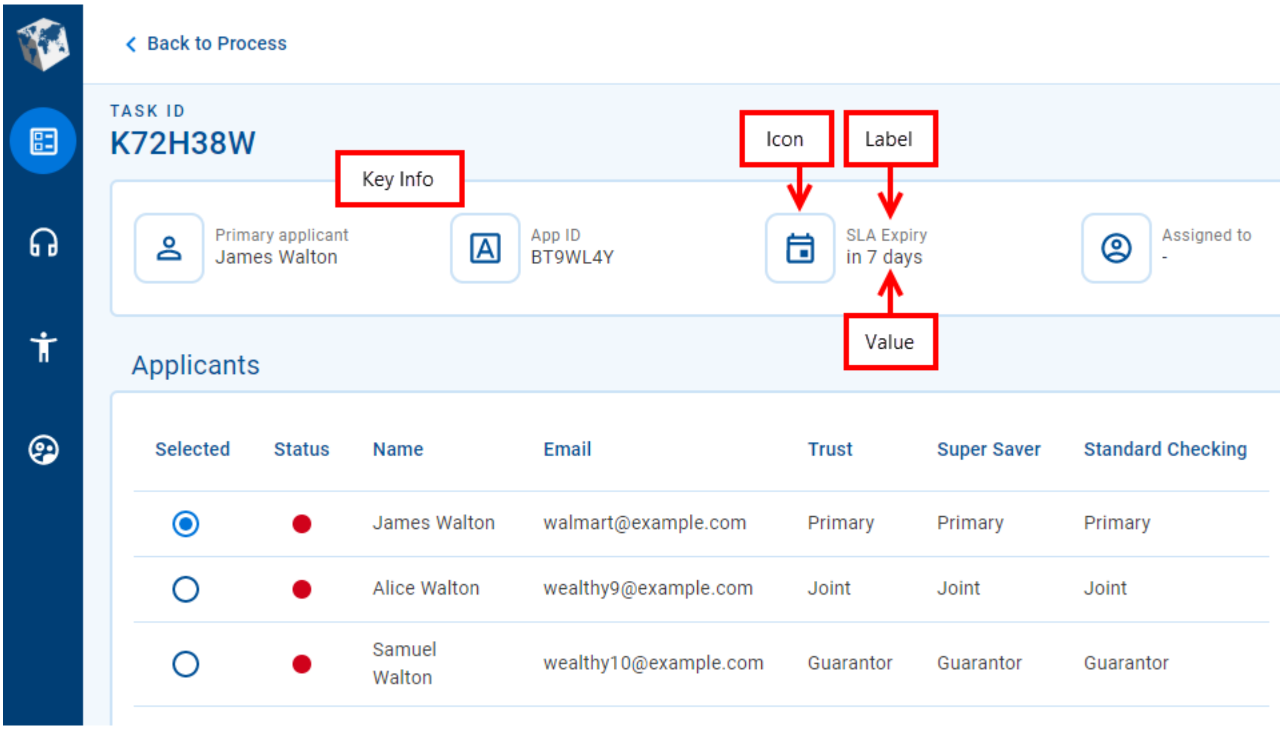
Key Information

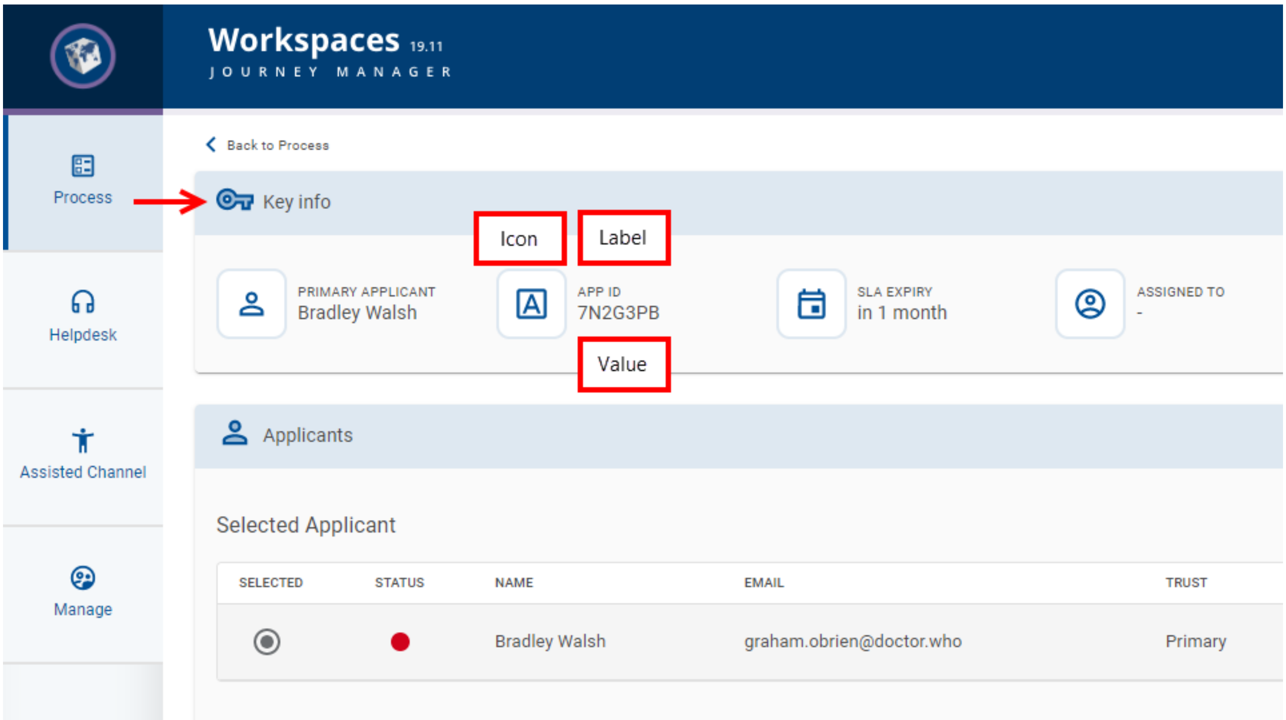
The Key Information card displays important application information that's handy for Workspaces staff to have at their fingertips.

- 22.10
- 20.05 to 22.04
- Prior to 20.05



1. Key Info card
2. Icon
3. Label
4. Value
5. Tooltip





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.

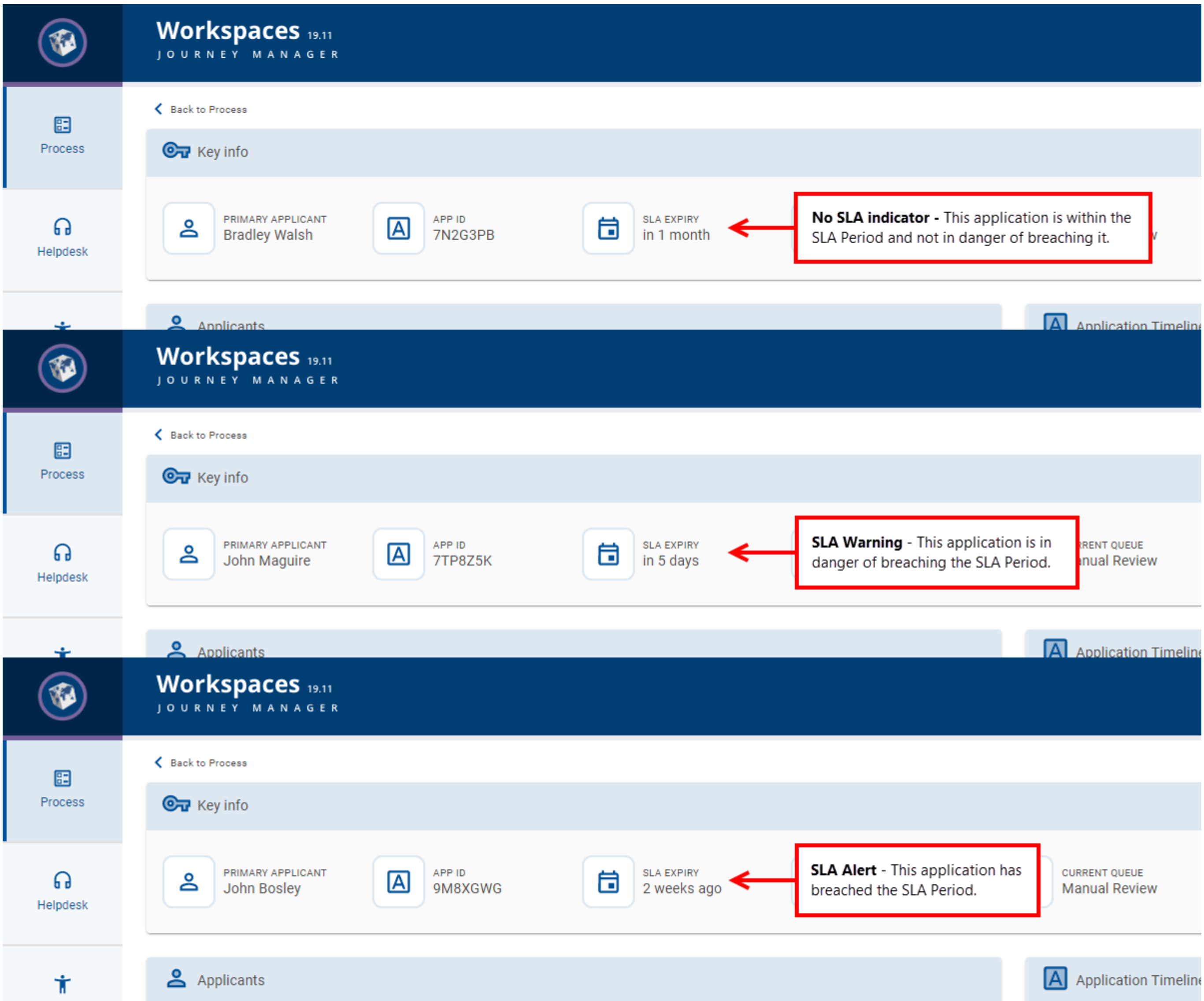
Each key info item can only show a single value. However, additional values can be displayed using a tooltip, indicated by the info (Tooltip) icon. For example, say you have an application covering multiple products. While the Product key info item displays only the first product, a tooltip can be configured to show all of the products covered by the application. To view the tooltip, point your mouse at the info (Tooltip) icon. | 22.10 This feature was introduced in 22.10.

The value displayed in the Product key info item may correspond to a form group. If this is the case, the specific form associated with the task is displayed as the Product. | 22.10 This feature was introduced in 22.10.

SLA Expiry

> NOTE
>
> 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 screen, 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 screen, the SLA Expiry field does not explicitly indicate when an application is in the SLA Warning period.

Actions

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.

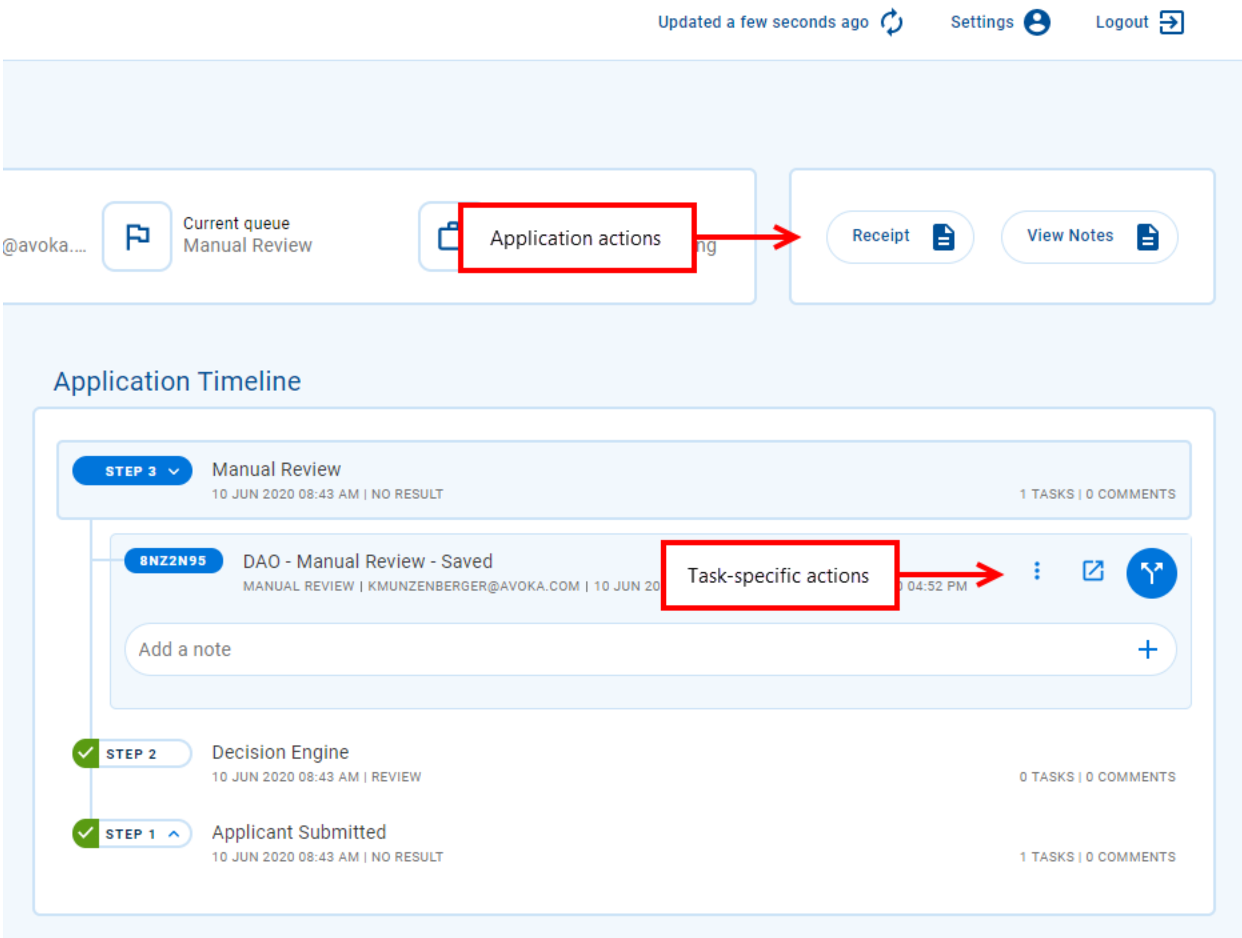
NOTE

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 (20.05 and later)

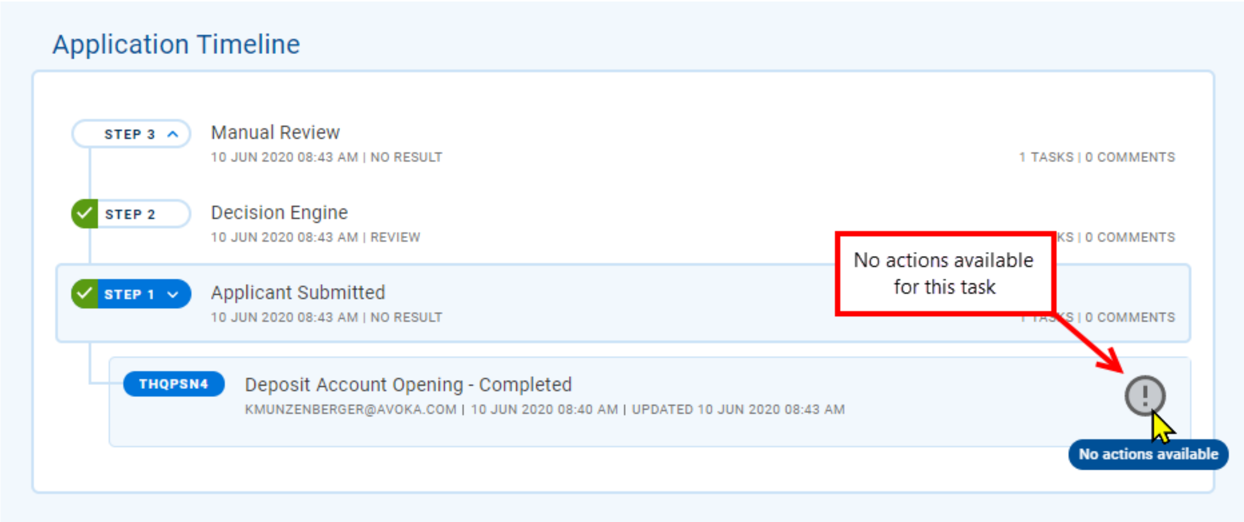
Standard actions can be performed from any Details screen. The way actions are made available on a Details screen varies depending upon whether the action relates to an application or a task.

- **Application actions** are accessed via buttons in the Action panel to the right of the Key Info card.
- **Task actions** are accessed via icon buttons on each task in the Timeline.



Different actions may be available for each task. This is 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 Assign action will be available only for tasks that aren't assigned to a user.

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.



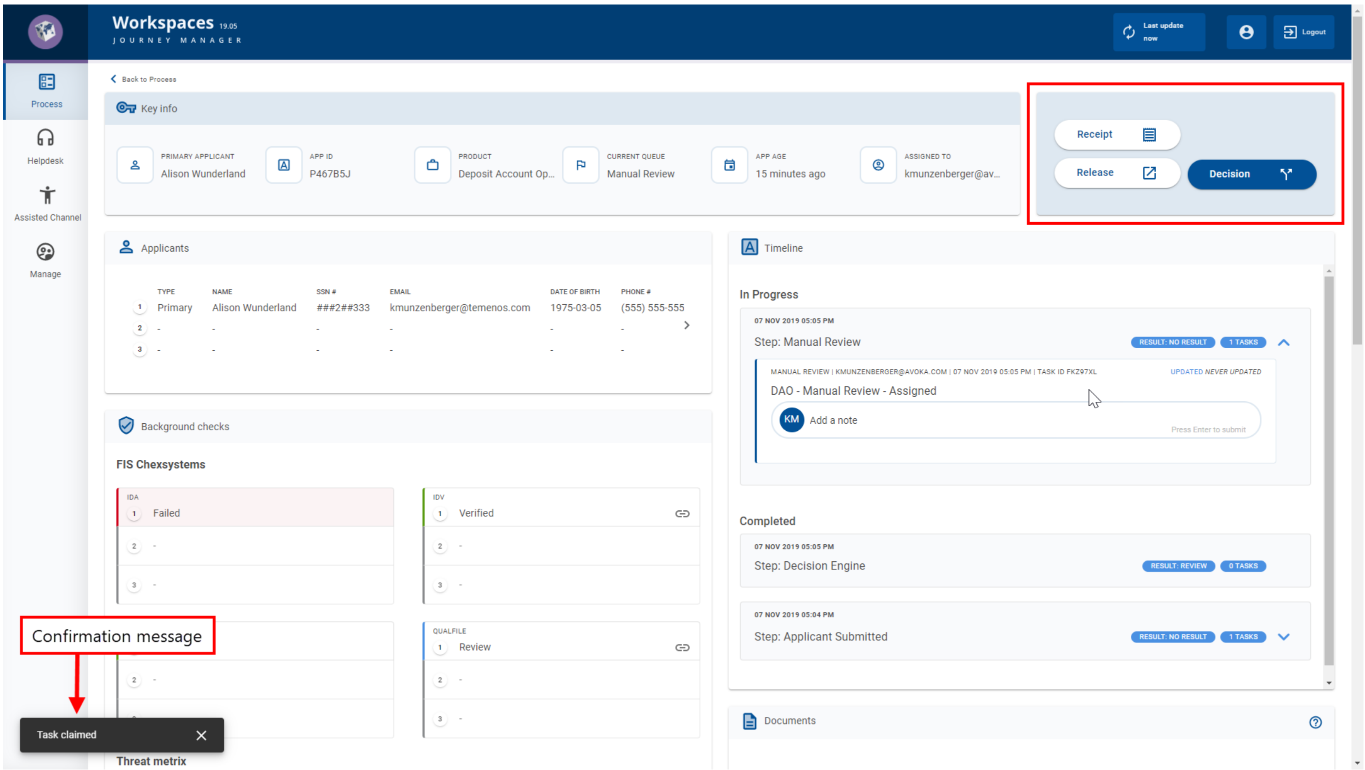
To perform a standard action, click the application or task button corresponding to the desired action. Most standard actions will display a brief message in the bottom right corner of the screen confirming that your desired action was successful or notifying you that something went wrong.

Standard Actions (19.11 and earlier)

Standard actions can be performed from any Details screen using the buttons in the Action panel to the right of the Key Info card.

Different actions may be available for each task. This is 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 Assign action will be available only for tasks that aren't assigned to a user.

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

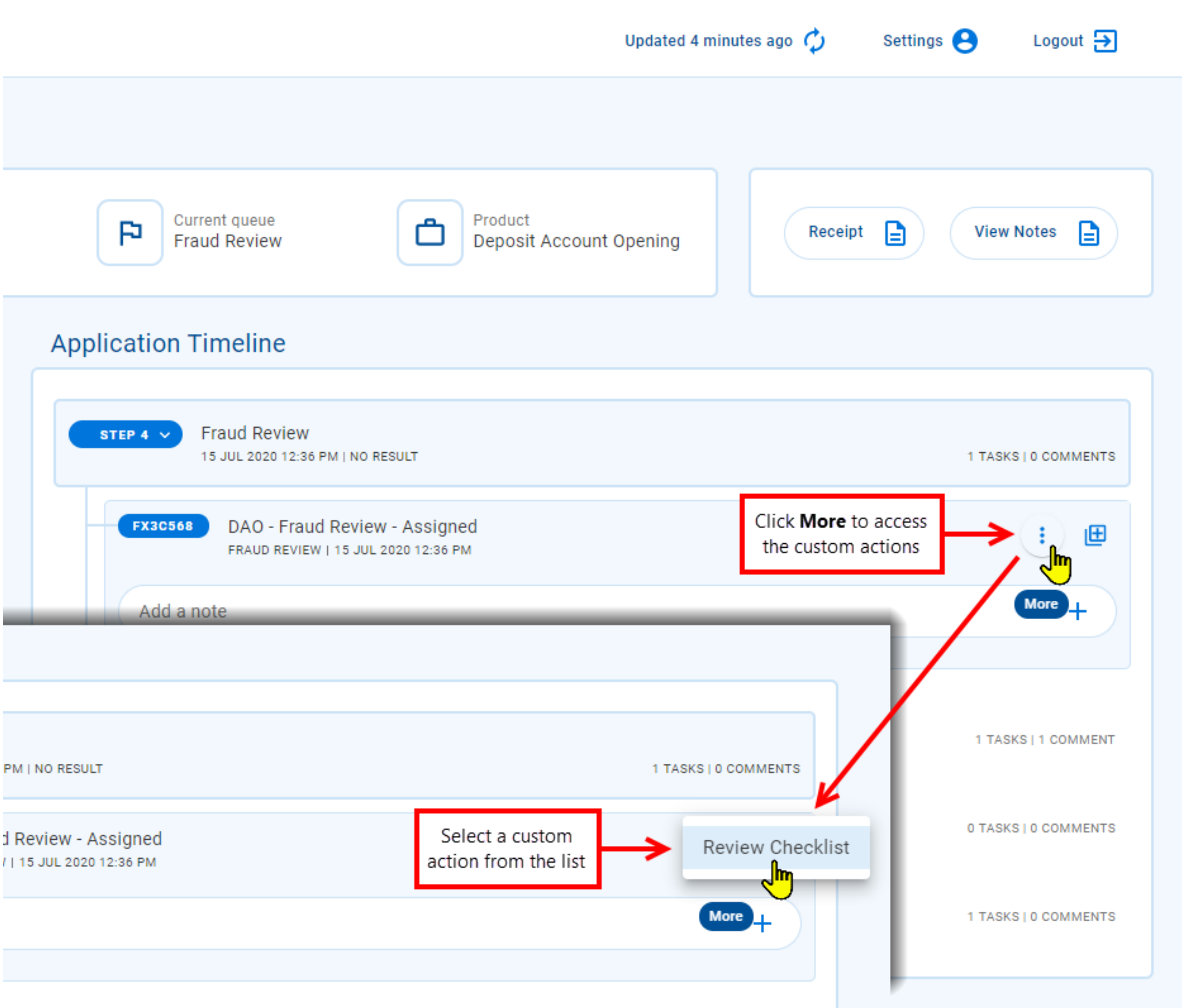
Custom actions use third-party web services or fluent functions to extend the functionality of your Workspaces portal with features that are not available in the default configuration. Custom actions can be performed from a Details screen only.

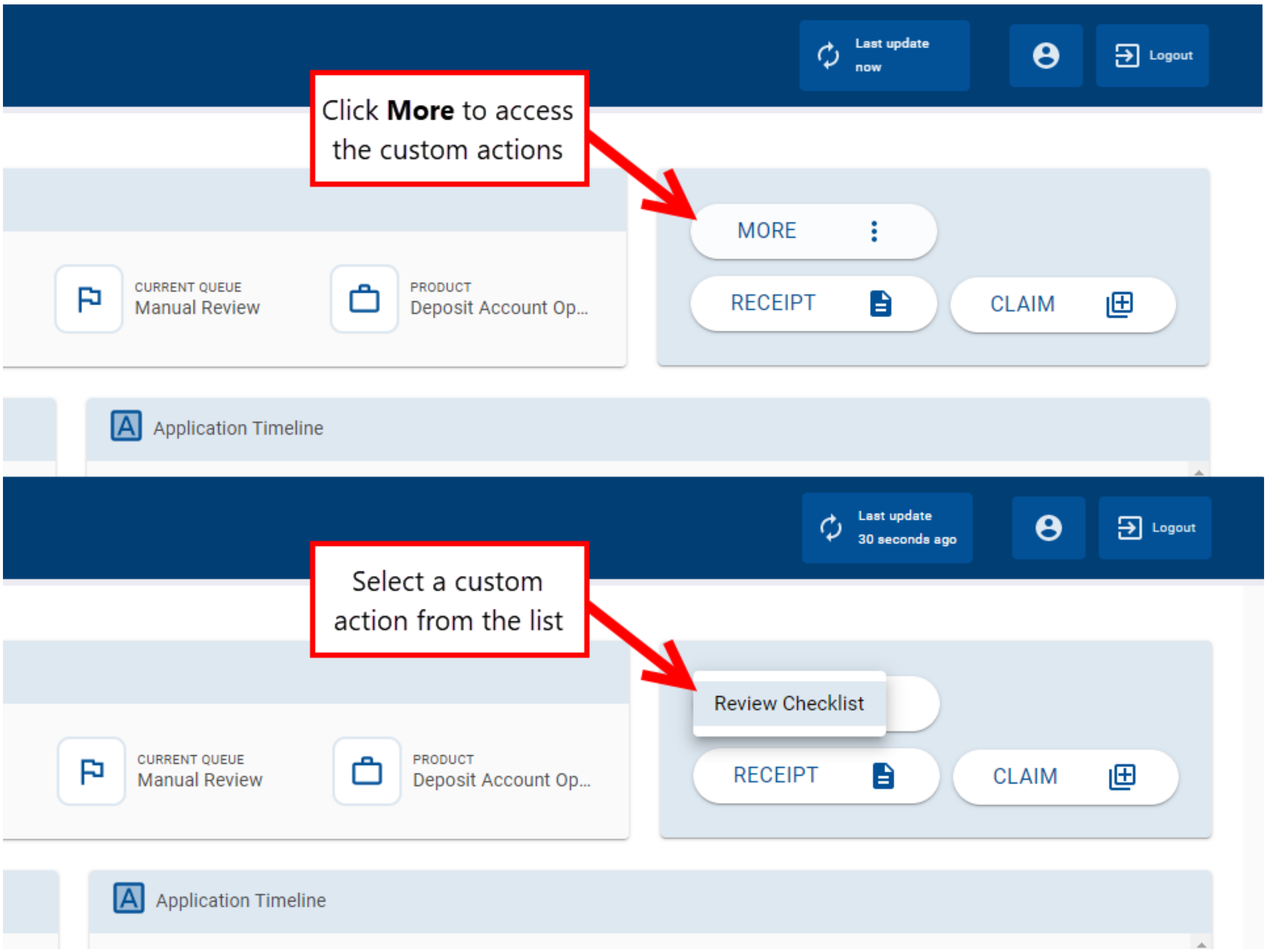
NOTE

There are no custom actions in the default Workspaces configuration. Any available custom actions, and what they do, are specific to your Workspaces portal and are not covered by this documentation.

To perform a custom action, click the More button then select the desired action from the list displayed. Workspaces triggers the custom functionality in Journey Manager or another back-end system. What happens next depends on the configuration of the custom action, and user interaction may be required. Once the custom behavior is complete, Workspaces refreshes the screen.

- 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
PM | NO RESULT
1 TASKS | 0 COMMENTS
0 TASKS | 0 COMMENTS
d Review - Assigned
/ | 15 JUL 2020 12:36 PM
Select a custom action from the list
Review Checklist
More
1 TASKS | 0 COMMENTS



Applicant Information

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

The way applicant information is presented varies for different releases.

- **22.10 and later:** Applicant information is displayed in the Applicants tab. At the top is an Applicants section from which you can select an applicant to see their specific 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.

displayed below in the Personal Info section and the various background check sections.

- **19.11 to 22.04:** Applicant information and background checks are 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.
- **Prior to 19.11:** Applicant information and background checks are displayed in two separate cards, Applicants and Background Checks, and all information for all applicants is displayed simultaneously.

Applicant Information (19.11 and later)

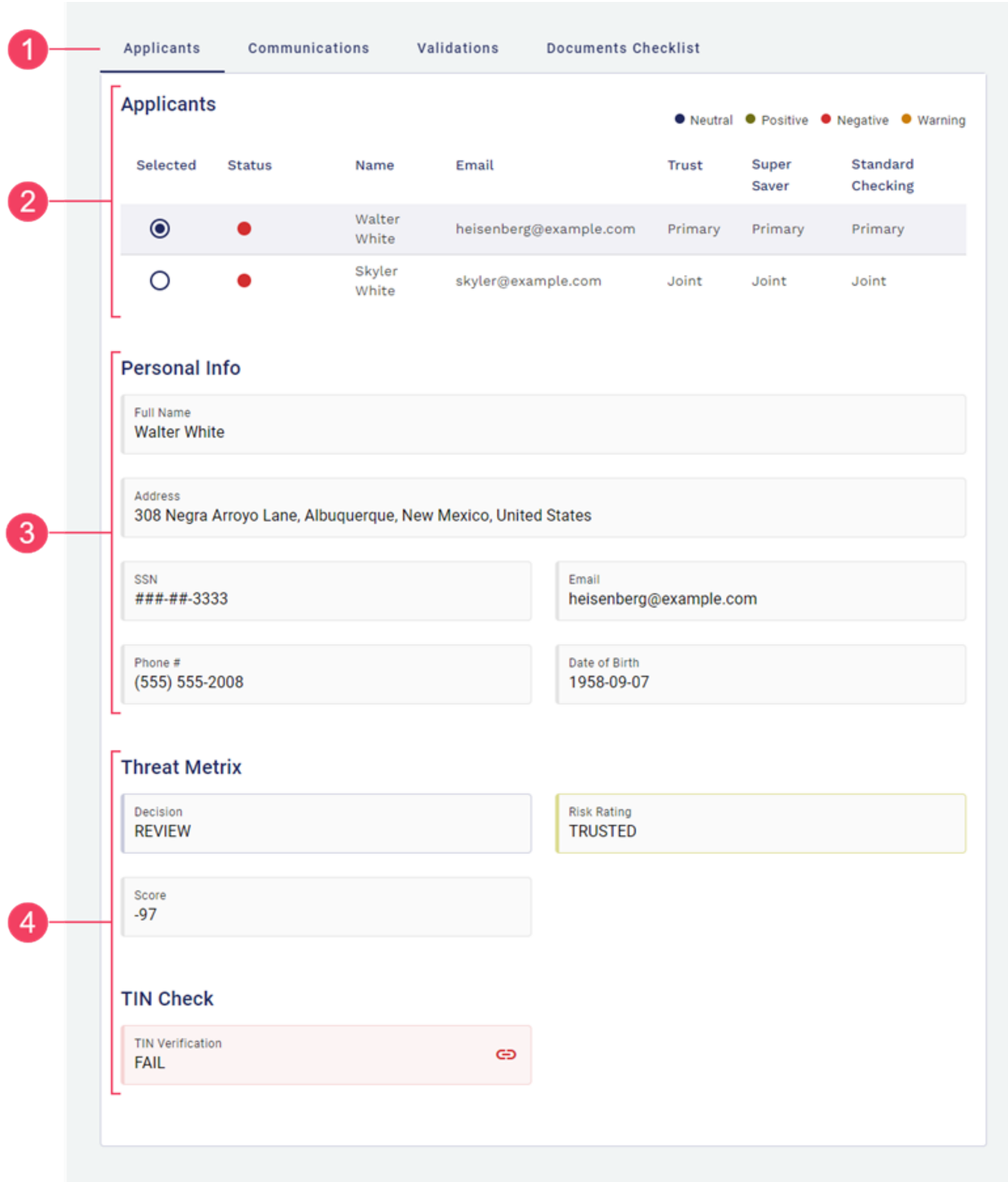
Applicant information is grouped together under the Applicants tab (22.10This feature was introduced in the 22.10 release) or card (prior to 22.10). In the default configuration, applicant information is displayed using the same three-section layout in all spaces:

- **Applicants:** The list of applicants, with some key applicant-related information. This is where you select an applicant to show more information about them. (Prior to Workspaces 22.10, this section is called Selected Applicant.)
- **Personal Info:** A read-only view of the selected applicant's personal information, also known as PII[1] .
- **Background checks:** The outcomes for various checks or verifications relating to the selected applicant.

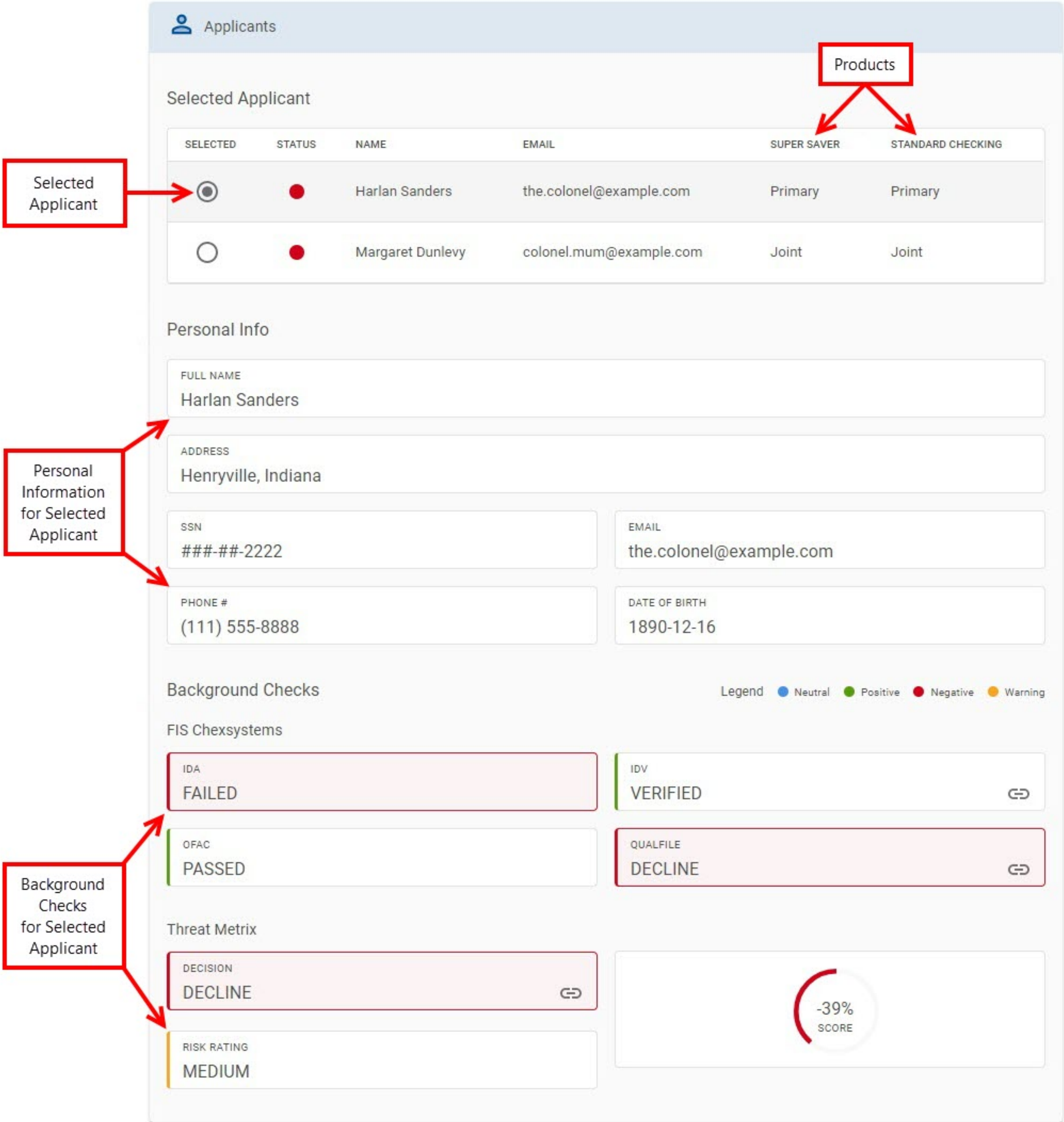
> INFO
>
> Background checks are highly configurable. The specific background checks in your Workspaces portal are configured for you by a Journey platform developer and cannot be changed by a Workspaces user.

- 22.10
- Prior to 22.10

[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.



1. Applicants tab
2. Applicants section
3. Personal Info section
4. Background checks sections



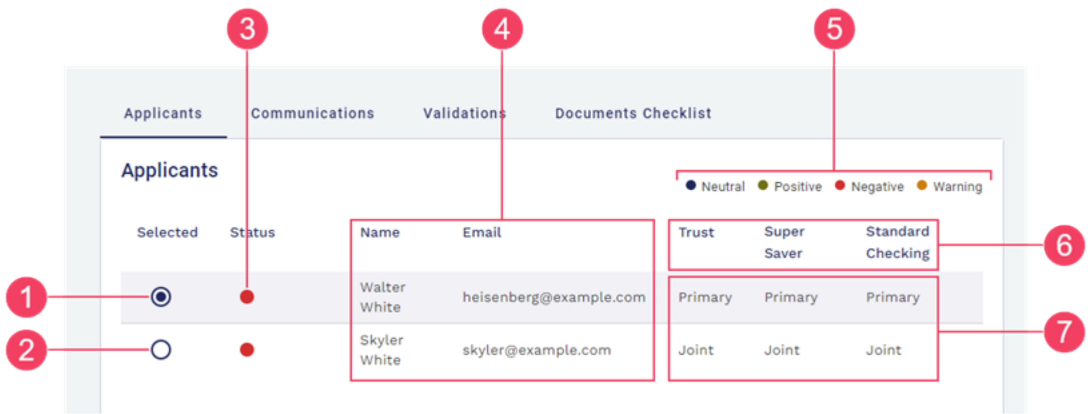
Applicants section

As mentioned above, the Applicants 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 section and the various background check sections. (Prior to Workspaces 22.10 all of the background checks were grouped in a section called Background Checks.)

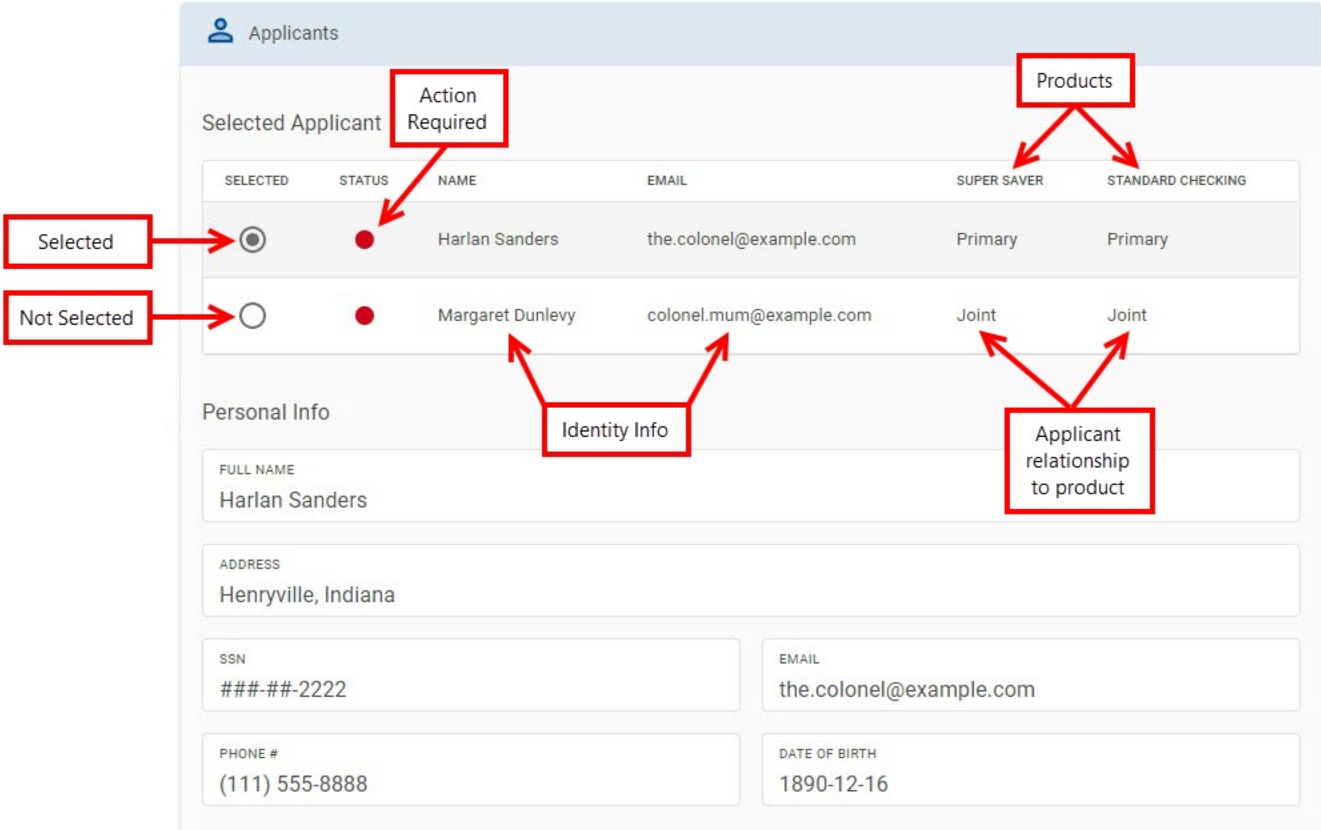
In the default configuration, the key applicant-related information shown for each applicant includes:

- 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).
- A column for each product applied for, showing the relationship of each applicant to each product.

- 22.10
- Prior to 22.10



1. Selected applicant
2. Other applicant (not selected)
3. Action required
4. Applicant identity information
5. Products
6. Applicant-Product relationship
7. Legend



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 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 the 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 section

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

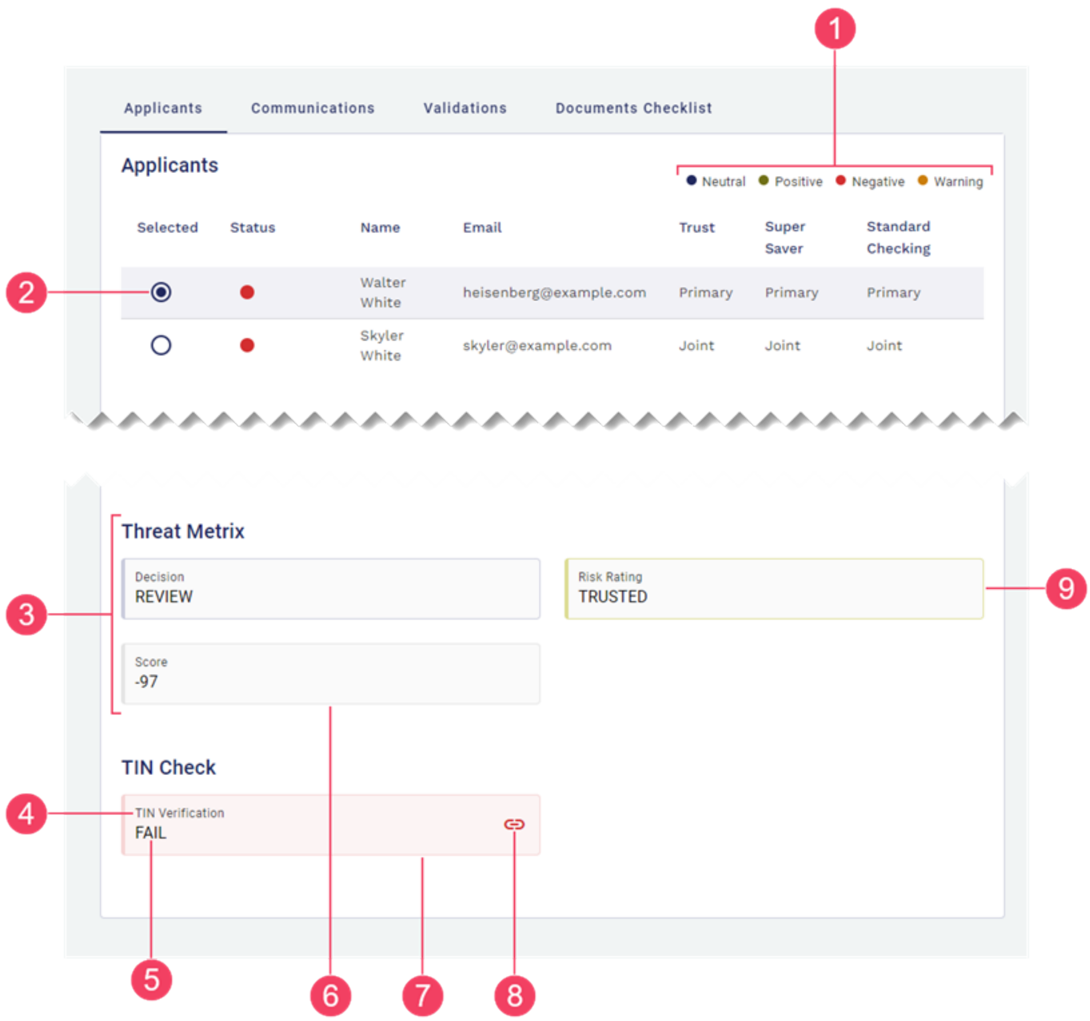
Background checks

The background checks present a read-only view of the outcomes of various checks or verifications relating to the applicantsselected applicant. Examples of checks and verifications that might appear here include identity verification and risk rating. Background checks are displayed in groups, showing the name of each background check and the corresponding result. Any background check for which a result is not available is shown with no data.

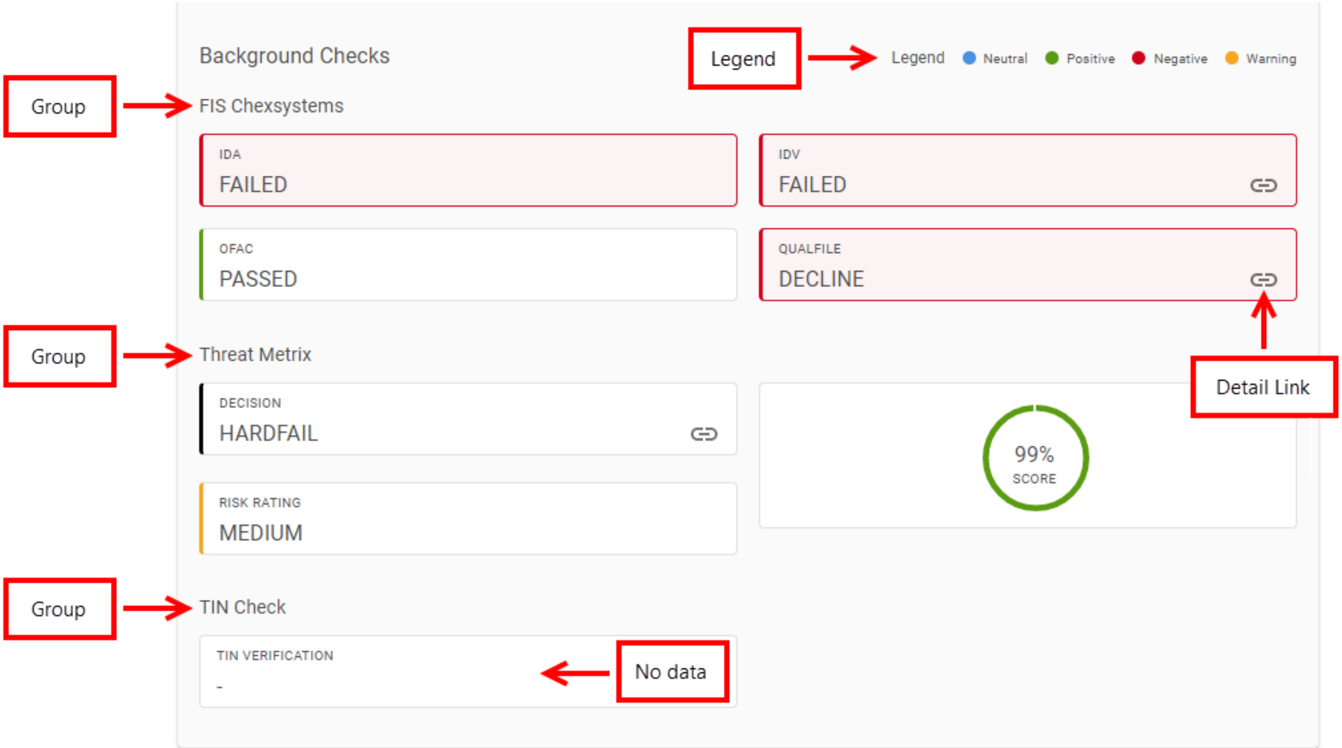
- 22.10
- Prior to 22.10

---

[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.



1. Legend
2. Selected applicant
3. Background check group
4. Background check name
5. Background check result
6. Neutral outcome
7. Negative outcome
8. Detail Link
9. Positive outcome



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. A legend at the top of the Applicants section (22.10) or Background Checks section (prior to 22.10) identifies the principle background check colors and what each color indicates.

The standard colors are listed below, along with suggestions for what they might indicate.

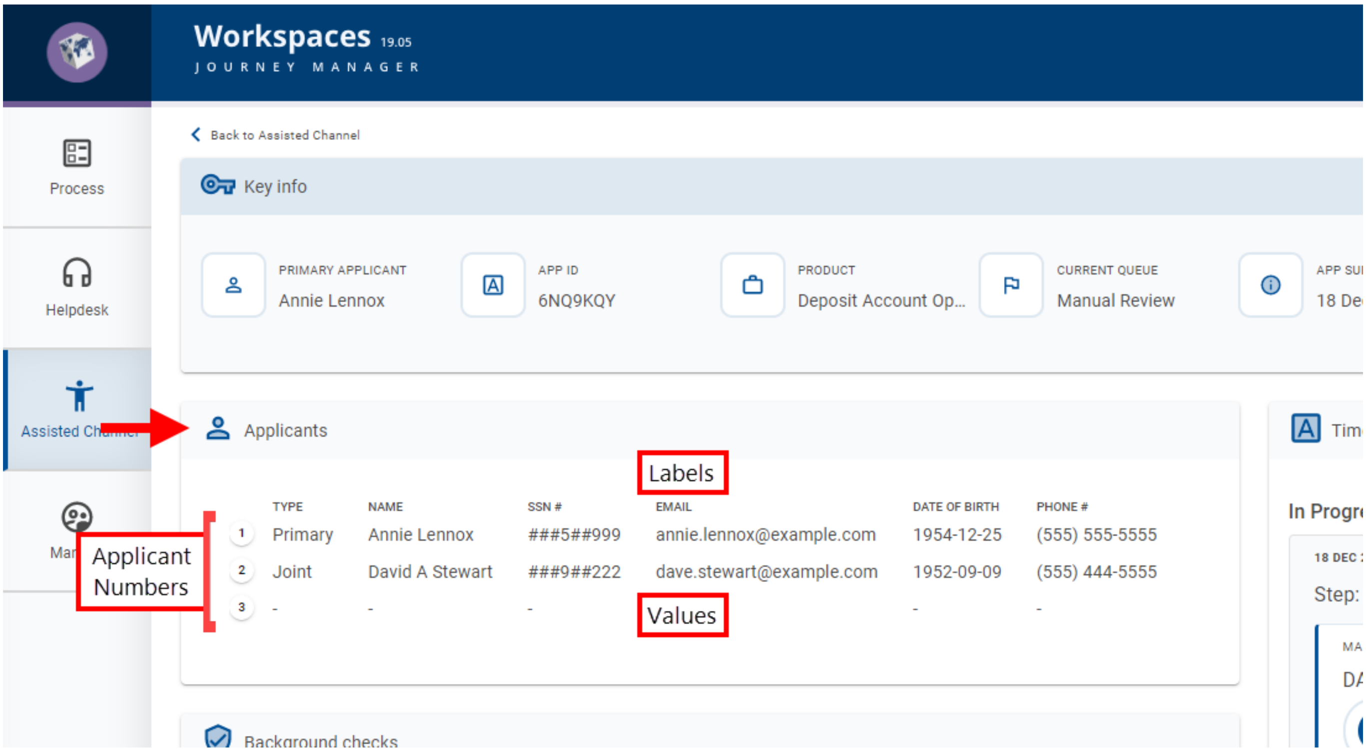
- **Green, Light Green:** Indicate positive results.
- **Red, Black:** Indicate negative results.
- **Blue:** Used for neutral states.
- **Orange:** Represents intermediate or other states.

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 in a modal window.

Applicant Information (19.05 and earlier)

Applicant Details

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



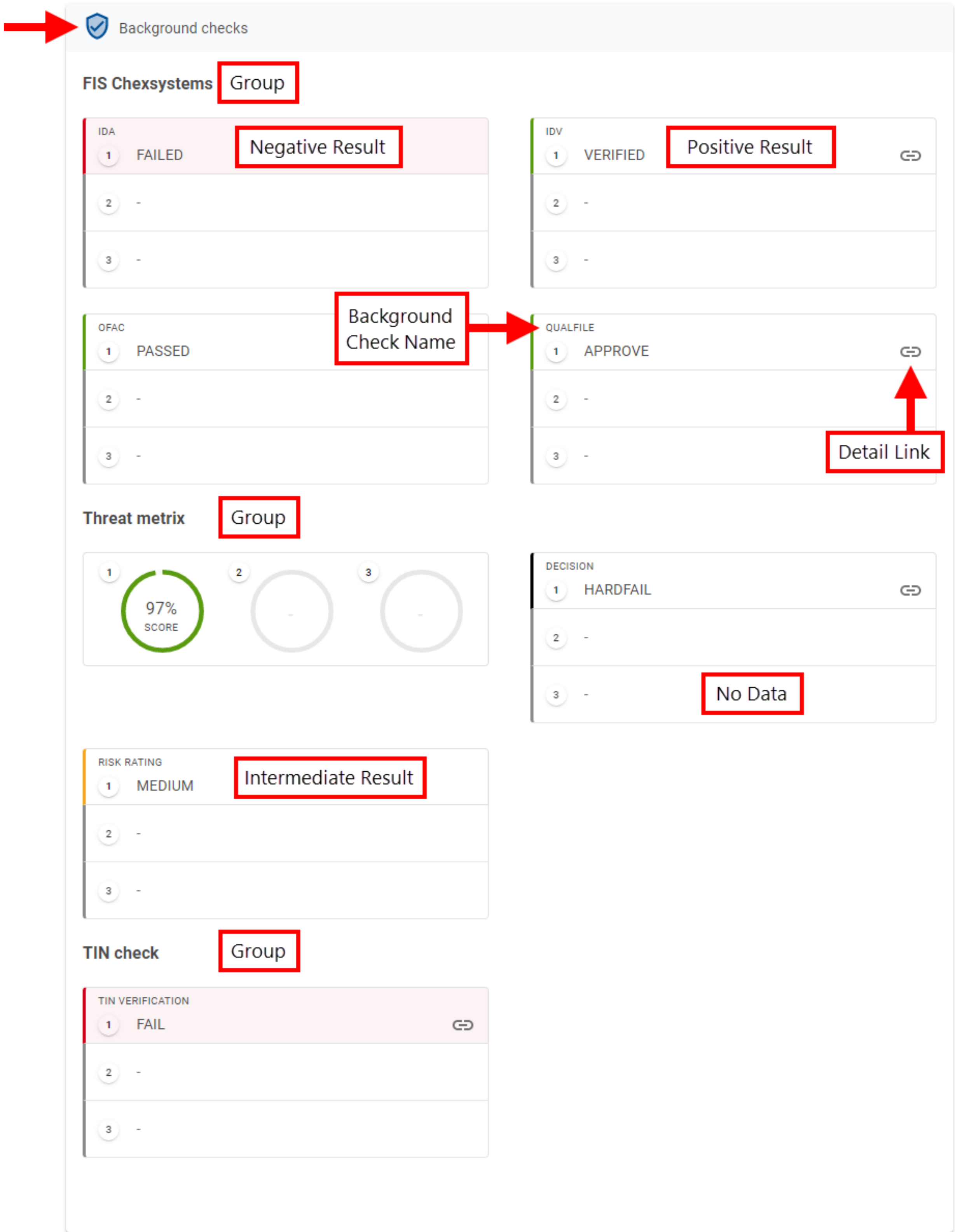
Personal information, which could include Personally Identifiable Information (PII) such as full name or email address, is displayed for primary and secondary applicants, with each applicant's details shown separately. A minimum of three applicants are shown; if there are less than three applicants, 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.

> NOTE
>
> 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 present a read-only view of the outcomes of various checks or verifications relating to the applicantsselected 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. 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.

> NOTE
>
> 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.

The standard colors are listed below, along with suggestions for what they might indicate.

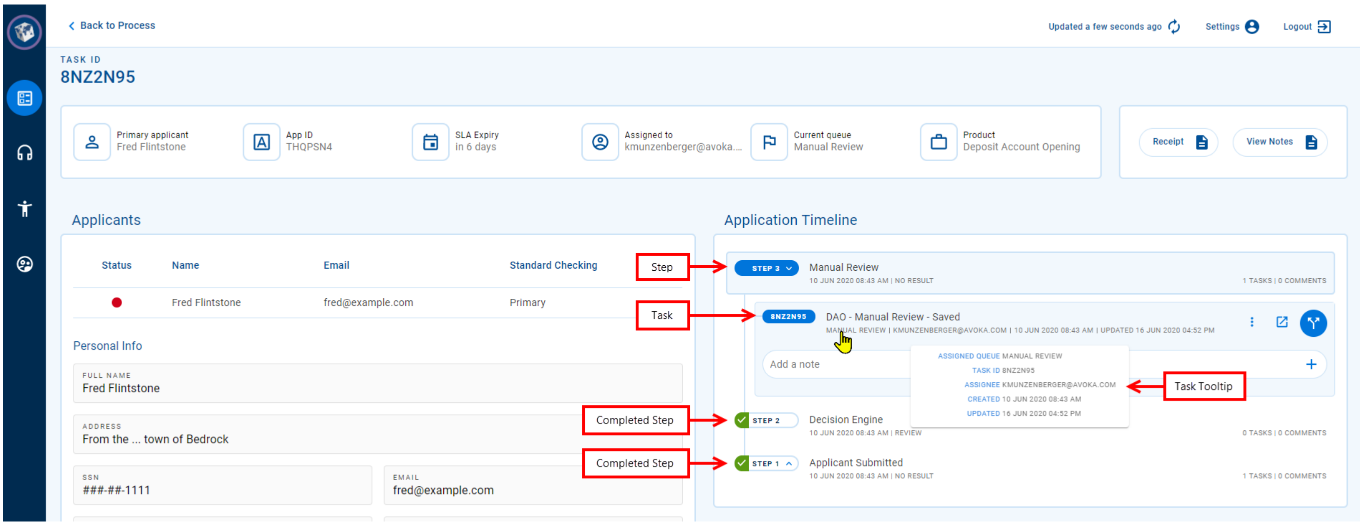
- **Green, Light Green:** Indicate positive results.
- **Red, Black:** Indicate negative results.
- **Blue:** Used for neutral states.
- **Orange:** Represents intermediate or other states.

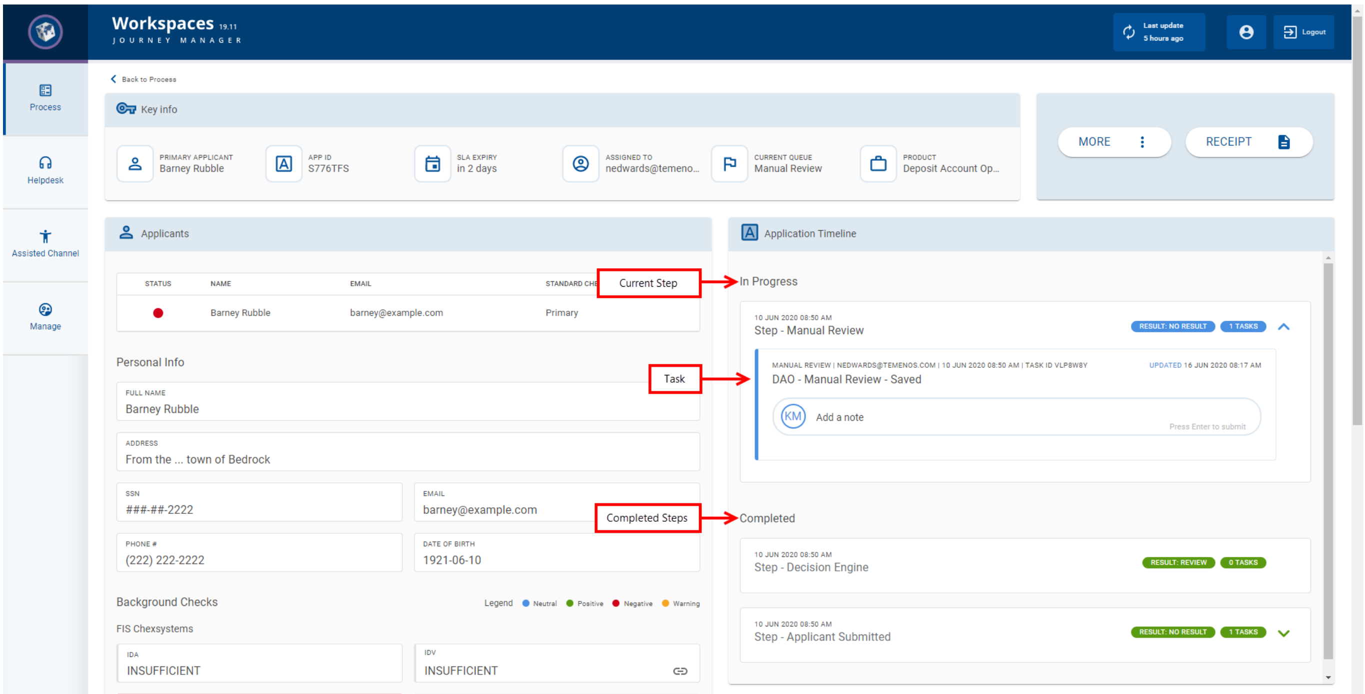
Some background checks have additional information associated with them which can be useful to understand how the result was determined. The availability of additional information is indicated by a (Detail Link) icon to the right of the result; click the link to view the additional information in a modal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

Application Timeline

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

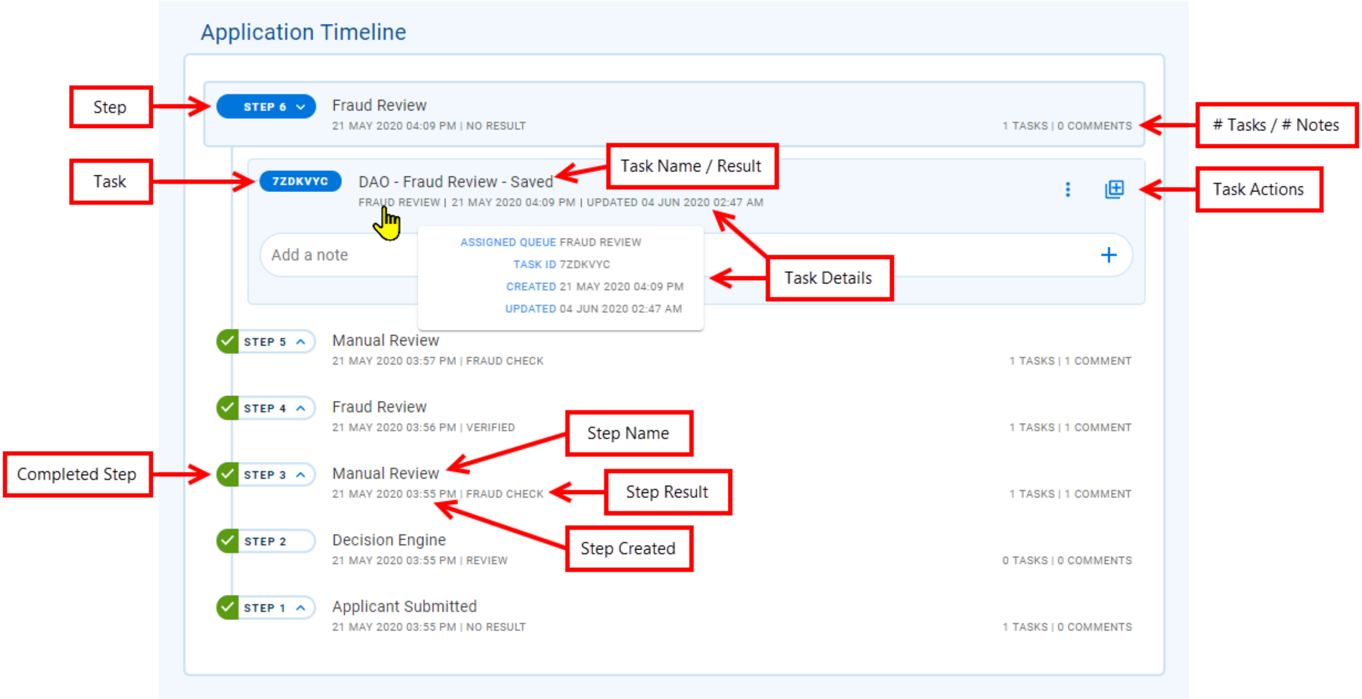
- 20.05 and later
- Prior to 20.05





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 (20.05 and later)



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.

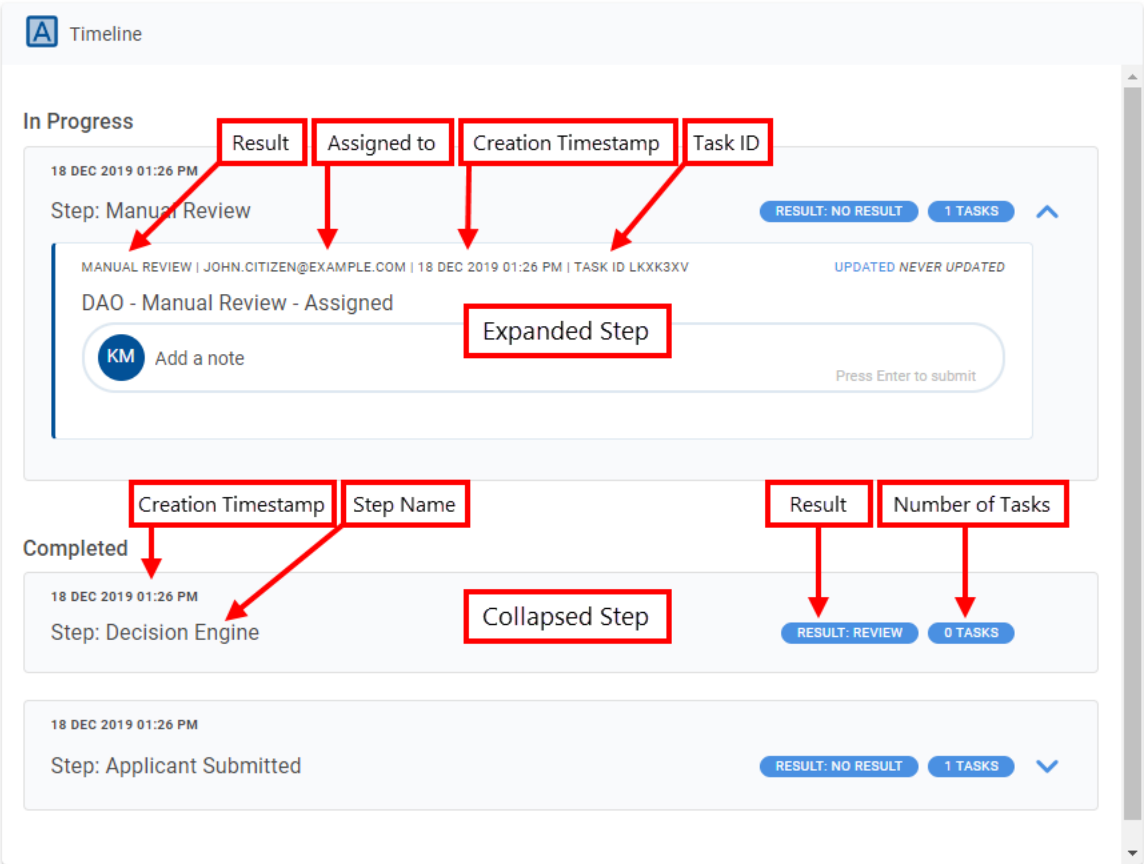
This information can also be viewed in a formatted tooltip that appears when you point your cursor at the task.

When a step is expanded, you can select one of its tasks which causes the Details screen 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.

NOTE

The Note field is limited to 2000 characters.

Application Timeline (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.

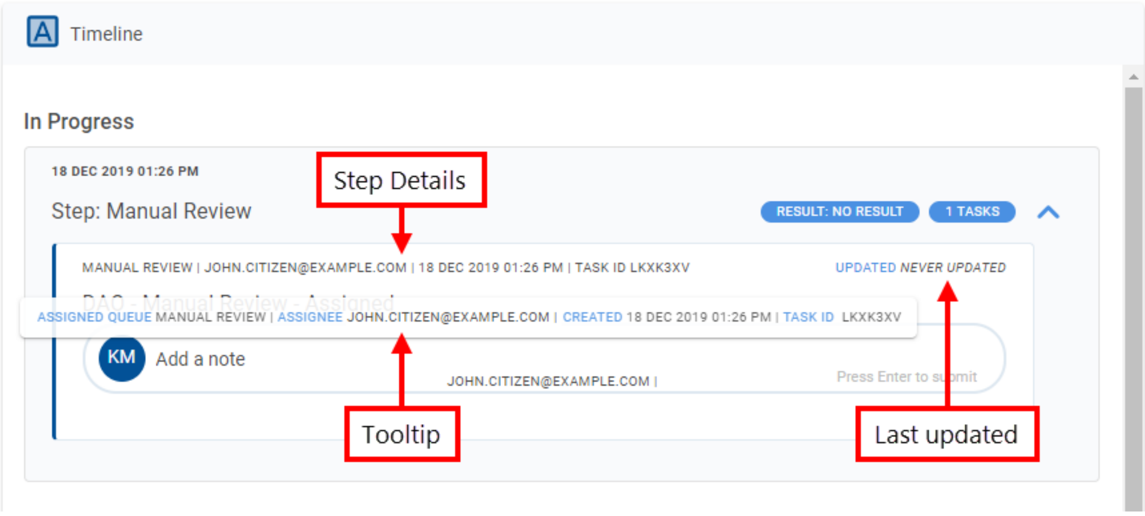
When a step is collapsed, the following details are shown:

- 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:

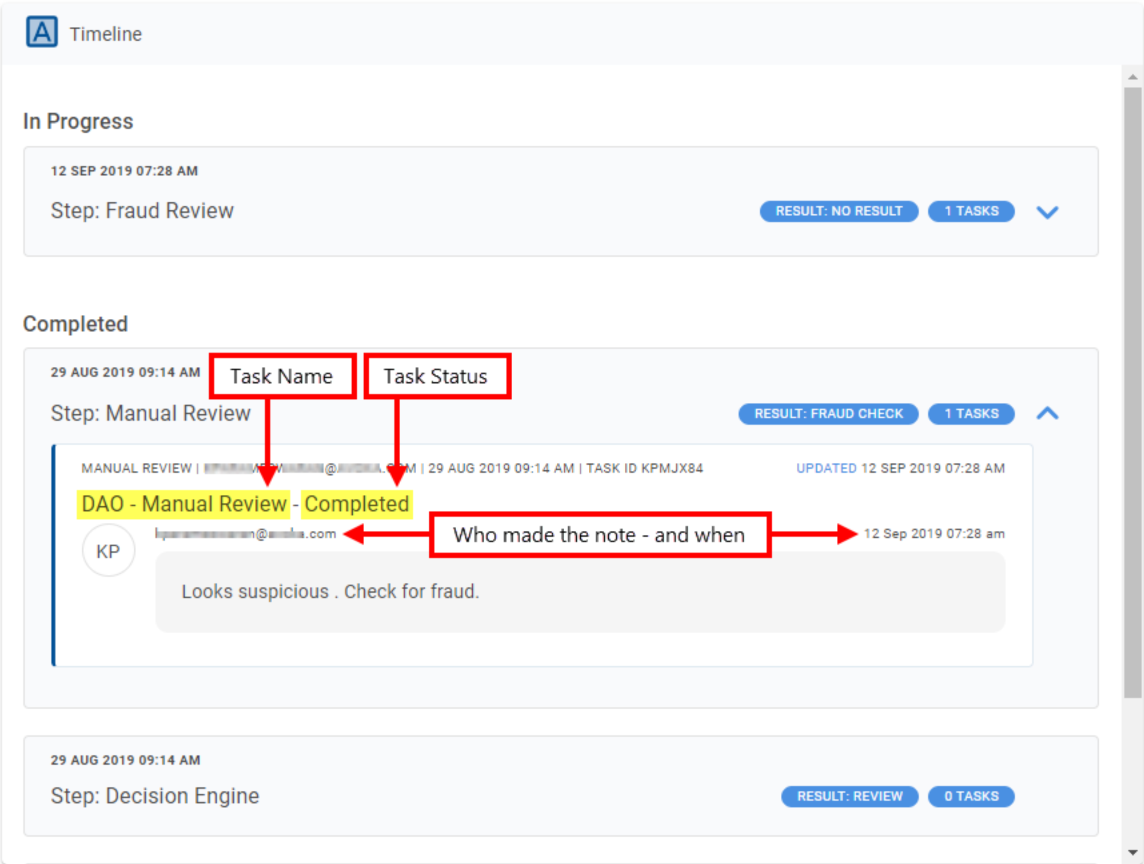
- The name of the queue that the task is or was sourced from.
- Who the task is or was assigned to (email address).
- The date/time that the task was created.
- The date/time that the task was most recently updated.
- The task ID; this is unique in your Workspaces portal.

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.



NOTE

The Note field is limited to 2000 characters.

Documents

The processing of applications often requires that the information entered by applicants be verified 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.

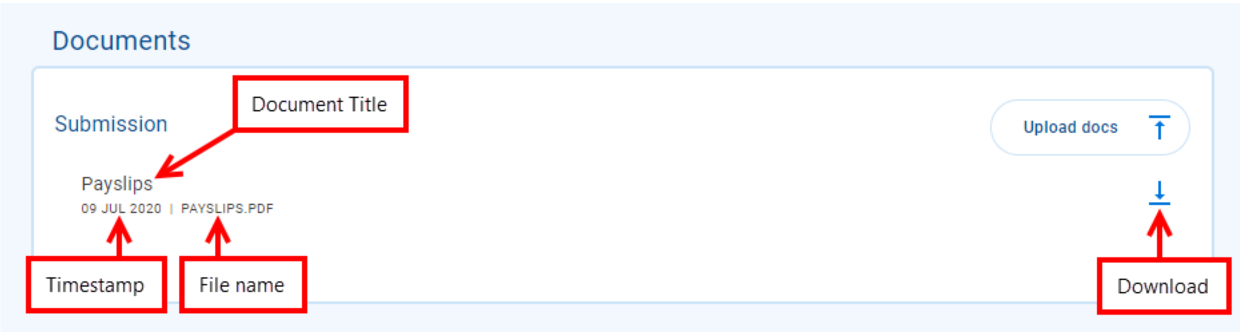
NOTE

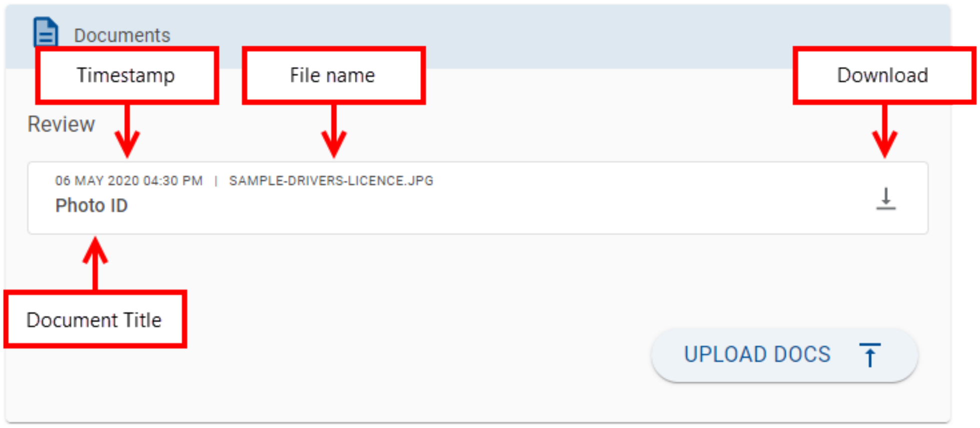
In Workspaces 19.05 and earlier releases, duplicate documents were not permitted. (Workspaces considers two files to be duplicates if they have the same document title (description), the same file name, or if they are copies of the same file with different file names.) Workspaces 19.11 relaxes this constraint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

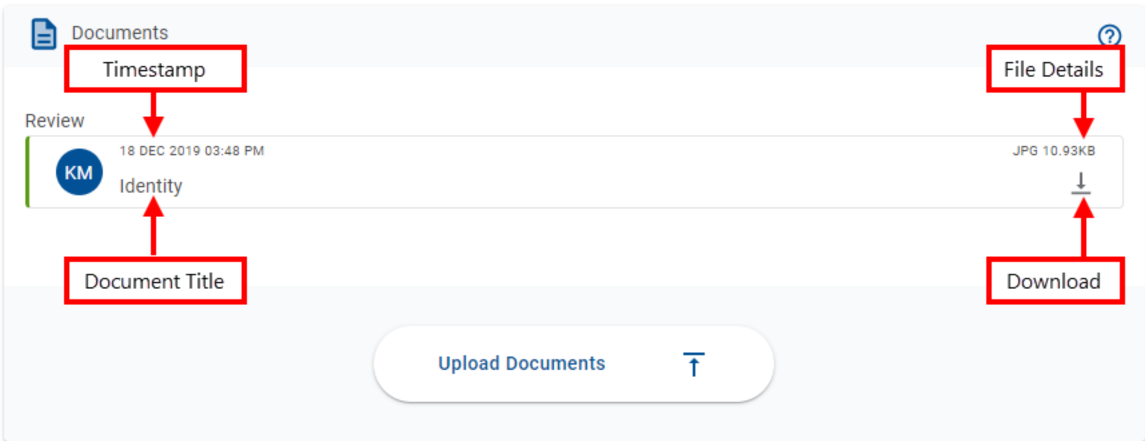
Each item in the Documents card contains the following elements.

- **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 This feature was updated in 19.11.

INFO

As a Workspaces user, you cannot change the way documents appear on the Documents card. However, you can upload and manage the documents attached to an application.

Upload a Document

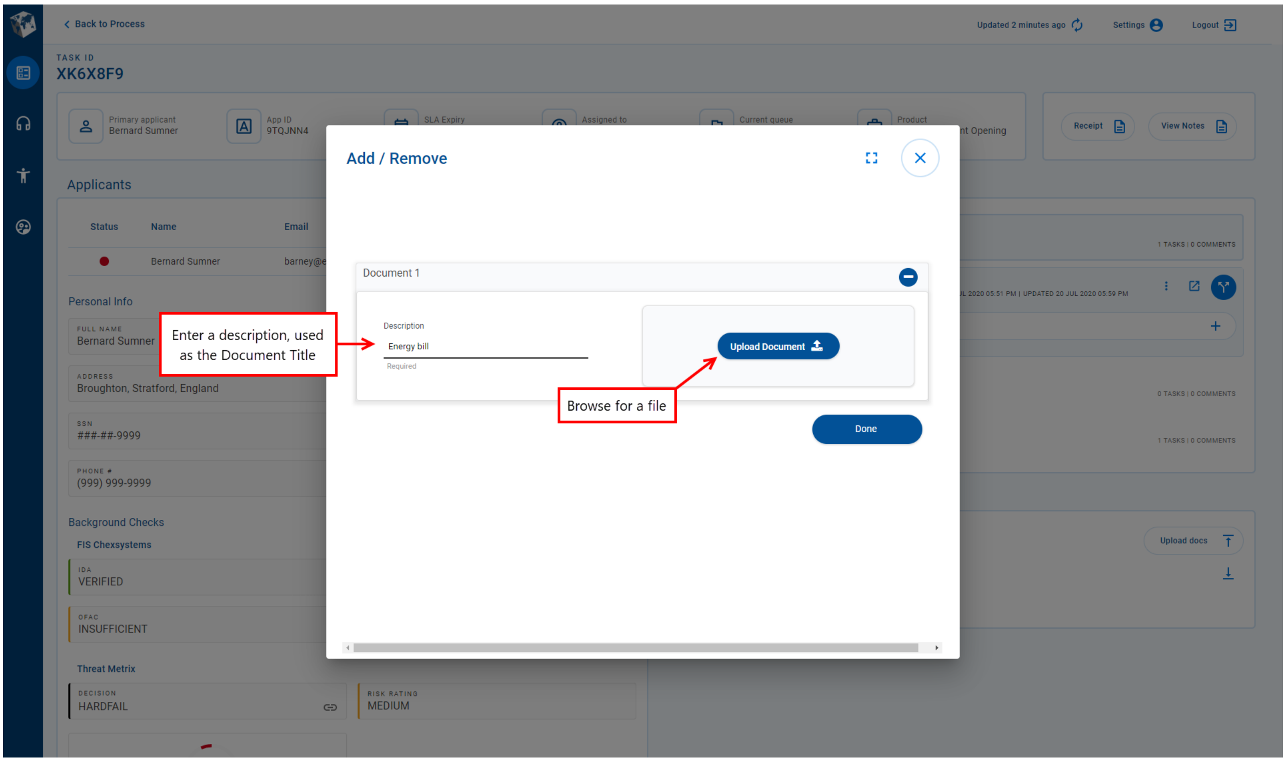
The Upload Docs (Upload Documents in Workspaces 19.05 and earlier) option provides a way for you to attach documents to an application. While you can upload a document in any space, you can only do it from a Details screen, not from a List screen.

In Workspaces 19.05 and earlier releases, you can only upload documents for tasks that are assigned to you. Workspaces 19.11 relaxed this constraint in the default configuration, allowing Workspaces to be configured so that anyone can upload a document to any application, regardless of who it is assigned to.

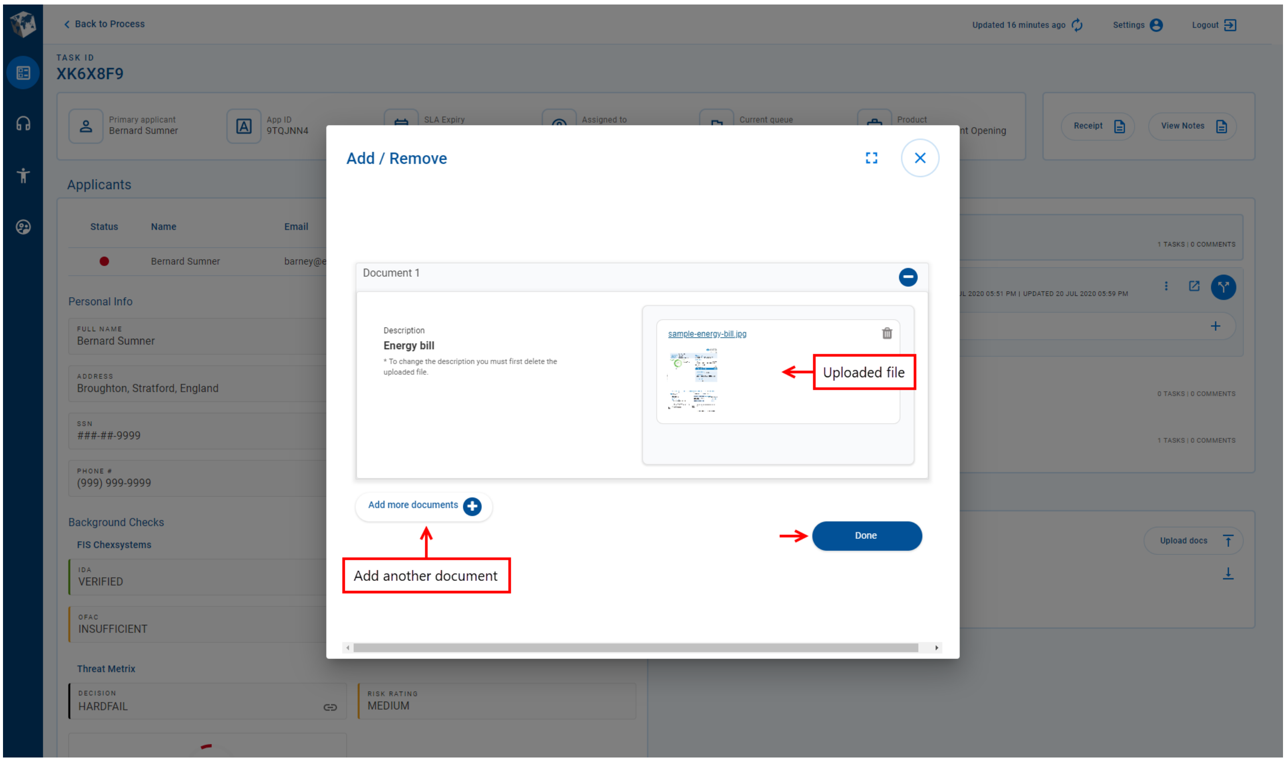
> INFO 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE
>
> By default, the option to upload a document is usually available. However, Workspaces can be configured with conditional rules, based on task or application data values, that control whether the document upload option is available.

To upload a document on the Details screen:

1. Click Upload Docs (Upload Documents in Workspaces 19.05 and earlier).
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.



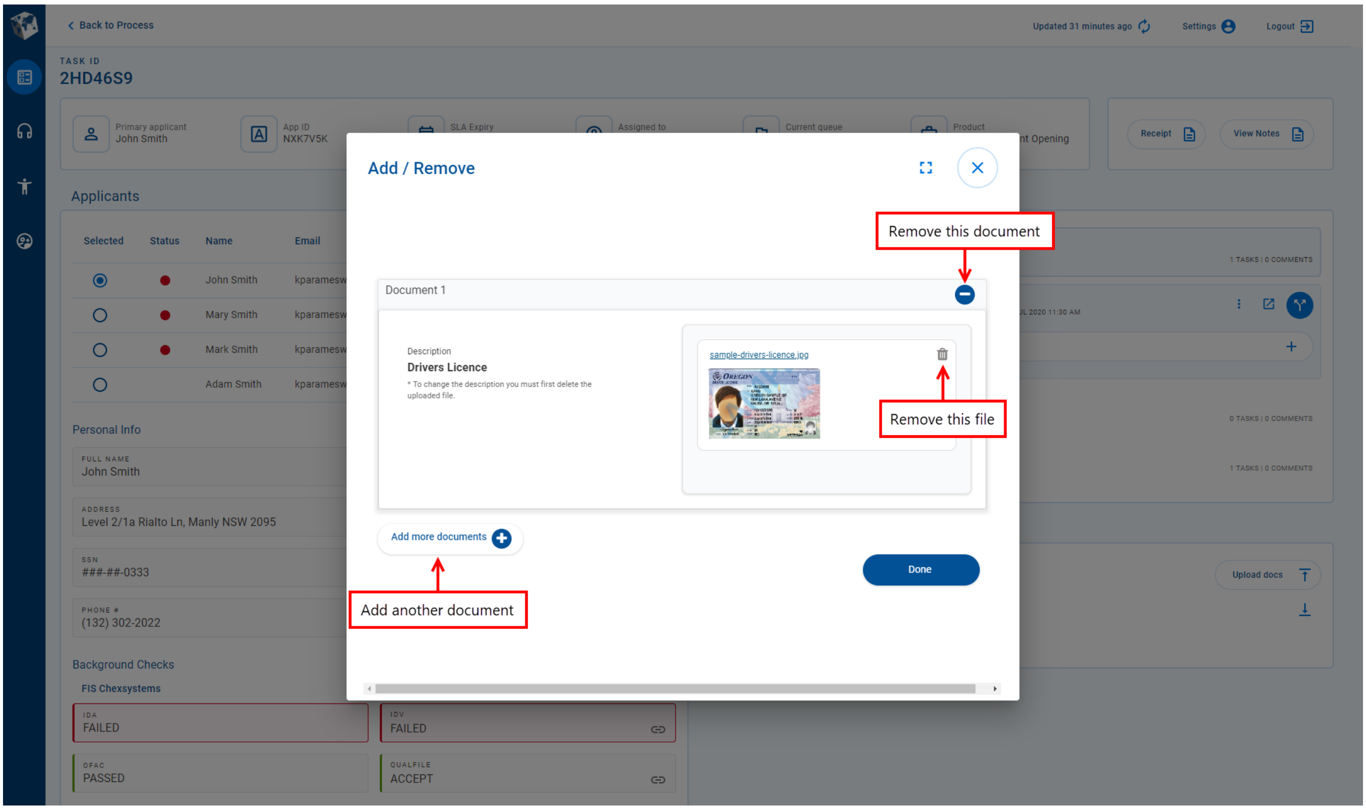
4. If you're finished uploading documents, then go to the next step. However, If you want to upload more documents, click Add more documents and repeat from step 2 above.
5. Click Done or (Close) when you're finished uploading documents.

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.

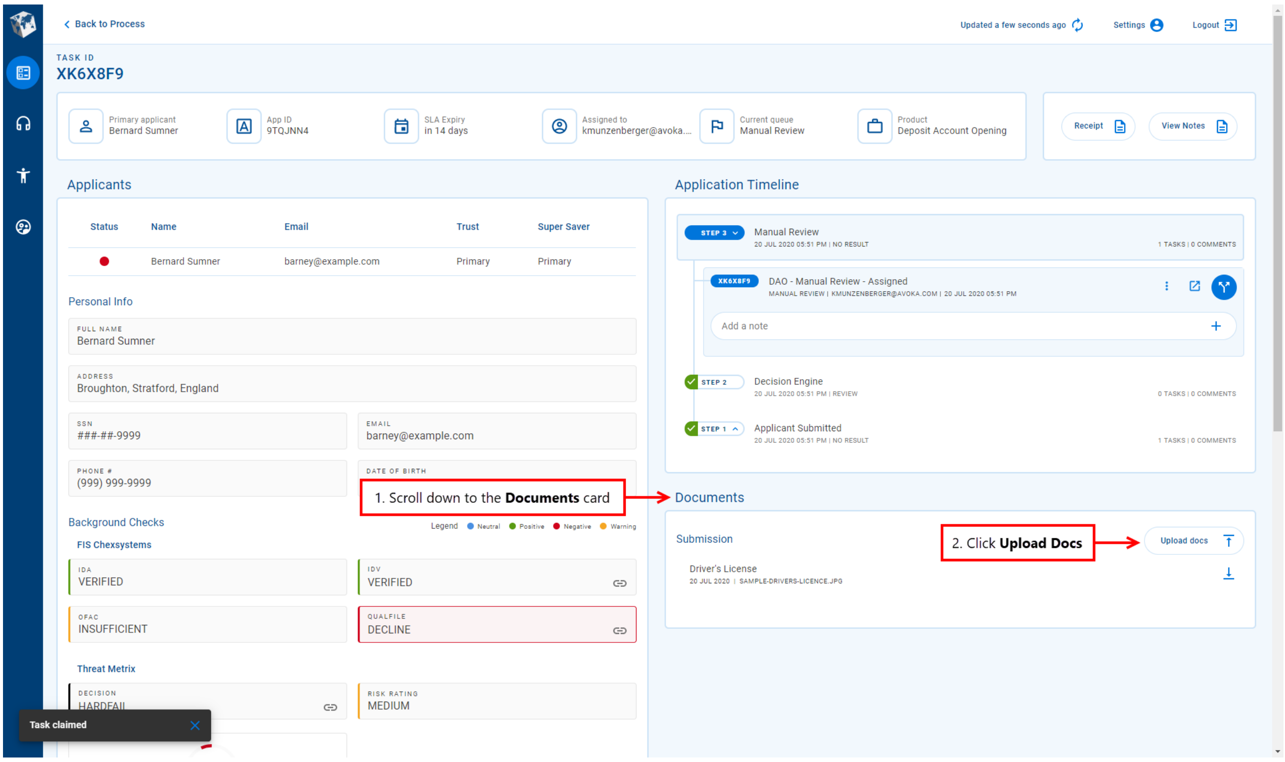
The following image shows where you can find the various attachment management features.



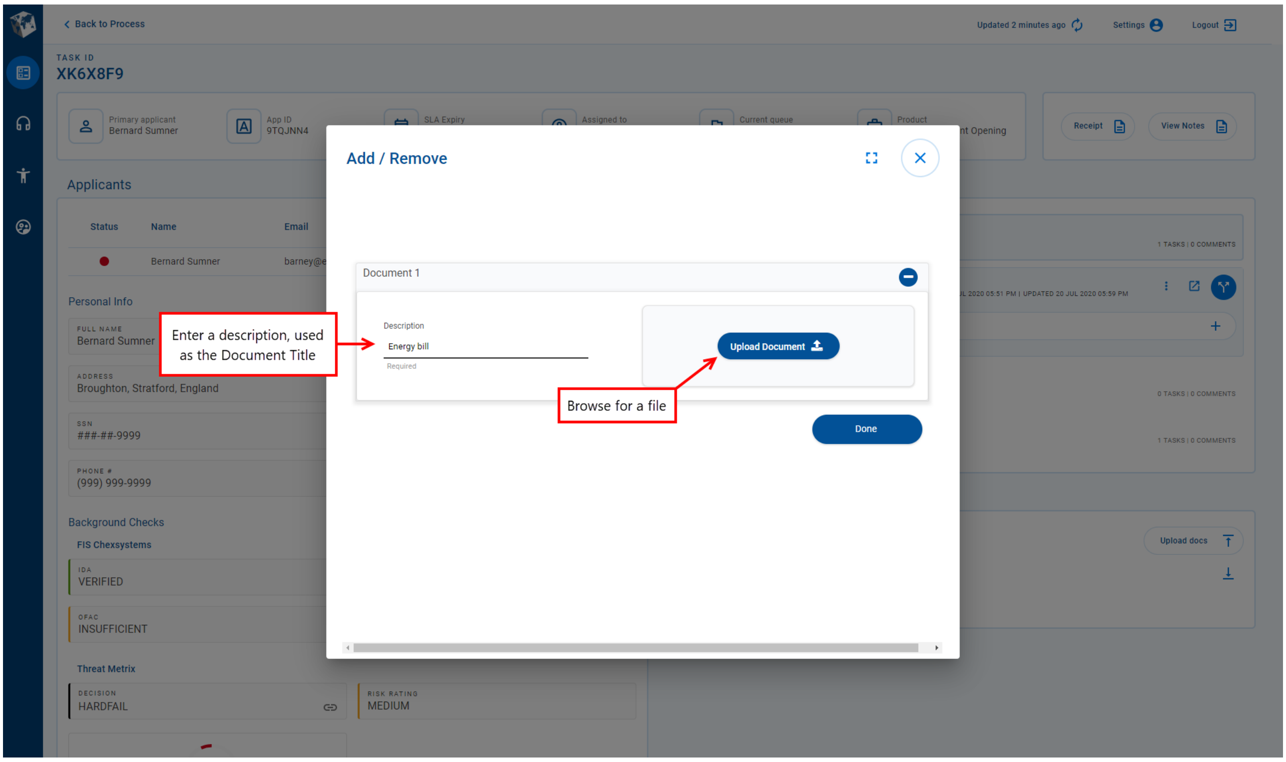
Upload a Document Example

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 Task Review 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.

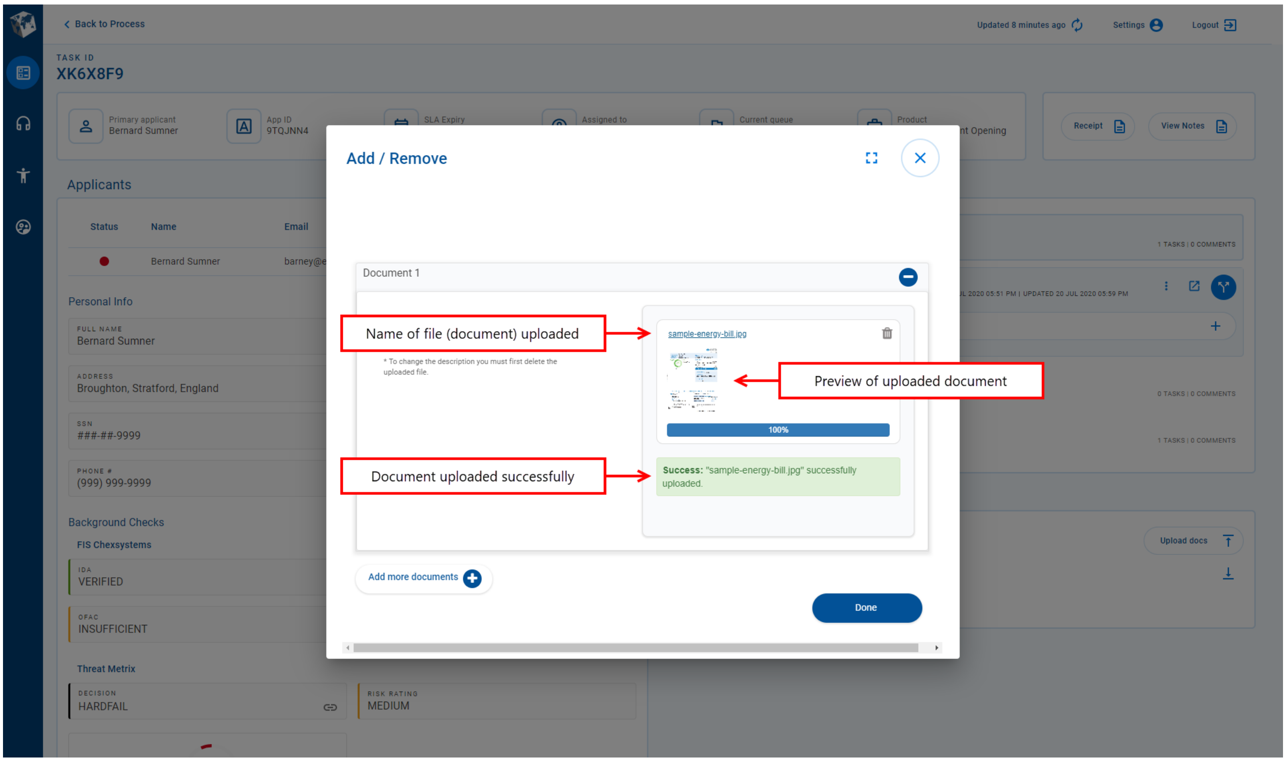


4. Enter a description for the document that you want to upload. Note that the Upload Document button on the right is disabled until you enter something in the description field.

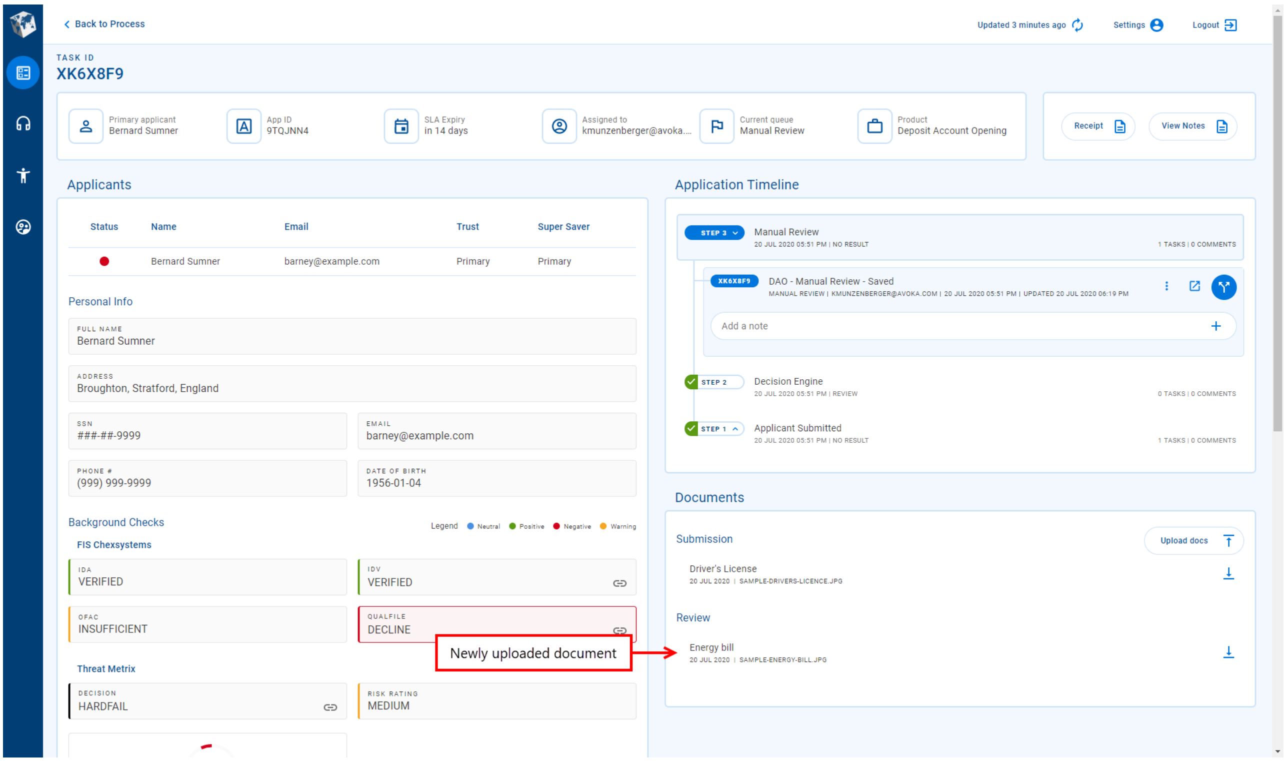


5. Click Upload Document, then browse to and select the document file you want to upload. A message is displayed briefly confirming that the document has been uploaded

successfully.



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



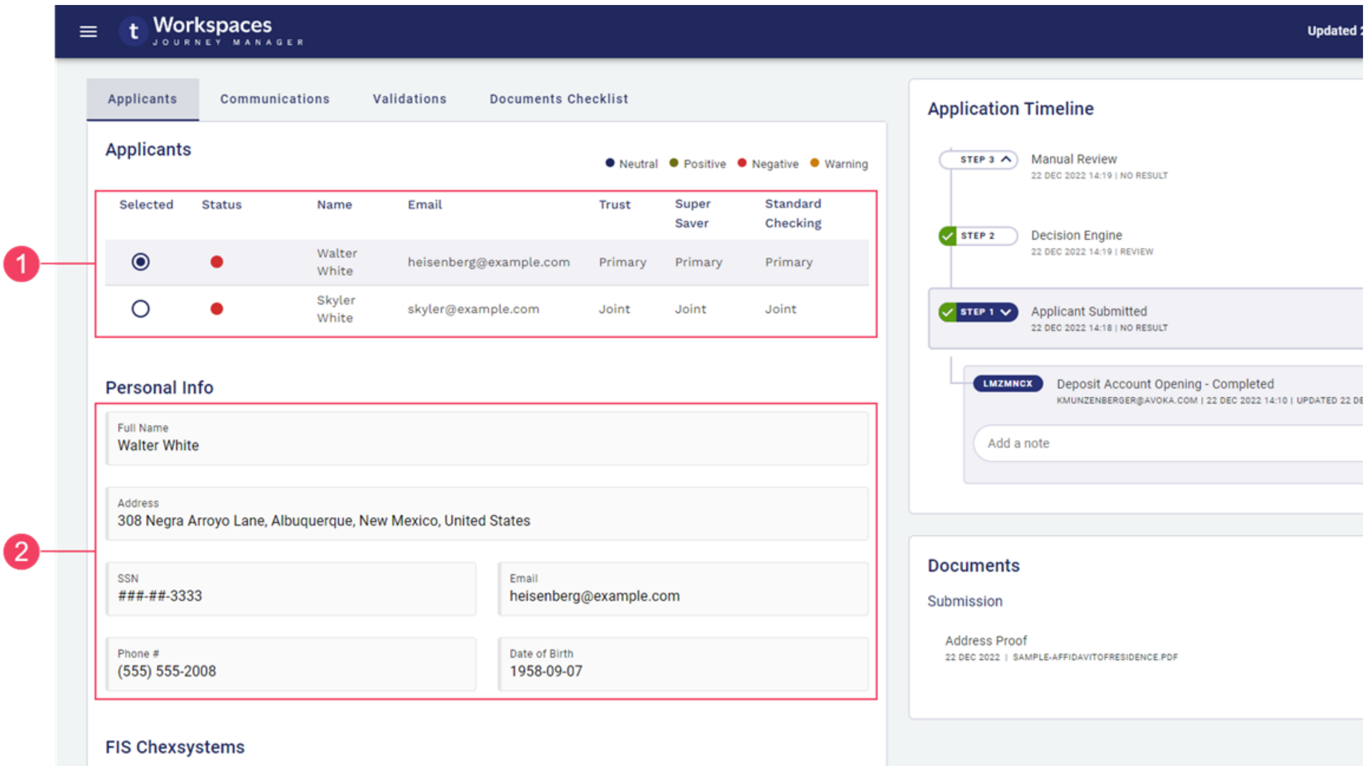
A new document item appears in the Documents card for the document you just uploaded.

Custom Information

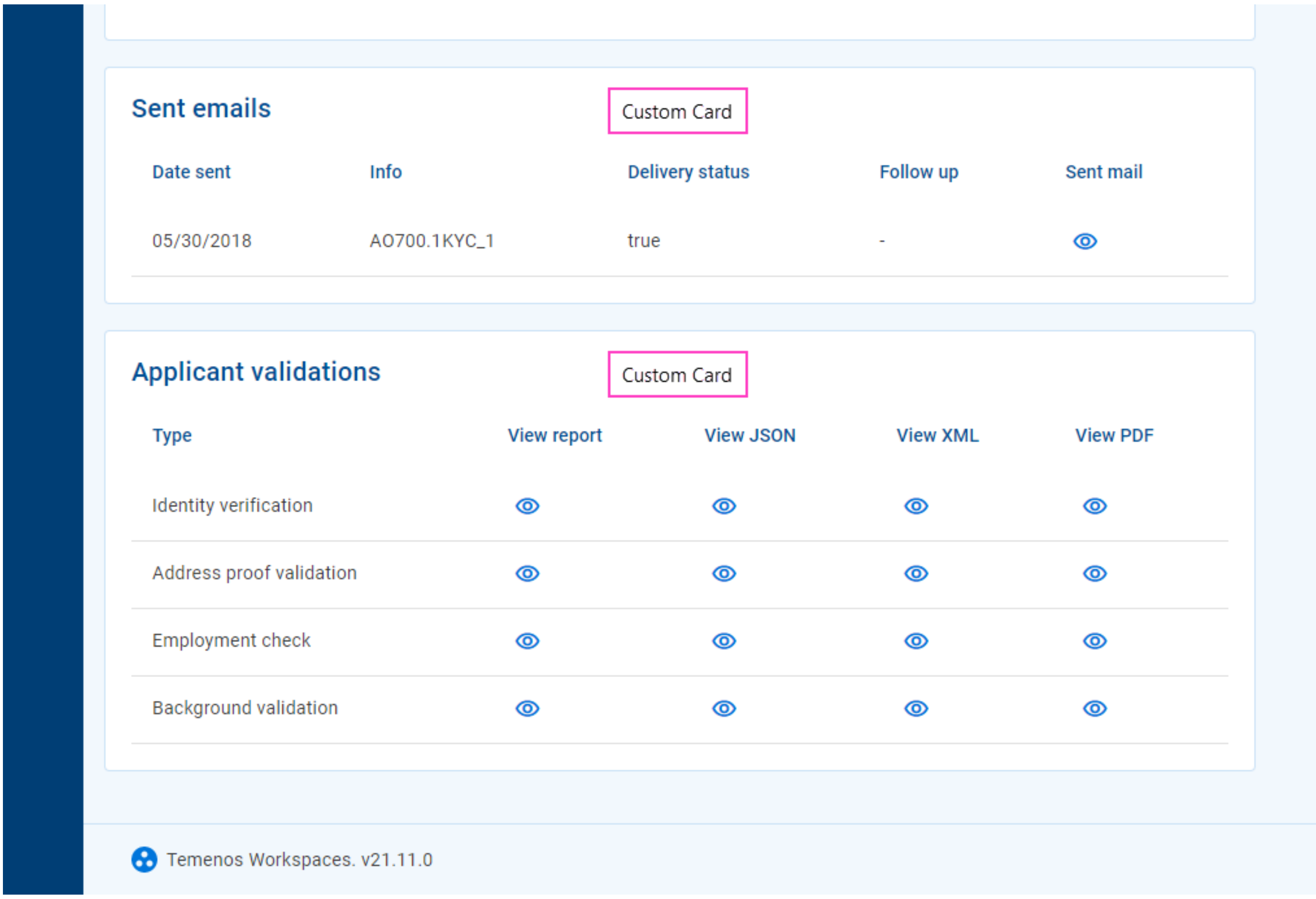
In addition to the standard information types described above, other information can be displayed in separate tabs (22.10This feature was introduced in the 22.10 release) using custom formats. Two formats are supported:

- **Multi-value:** Data is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different data item (identified by the column header), and each row is a set of related values. Each value is either a simple text/number display, or an icon that links to additional details or functionality. All values in the same column are of the same type.
- **Single-value:** Each data item in a tab, card or section is displayed separately, with a label, a value, and an optional icon that links to additional details or functionality. The personal information section uses this format.

- 22.10
- Prior to 22.10



1. Multi-value data
2. Single-value data



Several icon types are supported in custom information:

- **link (Detail Link):** Indicates additional details are available to view. Click the icon to display the additional details in a pop-up window.
- **vertical_align_bottom (Download):** Indicates the additional details are available to download. Click the icon to download the file containing the additional details. 21.11This feature was introduced in the 21.11 release
- Any other icon provides access to additional functionality. Click the icon to perform the associated action. 22.10This feature was introduced in the 22.10 release

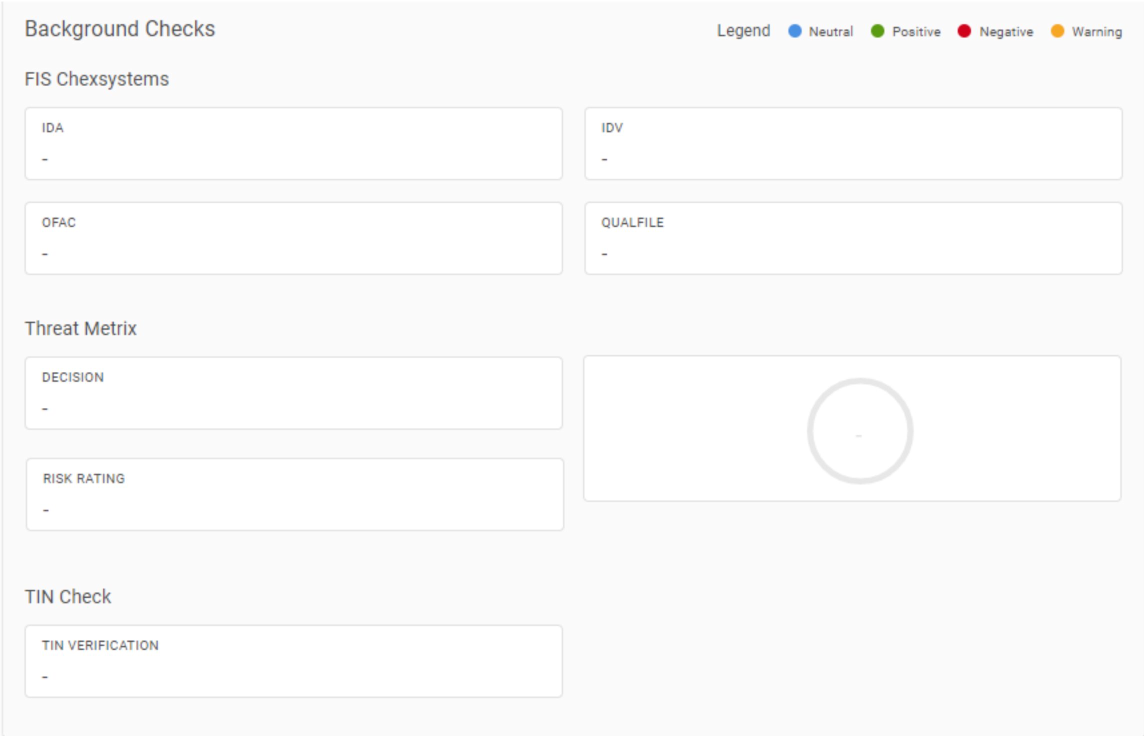
INFO

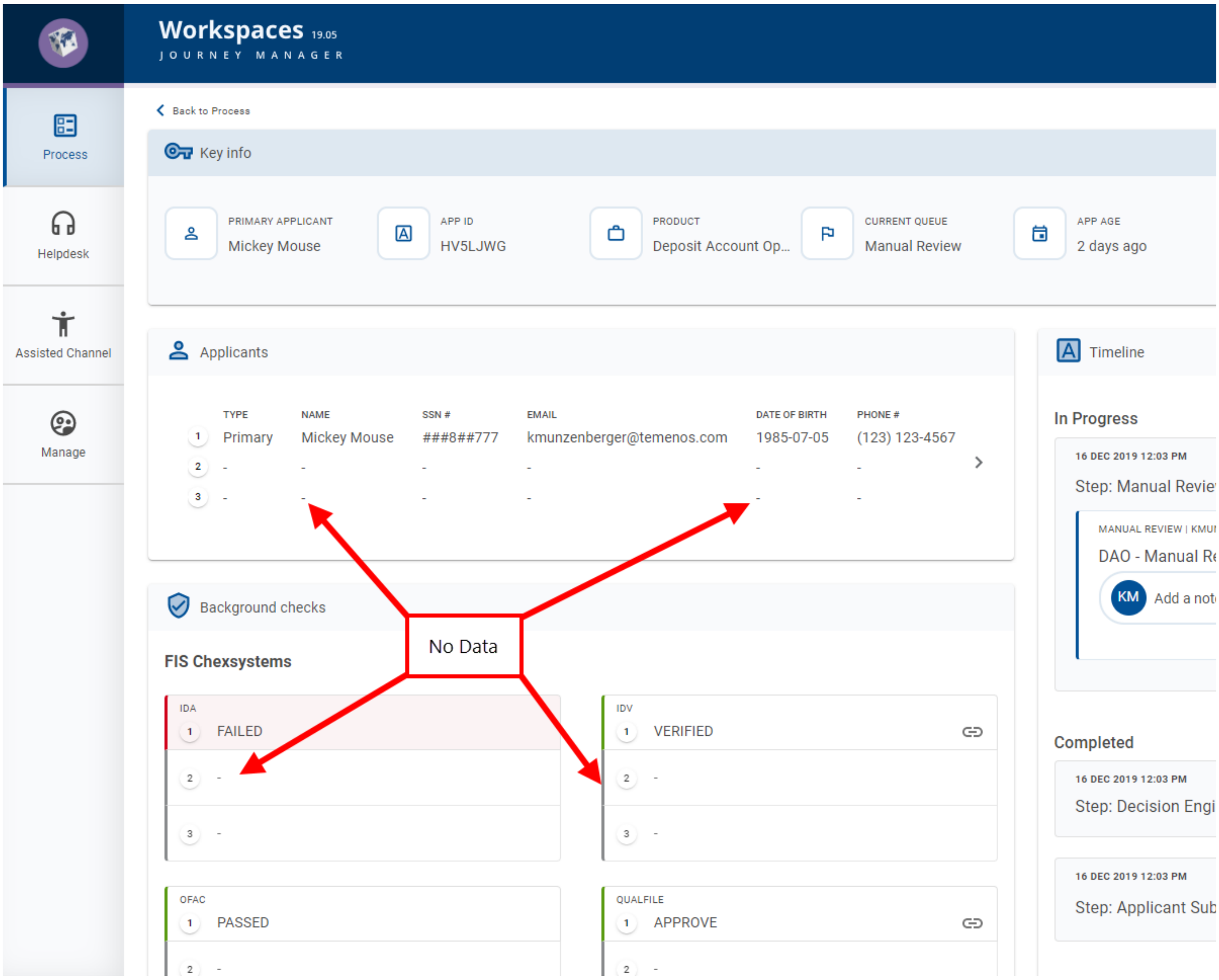
Custom information presents a read-only view of a predetermined data set. It is configured by a Workspaces developer who defines both the data that is displayed and how it appears. A Workspaces user has no control over the way the data appears, nor can they modify the displayed information.

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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described 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 Applicants 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.
- **Reassign**: Assign an assigned task to another user. 22.10This feature was introduced in the 22.10 release
- **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 sub-

mitted.

- **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 Task Review 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, Reassign, and Unassign actions, see Manage Actions.
- To learn more about working with tasks in the Applicants space, see Applicants space Actions.

Standard actions

Standard actions expose 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.

- Task Review: Claim, Decision, Receipt, Release, View Notes
- Document Requests: Receipt, View Notes | 22.10 This feature was introduced in 22.10.
- Helpdesk: Receipt, Recover, View Form, View Notes, Withdraw
- Assisted Channel: Receipt, Recover, View Form, View Notes, Withdraw
- Manage: Assign, New Form, Reassign, 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.

- Applicants: New Form, Receipt, Recover, Resume, Withdraw

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

Action availability

Associating an action with a space is just one way that Workspaces controls the actions that are available to you at any point in time. Other factors that contribute to whether an action is available include:

- Role-based configuration of permissions.
- The current status of a task or application.
- Conditional rules based on other task or application data values. 22.10This feature was introduced in the 22.10 release

All of these factors work together with space-based access control to determine whether an action is available for a task or application as the application progresses through its life cycle. For more information about how spaces are used to control what actions you can perform, see Access control.

Performing standard actions

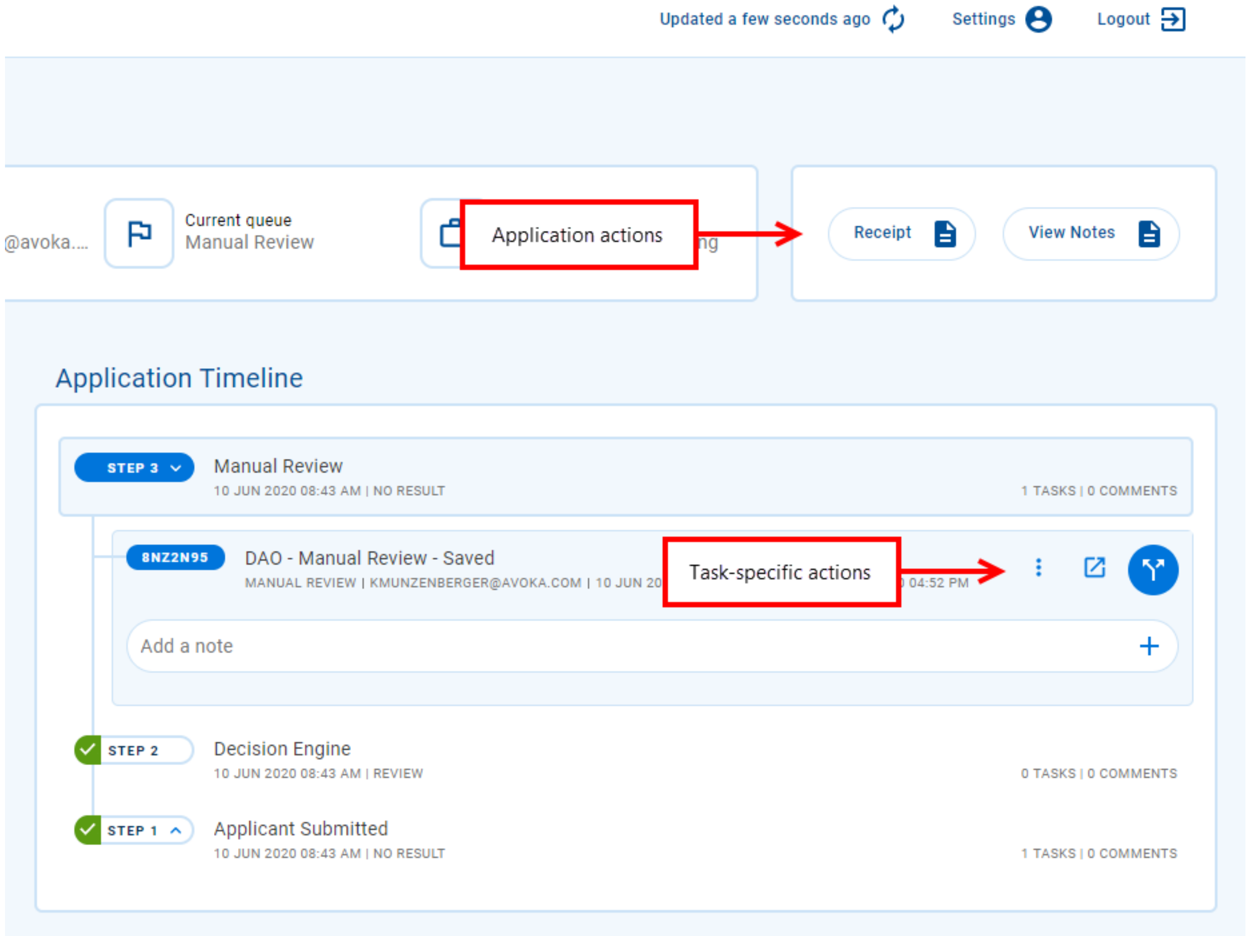
Standard actions can be performed from any List screen or Details screen. On a List screen, actions are accessed via icon buttons on the right-hand side of each item in the item list.

NOTE

From the List screen, you can also use the Bulk Action feature to perform multiple actions at once. 22.10This feature was introduced in the 22.10 release

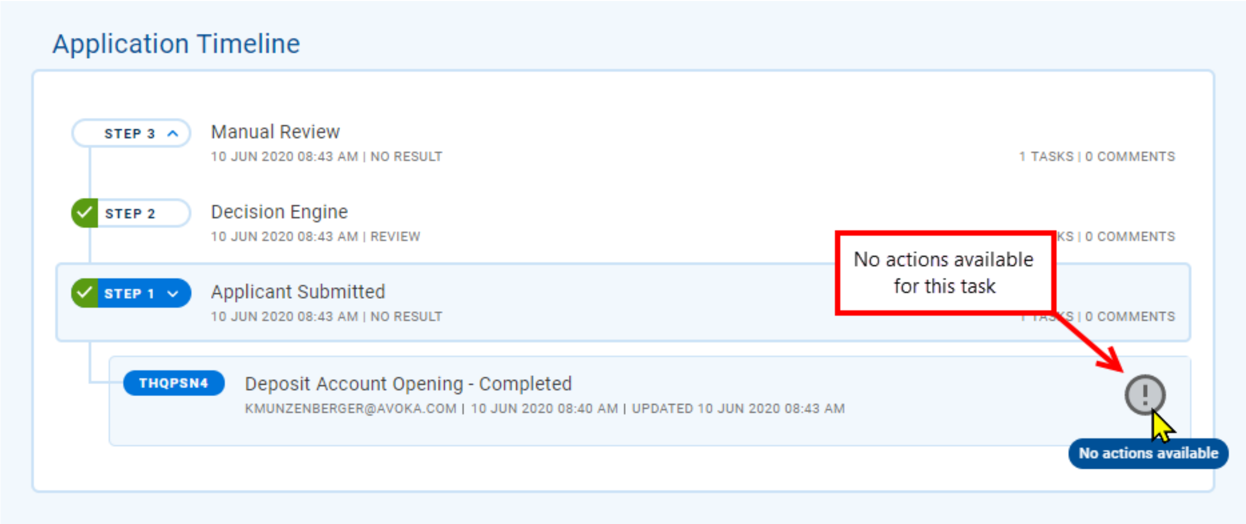
The way actions are made available on a Details screen varies depending upon whether the action relates to an application or a task.

- **Application actions** are accessed via buttons in the Action panel to the right of the Key Info card.
- **Task actions** are accessed via icon buttons on each task in the Timeline.



Different actions may be available for each task. This is 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 Assign action will be available only for tasks that aren't assigned to a user.

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 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 use third-party web services or fluent functions to extend the functionality of your Workspaces portal with features that are not available in the default configuration. Custom actions can be performed from a Details screen only.

NOTE

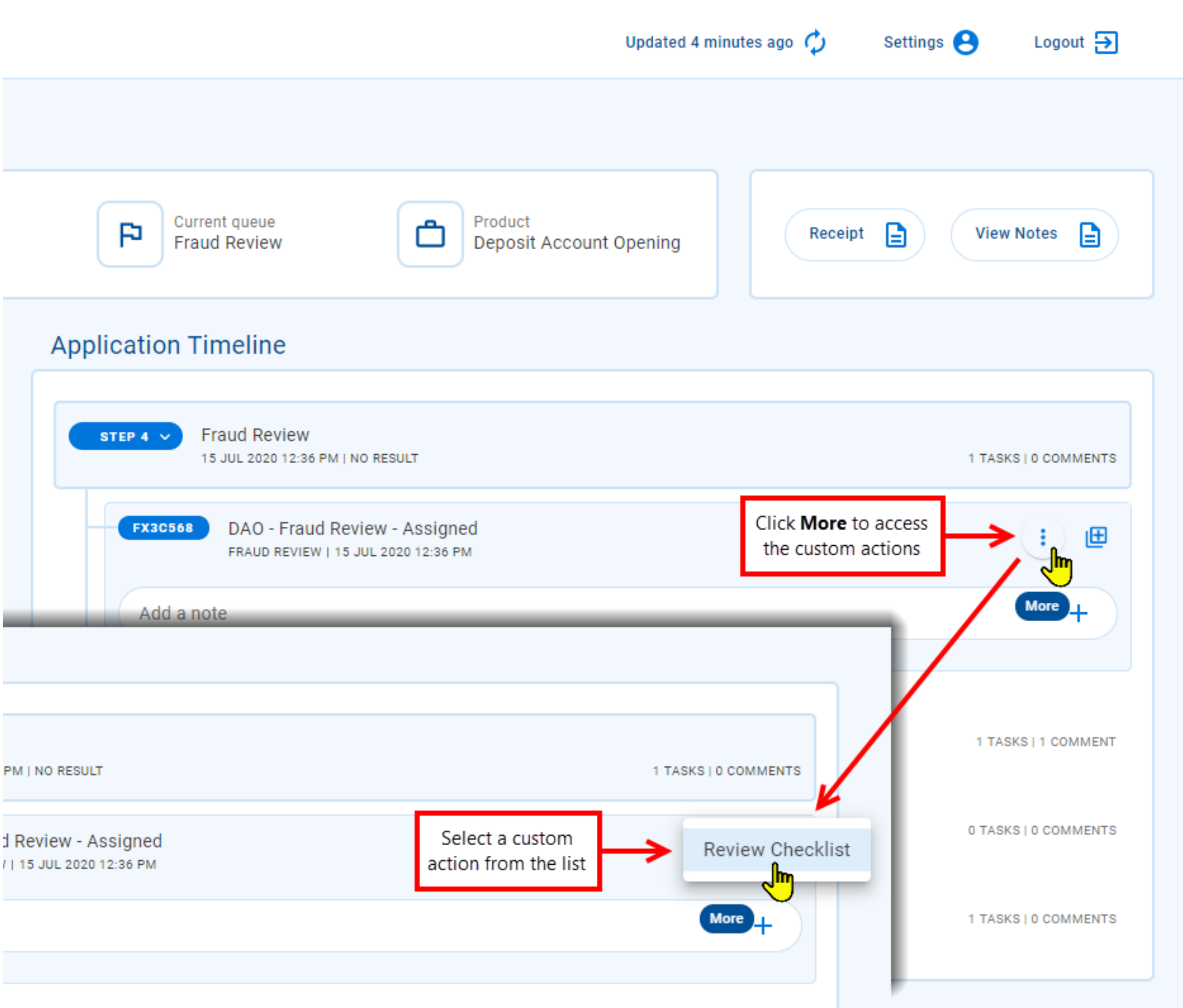
There are no custom actions in the default Workspaces configuration. Any available custom actions, and what they do, are specific to your Workspaces portal and are not covered by this documentation.

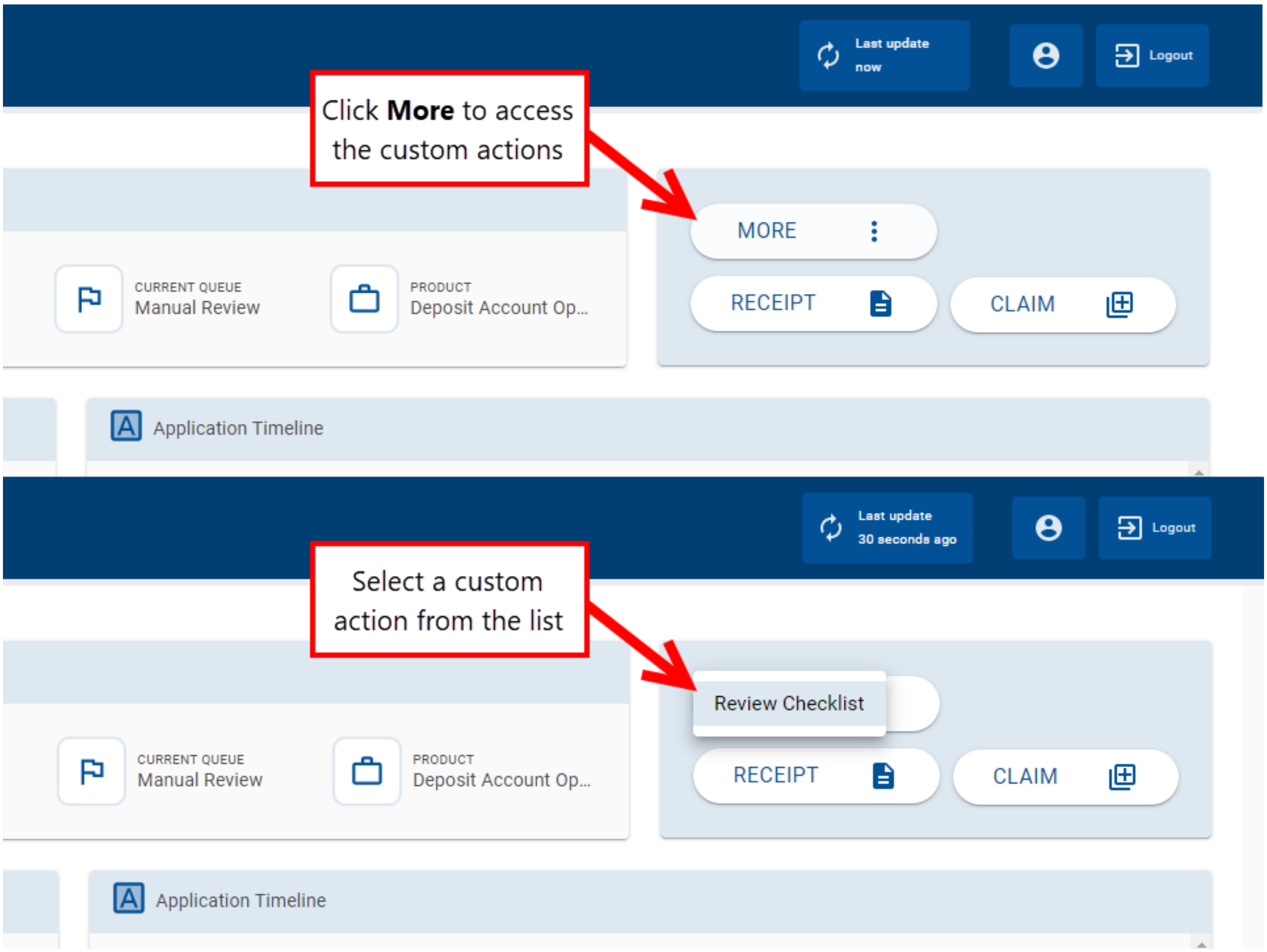
To perform a custom action:

1. On a List screen, select a task or application item to display it in the corresponding Details screen.
2. Click More to display the list of available custom actions.
   - **20.05 and later:** The More button is specific to each task in the Application Timeline.
   - **Prior to 20.05:** The More button is located in the action group to the right of the Key Info card.
3. Select the desired action from the list of custom actions.

Workspaces triggers the custom functionality in Journey Manager or another back-end system. What happens next depends on the configuration of the custom action, and user interaction may be required. Once the custom behavior is complete, Workspaces refreshes the screen.

- [20.05 and later]()
- [Prior to 20.05]()





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 screen where the user initiated the custom action.

Bulk Actions in Workspaces

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 22.10This topic was introduced with the 22.10 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Workspaces portal.

Workspaces provides a set of standard actions for working with applications and tasks. By default, all actions act on a single application or task. Sometimes, however, you may want to perform the same action on several tasks. The Bulk Action feature provides a convenient and efficient way to perform an action on multiple tasks all at once, rather than having to select each task item one at a time and performing the action. Bulk actions are particularly efficient when an action requires the entry or selection of additional data to complete it, such as selecting a user from a list.

The Bulk Action feature is available on the List screen only. To perform a bulk action, you first need to activate the Bulk Action mode. Activating this mode displays the Bulk Action panel which contains an Action selector and an Apply button. The Bulk Action mode is deactivated when you apply the Bulk Action action or via the Bulk Action mode selector. Deactivating the Bulk Action mode hides the Bulk Action panel.

To perform a bulk action, first ensure the Bulk Action mode is active, then select an action to perform from the Action selector. If the selected action requires a target user, the User selector is displayed. Select one or more tasks from the item list and, if required, a target user from the User selector. The order in which you make these selections is not important. Finally, once all selections have been made, apply the selected action to the selected tasks. A notification is displayed indicating the success or failure of the bulk action. A bulk action fails if the action fails for any of the selected tasks.

INFO

A Workspaces administrator can refer to the Journey Manager logs for more details about why a bulk action failed.

When you activate the Bulk Action mode, all of the items in the item list are disabled. Deactivating the Bulk Action mode enables all items in the item list again. Once the Bulk Action mode is active, each time you select an action to perform from the Action selector, the items for the tasks that can be targeted by the selected action are enabled with all remaining items disabled. You can use the Paging Tools to navigate amongst item list pages to find the tasks you need. However, when you click Apply, the action is applied to the selected tasks on the current page only. Selected items on other pages are ignored.

The actions that can be performed as bulk actions are:

- **Assign**: Assign a task to a Workspaces user.
- **Claim**: Assign a task to yourself.
- **Reassign**: Assign an assigned task to another user. 22.10This feature was introduced in the 22.10 release
- **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.
- **Withdraw**: Cancel an application that has been saved but not yet submitted.

Each of these actions is described in separate topics. Click an action name in the list above to learn about these actions.

Example

Bulk Reassignment of Tasks

The following example illustrates the steps required to reassign several tasks using the Bulk Action feature.

1. Select the Manage space (1).
2. Activate the Bulk Action mode (2). The Bulk Action panel appears (3), and all items in the item list are disabled.
3. Select the action to perform from the Action selector; in this case, the Reassign action (4). Items corresponding to assignable tasks are enabled in the item list (5), and the User selector (6) appears beside the Action selector.
4. Select one or more of the enabled tasks (7); the number of tasks selected is displayed in the Bulk Action panel (8). Select a target user to reassign the selected tasks to (9). Note that you can make these selections in any order.
5. Once the tasks and a target user are selected, the Apply button is enabled. Click Apply (10) to perform the selected action on the selected tasks. In this case, the selected tasks are reassigned to the selected user, and their Workspaces id is displayed in the Assigned to column of the selected tasks. (11)
6. A success notification is displayed (12), and the Bulk Action mode is deactivated (13).

Assign a Task to a User

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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. For example, an unassigned task can be assigned to someone.

The Assign action is available in the Manage space, and can be performed on tasks that satisfy the following conditions.

- The task is not assigned to anyone.
- The task is assignable to the target user; that is, the target user has the necessary permissions to access the task.

If these conditions are satisfied, the task can be assigned to the target user.

If the task you want to assign is already assigned to someone, either remove the task assignment first by unassigning or releasing it, or reassign the task instead.

NOTE

- The Assign and Reassign actions are mutually exclusive, meaning that only one of these actions is available at any time.
- By default, the Reassign action is only available in the Manage space.

You can assign a task in the Manage space from either the List screen or the Details screen.

Assign from List Screen

To assign a task from the List screen:

[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.

1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to assign.
3. Point your cursor at the applicationtask 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 to column.

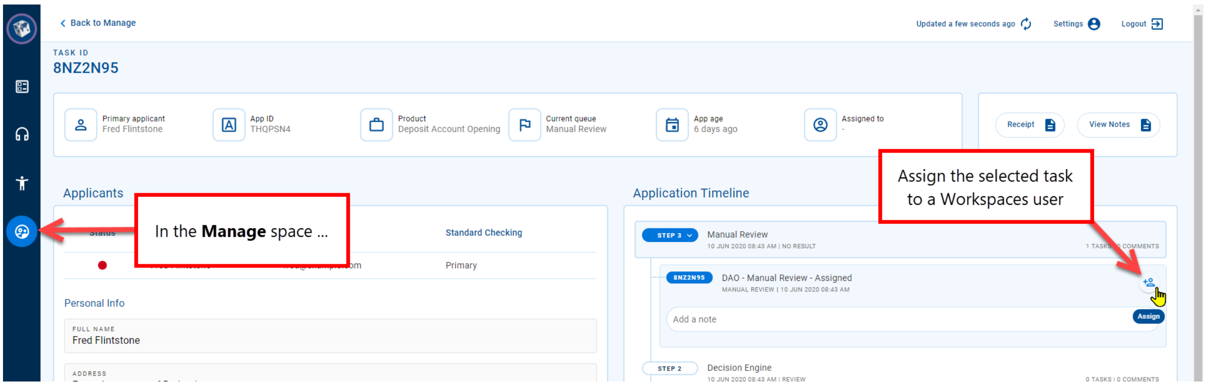
From the List screen, you can also use the [Bulk Action] feature to assign multiple tasks at once.

22.10This feature was introduced in the 22.10 release

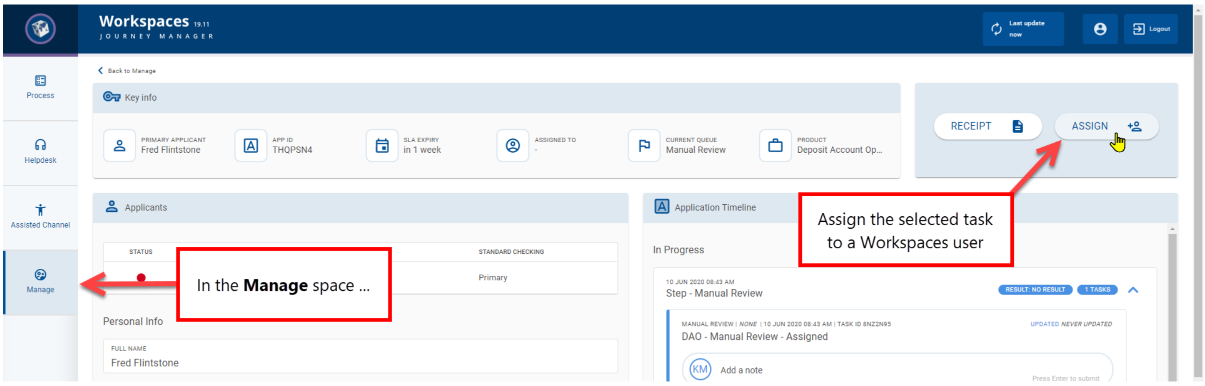
Assign from Details Screen

To assign a task to a user from the Details screen:

1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to assign. Select the task item to display its application details.
3. On the Details screen, click a button to display the list of Workspaces users.
   - **Workspaces 20.05:** Click (Assign) for the selected task in the Application Timeline. The user list displays both the Workspaces user id and the full name for each user.



- **Workspaces 19.11 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.

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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

As an application progresses through its life cycle, Journey Manager creates tasks that users can interact with. A task must be assigned to a user before they can work on it. Workspaces provides the Claim action as a convenient way to assign a task to yourself.

You can't claim a task that is already assigned to someone, so if you want to claim an assigned task, you need to remove the task assignment first. To learn about removing a task assignment, see Unassign - Remove a Task Assignment.

The Claim action can only be used to assign a task to yourself, not to someone else. To learn about assigning tasks to other users, see Assign a Task to a User.

If you have access to the Manage space, an alternative to claiming or assigning a task is to reassign it to yourself or someone else instead. To learn about reassigning tasks, see Reassign an assigned Task to another User. | 22.10 This feature was introduced in 22.10.

> NOTE
>
> - The Claim and Reassign actions are mutually exclusive, meaning that only one of these actions is available at any time.
> - By default, the Reassign action is only available in the Manage space.

You can claim a task in the Task Review or Helpdesk space from either the List screen or the Details screen.

Claim from List Screen

To claim a task from a List screen:

1. Select the Task Review or Helpdesk space.
2. On the List screen, locate the item in the item list for the task you want to claim.
3. Point your cursor at the task item. The available actions appear at the right-hand side.

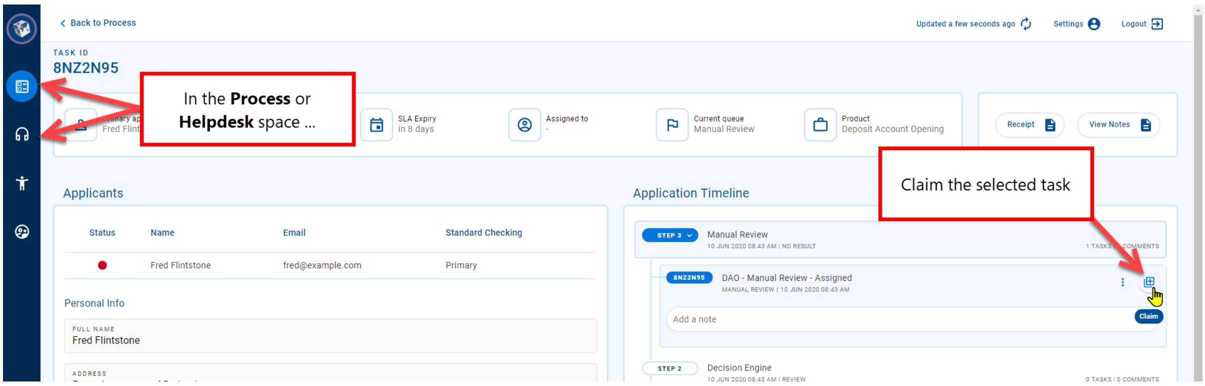
4. Click (Claim). The task is assigned to you, and your Workspaces id is displayed in the Assigned column.

From the List screen, you can also use the [Bulk Action]() feature to claim multiple tasks at once. 22.10This feature was introduced in the 22.10 release

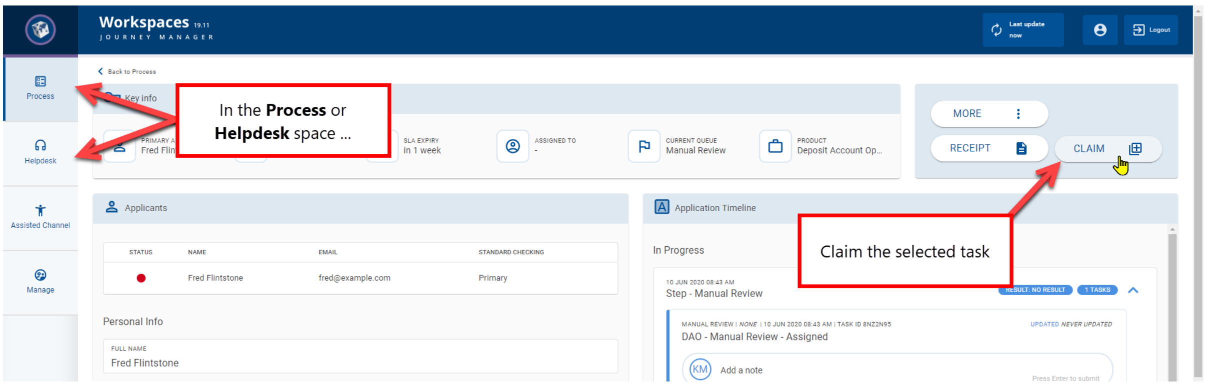
Claim from List Screen

To claim a task from a Details screen:

1. Select the Task Review or Helpdesk space.
2. On the List screen, locate the item in the item list for the task you want to claim. Select the task item to display its application details.
3. On the Details screen, click a button to claim the task using one of the following methods.
   - **Workspaces 20.05:** Click (Claim) for the selected task in the Application Timeline.



   - **Workspaces 19.11 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

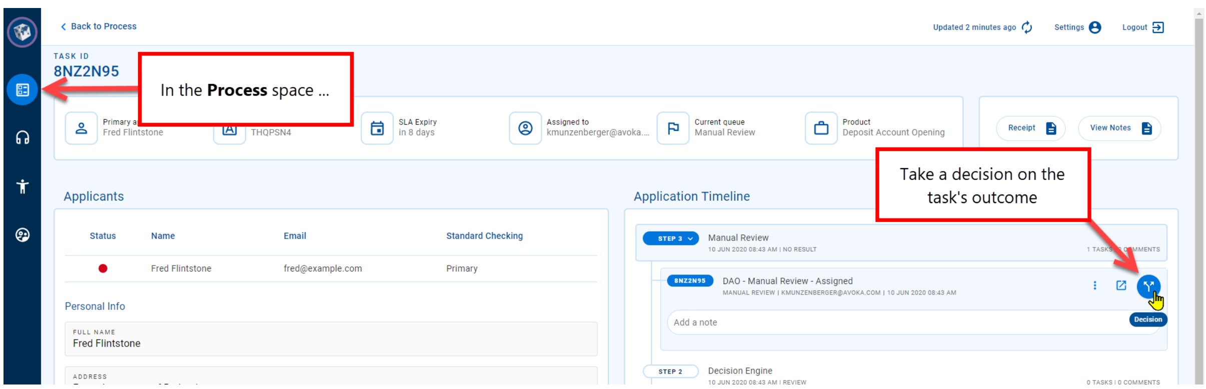
WorkspacesThis topic relates to Journey Workspaces | WorkspacesUserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 20.05This topic was updated for the 20.05 release

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.

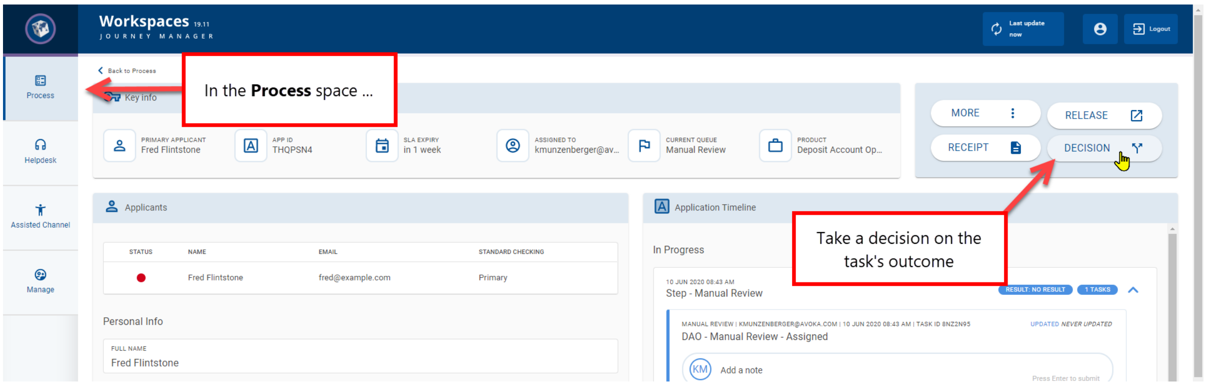
The Decision action is available only from the Details screen in the Task Review space, and only for tasks that are assigned to you; you cannot take a decision for a task that is assigned to someone else. When you take a decision, you must provide both the decision (representing some outcome, assessment 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 prefilled with relevant information.

To take a decision on a task's outcome:

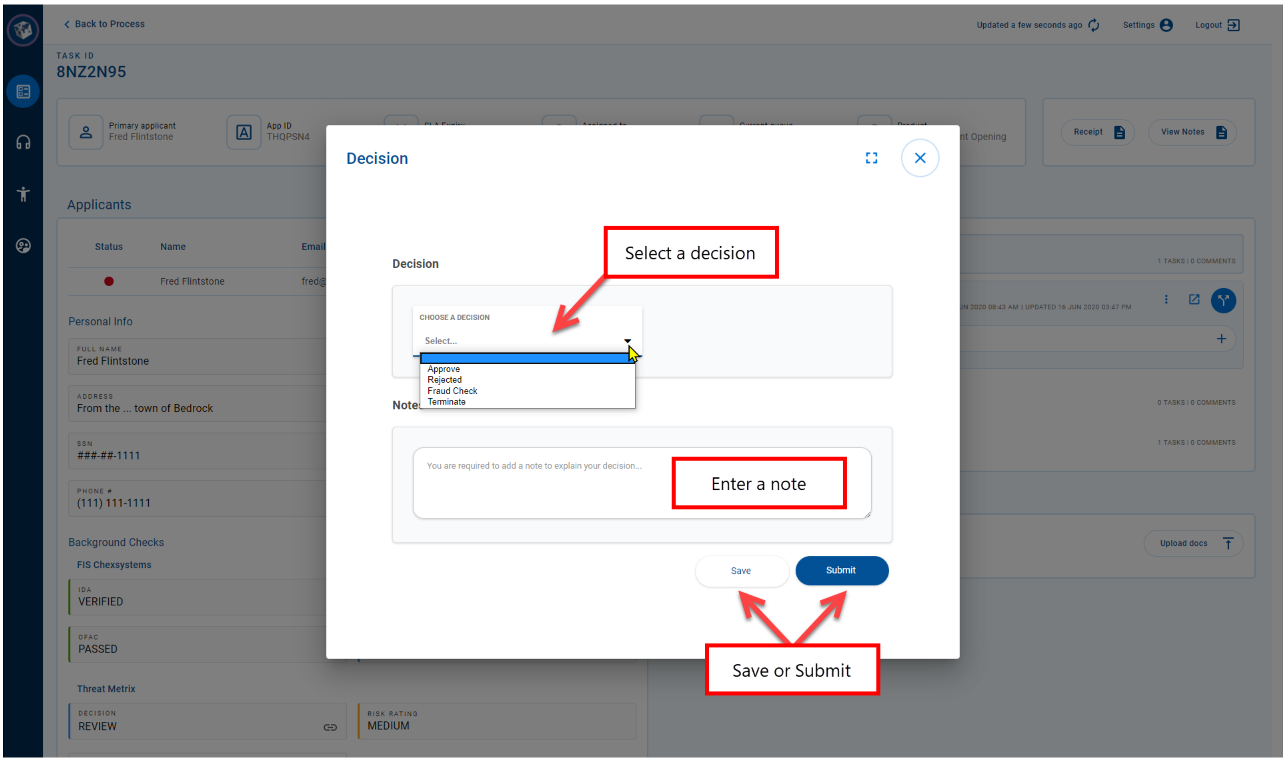
1. Select the Task Review space.
2. Locate the item (task) of interest, and select it to open its Details screen.
3. Click a Decision button to display the Decision window.
    - **Workspaces 20.05:** Click (Decision) for the selected task in the Application Timeline.



- **Workspaces 19.11 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 screen.

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

WorkspacesThis topic relates to Journey Workspaces | Workspaces ApplicantA Workspaces Applicants space user | 21.11This topic was introduced with the 21.11 release

A key feature of the Applicants 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.

NOTE

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 Applicants space) or a Temenos Journey Manager 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 Temenos Journey Manager solution. So, if application handover is important to you, contact your Temenos Journey Manager representative to discuss how your solution can be customized to allow application handover where you need it in your application workflow.

In the Applicants 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 Applicants space:

1. Select the Applicants 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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 19.11This topic was updated for the 19.11 release

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.

NOTE

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 Applicants space) or a Temenos Journey Manager 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 Temenos Journey Manager solution. So, if application handover is important to you, contact your Temenos Journey Manager 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 screen in the Assisted Channel space; the New Form action is not available from the Details screen, nor in any other space.

To start an application:

1. Select the Assisted Channel space.
2. On the List screen, 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 screen, 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.

Reassign - Assign a Task to another User

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 22.10This topic was introduced with the 22.10 release

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. For example, a task that's already assigned to a user can be reassigned to another user.

The Reassign action is available in the Manage space, and can be performed on tasks that satisfy the following conditions.

- The task is assigned to someone other than the target user (the user you want to assign the task to).
- The task is assignable to the target user; that is, the target user has the necessary permissions to access the task.

If these conditions are satisfied, the task can be reassigned to the target user.

While you can't reassign a task that isn't already assigned to someone, you can claim an unassigned task for yourself or assign it to someone else. If you simply want to remove a task's assignee, release or unassign the task instead.

NOTE

- The Assign and Reassign actions are mutually exclusive, meaning that only one of these actions is available at any time. Similarly, the Claim and Reassign actions are also mutually exclusive.
- By default, the Reassign action is only available in the Manage space.

You can reassign a task in the Manage space from either the List screen or the Details screen.

Reassign from List Screen

To reassign a task from the List screen:

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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.

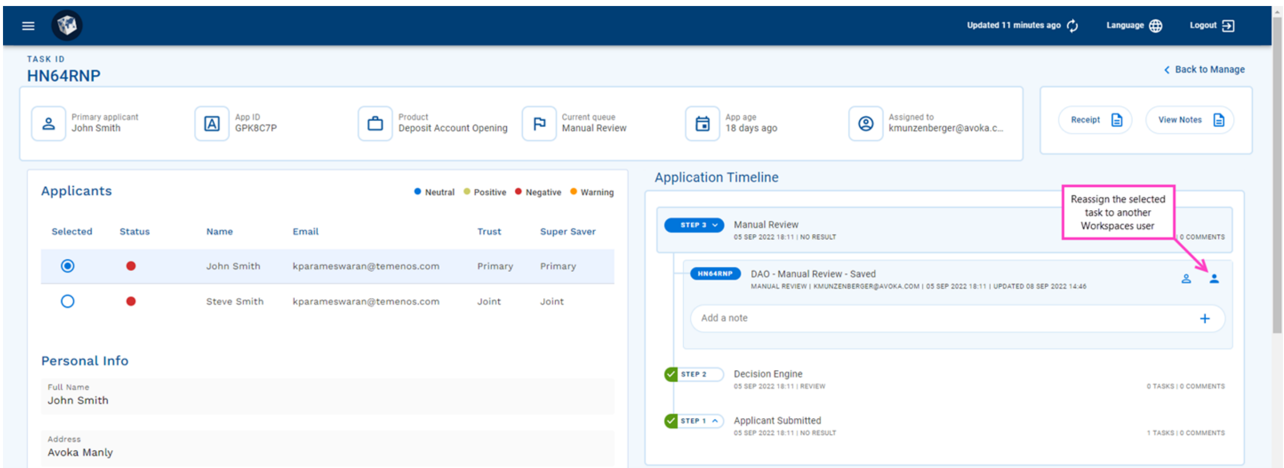
1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to reassign.
3. Point your cursor at the applicationtask item. The available actions appear at the right-hand side.
4. Click (Reassign) to display the list of Workspaces users. The user list displays both the Workspaces user id and the full name for each user.
5. Select a user from the list. The task is assigned to the selected user, and their Workspaces id is displayed in the Assigned to column.

From the List screen, you can also use the [Bulk Action](#) feature to reassign multiple tasks at once.
22.10This feature was introduced in the 22.10 release

Reassign from Details Screen

To reassign a task to a user from the Details screen:

1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to reassign. Select the task item to display its application details.
3. On the Details screen, click (Reassign) for the selected task in the Application Timeline to display the list of Workspaces users. The user list displays both the Workspaces user id and the full name for each user.



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.

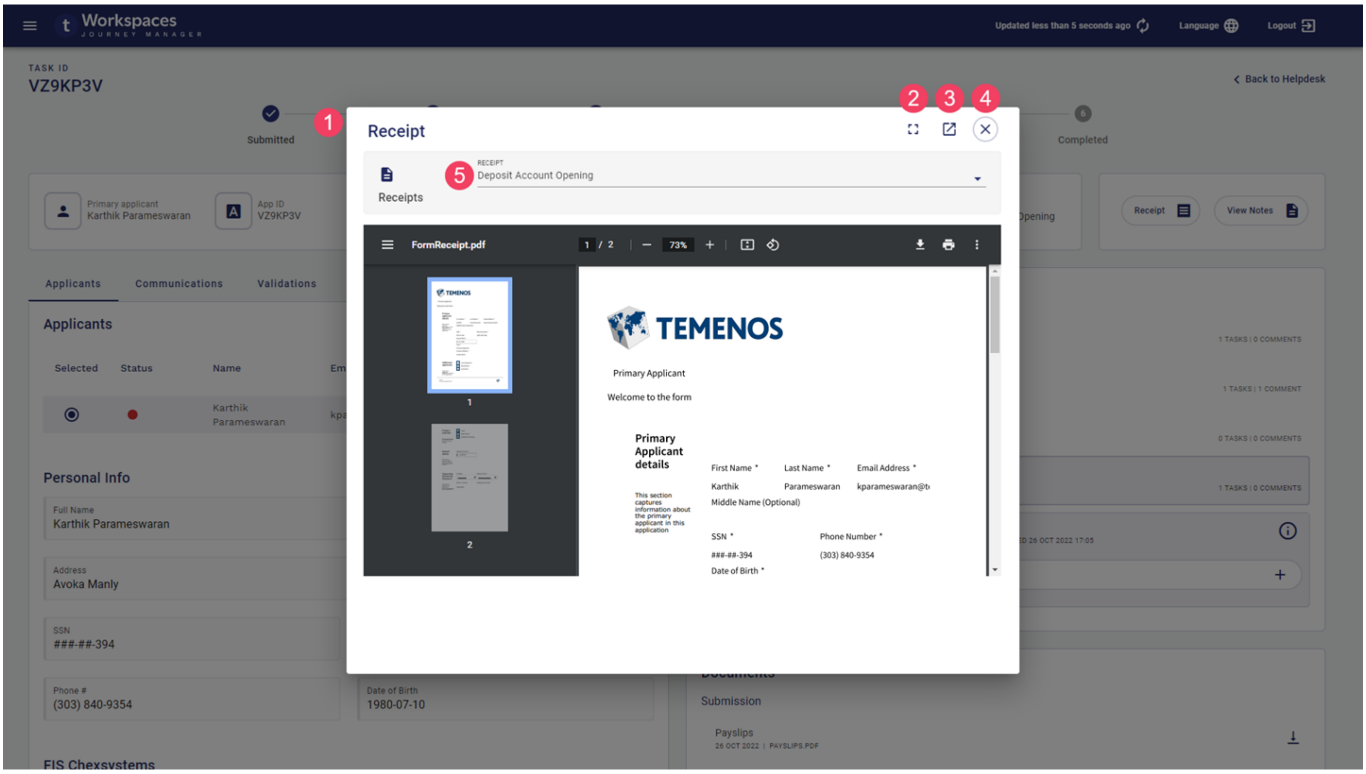
When you reassign a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

Receipt - View a Receipt

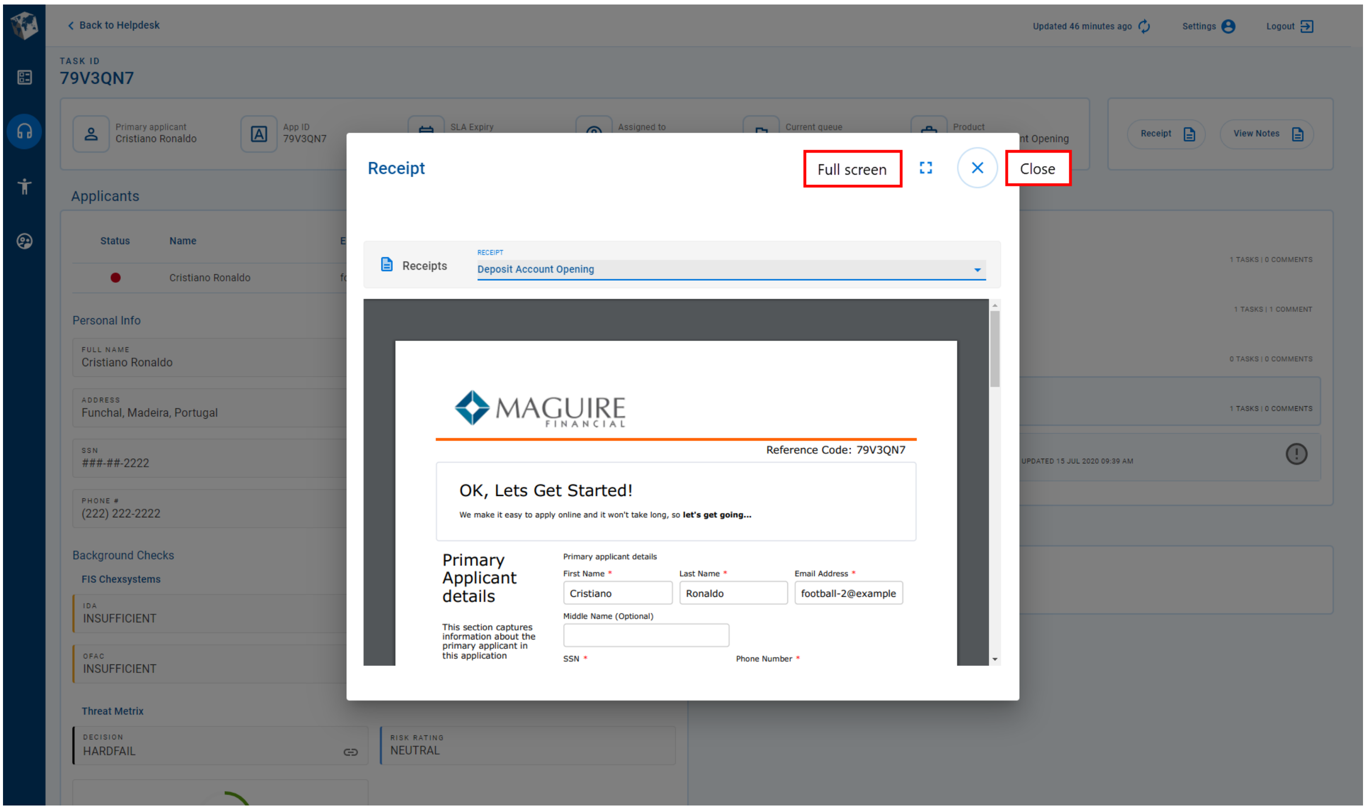
WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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.

- 22.10
- 22.04 and earlier



1. Modal window
2. Expand to full screen
3. Pop out to new tab
4. Close modal window
5. Receipt selector



A receipt is a read-only view of information submitted by an applicant or other Workspaces user, and displayed in the same form used to capture that information. You can view a receipt from any space, and for any item (application or task) even if it's not assigned to you. Each task associated with an application may have a receipt. If there are multiple receipts for an application, you can view a specific receipt using the Receipt selector at the top of the modal window. Note that viewing a receipt does not allow you to change the application in any way.

When you select the Receipt action, the receipt for the selected task is displayed unless there isn't a receipt associated with the task, in which case the most recent receipt is shown by default. However, if you're using Workspaces 22.04 or earlier, the most recent receipt is always displayed by default. | 22.10 This feature was updated in 22.10.

To view a receipt from a List screen:

1. Select any space.
2. On the List screen, 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 screen:

1. Select any space.
2. On the List screen, locate the item in the item list that you want to view, then select it to display its application details.
3. On the Details screen, 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 an Abandoned Application

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 19.11This topic was introduced with the 19.11 release | 22.10This topic was updated for the 22.10 release

NOTE

Prior to Workspaces 19.11, 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.

NOTE

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.

HOW DOES AN APPLICANT ACCESS A RECOVERED APPLICATION?

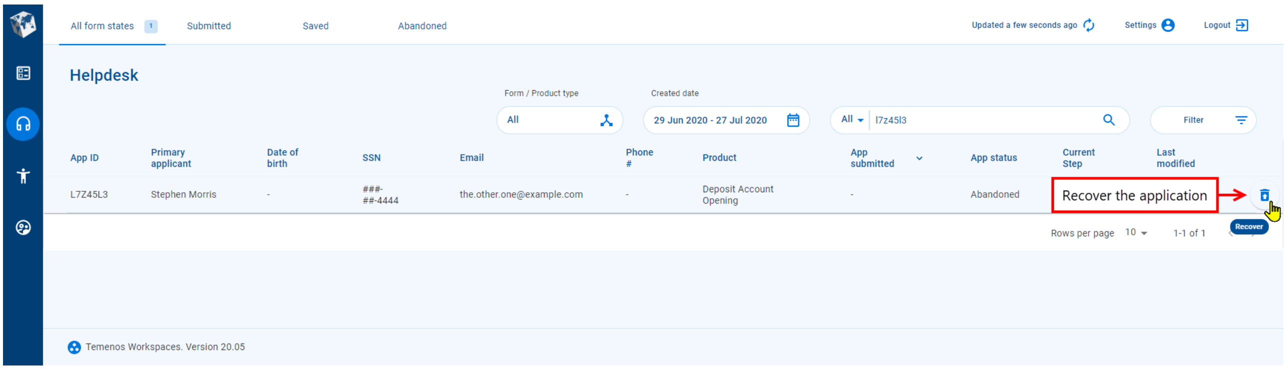
Workspaces does not mandate how an applicant can access a recovered application in the default configuration as this is an aspect that will be specific to each Workspaces portal. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their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

You can recover an application in the Helpdesk or Assisted Channel space from either the List screen or the Details screen.

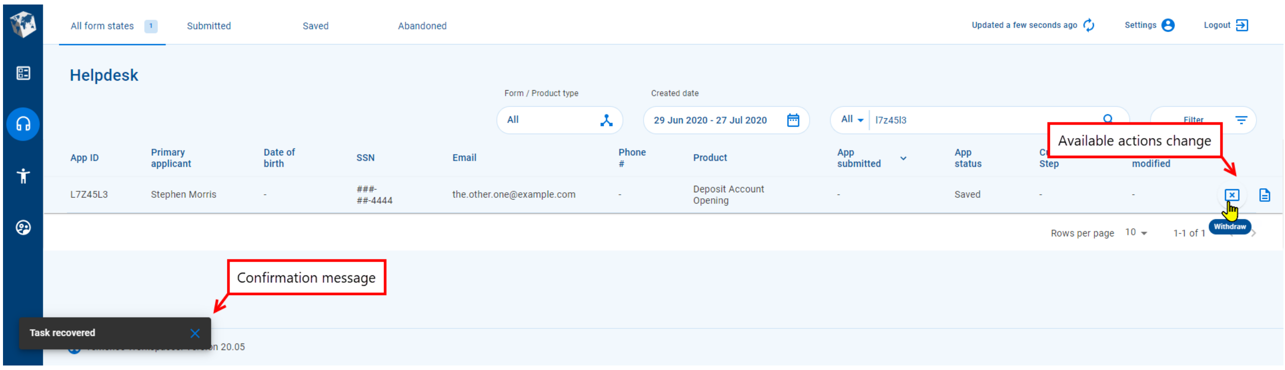
Recover from List Screen

To recover an application from a List screen:

1. Select the Helpdesk or Assisted Channel space.
2. On the List screen, locate the item in the item list for the application you want to recover. When 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. 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.



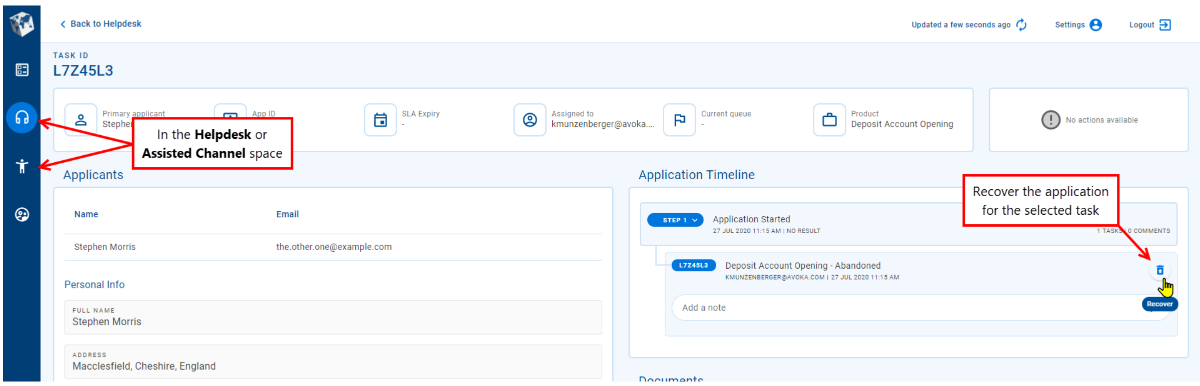
The available actions change and a message confirming you have recovered the application is displayed briefly in the bottom left corner.

From the List screen, you can also use the [Bulk Action](#) feature to recover multiple applications at once. 22.10This feature was introduced in the 22.10 release

Recover from Details Screen

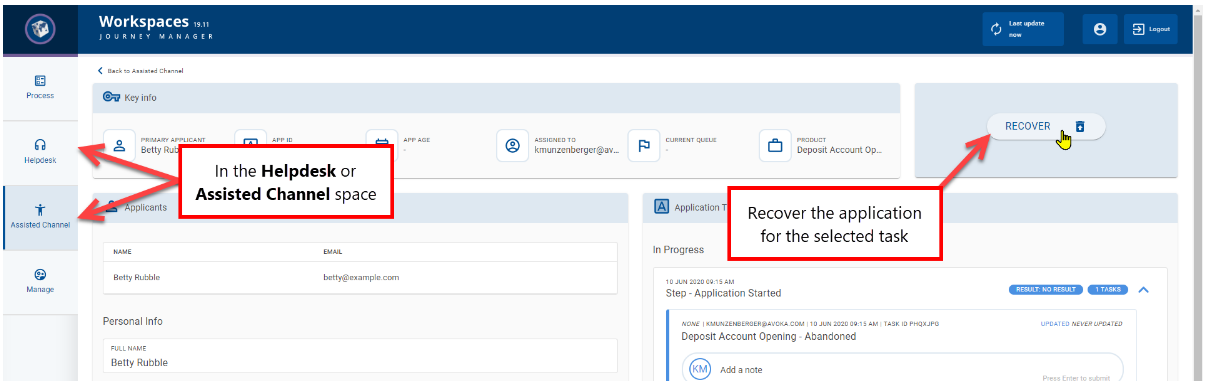
To recover an application from a Details screen:

1. Select the Helpdesk or Assisted Channel space.
2. On the List screen, locate the item in the item list for the application you want to recover. When 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 screen, click a button to recover the application:
   - **Workspaces 20.05:** Click (Recover) for the selected task in the Application Timeline.



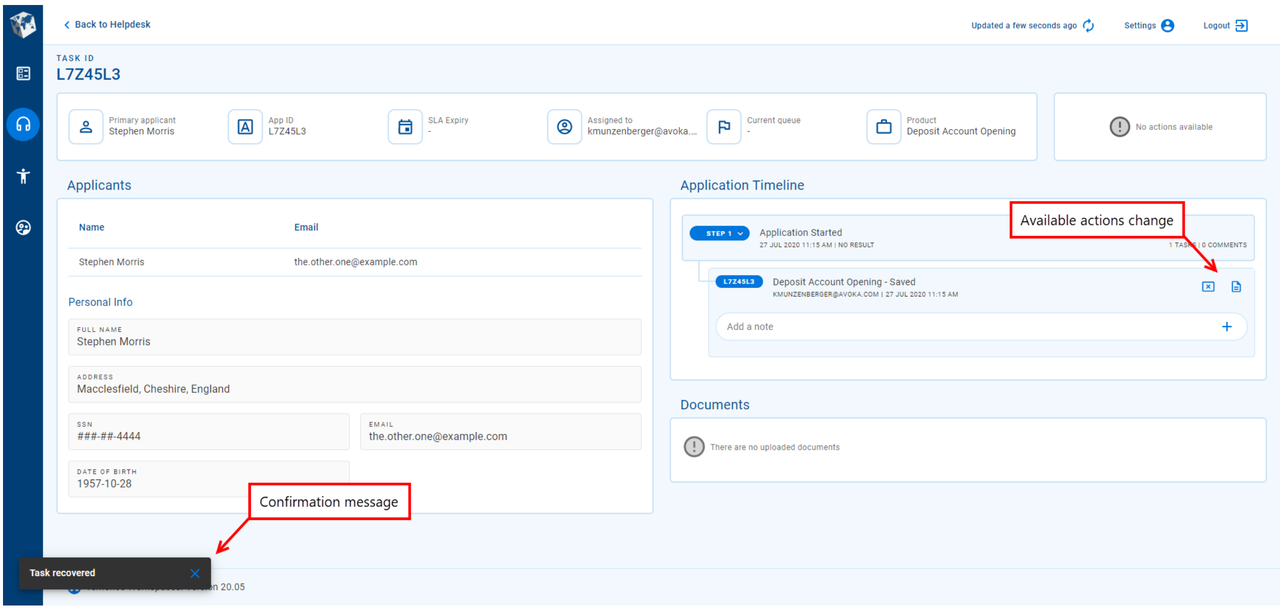
Note that the Recover action is only available for the first task of an application that has been saved but not yet submitted.

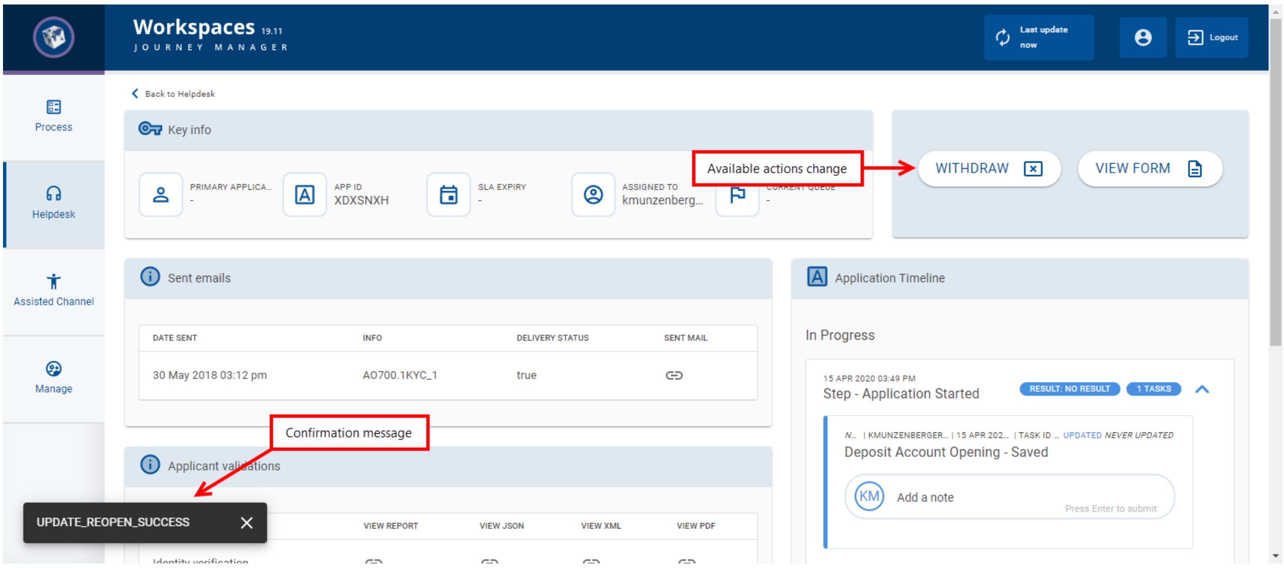
- **Workspaces 19.11 and earlier:** Click the Recover button in the Action panel.



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




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
Confirmation message
Applicant validations
UPDATE_REOPEN_SUCCESS
VIEW REPORT
VIEW JSON
VIEW XML
VIEW PDF
Application Timeline
In Progress
15 APR 2020 03:49 PM
Step - Application Started
RESULT: NO RESULT
1 TASKS
Deposit Account Opening - Saved
KM
Add a note
Press Enter to submit

Release a Task Assigned to You

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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 Task Review 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 - Remove a Task Assignment.

NOTE

If you have access to the Manage space and want to release a task so that you can assign it to someone else, a quicker way to do this is to reassign the task instead.

You can release a task in the Task Review or Helpdesk space from either the List screen or the Details screen.

Release from List Screen

To release a task from the List screen:

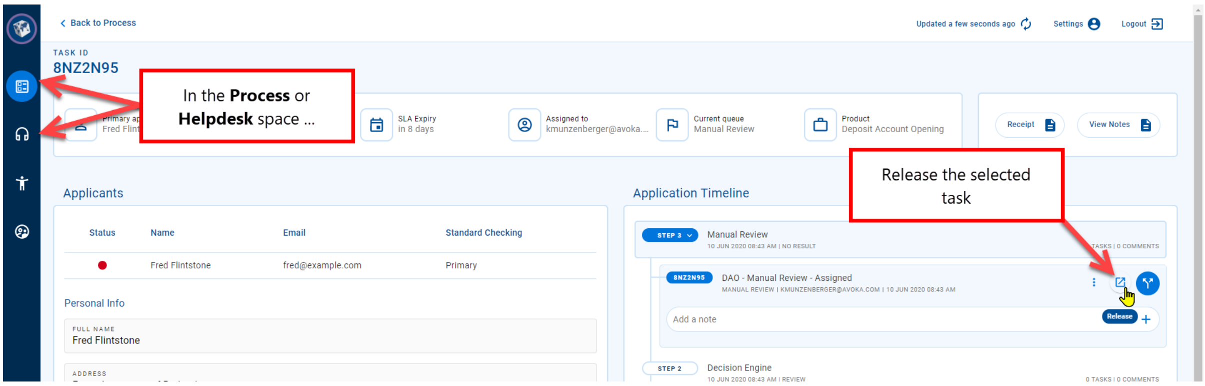
1. Select the Task Review or Helpdesk space.
2. On the List screen, locate the item in the item list for the task you want to release.
3. Point your cursor at the task item. The available actions appear at the right-hand side.
4. Click (Release). The task is no longer assigned to you, and you can confirm this by noting that your Workspaces id is removed from the Assigned column.

From the List screen, you can also use the Bulk Action feature to release multiple tasks at once. 22.10This feature was introduced in the 22.10 release

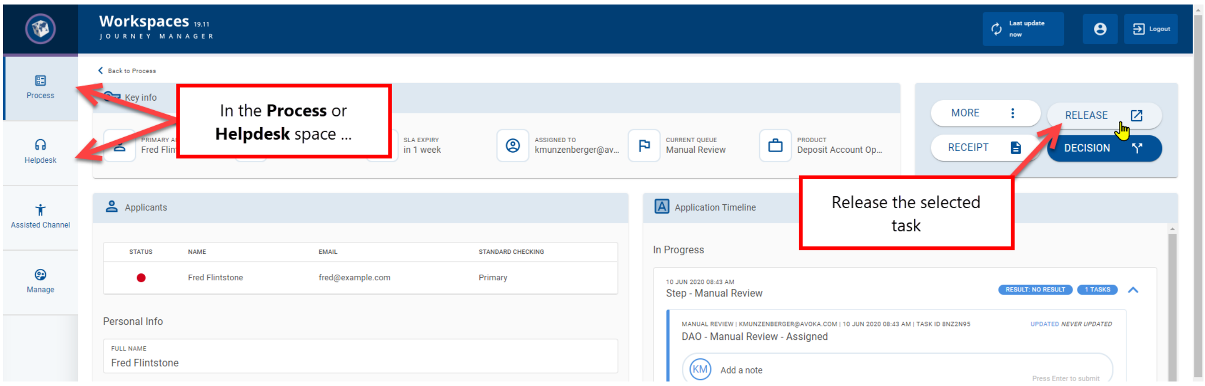
Release from Details Screen

To release a task from the Details screen:

1. Select the Task Review or Helpdesk space.
2. On the List screen, locate the item in the item list for the task you want to release. Select the task item to display its application details. .
3. On the Details screen, click a button to release the task:
    - **Workspaces 20.05:** Click (Release) for the selected task in the Application Timeline.



    - **Workspaces 19.11 and earlier:** Click the Release button in the Action panel.



The task is no longer assigned to you, and you can confirm this by noting that your Workspaces id is removed from the Assigned To field in the key information.

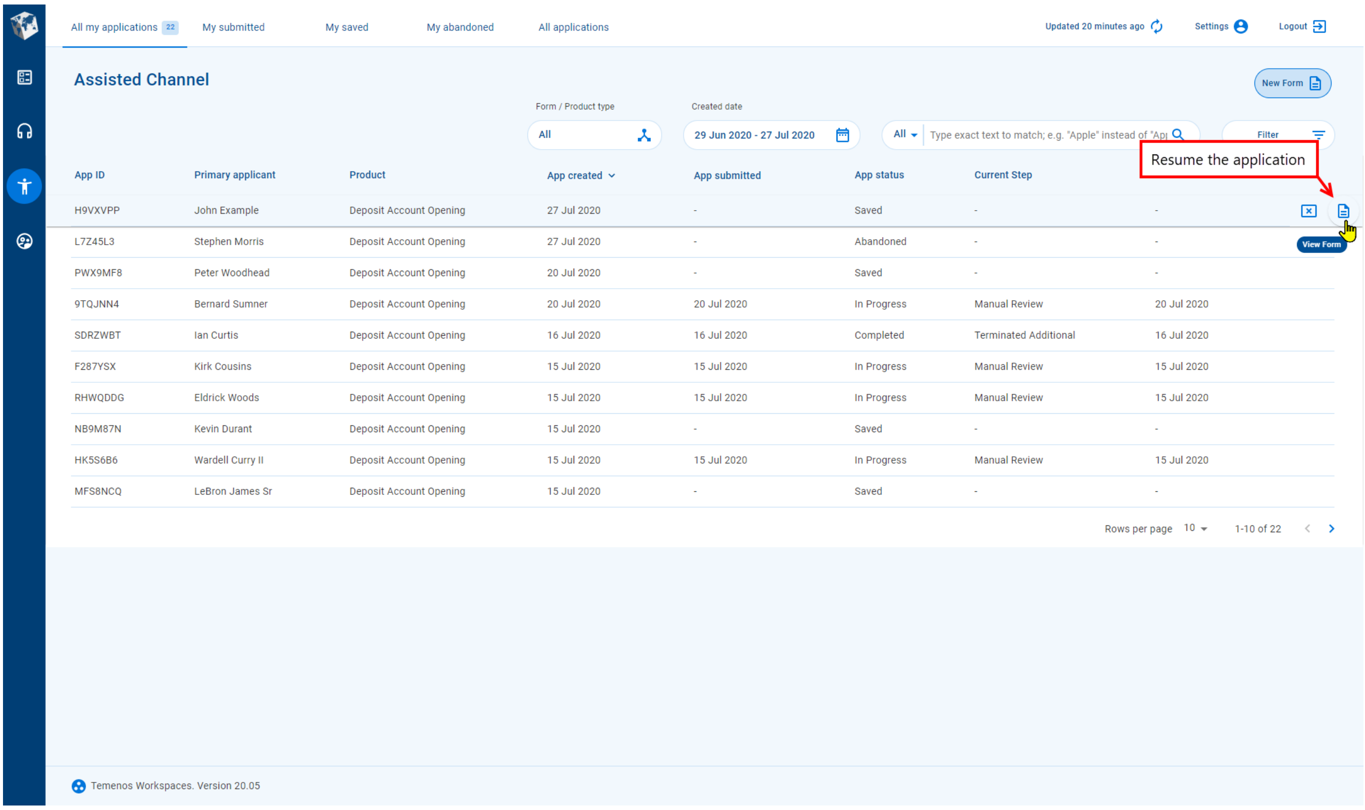
When you release a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

Resume - Resume a Saved Application

Workspaces This topic relates to Journey Workspaces | Workspaces Applicant A Workspaces Applicants space user | 21.11 This topic was introduced with the 21.11 release

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.

> NOTE
>
> 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 Applicants 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.

NOTE

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 Applicants 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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

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 unassign a task, you must be in the Manage space, and the task must be assigned to someone. Removing a task assignment returns the task to the pool of unassigned tasks, allowing it to be claimed by or assigned to 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 Task Review space, you can release it instead.

> NOTE
>
> If you have access to the Manage space and want to unassign a task so that you can assign it to someone else, a quicker way to do this is to reassign the task instead.

You can unassign a task in the Manage space from either the List screen or the Details screen.

Unassign from List Screen

To unassign a task from the List screen:

1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to unassign.
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 to you, and you can confirm this by noting that the previously assigned Workspaces id is removed from the Assigned column.

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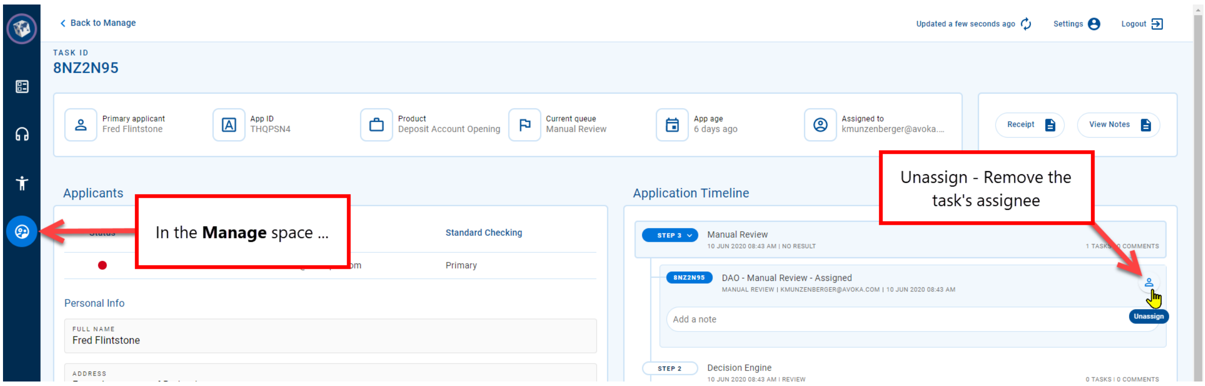
[1]A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service - quality, availability, responsibilities - are agreed between the service provider and the service user.

From the List screen, you can also use the Bulk Action feature to unassign multiple tasks at once. 22.10This feature was introduced in the 22.10 release

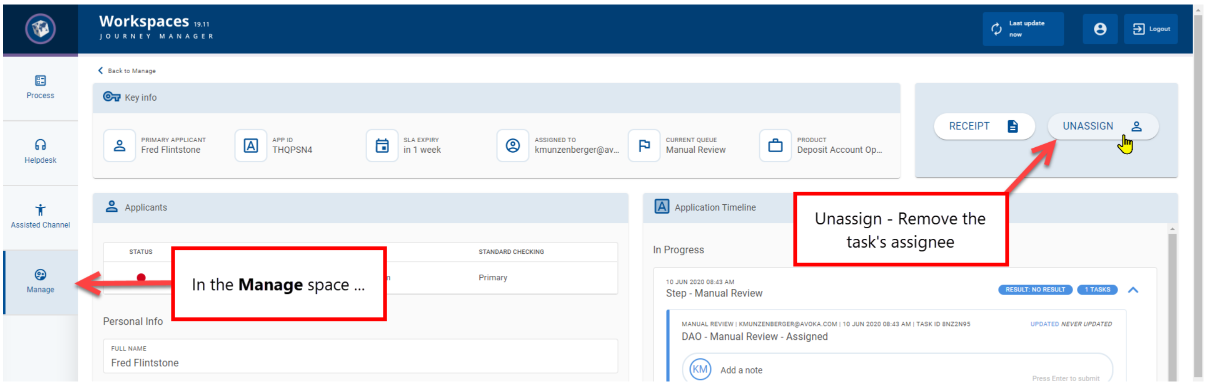
Unassign from Details Screen

To unassign a task from the Details screen:

1. Select the Manage space.
2. On the List screen, locate the item in the item list for the task you want to unassign. Select the task item to display its application details.
3. On the Details screen, click a button to remove the task assignment:
   - **Workspaces 20.05:** Click (Unassign) for the selected task in the Application Timeline.



   - **Workspaces 19.11 and earlier:** Click the Unassign button in the Action panel.



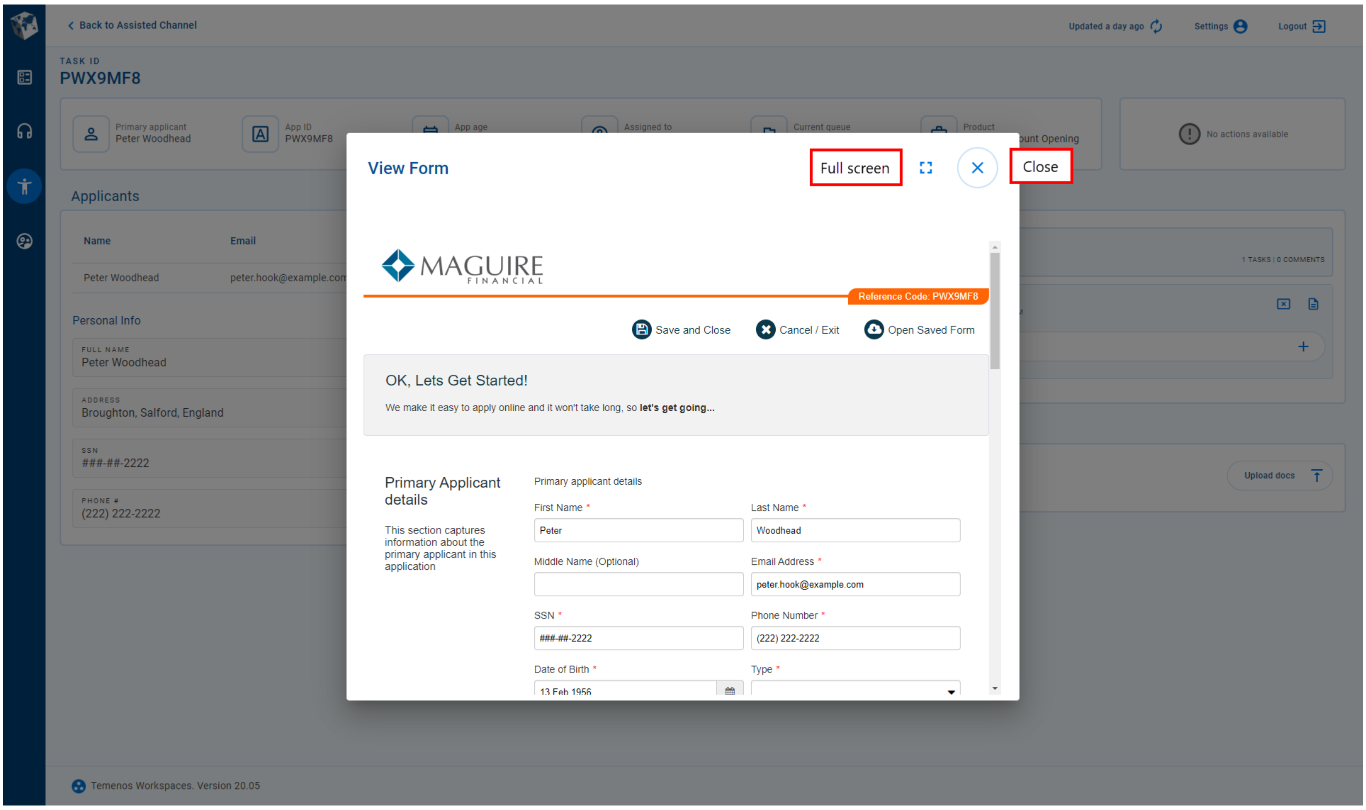
   The task is no longer assigned to you, and you can confirm this by noting that the previously assigned Workspaces id is removed from the Assigned To field in the key information.

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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 19.11This topic was updated for the 19.11 release

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 screen:

1. Select the Helpdesk or Assisted Channel space.
2. On the List screen, 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 screen:

1. Select the Helpdesk or Assisted Channel space.
2. On the List screen, locate the item that you want to view in the item list, then select it to display the application details.
3. On the Details screen, 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

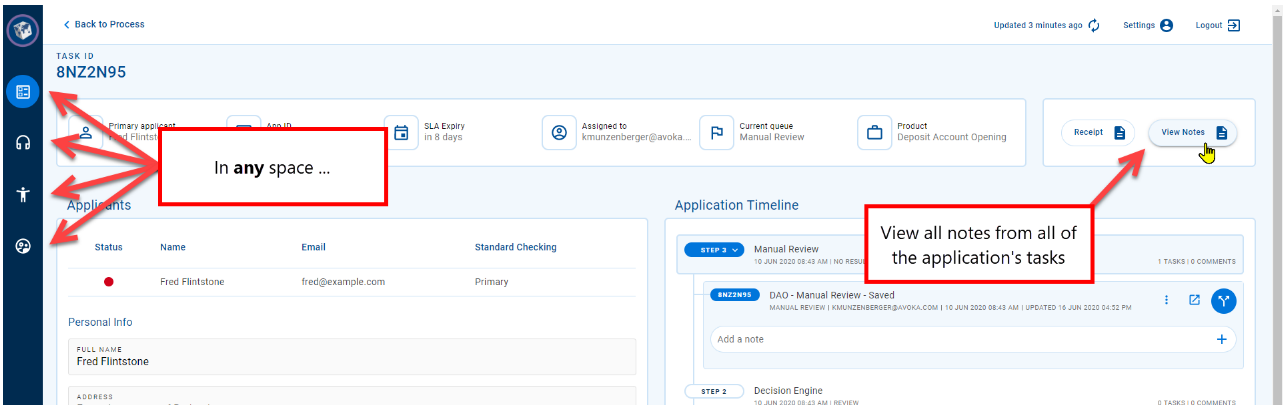
WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 20.05This topic was introduced with the 20.05 release

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. Information captured this way is stored as a comment, also referred to as a note, against the relevant task.

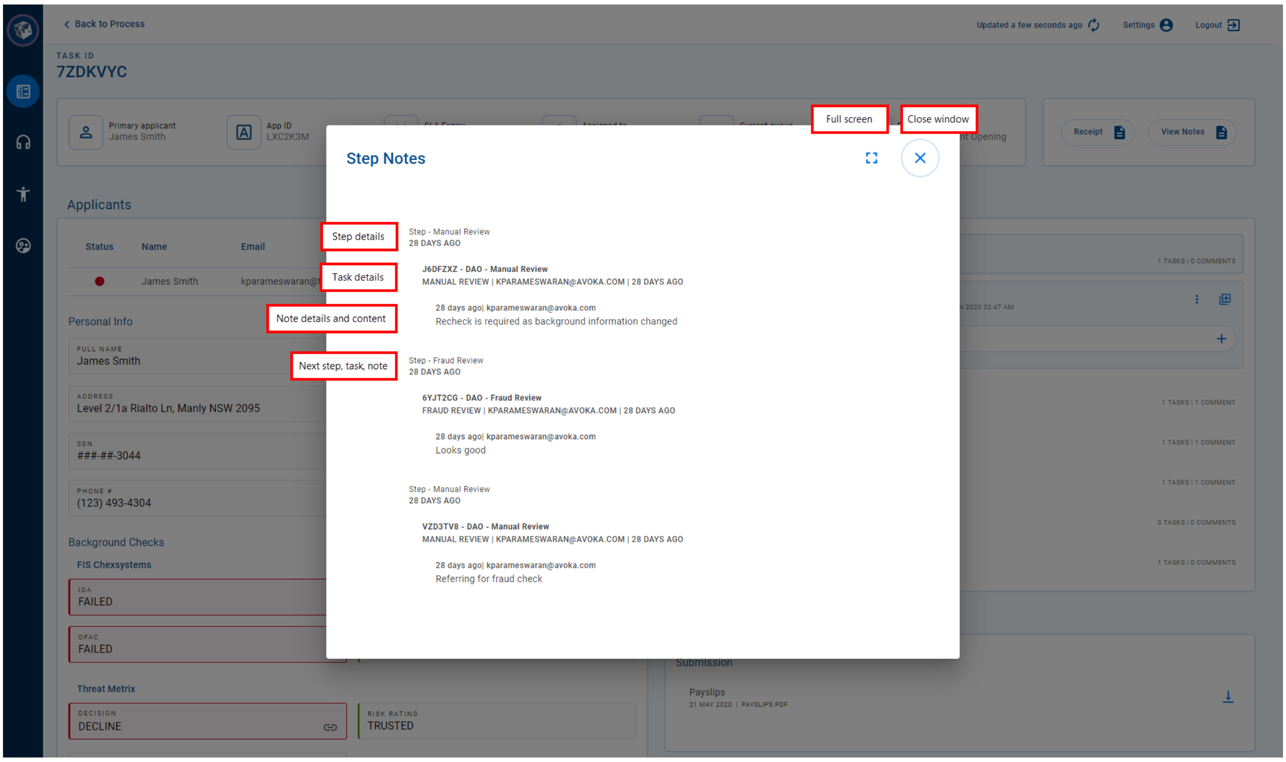
You can view notes for a specific task in the Timeline on the Details screen. This is convenient if you know which task a note was made against. But maybe you don't know which task to look at, or you want to see an overview of all notes for the application. In this instance, you can use the View Notes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

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

Withdraw - Withdraw an Unsubmitted Application

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 19.11This topic was introduced with the 19.11 release | 22.10This topic was updated for the 22.10 release

NOTE

If you're using Workspaces 19.11 or later, you can withdraw an application from within Workspaces or the Journey Manager dashboard. However, if you're using Workspaces 19.05 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 abandoned. This is important to note as it could affect an SLA relating to the processing of applications.

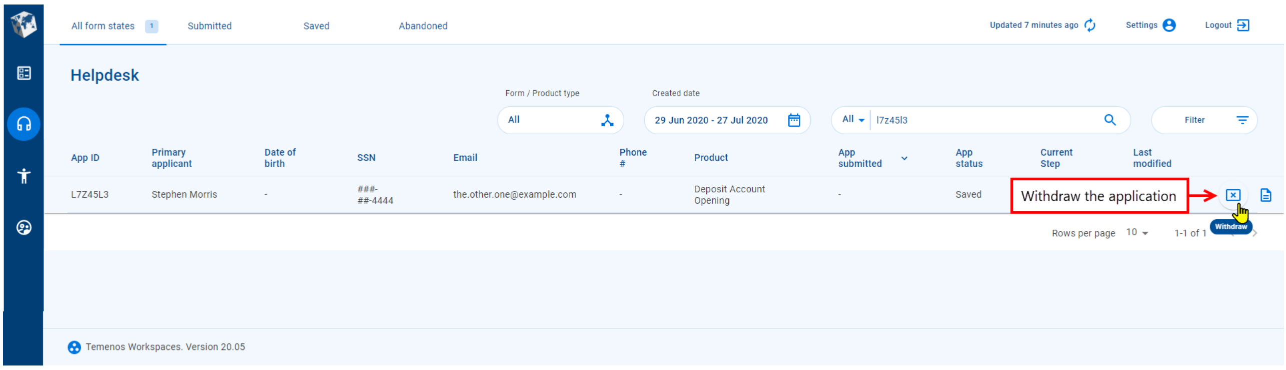
You can withdraw an application in the Helpdesk or Assisted Channel space from either the List screen or the Details screen.

Withdraw from List Screen

To withdraw an application from the List screen:

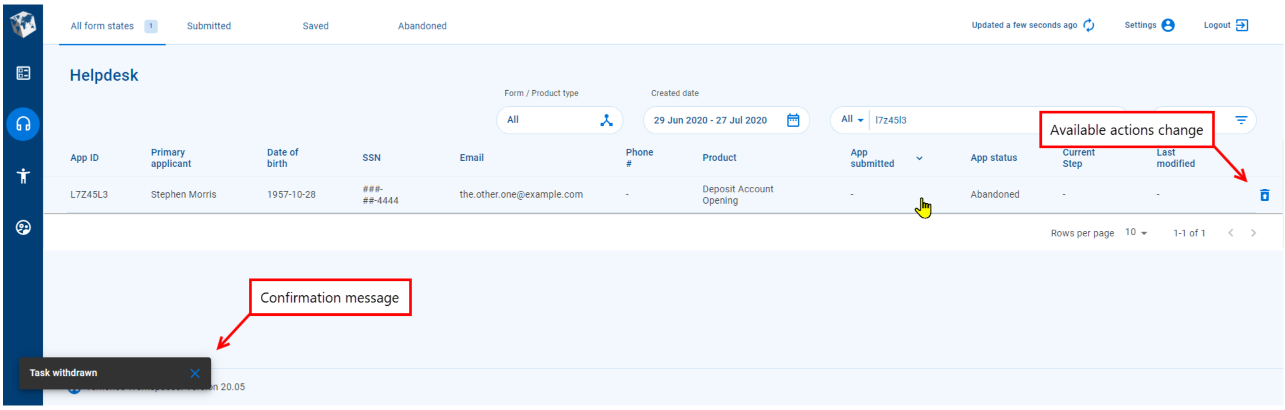
1. Select the Helpdesk or Assisted Channel space.

2. On the List screen, locate the item in the item list for the application you want to withdraw. When 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. 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.



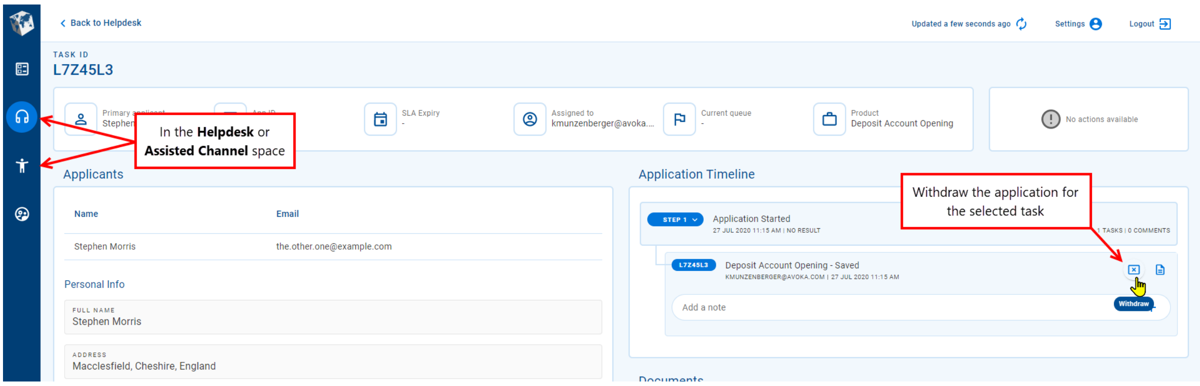
A message confirming you have withdrawn the application is displayed briefly in the bottom left corner.

From the List screen, you can also use the Bulk Action feature to withdraw multiple applications at once. 22.10This feature was introduced in the 22.10 release

Withdraw from Details Screen

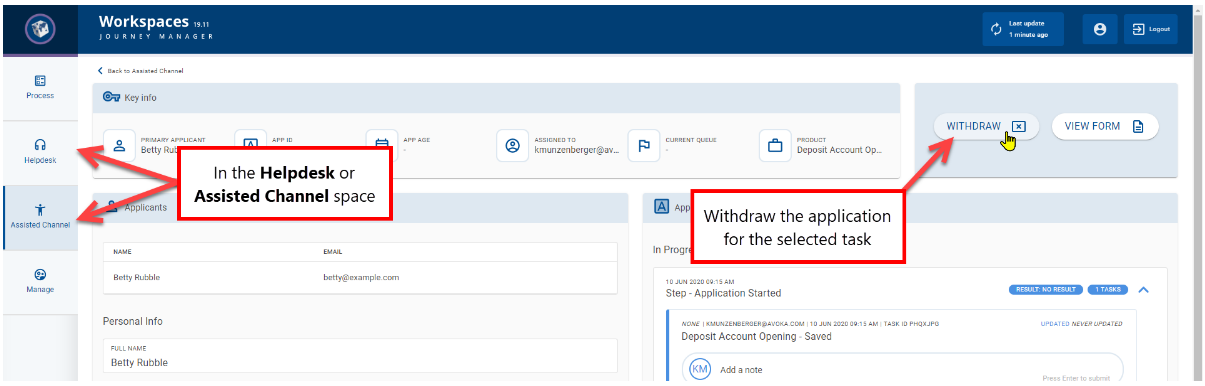
To withdraw an application from the Details screen:

1. Select the Helpdesk or Assisted Channel space.
2. On the List screen, locate the item in the item list for the application you want to withdraw. When 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 screen, click a button to withdraw the application:
    - **Workspaces 20.05:** Click ☒ (Withdraw) for the selected task in the Application Timeline.

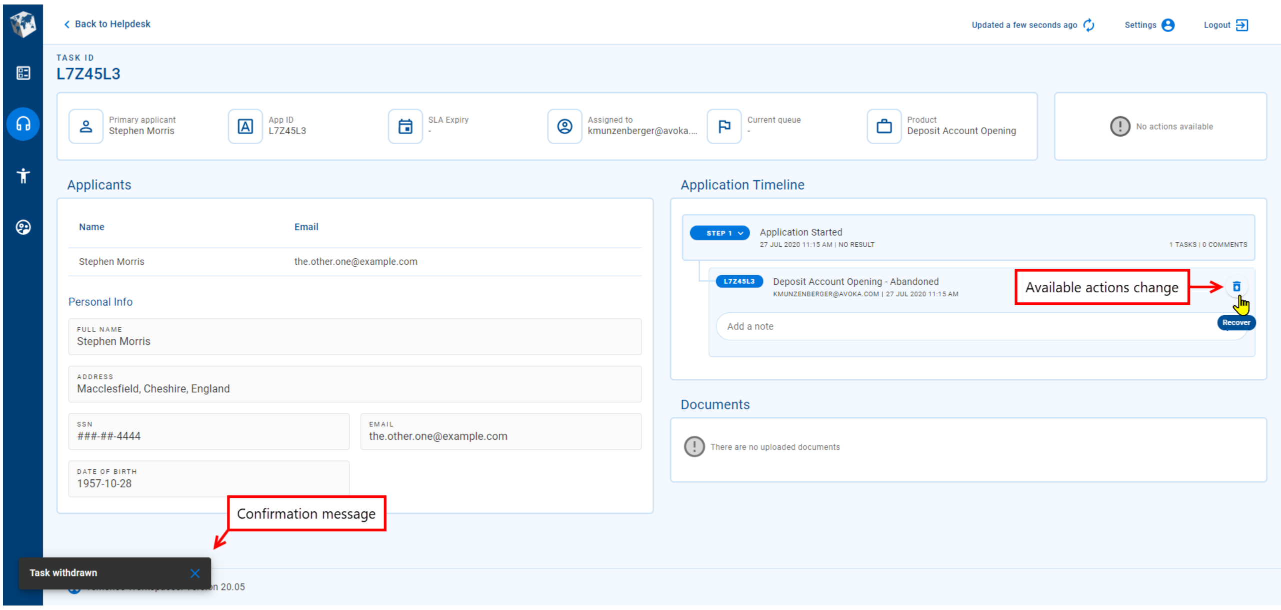


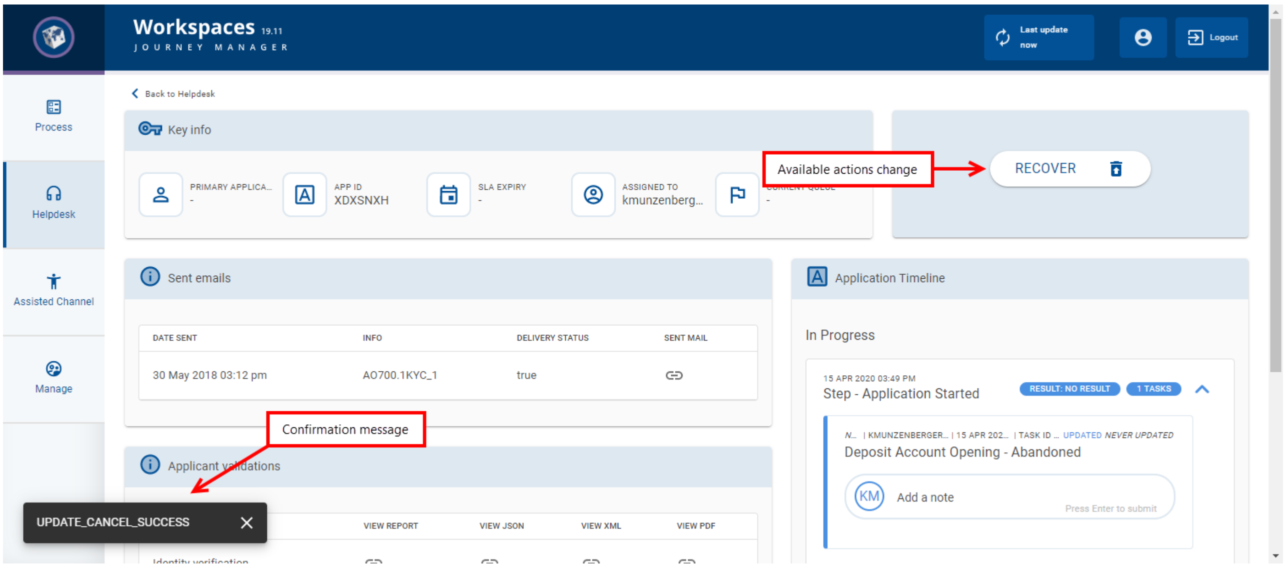
      Note that the Withdraw action is only available for the first task of an application that has been saved but not yet submitted.

    - **Workspaces 19.11 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
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
Application Started
Deposit Account Opening - Abandoned
Available actions change
Add a note
Recover
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
Confirmation message
Applicant validations
VIEW REPORT
VIEW JSON
VIEW XML
VIEW PDF
UPDATE_CANCEL_SUCCESS
Application Timeline
In Progress
15 APR 2020 03:49 PM
Step - Application Started
RESULT: NO RESULT
1 TASKS
Deposit Account Opening - Abandoned
Add a note
Press Enter to submit

Reviewing Applications

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described 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. Pending applications are referred to bank 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 **Task Review** space for reviewing applications, complete with a List screen and a Details screen. These screens are configured with features that help to make processing applications fast and efficient.

The Document Requests space works in conjunction with the Task Review space to provide a mechanism for applicants and reviewers to communicate; in particular, to ensure all required supporting documents are attached to an application. | 22.10 This feature was introduced in 22.10.

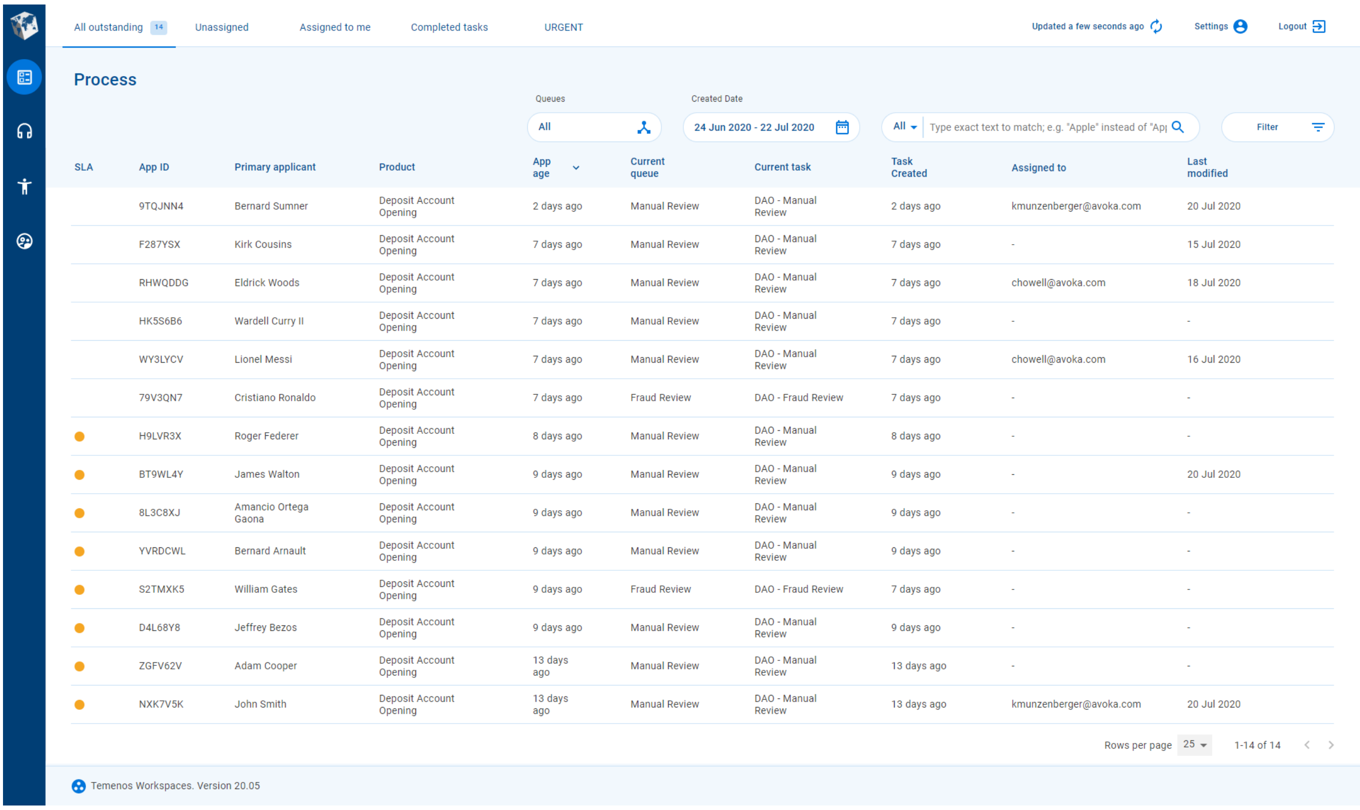
List Screen

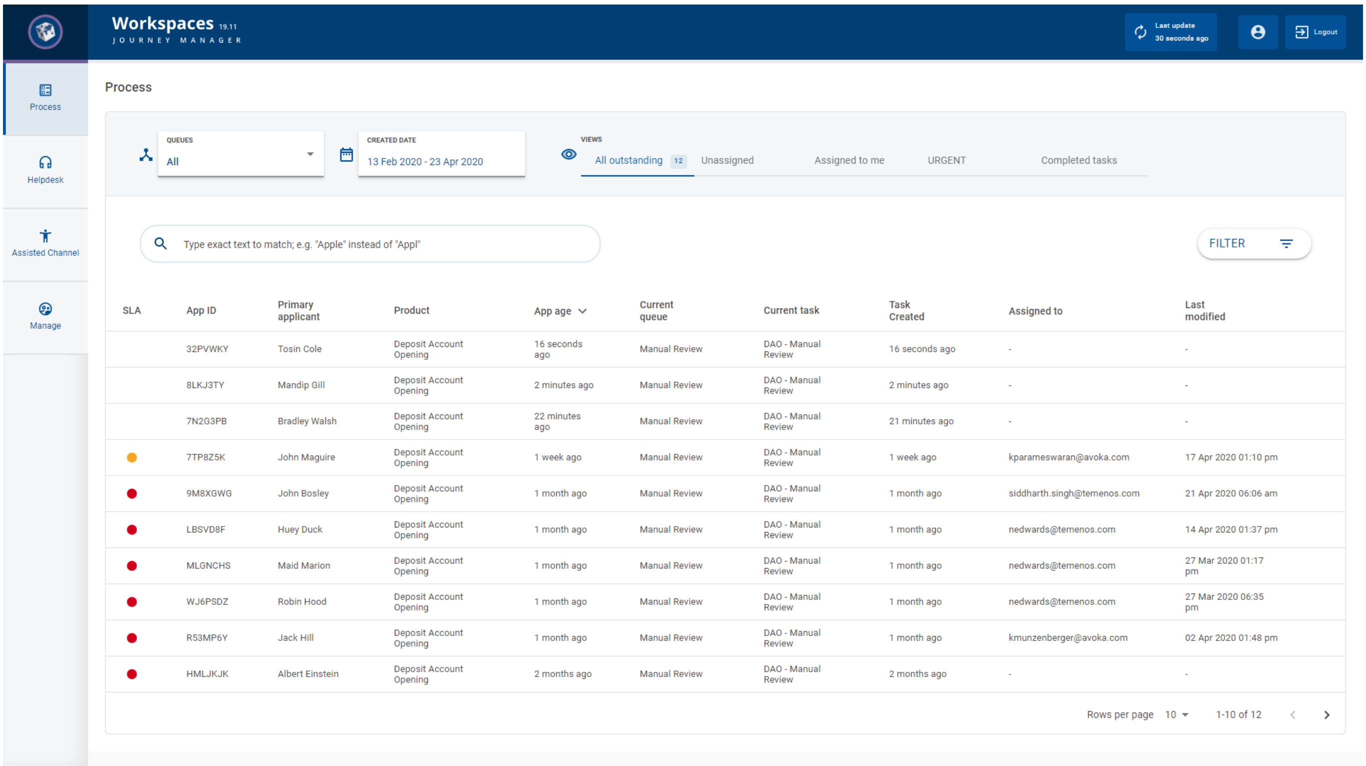
The List screen in the Task Review space includes all of the standard features of a Workspaces List screen.

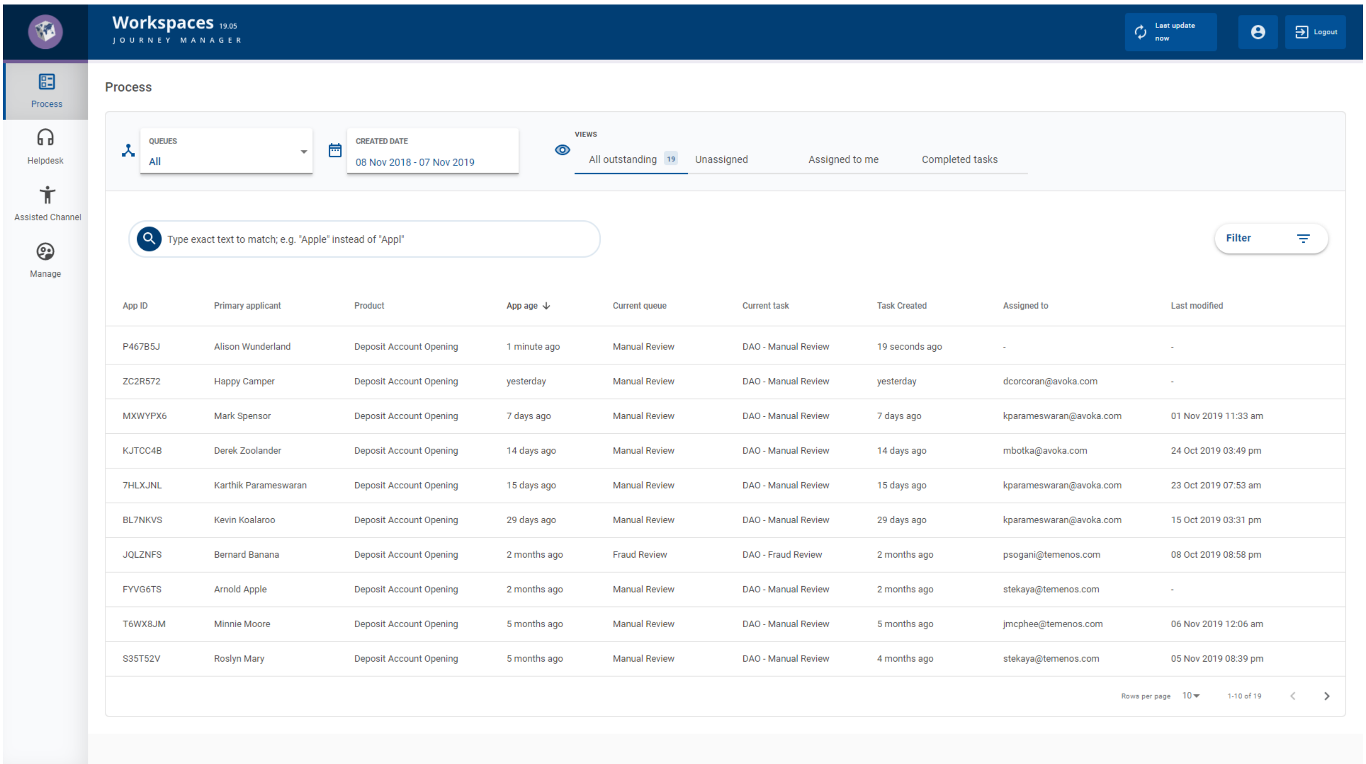
- An item list populated with tasks sourced from the active queue.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11 This feature was introduced in 19.11.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- 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.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.
- A Bulk Action mode switch to change between acting on a single task or multiple tasks. | 22.10 This feature was introduced in 22.10.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- 20.05 and later
- 19.11
- 19.05 and earlier







The Task Review space's List screen displays a list of tasks from the selected queue, and 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 Task Review Actions below.

Details Screen

The Details screen in the Task Review 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. 19.11This feature was introduced in the 19.11 release
- A set of standard actions that you can perform in the Task Review space at the current stage of the application's life cycle. 20.05This feature was introduced in the 20.05 release
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release

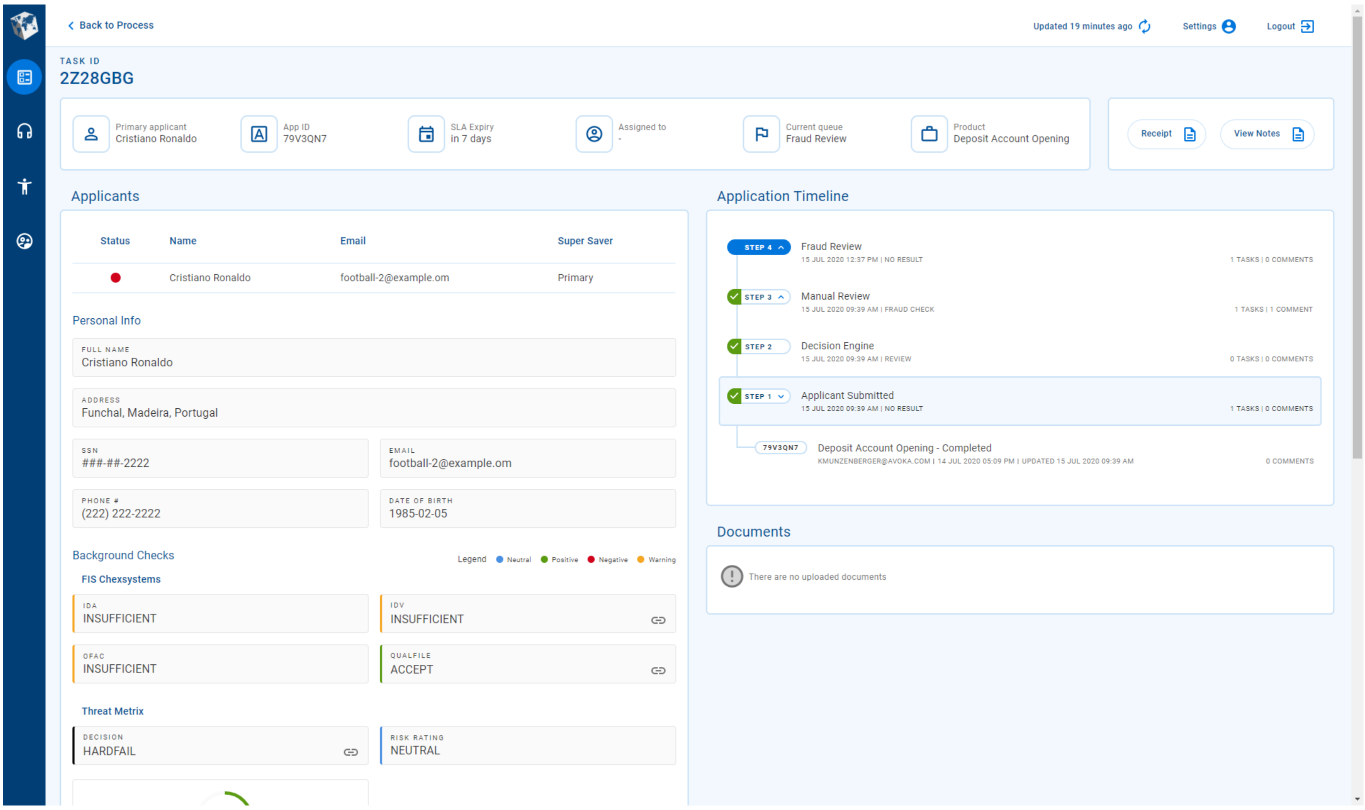
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details. 19.11This feature was introduced in the 19.11 release
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability. 19.11This feature was introduced in the 19.11 release

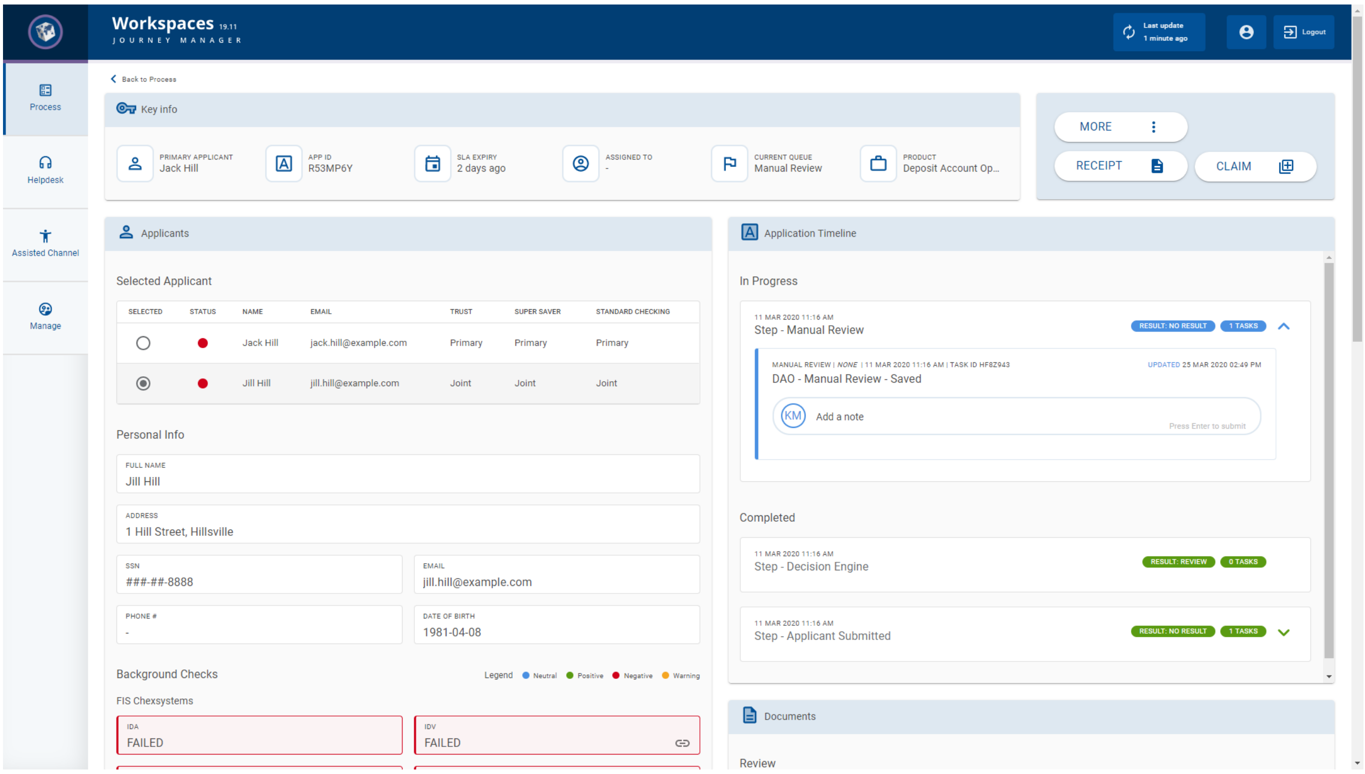
  The other custom information, shown on additional tabs, includes:
  - A checklist of documents that need to be uploaded, as well as an upload status for each document. 22.10This feature was introduced in the 22.10 release
  - Any other custom information that is not included in the standard cards, or that is presented differently.

- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release
- 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. 20.05This feature was introduced in the 20.05 release
- Attached documents relating to verification of applicant details, used during the processing of the application. 19.11This feature was introduced in the 19.11 release | 22.10This feature was updated in the 22.10 release

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

- v20.05
- v19.11 and earlier





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 Task Review space, including examples of how to use them.

Claim and Release Tasks

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 screen in the Task Review 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 prefilled 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.

Action Examples

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

There are examples for the following actions below.

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

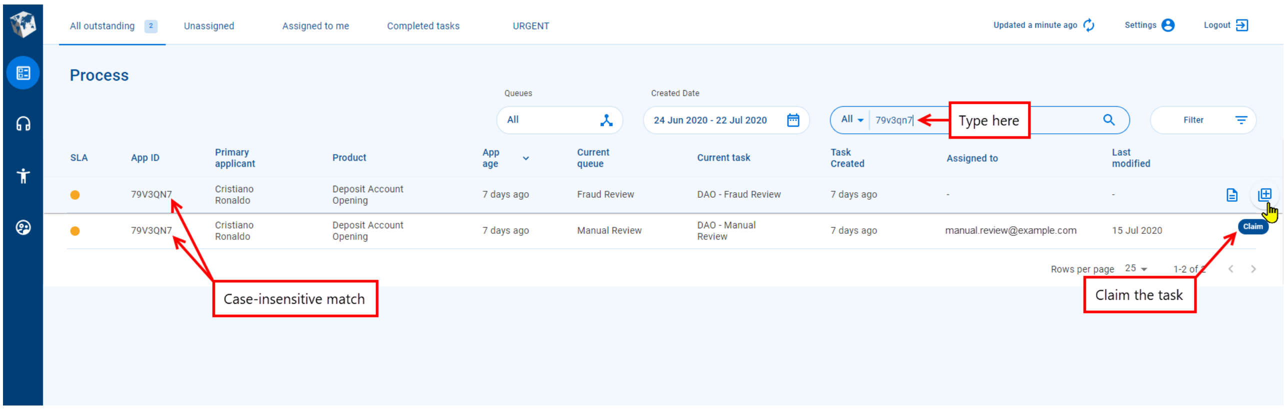
Step-by-step examples are also available for other actions that you may find useful while processing applications.

- [View a receipt]() on the (Helpdesk) Details screen
- [View all notes]() for an application on the Details screen
- [Upload a document]() on the Details screen

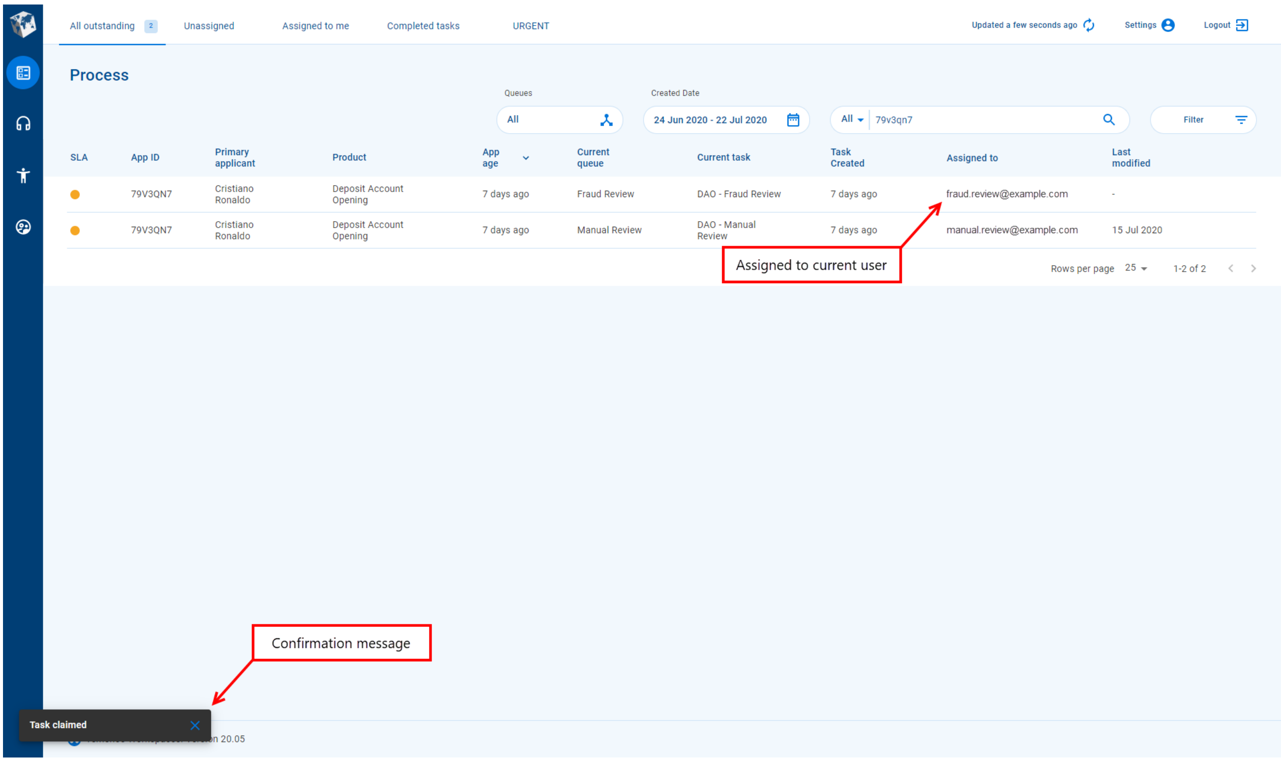
Claim a Task

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

1. Login to Workspaces and select the Task Review space. The List screen 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.

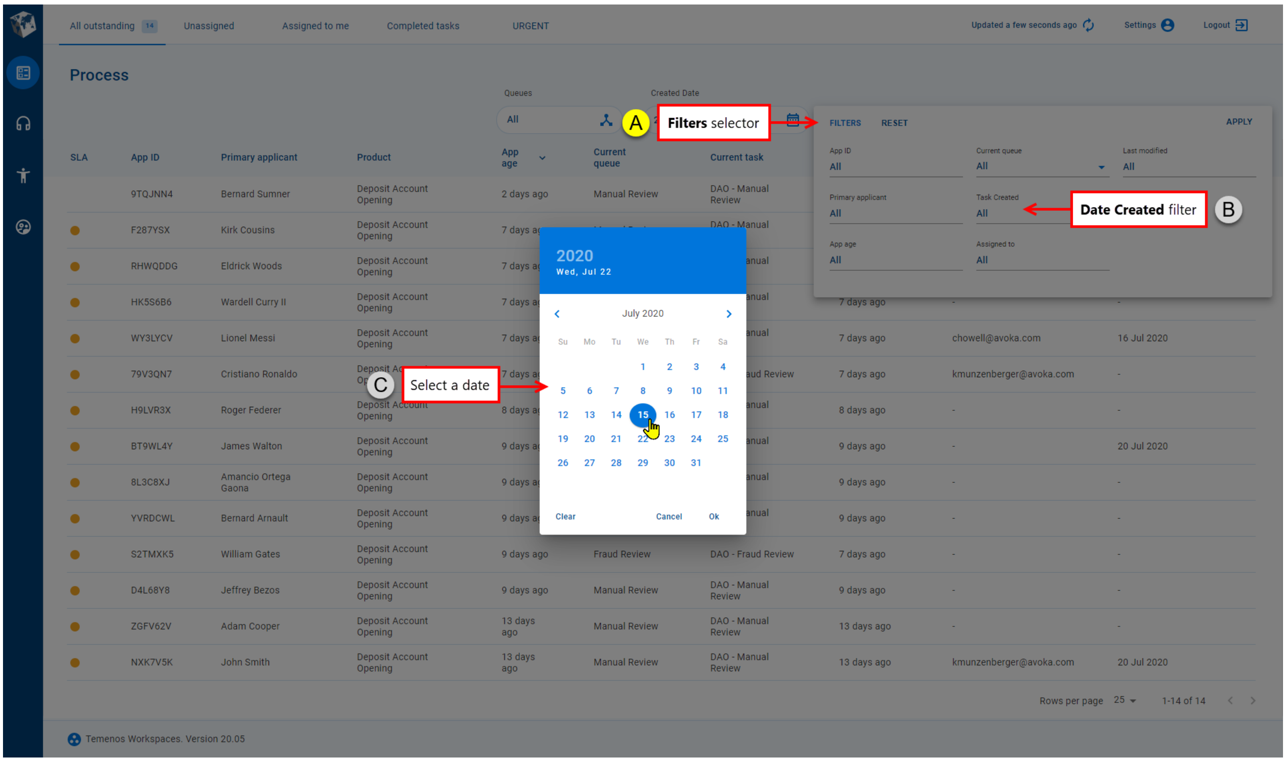


Alternatively, you can click the task to display its application details and then click the Claim button on the Details screen.

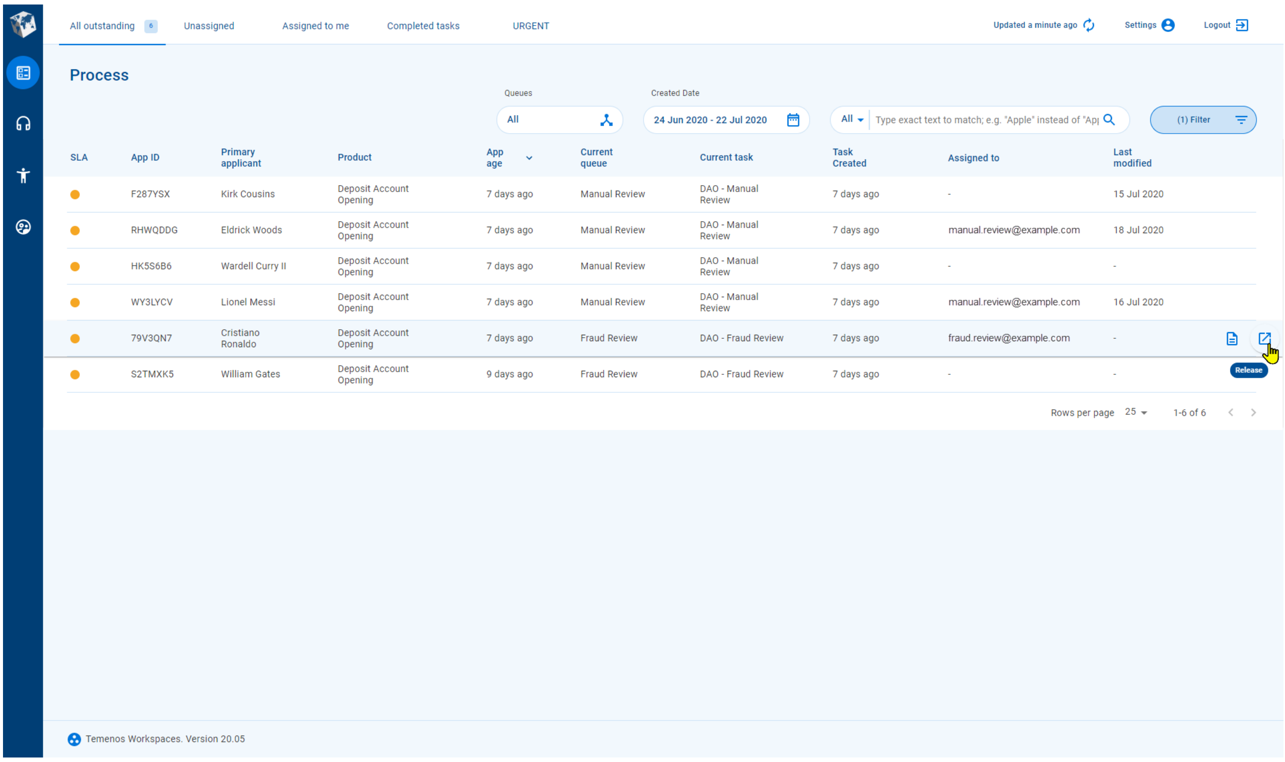
Release a Task

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 Task Review 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.

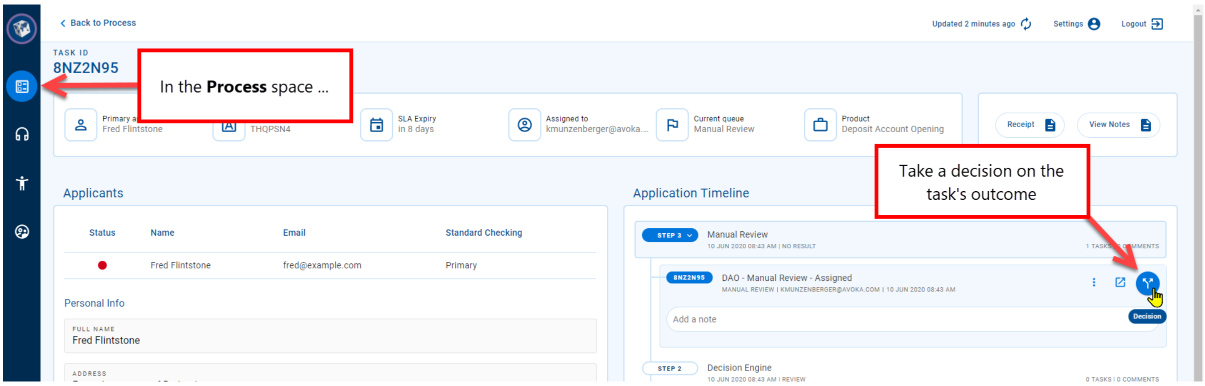


Alternatively, you can click the task to display its details, then click Release on the Details screen.

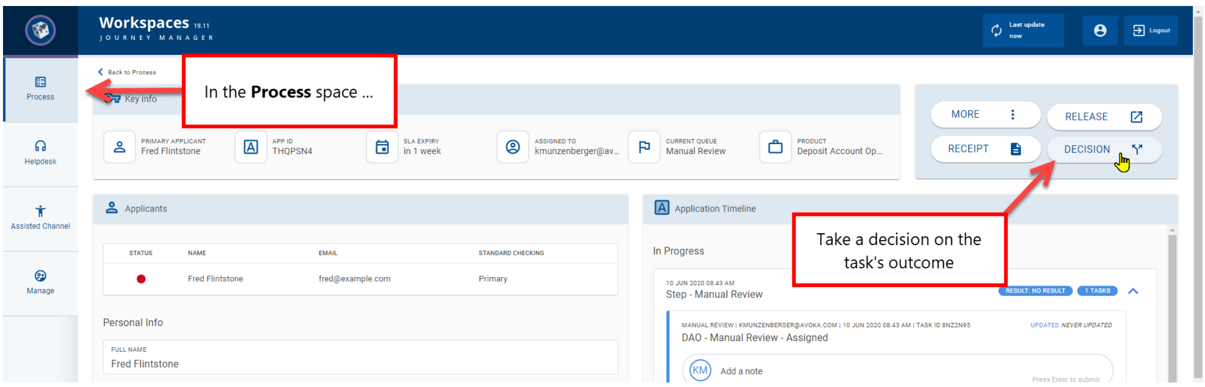
Approve an Application

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.

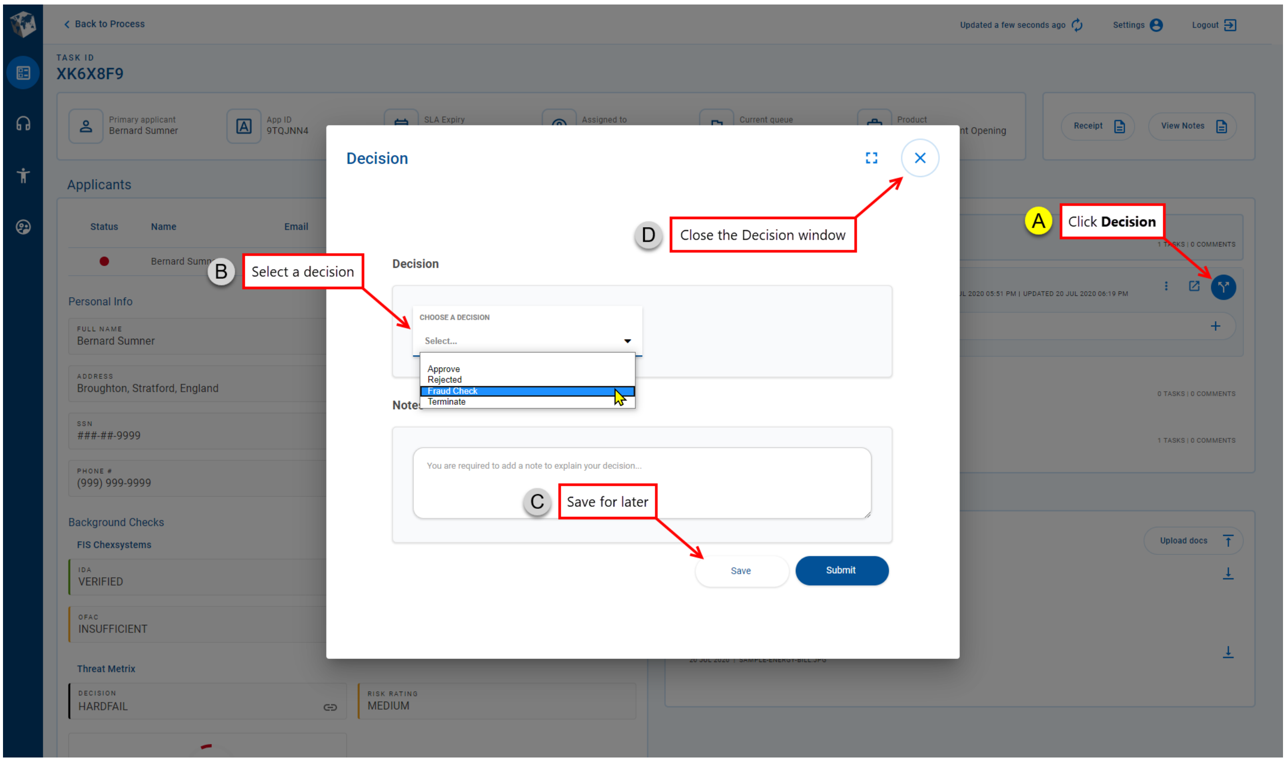
1. Follow the steps in the previous example to [claim a task](). Note that you could replace the search with any options that help you to locate the task. You can skip this step if you've just done it or if the task you want to act on is already assigned to you.
2. Click the task to display it's application details then click a Decision button to display the Decision window.
   - **Workspaces 20.05:** Click (Decision) for the selected task in the Application Timeline.



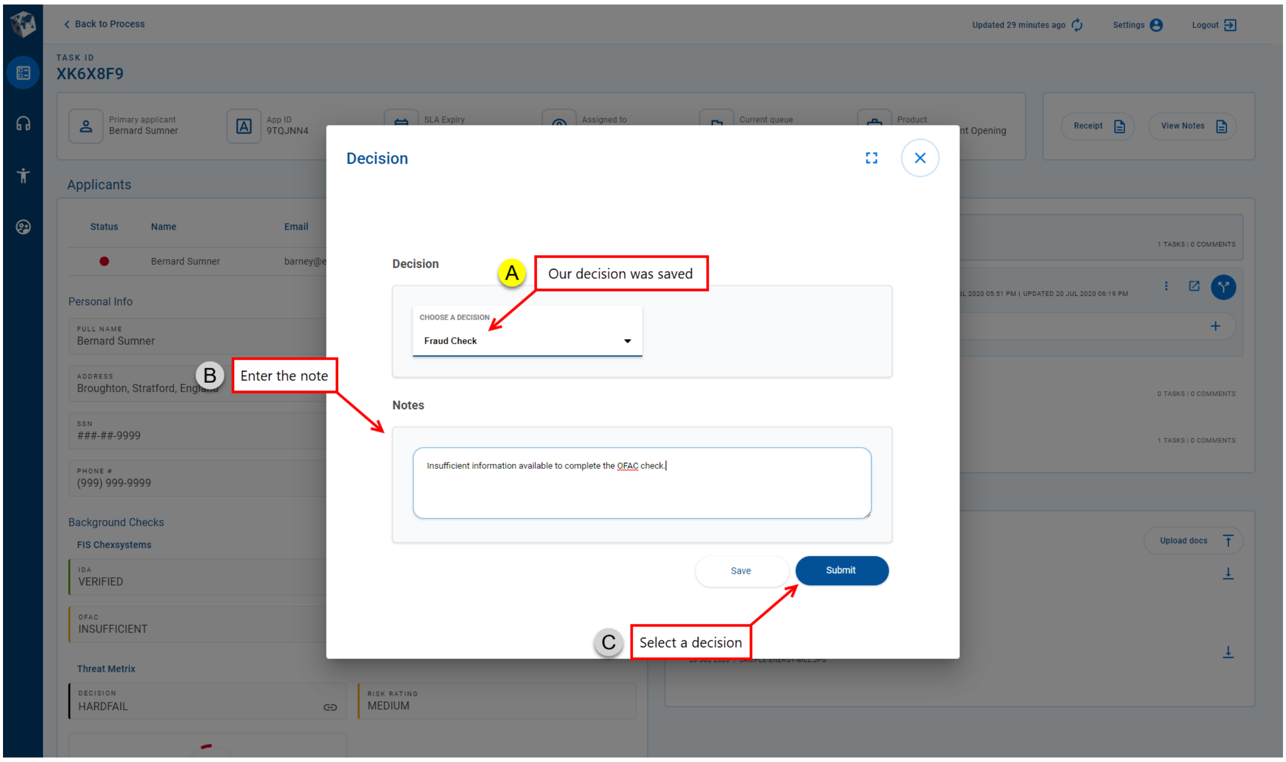
   - **Workspaces 19.11 and earlier:** Click the Decision button in the Action panel.



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 screen.



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 Task Review space List screen 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.

Request Documents During Application Review

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 22.10This topic was introduced with the 22.10 release

NOTE

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Applications submitted by new and existing customers are not always able to be approved or declined immediately. Sometimes this is because the applicant has not attached all of the required documents that support the information they have entered in their application. 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 **Document Requests** space for requesting supporting documents to be uploaded while reviewing applications, complete with a List screen and a Details screen. These screens are configured with features that help to make processing applications fast and efficient.

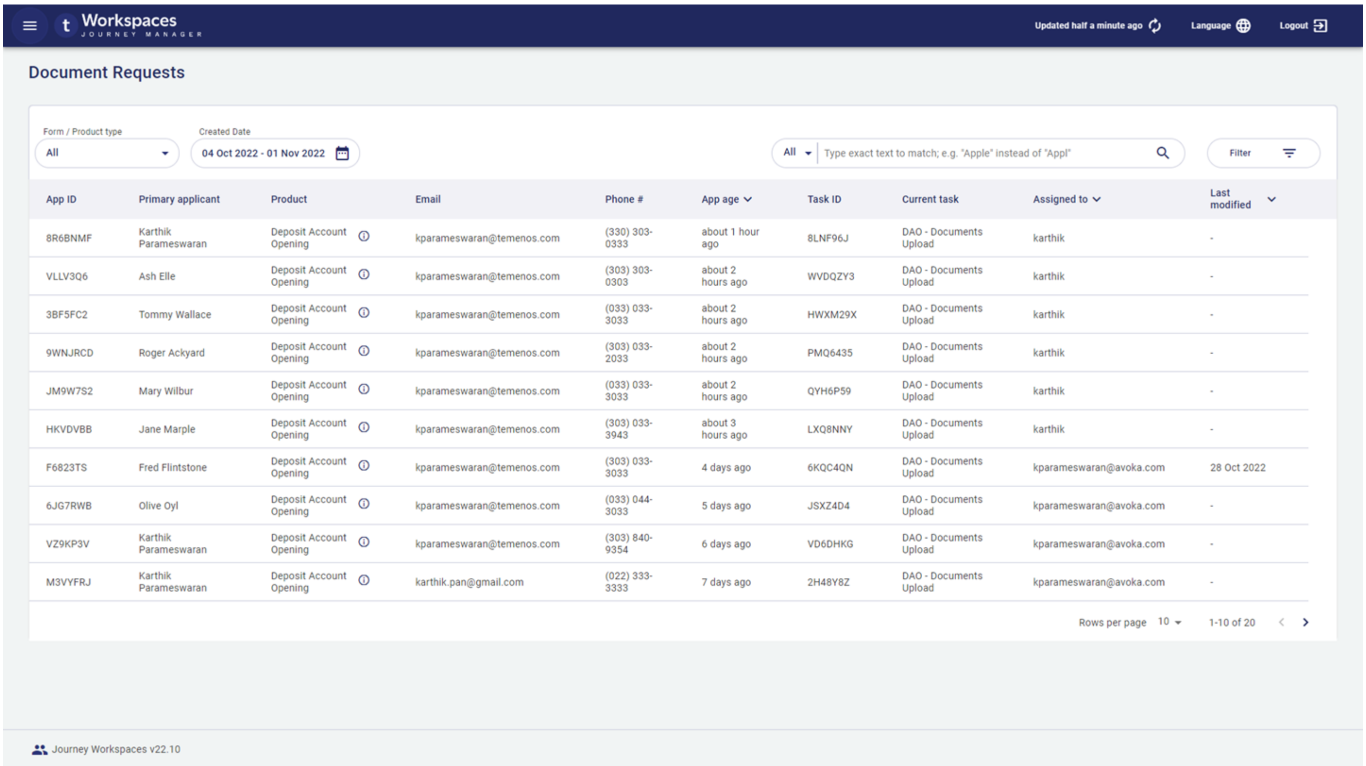
The Document Requests space works in conjunction with the Task Review space to provide a mechanism for applicants and reviewers to communicate; in particular, to ensure all required supporting documents are attached to an application.

List Screen

The List screen in the Document Requests space includes all of the standard features of a Workspaces List screen.

- An item list containing a list of tasks for applications that require supporting documents to be uploaded.
- A Form / Product Type global filter that restricts the applications in the item list to just those that require supporting documents to be uploaded.

- A second global filter, Created Date, that restricts the tasks in the item list based on the date they were created.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.



The Document Requests space's List screen displays a list of application tasks matching the Form / Product Type `Additional Documents`, and 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, 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 Document Requests Actions below.

Details Screen

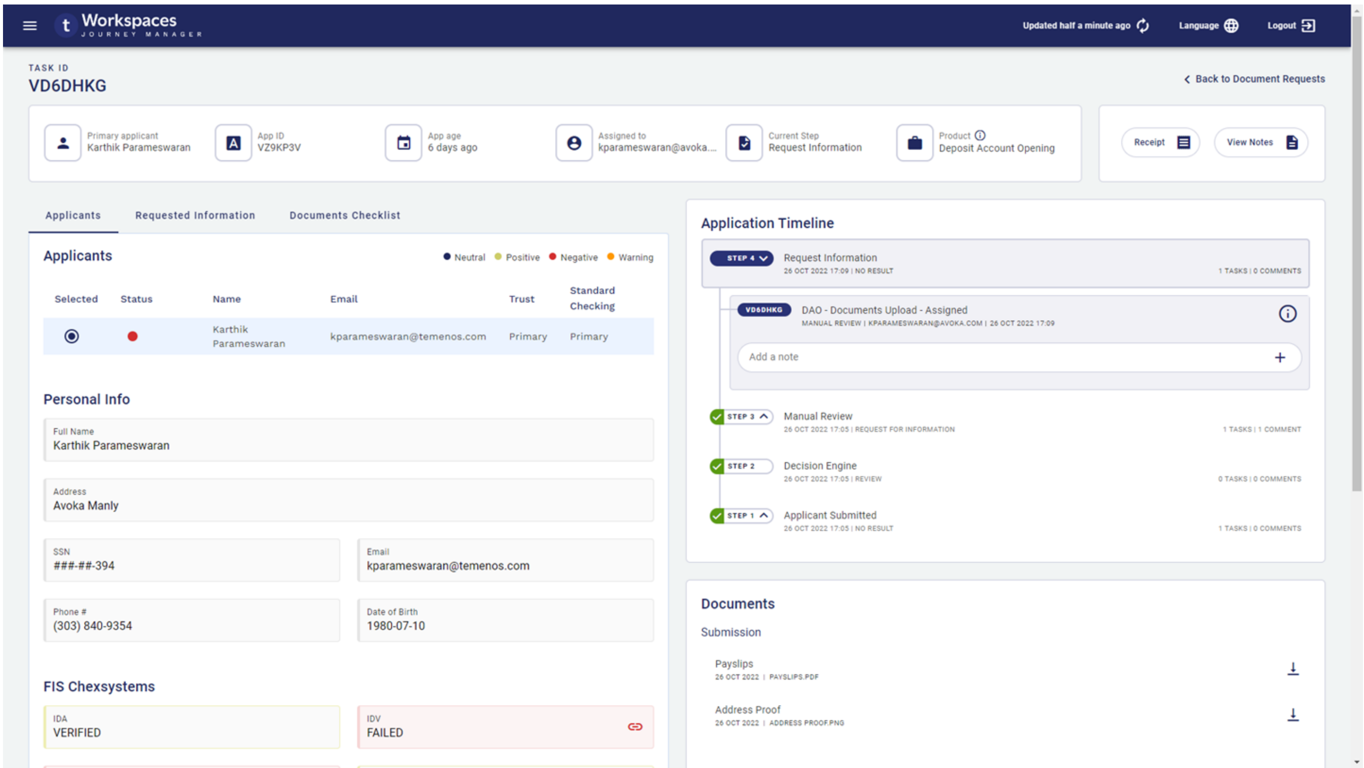
The Details screen in the Document Requests space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected application and its tasks, and provides access to actions for handling document upload requests. This includes the following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

- Key information about the selected application and its tasks that may be helpful when handling document upload requests.
- A set of standard actions that you can perform at the current stage of the application's life cycle.
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release

  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details.
  - Personal information for the selected applicant, including identity and contact details.
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability.

  The other custom information, shown on additional tabs, includes:
  - A list of messages, forming a conversation between the applicant and reviewer about uploading documents. 22.10This feature was introduced in the 22.10 release
  - A checklist of documents that need to be uploaded, as well as an upload status for each document. 22.10This feature was introduced in the 22.10 release
  - Any other custom information that is not included in the standard cards, or that is presented differently.
- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release
- 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.
- Attached documents relating to the application. |

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



Actions

The actions available in the Document Requests space are:

- Receipt: See a read-only view of a submitted application.
- View Notes: View all of the notes from all of an application's tasks.

Action Examples

Step-by-step examples are available for actions that you may find useful while handling document upload requests.

- View all notes for an application on the Details screen

Workspaces Helpdesk

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 19.05This topic was introduced with the 19.05 release | 22.10This topic was updated for the 22.10 release

NOTE

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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 screen and a Details screen 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.

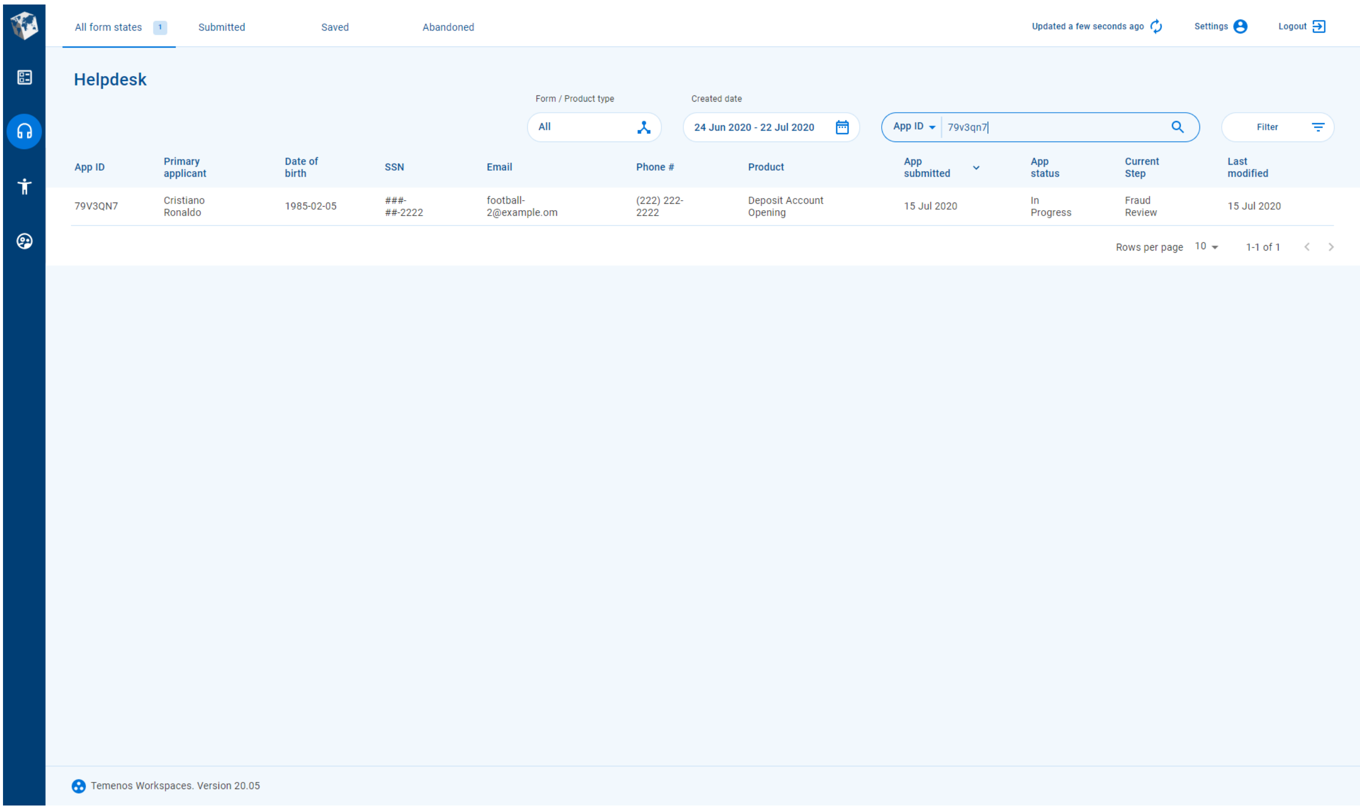
List Screen

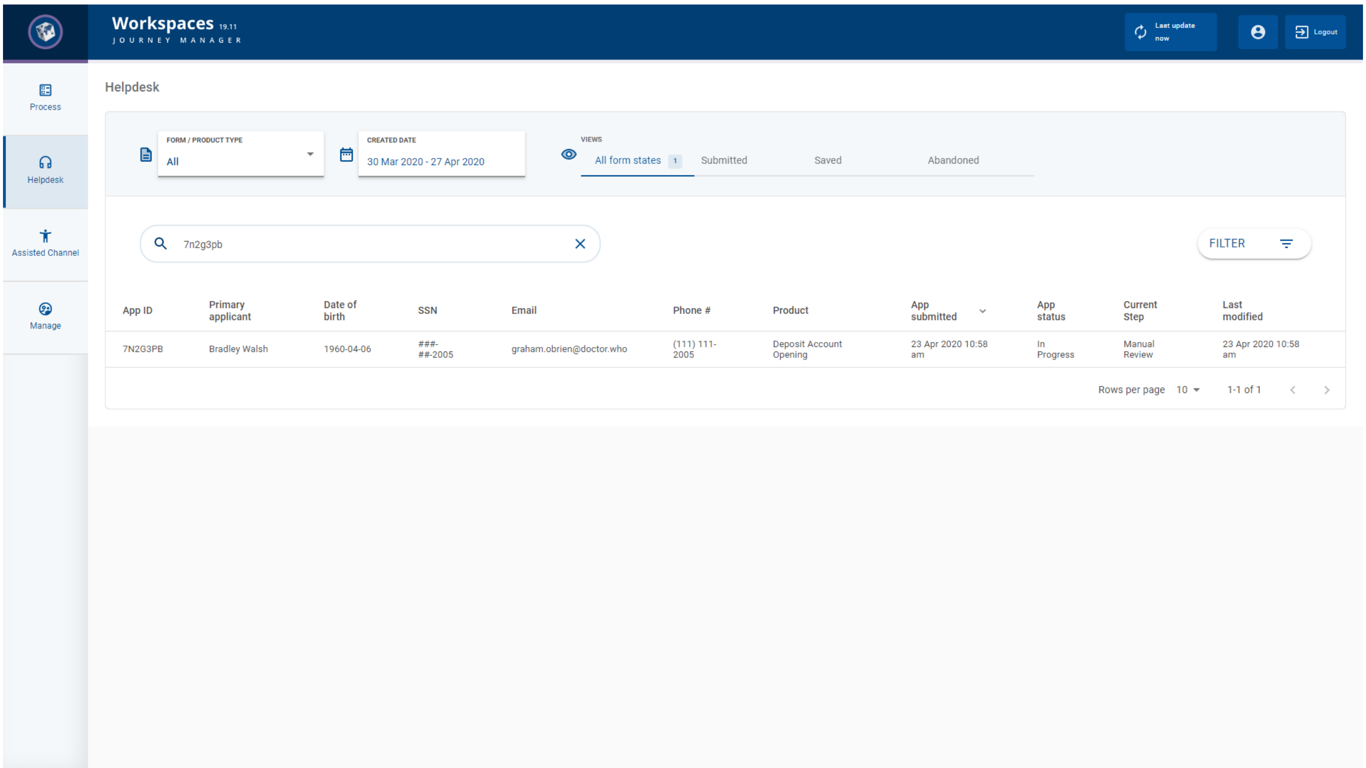
The List screen in the Helpdesk space includes all of the standard features of a Workspaces List screen.

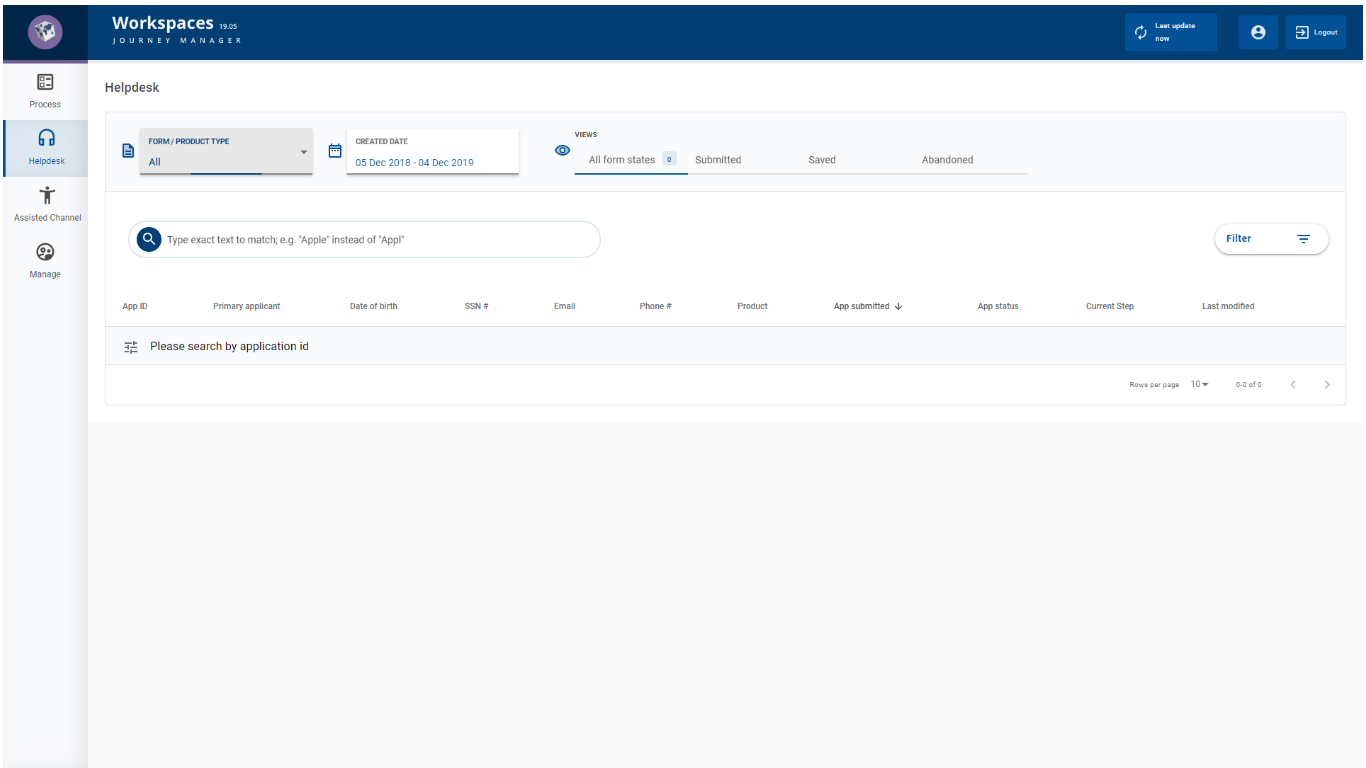
- An item list containing a list of applications, and which may be empty initially depending upon how it is populated.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- A global filter that restricts the applications in the item list to 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.

- Flexible search, filter and sort options that you can use to refine the set of applications in the item list.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- 20.05 and later
- 19.11
- 19.05







The item list on the Helpdesk space's List screen 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 Screen

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:

- An optional progress stepper showing a high-level indication of the selected application's progress. 22.10This feature was introduced in the 22.10 release
- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. 19.11This feature was introduced in the 19.11 release
- A set of standard actions that you can perform in the Helpdesk space at the current stage of the application's life cycle. 20.05This feature was introduced in the 20.05 release
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details. 19.11This feature was introduced in the 19.11 release
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability. 19.11This feature was introduced in the 19.11 release

  The other custom information, shown on additional tabs, includes:
  - Any other custom information that is not included in the standard cards, or that is presented differently.
- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release

- 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. 20.05This feature was introduced in the 20.05 release
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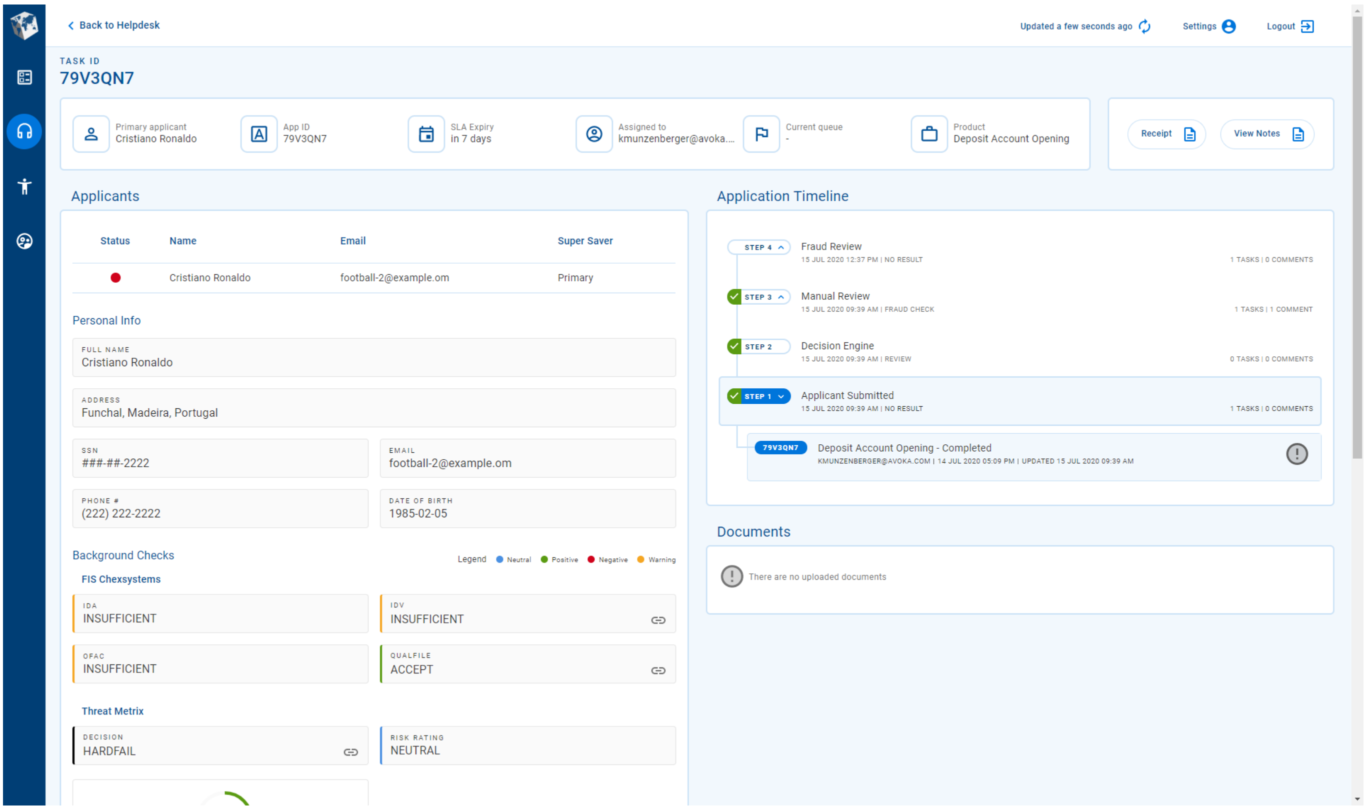
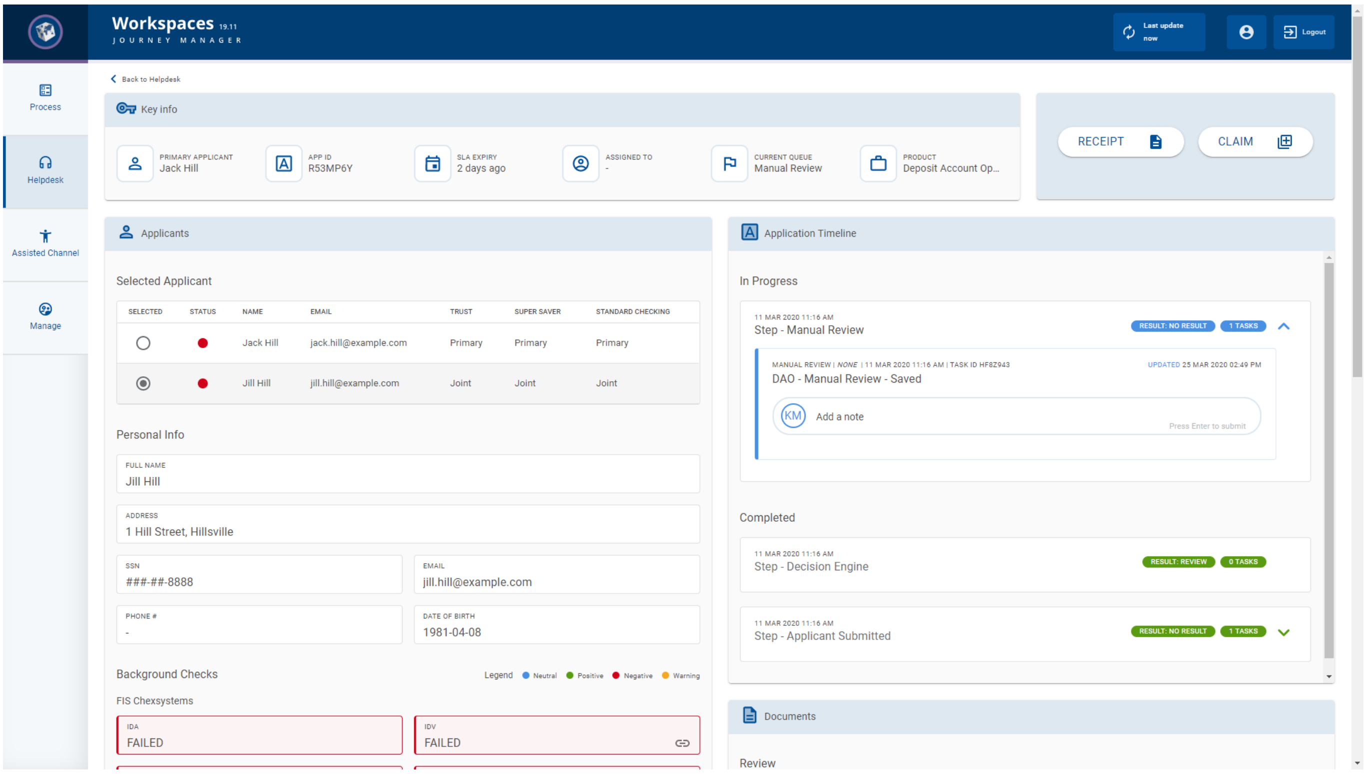
- v20.05
- v19.11 and earlier





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

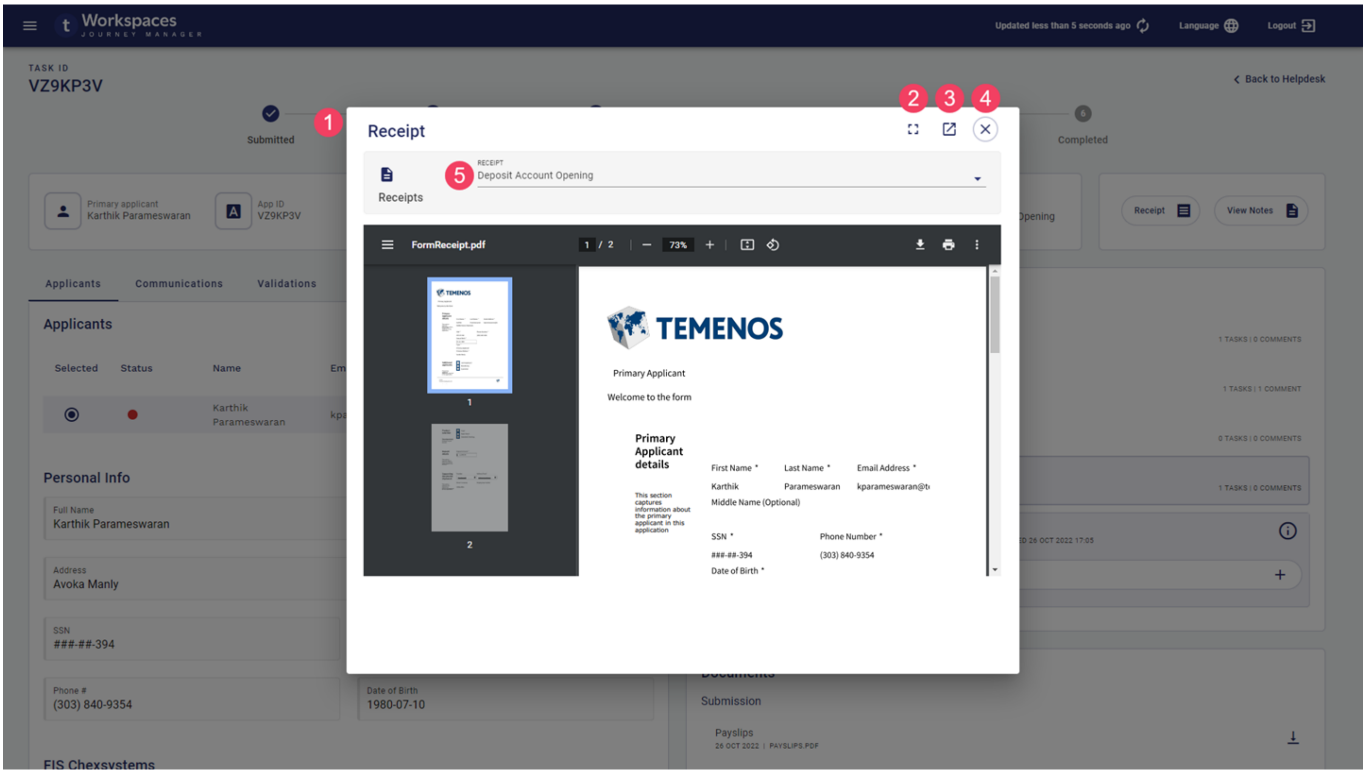
When you're working on a task or application, you often need to see the information that the applicant has submitted; for example, to inform the decision making process. You can use the

Receipt action to view the information for a submitted application.

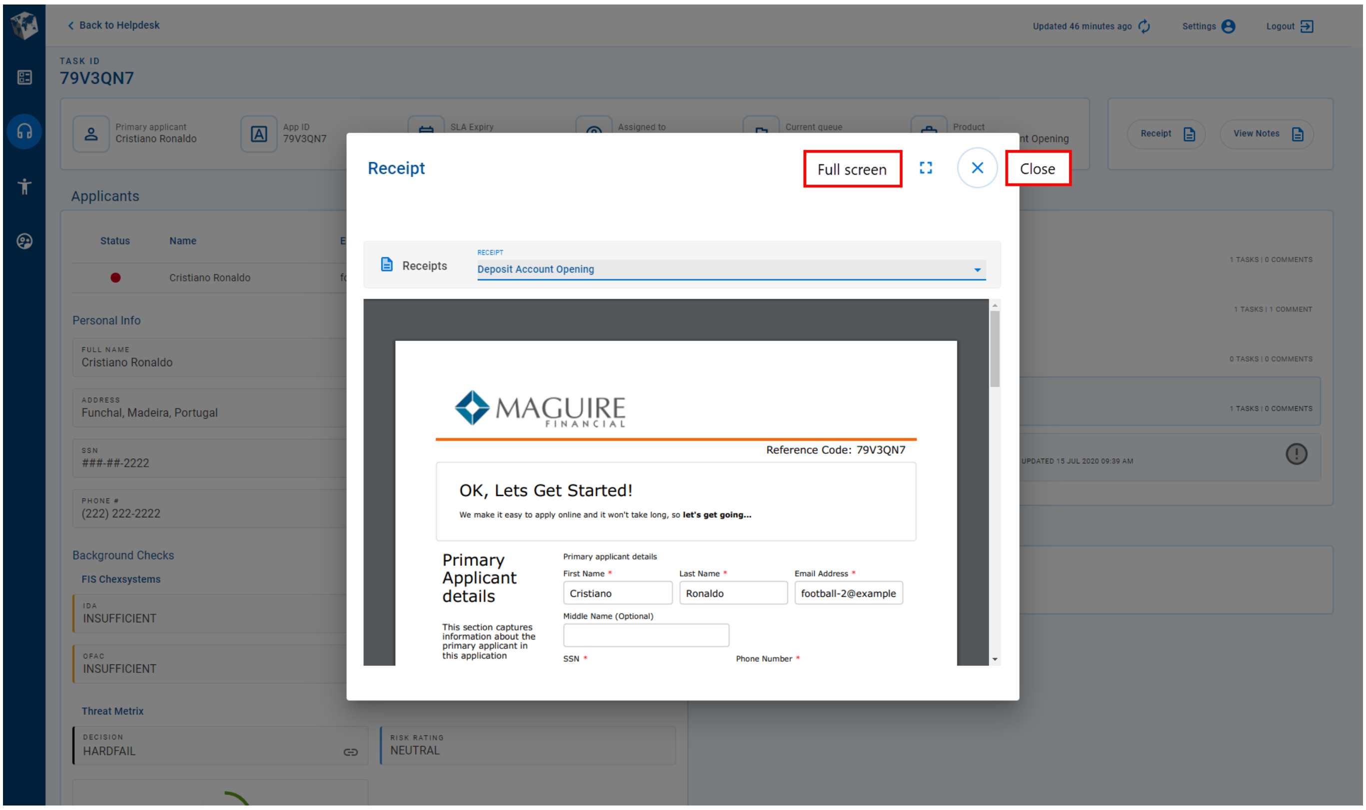
NOTE

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

- 22.10
- 22.04 and earlier



1. Modal window
2. Expand to full screen
3. Pop out to new tab
4. Close modal window
5. Receipt selector



A receipt is a read-only view of information submitted by an applicant or other Workspaces user, and displayed in the same form used to capture that information. You can view a receipt from any space, and for any item (application or task) even if it's not assigned to you. Each task associated with an application may have a receipt. If there are multiple receipts for an application, you can view a specific receipt using the Receipt selector at the top of the modal window. Note that viewing a receipt does not allow you to change the application in any way.

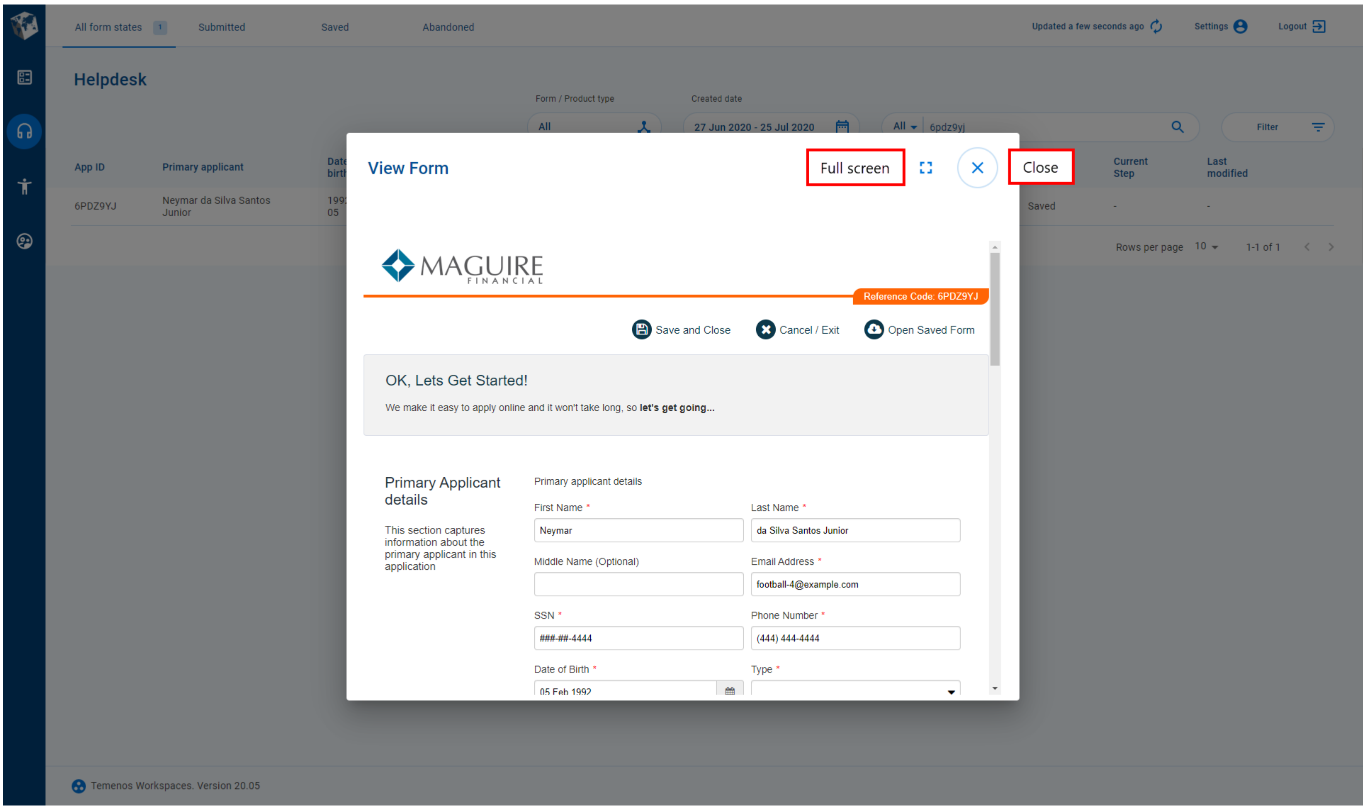
When you select the Receipt action, the receipt for the selected task is displayed unless there isn't a receipt associated with the task, in which case the most recent receipt is shown by default. However, if you're using Workspaces 22.04 or earlier, the most recent receipt is always displayed by default. | 22.10 This feature was updated in 22.10.

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.

NOTE

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

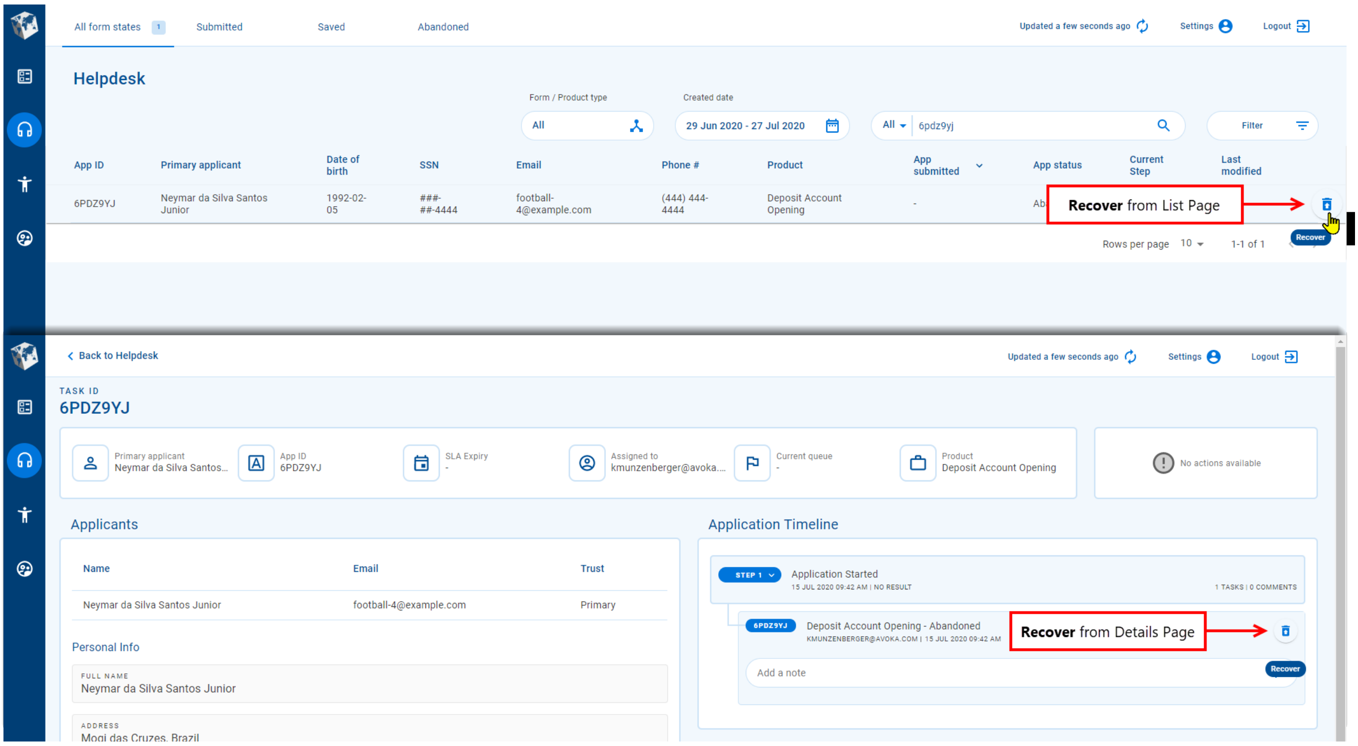
Let's say someone starts an application but their browser crashes before they can save or submit it. They give up on their application for now, and so it becomes . A short time later, the applicant decides to complete the application they started after all, so they call the support helpdesk. You're able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

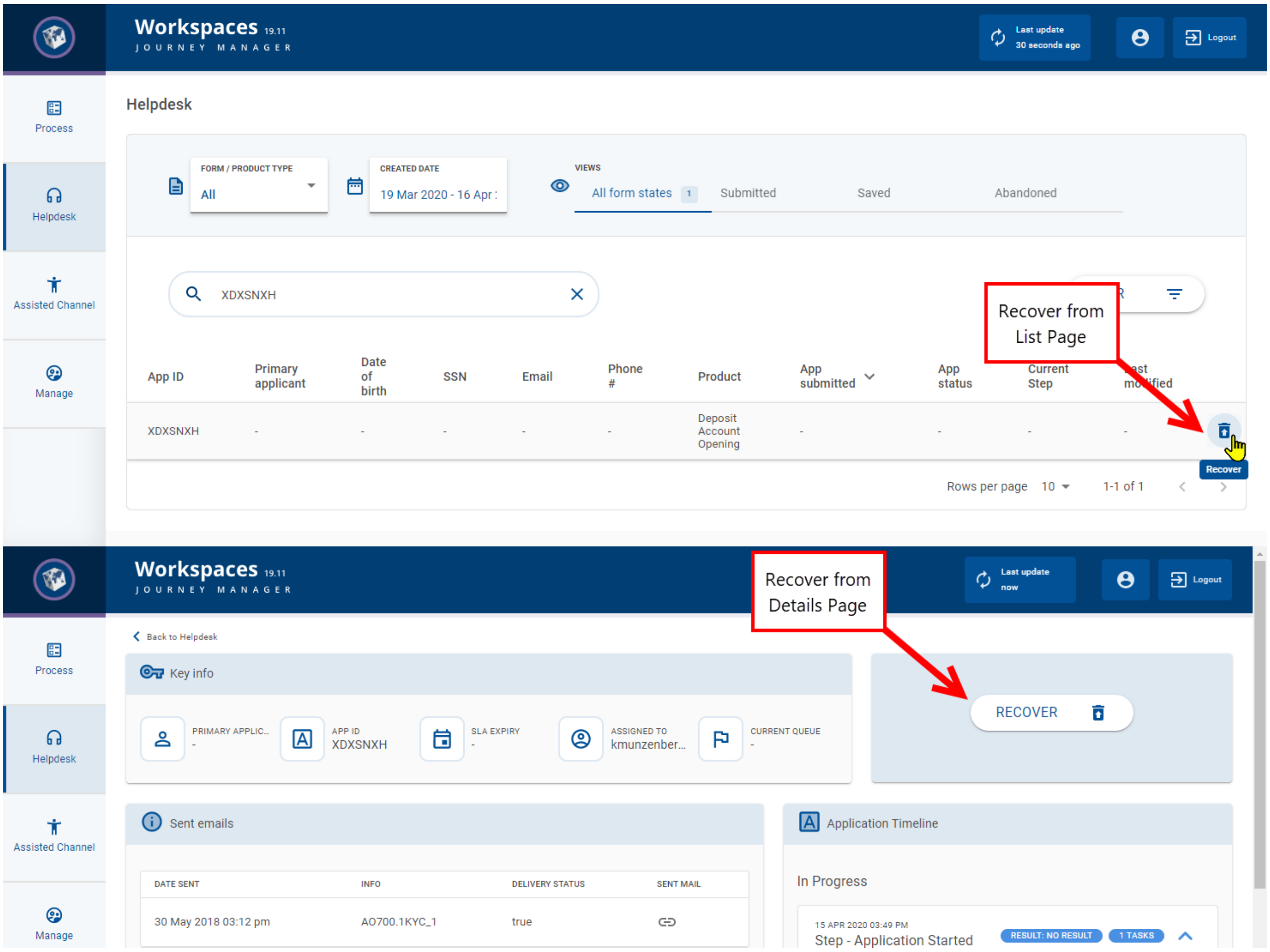
NOTE

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 screen, you can view its Details screen 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 screen whether you've got the right application.

- v20.05
- v19.11 and earlier





HOW DOES AN APPLICANT ACCESS A RECOVERED APPLICATION?

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.

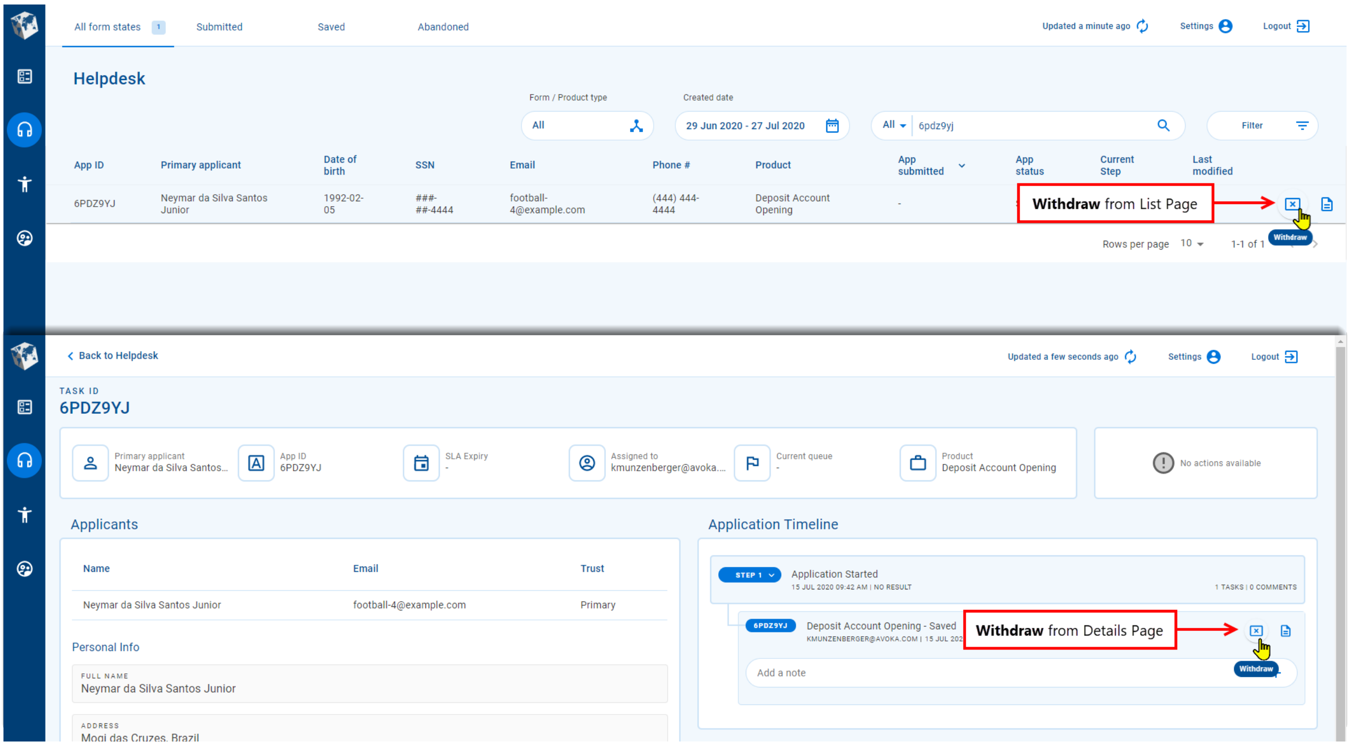
In addition to abandoned applications, an application that has been withdrawn can also be recovered.

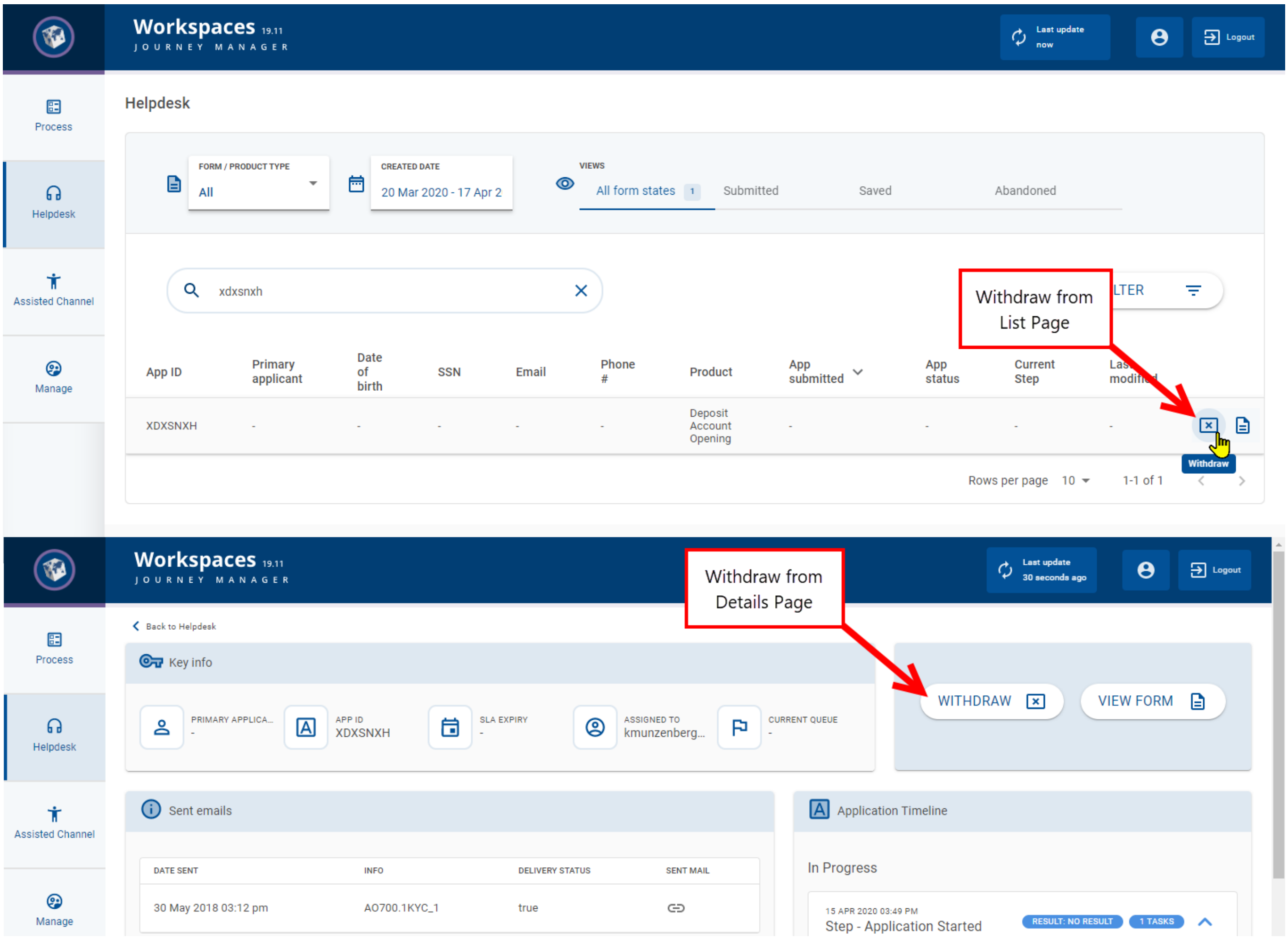
Withdraw an Application

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.

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.

There are examples for the following actions below.

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

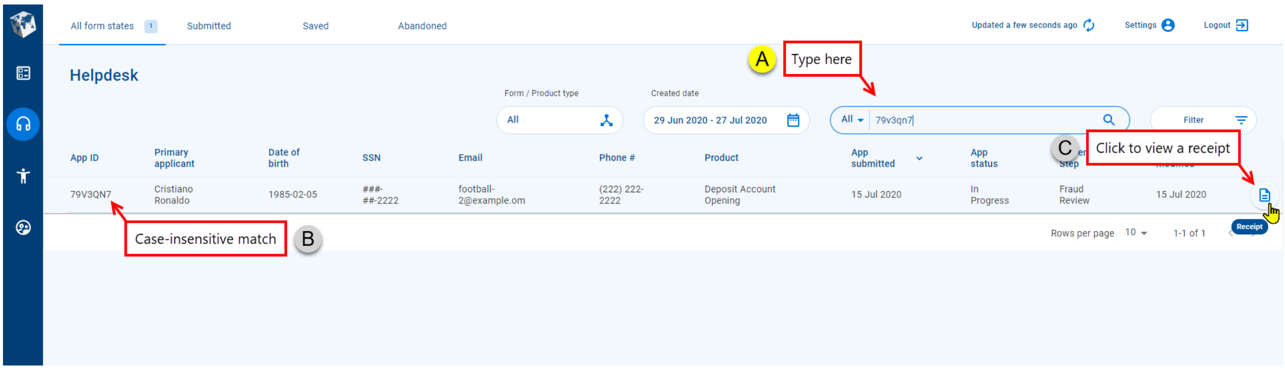
Step-by-step examples are also available for other actions that you may find useful while responding to applicant inquiries.

- [View all notes]() for an application on the Details screen
- [Upload a document]() on the Details screen

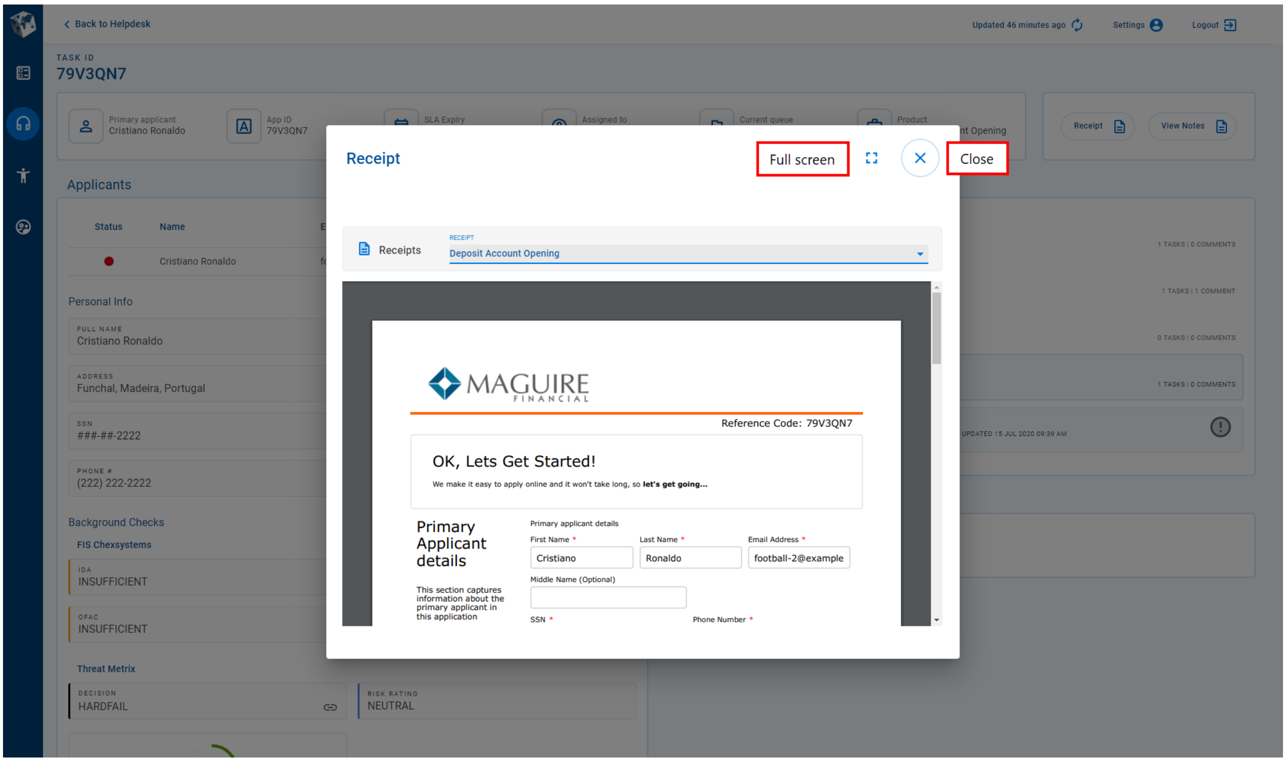
View a Receipt

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

1. Login to Workspaces and select the Helpdesk space. The List screen 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 screen. 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.

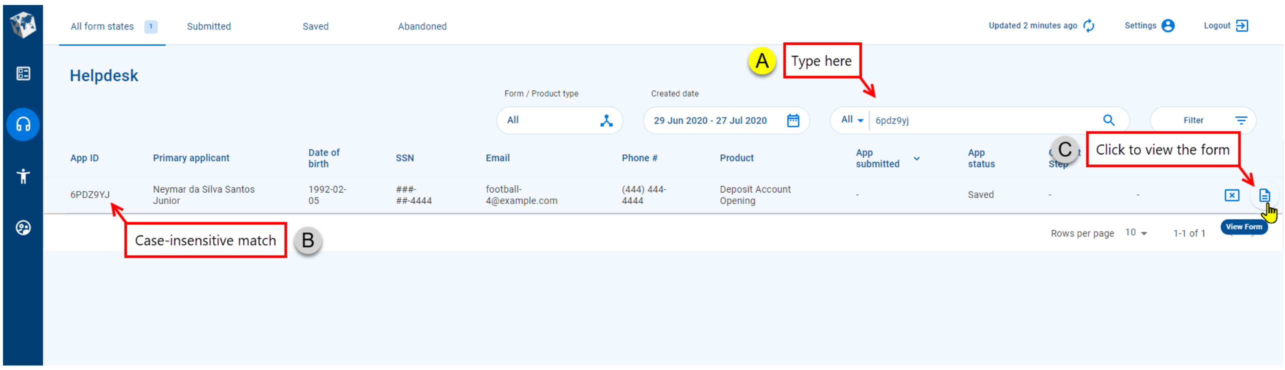


4. When you're finished viewing the receipt, click ✕ (Close) in the top-right corner to close the Receipt window and return to the Details screen.

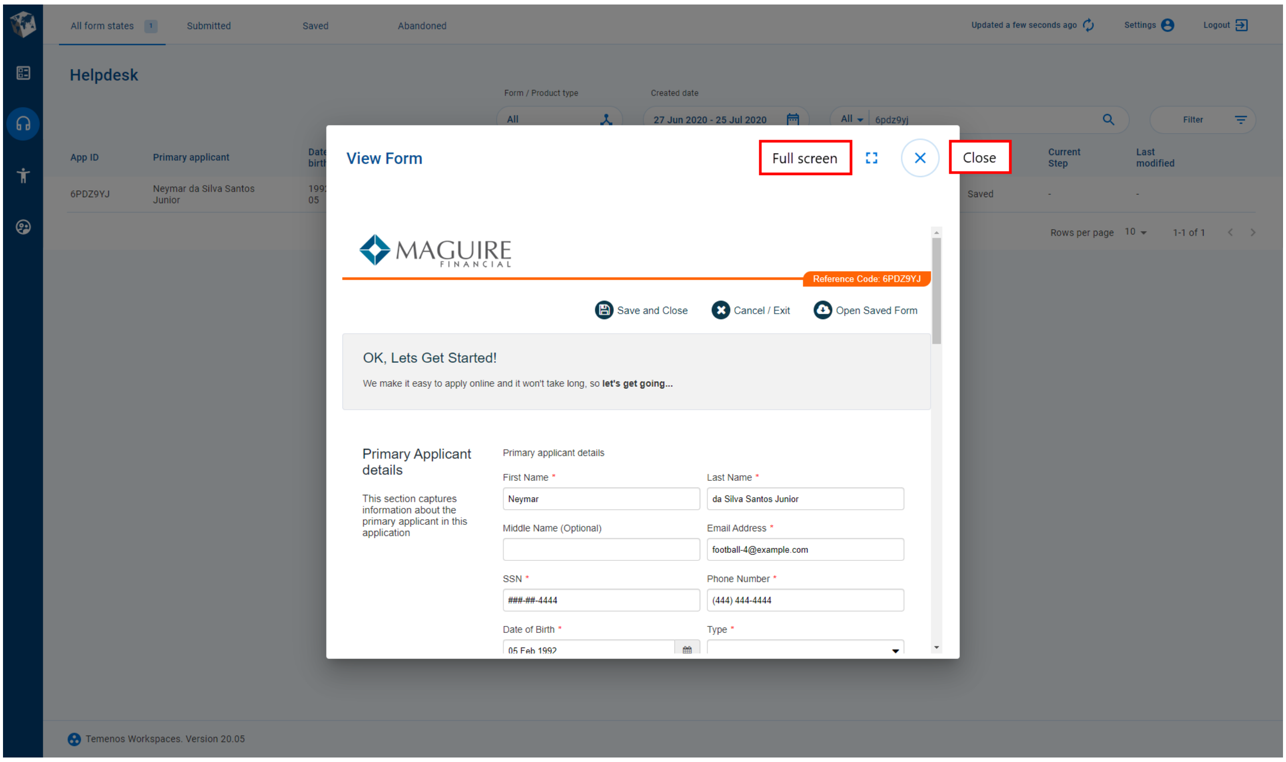
View a Form

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.

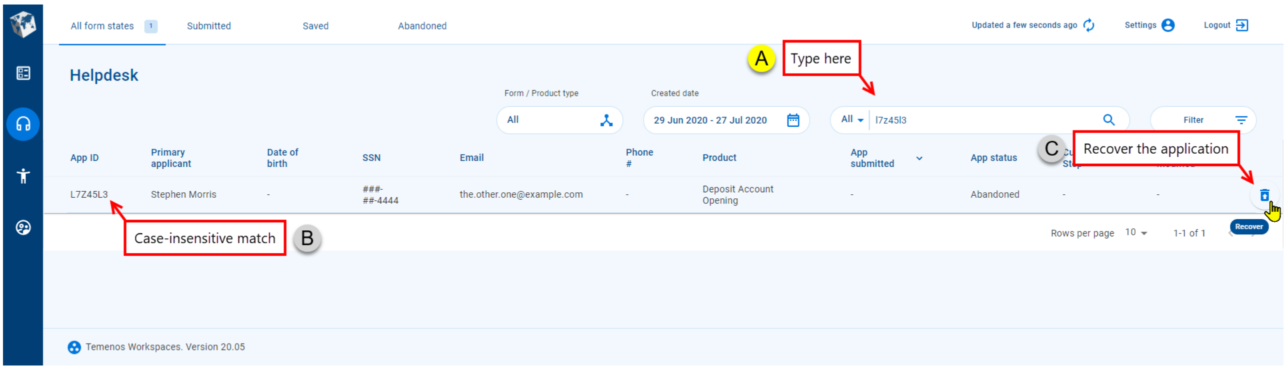


5. Update the form, adding or modifying details as appropriate, then click Save and Close on the form to save your changes.
6. When you're finished updating the form, click (Close) in the top-right corner to close the View Form window and return to the List screen.

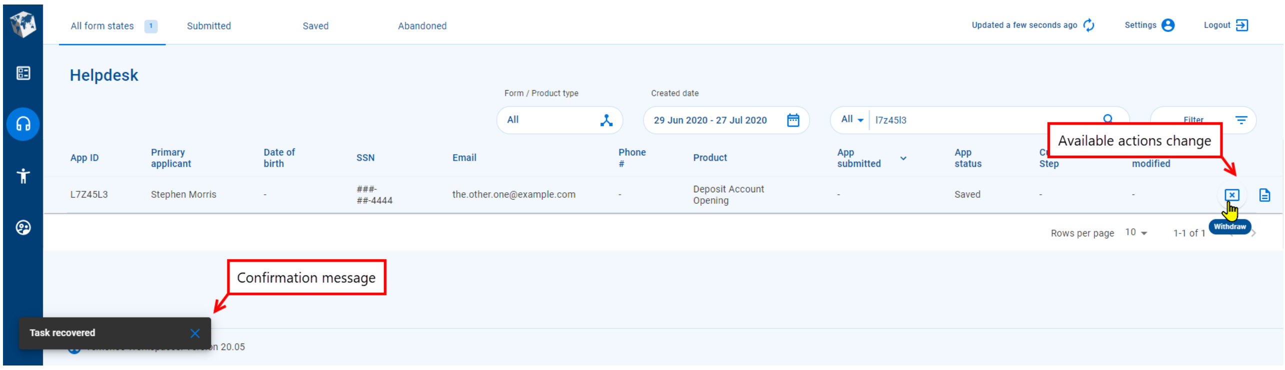
Recover an Abandoned Application

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

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.

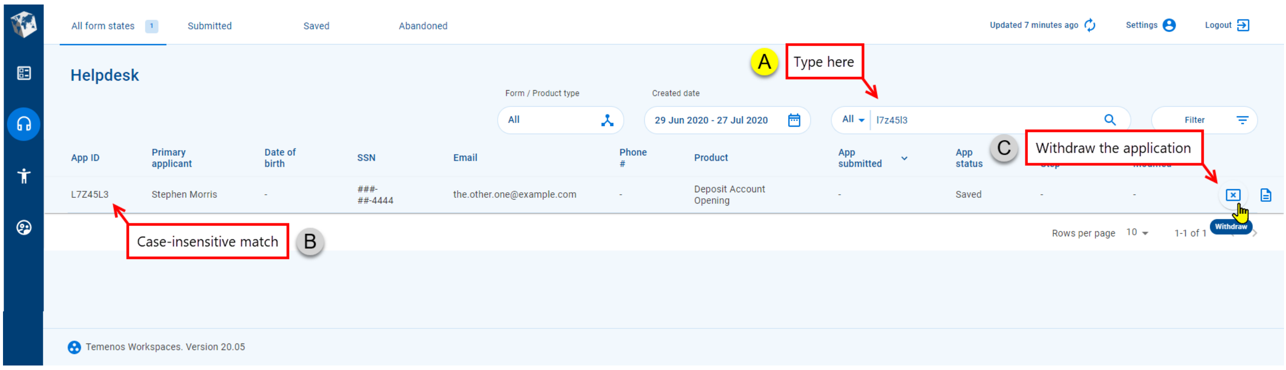


The application is now available for the applicant to continue. How the applicant accesses the recovered application will depend on how your Workspaces portal is configured. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their application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

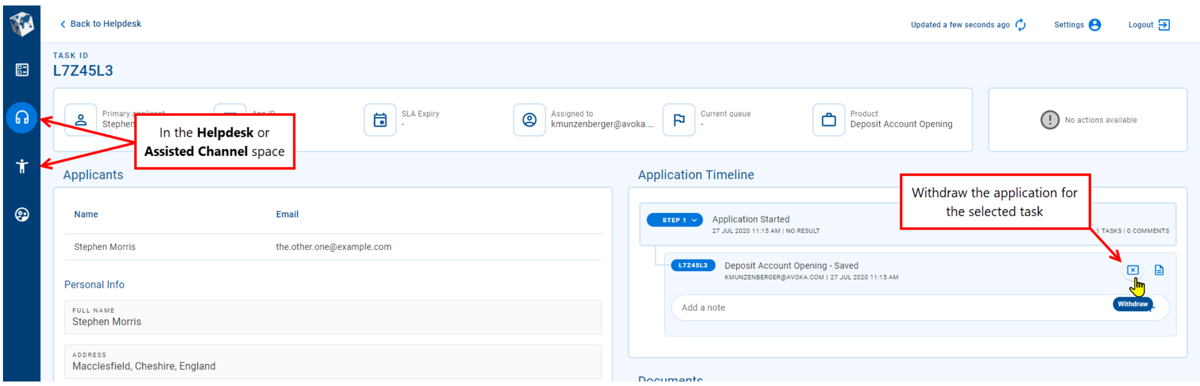
Withdraw an Unsubmitted Application

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 screen.

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.

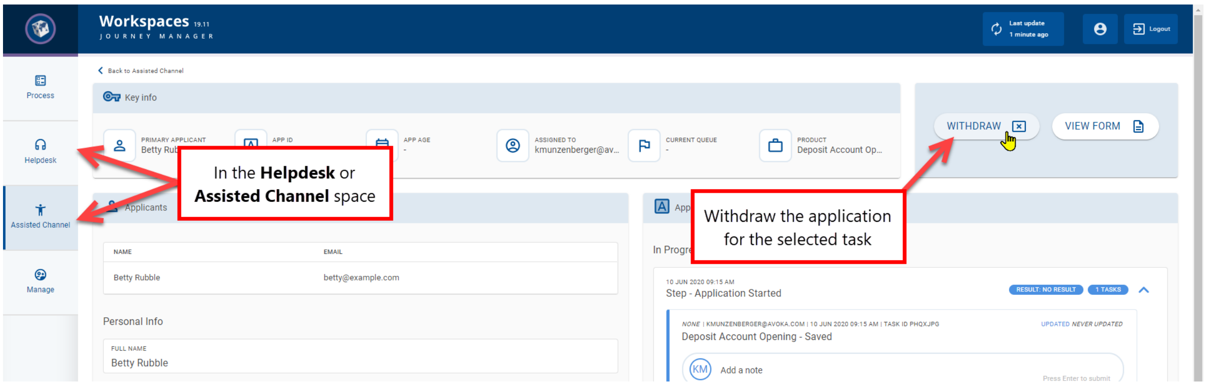


3. If you point your cursor at the item you found, the available actions appear at the right-hand side of the item list.The (Withdraw) action is available here because even though the application has not been submitted yet, it has been saved (either intentionally by the applicant or in the background by the form). While you could withdraw the application here, click the application item instead to display its details.
4. On the Details screen, 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 20.05:** Click (Withdraw) for the selected task in the Application Timeline.

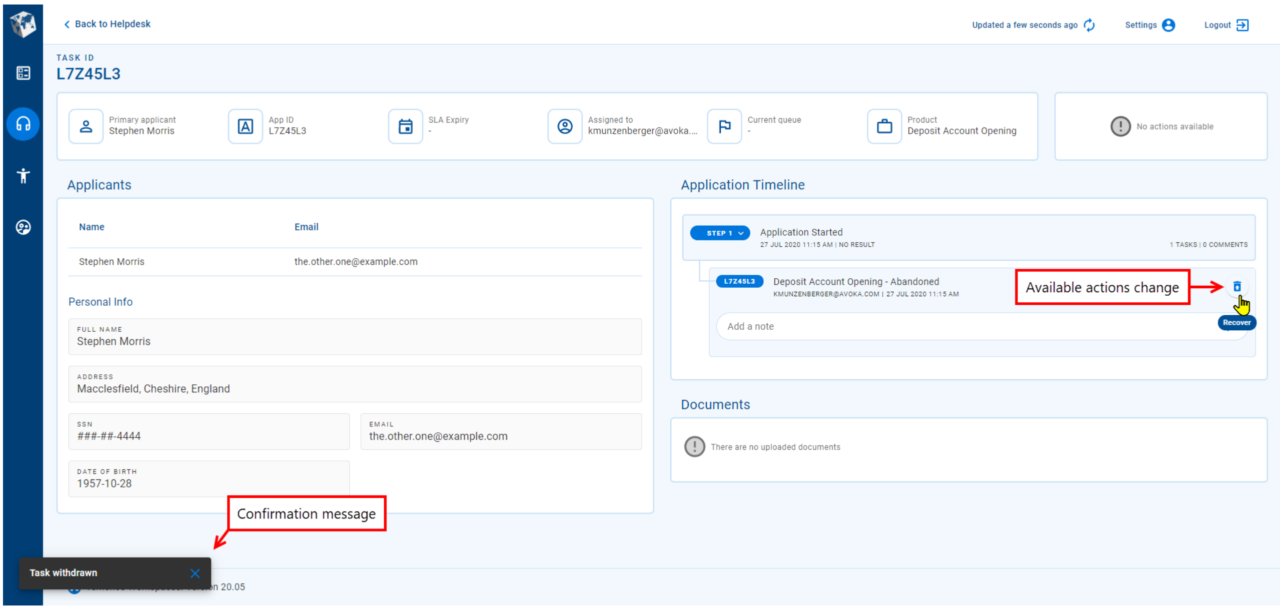


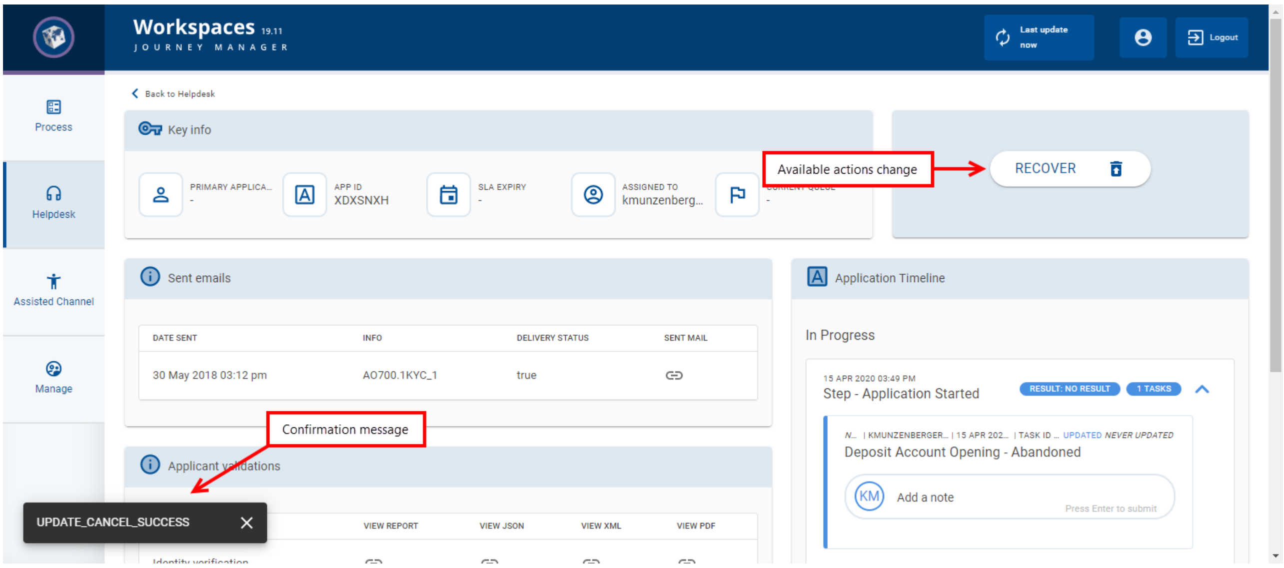
Note that the Withdraw action is only available for the first task of an application that has been saved but not yet submitted.

- **Workspaces 19.11 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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 19.05This topic was introduced with the 19.05 release

NOTE

Some of the text and images below may not match what you see in your Workspaces portal. This is because the features described are based on a default Workspaces portal configuration, and your Workspaces portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Workspaces portal.

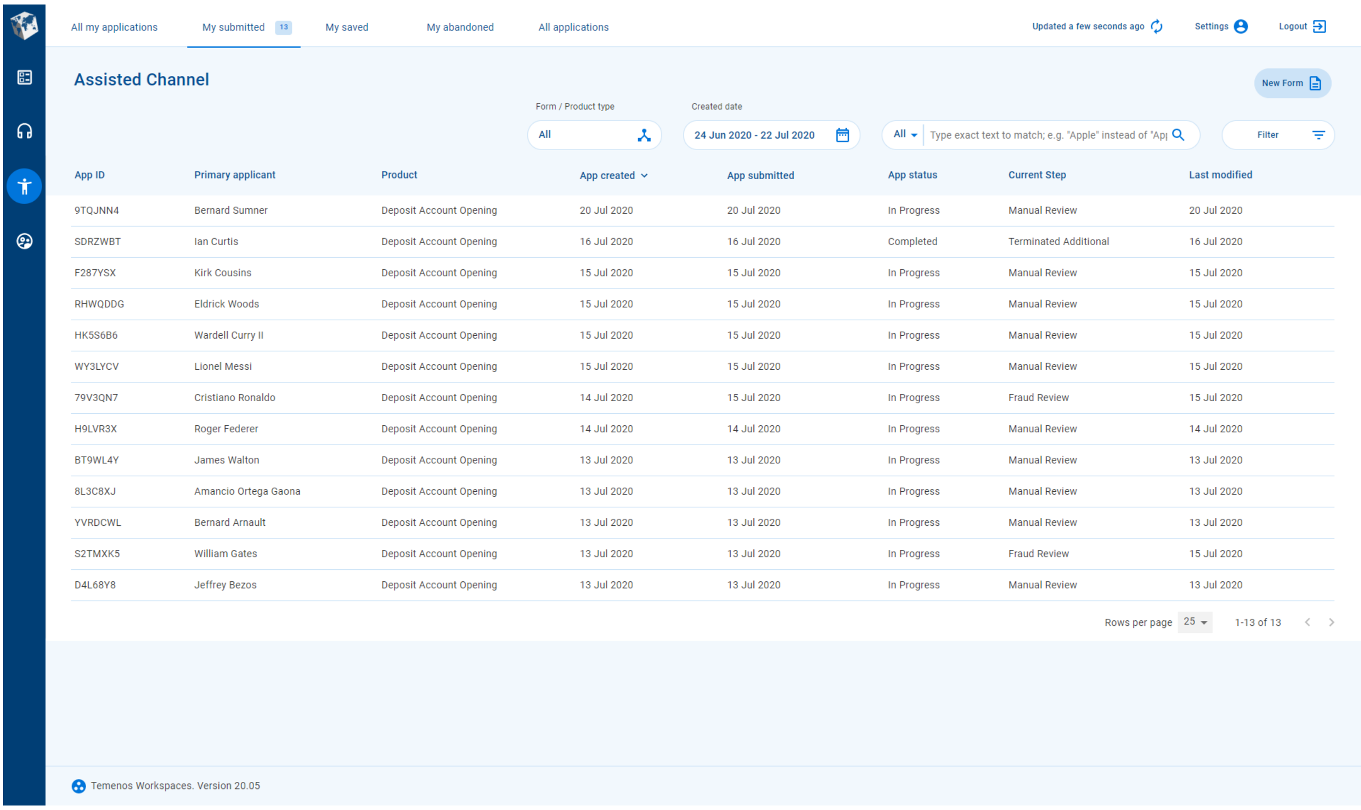
Customer service needs, such as for relationship management, are supported in Workspaces via the inclusion of an Assisted Channel space. In its default configuration, the Assisted Channel space includes a List screen and a Details screen that are configured with features designed to make relationship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

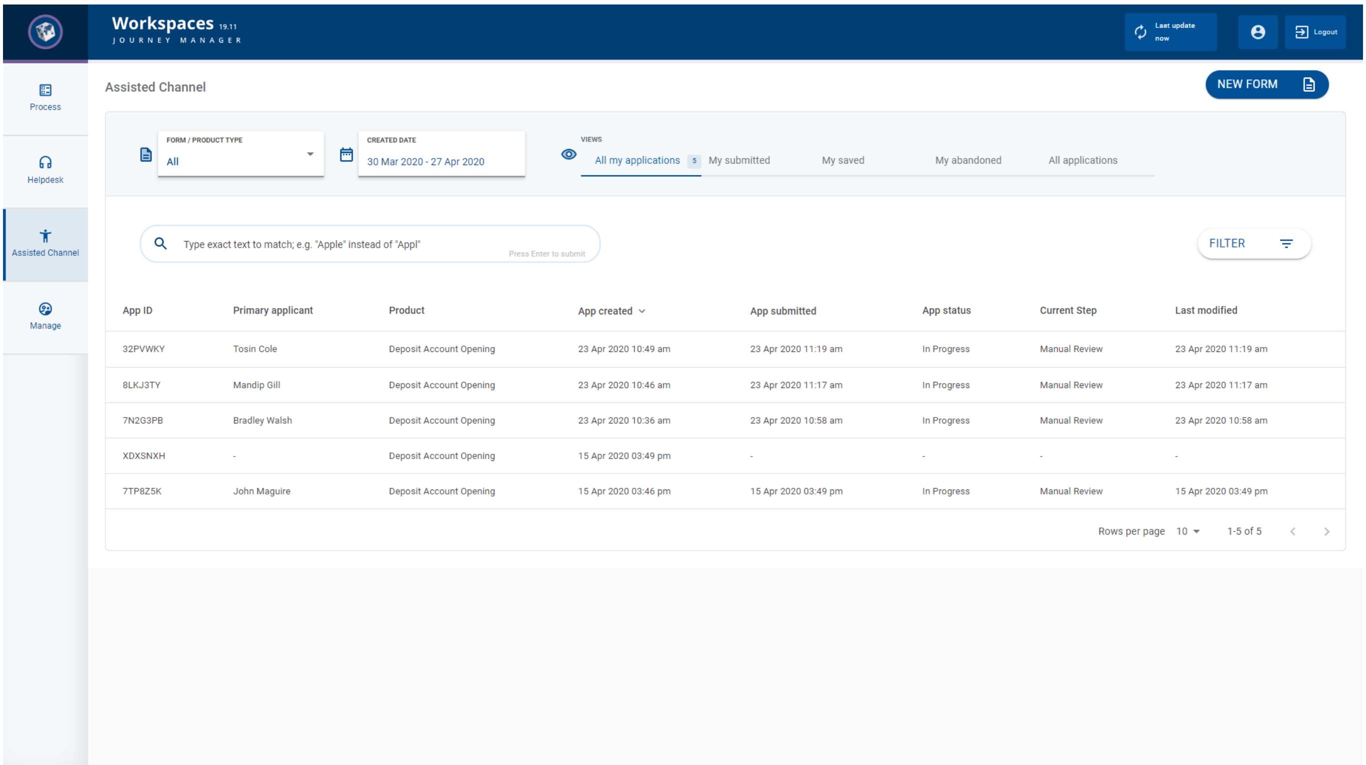
List Screen

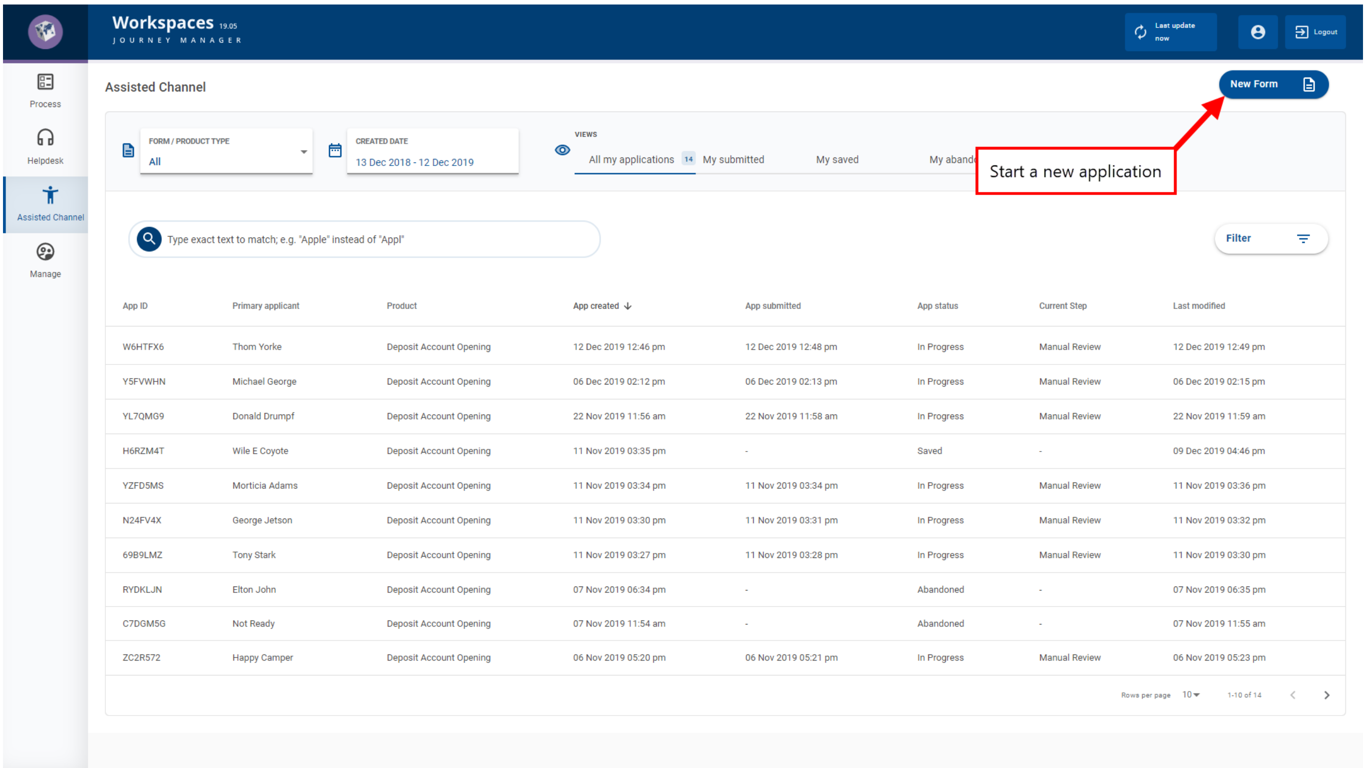
The List screen in the Assisted Channel space includes all of the standard features of a Workspaces List screen.

- An item list containing a list of applications, and which may be empty initially depending upon how it is populated.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- 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.
- Flexible search, filter and sort options that you can use to refine the set of applications in the item list.
- A Bulk Action mode switch to change between acting on a single task or multiple tasks. | 22.10 This feature was introduced in 22.10.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- [20.05 and later]
- [19.11]
- [19.05]







The Assisted Channel space's List screen 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 Screen

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:

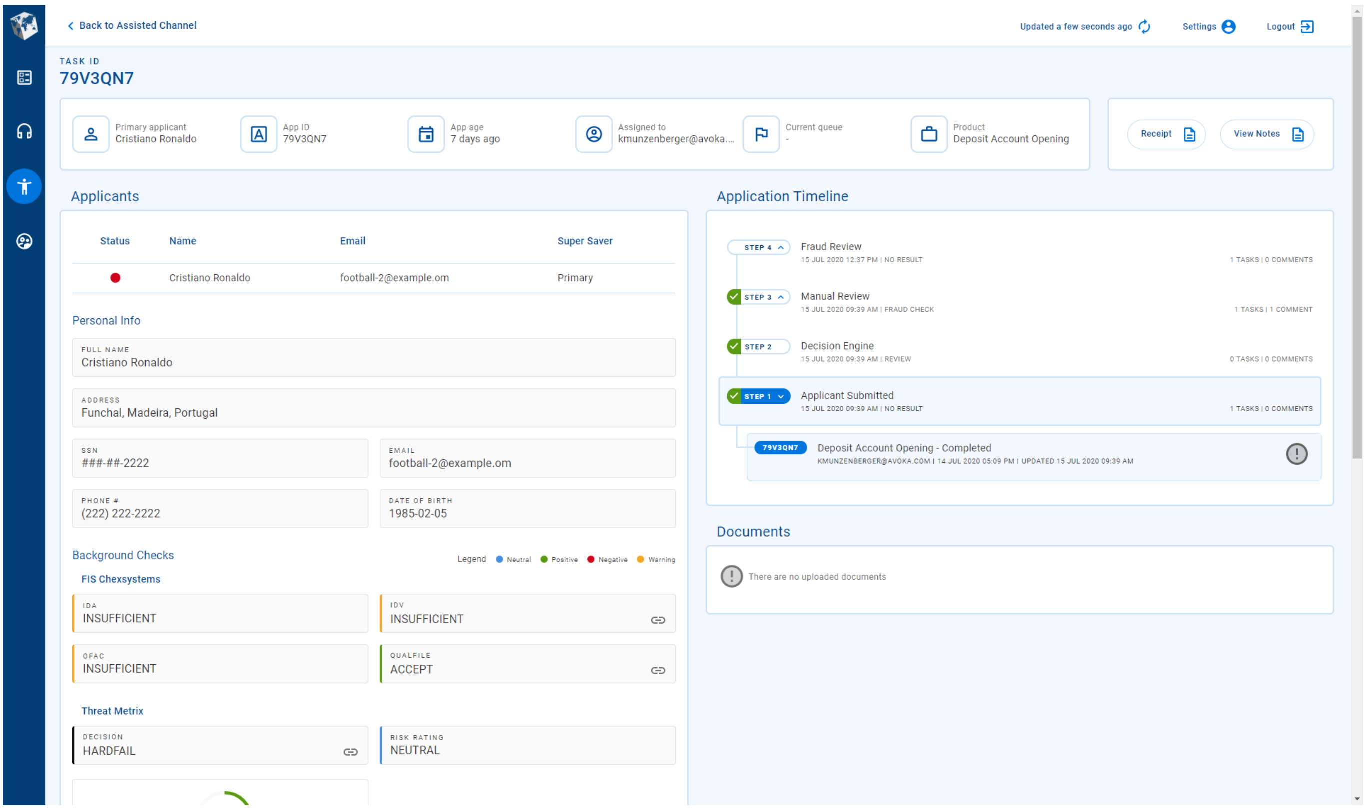
- An optional progress stepper showing a high-level indication of the selected application's progress. 22.10This feature was introduced in the 22.10 release
- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. 19.11This feature was introduced in the 19.11 release
- A set of standard actions that you can perform in the Assisted Channel space at the current stage of the application's life cycle. 20.05This feature was introduced in the 20.05 release
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release

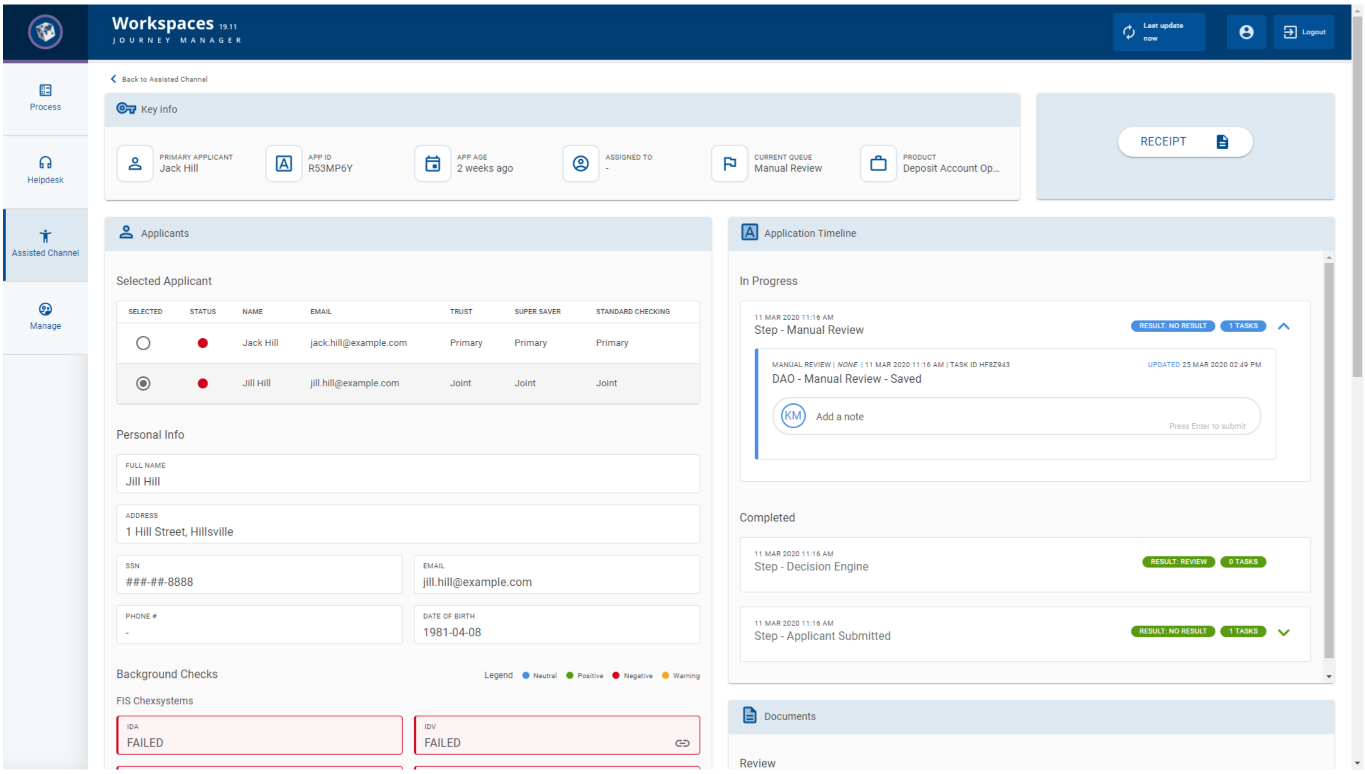
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details. 19.11This feature was introduced in the 19.11 release
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability. 19.11This feature was introduced in the 19.11 release

  The other custom information, shown on additional tabs, includes:
  - Any other custom information that is not included in the standard cards, or that is presented differently.
- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release
- 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. 20.05This feature was introduced in the 20.05 release
- Attached documents relating to the application. 19.11This feature was introduced in the 19.11 release | 22.10This feature was updated in the 22.10 release

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

- v20.05
- v19.11 and earlier





Actions

The assisted channel actions are:

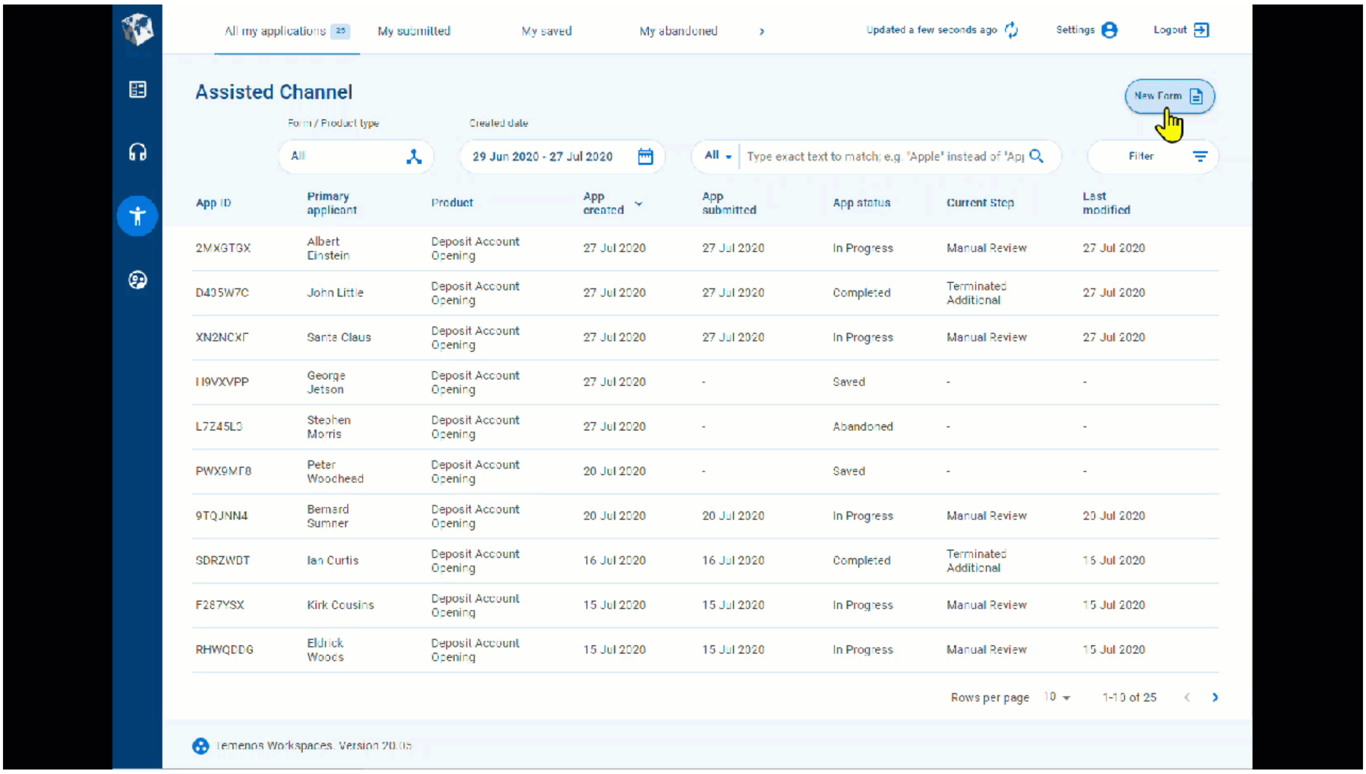
- **New Form**: Start a new application on behalf of someone else.
- **Recover**: Recover an abandoned or withdrawn application so that the applicant can continue with it.
- **View Form**: See a read-only view of an application that has been saved but not yet submitted.
- **View Notes**: View all of 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 in the context of the Helpdesk space.

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.

NOTE

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 Applicants space) or a Temenos Journey Manager 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 Temenos Journey Manager solution. So, if application handover is important to you, contact your Temenos Journey Manager 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 screen. 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.

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.

There are examples for the following actions below.

- Start an application on the List screen

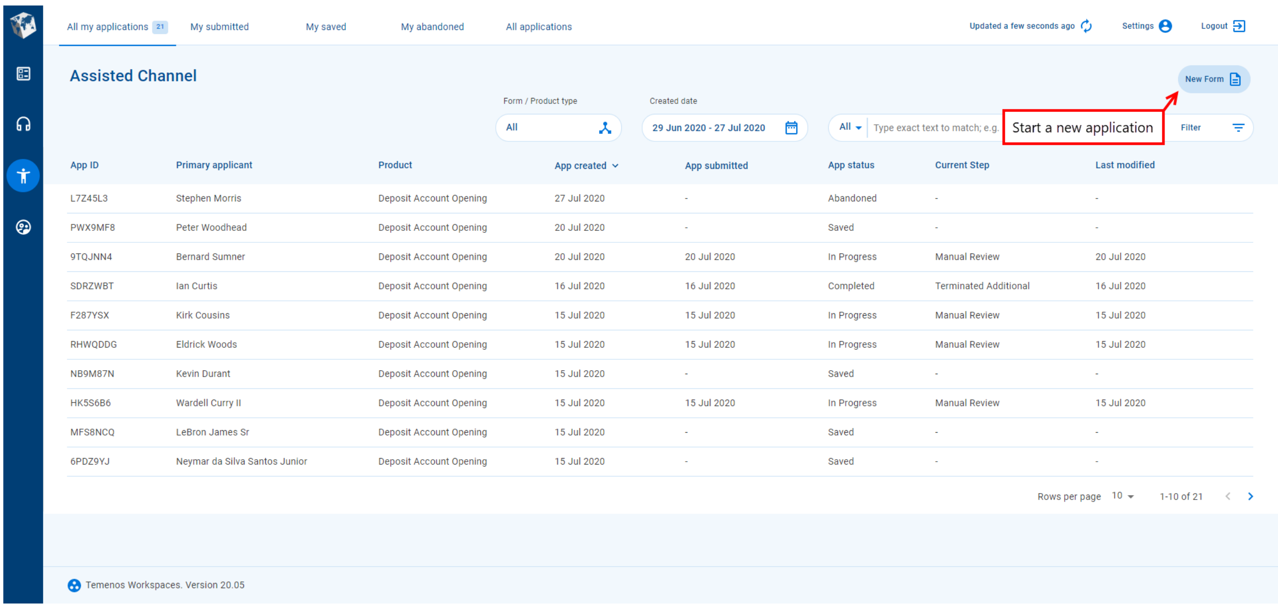
Step-by-step examples are also available for other actions that you may find useful while assisting customers with applications.

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen
- View a saved application form on the (Helpdesk) List screen
- Upload a document on the Details screen
- Recover an abandoned application on the (Helpdesk) List screen
- Withdraw an unsubmitted application on the Details screen

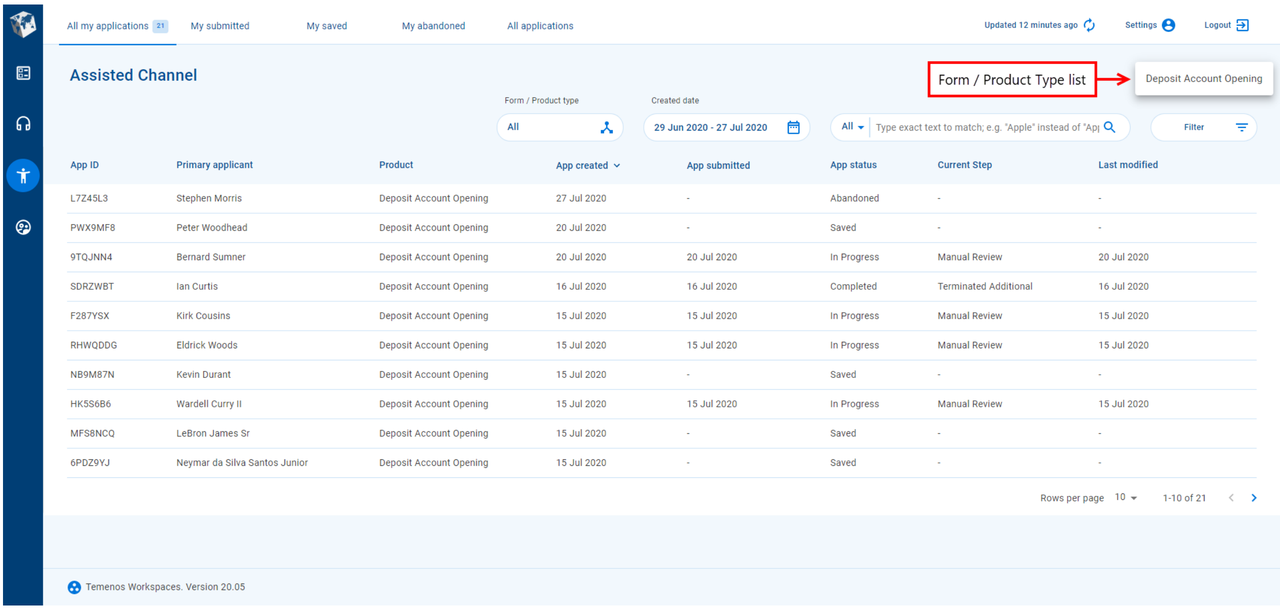
Start an Application

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

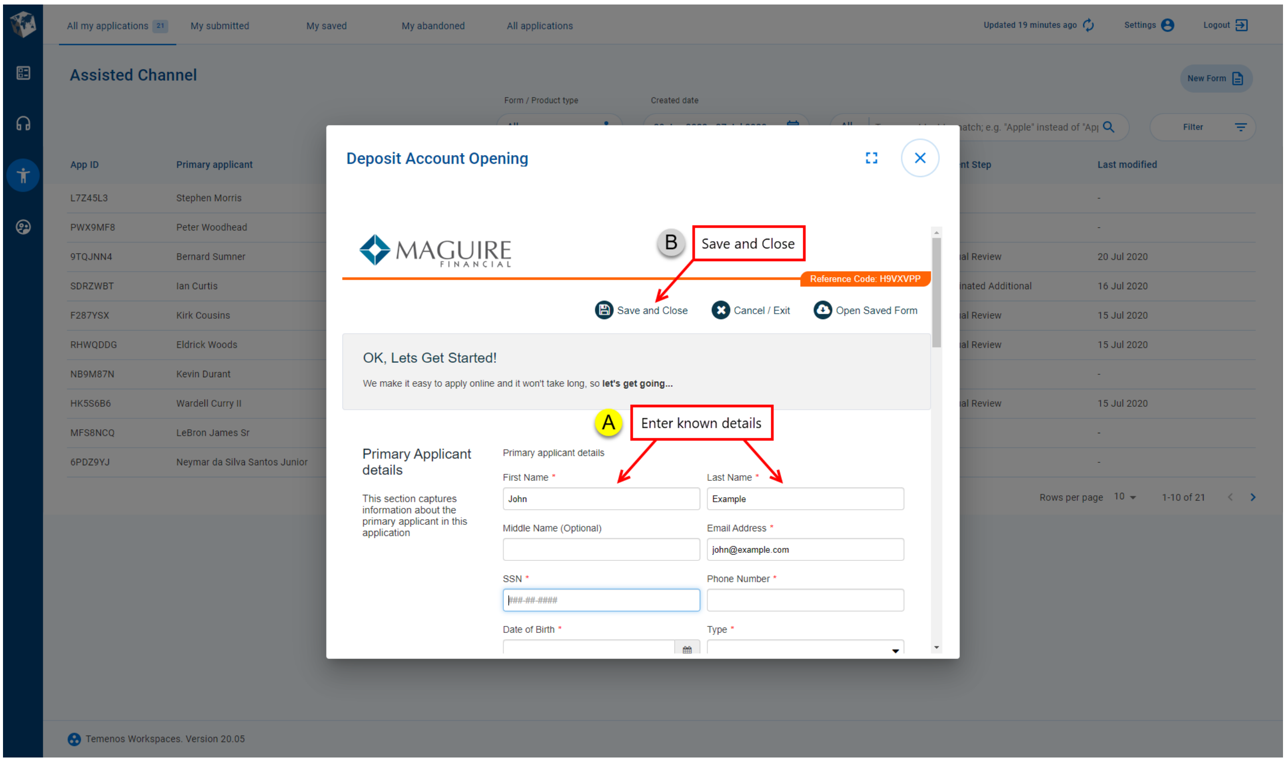
1. Login to Workspaces and select the Assisted Channel space. The List screen is displayed.



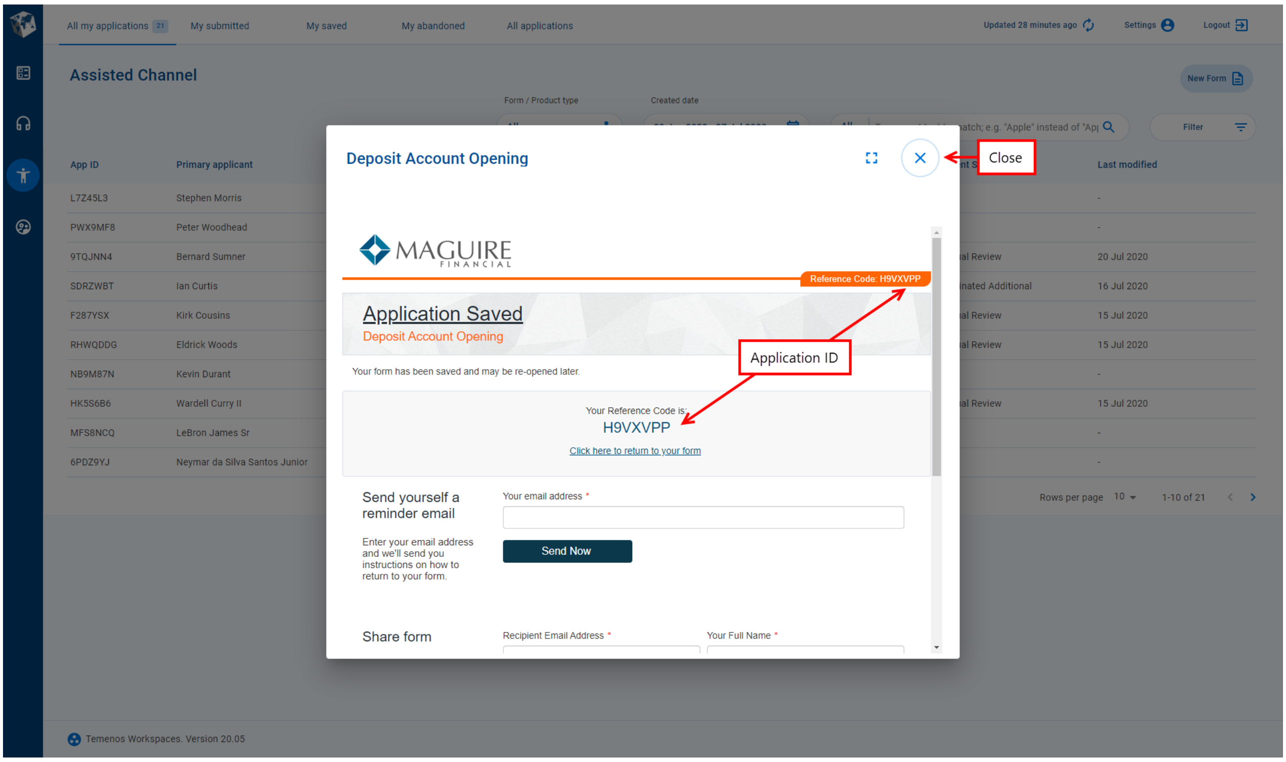
2. Click New Form, then select an item from the form / product type list. In this example, there's only a single form / product type, Deposit Account Opening, so we'll select this item.



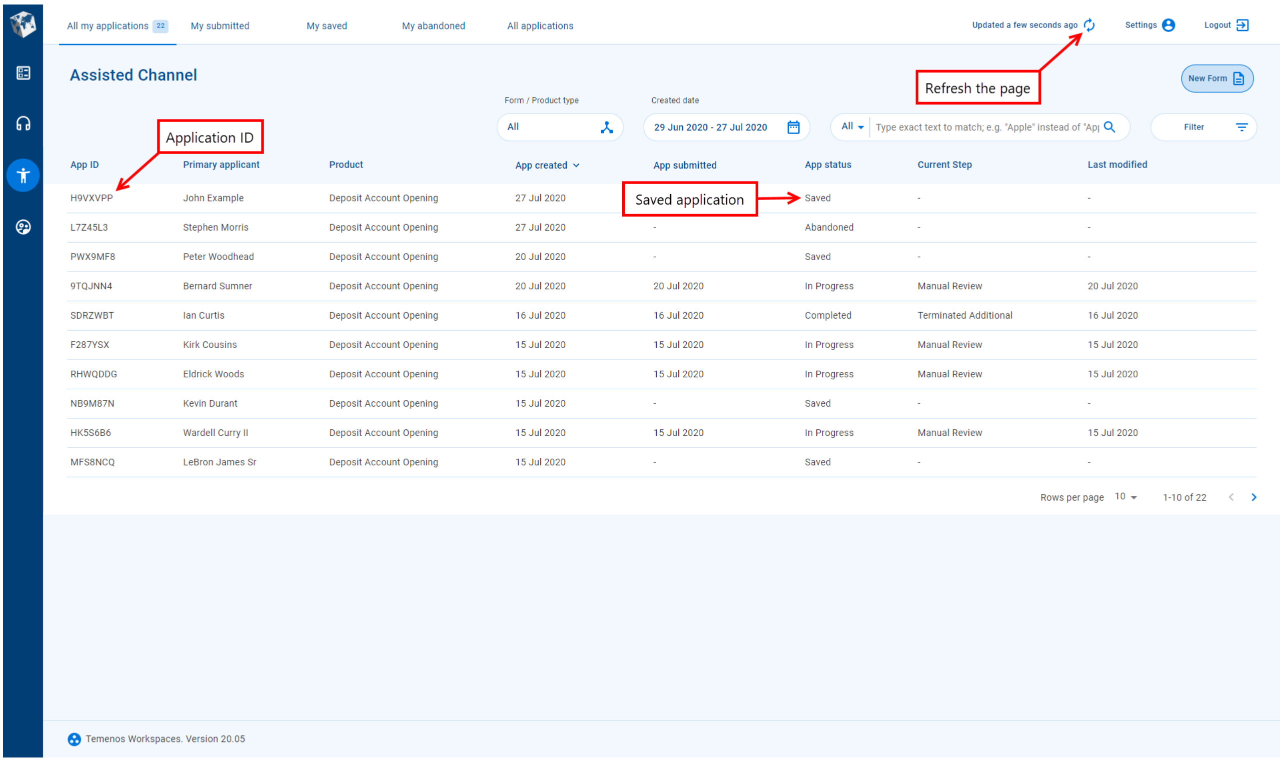
3. A window opens containing the new form. Enter the known customer details, name and email address, then click Save and Close.



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



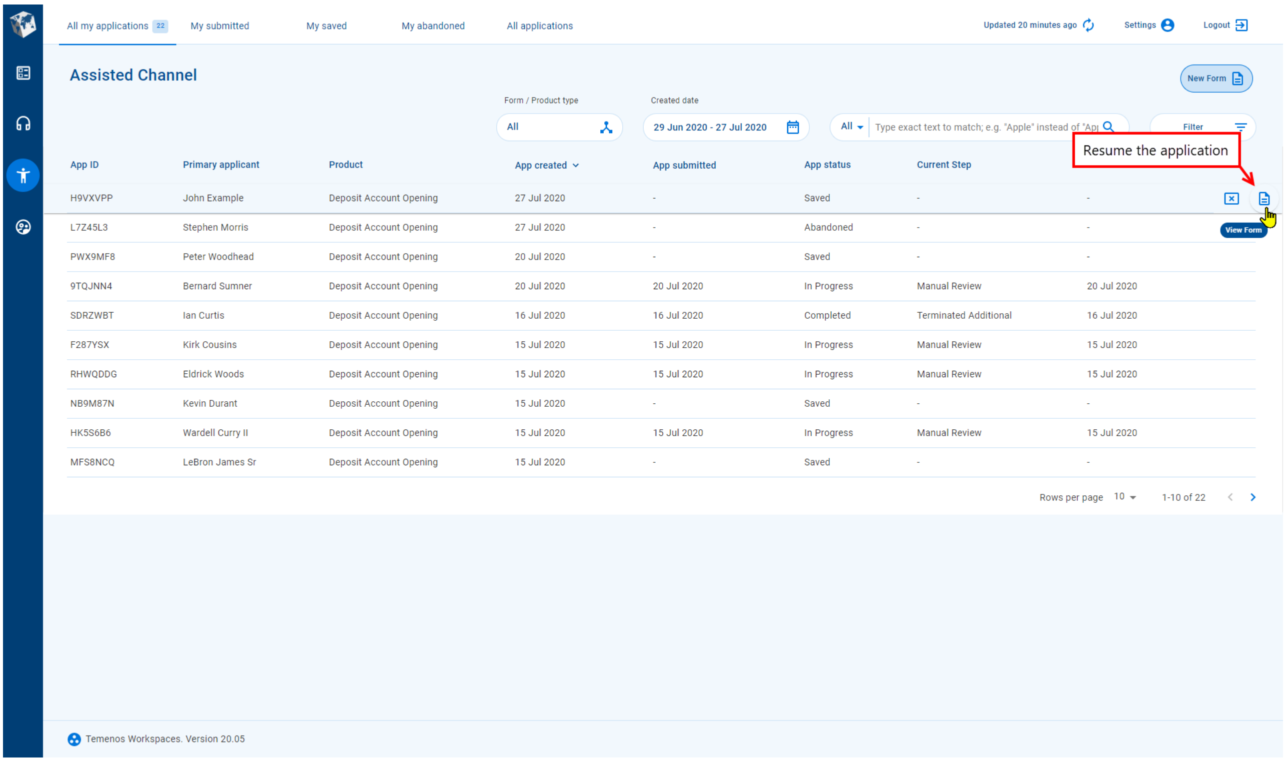
5. The new application, with application ID "PFFP7NZ", appears at the top of the list, and its status is Saved. If you can't see the new application, click (Refresh) to refresh the information shown on the page.



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

WorkspacesThis topic relates to Journey Workspaces | Workspaces UserIncludes bank staff, helpdesk, relationship managers, and managers | 19.05This topic was introduced with the 19.05 release | 22.10This topic was updated for the 22.10 release

NOTE

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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 Screen

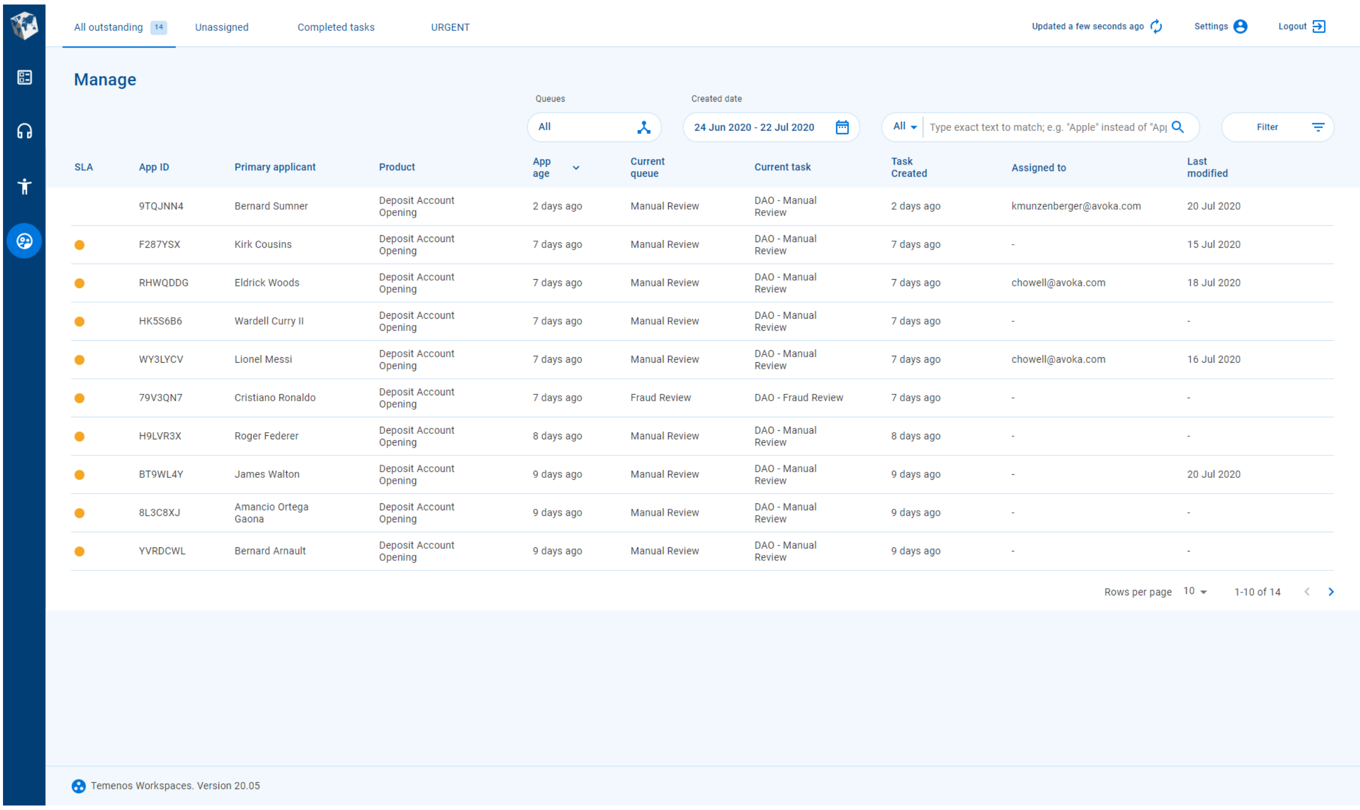
The List screen in the Manage space includes all of the standard features of a Workspaces List screen.

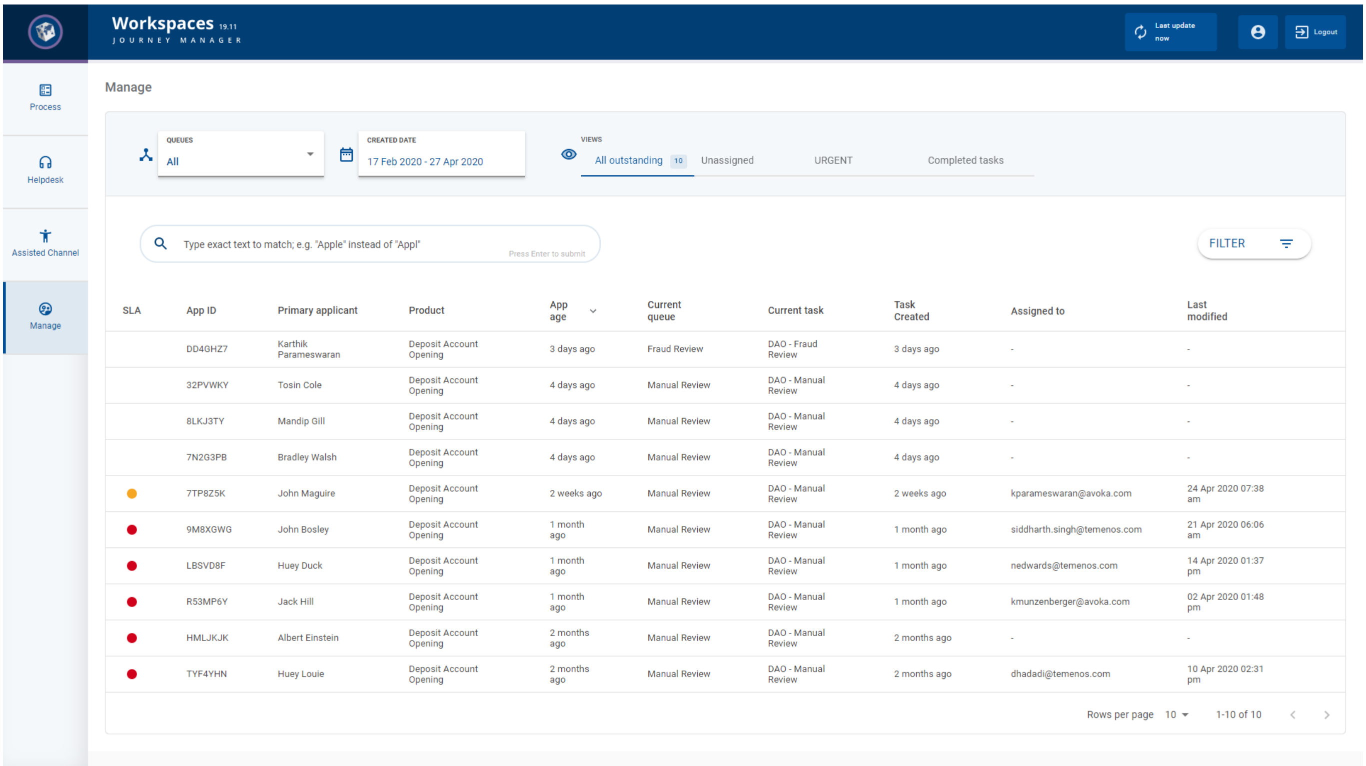
- An item list populated with tasks sourced from the active queue.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. | 19.11 This feature was introduced in 19.11.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- 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.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.

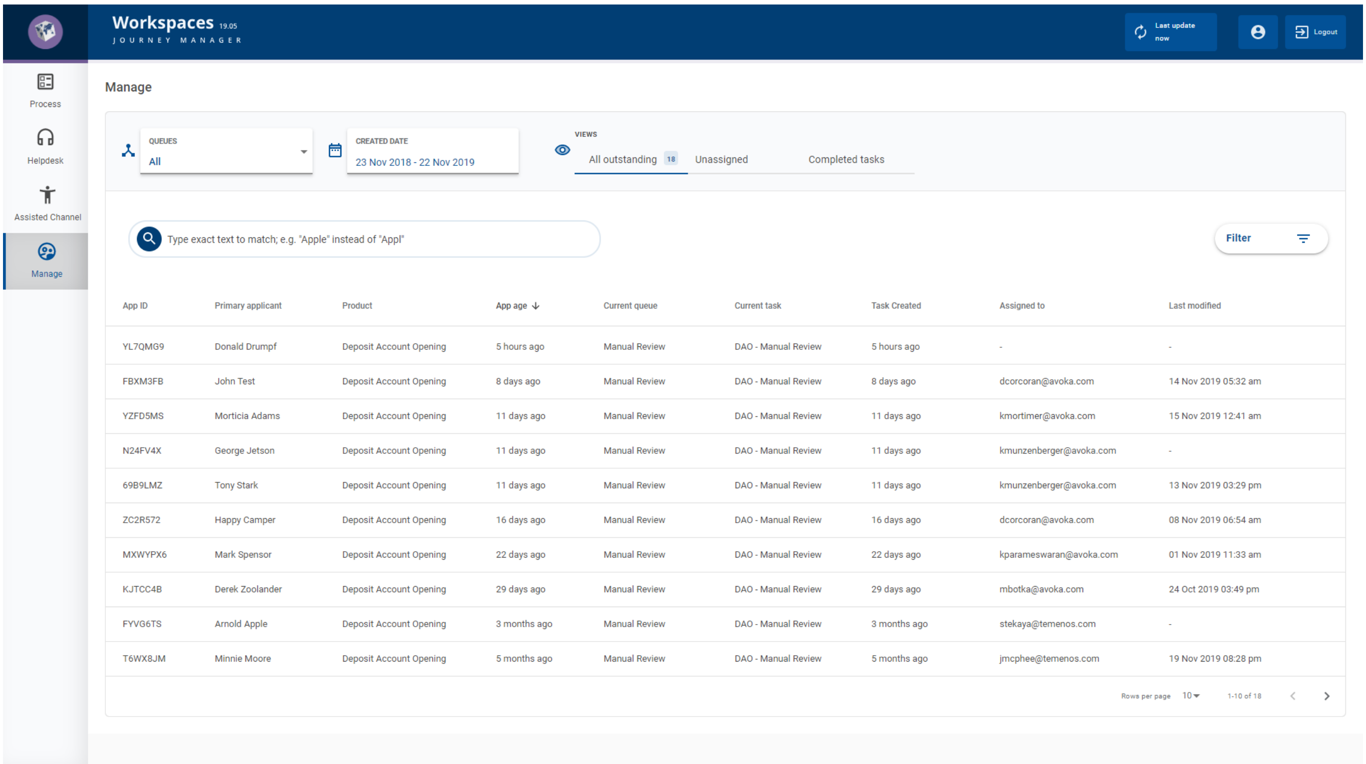
[1]A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service - quality, availability, responsibilities - are agreed between the service provider and the service user.

- A [Bulk Action] mode switch to change between acting on a single task or multiple tasks. | 22.10 This feature was introduced in 22.10.
- [Paging tools] that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- [20.05 and later]
- [19.11]
- [19.05]







The Manage space's List screen displays a list of tasks from the selected queue, and 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 Screen

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:

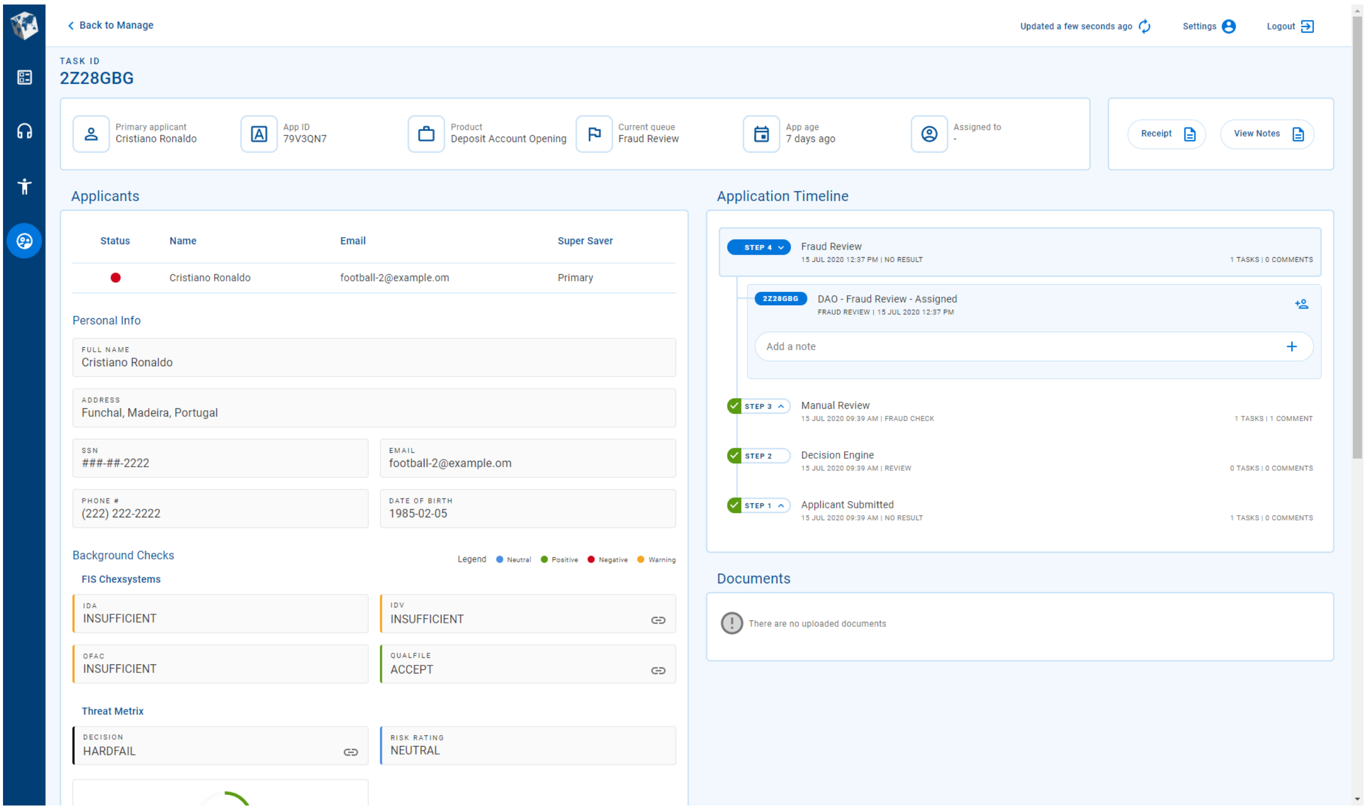
- Key information about the selected application and its tasks.
- The ability to track application progress against an SLA. 19.11This feature was introduced in the 19.11 release
- A set of standard actions that you can perform in the Manage space at the current stage of the application's life cycle. 20.05This feature was introduced in the 20.05 release
- A tabset providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details. 19.11This feature was introduced in the 19.11 release
  - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability. 19.11This feature was introduced in the 19.11 release

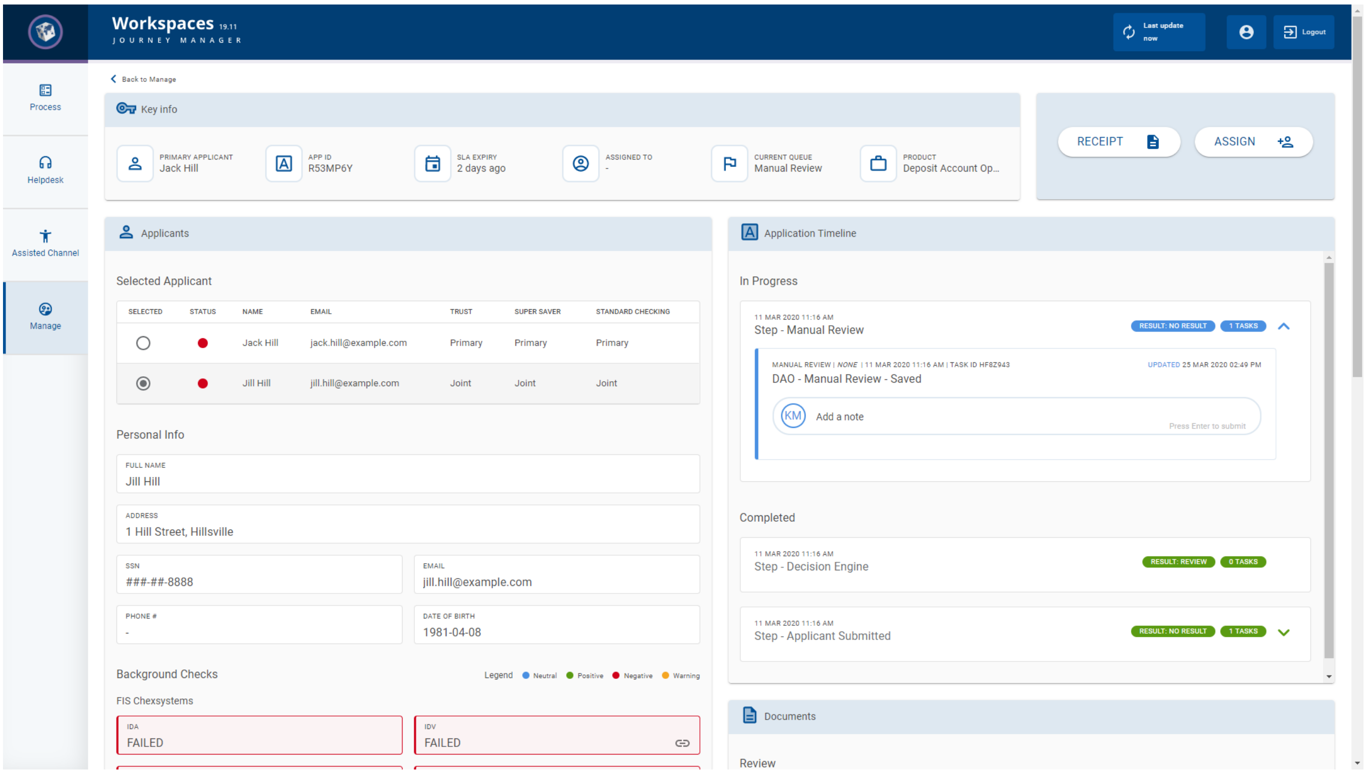
  The other custom information, shown on additional tabs, includes:
  - Any other custom information that is not included in the standard cards, or that is presented differently.
- A feature-rich application timeline showing all the steps (tasks) that the application has progressed through, key details, and accompanying notes. Select a step to reload the Details screen in the context of that task. 20.05This feature was introduced in the 20.05 release

- 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. 20.05This feature was introduced in the 20.05 release
- Attached documents relating to the application. 19.11This feature was introduced in the 19.11 release | 22.10This feature was updated in the 22.10 release

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

- v20.05
- v19.11 and earlier





Actions

The following actions are available in the Manage space.

- **Assign**: Assign a task to a Workspaces user.
- **Reassign**: Assign an assigned task to another user. 22.10This feature was introduced in the 22.10 release
- **Unassign**: Remove a task assignment for any task.
- **View Notes**: View all of the notes from all of an application's tasks.

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

Assign, Reassign, 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

[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.

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

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.

Reassign is a handy shortcut action that removes the need to explicitly unassign a task before assigning it to someone else. Looking at the example in the previous paragraph, instead of unassigning the task from the staff member that goes on leave and then assigning it to someone else, you can simply reassign the task to change who the task is assigned to.

Action Examples

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

There are examples for the following actions below.

- Assign a task on the List screen
- Reassign a task on the List screen
- Unassign a task on the List screen

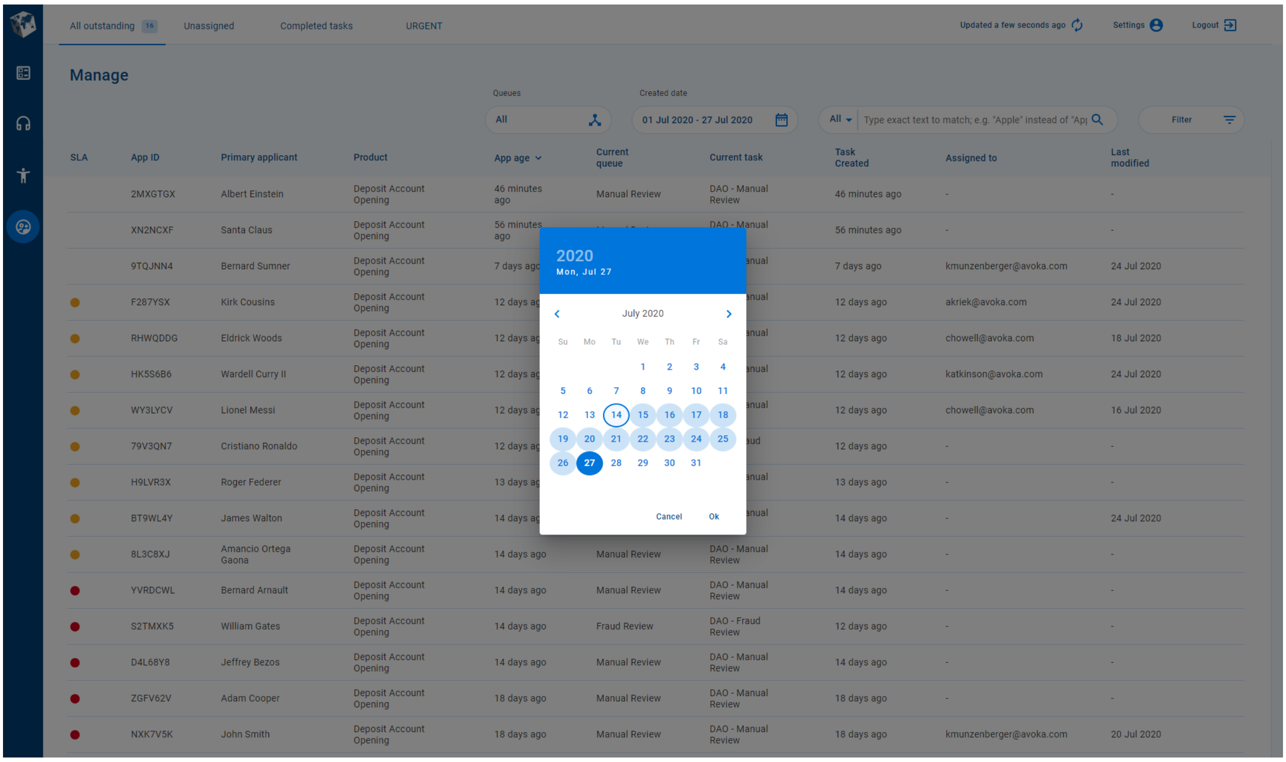
Step-by-step examples are also available for other actions that you may find useful while managing tasks.

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen
- Upload a document on the Details screen

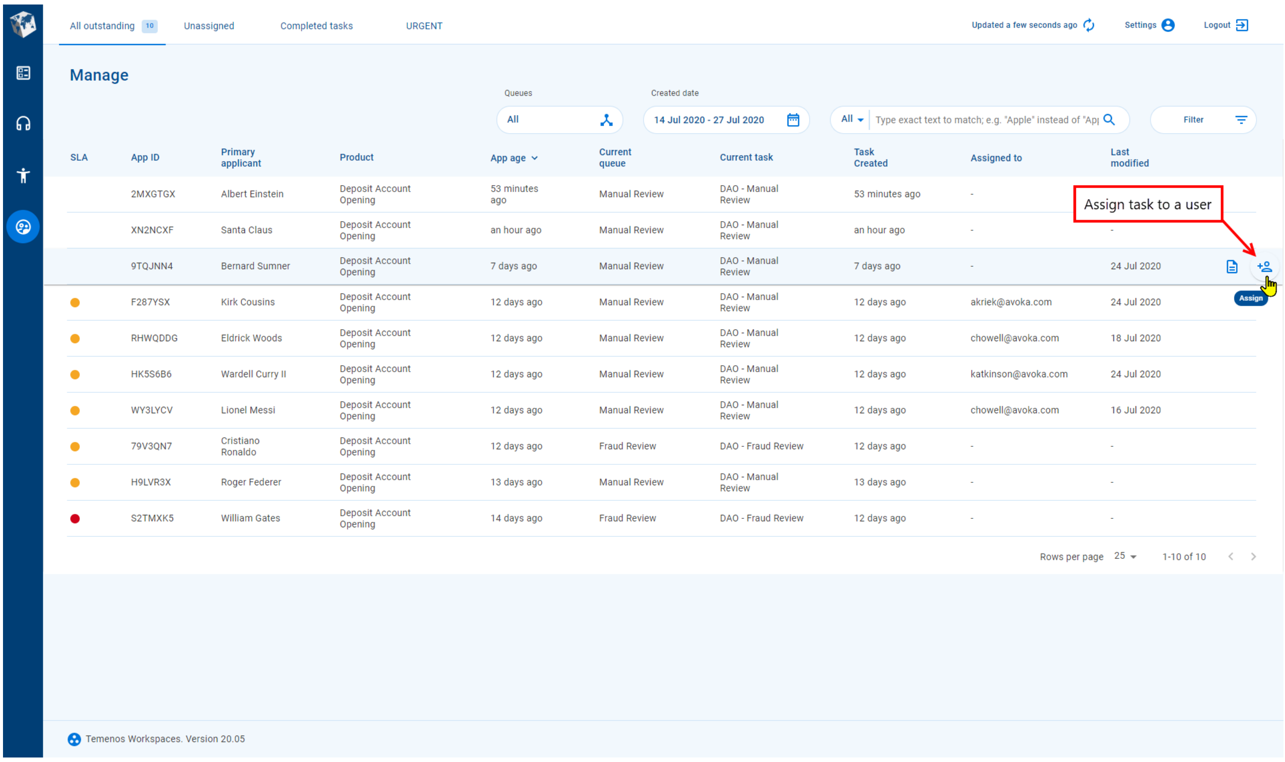
Assign a Task

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

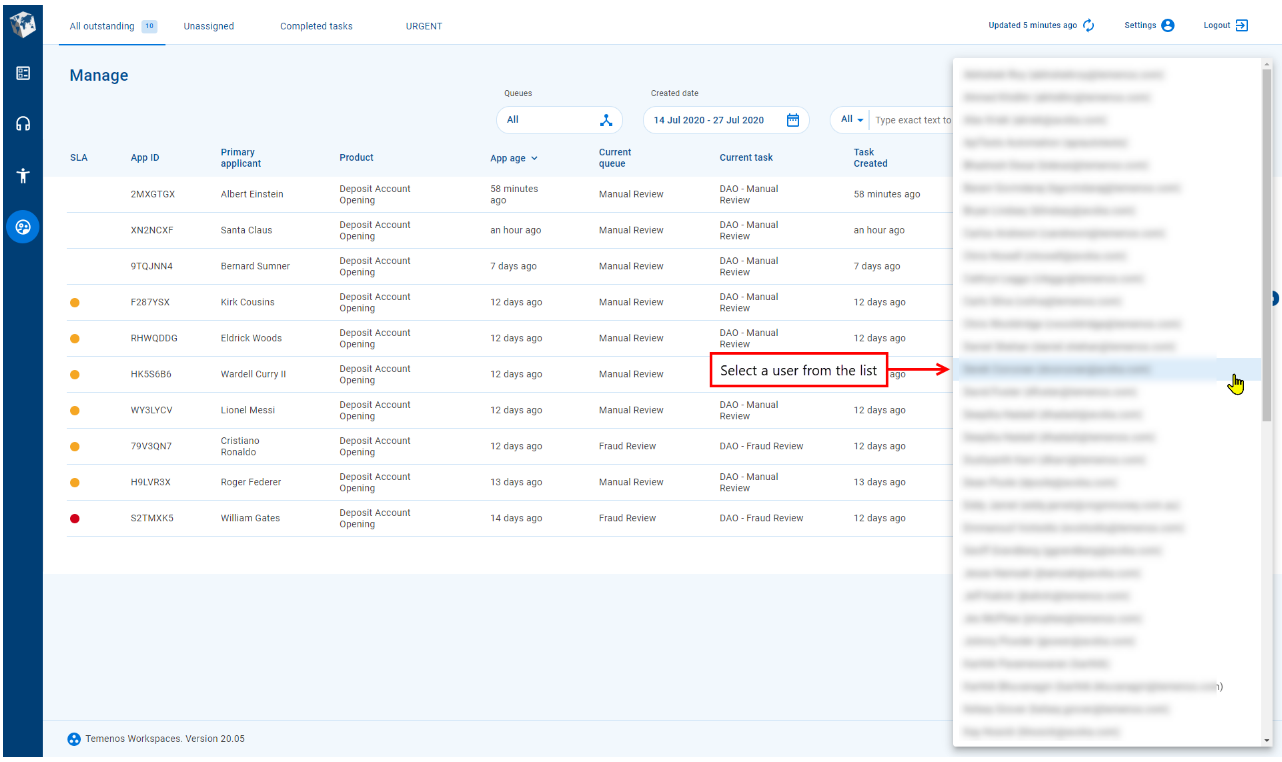
1. Login to Workspaces and select the Manage space.
2. Click Created Date and select a range of dates that covers recently submitted applications, narrowing down the list of tasks and making it easier to see the task you want to assign.



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.

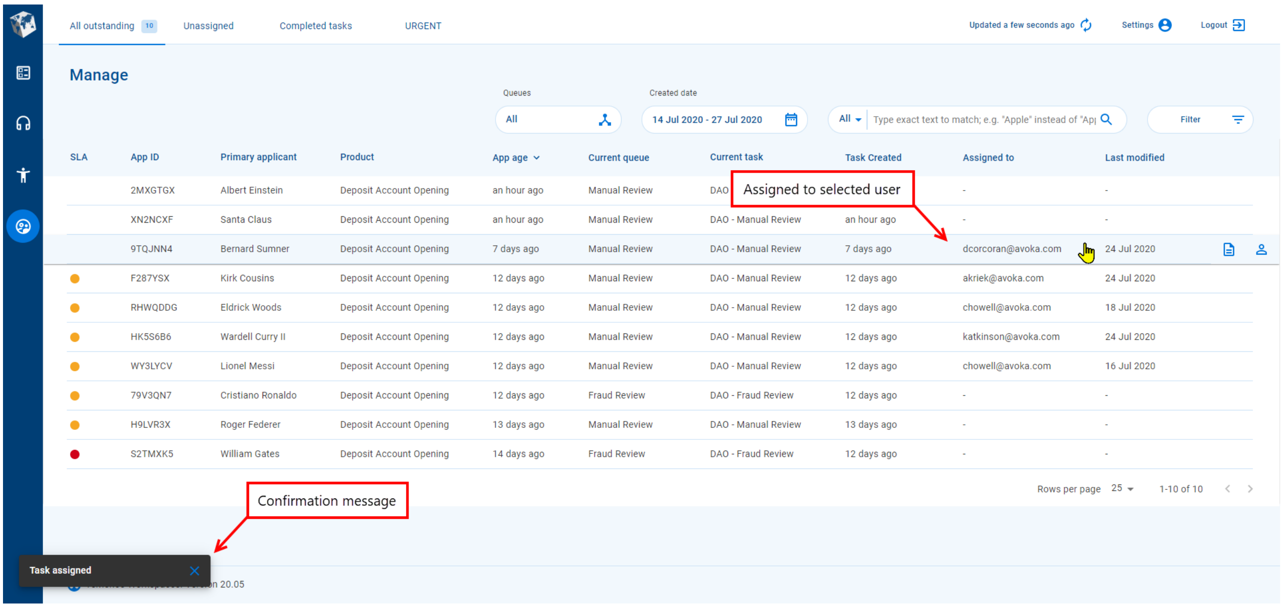


4. Select the user that you want to assign the task to from the list.



INFO | 20.05 THIS FEATURE WAS INTRODUCED IN 20.05.
The user list displays both the Workspaces user id and the 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.

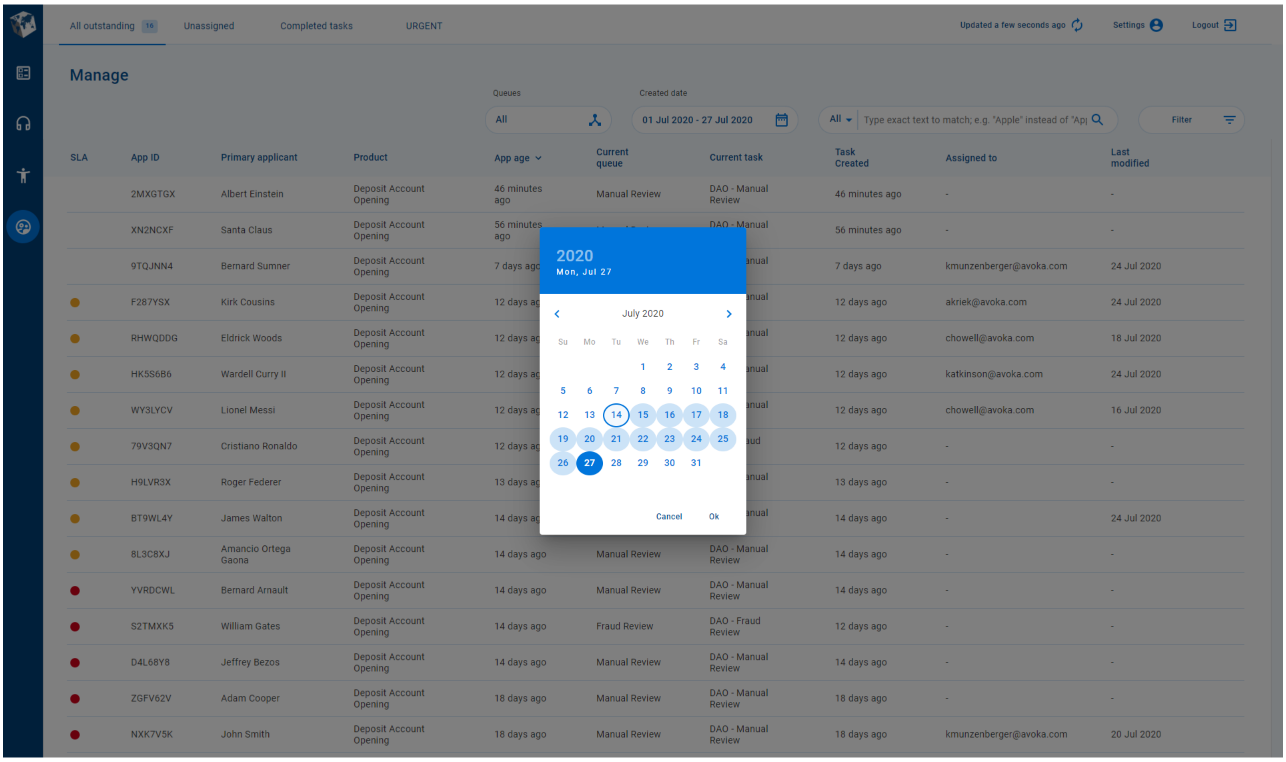


Alternatively, you can click the task to display its application details, then click Assign on the Details screen and select the user to assign the task to.

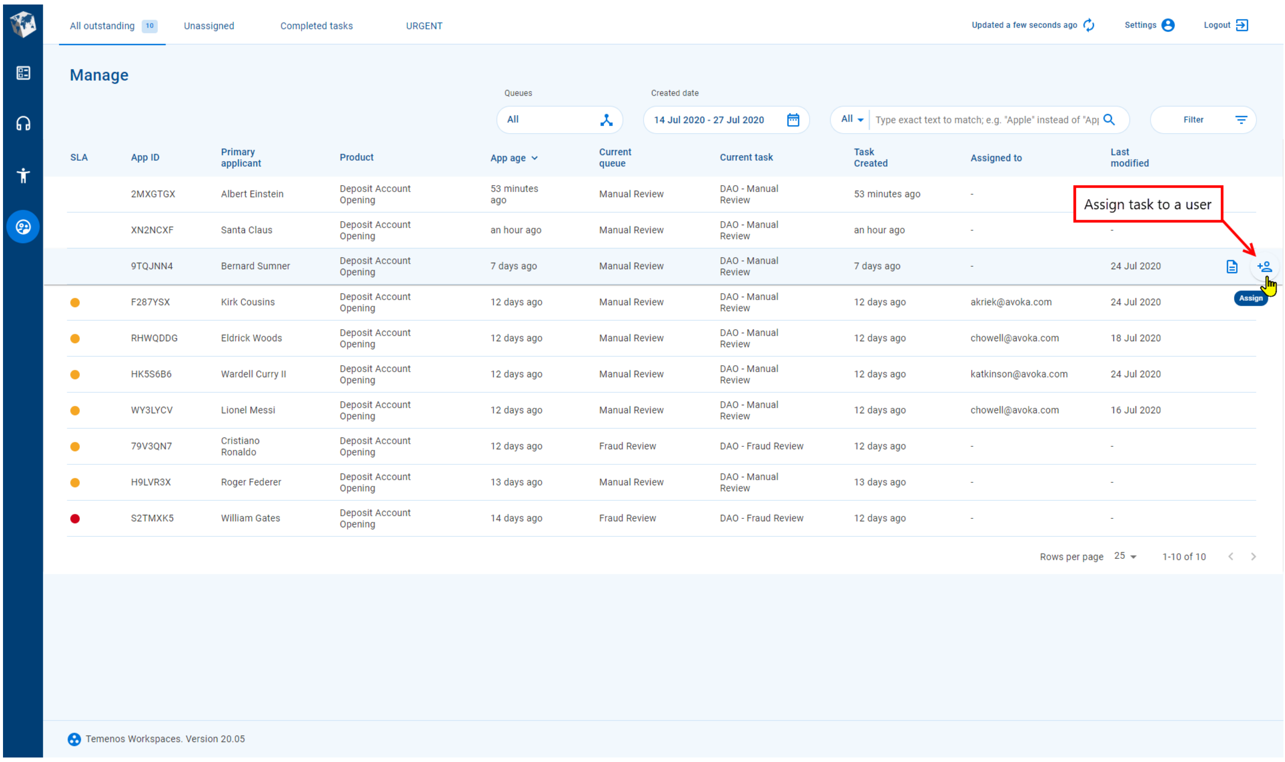
Reassign a Task

This example shows you how to use view filters to narrow down the item list to just those tasks assigned to a specific user, then reassign a task to another Workspaces user.

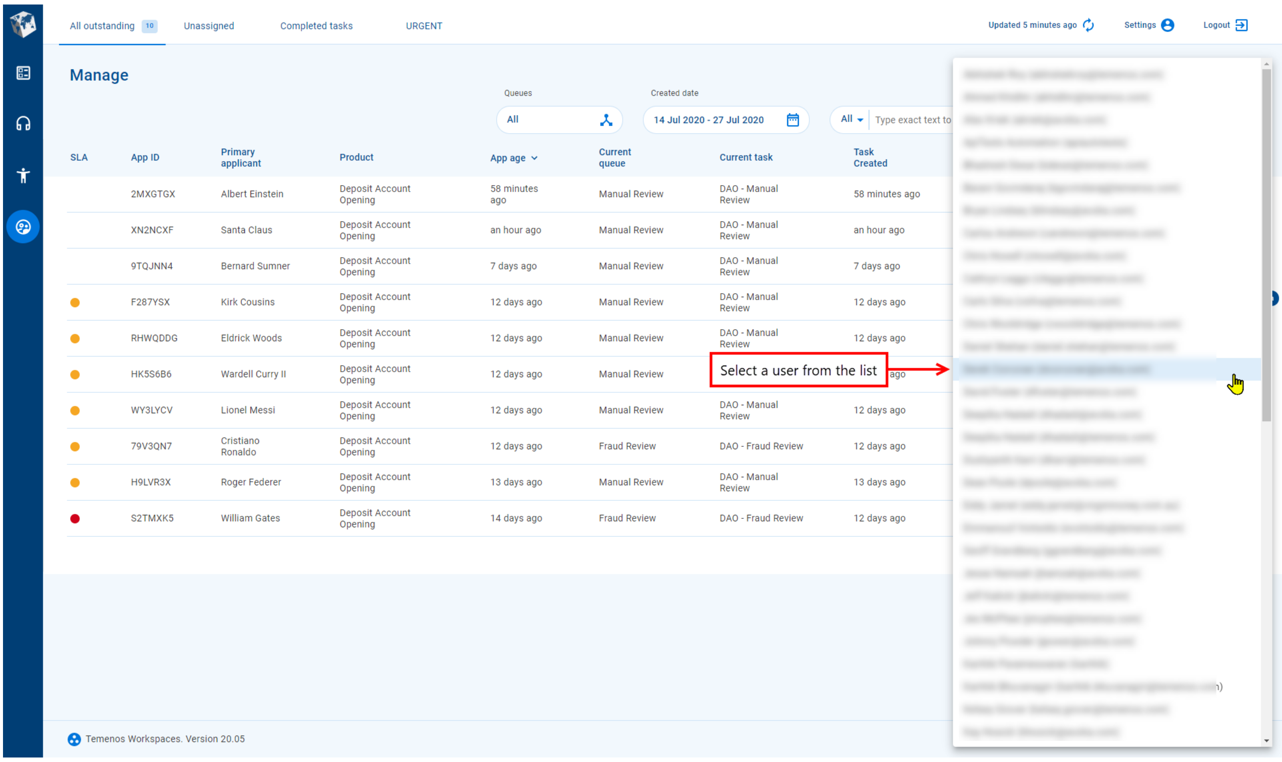
1. Login to Workspaces and select the Manage space.
2. Click Filter to open the Filters selector then enter a Workspace user id in the Assigned to field and click Apply, narrowing down the list of tasks and making it easier to see the task you want to reassign.



3. Point your cursor at the task that you want to reassign. The available actions appear at the right-hand side. Click (Reassign) to display the list of Workspaces users.

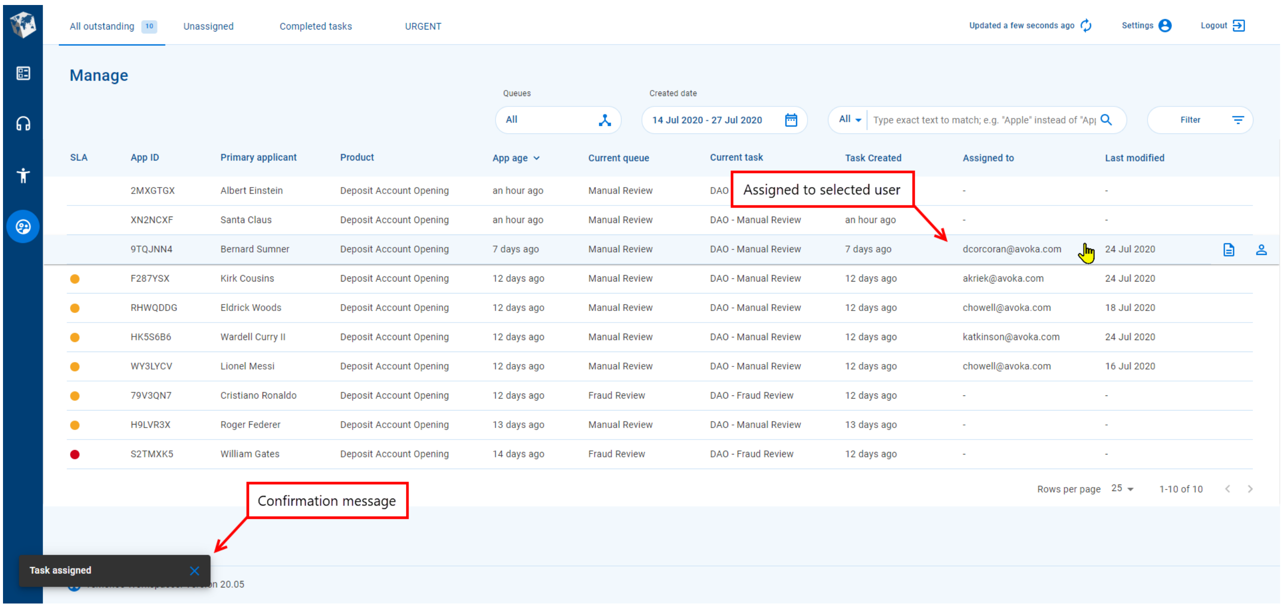


4. Select the new user that you want to reassign the task to from the list.



INFO | 20.05 THIS FEATURE WAS INTRODUCED IN 20.05.
The user list displays both the Workspaces user id and the full name for each user.

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

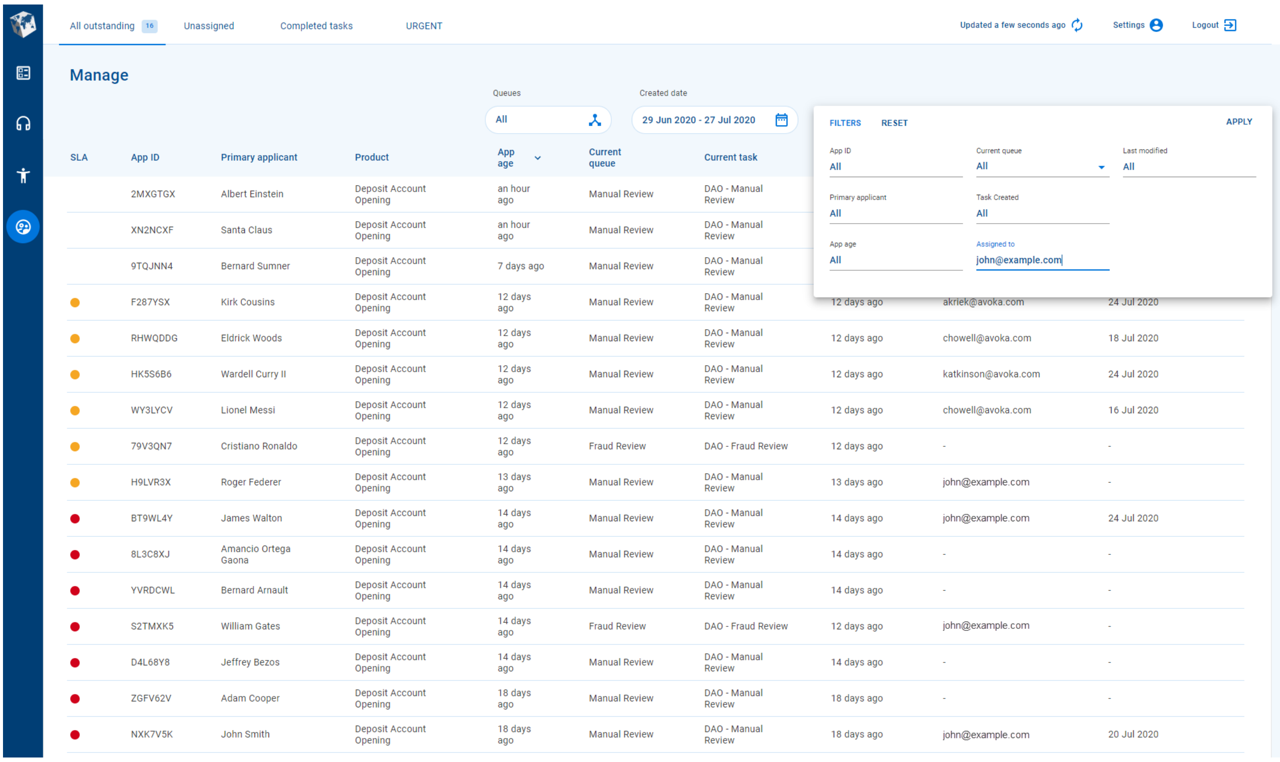


Alternatively, you can click the task to display its application details, then click Reassign on the Details screen and select the user to reassign the task to.

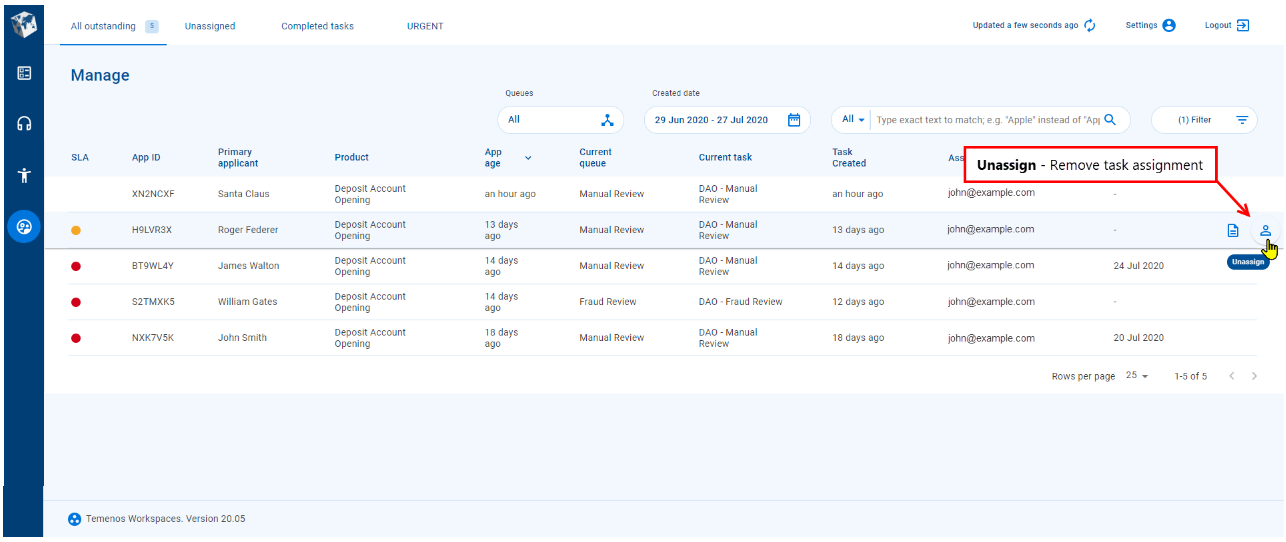
Remove a Task Assignment

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.

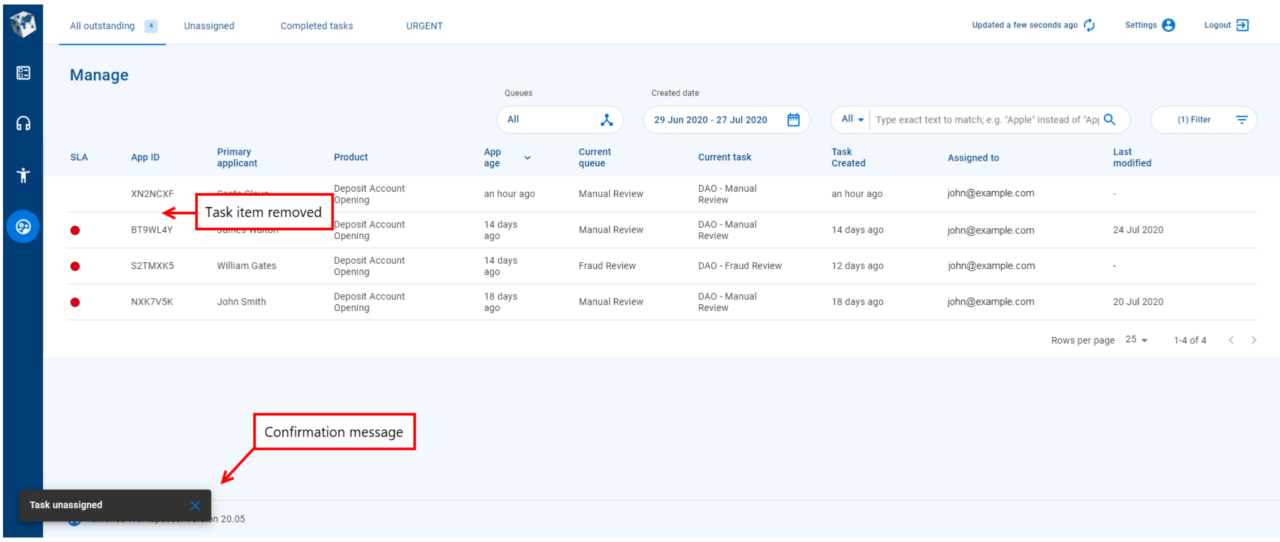


3. Select a user from the list then click outside the Filters selector twice to close it. This reduces the number of items in the item list, making it easier to see the task you want to unassign.
4. Now, you can unassign the task. Point your cursor at the task that you want to unassign - the available 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 screen.

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 Applicants Space Overview

WorkspacesBack office manual processing. | Workspaces Applicants User | 21.11 This feature was introduced in 21.11.

Journey Workspaces is a highly configurable and feature-rich business portal targeted at authenticated bank staff conducting activities like application resolution and customer service. As originally designed, Workspaces doesn't accommodate other audiences, a notable omission being the involvement of applicants and their representatives in the application resolution process. To address this audience, we've introduced a new applicant-focused portal – the Workspaces Applicants space – that gives authenticated non-bank users access to a limited set of application-related features. While it is still not possible to accommodate anonymous users, the Applicants space enables your organization to improve the customer's experience by letting them contribute to the progress of applications through the full application life cycle.

What is the Applicants space?

The Applicants 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 Applicants 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 Applicants space helps to improve the speed and accuracy of the application resolution process.

Key features of the Applicants 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 Applicants 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 Applicants space experience.

The Applicants 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 Applicants space for?

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

What's included?

Applicants 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 Applicants space configuration to get you up and going faster. Authorized users can download the latest Workspaces distribution which includes the default Applicants space configuration. More information is available in the Applicants space technical documentation to help you configure your Applicants space to meet your needs.

Browser Support

Journey Applicants 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 Journey Applicants 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 Journey Applicants experience.

The Applicants Space Search Screen

WorkspacesBack office manual processing. | Workspaces Applicants User | 21.11 This feature was introduced in 21.11.

NOTE

Some of the text and images below may not match what you see in your Applicant portal. This is because the features described are based on a default Applicant portal configuration, and your Applicant portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Applicant portal.

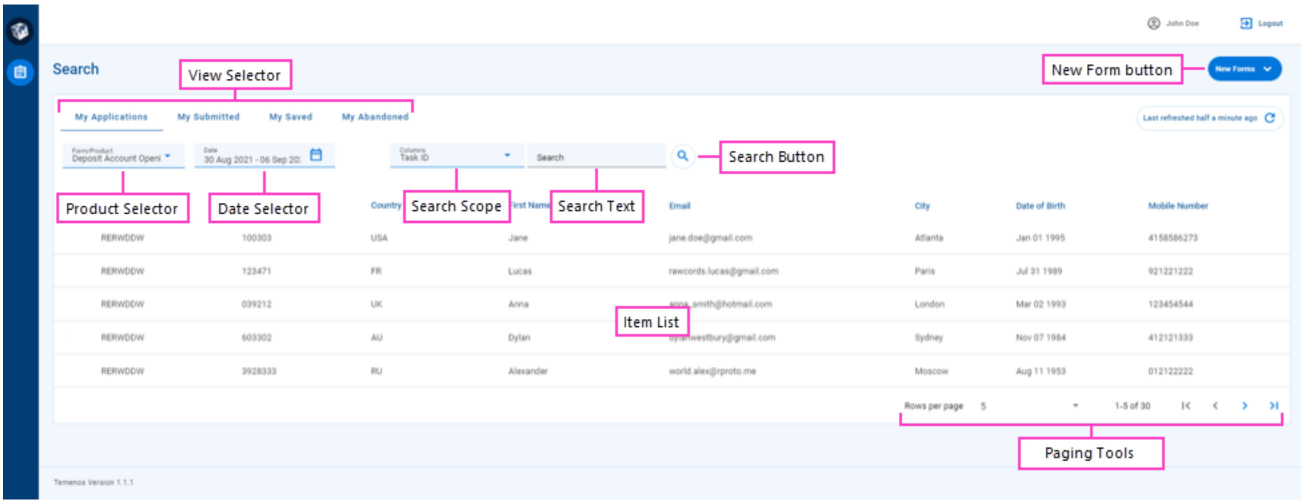
Overview

When you select the Applicants 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 Applicants 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 [screen 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.

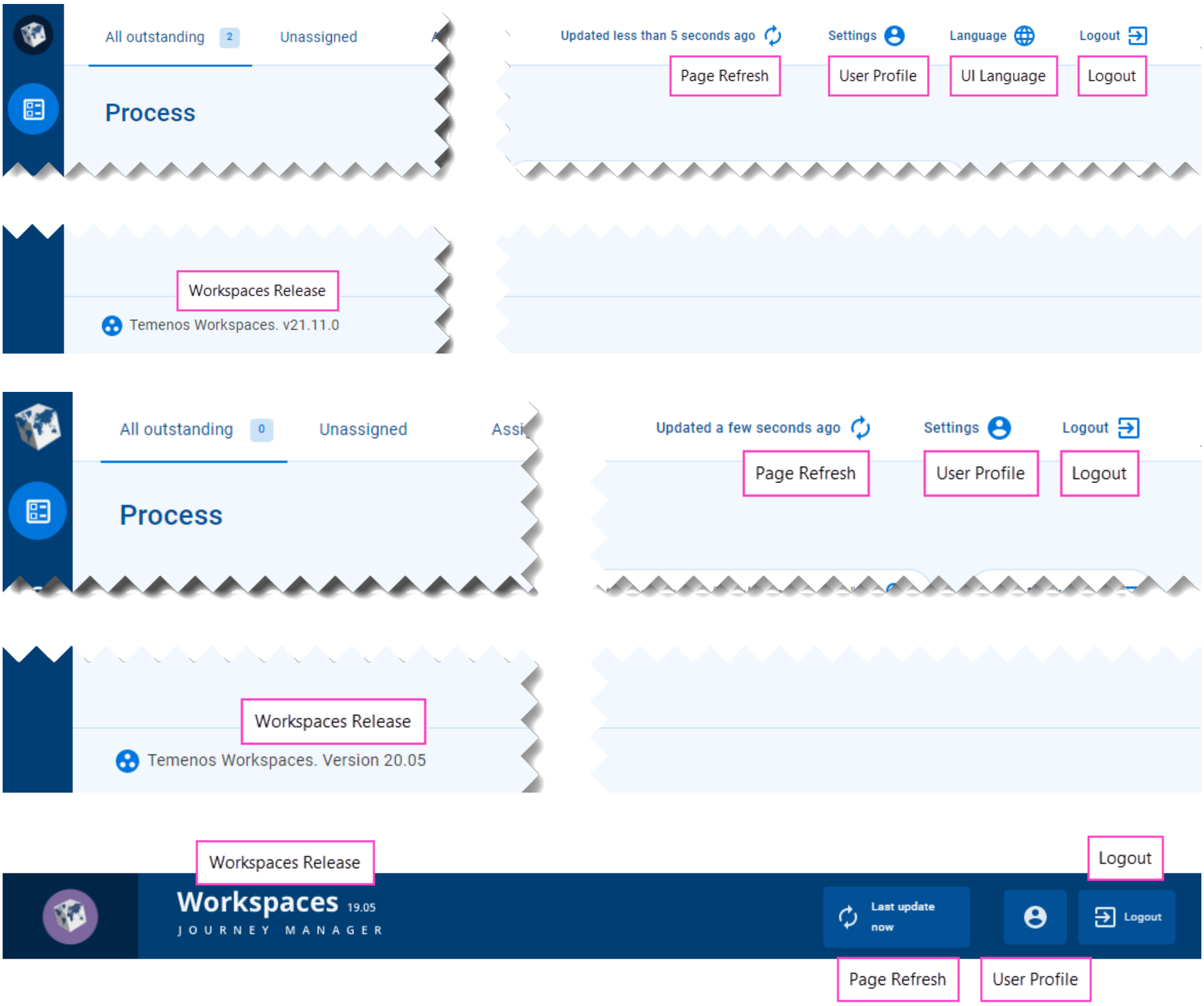
Once you've found the item you're looking for, select it to view more about it on the Details screen where you can interact with it further.

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

Page Header

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

- [21.11]
- [20.05]
- [Prior to 20.05]



On the screen 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 This feature was introduced in 21.11.
- An option to log out of your current Workspaces session.

NOTE

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.

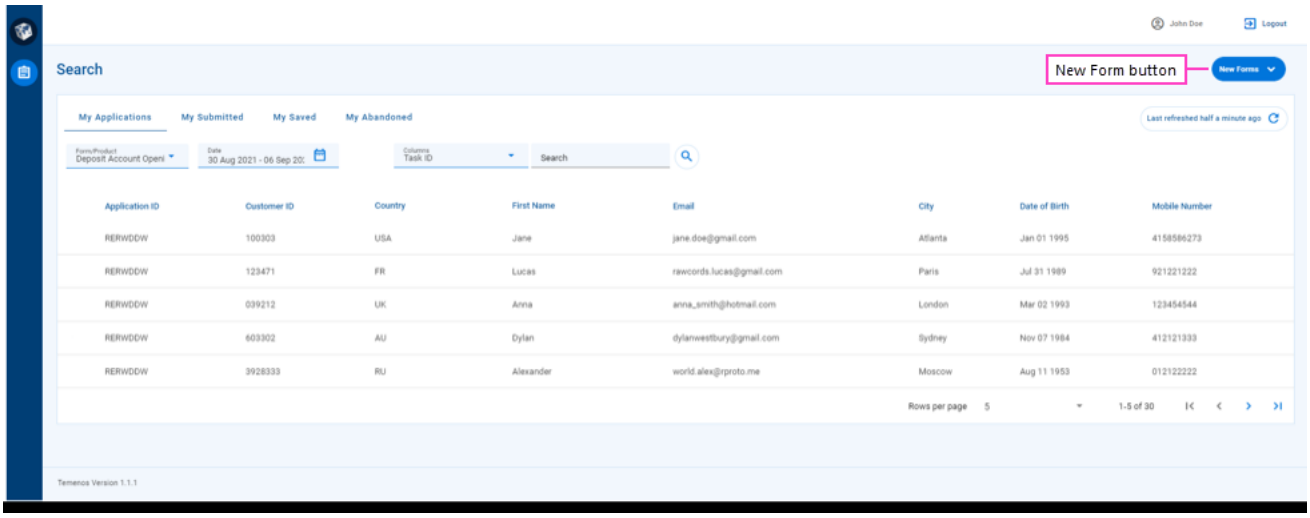
When you navigate to a Workspaces screen, the information displayed is up-to-date but it can become stale over time. The elapsed time since the screen was last updated is shown in the screen header on the Page Refresh button. If the screen has not been updated recently or you want to see the latest information, 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 Applicants space includes a set of [standard actions] for working with applications and tasks. However, unlike other Workspaces spaces, the Applicants space functionality cannot be extended using [custom actions] as these aren't currently supported in the Applicants 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 Applicants Space Actions.



NOTE

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

To start a new application, click New Application (1) and select a form type from the list displayed (2). The application form is displayed in a modal window (3). Fill out the application form and save or submit it (4) then close the modal window (5). Your new application will appear at the top of the item list (6).

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 Applicants space may differ from the default configuration.

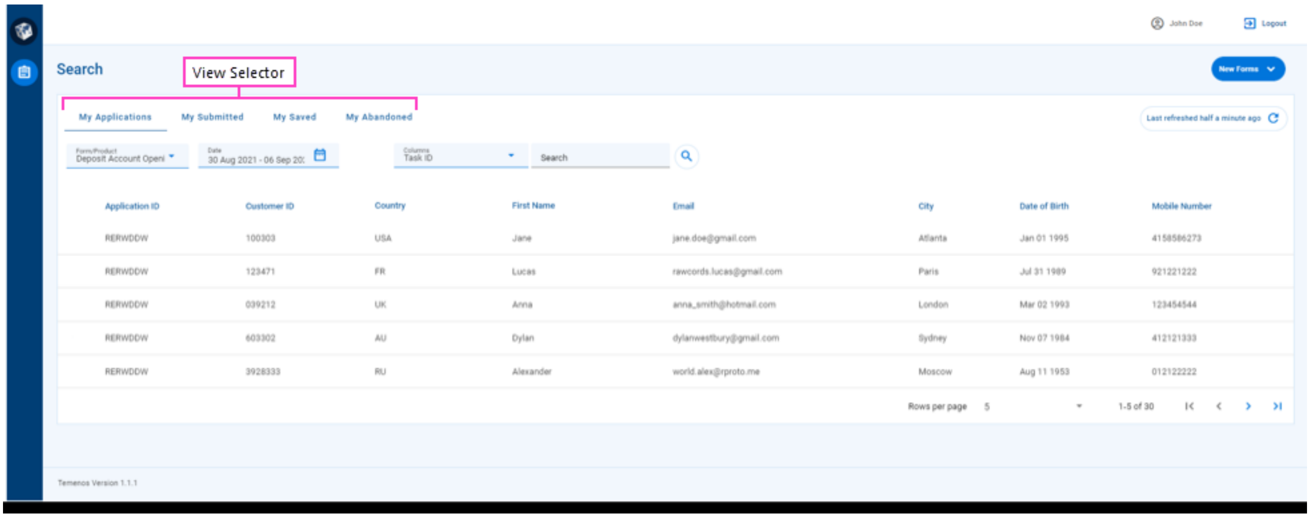
The items displayed in the item list satisfy a set of criteria that is determined by selecting a view then, optionally, further refining the list of items by selecting a product and/or a date range, or by searching for specific items. Items appear in the item list if they:

- 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 Applicants 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 Applicants 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)

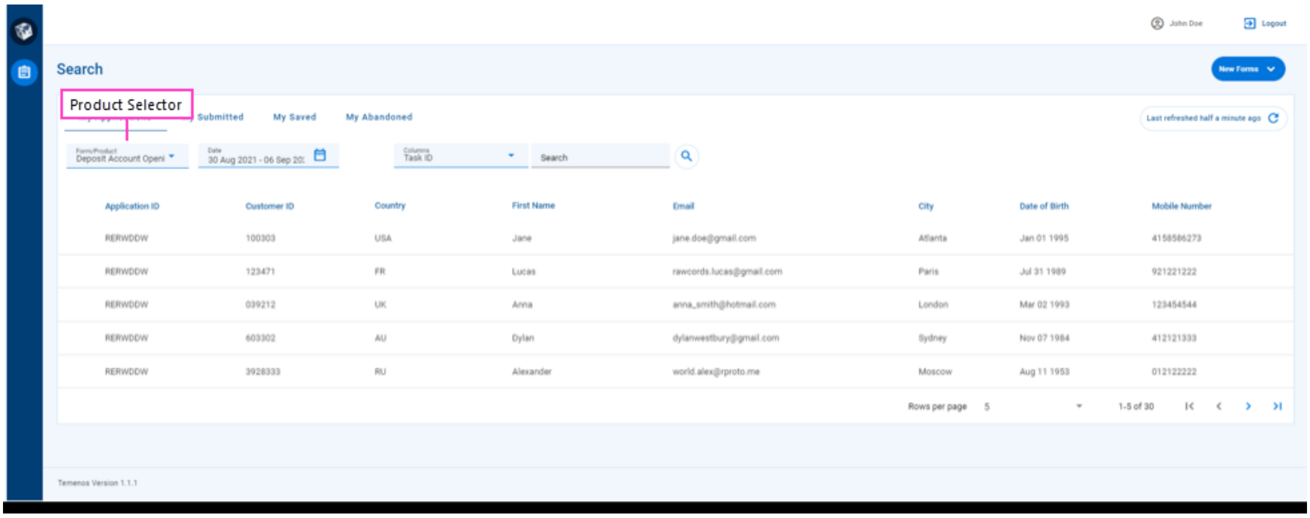
Each item in the View selector represents a view. Click an item in the View selector to make it the current view. When a view is selected, it's configuration is applied to the item list to restrict the items displayed. A color highlight provides a visual indication of which view is selected.

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 Applicants 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.

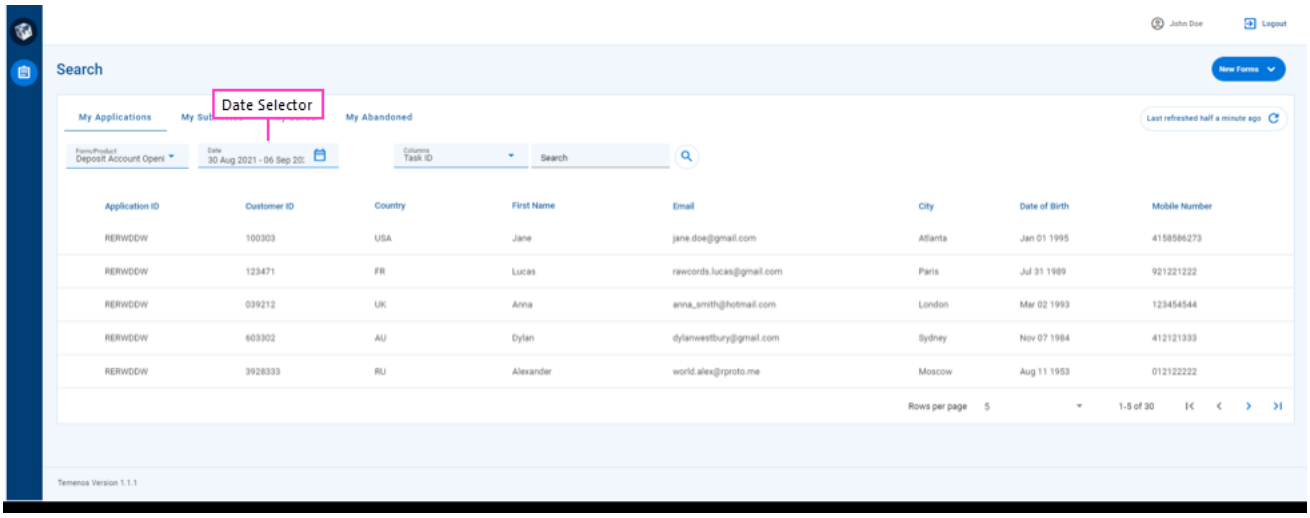


The available products are listed in the Product selector's dropdown list as well as an All item. You can choose any product from the dropdown list to restrict the items displayed in the item list. If you choose All, the item list is populated with items for all products.

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

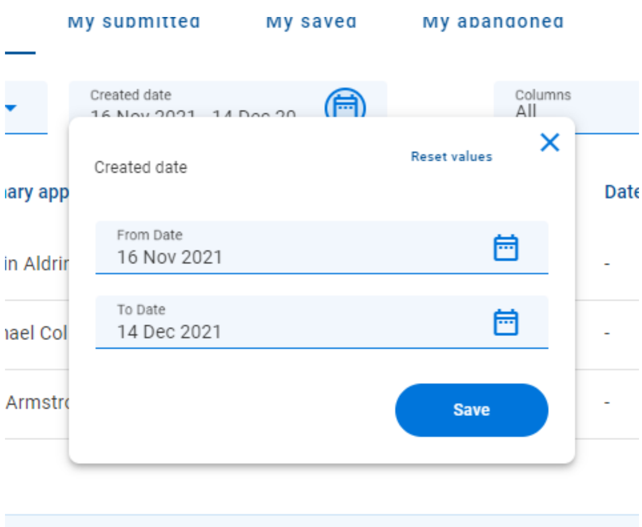
Created Date Selector

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.



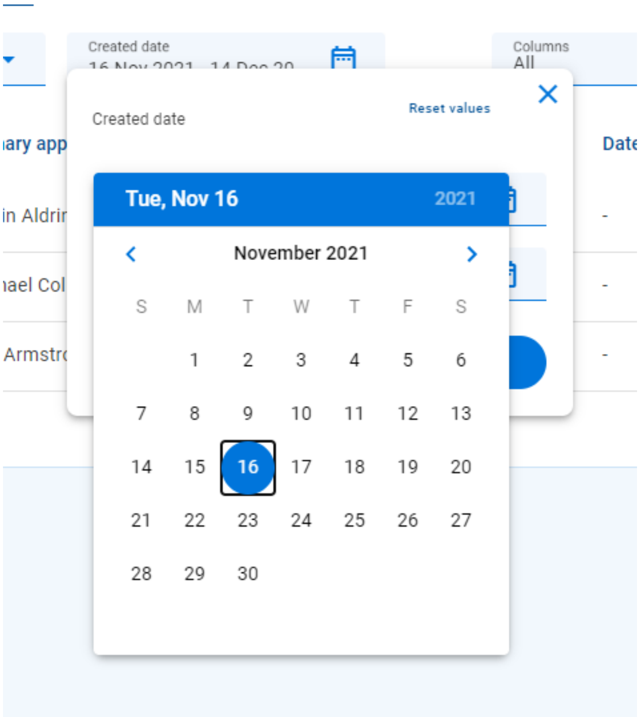
The default date filter restricts the items displayed in the item list to just those that were created in the last four weeks including the current date, and this filter is applied the first time you access the Search screen. You can select a different date filter using the Created date selector.

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.



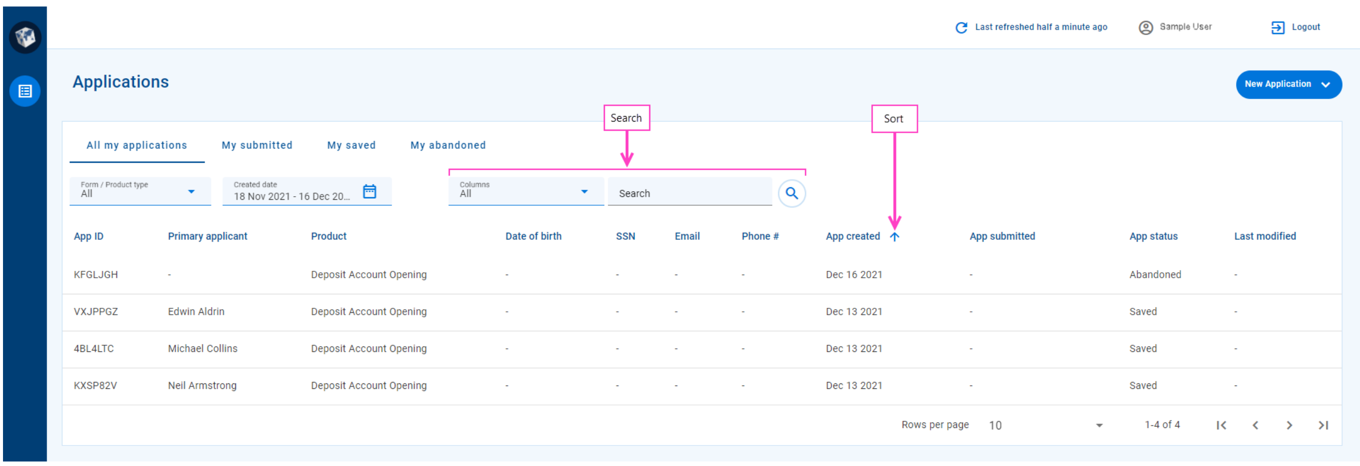
You can enter a date by selecting it from a calendar or typing it in. To discard any dates you've entered and revert back to the original dates when the dialog was displayed, click Reset values. Once you've entered the dates, click Save to apply the date filter. Alternatively, you can click (Close) to 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.



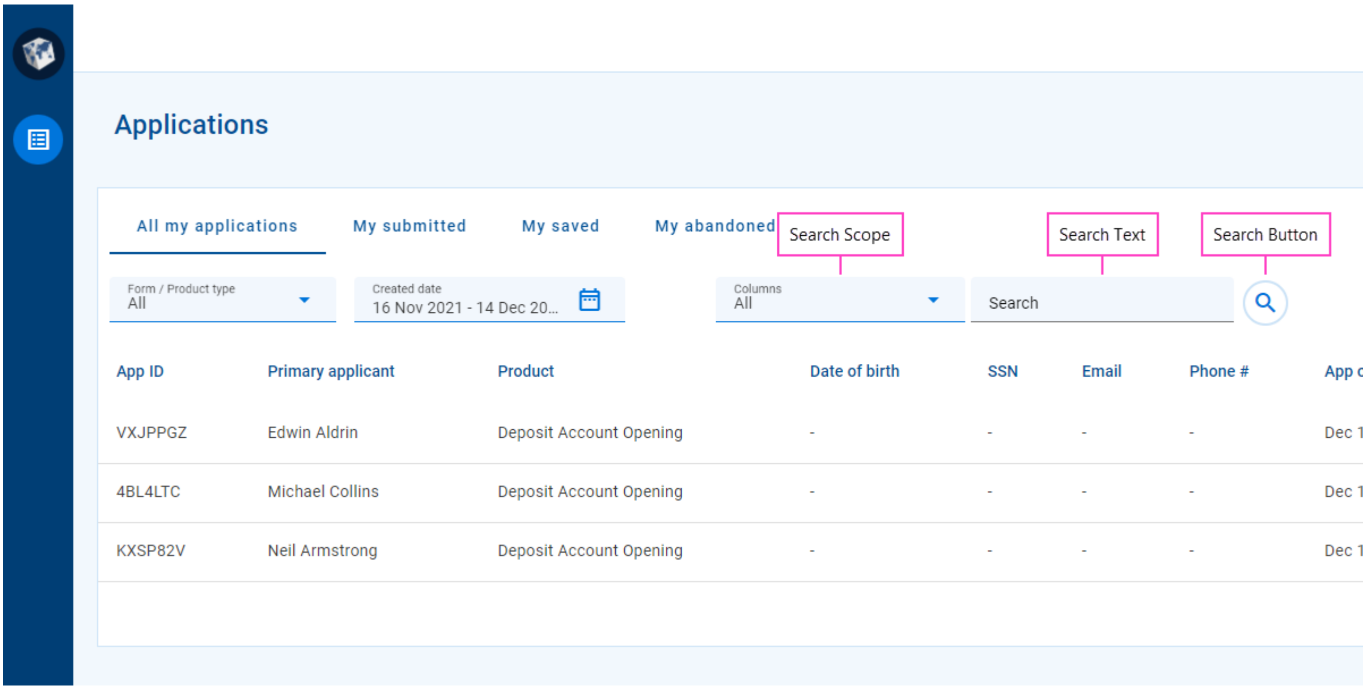
Search and Sort

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.

NOTE

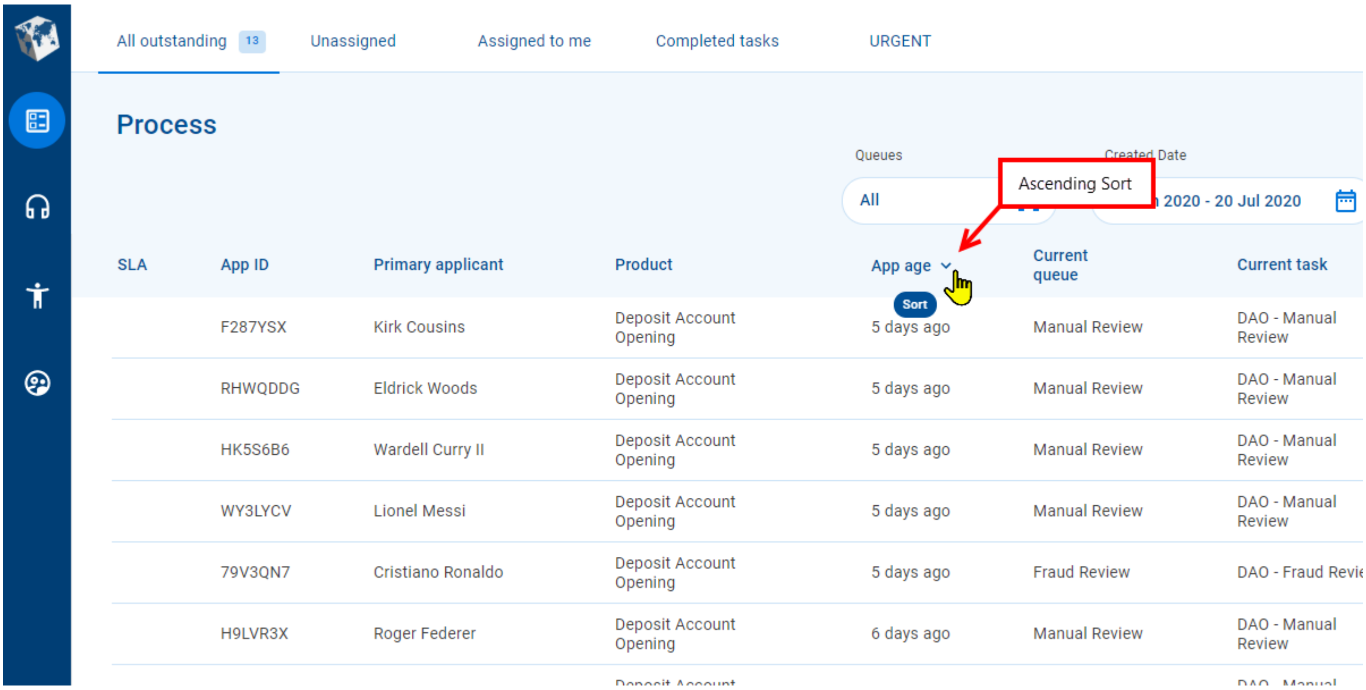
Simply deleting all of the search text does not clear an active search. To clear a search, follow the instructions above.

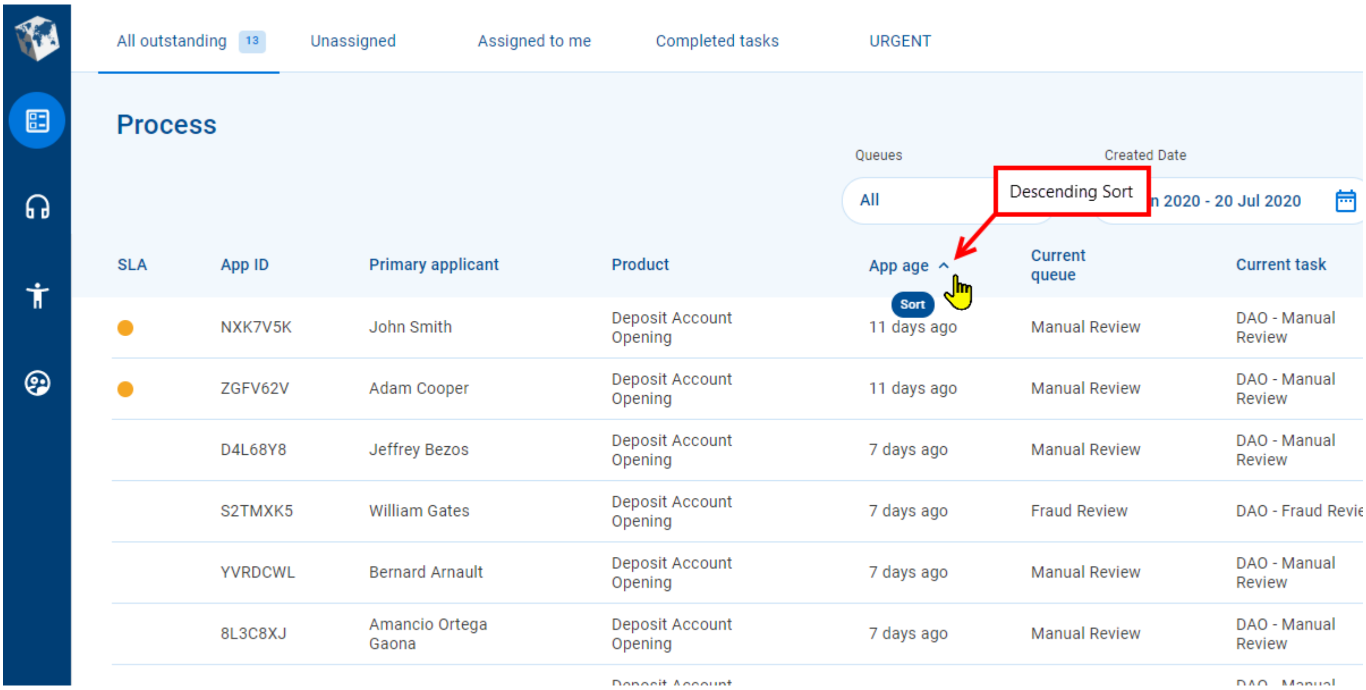
If you select an item in the item list while a search is active, when you subsequently return from the Details screen to the List screen, the search will still be active. This is indicated by the text and ✕ in the **Search** field.

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

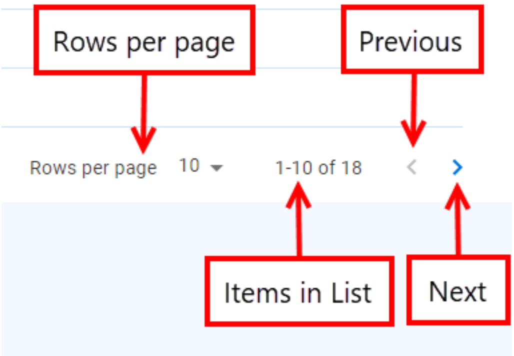




You can determine whether a column is available to use for sorting by pointing your cursor at a column heading. If your cursor changes to the hand pointer and a "Sort" tooltip is displayed, you can sort by the column. To change the sort order, click the column name. If you click the column name for the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

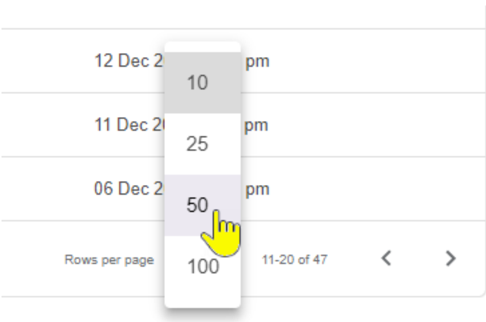
Paging Tools

Sometimes, there are too many items to display all at once on the screen. Paging allows you to see some of the items now then browse the item list one page at a time to see more. Paging tools let you choose the number of items to display on an item list page, and navigate (forward or backward) through the available pages of items.



The navigate_before (Previous Page) and navigate_next (Next Page) paging tools let you browse through item list pages to find the items you need. Click these tools to display the previous or next page of items in the item list. The navigate_before (Previous Page) tool is disabled when the first item list page is displayed; similarly, the navigate_next (Next Page) tool is disabled when the last item list page is displayed.

Rows per page shows the maximum number of items displayed on an item list page. You can select a different page size from the Rows per page dropdown. Selecting a different page size, resets the item list to show the first page again.



The Applicants Space Details Screen

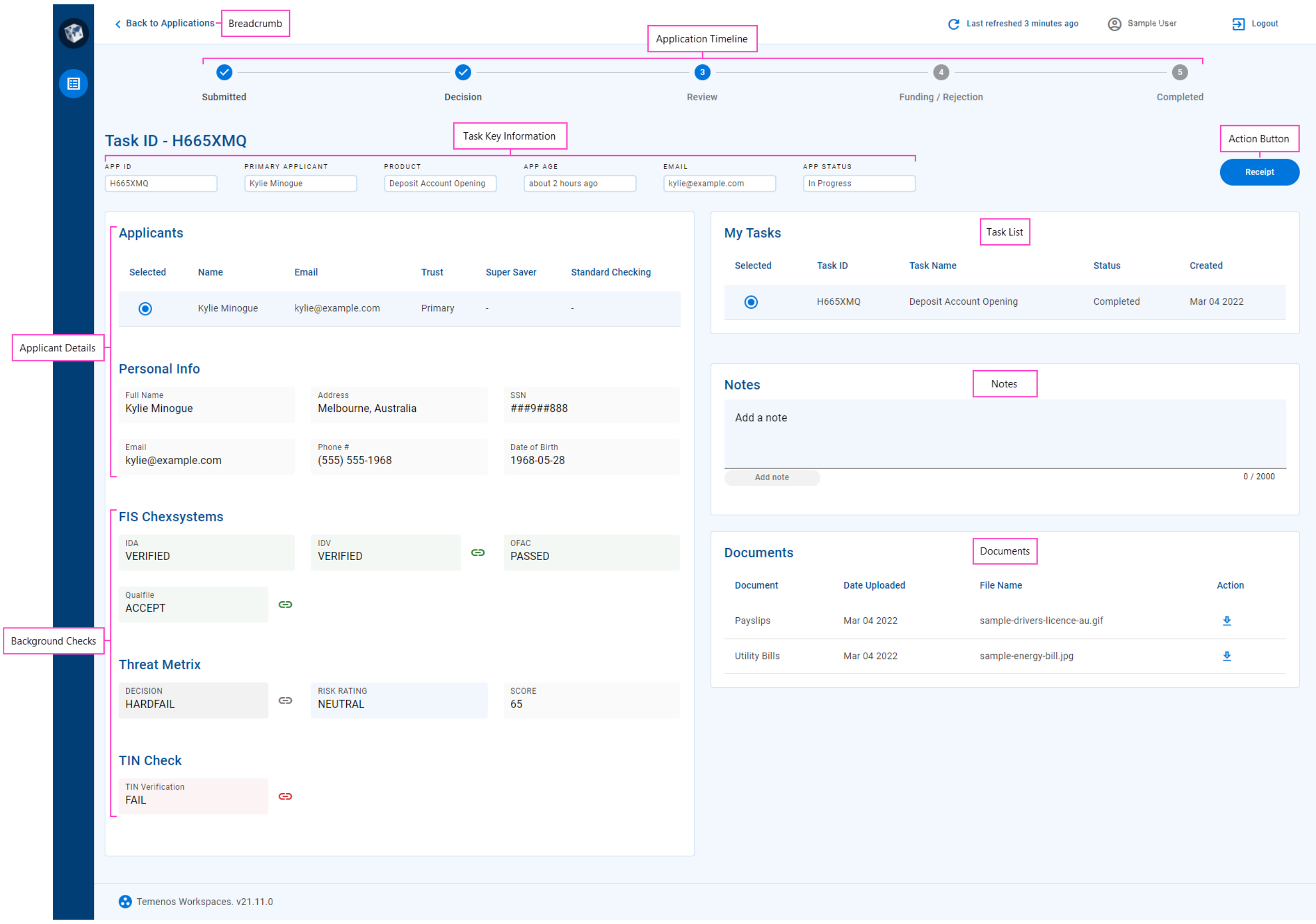
WorkspacesBack office manual processing. | Workspaces Applicants User | 21.11 This feature was introduced in 21.11.

NOTE

Some of the text and images below may not match what you see in your Applicant portal. This is because the features described are based on a default Applicant portal configuration, and your Applicant portal may be configured differently; for example, with your company's branding or with other fields. Nevertheless, the features described work the same way in every Applicant portal.

Overview

The Applicants 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.

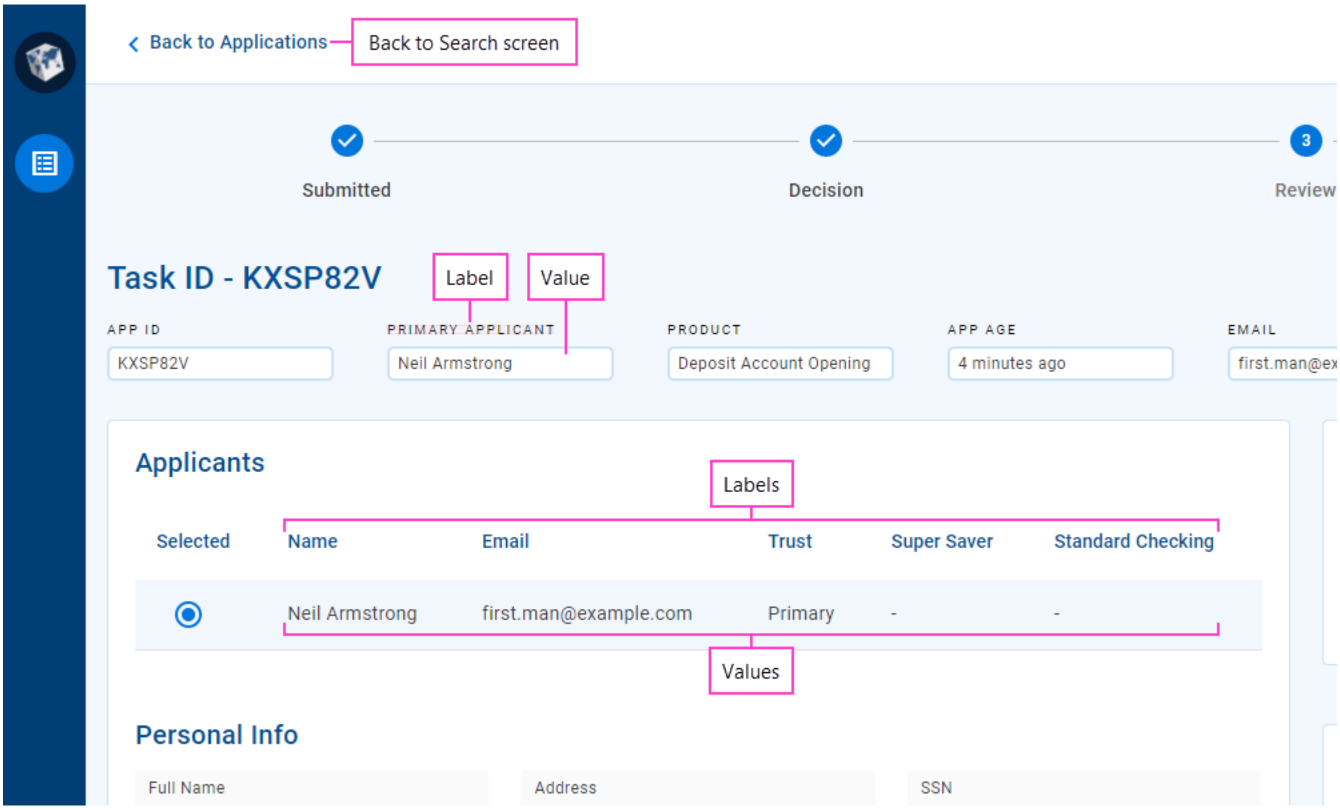


The Details screen in the Applicants space supports many of the standard features of a Workspaces Details screen. It displays comprehensive information about the selected task, and provides access to actions that let the applicant contribute to the application's progression through its life cycle. This 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 (My 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 Applicants 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.
- A timeline of notes relating to the application.
- 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.

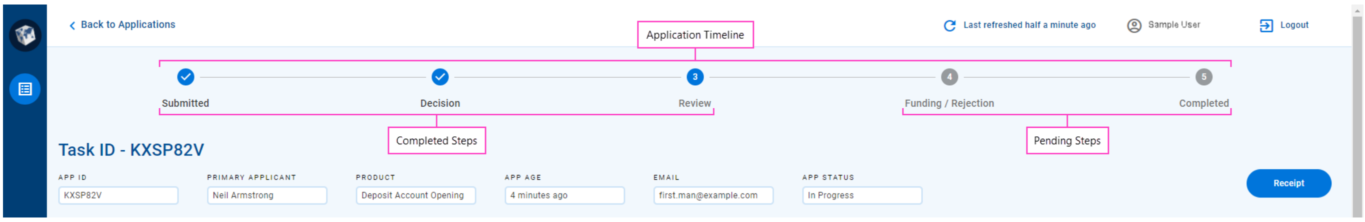
Sometimes a value might be too long to fit in the space available for it; in this case, the value is often truncated and an ellipsis ('…') is appended to indicate that you're not looking at the full value. To see the full value, point your cursor at the truncated value and a tool tip is displayed showing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

Progress stepper

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

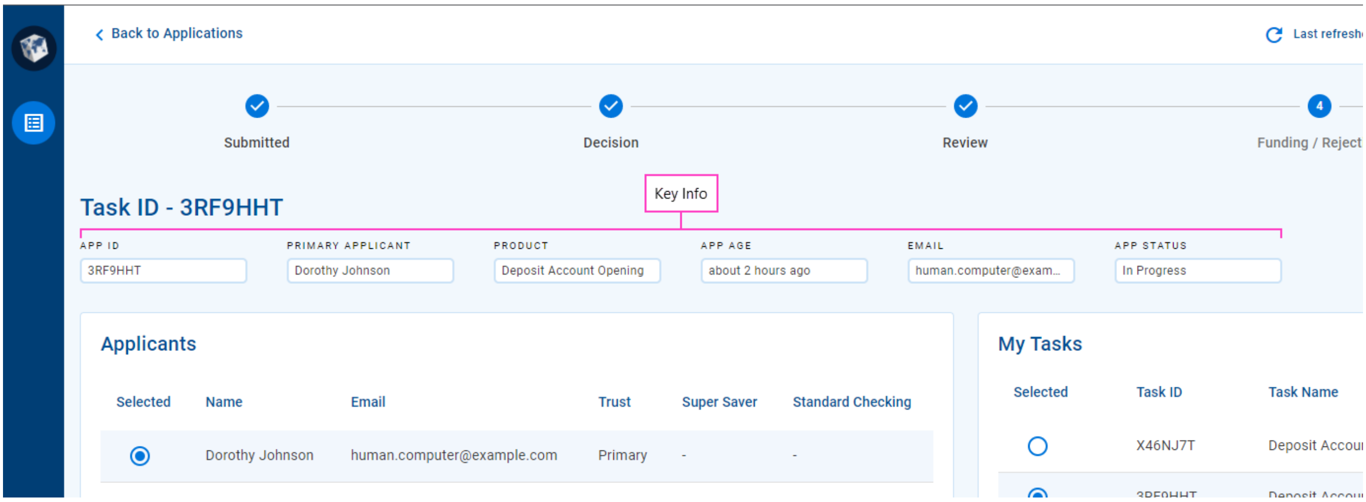


Note

The progress stepper is hidden for saved applications. It is displayed once an application has been submitted.

Key Information

The Key Information card displays important task information that's handy for Applicants 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.

Each key info item can only show a single value. However, additional values can be displayed using a tooltip, indicated by the info (Tooltip) icon. For example, say you have an application covering multiple products. While the Product key info item displays only the first product, a tooltip can be configured to show all of the products covered by the application. To view the tooltip, point your mouse at the info (Tooltip) icon. | 22.10 This feature was introduced in 22.10.

The value displayed in the Product key info item may correspond to a form group. If this is the case, the specific form associated with the task is displayed as the Product. | 22.10 This feature was introduced in 22.10.

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 Applicants space, this information is displayed in the Applicant Details card.

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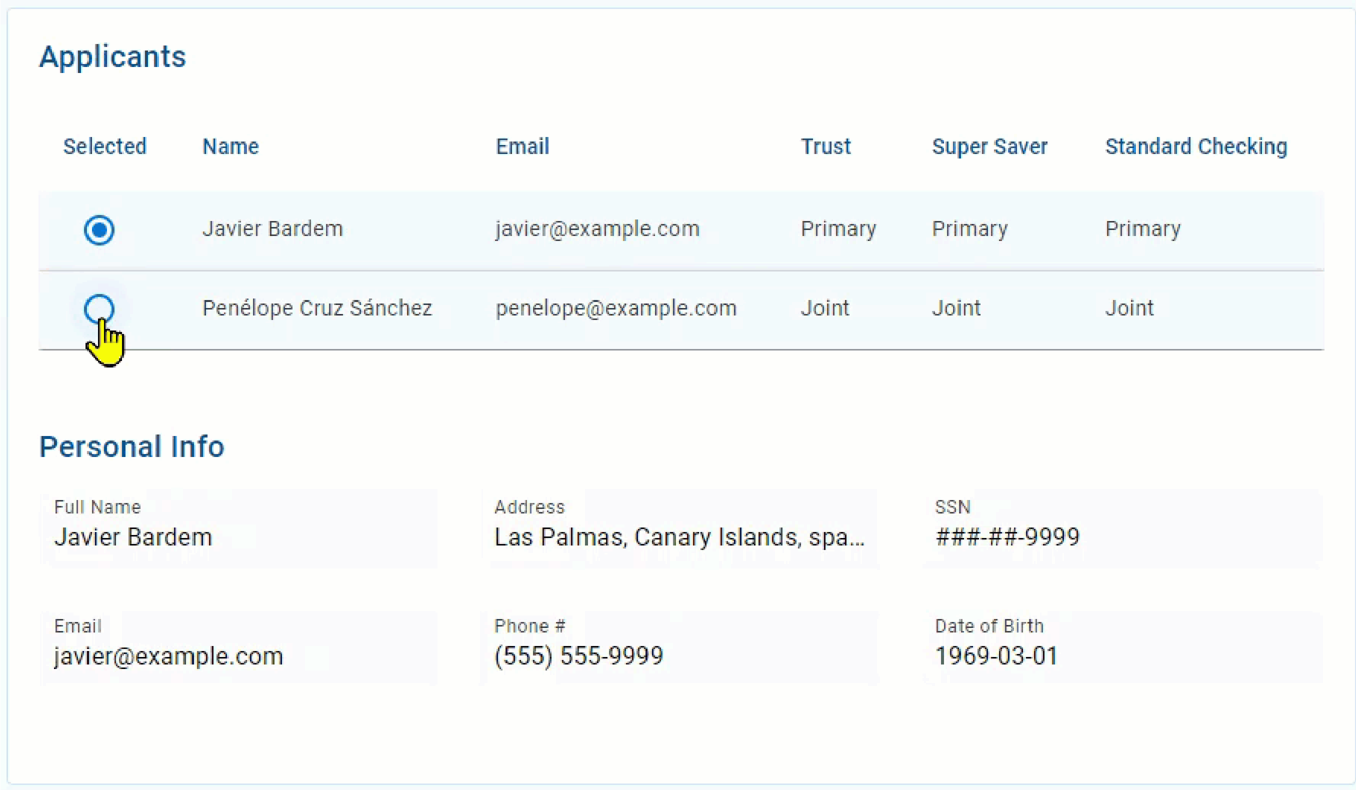
[1]Personally Identifiable Information (PII) is information about an individual that can be used to distinguish or trace an individual‘s identity, such as name, social security number, date and place of birth, mother‘s maiden name, or biometric records; and any other information that is linked to an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

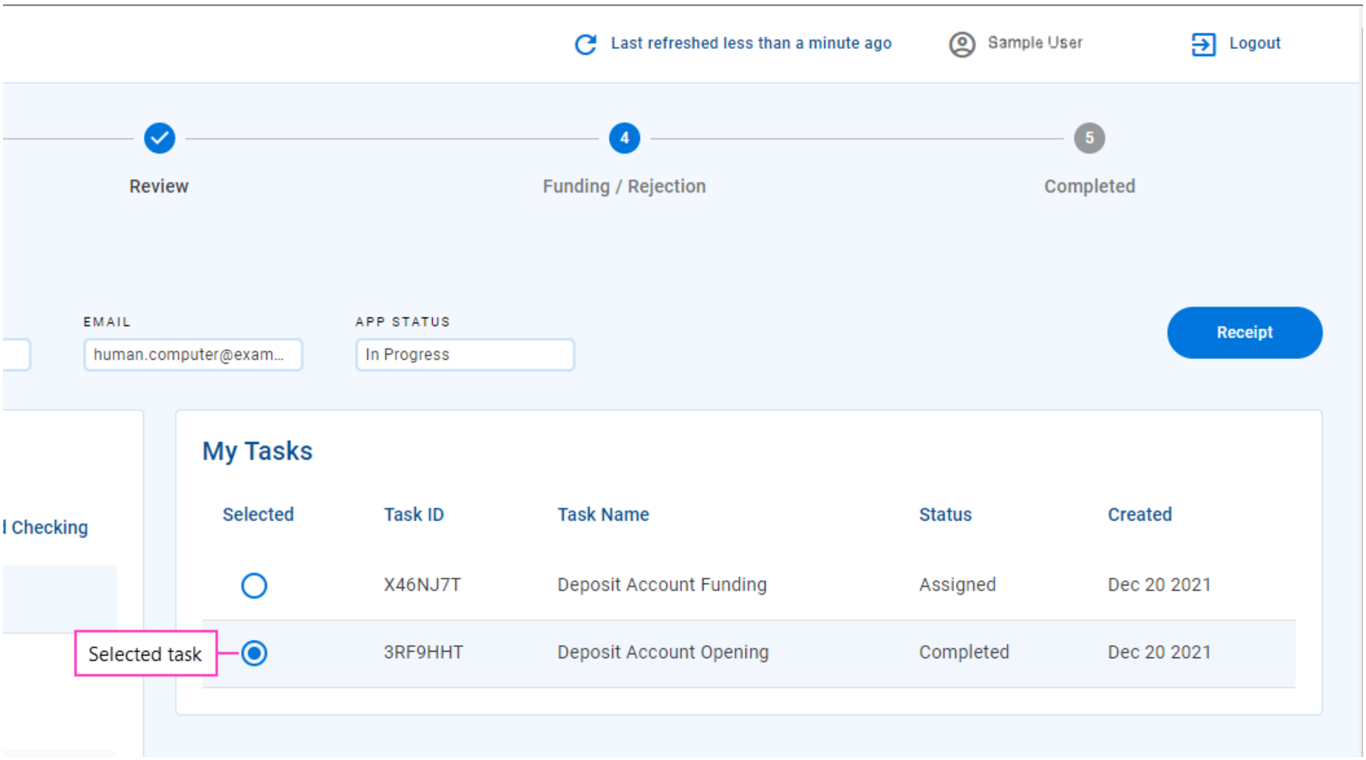


At the top of the card is an Applicants section listing all of the applicants associated with the application. This section displays key applicant-related information for each applicant including their name and email address. Select an applicant from this section to display more information for that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

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 Applicants 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 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.

Notes

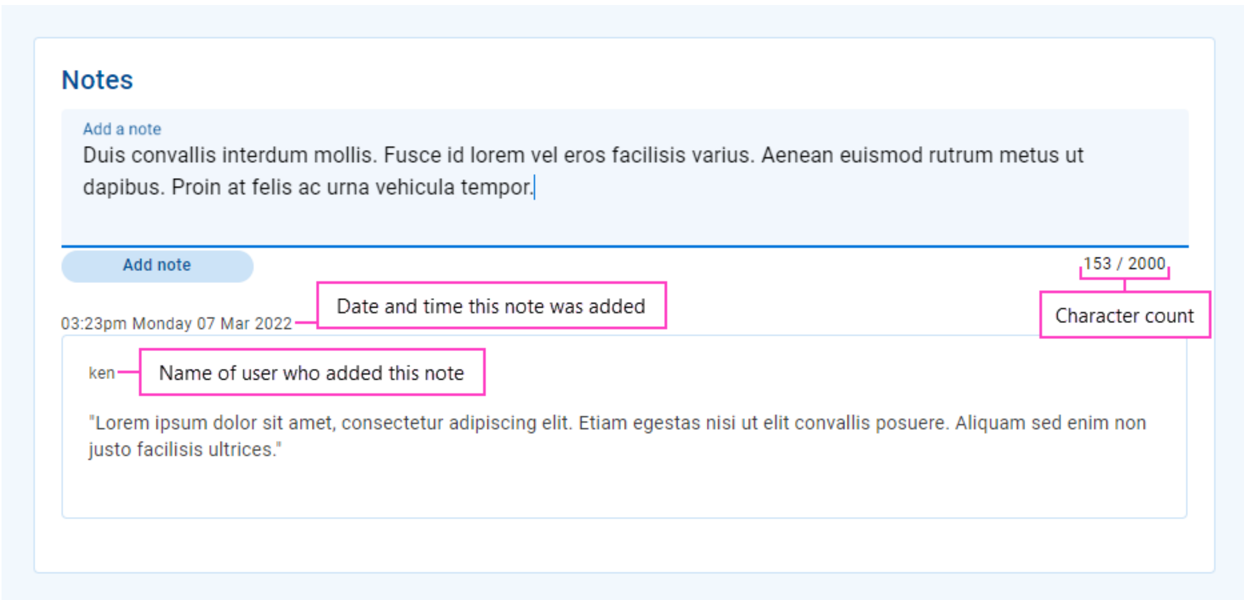
Throughout the life cycle of an application, there may be times when an applicant needs to provide additional information to the bank staff processing their application. Both Workspaces and the Applicants space support this kind communication.

In the Applicants space, applicants manage notes in the Notes card (1). To add a note, click the Add a note field (2) and enter your note text (3) then click Add note (4). Your new note appears below the Add a note field (5), and a message is displayed briefly in the bottom left corner confirming your note has been added (6).

INFO

A character count is displayed below the Add a note field and updated as you type in your note.

All of the notes for an application entered by the applicant are displayed in a list at the bottom of the Notes card with the newest at the top. The text for each note is accompanied by the date and time it was created and who added it.



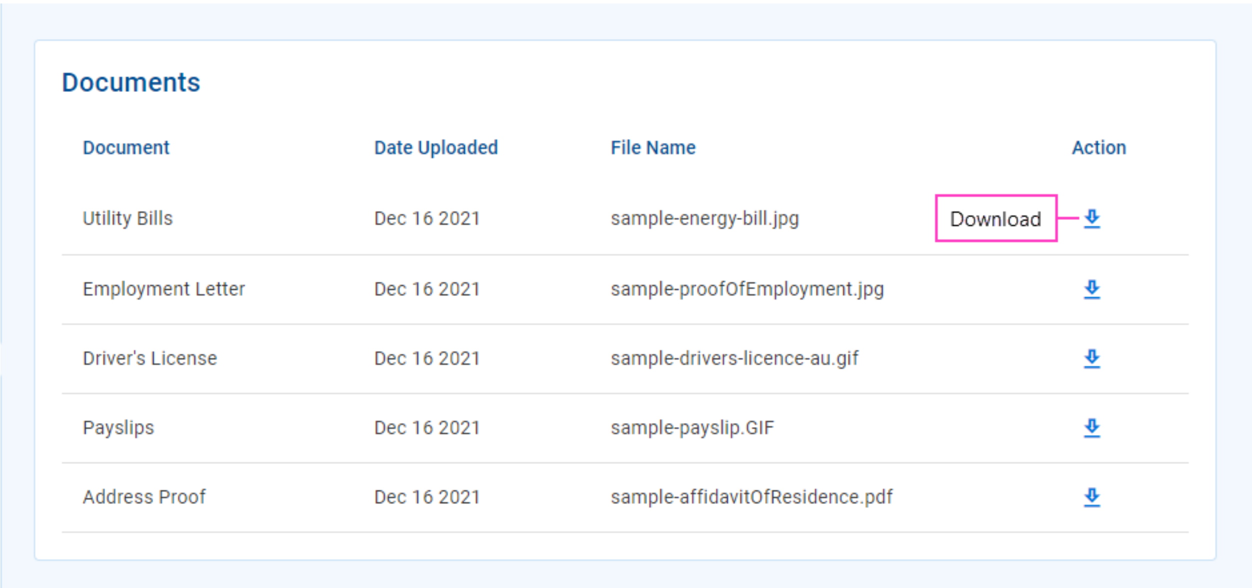
Both Workspaces and the Applicants space allow users to add notes to an application. Any notes added by the applicant appear in the Notes card, and can be viewed by bank staff in Workspaces via the View Notes action. However, notes added by bank staff in Workspaces cannot be viewed in the Applicants space.

My Documents

Applicants are often required to provide third-party evidence, such as a drivers license or an energy bill, which is use to verify the details they entered in their application. These documents are attached to the application, and made available to an Applicants 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.



Documents

Document	Date Uploaded	File Name	Action
Utility Bills	Dec 16 2021	sample-energy-bill.jpg	Download
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	

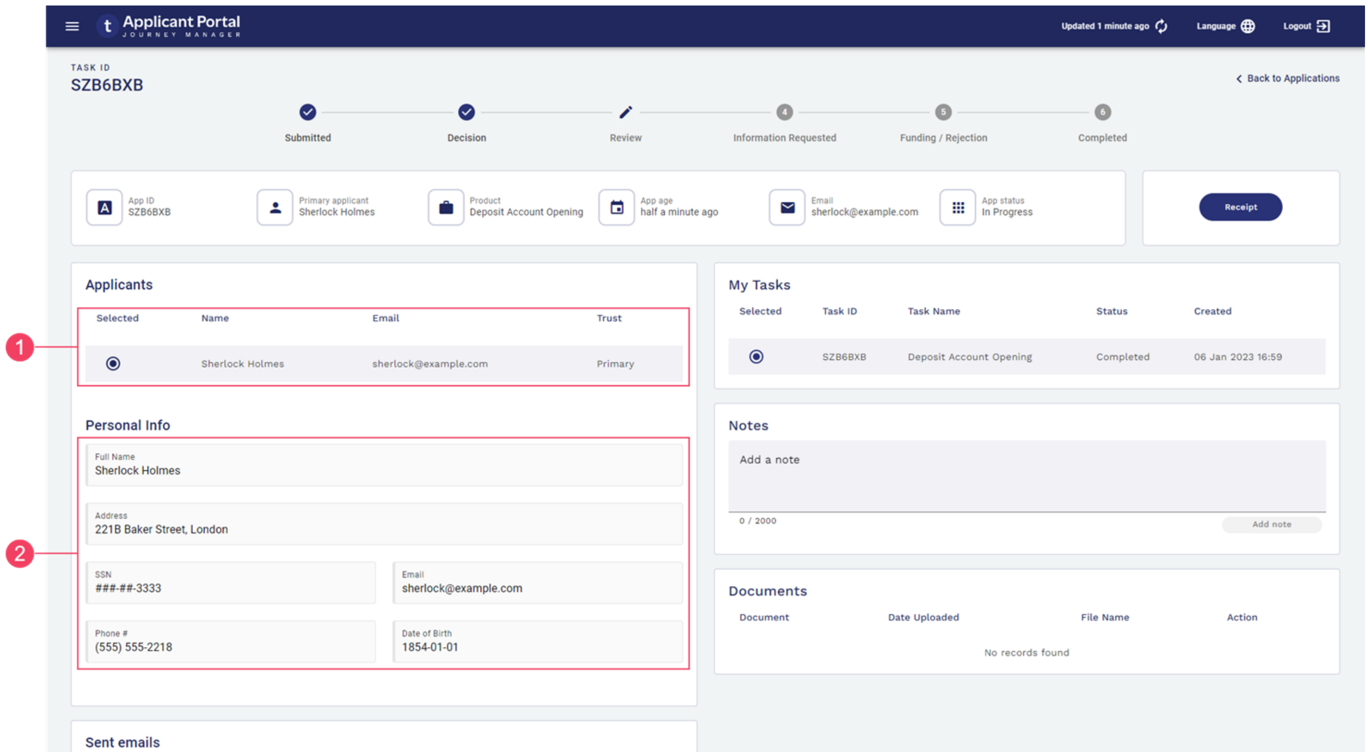
INFO

As an Applicants space user, the only document-related action you can perform is to download it. You cannot change the way documents appear on the Documents card, nor can you upload or manage documents attached to an application.

Custom Information

In addition to the standard information types described above, other information can be displayed using custom formats. Two formats are supported:

- **Multi-value:** Data is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different data item (identified by the column header), and each row is a set of related values. Each value is either a simple text/number display, or an icon that links to additional details or functionality. All values in the same column are of the same type.
- **Single-value:** Each data item in a tab, card or section is displayed separately, with a label, a value, and an optional icon that links to additional details or functionality. The personal information section uses this format.



1. Multi-value data
2. Single-value data

Several icon types are supported in custom information:

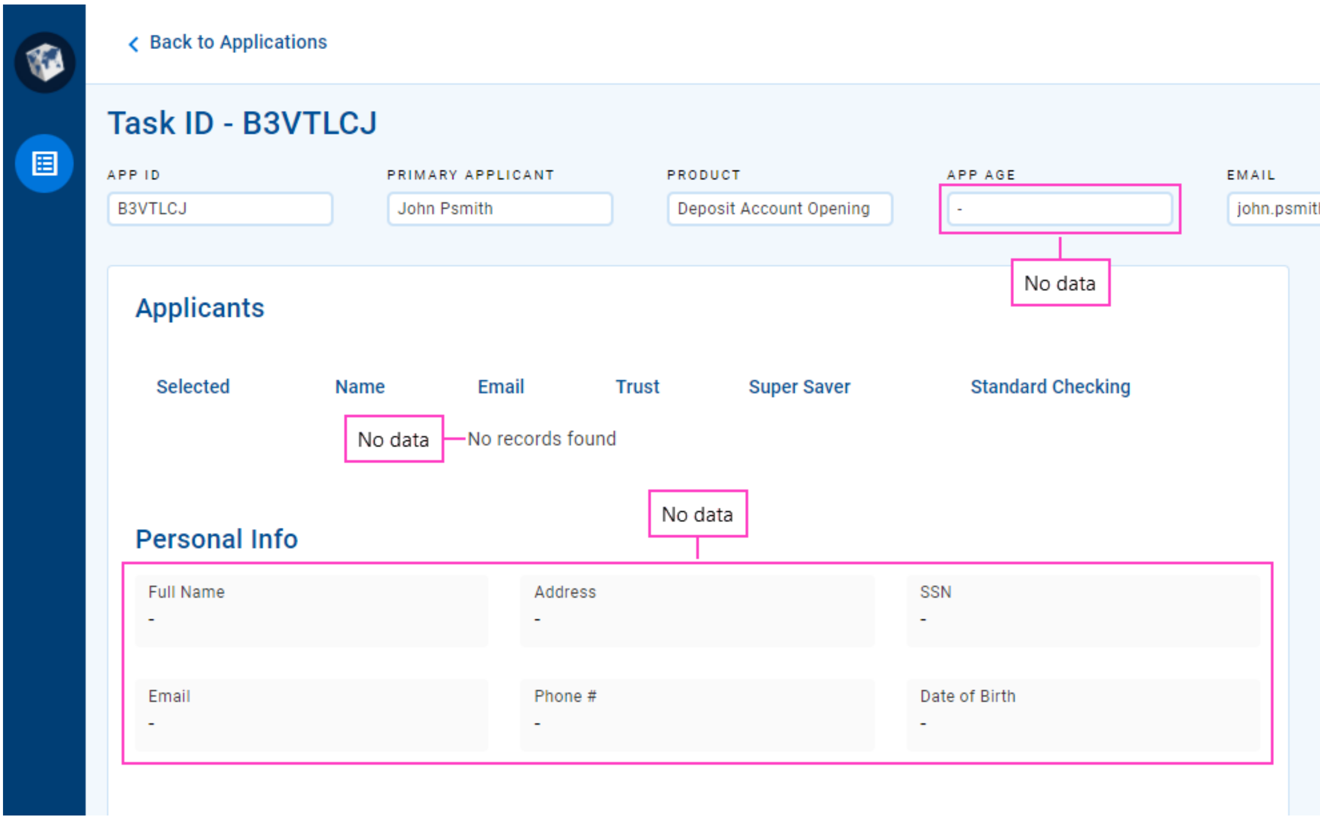
- **link (Detail Link):** Indicates additional details are available to view. Click the icon to display the additional details in a pop-up window.
- **vertical_align_bottom (Download):** Indicates the additional details are available to download. Click the icon to download the file containing the additional details. 21.11This feature was introduced in the 21.11 release
- Any other icon provides access to additional functionality. Click the icon to perform the associated action. 22.10This feature was introduced in the 22.10 release

INFO

Custom information presents a read-only view of a predetermined data set. An Applicants space user has no control over the way the data appears, nor can they modify the displayed information.

No Data Scenario

Sometimes, data may not be available in the Applicants 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 Applicants space from being able to obtain the data. The Applicants 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 Applicants space can also be configured to hide items with no data, so you may not even see fields or records with no data.

Applicants Space Actions

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

The standard actions in the Applicants space are:

- **New Application**: Start a new application in the Applicants 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.

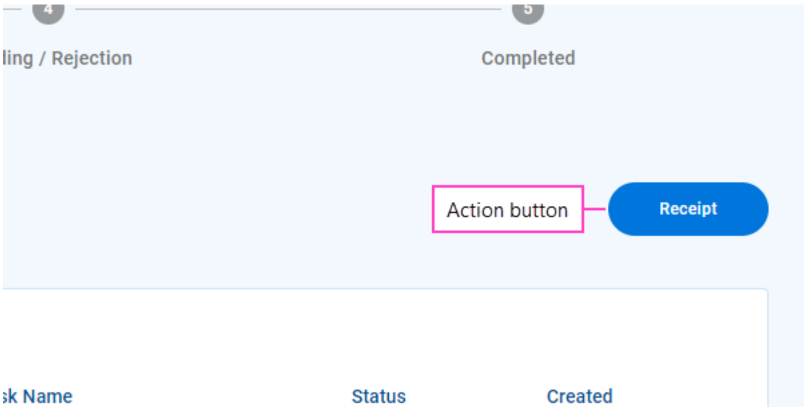
With the exception of New Application, all of these actions are available from the Details screen via the Action button to the right of the Key Info card.

NOTE

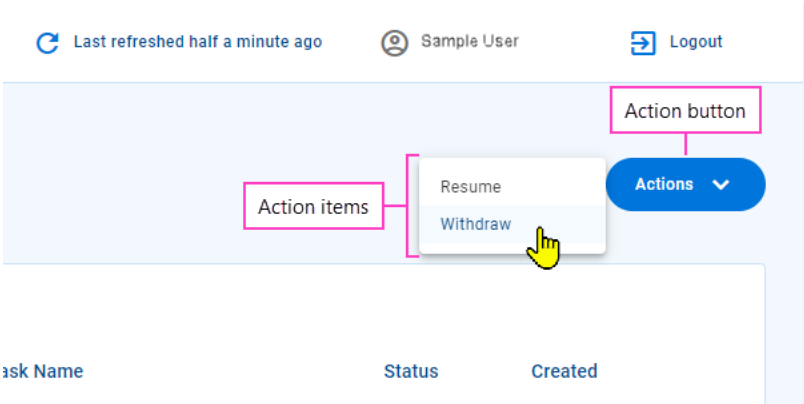
You can start a new application from the Search screen.

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.

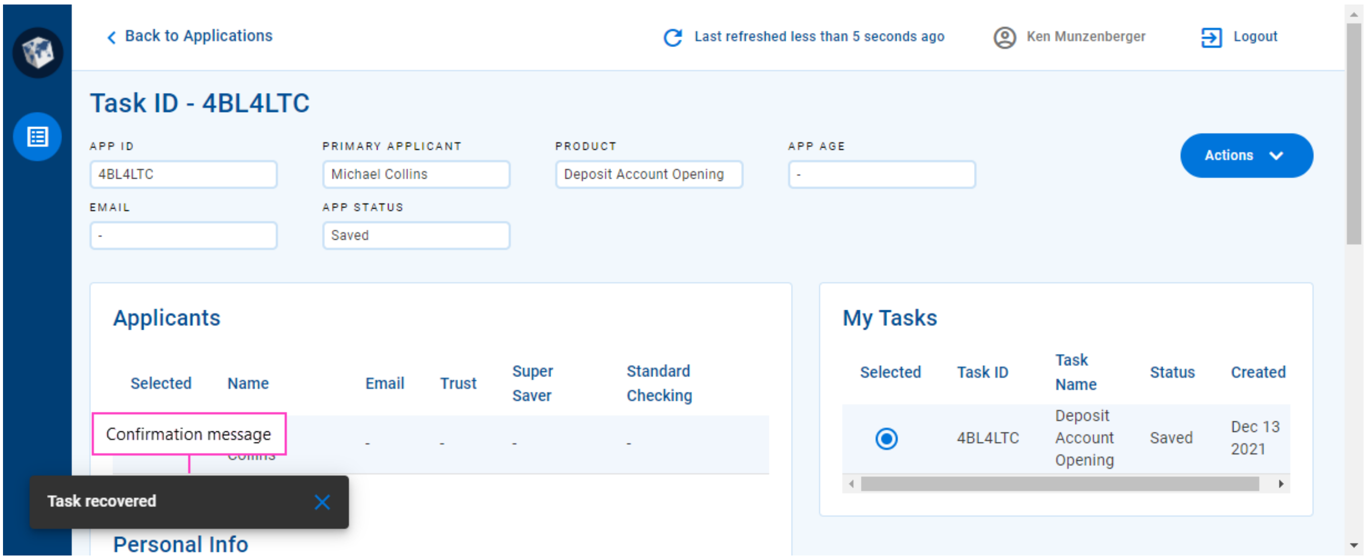


Different actions may be available for each task because the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Recover action will be available only for an application that has been abandoned.

NOTE

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

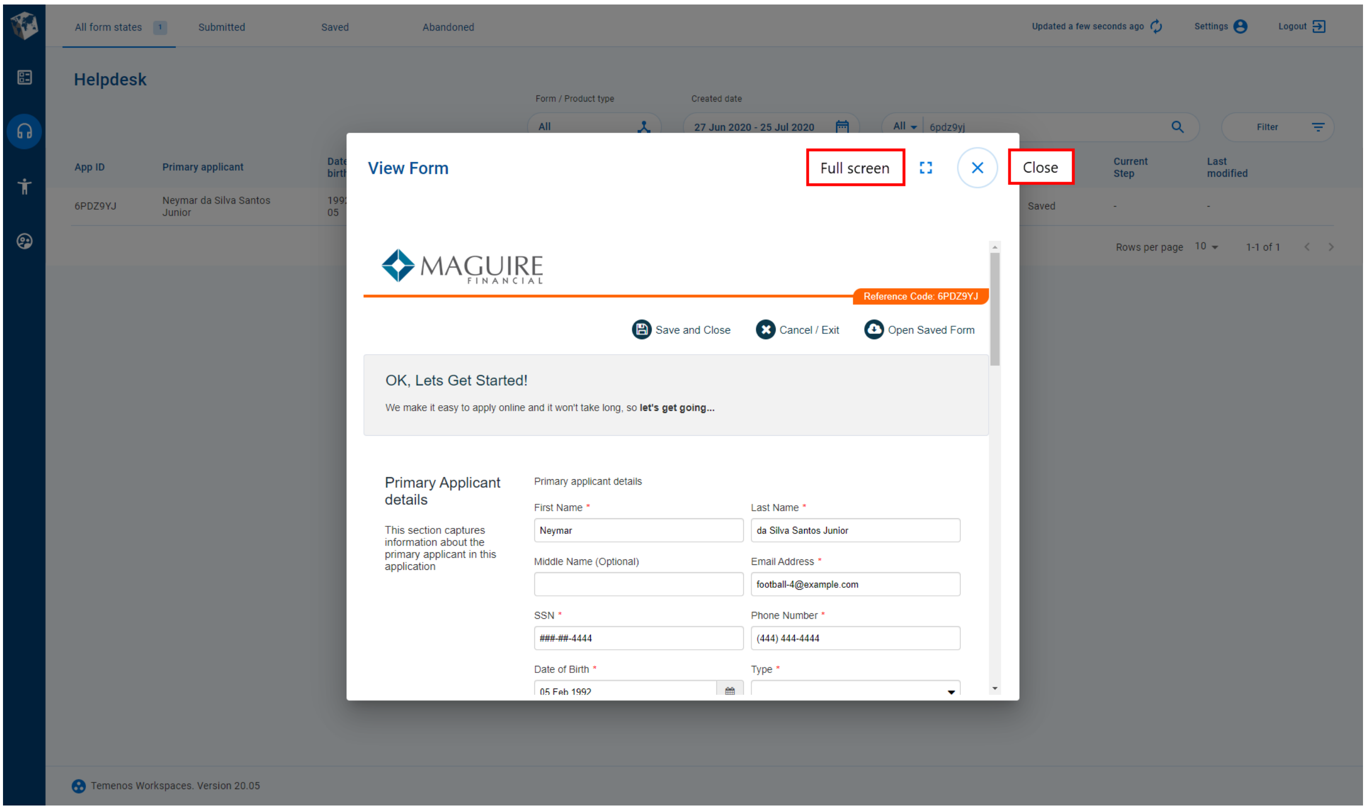


Resume an Application

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.

NOTE

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.

> NOTE
>
> 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.

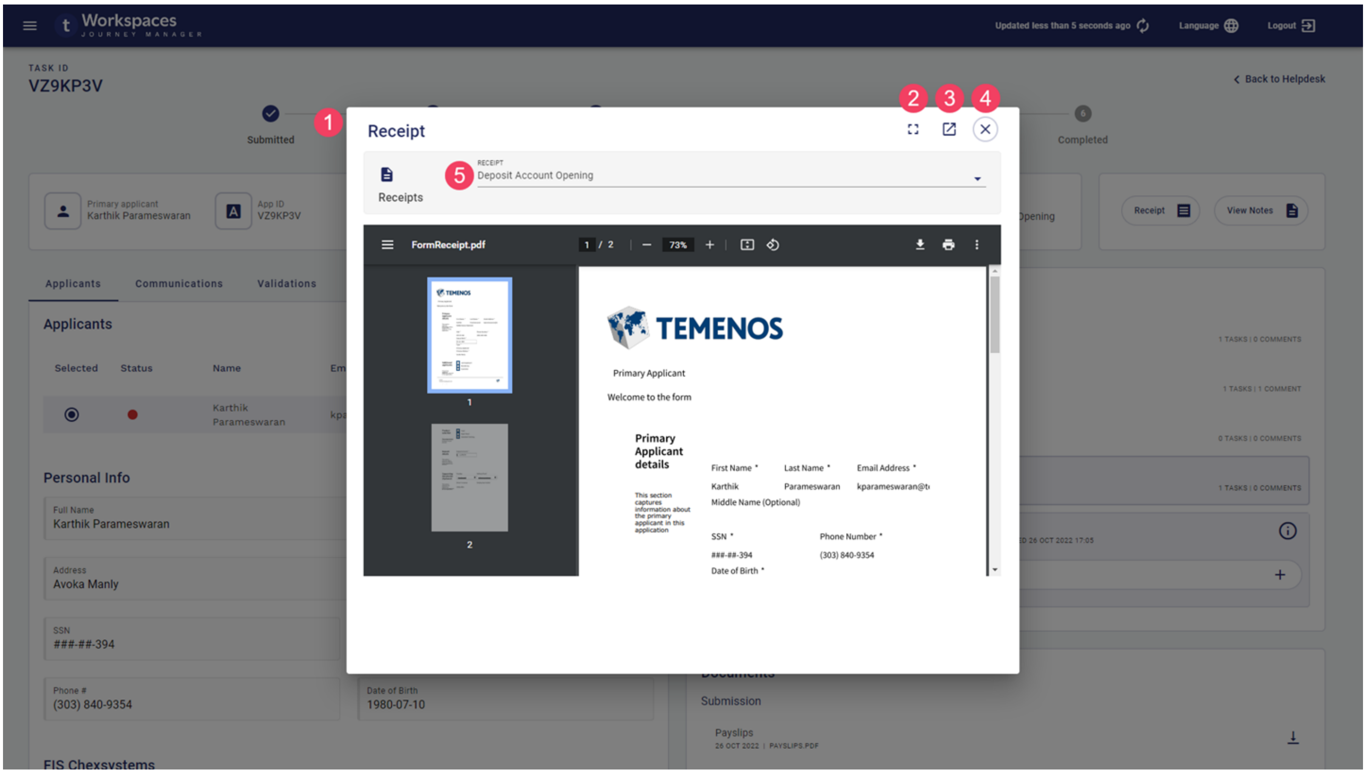
View a Receipt

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.

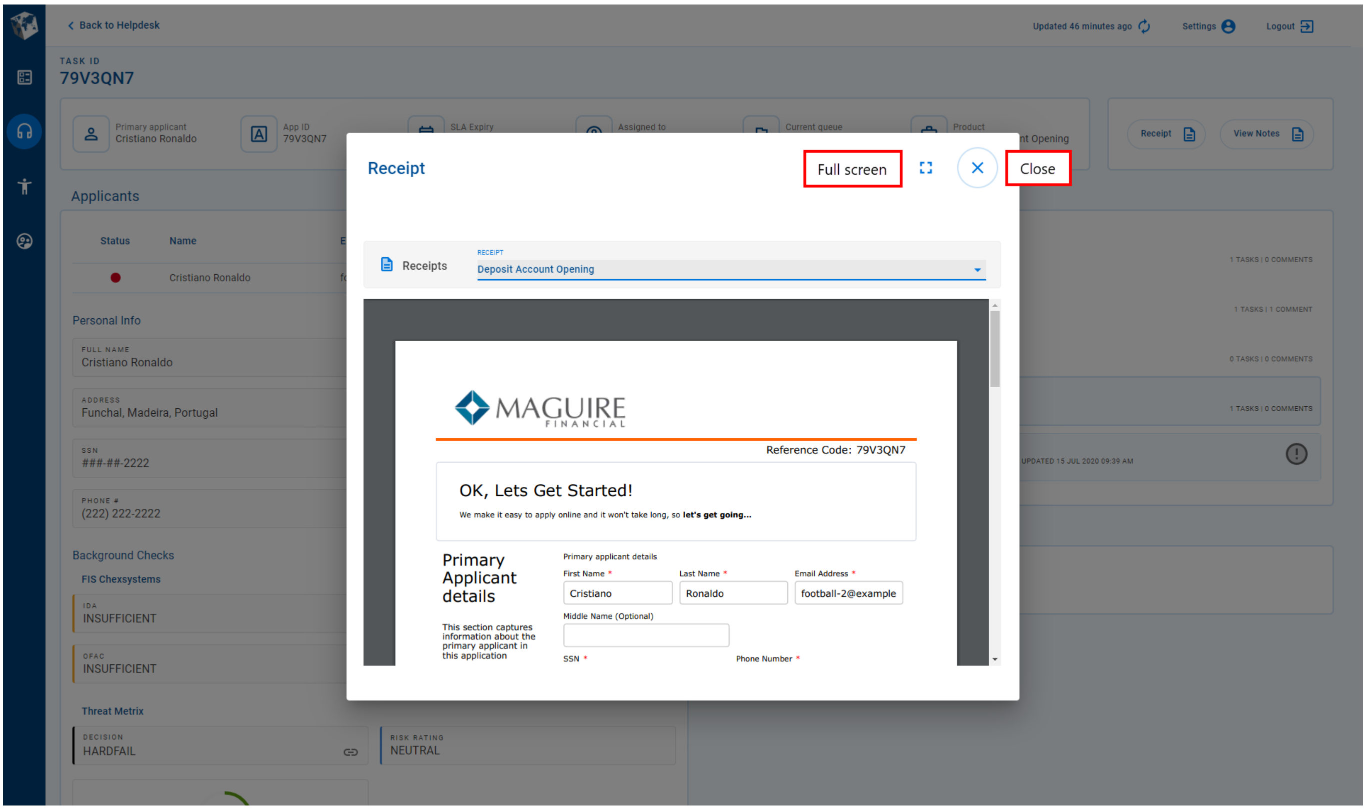
NOTE

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

- 22.10
- 22.04 and earlier



1. Modal window
2. Expand to full screen
3. Pop out to new tab
4. Close modal window
5. Receipt selector



A receipt is a read-only view of information submitted by an applicant or other Workspaces user, and displayed in the same form used to capture that information. You can view a receipt from any space, and for any item (application or task) even if it's not assigned to you. Each task associated with an application may have a receipt. If there are multiple receipts for an application, you can view a specific receipt using the Receipt selector at the top of the modal window. Note that viewing a receipt does not allow you to change the application in any way.

When you select the Receipt action, the receipt for the selected task is displayed unless there isn't a receipt associated with the task, in which case the most recent receipt is shown by default. However, if you're using Workspaces 22.04 or earlier, the most recent receipt is always displayed by default. | 22.10 This feature was updated in 22.10.

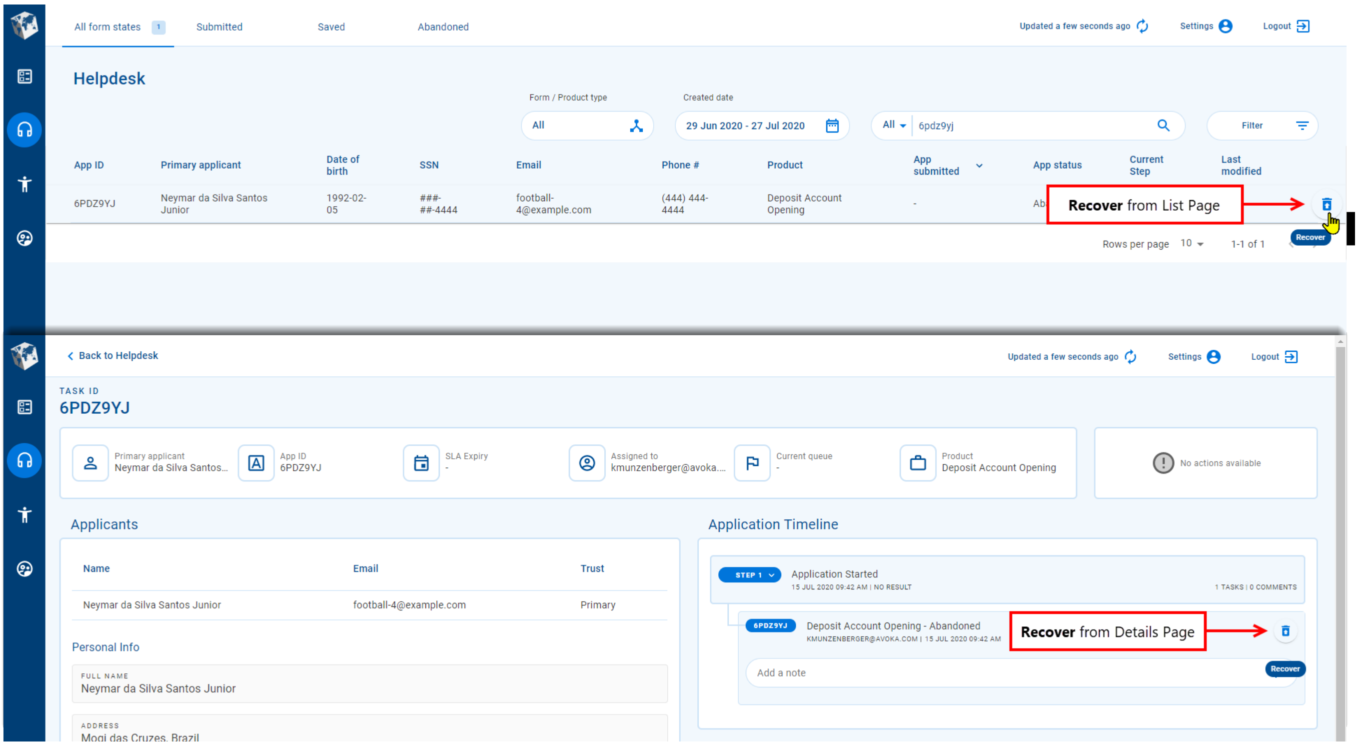
For more information about viewing receipts, see Receipt - View a Receipt.

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.

> NOTE
>
> 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.



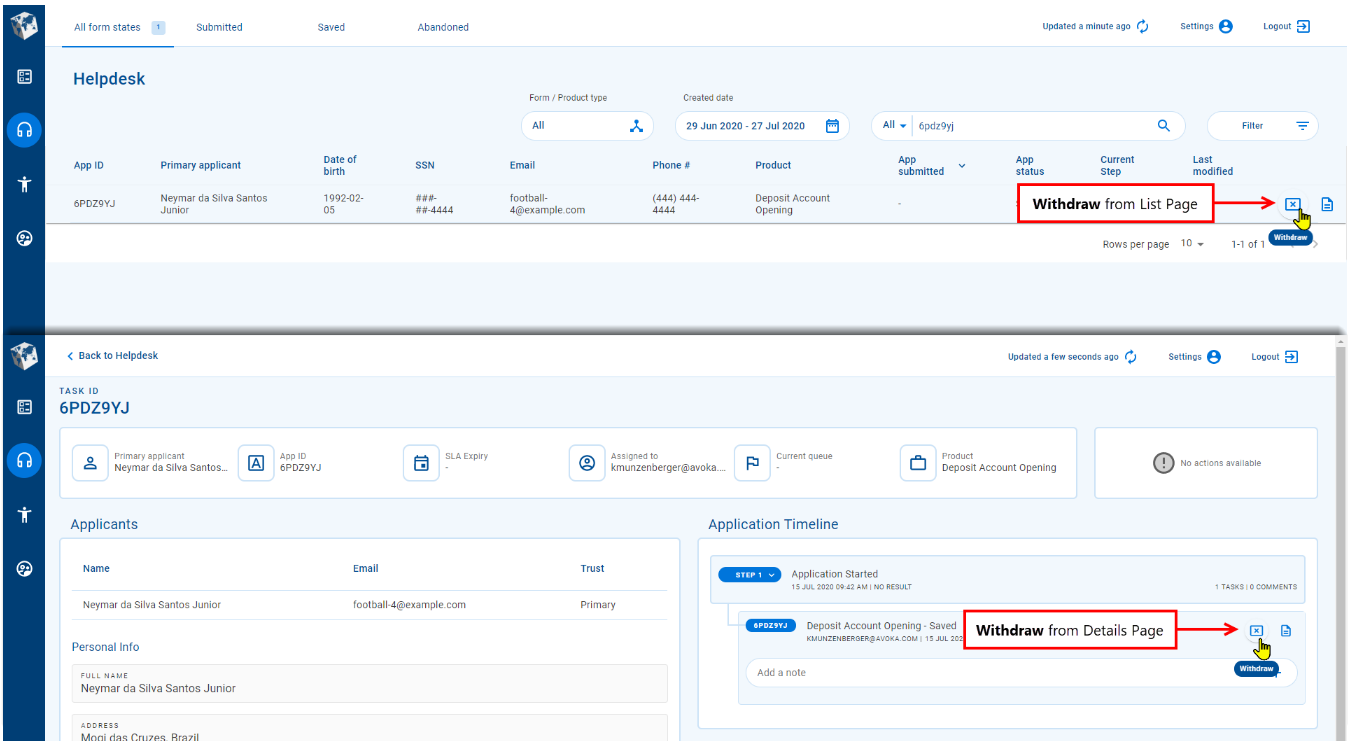
In addition to abandoned applications, an application that has been withdrawn can also be recovered.

For more information about recovering applications, see Recover 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.

Workspaces release compatibility

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 22.10This topic was updated for the 22.10 release

Each Temenos Journey Manager (TJM) release includes compatible versions of Journey Workspaces[1], Journey Manager[2] (JM), and the Workspaces REST API[3]. For example, the Temenos Journey Manager 22.10 release includes Journey Workspaces 22.10, Journey Manager 22.10, and the Workspaces REST API packaged with Journey Manager 22.10.

By default, Workspaces is designed to be both forward- and backward-compatible with Journey Manager and the Workspaces REST API in all TJM product suite releases. Nevertheless, some incompatibilities may arise; where known, these are identified below.

NOTE

To avoid any incompatibility issues, we **strongly recommend using Workspaces, Journey Manager, and the Workspaces REST API from a single release of the TJM product suite**.

CAUTION

If you have a specific need that requires deployment of Workspaces from one release with Journey Manager or Workspaces REST API from a different release, we **strongly recommend not mixing Journey Manager and Workspaces REST API releases**. This is because, it is highly likely that incompatibilities exist between Journey Manager and Workspaces REST API from different releases.

Generally, **more recent Workspaces releases haven't been tested with older TJM product suite releases**; in particular, recent Workspaces releases haven't been tested with TJM product suite

[1]Journey Workspaces is a business portal designed to support resolution and customer service activities related to account opening and onboarding.
[2]Journey Manager is a server application, deployed in the cloud or on-premise, that hosts forms, controls interaction with customers, calls on specialized services like identity verification or risk analysis and exchanges data with back office systems of record.
[3]The Workspaces REST API provides the integration with Journey Manager that Journey Workspaces needs.

releases that have reached end-of-life. While any combination of Workspaces, Journey Manager, and the Workspaces REST API from supported TJM product suite releases may be compatible, we recommend that you test any critical features when deploying a Workspaces release with Journey Manager or Workspaces REST API from a different TJM product suite release.

Supported releases

To learn about supported releases, see Temenos Journey Manager End-of-Life Policy.

INFO

Workspaces was not updated in the TJM 20.11 and TJM 21.05 releases.

Compatibility

The table below summarizes compatibility between supported Workspaces releases and Journey Manager and the Workspaces REST API included in supported TJM product suite releases. It is assumed that Journey Manager and Workspaces REST API are always from the same TJM product suite release. For example, if considering compatibility between Workspaces 21.11 and TJM 22.04, this is equivalent to considering compatibility between Workspaces 21.11, Journey Manager 22.04, and Workspaces REST API 22.04.

The table also identifies when the following release-related incompatibility issues are applicable. Additional detail about these incompatibility issues is available below.

- **CSRF token issue:** A TJM 21.05 or earlier environment upgraded to TJM 21.11 or later may be affected by a CSRF token implementation. For more information, see CSRF token issue.
- **New 22.10 features:** Some new features introduced in Workspaces 22.10 require Workspaces REST API 22.10. For more information, see Features that require Workspaces REST API 22.10.
- **TJM 22.04 breaking changes:** The Workspaces REST API packaged with Journey Manager 22.04 introduced changes incompatible with Workspaces 21.11 and earlier. For more information, see Breaking changes in TJM 22.04.

Workspaces release	TJM release compatibility	Incompatibility issues
22.10	Compatible with all supported TJM product suite releases.[1]	• CSRF token issue • New 22.10 features
22.04	Compatible with all supported TJM product suite	• CSRF token issue

Workspaces release	TJM release compatibility	Incompatibility issues
	releases.[1]	
21.11	• Compatible with all supported TJM product suite releases. • Compatible with Workspaces REST API 21.11 and earlier.	• CSRF token issue • TJM 22.04 breaking changes
20.05	• Compatible with all supported TJM product suite releases. • Compatible with Workspaces REST API 21.11 and earlier.	• CSRF token issue • TJM 22.04 breaking changes

1. Assumes Journey Manager and Workspaces REST API are from the same TJM product suite release.

CSRF token issue

After upgrading a TJM 21.05 or earlier environment to TJM 21.11 or later, you may be presented with an HTTP `403 Forbidden` status code when you attempt to access Workspaces. This is due to a CSRF token implementation. To learn more about this issue, including how to address it, see HTTP `403 Forbidden` status code when attempting to access Workspaces after upgrading from 21.05 or earlier.

Features that require Workspaces REST API 22.10

The following features introduced in Workspaces 22.10 require the Workspaces REST API 22.10 or later.

- Bulk actions
- Support for invoking fluent functions

Breaking changes in TJM 22.04

Changes to the Workspaces REST API introduced in TJM 22.04 (and retained in later releases) are incompatible with earlier Workspaces releases. Consequently, the Workspaces 19.11 application can no longer be used in a TJM 22.04 or later environment, and you must upgrade your Workspaces application to an Open UX form. For information about developing and deploying a Workspaces Open UX form, see Journey Workspaces form development and Form deployment and security.

Unsupported releases

Workspaces 19.11 and earlier releases have reached end-of-life and are officially unsupported. For more information about TJM product support, see Temenos Journey Manager End-of-Life Policy.

Compatibility

Workspaces 19.11 and earlier releases are only compatible with Journey Manager and the Workspaces REST API included in the TJM 21.05 and earlier releases. This is due to breaking changes in the JM security model and WAR file structure introduced in TJM 21.11.

A TJM 19.11 or earlier environment upgraded to TJM 21.11 or later may be affected by the CSRF token issue mentioned above.

Open UX form

Workspaces 20.05 replaced the Workspaces client application with an Open UX form. So, when upgrading a TJM 19.11 or earlier environment to TJM 20.05 or later, we recommend you migrate your Workspaces client application to an Open UX form. To learn more about developing and deploying a Workspaces Open UX form, see Journey Workspaces form development and Form deployment and security.

While we don't recommend a mixed-release deployment using a non-Open UX Workspaces client application in a TJM 20.05 or later environment, you can make this work if you really need to keep using a non-Open UX Workspaces client application. However, there are a few things you should know before proceeding down this path.

- To install a non-Open UX Workspaces client application, you need to download and import the Workspaces 19.11 WAR file into a TJM 20.05 or later instance.
- Importing the Workspaces 19.11 WAR file will also install the 19.11 version of the Workspaces REST API into your TJM instance, replacing any existing later version of this API.
- Consequently, you won't have access to any improvements introduced in later versions of the Workspaces REST API unless the Workspaces 19.11 WAR file is installed with a different name and context path .

Journey Workspaces FAQ

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 22.04This topic was updated for the 22.04 release

Compatibility

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

Deployment

- How do I promote Workspaces from lower to higher Journey Manager environments?
- How do I import the Workspaces WAR file through the Journey Manager administration console?
- How do I deploy two Workspaces portals in one Journey Manager environment?
- Can Workspaces 19.05/19.11 and Workspaces 20.05 be deployed to the same Journey Manager instance?
- Can I have multiple Workspaces 20.05 Open UX forms in a single Journey Manager instance?
- Can I deploy the Workspaces 19.11 portal in a TJM 20.05, 20.11, 21.05 or 21.11 environment?
- Can I deploy the Workspaces 19.11 portal in a TJM 22.04 or later environment?

Fresh installation of Workspaces

- When I login to Workspaces for the first time, I just see a progress bar continuously loading
- What Journey Manager roles and permissions are required to access Workspaces?
- What resources are required by Workspaces after a fresh installation?

Logging in to Workspaces

- Logging in to Workspaces while already logged in displays the login screen without any styling applied
- When I login to Workspaces again after logging out, an error page is displayed
- Can I login to Workspaces from two different browsers (multiple sessions) at the same time?
- HTTP 403 Forbidden status code

- HTTP 403 Forbidden status code when attempting to access Workspaces after upgrading from 21.05 or earlier
- HTTP 403 Forbidden status code after logging in to Workspaces

Configuration

- Can the Applicant card or Background Check card be removed from the Workspaces UI?
- Can the Timeline card or Documents card be removed from the Workspaces UI?
- How do I configure the views and table columns in the Workspaces List screen?
- How do I configure the Key info card in the Workspaces Details screen?
- How do I configure the actions to be displayed for each Workspaces space?
- How do I hide a step from the application timeline?
- How do I restrict a Workspaces user to view only certain spaces in the Workspaces application?
- Are job properties supported in the Workspaces configuration?
- Space icons in Workspaces 20.05 and later don't have labels

Workspaces Features

- When I try to change or reset my password, I can't enter my old password
- There's a duplicate form name in the Form / Product Type selector
- Can I hide the Search bar on the Workspaces list page?
- Does Workspaces support partial searches?
- Searching for a transaction is very slow when there is a huge volume of transactions in Journey Manager
- Is it possible to retain search and filter values throughout a user's Workspaces session?
- Filtering on more than two submission properties at once does not return the expected results
- I can't filter on an application's metadata after the application is completed
- I can't view certain transactions in Workspaces
- I can't view the PDF receipts - is this due to access restrictions?
- Does Workspaces 20.05 support role-based access to view custom cards?
- Is there a limit on the number of notes that can be added to a task or application in Workspaces?
- The Decision action button is still visible after the application is approved or rejected
- How do I pass the Workspaces locale to a form rendered in the Workspaces modal window (for example, the decision form)?

- How do I close the Workspaces modal window from a form rendered inside it (for example, the decision form)?
- If I start a form in the Workspaces Assisted Channel, can I hand it over to the customer / applicant to continue the journey?

Maestro Form

- The Decision form cannot read the SystemProfile property
- The Add documents button doesn't appear for applications that are not yet submitted
- Can I configure Workspaces so that Helpdesk users view saved forms in a read-only state?
- How do I configure Workspaces so that Assisted Channel users can fill out a Maestro form?

Journey Workspaces FAQ - Compatibility

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 20.05This topic was updated for the 20.05 release

Is Workspaces available for my browser version?

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

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

NOTE

Journey Workspaces support for Internet Explorer is discontinued. For details, see Update on TJM Support for IE11.

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 Journey 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 Journey Workspaces experience.

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

Starting with Transact Manager 18.11, a compatible Workspaces release is available for every Journey Manager / Transact Manager release. For example, Workspaces 18.11.0 is compatible with Transact Manager 18.11.0.

Check the release notes for your Workspaces version Workspaces 19.11.x , Workspaces 19.05.x or Workspaces 18.11.x to identify the correct version of Workspaces to use with your Journey Manager platform.

Starting with Workspaces 19.05, 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 20.05, 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 .

Journey Workspaces FAQ - Deployment

WorkspacesThis topic relates to Journey Workspaces | [Platform Developer] | 18.11This topic was introduced with the 18.11 release | 22.04This topic was updated for the 22.04 release

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.

> NOTE
>
> 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 18.11.3 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 20.05, 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.

NOTE

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 20.05, 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" content="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 Workspaces</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
```

NOTE

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 19.05/19.11 and Workspaces 20.05 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 19.05/19.11, make sure you select the Workspaces WAR file compatible with your Journey Manager version.

Can I have multiple Workspaces 20.05 Open UX forms in a single Journey Manager instance?

Yes, you can have multiple Workspaces 20.05 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"
        }
    }
}
```

Can I deploy the Workspaces 19.11 portal in a TJM 20.05, 20.11, 21.05 or 21.11 environment?

CAUTION

The 19.11 release reached end-of-life in late 2022 at which time official support for this release ended.

The short answer is "yes". However, **we don't recommend this mixed-release deployment**, and there are a few things you should know before proceeding down this path.

- A key step in any Workspaces deployment is importing a Workspaces WAR file into your TJM instance. Prior to the 20.05 release, the Workspaces WAR file contained both the Workspaces REST API, which provides necessary integration with Journey Manager, and the Workspaces client application. The 20.05 release removed the client application from the Workspaces WAR file, instead deploying the client application as an Open UX form using a command-line interface tool, and leaving just the Workspaces REST API in the Workspaces WAR file.
- When upgrading a TJM 19.11 instance to a 20.05 or later release, **we recommend you migrate your Workspaces application to an Open UX form**. However, if you want to continue to use a non-Open UX Workspaces application, you can download and import the Workspaces 19.11 WAR file into a TJM 20.05 or later instance. If you do this, the 19.11 version of the Workspaces REST API is installed into your TJM instance, replacing any existing later version of this API. Of course, this means you won't have access to any improvements introduced in a later version of the Workspaces REST API.
- This mixed-release deployment has not been tested for production deployment, so there is no guarantee it will work seamlessly.

Can I deploy the Workspaces 19.11 portal in a TJM 22.04 or later environment?

No. TJM 22.04 introduces changes to the Workspaces REST API that are incompatible with earlier Workspaces releases. To learn more, see Workspaces release compatibility > Breaking changes in TJM 22.04.

Journey Workspaces FAQ - Fresh Installation

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 20.05This topic was updated for the 20.05 release

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 18.11.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.

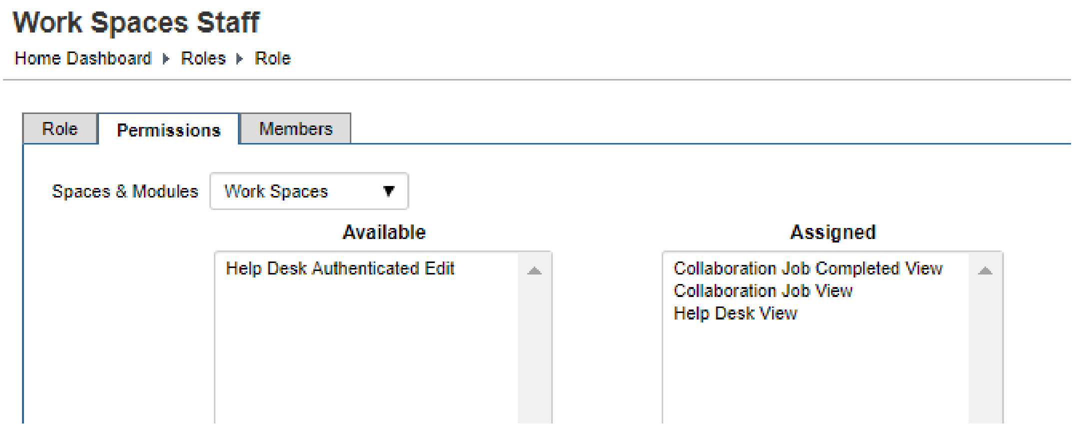
NOTE

Starting from Workspaces 19.05, 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 19.05 release.

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

From Workspaces 18.11.3, there is a strict permission check enabled in Workspaces as part of the security enhancement.

In Workspaces 18.11.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 19.05, 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.

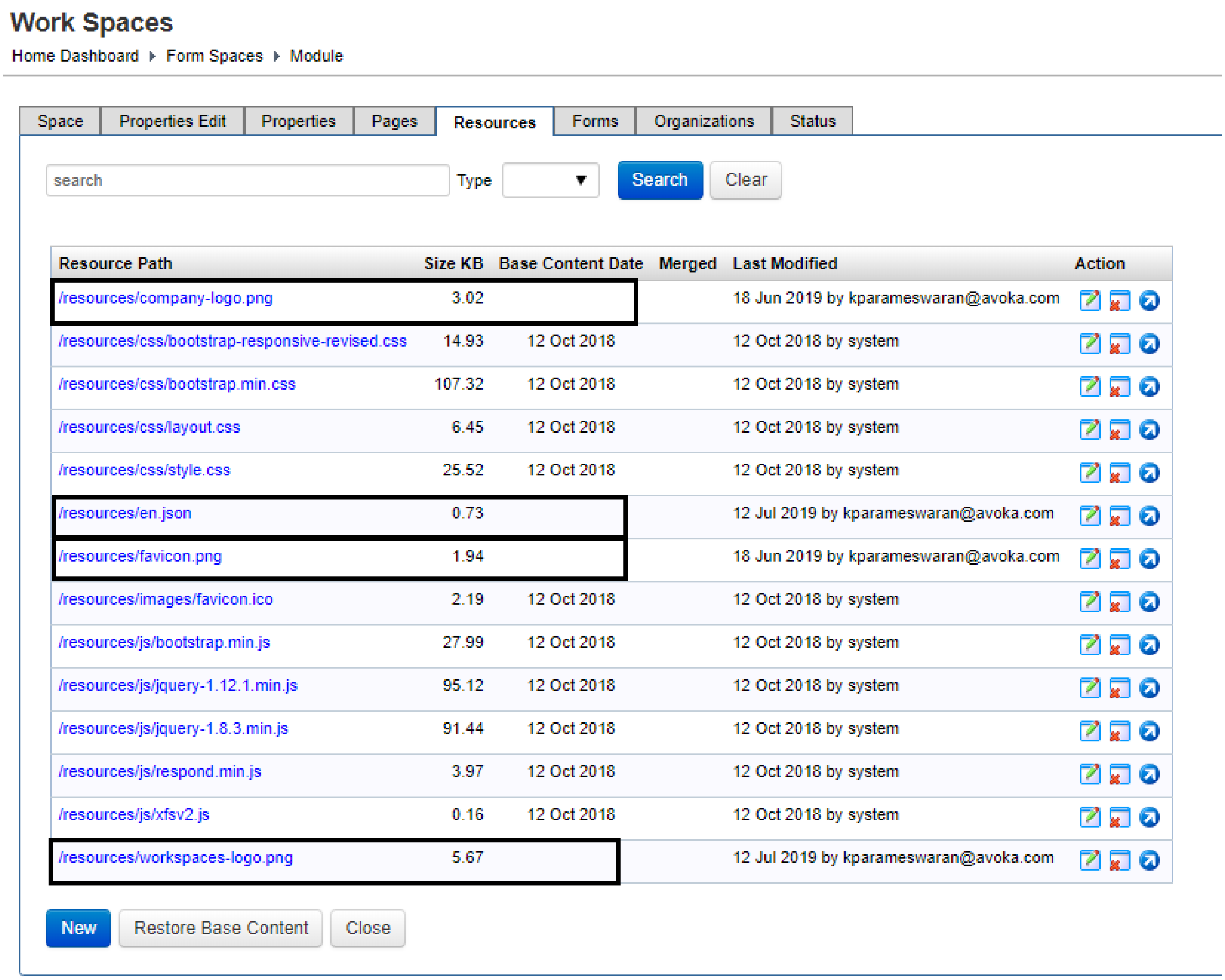
What resources are required by Workspaces after a fresh installation?

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

- 20.05
- 19.11 / 19.05
- 18.11

Starting from Workspaces 20.05, 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

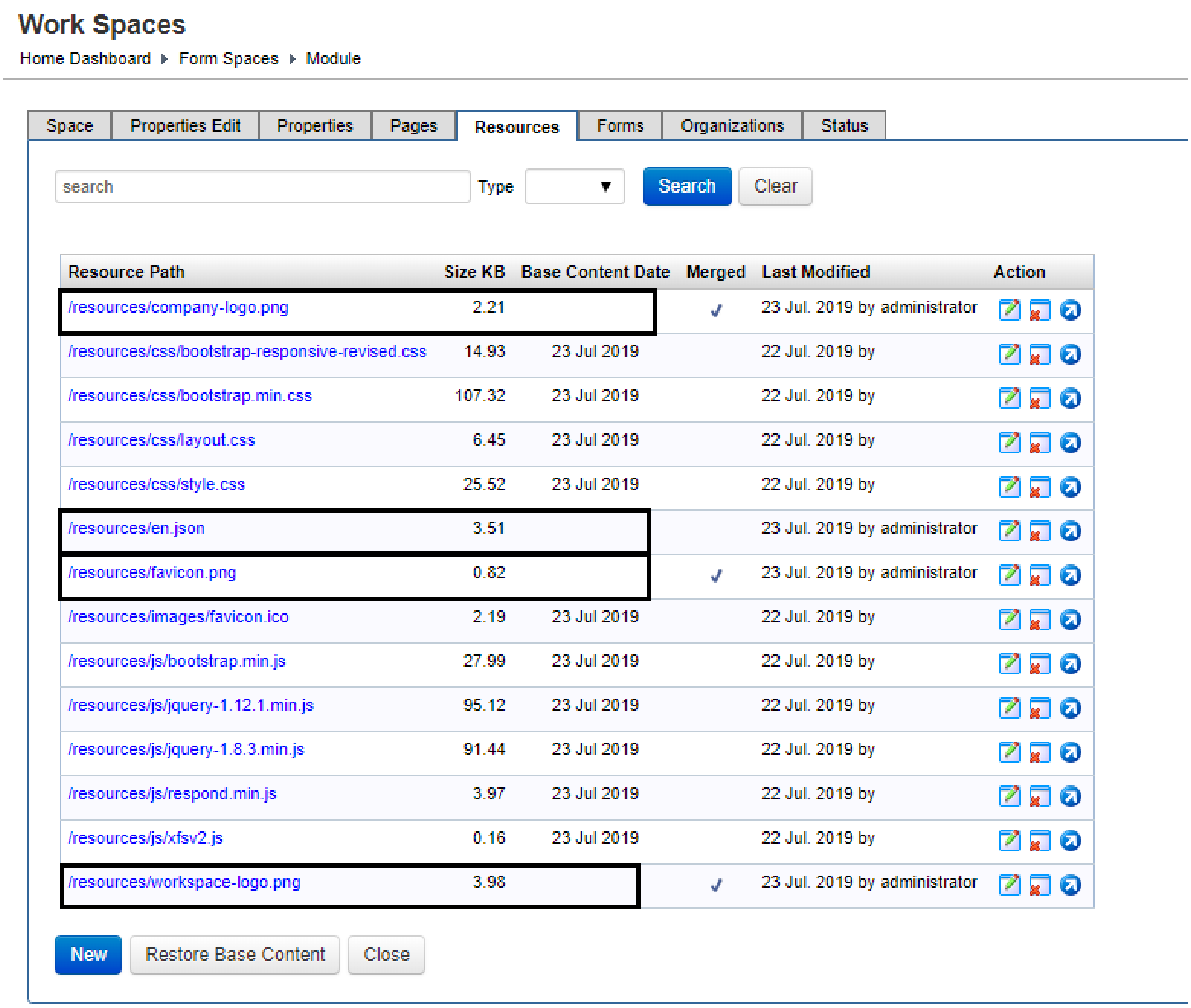


Resource Path	Size KB	Base Content Date	Merged	Last Modified	Action
/resources/company-logo.png	3.02			18 Jun 2019 by kparameswaran@avoka.com	
/resources/css/bootstrap-responsive-revised.css	14.93	12 Oct 2018		12 Oct 2018 by system	
/resources/css/bootstrap.min.css	107.32	12 Oct 2018		12 Oct 2018 by 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	

NOTE

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	

NOTE

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

Journey Workspaces FAQ - Configuration

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 22.04This topic was updated for the 22.04 release

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 19.11, 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 screen?

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

Supported releases	Unsupported releases
Configure views in Workspaces 22.10	Configure views in Workspaces 19.11
Configure views in Workspaces 22.04	Configure views in Workspaces 19.05
Configure views in Workspaces 21.11	
Configure views in Workspaces 20.05	

How do I configure the Key info card in the Workspaces Details screen?

This feature was introduced in Workspaces 19.05. Click one of the links below for more information about how to configure the Key Info card in the WorkspacesDetails screen.

Supported releases	Unsupported releases
Configure key info in Workspaces 22.10	Configure key info in Workspaces 19.11
Configure key info in Workspaces 22.04	Configure key info in Workspaces 19.05
Configure key info in Workspaces 21.11	
Configure key info in Workspaces 20.05	

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

This feature was introduced in Workspaces 19.05. Click one of the links below for more information about how to configure the actions available for each space.

Supported releases	Unsupported releases
Configure actions in Workspaces 22.10	Configure actions in Workspaces 19.11
Configure actions in Workspaces 22.04	Configure actions in Workspaces 19.05
Configure actions in Workspaces 21.11	
Configure actions in Workspaces 20.05	

How do I hide a step from the application timeline?

This feature was introduced in Workspace 19.05.

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 19.05.

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 20.05:** Access to spaces is controlled in TypeScript configuration. For details, see [Migration from v19.11 to v20.05 > spaces] in the Workspaces technical guide.
- **Workspaces 19.11:** 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 19.05** - 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 Workspaces configuration?

Starting with Workspaces 21.11, job properties are supported in the Global configuration. To learn more, see Mappings > Job Properties.

Prior to Workspaces 21.11, job properties were not supported.

Space icons in Workspaces 20.05 and later don't have labels

Workspaces 20.05 introduced some new design elements, including a change to the navigation rail and space icons. The nav rail is now slimmer, allowing more screen width for space content. As a consequence, space icons no longer include labels, so if you have spaces using the same icon that you previously differentiated by icon label, we recommend using different icons for your spaces instead.

Journey Workspaces FAQ - Logging in

WorkspacesThis topic relates to Journey Workspaces | Platform Developer | 18.11This topic was introduced with the 18.11 release | 21.11This topic was updated for the 21.11 release

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

This issue was fixed in Workspaces 19.11.

This issue affected Workspaces 19.05 and earlier.

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

This issue was fixed in Workspaces 18.11.4.

This issue affected Workspaces 18.11 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.

HTTP 403 Forbidden status code

There are several reasons why you may encounter an HTTP `403 Forbidden` status code when logging in to Workspaces. Some common scenarios are listed below. If none of these match your circumstances, try searching the Q&A forum. If you don't find what you're looking for, you can ask a question there. Alternatively, contact your Temenos representative for assistance.

- If you've recently upgraded a 21.05 or earlier environment to 21.11 or later, see HTTP 403 Forbidden status code when attempting to access Workspaces after upgrading from 21.05

or earlier.
- If you've recently changed a Workspaces configuration, HTTP 403 Forbidden status code after logging in to Workspaces may help you.

HTTP 403 Forbidden status code when attempting to access Workspaces after upgrading from 21.05 or earlier

After upgrading a Journey Manager 21.05 or earlier environment to 21.11 or later, you may be presented with an HTTP `403 Forbidden` status code when you attempt to access Workspaces. To fix this, you need to add the CSRF[1] token to the following Workspaces portal pages:

- Login
- Change Password
- Forgotten Password
- Two Factor Authentication Setup

Failure to add the CSRF token to these pages prevents users with valid credentials from passing login authentication.

To add the CSRF token to a Workspaces portal page:

1. Login to Manager
2. Select Forms > Form Spaces and click `Work Spaces`. For more information about form spaces, see View Form Spaces.
3. Select the Pages tab, locate the page to update, and click Edit. For more information about form space pages, see View Form Space Pages.
4. Add the following code to the page's content inside the HTML `<form>` element.

```
#if ( $csrfParamter )
    <input type="hidden" name="${csrfParamter}" value="${csrfToken}"/>
#end
```

5. Click Save.

Repeat this process for each page that needs to be updated.

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[1]Cross-site request forgery (CSRF), also known as one-click attack or session riding, is a type of malicious exploit of a website where unauthorized commands are transmitted from a user that the web application trusts.

HTTP 403 Forbidden status code after logging in to Workspaces

If you encounter an HTTP `403 Forbidden` status code when logging in to Workspaces, it could be related to an SSO setup using SAML-based authentication.

Unlike OAuth-based requests, a SAML authentication request does a `POST` on the Workspaces form URL which is configured in the Journey Manager console via the Work Spaces form space. Any `POST` request on Workspaces is redirected to `secure/index.htm` which needs to be configured with the Workspaces application URL.

To address this issue, ensure that `secure/index.htm` in the Work Spaces form space is configured to open your Workspaces form. Follow these steps.

1. In Journey Manager, select Forms > Form Spaces. The list of available form spaces is displayed.
2. In the list of form spaces, click Work Spaces, and switch to the Pages tab.
3. In the list of pages, click Index Secure, and select the Portal Page tab.
4. Ensure the code in the Page Content box is configured to open your Workspaces page; something like this:

   ```
   <html>
       <head>
           <meta http-equiv="Refresh" content="0;URL=/workspaces/app/FORM_CODE/FORM_
   VERSION" />
       </head>
   </html>
   ```

   If you make any changes, click Save.

5. Click Close.

NOTE

If the Work Spaces form space property CSRF Protection is enabled (which it is by default), a CSRF token is generated on initial authentication with the security manager, and any subsequent `POST` requests on the Workspaces application need to pass this CSRF token in the request header. However, if you're unable to retrieve the CSRF token to include it in the subsequent `POST` requests and it's deemed secure for your environment to not send it, you can disable CSRF Protection for the Work Spaces form space.

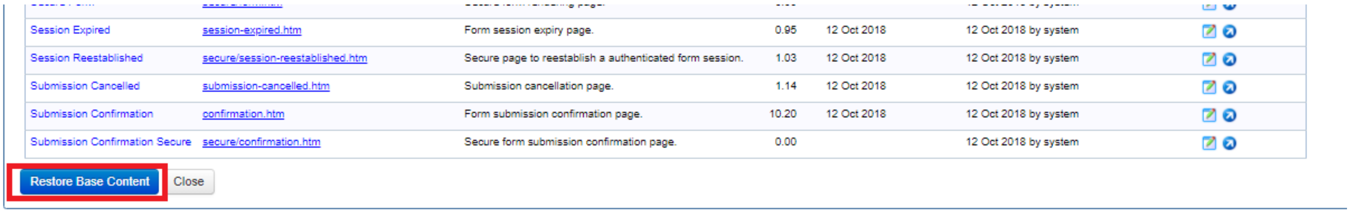
If you modify the CSRF Protection property, you must restart the portal for the change to take effect.

Journey Workspaces FAQ - Features

WorkspacesThis topic relates to Journey Workspaces | [Platform Developer]() | 18.11This topic was introduced with the 18.11 release | 20.05This topic was updated for the 20.05 release

When I try to change or reset my password, I can't enter my old password

This issue was fixed in Workspaces 19.11.7 / 19.05.9. 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.

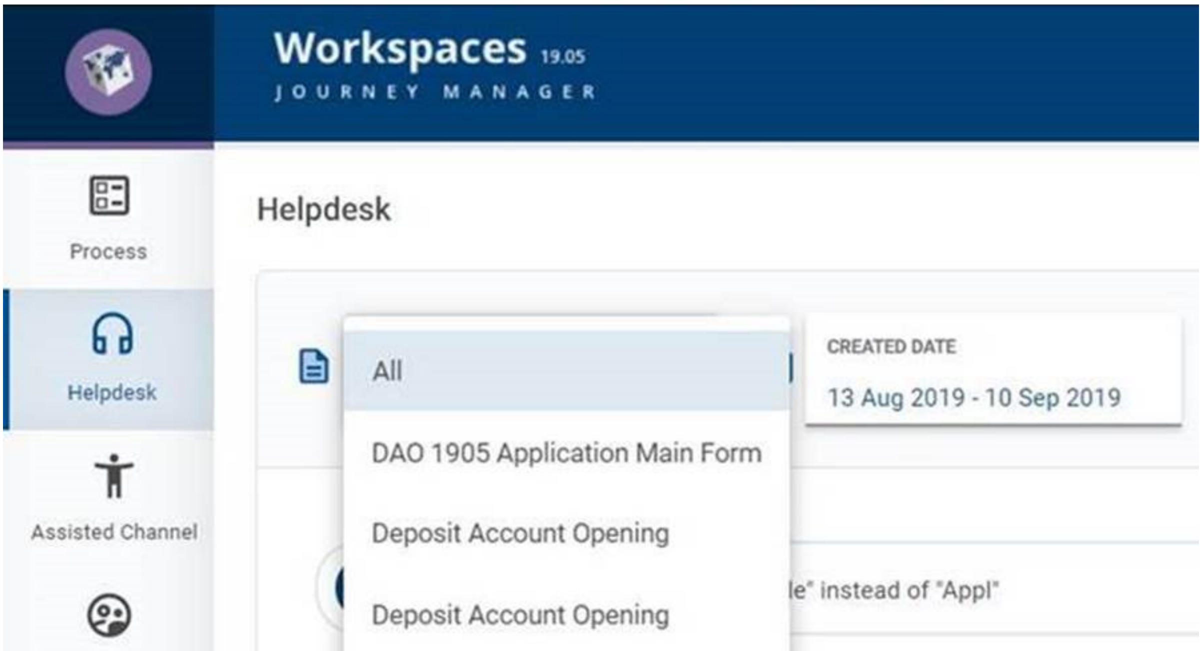


Session Expired	session-expired.htm	Form session expiry page.	0.95	12 Oct 2018	12 Oct 2018 by system
Session Reestablished	secure/session-reestablished.htm	Secure page to reestablish a authenticated form session.	1.03	12 Oct 2018	12 Oct 2018 by system
Submission Cancelled	submission-cancelled.htm	Submission cancellation page.	1.14	12 Oct 2018	12 Oct 2018 by system
Submission Confirmation	confirmation.htm	Form submission confirmation page.	10.20	12 Oct 2018	12 Oct 2018 by system
Submission Confirmation Secure	secure/confirmation.htm	Secure form submission confirmation page.	0.00		12 Oct 2018 by system

Restore Base Content Close

There's a duplicate form name in the Form / Product Type selector

The Form / Product Type selector displays the names of all forms in all organizations that you have access to. If the same form name exists in more than one of these organizations, you'll see that form name repeated.



Generally, this occurs only in edge cases such as training scenarios.

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 20.05, 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> …],
```

Does Workspaces support partial searches?

No, partial search is not supported in Workspaces. This is because searches are applied against stored data which is encrypted before being stored.

An alternative to partial search is to break a compound data field apart into separate fields that can be searched individually. For example, if your solution is configured with a **Full name** field composed of first and last names, configure it with searchable **First name** and **Last name** fields instead.

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 19.05.8 and Workspaces 19.11.6, and in all later versions. To improve search performance, add the “Enhanced PII Search” portal property and set it to true. For details, see Configure Workspaces Properties in the Workspaces technical guide.

Is it possible to retain search and filter values throughout a user's Workspaces session?

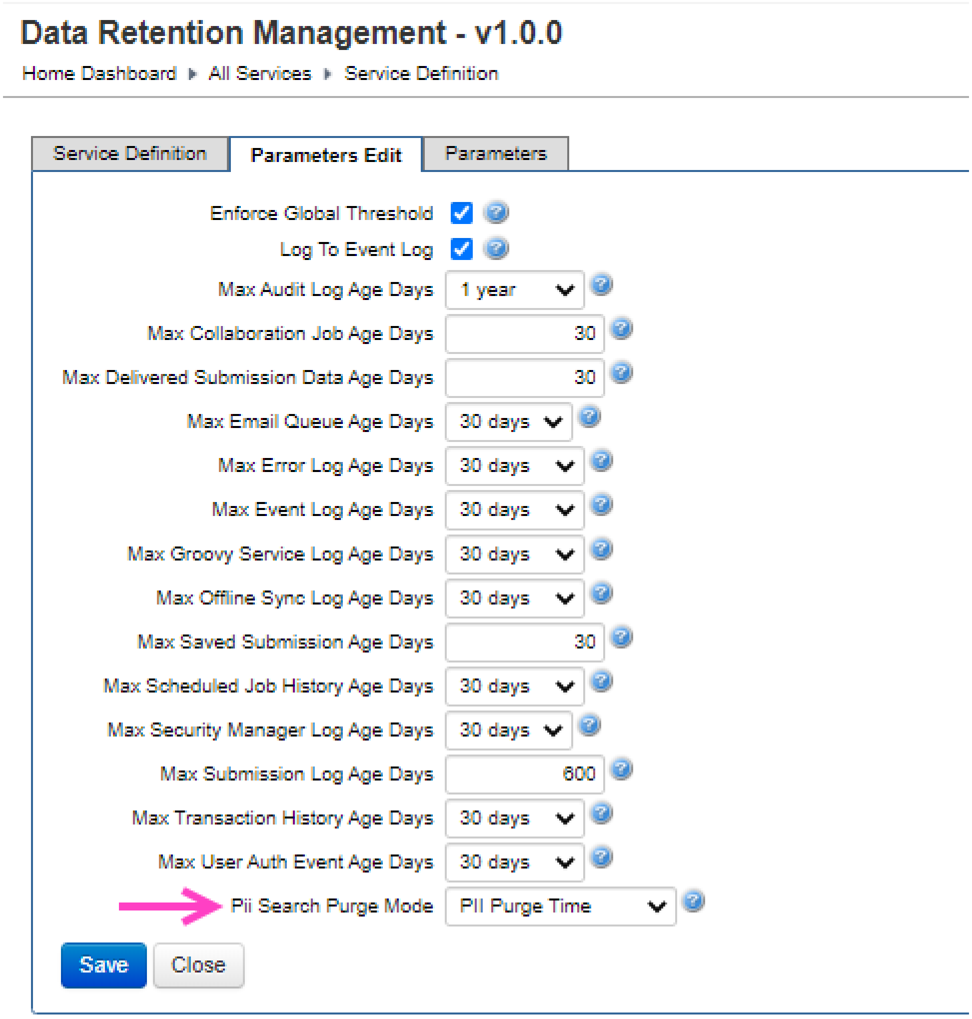
Yes, this is supported starting from Workspaces 20.05.

Filtering on more than two submission properties at once does not return the expected results

This is now supported in Workspaces 19.11. This issue affected Workspaces 19.05 and earlier.

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**.

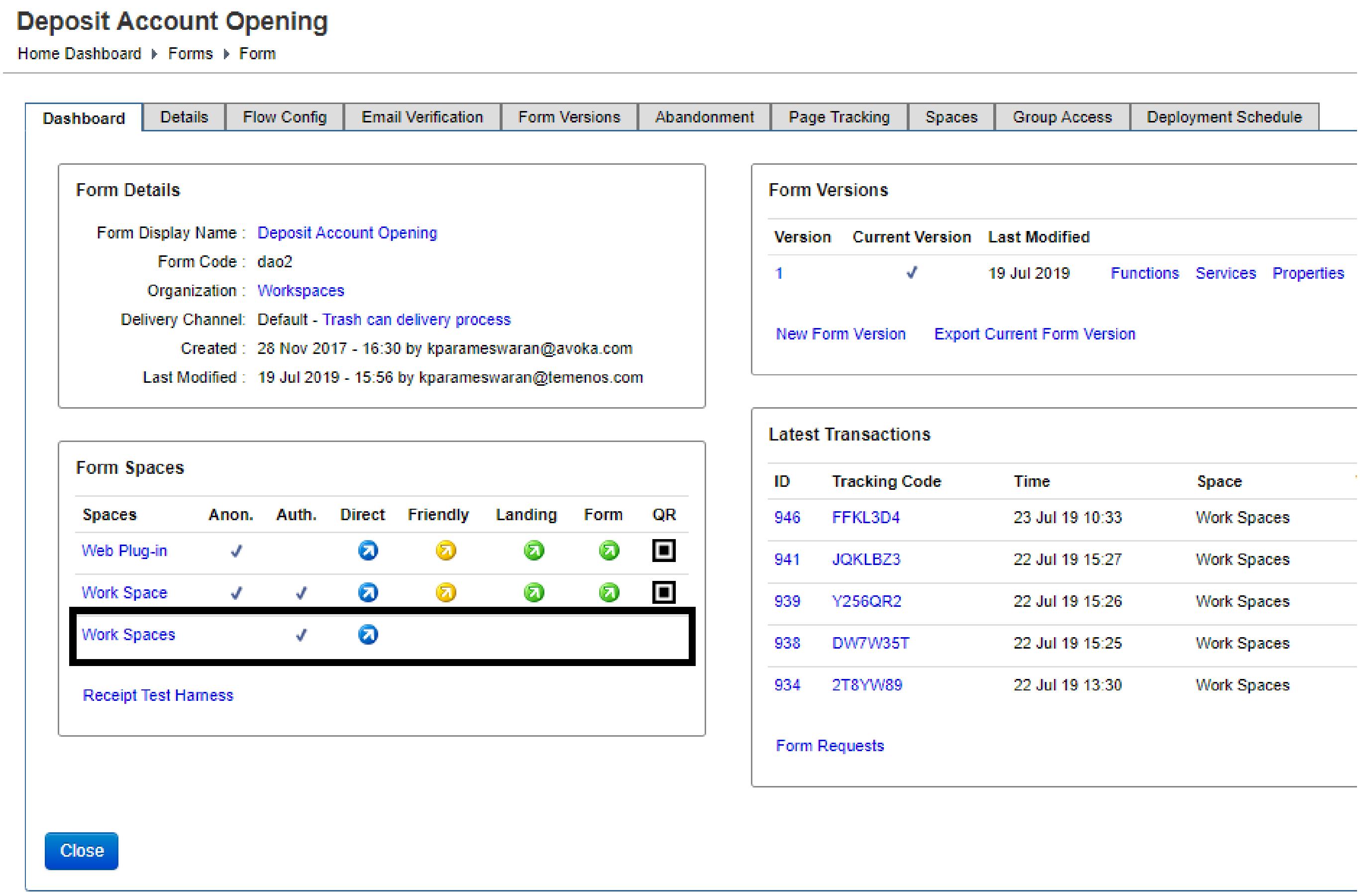


NOTE

Filtering on an application's metadata will work until the **PII Purge Time** is elapsed

I can't view certain transactions in Workspaces

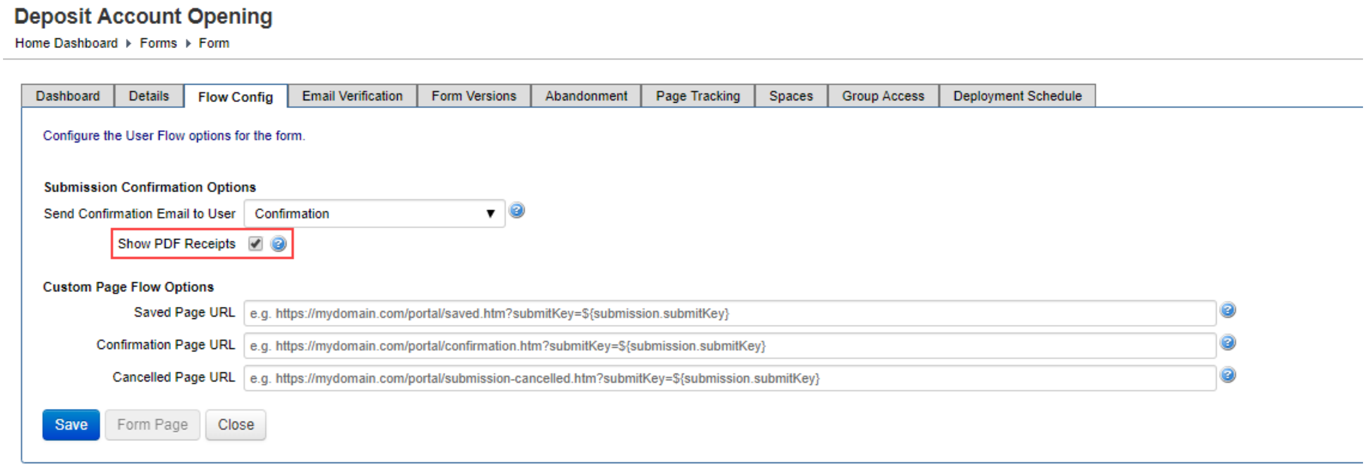
Make sure the form related to the transaction is linked to the "Work Spaces" form space in Journey Manager.



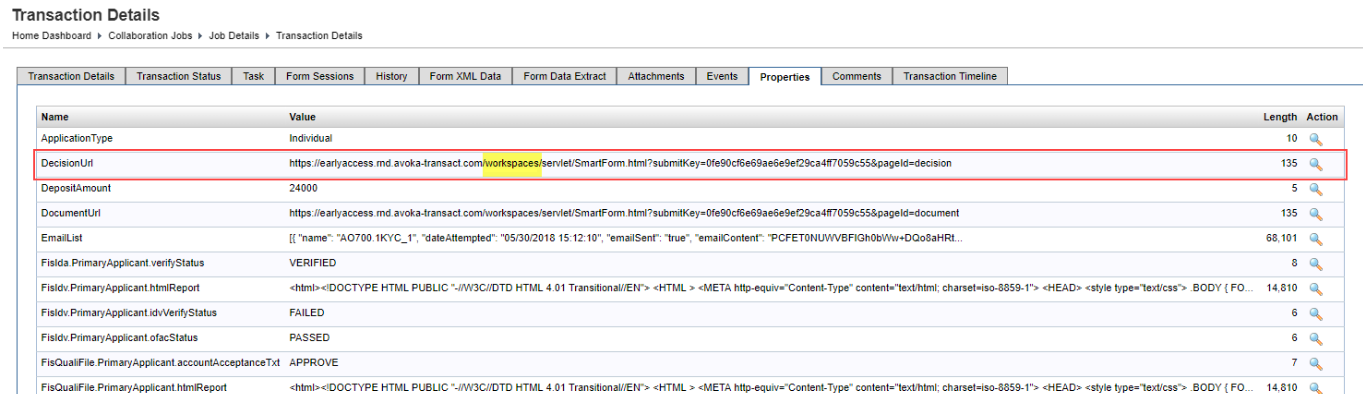
I can't view the PDF receipts - is this due to access restrictions?

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, see [Configure Receipts Delivery Mode](#).



In addition, if you are running Workspaces 18.11.x, make sure the `receiptUrl` property is present in the transaction's `submission` property and the context path is pointing to `/workspaces/`.



Does Workspaces 20.05 support role-based access to view custom cards?

Yes, Workspaces 20.05 supports role-based access control to view custom cards. For details, see Custom Cards in 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.

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 19.11.7. 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 19.11.7. To close the modal window from the form, use the following code in the form.

```
window.parent.postMessage({close: true}, '*');
```

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.

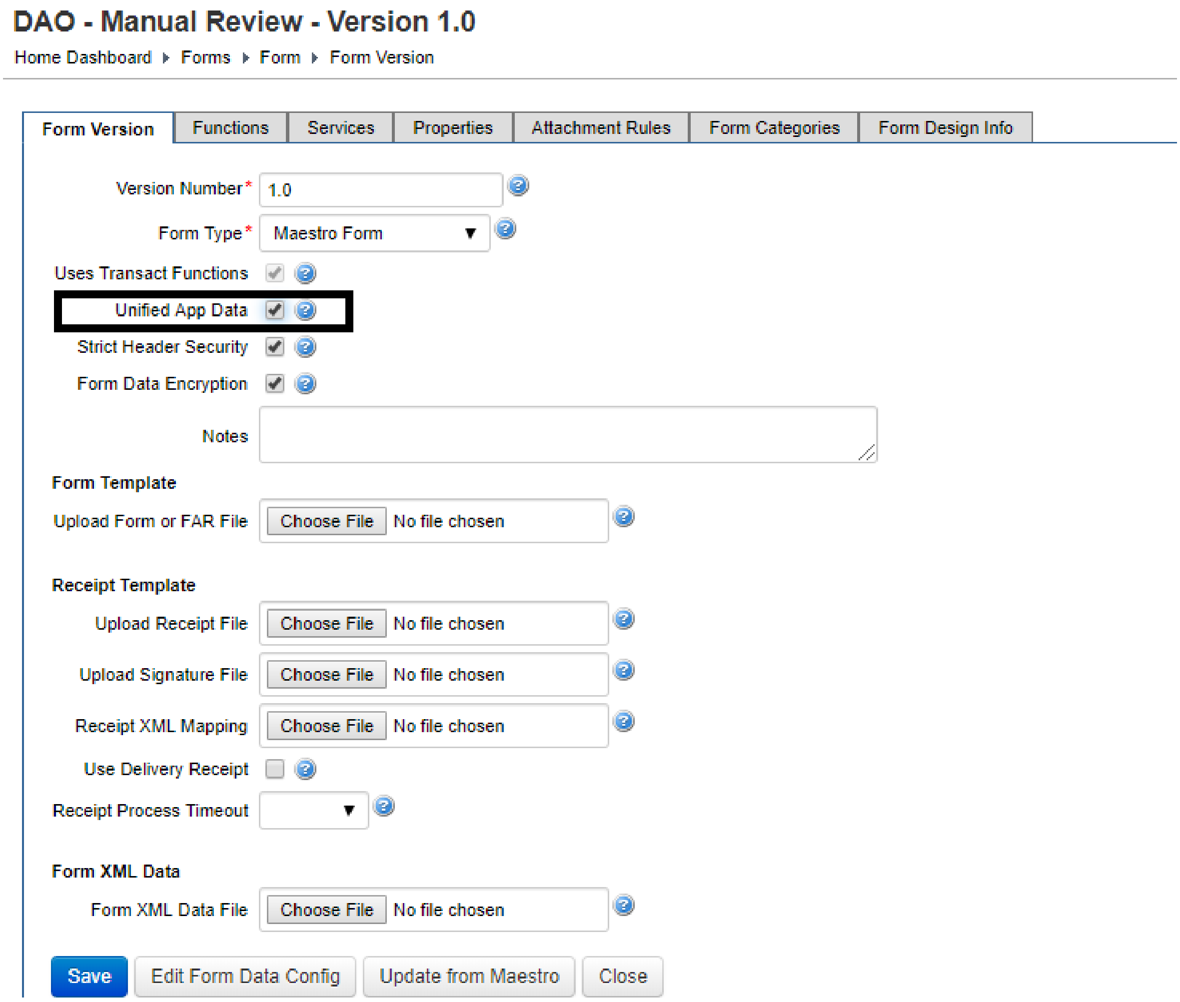
However, this can be achieved by breaking the application form into sections that are bundled with a collaboration job to manage the workflow.

Journey Workspaces FAQ - Maestro Form

WorkspacesThis topic relates to Journey Workspaces | [Platform Developer] | 18.11This topic was introduced with the 18.11 release | 22.04This topic was updated for the 22.04 release

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 19.11, 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 `&pageId=view` parameter in the URL while rendering the form.

Workspaces 19.11 now supports passing messages using the postMessage API. For details, see Actions in the Workspaces in the technical guide.

How do I configure Workspaces so that Assisted Channel users can fill out a Maestro form?

This feature was introduced in Workspaces 19.05.

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 22.04
- Configure this feature in Workspaces 21.11
- Configure this feature in Workspaces 20.05
- Configure this feature in Workspaces 19.11
- Configure this feature in Workspaces 19.05