temenos

# Workspaces

JOURNEY MANAGER

VERSION 24.04

# TOC

# Journey Workspaces Overview

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.

rate_review
**Processing Staff**

Review capabilities for pending applications that need manual action.

headset_mic
**Helpdesk Staff**

Enable support staff to find any application and provide assistance quickly and easily.

accessibility_new
**Assisted Channel Staff**

Assisted channel staff can kick start the application process and monitor progress.

supervised_user_circle
**Managers / Supervisors**

Task management capabilities for managers and supervisors.

Separate apps are available for other user types.

groups_2
**Journey Brokers**

An application management portal where authenticated non-bank users can create applications on behalf of applicants, handle follow-up requests, and monitor application progress. To learn more, see Journey Brokers overview.

person
**Journey Applicants**

An authenticated self-service portal for applicants, providing a secure way to monitor the progress of their own applications and perform any follow-up actions as part of the application process. To learn more, see Journey Applicants overview.

# 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.

- 24.04
- 23.10
- 23.04
- 22.10
- 22.04
- 21.11
- 20.05 (EOL)

- [19.11 (EOL)]
- [19.05 (EOL)]
- [18.11 (EOL)]

Key features included in this release:

- **Right-to-left (RTL) layout**

  Introduced support for an optimized right-to-left (RTL) UI experience that automatically adjusts screen contents for locales that use a right-to-left script.

- **iframe custom card**

  A new type of custom card for displaying web contents such as URLs, HTML, PDFs or other image types in an iframe within Workspaces.

- **Custom card action**

  The ability to call a custom action within a custom card that works like a global custom action.

- **Custom card enhancements**
  - Allow end users to copy text from list type custom cards using a new **Copy text** button.
  - Added support for rendering images within the custom card links.
  - Added support to set the status colours with “alert” type in custom cards.
- **Session expiry enhancements**
  - A new alert mechanism to prompt users about upcoming session expiry.
  - A new option to set the redirection URL upon session expiry.
- **Improved snackbar notifications**

  The ability to cascade multiple snackbar notifications when there are multiple messages to display.

- **Timeline stepper enhancements**
  - Support for rules to control whether certain steps appear in the timeline stepper.
  - Support for automatic filtering of steps based on their occurrence during the application processing journey.
- **Mapping field rules and permissions**

Added support for setting up mapping field rules and permissions which take effect in the item list table and key info sections in addition to custom cards (already supported). Supported components:

- **Permissions:** Item list table, Key info cards, custom cards
- **Rules:** Key info cards, custom cards

- **Enhanced mobile responsive design**

  Enhancements to support a fully functional sub-table layout within the item list table for mobile devices.

- **Accessibility improvements**

  Numerous changes to improve the accessibility of the Journey Applicants, Journey Brokers and Journey Workspaces applications.

- **UI configuration editor**

  (Experimental) A UI editor in the configuration app that offers an alternative to the JSON interface.

  **Note:** Currently, this feature is not enabled for all UI components.

- **Modal window improvements**
  - An optimized content viewing area.
  - An option to enable or disable the opening of forms in a new browser tab.

Key features included in this release:

Common features

- A full-fledged in-app configuration editor:
  - Edit the configuration in JSON format.
  - Store and retrieve the configuration for organization properties.
  - (Experimental) A code-free GUI configuration editor.
- Dynamic branding enhancements:
  - Set the theme from an organization property.
  - Apply brand to forms rendered through Workspaces.

Journey Workspaces

- SLA enhancements supporting fine-grained SLA definitions.
- Share a Workspaces details screen with other users.
- Extend standard action functionality using a fluent function call back.
- List screen table supports job source with collapsible table rows, allowing display of applications and tasks together.

Journey Applicants

- SMS- or email-based authentication (proof-of-concept only).
- Integration with Unblu for online assistance (proof-of-concept only).
- A mobile first design with many UI/UX enhancements.
- Custom card enhancements in the mobile experience.
- Accessibility improvements.

Journey Brokers

- MVP version for non-bank authenticated users (such as brokers).
- A responsive app, optimized for both desktop and mobile experiences

Key features included in this release:

- **Improved UI and UX:** Journey Workspaces and Journey Applicants have a fresh new user interface and improved user experience.
- **Table row expansion:** Expand table rows on the List, displaying additional information as a custom card.
- **Dedicated application and task panes:** An improved application details screen with dedicated panes for application- and task-level content.
- **New task switcher:** A new task switcher makes switching between tasks in an application seamless.
- **Consolidated notes:** A dedicated Notes card brings all notes added across an application together in one location.
- **Reply to notes:** A new comments feature lets users reply to any application note and view all the replies as a threaded conversation.
- **Simplified application timeline:** A streamlined application timeline feature that displays just the different stages of application progression.
- **Custom card enhancements:** Including:
  - Support for an alert icon on custom card tabs (`checkStatus` attribute)
  - Customize the link icon for invoking a fluent function
  - Tooltips for link icons in custom cards

    - Restored the numerical information display as a chart
    - Extended table cards support tables as a subsection
- **Error framework improvements:** The error reporting framework provides additional information about mapping field configuration errors.
- **Receipt improvements:** Improvements to the receipts data source to ensure Workspaces users can view receipts across the application.
- **Mobile responsive design:** A fully responsive Journey Applicants app for desktop and mobile in both landscape and portrait orientations.
- **Improved modal windows:** Modal window improvements include an optimized viewing area based on its content type.
- **Material icons:** Configuration now supports using any Material icons in Journey Workspaces and Journey Applicants.
- **Data source improvements:** Configure the Workspaces List screen using data from job properties in addition to the transaction metadata.
- **On-screen configuration editor:** Improvements to the **experimental** on-screen Workspaces configuration editor including a preview of changes.

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.

playlist_add_check**Improved build and deployment process**

An improved build and deployment process for Workspaces is now available from the Product Artifactory.

apps**Applicant Space template**

A fully configurable workspace for authenticated non-bank users to manage the application journey.

edit_attributes**Support for Job Properties**

Support for configuring the Key Info card and custom cards using the application's job properties.

language**Localization improvements**

Support for switching the language within Workspaces, and other minor enhancements to the localization framework.

search**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

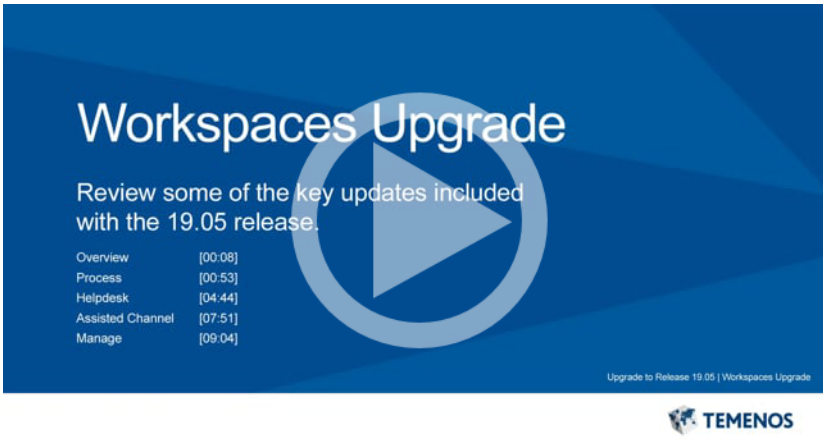
An enhanced view configuration extending control over line wrapping in data tables.

### Enhanced documents panel

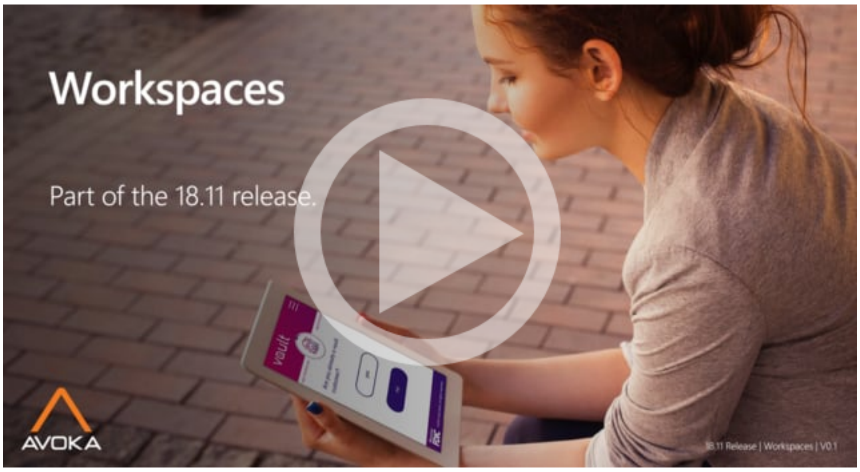
Attachment name is now included for each item in the Documents panel.

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.


Workspaces
Part of the 18.11 release.
AVOKA
18.11 Release | Workspaces | V0.1

# Journey Workspaces features

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.
- **Document requests:** Bank staff can ask an applicant to upload required documents that support their application.
- **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.

## Supported releases

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 24.04

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 24.04.

The following key features are included in this release:

- **Right-to-left (RTL) layout**

  Introduced support for an optimized right-to-left (RTL) UI experience that automatically adjusts screen contents for locales that use a right-to-left script.

- **iframe custom card**

  A new type of custom card for displaying web contents such as URLs, HTML, PDFs or other image types in an iframe within Workspaces.

- **Custom card action**

  The ability to call a custom action within a custom card that works like a global custom action.

- **Custom card enhancements**
  - Allow end users to copy text from list type custom cards using a new **Copy text** button.
  - Added support for rendering images within the custom card links.
  - Added support to set the status colours with “alert” type in custom cards.
- **Session expiry enhancements**
  - A new alert mechanism to prompt users about upcoming session expiry.
  - A new option to set the redirection URL upon session expiry.
- **Improved snackbar notifications**

  The ability to cascade multiple snackbar notifications when there are multiple messages to display.

- **Timeline stepper enhancements**
  - Support for rules to control whether certain steps appear in the timeline stepper.
  - Support for automatic filtering of steps based on their occurrence during the application processing journey.
- **Mapping field rules and permissions**

  Added support for setting up mapping field rules and permissions which take effect in the item list table and key info sections in addition to custom cards (already supported). Supported components:

  - **Permissions:** Item list table, Key info cards, custom cards
  - **Rules:** Key info cards, custom cards
- **Enhanced mobile responsive design**

  Enhancements to support a fully functional sub-table layout within the item list table for mobile devices.

- **Accessibility improvements**

  Numerous changes to improve the accessibility of the Journey Applicants, Journey Brokers and Journey Workspaces applications.

- **UI configuration editor**

  (Experimental) A UI editor in the configuration app that offers an alternative to the JSON interface.

  **Note:** Currently, this feature is not enabled for all UI components.

- **Modal window improvements**
  - An optimized content viewing area.
  - An option to enable or disable the opening of forms in a new browser tab.

## Journey Workspaces 23.10

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 23.10.

The following key features are included in this release:

Common features

- A full-fledged in-app configuration editor:
  - Edit the configuration in JSON format.
  - Store and retrieve the configuration for organization properties.
  - (Experimental) A code-free GUI configuration editor.
- Dynamic branding enhancements:
  - Set the theme from an organization property.
  - Apply brand to forms rendered through Workspaces.

Journey Workspaces

- SLA enhancements supporting fine-grained SLA definitions.
- Share a Workspaces details screen with other users.
- Extend standard action functionality using a fluent function call back.
- List screen table supports job source with collapsible table rows, allowing display of applications and tasks together.

Journey Applicants

- SMS- or email-based authentication (proof-of-concept only).
- Integration with Unblu for online assistance (proof-of-concept only).
- A mobile first design with many UI/UX enhancements.

- Custom card enhancements in the mobile experience.
- Accessibility improvements.

Journey Brokers

- MVP version for non-bank authenticated users (such as brokers).
- A responsive app, optimized for both desktop and mobile experiences

## Journey Workspaces 23.04

To view the release notes and learn about all the new features, improvements, and bug fixes in this release, see Journey Workspaces 23.04.

The following key features are included in this release:

- **Improved UI and UX:** Journey Workspaces and Journey Applicants have a fresh new user interface and improved user experience.
- **Table row expansion:** Expand table rows on the List, displaying additional information as a custom card.
- **Dedicated application and task panes:** An improved application details screen with dedicated panes for application- and task-level content.
- **New task switcher:** A new task switcher makes switching between tasks in an application seamless.
- **Consolidated notes:** A dedicated Notes card brings all notes added across an application together in one location.
- **Reply to notes:** A new comments feature lets users reply to any application note and view all the replies as a threaded conversation.
- **Simplified application timeline:** A streamlined application timeline feature that displays just the different stages of application progression.
- **Custom card enhancements:** Including:
  - Support for an alert icon on custom card tabs (`checkStatus` attribute)
  - Customize the link icon for invoking a fluent function
  - Tooltips for link icons in custom cards
  - Restored the numerical information display as a chart
  - Extended table cards support tables as a subsection
- **Error framework improvements:** The error reporting framework provides additional information about mapping field configuration errors.
- **Receipt improvements:** Improvements to the receipts data source to ensure Workspaces users can view receipts across the application.

- **Mobile responsive design:** A fully responsive Journey Applicants app for desktop and mobile in both landscape and portrait orientations.
- **Improved modal windows:** Modal window improvements include an optimized viewing area based on its content type.
- **Material icons:** Configuration now supports using any Material icons in Journey Workspaces and Journey Applicants.
- **Data source improvements:** Configure the Workspaces List screen using data from job properties in addition to the transaction metadata.
- **On-screen configuration editor:** Improvements to the **experimental** on-screen Workspaces configuration editor including a preview of changes.

### 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.

The following key features are 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. |
| 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. |

## End-of-life releases

### 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. |
| 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. |

| Key Features | Description |
|---|---|
| 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 | Detailed console reporting of configuration errors that eases the effort |

| Key Features | Description |
|---|---|
| reporting | 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. |

| Key Features | Description |
|---|---|
| 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.

| Key Features | Description |
|---|---|
| Views | A view is a pre-created filter that allows agents to get to the tasks that they must work on quickly.<br><br>Views offer the following benefits:<br><br>• An efficient way to keep track of pending applications that need to be processed.<br>• High visibility on the applications that enter and exit task queues.<br>• Reduce overall time to find the tasks that need to be processed. |
| Filters | Views can be further refined to support the needs of processing agents by filtering and/or sorting on specific task list columns.<br><br>Filters offer the following benefits:<br><br>• Augment a view's pre-configured criteria.<br>• Allows further narrowing down on search criteria.<br>• Specify multiple filter conditions to hone in on specific applications. |
| Applicant Info | Applicant info summarizes the key information about the applicants.<br><br>Applicant Info offer the following benefits:<br><br>• A simple summary about the applicants in an application.<br>• See key applicant details like name and phone number at a glance.<br>• Easily differentiate between applications with a single applicant or joint applicants. |

| Key Features | Description |
|---|---|
| Background Checks | Validation results from third-party services can be seamlessly integrated and viewed in Transact Workspaces.<br><br>Background Checks offer the following benefits:<br><br>• Summarise the results from integrated third-party services.<br>• Visual indicators that aid in identifying the actions required on pending applications. |
| Application Timeline | A simple application timeline with the ability to add and review notes.<br><br>The Application Timeline offers the following benefits:<br><br>• A streamlined way to track the stages that an application has completed.<br>• 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.<br><br>Attached Documents offer the following benefits:<br><br>• A centralized place for reviewing documents attached to the application at various stages.<br>• Attach additional supporting documents while reviewing the application. |

# Workspaces core concepts

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) 19.11This feature was introduced in the 19.11 release 23.10This feature was updated in the 23.10 release
- 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 |
|---|---|---|
| Review[1] | Processing staff | Offers review capabilities for pending applications that need manual action. |
| Document Requests [1] | 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. |

| Space | Used by (Role) | Description |
|---|---|---|
| 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. |
| Brokers | Authenticated non-bank staff | Allows applicant representatives (such as brokers) to start, monitor, and manage applications through to completion. |

1. By default, the Review and Document Requests spaces are grouped together under the Process space group.

The default Workspaces configuration caters for bank staff in various roles, and includes all of these spaces except the Brokers space. Journey Brokers and Journey Applicants are separate Workspaces portals for use by authenticated non-bank staff and applicants, respectively, configured with just one 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).

INFO

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.

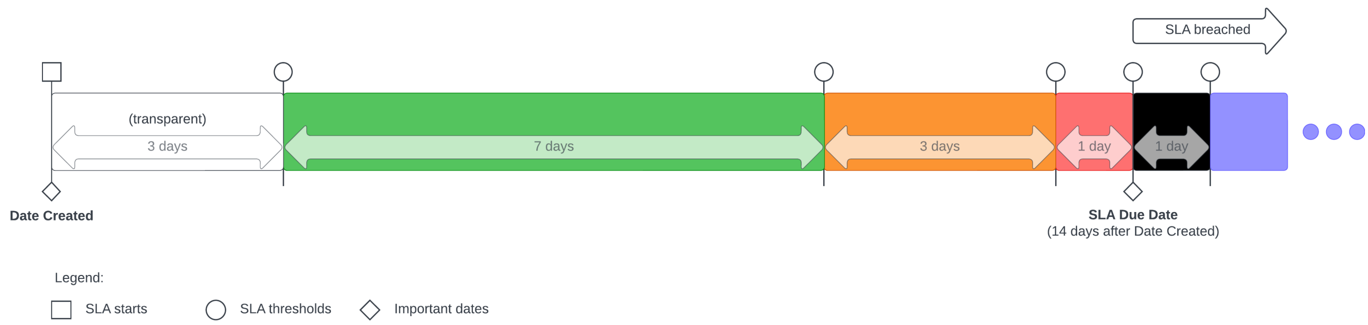
NOTE

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

## Service-level agreement

A service-level agreement (SLA) is a contract between parties stating how certain aspects of business between them is to be conducted. Often, an SLA defines time-based escalation points with respect to a fixed point in time and against which the progress of work is monitored. Workspaces supports this aspect of SLAs, using an approach comprised of multiple threshold dates measured from a reference date being either the application's creation date or another date in the future.

The following diagram illustrates what a Workspaces SLA might look like. This example SLA has a 14-day processing period, with a 3-day cooling-off period after submitting an application, and escalation points 4 days before and 1 day before application processing is due to be complete. There's also an additional escalation point 1 day after the due date to highlight that application processing is overdue. The colors are used in the Workspaces user interface to reflect SLA progress; for example, as the color of the SLA indicator on a List screen.



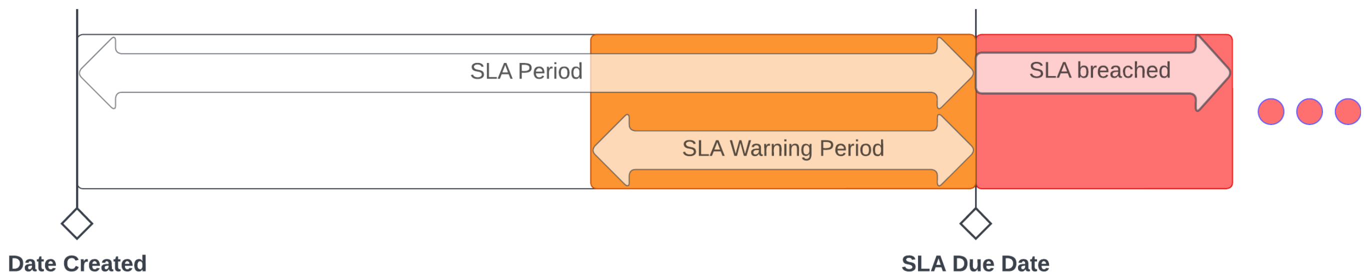

You can easily monitor the progress of applications against an SLA using the SLA Expiry field in the Key Info card on the Details screen. Also, in the Review space and Manage spaces, there's a graphical SLA indicator in the item list that provides an overview of application processing progress at a glance.

### Basic SLA

In addition to the comprehensive SLA described above, Workspaces also offers an alternative basic SLA that follows a three-stage 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.

As mentioned above, the terms of an SLA usually stipulate the SLA processing period and when the SLA starts. It's common for the SLA Period to start when the application is submitted but it may be any time after this. While the SLA Period is measured forward in time from when the SLA commences, the SLA Warning Period 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.

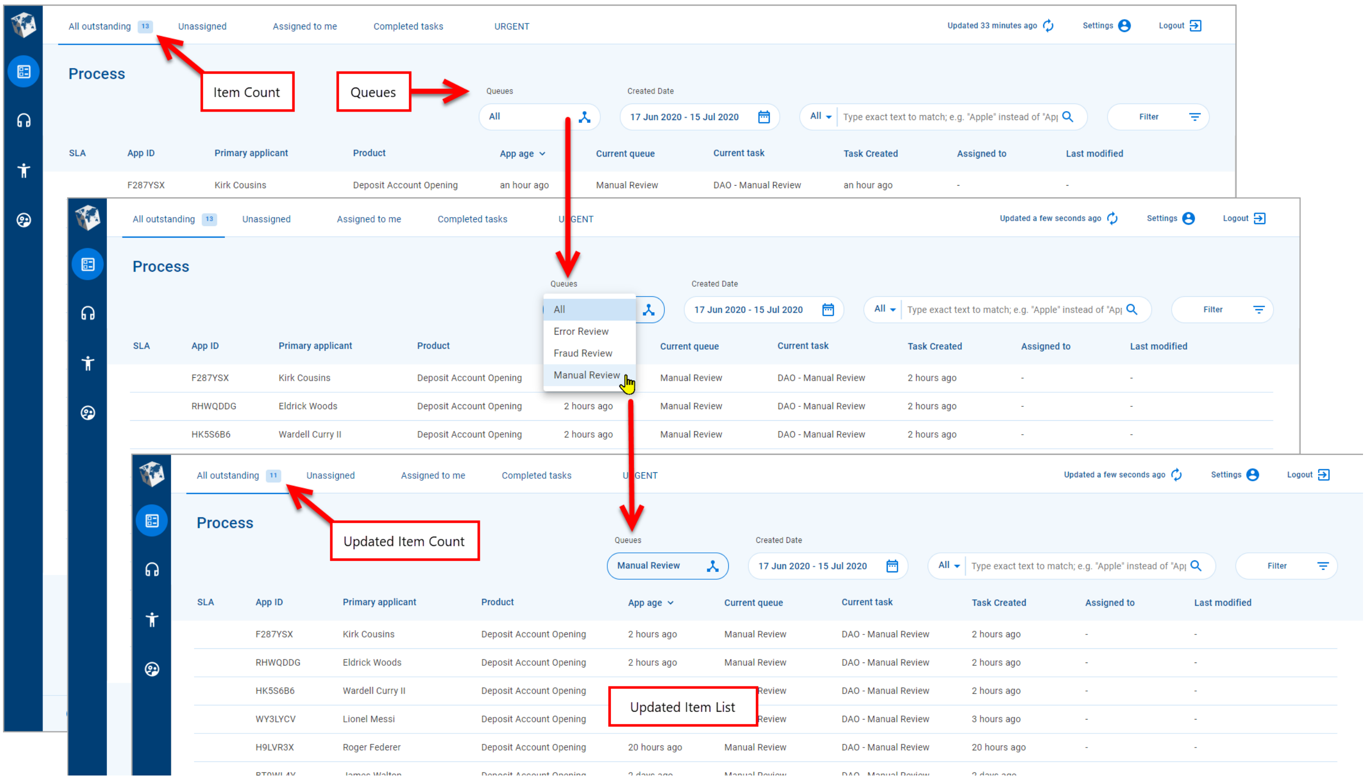


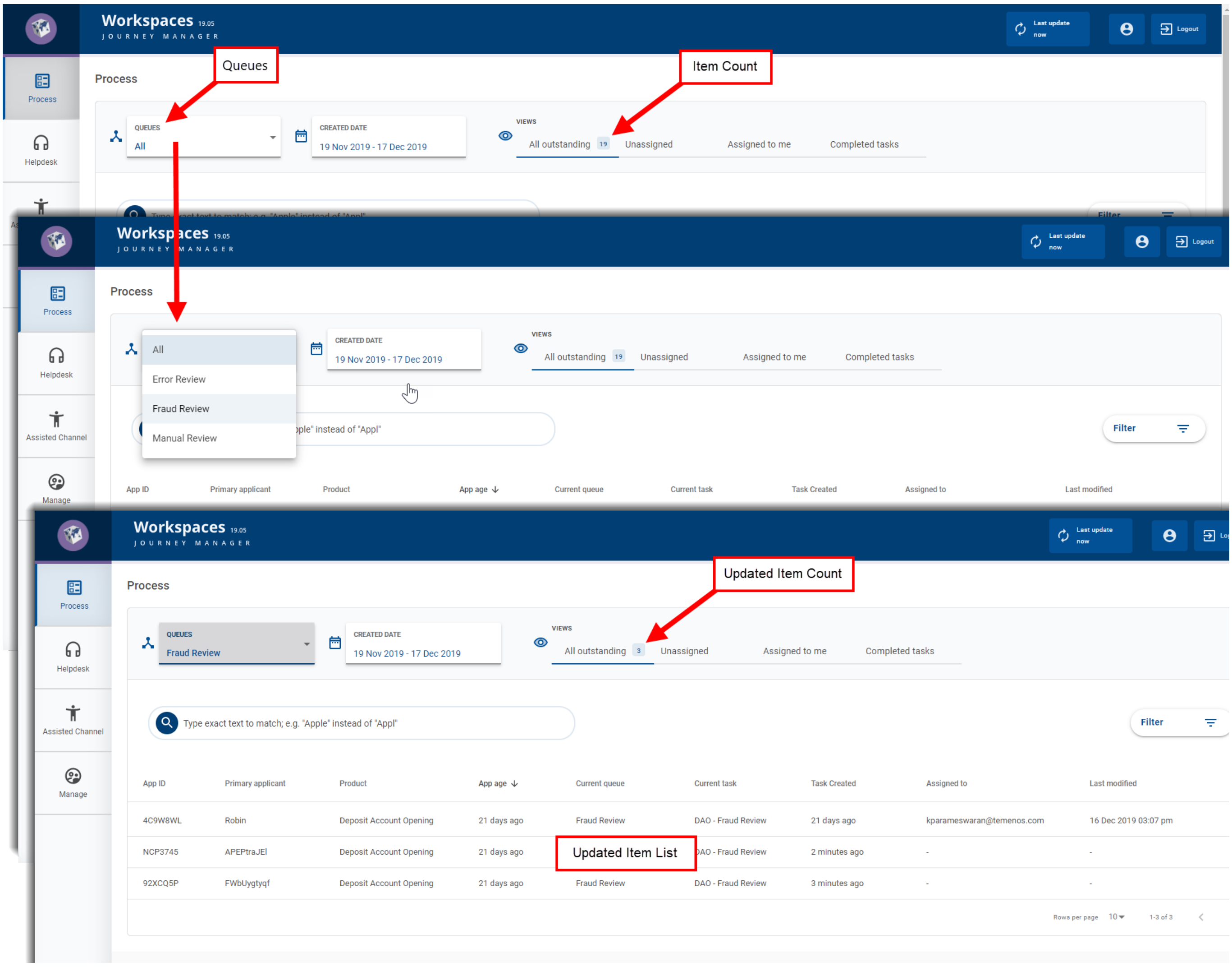

## Queues

The default configuration of the 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



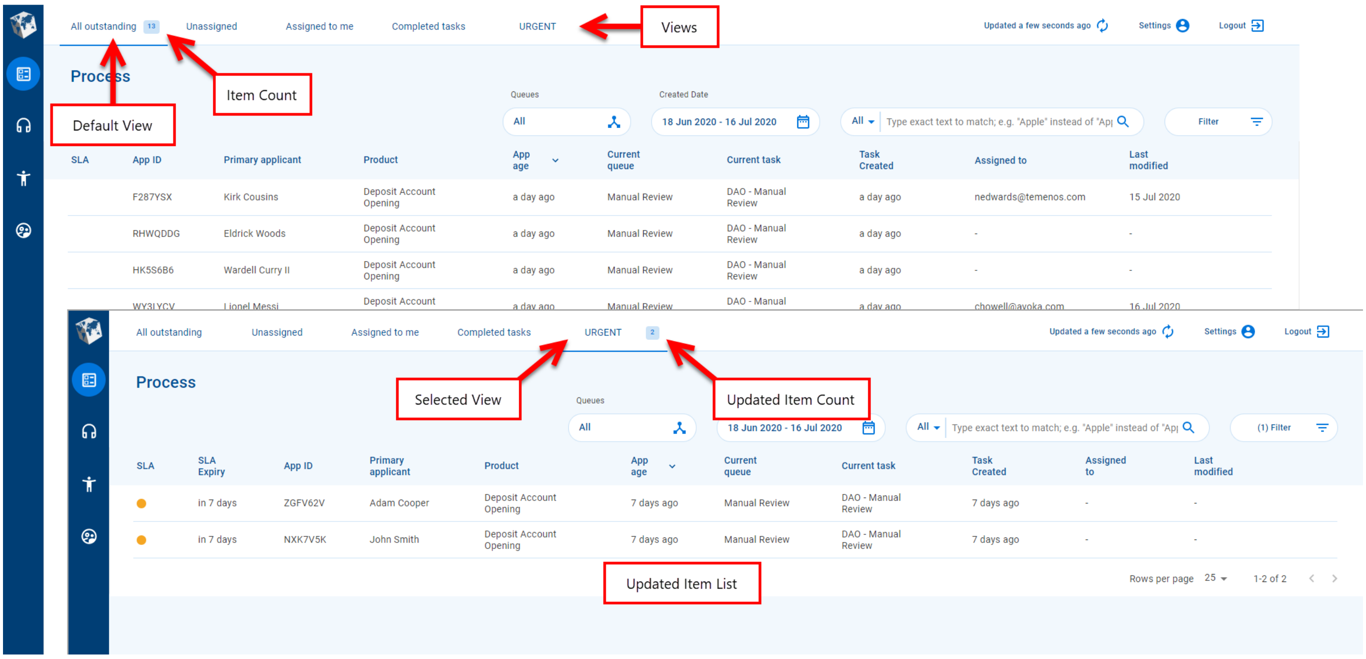


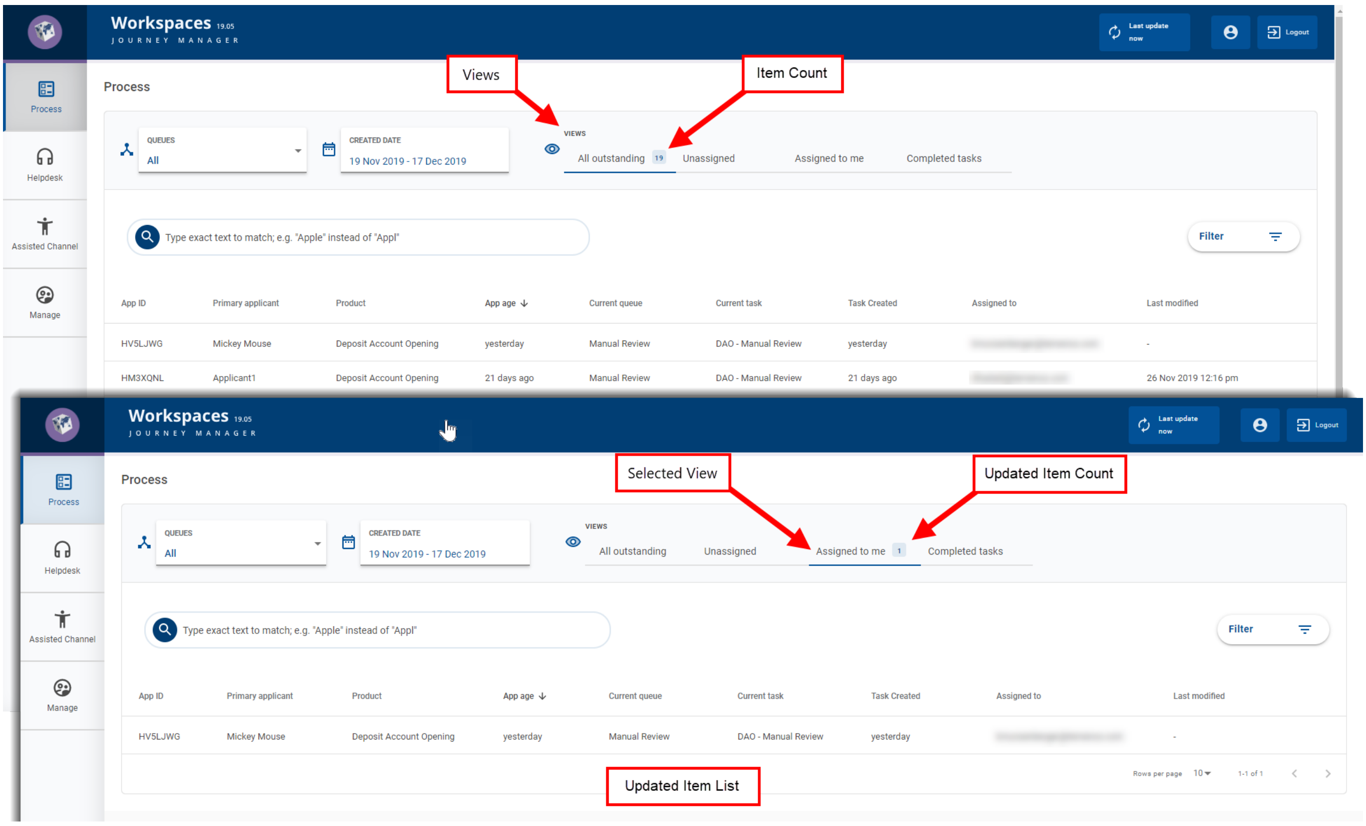

## Views

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.

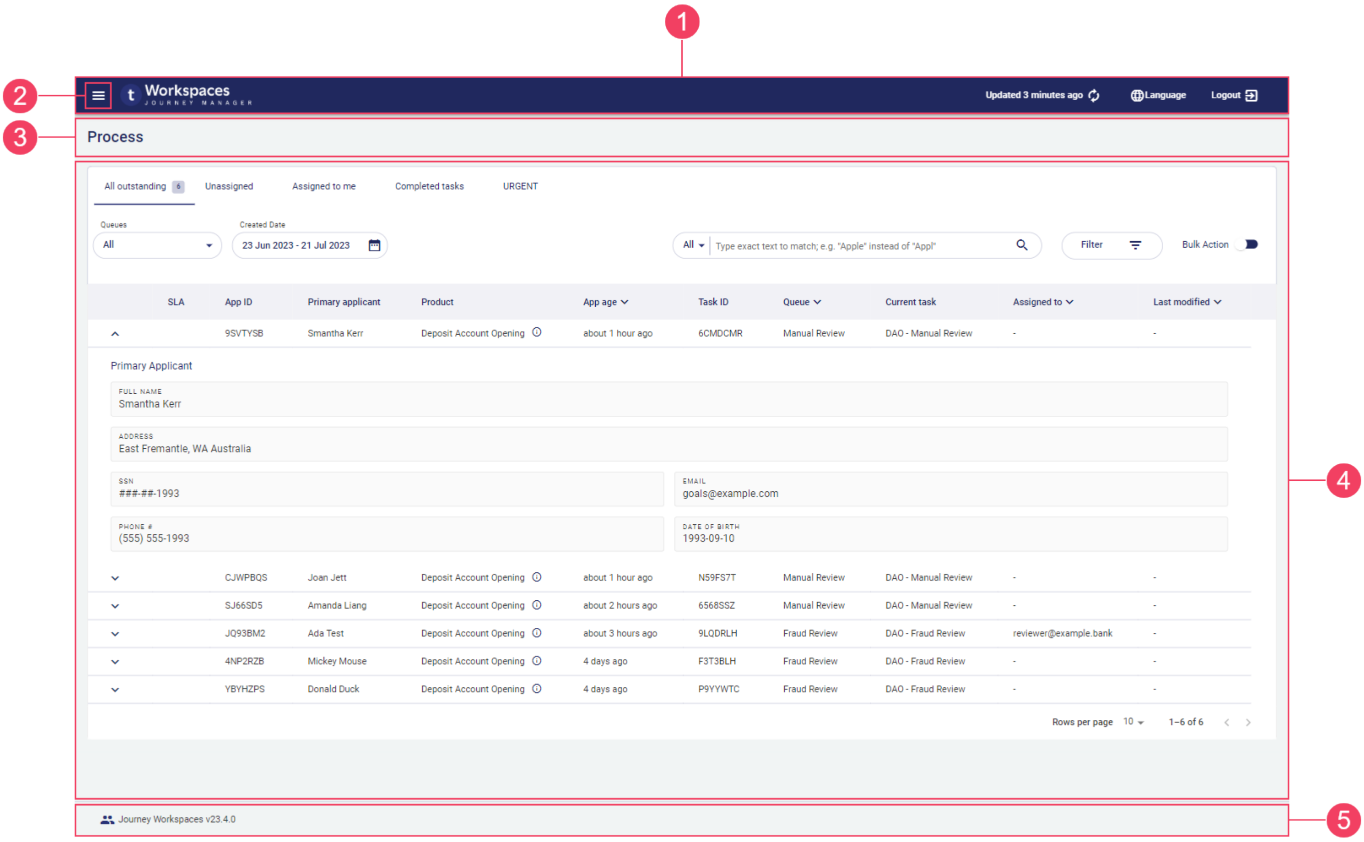
The spaces you can access also control which features are available to you. For example, if you have access to the Review space or Manage spaces, you can select a queue which gives you access to the specific tasks on that queue. Then, the tasks or applications you can access and their current state determine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

# Workspaces UI tour

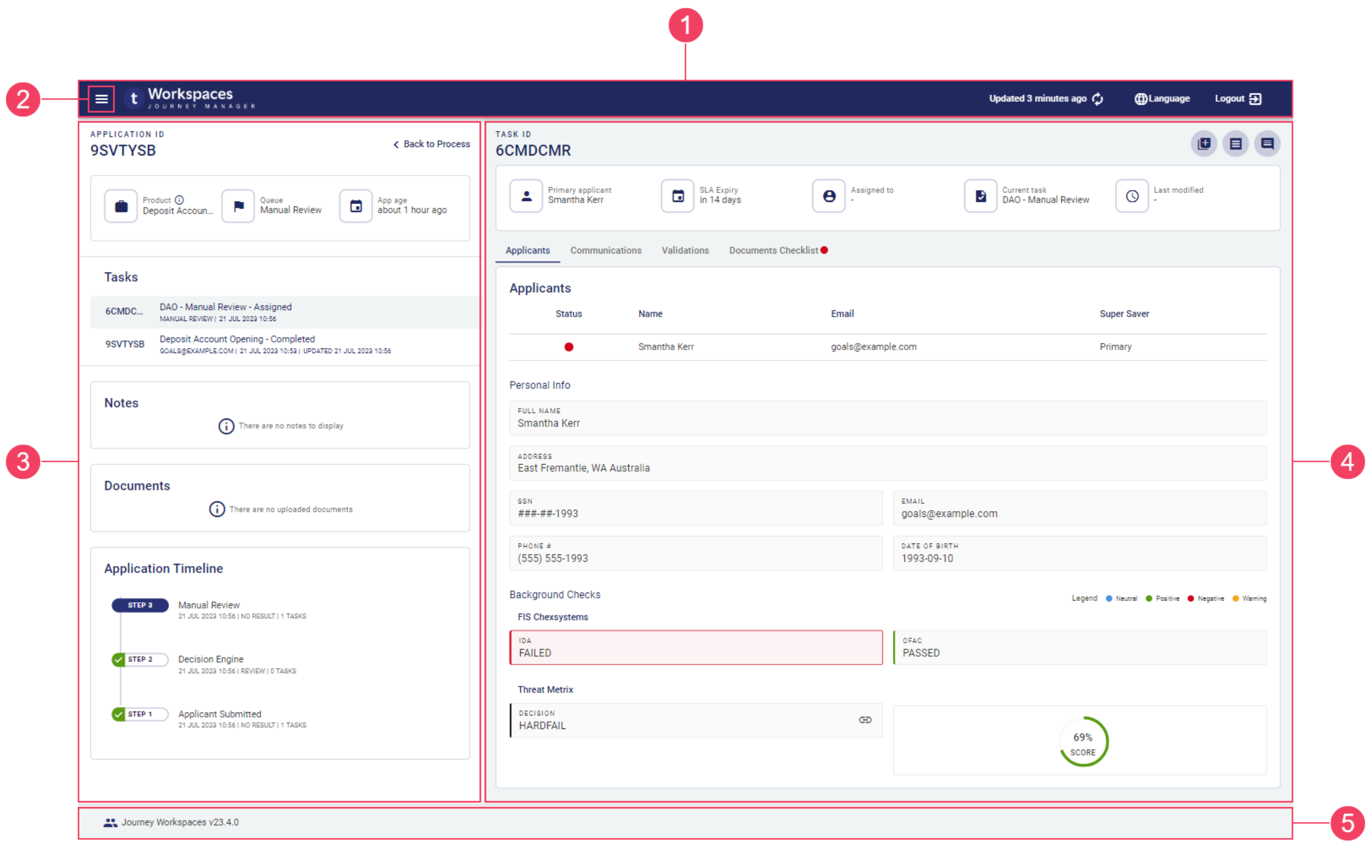
With a consistent layout and common user interface elements, Journey Workspaces is designed to give you a great user experience right from the start. Let's take a look at some of the common elements that make up the Journey Workspaces user interface (UI).

Each screen is based on a common layout that can be modified as required through configuration. All screens have a header at the top and a footer at the bottom that provide common functionality. The remainder of each screen contains content and features that are specific to the selected space and the screen type (List, Search or Details).

- [List screen]
- [Details screen]




1. Screen header
2. Spaces navigation icon
3. Screen name
4. Content pane
5. Screen footer




1. Screen header
2. Spaces navigation icon
3. Application pane
4. Task pane
5. Screen footer

The screen header includes the Spaces navigation icon and three buttons on the right: autore-newRefresh, languageLanguage, and exit_to_appLogout. Beneath the screen header on a List or Search screen is the screen name which corresponds to the name of the selected space. The screen footer has no interactive components, simply showing the application name and version which can be useful when seeking product support.

The majority of the screen is occupied by one or more panes containing the content and features that are specific to the selected space and screen type. To learn more, see Screen content.

## Branding

Workspaces has been designed to give you a great user experience, with much consideration given to many visual design decisions resulting in a modern user interface (UI) that is beautiful, consistent, and easy to use.

A core element of the UI is color. Workspaces uses a palette of complimentary tones, based on a primary color from which lighter and darker shades are derived. The tones from this palette contribute to a theme which is used in several ways.

- The theme is applied to various components in the Workspaces UI.
- Forms can be branded with the theme. 23.10This feature was introduced in the 23.10 release
- A theme can be associated with an [organization](). This supports white-labeling, say, for sub-brands or products. 23.10This feature was introduced in the 23.10 release

Workspaces comes with a default theme based on Temenos branding. However, you can derive a custom theme based on a color from your brand, usually your brand's primary color or something similar. This provides a simple way to make the appearance of your Workspaces portal align with other software in your business. If you want to learn about theme color selection, see [API > Workspaces > Guides > Theme color]().

INFO

The images in this documentation reflect the default theme based on Temenos branding.

## Select a space

The Spaces navigation icon identifies all the spaces available to you, 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 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 |
|---|---|---|
| Review[1] | Processing staff | Offers review capabilities for pending applications that need manual action. |
| Document Requests [1] | 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. |

| Space | Used by (Role) | Description |
|---|---|---|
| Manage | Managers and super-visors | Provides task management capabilities. |
| Brokers | Authenticated non-bank staff | Allows applicant representatives (such as brokers) to start, monitor, and manage applications through to com-pletion. |

1. By default, the Review and Document Requests spaces are grouped together under the Process space group.

For more information about spaces, see [Roles and Spaces].

## Screen header

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


1. Spaces navigation icon
2. Screen refresh
3. Language
4. Logout

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

- **Spaces navigation icon:** Click this icon to display a menu presenting the available spaces that you can select from to work in. 23.04This feature was introduced in the 23.04 release
- **Screen refresh:** When the information displayed on the screen was last refreshed, and an option to refresh it.
- **Language:** Select the language used for static text in the Workspaces UI. 21.11This feature was introduced in the 21.11 release
- **Logout:** End your current Workspaces session securely.

INFO

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.

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 beside the autorenewRefresh button. If the screen has not been updated recently or you just want to make sure you're looking at the latest information, click autorenewRefresh to refresh the screen.

## Screen content

The main part of each screen is occupied by components that either display application- and task-related information, or allow you to interact with a selected application or task. The content and features available are specific to the selected space and screen type.

- A List or Search screen contains an item list and other components that determine which items are displayed and allows you to interact with them. To learn more about List screens, see Understanding the Workspaces List Screen.
- A Details screen contains an application Application pane on the left and a Task pane on the right. The Application pane presents application details and a task switcher, while the Task pane contains task-related content for a selected task including action buttons and other interactive components. To learn more about the application and task panes, see Application and Task panes.

### 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.

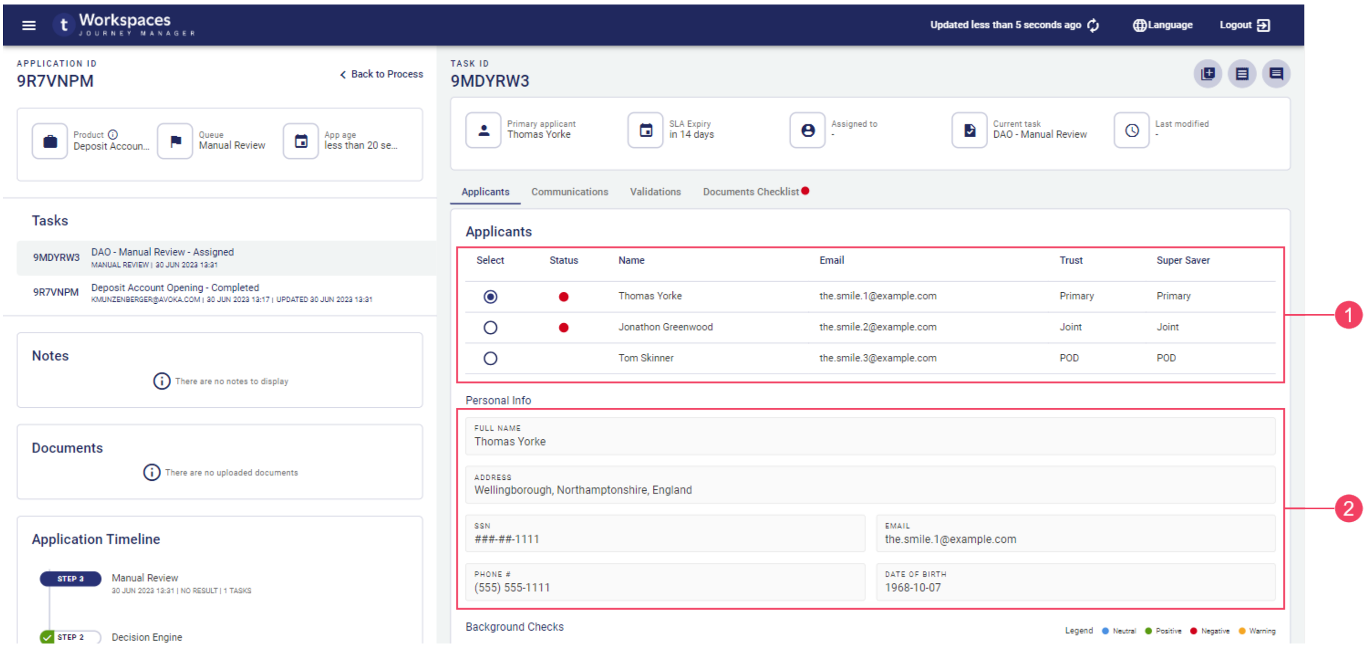
By default, values in table columns wrap when they are wider than the column. However, sometimes this behavior is undesirable, and it can be overridden for specific columns via configuration.

## Custom content

Much of the Workspaces user interface presents various types of content (information and features) in components or layouts specifically designed for each content type. In addition to the standard content types, your Journey Workspaces portal may also be configured with additional custom content specific to your organization. While custom content is more commonly available on the Details screen in separate tabs 22.10This feature was introduced in the 22.10 release, you may also find it used on the List screen in expansion rows.

Workspaces supports two format options for custom content, designed for two different kinds of data:

- **Multi-value data:** Content is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different kind of content, identified by the column header, while each row relates to a single entity such as an applicant, a background check, or a document. Each individual data item is either a simple text/number display or an icon button that links to additional details or functionality. All data items in the same column are of the same type.
- **Single-value data:** Each data item in a container (such as a tab, card or section) is displayed separately, with a label and value, and an optional icon button that links to additional details or functionality.



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

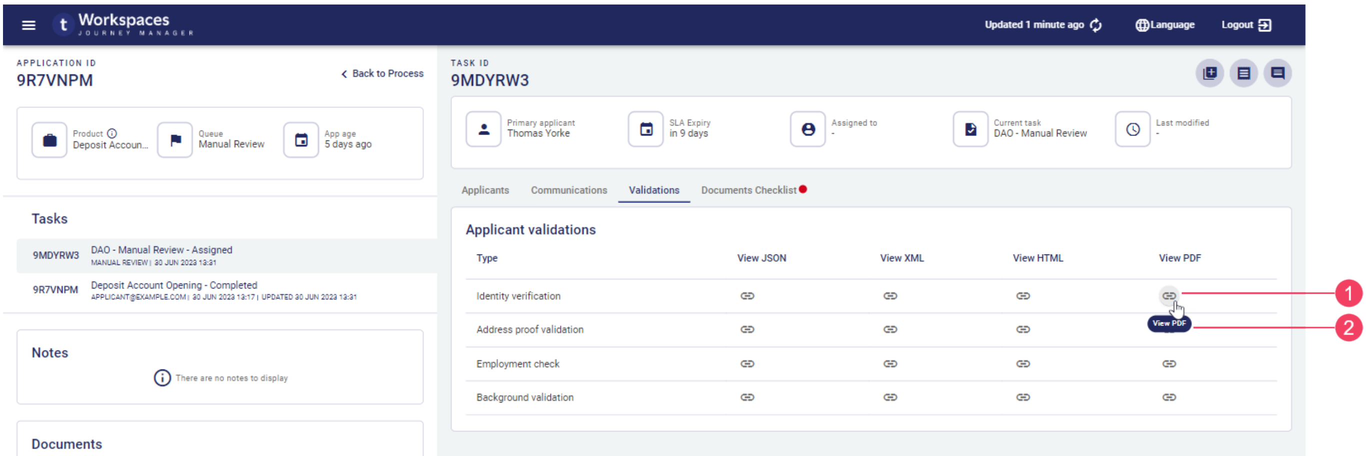
INFO

Custom content 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.

Several icon types are supported for icon buttons in custom content:

- **link**Detail Link**:** Indicates additional details are available to view. Click the icon button 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 button 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 button to perform the associated action. 22.10This feature was introduced in the 22.10 release

An icon button is usually accompanied by a tooltip as part of the accessible user interface available to all users. This helps to explain an icon button's purpose, in case the icon is not recognized immediately.




1. Icon button
2. Accessible tooltip

## 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.

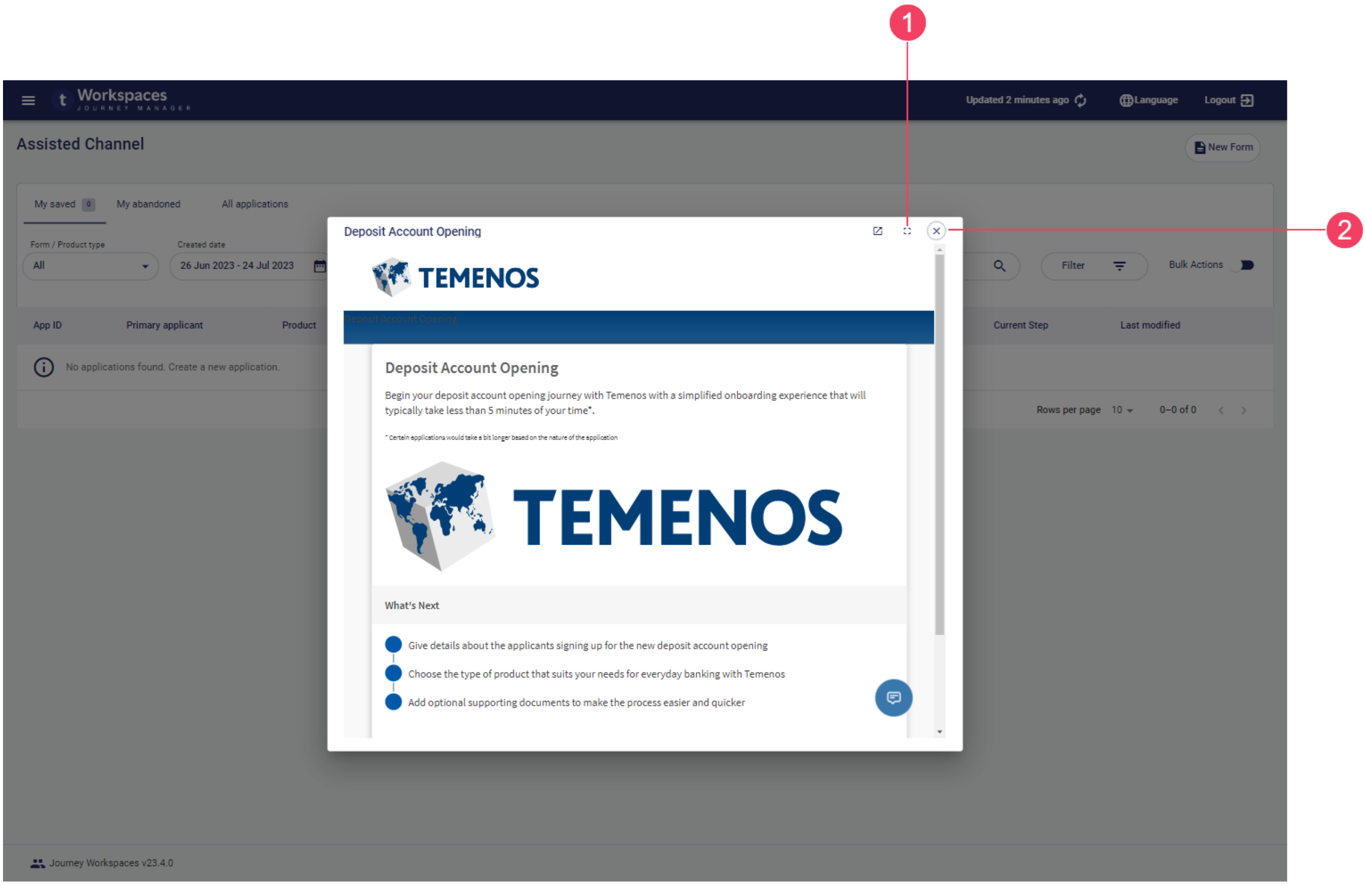
- View any receipt for any task associated with a selected application.
- Manage the documents attached to an application.
- Start, fill in, and save or submit a new form in the Assisted Channel space.

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. Further, a modal window that contains a form opens in full screen by default. If you need to interact with the Workspaces screen behind a modal window, the modal 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. 22.10This feature was introduced in the 22.10 release

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 fullscreenFull Screen and fullscreen_exitExit Full Screen icons to control the size of a modal window, or the open_in_newPop Out icon to pop out the modal content into a separate browser tab. When you're finished with a modal, click the closeClose icon to close the modal window and return to the Workspaces screen where the modal window was opened. The screen is reloaded to reflect any changes made while the modal window was displayed.

- Modal Window
- Modal Window - Full Screen

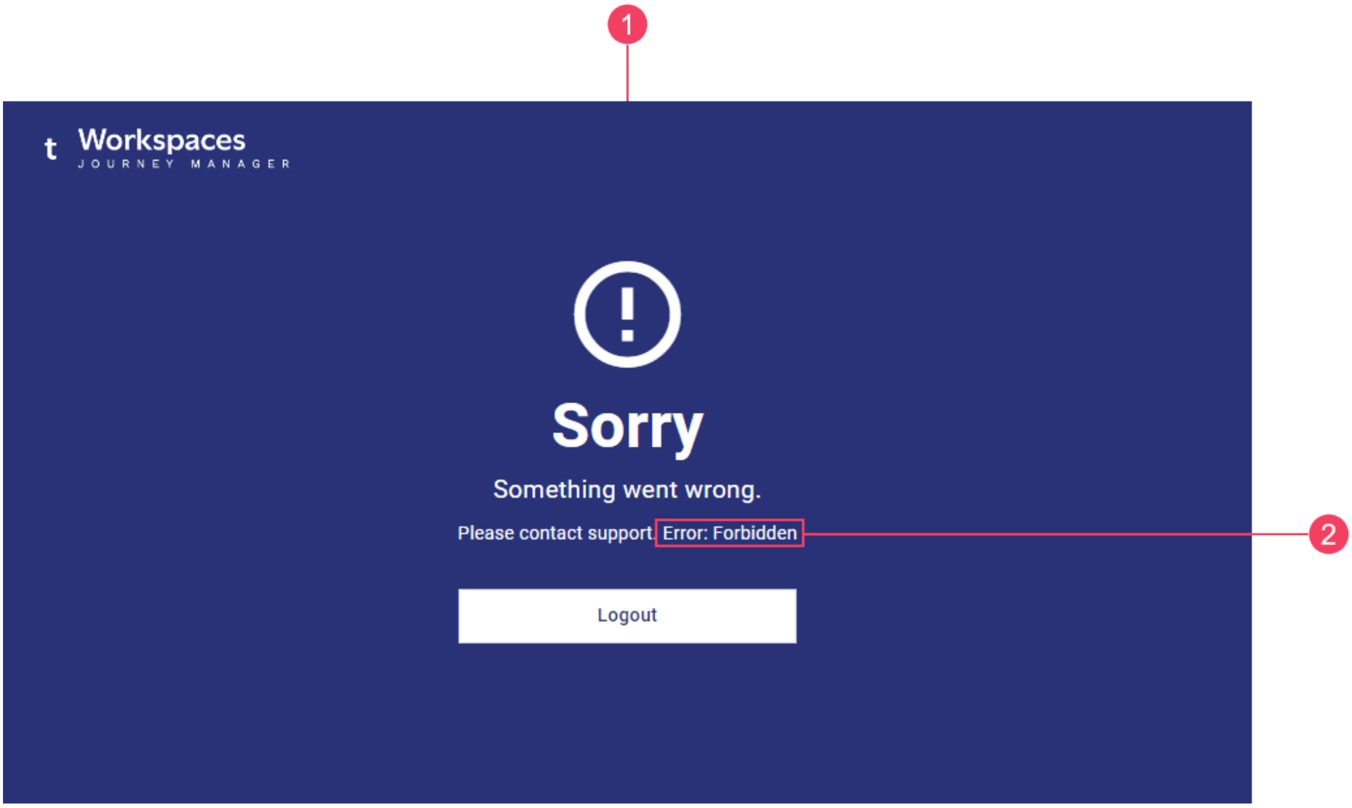



## Time Zones in Workspaces

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

## Error screen

Workspaces is designed to handle a variety of predictable situations gracefully. Nevertheless, from time to time something could happen that Workspaces doesn't know how to deal with. In these situations, Workspaces has a handy screen that helps you to understand what went wrong and get the help you need.




1. Error screen
2. Error text

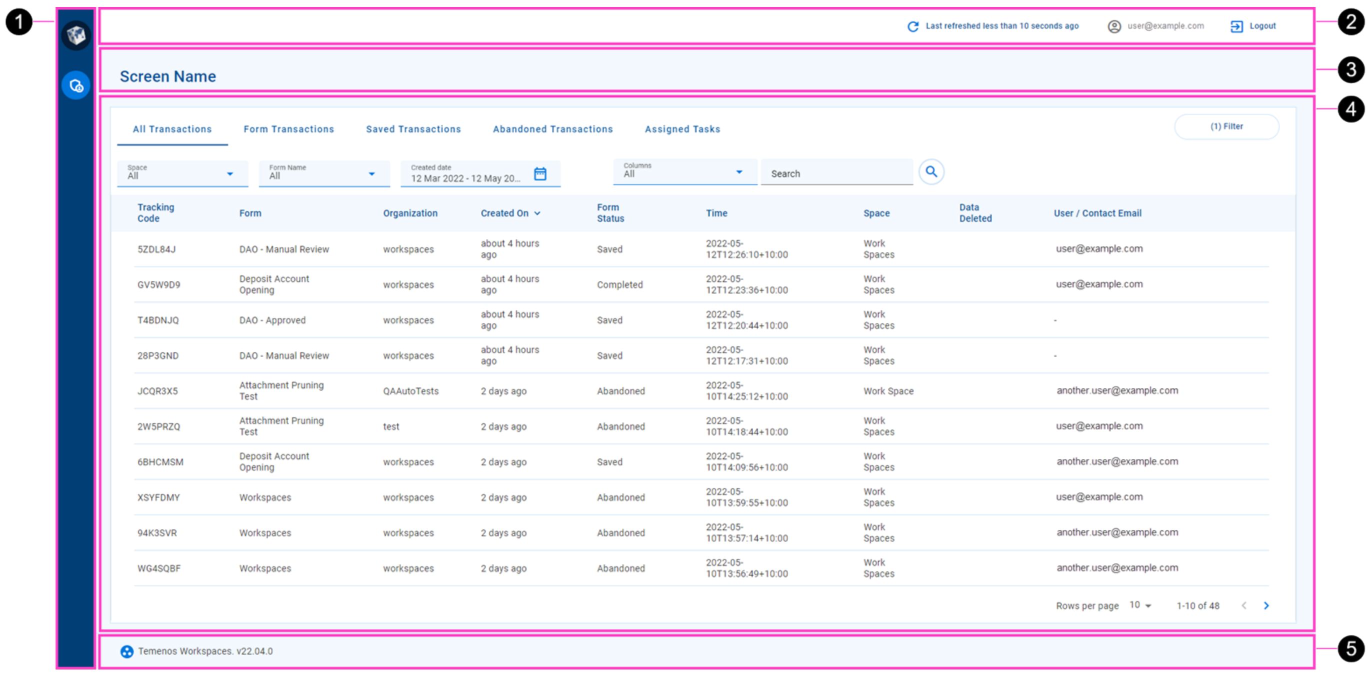
The error screen displays information about how to resolve the error you encountered. Usually, this involves contacting your support team and providing some details to aid in troubleshooting your problem. When seeking assistance, include the error text displayed on the error screen in the details you provide to your support team.

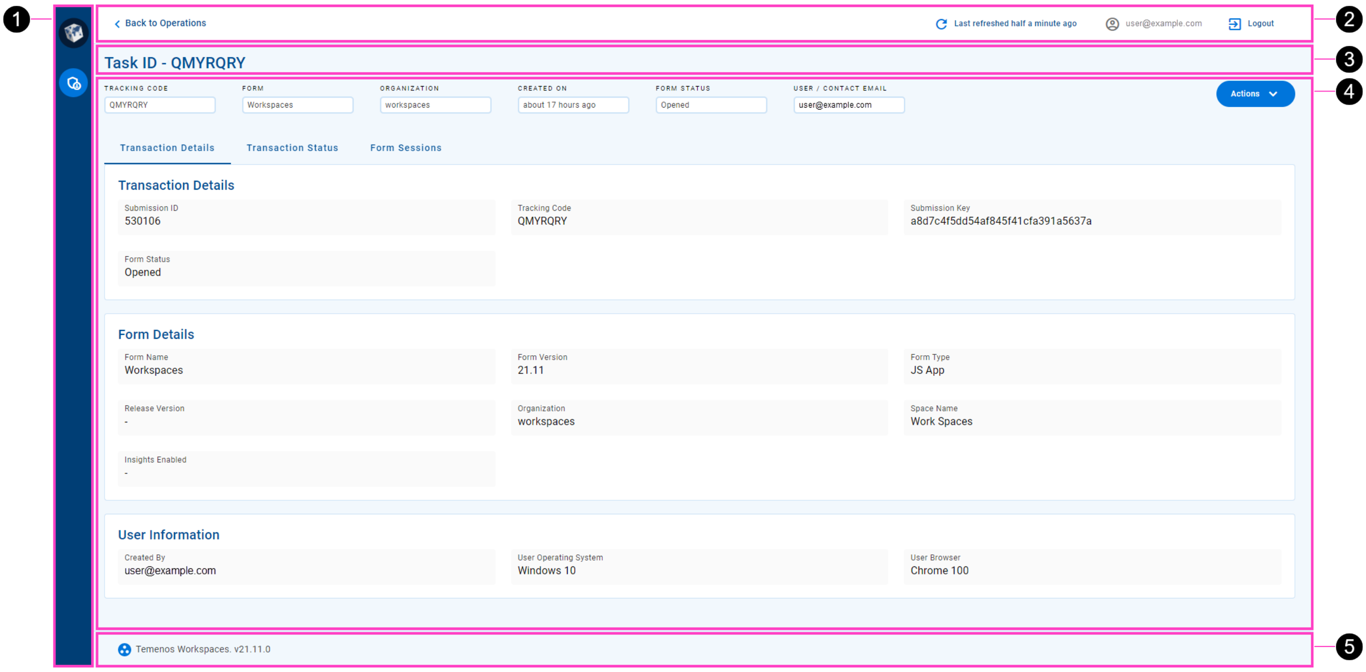
# Workspaces UI tour (22.10 and earlier)

With a consistent layout and common user interface elements, Journey Workspaces 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 Journey Workspaces user interface (UI).

Each screen is based on a common layout that can be modified as required through configuration. All screens have a header and screen title at the top, a navigation bar on the left, and a footer at the bottom that provide common functionality. The remainder of each screen contains content and features that are specific to the selected space and the screen type (List, Search or Details).

- [List screen]
- [Details 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 Details 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 Details).
5. **Screen footer:** At the bottom of the screen is the screen footer which displays the application name and version.

## Select a space

The Spaces navigation bar identifies all the spaces available to you, 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 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 |
|---|---|---|
| Process | Processing staff | Offers review capabilities for pending applications that need manual 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. |

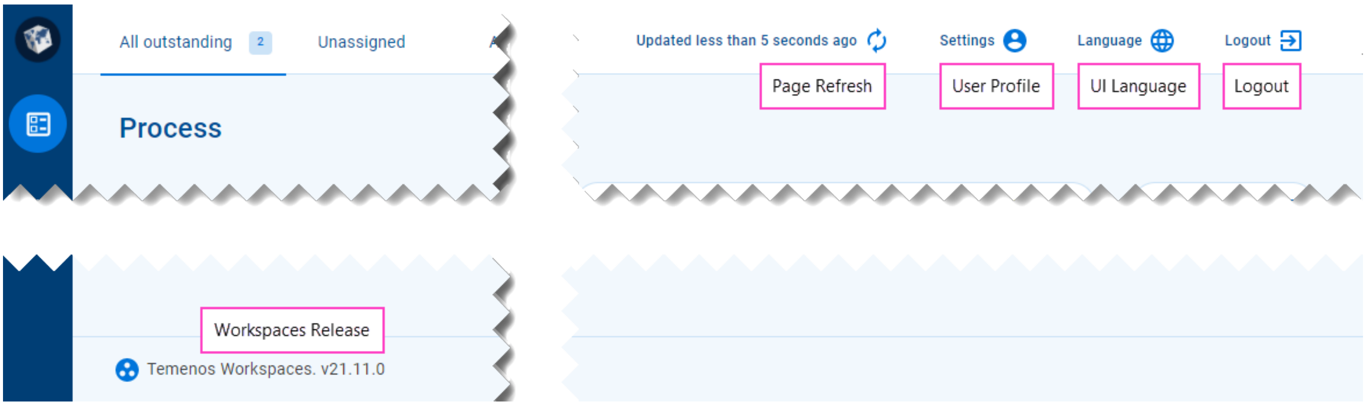
1. By default, the Review and Document Requests spaces are grouped together under the Process space group.

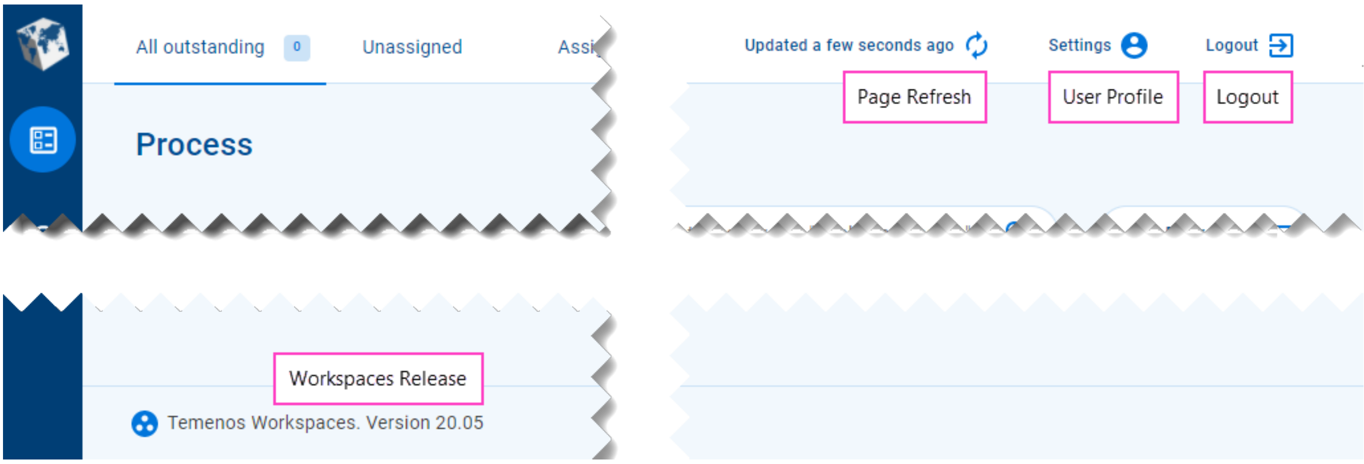
For more information about spaces, see Roles and Spaces.

## Screen header

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

- 21.11 to 22.10
- 20.05
- Prior to 20.05





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

- **Page refresh:** When the information displayed on the screen was last refreshed, and an option to refresh it.
- **User Profile:** A menu button providing access to User Profile options. 22.10This feature was removed in the 22.10 release
- **Language:** Select the language used for static text in the Workspaces UI. 21.11This feature was introduced in the 21.11 release
- **Logout:** End your current Workspaces session securely.

INFO

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 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 beside the autorenewRefreshbutton. If the screen has not been updated recently or you just want to make sure you're looking at the latest information, click autorenewRefresh to refresh the screen.

### User Profile

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

The main part of each screen is occupied by components that either display application- and task-related information, or allow you to interact with a selected application or task. The content and features available are specific to the selected space and screen type.

- A List or Search screen contains an item list and other components that determine which items are displayed and allows you to interact with them. To learn more about List screens, see Understanding the Workspaces List Screen.

- A Details screen contains components that display application and task information and provide features for you to complete the tasks. To learn more about the Details screen, see The Application Details Screen (22.10 and earlier).

## 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.

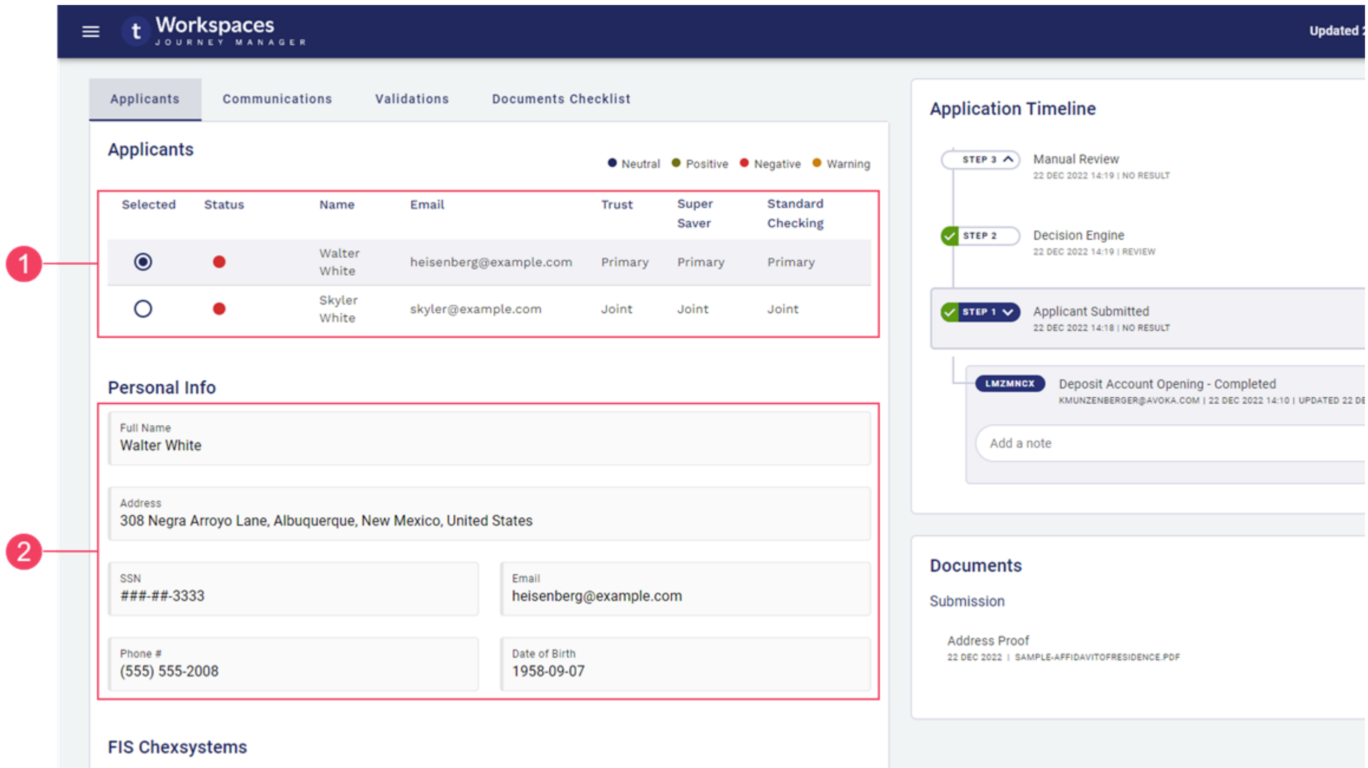
## Custom content

Much of the Workspaces user interface presents various types of content (information and features) in components or layouts specifically designed for each content type. In addition to the standard content types, your Journey Workspaces portal may also be configured with additional custom content specific to your organization. While custom content is more commonly available on the Details screen in separate tabs 22.10This feature was introduced in the 22.10 release, you may also find it used on the List screen in expansion rows.

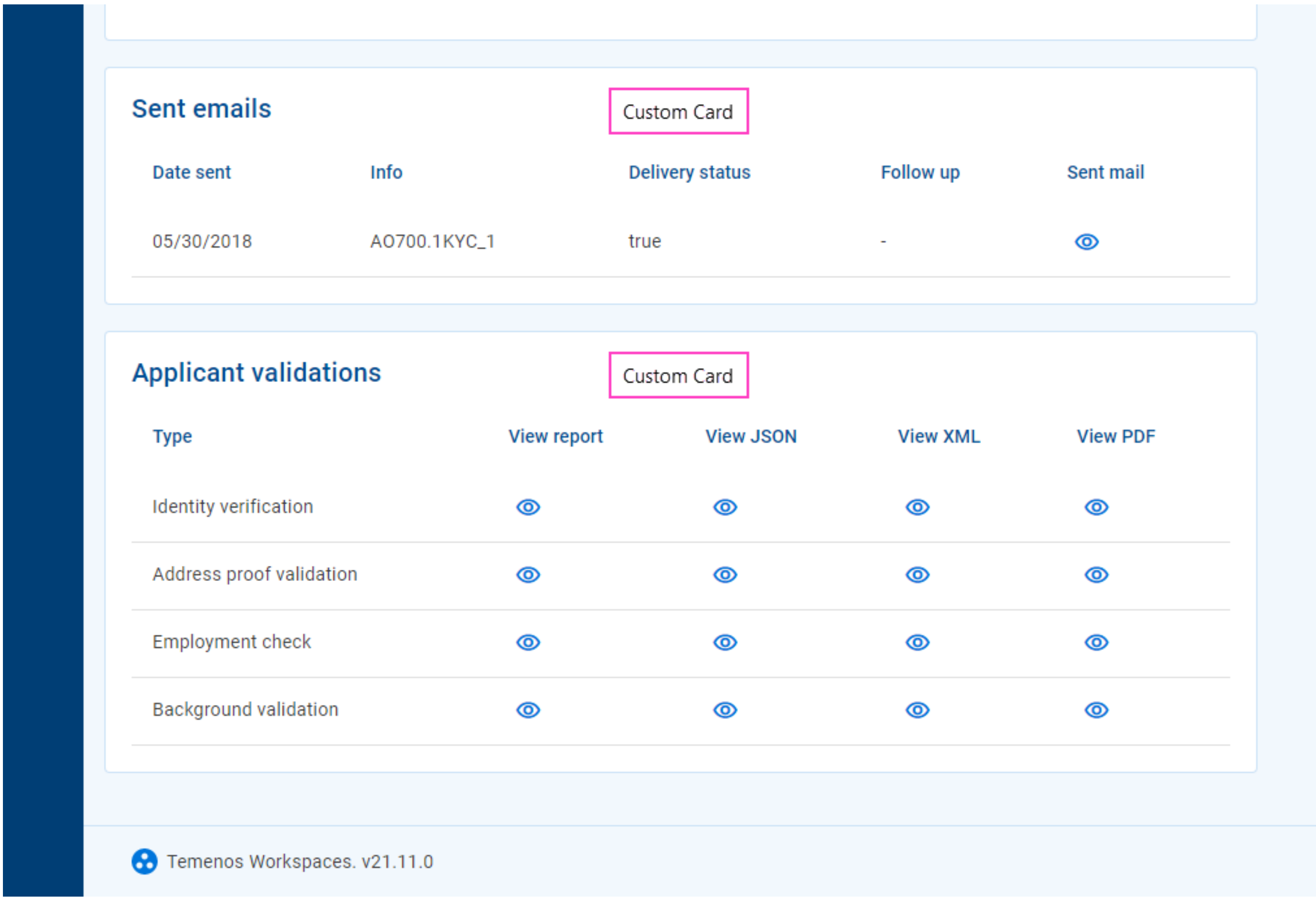
Workspaces supports two format options for custom content, designed for two different kinds of data:

- **Multi-value data:** Content is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different kind of content, identified by the column header, while each row relates to a single entity such as an applicant, a background check, or a document. Each individual data item is either a simple text/number display or an icon button that links to additional details or functionality. All data items in the same column are of the same type.
- **Single-value data:** Each data item in a container (such as a tab, card or section) is displayed separately, with a label and value, and an optional icon button that links to additional details or functionality.

- 22.10
- Prior to 22.10




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




INFO

Custom content 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.

Several icon types are supported for icon buttons in custom content:

- **link**Detail Link**:** Indicates additional details are available to view. Click the icon button 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 button 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 button to perform the associated action. 22.10This feature was introduced in the 22.10 release

# 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. 22.10This feature was introduced in the 22.10 release

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 fullscreenFull Screen and fullscreen_exitExit Full Screen icons to control the size of a modal window, or the open_in_newPop Out icon to pop out the modal content into a separate browser tab. When you're finished with a modal, click the closeClose 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.

## 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

NOTE

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

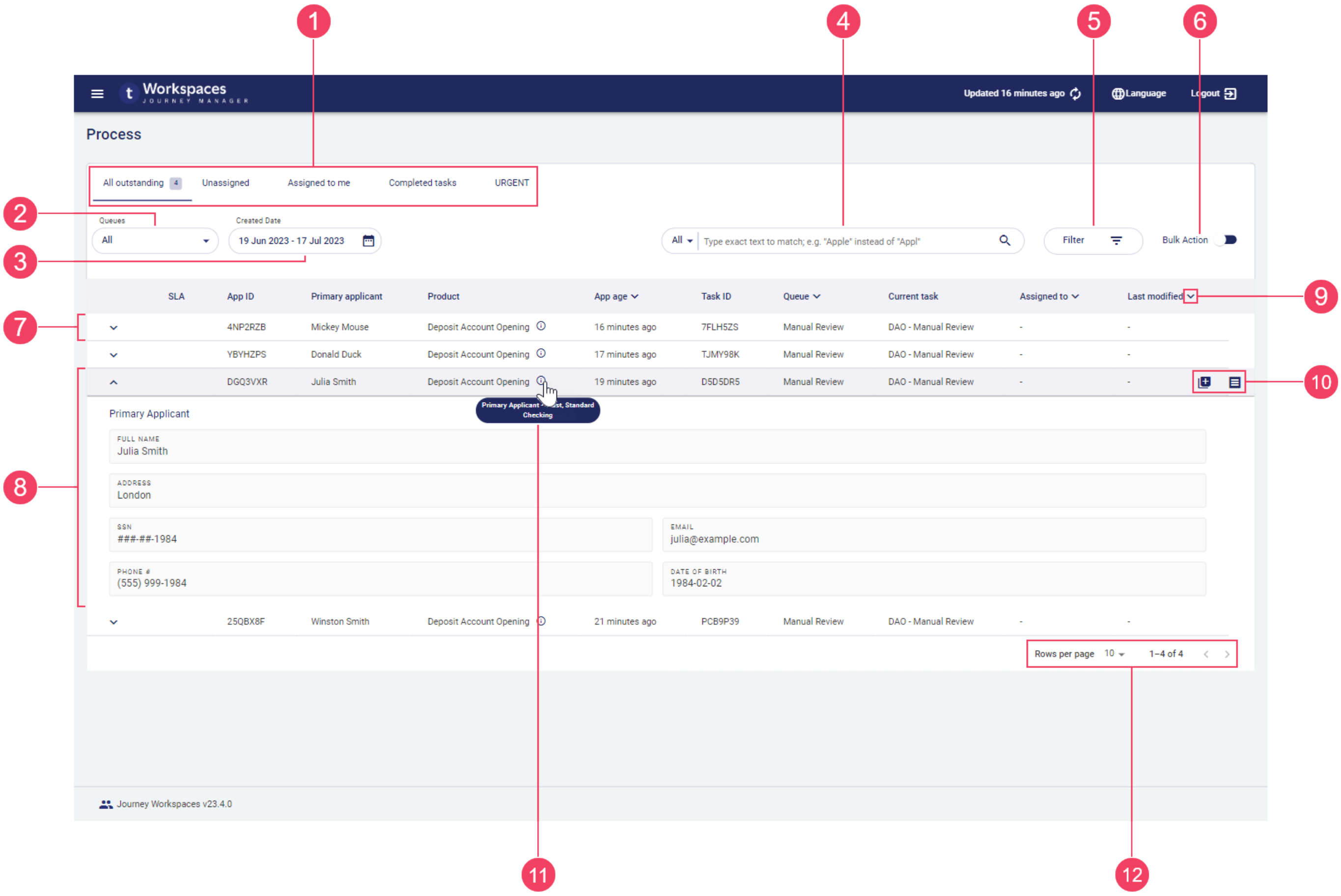
## Overview

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.

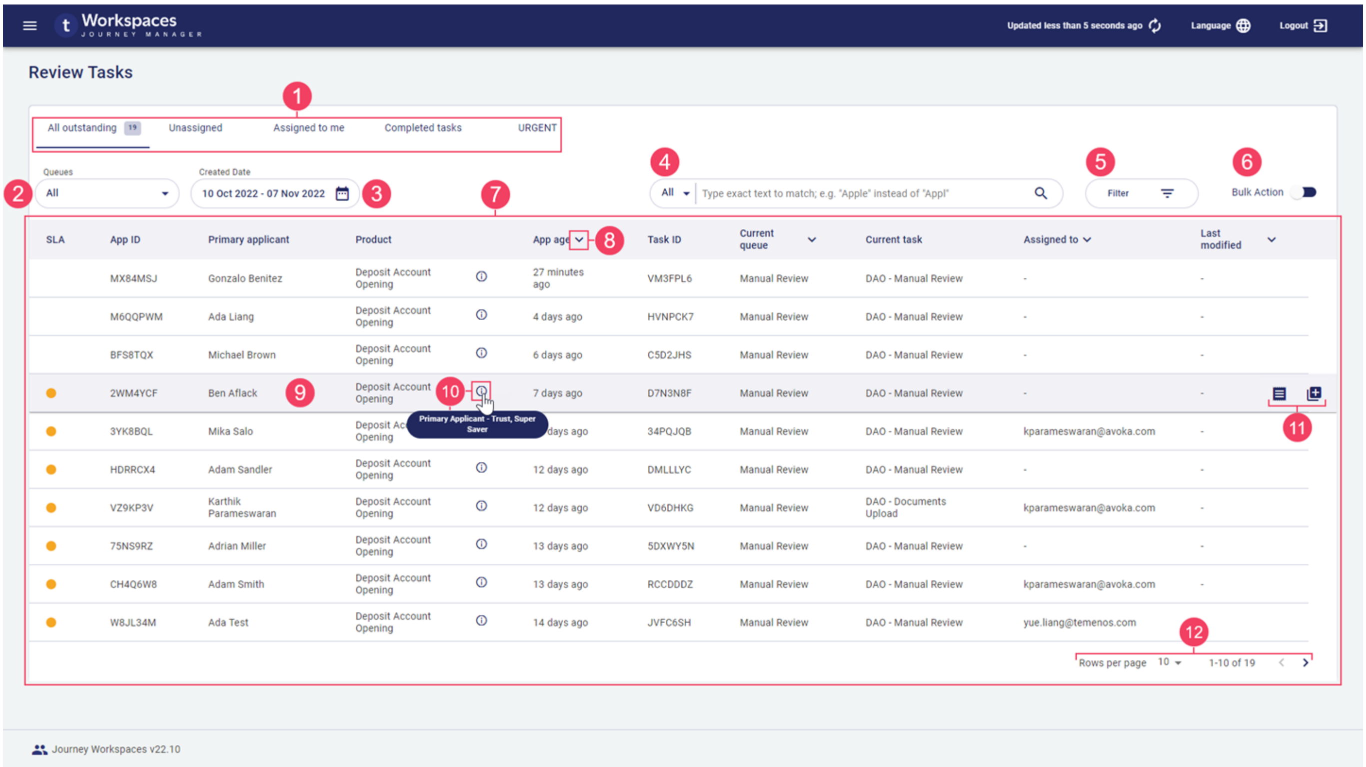
- An item list containing a list of tasks or applications.
- Support for optional item list expansion rows presenting additional content. 23.04This feature was introduced in the 23.04 release
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. 19.11This feature was introduced in the 19.11 release
- 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 (Review and Manage spaces) or a form / product type (Document Requests, Helpdesk and Assisted Channel spaces).
- A Created Date global filter 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.
- A Bulk Action mode switch to change between acting on a single task or multiple tasks. 22.10This feature was introduced in the 22.10 release
- 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 Review space as an example.

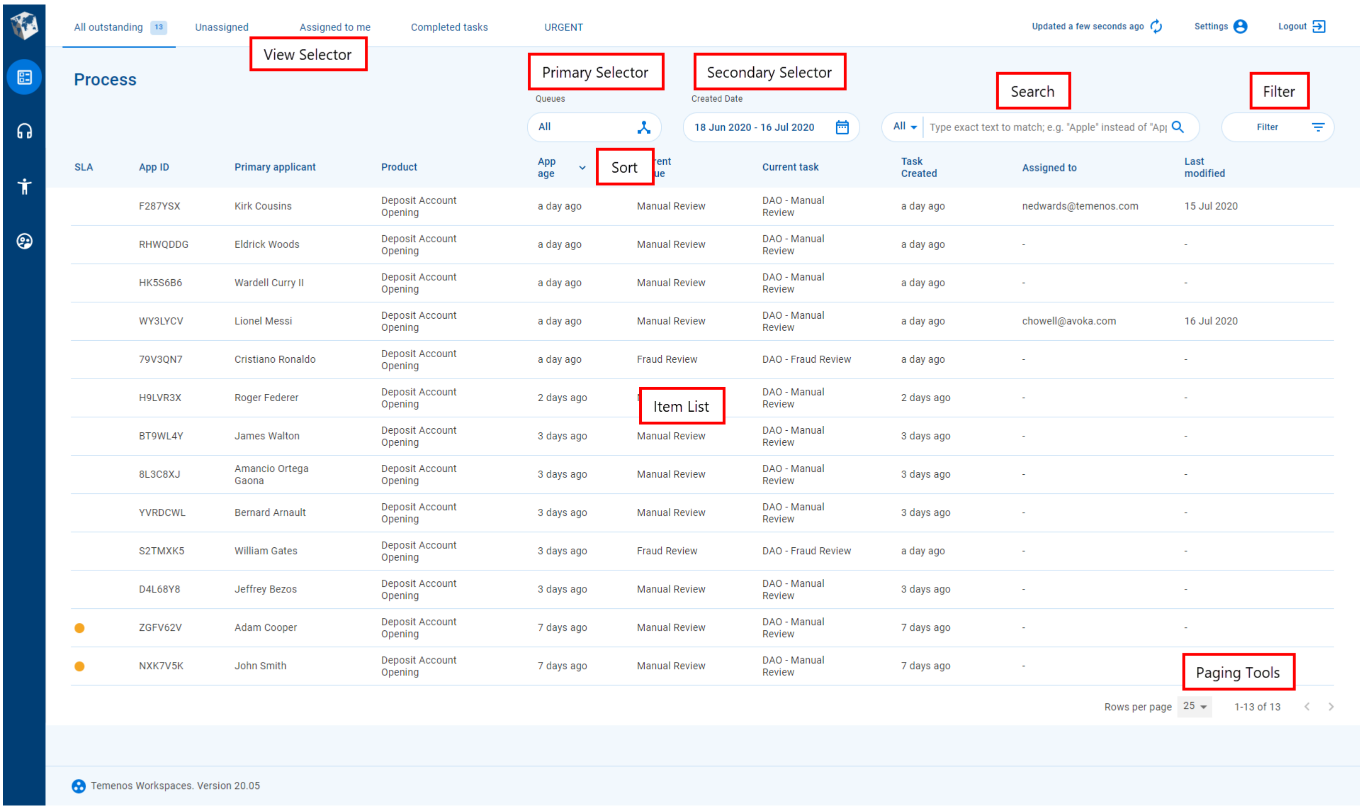
- [23.04]()
- [22.10]()
- [20.05 to 22.04]()
- [Prior to 20.05]()

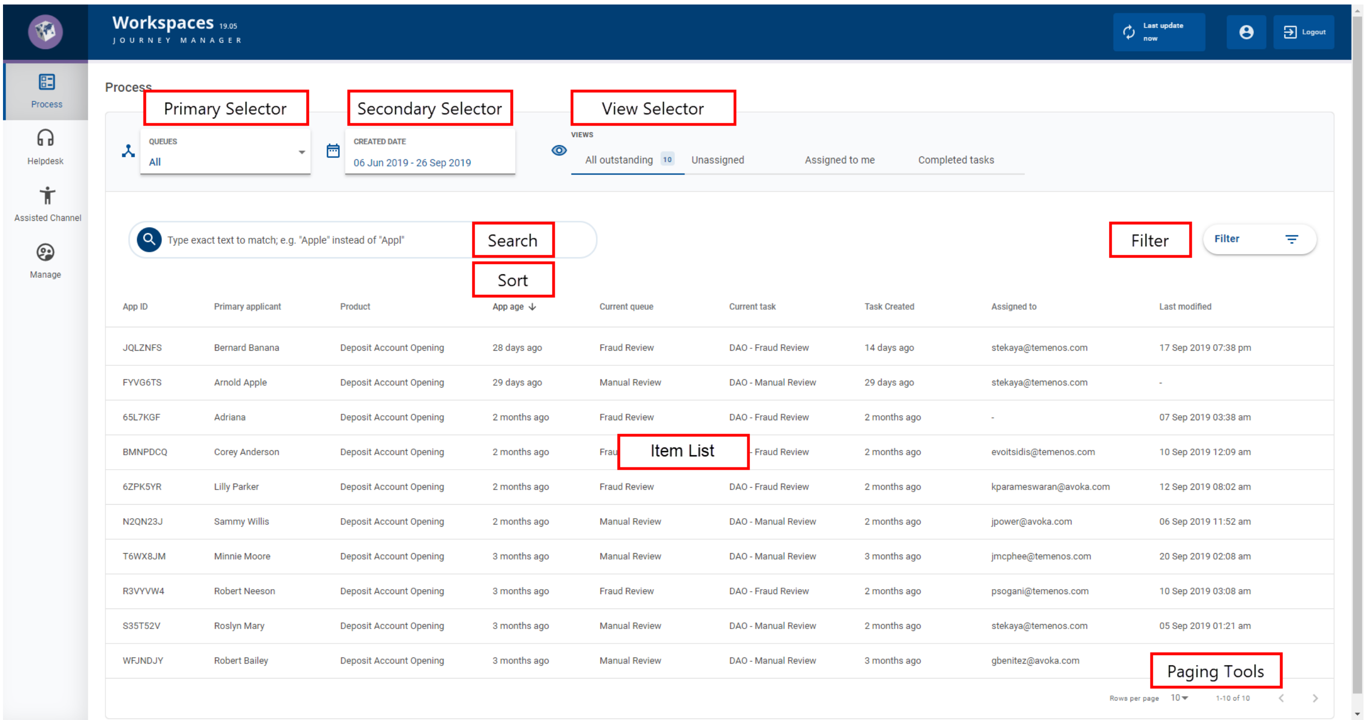



1. View Selector
2. Primary selector
3. Secondary selector
4. Search
5. View Filter
6. Bulk Action mode switch
7. Collapsed item list row
8. Expanded item listrow
9. Sort
10. Action buttons
11. Tooltip
12. Paging tools




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




The List screens for the 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 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 in rows and, optionally, additional information for each row when expanded. 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.

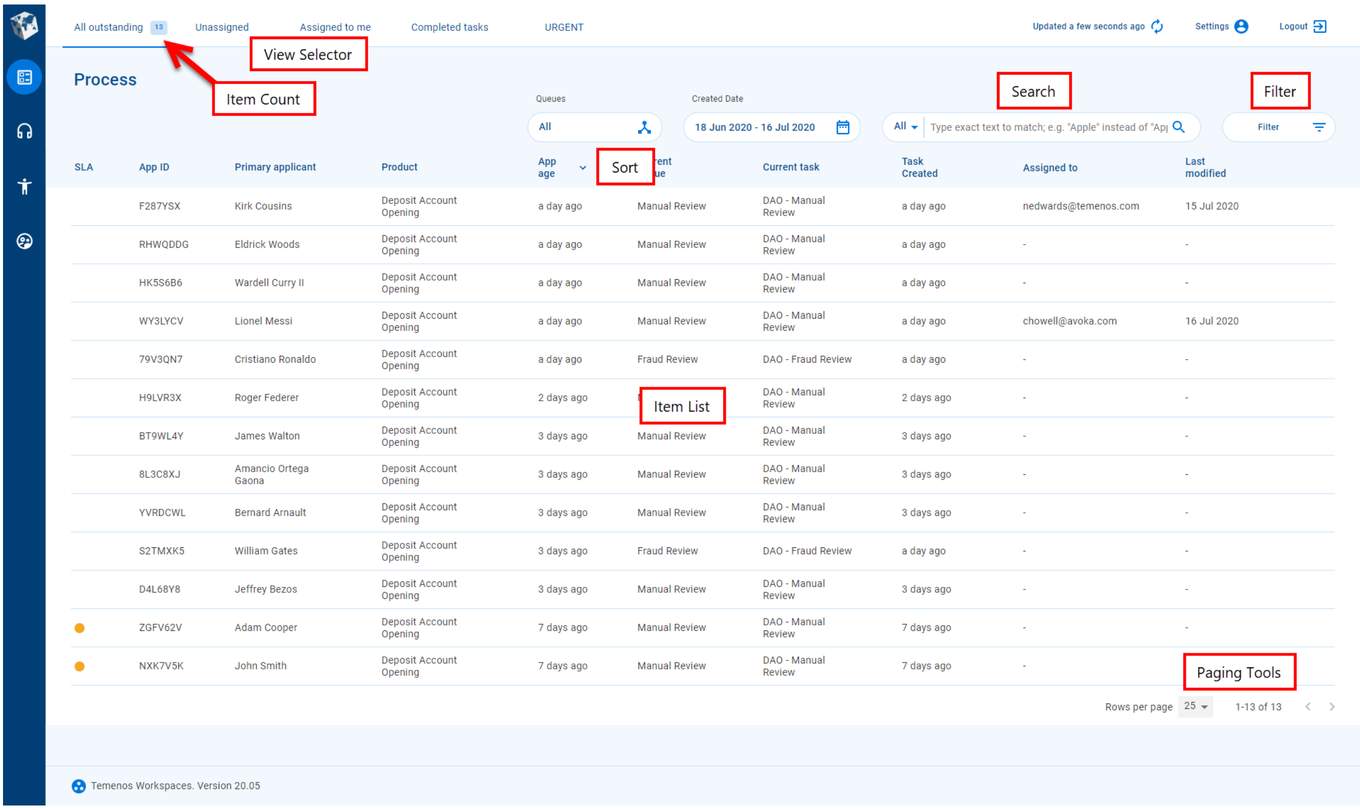
- The first global filter shows the name of the active queue (Review and Manage spaces) or form / product type (Helpdesk and Assisted Channel spaces), and lets you select another queue or form / product type so that you can work with other tasks or applications.
- The Created Date global filter lets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

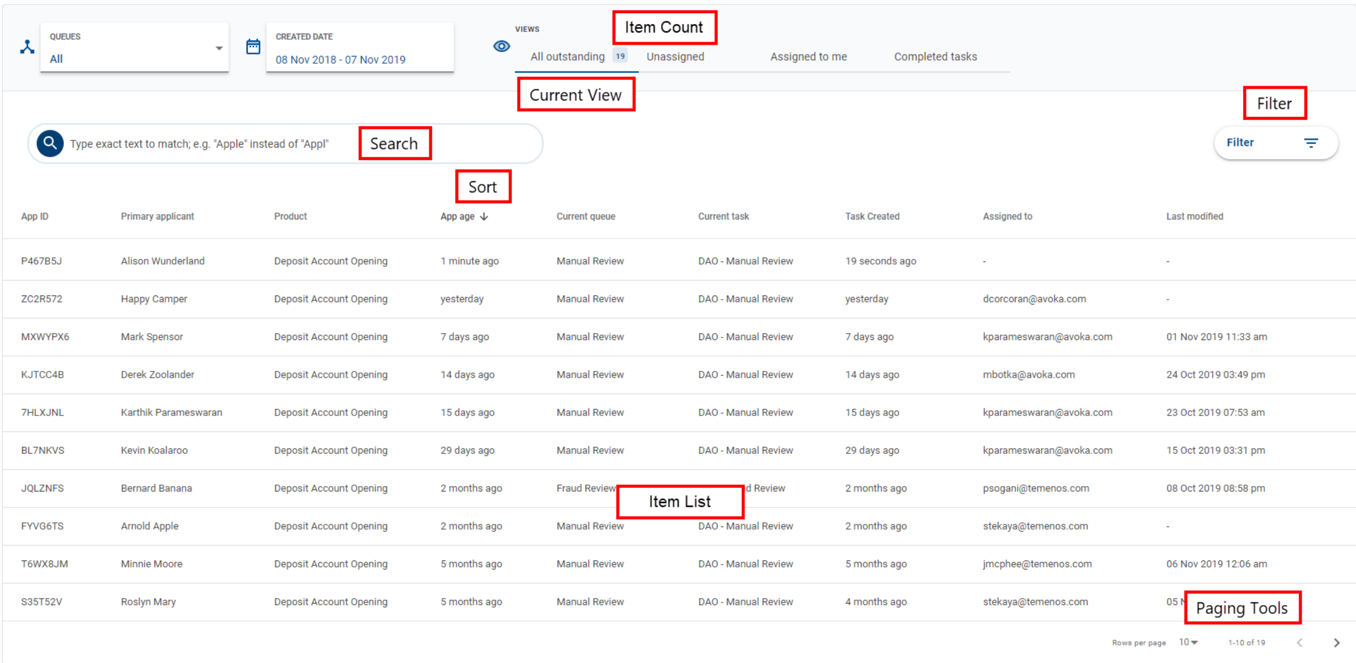
If you've selected global filters and a view, and you can't see the item you're looking for, you can further refine the list of items using the filter and sort options. Filtering restricts which items are displayed in the item list, and sorting determines the order items appear in the list. To learn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

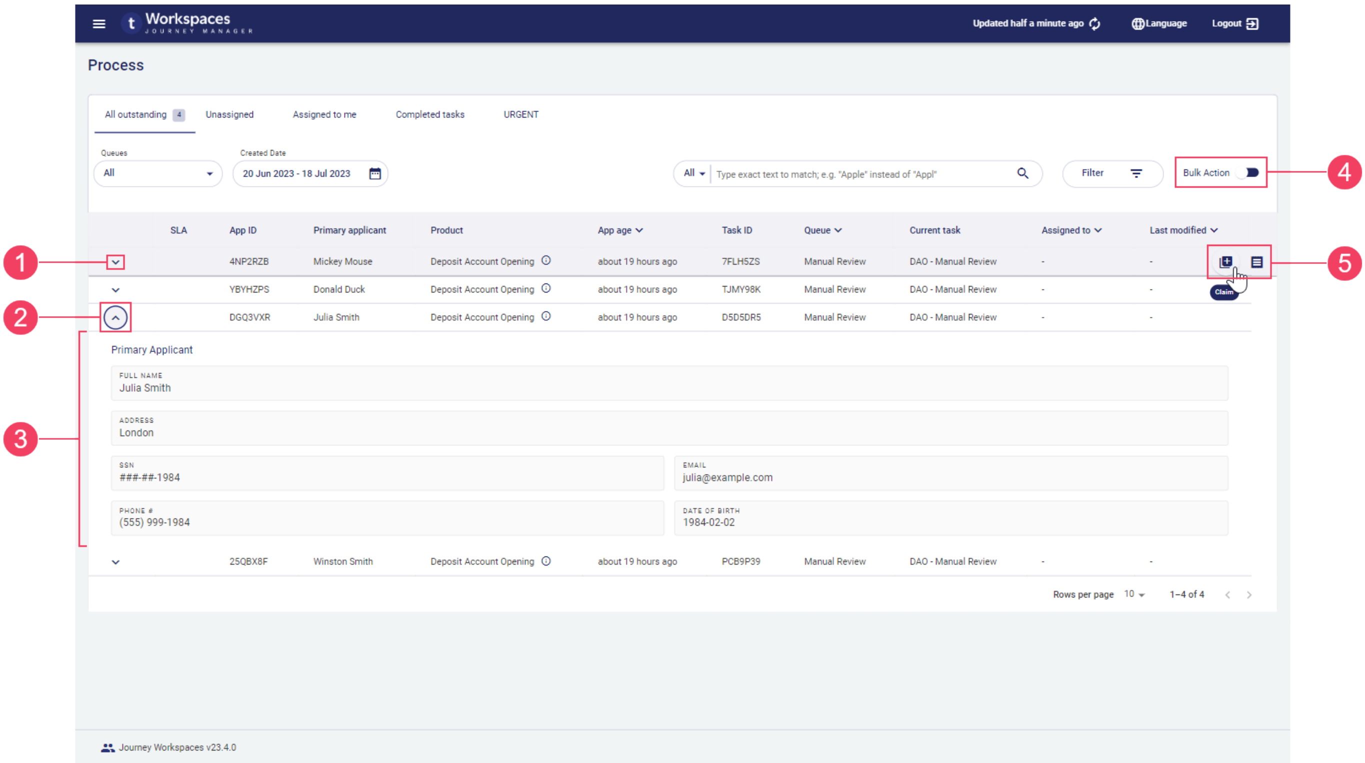




The number of items that satisfy all criteria for selection is shown as the Item Count next to the view name. The global filters, current view, search and filters all contribute to the calculation of the Item Count.

Once you’ve found the task or application that you’re looking for, there are several 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.
- Expand an item to see additional information about it in the item list. 23.04This feature was introduced in the 23.04 release
- Click an item to open it in the 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](#).




1. Expand row
2. Collapse row
3. Additional information
4. Bulk Action mode switch
5. Action buttons

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.

TIP

Some actions are only available from the Details screen. If an action you're looking for isn't available in the item list, try selecting the item to see 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 corresponds to a single task or application, while each column shows a different kind of information to help you identify what you're looking for.

Each item list column shows a single value but this can be limiting for some kinds of information. To improve this situation, additional information can be displayed in a tooltip. When available, a tooltip is indicated by a infoTooltip icon. To view the tooltip, point your mouse at the infoTooltip icon. 22.10This feature was introduced in the 22.10 release

As an example, say you have an application type covering multiple optional products and you have a Product column in the item list. If an application includes multiple products, only the first product is displayed in the Product column. In this scenario, a tooltip could be configured to show all products included in the application.

In some spaces, an item list row can be expanded to display even more information about the application or task it represents. Expansion rows are useful because they can present custom content that may include more and different kinds of information than what is shown in the item list columns. Expansion rows are indicated by the expand_moreExpand row and expand_lessCollapse row icons at the start of a row. Click a row's expand_moreExpand row icon to expand it. To close an expanded row, click the row's expand_lessCollapse row icon. Only one row can be expanded at any time, so if a row is already expanded when you click a row's expand_moreExpand row icon, the previously expanded row is collapsed.

INFO

The information displayed in each column and expansion row is configurable, so what you see in your Workspaces portal may differ from the default configuration.

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

- Tasks are sourced from the active queue, or applications correspond to the value of the form / product typeglobal filter.
- Items were created within the range of dates covered by the Created Date global filter.
- Items match the filter criteria imposed by the current view.
- Items 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:

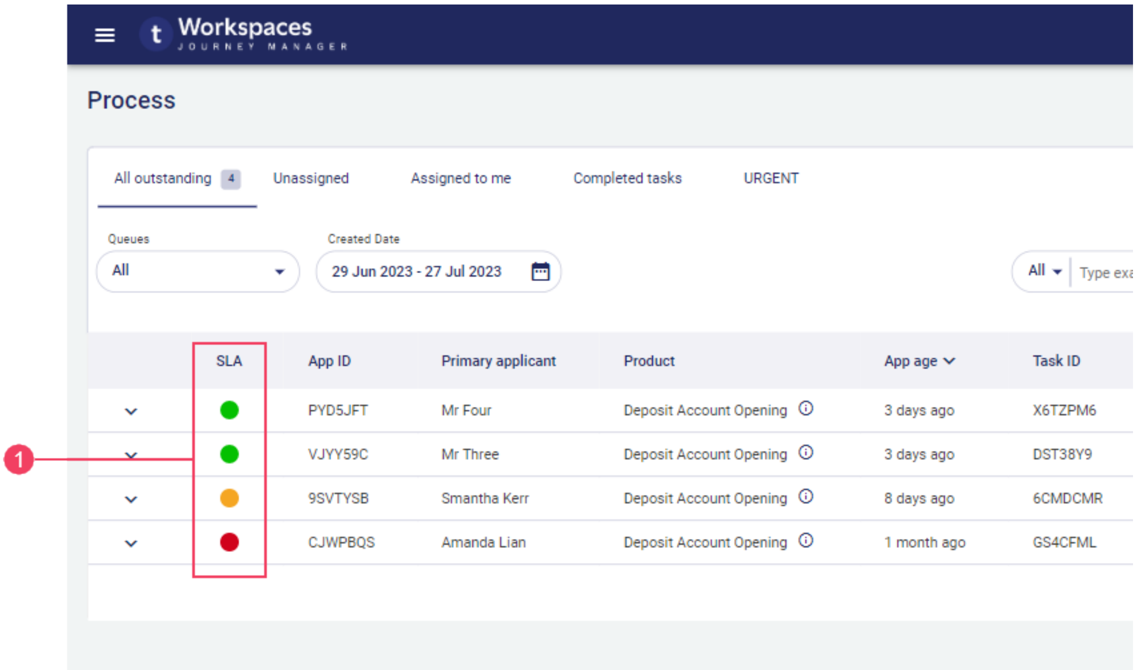
- **Review and Manage spaces:** The item list is populated with tasks for submitted applications sourced from the active queue, and that satisfy the common criteria.
- **Helpdesk space:** The item list is empty initially; search for an application ID to populate the item list with saved or submitted applications that match the selected form / product type, and that satisfy the common criteria.
- **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 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 SLA indicator in the item list. A text version of the SLA indicator may also be available, showing how application processing is progressing relative to the SLA.




1. SLA indicators

The SLA indicator changes color over time as the application is being processed. The colors used and what they mean are specific to your Workspaces portal.

If your SLA requirements are simple, your Workspaces portal may be configured with a basic two-color SLA.

## Basic SLA

The basic SLA is based on pre-defined values for the amount of time available to process each application, and when to provide a warning that the SLA is in danger of being breached. To learn more about the basic SLA, see Basic SLA.

The SLA indicator changes color over time as the application is being processed. The colors used by the basic SLA and what they mean are as follows:

- **No indicator:** The application is being processed in a timely fashion within the terms of the SLA.
- 🟠 **(SLA Warning):** An SLA breach is imminent.
- 🔴 **(SLA Alert):** The SLA has been breached.

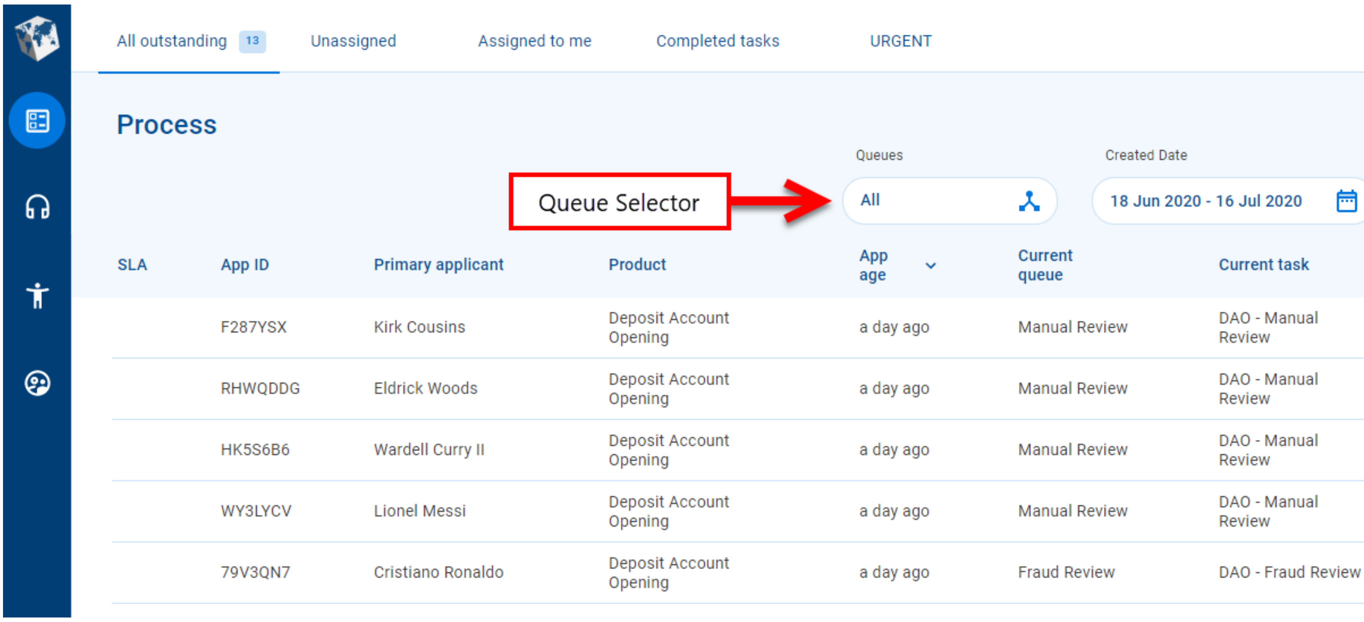
## Queue selector

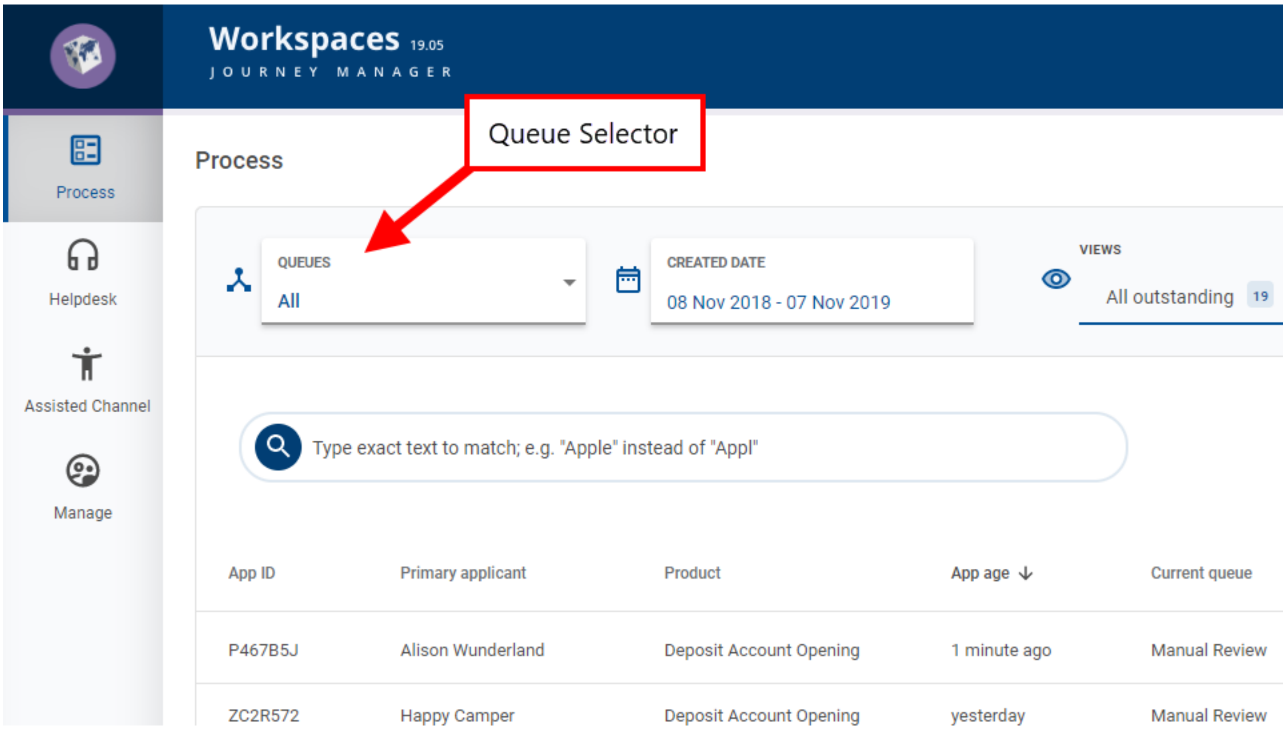
In the Review and Manage spaces, the List screen allows you to interact with tasks from any queue that you can access. The Queues selector identifies which queue is currently used as the source for populating the item list. You can select another queue from the Queues selector if more than one queue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

NOTE

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

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






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

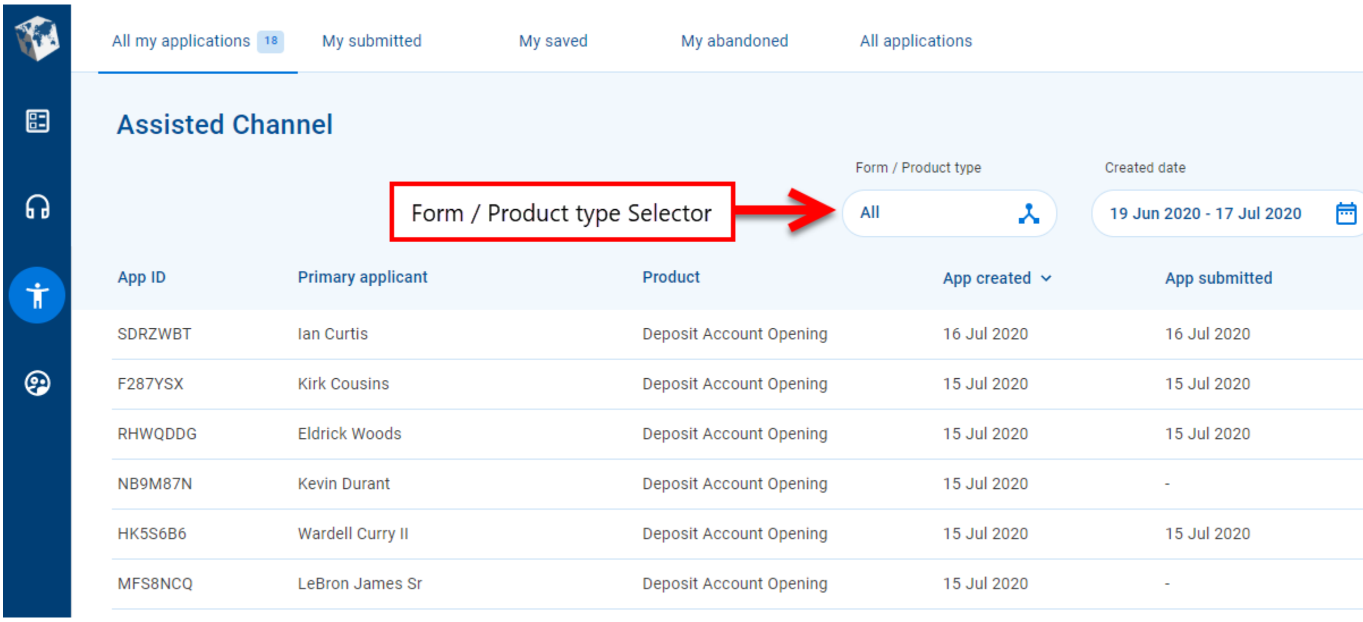
## Form / Product Type Selector

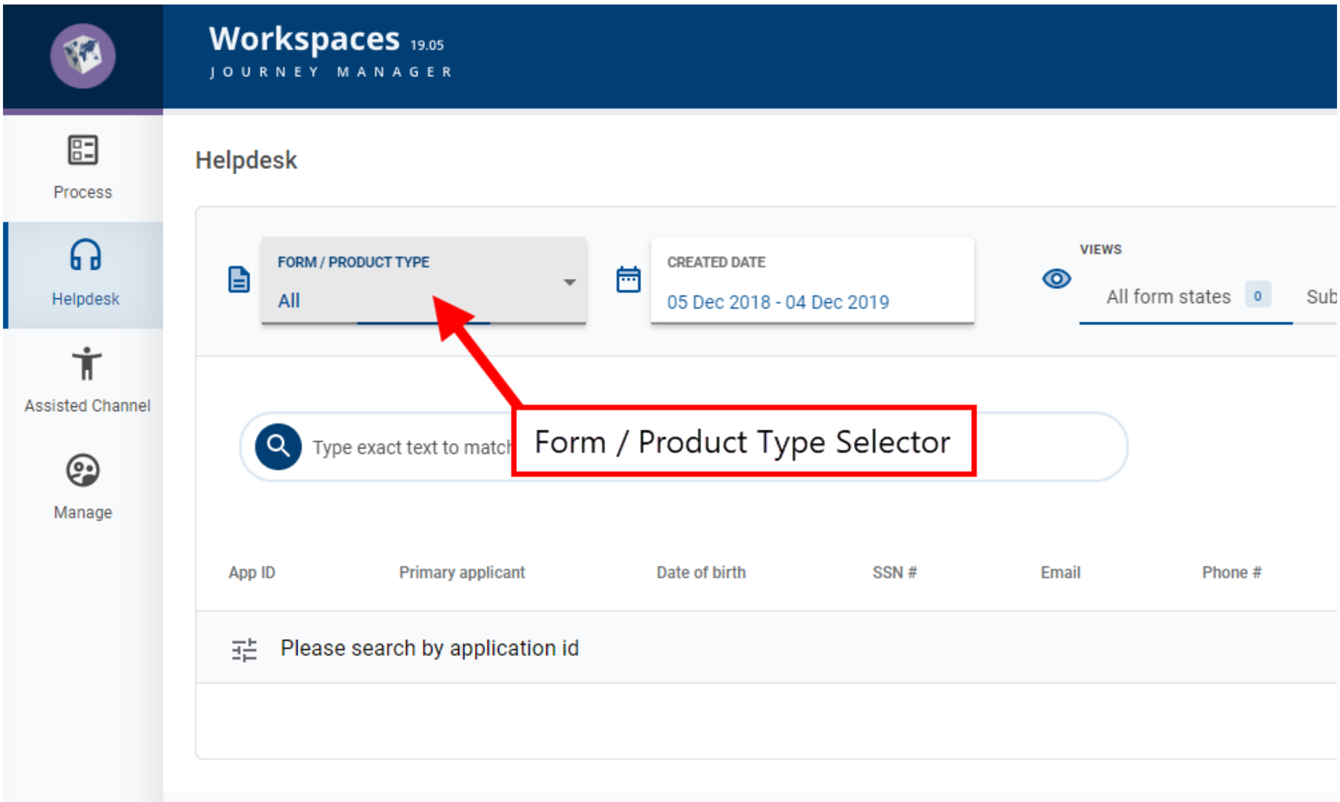
As mentioned above, the first global filter applied to the List screen in the Helpdesk and Assisted Channel spaces is for a form / product type. The Form / Product Type selector identifies the currently selected form / product type, and allows you to select another form / product type to apply as a global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

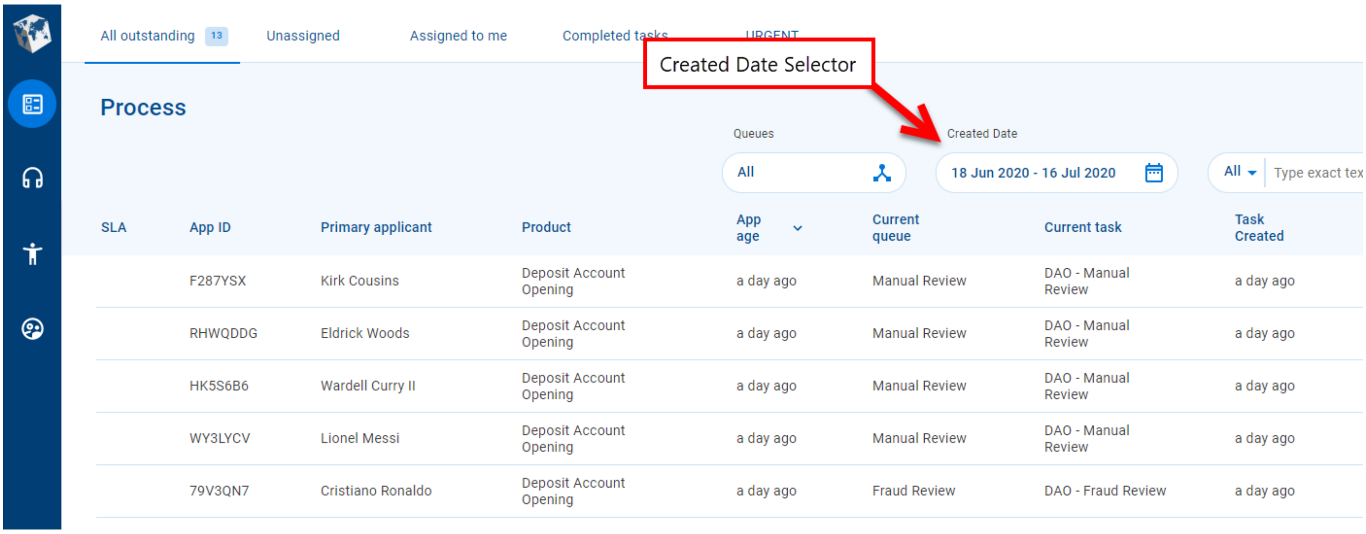
The available form / product type values are listed in the Form / Product Type selector's dropdown list as well as an All item. You can choose any form / product type from the dropdown list to be applied to the item list. If you choose All, the item list is populated with applications for all form /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

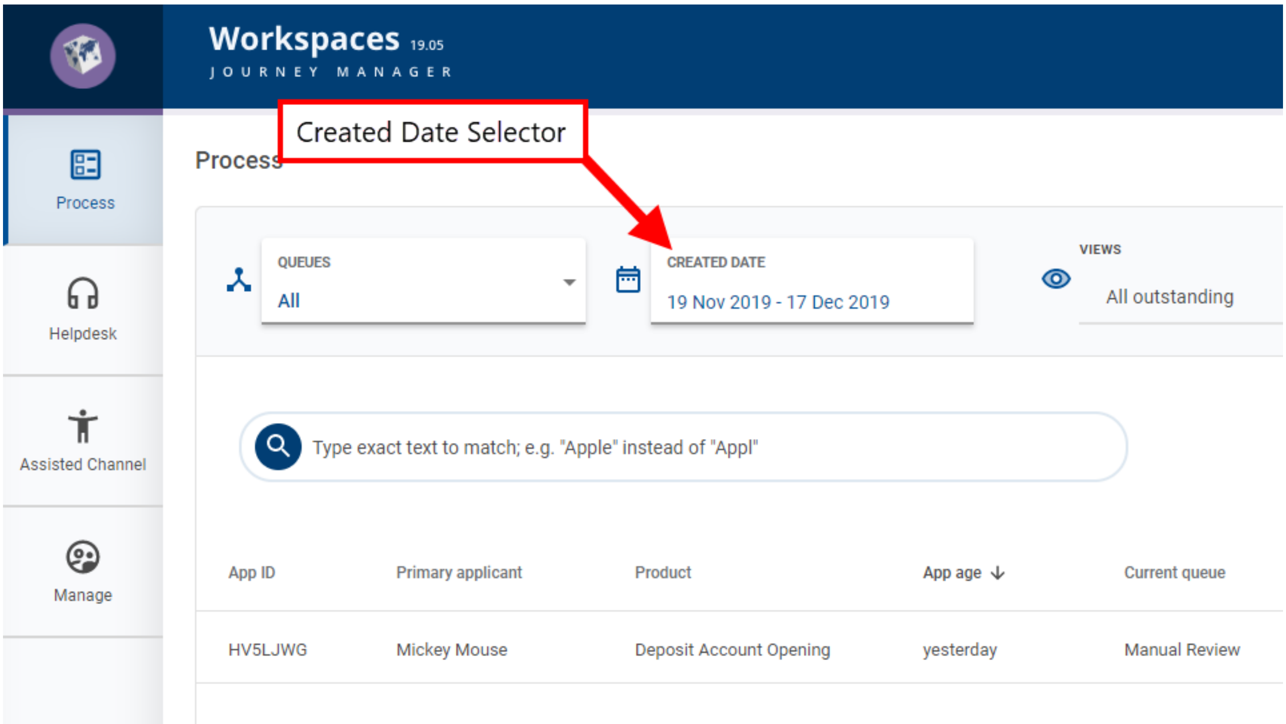
A form / product type item may represent a form group. When a form group is selected, the specific form associated with each task is displayed in the item list's Product column. 22.10This feature was introduced in the 22.10 release

## 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



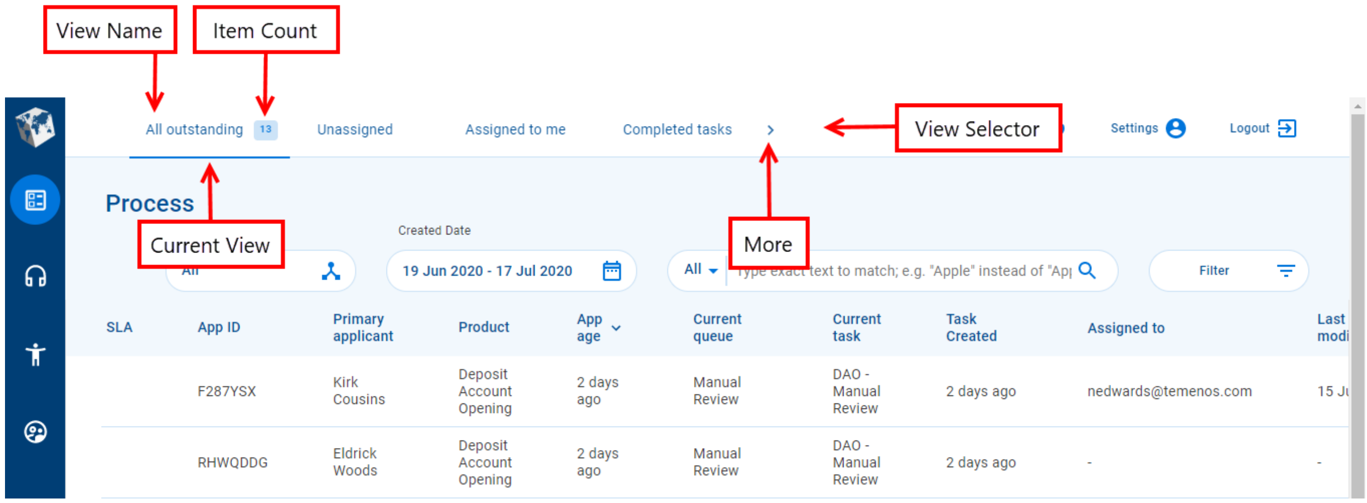


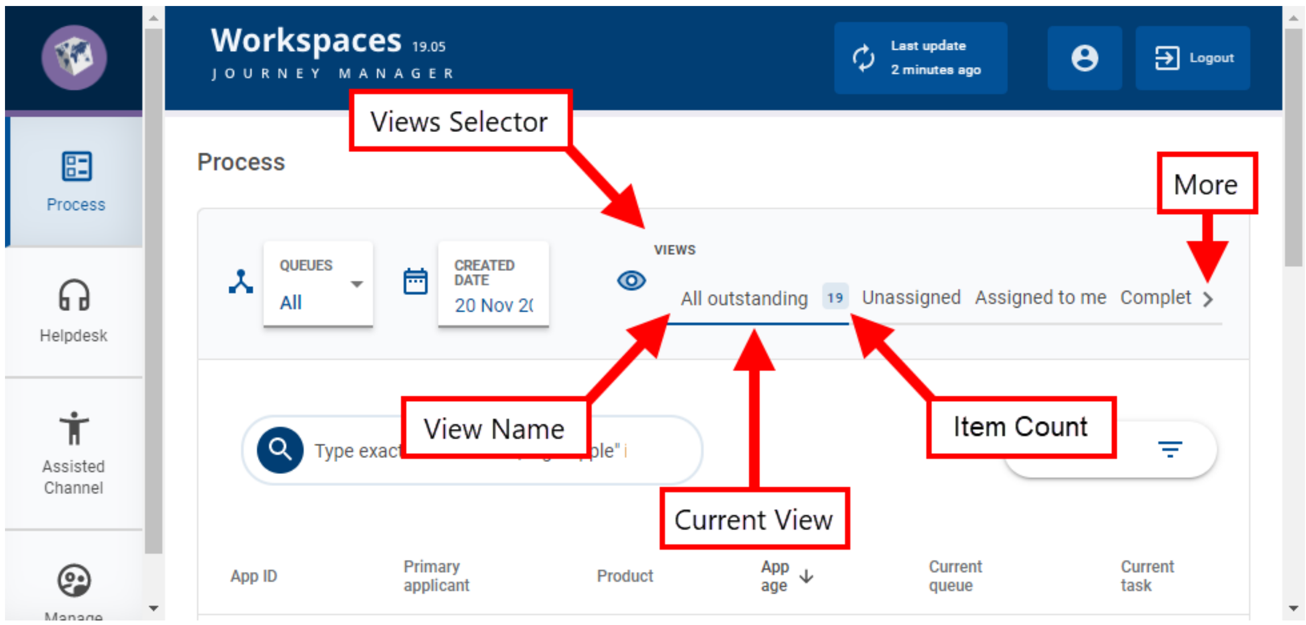

The default creation date filter restricts the tasks or applications displayed in the item list to just those that were created in the last 30 days, including the current date, and this filter is applied the first time you access the List screen. You can select a different creation date filter using 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 84.

## 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.

> INFO
>
> Information in a List screen expansion row cannot by found by searching or filtering.

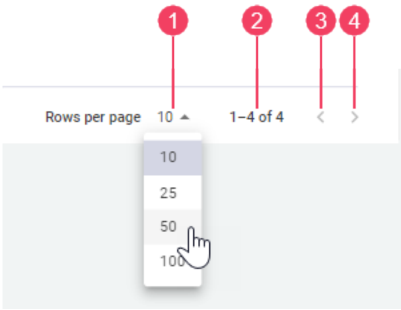
Search and filter are similar in that both reduce the number of items by matching values and fields. However, there are some key differences between these two features:

- 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 84.

## 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.




1. Rows per page
2. Items in list / Total matching items
3. Previous Page
4. Next Page

The navigate_beforePrevious Page and navigate_nextNext 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_beforePrevious Page tool is disabled when the first item list page is displayed; similarly, the navigate_nextNext 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.

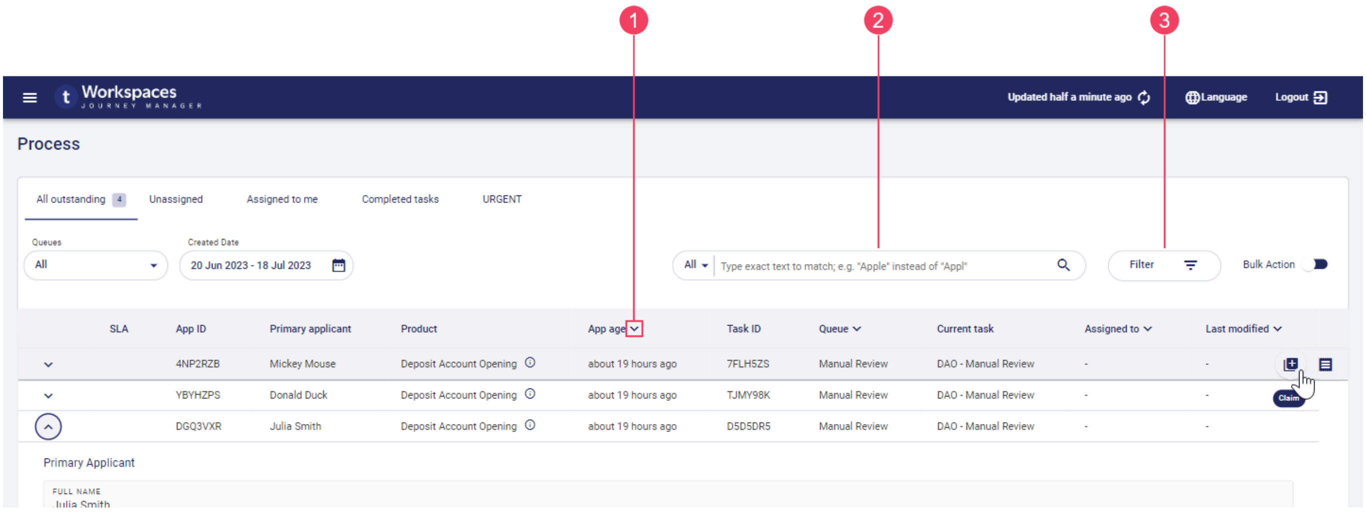
# Finding tasks and applications

NOTE

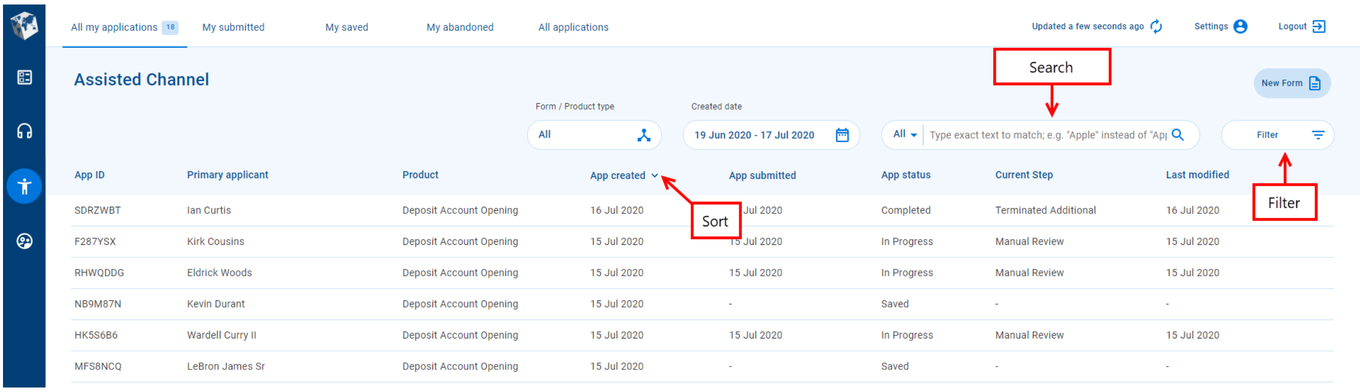
Some of the text and images below may not match what you see in your Journey Workspaces app. This is because the features described are based on a default Journey Workspaces configuration, and your Workspaces app may be configured differently; for example, with your company's branding, with fields for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

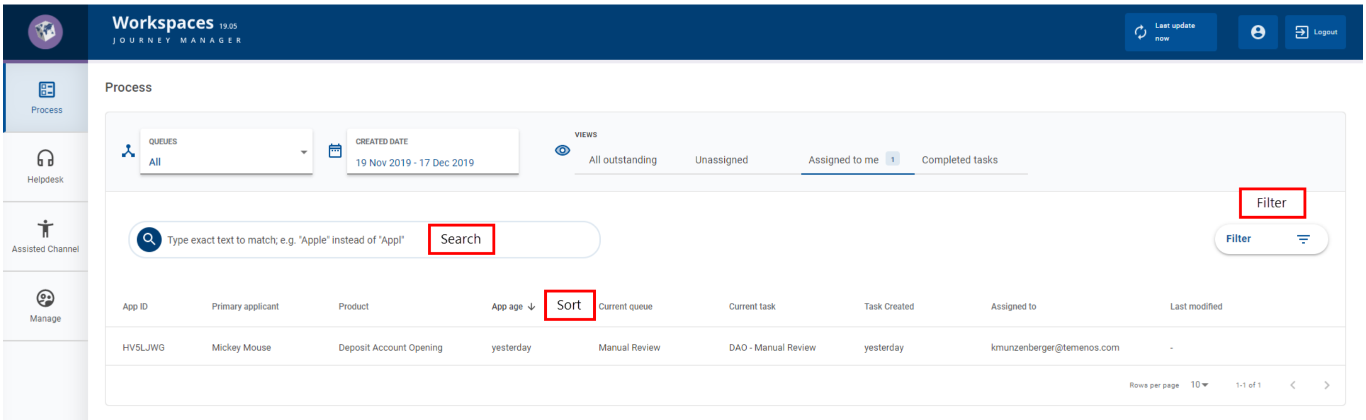
The Workspaces item list shows tasks from the active task queue (Review and Manage spaces) or applications for a selected form / product type (Helpdesk or Assisted Channel spaces) that also satisfy the criteria defined for the current view. This may still result in a large number of tasks which you might 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.


- 23.04 and later
- 20.05 to 22.10
- Prior to 20.05


1. Sort
2. Search
3. Filter




INFO

Information in a List screen expansion row cannot by found by searching or filtering.

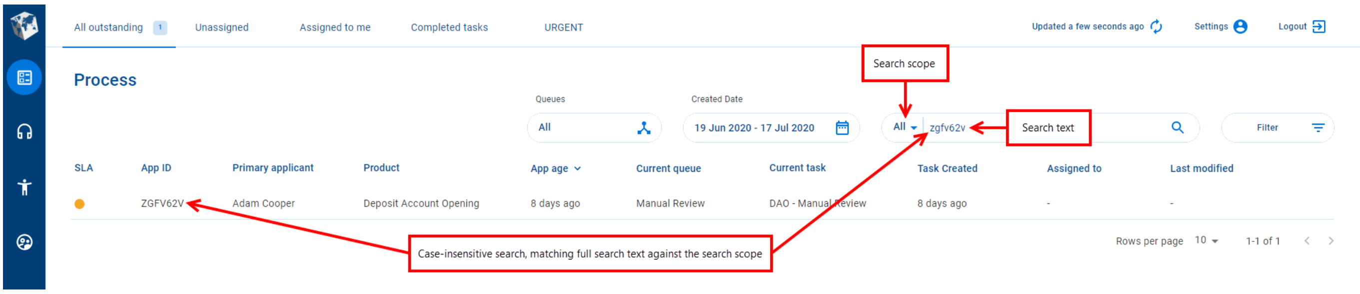
Searching and filtering are similar in that both reduce the number of items in the item list by matching desired field (column) values. However, searching differs from filtering in a number of ways:

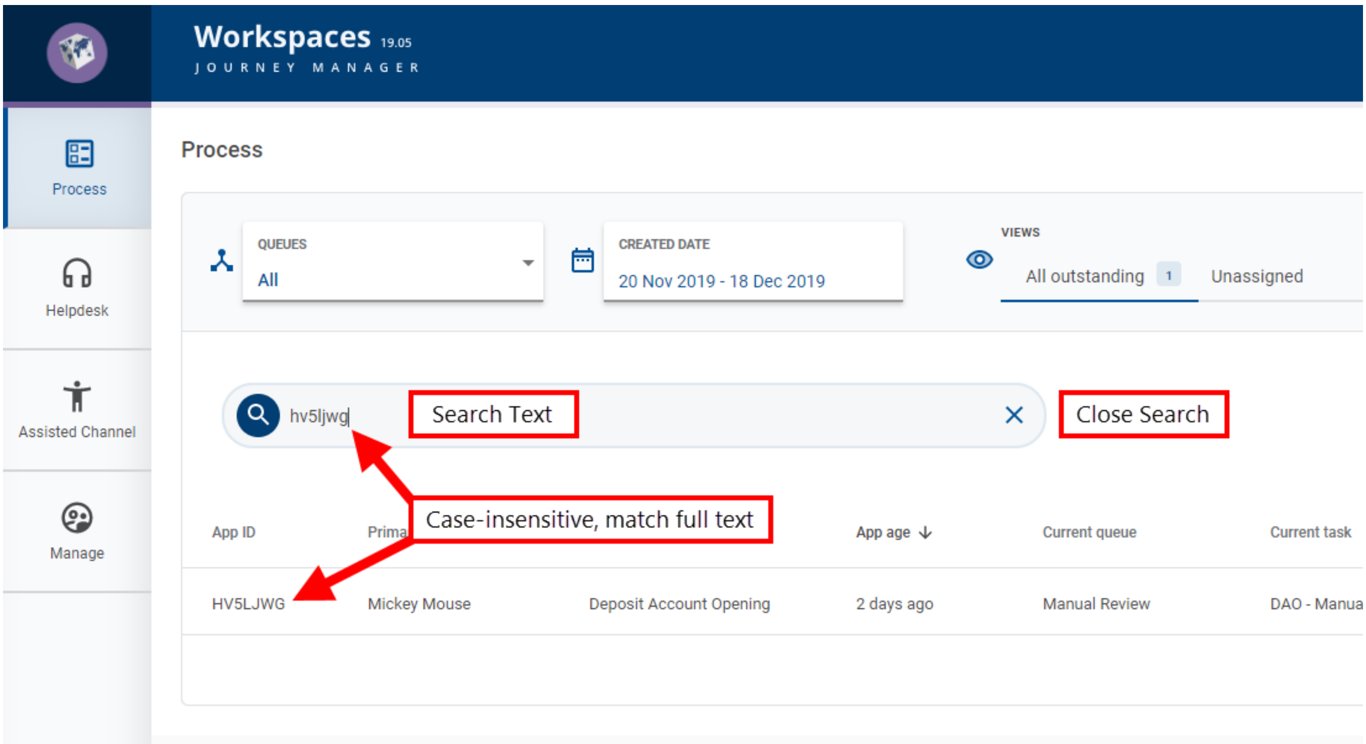
- Searching can target one field or all fields, whereas each filter is targeted at a single specific field.
- When searching on one field, the user can choose which field to target, whereas each filter is targeted at a fixed predetermined field.
- When searching on all fields, the same search text is 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 searchSearch. 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 searchSearch 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 searchSearch 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.

Searching is case-insensitive, treating uppercase and lowercase characters as the same, and only finds items that match the search text exactly (ignoring letter case). Partial match is not currently supported.

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. Note that simply deleting all of the search text in the searchSearch box does not clear an active search. To clear a search, follow the instructions for your Workspaces version:

- **Workspaces 22.04 and later:** Click the closeClear Search button.
- **Workspaces 20.05 and 21.11:** Delete the search text, and click searchSearch or press `Enter`.
- **Workspaces 19.11 and earlier:** Click closeClear Search, or select any space which reloads the List screen.

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. You can tell that the search is still active by the text and the closeClear Search icon in the **Search** field.

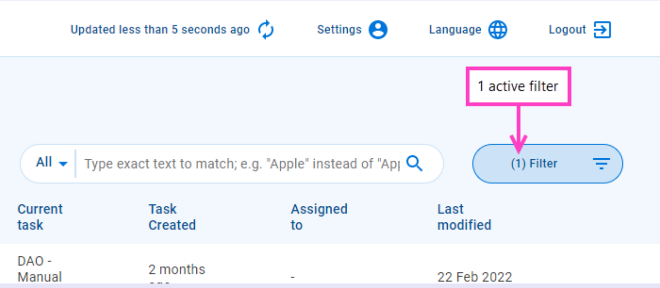
## Filter the Item List

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.



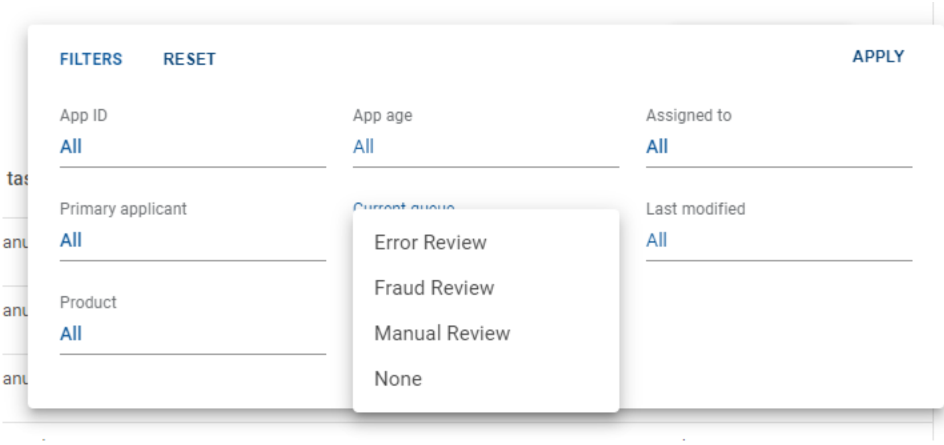

To view the current filters, click the filter_listFilter button. The Filters selector is displayed showing all the filters that are currently applied to the item list. Each filter allows you to select a value or set of values to compare against the column.

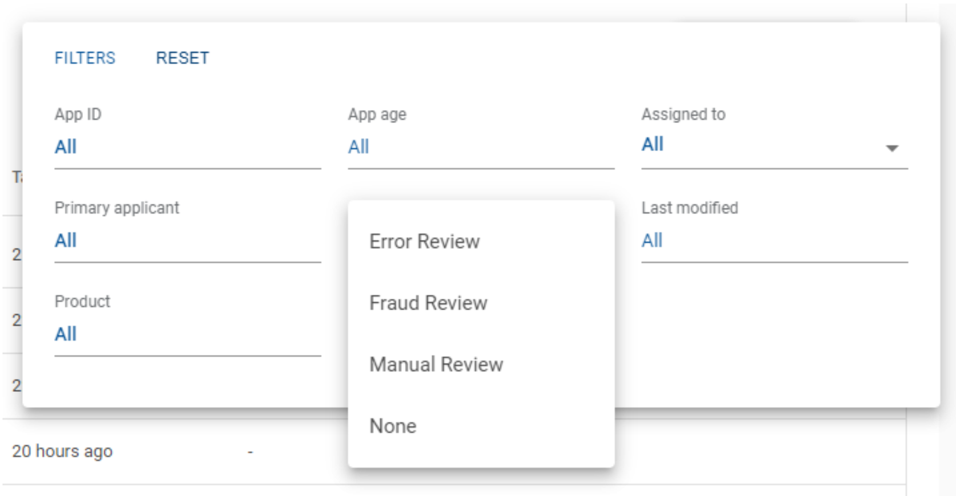
Workspaces supports several types of filter.

- **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



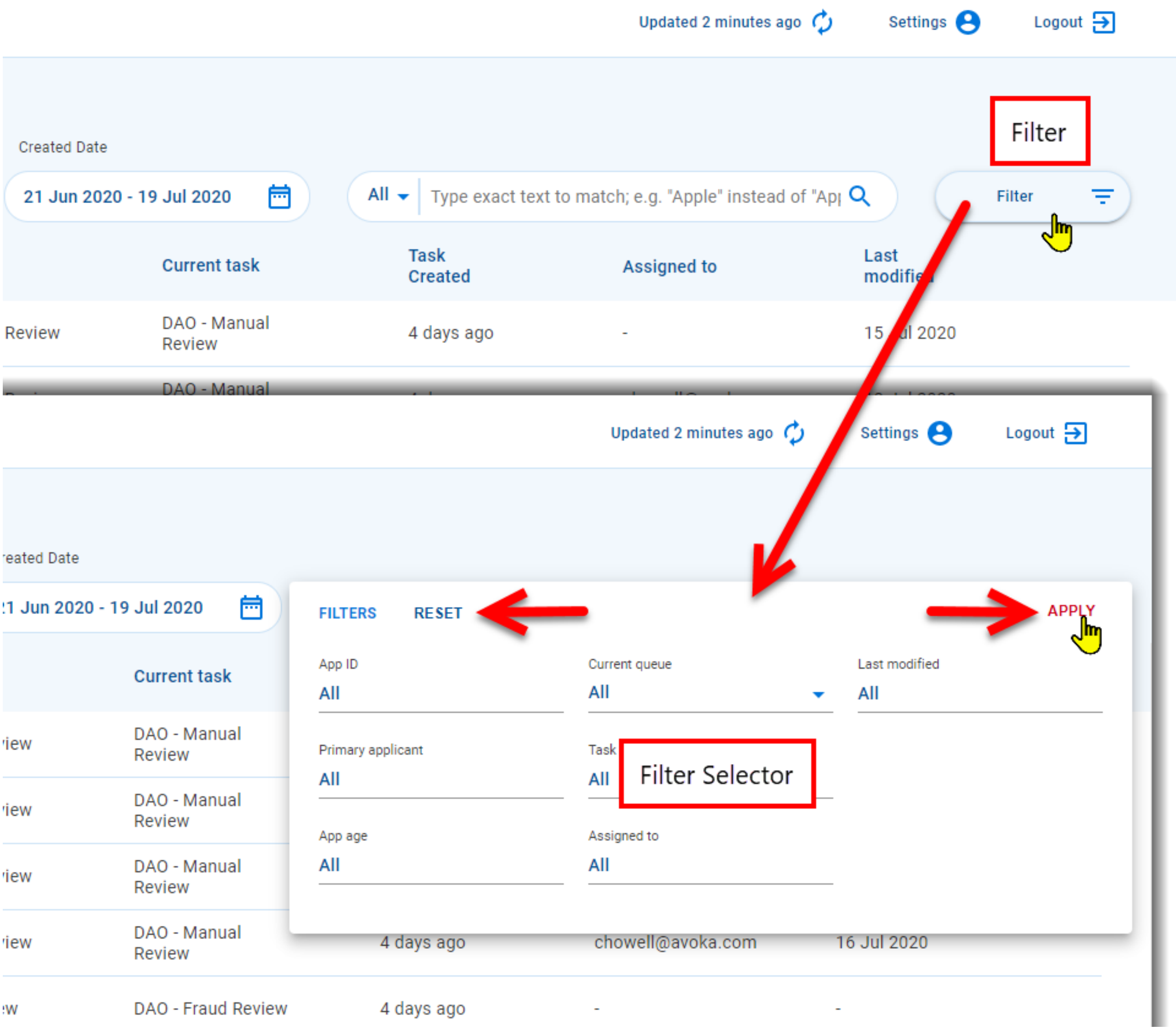



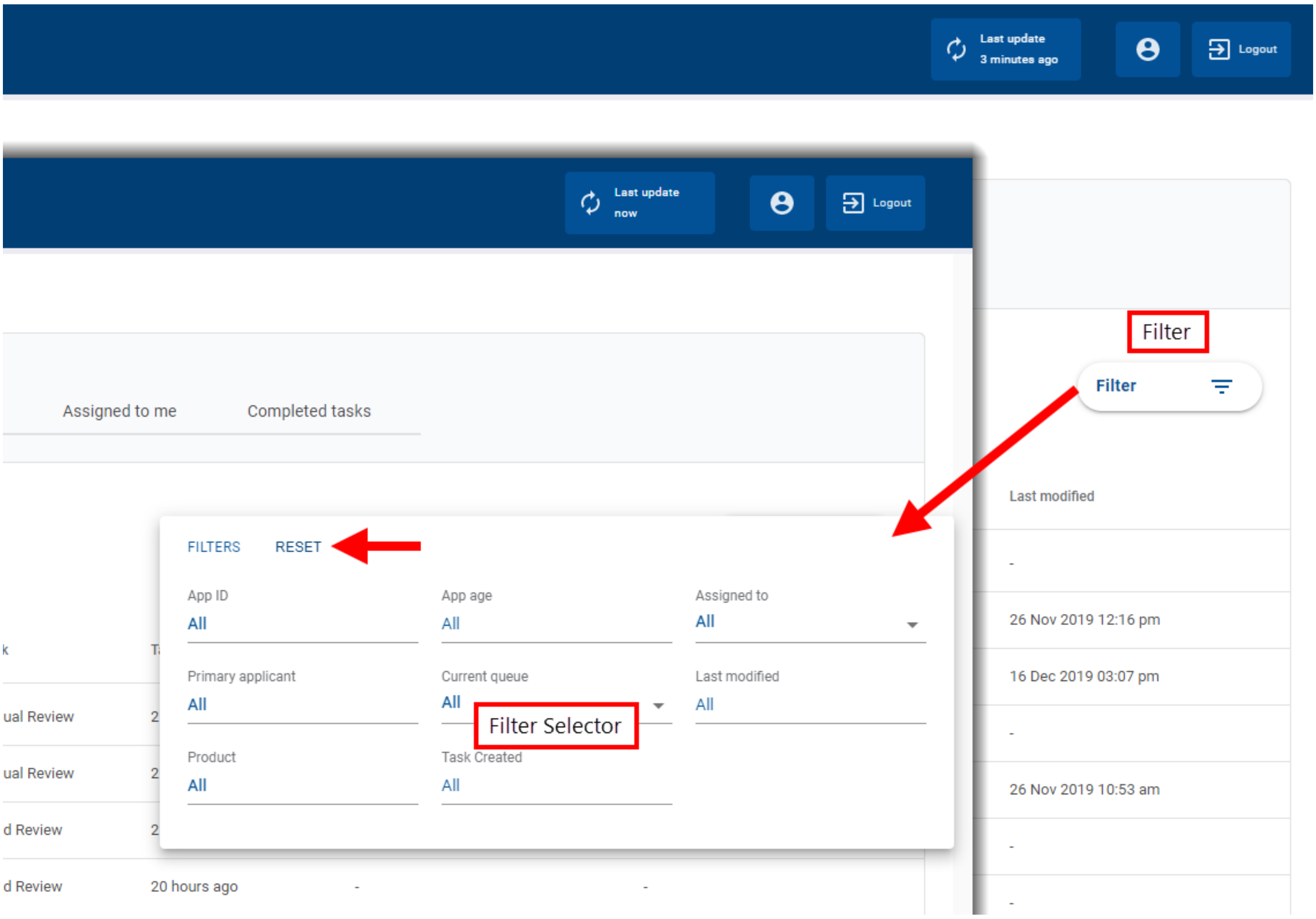

To apply a filter to the item list, click filter_listFilter (1) to display the Filters selector then select the filter values you want to apply from the various filter items (2,3) and click Apply (4). Click outside the Filters selector to close it. The number of active filter items is displayed on the 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
-
15 Jul 2020
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
DAO - Manual Review
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.

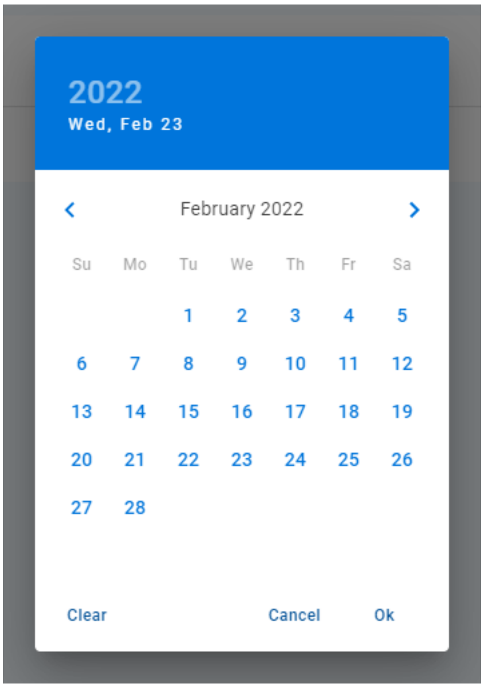
You can filter on a single date regardless of configuration. To filter on a single date:

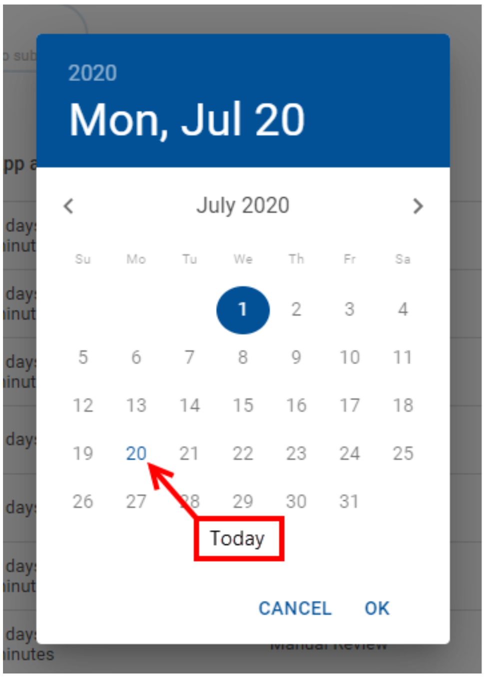
- **Date picker:** Simply click the date you want to filter on.
- **Date range picker:** Click the same date twice to select a one-day date range.

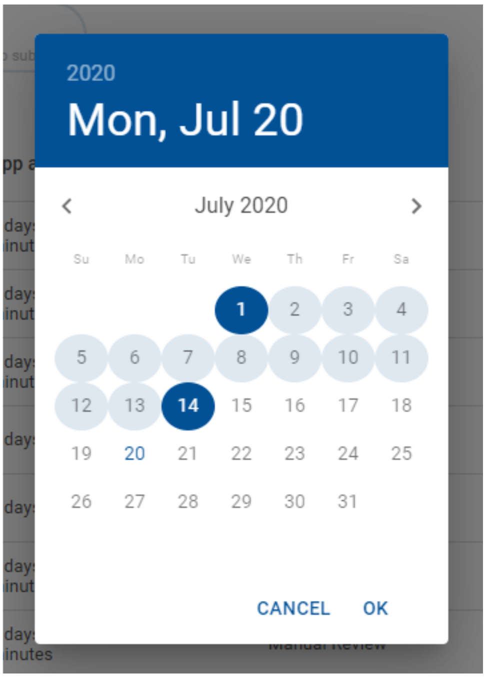
To filter on a date range, click the first date (4) then click a second date (5) to define the desired date range. You can click the dates in any order; you don't have to click the earlier date first.

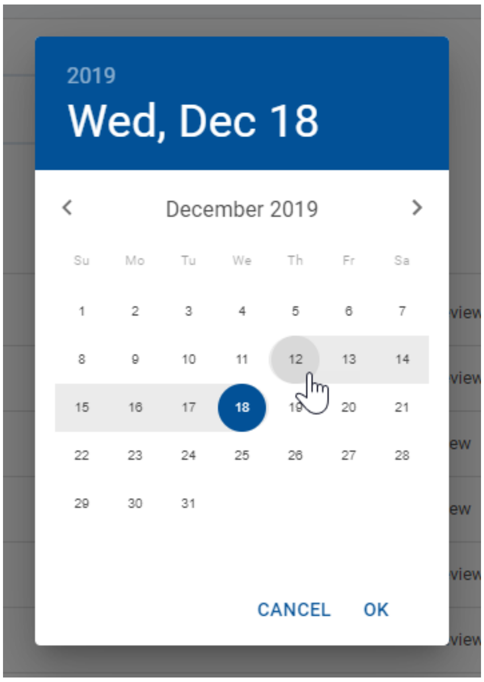
When selecting a date, use navigate_beforePrevious Month or navigate_nextNext Month to browse to and select dates in other months. Once you've selected the date or dates for the filter, click OK (6) to apply the date filter.

- 21.11
- 20.05
- Prior to 20.05





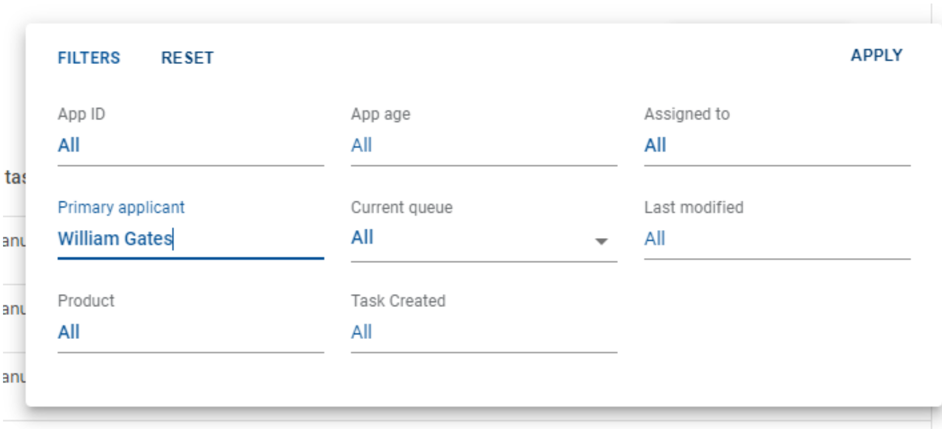

## Text Filters

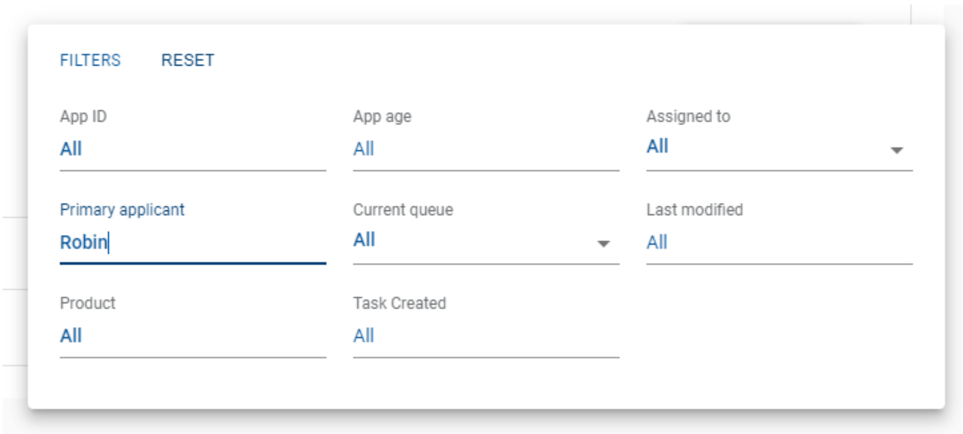
To filter on a text field, click the field in the Filters selector and enter the filter value. In Workspaces 19.11 and later releases, click Apply to make the filter active.

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.

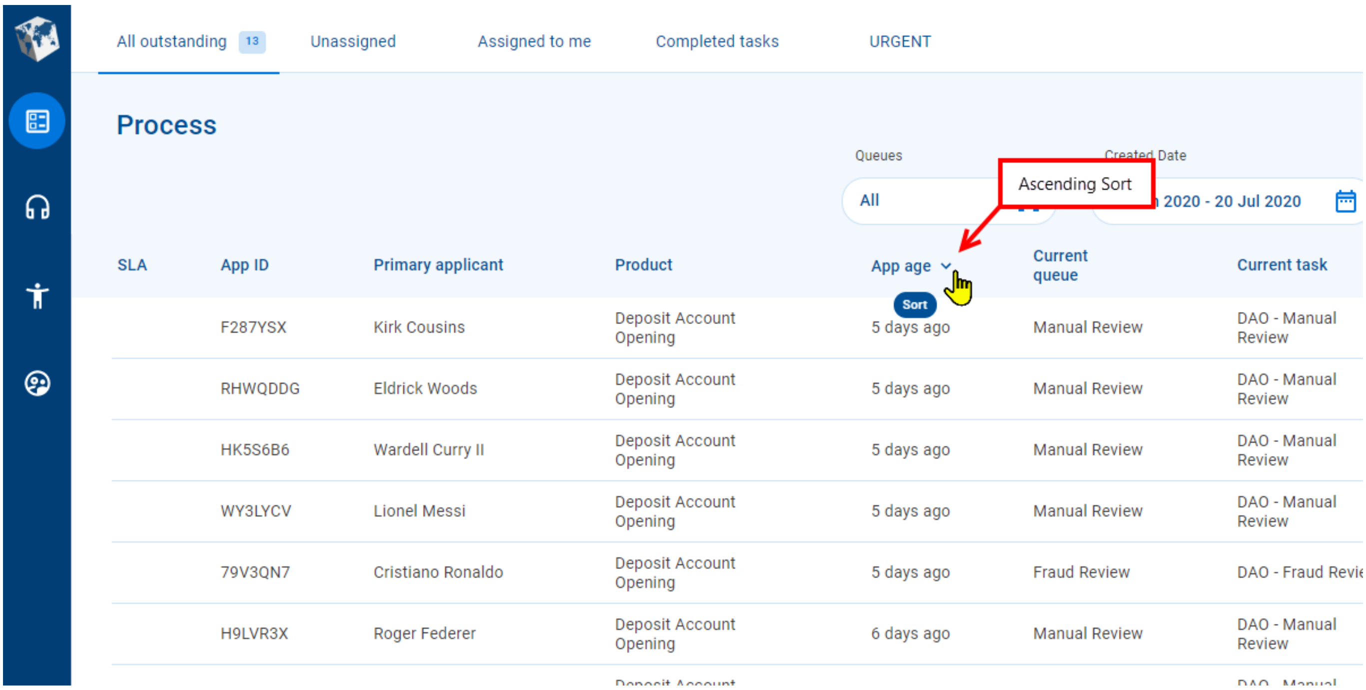
NOTE

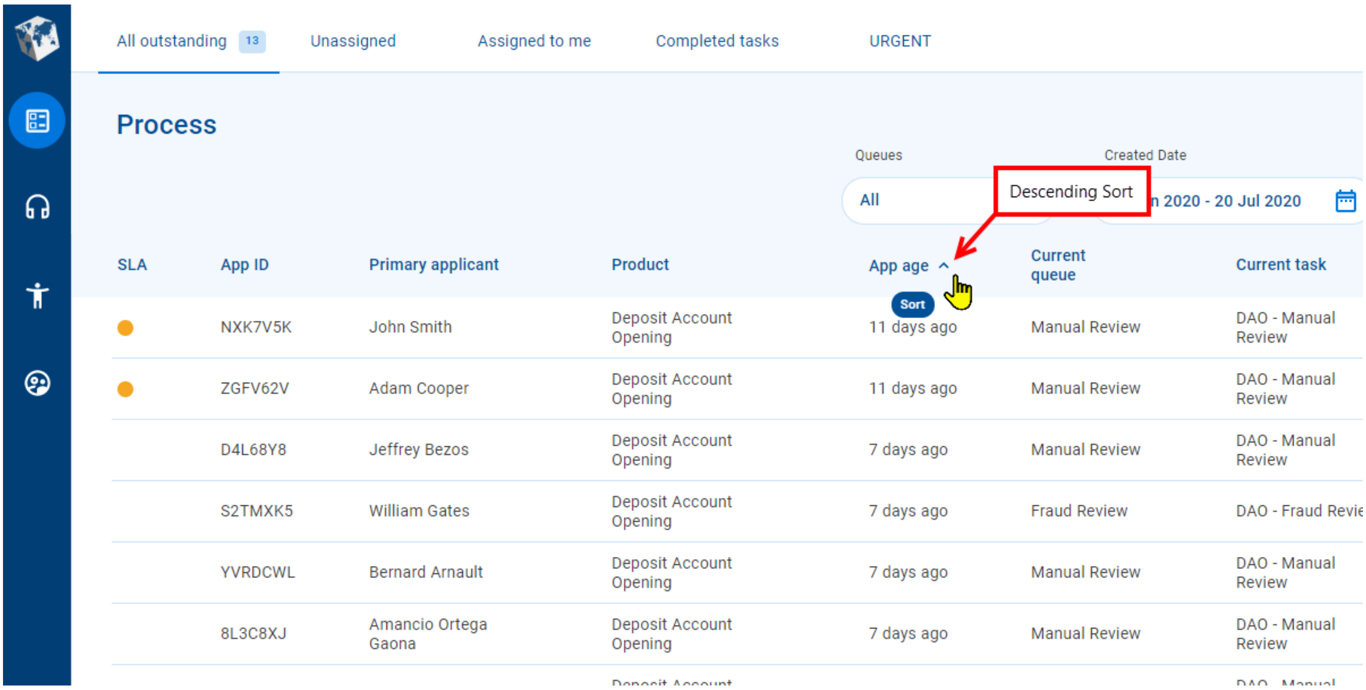
When you clear all filters, the current view remains selected and any filters defined for that view are still applied or re-applied if you had changed them.

## 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 expand_moreSort Ascending icon indicates the item list is sorted by the column values in ascending order, while expand_lessSort 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

NOTE

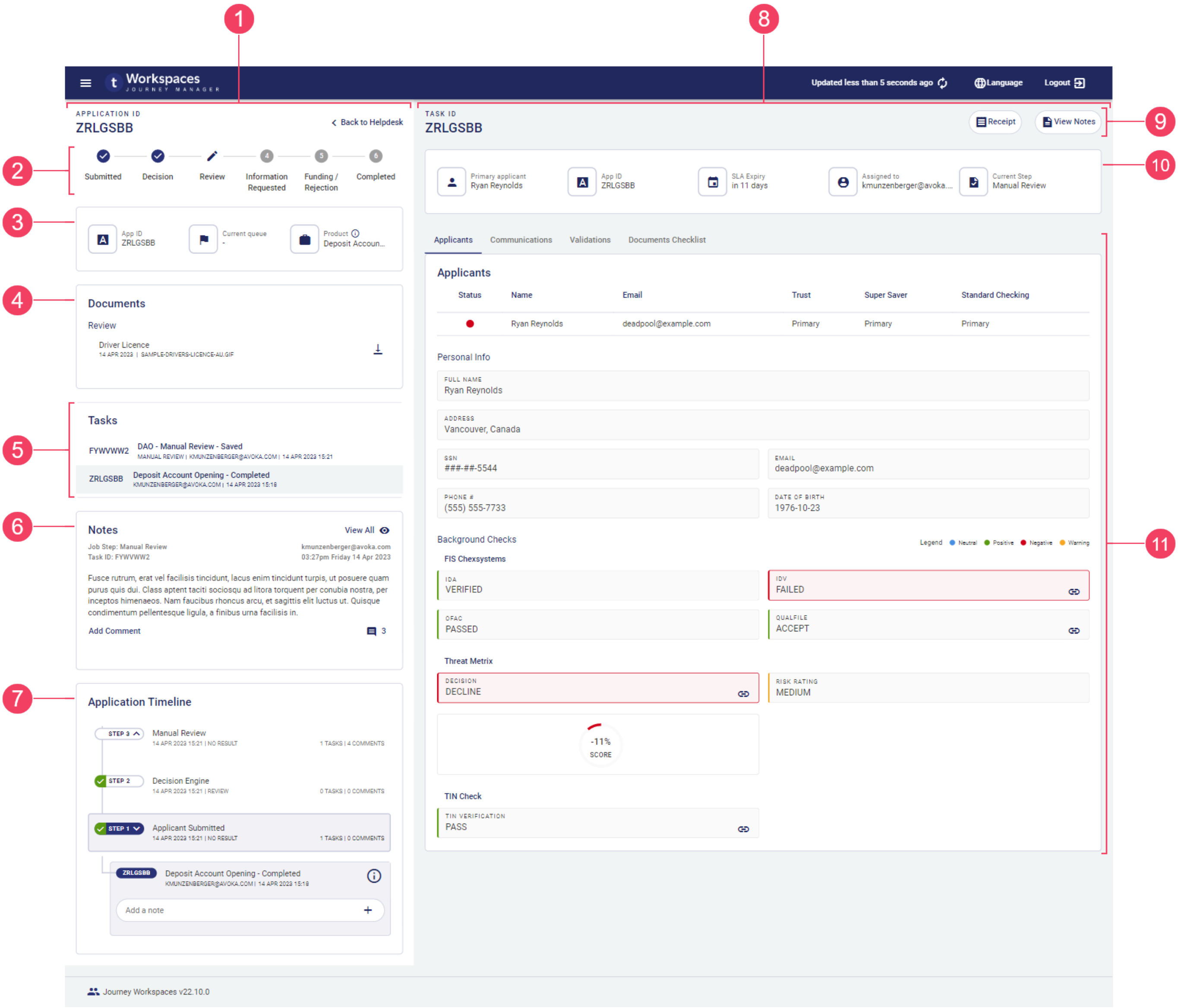
Some of the text and images below may not match what you see in your Journey Workspaces app. This is because the features described are based on a default Journey Workspaces configuration, and your Workspaces app may be configured differently; for example, with your company's branding, with fields for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

## Overview

The Application Details screen 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 you click an application or task item on a List screen, and is refreshed for some actions or when you select a task. This screen is divided into two panes, with the left pane showing application information and the right pane showing information for 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.




1. Application pane
2. Progress stepper
3. Application key info card
4. Documents card
5. Task switcher
6. Notes
7. Application timeline
8. Task pane
9. Actions group
10. Task key info card
11. Task details tabs

## Features

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

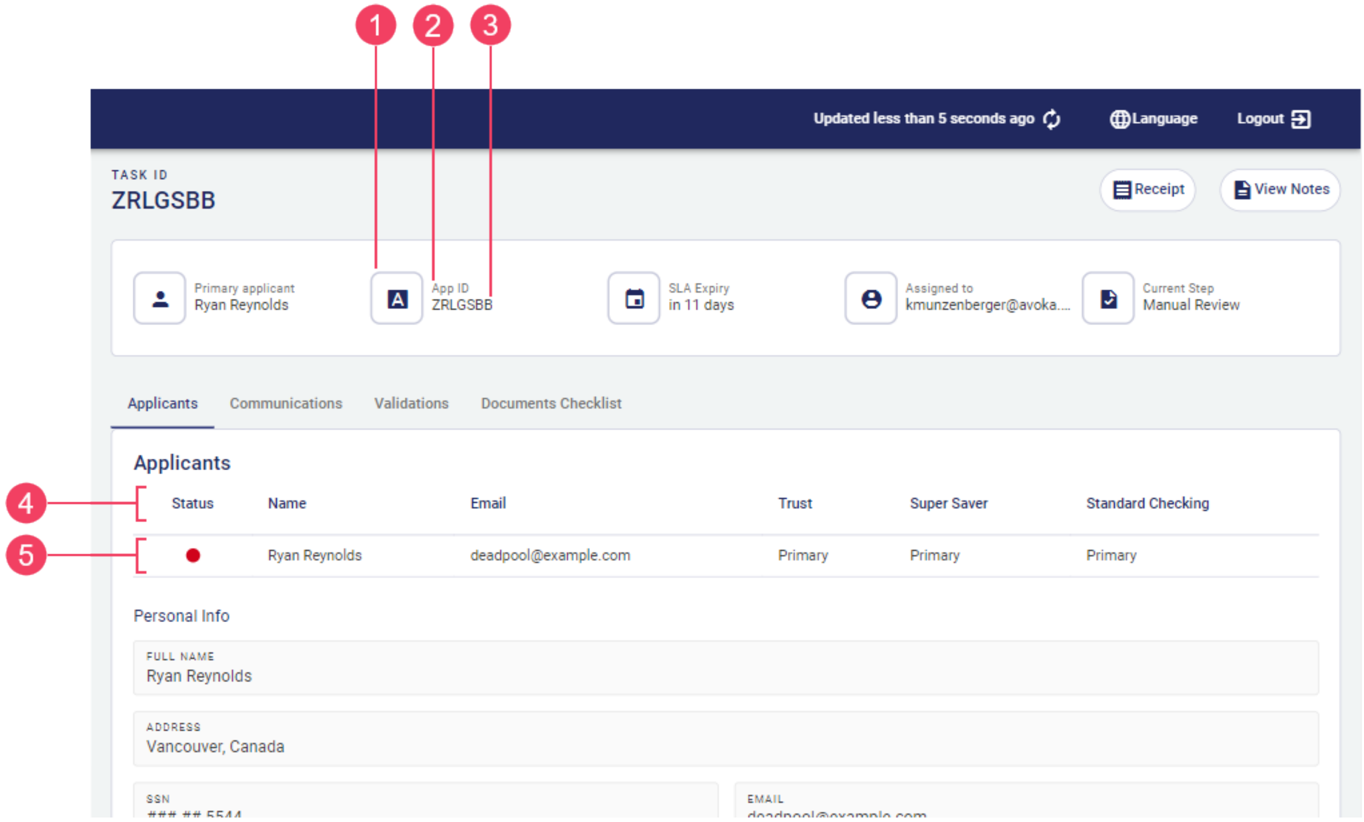
- Separate panes for application and task content.
- Separate key information cards for the application and the selected task.
- The ability to track application progress against an SLA.
- An optional progress stepper showing a high-level indication of the application's progress. By default, this is available for the Helpdesk and Assisted Channel spaces only.
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane.
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff.
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through.
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - 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.
- Other tabs for custom information relevant to the selected space that's not included in the standard cards, or that's presented differently.

NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

## 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.




1. Icon
2. Label
3. Value
4. Table labels
5. Table values

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.

## Application and Task panes

The Details screen is divided into two panes: an Application pane on the left, and a Task pane occupying the remainder of the screen.

The Application pane contains the following components:

- **Progress stepper:** a non-interactive high-level display of application progress
- **Application key info card:** a read-only view of key application-related information
- **Task switcher:** select which task is displayed in the Task pane
- **Notes:** consolidates all notes and their associated comments in a single card
- Documents card**:** manage the documents attached to an application
- **Application timeline:** a read-only display of the application's progress, showing details of the steps that are currently open and all the completed steps

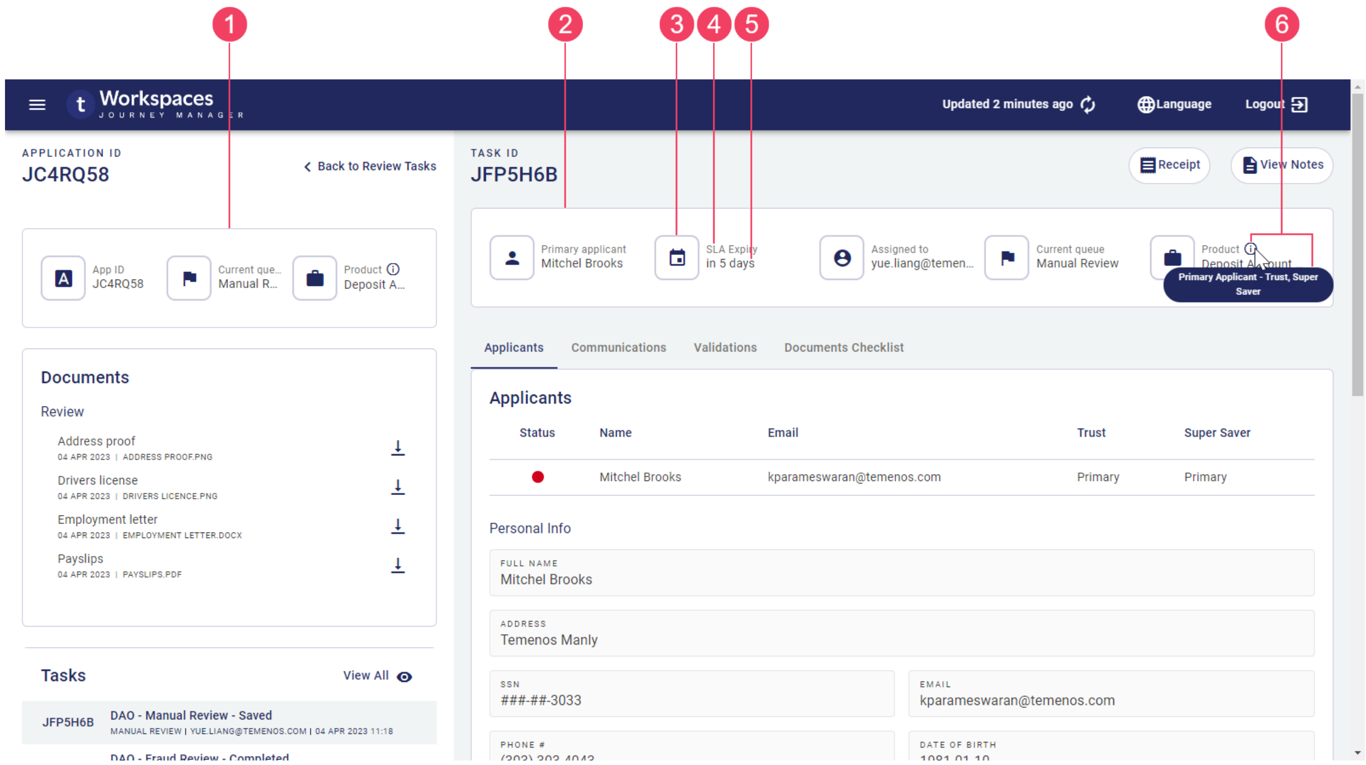
The Task pane contains the following components:

- **Task key info card:** a read-only view of key task-related information
- **Action group:** a group of action buttons, relevant to the selected task and dependent on the application's progress

- A set of task details tabs which are dependent on the current space but may include:
  - **Applicants**: applicant information including personal information and background checks
  - **Communications:** emails sent by Workspaces or Workspaces staff
  - **Validations:** view the details of background checks in various formats such as HTML or JSON
  - **Documents Checklist:** a list of required documents and whether they have been supplied
  - **Action Required:** a list of pending and completed actions

## Key Information

Key information cards display important application and task information that's handy for Workspaces users to have at their fingertips.




1. Application key info card
2. Task key info card
3. Icon
4. Label
5. Value
6. Additional info tooltip

Key information relating to an application and a selected task are displayed in separate key info cards. Each key info item has 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, such as a unique identifier, person, or duration. The number of key info items shown depends on the width of your browser window with up to three items displayed in the Application Application key info card and up to five items in the Task key info card.

Each key info item shows a single value but this can be limiting for some kinds of information. To improve this situation, additional information can be displayed in a tooltip. When available, a tooltip is indicated by a infoTooltip icon. To view the tooltip, point your mouse at the infoTooltip icon. 22.10This feature was introduced in the 22.10 release

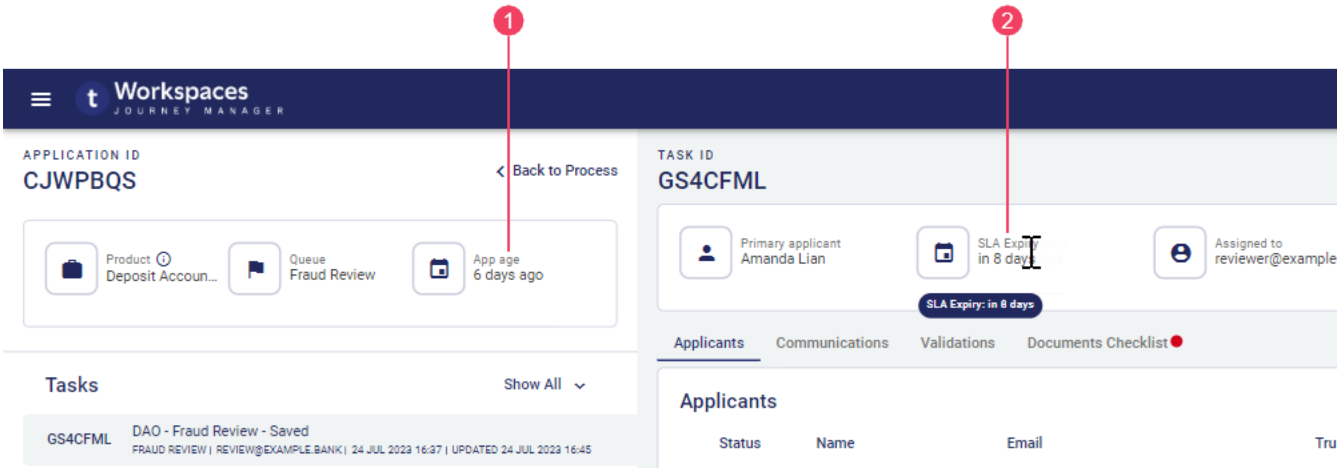
As an example, say you have an application type covering multiple optional products and you have a Product key info item. If an application includes multiple products, only the first product is displayed in the Product key info item. In this scenario, a tooltip could be configured to show all products included in the application.

INFO

If the value displayed in the Product key info item corresponds to a form group, the specific form associated with the task is displayed as the Product.

### SLA Expiry

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 either how much time remains to complete processing of the application or the elapsed time since the SLA was breached.




1. Application Age
2. SLA Expiry

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

NOTE

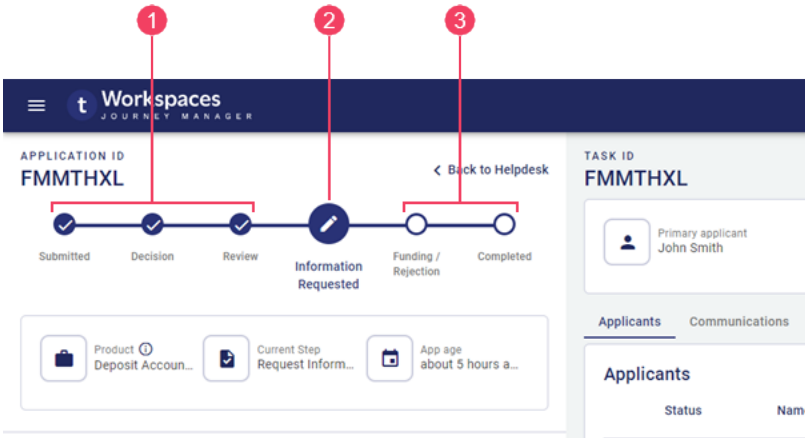
While the SLA Expiry field is available in the default configuration of Workspaces, it may not be available in your Workspaces portal or it may appear differently depending upon how your Workspaces portal has been configured.

## Progress stepper

The progress stepper is an optional component that presents a high-level overview of application progress against significant milestones in the application life cycle.  By default, the progress stepper is available for the Helpdesk and Assisted Channel spaces only. The progress stepper is hidden for saved applications, becoming visible once an application has been submitted.

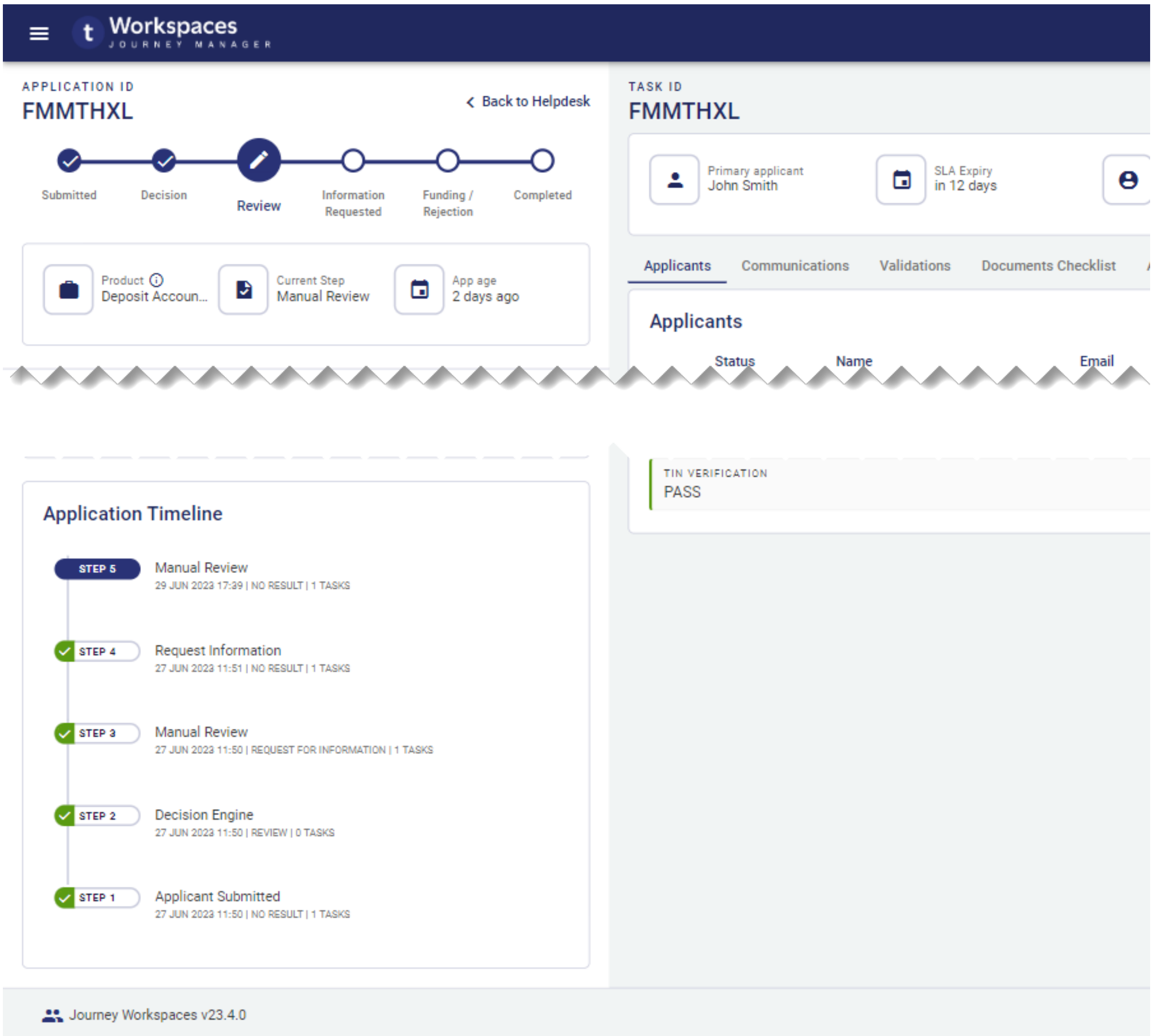
INFO

If you need to see more application processing details, the application timeline shows the exact steps performed.




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

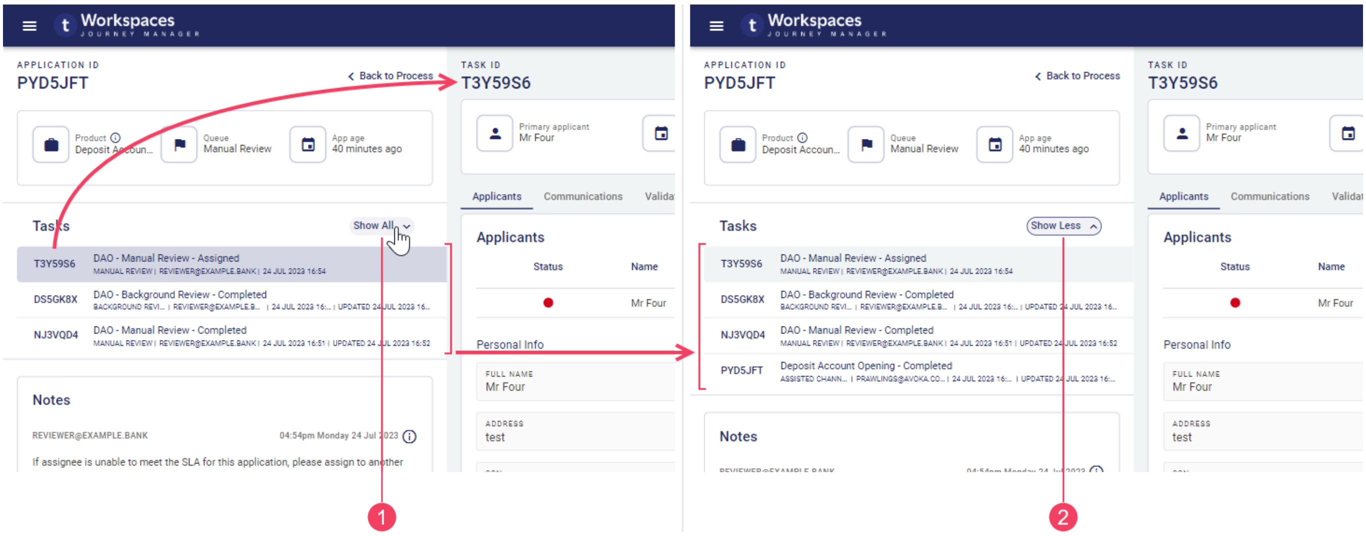
Current, completed and pending steps are differentiated visually, allowing the user to see the progress of submitted applications at a glance. Steps to the left of the current step are shown as completed even if they were skipped, while steps to the right of the current step are shown as pending even if they have been completed. For example, the following screenshot shows an application that is being reviewed for the second time after requested information has been provided. The progress stepper shows the Information Requested step as pending even though it has been completed because it is to the right of the current step, while the application timeline shows all steps the application has been through; in particular, the two Manual Review steps.




## Task switcher

As an application progresses through the application life cycle, tasks are created representing various steps that need to be completed. The task switcher displays the tasks associated with an application, and provides a way for you to select a task to focus on.

By default, a maximum of three tasks are displayed. If an application has more than three tasks, a Show All button is displayed. Click Show All to expand the task switcher so that all of the application's tasks are available. When expanded, the Show All button is replaced with a Show Less button. If required, you can click Show Less to reduce the height of the task switcher so that only three tasks are displayed.



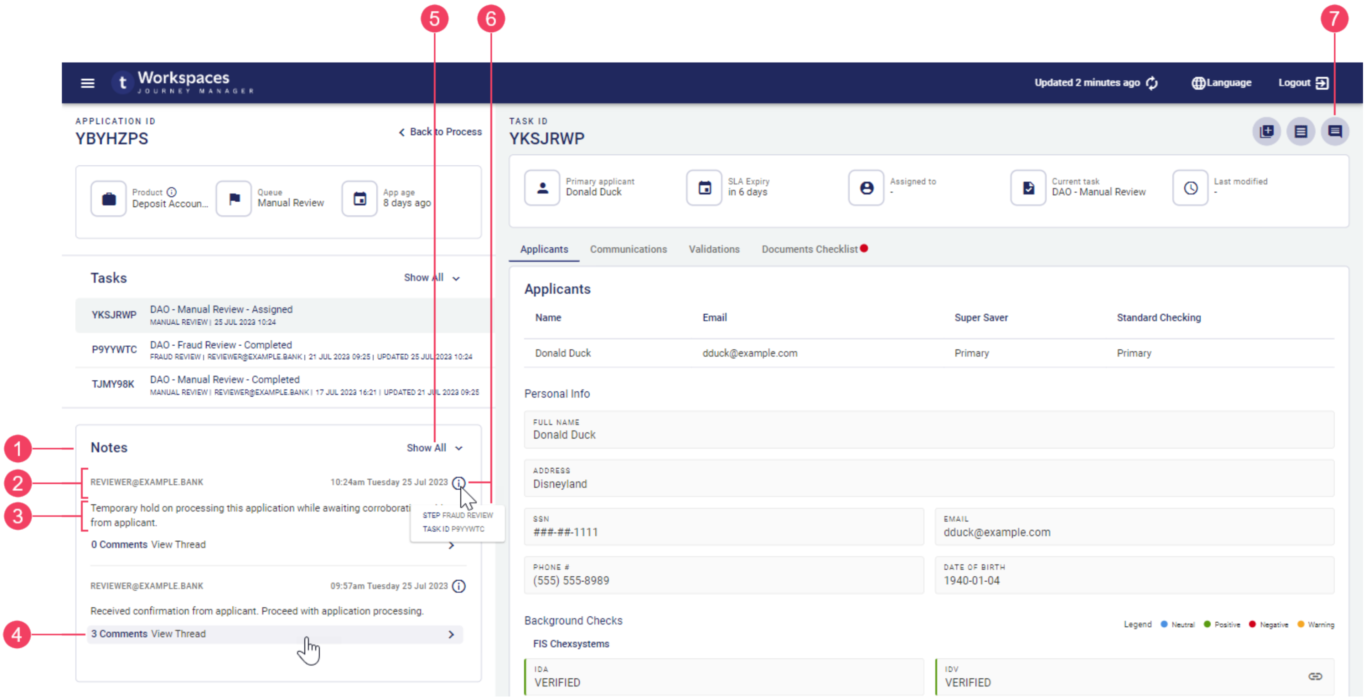

1. Show All
2. Show Less

Each task switcher item shows task data and metadata such as the task ID, the associated timeline step, and the task status. When you select a task switcher item, the selected item is highlighted in a way that connects it to the Task pane, and the Task pane is refreshed to show details relating to the selected task.

## Notes

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 such as how the application is processed, details of user inquiries, or changes in prioritization. An application can pass through many different sets of hands, so 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 notes against the relevant tasks. Notes can be added to any task at any time, even if the task is completed.

> INFO
>
> In Workspaces 22.04 and earlier releases, notes can be added to any task that is in progress, but not to completed tasks.




1. Notes card
2. Note details
3. Note text
4. Comments button
5. Show All button
6. Tooltip
7. Add Notes button

Notes are displayed in the reverse order in which they were made, with the latest note at the top. Each note identifies the user that added the note (email address) and when it was added (date and time) above the note's text. The related job step and task id can also be viewed in a tooltip.

By default, a maximum of two notes are shown. If there are more than two notes across all of the application's tasks, aShow All button appears. Select Show All to expand the Notes card and reveal all notes made against the application. When the Notes card is expanded, the Show All button is replaced by a Show Less button. Select Show Less to collapse the card back to its original size, showing just two notes.

You can comment on a note, thereby forming a thread starting with the note and followed by any comments made against it. The number of comments on a note is shown on the note's Comments button. These comments can be viewed and new comments added in the Thread modal window. Comments are displayed in the Thread modal in the reverse order in which they were made with the newest comments at the top. To view the Thread modal, click Comments.

TIP

To learn more about adding/viewing notes and comments, see Task notes and comments.

## Documents

The processing of applications often requires that the information entered by applicants is 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 send the document to the person processing the application who then uploads and attaches it to the application.

INFO

Workspaces allows duplicate files to be attached to an application. Two files are considered 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.

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.

- **link**View detail**:** Available for supported document types only. On the right-hand side of each document item is an icon that you can click to view the document in a modal window. Supported document types are: JSON, XML, HTML, PDF, and some image formats (JPEG/JPG, PNG, GIF). 23.10This feature was introduced in the 23.10 release
- **vertical_align_bottom**Download**:** Available only if linkView detail is not available. On the right-hand side of each document item is an icon that you can click to download the document file.


1. Document title
2. Uploaded timestamp
3. File details
4. Upload button
5. View detail icon
6. Download icon

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 option lets you attach documents to an application. Here are some guidelines about when you can and can't upload documents:

- You can upload a document in any space.
- You can upload documents from a Details screen, but not from a List screen.
- You can't upload documents for completed tasks, only for tasks that are still in progress.

- You can only upload documents for tasks that are assigned to you. However, this constraint may be relaxed in your Workspaces configuration, allowing anyone to upload a document to any task, regardless of who it is assigned to.

In addition to the guidelines above, Workspaces can be configured with conditional rules, based on task or application data values, that control whether the document upload option is available at all.

To upload a document on the Details screen:

1. In the Documents card, click vertical_align_topUpload. The Add / Remove Documents modal window is displayed.
2. Enter a document description. The Upload File button becomes enabled.
3. Click Upload File and browse for the document file you want to upload, then select it and close the file browser dialog. A progress bar is displayed while the file is uploaded.

   > INFO
   >
   > 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 another document and repeat from step 2 above.
5. Click Done or closeClose when you're finished uploading documents. The uploaded document is added to the Documents card.

### Manage uploaded documents

Workspaces provides several options that allow you to manage the documents attached to an application. These options are available on the Add / Remove Documents modal window which you can display by clicking vertical_align_topUpload on the Details screen.

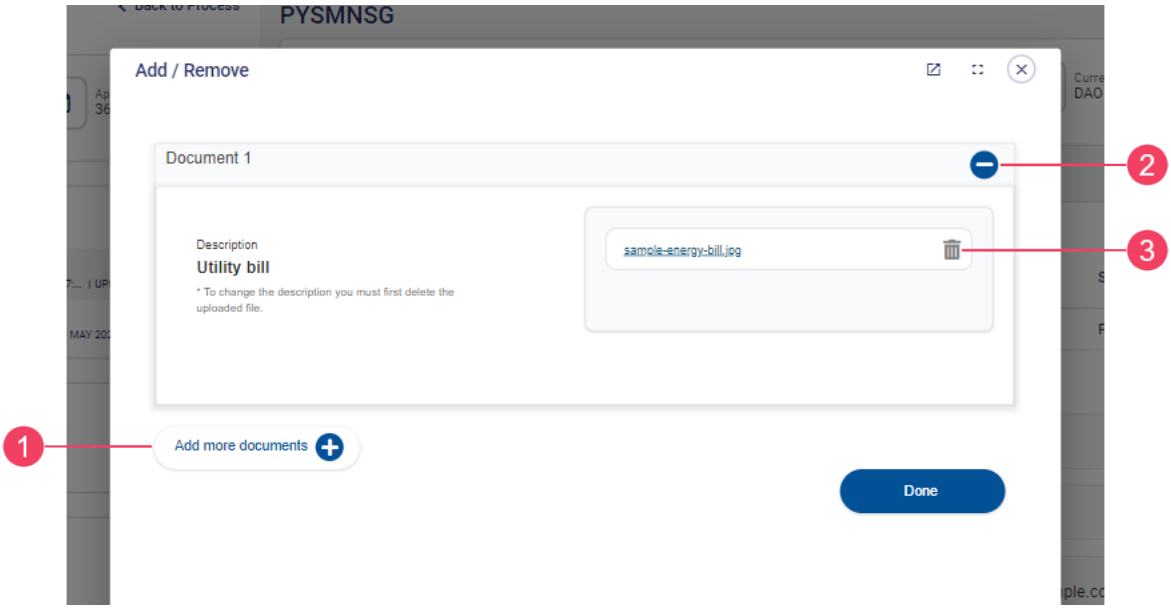
- **Upload multiple documents:** Follow the steps above describing how to upload a document, and at step 4 follow the instructions to upload more documents.
- **Upload a different file for an existing document:** With the Add / Remove Documents modal window open, locate the document you want to modify. Click do_not_disturb_onRemove File for 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 Add / Remove Documents modal window open, locate the document you want to remove and click deleteRemove Document for this document.

INFO

You can't remove or change documents that were uploaded to the application at the time it was submitted.

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




1. Add another document button
2. Remove Document button
3. Remove File button

### Example: Upload a document

This example shows how someone who is processing applications can upload an identity document, in this case a driver 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, by default, you can only upload documents for tasks that are assigned to you.

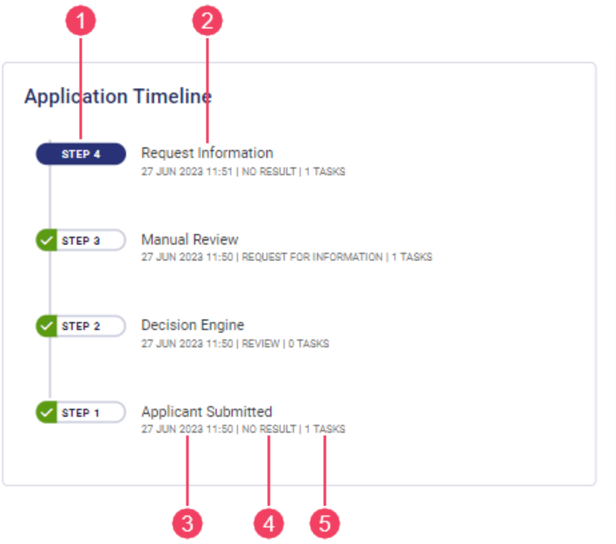
1. Login to Workspaces and select the Review space.
2. Locate a task assigned to you, or find and claim an unassigned task, then select the task to display the task's details.
3. On the Details screen, go to the Documents card, then click vertical_align_topUpload (A) to open the Add / Remove Documents modal window (B).
4. Enter a description (C) for the document that you want to upload. Note that the uploadUpload File button on the right is disabled until you enter a value in the description field.
5. Click uploadUpload File (D), then browse to and select the document file you want to upload (E). A progress bar is displayed while the file is uploaded (F).
6. Click Done (G). The Add / Remove Documents modal window closes, returning to the Details screen, and the uploaded document appears in the Documents card. (H)

## Application timeline

NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

The application timeline presents a simplified read-only display of application progress. Steps are shown in reverse chronological order, with the current step at the top and completed steps shown below it. The application timeline shows the exact steps performed during application processing unlike the progress stepper which provides only a high-level abstract overview of application progress.




1. Step
2. Step queue
3. Last updated timestamp
4. Step result
5. Tasks in step

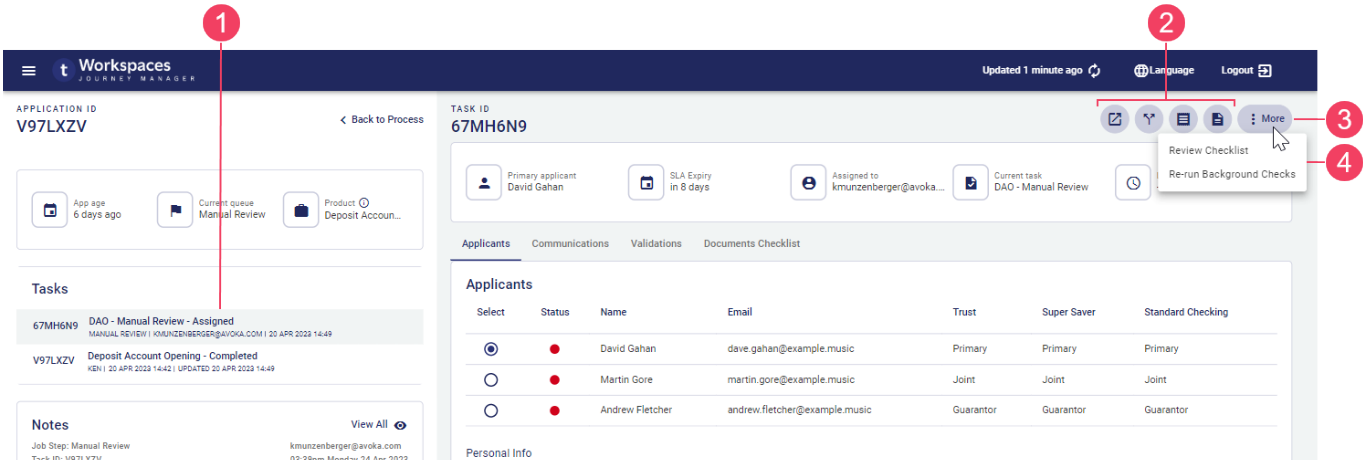
Each step in the application timeline is represented by a separate timeline item which is generally associated with one or more tasks, although a step that is processed automatically by the system may not have any tasks. Each timeline item shows summary information relating to the step including the following details:

- The name of the queue that the step sources tasks from.
- The date/time that the task was most recently updated.
- The step's result, or `NO RESULT` if it is not yet determined.
- The number of tasks in the step.

> INFO
>
> The task associated with the current step may not be displayed in the Task pane. This is because the task switcher controls which task is displayed, not the application timeline.

## 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.




1. Selected task
2. Standard action buttons
3. button
4. More menu (custom actions)

NOTE

The button labels and tooltips for the standard action types are configurable, so they may be different in your Journey Workspaces portal to what is shown in this documentation.

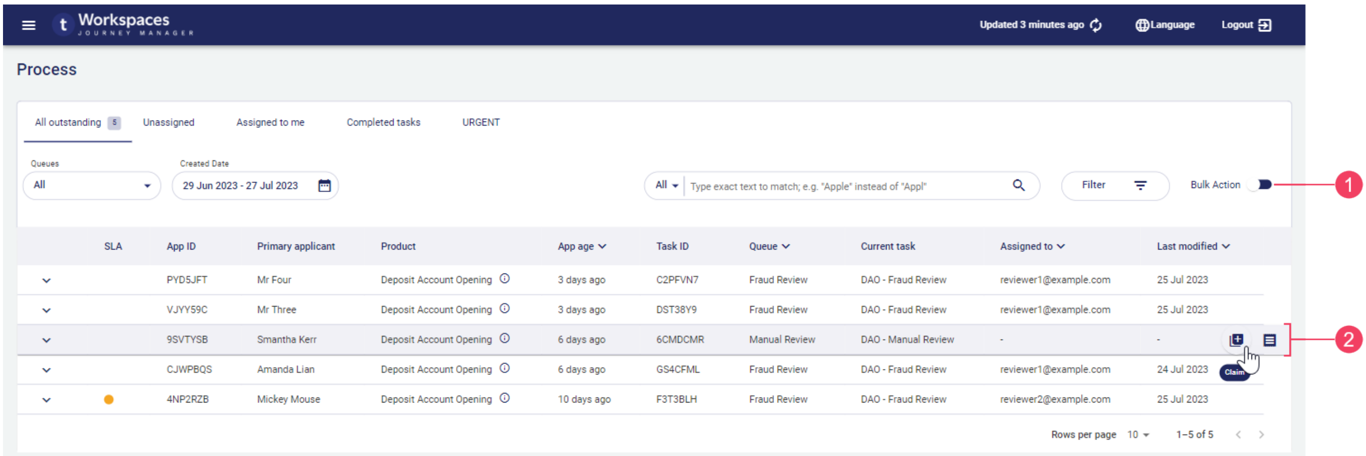
## Standard actions

Standard actions can be performed from any Details screen. Actions are accessed via the buttons in the actions group located in the top-right of the Task pane.

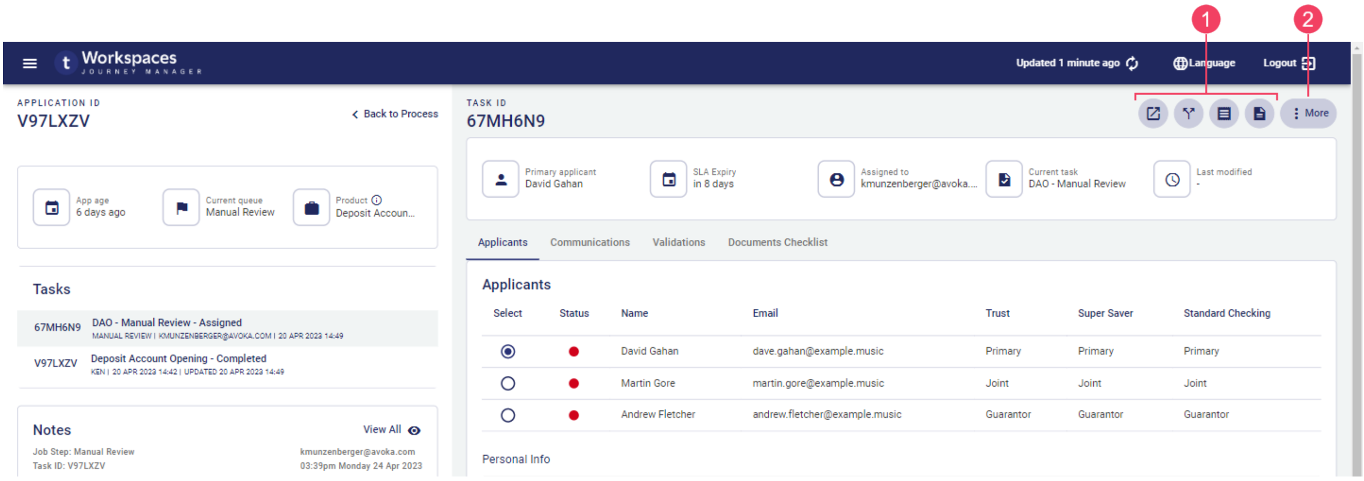
INFO

In Workspaces 23.04, task actions are consolidated with application actions in the actions group. In earlier releases, task actions were accessed via icon buttons on each task in the application timeline.

- [List screen]
- [Details screen]



1. Bulk action
2. Standard action buttons



1. Standard action buttons
2. Custom action button

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 no actions are available, this is indicated by displaying the infoNone icon instead of the action buttons.

In the default configuration, the following standard actions are available for all releases and in all spaces except as noted.

- Receipt
- Share (Review, Helpdesk, Assisted Channel, Manage spaces) 23.10This feature was introduced in the 23.10 release

- Add Notes (All spaces except Document Requests) 23.04This feature was introduced in the 23.04 release
- View Notes 23.04This feature was removed in the 23.04 release

Also, the Notes card > Comments core function is always available even when the Add Notes action is not. 23.04This feature was introduced in the 23.04 release

To perform a standard action, click the action button corresponding to the desired action. Most standard actions will display a brief message in the bottom-left corner of the screen confirming that the 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.

> INFO
>
> 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 then select the desired action from the More menu. 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.

## 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.

---

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

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

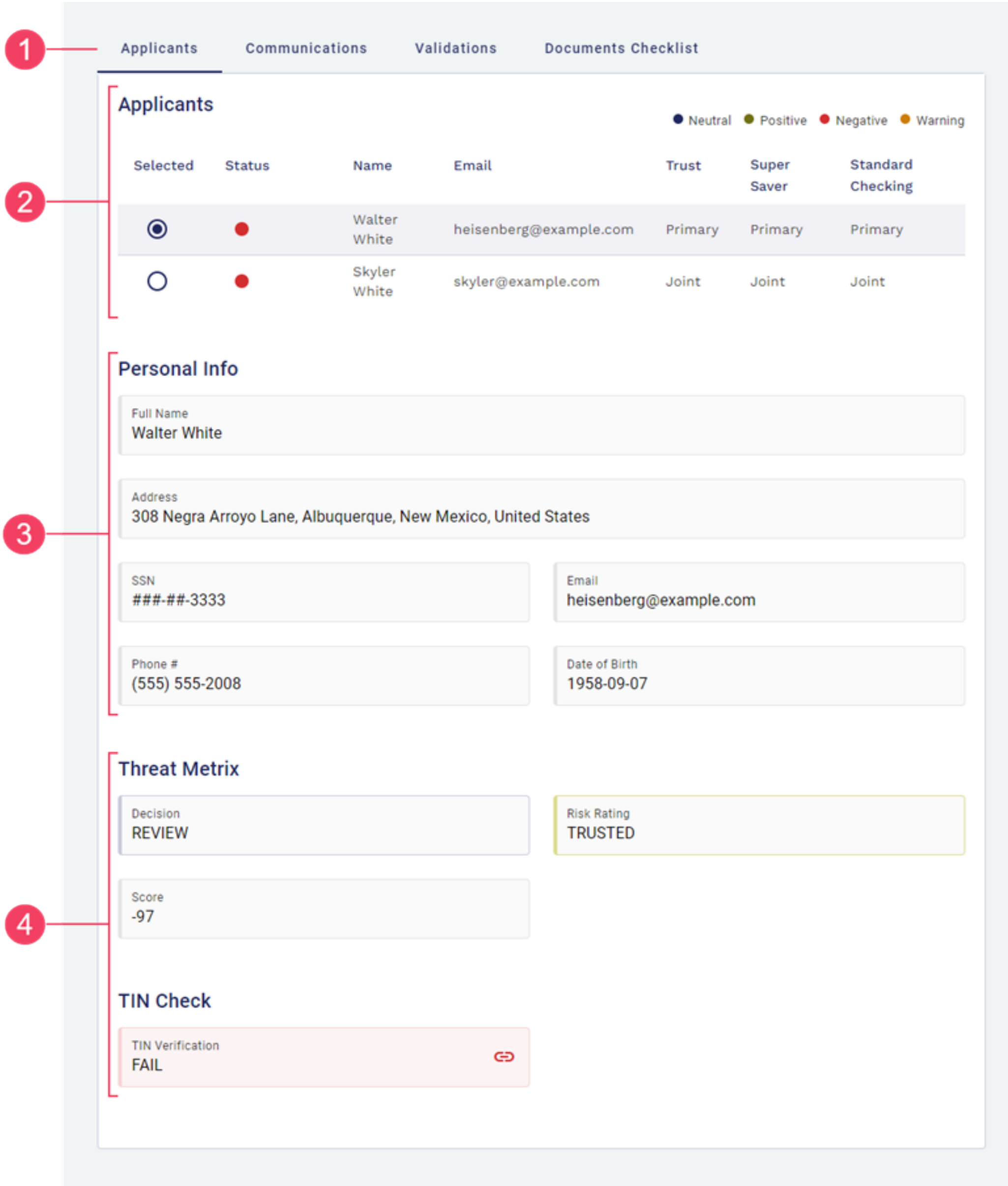
> INFO
>
> Applicant information may be displayed differently in earlier releases (prior to 23.04). For more information, see The Application Details Screen (22.10 and earlier).

Applicant information is grouped together under the Applicants tab. 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.

[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.



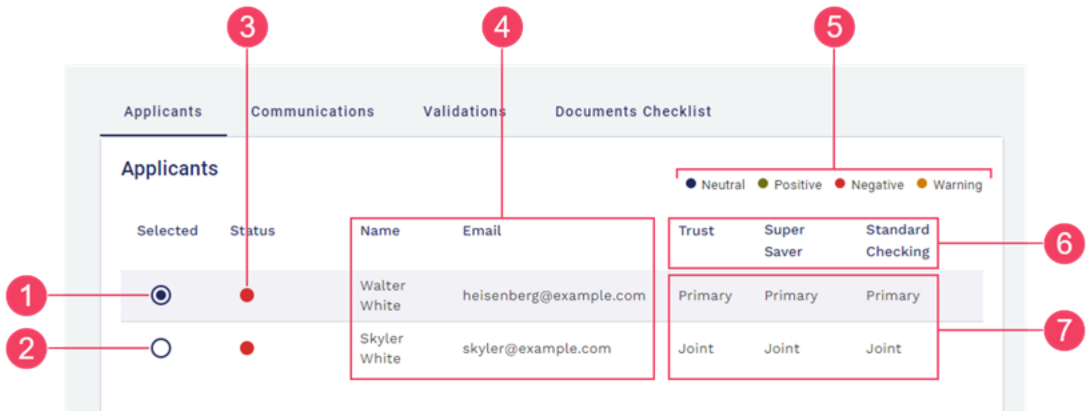

1. Applicants tab
2. Applicants section
3. Personal Info section
4. Background checks sections

## 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.




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

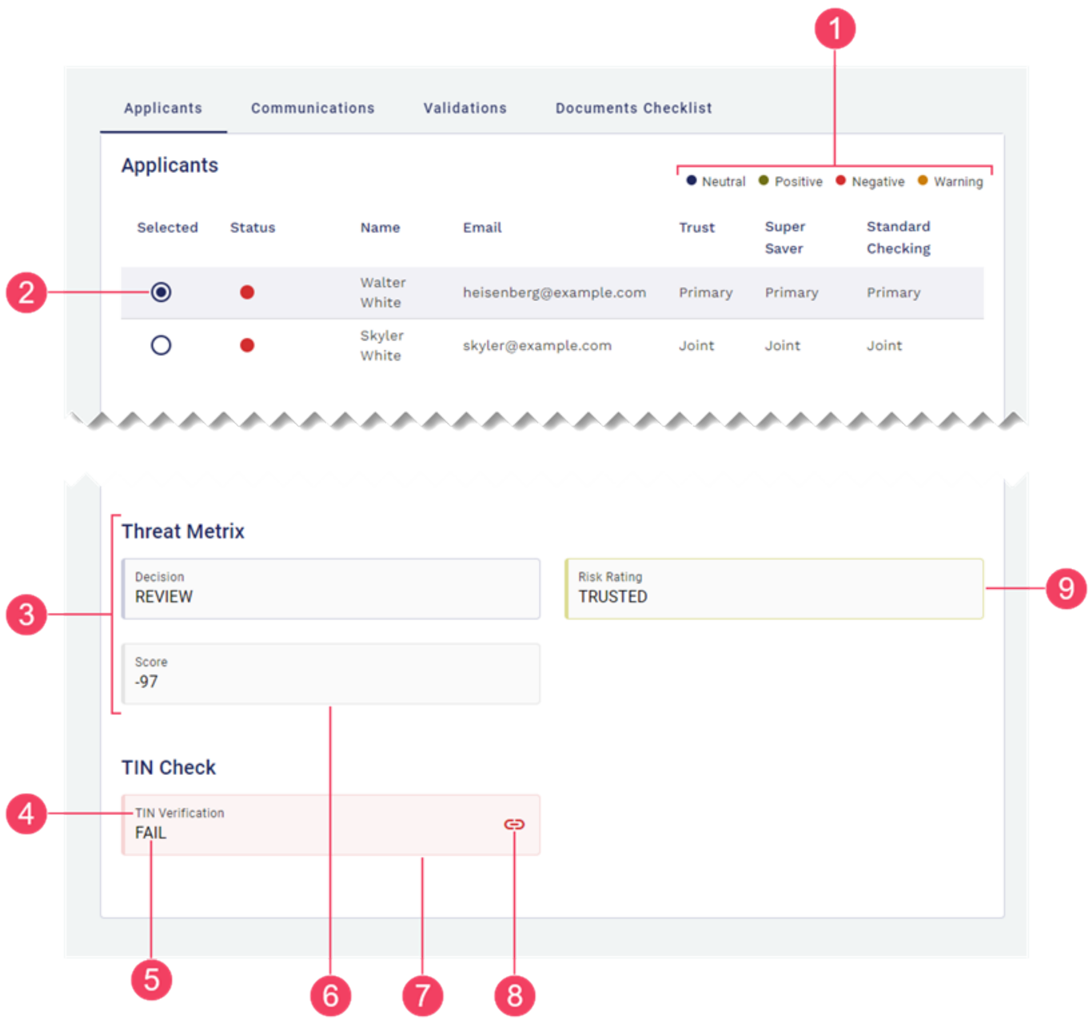
Immediately beneath the Applicant (Selected Applicant) section is the Personal Info section. As the name suggests, this section displays personal information (PII[1]) relating to the currently selected applicant. In Workspaces 19.11 and later releases, personal information is displayed in a grid layout 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 section

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.

---

[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.

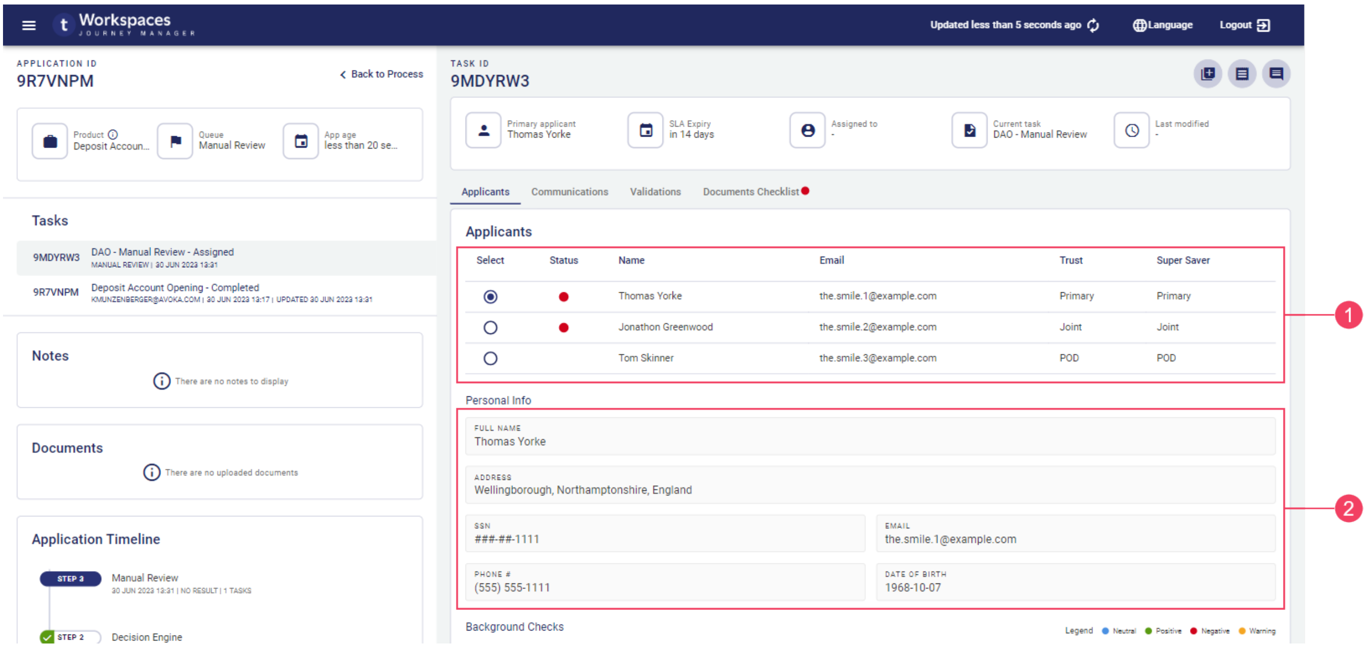
Some background checks have additional information associated with them which can be useful to understand how the result was determined. The availability of additional information is indicated by a linkDetail Link icon to the right of the result; click the link to view the additional information in a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

## Custom content

Much of the Workspaces user interface presents various types of content (information and features) in components or layouts specifically designed for each content type. In addition to the standard content types described above, your Journey Workspaces portal may also be configured with additional custom content specific to your organization. While custom content is more commonly available on the Details screen in separate tabs 22.10This feature was introduced in the 22.10 release, you may also find it used on the List screen in expansion rows.

Workspaces supports two format options for custom content, designed for two different kinds of data:

- **Multi-value data:** Content is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different kind of content, identified by the column header, while each row relates to a single entity such as an applicant, a background check, or a document. Each individual data item is either a simple text/number display or an icon button that links to additional details or functionality. All data items in the same column are of the same type.
- **Single-value data:** Each data item in a container (such as a tab, card or section) is displayed separately, with a label and value, and an optional icon button that links to additional details or functionality.




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

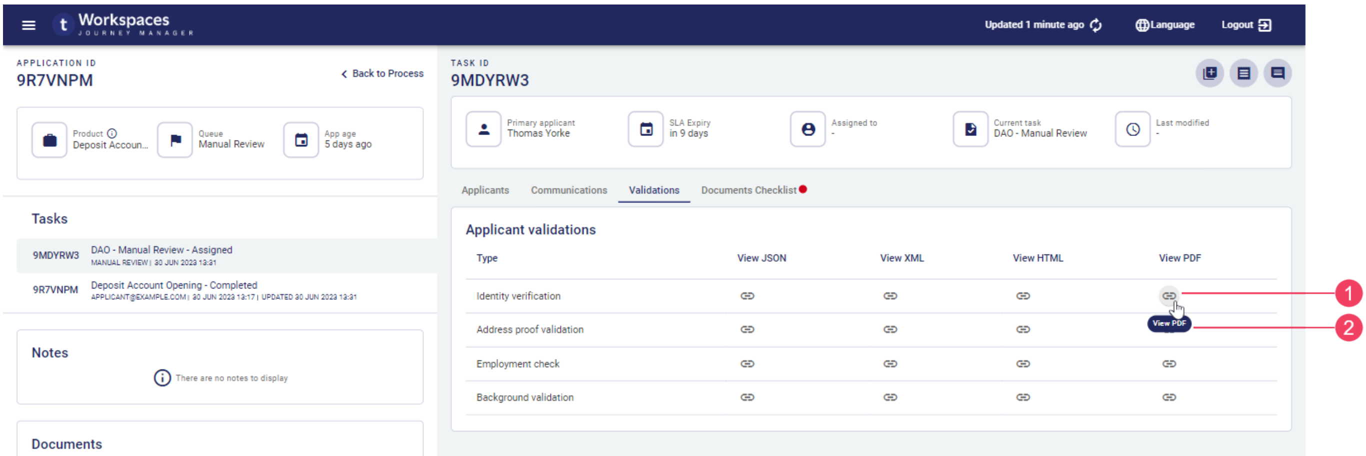
INFO

Custom content 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.

Several icon types are supported for icon buttons in custom content:

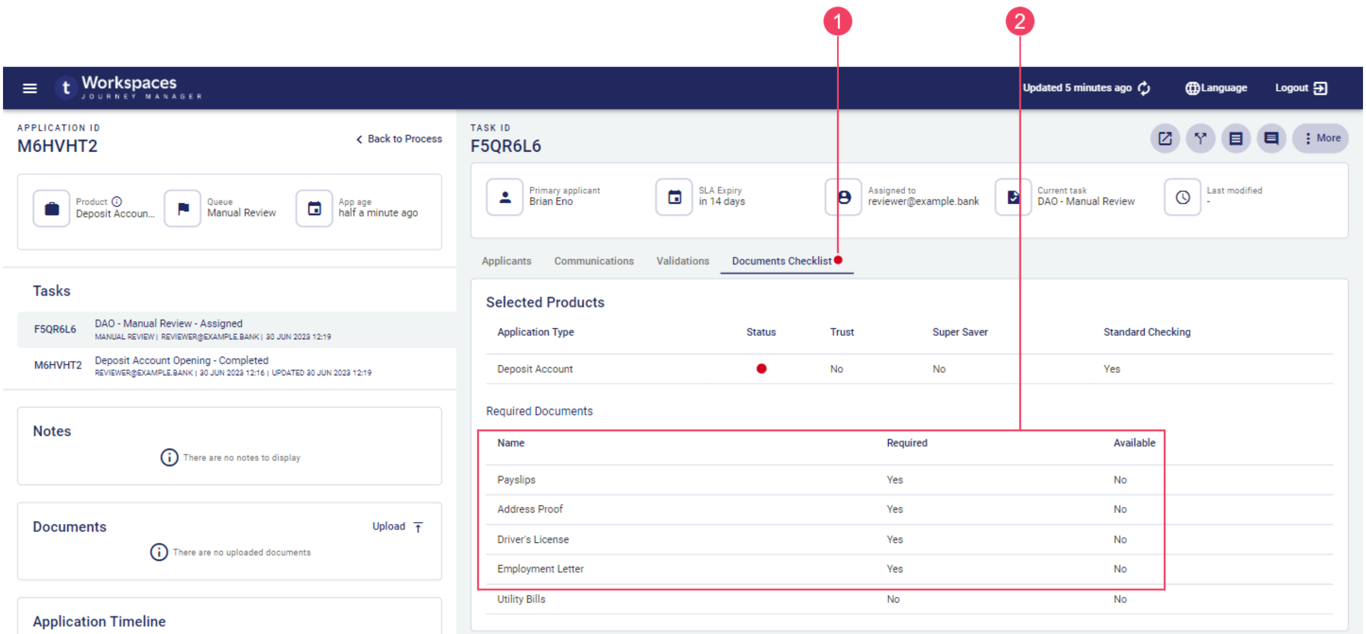
- **link**Detail Link**:** Indicates additional details are available to view. Click the icon button to display the additional details in a pop-up window.
- **vertical_align_bottom**Download**:** Indicates the additional details are available to download. Click the icon button to download the file containing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

An icon button is usually accompanied by a tooltip as part of the accessible user interface available to all users. This helps to explain an icon button's purpose, in case the icon is not recognized immediately.



1. Icon button
2. Accessible tooltip

As mentioned above, custom information is displayed in separate tabs. This allows grouping of content representing related information that can be acted on as required. A tab containing content that requires attention is indicated by an ● action badge. To clear an action badge, select the tab that the badge appears on and perform the action indicated or implied. For example, the following image shows an action badge on the Documents Checklist tab. Selecting this tab reveals that several of the items (documents) in the Required Documents section are required but not yet available. The implication here is that the unavailable documents need to be uploaded (by the applicant) in order to clear the action badge from this tab.

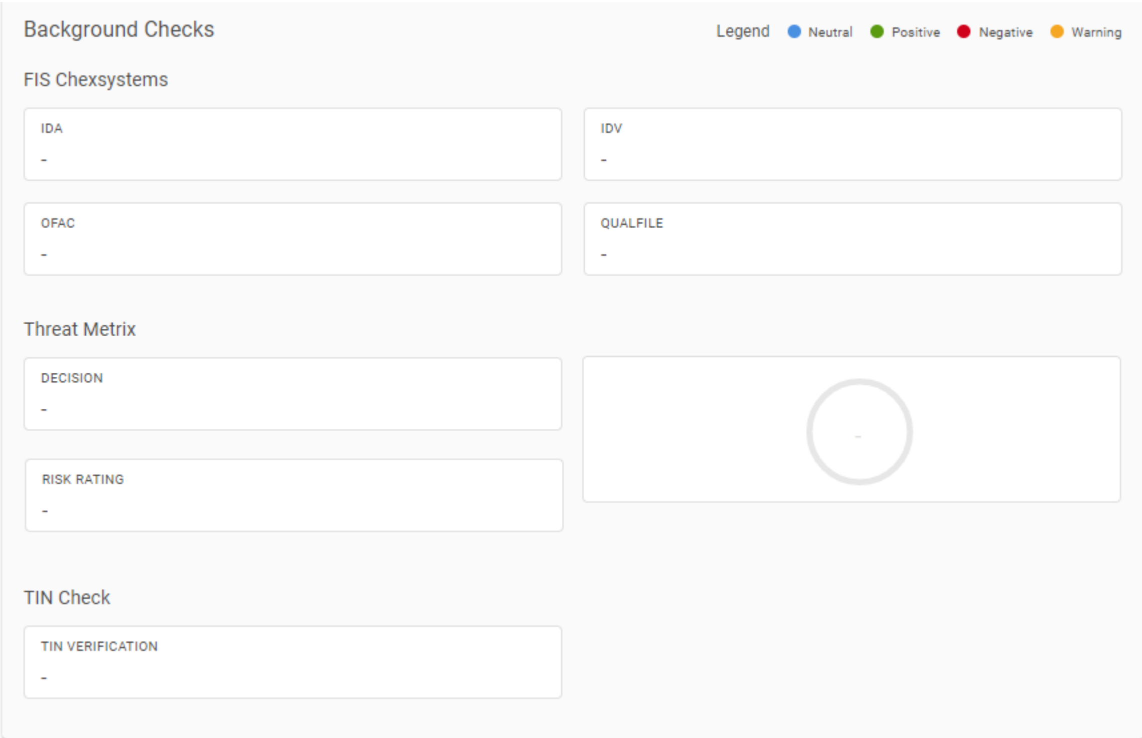


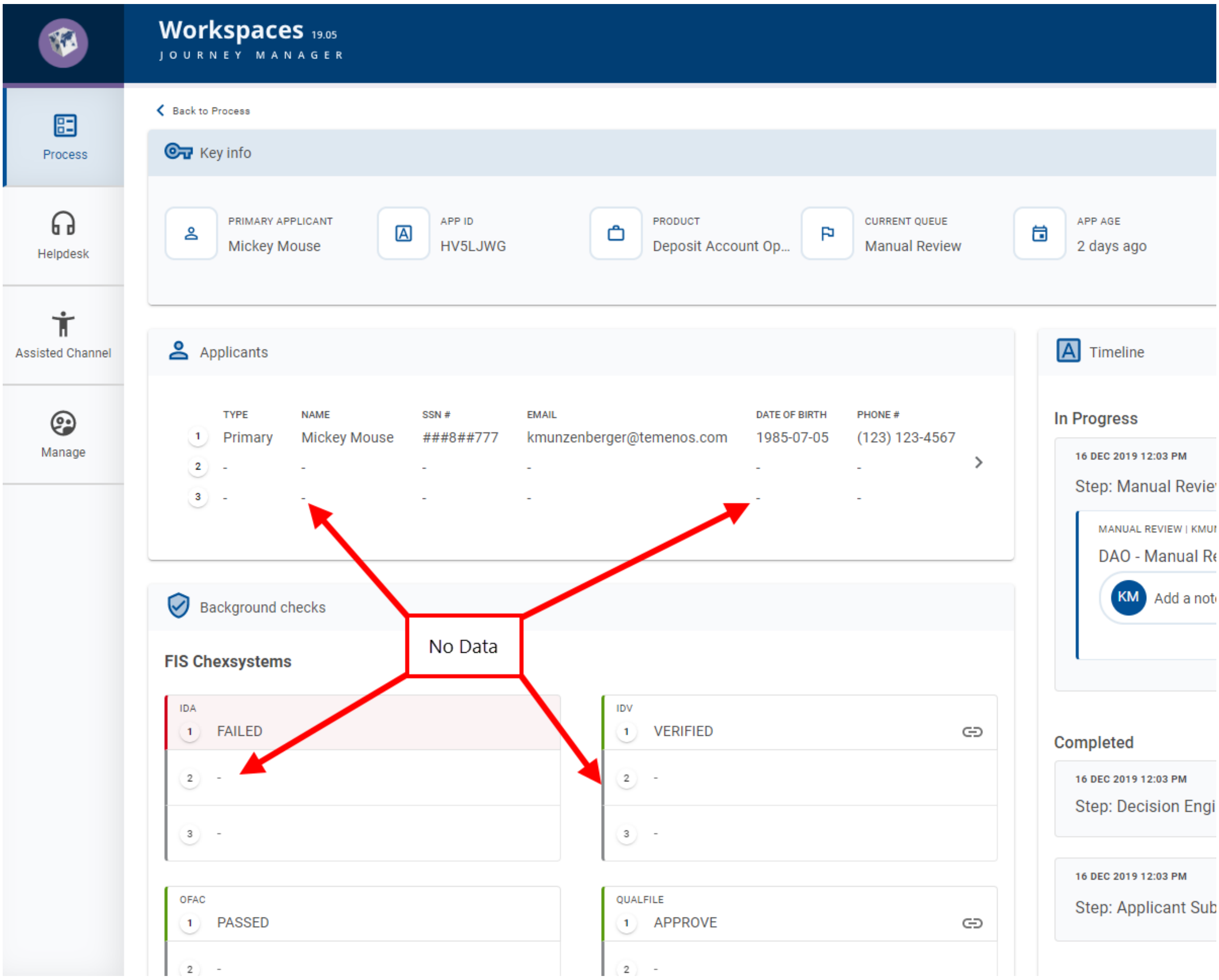
1. Action badge
2. Content requiring attention

## 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.

# The Application Details Screen (22.10 and earlier)

NOTE

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

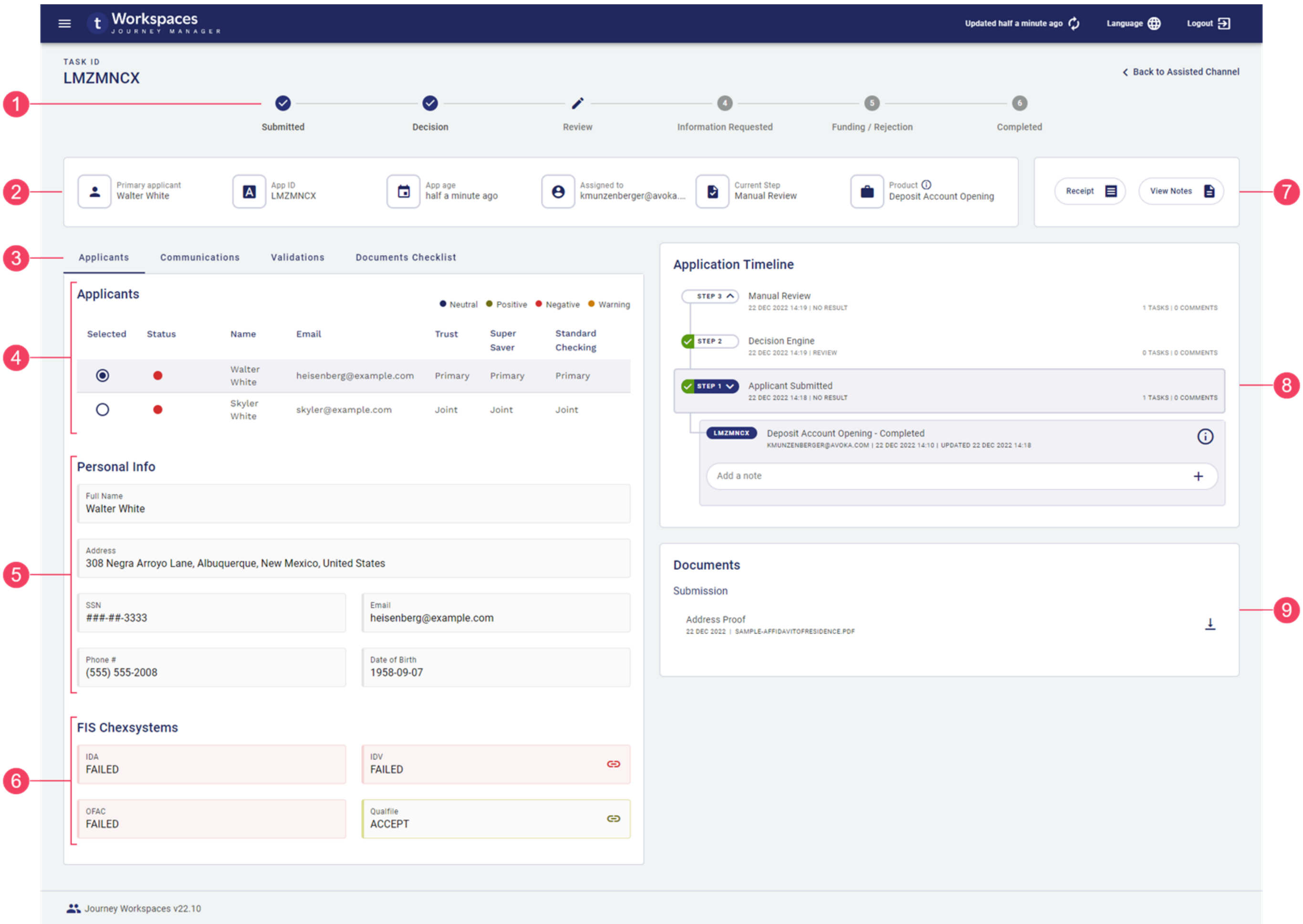
## Overview

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.

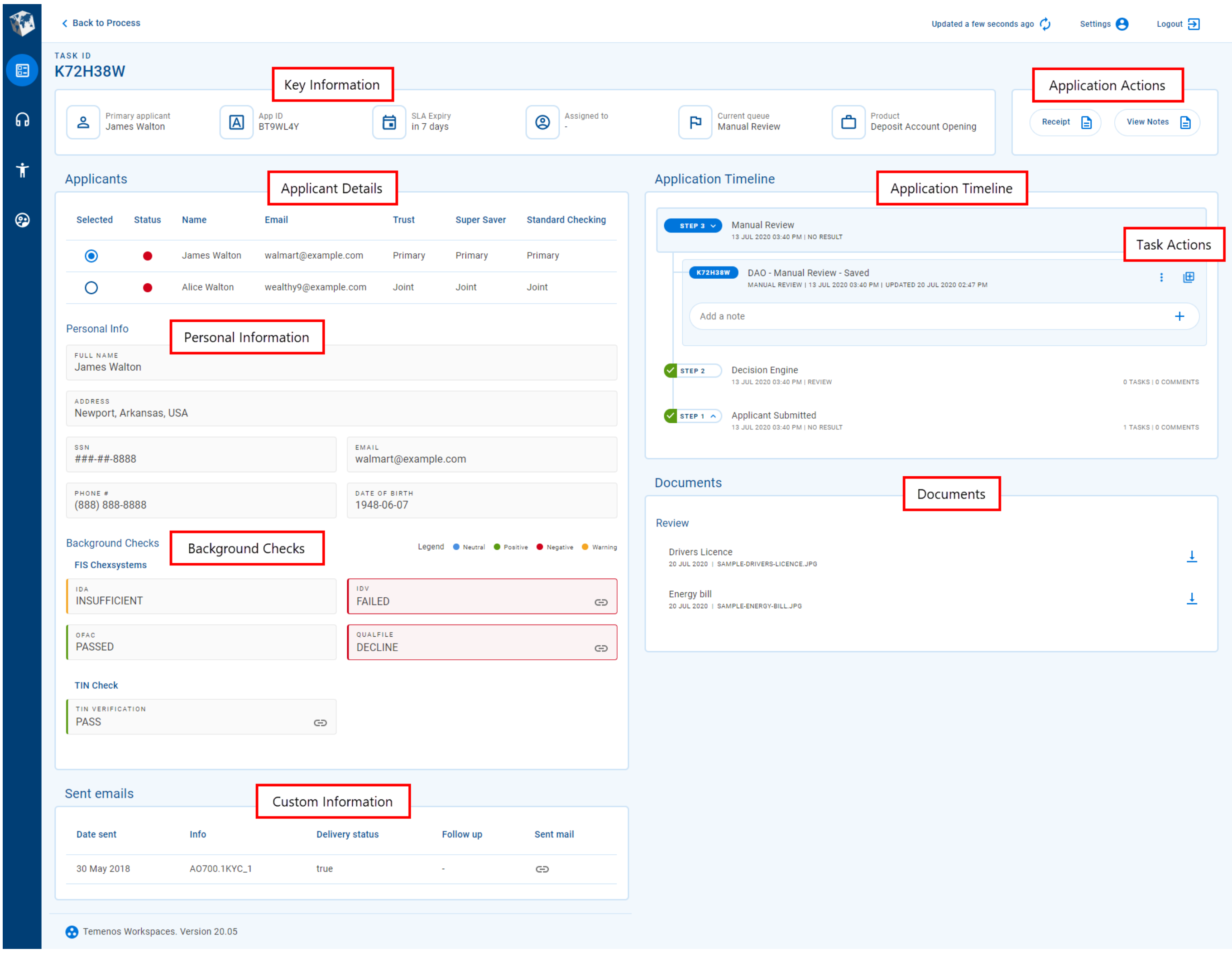
The Details screen is displayed when a user clicks an application or task in an item list on a List screen, and the information displayed is reloaded when the use clicks a task in the application timeline. Application information is displayed in the context of a specific task, being either the first 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.

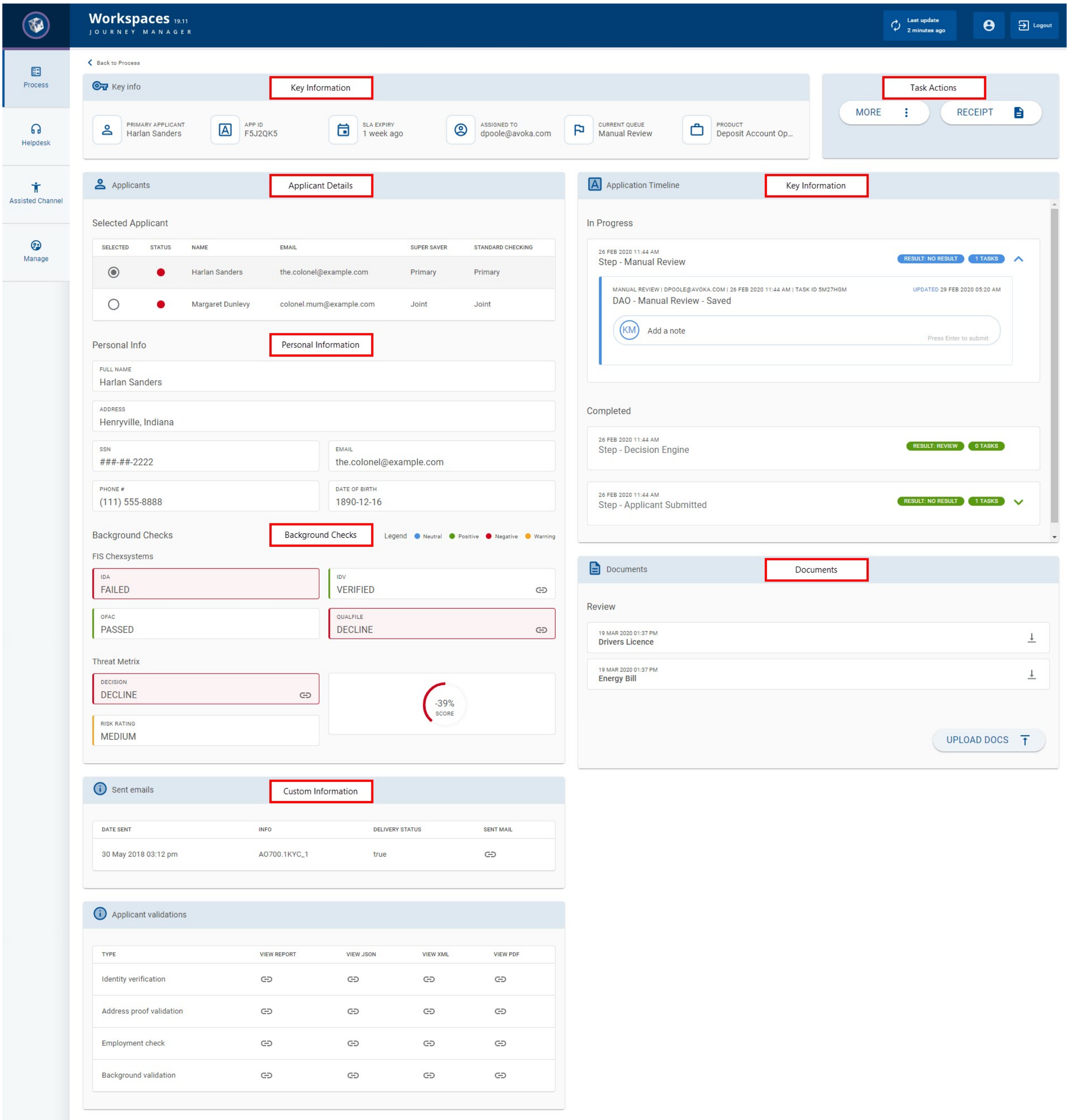
- 22.10
- 20.05 - 22.04
- Prior to 20.05



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



Back to Process
Updated a few seconds ago
Settings
Logout
TASK ID
K72H38W
Key Information
Application Actions
Primary applicant
James Walton
App ID
BT9WL4Y
SLA Expiry
in 7 days
Assigned to
Current queue
Manual Review
Product
Deposit Account Opening
Receipt
View Notes
Applicants
Applicant Details
Selected
Status
Name
Email
Trust
Super Saver
Standard Checking
James Walton
walmart@example.com
Primary
Alice Walton
wealthy9@example.com
Joint
Personal Info
Personal Information
FULL NAME
James Walton
ADDRESS
Newport, Arkansas, USA
SSN
###-##-8888
EMAIL
walmart@example.com
PHONE #
(888) 888-8888
DATE OF BIRTH
1948-06-07
Background Checks
Background Checks
FIS Chexsystems
Legend
Neutral
Positive
Negative
Warning
IDA
INSUFFICIENT
IDV
FAILED
OFAC
PASSED
QUALFILE
DECLINE
TIN Check
TIN VERIFICATION
PASS
Sent emails
Custom Information
Date sent
Info
Delivery status
Follow up
Sent mail
30 May 2018
AO700.1KYC_1
true
Application Timeline
Application Timeline
Task Actions
STEP 3
Manual Review
K72H38W
DAO - Manual Review - Saved
Add a note
STEP 2
Decision Engine
STEP 1
Applicant Submitted
Documents
Documents
Review
Drivers Licence
Energy bill
Temenos Workspaces. Version 20.05




## 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 set of tabs providing access to applicant data and other custom information. 22.10This feature was introduced in the 22.10 release

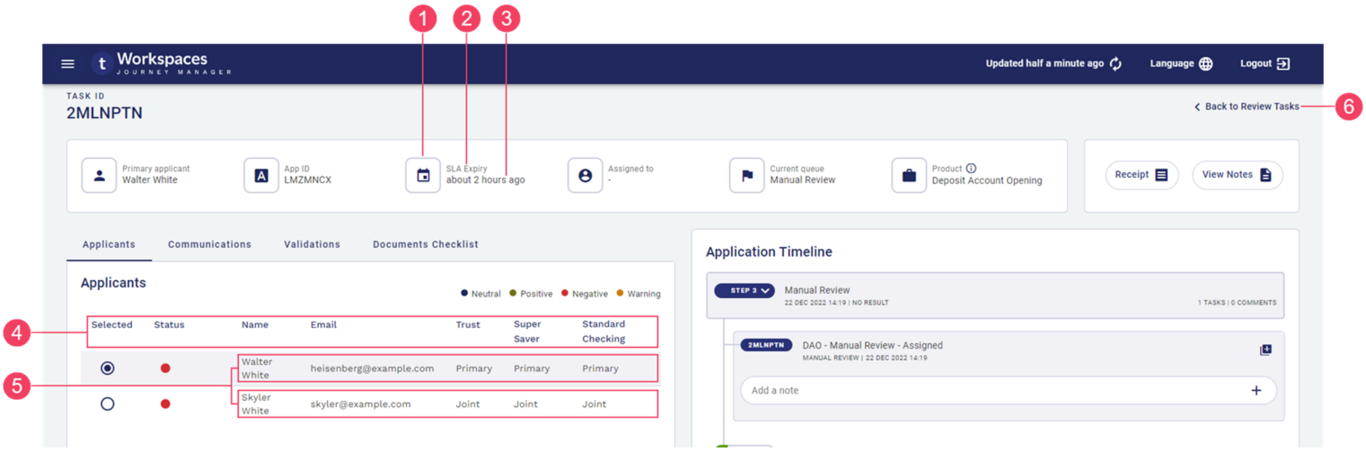
  The applicant data, shown on the Applicants tab, includes:
  - A list of applicants and products from which you can select an applicant to view more details. 19.11This feature was introduced in the 19.11 release
  - Personal information for the selected applicant, including identity and contact details.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

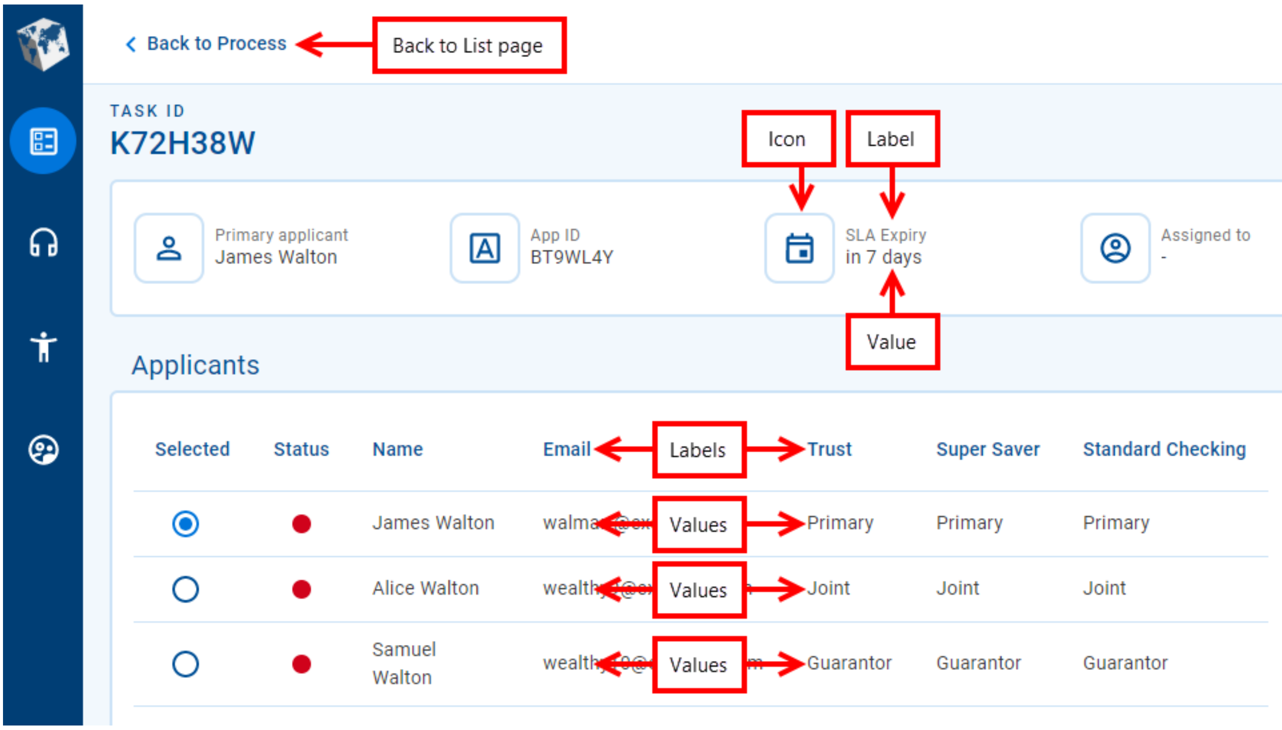
## Data items

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.

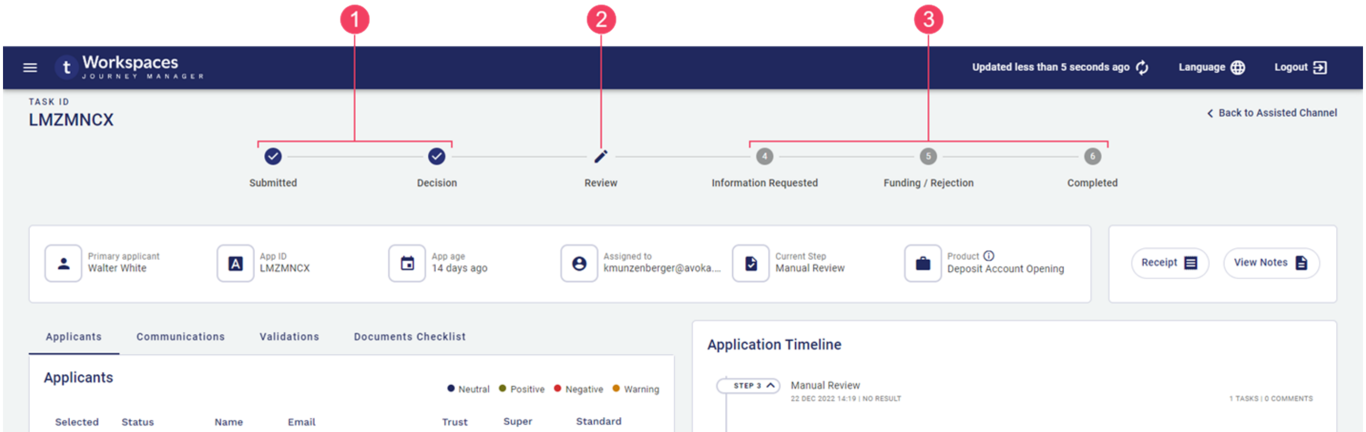
By default, values in table columns wrap when they are wider than the column. However, sometimes this behavior is undesirable, and it can be overridden for specific columns via configuration.

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

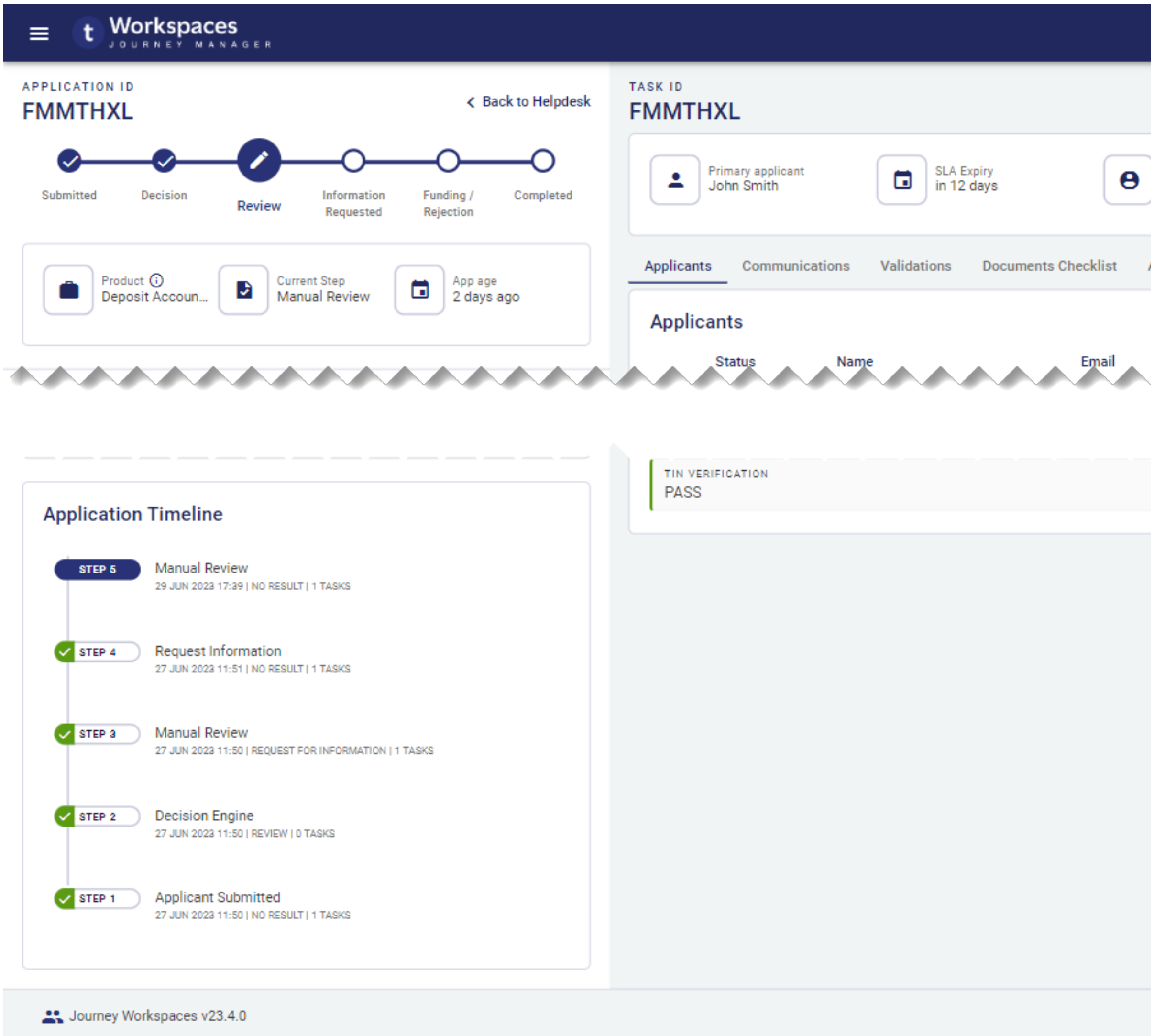
The progress stepper is an optional component that presents a high-level overview of application progress against significant milestones in the application life cycle. By default, the progress stepper is available for the Helpdesk and Assisted Channel spaces only. The progress stepper is hidden for saved applications, becoming visible once an application has been submitted.

> INFO
>
> If you need to see more application processing details, the application timeline shows the exact steps performed.




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

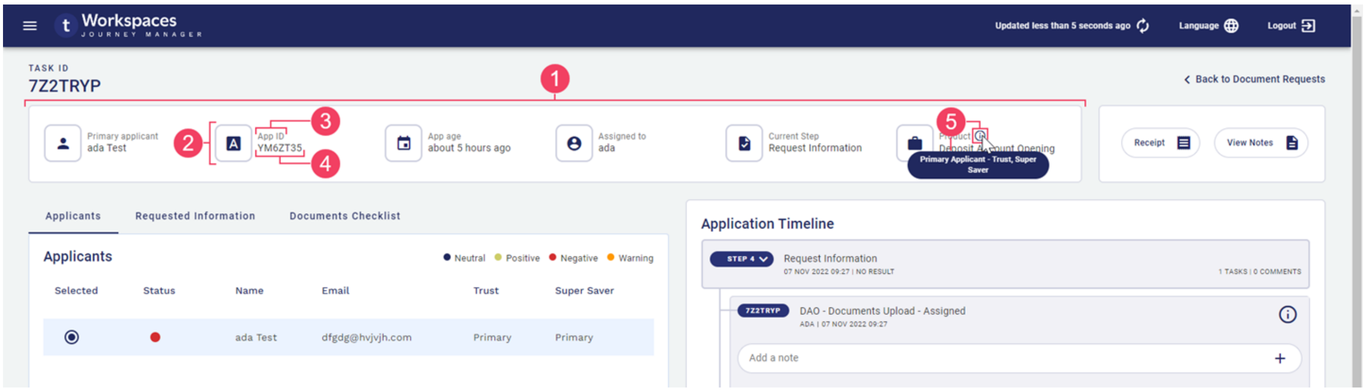
Current, completed and pending steps are differentiated visually, allowing the user to see the progress of submitted applications at a glance. Steps to the left of the current step are shown as completed even if they were skipped, while steps to the right of the current step are shown as pending even if they have been completed. For example, the following screenshot shows an application that is being reviewed for the second time after requested information has been provided. The progress stepper shows the Information Requested step as pending even though it has been completed because it is to the right of the current step, while the application timeline shows all steps the application has been through; in particular, the two Manual Review steps.



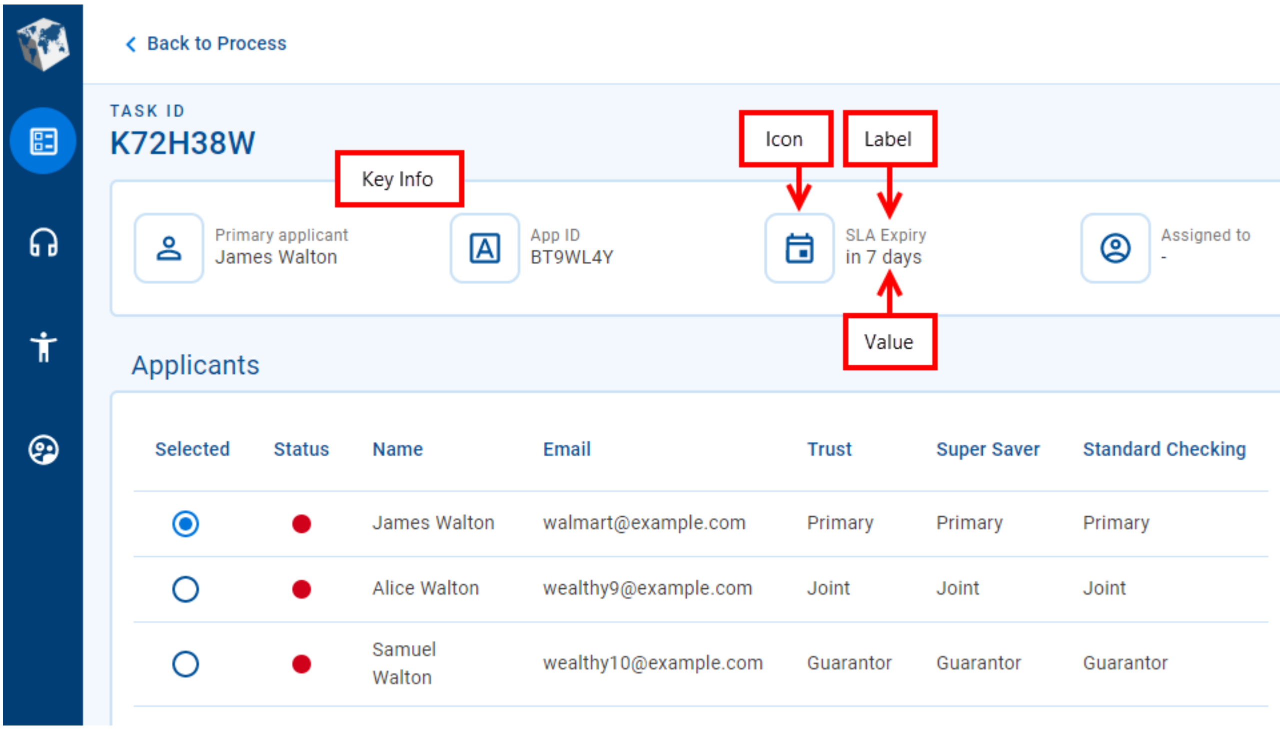

## Key Information

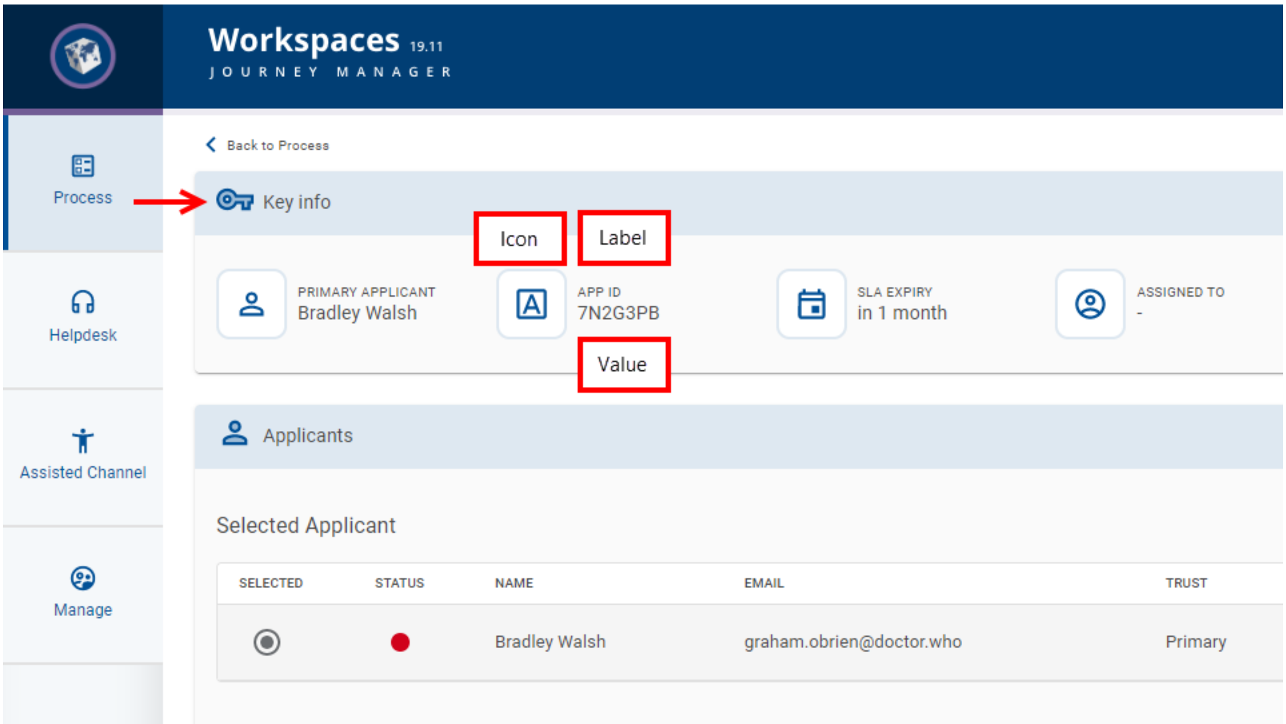
The Key Information card displays important application information that's handy for Workspaces staff to have at their fingertips.

- 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.

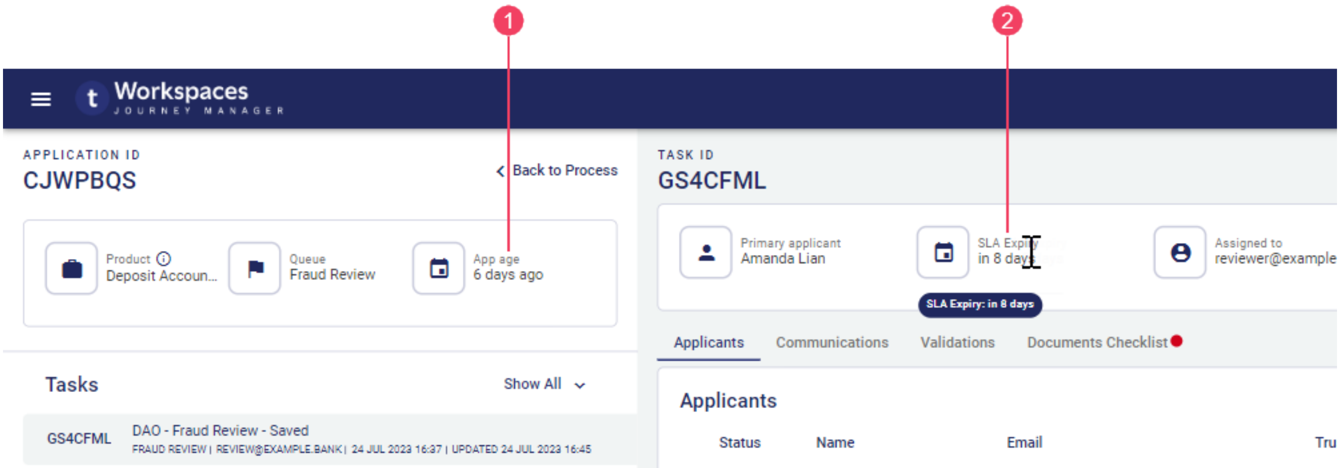
Each key info item shows a single value but this can be limiting for some kinds of information. To improve this situation, additional information can be displayed in a tooltip. When available, a tooltip is indicated by a infoTooltip icon. To view the tooltip, point your mouse at the infoTooltip icon. 22.10This feature was introduced in the 22.10 release

As an example, say you have an application type covering multiple optional products and you have a Product key info item. If an application includes multiple products, only the first product is displayed in the Product key info item. In this scenario, a tooltip could be configured to show all products included in the application.

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

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 either how much time remains to complete processing of the application or the elapsed time since the SLA was breached.




1. Application Age
2. SLA Expiry

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

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.

# 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.

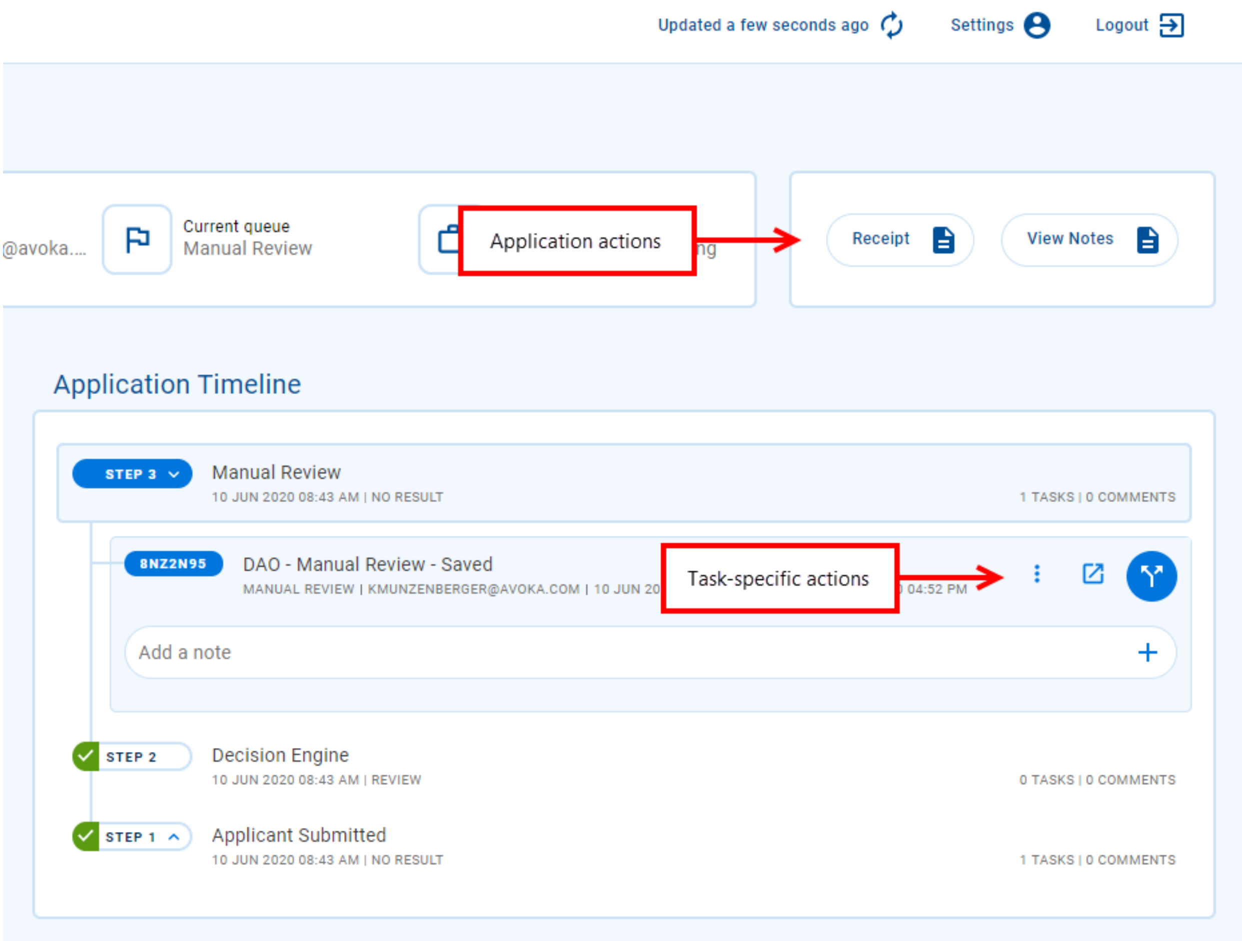
NOTE

The button labels and tooltips for the standard action types are configurable, so they may be different in your Journey Workspaces portal to what is shown in this documentation.

### Standard Actions (20.05 to 22.10)

Standard actions can be performed from any Details screen. The way standard actions are made available depends on 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 application timeline.



TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

You can use the Bulk Action feature to perform multiple actions at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

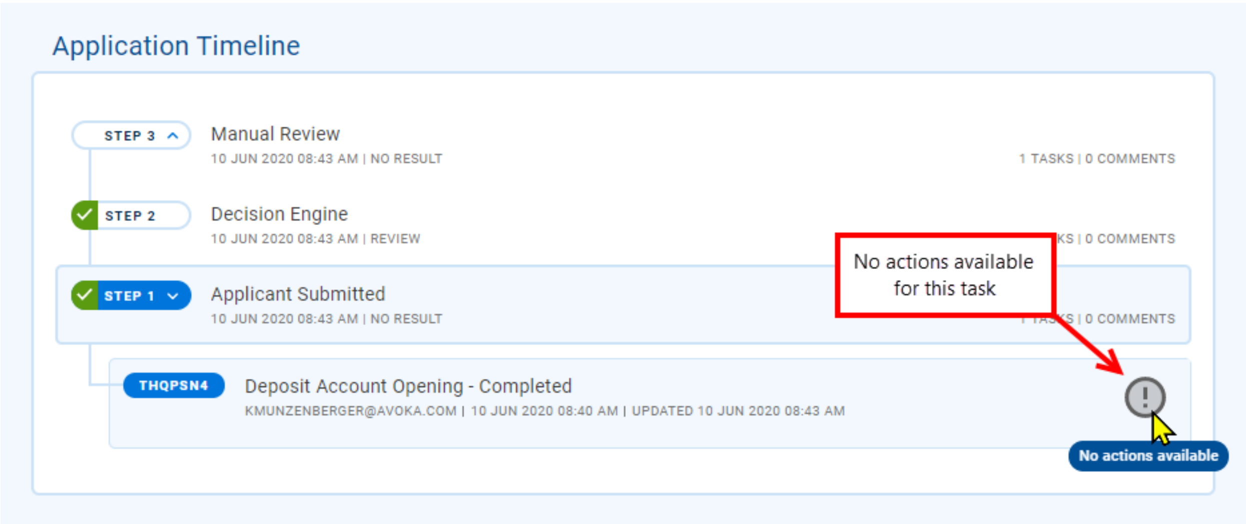
INFO

Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

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 no actions are available for a task, Workspaces indicates this by displaying the error (No Actions Available) icon, instead of the action buttons, with the icon's gray color reinforcing the lack of available actions.

INFO

The Receipt and Add Notes actions are always available in the default configuration, and if configured for your Journey Workspacesportal.



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

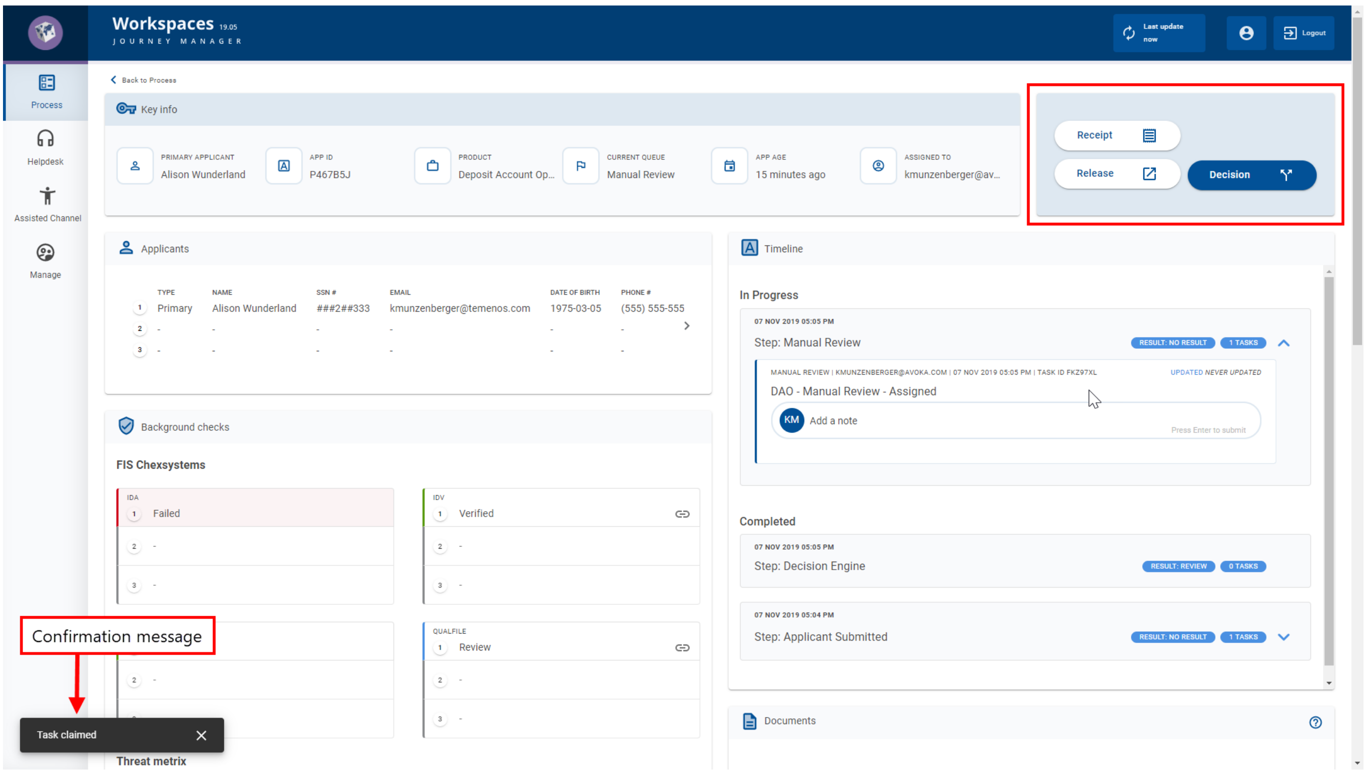
## Standard Actions (19.11 and earlier)

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.

> INFO
>
> The Receipt and Add Notes actions are always available in the default configuration, and if configured for your Journey Workspacesportal.

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



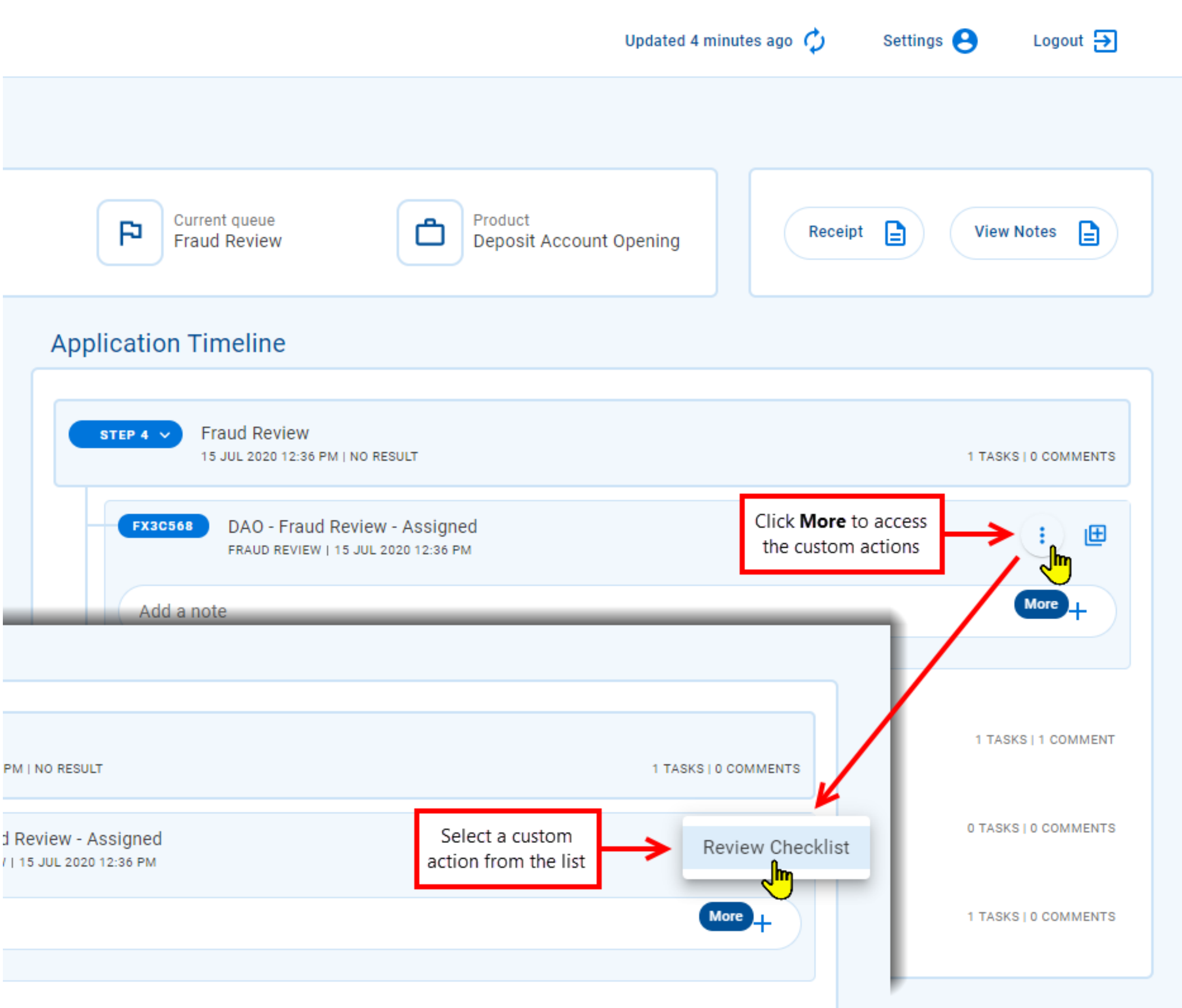
## Custom Actions

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.

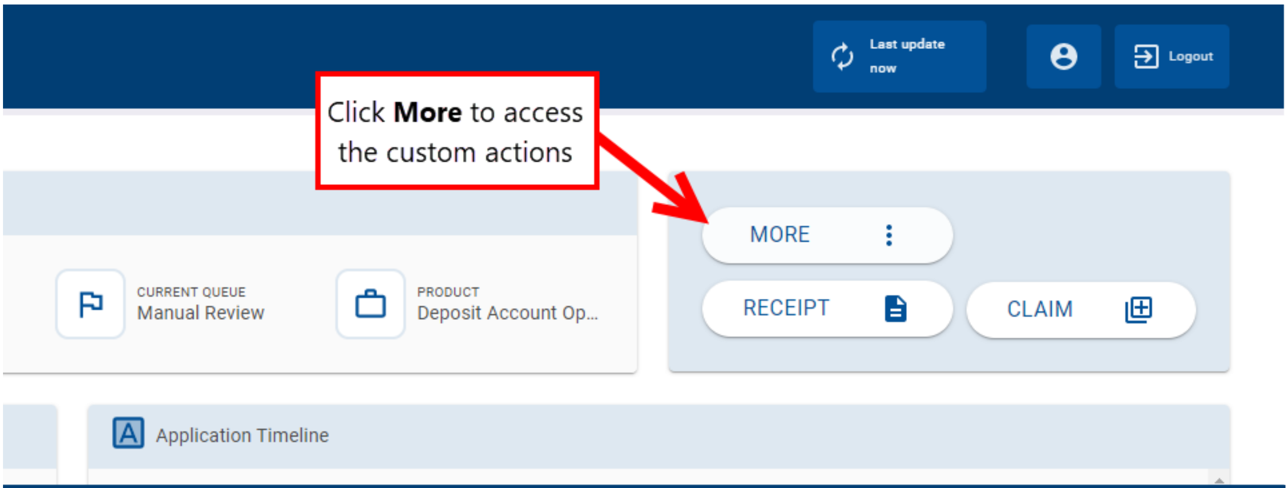
> INFO
>
> There are no custom actions in the default Workspaces configuration. Any available custom actions, and what they do, are specific to your Workspaces portal and are not covered by this documentation.

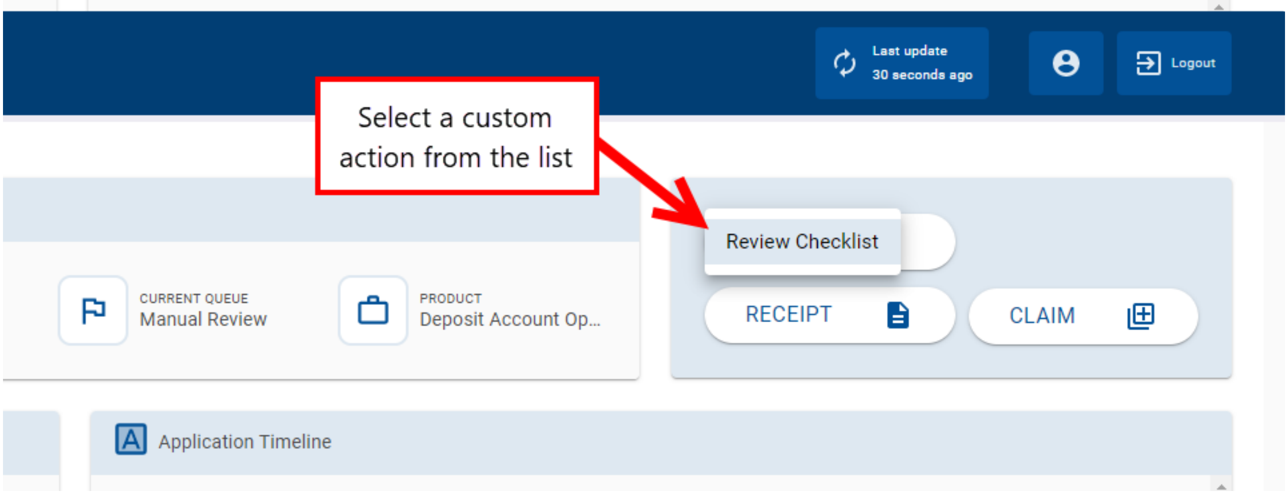
To perform a custom action, click then select the desired action from the More menu. Workspaces triggers the custom functionality in Journey Manager or another back-end system. What happens next depends on the configuration of the custom action, and user interaction may be required. Once the custom behavior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

- 20.05 to 22.10
- Prior to 20.05



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




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

[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.

- **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 to 22.10)

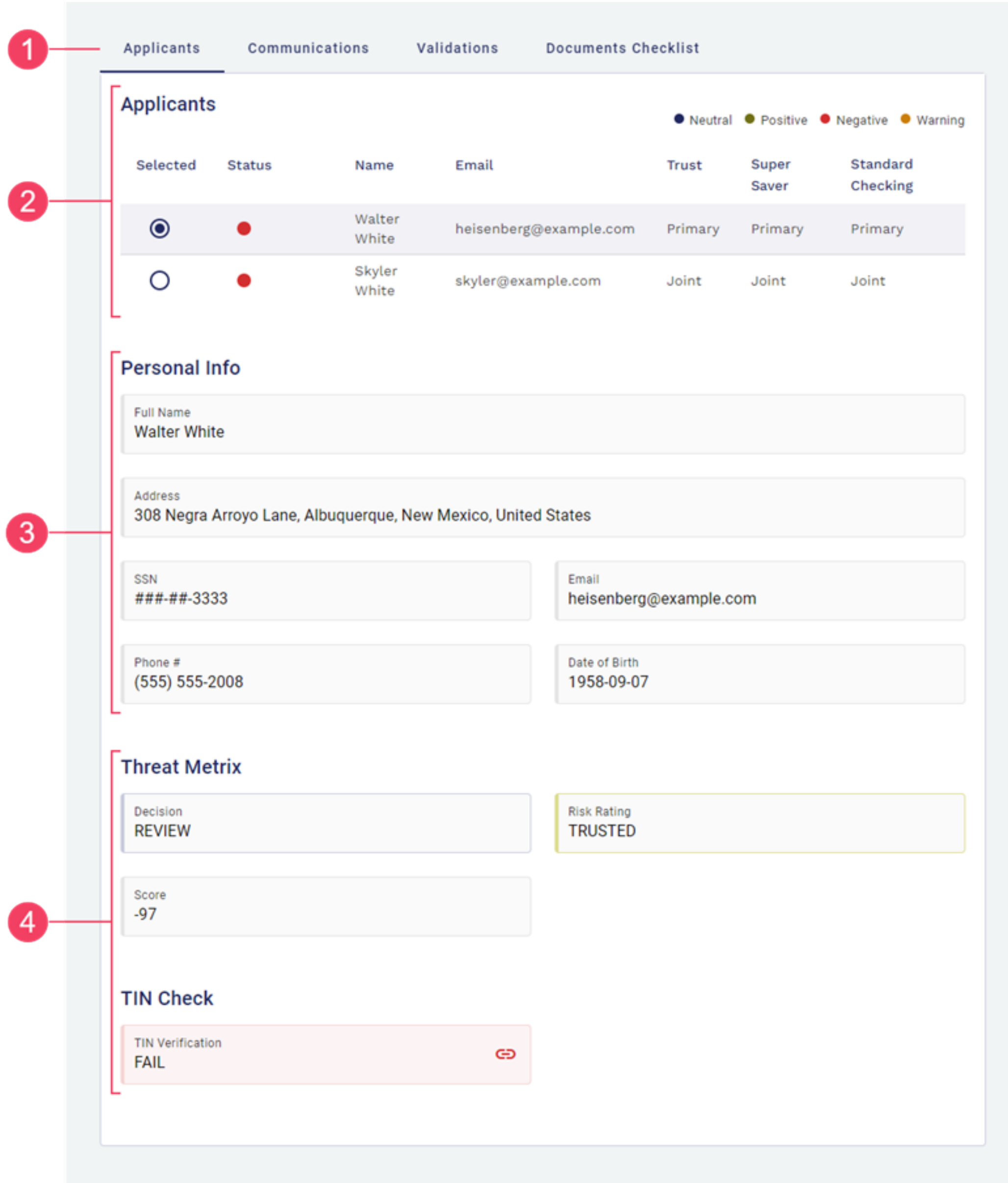
Applicant information is grouped together under the Applicants tab (22.10This feature was introduced in the 22.10 release) or card (prior to 22.10). In the default configuration, applicant information is displayed using the same three-section layout in all spaces:

- **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.

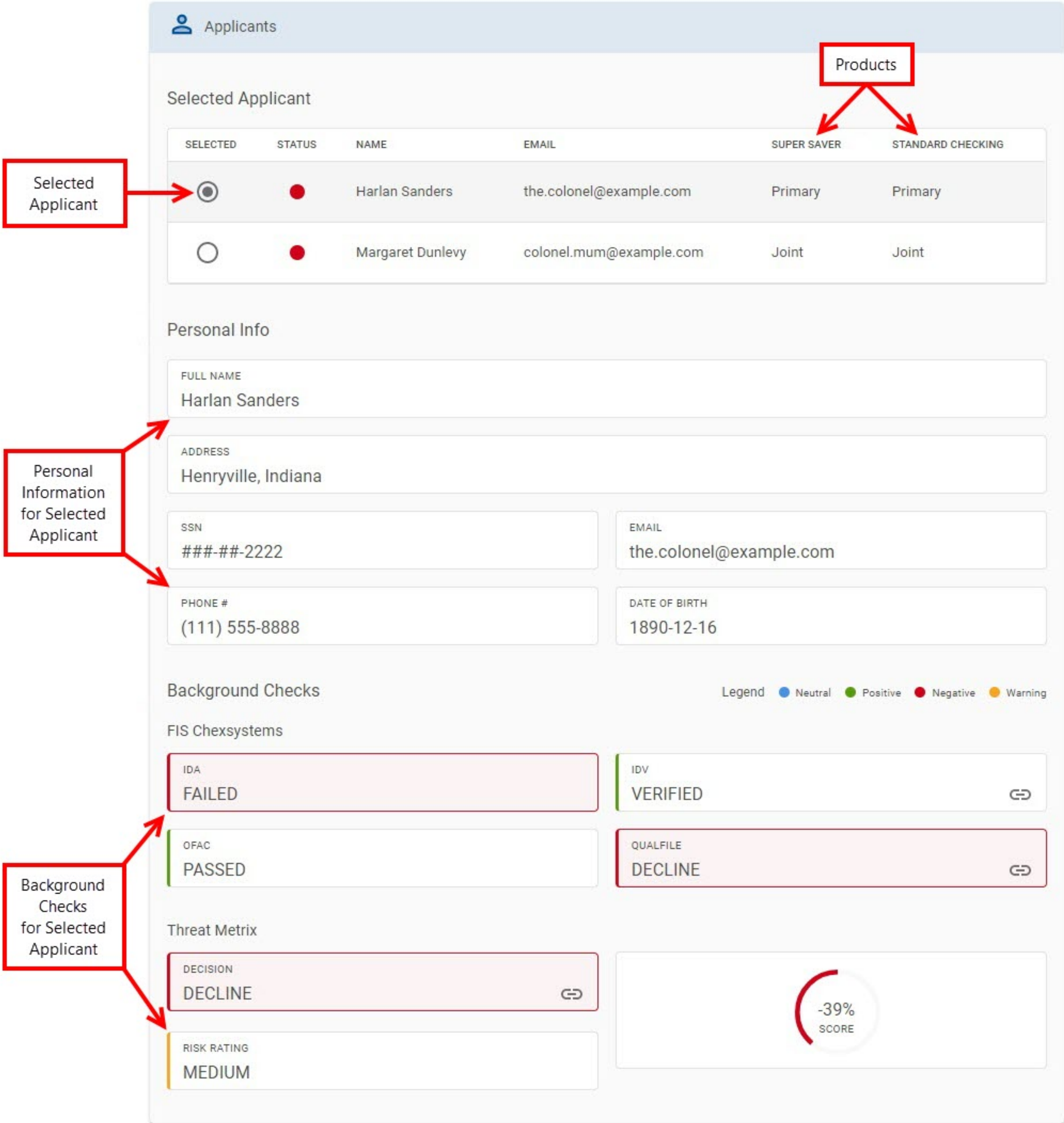
> INFO
>
> Background checks are highly configurable. The specific background checks in your Workspaces portal are configured for you by a Journey platform developer and cannot be changed by a Workspaces user.

- 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



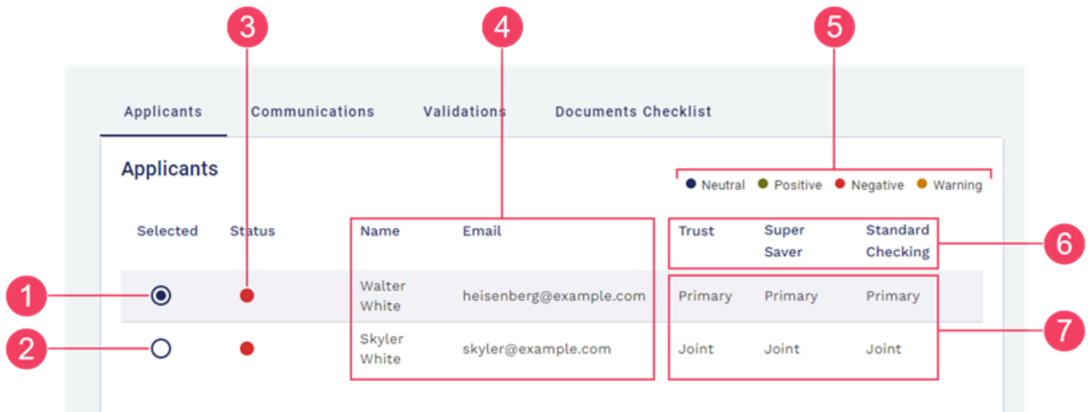

## Applicants section

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.)

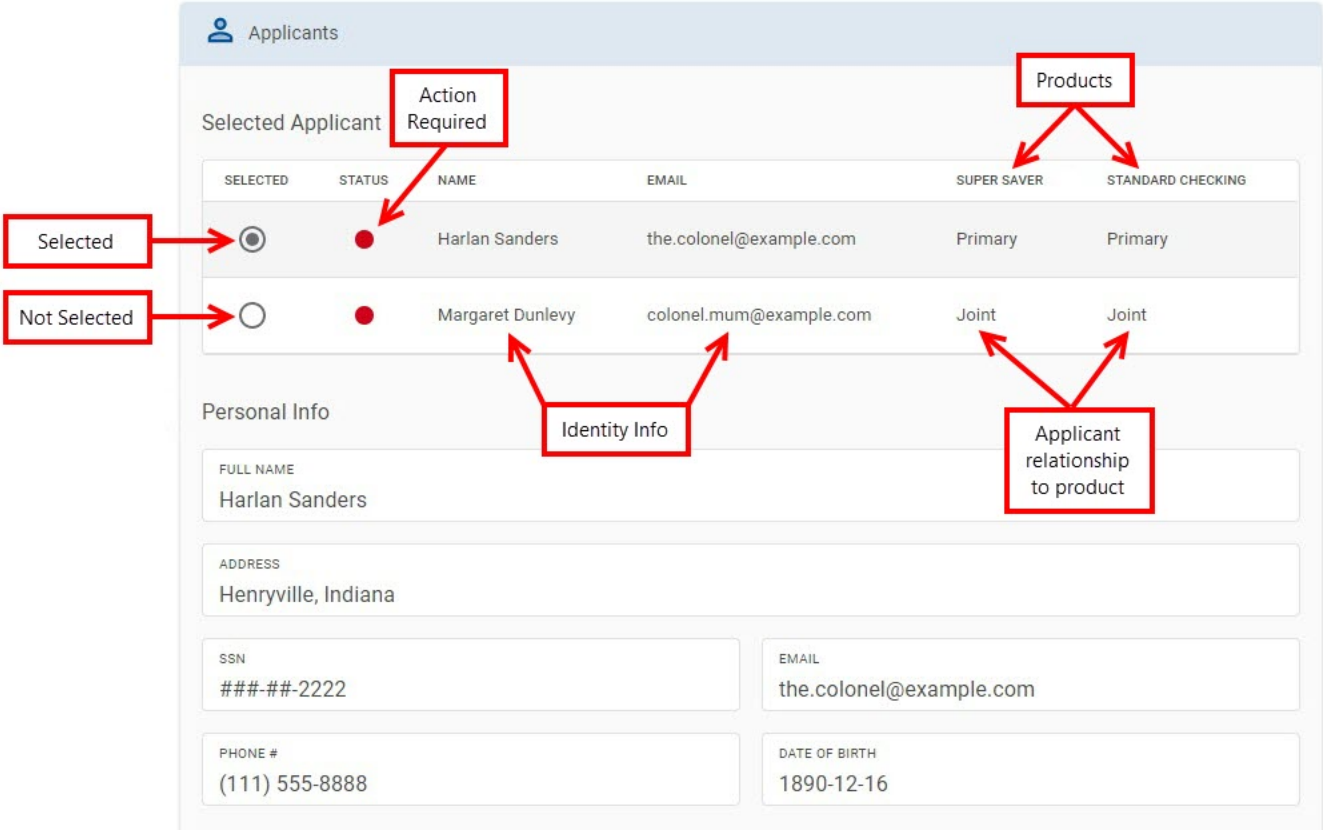
In the default configuration, the key applicant-related information shown for each applicant includes:

- 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 to 22.10, 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.

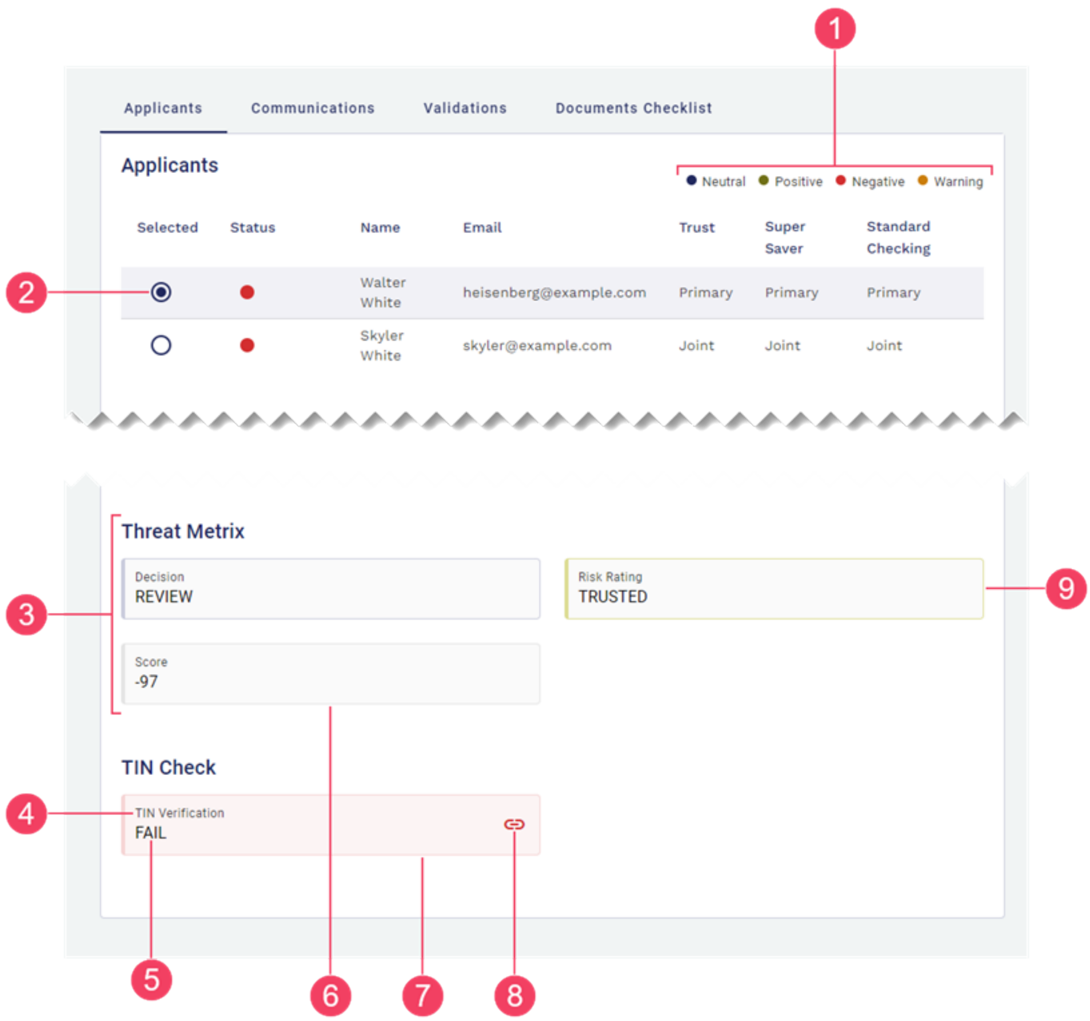
## Background checks

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.

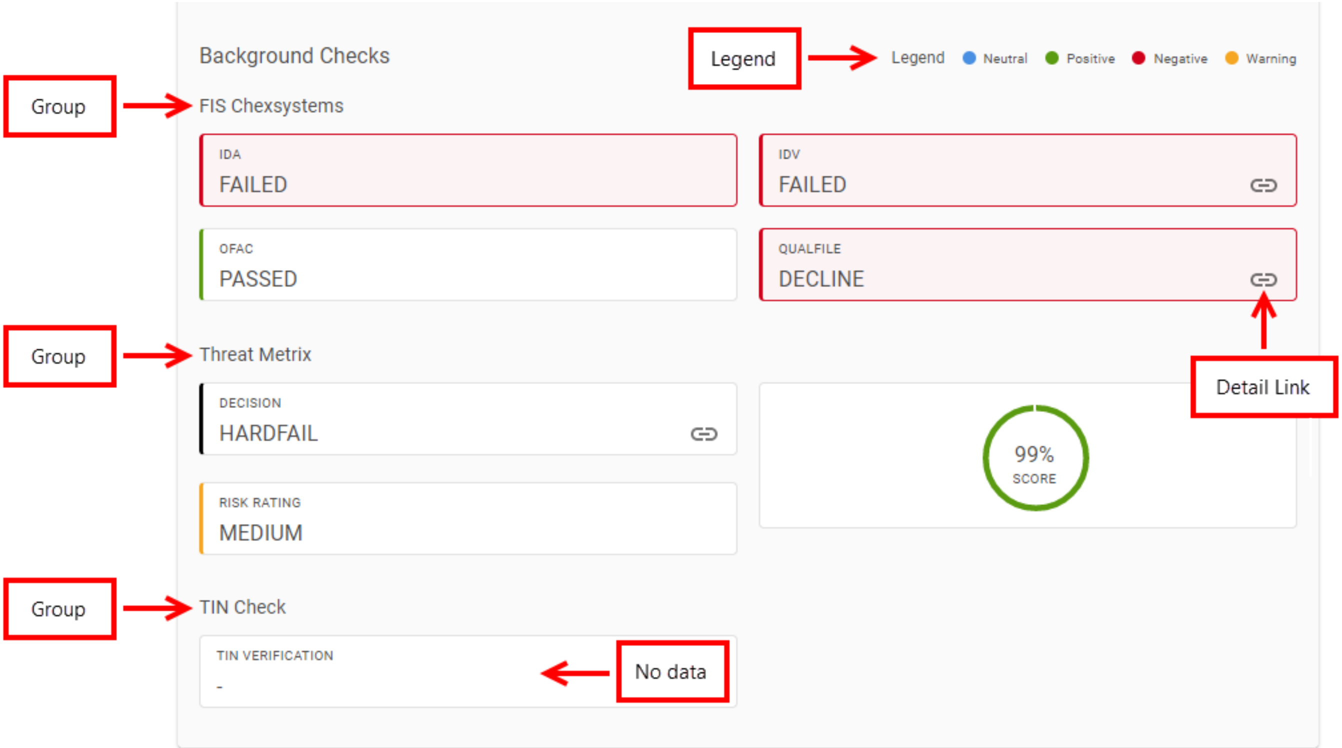
- 22.10
- Prior to 22.10

---

[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.

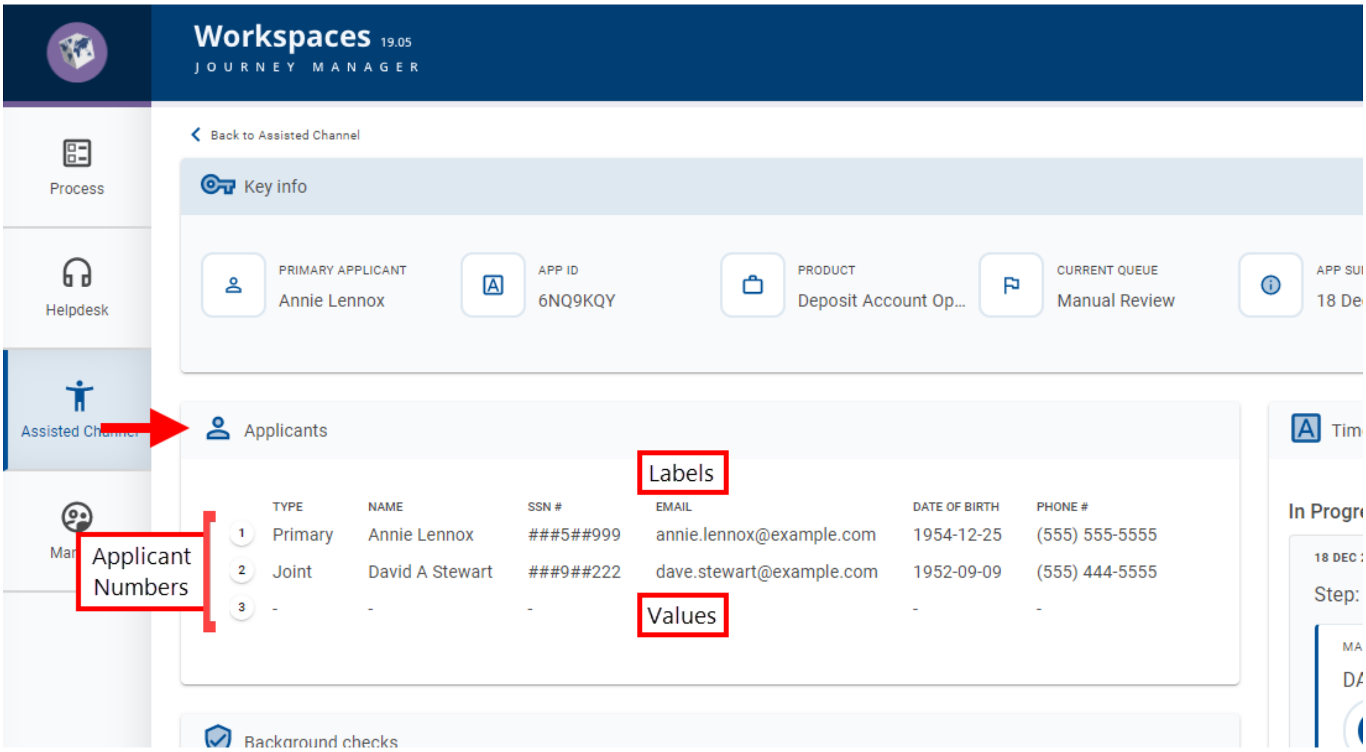
- **Green, Light Green:** Indicate positive results.
- **Red, Black:** Indicate negative results.
- **Blue:** Used for neutral states.
- **Orange:** Represents intermediate or other states.

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 linkDetail 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.



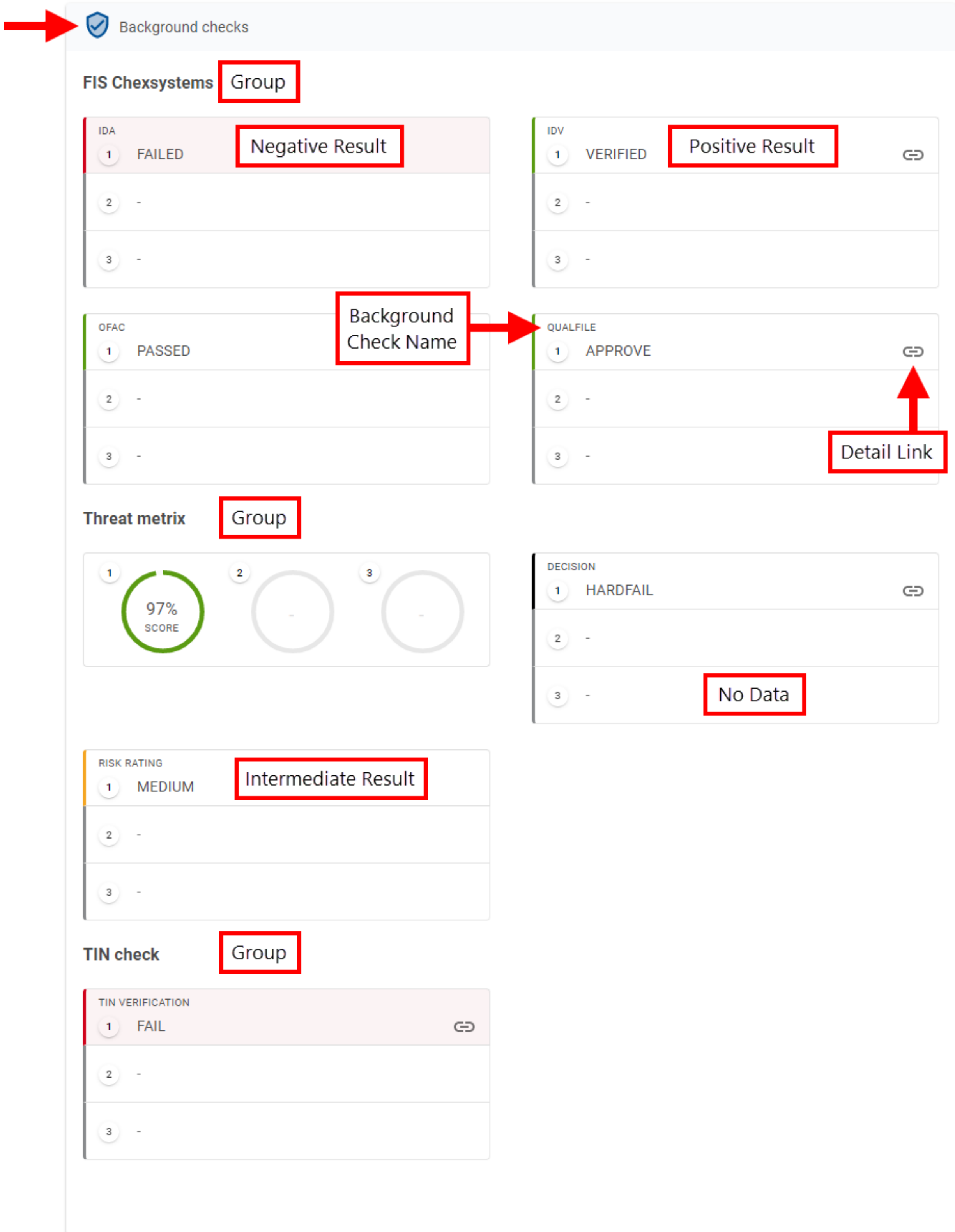

Personal information, which could include Personally Identifiable Information (PII) such as full name or email address, is displayed for primary and secondary applicants, with each applicant's details shown separately. A minimum of three applicants are shown; if there are less than three applicants,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

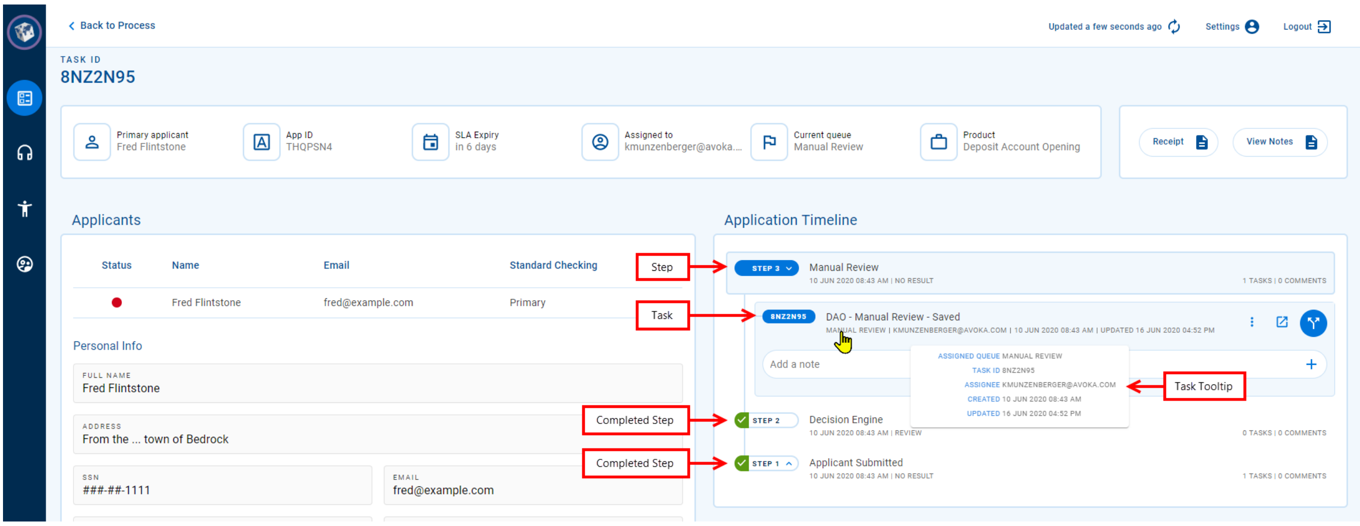
- **Green, Light Green:** Indicate positive results.
- **Red, Black:** Indicate negative results.
- **Blue:** Used for neutral states.
- **Orange:** Represents intermediate or other states.

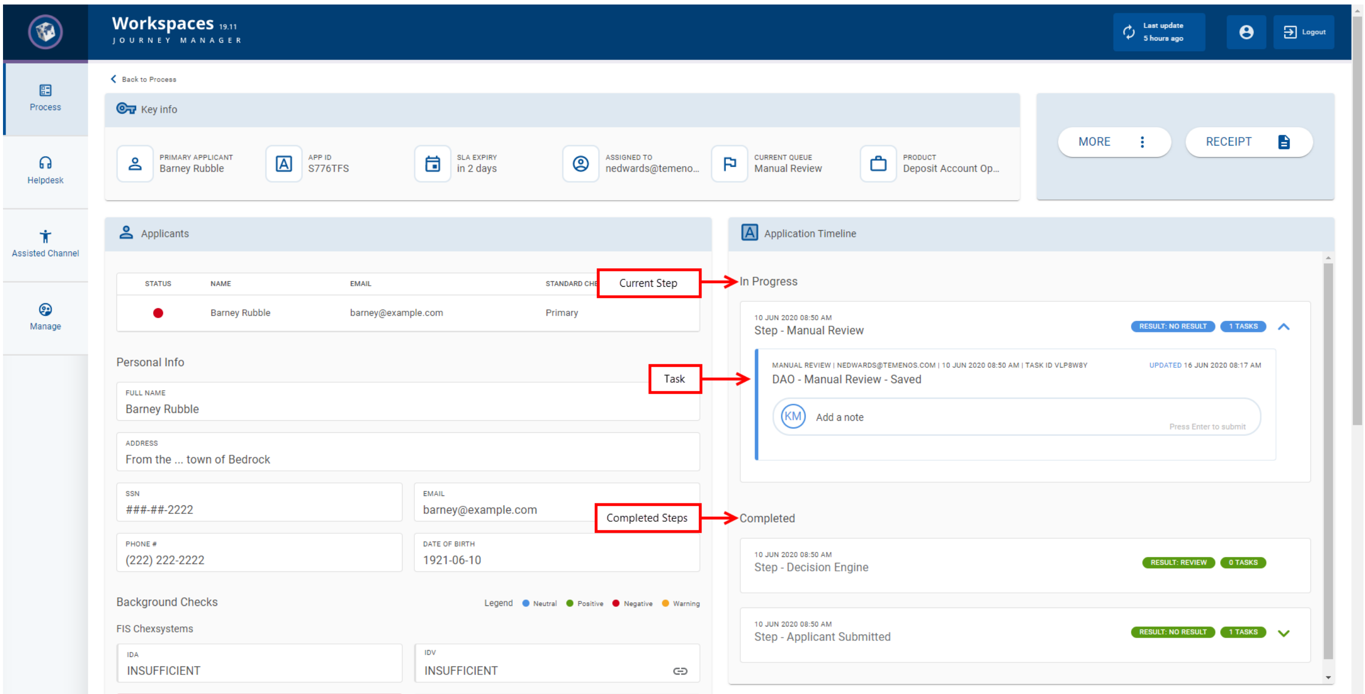
Some background checks have additional information associated with them which can be useful to understand how the result was determined. The availability of additional information is indicated by a linkDetail Link icon to the right of the result; click the link to view the additional information in a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

## Application timeline

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

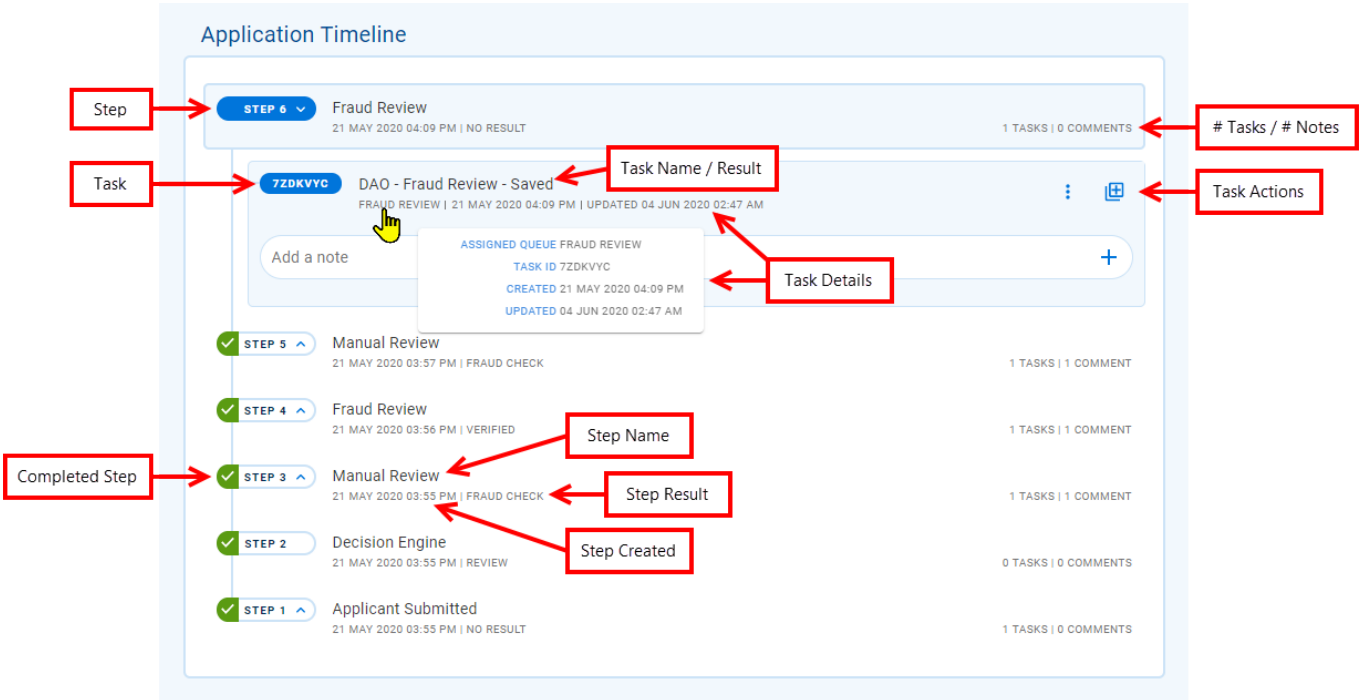
- 20.05 to 22.10
- Prior to 20.05




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 to 22.10)




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.

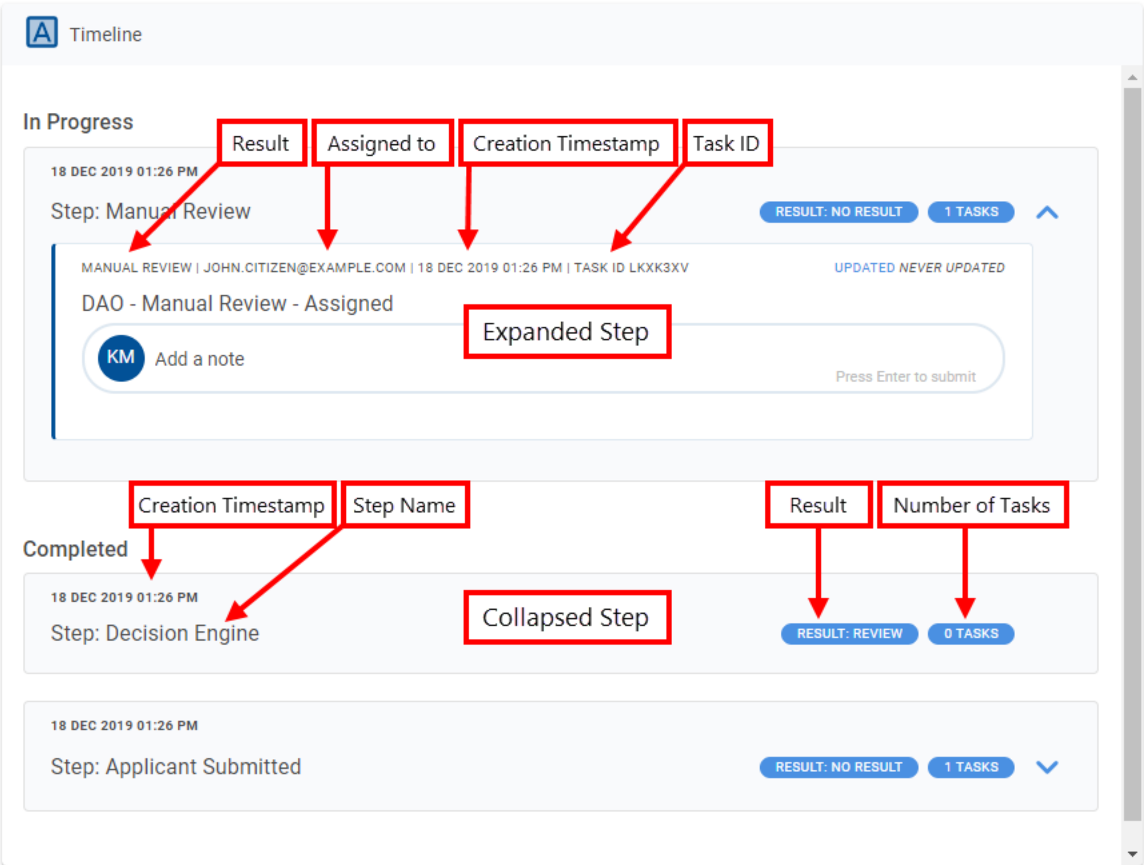
This information can also be viewed in a formatted tooltip that appears when you point your cursor at the task.

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 application 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.

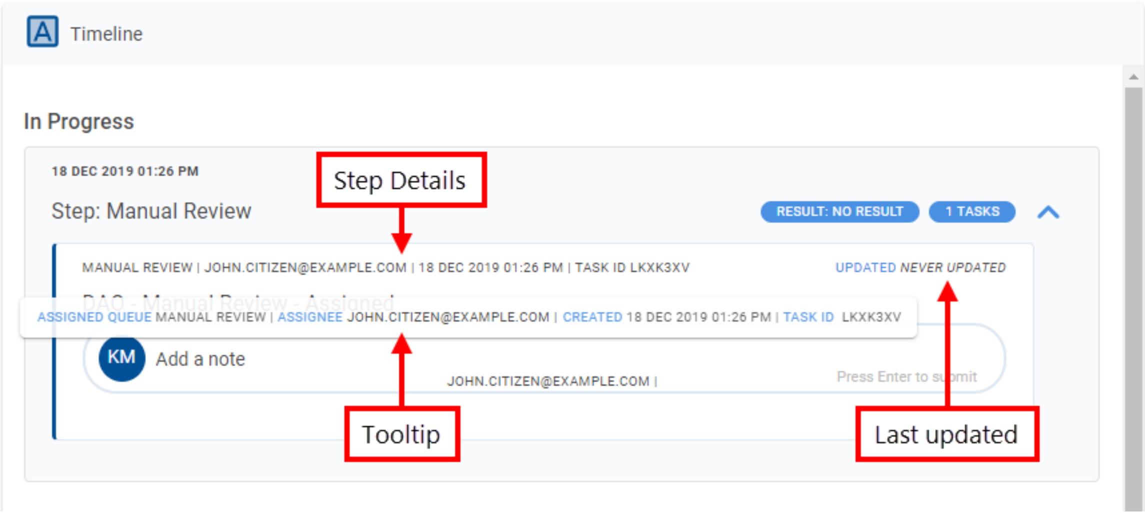
When a step is collapsed, the following details are shown:

- 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:

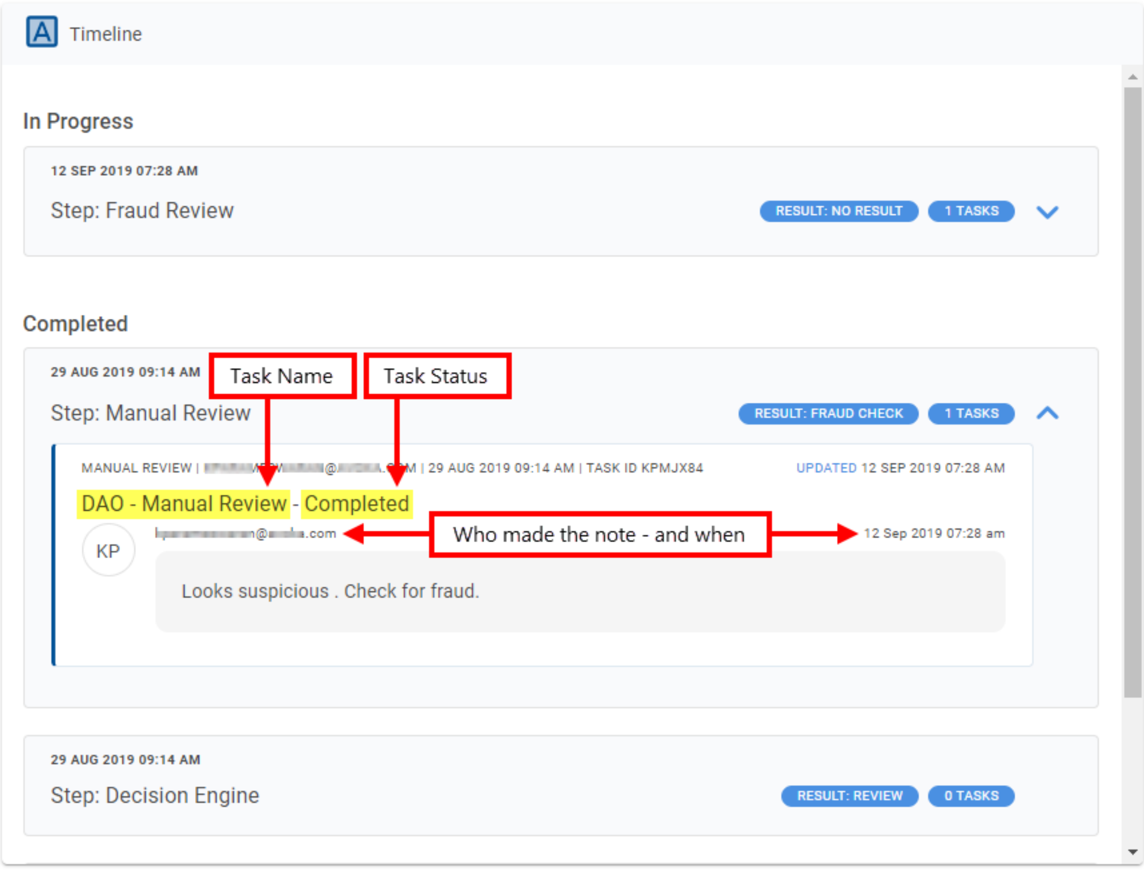
- The name of the queue that the task is or was sourced from.
- Who the task is or was assigned to (email address).
- The date/time that the task was created.
- The date/time that the task was most recently updated.
- The task ID; this is unique in your Workspaces portal.

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

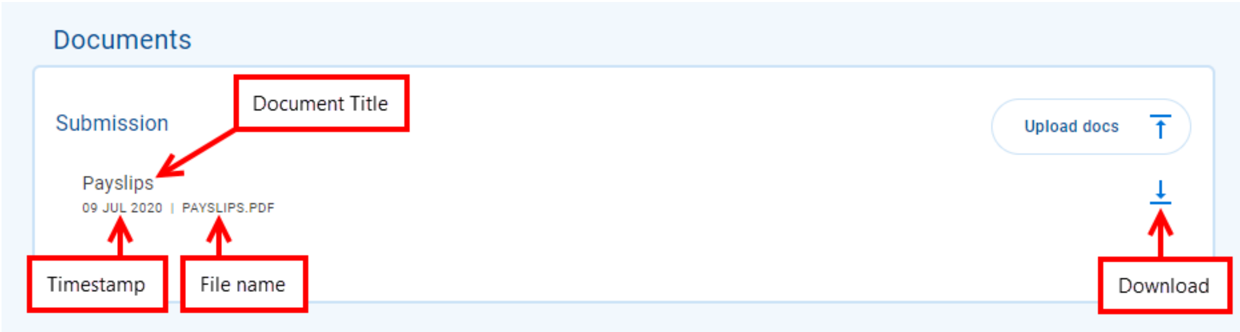
In Workspaces 19.05 and earlier releases, duplicate documents were not permitted. (Workspaces considers two files to be duplicates if they have the same document title (description), the same file name, or if they are copies of the same file with different file names.) Workspaces 19.11 relaxes this constraint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

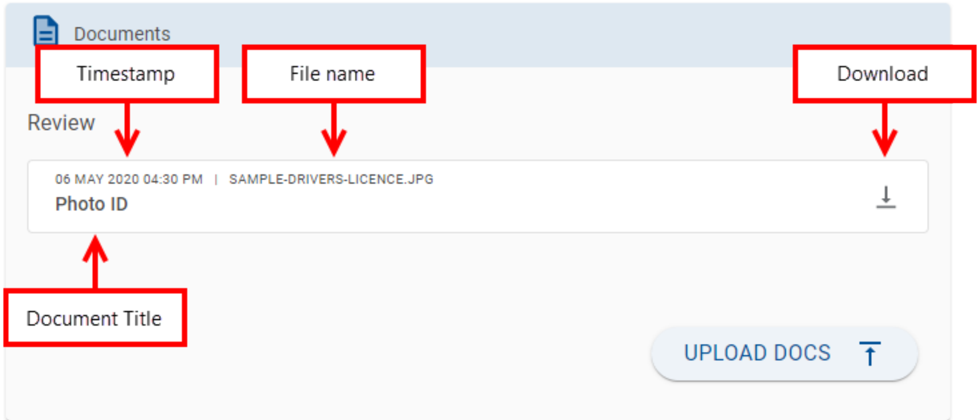
(missing snippet link)

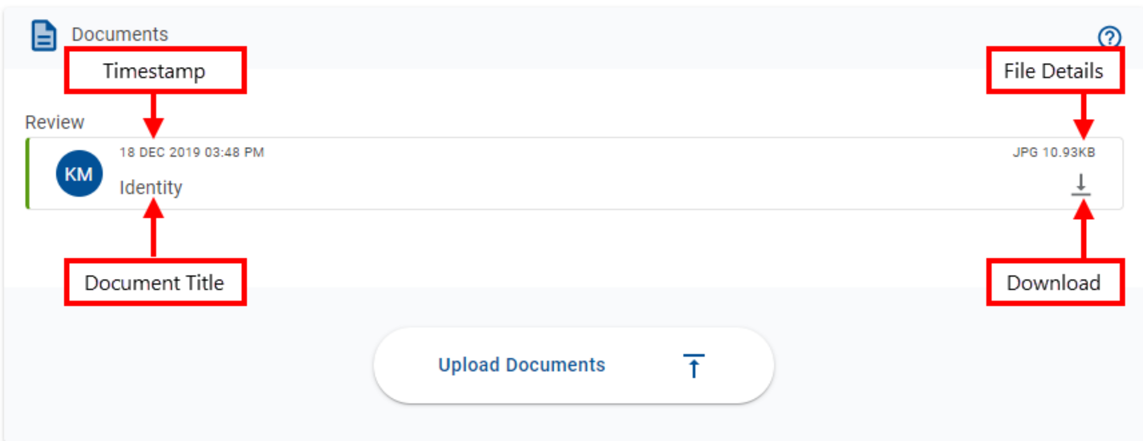
Each item in the Documents card contains the following elements.

- **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.
- **link**View detail**:** Available for supported document types only. On the right-hand side of each document item is an icon that you can click to view the document in a modal window. Supported document types are: JSON, XML, HTML, PDF, and some image formats (JPEG/JPG, PNG, GIF). 23.10This feature was introduced in the 23.10 release
- **vertical_align_bottom**Download**:** Available only if linkView detail is not available. On the right-hand side of each document item is an icon that you can click to download the document file.

- 20.05 and later
- 19.11
- Prior to 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.

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.

## 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.

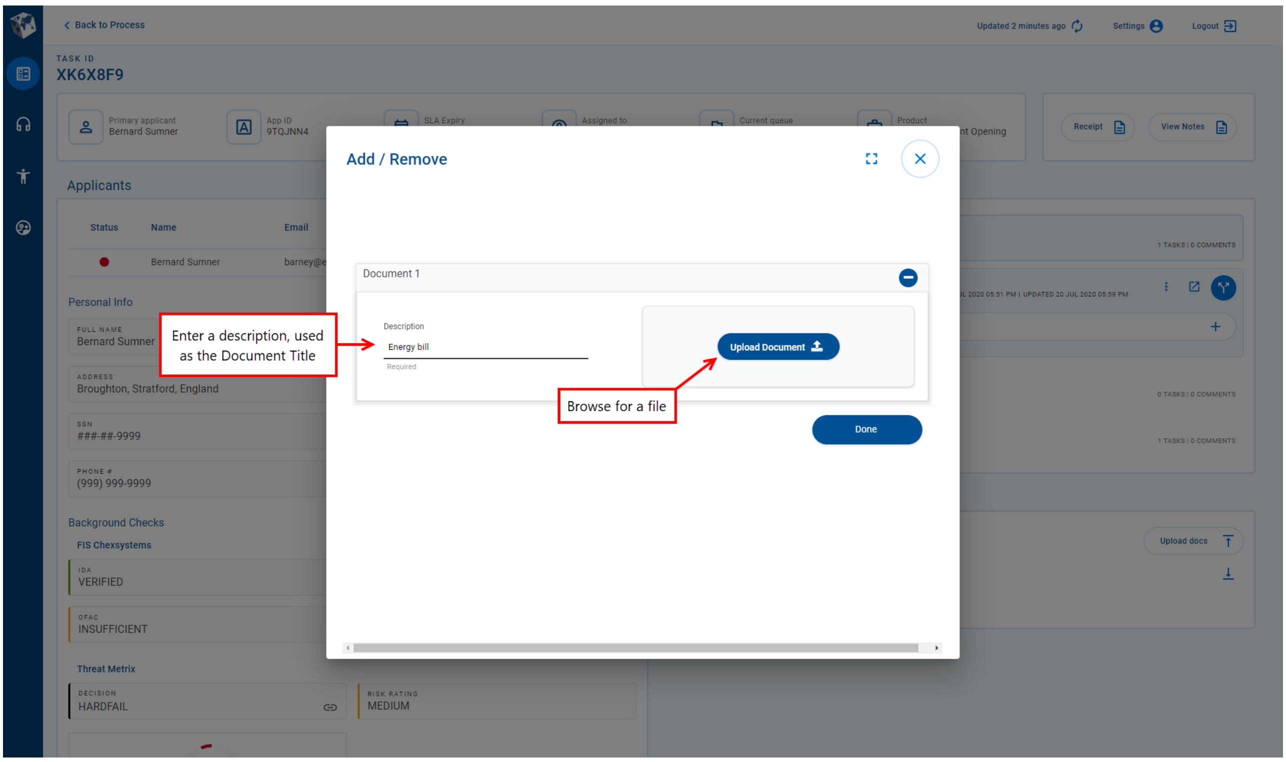
In Workspaces 19.05 and earlier releases, you can only upload documents for tasks that are assigned to you. Workspaces 19.11 relaxed this constraint in the default configuration, allowing Workspaces to be configured so that anyone can upload a document to any application, regardless of who it is assigned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

INFO 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

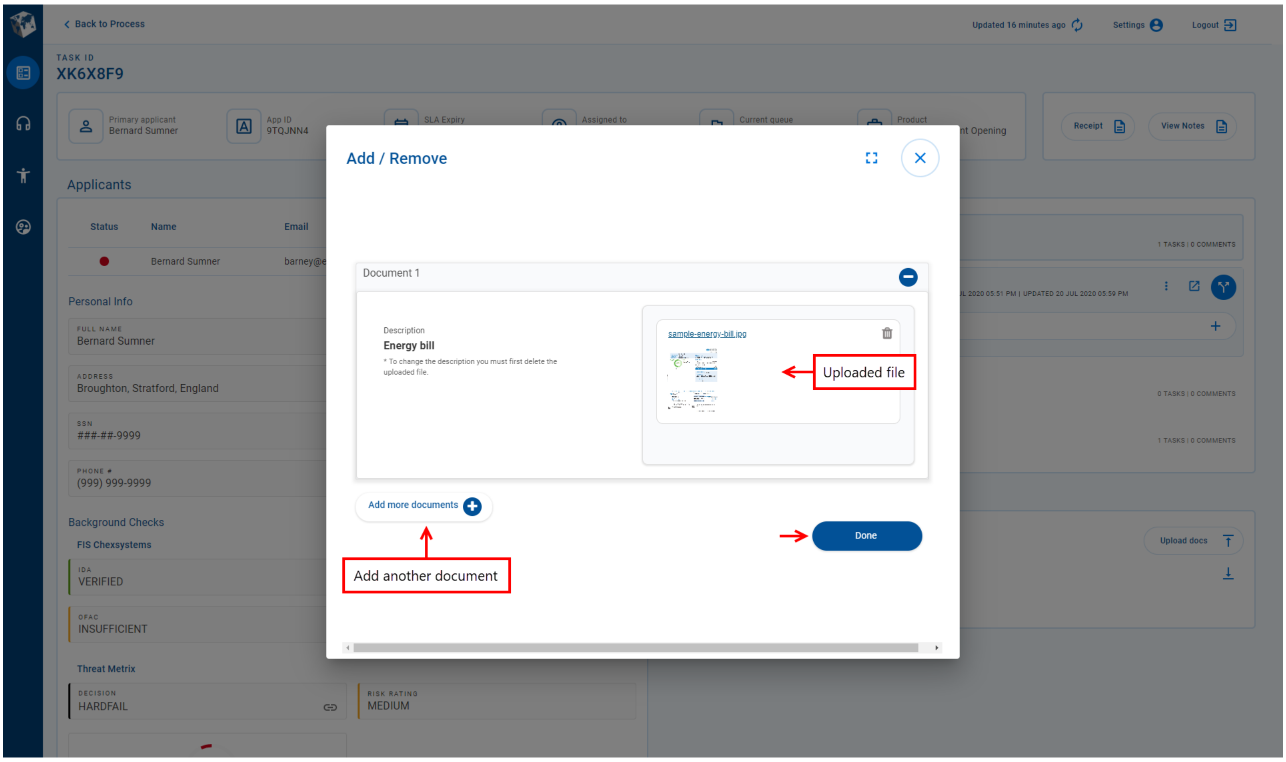
By default, the option to upload a document is usually available. However, Workspaces can be configured with conditional rules, based on task or application data values, that control whether the document upload option is available.

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 closeClose when you're finished uploading documents.

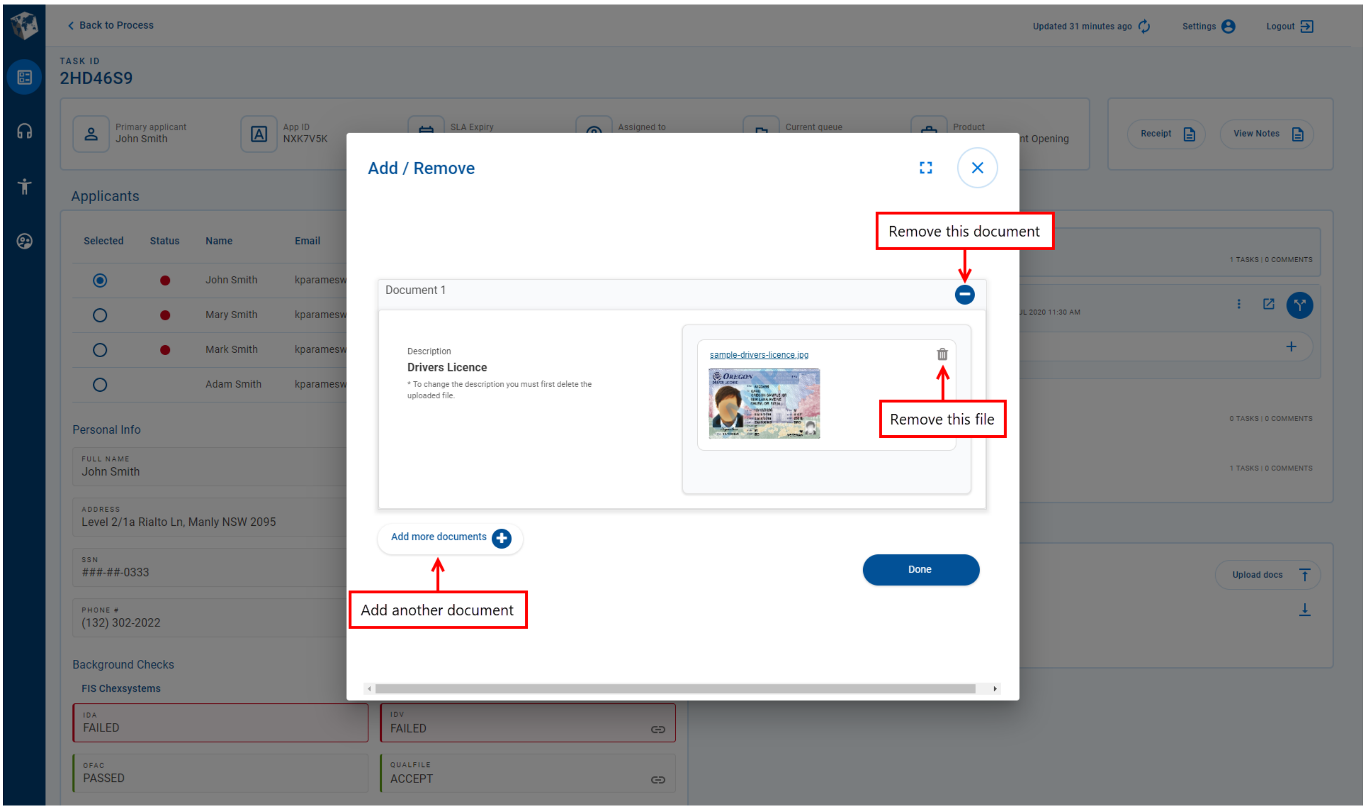
## Manage Application Attachments

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 do_not_disturb_onRemove File 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 deleteRemove Document adjacent to this document.

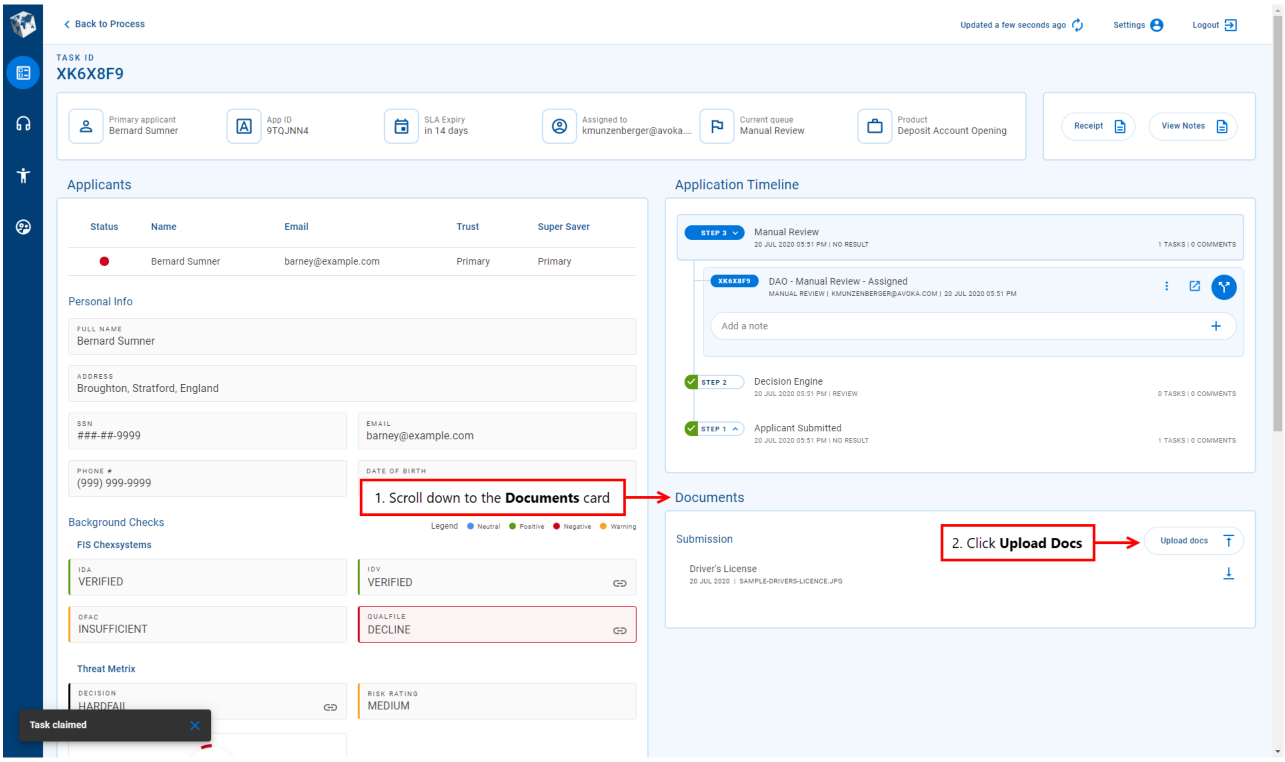
The following image shows where you can find the various attachment management features.



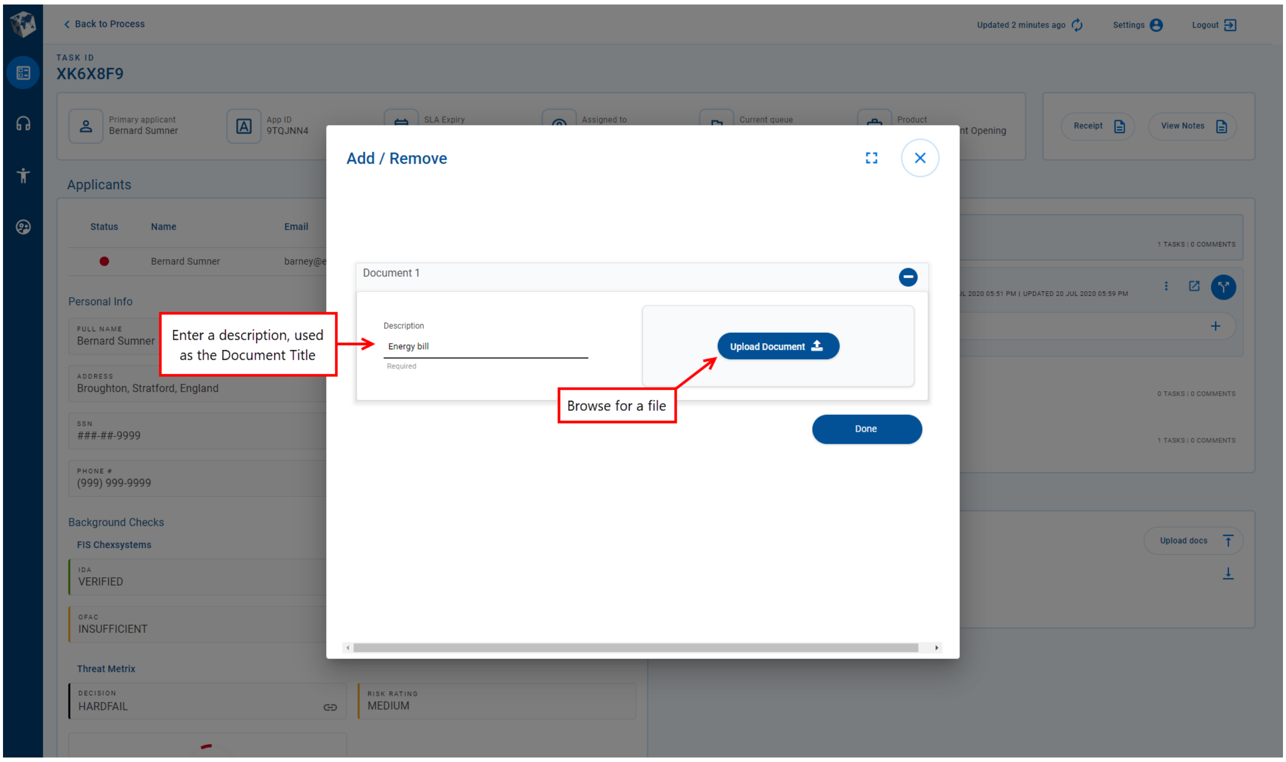

## Upload a Document Example

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 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 Add / Remove Documents modal window.

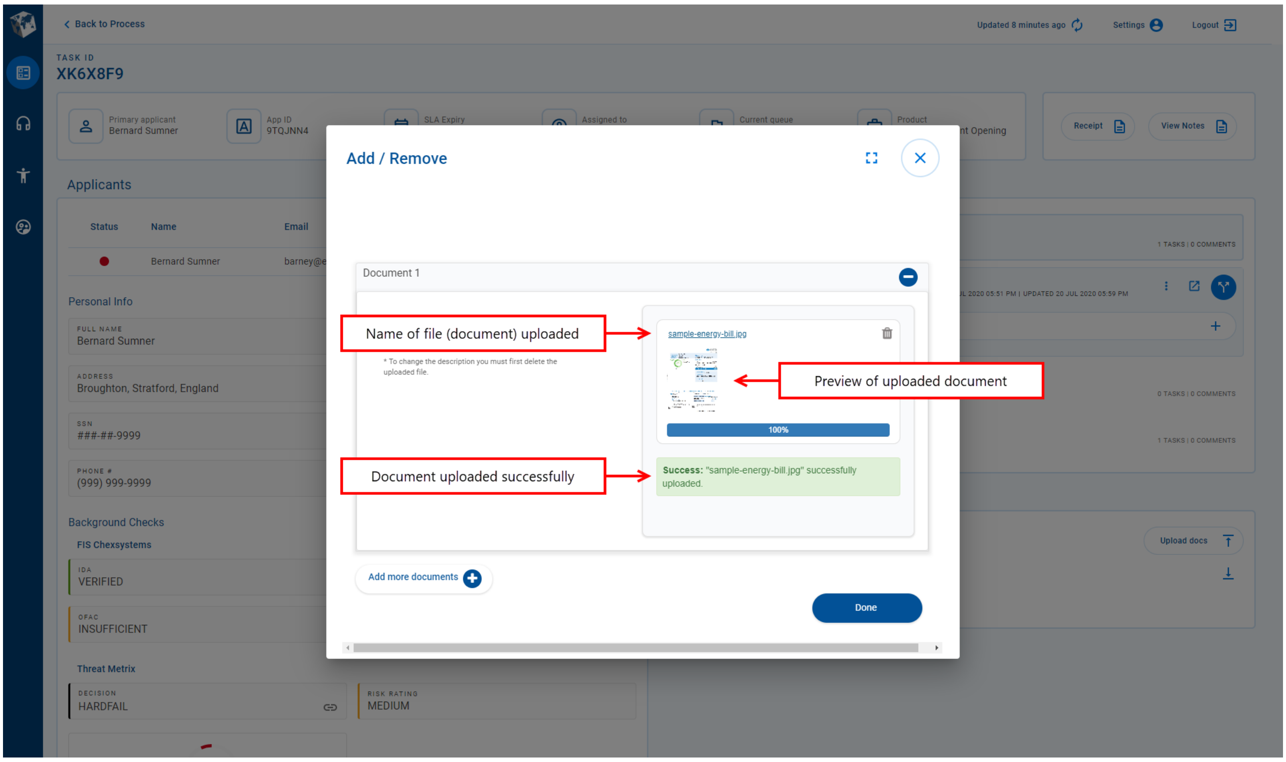



4. Enter a description for the document that you want to upload. Note that the Upload Document button on the right is disabled until you enter something in the description field.

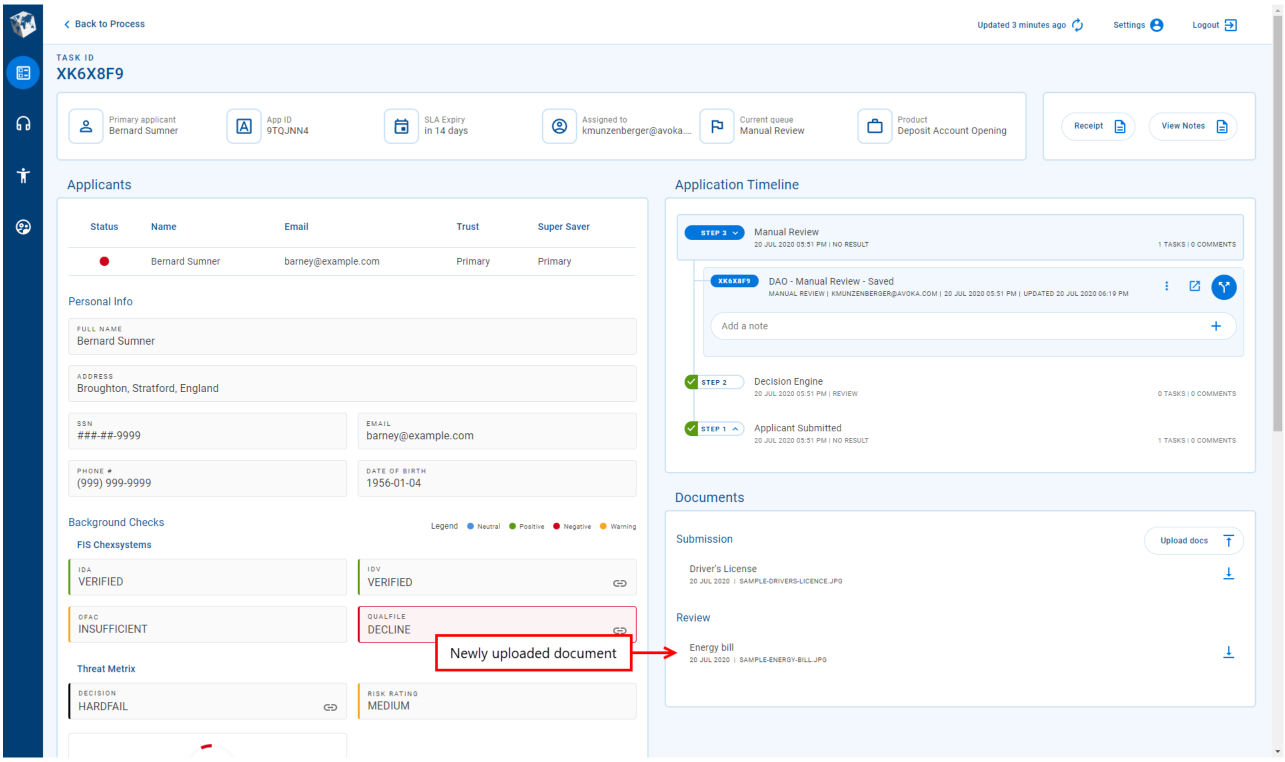



5. Click Upload Document, then browse to and select the document file you want to upload. A message is displayed briefly confirming that the document has been uploaded

successfully.




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



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

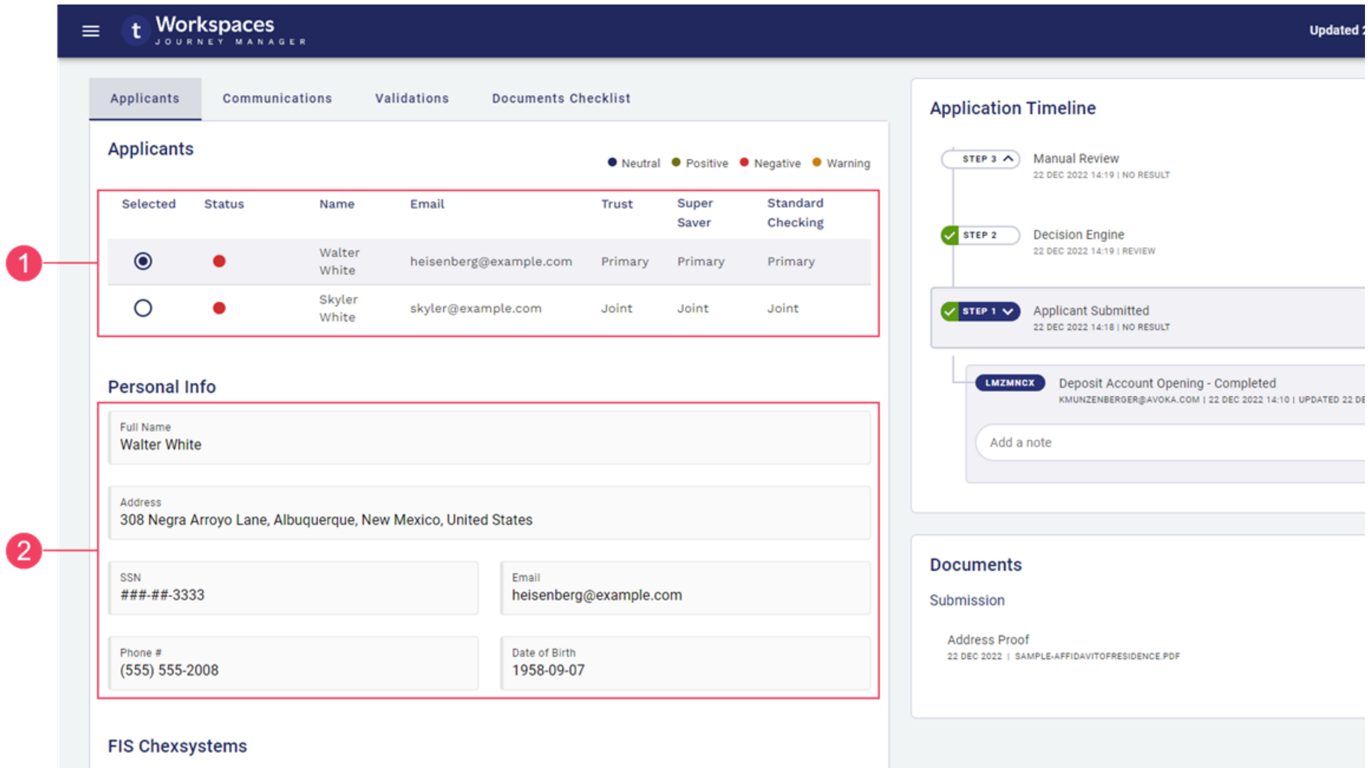
## Custom content

Much of the Workspaces user interface presents various types of content (information and features) in components or layouts specifically designed for each content type. In addition to the standard content types described above, your Journey Workspaces portal may also be configured with additional custom content specific to your organization. While custom content is more commonly available on the Details screen in separate tabs 22.10This feature was introduced in the 22.10 release, you may also find it used on the List screen in expansion rows.

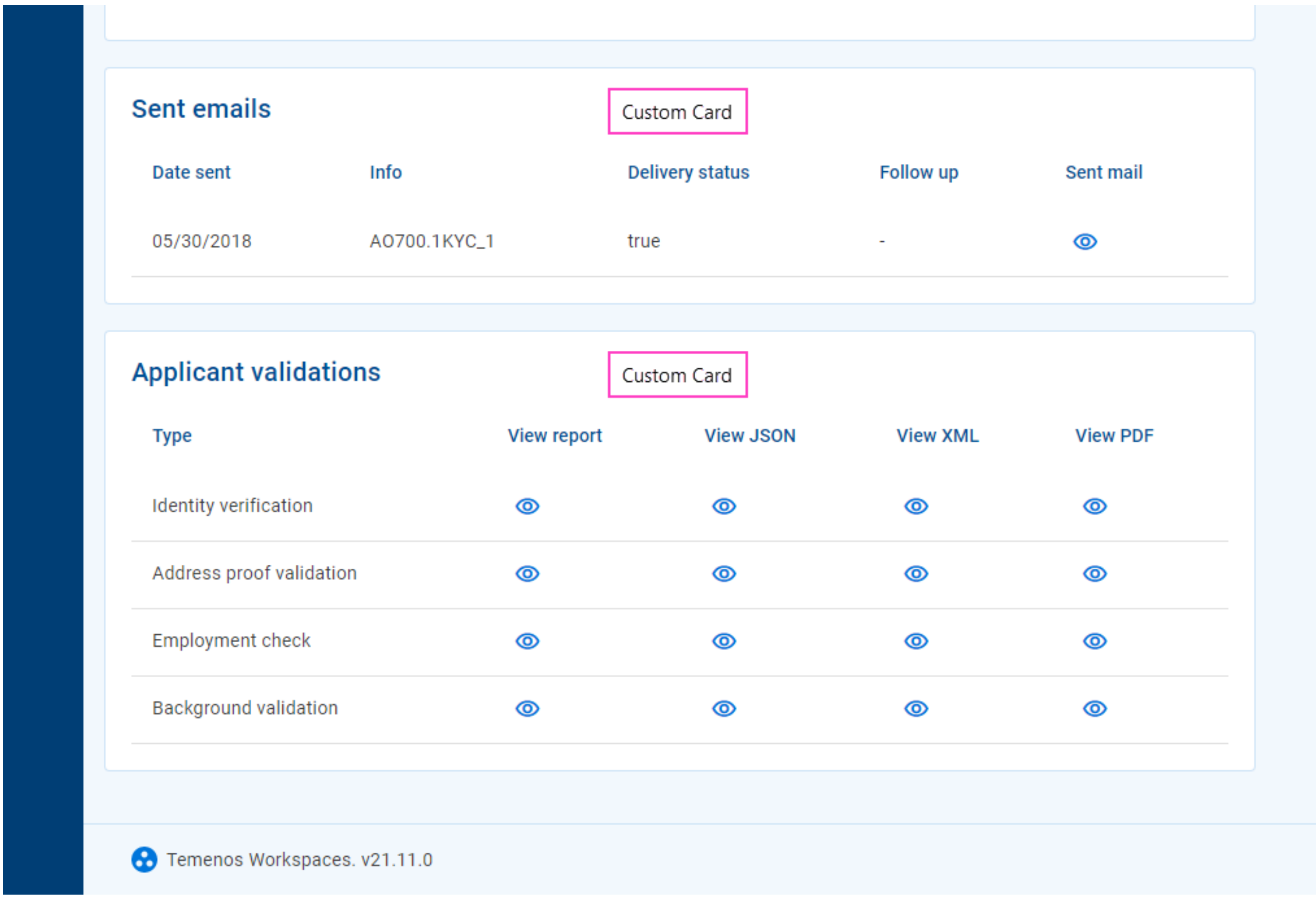
Workspaces supports two format options for custom content, designed for two different kinds of data:

- **Multi-value data:** Content is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different kind of content, identified by the column header, while each row relates to a single entity such as an applicant, a background check, or a document. Each individual data item is either a simple text/number display or an icon button that links to additional details or functionality. All data items in the same column are of the same type.
- **Single-value data:** Each data item in a container (such as a tab, card or section) is displayed separately, with a label and value, and an optional icon button that links to additional details or functionality.

- 22.10
- Prior to 22.10




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



INFO

Custom content 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.

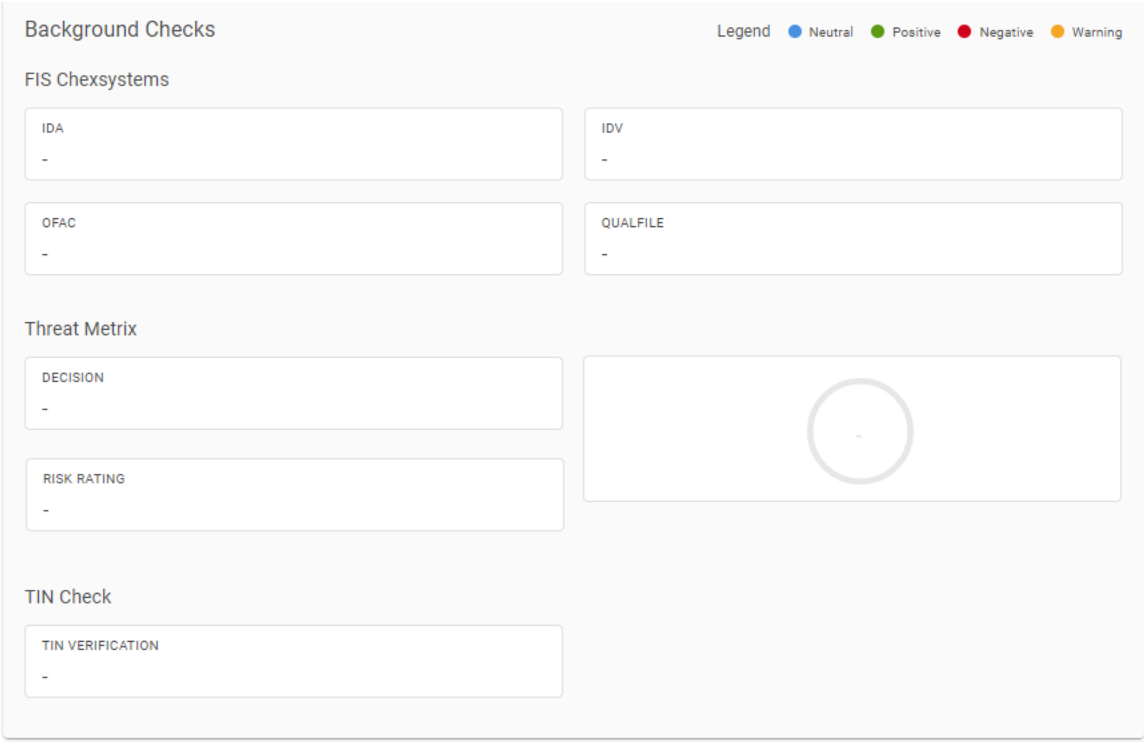
Several icon types are supported for icon buttons in custom content:

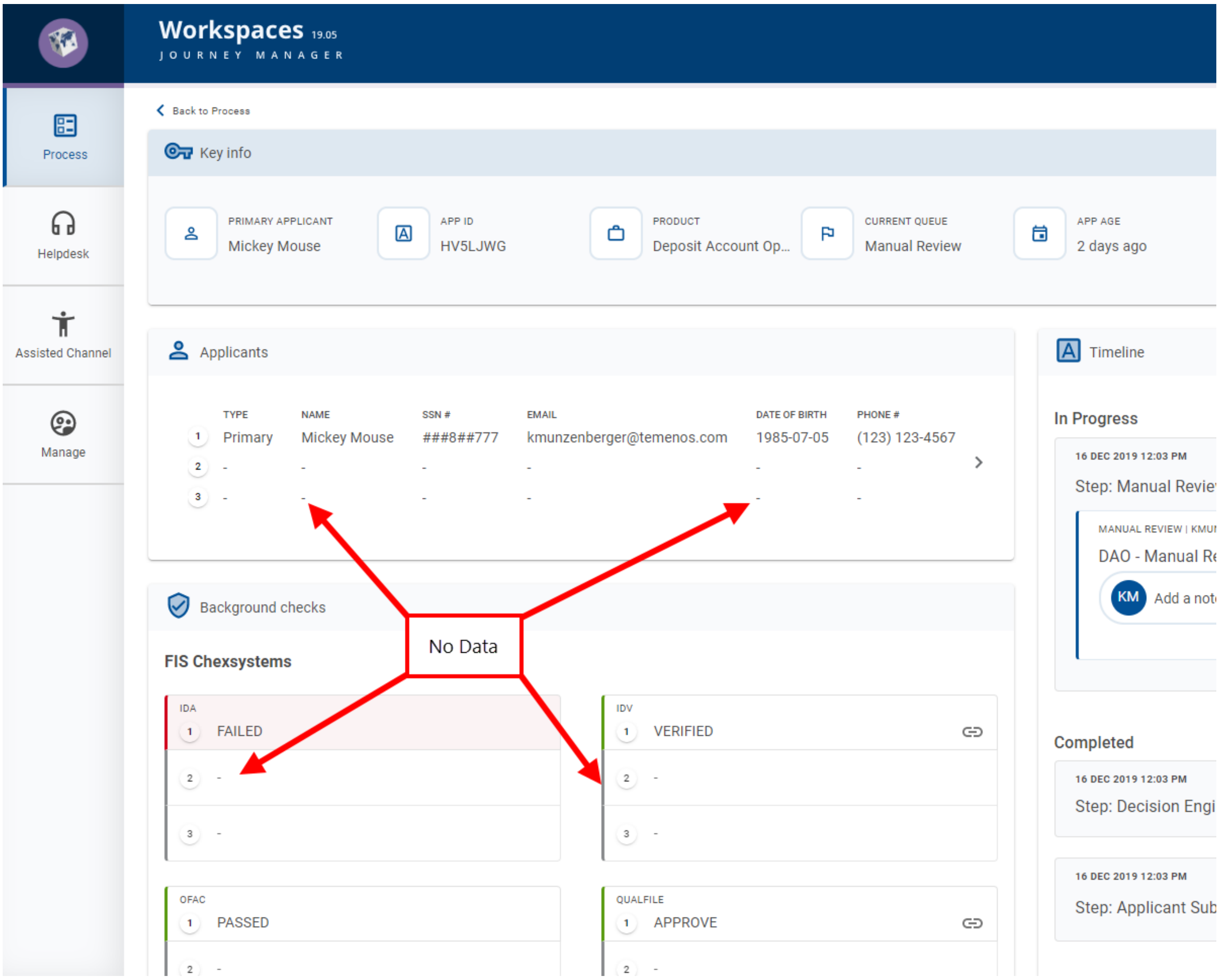
- **link**Detail Link**:** Indicates additional details are available to view. Click the icon button to display the additional details in a pop-up window.
- **vertical_align_bottom**Download**:** Indicates the additional details are available to download. Click the icon button to download the file containing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

## 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


Background Checks
Legend
Neutral
Positive
Negative
Warning
FIS Chexsystems
IDA
-
IDV
-
OFAC
-
QUALFILE
-
Threat Metrix
DECISION
-
RISK RATING
-
TIN Check
TIN VERIFICATION
-




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

# Reviewing applications

NOTE

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

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 Review space, complete with a List screen and a Details screen configured with features designed to make application processing fast and efficient.

The Review space works in conjunction with the Document Requests space, providing a mechanism for interaction between applicants and reviewers; in particular, to enable communication between an applicant and bank staff when the applicant needs to upload documents required for application processing. | 22.10 This feature was introduced in 22.10.

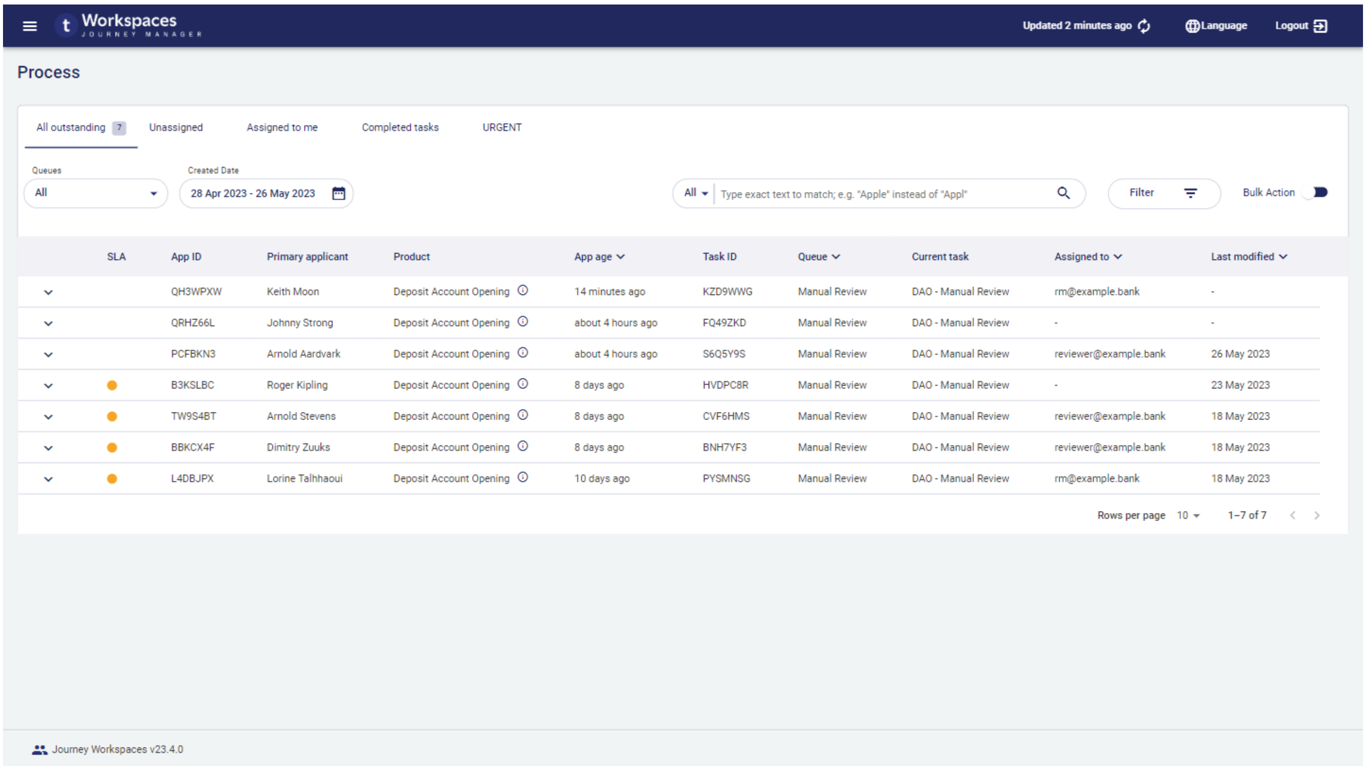
## List Screen

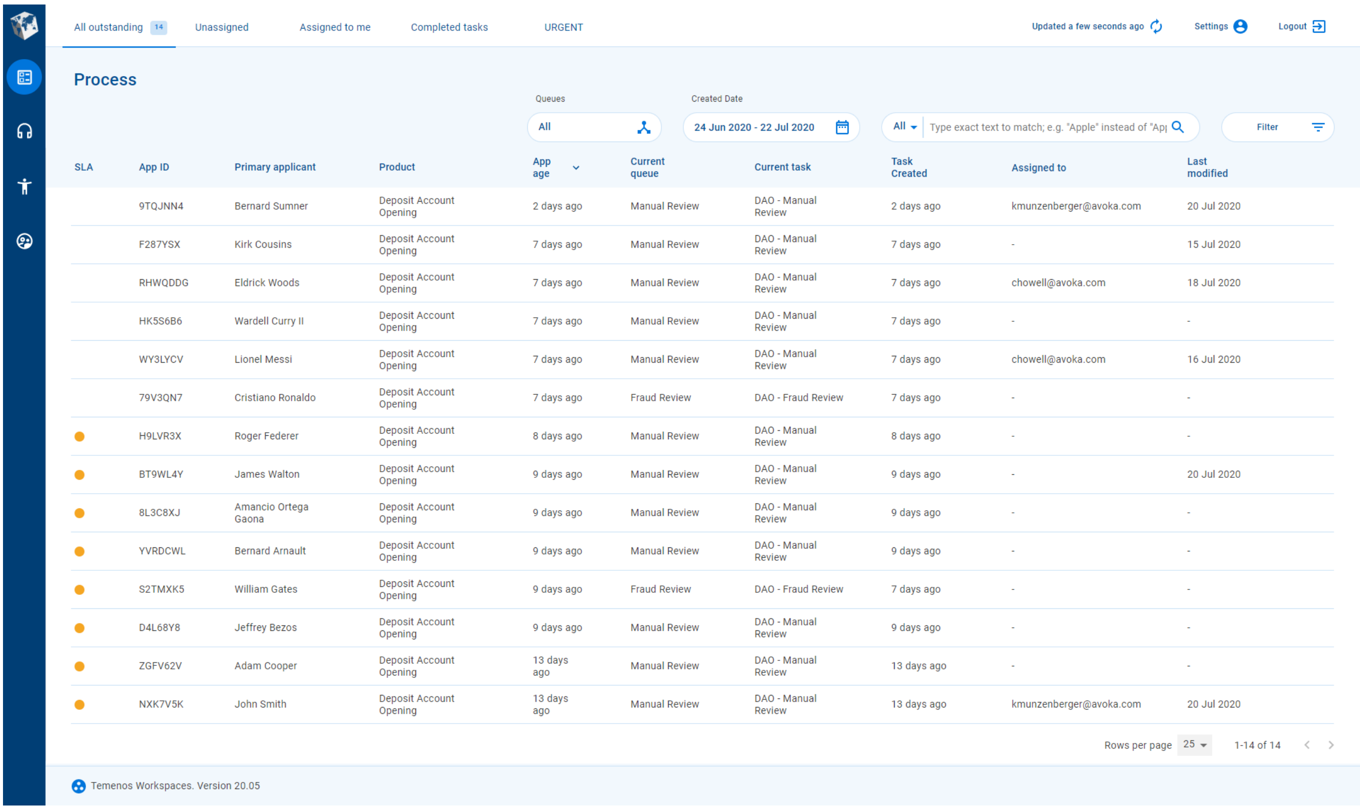
The List screen in the Review space includes all of the standard features of a WorkspacesList screen.

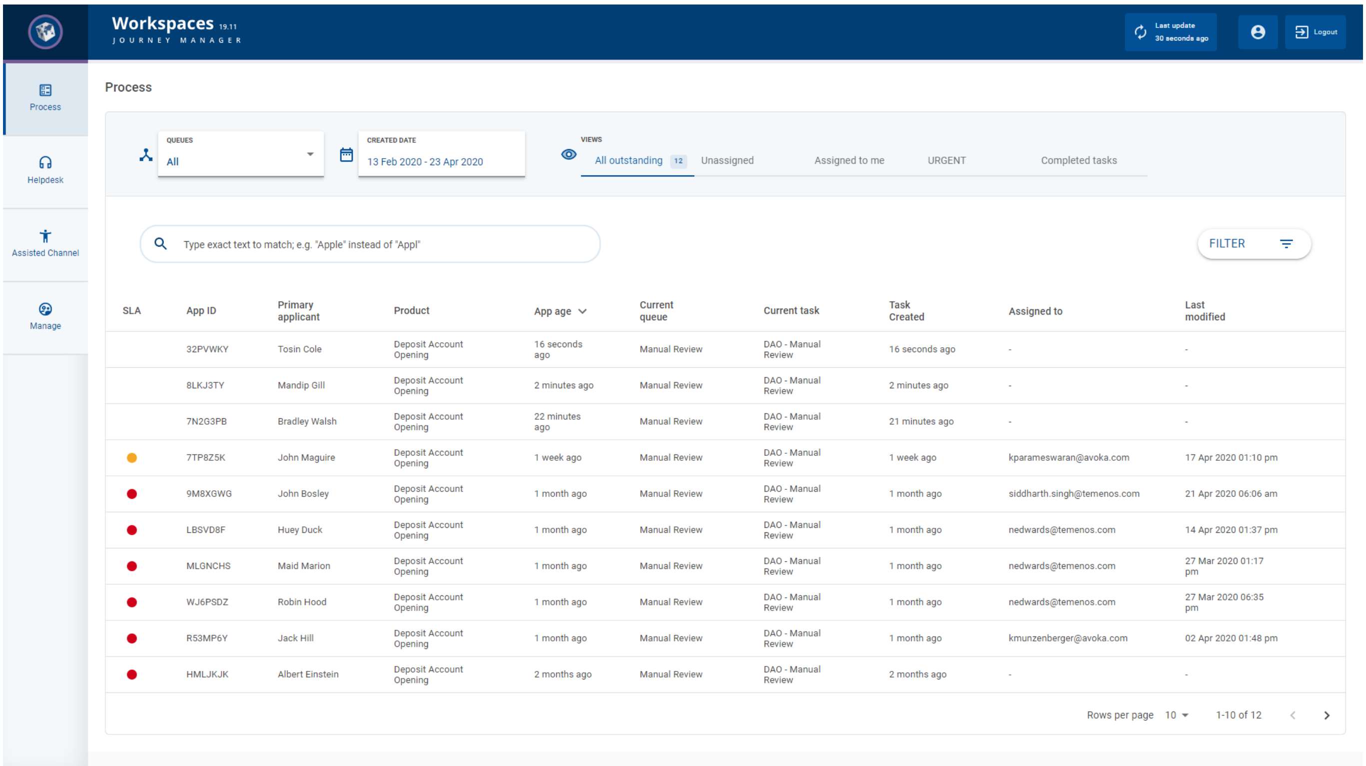
- An item list populated with tasks sourced from the active queue.
- Support for optional item list expansion rows presenting additional content. 23.04This feature was introduced in the 23.04 release
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. 19.11This feature was introduced in the 19.11 release
- 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.

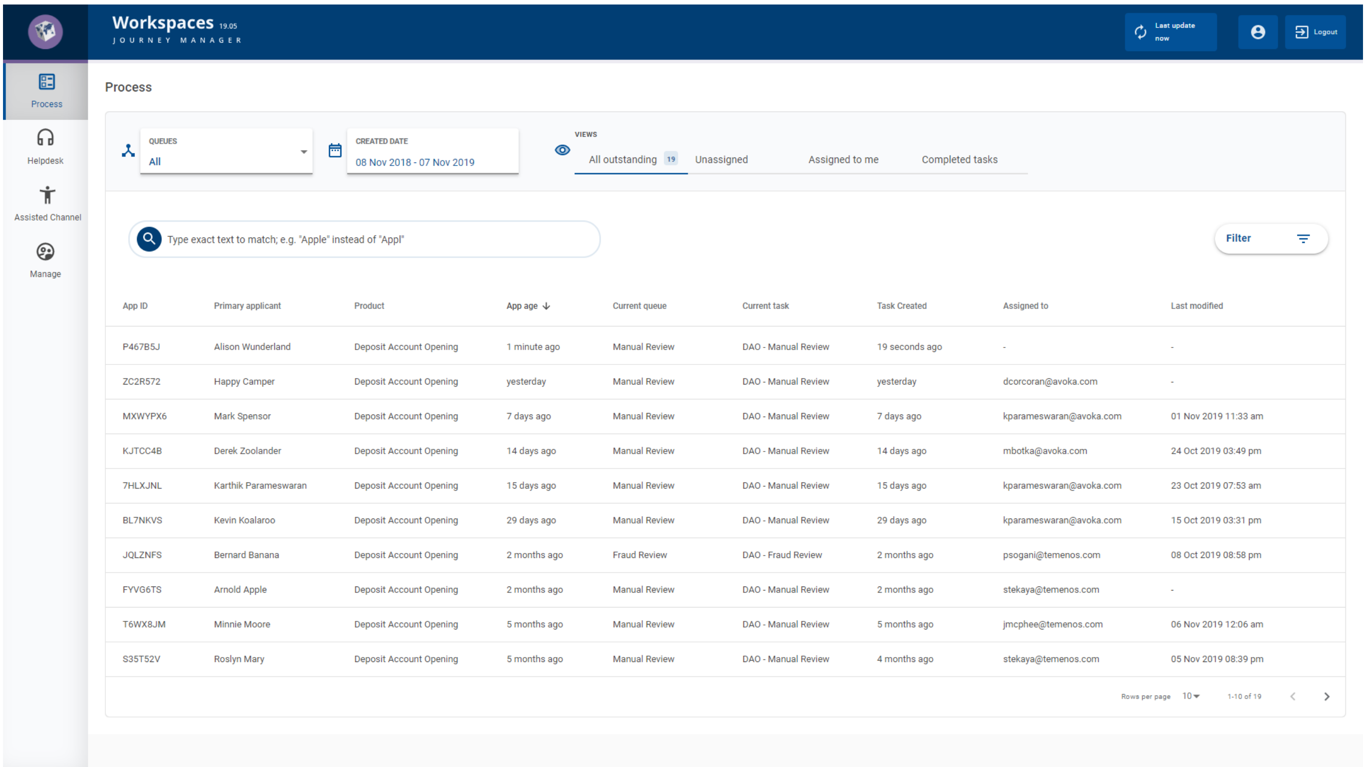
- A Created Date global filter that restricts the tasks in the item list based on the date they were created.
- Flexible search, filter and sort options that you can use to refine the set of tasks in the item list.
- A Bulk Action mode switch to change between acting on a single task or multiple tasks. 22.10This feature was introduced in the 22.10 release
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- 23.04 and later
- 20.05 to 22.10
- 19.11
- 19.05 and earlier




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


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




The List screen in the Review space displays a list of tasks from the selected queue, taking into consideration the current view and any active search, filter and sort options. Each row in the item list shows information for a single task in columns including an SLA indicator that identifies how application processing is progressing against the terms of your SLA. Rows can be expanded to show additional details. 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. To learn more about the item list, see Understanding the Workspaces List screen > Item list.

The items displayed satisfy global filter requirements imposed by the Created Date filter, and can be further refined using other search, filter and sort options. Searching and filtering restrict which tasks are displayed in the item list, while sorting determines the order that items appear in the list. To learn more about these options, see Search for a task or application, 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 Actions below.

## Details Screen

The Details screen in the Review space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about an application and a selected task, and provides access to actions for processing applications. Each of the following features is contained in a separate container (pane, card or section).

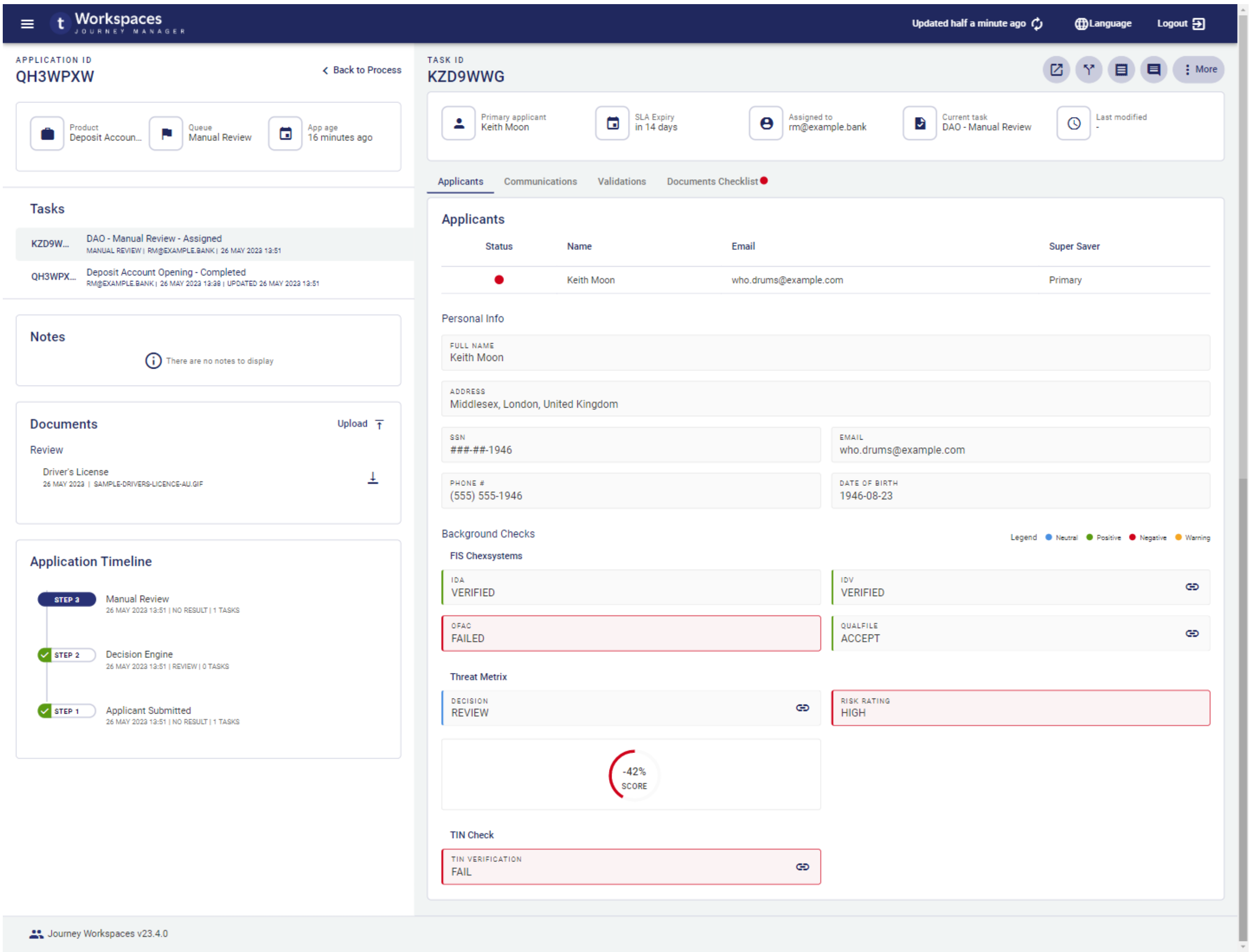
- Separate panes for application and task content. 23.04This feature was introduced in the 23.04 release
- Separate key information cards for the application and the selected task. 23.04This feature was introduced in the 23.04 release
- The ability to track application progress against an SLA.
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane. 23.04This feature was introduced in the 23.04 release
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff. 23.04This feature was introduced in the 23.04 release
- A collection of documents used during application processing to verify applicant details.
- An application timeline showing the steps (tasks) that the application has progressed through. 23.04This feature was updated in the 23.04 release
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform in the Review space at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - 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.
- A Communications tab listing emails sent to the applicant with options to view and resend.
- Options to view the details of background checks in various formats including JSON, XML, HTML, or PDF.
- A checklist of documents that need to be uploaded, as well as an upload status for each document.

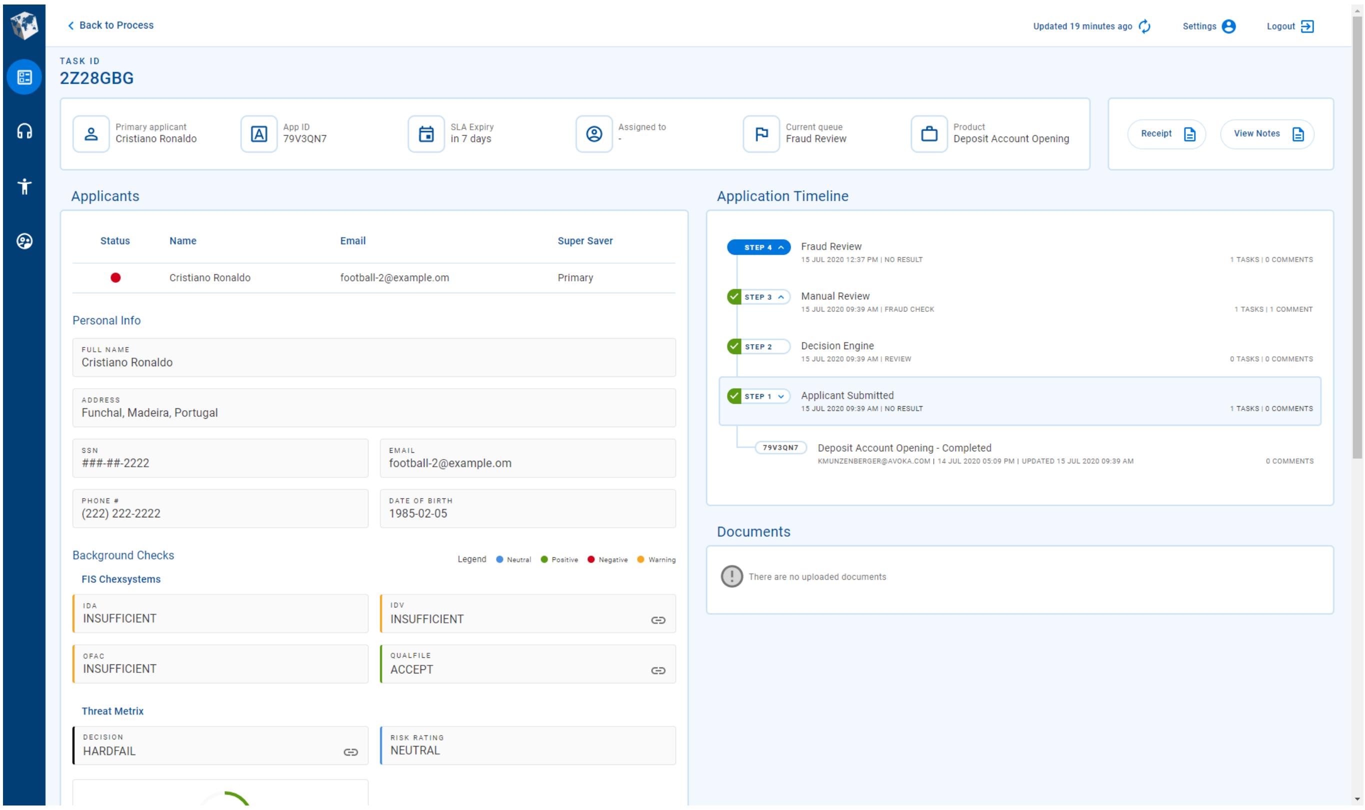
To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.

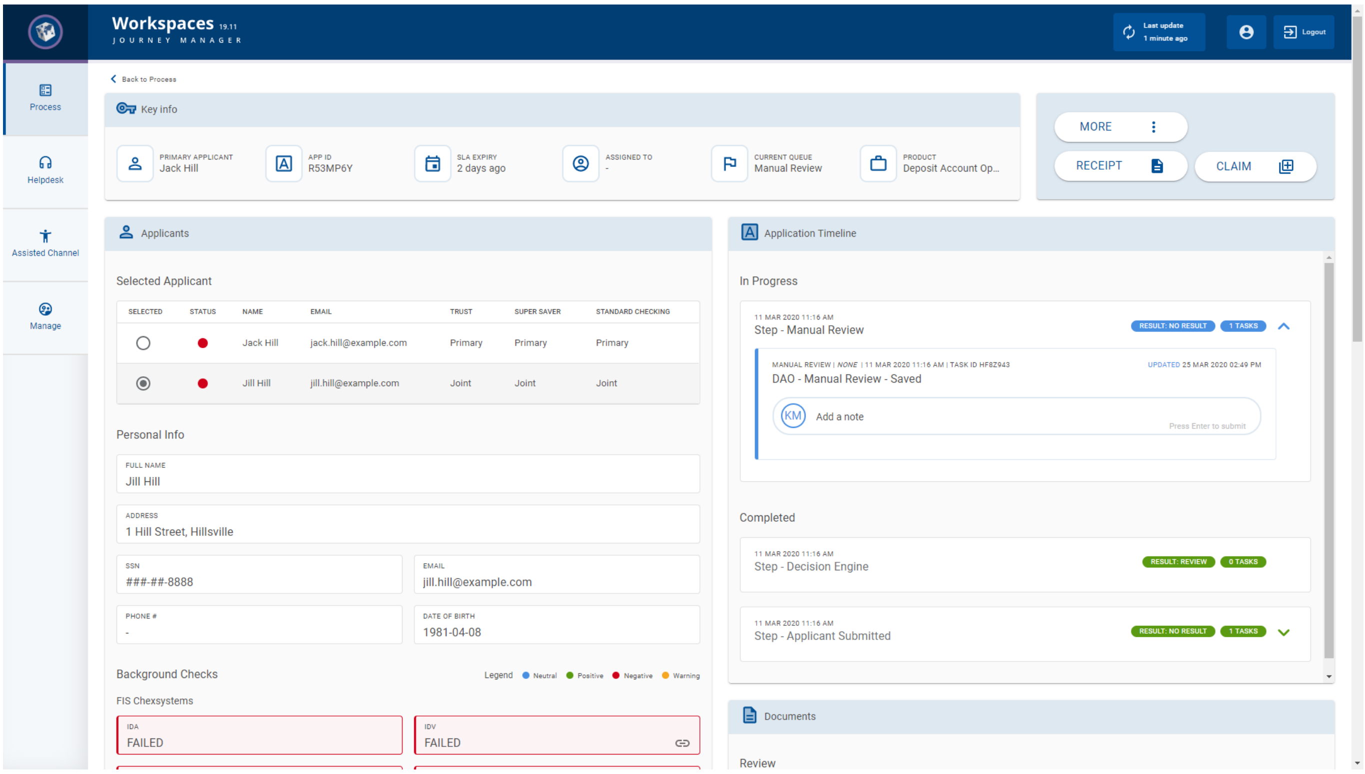
NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

- 23.04 and later
- 20.05 to 21.10
- 19.11 and earlier







# Actions

The process actions are:

- **Add Notes**: Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **Claim**: Assign a task to yourself.
- **Decision**: Take a decision that progresses a task along its application journey.
- **Receipt**: See a read-only view of a submitted application.
- **Release**: Remove a task assignment for a task assigned to you.
- **Share**: Obtain a URL for a Details screen relating to a specific application, task and space. 23.10This feature was introduced in the 23.10 release
- **View Notes**: View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release

The Claim, Release, and Decision actions are described below in the context of the 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 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 modal window, update the Decision and Note as required, and then click Submit to record the decision you have made.

To learn more about the Decision action, see Decision: Record a decision for a task.

## 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

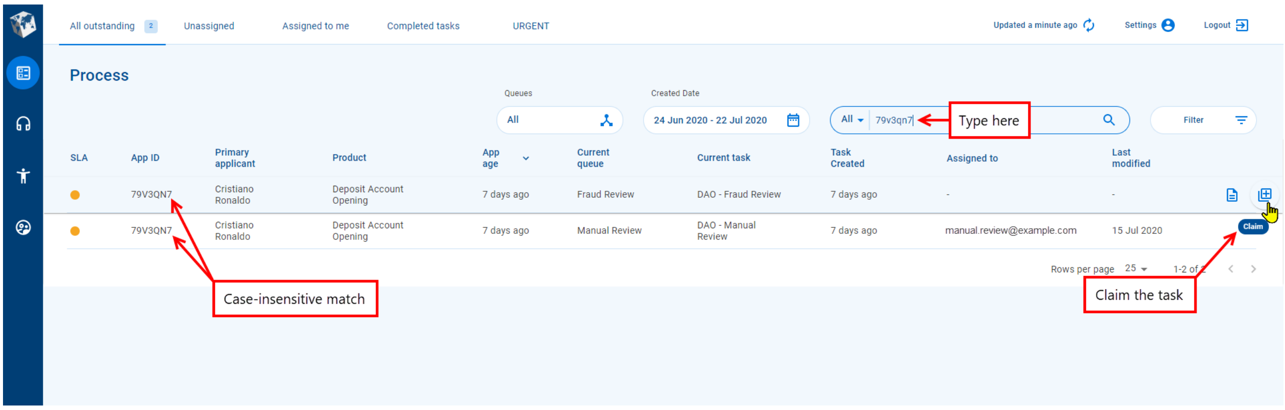
Step-by-step examples are also available for other actions that you may find useful while processing applications.

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen 23.04This feature was removed in the 23.04 release
- Upload a document on the Details screen
- Ask an applicant to upload required documents on the Details screen

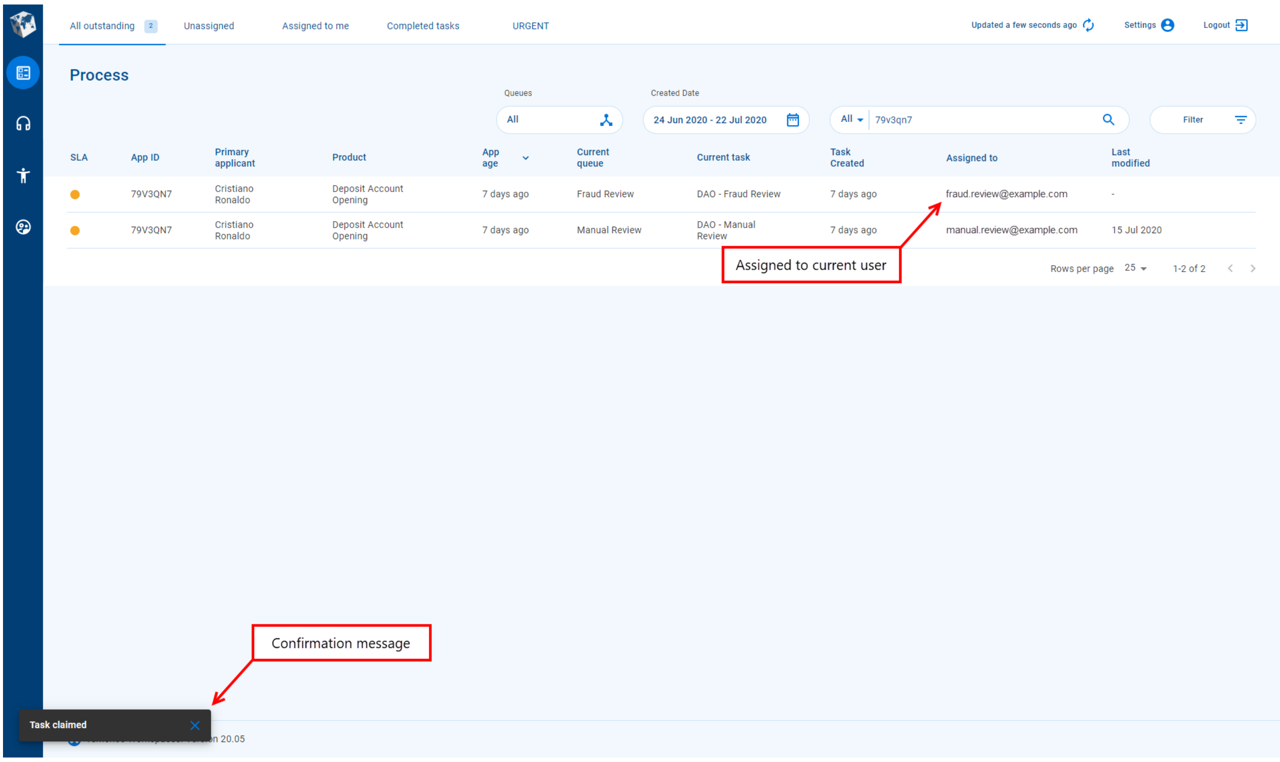
### Claim a Task

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 Review space. The List screen is displayed.
2. Click in the searchSearch 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 library_addClaim to assign the task to yourself. The A message confirming you have claimed the task is displayed briefly in the bottom-left corner of the screen.

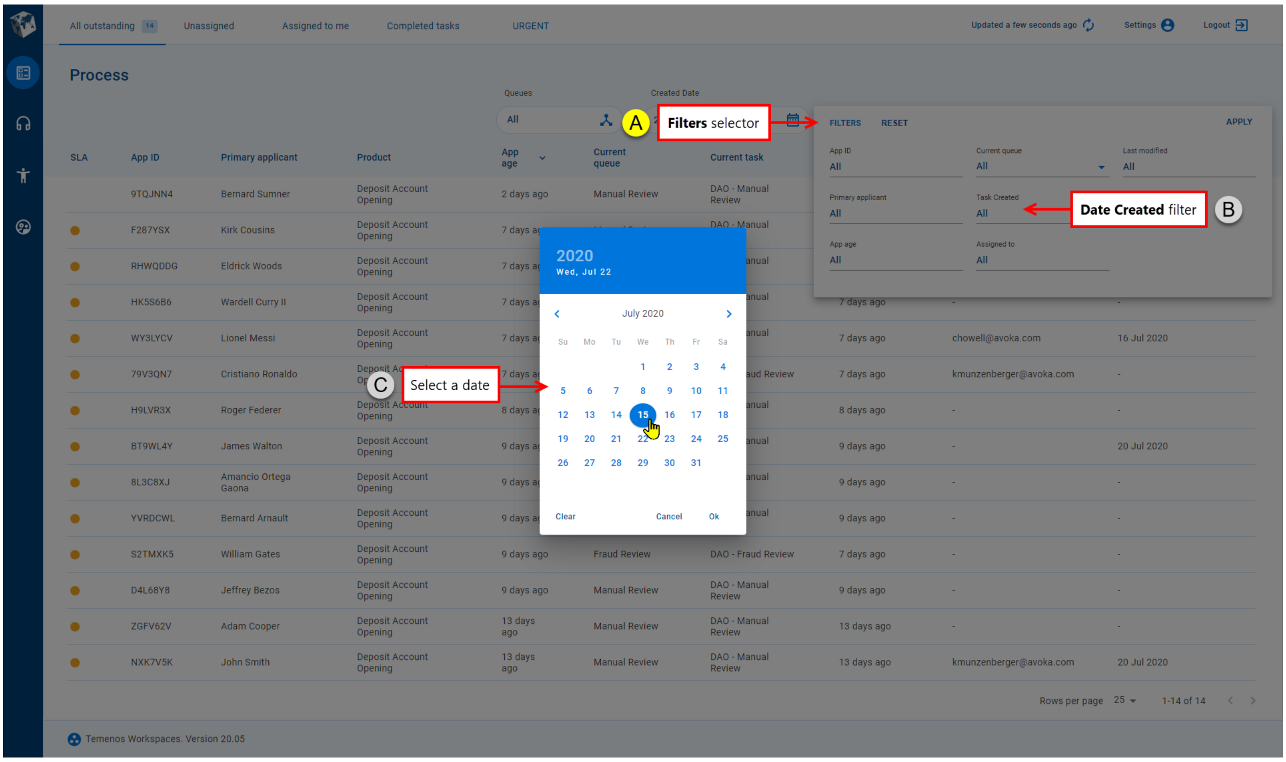



Alternatively, you can click the task to display its application details and then click the Claim button on the Details screen.

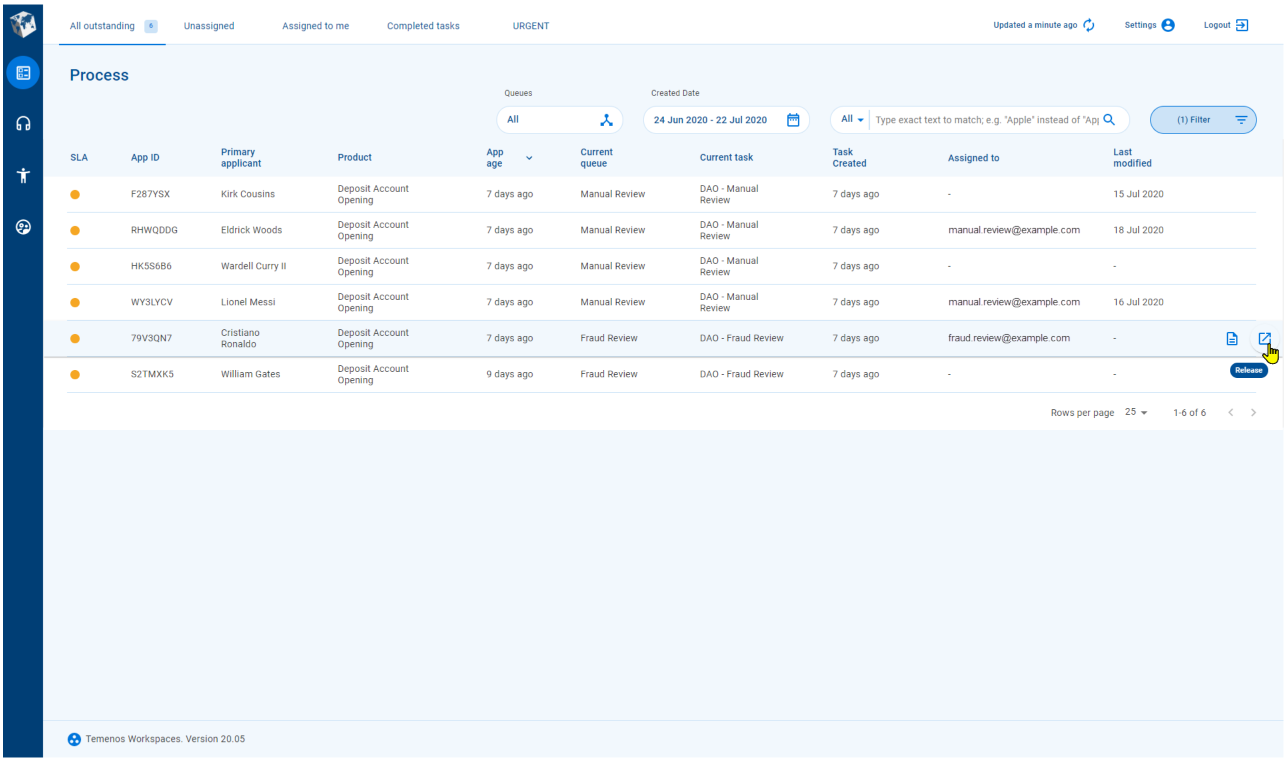
## Release a Task

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 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 open_in_newRelease 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.



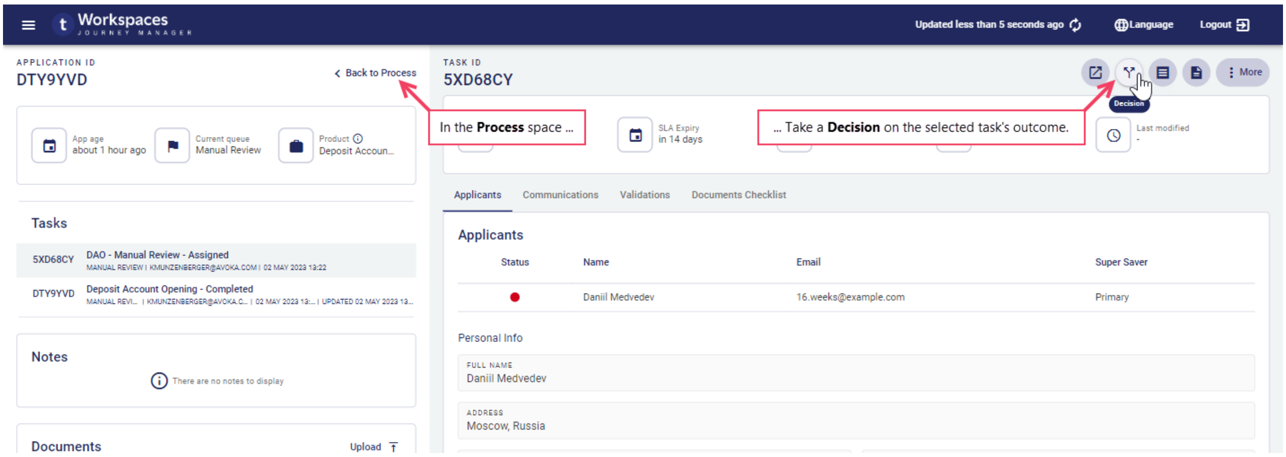

Alternatively, you can click the task to display its details, then click Release on the Details screen.

## Approve an Application

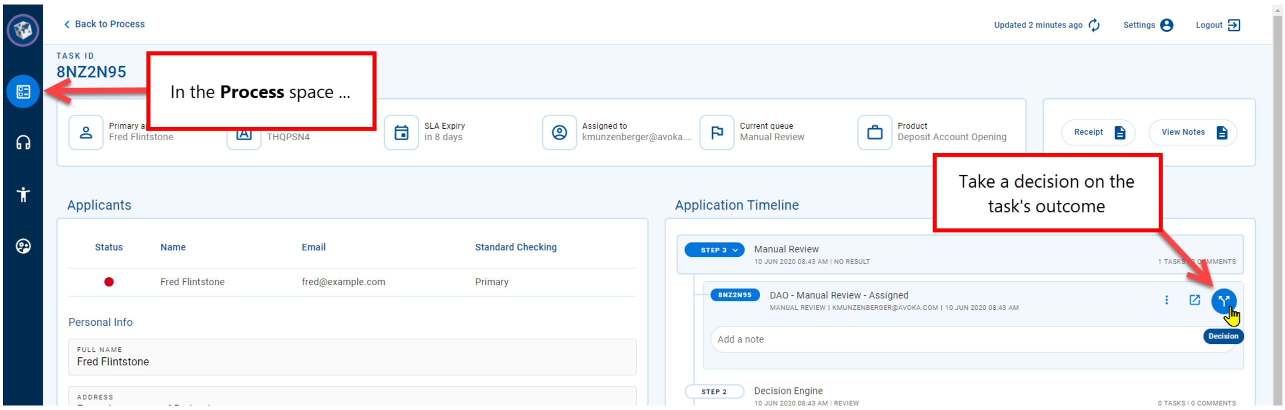
This example shows you how to take a decision about a task assigned to you so that the associated application progresses in its life cycle. In this example, we'll kick off the process to send an application for a fraud check then save without submitting so that we can go and find some information we 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 call_splitDecision to display the Decision window.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

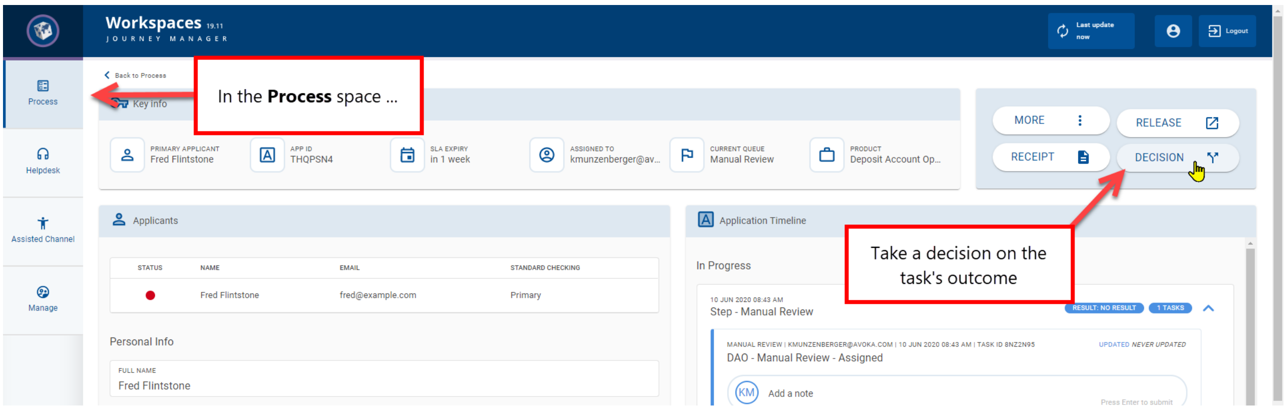
   call_splitDecision is located in the Actions group.



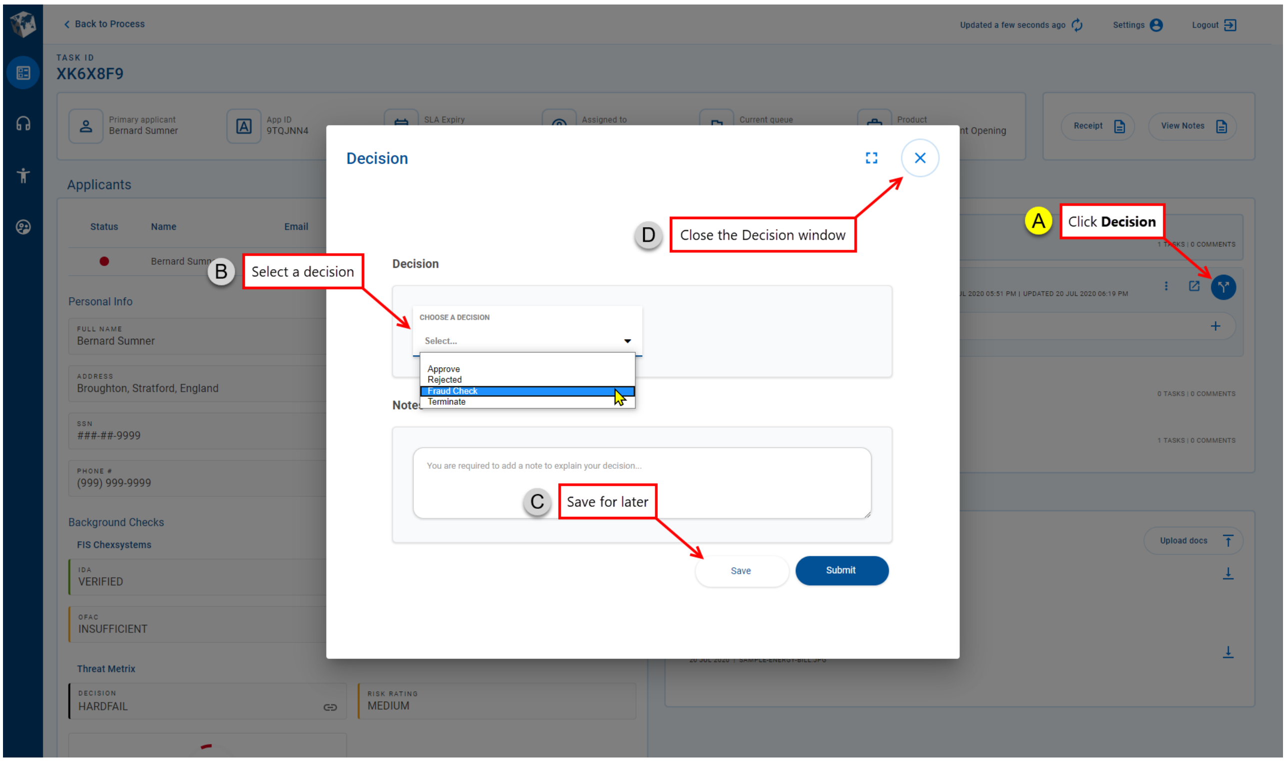

call_splitDecision is located within the selected task in the application timeline.



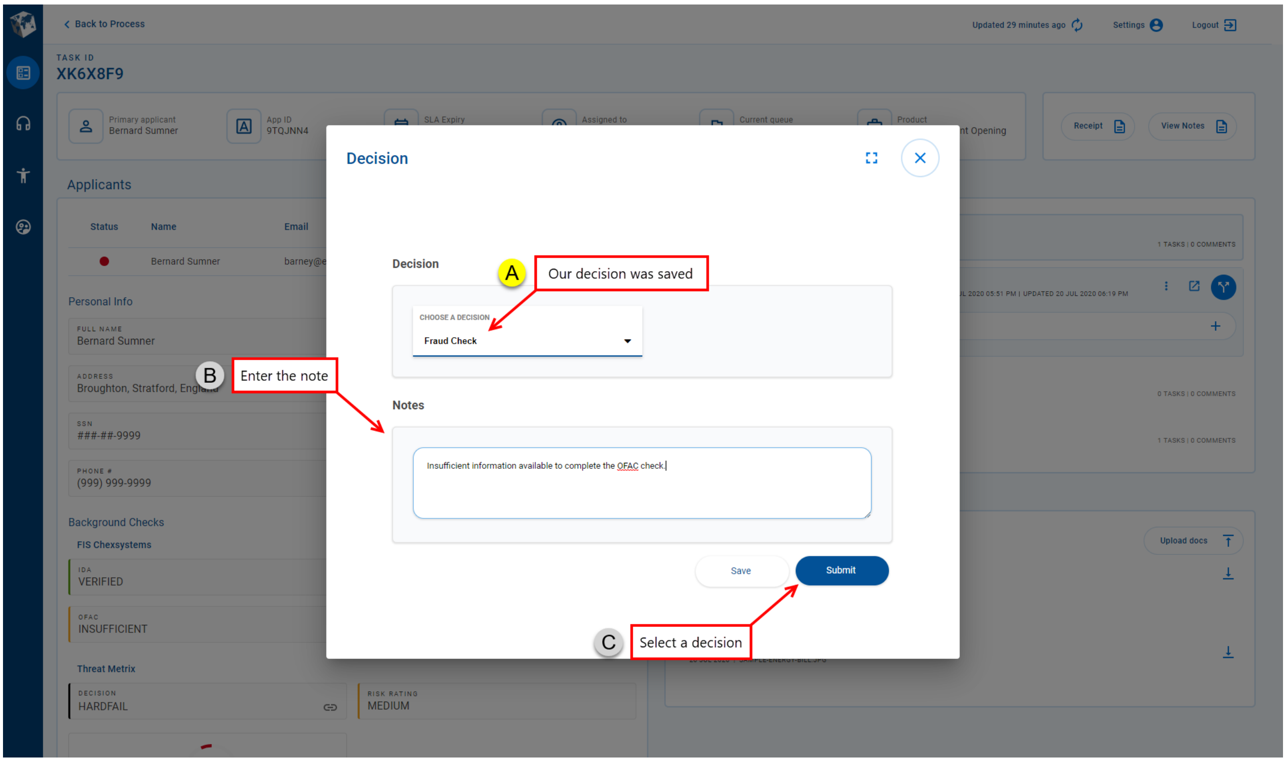

The Decision button is located in the Action panel.




3. Notice that the Choose a Decision box is empty. Select an option in the Choose a Decision list 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, click Decision to display the Decision window again. Notice that the Choose a Decision box 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 List screen where the task may not be available because it may no longer satisfy the active search or filter criteria; for example, it may be on a different queue.

# Request information during application review

NOTE

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

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, complete with a List screen and a Details screen configured with features designed to make application processing fast and efficient. This space is part of an application flow that demonstrates how an application can be transferred back to the applicant for their further action. In this space, bank staff can monitor the progress of each application sent back to the applicant when documents required for application processing are missing.

The Document Requests space works in conjunction with the Review space, providing a mechanism for interaction between applicants and reviewers; in particular, to enable communication between an applicant and bank staff when the applicant needs to upload documents required for application processing.

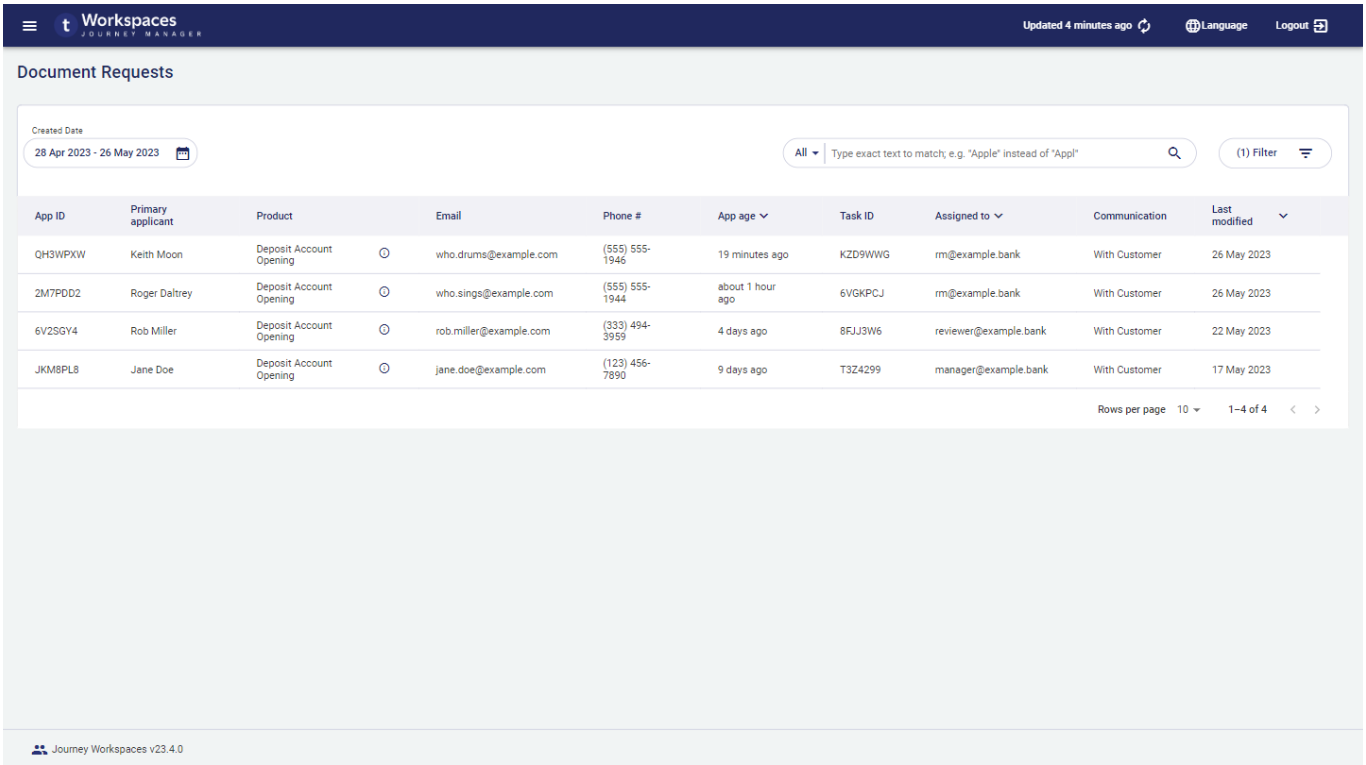
## List Screen

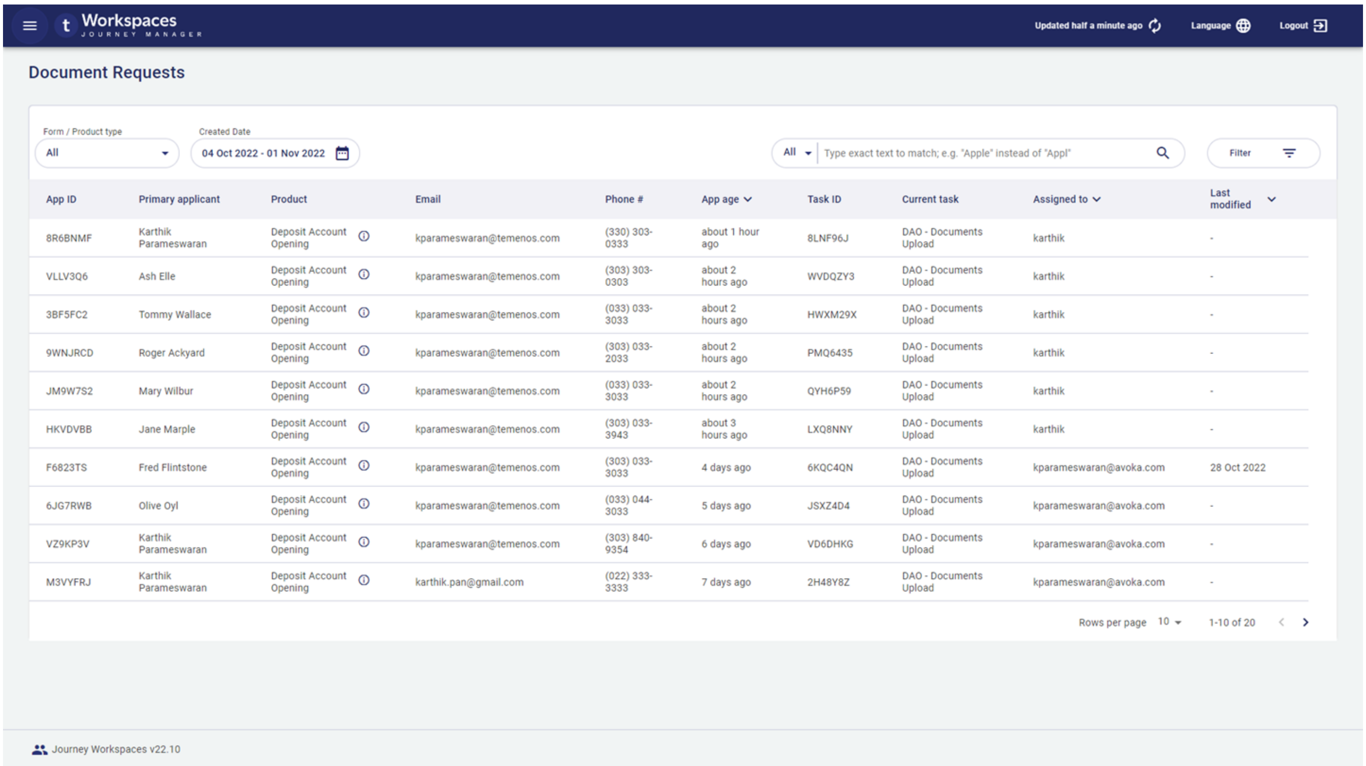
The List screen in the Document Requests space includes all of the standard features of a WorkspacesList screen.

- 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 Created Date global filter 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.

- 23.04 and later
- 22.10






The List screen in the Document Requests space displays a list of applications, taking into consideration any active search, filter and sort options. Each row in the item list shows information for a single task in columns. To learn more about the item list, see Understanding the Workspaces List screen > Item list.

The items displayed satisfy global filter requirements imposed by the Created Date filter, and can be further refined using other search, filter and sort options. Searching and filtering restrict which tasks are displayed in the item list, while sorting determines the order that items appear in the list. To learn more about these options, see Search for a task or application, 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 Actions below.

## Details Screen

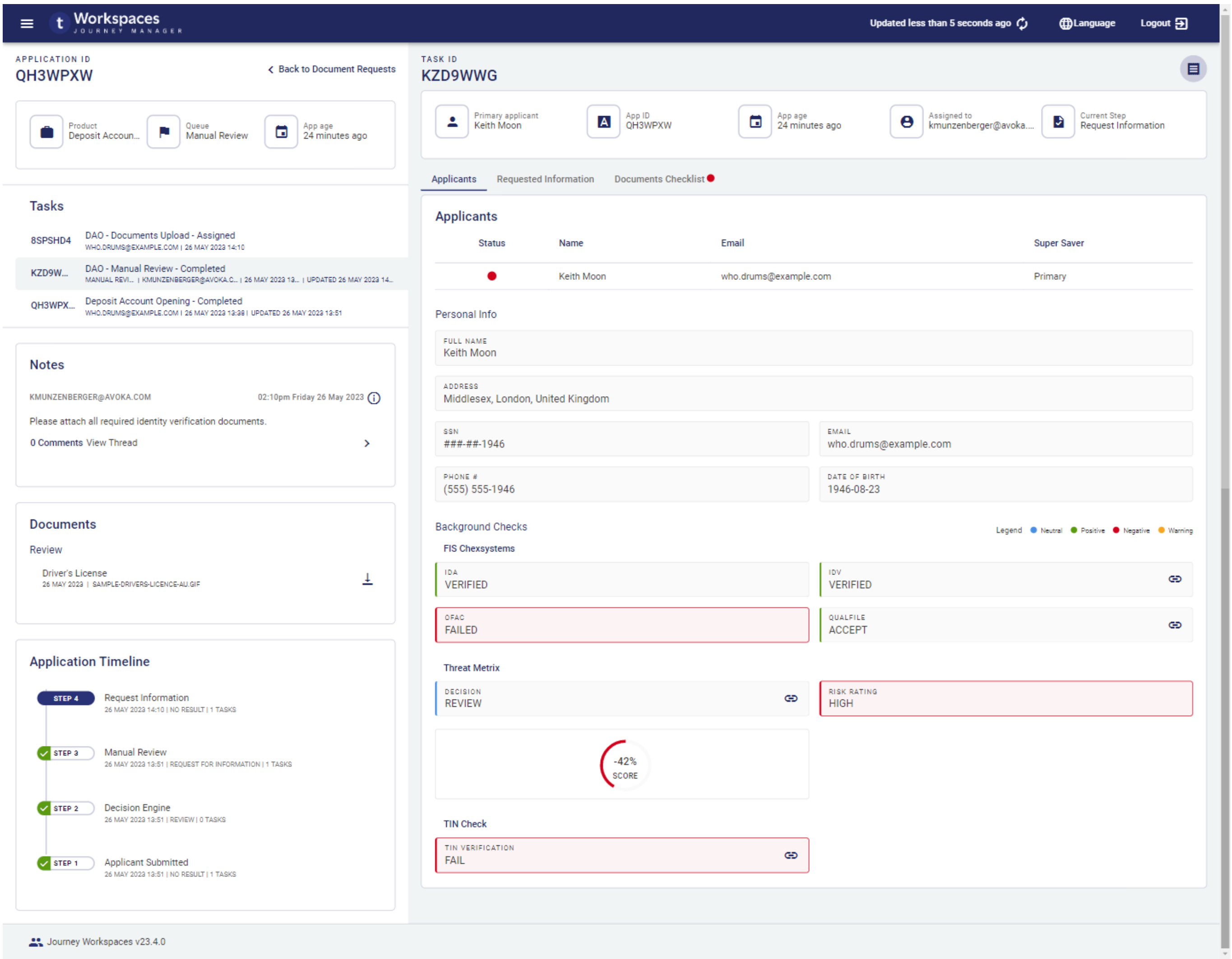
The Details screen in the Document Requests space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about an application and a selected task, and provides access to actions for handling document upload requests. Each of the following features is contained in a separate container (pane, card or section).

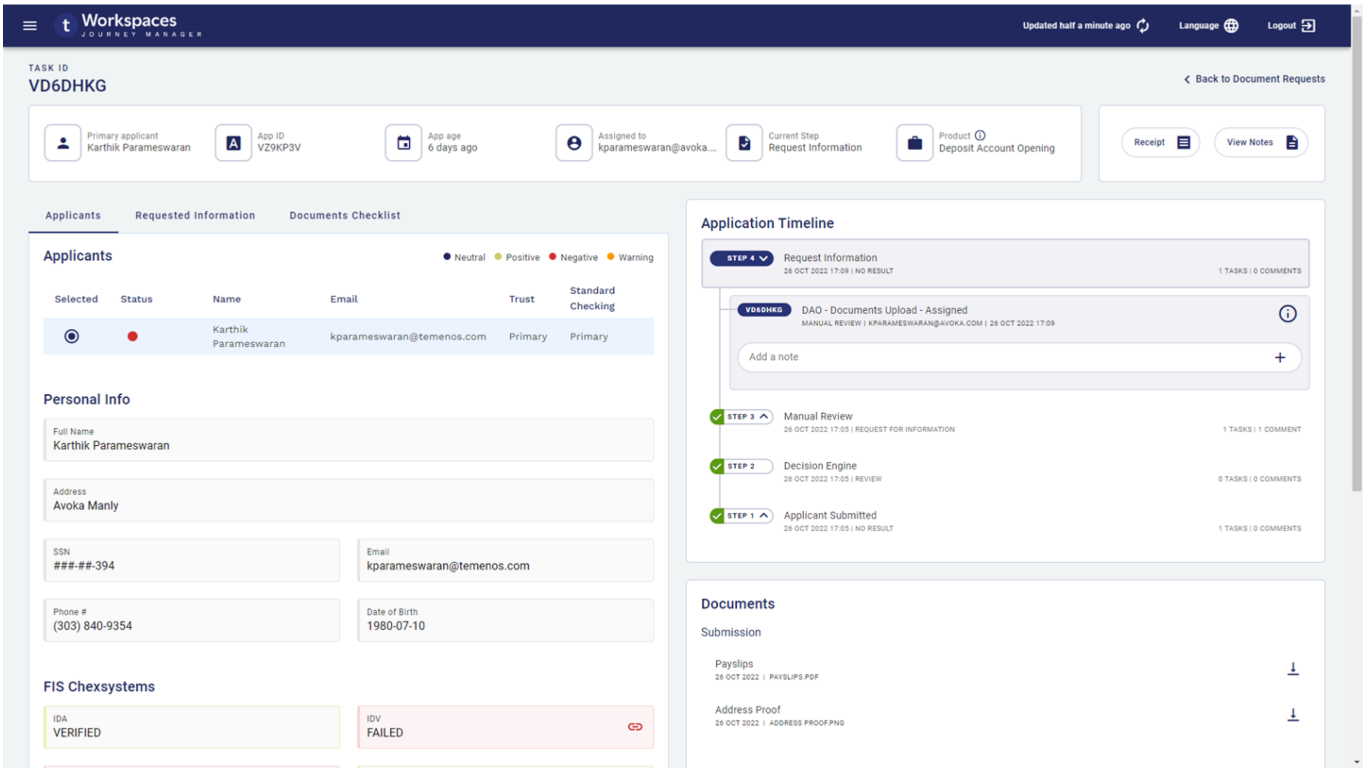
- Separate panes for application and task content.
- Separate key information cards for the application and the selected task.

- The ability to track application progress against an SLA.
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane.
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff.
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through.
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
    - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
    - 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.
- A Communications tab listing emails sent to the applicant with options to view and resend.
- Options to view the details of background checks in various formats including JSON, XML, HTML, or PDF.
- A checklist of documents that need to be uploaded, as well as an upload status for each document.

To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.

- 23.04 and later
- 21.10


Workspaces
JOURNEY MANAGER
Updated less than 5 seconds ago
Language
Logout
APPLICATION ID
QH3WPXW
Back to Document Requests
Product
Deposit Accoun...
Queue
Manual Review
App age
24 minutes ago
Tasks
8SPSHD4
DAO - Documents Upload - Assigned
KZD9W...
DAO - Manual Review - Completed
QH3WPX...
Deposit Account Opening - Completed
Notes
KMUNZENBERGER@AVOKA.COM
02:10pm Friday 26 May 2023
Please attach all required identity verification documents.
0 Comments View Thread
Documents
Review
Driver's License
Application Timeline
STEP 4
Request Information
STEP 3
Manual Review
STEP 2
Decision Engine
STEP 1
Applicant Submitted
TASK ID
KZD9WWG
Primary applicant
Keith Moon
App ID
QH3WPXW
App age
24 minutes ago
Assigned to
kmunzenberger@avoka...
Current Step
Request Information
Applicants
Requested Information
Documents Checklist
Applicants
Status
Name
Email
Super Saver
Keith Moon
who.drums@example.com
Primary
Personal Info
FULL NAME
Keith Moon
ADDRESS
Middlesex, London, United Kingdom
SSN
###-##-1946
EMAIL
who.drums@example.com
PHONE #
(555) 555-1946
DATE OF BIRTH
1946-08-23
Background Checks
Legend
Neutral
Positive
Negative
Warning
FIS Chexsystems
IDA
VERIFIED
IDV
VERIFIED
OFAC
FAILED
QUALFILE
ACCEPT
Threat Metrix
DECISION
REVIEW
RISK RATING
HIGH
-42%
SCORE
TIN Check
TIN VERIFICATION
FAIL
Journey Workspaces v23.4.0



## Actions

The actions available in the Document Requests space are:

- **[Add Notes]**: Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **[Decision]**: Take a decision that progresses a task along its application journey.
- **[Receipt]**: See a read-only view of a submitted application.
- **[View Notes]**: View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release

## Action Examples

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

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen 23.04This feature was removed in the 23.04 release

# Received applications

NOTE

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

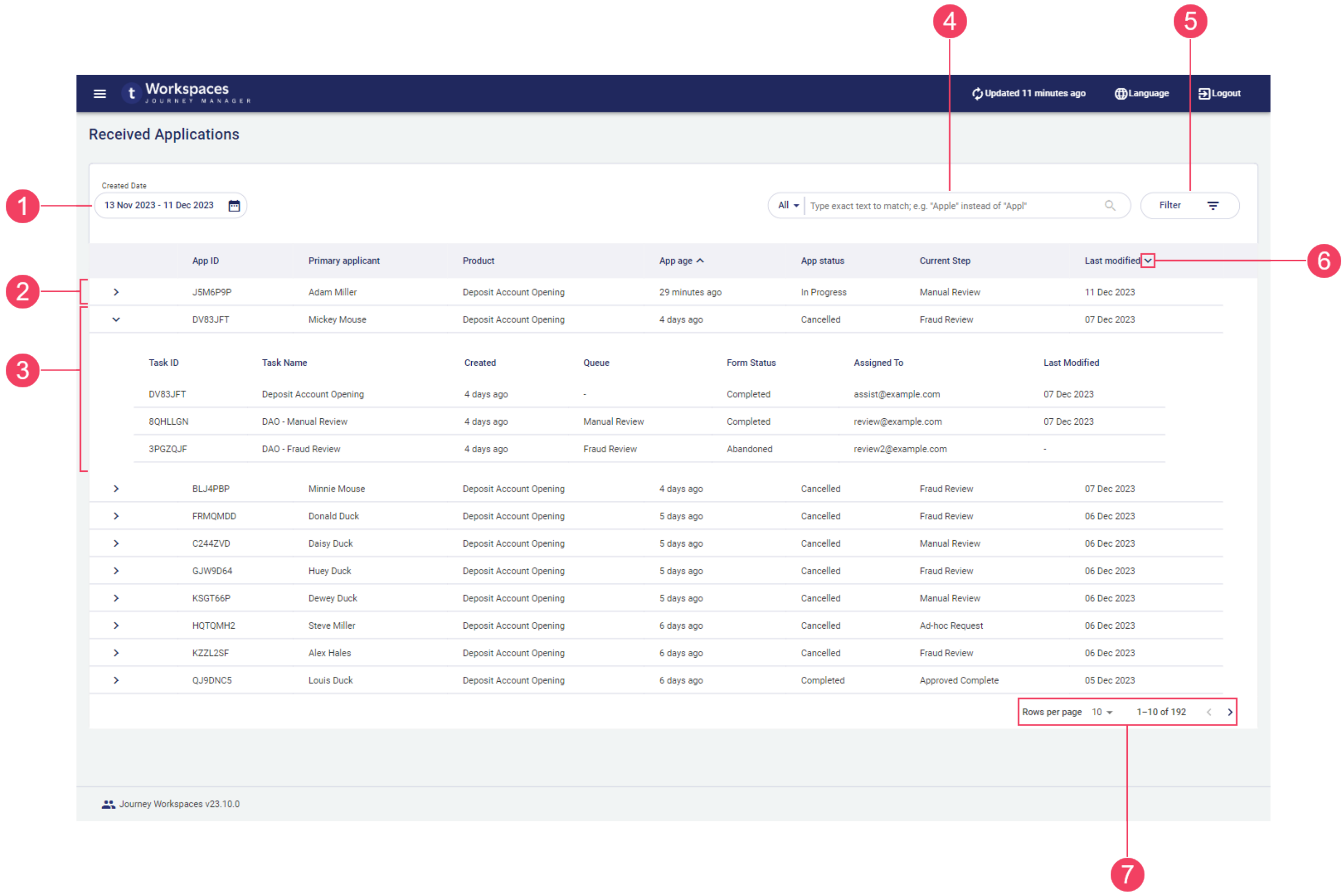
As an application moves through the application life cycle, it becomes available to reviewers on different processing spaces depending on how it's progressing. Once an application has completed processing, it is no longer available to reviewers in any of the standard processing spaces (Review, Document Requests). To fill this gap, the default Workspaces configuration provides a space where reviewers can see all applications: the Received Applications space.

Like other spaces, the Received Applications space comes with a List screen and a Details screen configured with features for finding and viewing applications, including some features not available in other spaces. A key difference between the Received Applications space and other spaces is that the List screen in this space lets you view both applications and tasks at the same time, a feature no other space supports.

## List Screen

The List screen in the Received Applications space includes all of the standard features of a WorkspacesList screen.

- An item list containing a list of applications that can be expanded to see the associated tasks.
- A Created Date global filter that restricts the 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 in the item list.
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.




1. Created Date global filter
2. Collapsed item list row
3. Expanded item listrow
4. Search
5. View Filter
6. Sort
7. Paging tools

The List screen in the Received Applications space displays a list of applications, taking into consideration any active search, filter and sort options. Each row in the item list shows information for a single application in columns. Rows can be expanded to show associated tasks. To learn more about the item list, see Understanding the Workspaces List screen > Item list.

The items displayed satisfy global filter requirements imposed by the Created Date filter, and can be further refined using other search, filter and sort options. Searching and filtering restrict which tasks are displayed in the item list, while sorting determines the order that items appear in the list. To learn more about these options, see Search for a task or application, Filter the item list and Sort the item list.

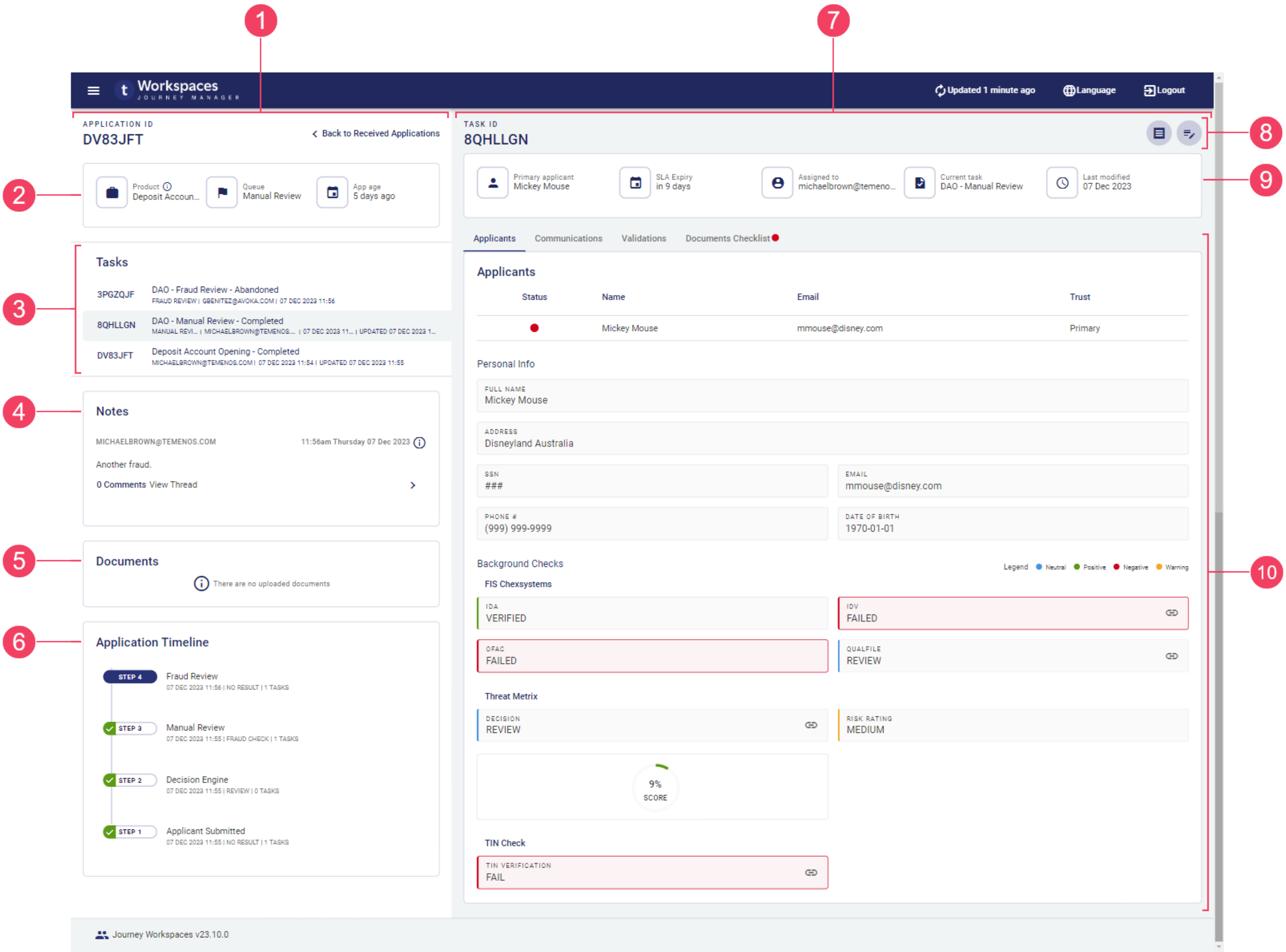
Once you've found the application you're interested in, you can expand it to reveal its associated tasks, and then select one of those tasks to perform an action on it. To learn about the available actions, see Actions below.

## Details Screen

The Details screen in the Received Applications space supports all of the standard features of a Workspaces Details screen. It displays comprehensive information about an application and a selected task, and provides access to actions for viewing application and task information. Each of the following features is contained in a separate container (pane, card or section).

- Separate panes for application and task content.
- Separate key information cards for the application and the selected task.
- The ability to track application progress against an SLA.
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane.
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff.
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through.
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - 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.

To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.



1. Application pane
2. Application key info card
3. Task switcher
4. Notes
5. Documents card
6. Application timeline
7. Task pane
8. Actions group
9. Task key info card
10. Task details tabs

## Actions

The actions available in this space are:

- **Add Notes**: Add notes (and comments) against an application's tasks.
- **Claim**: Assign a task to yourself.

- **Decision**: Take a decision that progresses a task along its application journey.
- **Receipt**: See a read-only view of a submitted application.
- **Release**: Remove a task assignment for a task assigned to you.

The Claim, Release, and Decision actions are described below in the context of the Received Applications space.

### 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 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 modal window, update the Decision and Note as required, and then click Submit to record the decision you have made.

To learn more about the Decision action, see Decision: Record a decision for a task.

# Workspaces Helpdesk

NOTE

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

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.

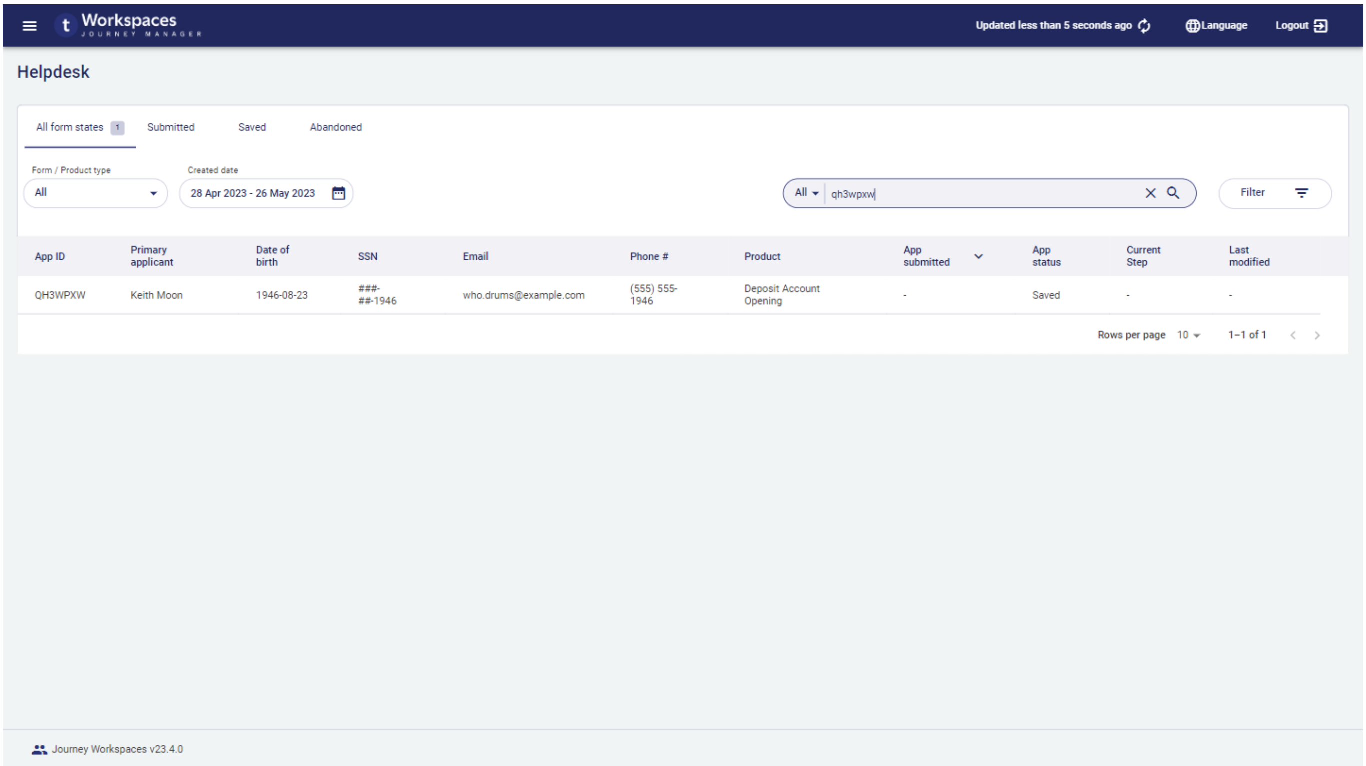
Customer service needs are supported in Workspaces via the inclusion of a Helpdesk space. In its default configuration, the Helpdesk space includes a List screen and a Details screen that are configured with features designed to make activities related to customer service fast and efficient, so that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

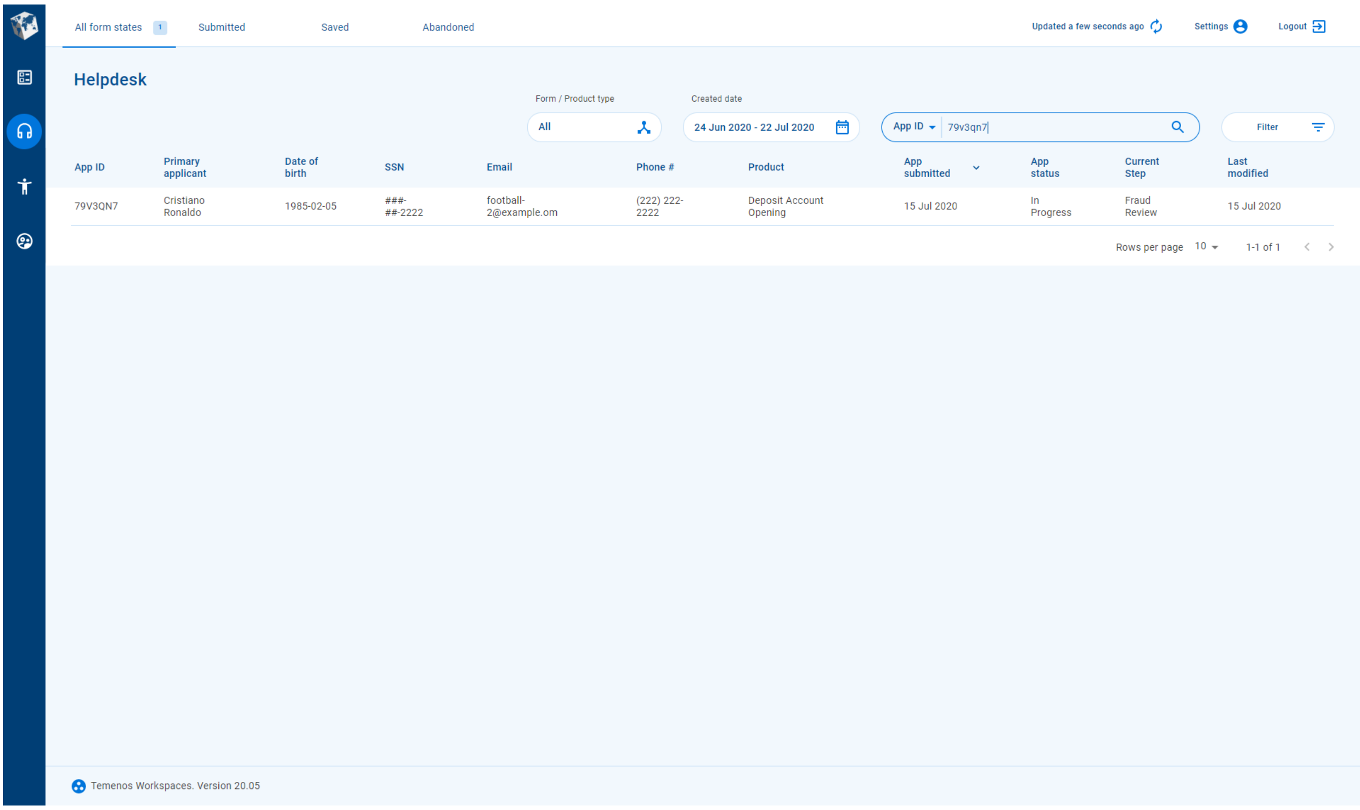
## List Screen

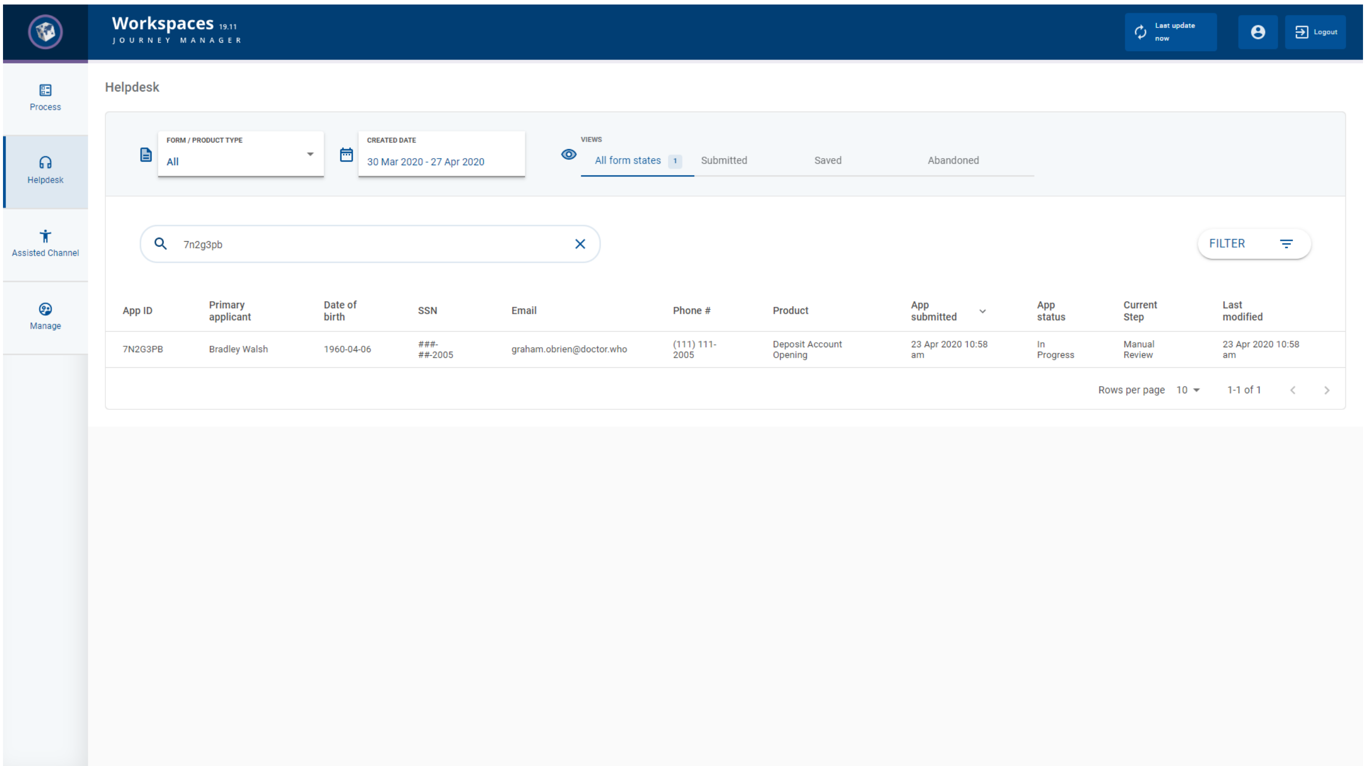
The List screen in the Helpdesk space includes all of the standard features of a WorkspacesList screen.

- 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 Created Date global filter 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.

- 23.04 and later
- 20.05 to 22.10
- 19.11
- 19.05




All form states 1
Submitted
Saved
Abandoned
Updated a few seconds ago
Settings
Logout
Helpdesk
Form / Product type
All
Created date
24 Jun 2020 - 22 Jul 2020
App ID
79v3qn7
Filter
App ID
Primary applicant
Date of birth
SSN
Email
Phone #
Product
App submitted
App status
Current Step
Last modified
79V3QN7
Cristiano Ronaldo
1985-02-05
###-##-2222
football-2@example.om
(222) 222-2222
Deposit Account Opening
15 Jul 2020
In Progress
Fraud Review
15 Jul 2020
Rows per page 10
1-1 of 1
Temenos Workspaces. Version 20.05


Workspaces 19.11
JOURNEY MANAGER
Last update now
Logout
Process
Helpdesk
Assisted Channel
Manage
Helpdesk
FORM / PRODUCT TYPE
All
CREATED DATE
30 Mar 2020 - 27 Apr 2020
VIEWS
All form states 1
Submitted
Saved
Abandoned
7n2g3pb
FILTER
App ID
Primary applicant
Date of birth
SSN
Email
Phone #
Product
App submitted
App status
Current Step
Last modified
7N2G3PB
Bradley Walsh
1960-04-06
###-##-2005
graham.obrien@doctor.who
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Deposit Account Opening
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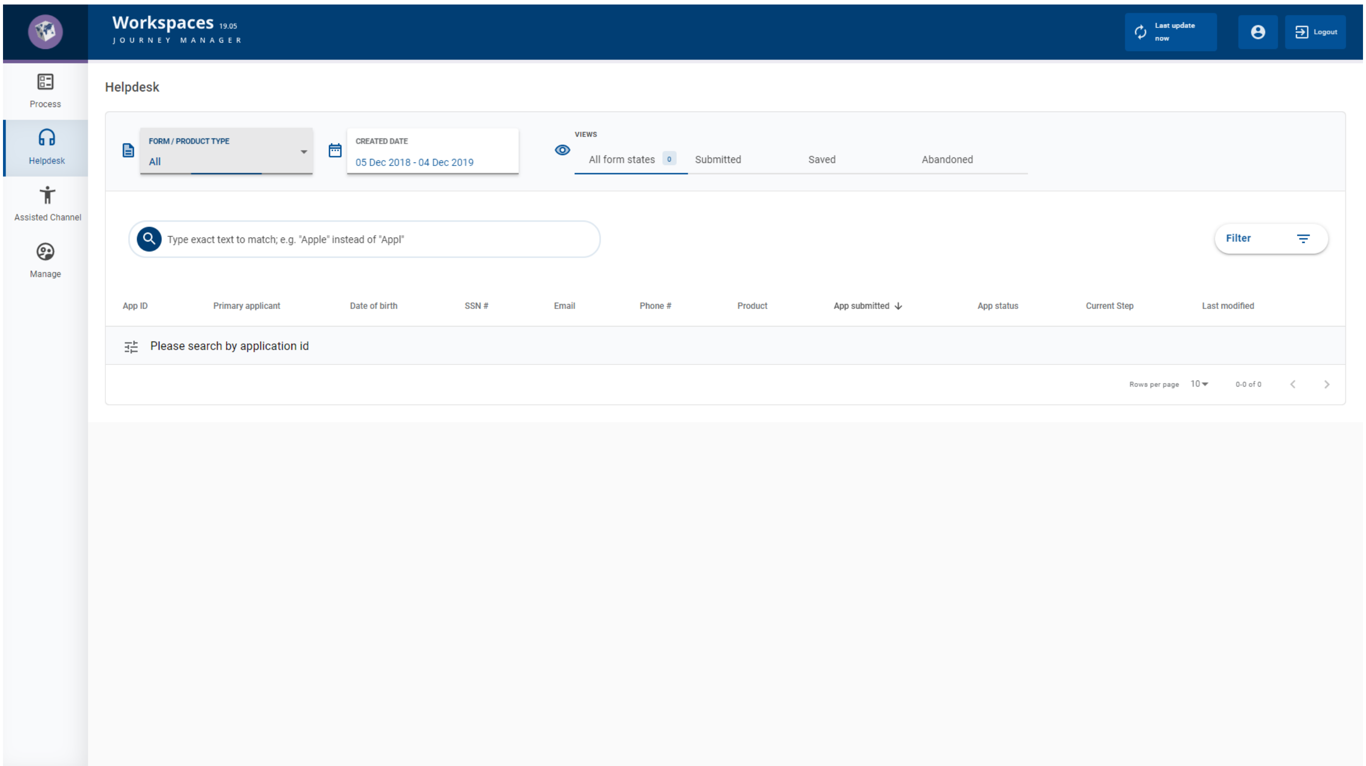
In Progress
Manual Review
23 Apr 2020 10:58 am
Rows per page 10
1-1 of 1




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 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 an application and a selected task, and provides access to the Helpdesk actions. Each of the following features is contained in a separate container (pane, card or section).

- Separate panes for application and task content. 23.04This feature was introduced in the 23.04 release

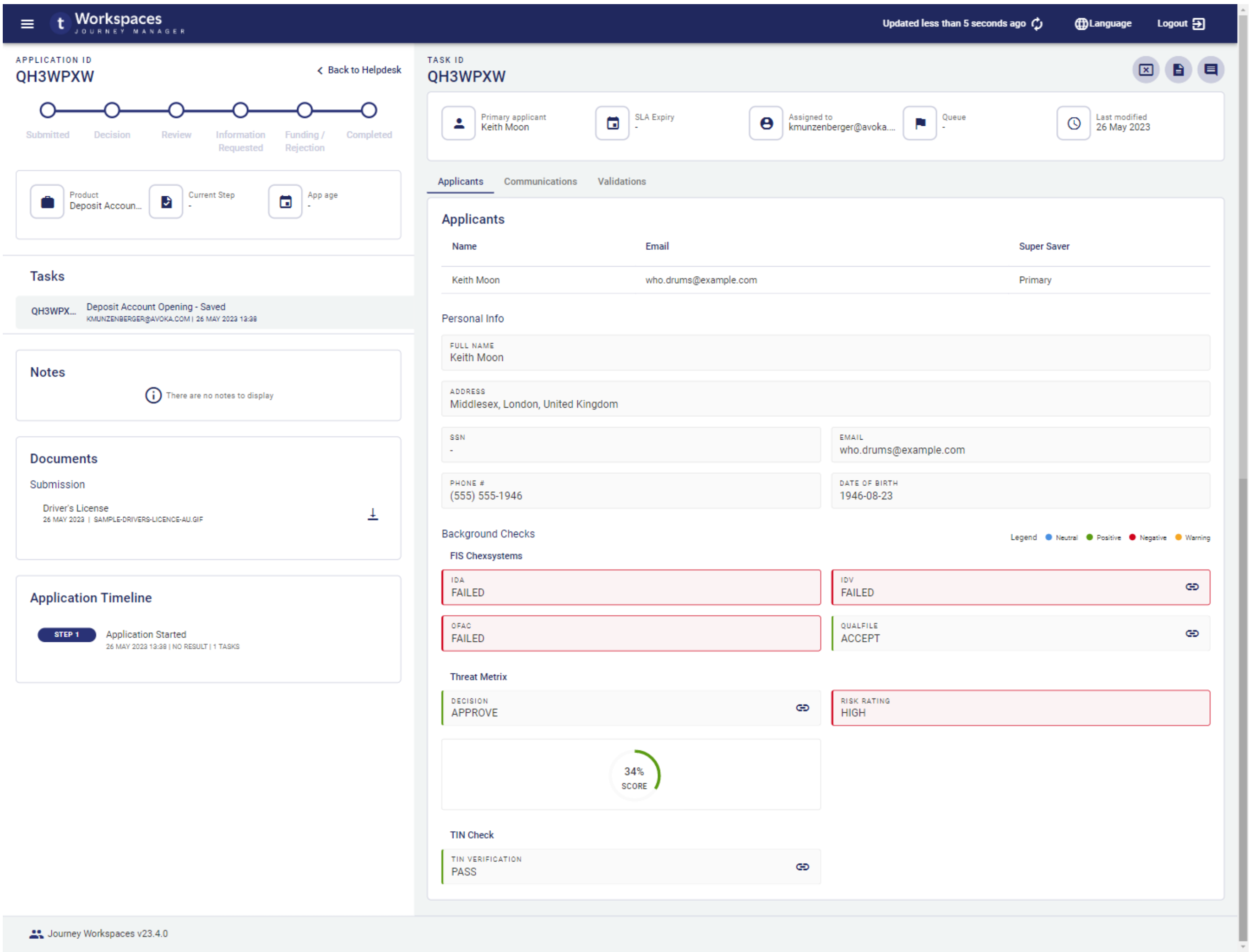
- Separate key information cards for the application and the selected task. 23.04This feature was introduced in the 23.04 release
- The ability to track application progress against an SLA.
- A progress stepper showing a high-level indication of the application's progress. 23.04This feature was updated in the 23.04 release
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane. 23.04This feature was introduced in the 23.04 release
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff. 23.04This feature was introduced in the 23.04 release
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through. 23.04This feature was updated in the 23.04 release
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform in the Helpdesk space at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - 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.
- A Communications tab listing emails sent to the applicant with options to view and resend.
- Options to view the details of background checks in various formats including JSON, XML, HTML, or PDF.
- A checklist of documents that need to be uploaded, as well as an upload status for each document.

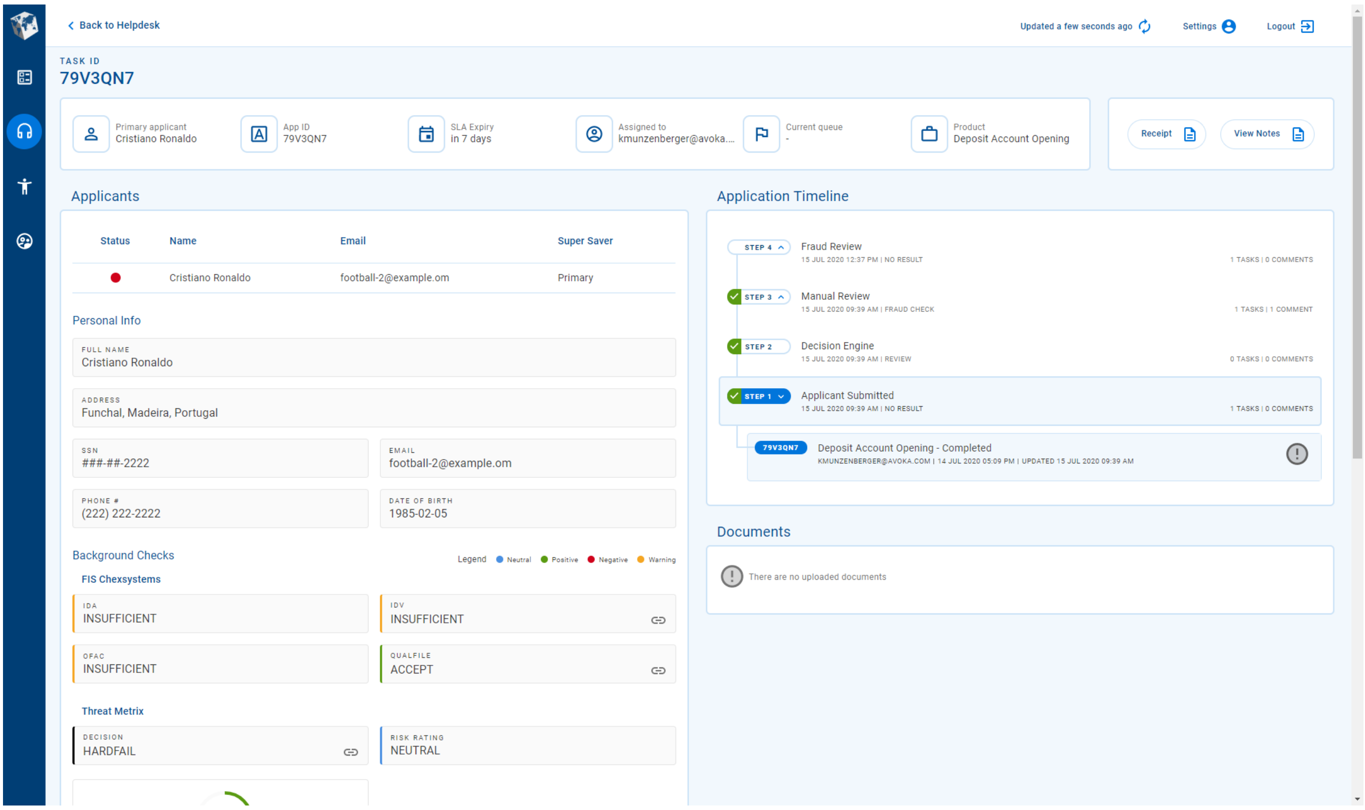
To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.

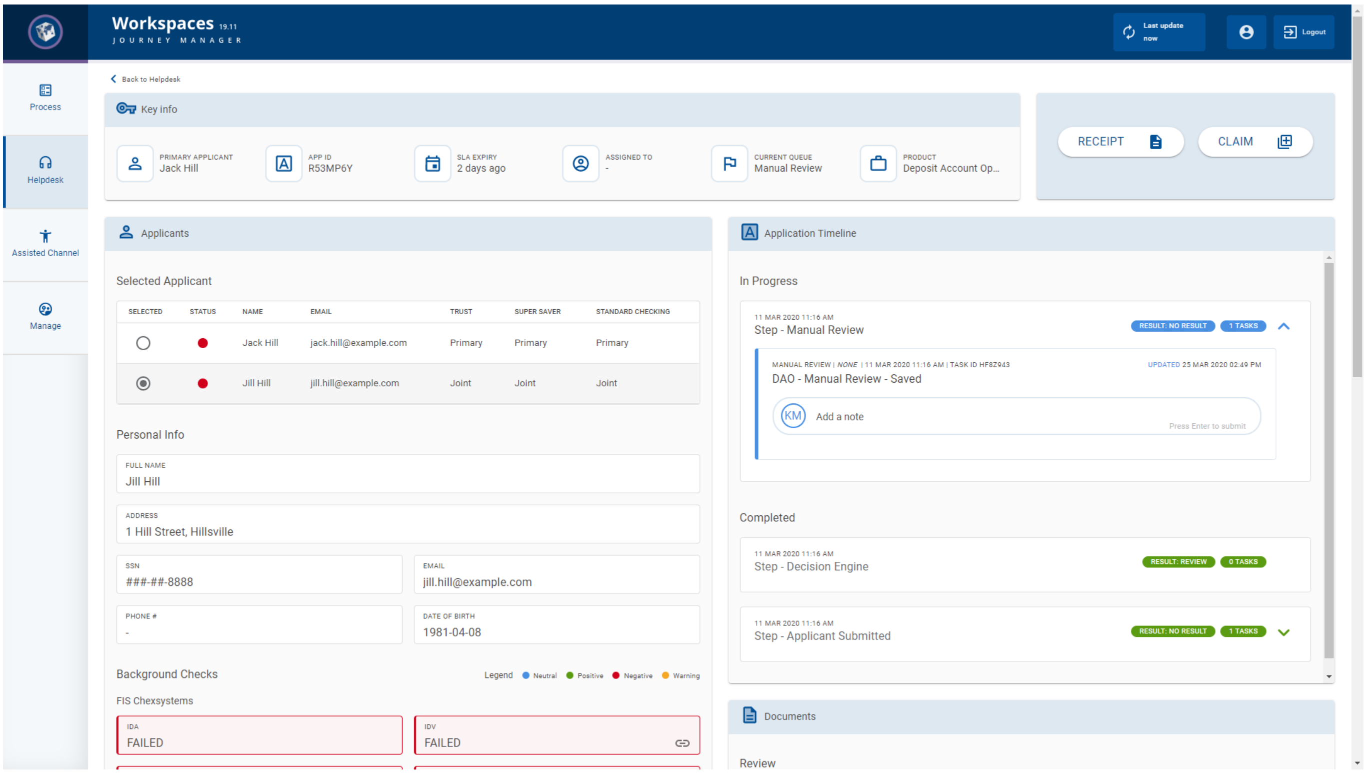
NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

- 23.04 and later
- 20.05 to 21.10
- 19.11 and earlier






# Actions

The helpdesk actions are:

- **Add Notes**: Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **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. 19.11This feature was introduced in the 19.11 release
- **Share**: Obtain a URL for a Details screen relating to a specific application, task and space. 23.10This feature was introduced in the 23.10 release
- **View Form**: Open an application that has been saved but not yet submitted in the original form.
- **View Notes**: View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release
- **Withdraw**: Cancel an application that has been saved but not yet submitted. 19.11This feature was introduced in the 19.11 release

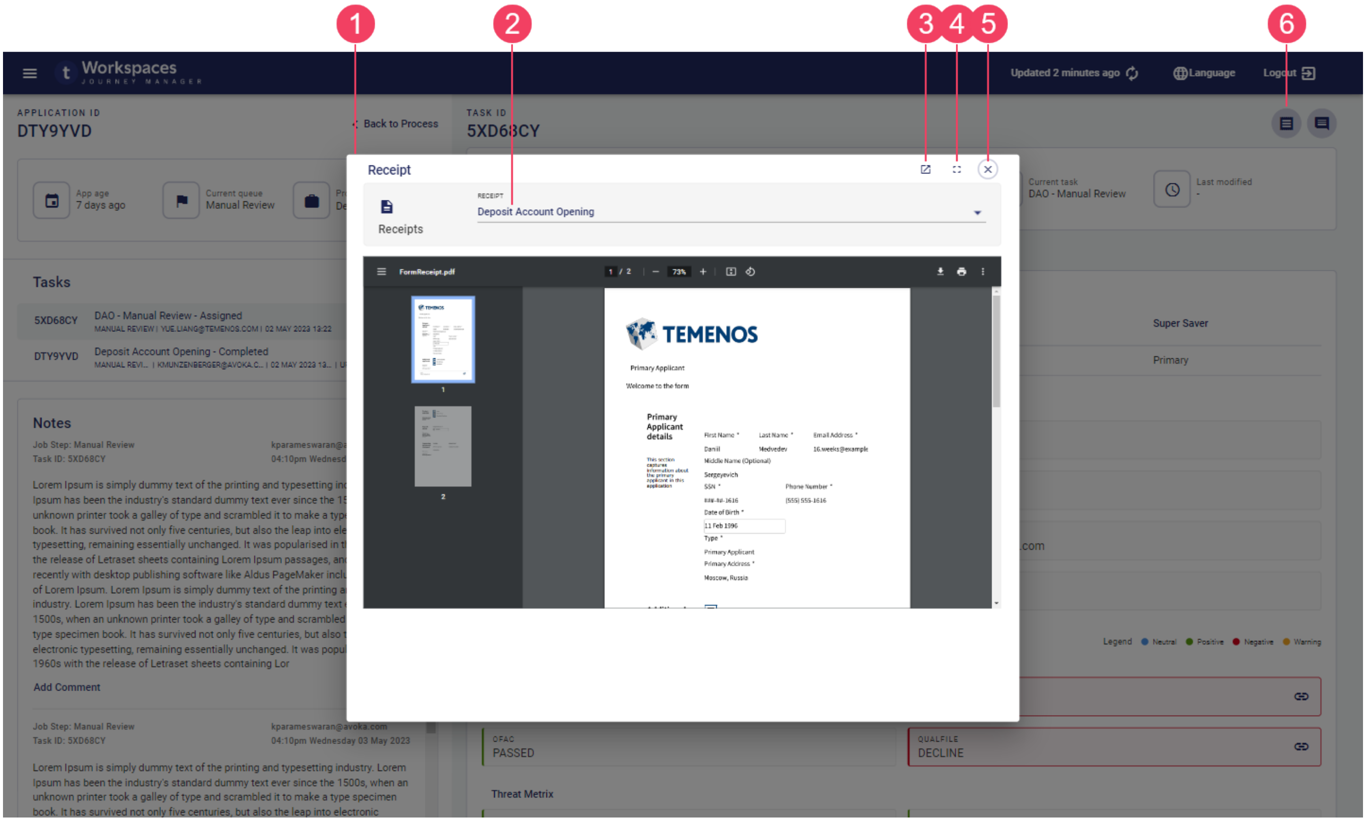
The Receipt and View Form actions are similar in that they both provide a way to view information entered by the applicant, but there are differences in how you can interact with that information. The Recover and Withdraw actions allow you to change the status of applications, generally at an applicant's 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

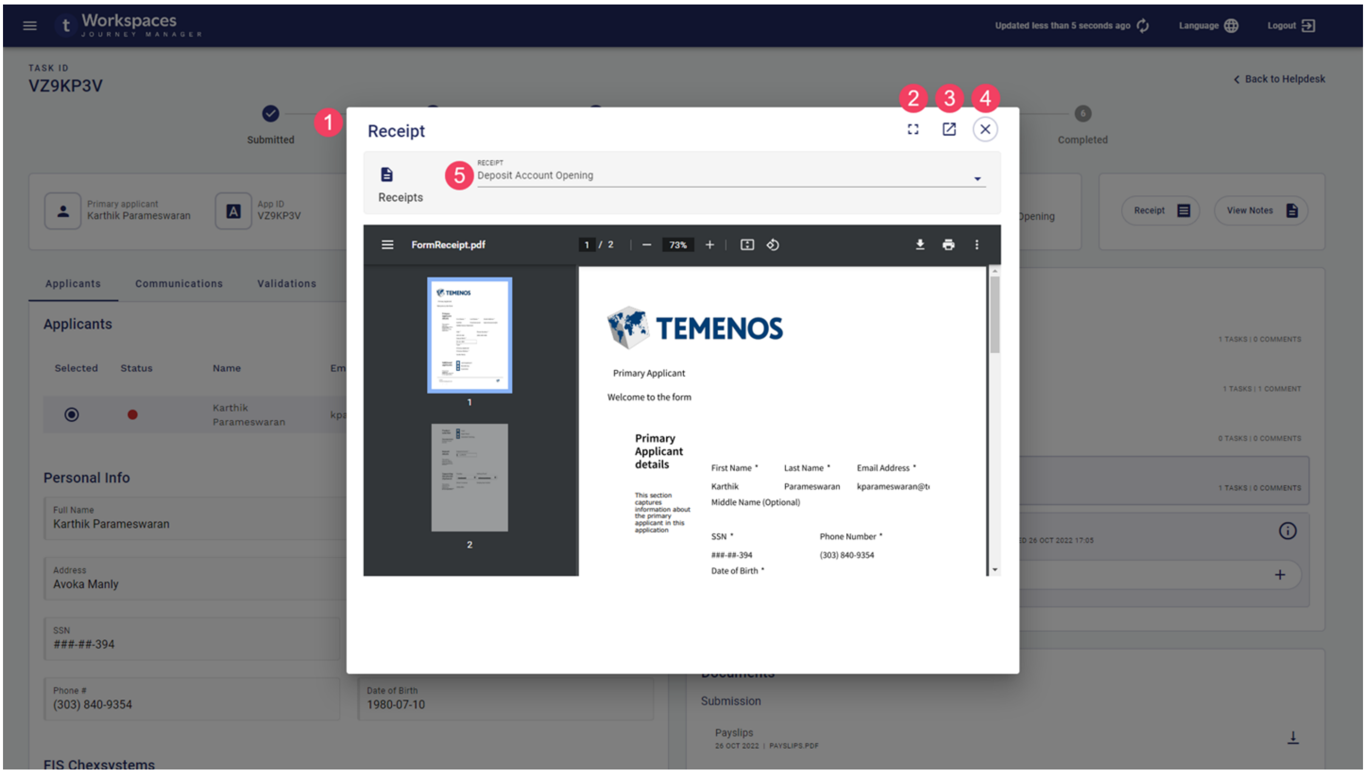
After you've submitted an application, you may want to see the information that was submitted. You can use the Receipt action to view the information for a submitted application.

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

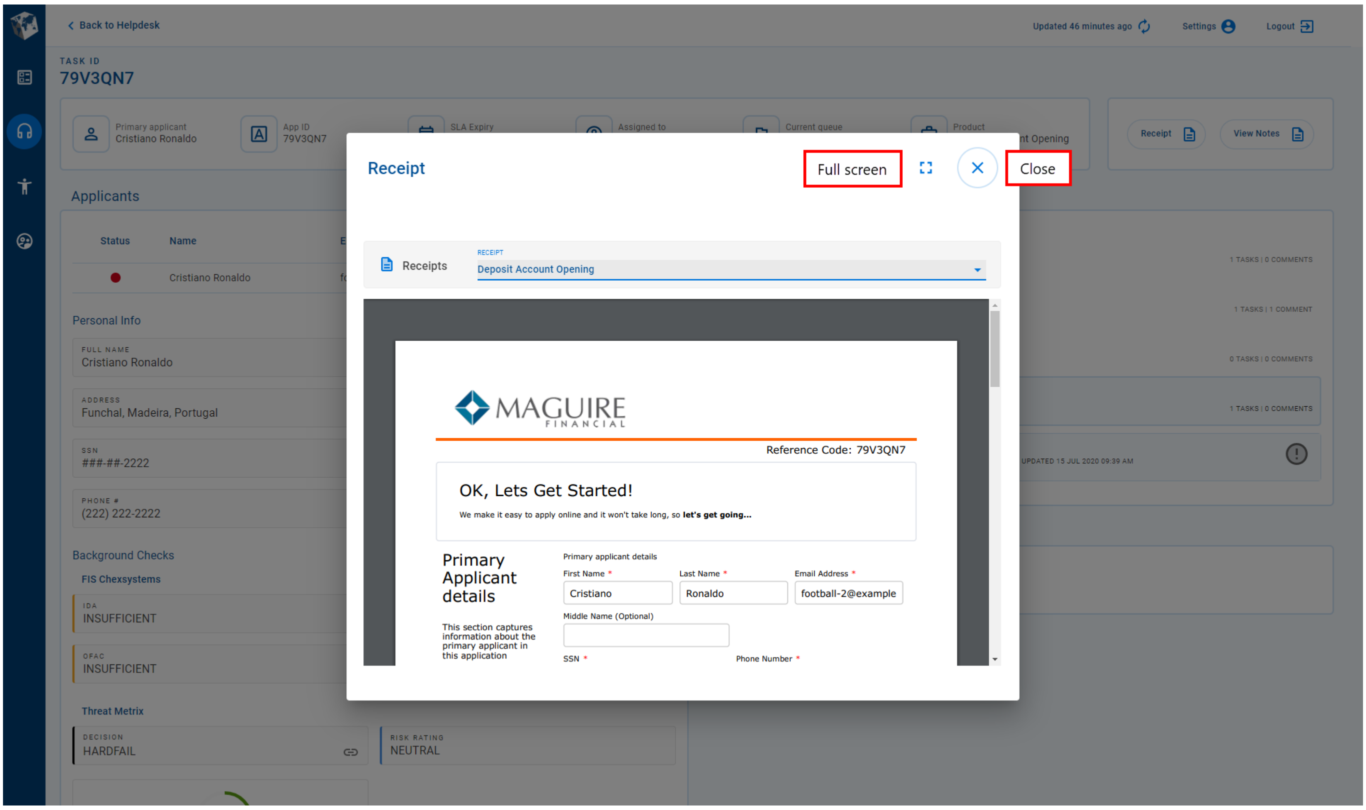
- 23.04
- 22.10
- 22.04 and earlier



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




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.

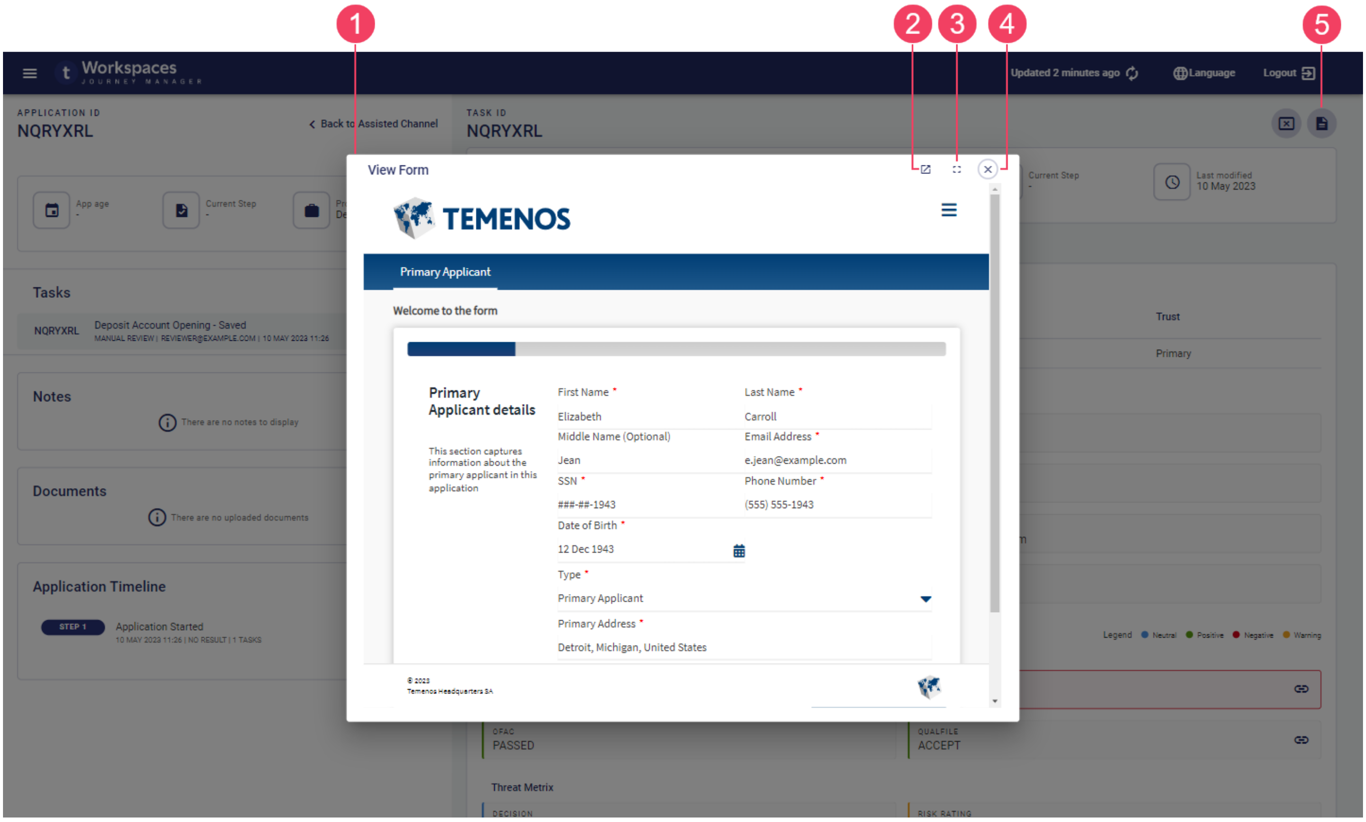
When you select the Receipt action, the receipt for the selected task is displayed unless there isn't a receipt associated with the task, in which case the most recent receipt is shown by default. However, if you're using Workspaces 22.04 or earlier, the most recent receipt is always displayed by default.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

TIP

To view the information in a submitted application, use the Receipt action.




1. View Form modal window
2. Pop out to new tab
3. Expand to full screen
4. Close modal window
5. View Form button

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

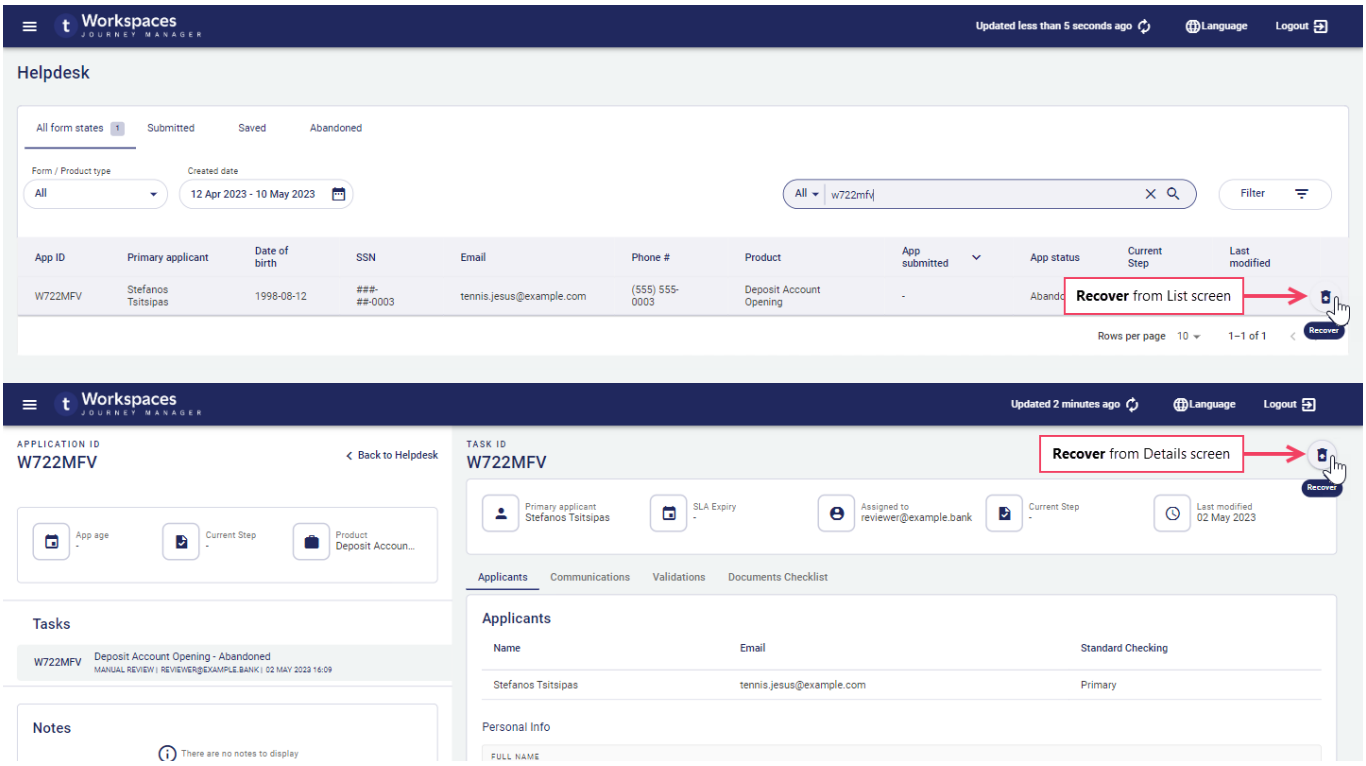
Let's say someone starts an application but their browser crashes before they can save or submit it. They give up on their application for now, and so it becomes . A short time later, the applicant decides to complete the application they started after all, so they call the support helpdesk.

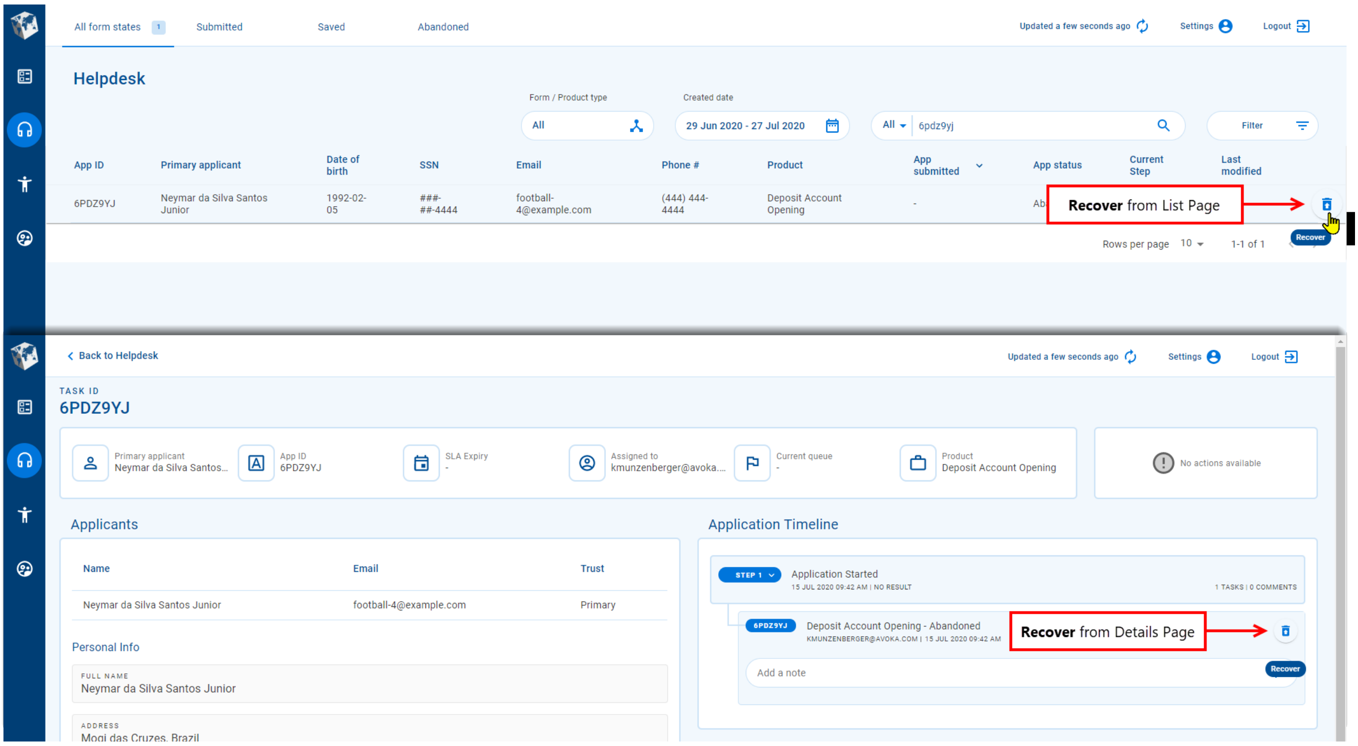
You're able to reassure the applicant because you can recover their application so that they can complete and submit it.

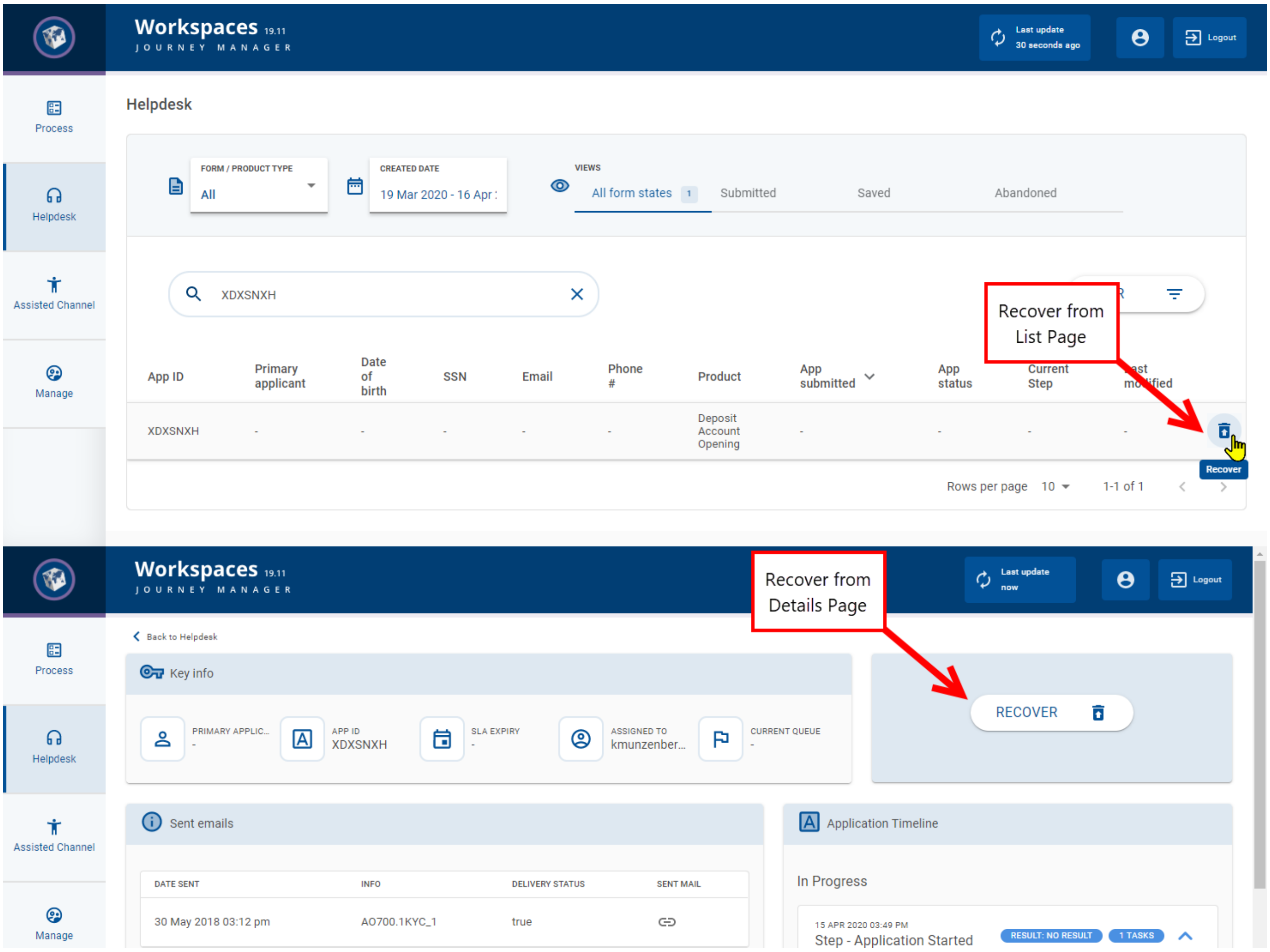
> NOTE
>
> Any Personally Identifiable Information (PII) in a recovered application is not available if the data retention period has expired.

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.

- 23.04
- 20.05 to 22.10
- Prior to 19.05




Recover from List Page
Recover from Details Page


Recover from List Page
Recover from Details Page

INFO | 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.

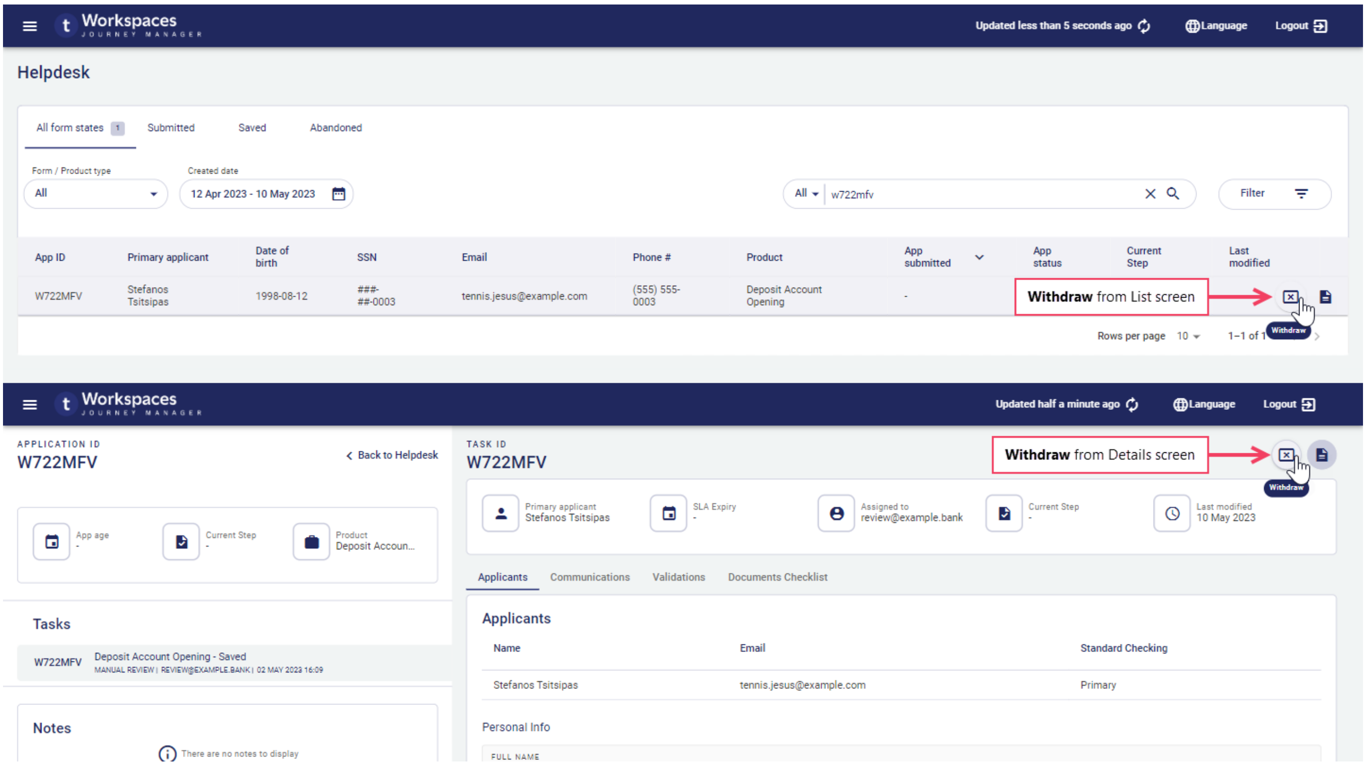
In addition to abandoned applications, an application that has been withdrawn can also be recovered.

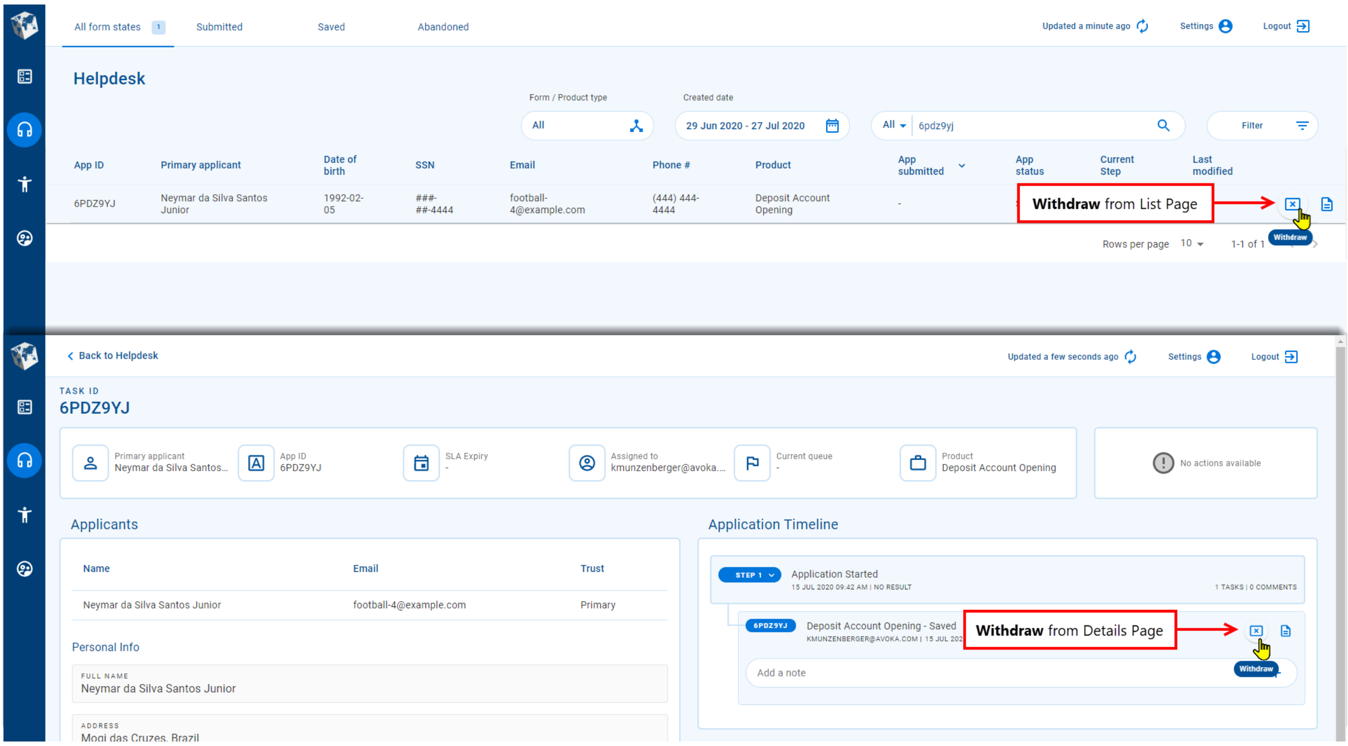
### Withdraw an Application

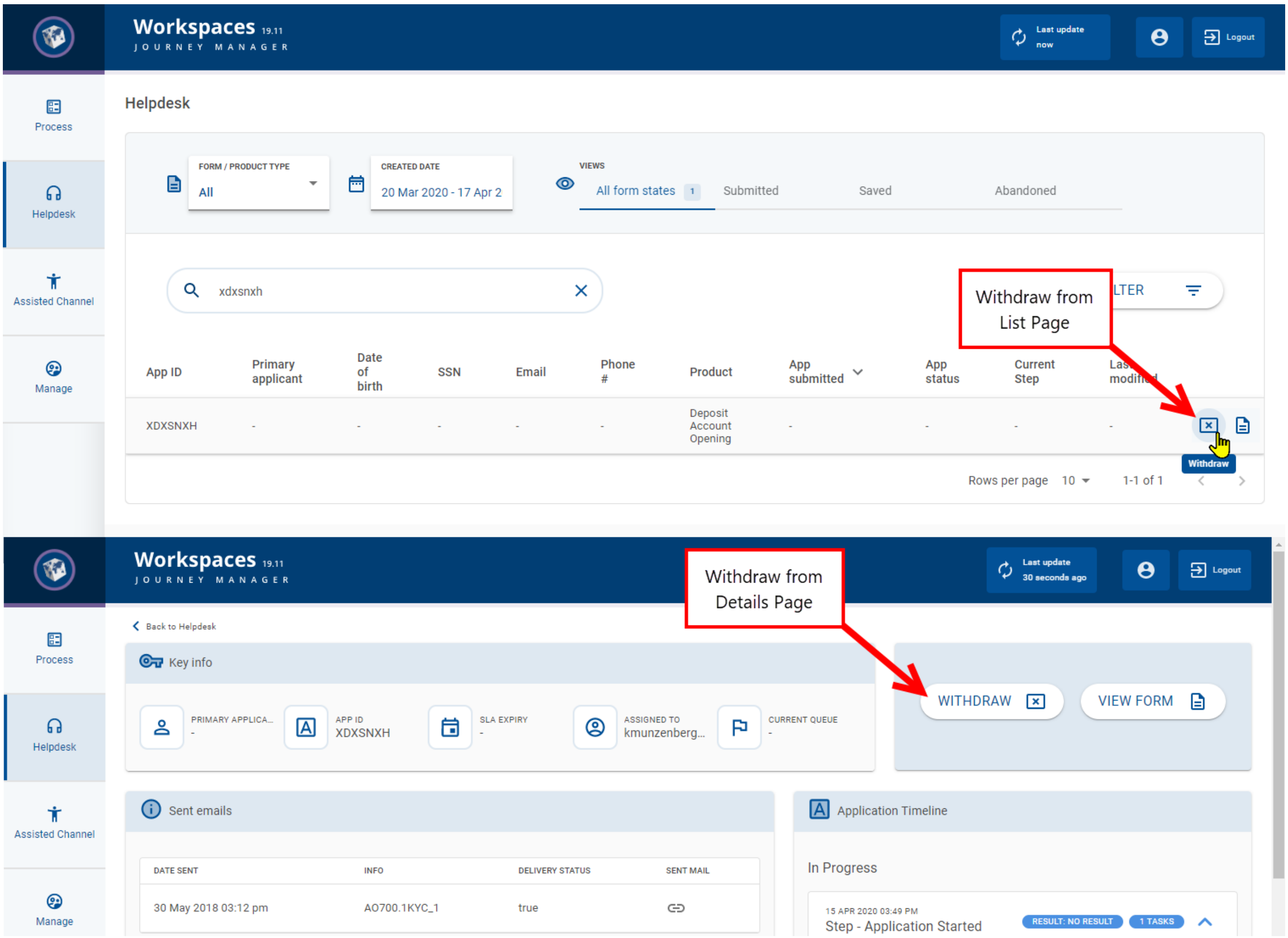
Now, let's say someone starts an application but, before submitting it, they decide not to proceed with the application after all. So, they contact the support helpdesk and ask for the application to be canceled. You can help the applicant here by withdrawing the application.

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.

- 23.04
- 20.05 to 22.10
- Prior to 19.05


Workspaces
Helpdesk
Withdraw from List screen
Withdraw
Withdraw from Details screen
Withdraw
APPLICATION ID
W722MFV
TASK ID
W722MFV
Tasks
Notes


Helpdesk
Withdraw from List Page
Withdraw
TASK ID
6PDZ9YJ
Applicants
Application Timeline
Withdraw from Details Page
Withdraw




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

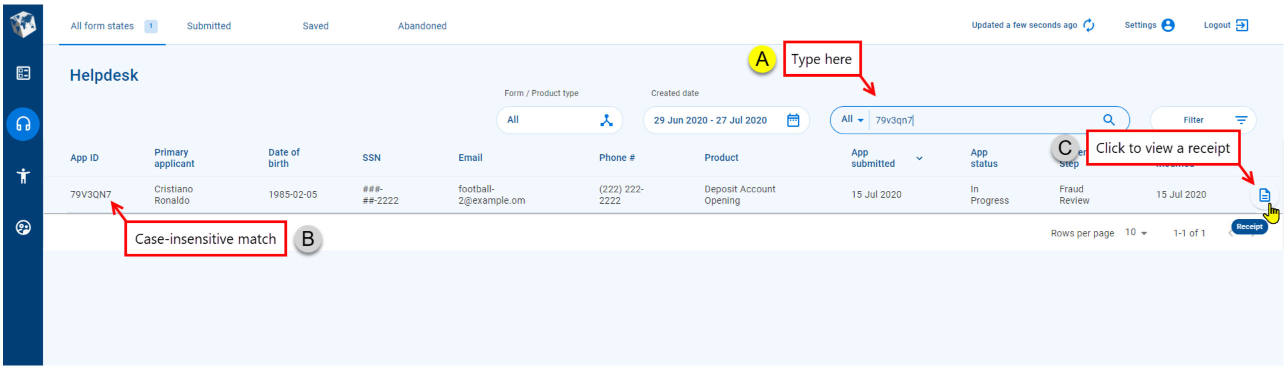
Step-by-step examples are also available for other actions that you may find useful while responding to applicant inquiries.

- View all notes for an application on the Details screen 23.04This feature was removed in the 23.04 release
- Upload a document on the Details screen

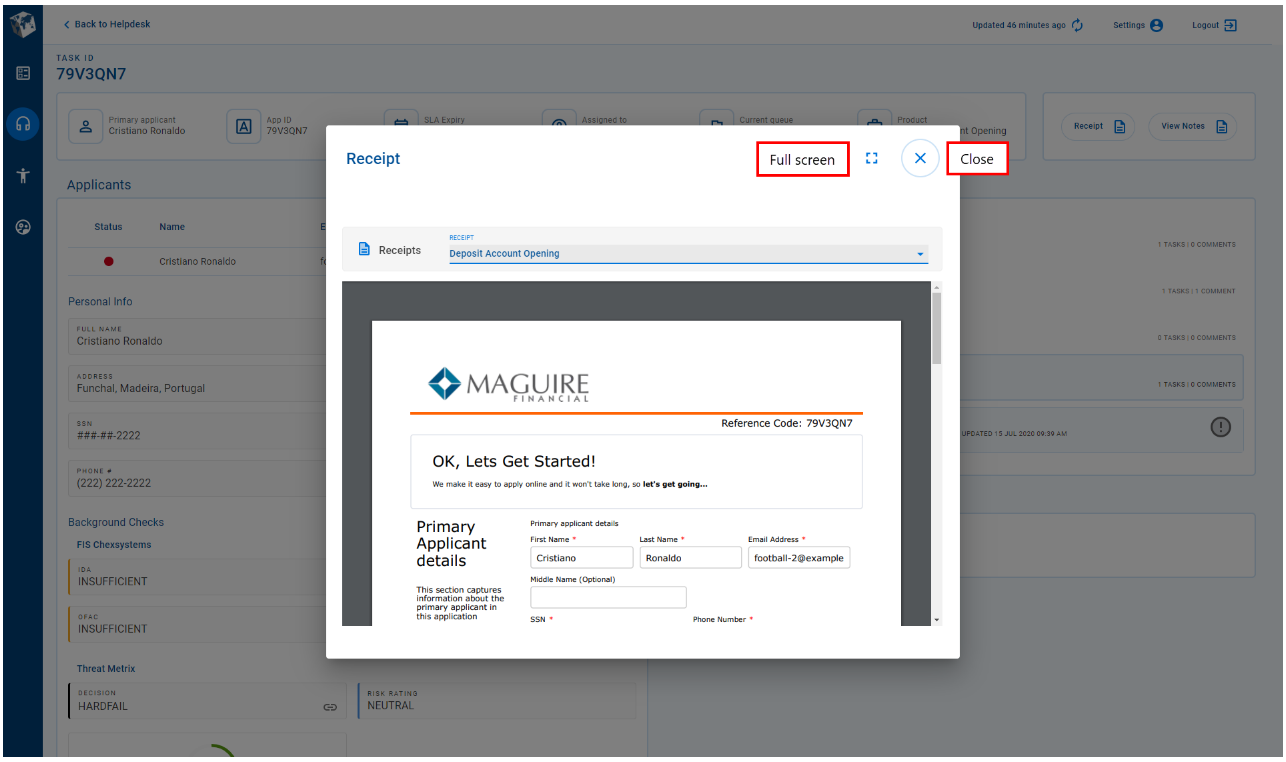
### View a Receipt

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. In the Search box, 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.

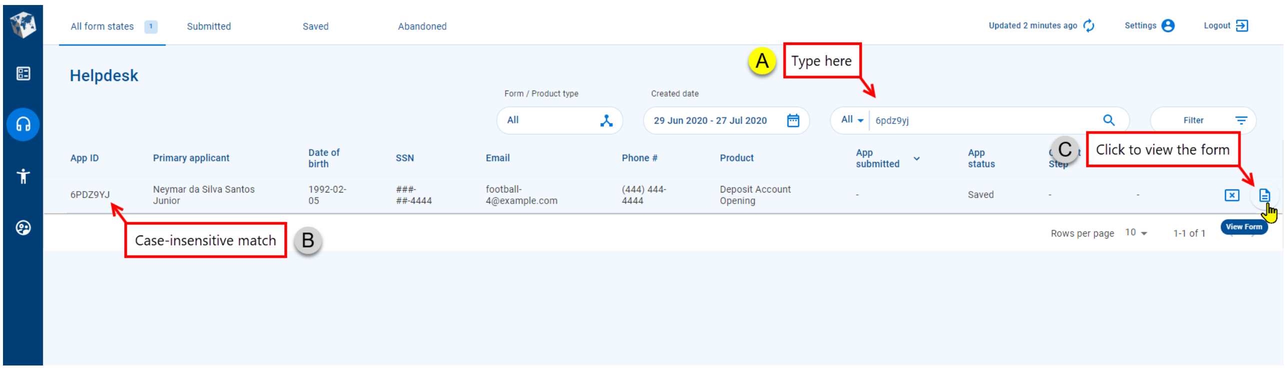



4. When you're finished viewing the receipt, click closeClose in the top-right corner to close the Receipt window and return to the Details screen.

## View a Form

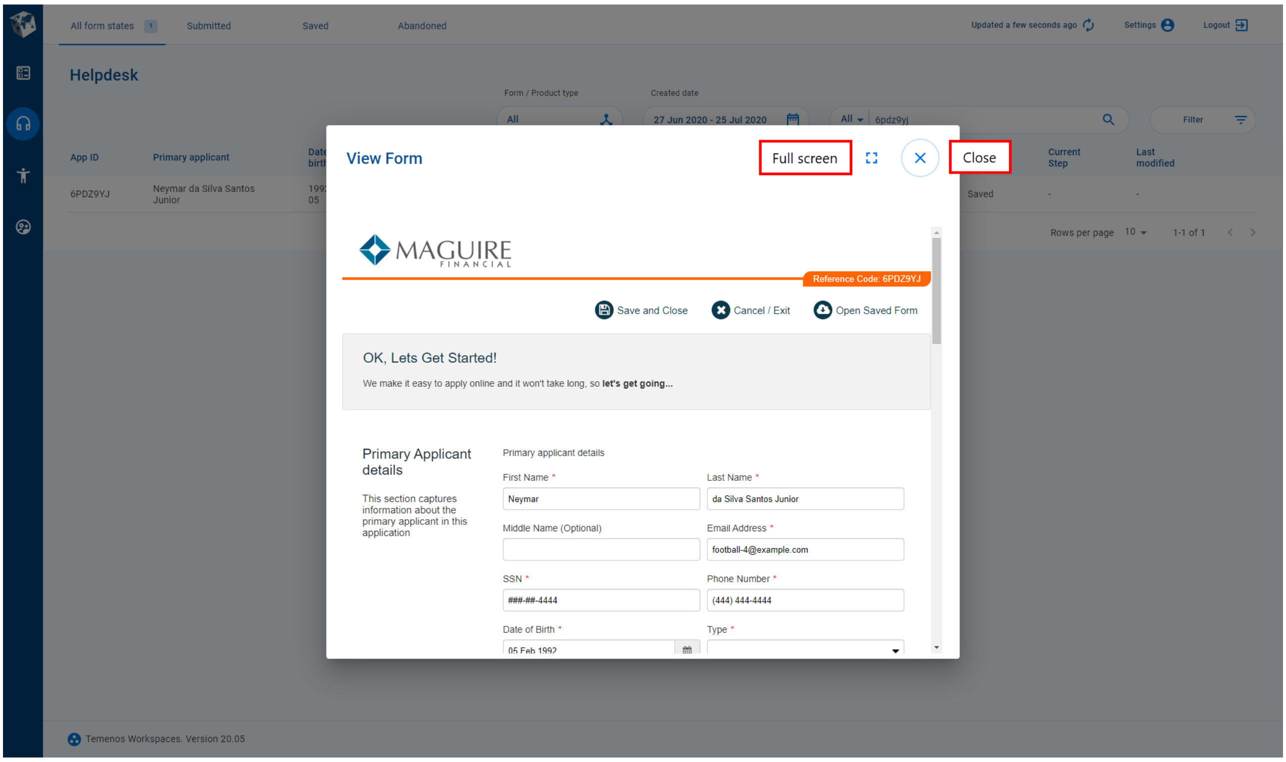
This example shows you how to locate a task for a saved application using the search feature, then view and update the saved information.

1. Login to Workspaces and select the Helpdesk space.
2. In the Search box, 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 descriptionView 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.

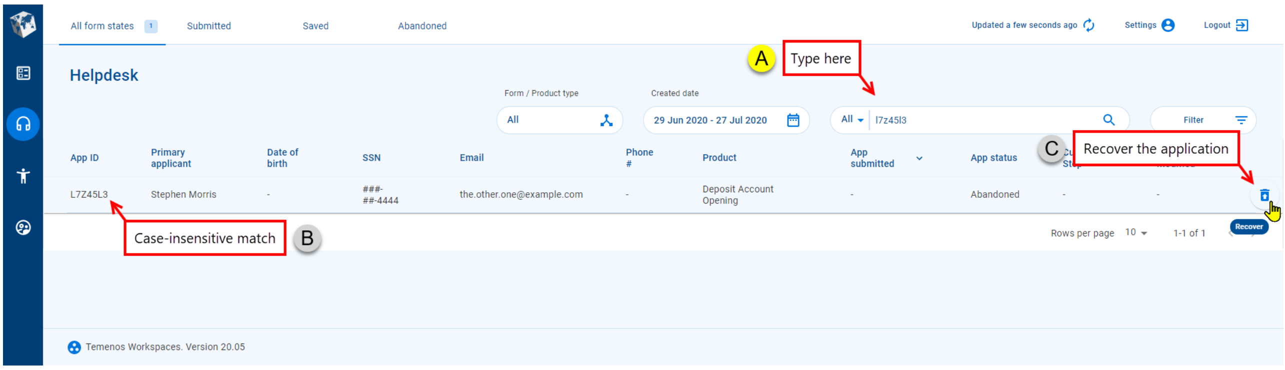



5. Update the form, adding or modifying details as appropriate, then click Save and Close on the form to save your changes.
6. When you're finished updating the form, click closeClose in the top-right corner to close the View Form window and return to the List screen.

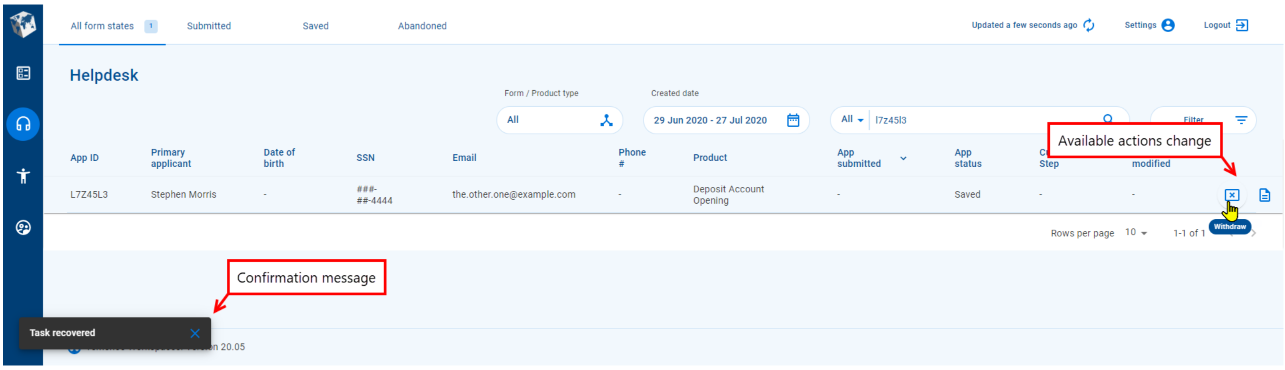
## Recover an Abandoned Application

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. In the Search box, 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 if the application has been saved, either intentionally by the applicant or in the background by the form, before becoming abandoned or being withdrawn.
4. Click restore_from_trashRecover. The  available actions change, and a message confirming you have recovered the application is displayed briefly in the bottom-left corner of the screen.

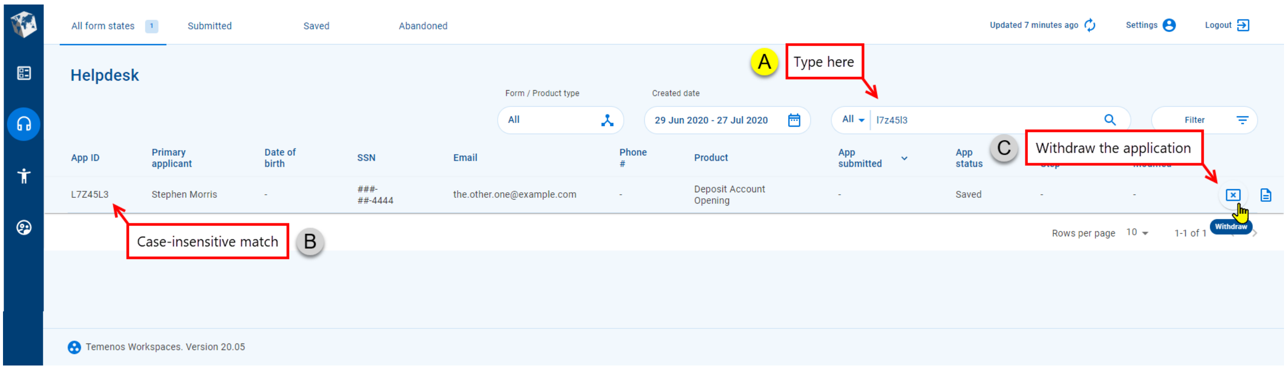



The application is now available for the applicant to continue. How the applicant accesses the recovered application will depend on how your Workspaces portal is configured. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their application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

## Withdraw an Unsubmitted Application

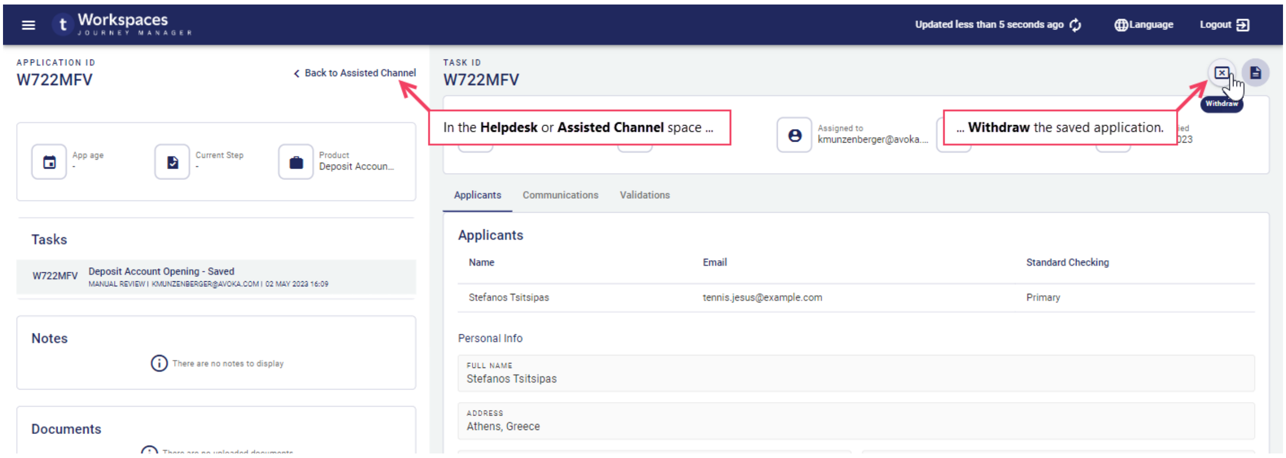
This example shows you how to locate an unsubmitted application using the search feature, view the application's details to confirm you have the correct application, then cancel the application by withdrawing it on the Details screen.

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.

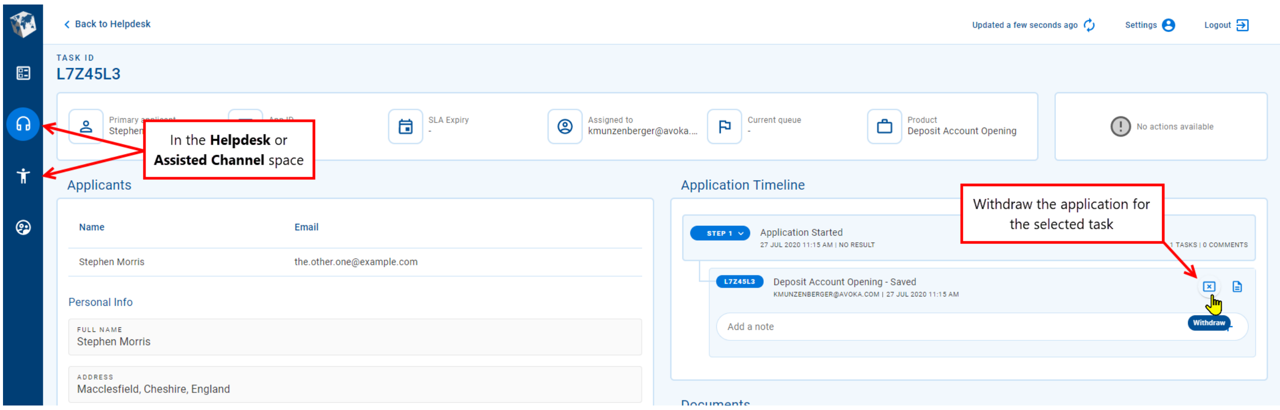



3. If you point your cursor at the item you found, the available actions appear at the right-hand side of the item list. The Withdraw action is available here if the application has been saved, either intentionally by the applicant or in the background by the form. While you could withdraw the application 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 cancel_presentationWithdraw.
    - 23.04
    - 20.05 to 22.10
    - Prior to 20.05 (EOL)

cancel_presentationWithdraw is located in the Actions group.

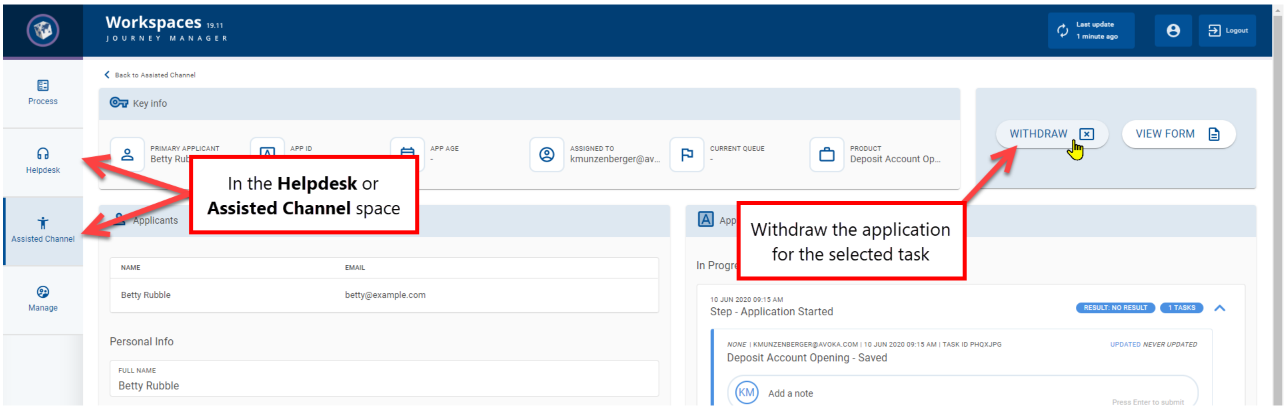



cancel_presentationWithdraw is located within the selected task in the application timeline.




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

The Withdraw button is located in the Action panel.




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

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

# Workspaces Assisted Channel

NOTE

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

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.

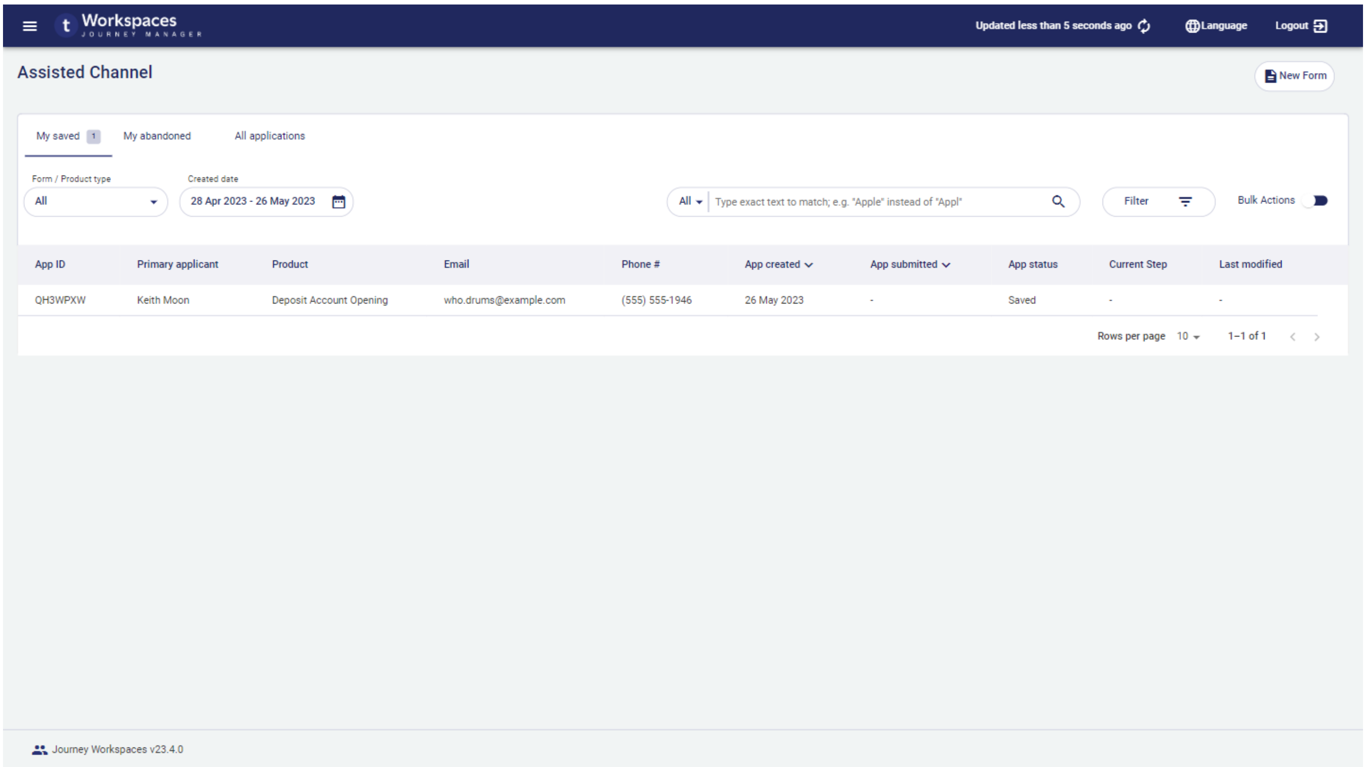
## List Screen

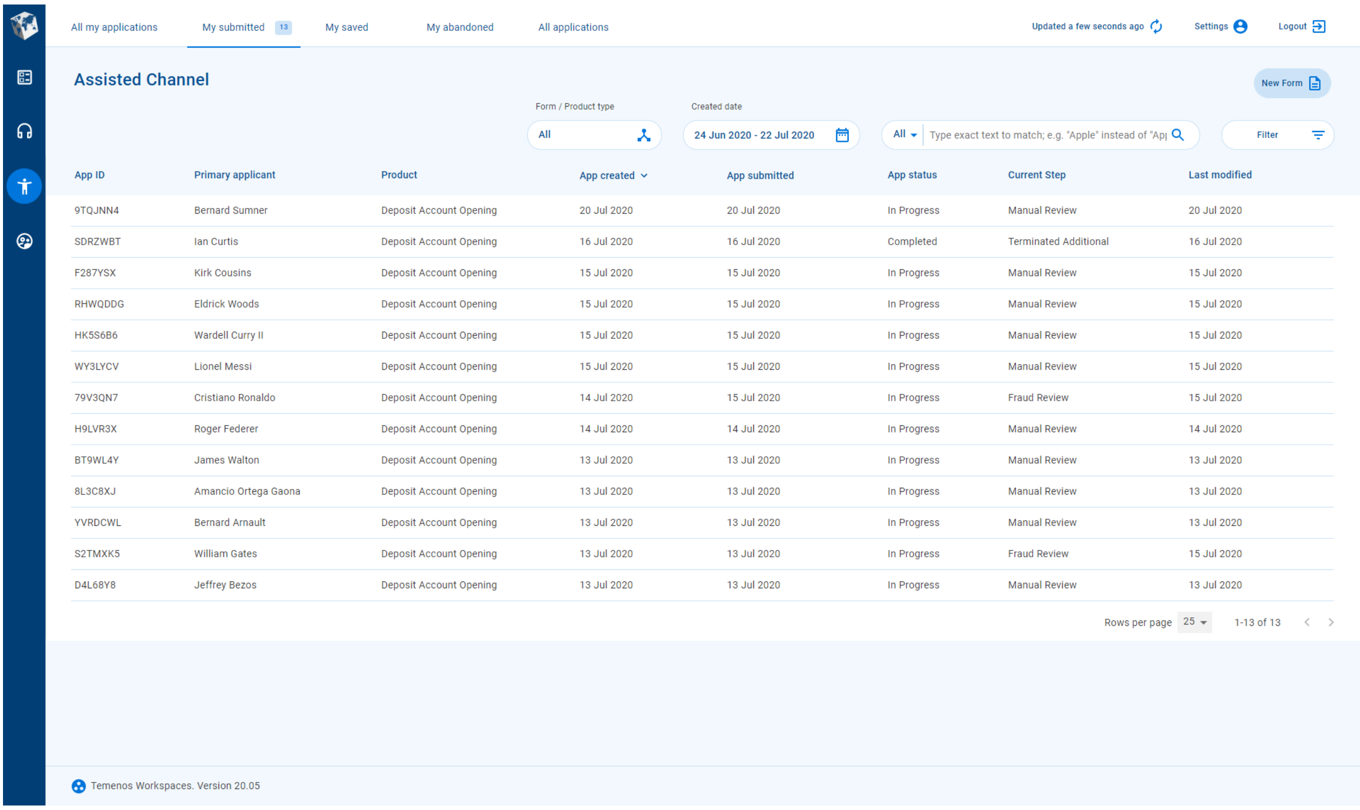
The List screen in the Assisted Channel space includes all of the standard features of a WorkspacesList screen.

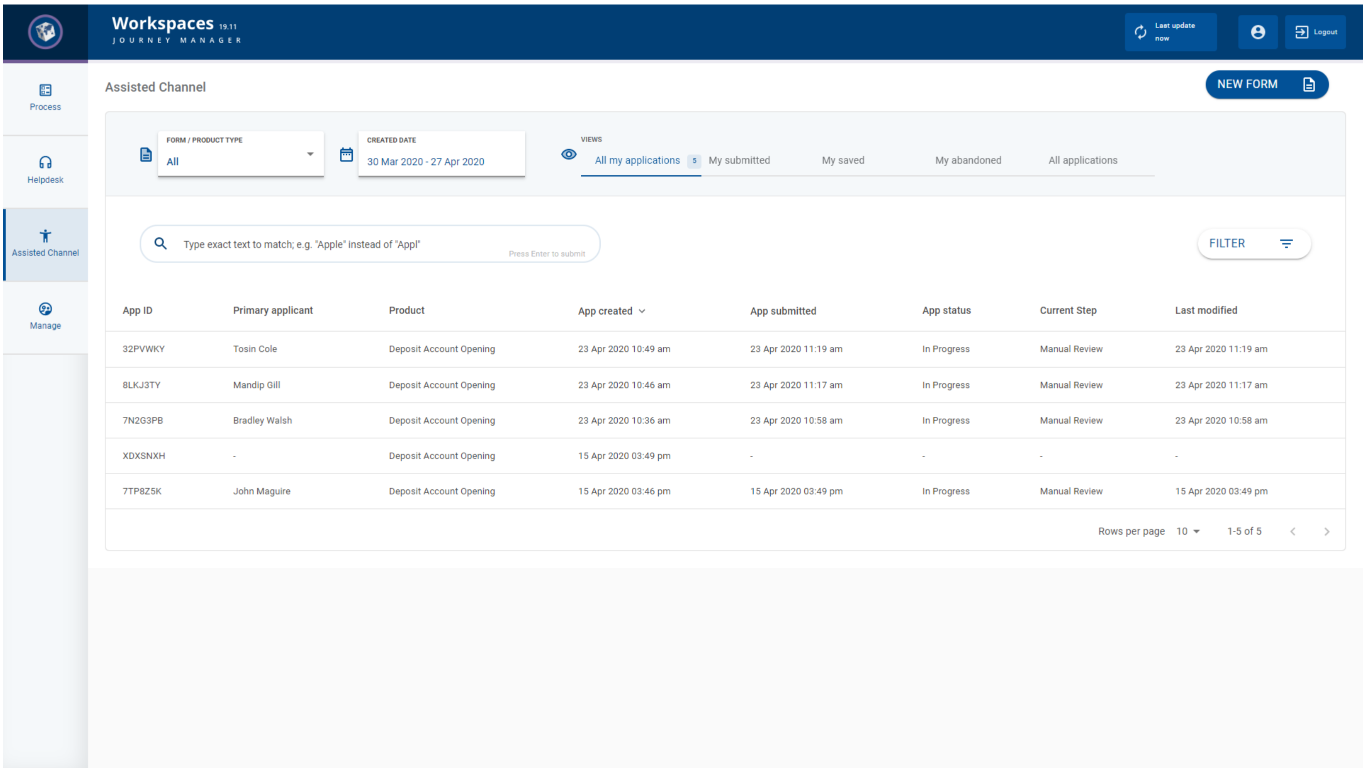
- An item list containing a list of applications, and which may be empty initially depending upon how it is populated.
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- A global filter that restricts the applications in the item list to just those for a selected form / product type.
- A Created Date global filter 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. 22.10This feature was introduced in the 22.10 release
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

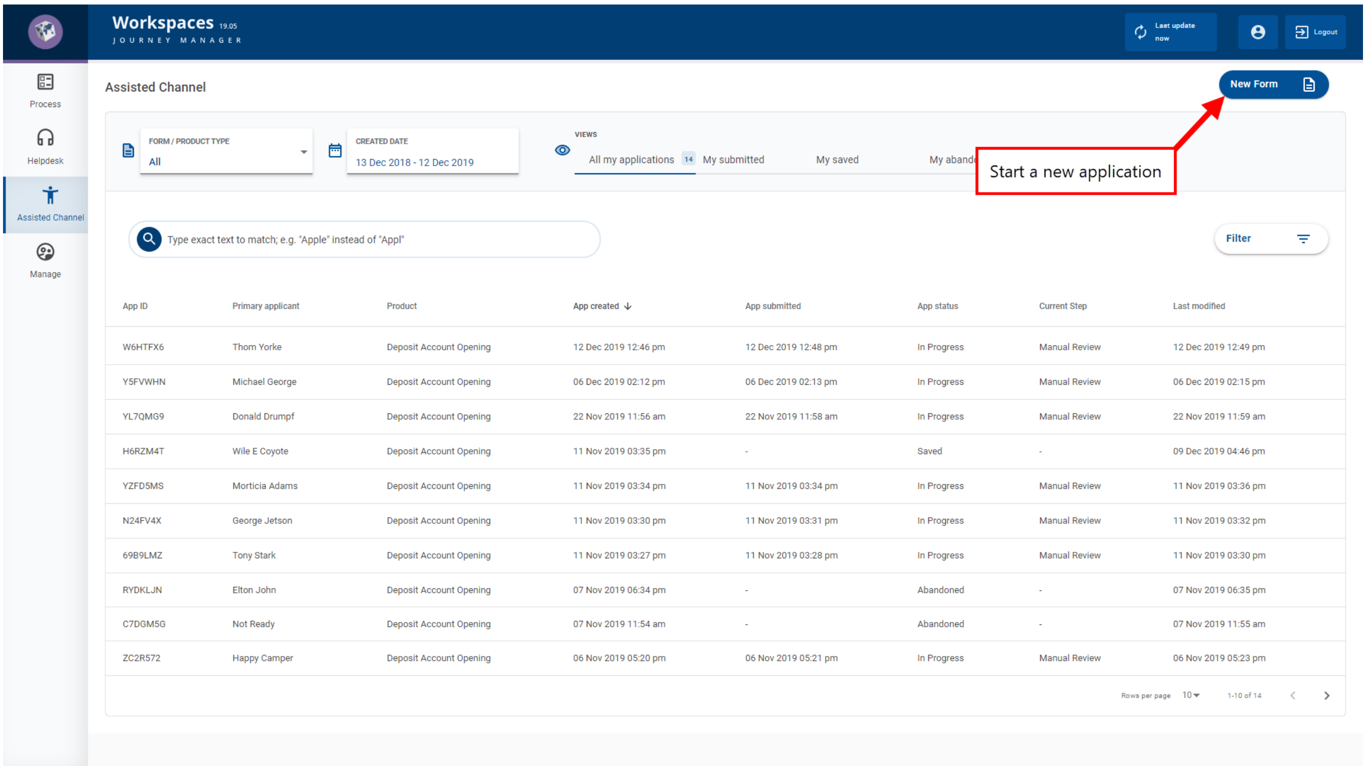
- 23.04 and later
- 20.05 to 22.10

- [19.11]()
- [19.05]()


Workspaces
JOURNEY MANAGER
Updated less than 5 seconds ago
Language
Logout
Assisted Channel
New Form
My saved 1
My abandoned
All applications
Form / Product type
All
Created date
28 Apr 2023 - 26 May 2023
All
Type exact text to match; e.g. "Apple" instead of "Appl"
Filter
Bulk Actions
App ID
Primary applicant
Product
Email
Phone #
App created
App submitted
App status
Current Step
Last modified
QH3WPXW Keith Moon Deposit Account Opening who.drums@example.com (555) 555-1946 26 May 2023 - Saved - -
Rows per page 10
1–1 of 1
Journey Workspaces v23.4.0


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




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 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 an application and a selected task, and provides access to the Assisted Channel actions. Each of the following features is contained in a separate container (pane, card or section).

- Separate panes for application and task content. 23.04This feature was introduced in the 23.04 release
- Separate key information cards for the application and the selected task. 23.04This feature was introduced in the 23.04 release
- The ability to track application progress against an SLA.
- A progress stepper showing a high-level indication of the application's progress. 23.04This feature was updated in the 23.04 release
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane. 23.04This feature was introduced in the 23.04 release
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff.
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through. 23.04This feature was updated in the 23.04 release
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform in the Assisted Channel space at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - Personal information for the selected applicant, including identity and contact details.

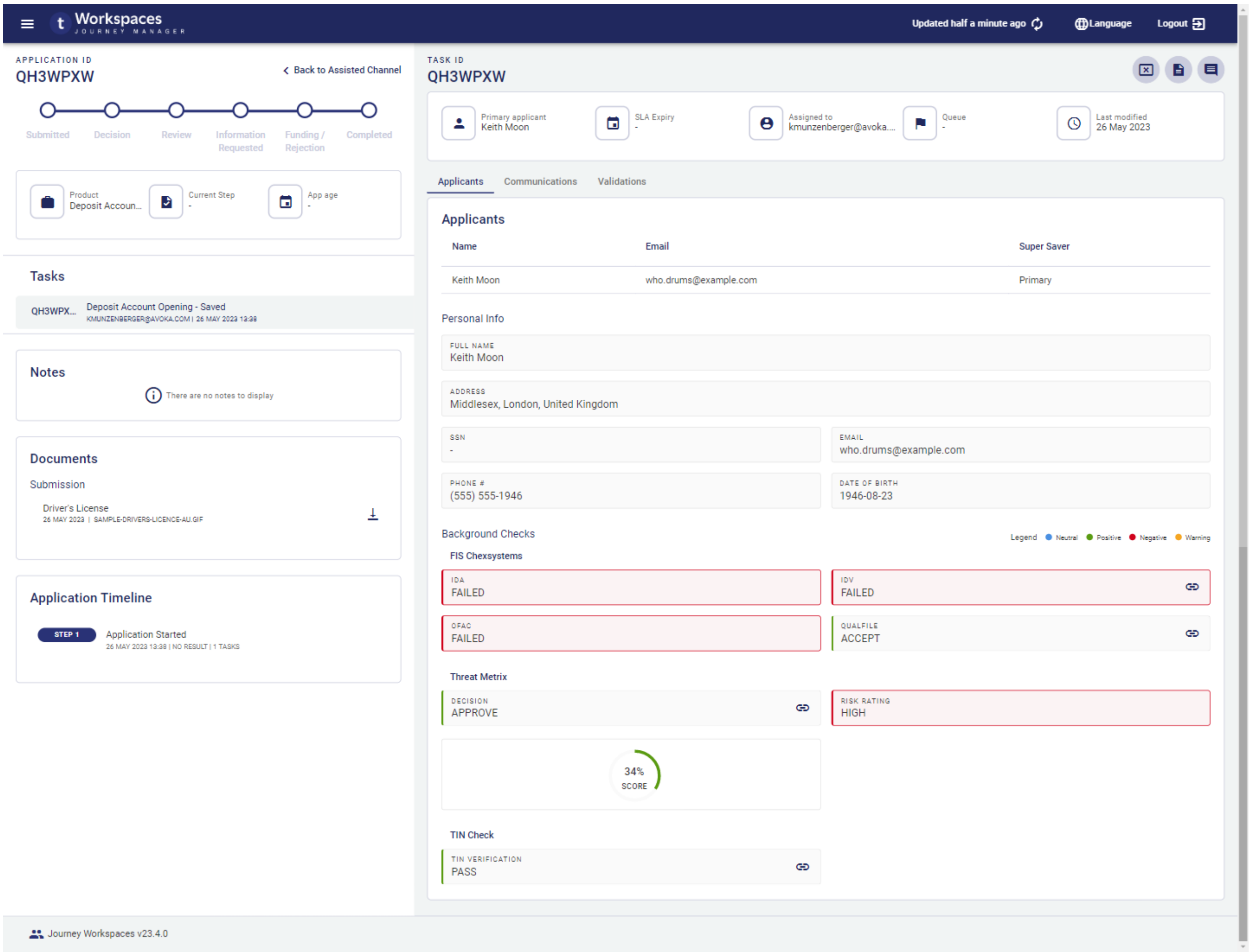
    - The outcomes of preconfigured background checks which provide an assessment of a selected applicant's suitability.
- A Communications tab listing emails sent to the applicant with options to view and resend.
- Options to view the details of background checks in various formats including JSON, XML, HTML, or PDF.
- A checklist of documents that need to be uploaded, as well as an upload status for each document.

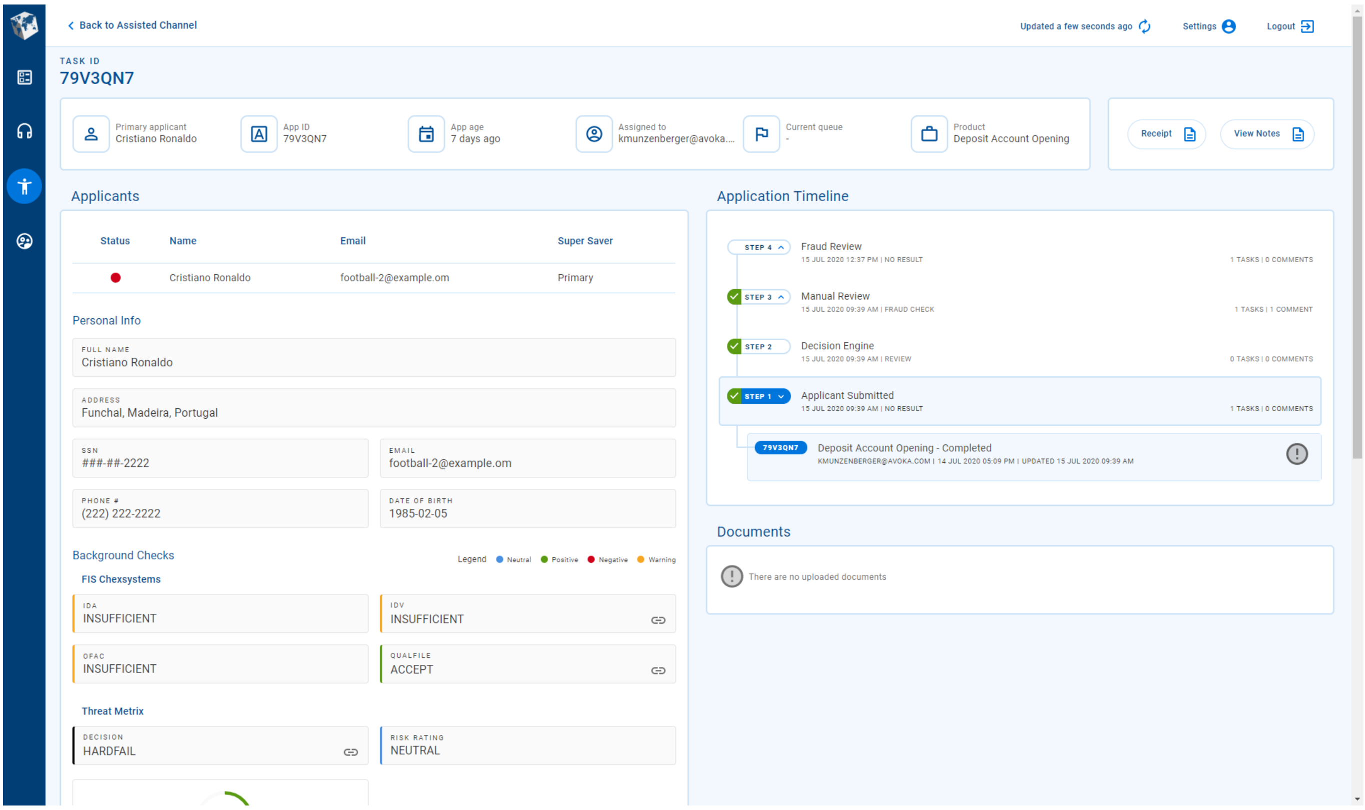
To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.

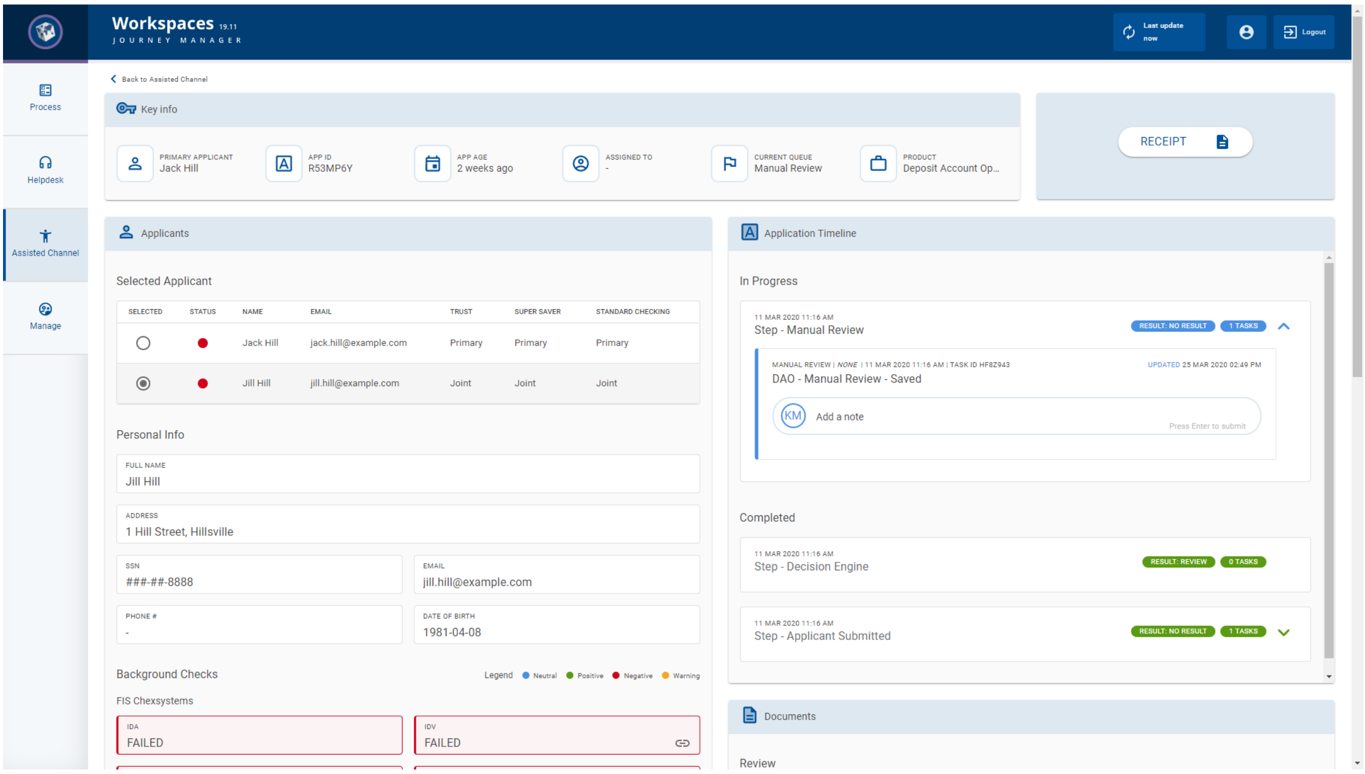
NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

- 23.04 and later
- 20.05 to 21.10
- 19.11 and earlier


Workspaces
JOURNEY MANAGER
Updated half a minute ago
Language
Logout
APPLICATION ID
QH3WPXW
Back to Assisted Channel
Submitted
Decision
Review
Information Requested
Funding / Rejection
Completed
Product
Deposit Accoun...
Current Step
-
App age
-
Tasks
QH3WPX...
Deposit Account Opening - Saved
KMUNZENBERGER@AVOKA.COM | 26 MAY 2023 13:38
Notes
There are no notes to display
Documents
Submission
Driver's License
26 MAY 2023 | SAMPLE-DRIVERS-LICENCE-AU.GIF
Application Timeline
STEP 1
Application Started
26 MAY 2023 13:38 | NO RESULT | 1 TASKS
TASK ID
QH3WPXW
Primary applicant
Keith Moon
SLA Expiry
-
Assigned to
kmunzenberger@avoka...
Queue
-
Last modified
26 May 2023
Applicants
Communications
Validations
Applicants
Name
Email
Super Saver
Keith Moon
who.drums@example.com
Primary
Personal Info
FULL NAME
Keith Moon
ADDRESS
Middlesex, London, United Kingdom
SSN
-
EMAIL
who.drums@example.com
PHONE #
(555) 555-1946
DATE OF BIRTH
1946-08-23
Background Checks
Legend
Neutral
Positive
Negative
Warning
FIS Chexsystems
IDA
FAILED
IDV
FAILED
OFAC
FAILED
QUALFILE
ACCEPT
Threat Metrix
DECISION
APPROVE
RISK RATING
HIGH
34%
SCORE
TIN Check
TIN VERIFICATION
PASS
Journey Workspaces v23.4.0




# Actions

The assisted channel actions are:

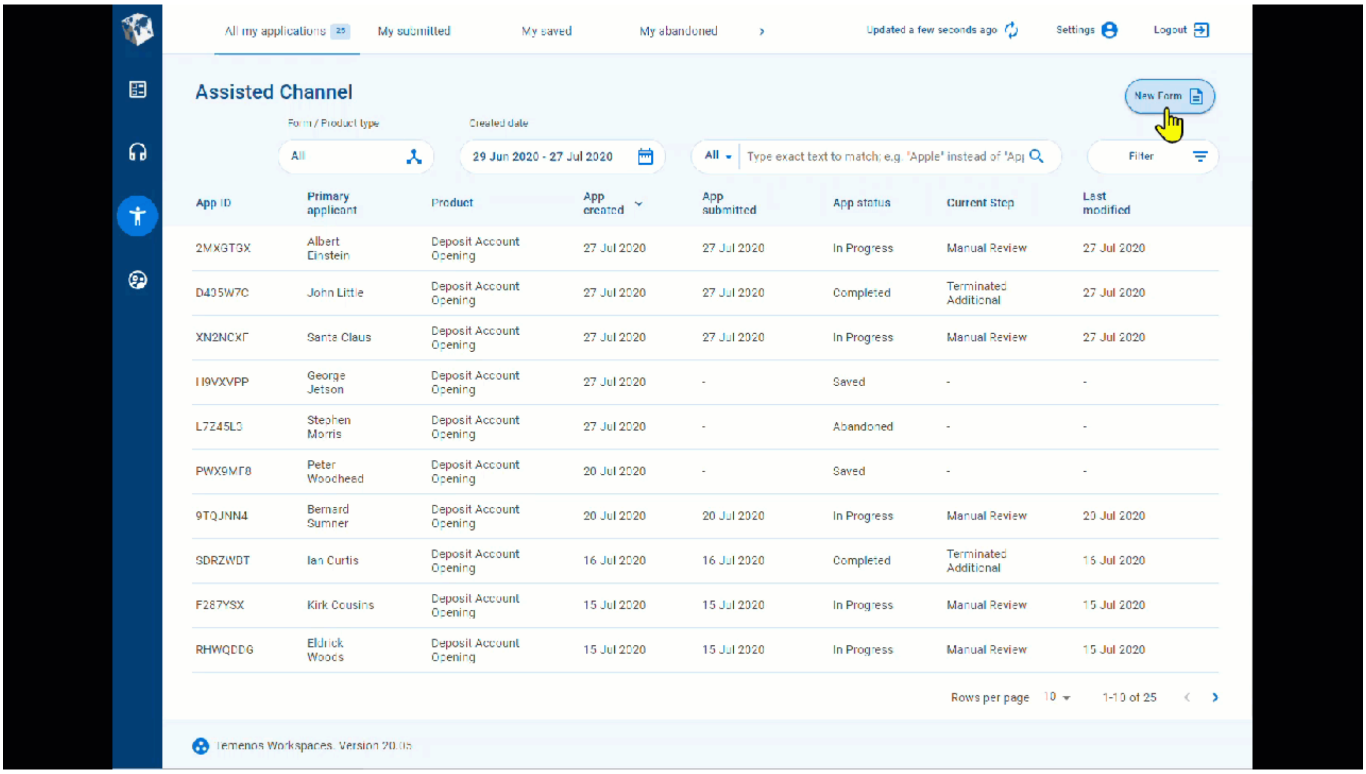
- **Add Notes**: Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **New Form**: Start a new application on behalf of someone else.
- **Receipt**: See a read-only view of a submitted application.
- **Recover**: Recover an abandoned or withdrawn application so that the applicant can continue with it. 19.11This feature was introduced in the 19.11 release
- **Share**: Obtain a URL for a Details screen relating to a specific application, task and space. 23.10This feature was introduced in the 23.10 release
- **View Form**: Open an application that has been saved but not yet submitted in the original form.
- **View Notes**: View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release
- **Withdraw**: Cancel an application that has been saved but not yet submitted. 19.11This feature was introduced in the 19.11 release

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 action can only be accessed by an authenticated user; that is, a user who is logged in to Journey Workspaces 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 with New Form.

INFO

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. 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

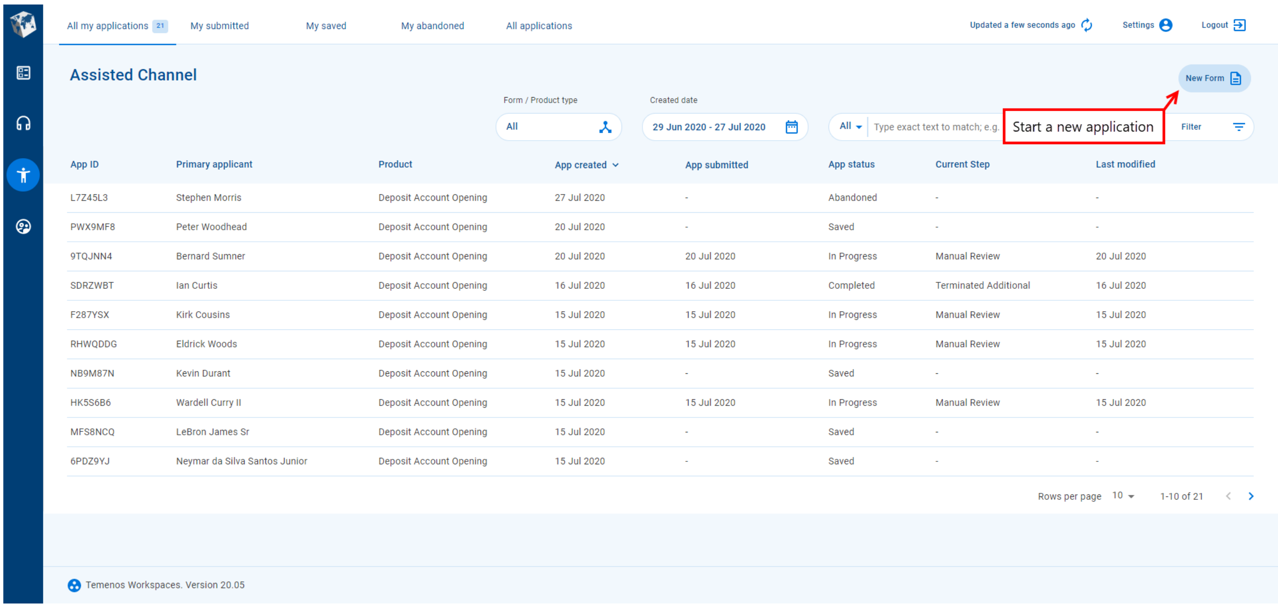
Step-by-step examples are also available for other actions that you may find useful while assisting customers with applications.

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen 23.04This feature was removed in the 23.04 release
- 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

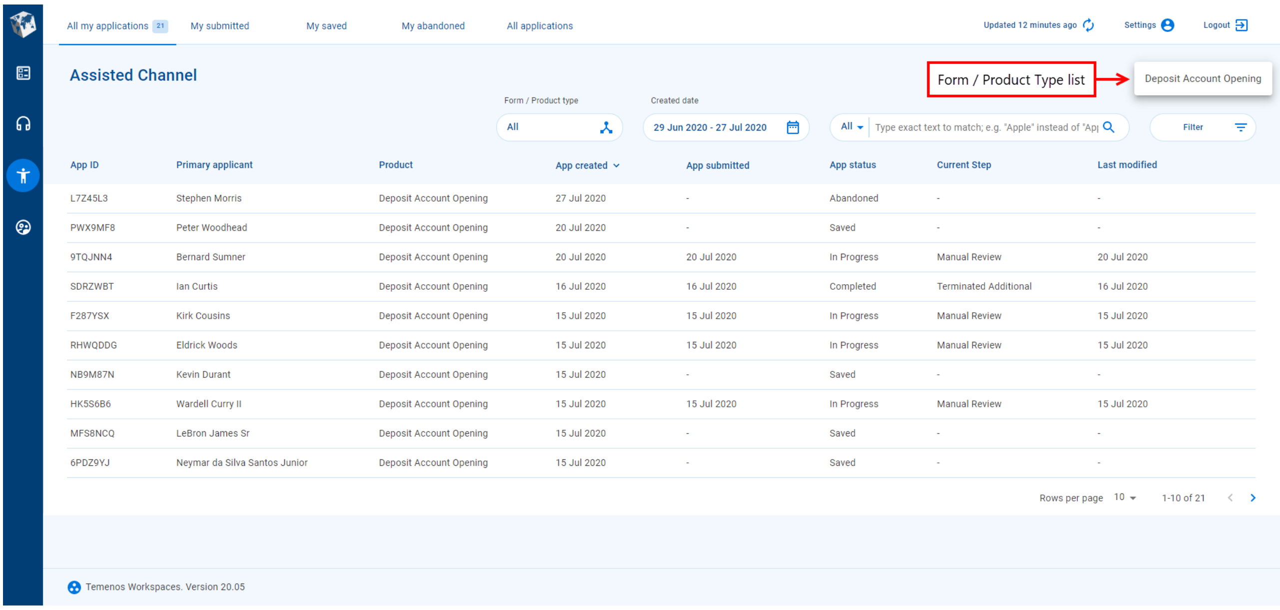
### Start an Application

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.

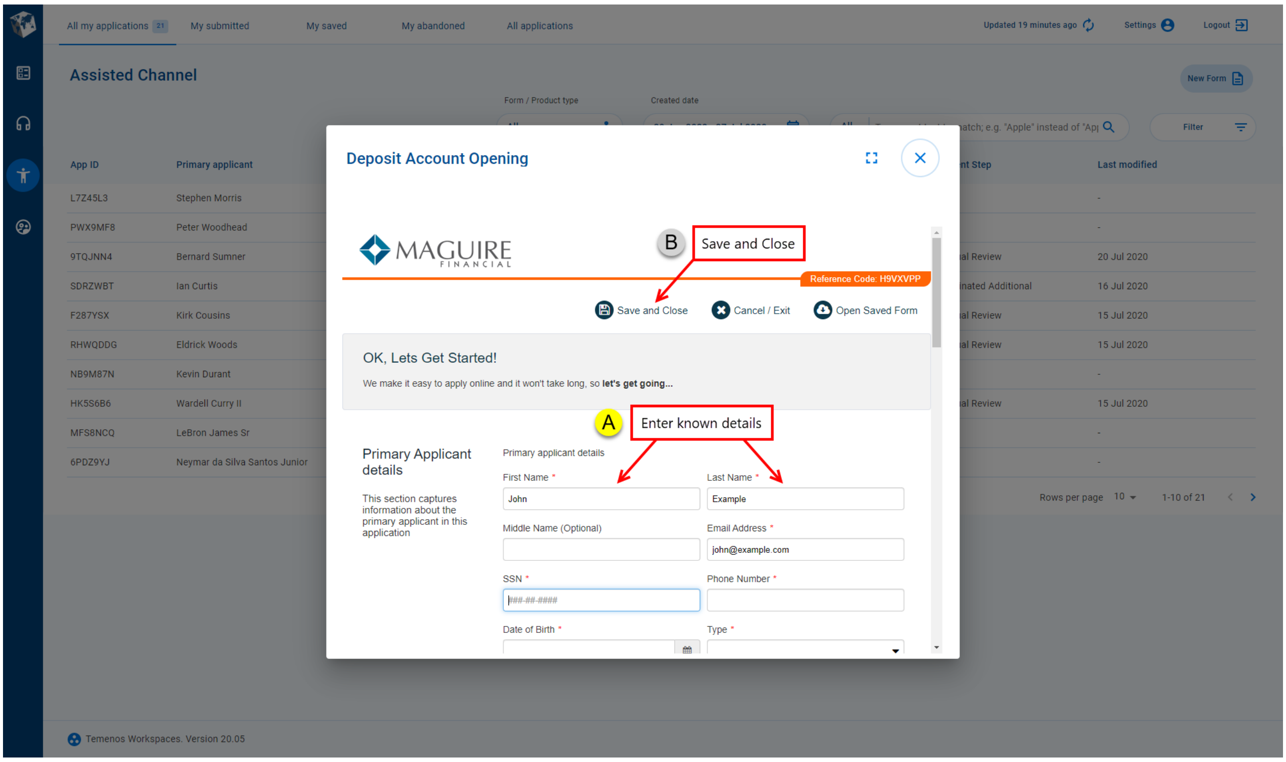
1. Login to Workspaces and select the Assisted Channel space. The List screen is displayed.



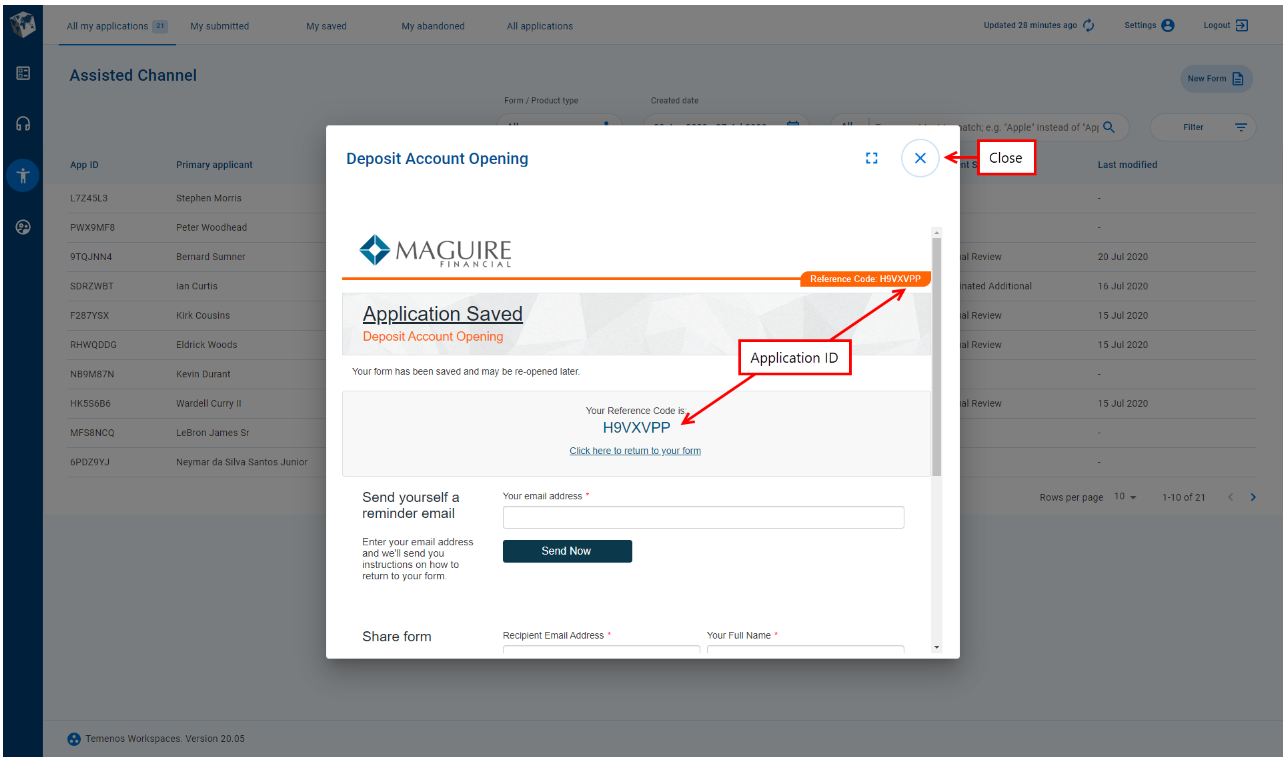

2. Click New Form, then select an item from the form / product type list. In this example, there's only a single form / product type, Deposit Account Opening, so we'll select this item.




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

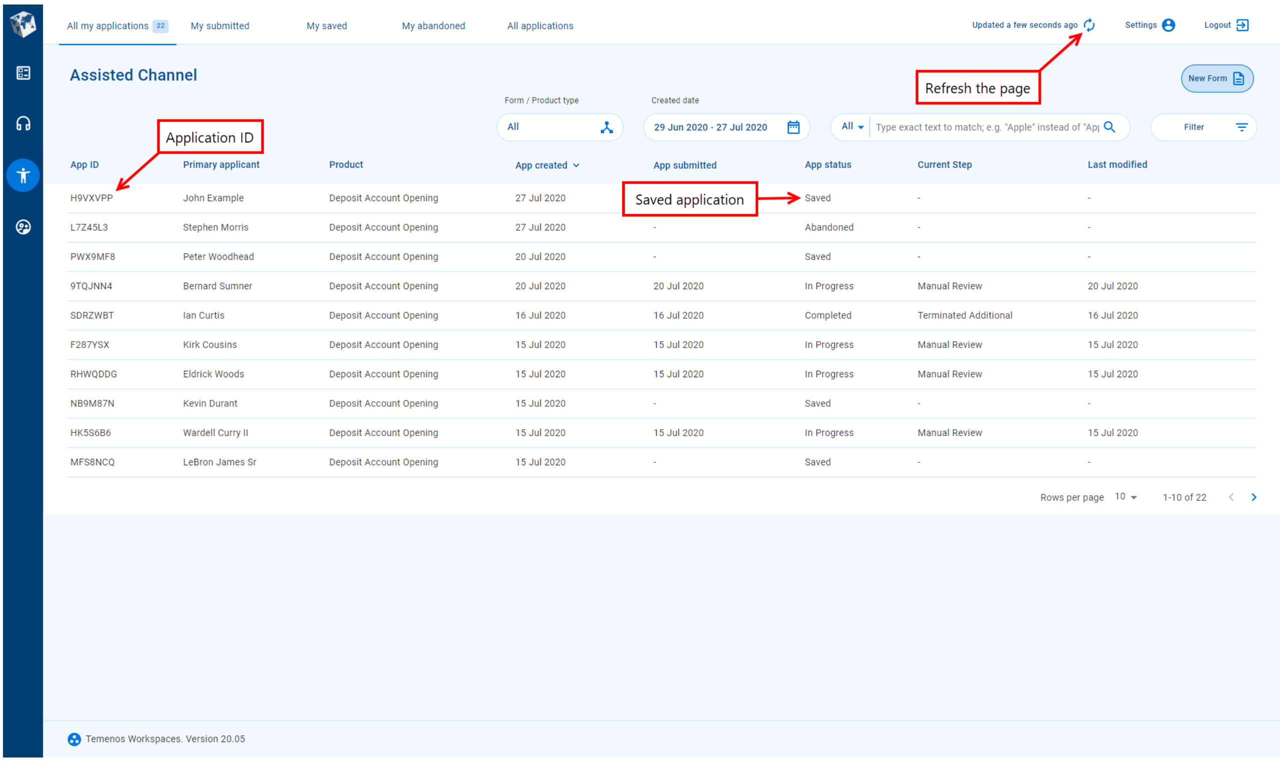



4. The application ID, "H9VXVPP", is displayed. Click closeClose to close the form and return to the List screen.




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 autorenewRefresh to refresh the

information shown on the page.

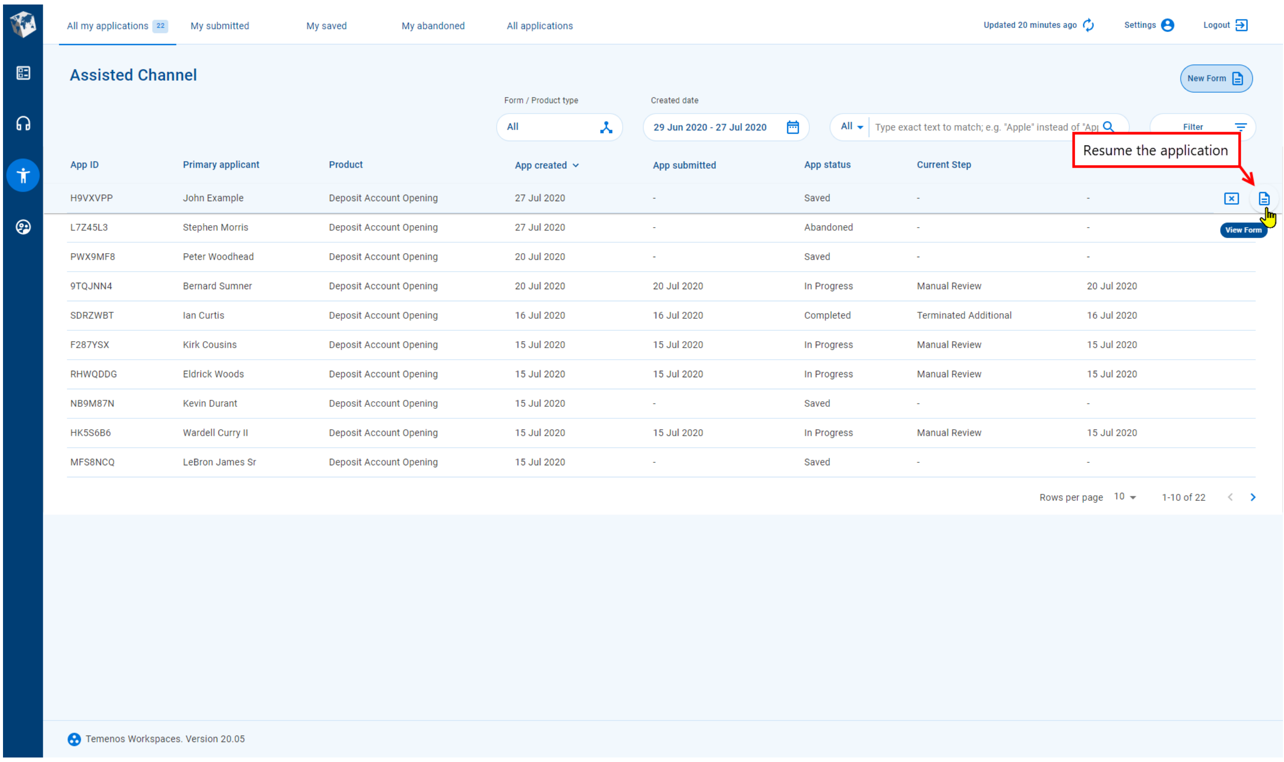



Once the application has been saved, anyone assigned to the task can use the View Form action to resume the application later. Also, if the customer has received a save confirmation email, this will include a link they can click to resume the application.

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 searchSearch 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 descriptionView 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 tasks and applications

NOTE

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

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

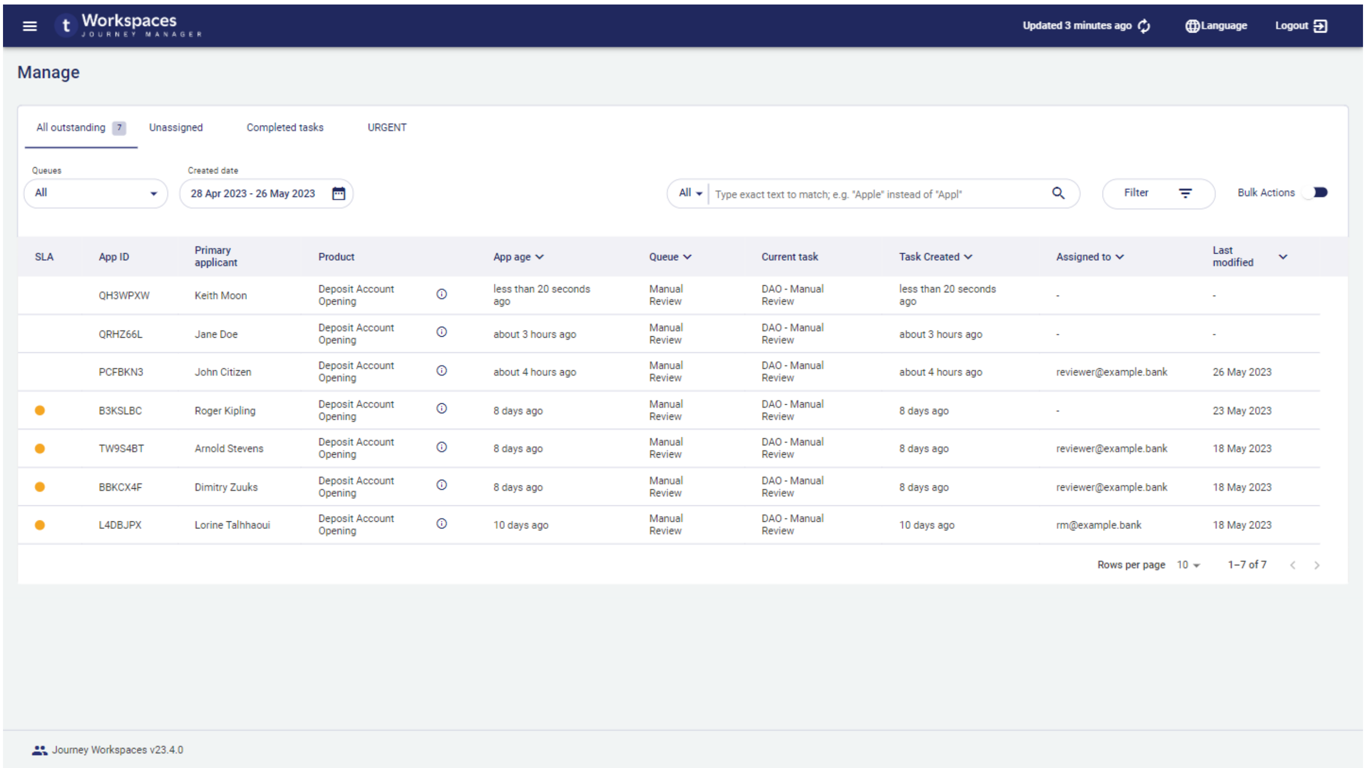
The List screen in the Manage space includes all of the standard features of a WorkspacesList screen.

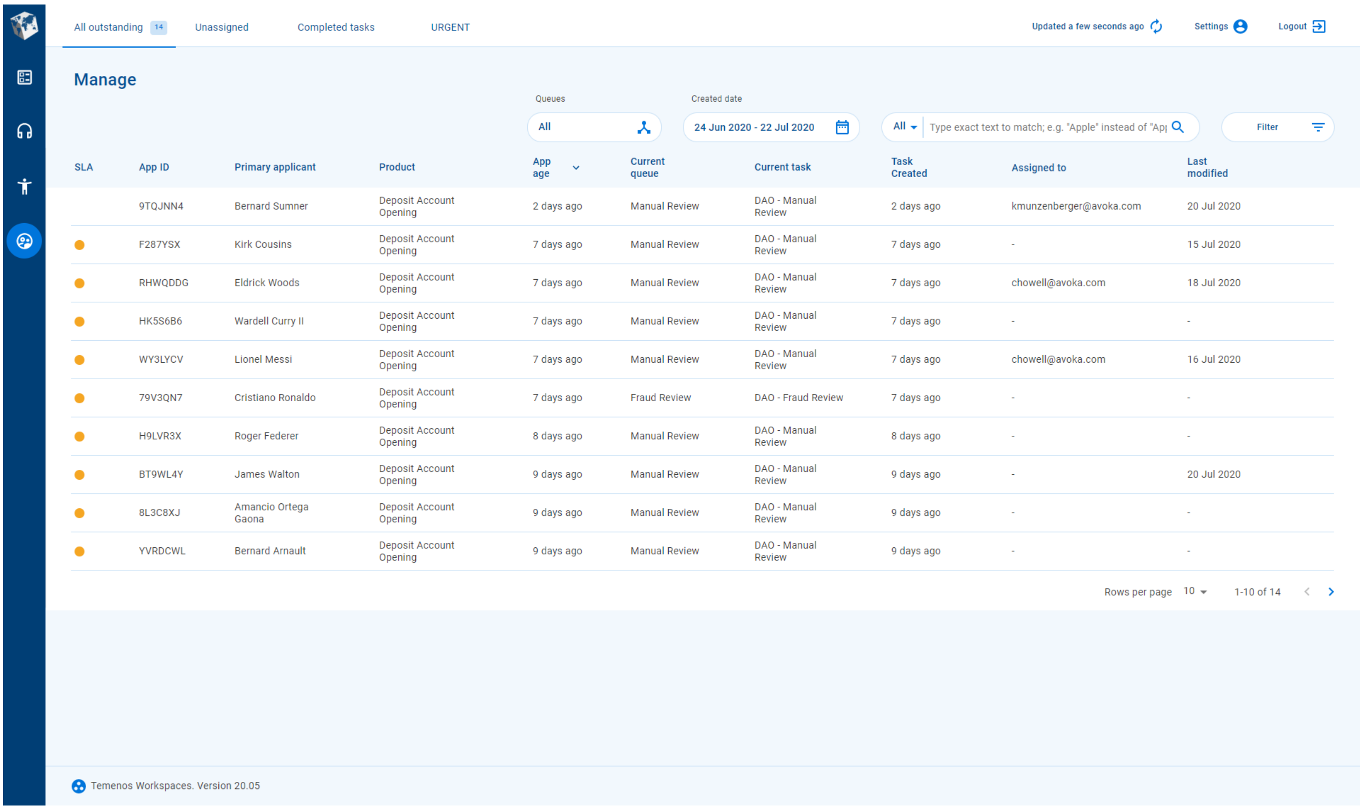
- An item list populated with tasks sourced from the active queue.
- A graphical SLA indicator that lets you monitor application progress against an SLA at a glance. 19.11This feature was introduced in the 19.11 release
- A global view selector, used to apply a pre-defined set of fields, filters and sort options to the item list.
- A global filter to select the queue that tasks are sourced from.
- A Created Date global filter 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. 22.10This feature was introduced in the 22.10 release

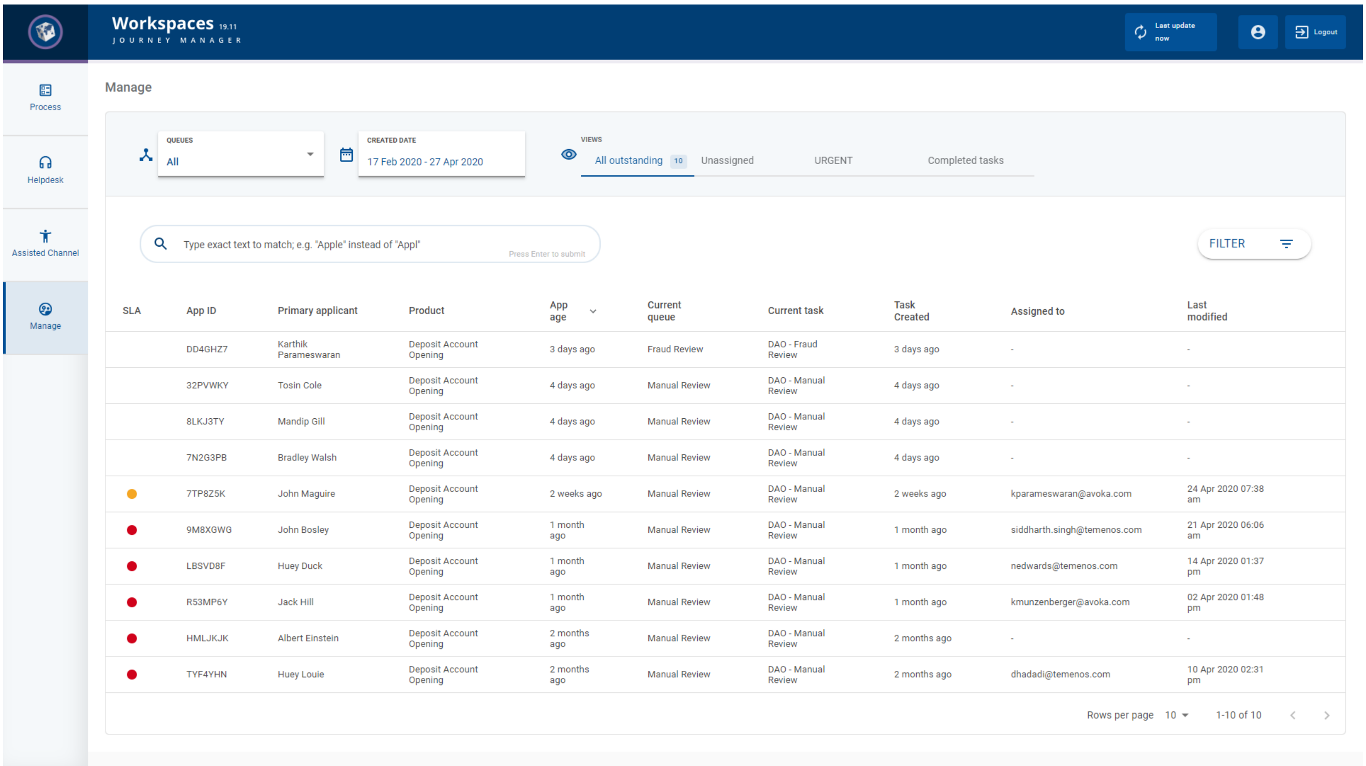
[1]A service-level agreement (SLA) is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

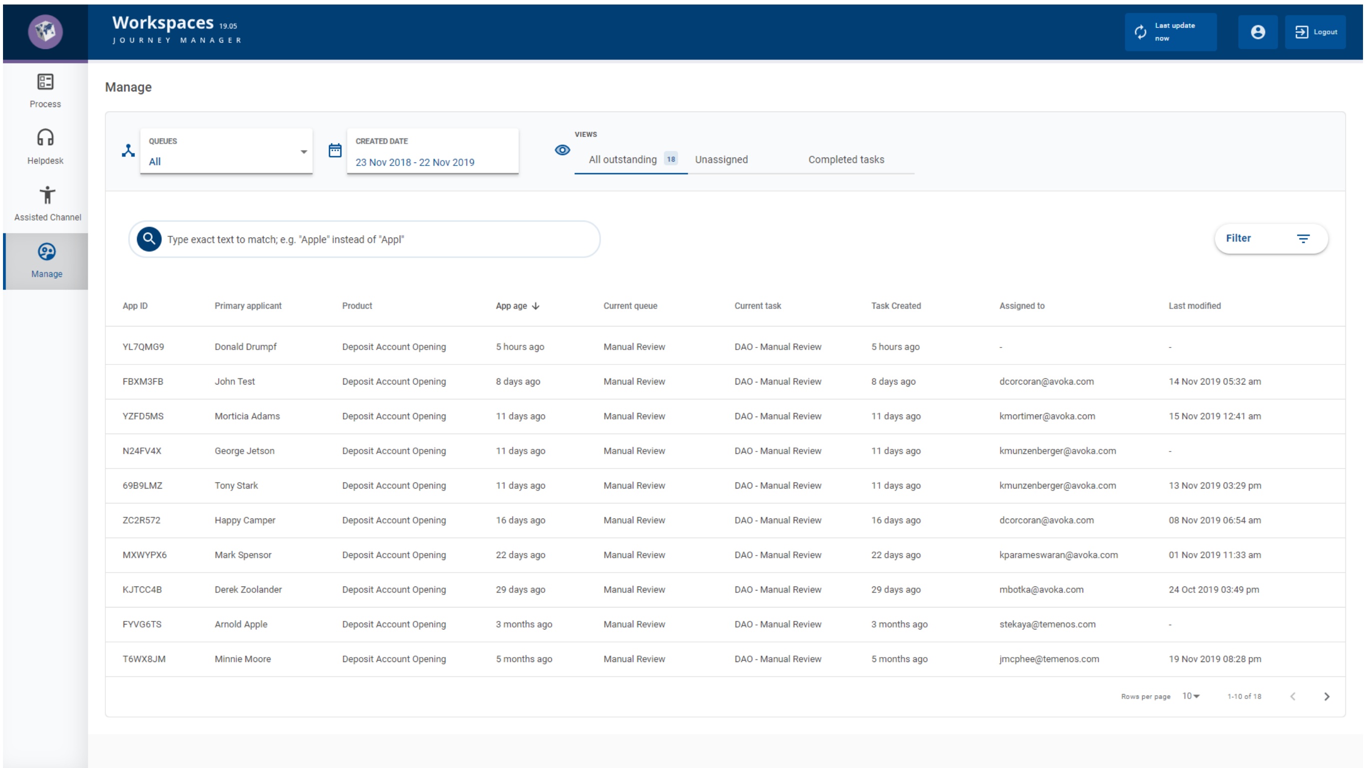
- Paging tools that allow you to browse all of the items matching your selected criteria over multiple item list pages.

- 23.04 and later
- 20.05 to 22.10
- 19.11
- 19.05




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


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



The List screen in the Manage space displays a list of tasks from the selected queue, taking into consideration the current view and any active search, filter and sort options. Each row in the item list shows information for a single task in columns including an SLA indicator that identifies how application processing is progressing against the terms of your SLA. 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.  To learn more about the item list, see Understanding the Workspaces List screen > Item list.

The items displayed satisfy global filter requirements imposed by the Created Date filter, and can be further refined using other search, filter and sort options. Searching and filtering restrict which tasks are displayed in the item list, while sorting determines the order that items appear in the list. To learn more about these options, see Search for a task or application, 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 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 an application and a selected task, and provides access to actions for managing applications. Each of the following features is contained in a separate container (pane, card or section).

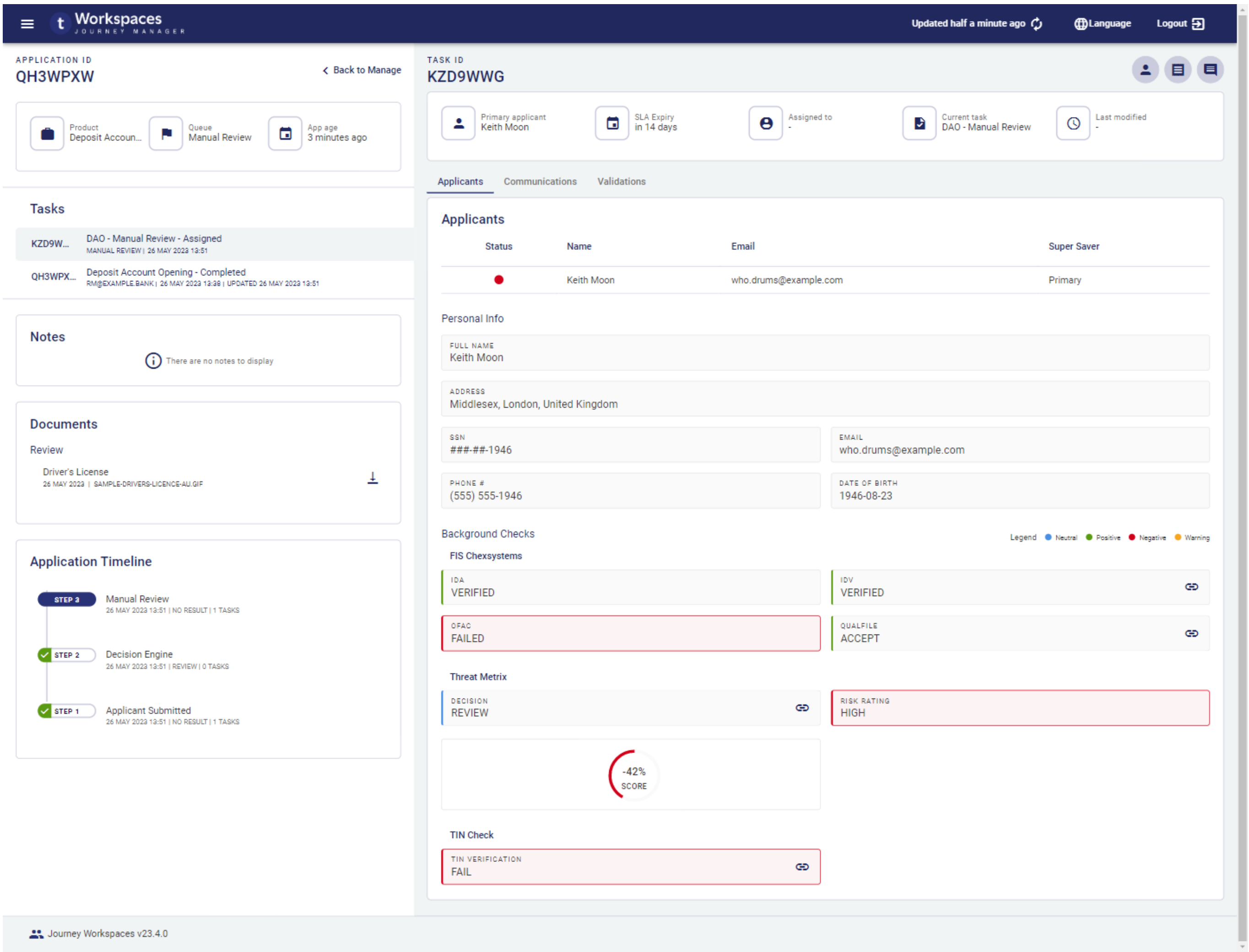
- Separate panes for application and task content. 23.04This feature was introduced in the 23.04 release
- Separate key information cards for the application and the selected task. 23.04This feature was introduced in the 23.04 release
- The ability to track application progress against an SLA.
- A task switcher showing all the application's tasks, from which you can select one to display in the Task pane. 23.04This feature was introduced in the 23.04 release
- A Notes card, bringing all notes and comments for a selected application together in a single component. Each note and its comments form a threaded conversation between the applicant and bank staff. 23.04This feature was introduced in the 23.04 release
- A collection of documents relating to the application.
- An application timeline showing the steps (tasks) that the application has progressed through. 23.04This feature was updated in the 23.04 release
- A dynamic set of actions that are applicable to the application or selected task and which are available for you to perform in the Manage space at the current stage of the application's life cycle.
- An Applicants tab, providing access to applicant data including:
  - An applicant list showing how each applicant relates to each product in the application. Select an applicant to view more details about them.
  - 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.
- A Communications tab listing emails sent to the applicant with options to view and resend.
- Options to view the details of background checks in various formats including JSON, XML, HTML, or PDF.

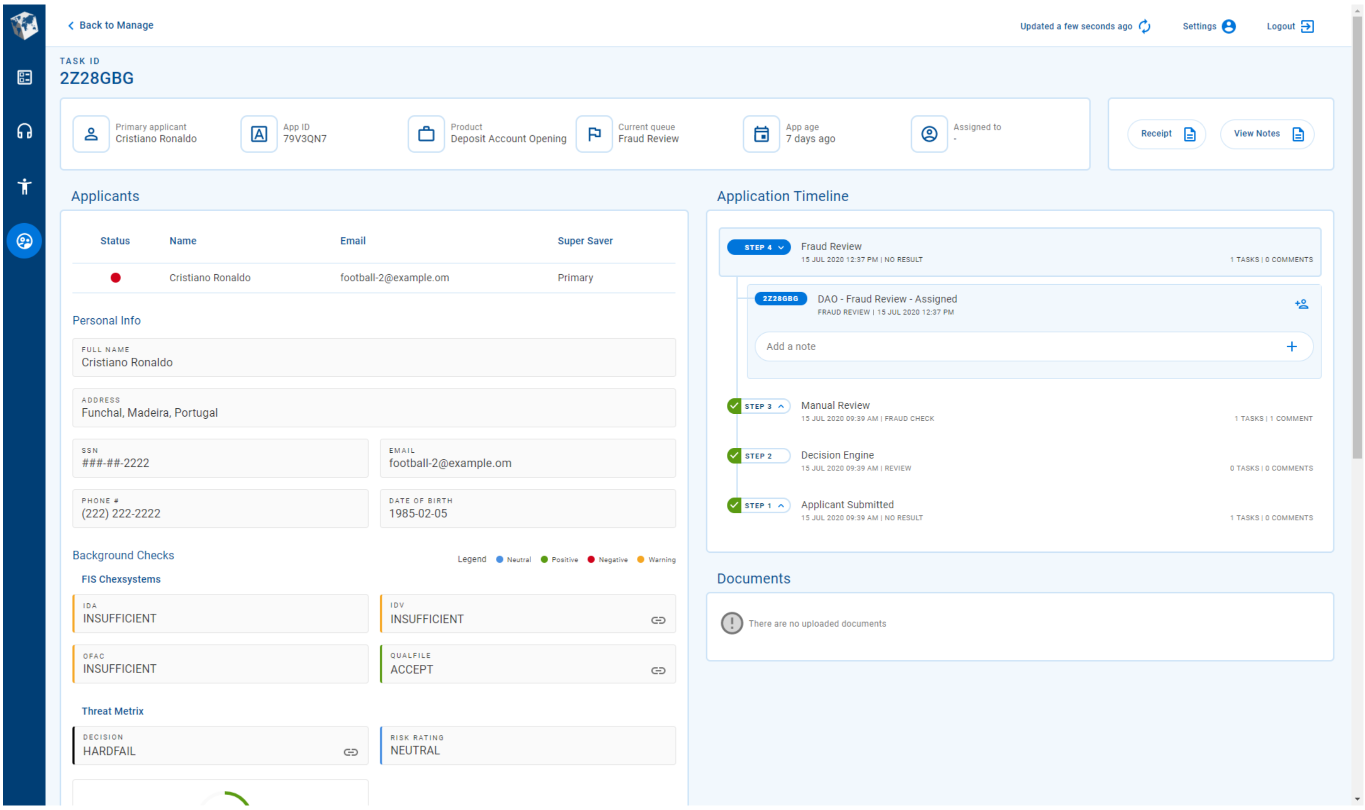
To learn about any of these features, click the links above or see The Application Details Screen if you're using Workspaces 23.04 or later and The Application Details Screen (22.10 and earlier) if you're using an earlier Workspaces release.

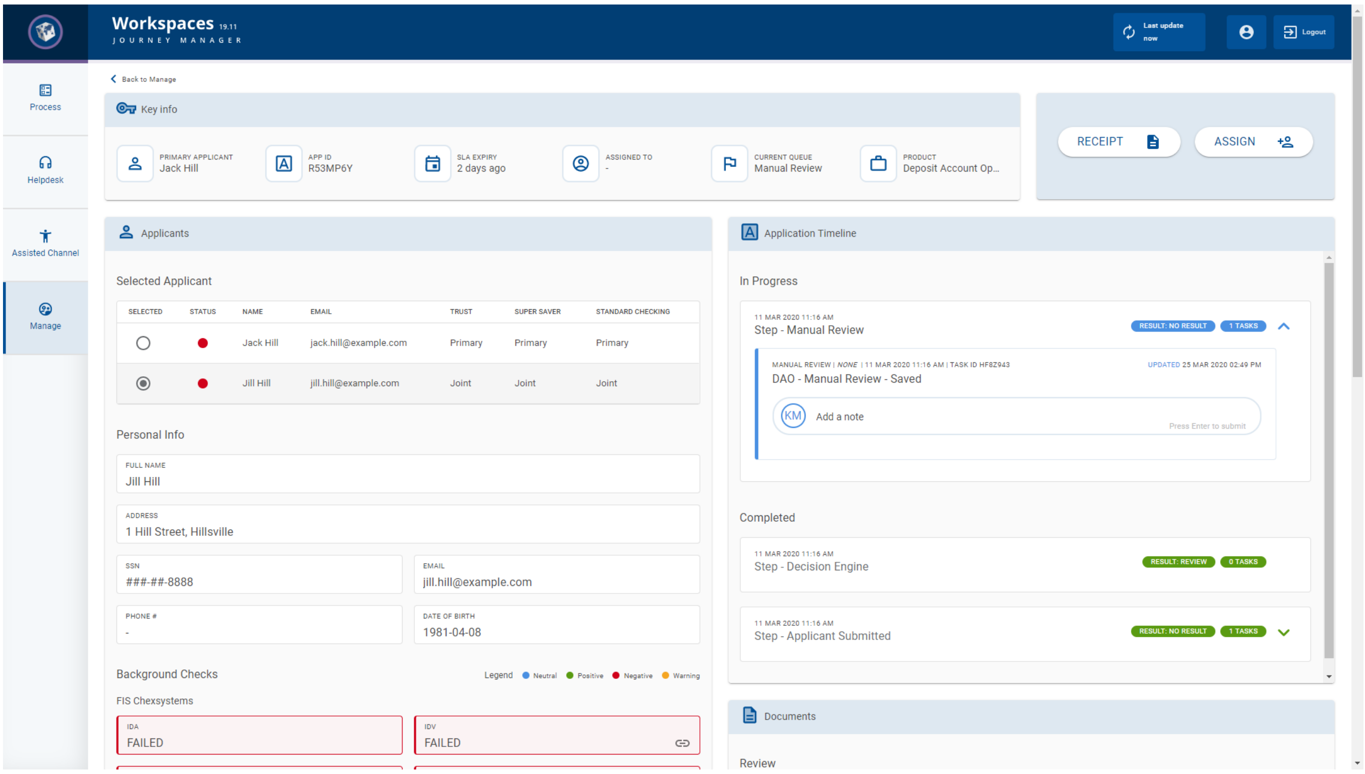
NOTE

Prior to the 23.04 release, the application timeline is an interactive component where the user can select a task, add or view notes, and perform task actions. In the 23.04 release, these interactive features have been removed from the application timeline and, instead, are available in separate components. For details, see Task switcher, Notes, and Actions.

- 23.04 and later
- 20.05 to 21.10
- 19.11 and earlier






# Actions

The following actions are available in the Manage space.

- **Add Notes**: Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **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
- **Receipt**: See a read-only view of a submitted application.
- **Share**: Obtain a URL for a Details screen relating to a specific application, task and space. 23.10This feature was introduced in the 23.10 release
- **Unassign**: Remove a task assignment for any task.
- **View Notes**: View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release

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 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.

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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.

# 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

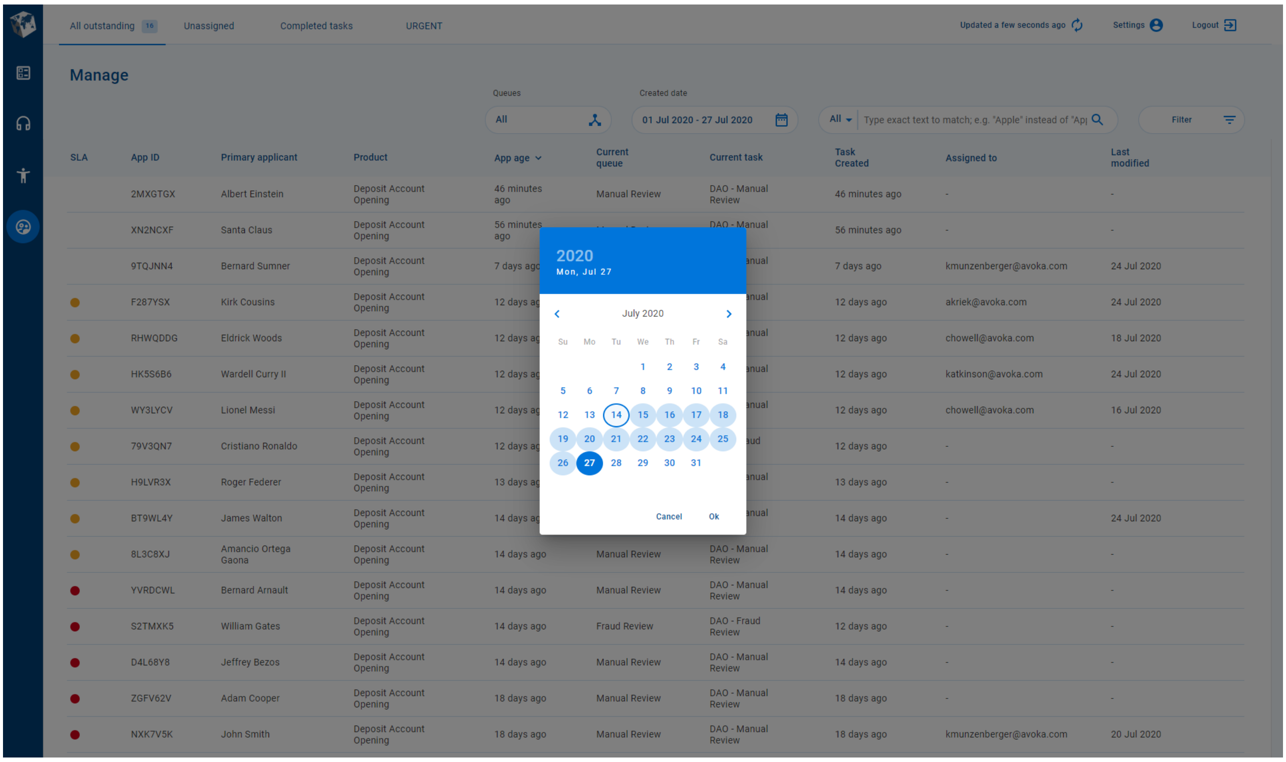
Step-by-step examples are also available for other actions that you may find useful while managing tasks.

- View a receipt on the (Helpdesk) Details screen
- View all notes for an application on the Details screen 23.04This feature was removed in the 23.04 release
- Upload a document on the Details screen

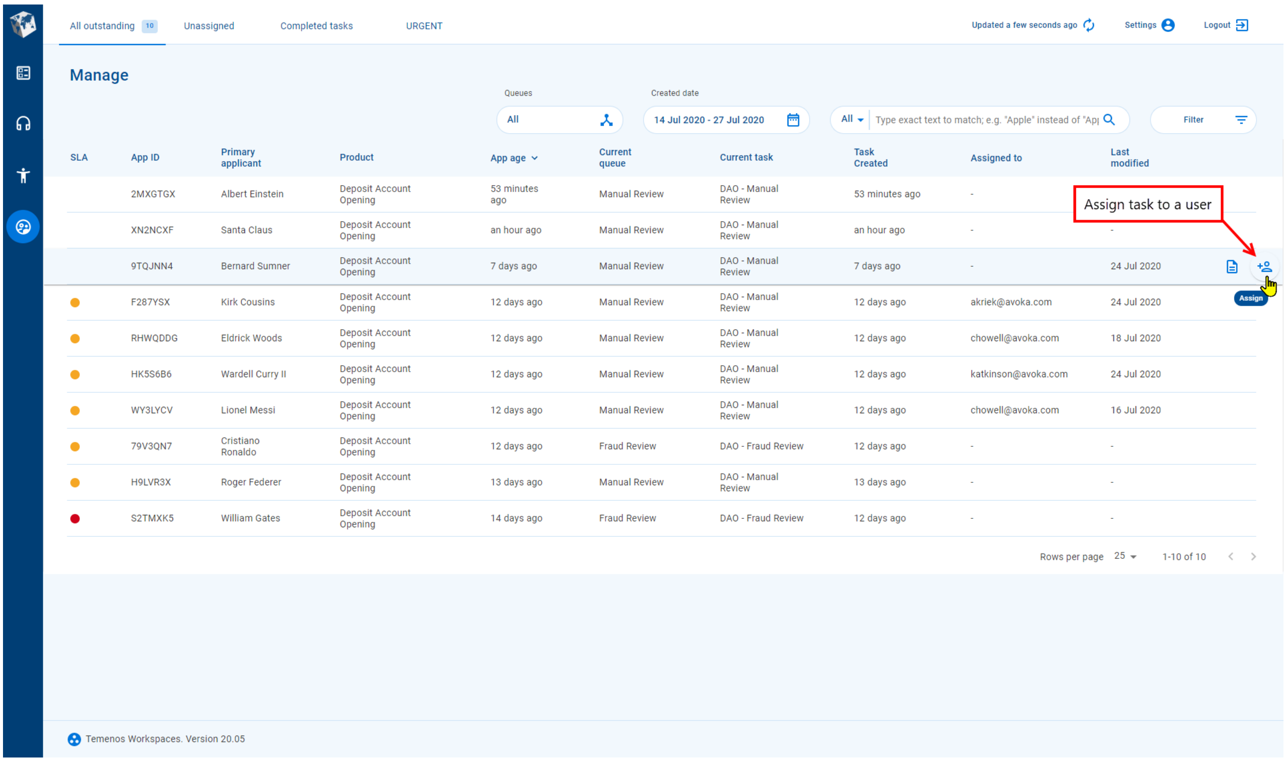
## Assign a Task

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.

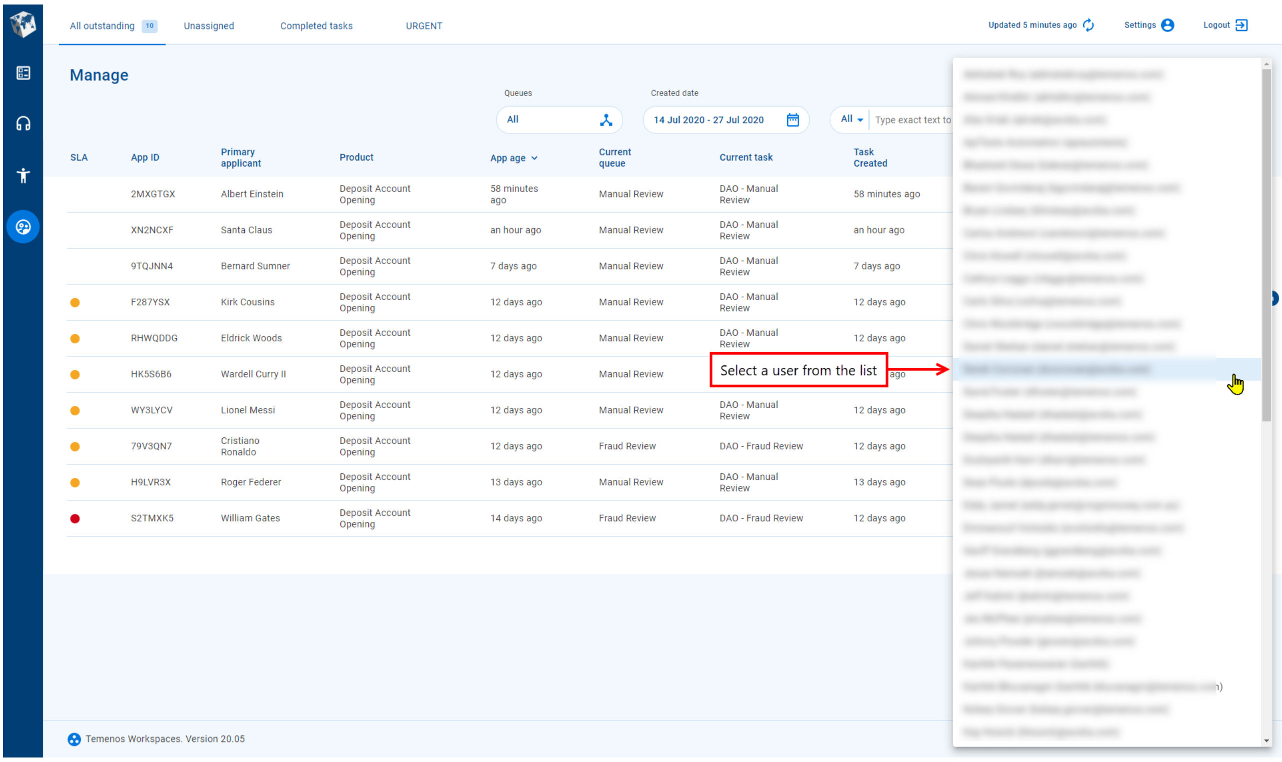
1. Login to Workspaces and select the Manage space.
2. Click Created Date and select a range of dates that covers recently submitted applications, narrowing down the list of tasks and making it easier to see the task you want to assign.



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

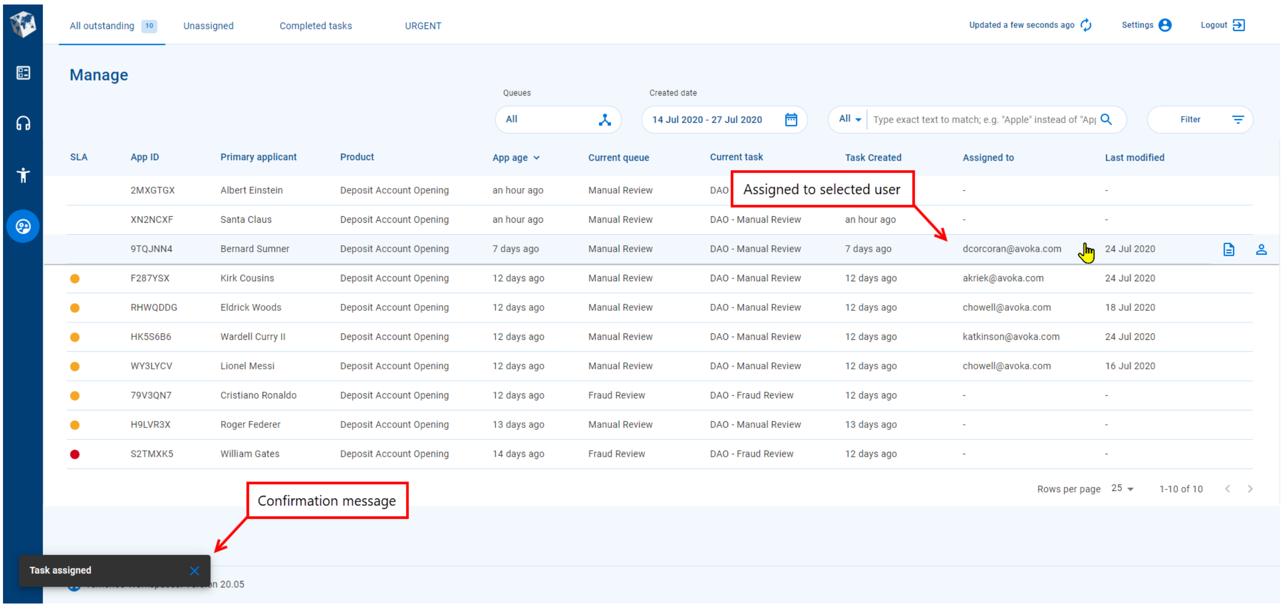


4. Select the user that you want to assign the task to from the list.




> INFO | 20.05 THIS FEATURE WAS INTRODUCED IN 20.05.
> A list of Workspaces users is displayed, showingThe 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.

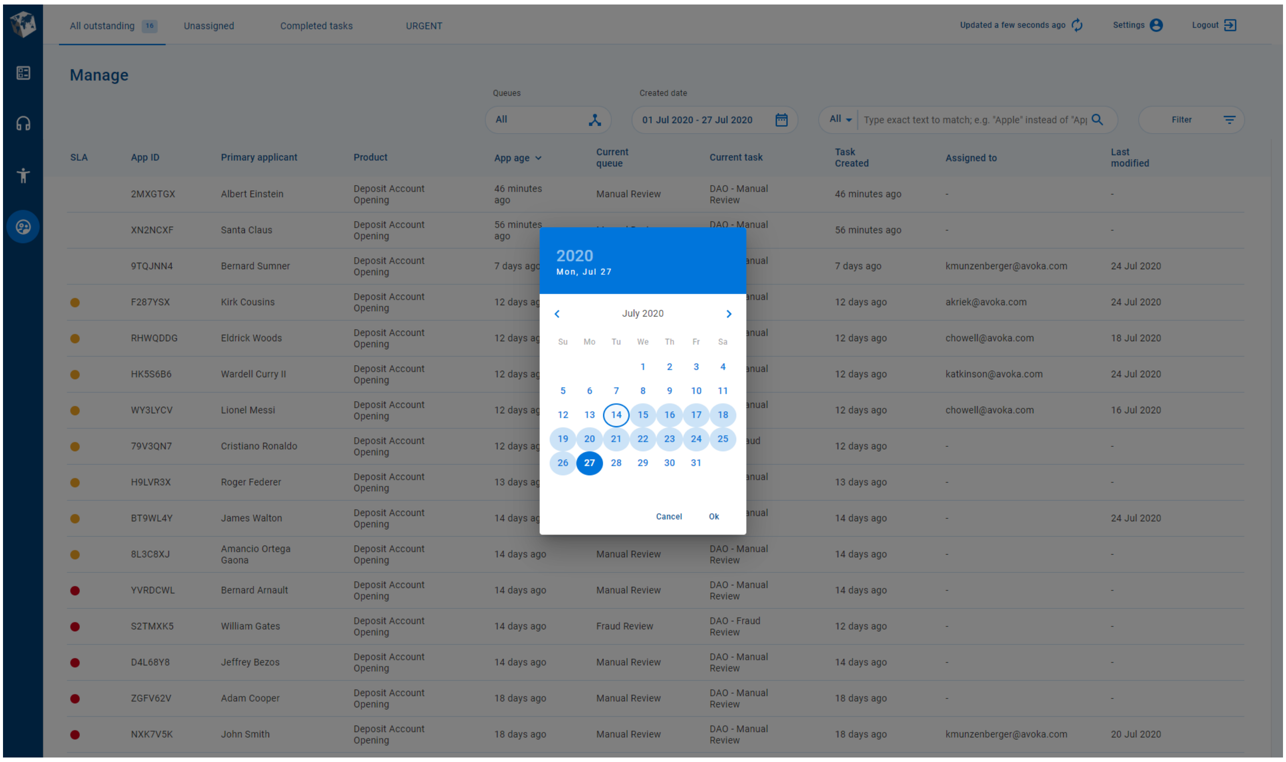



Alternatively, you can click the task to display its application details, then click Assign on the Details screen and select the user to assign the task to.

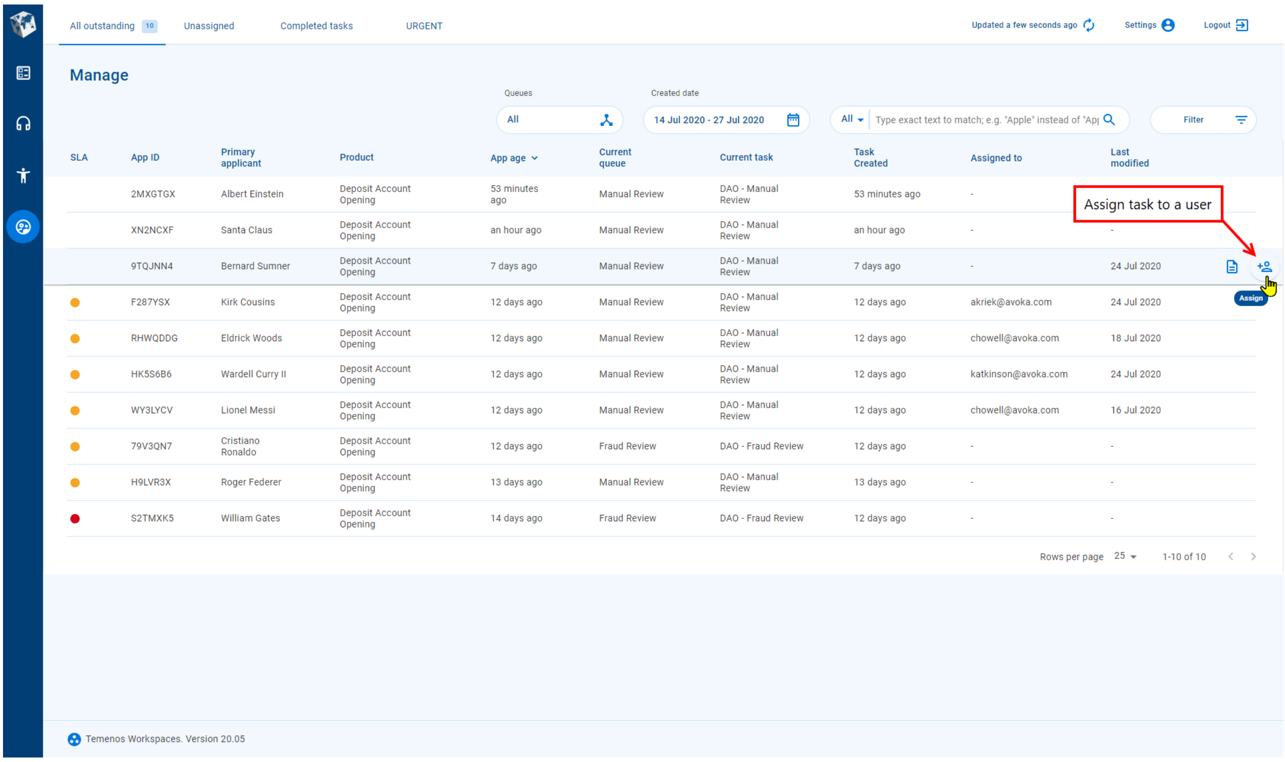
## Reassign a Task

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.

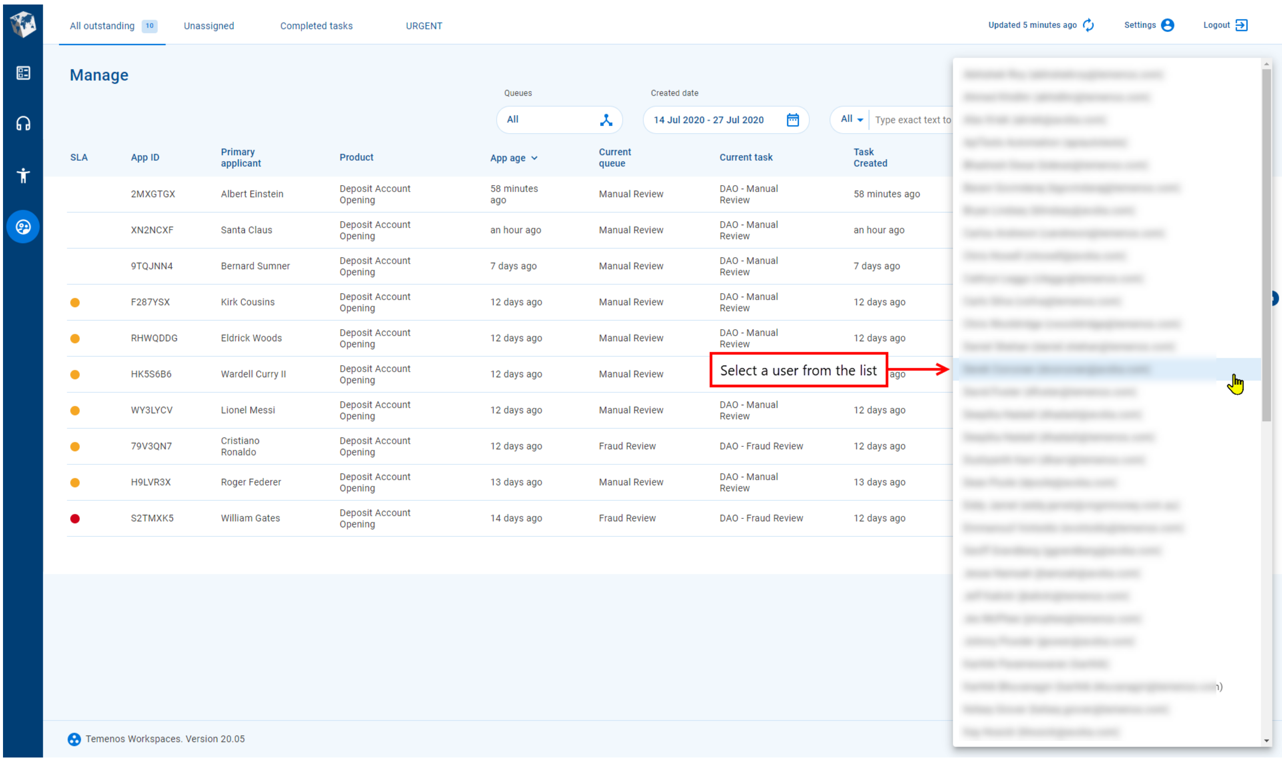
1. Login to Workspaces and select the Manage space.
2. Click Filter to open the Filters selector then enter a Workspace user id in the Assigned to field and click Apply, narrowing down the list of tasks and making it easier to see the task you want to reassign.



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

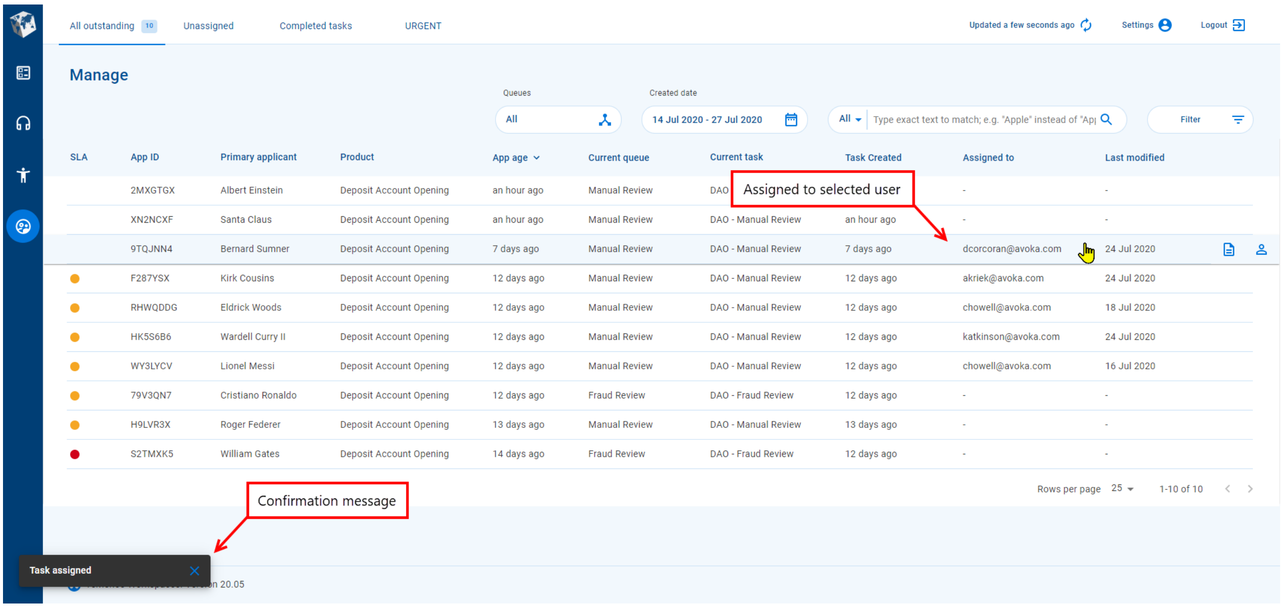


4. Select the new user that you want to reassign the task to from the list.




INFO | 20.05 THIS FEATURE WAS INTRODUCED IN 20.05.
A list of Workspaces users is displayed, showingThe 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.

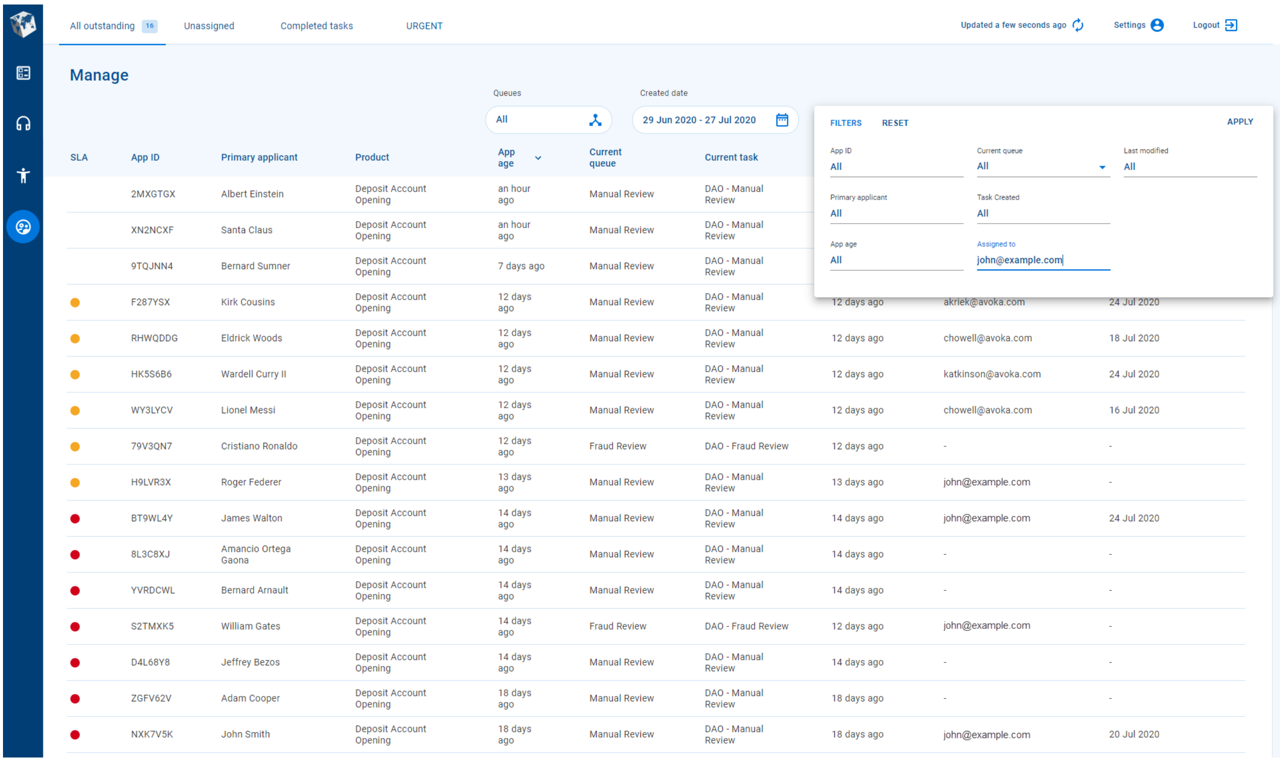



Alternatively, you can click the task to display its application details, then click Reassign on the Details screen and select the user to reassign the task to.

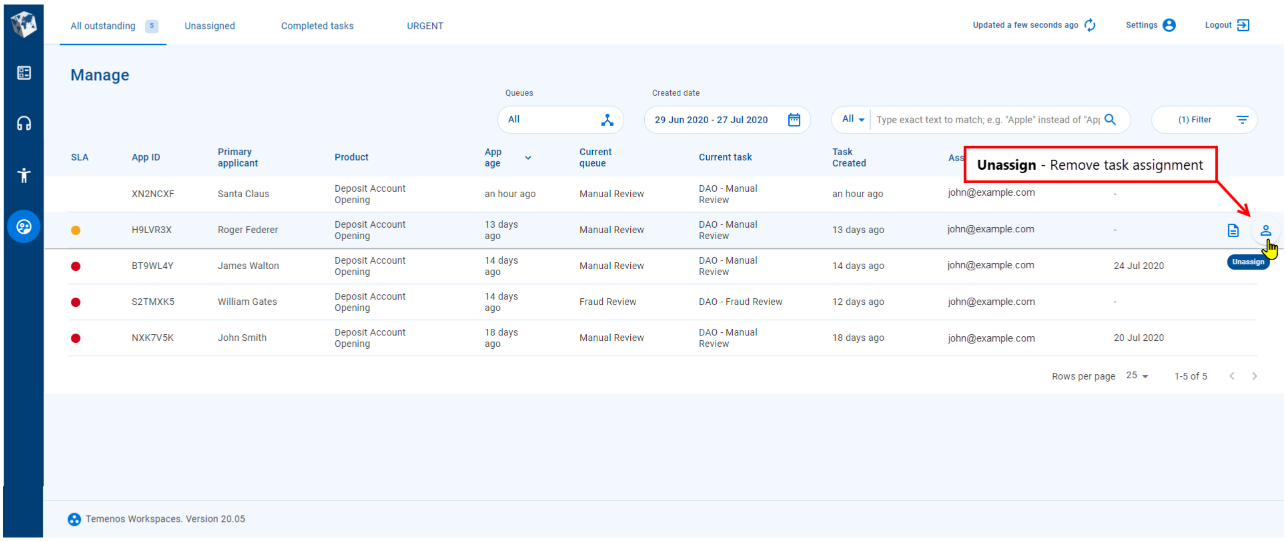
## Remove a Task Assignment

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.

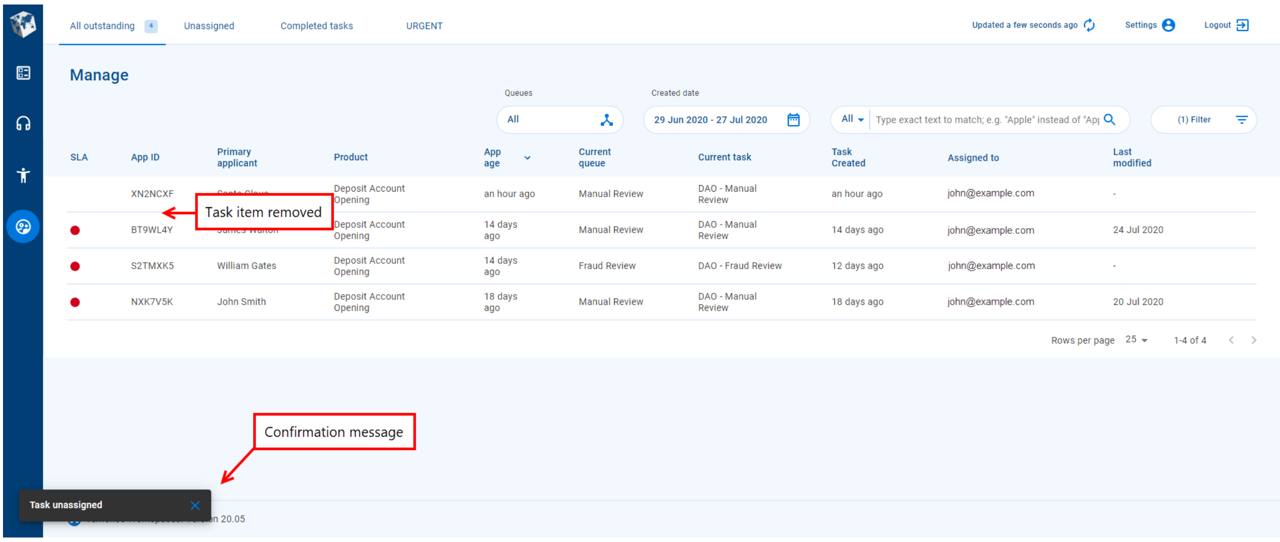



3. Select a user from the list then click outside the Filters selector twice to close it. This reduces the number of items in the item list, making it easier to see the task you want to unassign.
4. Now, you can unassign the task. Point your cursor at the task that you want to unassign – the available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

NOTE

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

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.

## Standard actions

The standard actions relating to applications are:

- **New Application:** Start a new application in the Brokers space.
- **New Form:** Start a new application on behalf of someone else.
- **Receipt:** See a read-only view of a submitted application.
- **Resume:** Re-open an application in the same form used to start the application.
- **Share:** Obtain a URL for a Details screen relating to a specific application, task and space. 23.10This feature was introduced in the 23.10 release
- **View Notes:** View all notes recorded against all of an application's tasks. 20.05This feature was introduced in the 20.05 release 23.04This feature was removed in the 23.04 release

The standard actions relating to tasks are:

- **Add Notes:** Add notes (and comments) against an application's tasks. 23.04This feature was introduced in the 23.04 release
- **Assign:** Assign a task to a Workspaces user.
- **Claim:** Assign a task to yourself.
- **Decision:** Take a decision that progresses a task along its application journey.
- **Reassign:** Assign an assigned task to another user. 22.10This feature was introduced in the 22.10 release
- **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. 19.11This feature was introduced in the 19.11 release
- **Release**: Remove a task assignment for a task assigned to you.
- **Unassign**: Remove a task assignment for any task.
- **View Form**: Open an application that has been saved but not yet submitted in the original form.
- **Withdraw**: Cancel an application that has been saved but not yet submitted. 19.11This feature was introduced in the 19.11 release

INFO

In Workspaces 23.04 and later releases, the View Notes action is replaced with Show All in the Notes card. To learn more, see The Application Details screen > Notes.

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

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

The 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.

Additional custom functionality may occur as part of performing a standard action. The custom functionality occurs only if the action is successful. How you experience the custom functionality is specific to your Workspaces portal. For example, you could receive a personalized email after an action is performed. This feature the release

Custom functionality is added to an action via configuration. To learn about adding custom functionality to a standard action, see Configuration > Current space configuration > Invoke.

### Standard action availability

In the default configuration, the following standard actions are available for all releases and in all spaces except as noted.

- Receipt
- Share (Review, Helpdesk, Assisted Channel, Manage spaces) 23.10This feature was introduced in the 23.10 release
- Add Notes (All spaces except Document Requests) 23.04This feature was introduced in the 23.04 release
- View Notes 23.04This feature was removed in the 23.04 release

Also, the Notes card > Comments core function is always available even when the Add Notes action is not. 23.04This feature was introduced in the 23.04 release

For the spaces in the default configuration, the following standard actions are also available:

- Review: Claim, Decision, Release
- Helpdesk: Recover, View Form, Withdraw
- Assisted Channel: New Form, Recover, View Form, Withdraw
- Manage: Assign, Reassign, Unassign

The Receipt action is available for submitted applications in all spaces, while the View Form action is available for saved applications in the Helpdesk and Assisted Channel spaces. This means you can always see the information in an application regardless of the application's state and which space you're in.

In Workspaces 22.10 and earlier releases, 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 can help you understand an application's progress. View Notes is replaced by Add Notes in Workspaces 23.04 (and later releases).

Only Assisted Channel users can kick-off new applications using the New Form action, but any application started this way can be claimed by or assigned to another user subsequently.

The standard actions available in other spaces are as follows.

- Brokers: New Form, Recover, Resume, Withdraw

Resume is a new action introduced for the Brokers space and is only available in that space. Resume is equivalent to View Form in Workspaces.

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

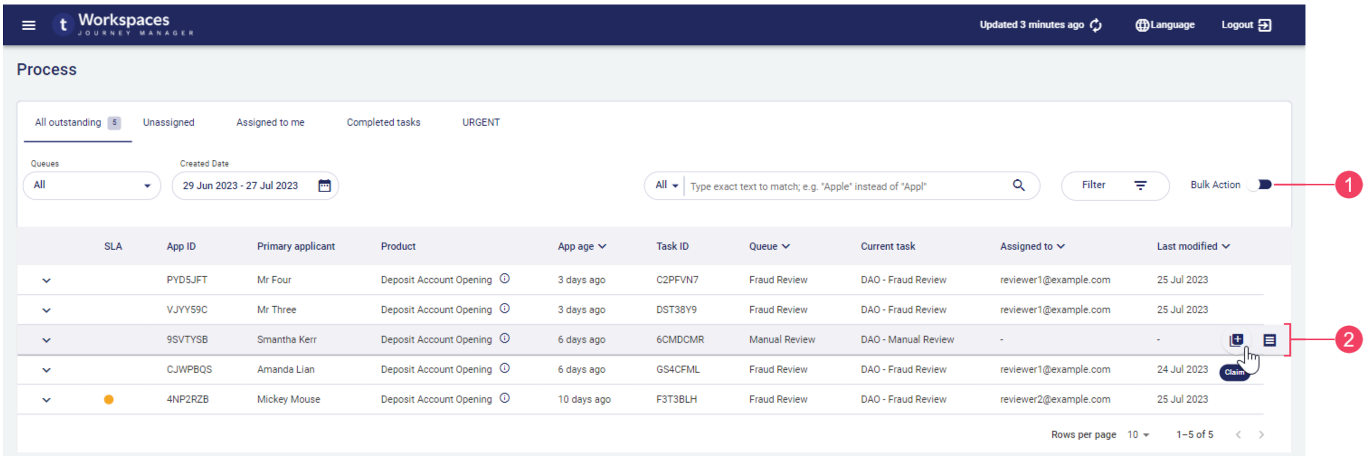
All of these factors work together with space-based access control to determine whether an action is available for a task or application as the application progresses through its life cycle. For more information about how spaces are used to control what actions you can perform, see Access control.

### Performing standard actions

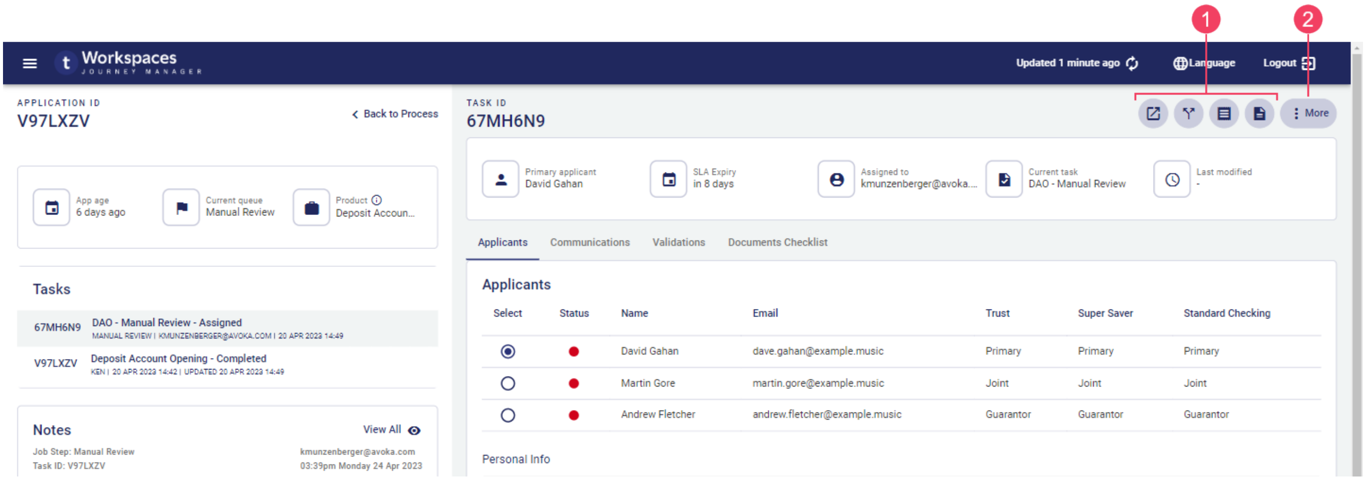
Standard actions can be performed from any List screen or Details screen. On a List screen, actions are accessed via icon buttons on the right-hand side of each item in the item list. On a Details screen, actions are accessed via the buttons in the actions group located in the top-right of the Task pane. From the List screen, you can also use the Bulk Action feature to perform multiple standard actions at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

> INFO
>
> In Workspaces 23.04, task actions are consolidated with application actions in the actions group. In earlier releases, task actions were accessed via icon buttons on each task in the application timeline.


- List screen
- Details screen



1. Bulk action
2. Standard action buttons



1. Standard action buttons
2. Custom action button

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 no actions are available, this is indicated by displaying the infoNone icon instead of the action buttons.

To perform a standard action, click the action button corresponding to the desired action. Most standard actions will display a brief message in the bottom-left corner of the screen confirming that the 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.

INFO

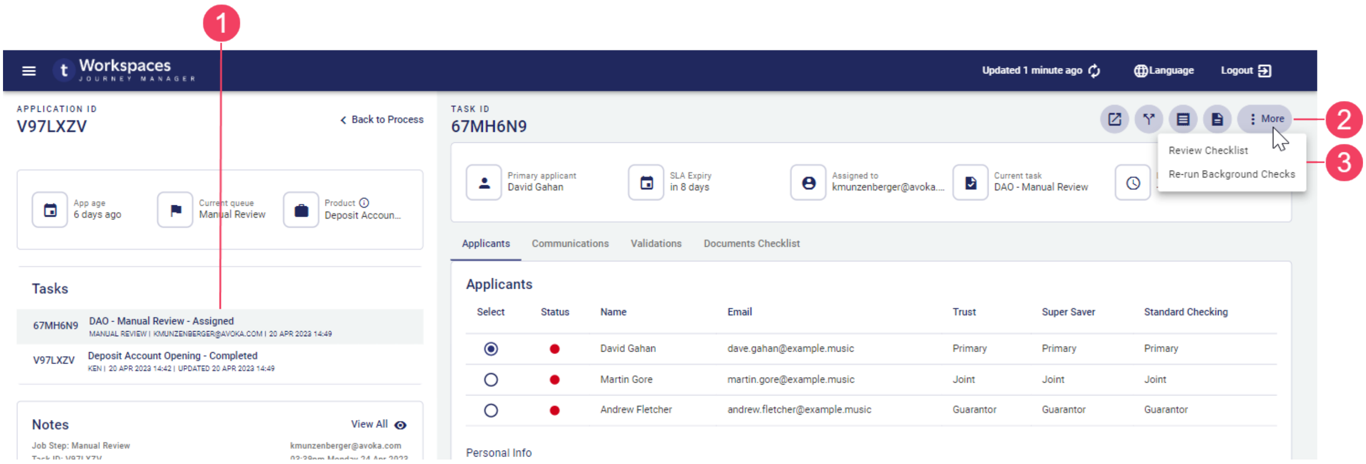
There are no custom actions in the default Workspaces configuration. Any available custom actions, and what they do, are specific to your Workspaces portal and are not covered by this documentation.

A custom action 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.

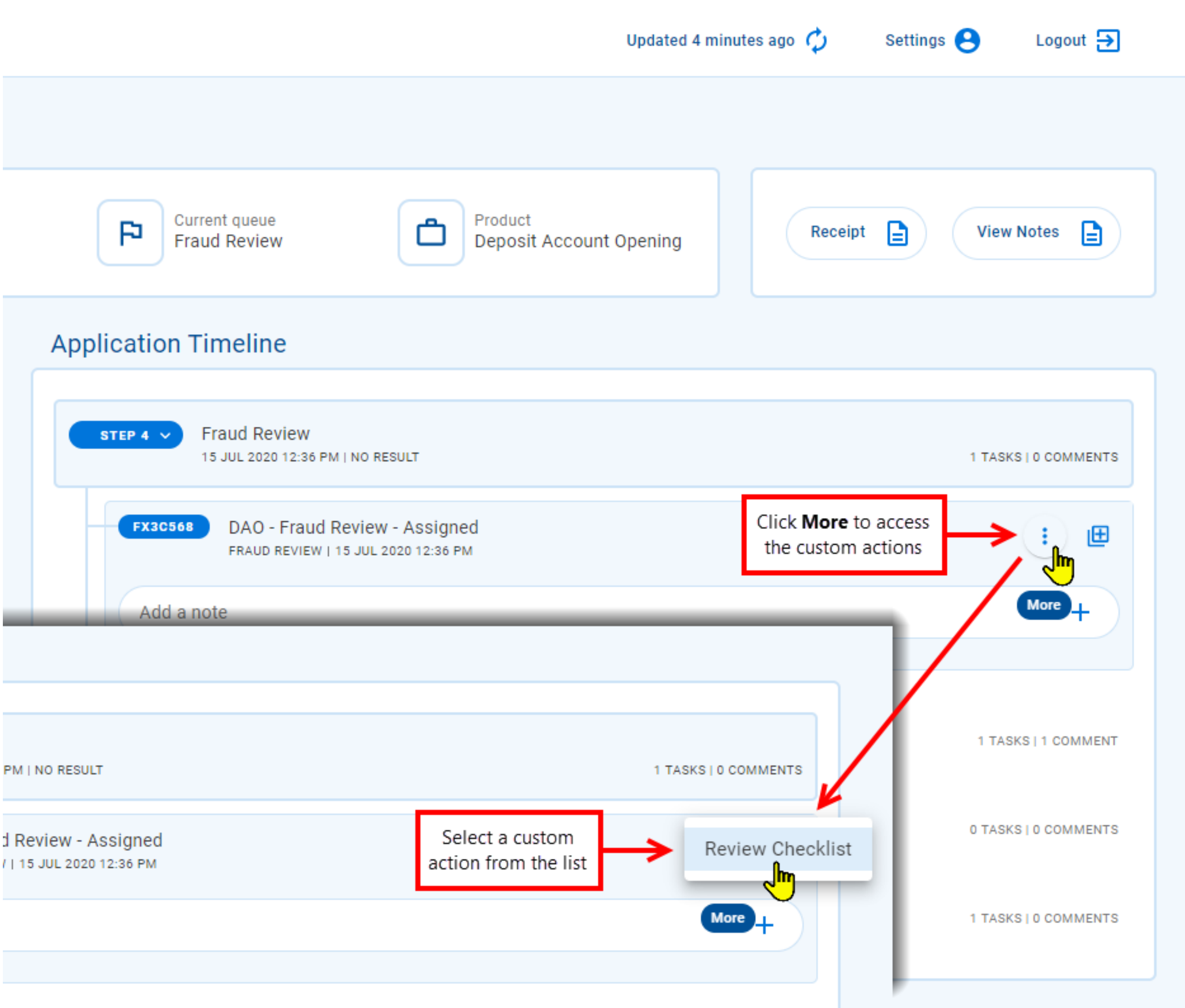
To perform a custom action:

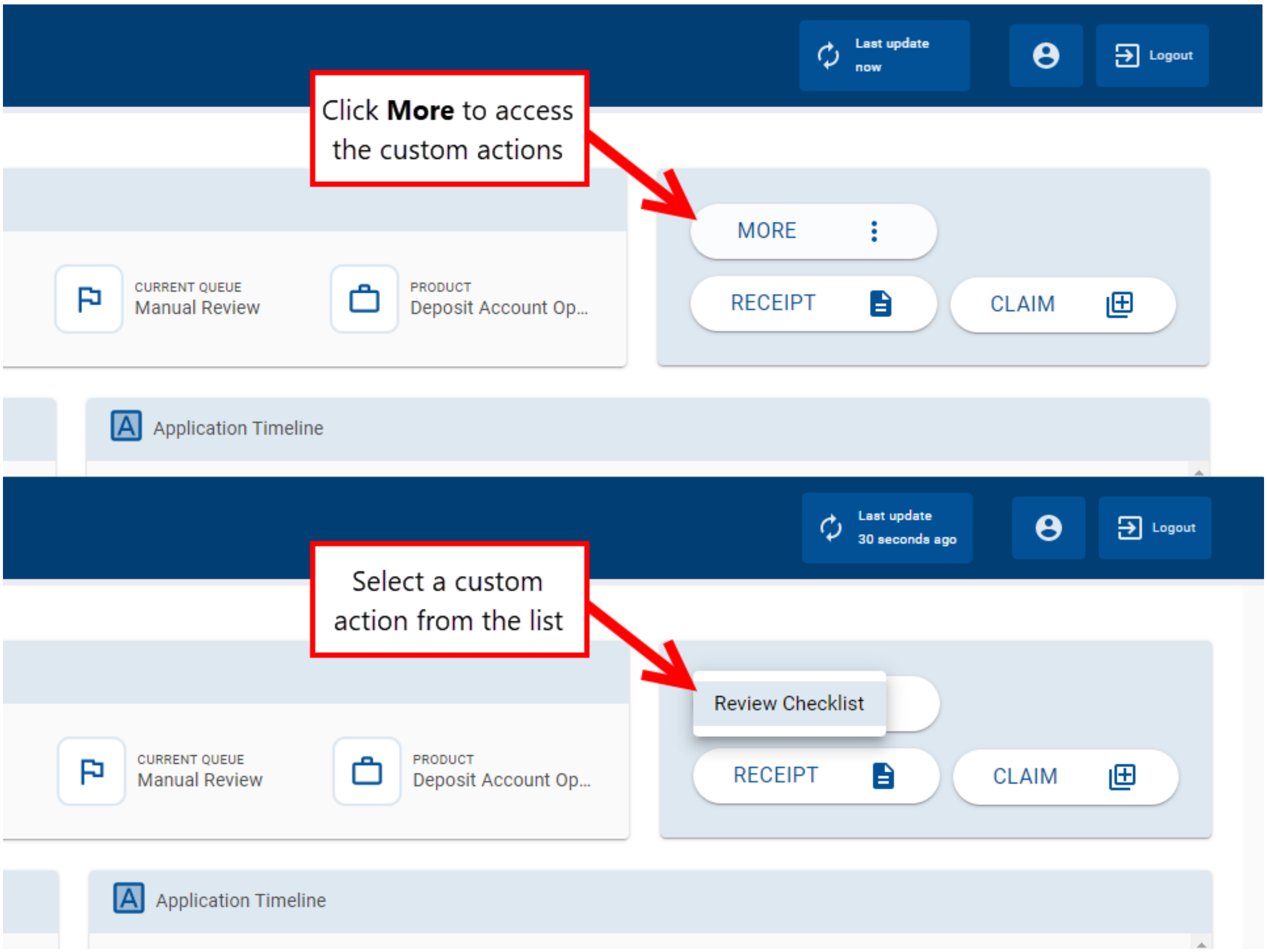
1. On a List screen, select a task from the item list. The corresponding Details screen is displayed, showing details for the selected task.
2. Click to display the list of available custom actions.
   - **23.04 and later:** is located in the action group, in the top-right of the Task pane.
   - **20.05 to 22.10:** is specific to each task in the application timeline.
   - **Prior to 20.05:** 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.
4. 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.
5. Once the custom behavior is complete, Workspaces refreshes the screen.

- 23.04 and later
- 20.05 to 22.10
- Prior to 20.05




1. Selected task
2. More button
3. More menu




Last update now
Logout
Click **More** to access the custom actions
MORE
RECEIPT
CLAIM
CURRENT QUEUE
Manual Review
PRODUCT
Deposit Account Op...
Application Timeline
Last update 30 seconds ago
Logout
Select a custom action from the list
Review Checklist
RECEIPT
CLAIM
CURRENT QUEUE
Manual Review
PRODUCT
Deposit Account Op...
Application Timeline

# Bulk actions in Workspaces

NOTE

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

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.

INFO

Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

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
- **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. 19.11This feature was introduced in the 19.11 release
- **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. 19.11This feature was introduced in the 19.11 release

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

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 a List screen or a Details screen.

## Assign from a List screen

To assign a task to a user from a List screen :

1. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to assign and point your cursor at it. The available actions appear at the right-hand side.

---

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

3. Click person_addAssign. A list of Workspaces users is displayed, showing 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 column.

TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

You can use the Bulk Action feature to assign multiple tasks at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

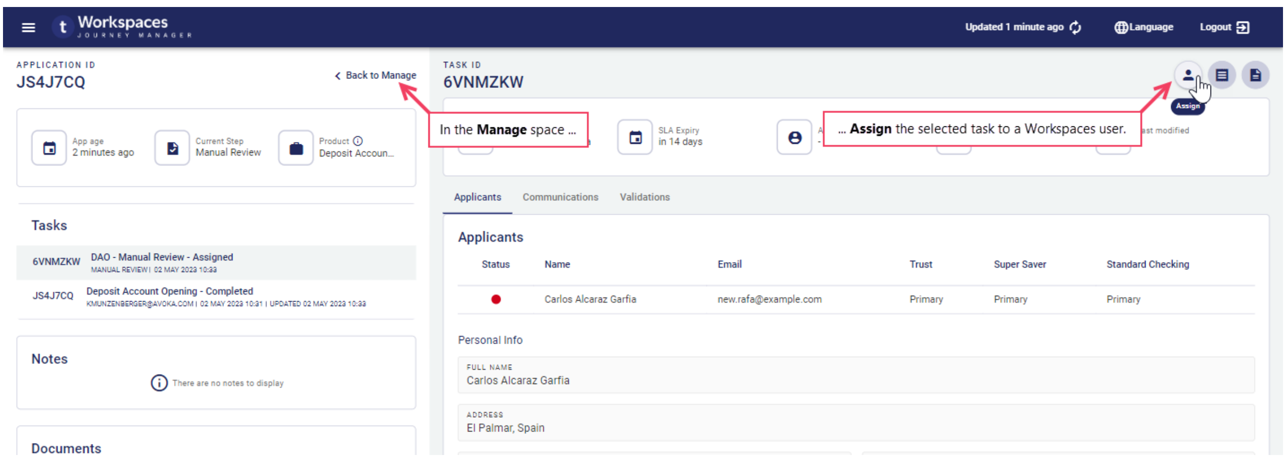
## Assign from a Details screen

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

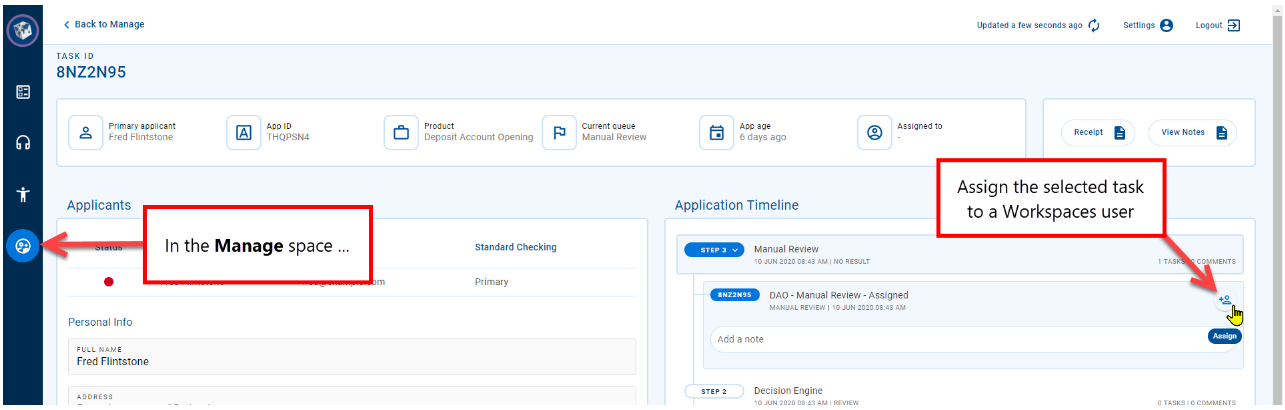
1. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to assign and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click person_addAssign. A list of Workspaces users is displayed, showing both the Workspaces user id and the full name for each user.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

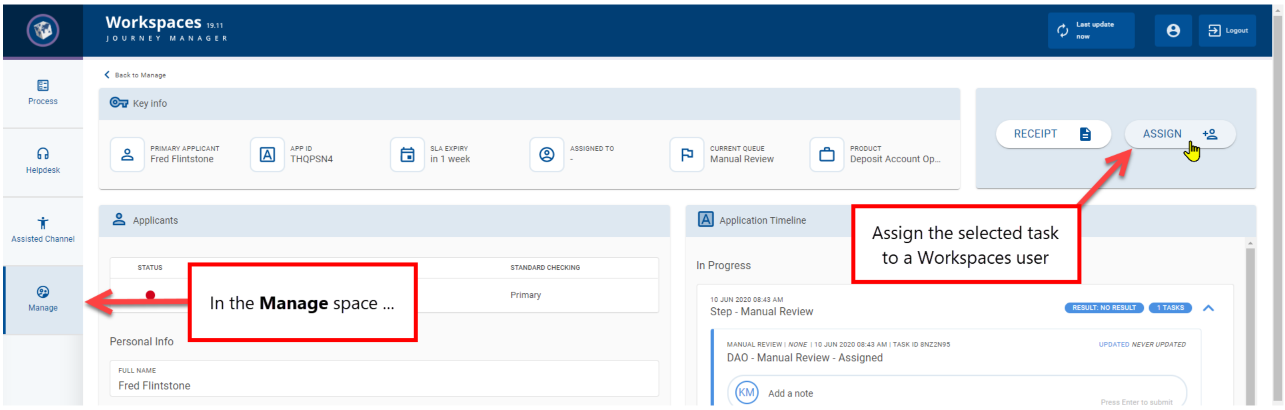
   person_addAssign is located in the Actions group.

   person_addAssign is located within the selected task in the application timeline.




The Assign button is located 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 a yourself

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 a task.

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 a 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 Review or Helpdesk space from either a List screen or a Details screen.

## Claim from a List screen

To claim a task from a List screen :

1. From the Spaces navigation menu, select the Review or Helpdesk space. The List screen is displayed.
2. In the item list, locate a task that you want to claim and point your cursor at it. The available actions appear at the right-hand side.
3. Click library_addClaim. The task is assigned to you, and your Workspaces id is displayed in the Assigned column.

TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

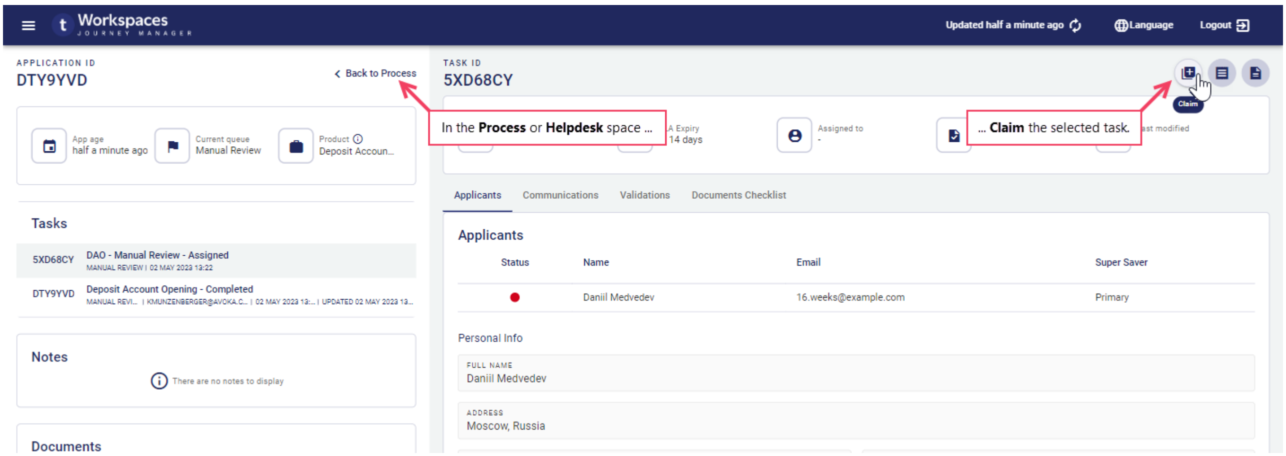
You can use the Bulk Action feature to claim multiple tasks at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

## Claim from a Details screen

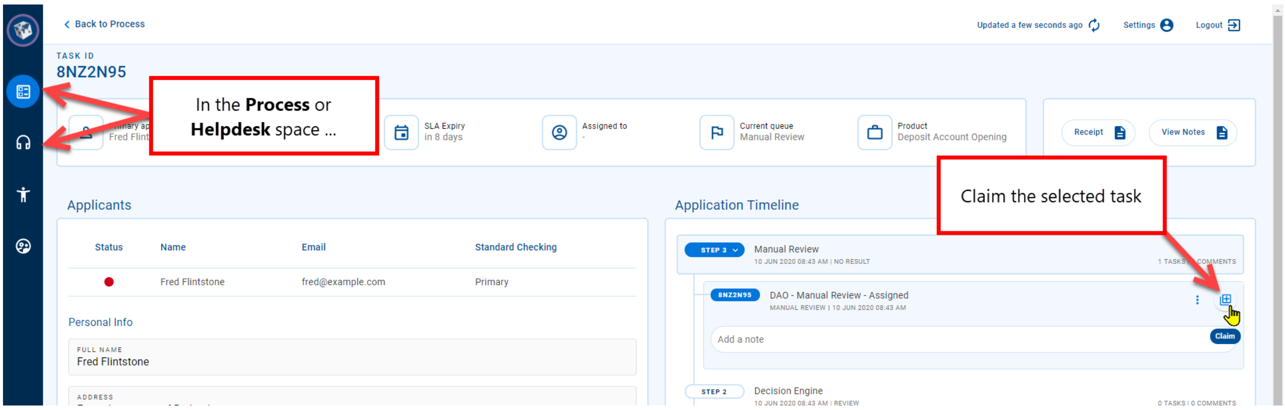
To claim a task from a Details screen :

1. From the Spaces navigation menu, select the Review or Helpdesk space. The List screen is displayed.
2. In the item list, locate a task that you want to claim and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click library_addClaim. The task is assigned to you, and your Workspaces id is displayed in the Assigned to field in the key information.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

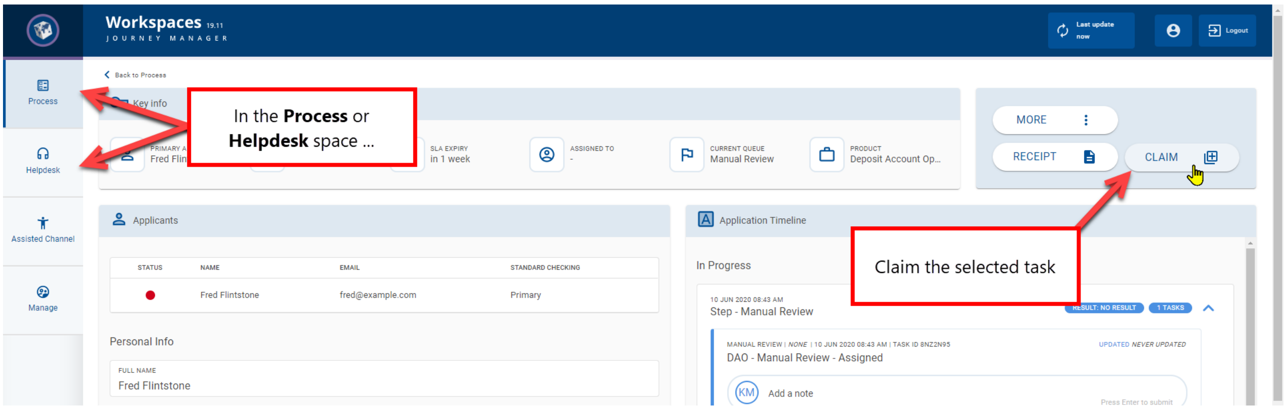
   library_addClaim is located in the Actions group.


   library_addClaim is located within the selected task in the application timeline.




The Claim button is located in the Action panel.




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

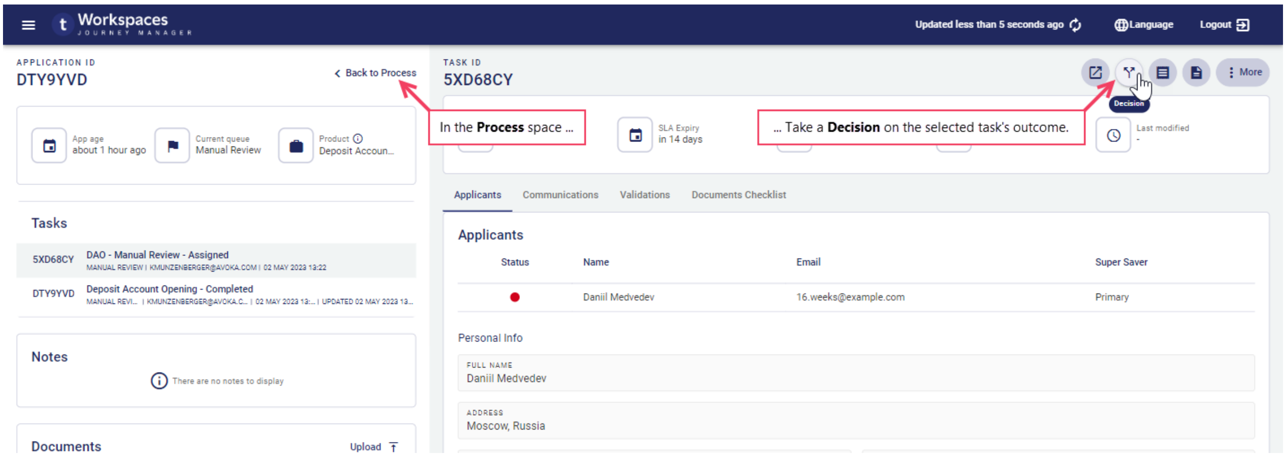
When you have all the information you need about a task, you can take a decision on the task's outcome. Taking a decision on a task completes the task and moves it along in its life cycle.

The Decision action is available only from the Details screen in the 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.

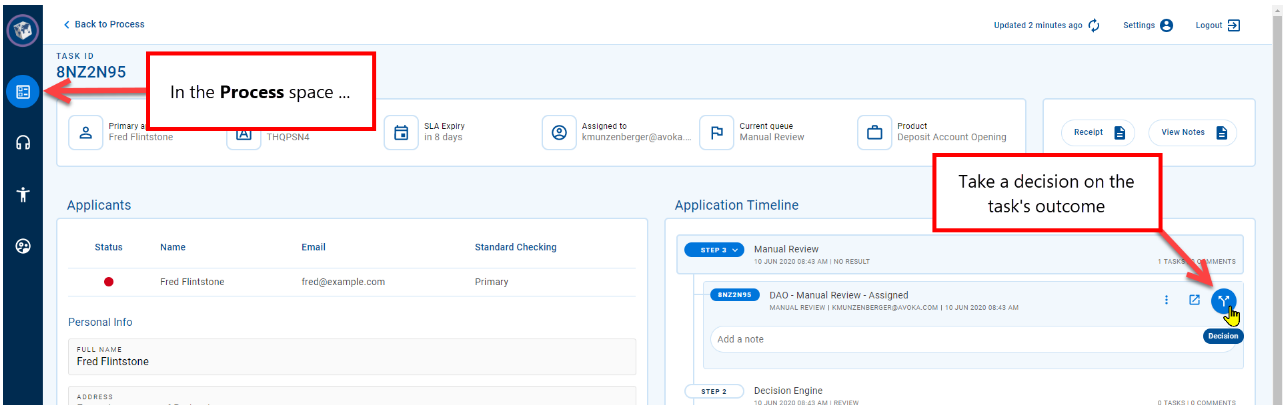
To take a decision on a task's outcome :

1. From the Spaces navigation menu, select the Review space. The List screen is displayed.
2. In the item list, locate a task that you want to take a decision on and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click call_splitDecision. The Decision modal window is displayed.
    - 23.04
    - 20.05 to 22.10
    - Prior to 20.05 (EOL)

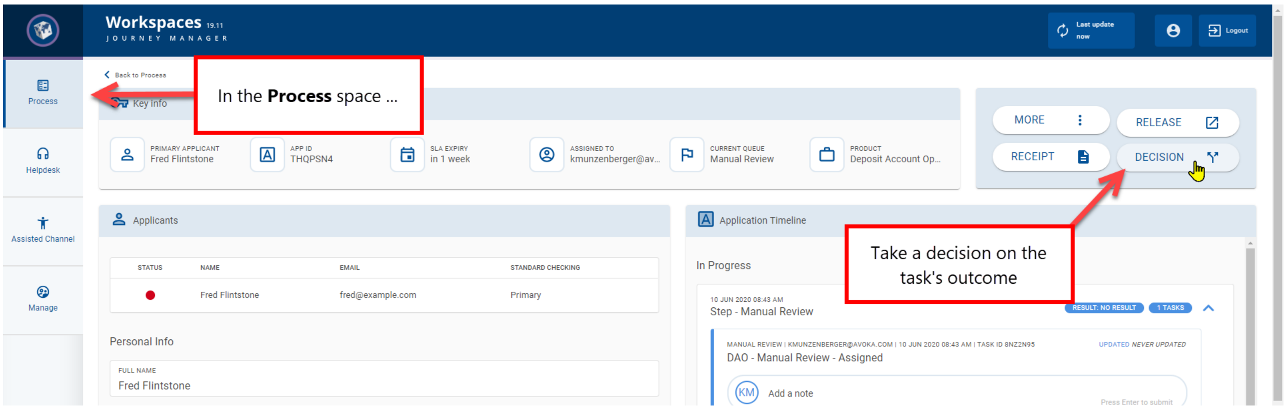
   call_splitDecision is located in the Actions group.

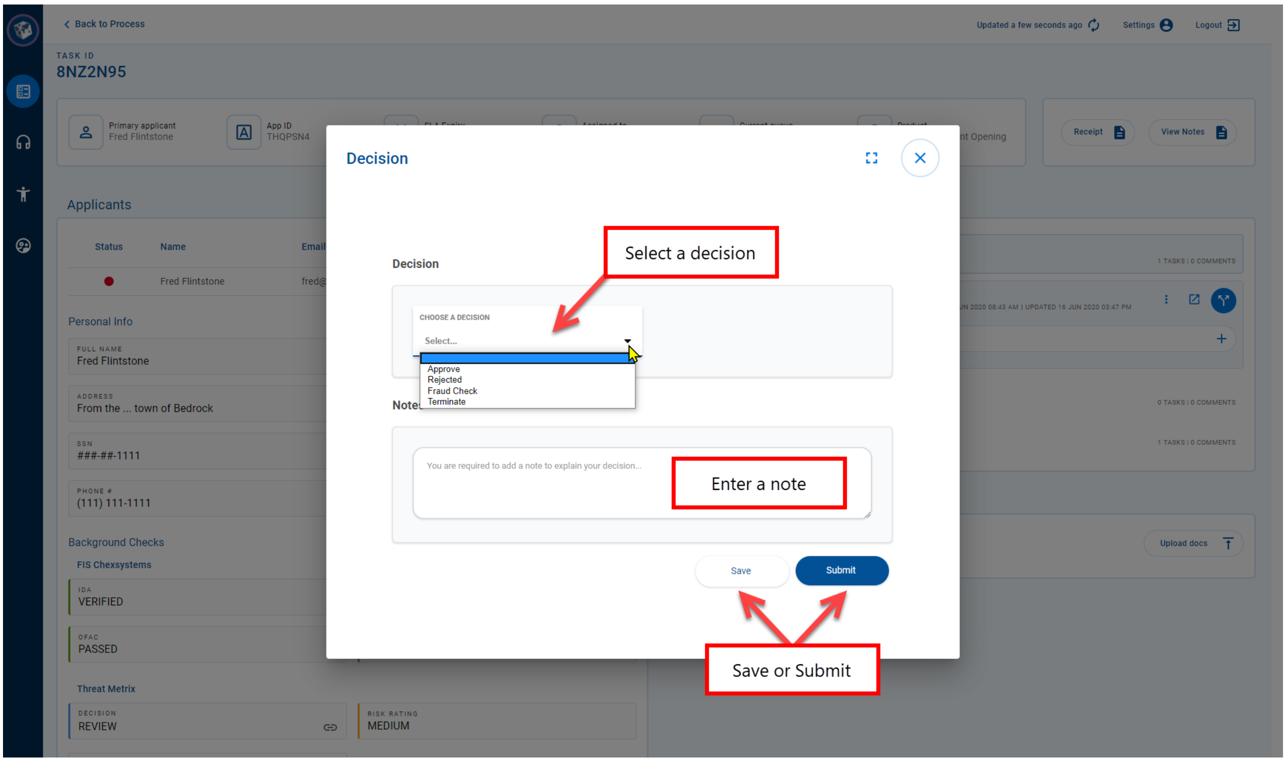
   call_splitDecision is located within the selected task in the application timeline.




The Decision button is located in the Action panel.




4. Select one of the options in the Choose a Decision list. 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 closeClose to close the Decision modal 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 modal 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

A key feature of the Brokers 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 Application action can only be accessed by an authenticated user; that is, a user who is logged in to Journey Brokers 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 with New Application.

INFO

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. 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 Journey Brokers, the New Application action is only available from the Search screen; it isn't available from the Details screen.

To start an application in Journey Brokers:

1. Login to Journey Brokers.
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: Re-open an application form.

# New Form: Start a new application

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 action can only be accessed by an authenticated user; that is, a user who is logged in to Journey Workspaces 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 with New Form.

INFO

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. 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 descriptionNew Form and select a form / product type from the list displayed.
3. A modal window opens containing the selected form. Enter any application details that you know or have at hand.
4. If you've entered all the required information, you can submit your application; otherwise, you can save it and come back later to complete your application.
    - To save your application, click menuMenu then select save Save Application.
    - To submit your application, click Submit on the application form.

5. Close the modal window, returning to the List screen. If you submitted your application, it will appear in the item list in the All applications view; otherwise, it will be in the My Saved view. If you can't see it straight away, you may need to refresh the page.

You can return to a saved application to continue entering information on the applicant's behalf at any time until the application has been submitted. For information about how to continue an application, see View Form: Re-open an application form.

# Task notes and comments

NOTE

In Workspaces 22.10 and earlier releases, notes are added to tasks from the application timeline. To learn more, see The Application Details Screen (22.10 and earlier) > application timeline.

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 such as how the application is processed, details of user inquiries, or changes in prioritization. An application can pass through many different sets of hands, so 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 notes against the relevant tasks. Notes can be added to any task at any time, even if the task is completed.

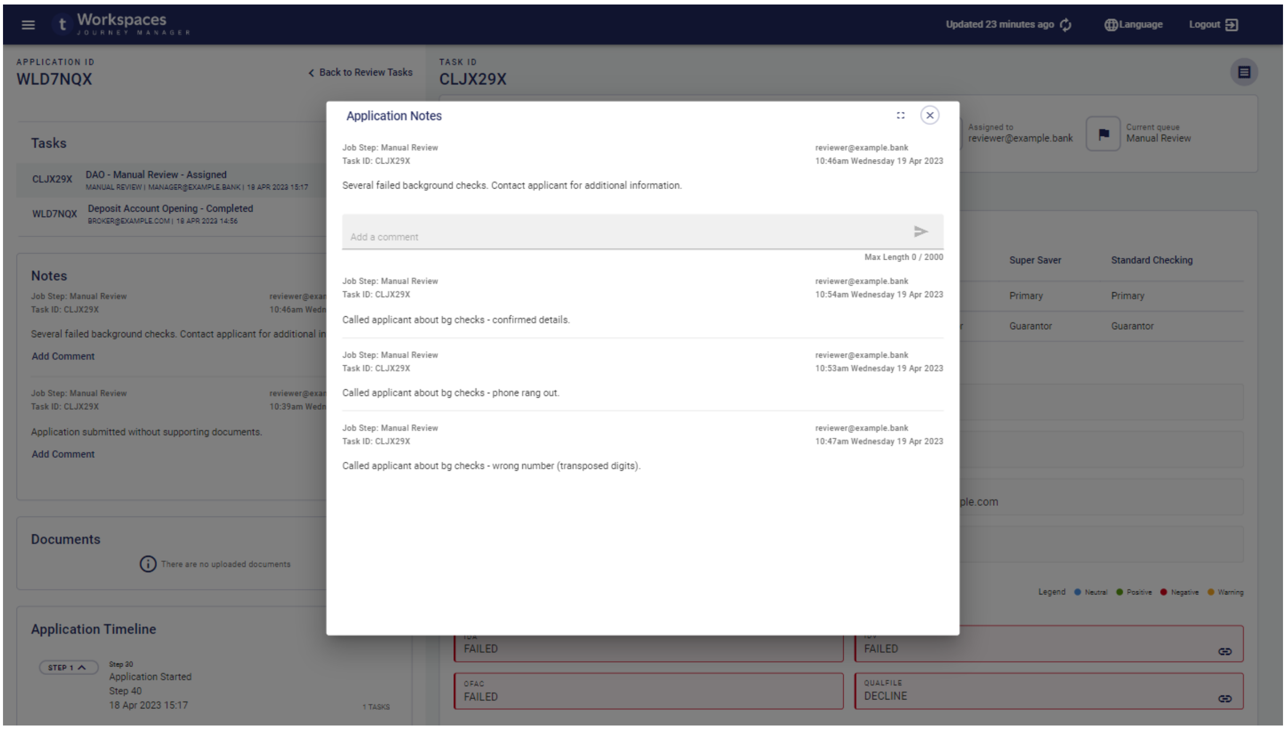
INFO

In Workspaces 22.04 and earlier releases, notes can be added to any task that is in progress, but not to completed tasks.

## Add a note

To add a note to a task:

1. Select the Details screen for the task you want to add a note to.
2. In the task switcher, locate the task you want to add a note to and select it. The task's details are displayed in the Task pane.
3. Click commentAdd Notes. The Add Notes modal window is displayed. Any existing notes are displayed in the reverse order in which they were made, accompanied by metadata that places each note in the context of the application's and task's state at the time it was added. A scroll bar appears if necessary for you to view all the notes, and you can expand the modal window to use the full screen.




4. Type your note in the Add a note box, and click sendSend. If you need to, you can add multiple notes.
5. When you're finished adding notes, click closeClose in the top-right corner of the modal window to close it and return to the Details screen.

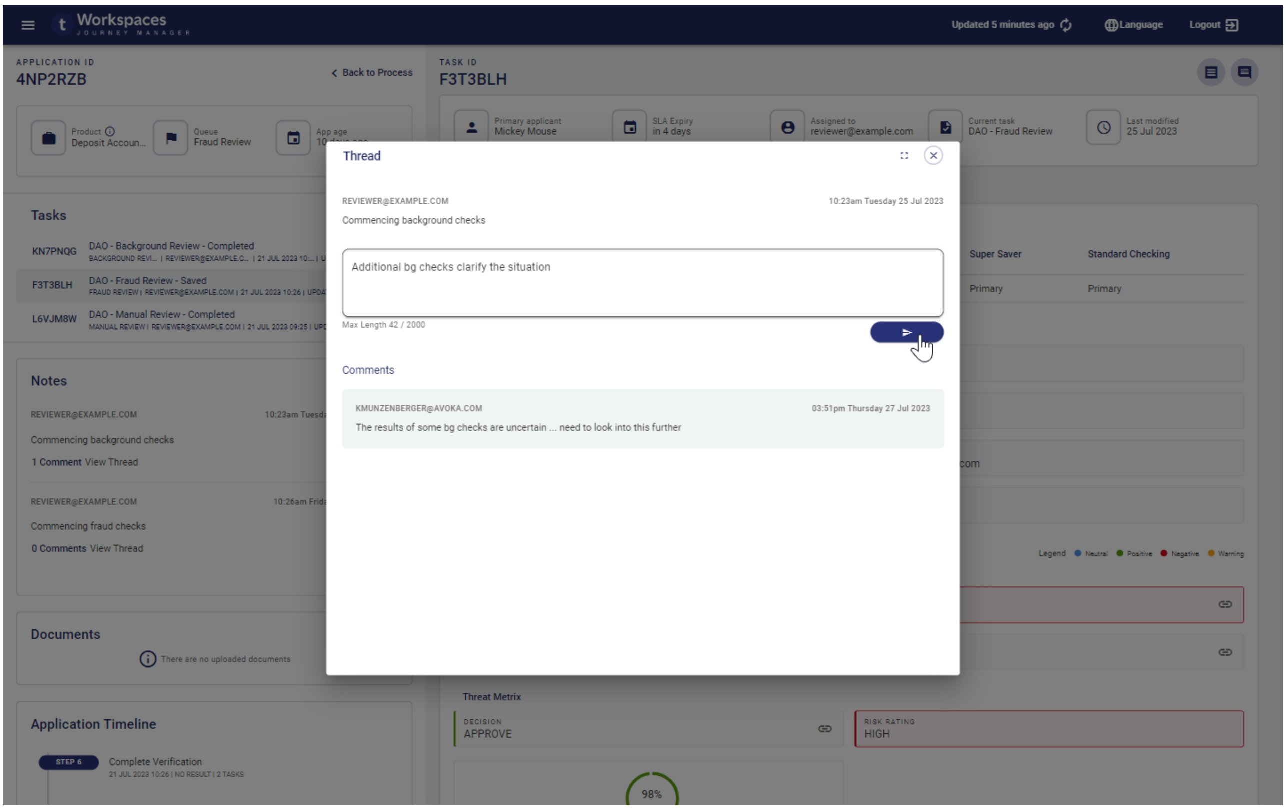
## Add a comment

You can comment on a note, thereby forming a thread starting with the note and followed by any comments made against it. The number of comments on a note is shown on the note's Comments button. These comments can be viewed and new comments added in the Thread modal window. Comments are displayed in the Thread modal in the reverse order in which they were made with the newest comments at the top. To view the Thread modal, click Comments.

To add a comment to a note:

1. Ensure the task with the note you want to comment on is selected.
2. Identify the note you want to comment on. You may need to expand the Notes card and scroll down to find it.

3. Click Comments below the note. The Thread modal window




4. Type your comment in the Add a comment box, and click sendSend. If you need to, you can add multiple comments.
5. When you're finished adding comments, click closeClose.

NOTE

The length of a note or comment is limited to 2000 characters.

# Reassign a task to another user

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 a List screen or a Details screen.

## Reassign from a List screen

To reassign a task to another user from a 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. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to reassign and point your cursor at it. The available actions appear at the right-hand side.
3. Click group_addReassign. A list of Workspaces users is displayed, showing both the Workspaces user id and the full name for each user.
4. Select a user from the list. The task is reassigned to the selected user, and their Workspaces id is displayed in the Assigned to column.

TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

You can use the Bulk Action feature to reassign multiple tasks at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

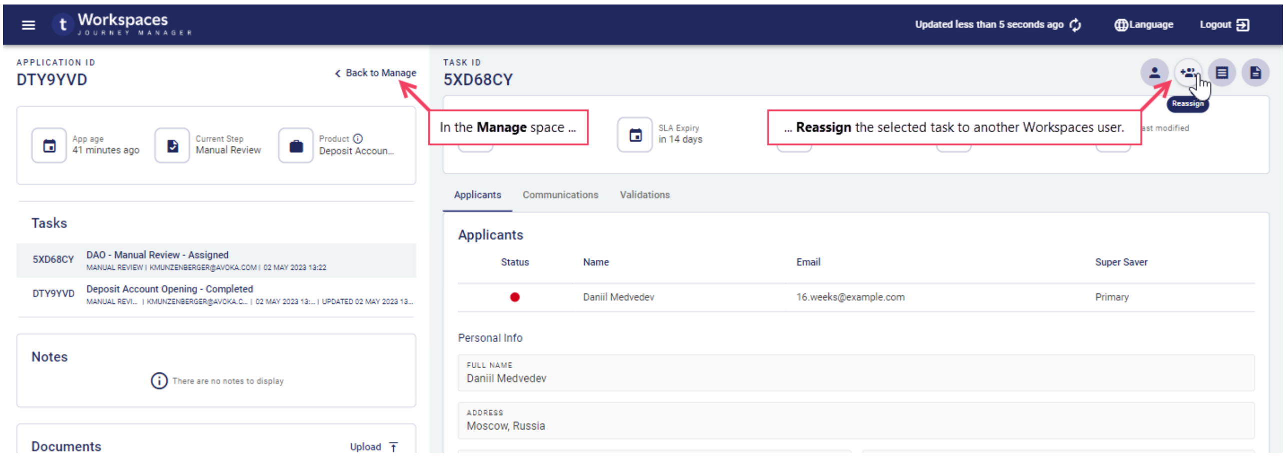
## Reassign from a Details screen

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

1. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to reassign and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click group_addReassign. A list of Workspaces users is displayed, showing both the Workspaces user id and the full name for each user.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

   group_addReassign is located in the Actions group.



is located within the selected task in the application timeline.

The button is located in the Action panel.

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

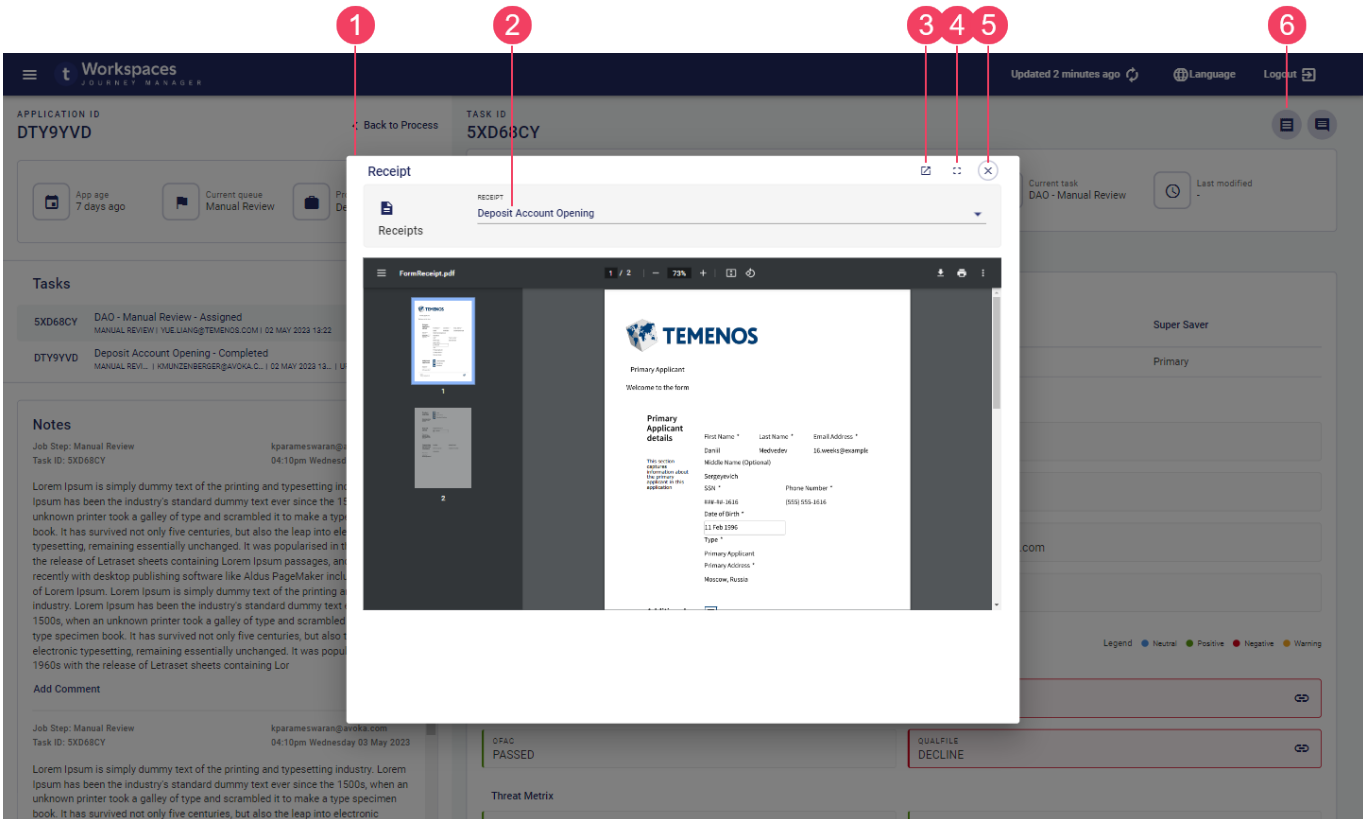
When you reassign  a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

# Receipt: View a receipt

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.

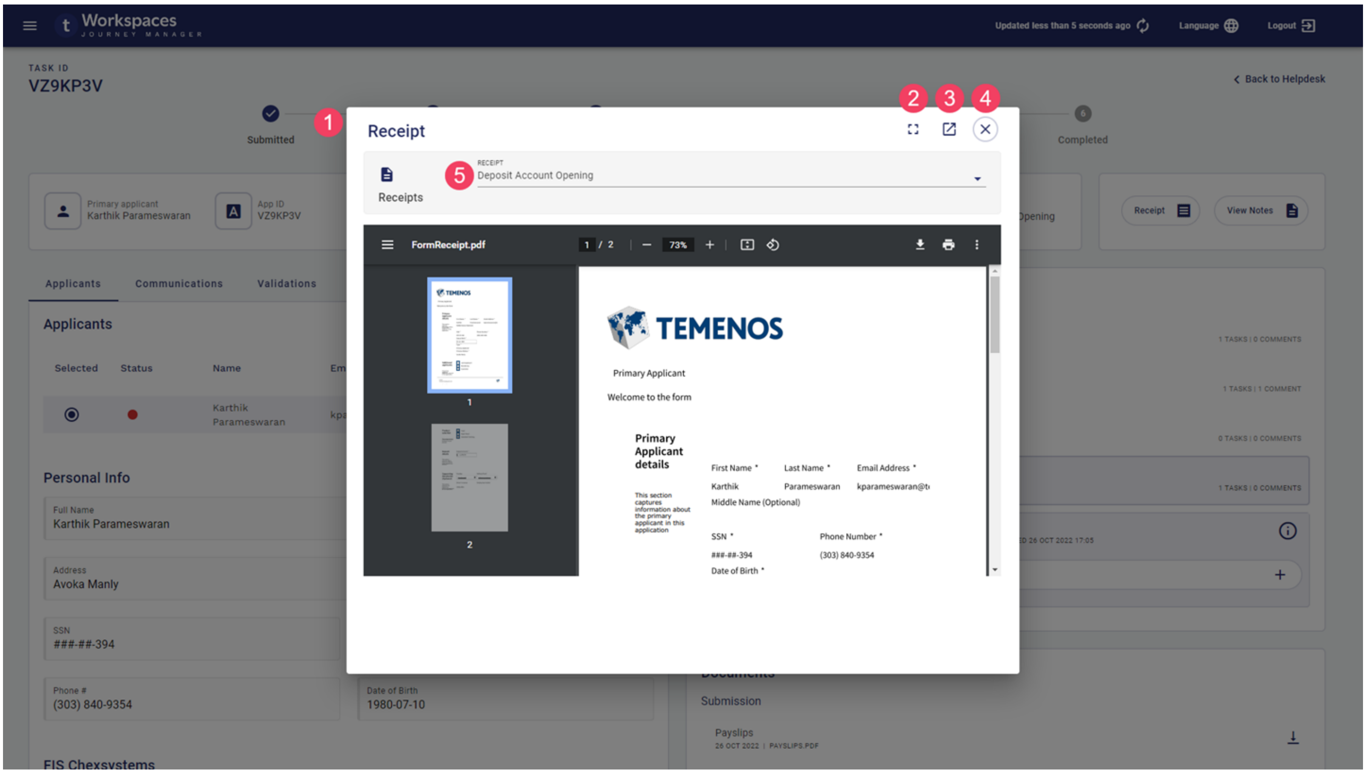
> INFO
>
> The Receipt action is available once an application has been submitted. If the application has been saved but not submitted, the View Form action is available instead.

- 23.04
- 22.10
- 22.04 and earlier

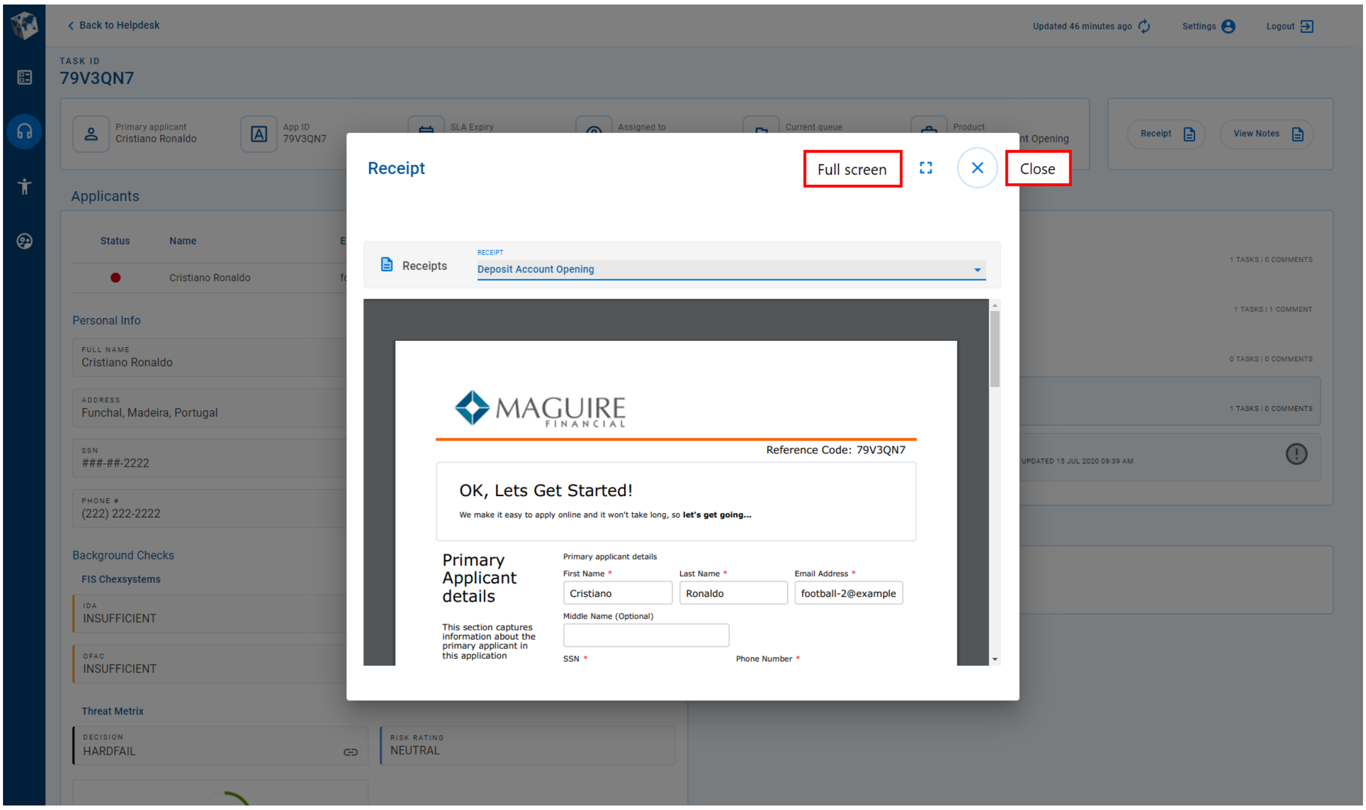



1. Receipt modal window
2. Receipt selector
3. Pop out to new tab
4. Expand to full screen

5. Close modal window
6. Receipt button




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. | 22.10This feature was updated in 22.10.

To view a receipt from a List screen:

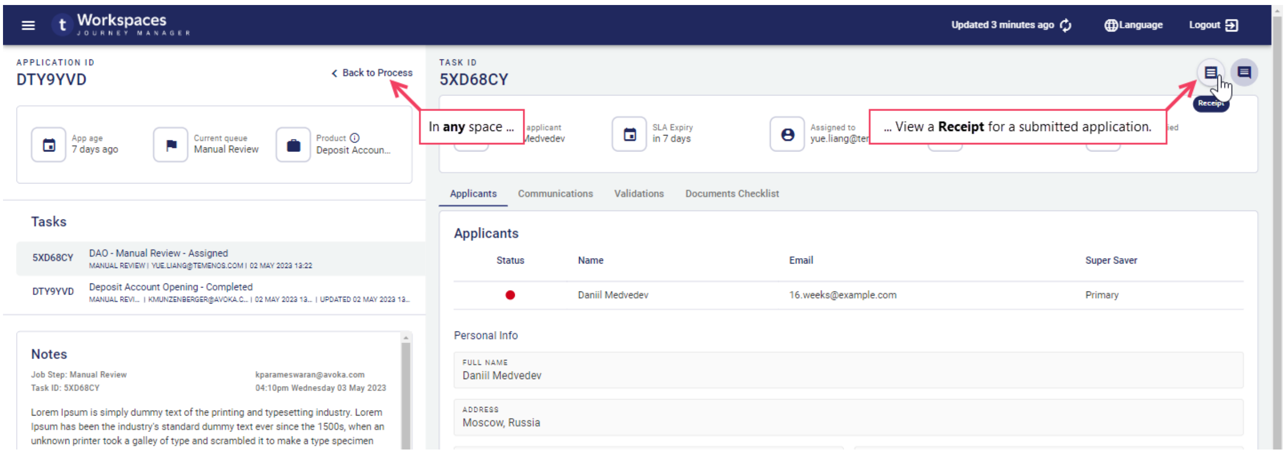
1. From the Spaces navigation menu, select any space. The List screen is displayed.
2. In the item list, locate an application or task that you want to view a receipt for and point your cursor at it. The available actions appear at the right-hand side.
3. Click receiptReceipt. The Receipt modal window is displayed, showing the application information. Scroll bars and navigation tools are available, allowing you to access all of the receipt. If there are multiple receipts, you can use the Receiptselector to switch between receipts.

4. When you're finished viewing the receipt, click closeClose in the top-right corner of the modal window to close it and return to the screen you started from.

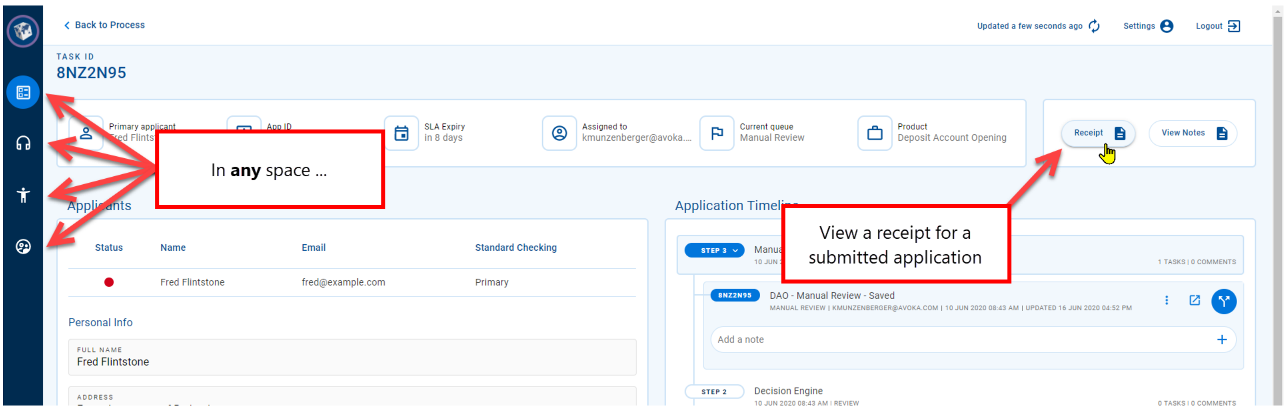
To view a receipt from a Details screen:

1. From the Spaces navigation menu, select any space. The List screen is displayed.
2. In the item list, locate an application or task that you want to view a receipt for and select it. The Details screen for the selected item is displayed.
3. On the Details screen, click receiptReceipt. The Receipt modal window is displayed, showing the application information. Scroll bars and navigation tools are available, allowing you to access all of the receipt. If there are multiple receipts, you can use the Receiptselector to switch between receipts.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

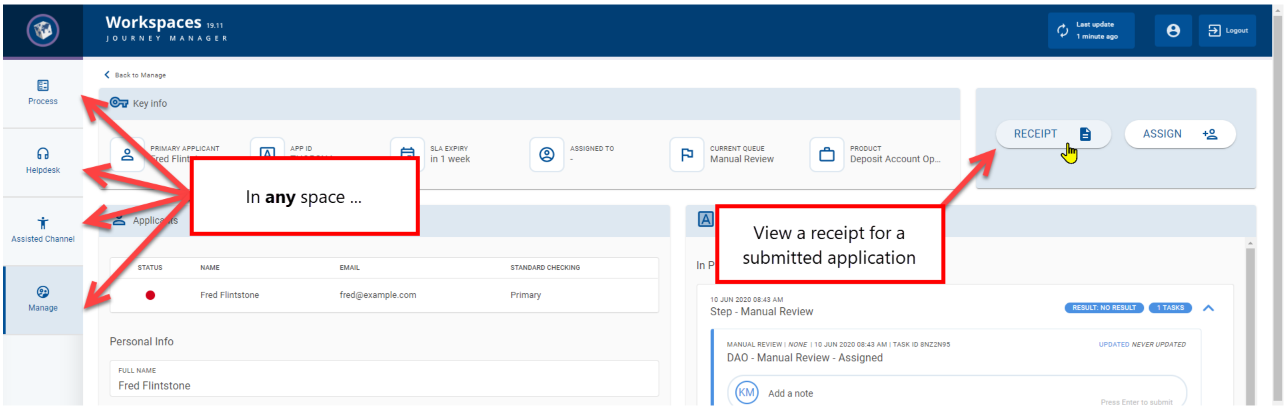
   receiptReceipt is located in the Actions group.




   receiptReceipt is located within the selected task in the application timeline.



The Receipt button is located in the Action panel.




4. When you're finished viewing the receipt, click closeClose in the top-right corner of the modal window to close it and return to the screen you started from.

# Recover an abandoned application

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.

INFO | HOW DOES AN APPLICANT ACCESS A RECOVERED APPLICATION?

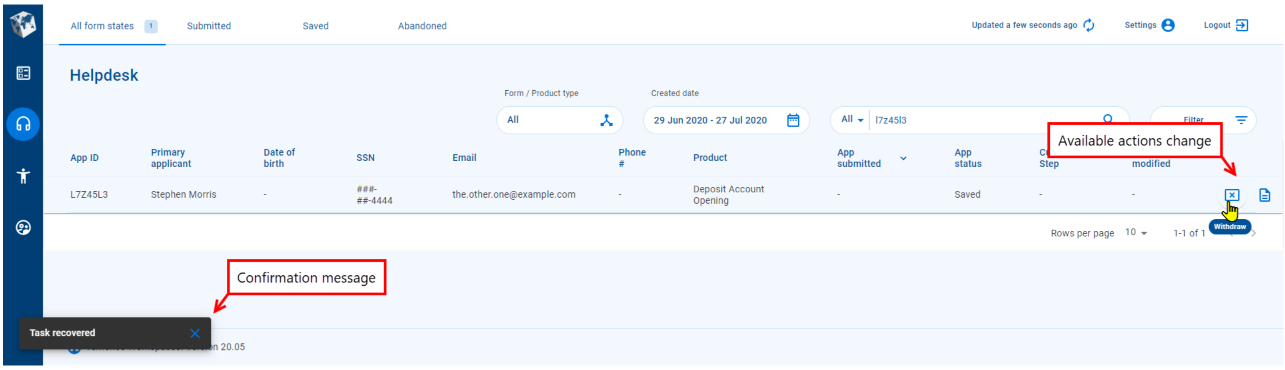
Workspaces does not mandate how an applicant can access a recovered application in the default configuration as this is an aspect that will be specific to each Workspaces portal. However, it's likely that the applicant will have received an email at some point - such as when they started or saved their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

## Recover from a List screen

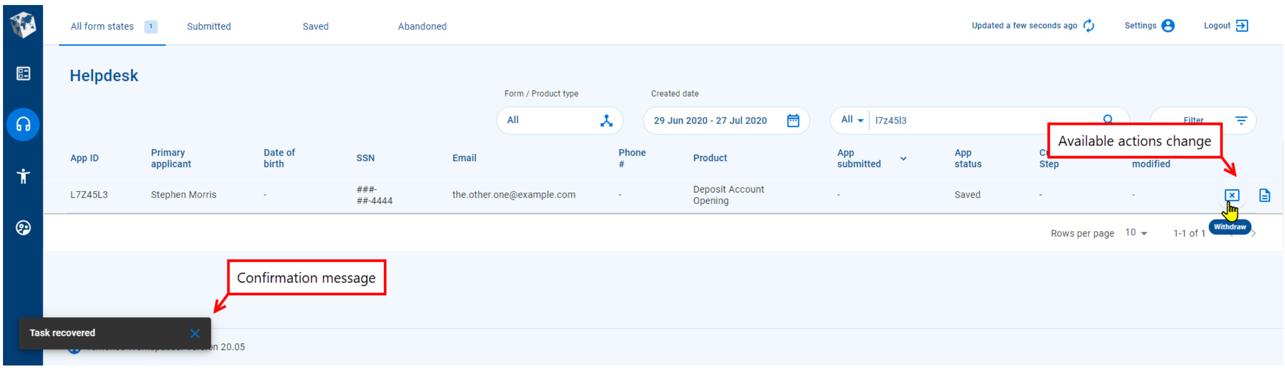
To recover an application from a List screen :

1. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application that you want to recover and point your cursor at it. The available actions appear at the right-hand side. When searching for an application, keep in mind that some application details may not be available if the application has not been filled in completely.




The Recover action is available here if the application has been saved, either intentionally by the applicant or in the background by the form, before becoming abandoned or being withdrawn.

3. Click restore_from_trashRecover. 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 of the screen.



TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

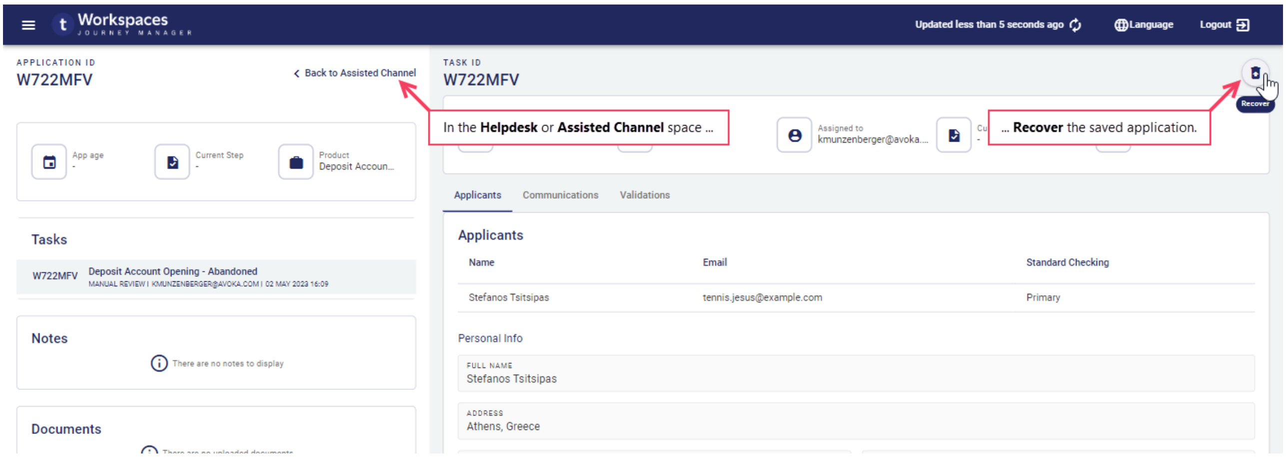
You can use the Bulk Action feature to recover multiple applications at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

## Recover from a Details screen

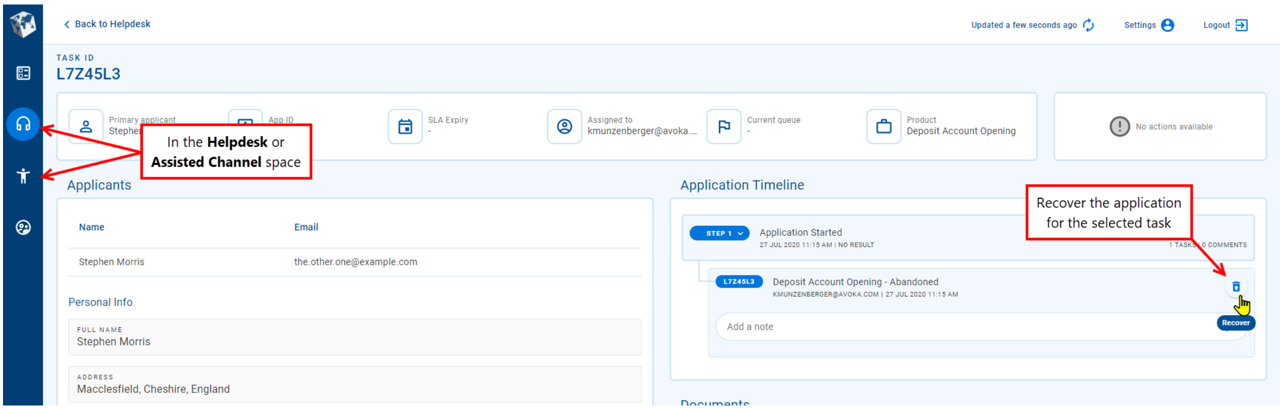
To recover an application from a Details screen :

1. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application that you want to recover and select it. The Details screen for the selected application is displayed. When searching for an application, keep in mind that some application details may not be available if the application has not been filled in completely.
3. On the Details screen, click restore_from_trashRecover. 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 of the screen.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

   restore_from_trashRecover is located in the Actions group.

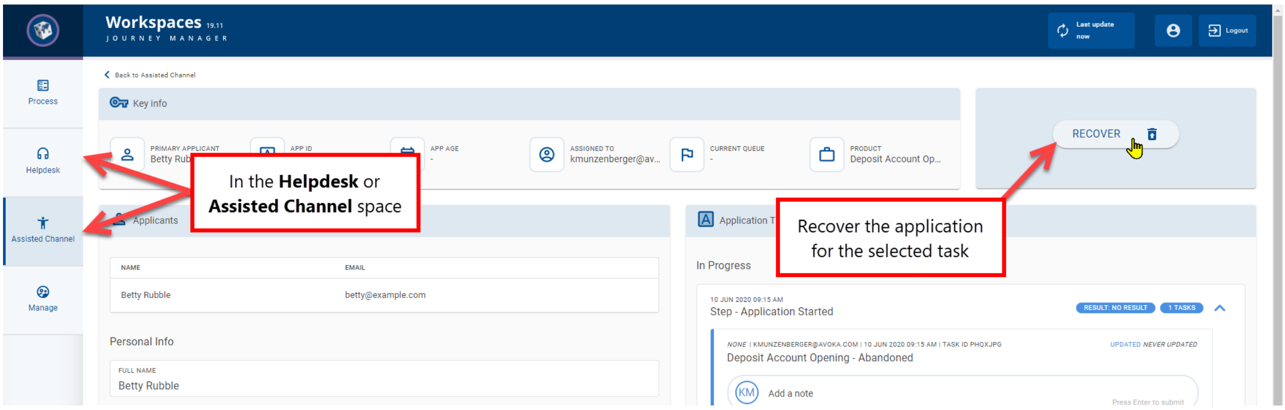



   restore_from_trashRecover is located within the selected task in the application timeline.




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

The Recover button is located in the Action panel.



# Release a task assigned to you

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 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 a task.

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 Review or Helpdesk space from either a List screen or a Details screen.

## Release from a List screen

To release a task from a List screen :

1. From the Spaces navigation menu, select the Review or Helpdesk space. The List screen is displayed.
2. In the item list, locate a task that you want to release and point your cursor at it. The available actions appear at the right-hand side.
3. Click open_in_newRelease. 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.

TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

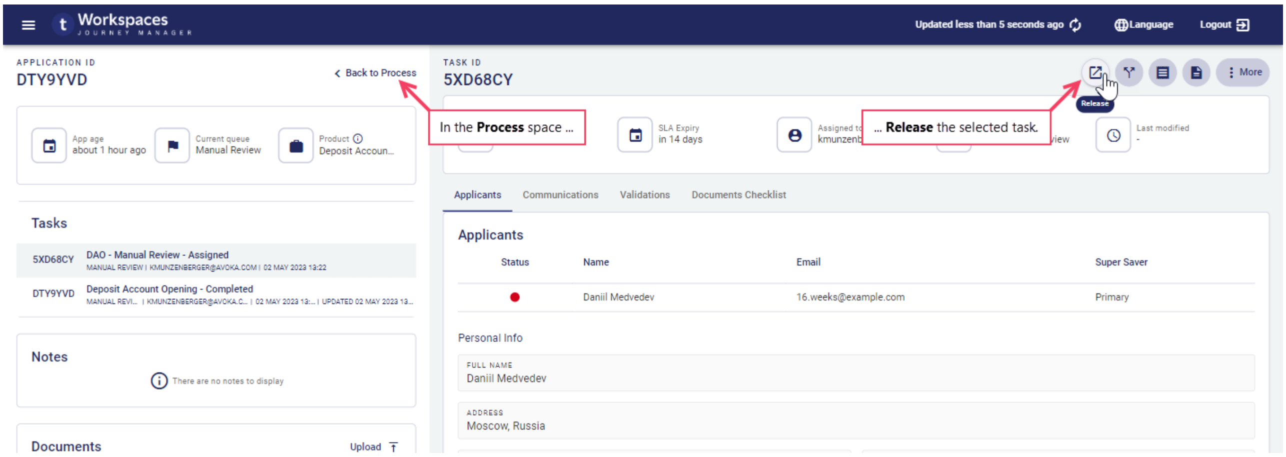
You can use the Bulk Action feature to release multiple tasks at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

## Release from a Details screen

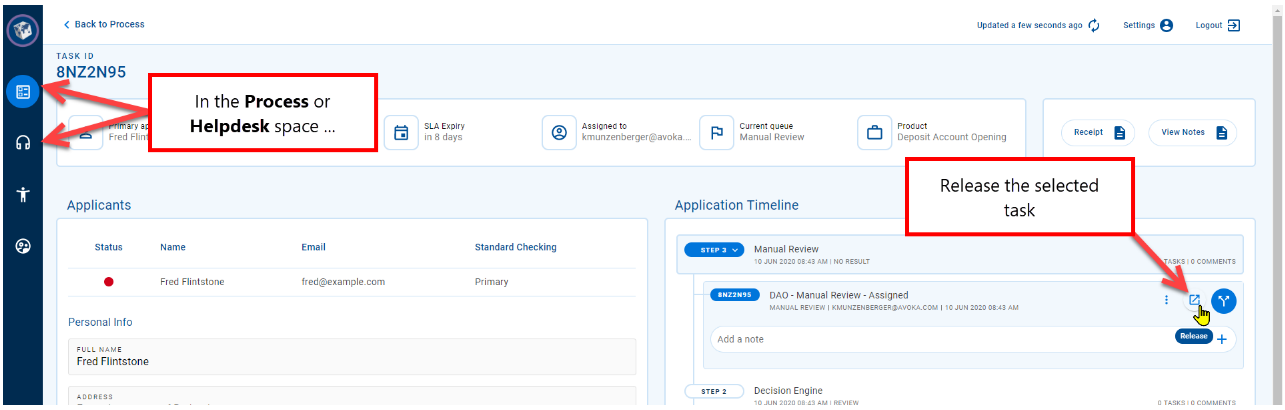
To release a task from a Details screen :

1. From the Spaces navigation menu, select the Review or Helpdesk space. The List screen is displayed.
2. In the item list, locate a task that you want to release and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click open_in_newRelease. 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.
   - [23.04]
   - [20.05 to 22.10]
   - [Prior to 20.05 (EOL)]

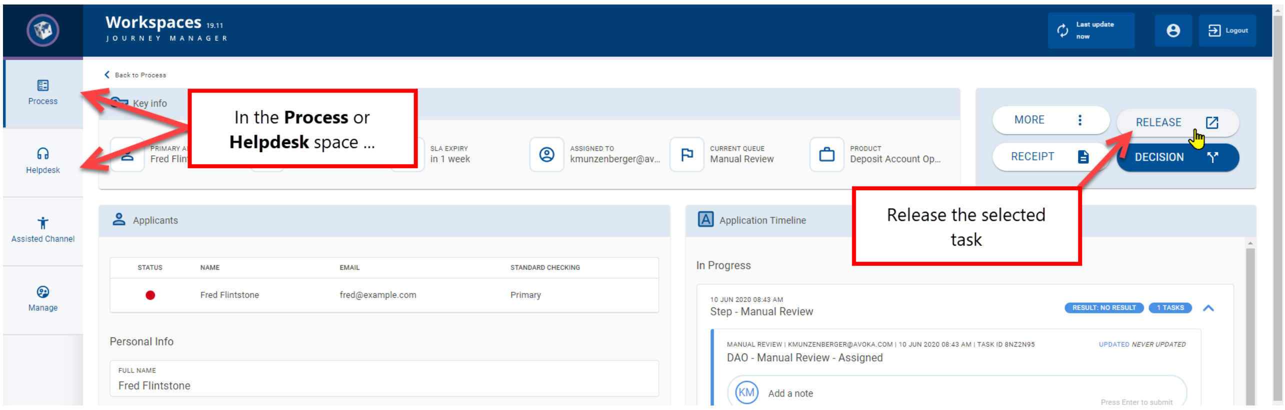
   open_in_newRelease is located in the Actions group.




   open_in_newRelease is located within the selected task in the application timeline.




   The Release button is located in the Action panel.



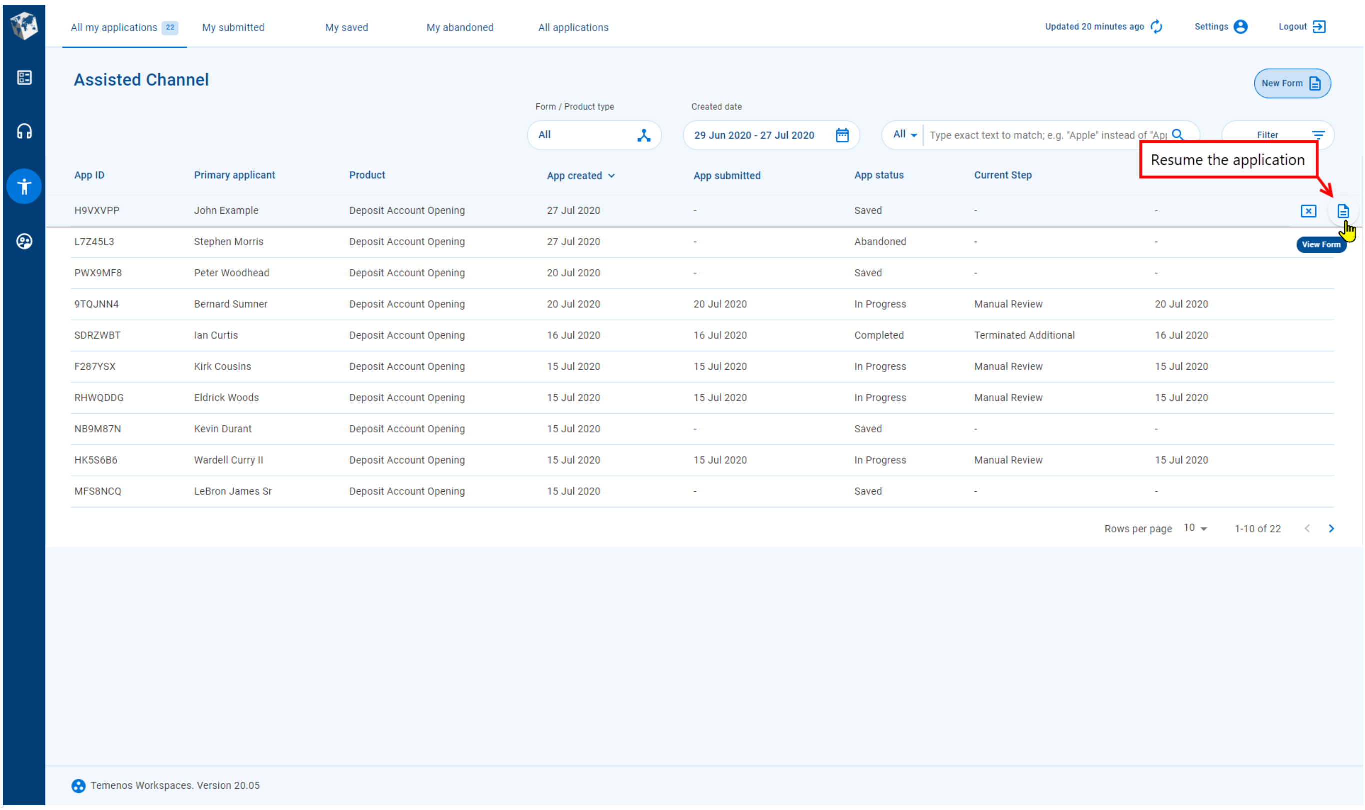

When you release  a task from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

# Resume: Re-open an application form

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.

INFO

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 Brokers 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:

- 23.04
- Prior to 23.04

1. Login to Journey Applicants using the applicant's email address entered in the application. The Details screen is displayed.
2. 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.

1. Login to Journey Brokers.
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've finished entering information, you can do one of the following actions:

- if you haven't submitted the application yet and you're not ready to submit it now, save the application again
- submit the application

When you're finished with the form, click closeClose in the top-right corner to close the modal window and return to the Details screen.

# Share a Details screen

When you access a Details screen, the space you're in controls the information you see and the options that are available. This means that if you want to share the Details screen you're looking at with another user, just sharing the application or task id or the Details screen's URL is not enough because none of these include information about the space you're in.

To share a Details screen more effectively, you can use the Share action to obtain a URL that you can give to another user so that they can open the same Details screen that you're looking at for the same application and task and in the same space. Note, however, that a URL generated by the Share action doesn't preserve the application's state.

What you see when you try to view a shared Details screen depends on your Workspaces permissions:

- If you have access to the space encoded in a shared URL, you'll see the current state of the shared application, including any changes made since the shared URL was generated, with the shared task selected in the shared space's Details screen.
- Otherwise, an error screen is displayed.

You can share a Details screen from the Review, Helpdesk, Assisted Channel or Manage space.

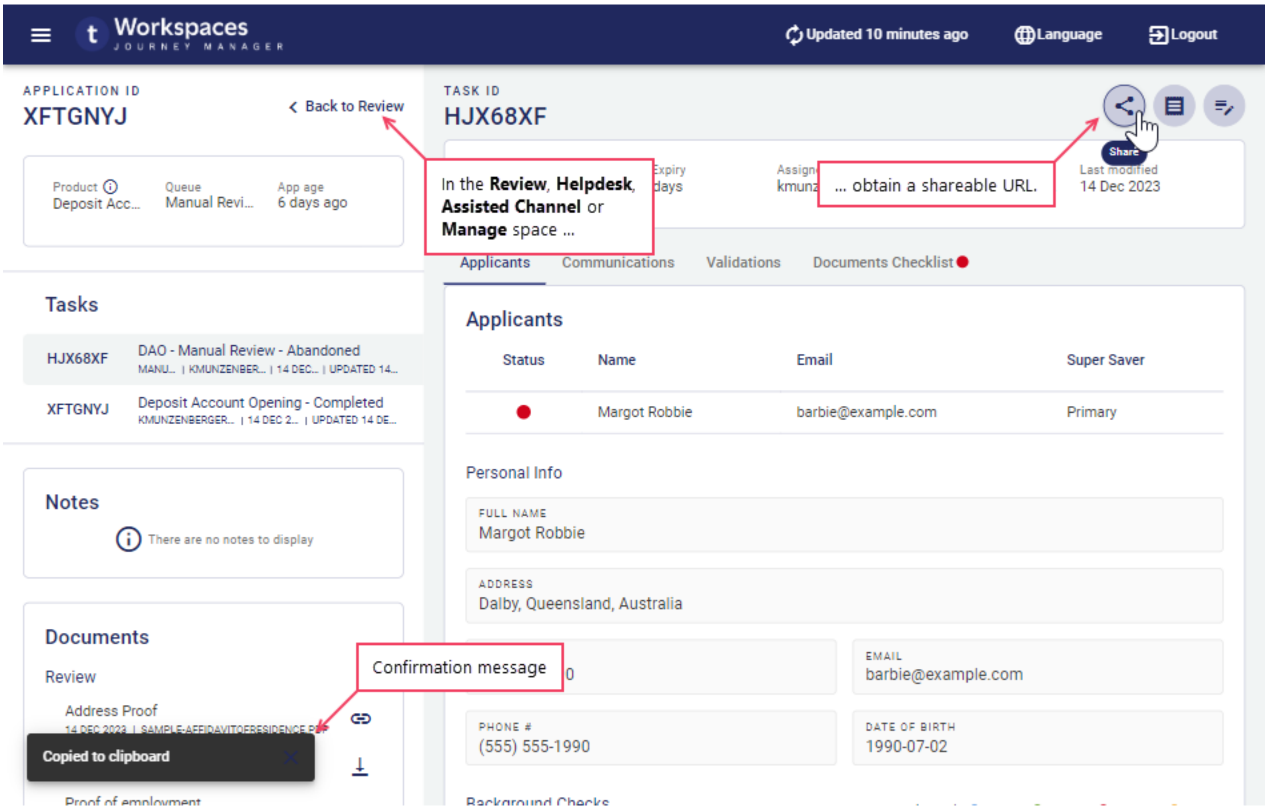
## Share a task URL

To share a task URL from a Details screen :

1. From the Spaces navigation menu, select the Review, Helpdesk, Assisted Channel, or Manage space. The List screen is displayed.
2. In the item list, locate an application or task that you want to share and select it. The Details screen for the selected item is displayed.
3. On the Details screen, click shareShare. A shareable URL is generated and copied to your clipboard.
4. To share the URL, go to another application such as an email or chat app, and paste the shareable URL from the clipboard.

   info
   The shareable URL remains in the clipboard temporarily. Other actions you perform may replace the clipboard's contents.

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




## Example

This step-by-step example demonstrates how to use the Share action to obtain a shareable URL for a Details screen in the Manage space. When the URL is generated, it is copied to the clipboard automatically, and we'll confirm this by copying it into the Windows Notepad app.

1. Login to Workspaces and select the Manage space. The List screen is displayed.
2. In the item list, locate an application that you want to share and select it. In this example, we'll select the application for the applicant "Lian Li".
3. The Details screen for our selected application is displayed. The application's most recent task is selected. If we were interested in a different task, we could select it now, but for this example we'll stick with the most recent task.
4. The shareShare button is located in the action button group. Click shareShare.
5. A shareable URL for this Details screen is generated and copied to the clipboard, and a message is displayed in the bottom left corner of the screen confirming this.
6. Finally, open the Notepad app and paste from the clipboard to reveal the shareable URL.

# Unassign a task

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

When you unassign a task, you remove the task's assignee. 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 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 a List screen or a Details screen.

## Unassign from a List screen

To unassign a task from a List screen :

1. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to unassign and point your cursor at it. The available actions appear at the right-hand side.
3. Click personUnassign. The task is no longer assigned, and you can confirm this by noting that the Workspaces id is removed from the Assigned column.

[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.

TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

You can use the Bulk Action feature to unassign multiple tasks at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

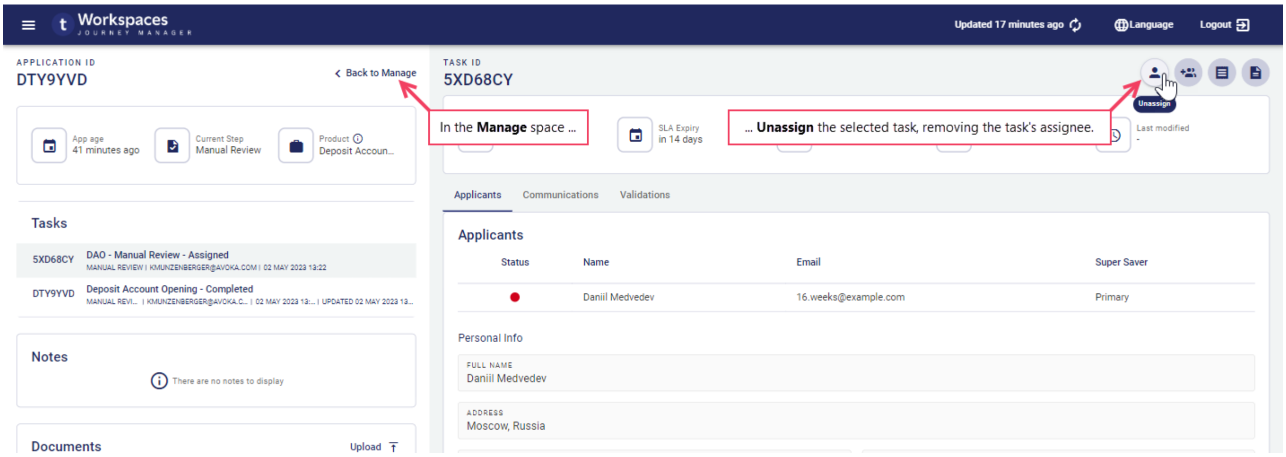
## Unassign from a Details screen

To unassign a task from a Details screen :

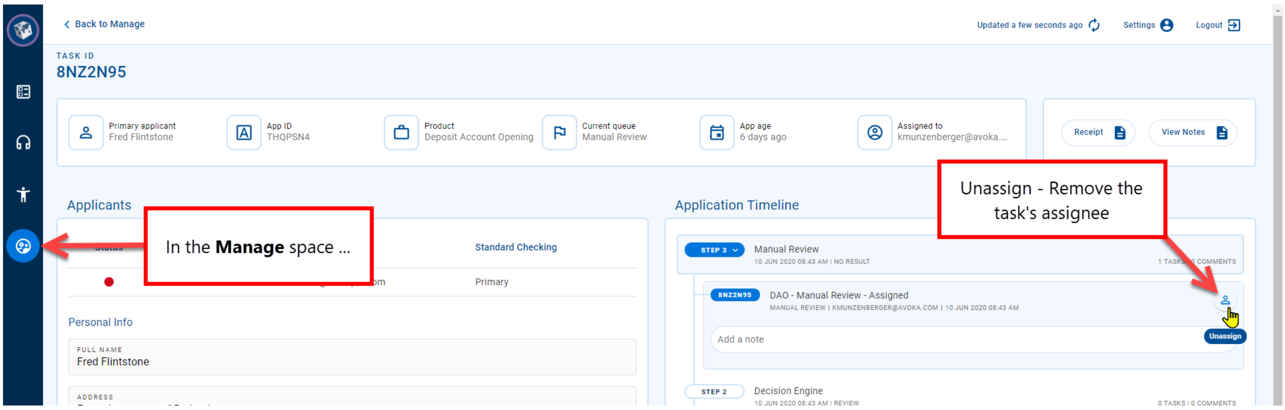
1. From the Spaces navigation menu, select the Manage space. The List screen is displayed.

2. In the item list, locate a task that you want to unassign and select it. The Details screen for the selected task is displayed.
3. On the Details screen, click personUnassign. The task is no longer assigned, and you can confirm this by noting that the Workspaces id is removed from the Assigned to field.
   - 23.04
   - 20.05 to 22.10
   - Prior to 20.05 (EOL)

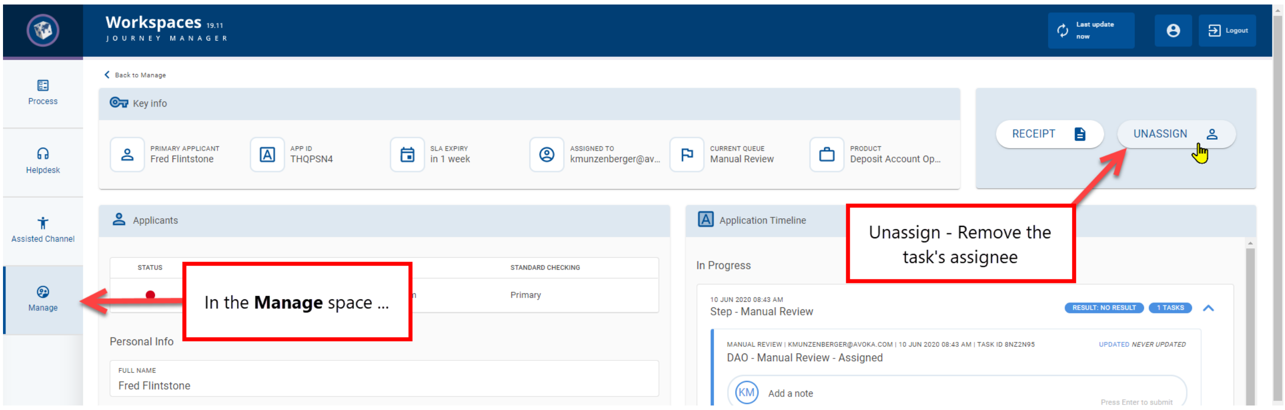
   personUnassign is located in the Actions group.

   personUnassign is located within the selected task in the application timeline.




The Unassign button is located in the Action panel.



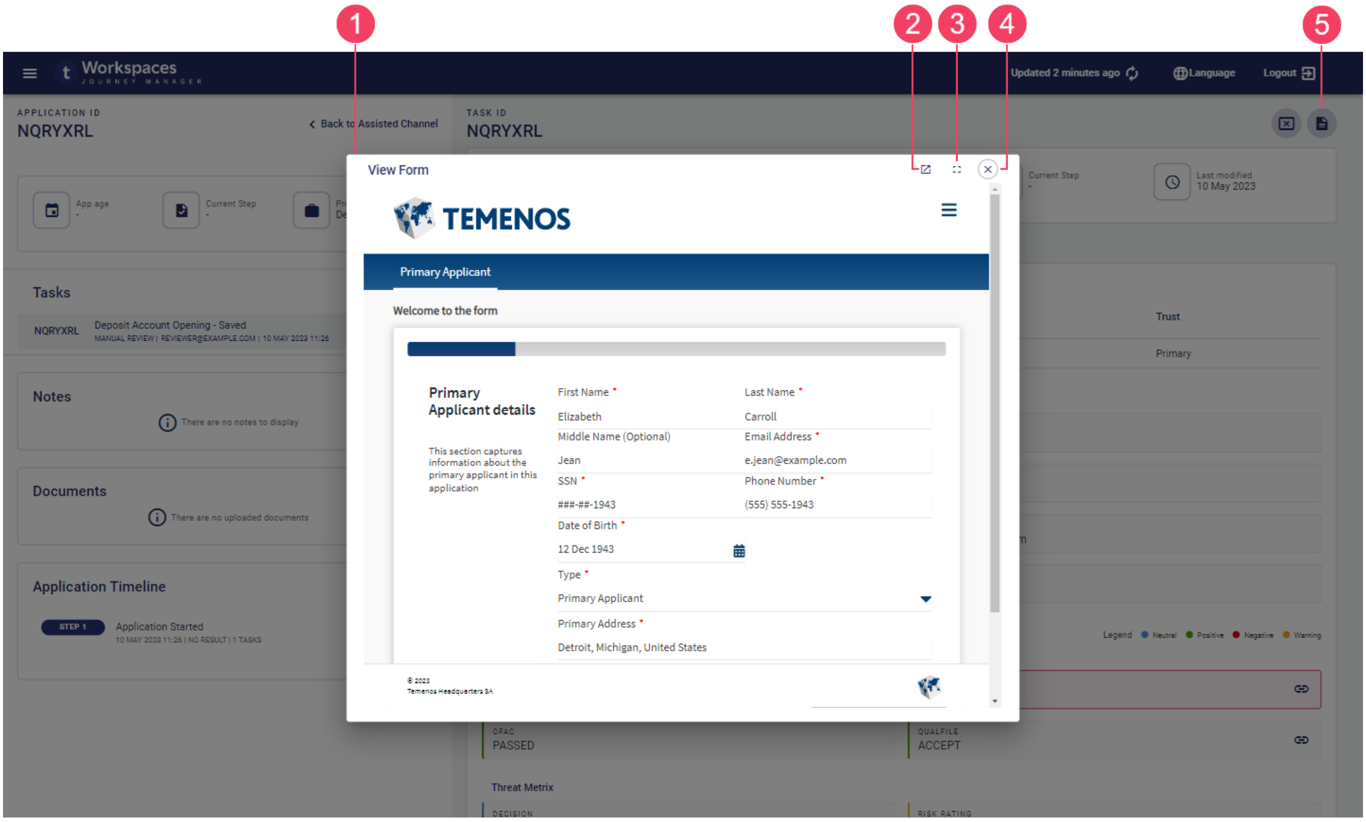

When you remove  a task assignment from any screen, a message is displayed briefly in the bottom left corner of the page identifying whether or not the action was successful.

# View Form: Re-open an application form

Some of the actions you perform in Workspaces rely upon you being able to see or modify the information entered and saved by an applicant or Assisted Channel staff; for example, when responding to a customer inquiry adding information on behalf of an applicant. With the View Form action, you can open a saved application, view or add more application details, and submit the application.

INFO

The View Form action is available if the application has been saved but not yet submitted. However, if the application has been submitted, the Receipt action is available instead.




1. View Form modal window
2. Pop out to new tab
3. Expand to full screen
4. Close modal window
5. View Form button

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. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application or task that you want to view the form for and point your cursor at it. The available actions appear at the right-hand side.
3. Click descriptionView Form. A modal window opens showing the application in the same form used to capture the original information. Scroll bars and navigation tools are available, allowing you to access all of the application form.
4. When you're finished accessing the form, click closeClose in the top-right corner of the modal window to close it and return to the screen you started from.

To view a form from a Details screen:

1. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application or task that you want to view the form for and select it. The Details screen for the selected item is displayed.
3. On the Details screen, click descriptionView Form. A modal window opens showing the application in the same form used to capture the original information. Scroll bars and navigation tools are available, allowing you to access all of the application form.
4. When you're finished accessing the form, click closeClose in the top-right corner of the modal window to close it and return to the screen you started from.

# View all notes for an application (22.10 and earlier)

NOTE | 23.04THIS FEATURE WAS UPDATED IN THE 23.04 RELEASE

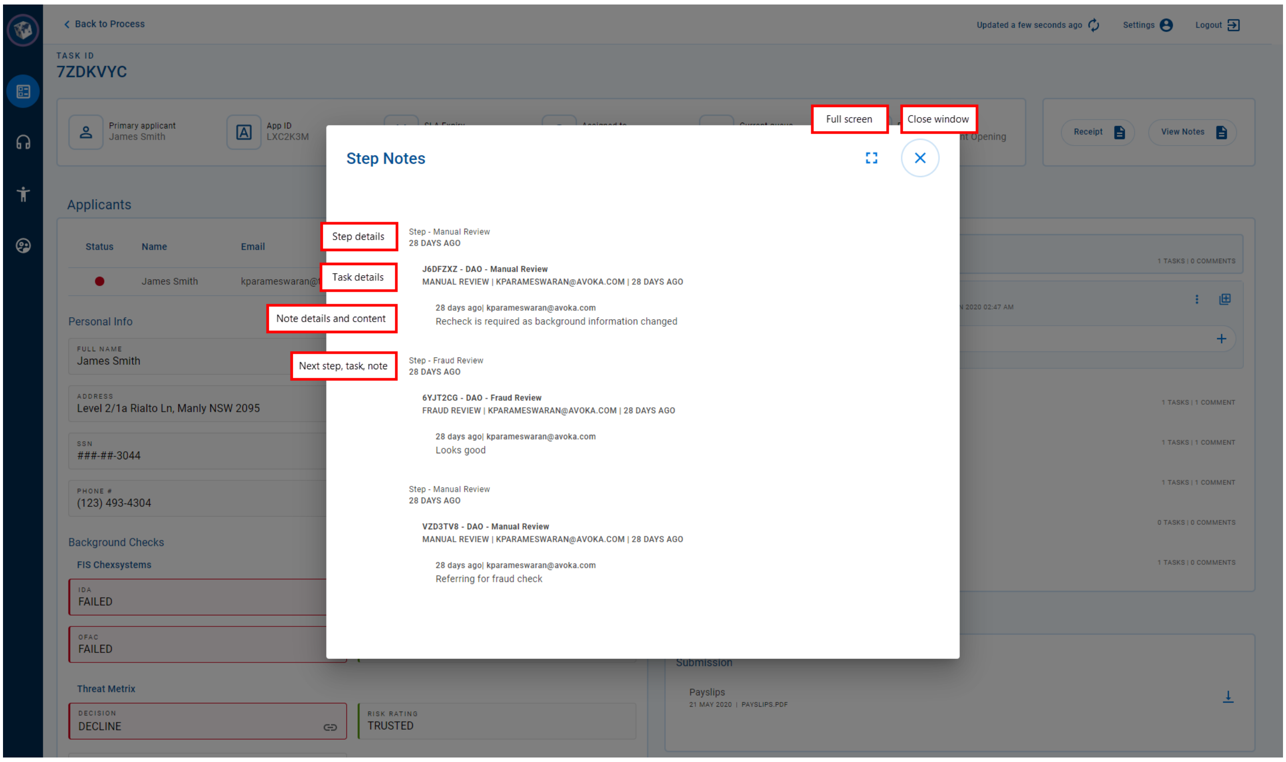
In Workspaces 23.04 and later releases, the View Notes action is replaced with Show All in the Notes card. To learn more, see The Application Details screen > Notes.

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 such as how the application is processed, details of user inquiries, or changes in prioritization. An application can pass through many different sets of hands, so 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 notes against the relevant tasks. Notes can be added to any task at any time, even if the task is completed.InfoIn Workspaces 22.04 and earlier releases, notes can be added to any task that is in progress, but not to completed tasks. To learn about creating notes, see Application Details Screen > Application timeline.

You can view notes for a specific task in the application 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. From the Spaces navigation menu, select any space. The List screen is displayed.
2. In the item list, locate an application or task that you want to view notes for and point your cursor at it. The available actions appear at the right-hand side.
3. Click descriptionView Notes. The Step Notes modal window is displayed. 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, allowing you to view all the notes, and you can expand the modal window to use the full screen.




4. When you're finished viewing the notes, click closeClose in the top-right corner of the modal window to close it and return to the screen you started from.

# Withdraw an unsubmitted application

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.

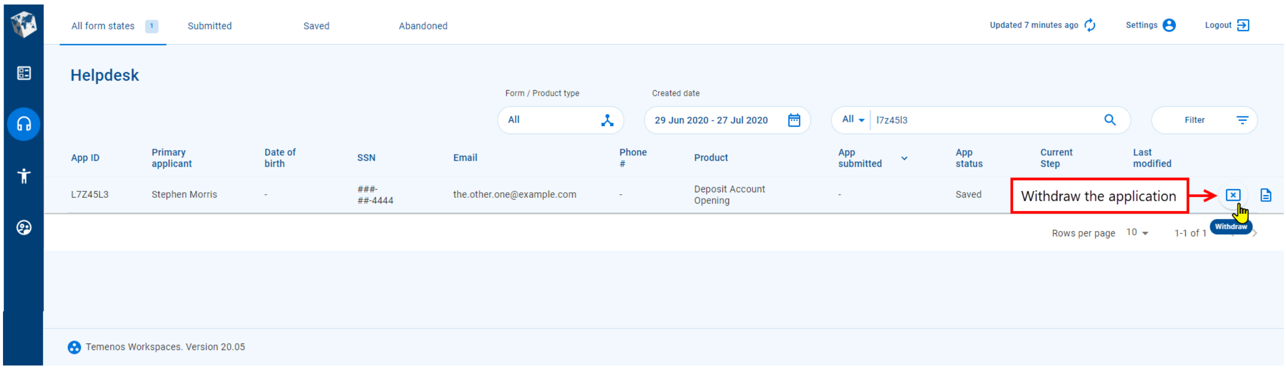
While it might be good practice to withdraw unwanted unsubmitted applications, it is not mandatory to do so, and an unsubmitted application that is not withdrawn will eventually expire, becoming abandoned. This is important to note as it could affect an SLA relating to the processing of applications.

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

## Withdraw from a List screen

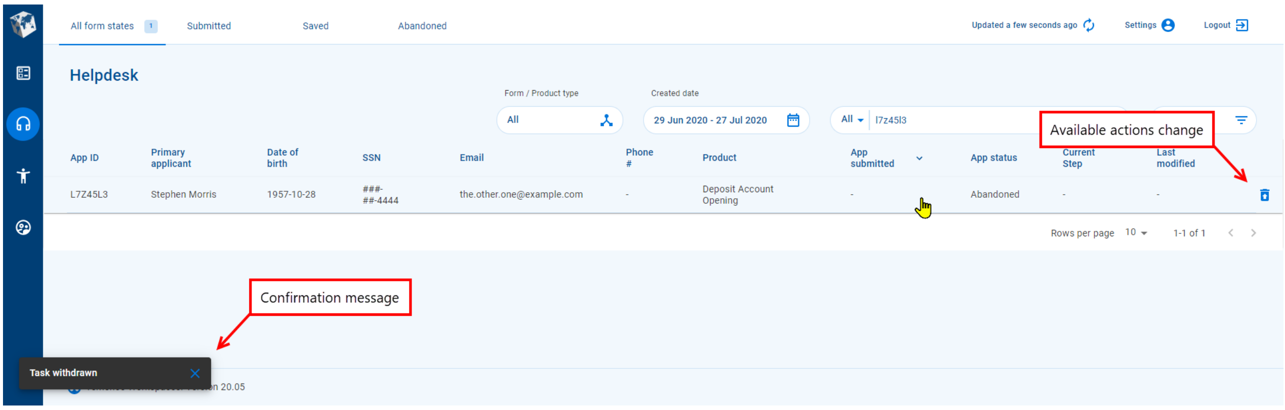
To withdraw an application from a List screen :

1. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application that you want to withdraw and point your cursor at it. The available actions appear at the right-hand side. When searching for an application, keep in mind that some application details may not be available if the application has not been filled in completely.




The Withdraw action is available here if the application has been saved, either intentionally by the applicant or in the background by the form.

3. Click cancel_presentationWithdraw. The application is withdrawn, the available actions change, and a message confirming you have withdrawn the application is displayed briefly in the bottom-left corner of the screen.




TIP | 22.10THIS FEATURE WAS INTRODUCED IN THE 22.10 RELEASE

You can use the Bulk Action feature to withdraw multiple applications at once. Bulk actions are available on the Journey Workspaces List screen only. Neither Journey Brokers nor Journey Applicants support bulk actions, nor can they be performed from any Details screen.

## Withdraw from a Details screen

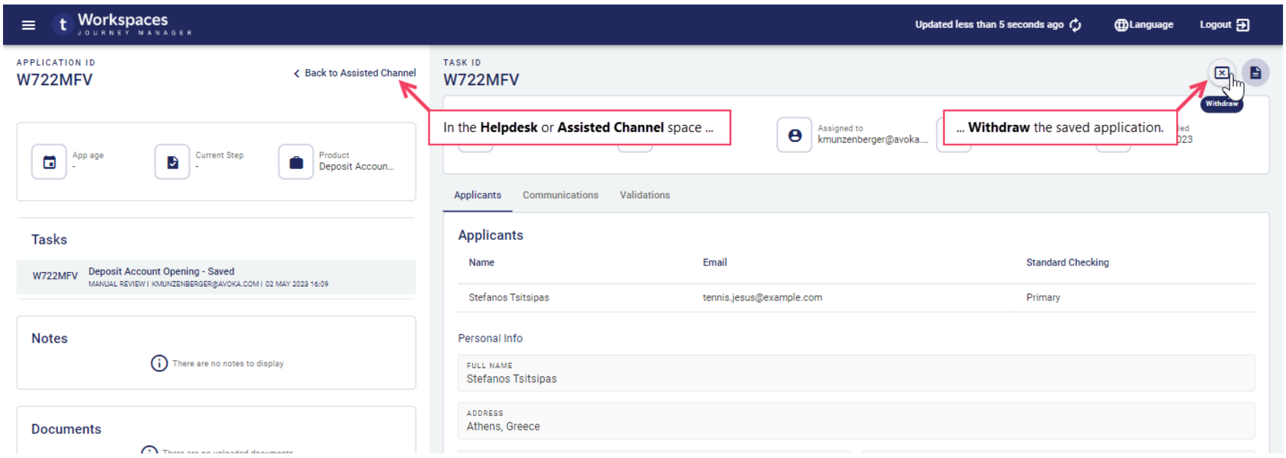
To withdraw an application from a Details screen :

1. From the Spaces navigation menu, select the Helpdesk or Assisted Channel space. The List screen is displayed.
2. In the item list, locate an application that you want to withdraw and select it. The Details screen for the selected application is displayed. When searching for an application, keep

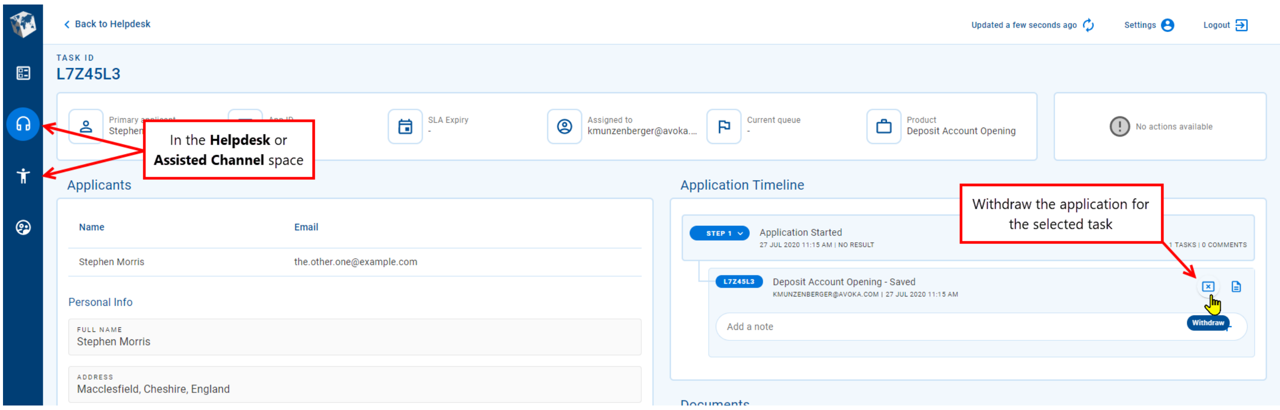
in mind that some application details may not be available if the application has not been filled in completely.

3. On the Details screen, click cancel_presentationWithdraw. The application is withdrawn, the available actions change, and a message confirming you have withdrawn the application is displayed briefly in the bottom-left corner of the screen.
    - 23.04
    - 20.05 to 22.10
    - Prior to 20.05 (EOL)

cancel_presentationWithdraw is located in the Actions group.

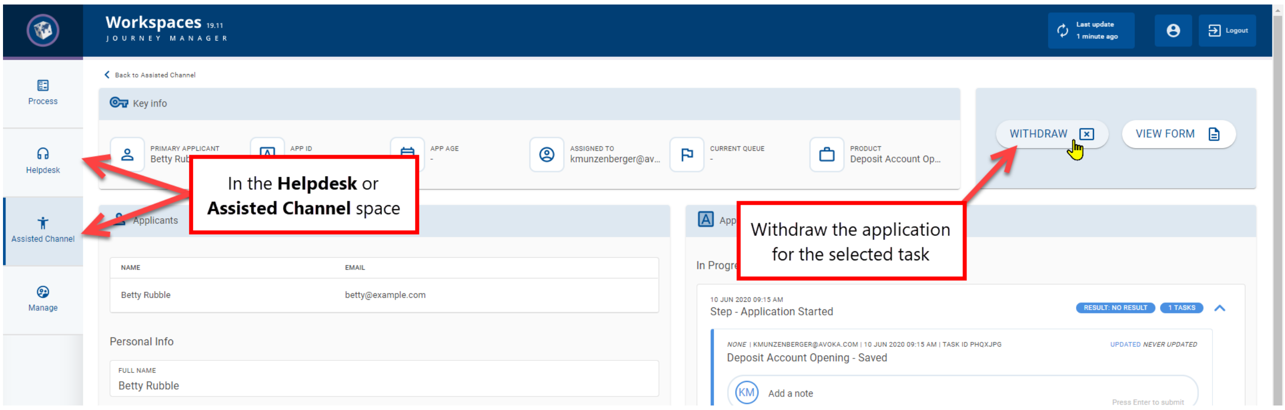



cancel_presentationWithdraw is located within the selected task in the application timeline.




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

The Withdraw button is located in the Action panel.



Workspaces 19.11
JOURNEY MANAGER
Process
Helpdesk
Assisted Channel
Manage
Back to Assisted Channel
Key info
PRIMARY APPLICANT
APP ID
APP AGE
ASSIGNED TO
kmunzenberger@av...
CURRENT QUEUE
PRODUCT
Deposit Account Op...
WITHDRAW
VIEW FORM
In the **Helpdesk** or **Assisted Channel** space
Withdraw the application for the selected task
Applicants
NAME
EMAIL
Betty Rubble
betty@example.com
Personal Info
FULL NAME
Betty Rubble
Step - Application Started
Deposit Account Opening - Saved
Add a note

# Workspaces Brokers Space Overview

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

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 [[[Undefined variable workspaces.space-brokers-fullname]]] — 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 Brokers 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 Brokers space?

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

Key features of the Brokers 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 Brokers 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 Brokers space experience.

The Brokers 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 Brokers space for?

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

## What's included?

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

## Browser Support

Journey Brokers 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 Brokers 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 Brokers experience.

# The Brokers Space Search Screen

NOTE

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

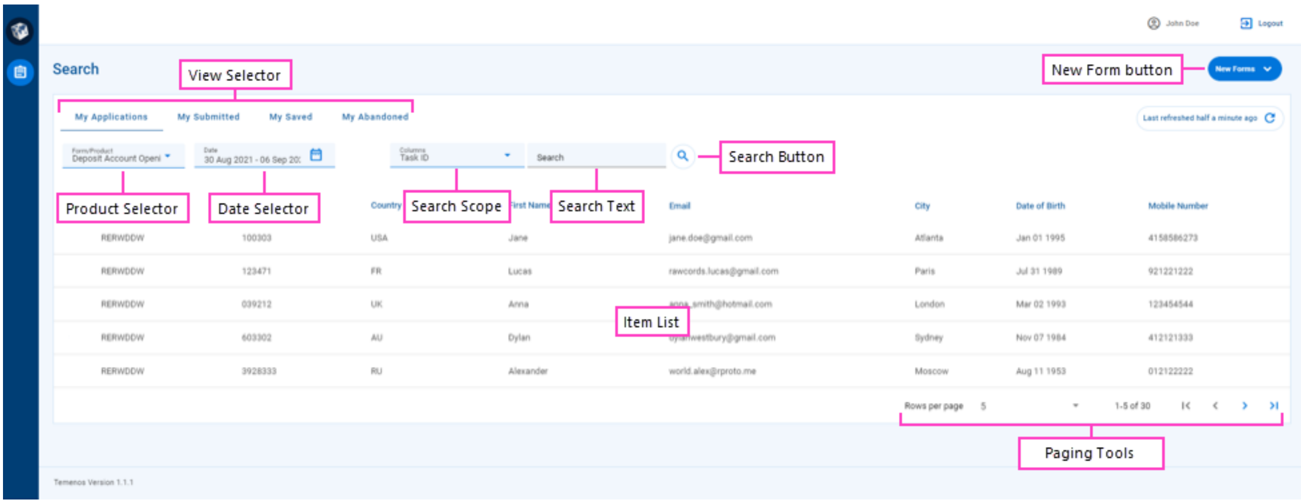
## Overview

When you select the Brokers 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 Brokers 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 Workspaces screens. 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 screens, displaying generic information and providing access to common features and menus.


1. Spaces navigation icon
2. Screen refresh
3. Language
4. Logout

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

- **Spaces navigation icon:** Click this icon to display a menu presenting the available spaces that you can select from to work in. 23.04This feature was introduced in the 23.04 release
- **Screen refresh:** When the information displayed on the screen was last refreshed, and an option to refresh it.
- **Language:** Select the language used for static text in the Workspaces UI. 21.11This feature was introduced in the 21.11 release
- **Logout:** End your current Workspaces session securely.

INFO

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.

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 beside the autorenewRefresh button. If the screen has not been updated recently or you just want to make sure you're looking at the latest information, click autorenewRefresh to refresh the screen.

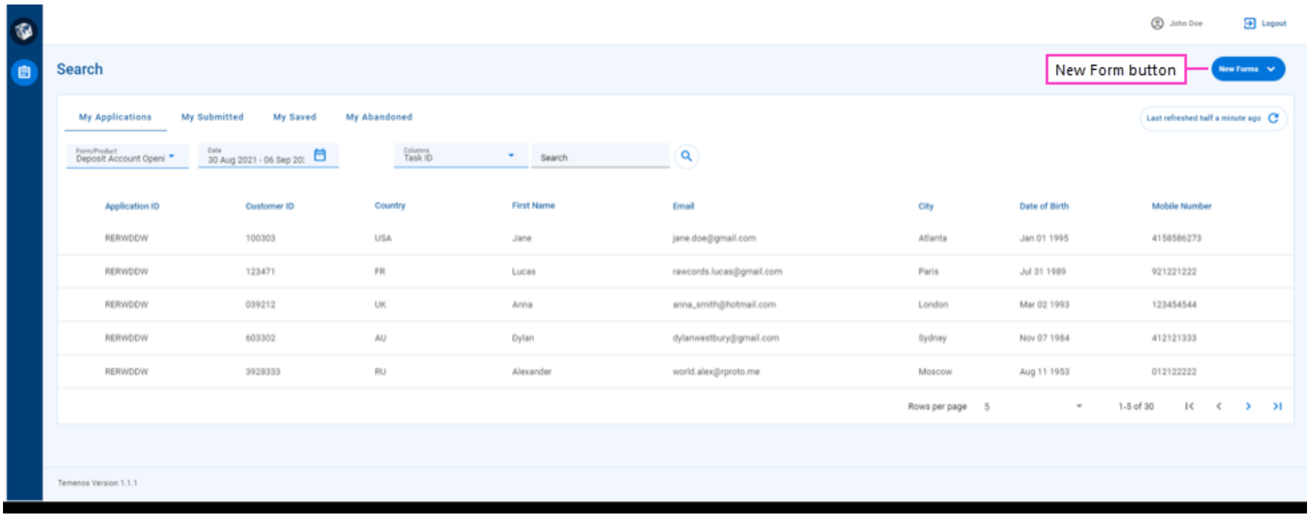
### User Profile (22.10 and earlier)

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



NOTE

The button labels and tooltips for the standard action types are configurable, so they may be different in your portal to what is shown in this documentation.

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 Brokers space may differ from the default configuration.

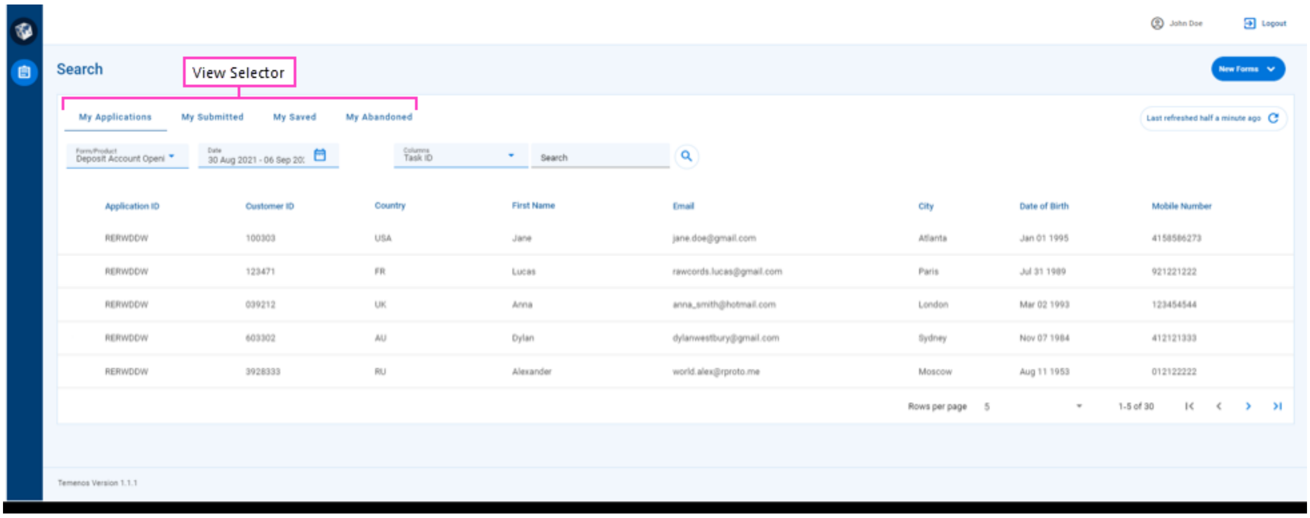
The items displayed in the item list satisfy a set of criteria that is determined by selecting a view then, optionally, further refining the list of items by selecting a product and/or a date range, or by searching for specific items. Items appear in the item list if they:

- 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 Brokers 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 Brokers 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)

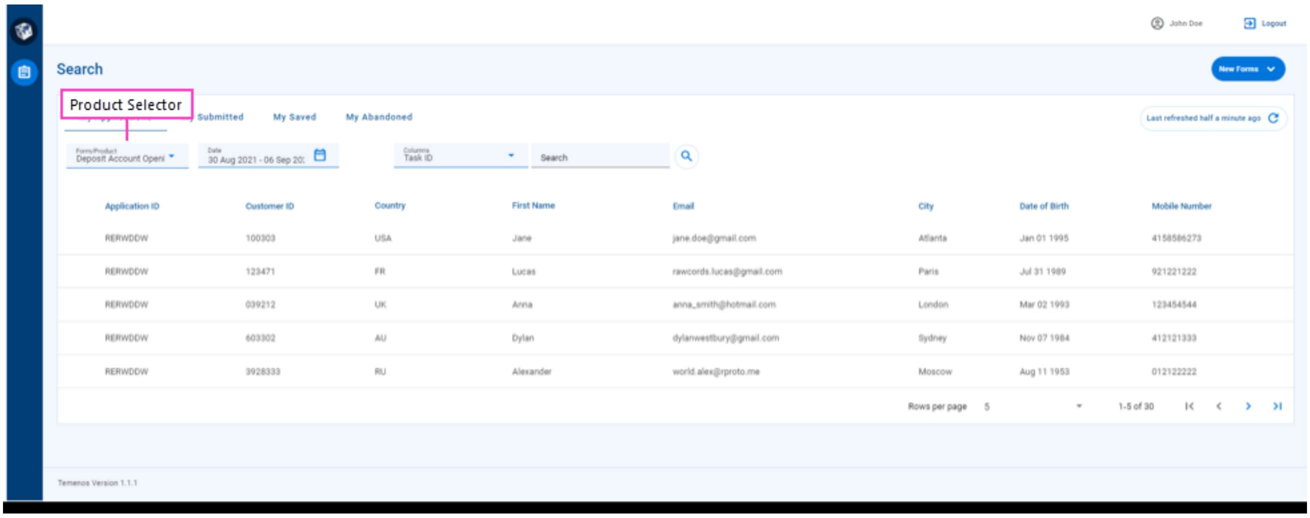
Each item in the View selector represents a view. Click an item in the View selector to make it the current view. When a view is selected, it's configuration is applied to the item list to restrict the items displayed. A color highlight provides a visual indication of which view is selected.

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 Brokers 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.

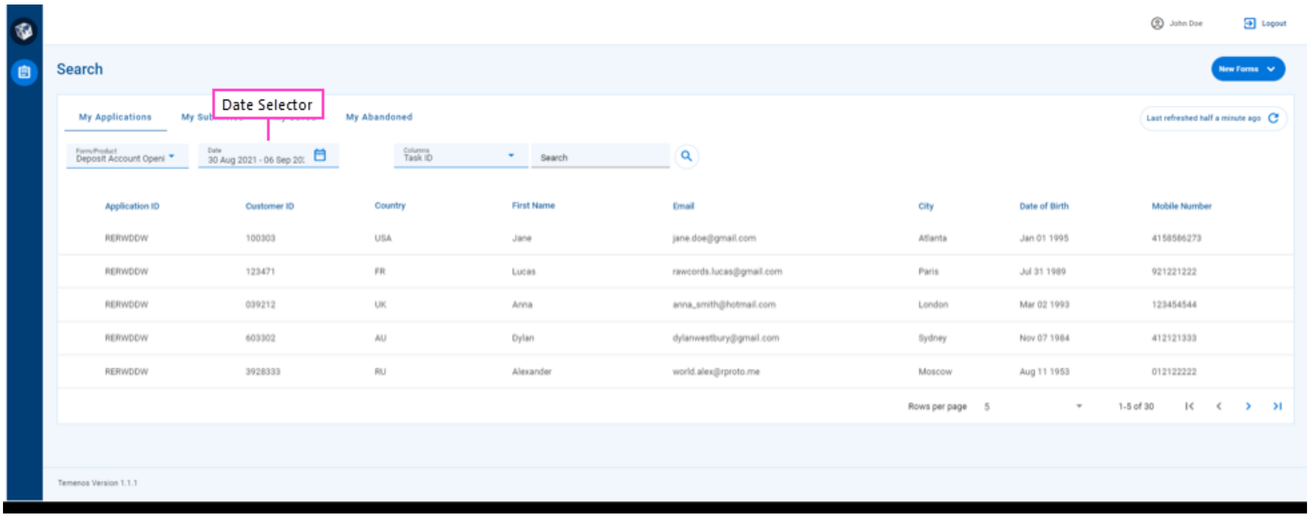



The available products are listed in the Product selector’s dropdown list as well as an All item. You can choose any product from the dropdown list to restrict the items displayed in the item list. If you choose All, the item list is populated with items for all products.

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, Brokers 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.

## Search and Sort

### 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.

Searching is case-insensitive, treating uppercase and lowercase characters as the same, and only finds items that match the search text exactly (ignoring letter case). Partial match is not currently supported.

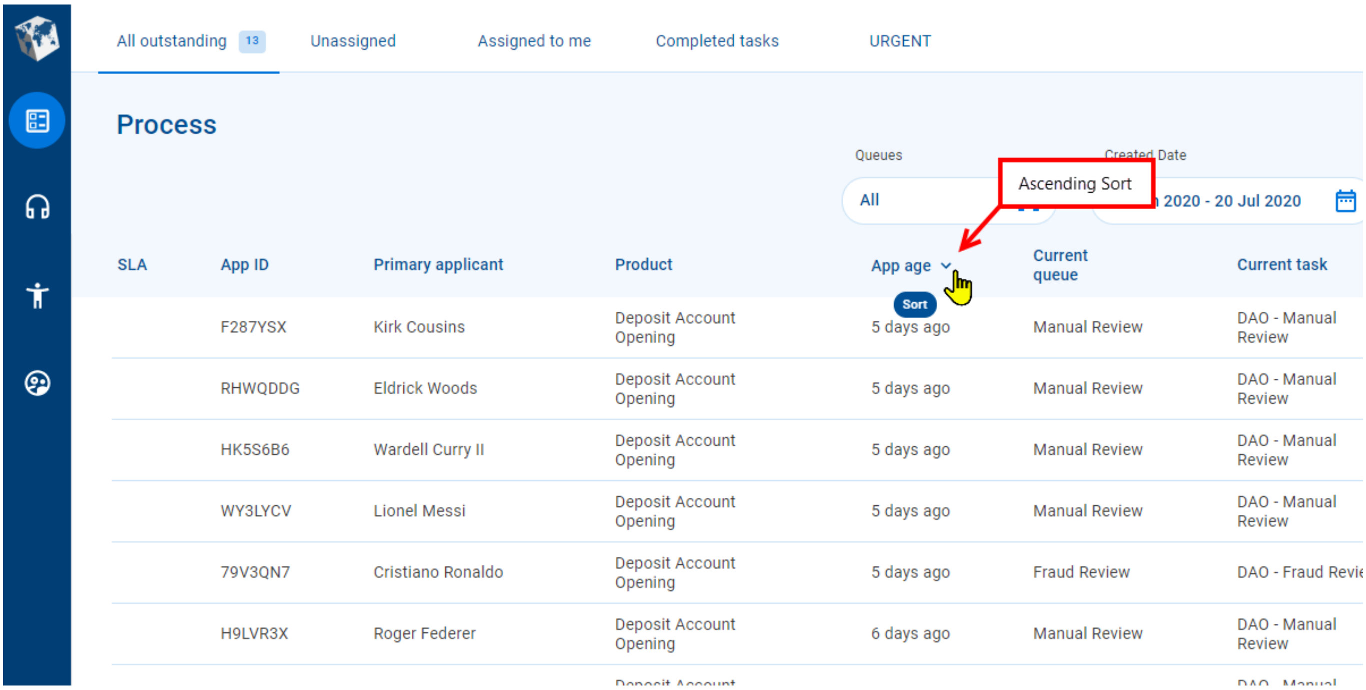
When a search is active, the items displayed in the item list satisfy the current view and filter selections as well as the search criteria. A search remains active until you clear it. Note that simply deleting all of the search text in the searchSearch box does not clear an active search. To clear a search,

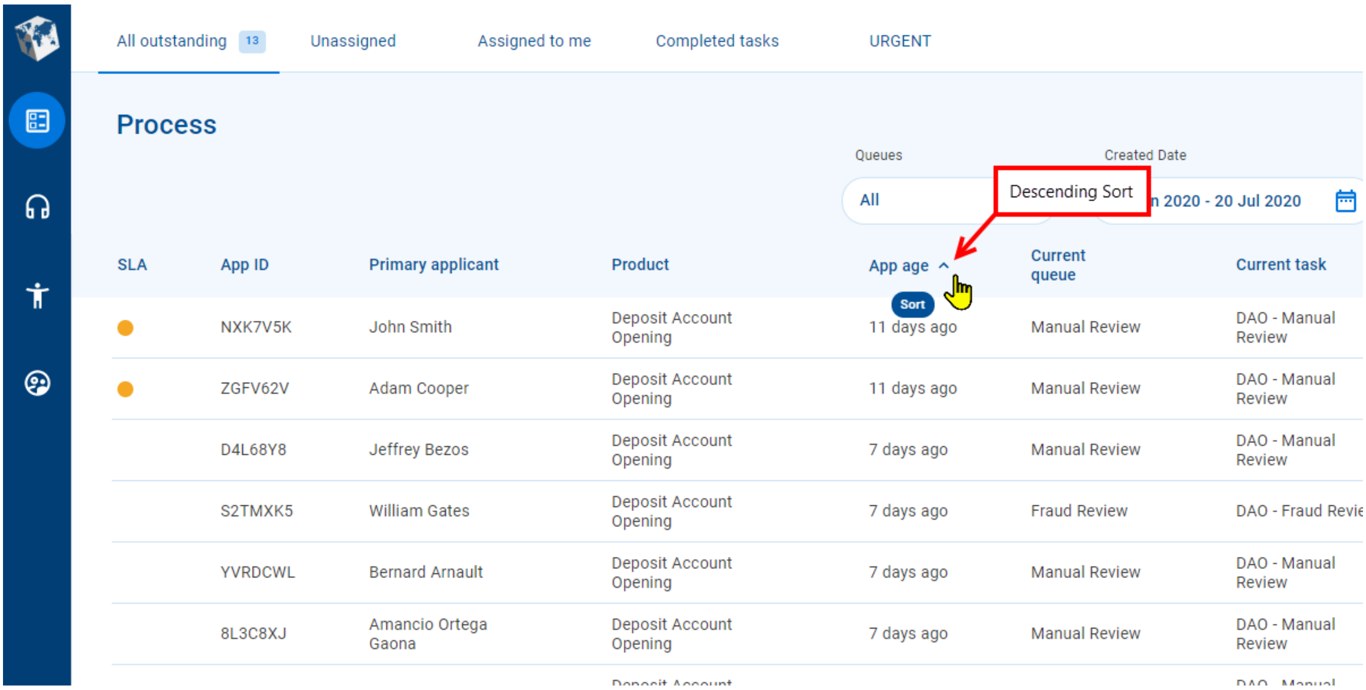
If you select an item in the item list while a search is active, when you subsequently return from the Details screen to the List screen, the search will still be active. You can tell that the search is still active by the text and the closeClear Search icon in the **Search** field.

### 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 expand_moreSort Ascending icon indicates the item list is sorted by the column values in ascending order, while expand_ lessSort Descending indicates items are sorted by the column values in descending order.

- [Sort – Ascending order]()
- [Sort – Descending order]()

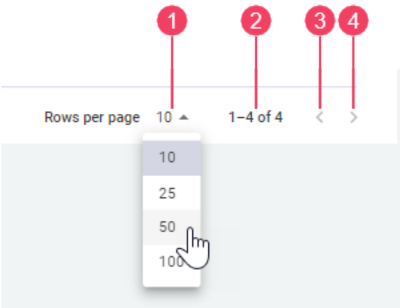



You can determine whether a column is available to use for sorting by pointing your cursor at a column heading. If your cursor changes to the hand pointer and a "Sort" tooltip is displayed, you can sort by the column. To change the sort order, click the column name. If you click the column name for the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




1. Rows per page
2. Items in list / Total matching items
3. Previous Page
4. Next Page

The navigate_beforePrevious Page and navigate_nextNext 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_beforePrevious Page tool is disabled when the first item list page is displayed; similarly, the navigate_nextNext 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.

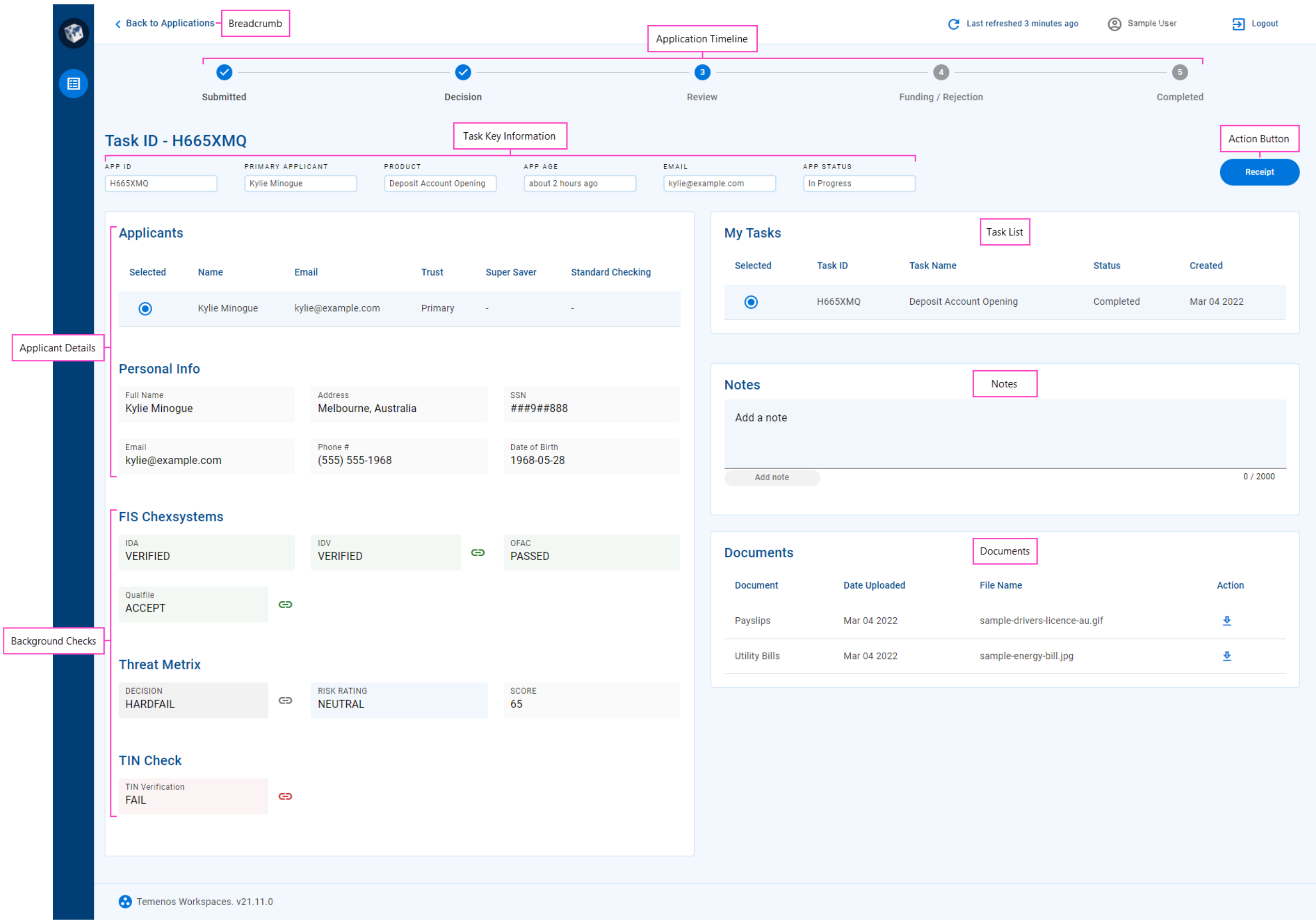
# The Brokers Space Details Screen

NOTE

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

## Overview

The Brokers 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 Brokers 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 Brokers 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.

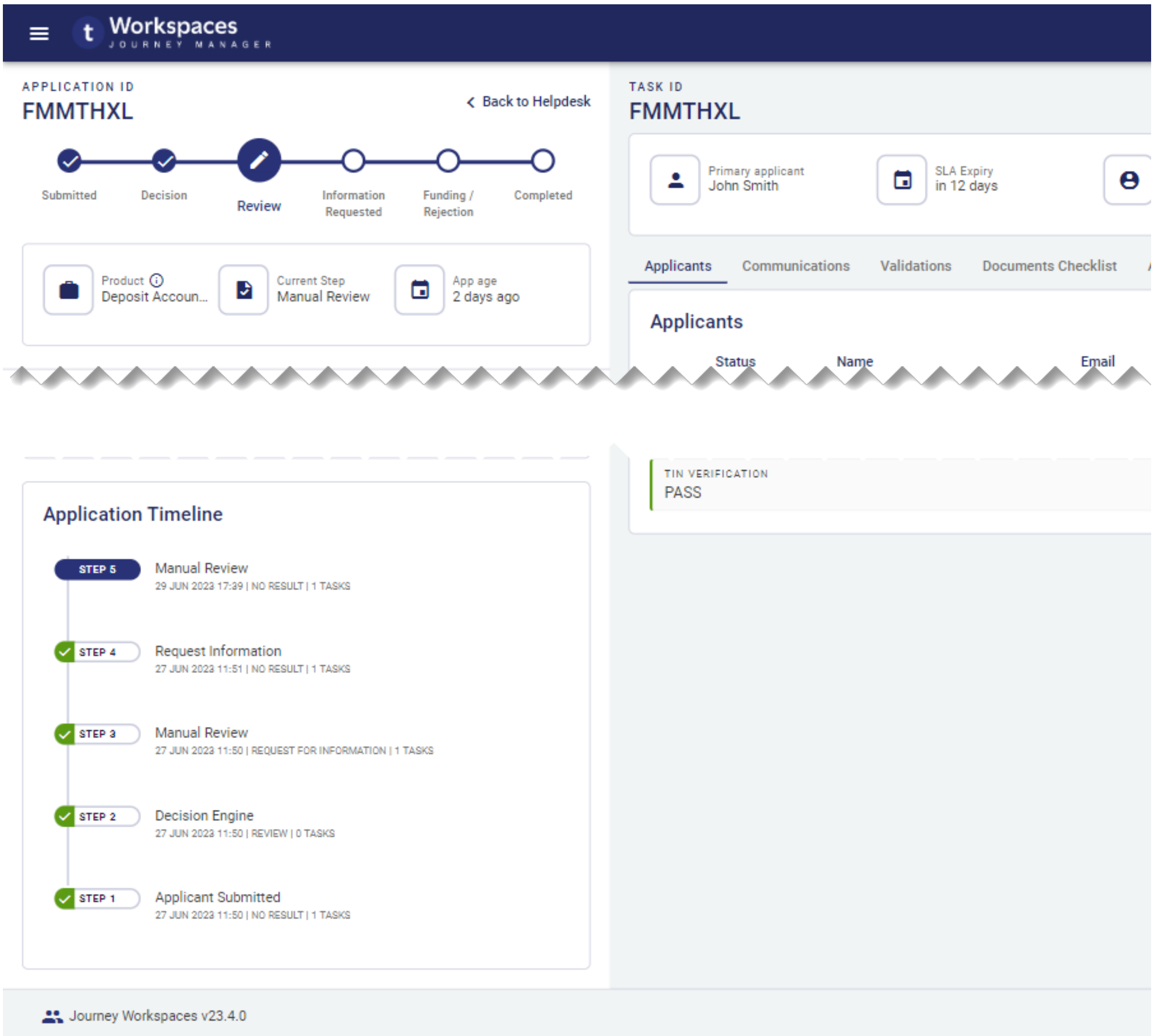
To return to the , click the Back to ... link at the top of the screen, or click an item in the Spaces navbar.

## Progress stepper

The progress stepper presents a high-level overview of application progress against significant milestones in the application life cycle. The progress stepper is hidden for saved applications, becoming visible once an application has been submitted.

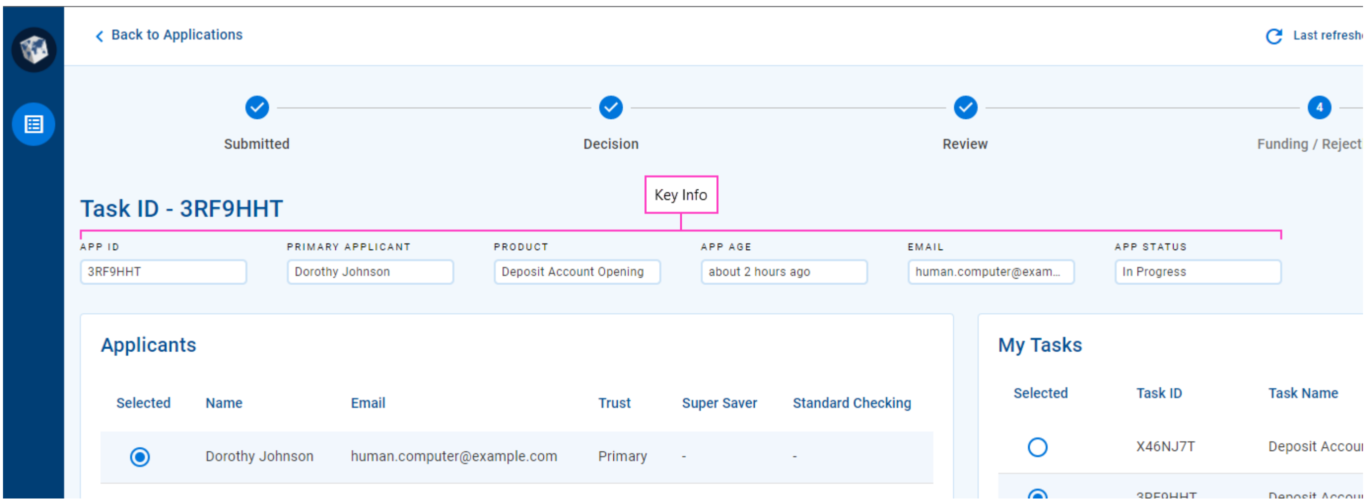
> INFO
>
> If you need to see more application processing details, the application timeline shows the exact steps performed.

Current, completed and pending steps are differentiated visually, allowing the user to see the progress of submitted applications at a glance. Steps to the left of the current step are shown as completed even if they were skipped, while steps to the right of the current step are shown as pending even if they have been completed. For example, the following screenshot shows an application that is being reviewed for the second time after requested information has been provided. The progress stepper shows the Information Requested step as pending even though it has been completed because it is to the right of the current step, while the application timeline shows all steps the application has been through; in particular, the two Manual Review steps.




## Key Information

The Key Information card displays important task information that's handy for Brokers 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 shows a single value but this can be limiting for some kinds of information. To improve this situation, additional information can be displayed in a tooltip. When available, a tooltip is indicated by a infoTooltip icon. To view the tooltip, point your mouse at the infoTooltip icon. 22.10This feature was introduced in the 22.10 release

As an example, say you have an application type covering multiple optional products and you have a Product key info item. If an application includes multiple products, only the first product is displayed in the Product key info item. In this scenario, a tooltip could be configured to show all products included in the application.

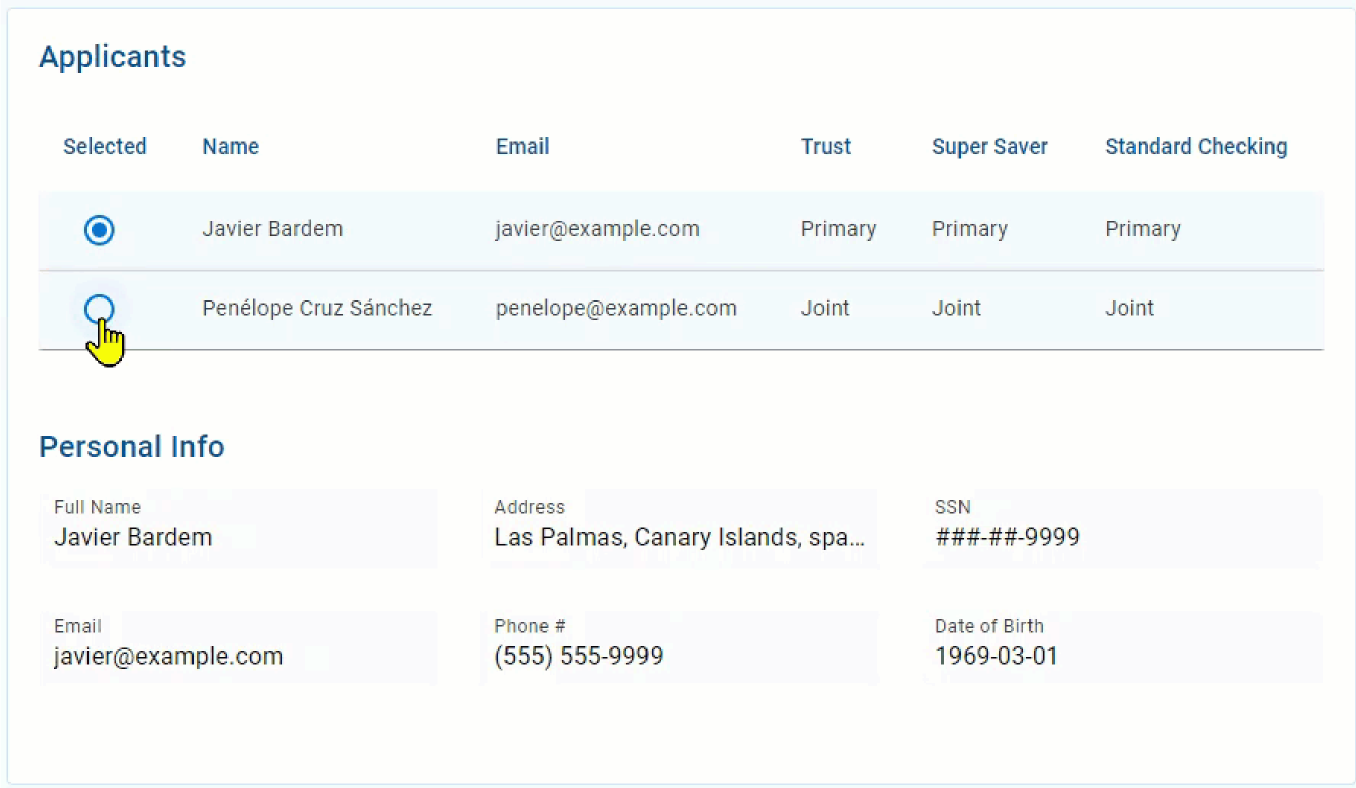
The value displayed in the Product key info item may correspond to a form group. If this is the case, the specific form associated with the task is displayed as the Product. | 22.10 This feature was introduced in 22.10.

## 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 [[[Undefined variable workspaces.concept-background_check-plural]]] that are critical in successfully processing the application. In the Brokers space, this information is displayed in the Applicant Details card.

---

[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.

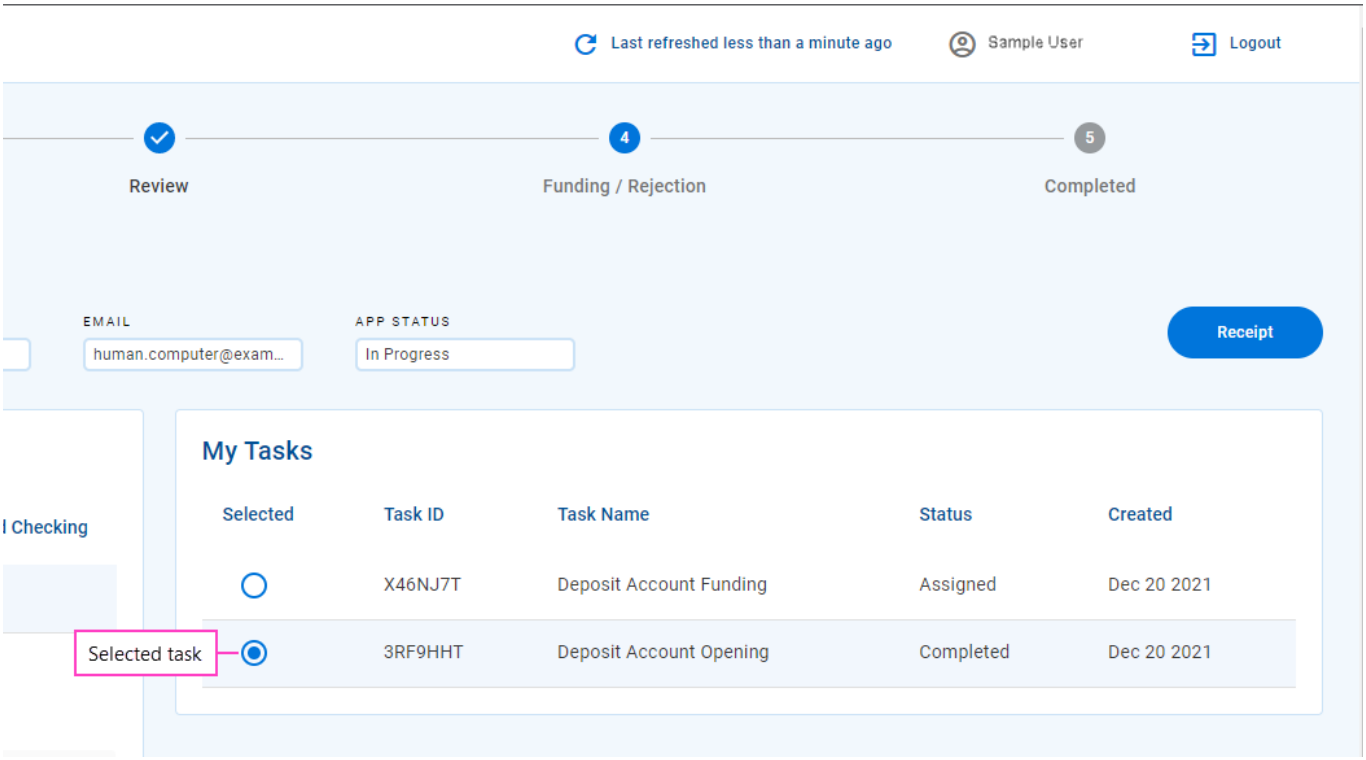



At the top of the card is an Applicants section listing all of the applicants associated with the application. This section displays key applicant-related information for each applicant including their name and email address. Select an applicant from this section to display more information for that 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 Brokers 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 [[[Undefined variable workspaces.concept-background_check-plural]]] 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

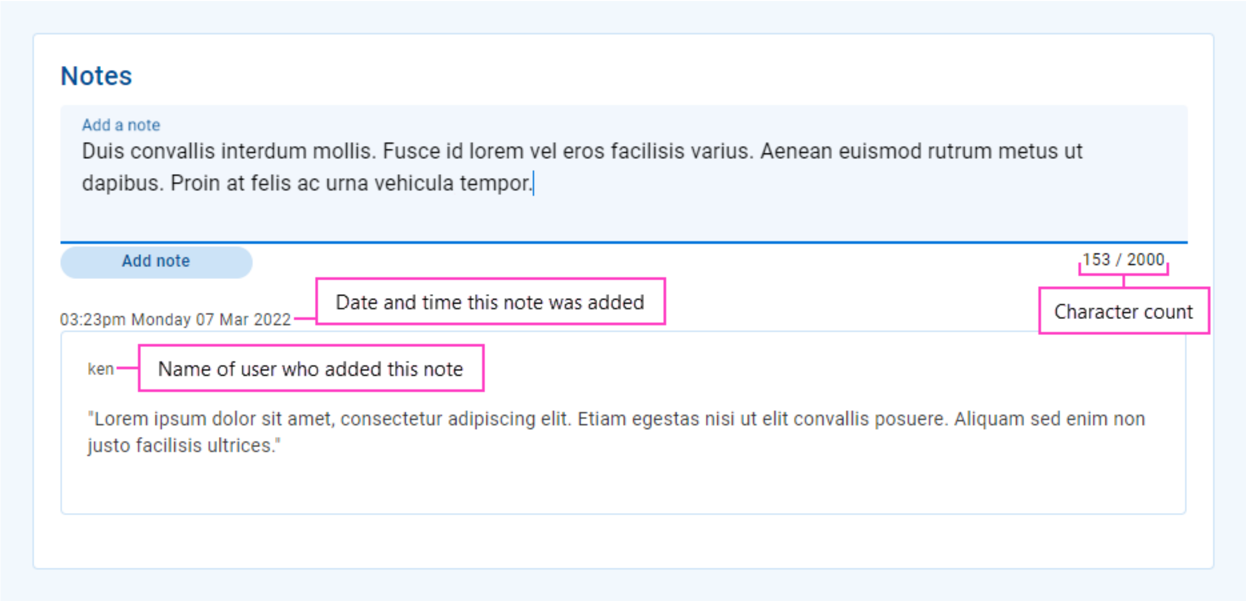
Throughout the life cycle of an application, there may be times when an applicant needs to provide additional information to the bank staff processing their application. Both Workspaces and the Brokers space support this kind communication.

In the Brokers 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.



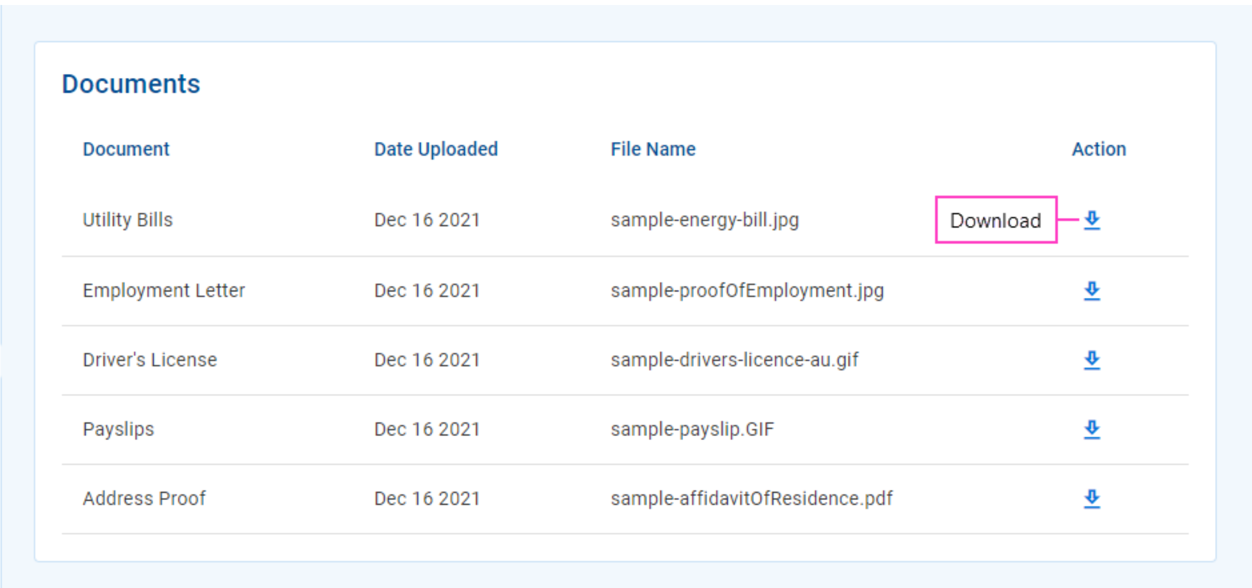

Both Workspaces and the Brokers space allow users to add notes to an application. Any notes added by the applicant appear in the Notes card, and can be viewed by bank staff in Workspaces via the View Notes action. However, notes added by bank staff in Workspaces cannot be viewed in the Brokers space.

## 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 Brokers 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.
- **link**View detail**:** Available for supported document types only. On the right-hand side of each document item is an icon that you can click to view the document in a modal window. Supported document types are: JSON, XML, HTML, PDF, and some image formats (JPEG/JPG, PNG, GIF). 23.10This feature was introduced in the 23.10 release
- **vertical_align_bottom**Download**:** Available only if linkView detail is not available. On the right-hand side of each document item is an 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

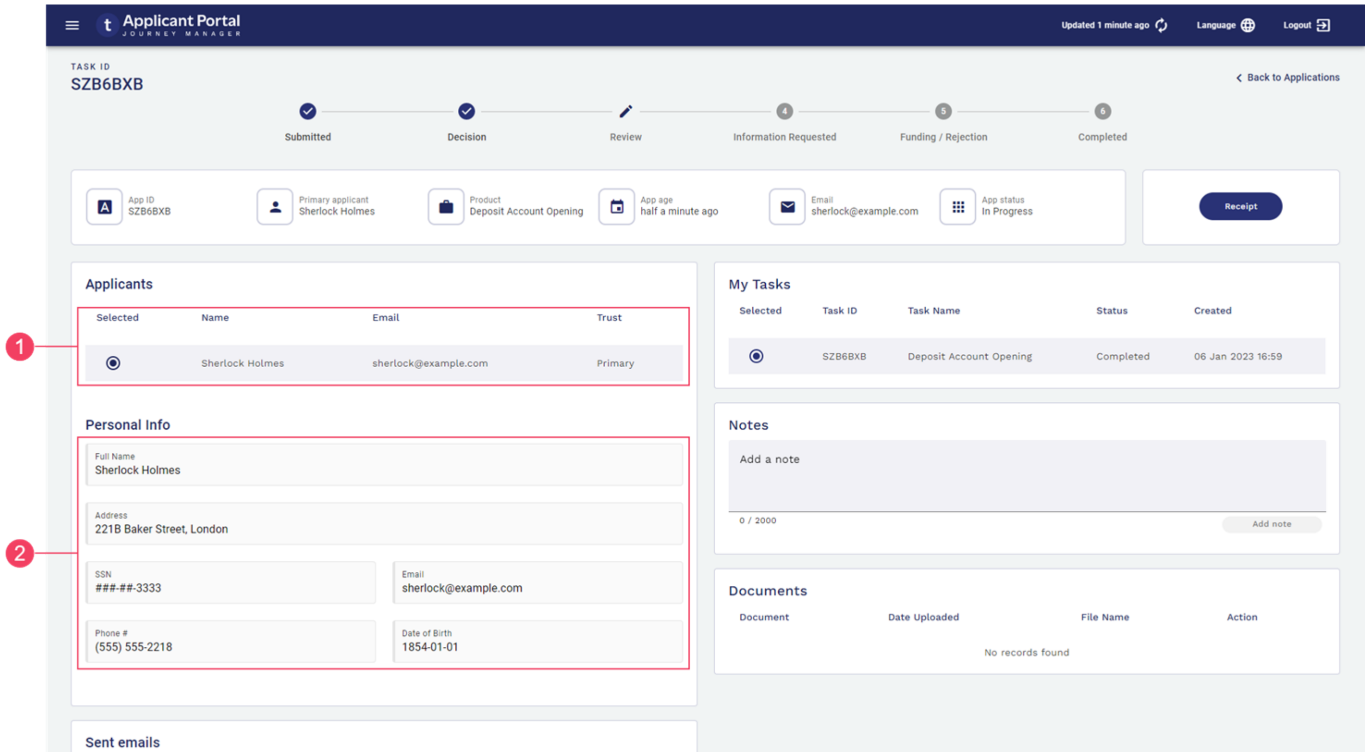
As a Journey Brokers user, the only document-related action you can perform is to download it. You cannot change the way documents appear on the Documents card, nor can you upload or manage documents attached to an application.

## Custom information

Much of the Workspaces user interface presents various types of content (information and features) in components or layouts specifically designed for each content type. In addition to the standard content types described above, your Journey Brokers portal may also be configured with additional custom content specific to your organization. While custom content is more commonly available on the Details screen in separate tabs 22.10This feature was introduced in the 22.10 release, you may also find it used on the List screen in expansion rows.

Workspaces supports two format options for custom content, designed for two different kinds of data:

- **Multi-value data:** Content is displayed in a table, with a header row at the top followed by one or more data rows. Each column represents a different kind of content, identified by the column header, while each row relates to a single entity such as an applicant, a background check, or a document. Each individual data item is either a simple text/number display or an icon button that links to additional details or functionality. All data items in the same column are of the same type.
- **Single-value data:** Each data item in a container (such as a tab, card or section) is displayed separately, with a label and value, and an optional icon button that links to additional details or functionality.




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

INFO

Custom content presents a read-only view of a predetermined data set. A Journey Brokers user has no control over the way the data appears, nor can they modify the displayed information.

Several icon types are supported for icon buttons in custom content:

- **link**Detail Link**:** Indicates additional details are available to view. Click the icon button 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 button 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 button to perform the associated action. 22.10This feature was introduced in the 22.10 release

## No Data Scenario

Sometimes, data may not be available in 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 from being able to obtain the data. 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.

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

## Brokers Space Actions

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

The standard actions in the Brokers space are:

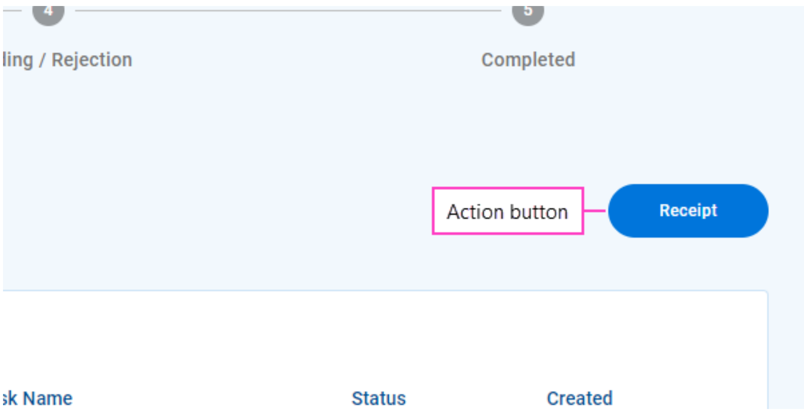
- **Receipt:** See a read-only view of a submitted application.

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.

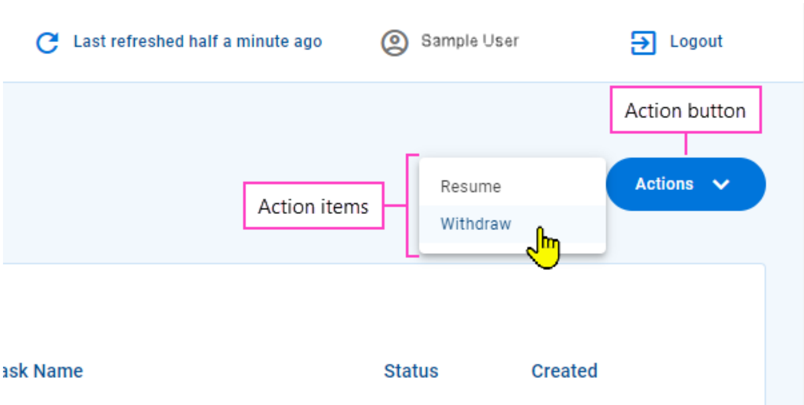
> NOTE
>
> You can start a new application from the Search screen.

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.

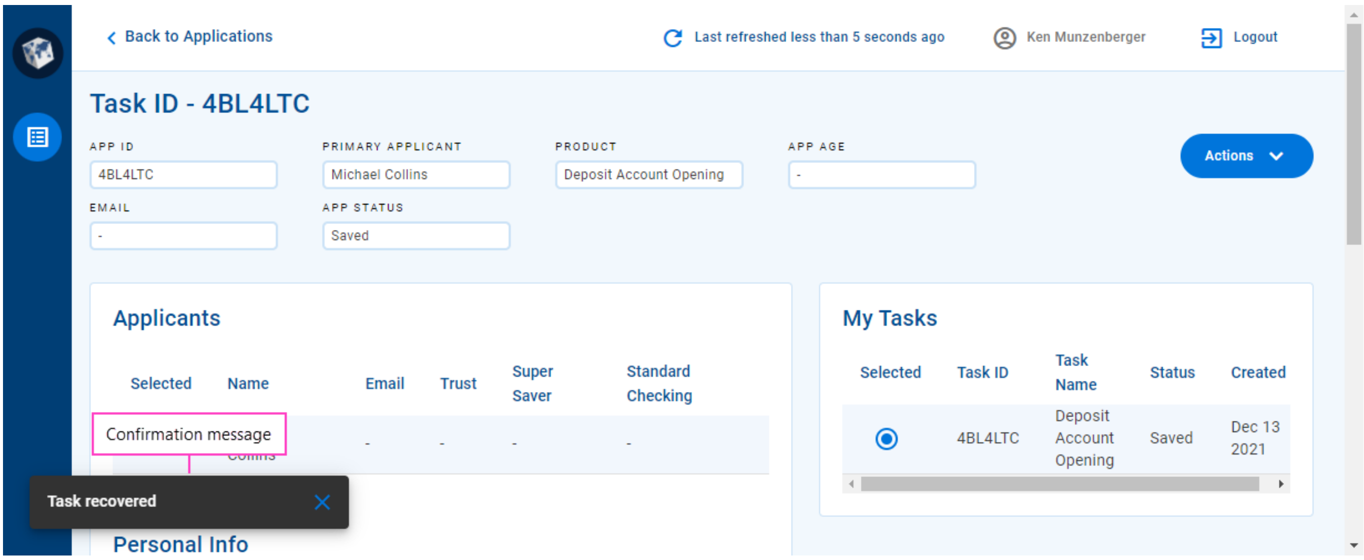



Different actions may be available for each task because the actions that can be performed on a task at any time depend on several factors including the task's current state. For example, the Recover action will be available only for an application that has been abandoned.

NOTE

The button labels and tooltips for the standard action types are configurable, so they may be different in your portal to what is shown in this documentation.

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.

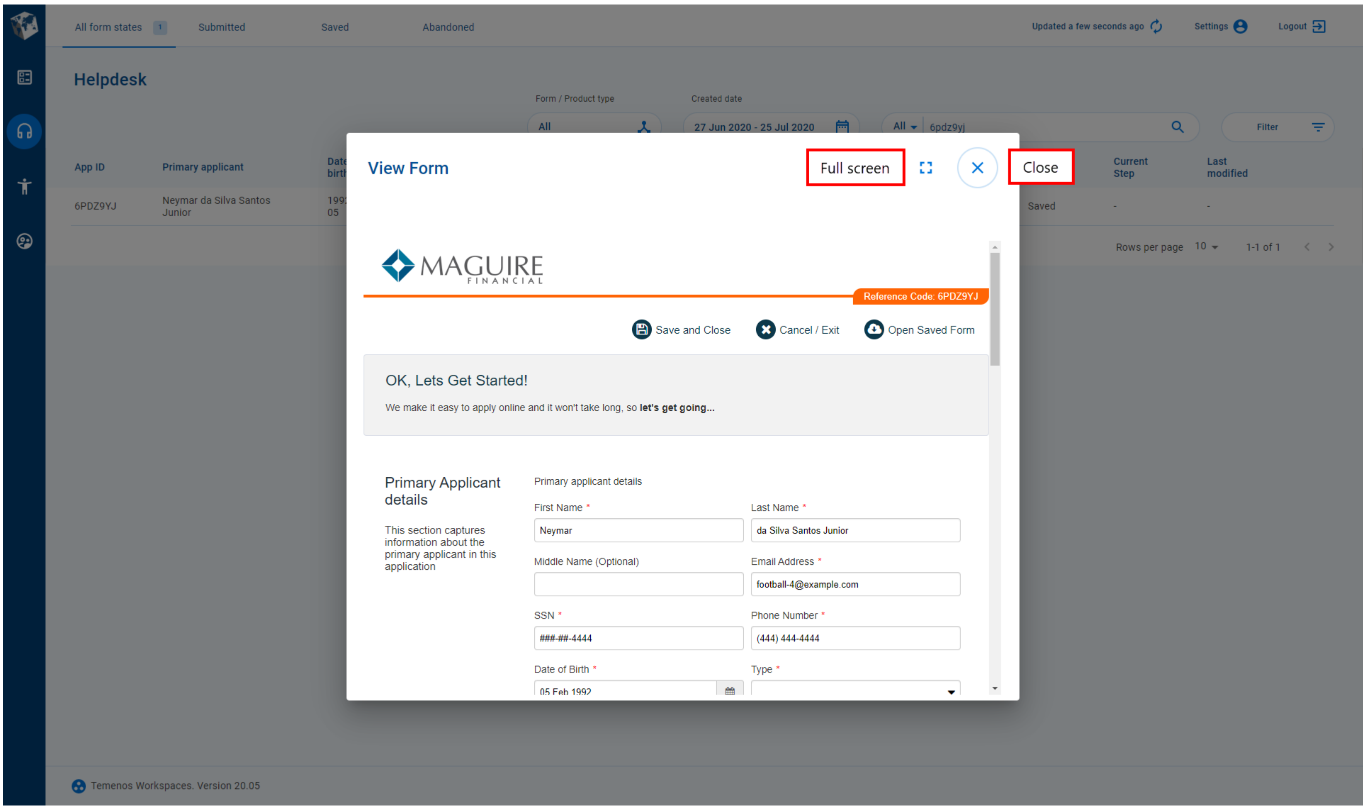


## Resume an Application

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.

INFO

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: Re-open an application form.

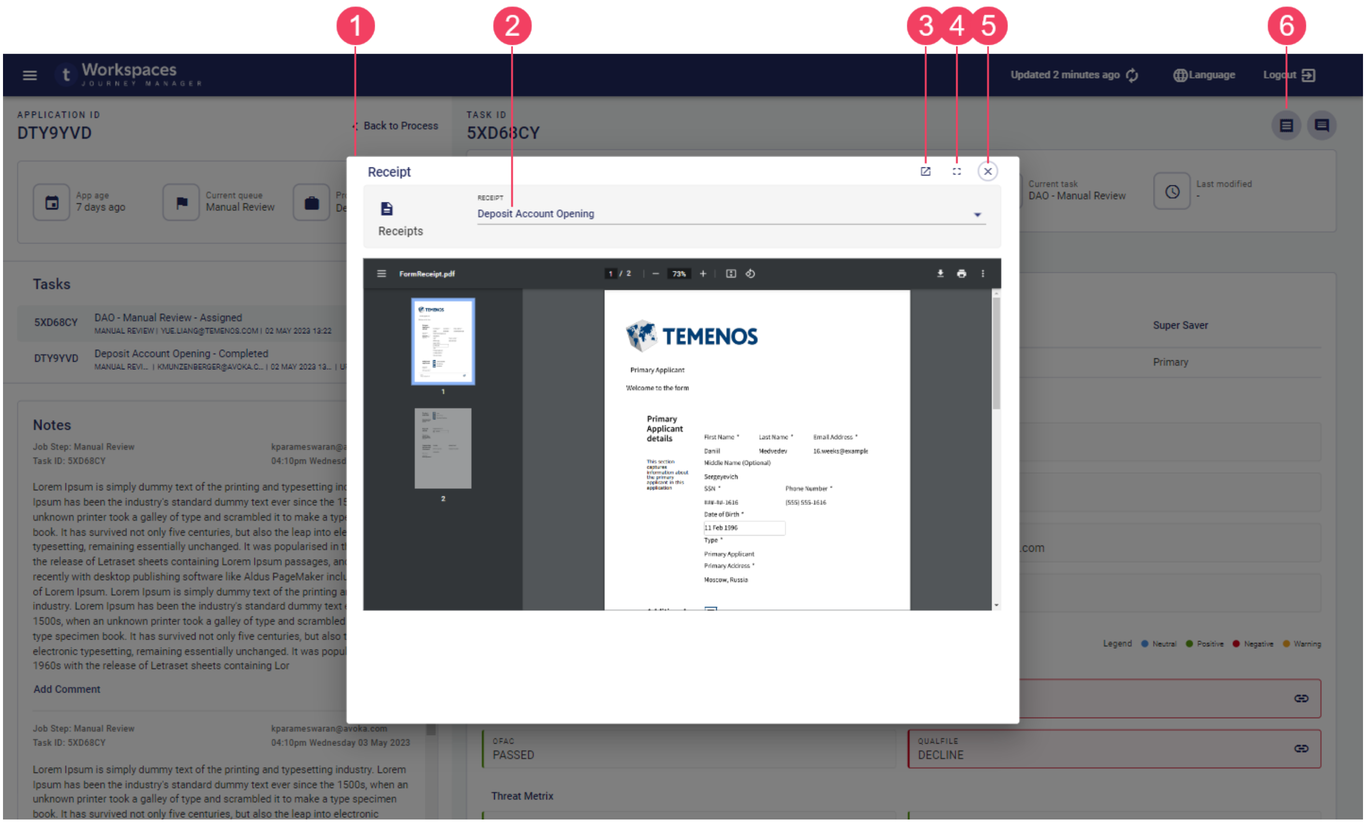
### View a Receipt

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.

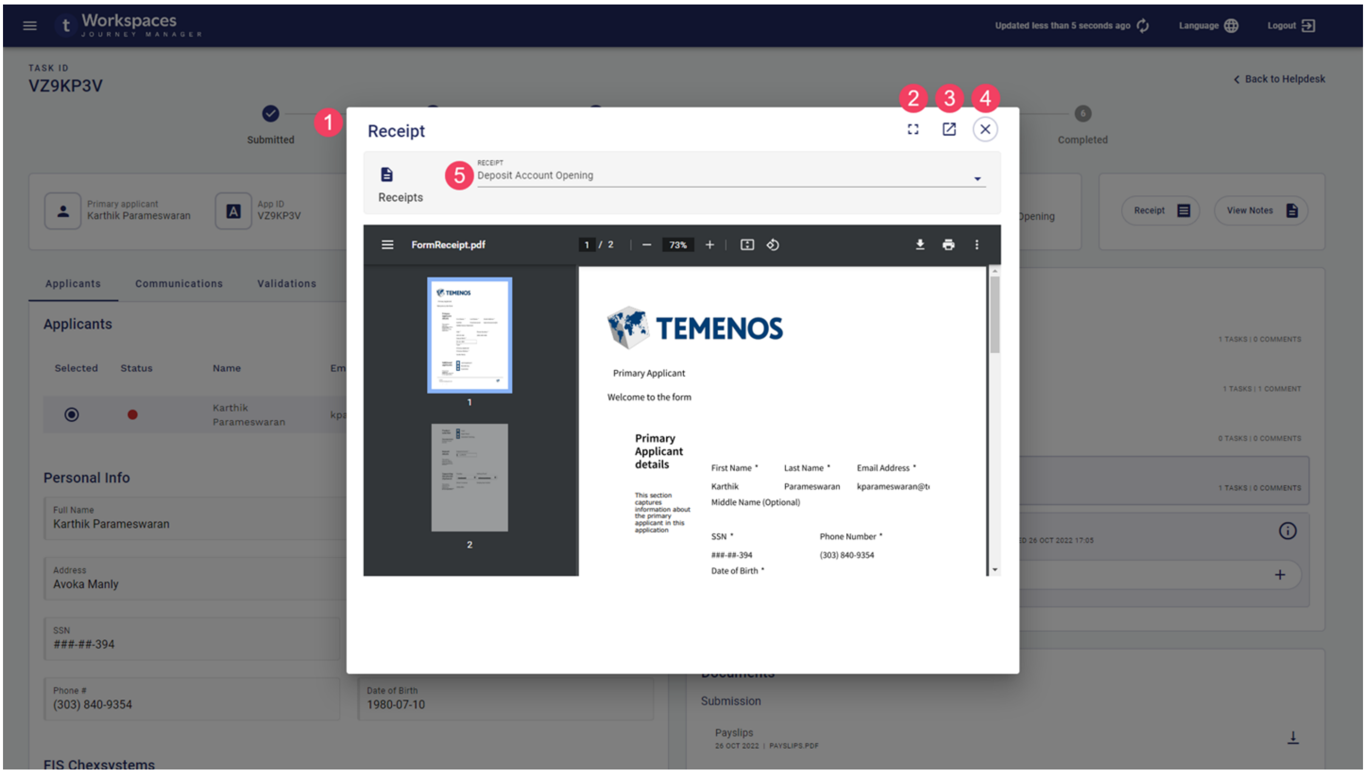
TIP

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

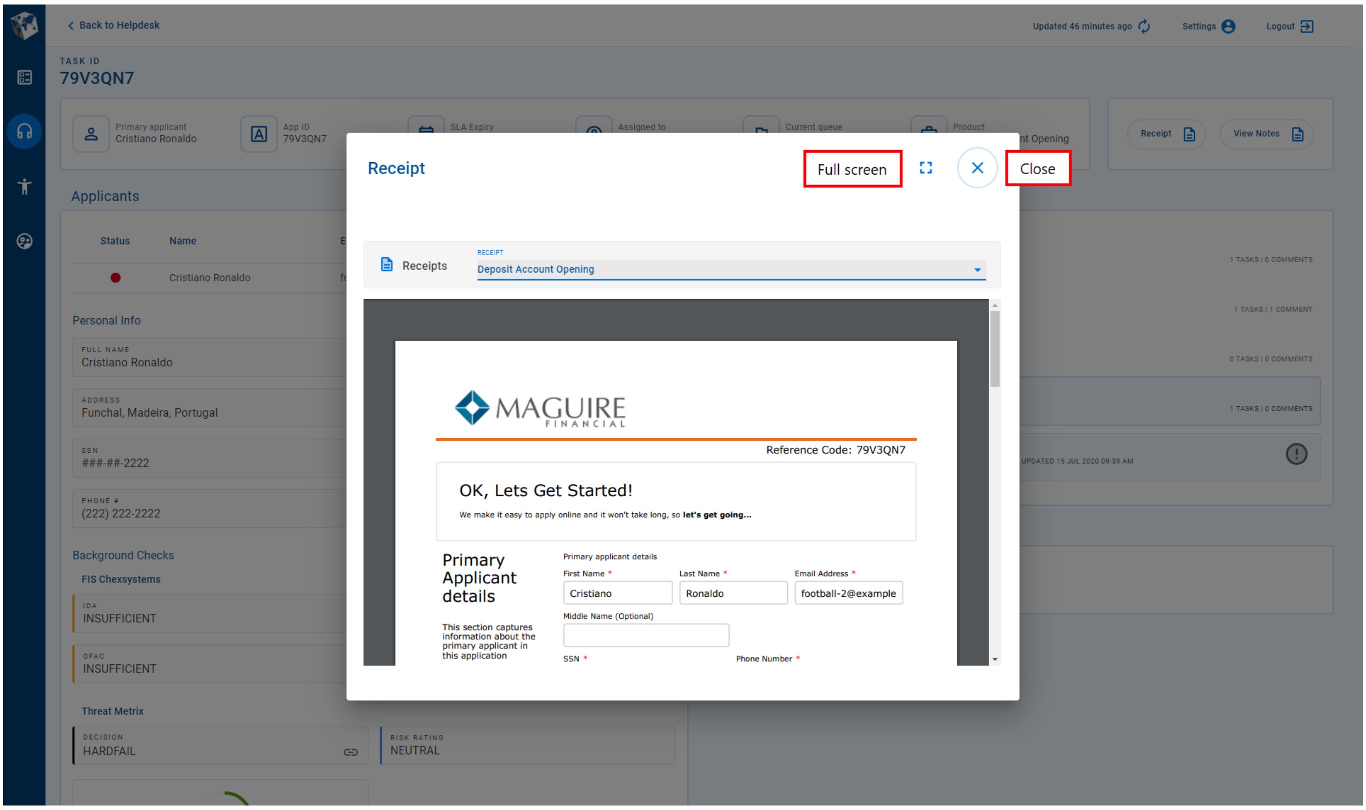
- 23.04
- 22.10
- 22.04 and earlier



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




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. | 22.10This feature was updated in 22.10.

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

## Recover an Application

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.

For more information about recovering applications, see Recover an abandoned application.

### Withdraw an Application

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

For more information about withdrawing applications, see Withdraw an unsubmitted application.

# Workspaces release compatibility

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 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

[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.

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 21.11 breaking changes:** The Workspaces REST API packaged with Journey Manager 21.11 introduced changes incompatible with Workspaces 20.05 and earlier. For more information, see Breaking changes in TJM 21.11.

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

| Workspaces release | TJM release compatibility | Incompatibility issues |
|---|---|---|
| 22.04 | Compatible with all supported TJM product suite releases.[1] | • CSRF token issue |
| 21.11 | • Compatible with all supported TJM product suite releases.<br>• Compatible with Workspaces REST API 21.11 and earlier. | • CSRF token issue<br>• TJM 21.11 breaking changes |
| 20.05 | • Compatible with all supported TJM product suite releases.<br>• Compatible with Workspaces REST API 21.11 and earlier. | • CSRF token issue<br>• TJM 21.11 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 may be due to a CSRF token implementation.

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.

---

[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.

NOTE

To avoid incompatibility issues when using CSRF tokens to mitigate CSRF attacks, your Maestro version must be the same as or later than your Manager version. For the best experience, we recommend using Manager and Maestro from the same release.

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.

### 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 21.11

Changes to the Workspaces REST API introduced in TJM 21.11 (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 21.11 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.

# How to use the Journey Workspaces 23.10 demo

Every Journey Workspaces portal comes with a pre-defined configuration that makes all Workspaces features available via controlled user access to a set of role-specific spaces. While this default configuration can be used as the basis for your own Journey Workspaces portal, you need additional elements like forms, roles and users in order to access the spaces and features in a meaningful way. The Journey Workspaces demo provides these additional elements in a sandboxed organization, giving you everything you need to experience the full application journey from start to finish in a safe environment that won't interfere with development and production systems.

This topic describes the application journey demonstrated in the video Workspaces: An Application Journey. This video follows an application as it takes a journey via Workspaces from creation to completion. This journey passes through several stages, each of which focuses on an activity that involves specific Workspaces users, spaces, and features.

- Start an application in the Assisted Channel space.
- Initial application processing in the Review and Document Requests spaces.
- Interaction between the applicant and processing staff about uploading required documents.
- Provide customer support in the Helpdesk space.
- Perform application management activities such as task assignment in the Manage space.
- Complete application processing: create a review checklist, re-run background checks, and approve the application.
- Applicant completes funding of the application.

## Getting started

The Workspaces demo can be set up in your Journey Manager environment so that you can investigate all that Workspaces has to offer. Contact your TJM representative to request a Workspaces demo in your Journey Manager environment.

### Demo users

At the core of the Workspaces demo is a set of user ids that provide access to various spaces. Each space in turn provides access to features and a subset of application data that are relevant to the role performed by the user. The demo user ids are as follows:

| Role | User ID | Available spaces |
|---|---|---|

| | | |
|---|---|---|
| Assisted Channel* | `assist.staff@example.com` | Assisted Channel |
| Helpdesk | `helpdesk.staff@example.com` | Helpdesk |
| Application Processing | `process.staff@example.com` | Review, Document Requests |
| Manager | `manager@example.com` | Manage |

* In some regions, this role corresponds to a relationship manager.

In addition to these space-restricted user ids, there is a super-user user id (`super.user@example.com`) that has access to all of the spaces mentioned above.

TIP

The default password for all users is: `!n!t!@lP@$$w0rd`

As shown above, most of the users created for this demonstration are configured with access for just one space. This allows us to focus on role-specific features and workflow as we move through the demonstration. A consequence of this is that the menu Spaces navigation icon is hidden most of the time, only being displayed when multiple spaces are available.

### Accessing a Workspaces portal

To access a Workspaces portal, you need to find the portal's form URL in Journey Manager and browse to it.

To find a portal's form URL, follow these steps.

1. Login to Journey Manager and select Forms > Forms.
2. Locate Journey Workspaces in the list of forms.
3. On the same row, click Form Test Render

   Alternatively, you can copy the URL from the Form Test Render icon. For example, in Google Chrome, right-click Form Test Render and select Copy link address from the menu.

The same steps can be used to find the Journey Applicants portal's form URL by locating Journey Applicants at step 2 instead.

Once you have the portal's form URL, paste it into a new browser tab or window to access the portal.

### Conventions

Conventions used in this topic are designed to help you understand where you are in the demo.

- Throughout the demo, you will need to login as different users. To help you identify when you need to switch to a different user, look for the loginLogin and logoutLogout icons.

  NOTE

  You need to clear your browser's application cache each time you login using a different user id. This is because Workspaces stores data in the application cache that is incompatible between different users.
  While this can cause problems in a Workspaces (demo) system where you login with different user ids in the same browser, it is not an issue in a production system where each user logs in to their own computer with their own user id only.

- Each time you need to login as a different user or switch to a different space, we'll show you a graphic like this:

  personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

  The items displayed are:
  - person A role and the corresponding user id to login with.
  - space_dashboard An app in the Journey Workspaces suite.
  - rate_review A space in Journey Workspaces (omitted for Journey Applicants).

  This provides context for which portal and space you're in and who you're logged in as. You can match these graphical elements to similar ones in the video.

## Start an application

The application journey begins in the Assisted Channel space. Follow these steps.

*local_library*

To learn about the Assisted Channel space, see Workspaces Assisted Channel.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Assisted Channel user.

   personAssisted Channel (`assist.staff@example.com`)space_dashboardJourney Workspacesaccessibility_new Assisted Channel

The Assisted Channel space is selected because this is the only space available for this user.

*local_library*

To learn about spaces, see [Workspaces core concepts > Roles and spaces].

2. Start a new application.
*local_library*

To learn about starting an application, see [New Form: Start a new application].

INFO

The demo application form is US-centric; for example, it uses SSN and US-format phone numbers. If you're interested in having a demo application form for another locale, contact your TJM representative to register your interest.

3. Fill in the application form.

At the Deposit details page, enter an amount between $1,000 and $100,000 to progress the application to the manual review step.

NOTE

In the demo system, the amount entered on the Deposit details page controls the application journey as follows:

- **< $1,000:** The application is rejected.
- **> $100,000:** The application is approved.
- **Otherwise:** The application proceeds to the manual review step.

When you reach the Supporting documents (Optional) page, don't upload any documents for now. We'll come back and do this later.

Save the application and close the modal window.

*local_library*

To learn about modal windows, see [Workspaces UI tour > Modal windows].

Closing the modal window returns to the List screen where the saved application is available in the My Saved view. Other views allow you to focus on tasks in different states.

*local_library*

To learn about views, see Workspaces core concepts > Views.

4. Select the saved application to open the Details screen where you can preview the information entered so far and any system-generated data. Note that none of the milestones on the progress stepper are marked as done yet as the application is saved, not yet submitted.


*local_library*

To learn about the progress stepper, see The application Details screen > Progress stepper.

5. Open the application form again, and submit it without uploading any of the required documents.
*local_library*

To learn about opening a saved application, see View Form: Re-open an application form.

Now that the application has been submitted, it is no longer available in the My Saved view. Instead, you can find it in the All applications view where all applications are visible to all Assisted Channel users.

6. Select the application to view it on the Details screen again.

Note that the current task is disabled. This is because the task is now at the Manual Review step, as shown in the Application Timeline, and the Assisted Channel user doesn't have permission to act on this task at this step.

*local_library*

To learn about the Application Timeline, see The application Details screen > Application timeline.

Looking at the progress stepper, it reveals that not only has the application been submitted, but it has completed an automated decision step and is currently under review.

7. logoutLogout of Journey Workspaces.

There's nothing else the Assisted Channel user can do at this stage, so it's time to begin processing the application.

## Initial processing

The application journey continues to the application processing stage. An initial review of the application checks that all required information and documents are available.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

   Several spaces are available under the Process space group:
   - **Review:** The main application processing space where all application review occurs.
   - **Information Requests:** Request-for-information tasks assigned to the applicant.
   - **Ad hoc Requests:** Ad-hoc tasks created by someone else and assigned to the logged-in user.
   - **Received Applications:** All applications, saved and submitted, open and closed, while they continue to exist in the system (subject to any data retention policy).

   We'll look at all these spaces throughout the demo.

   Usually, the Review space is selected by default. If another space is active, select the Review space.

   *local_library*

   To learn about space groups, see Workspaces core concepts > Roles and spaces.
   To learn about the Review space, see Reviewing applications.

2. When the Review space is selected, the All outstanding view is active by default. However, if the All outstanding view is not active , select it.

   Our new application is available in the item list.

3. Notice the Queue selector. Queues act as the source of application and task information. A user's access to queues, controlled by configured permissions, determines which applications and tasks they can see.

In the demo system, the queues correspond to user groups with different responsibilities: Error Group and Manual Group. Users with access to the Manual Group queue are responsible for handling manual review tasks. We can see our application when this queue (or the All queue) is selected.

4. Select the application to view it on the Details screen. Inspect the application's details.

   The goal of application processing is to decide whether to approve or reject the application. Scan the application to identify whether anything is preventing you from making that decision.

5. The Applicants tab includes features that facilitate application processing.
   - The Applicants list shows all the applicants involved in the application. Select an applicant from the list to see information about them in the Personal Info and Background Checks sections.
   - Background Checks use color to highlight what needs attention, as well as providing a way to view the information that contributed to each background check's outcome. *local_library*

     To learn about background checks, see [The application Details screen > Background Checks section].

     Some of the background checks are colored red indicating a negative result. We'll resolve this later.

6. The badge on the Document Checklisttab indicates the tab contains content that requires attention; in our case, required documents are missing and need to be uploaded. So, the application needs to be sent back to the applicant so they can upload the required documents.
7. Having determined a course of action, the application needs to be assigned to you before you can make any updates to it. You can do this by claiming the application which assigns the application's current task to you. (We'll discover another way to assign a task later.)

   Claim the application.

   *local_library*

   To learn how to claim an application, see [Claim: Assign an unassigned task to a yourself].

   Now that you've claimed the application, you can start updating it.

8. Workspaces functionality can be extended using custom actions which are available from the more_vertMore button's dropdown list on the Details screen.
   *local_library*

   To learn about custom actions, see Workspaces actions > Custom actions.

   The following custom actions are available in the default Workspaces configuration on which your Workspaces portal may be based. All the custom actions are covered in this demo.

   - Request Customer for Information
   - Create Ad hoc Request
   - Review Checklist
   - Re-run Background Checks
9. Send the application back to the applicant, requesting the required documents be uploaded as well as some additional information not captured in the application form.
   *local_library*

   To learn about requesting information from an applicant, see Example: Request information from applicant.

   Request the following information from the applicant:

   - **Required documents:** Payslip, Proof of address, Driver License, Proof of employment
   - **Additional information:** Details of previous employment, Marital status
   - **Notes:** Advise the applicant that the requested documents and information are required in order to process the application.

   In response to this action:

   - a JM account is created for the applicant using the applicant's email as the account login name and with the default password
   - the application is assigned to the applicant
   - an email is sent to the applicant informing them of their application's progress and including details for accessing their application in Journey Applicants

   On returning to the List screen, note that the application is no longer available in the All outstanding view. This is because it no longer satisfies the criteria imposed by that view. In fact, it is no longer available in the Review space; instead, it is now available in the Information Requests space.

10. Select the Information Requests space.
    *local_library*

    To learn about the Information Requests space, see Request information during application review.

    You can see the application here. Notice that the application is assigned to the applicant.

    In this space, Application Processing users can monitor applications assigned to applicants and communicate with them to handle any inquiries.

11. Select the application to view it on the Details Screen again.

    Note the task assigned to the applicant in the task switcher.

12. Finally, let's create a review checklist. This will allow us to keep track of which aspects of the application have been reviewed and which are outstanding. This is particularly useful when application processing occurs over several days or weeks, or when the application is assigned to different reviewers over the course of processing it.
    *local_library*

    For an example of how the Review Checklist works, see Example: Review checklist.

    Select the custom action Review Checklist. The Review Checklist modal window is displayed.

    - From the Personal Details dropdown, select Reviewed.
    - From the Attachments dropdown, select Awaiting customer update.
    - Leave the other Background Checks dropdown showing To do.
    - Save and close the modal window.

    A Review Checklist tab appears in the task pane. You can monitor the state of the Review Checklist items here.

13. logoutLogout of Journey Workspaces.

At this stage, the application is with the applicant for action, and bank staff can't do anything to advance the application towards success. Next, we'll see how the applicant and bank staff can communicate with one another to keep the application progressing along its journey.

## Applicant interaction

In this section, we discover how applicants can communicate with bank staff, and how an applicant can add more information to their application after the initial submission.

1. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

   personApplicant (Applicant's email)space_dashboardJourney Applicants

   Journey Applicants uses a mobile-first design, but can also be used on the desktop. We'll use it in desktop-mode throughout the remainder of this demo.

2. Let's investigate the applicant screen.

   The progress stepper shows that the applicant has been asked to provide more information, and a task has been assigned to them for this purpose.

   Looking at the task switcher, the only tasks shown are those assigned to the applicant.

   In the Information Requested card, we can see the message we sent to the applicant requesting more information.

3. To find out what information is required, the applicant resumes the application.

   From the actions group, click Resume.The Resume modal window is displayed with sections and fields for just the required information; in our case, upload four documents to the application and provide some additional information.

   Let's assume the applicant needs assistance to understand what was requested. Close the modal window, returning to the Details screen

4. Use the Notes and Comments features to seek assistance from the financial institution.

   Add a note to the application, asking whatever you need to know to be able to complete the assigned task.

   *local_library*

   To learn about Notes and Comments, see Task notes and comments.

5. logoutLogout of Journey Applicants.

   We need to return to Workspaces now to respond to the applicant's inquiry.

The applicant waits for the bank staff to respond to their question.

6. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

7. Select the Document Requests space.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesupload_file Document Requests

8. Select the application to view it on the Details screen. The applicant's question (note) is available in the Notes card.
9. Reply to the applicant's inquiry.

   Click Comments on the note. This creates a threaded conversation on the note between the applicant and bank staff. The applicant and bank staff can add more notes or comment on existing notes until the applicant is satisfied they have what they need to continue.

10. logoutLogout of Journey Workspaces.

Having responded to the applicant's inquiry, it's now back to the applicant to complete the task assigned to them.

11. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

    personApplicant (Applicant's email)space_dashboardJourney Applicants

12. The applicant views the bank staff's response (comment) to their question (note). Assuming the applicant is satisfied with the response, they can now move on to completing their assigned task.
13. Resume the application then fill in the required information, upload the required documents, and submit the application (again).

*local_library*

To learn how to resume an application, see [The application Details screen > Progress stepper]().
To learn about uploading documents, see [The application Details screen > Upload a document]().

14. In the Requested Information card, click the Complete icon to progress the application, assigning it back to the Application Processing user. Note that the task moves to the Completed Actions card which appears now if it wasn't already displayed.

    We can see that the task's status is Completed now, and the progress stepper shows that the application has returned to the Review step.

    The applicant has nothing else to do now until the application is approved.

15. logoutLogout of Journey Applicants.

The application has been assigned back to the Application Processing user who can continue to review it.

16. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

    personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesupload_file Document Requests

    The Document Requests space is selected because it was selected when we last logged out as the Application Processing user.

    The application is no longer available in the Document Requests spacebecause the applicant has completed our request for information. We need to look for the application in a different space.

17. Select the Review space.

    personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

We see that the application is available here. Notice that the application is not assigned to anyone.

Before we finish processing our application, let's take a look at some of the other spaces available in Workspaces.

18. logoutLogout of Journey Workspaces.

## Helpdesk

Workspaces includes a Helpdesk space designed to support teams who respond to customer inquiries.

*local_library*

To learn about the Helpdesk space, see Workspaces Helpdesk.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Helpdesk user.

   personHelpdesk (`helpdesk.staff@example.com`)space_dashboardJourney Workspaceshead-set_mic Helpdesk

   Generally, responding to a customer inquiry starts with finding an application.

2. Search for the application. You can search by various criteria such as application id or applicant name. However, you need to enter the full value of whichever field you're searching on as partial match is not supported. Items matching your exact search criteria are displayed in the item list.
   *local_library*

   To learn about finding a task or application, see Finding tasks and applications.

   The Helpdesk user can use the information in the item list to verify the identity of a caller. Once the caller is verified (as the applicant), the Helpdesk user can confidently share additional application details with the them.

3. Select the application to view it on the Details screen.

   While assisting the caller, the Helpdesk user can examine the application's details to check what has happened with the application so far. The Progress stepper shows where the application is currently in the application processing workflow, while the Task switcher and Application Timeline show all the steps the application has been through so far, some of which may have been repeated as the application is processed.

When the call ends, the Helpdesk user can return to the Helpdesk List screen to handle another inquiry, or logout.

4. logoutLogout of Journey Workspaces.

Next, we'll take a look at task management.

## Manage

Workspaces includes a Manage space designed to support task management.

*local_library*

To learn about the Manage space, see [Manage tasks and applications](#).

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Manager user.

   personManager (`manager@example.com`)space_dashboardJourney Workspacessupervised_user_circle Manage

   A manager can perform various task and application management activities such as:

   - preview all applications in different queues
   - monitor applications to ensure they're meeting SLAs
   - assign, reassign, or unassign tasks
2. Explore the List screen.
   - The Queue selector can be used to focus on application's at different steps in the application journey.
   - The SLA field helps us to focus on the application's that need to be processed first.

   Also, our application's Assigned to field is empty.

3. Assign the application to the Application Processing user.
   *local_library*

   To learn about task assignment, see [Assign a task to a user](#), [Reassign a task to another user](#), and [Unassign a task](#).

4. logoutLogout of Journey Workspaces.

Now that the application is assigned to the Application Processing user, we can continue to process it.

## Ad hoc requests

In this section, we continue processing the application, sharing the workload by using an ad hoc request to get someone else to verify the documents uploaded by the applicant.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

   The Review space is selected.

2. The All outstanding view is selected by default. The application appears in the item list, and it's assigned to the Application Processing user.

   Select the Assigned to me view. All applications assigned to the logged in user are available from this view. Other views allow you to focus on tasks in different states.

3. Select the application to view it on the Details screen. Review the application.
   - **Notes:** The Notes card shows all the communication that has happened between the applicant and processing staff.
   - **Documents:** The documents uploaded by the applicant are available in the Documents card. You can either view a document in a modal window (linkView detail) or download it (vertical_align_bottomDownload), for example, to verify applicant details. *local_library*

     To learn about viewing and downloading documents, see Documents.

   - **Documents Checklist:** The Documents Checklist tab shows that all required documents are now available. However, none of the documents have been verified which is why the attention badge remains on this tab.
   - **Additional Information:** The Additional Information tab contains questions and answers for the additional information requested of the applicant.
4. The documents need to be verified. Create an ad hoc task for someone else to verify them. *local_library*

   For an example of how to create an ad hoc task, see Example: Create an ad hoc task.

5. logoutLogout of Journey Workspaces.

For this demo, the Document Verification ad hoc task is assigned to the super user (`super-.user@example.com`).

6. loginLogin: Clear your browser cache, and login to Journey Workspaces as the super user. Select the Ad hoc Requests space.

   personApplication Processing (`super.user@example.com`)space_dashboardJourney Work-spacesadd_task Ad hoc Requests

   Only tasks that are assigned to the logged in user appear in the item list.

7. Locate the ad hoc task in the item list.

   Notice the SLA indicator displays the ● (SLA Warning) icon.

8. Select the task to display its details. Explore the Details screen.
   - In the application key info card, notice the Task Type is Document Verification.
   - Notice the attention badge on the Documents Checklist tab.
   - Select the Documents Checklist tab. Notice the Verification column.
9. Verify the documents.
   *local_library*

   To learn about completing an ad hoc task for document verification, see Example: Com-plete an ad hoc task.

   After verifying the documents, the List screen is displayed and the task no longer appears in the item list.

10. logoutLogout of Journey Workspaces.

With the application documents verified, the reviewer can complete application processing.

## Finish application processing

In this section, we finish processing the application by making a decision about it's outcome. Along the way, we update the background checks and re-visit the Review Checklist.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Work-spacesrate_review Review

   The Review space is selected.

2. Locate the application in the item list. Notice that it's not assigned to anyone. This is because the last task, the document verification task, has been completed.

   Claim the application again, from the List screen this time, then select it to display its details.

3. Review the application again.
   - **Queue:** Notice that the Queue is Manual Review.
   - **Documents Checklist:** Select the Documents Checklist tab. Notice that the attention badge no longer appears on this tab, and all required documents are available and verified.
   - **Background Checks:** Select the Applicants tab. Failed background checks still appear on the Background Checks section. These checks need to be run again to see if they still fail.
4. Run the background checks again, to see if the failing checks pass now.
   *local_library*

   For an example of how to re-run background checks, see Example: Re-run background checks.

   All the background checks pass now, except for one that we'll ignore.

5. Update the Review Checklist.
   *local_library*

   For an example of how to use the Review Checklist, see Example: Review checklist.

   On the Review Checklist modal window

   - From the Attachments dropdown list, select Reviewed.
   - From the Background Checks dropdown list, select Reviewed.
   - Save and close the modal window.

   Having reviewed the application's details, we're now ready to make a decision about the application's outcome. We're going to approve it.

6. Approve the application.
   *local_library*

   For an example of how to approve an application, see Reviewing applications > Approve an Application.

The Details screen closes, returning to the List screen.

The application is transferred back to the applicant, and an email is sent to them advising how to complete the final step: funding the application.

7. The application no longer appears in the Assigned to me view but it is still available under the Completed tasks view if it needs to be viewed again.

   Alternatively, you can find the application in the Received Applications space. Here, you can see all of the tasks associated with an application.

8. logoutLogout of Journey Workspaces.

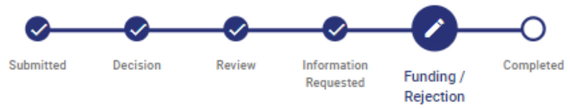
## Fund the application

Finally, the application has been approved and the applicant needs to fund their new account.

1. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

   personApplicant (Applicant's email)space_dashboardJourney Applicants

   A funding task is assigned to the applicant.


2. Resume the application, complete the funding stage on the form, and submit the application one last time. The application is completed.


   All of the tasks assigned to the applicant (in the task switcher) now appear as completed.

3. logoutLogout of Journey Applicants.

With the application funded, this application journey ends here.

You can learn more about Workspaces features in the Workspaces user guide, and information for solution builders is available in the Workspaces technical guide.

# How to use the Journey Workspaces 23.04 demo

Every Journey Workspaces portal comes with a pre-defined configuration that makes all Workspaces features available via controlled user access to a set of role-specific spaces. While this default configuration can be used as the basis for your own Journey Workspaces portal, you need additional elements like forms, roles and users in order to access the spaces and features in a meaningful way. The Journey Workspaces demo provides these additional elements in a sandboxed organization, giving you everything you need to experience the full application journey from start to finish in a safe environment that won't interfere with development and production systems.

This topic describes the application journey demonstrated in the video Workspaces: An Application Journey. This video follows an application as it takes a journey via Workspaces from creation to completion. This journey passes through several stages, each of which focuses on an activity that involves specific Workspaces users, spaces, and features.

- Start an application in the Assisted Channel space.
- Initial application processing in the Review and Document Requests spaces.
- Interaction between the applicant and processing staff about uploading required documents.
- Provide customer support in the Helpdesk space.
- Perform application management activities such as task assignment in the Manage space.
- Complete application processing: create a review checklist, re-run background checks, and approve the application.
- Applicant completes funding of the application.

## Getting started

The Workspaces demo can be set up in your Journey Manager environment so that you can investigate all that Workspaces has to offer. Contact your TJM representative to request a Workspaces demo in your Journey Manager environment.

### Demo users

At the core of the Workspaces demo is a set of user ids that provide access to various spaces. Each space in turn provides access to features and a subset of application data that are relevant to the role performed by the user. The demo user ids are as follows:

| Role | User ID | Available spaces |
|---|---|---|

| | | |
|---|---|---|
| Assisted Channel* | `assist.staff@example.com` | Assisted Channel |
| Helpdesk | `helpdesk.staff@example.com` | Helpdesk |
| Application Processing | `process.staff@example.com` | Review, Document Requests |
| Manager | `manager@example.com` | Manage |

* In some regions, this role corresponds to a relationship manager.

In addition to these space-restricted user ids, there is a super-user user id (`super.user@example.com`) that has access to all of the spaces mentioned above.

> TIP
>
> The default password for all users is: `!n!t!@lP@$$w0rd`

As shown above, most of the users created for this demonstration are configured with access for just one space. This allows us to focus on role-specific features and workflow as we move through the demonstration. A consequence of this is that the menu Spaces navigation icon is hidden most of the time, only being displayed when multiple spaces are available.

### Accessing a Workspaces portal

To access a Workspaces portal, you need to find the portal's form URL in Journey Manager and browse to it.

To find a portal's form URL, follow these steps.

1. Login to Journey Manager and select Forms > Forms.
2. Locate Journey Workspaces in the list of forms.
3. On the same row, click Form Test Render

   Alternatively, you can copy the URL from the Form Test Render icon. For example, in Google Chrome, right-click Form Test Render and select Copy link address from the menu.

The same steps can be used to find the Journey Applicants portal's form URL by locating Journey Applicants at step 2 instead.

Once you have the portal's form URL, paste it into a new browser tab or window to access the portal.

### Conventions

Conventions used in this topic are designed to help you understand where you are in the demo.

- Throughout the demo, you will need to login as different users. To help you identify when you need to switch to a different user, look for the loginLogin and logoutLogout icons.

  NOTE

  It's recommended that you clear your browser's application cache when switching between the demo users. This is because Workspaces stores data that is incompatible between different users in the application cache, and this can cause problems in a Workspaces demo system where you are logging in with different user ids in the same browser.
  This is not an issue in a production system where each user logs in with their own user id only.

- Each time you need to login as a different user or switch to a different space, we'll show you a graphic like this:

  personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

  The items displayed are:
  - person A role and the corresponding user id to login with.
  - space_dashboard An app in the Journey Workspaces suite.
  - rate_review A space in Journey Workspaces (omitted for Journey Applicants).

  This provides context for which portal and space you're in and who you're logged in as. You can match these graphical elements to similar ones in the video.

## Start an application

The application journey begins in the Assisted Channel space. Follow these steps.

*local_library*

To learn about the Assisted Channel space, see Workspaces Assisted Channel.

1. loginLogin to Journey Workspaces as the Assisted Channel user.

   personAssisted Channel (`assist.staff@example.com`)space_dashboardJourney Workspacesaccessibility_new Assisted Channel

The Assisted Channel space is selected because this is the only space available for this user.

*local_library*

To learn about spaces, see Workspaces core concepts > Roles and spaces.

2. Start a new application.
*local_library*

To learn about starting an application, see New Form: Start a new application.

INFO

The demo application form is US-centric; for example, it uses SSN and US-format phone numbers. If you're interested in having a demo application form for another locale, contact your TJM representative to register your interest.

3. Fill out all form pages until you reach the Supporting documents (Optional) page, then save the application and close the modal window.
*local_library*

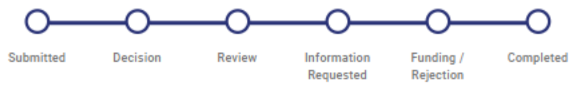
To learn about modal windows, see Workspaces UI tour > Modal windows.

Closing the modal window returns to the List screen where the saved application is available in the My Saved view. Other views allow you to focus on tasks in different states.

*local_library*

To learn about views, see Workspaces core concepts > Views.

4. Select the saved application to open the Details screen where you can preview the information entered so far and any system-generated data. Note that none of the milestones on the progress stepper are marked as done yet as the application is saved, not yet submitted.




*local_library*

To learn about the progress stepper, see The application Details screen > Progress stepper.

5. Open the application form again, and submit it without uploading any of the required documents.

   *local_library*

   To learn about opening a saved application, see View Form: Re-open an application form.

   Now that the application has been submitted, it is no longer available in the My Saved view. Instead, you can find it in the All applications view where all applications are visible to all Assisted Channel users.

6. Select the application to view it on the Details screen again.

   Note that the current task is disabled. This is because the task is now at the Manual Review step, as shown in the Application Timeline, and the Assisted Channel user doesn't have permission to act on this task at this step.

   *local_library*

   To learn about the Application Timeline, see The application Details screen > Application timeline.

   Looking at the progress stepper, it reveals that not only has the application been submitted, but it has completed an automated decision step and is currently under review.

7. logoutLogout of Journey Workspaces.

There's nothing else the Assisted Channel user can do at this stage, so it's time to begin processing the application.

## Initial processing

The application journey continues to the application processing stage. An initial review of the application checks that all required information and documents are available.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

Two spaces are available under the Process space group: Review and Document Requests. The Review space is selected by default.

*local_library*

To learn about space groups, see Workspaces core concepts > Roles and spaces.
To learn about the Review space, see Reviewing applications.

Our new application is available in the All outstanding view.

2. Select the application to view it on the Details screen.

   In order to start processing the application, it must be assigned to you. You can do this by claiming the application which assigns the application's current task to you. (We'll discover another way to assign a task later.)

3. Claim the application.
   *local_library*

   To learn how to claim an application, see Claim: Assign an unassigned task to a yourself.

   Now that you've claimed the application, you can start processing it.

4. The goal of application processing is to decide whether the application can be approved. Scan the application to identify whether anything is preventing you from making that decision.

   The Applicants tab includes features that facilitate application processing. The Background Checks use color to highlight what needs attention, as well as providing a way to view the information that contributed to each background check's outcome.

   *local_library*

   To learn about background checks, see The application Details screen > Background Checks section.

   The badge on the Document Checklist tab indicates the tab contains content that requires attention; in this case, identifying that required documents are missing and need to be uploaded. So, the application needs to be sent back to the applicant so they can upload the required documents.

5. Send the application back to the applicant, requesting the required documents be uploaded.

*local_library*

To learn about requesting information from an applicant, see Example: Request information from applicant.

In response to this action:

- a JM account is created for the applicant using the applicant's email as the account login name and with the default password
- the application is assigned to the applicant
- an email is sent to the applicant informing them of their application's progress and including details for accessing their application in Journey Applicants

On returning to the List screen, note that the application is no longer available in the All outstanding view. This is because it no longer satisfies the criteria imposed by that view. In fact, it is no longer available in the Review space; instead, it is now available in the Document Requests space.

6. Select the Document Requests space.
   *local_library*

   To learn about the Document Requests space, see Request information during application review.

   You can see the application here. In this space, Application Processing users can monitor applications assigned to applicants and communicate with them to handle any inquiries.

7. logoutLogout of Journey Workspaces.

At this stage, the application is with the applicant for action, and bank staff can't do anything to advance the application towards success. Next, we'll see how the applicant and bank staff can communicate with one another to keep the application progressing along its journey.

## Applicant interaction

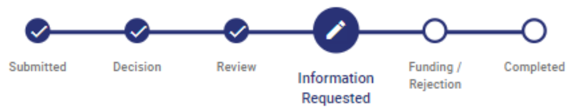
In this section, we discover how applicants can communicate with bank staff, and how an applicant can add more information to their application after the initial submission.

1. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

   personApplicant (Applicant's email)space_dashboardJourney Applicants

Journey Applicants uses a mobile-first design, but can also be used on the desktop. We'll use it in desktop-mode throughout the remainder of this demo.

The progress stepper shows that the applicant has been asked to provide more information, and a task has been assigned to them for this purpose.




A message in the Information Requested section indicates to the applicant what they need to do; in this case, upload four documents to the application. In the event that the applicant needs assistance in completing the assigned task, they can use the Notes and Comments features to communicate with the bank.

2. Add a note to the application, asking whatever you need to know to be able to complete the assigned task.
   *local_library*

   To learn about Notes and Comments, see [Task notes and comments](#).

   The applicant now waits for the bank staff to respond to their question.

3. logoutLogout of Journey Applicants.

   We need to return to Workspaces now to respond to the applicant's inquiry.

4. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

5. Select the Document Requests space.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesupload_file Document Requests

6. Select the application to view it on the Details screen. The applicant's question (note) is available in the Notes card.

7. Click Comments on the note and reply to the applicant's inquiry.

   This creates a threaded conversation on the note between the applicant and bank staff. The applicant and bank staff can add more notes or comment on existing notes until the applicant is satisfied they have what they need to continue.

   Having responded to the applicant's inquiry, it's now back to the applicant to complete the task assigned to them.

8. logoutLogout of Journey Workspaces.

   We now return to Journey Applicants so that the applicant can upload the missing documents.

9. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

   personApplicant (Applicant's email)space_dashboardJourney Applicants

   The applicant can view the bank staff's response (comment) to their question (note). Assuming the applicant is satisfied with the response, they can now move on to completing their assigned task.

10. Resume the application then upload the required documents and submit the application (again).
    *local_library*

    To learn how to resume an application, see [The application Details screen > Progress stepper](#).
    To learn about uploading documents, see [The application Details screen > Upload a document](#).

11. In the Information Requested card, click Complete to progress the application, assigning it back to the Application Processing user.

    We can see that the task's status is Completed now, and the progress stepper shows that the application has returned to the Review step.


    The applicant has nothing else to do now until the application is approved.

12. logoutLogout of Journey Applicants.

    The application has been assigned back to the Application Processing user who can continue to review it.

13. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user.

    personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesupload_file Document Requests

    The Document Requests space is selected by default because it was selected when we last logged out as the Application Processing user. The application is no longer available here because the applicant has completed our request for information. We need to look for the application in a different space.

14. Select the Review space.

    personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

    We see that the application is available here. Before we finish processing our application, let's take a look at some of the other spaces available in Workspaces.

15. logoutLogout of Journey Workspaces.

## Helpdesk

Workspaces includes a Helpdesk space designed to support teams who respond to customer inquiries.

*local_library*

To learn about the Helpdesk space, see [Workspaces Helpdesk](#).

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Helpdesk user.

    personHelpdesk (`helpdesk.staff@example.com`)space_dashboardJourney Workspacesheadset_mic Helpdesk

    Generally, responding to a customer inquiry starts with finding an application.

2. Search for the application. You can search by various criteria such as application id or applicant name. However, you need to enter the full value of whichever field you're

searching on as partial match is not supported. Items matching your exact search criteria are displayed in the item list.
*local_library*

To learn about finding a task or application, see Finding tasks and applications.

The Helpdesk user can use the information in the item list to verify the identity of a caller. Once the caller is verified (as the applicant), the Helpdesk user can confidently share additional application details with the them.

3. Select the application to view it on the Details screen.

   While assisting the caller, the Helpdesk user can examine the application's details to check what has happened with the application so far. The Progress stepper shows where the application is currently in the application processing workflow, while the Task switcher and Application Timeline show all the steps the application has been through so far, some of which may have been repeated as the application is processed.

   When the call ends, the Helpdesk user can return to the Helpdesk List screen to handle another inquiry, or logout.

4. logoutLogout of Journey Workspaces.

Next, we'll take a look at task management.

## Manage

Workspaces includes a Manage space designed to support task management.

*local_library*

To learn about the Manage space, see Manage tasks and applications.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Manager user.

   personManager (`manager@example.com`)space_dashboardJourney Workspacessupervised_user_circle Manage

   A manager can perform various task and application management activities such as:

   - preview all applications in different queues
   - monitor applications to ensure they're meeting SLAs
   - assign, reassign, or unassign tasks

2. Assign the application to the Application Processing user.
   *local_library*

   To learn about task assignment, see Assign a task to a user, Reassign a task to another user, and Unassign a task.

3. logoutLogout of Journey Workspaces.

Now that the application is assigned to the Application Processing user, we can finish processing it.

## Complete processing

In this section, we finish processing the application by making a decision about it's outcome.

1. loginLogin: Clear your browser cache, and login to Journey Workspaces as the Application Processing user. The Review space is selected.

   personApplication Processing (`process.staff@example.com`)space_dashboardJourney Workspacesrate_review Review

   The All outstanding view is selected by default. The application appears in the item list, and it's assigned to the Application Processing user.

2. Select the Assigned to me view.

   All applications assigned to the logged in user are available from this view. Other views allow you to focus on tasks in different states.

3. Select the application to view it on the Details screen.

   Review the application.

   - The Document Checklist tab shows that all required documents are now available. To view any of these documents (for example, to verify applicant details), you can download it from the Documents card.
   - The Notes card shows all the communication that has happened between the applicant and processing staff.
   - Failed background checks appear on the Applicants tab. These checks need to be run again to see if they still fail.

4. Workspaces functionality can be extended using custom actions.
   *local_library*

   To learn about custom actions, see: Workspaces actions > Custom actions.

The following custom actions, targeted at application processing, are covered by the Workspaces demo.

- **more_vert**More **> Review Checklist:** Create and maintain a custom checklist for activities related to application processing. This is useful if an application has a lengthy review process, or simply as a reminder of which application processing activities have been done and which are outstanding.
  *local_library*

  For an example of how the Review Checklist works, see Example: Review Checklist.
- **more_vert**More **> Re-run Background Checks:** Run the background checks again, usually done to see if failing checks pass now.
  *local_library*

  For an example of how to re-run background checks, see Example: Re-run Background Checks.

Having reviewed the application's details, we're now ready to make a decision about the application's outcome. We're going to approve it.

5. Approve the application.
   *local_library*

   For an example of how to approve an application, see Reviewing applications > Approve an Application.

   The Details screen closes, returning to the List screen. The application no longer appears in the Assigned to me view but it is still available under the Completed tasks view if it needs to be viewed again.

   The application is transferred back to the applicant, and an email is sent to them advising how to complete the final step: funding the application.
6. logoutLogout of Journey Workspaces.

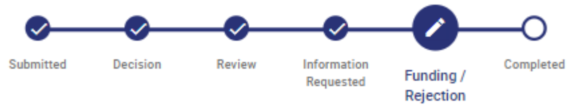
## Fund the application

Finally, the application has been approved and the applicant needs to fund their new account.

1. loginLogin: Clear your browser cache, and login to Journey Applicants using the applicant's email from the application user.

   personApplicant (Applicant's email)space_dashboardJourney Applicants

A funding task is assigned to the applicant.




2. Resume the application, complete the funding stage on the form, and submit the application one last time. The application is completed.


All of the tasks assigned to the applicant (in the task switcher) now appear as completed.

3. logoutLogout of Journey Applicants.

With the application funded, this application journey ends here.

You can learn more about Workspaces features in the Workspaces user guide, and information for solution builders is available in the Workspaces technical guide.

# Journey Workspaces demo examples

The Journey Workspaces demo video Workspaces: An Application Journey follows an application journey through several stages, demonstrating many standard features as well as some custom processes. While the standard features are described in the Workspaces user guide, this topic presents step-by-step instructions for some custom processes that are described in the demo video and which may be configured in your Workspaces portal.

Examples for the following processes are provided below.

- Request information from applicant
- Review checklist
- Re-run background checks

## Example: Request information from applicant

An application can be configured to allow it to be submitted without entering all of the required information. Allowing an incomplete application to be submitted generally reduces the friction experienced by the applicant while filling out the application which improves the chances of the application being submitted successfully. However, this improved customer experience is balanced by the need for application processing staff to review applications for missing information and request that information from applicants.

This example shows how to send an application back to an applicant, requesting them to provide more information required for application processing. In this example, we locate an application on the List screen and view its details where we identify that some required documents are missing. Then, we create a request for more information, sending the application back to the applicant so that they can provide the information we need.

The instructions below follow the steps shown in the Workspaces demo video when demonstrating how to request information from an applicant during initial processing.

- 23.10
- 23.04

1. Login to Workspaces and select the Review space.
2. Locate an application of interest in the item list, and select it to view it on the Details screen.

3. Review the application details, noting that some background checks have failed. Further, there is an action badge on the Documents Checklist tab indicating attention is required here.
4. Select the Documents Checklist tab.

   Note that several required documents are not available, so we need to ask the applicant to upload them. Before we can do that, we need to take ownership of this task.

5. Click library_addClaim to assign the task to yourself.

   You can skip this step if the task is already assigned to you.

6. Click more_vertMore then from the dropdown list select Request Customer for Information. The Request Customer for Information modal window is displayed.
7. From the Choose the Applicant dropdown, select an applicant. Additional fields appear, from which you can select the information you need from the applicant.
8. From the Documents Request section, select the options for the required documents; for this example, select the first four options.
9. From the Additional Information section, select the options corresponding to the required information; for this example, select the following:
   - Request for time spent with current employer
   - Request for marital status
10. In the Notes box, enter instructions to assist the applicant in completing this request for information.
11. Click Submit.

    The modal window closes and Workspaces returns to the List screen. A message is displayed at the bottom of the screen indicating whether this action was successful.

On returning to the List screen, note that the application is no longer available in the All outstanding view. This is because it no longer satisfies the criteria imposed by that view. In fact, it is no longer available in the Review space; instead, it is now available in the Information Requests space.

1. Login to Workspaces and select the Review space.
2. Locate an application of interest in the item list, and select it to view it on the Details screen.
3. Review the application details, noting that some background checks have failed. Further, there is an action badge on the Documents Checklist tab indicating attention is required here.

4. Select the Documents Checklist tab.

   Note that several required documents are not available, so we need to ask the applicant to upload them. Before we can do that, we need to take ownership of this task.

5. Click library_addClaim to assign the task to yourself.

   You can skip this step if the task is already assigned to you.

6. Click call_splitDecision to display the Decision modal window.
7. Click the Choose a Decision box, select Request for Information from the list, then enter information in the Notes box describing what information you need from the applicant.

   For this example, enter the list of missing documents in the Notes box along with the instruction to upload them.

8. Click Submit.

   The modal window closes and Workspaces returns to the List screen. A message is displayed at the bottom of the screen indicating whether this action was successful.

On returning to the List screen, note that the application is no longer available in the All outstanding view. This is because it no longer satisfies the criteria imposed by that view. In fact, it is no longer available in the Review space; instead, it is now available in the Document Requests space.

After the request for information is submitted, the following occur:

- a JM account is created for the applicant using the applicant's email as the account login name and with the default password
- the application is assigned to the applicant

- an email is sent to the applicant informing them of their application's progress and including details for accessing their application in Journey Applicants

## Example: Review checklist

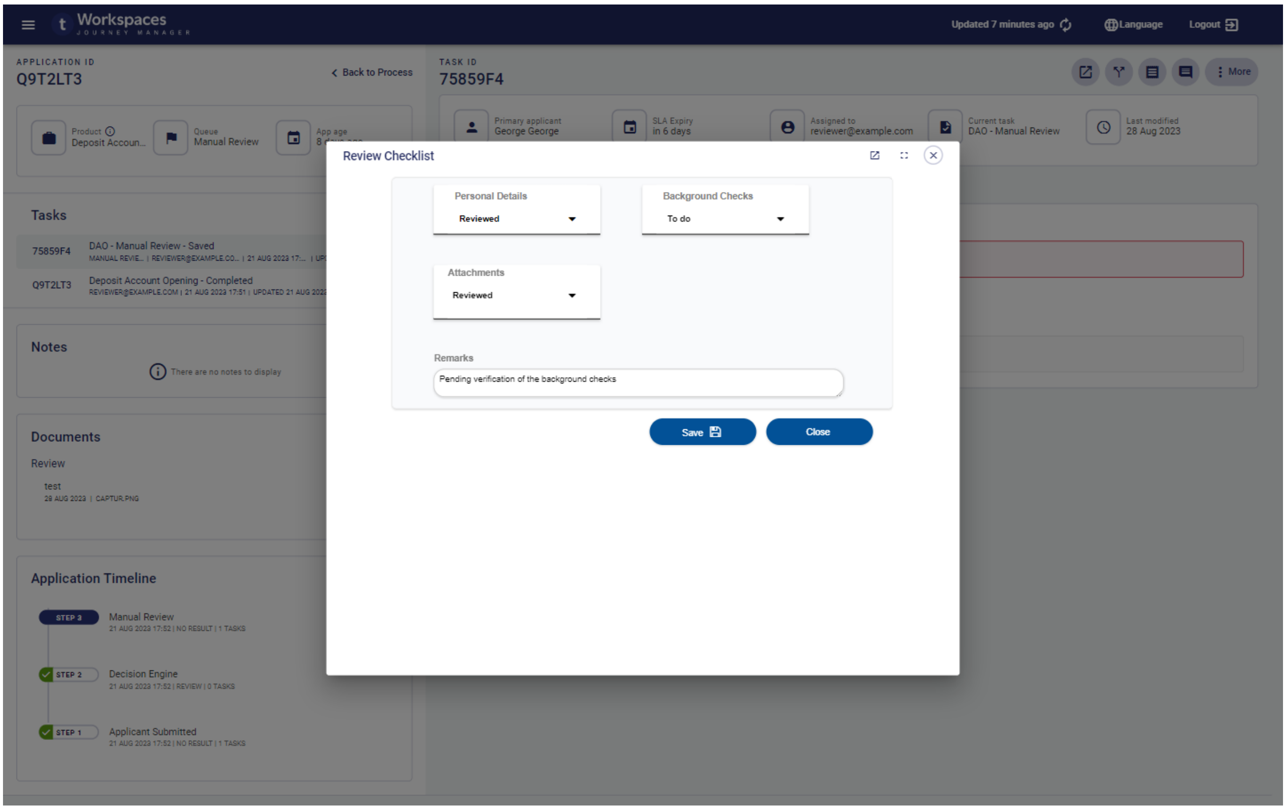
Some applications are complicated, requiring a lengthy review process, or simply configured with a lot of steps in which case it's handy to have a to-do list as a reminder of which application processing activities have been done and which are outstanding. In the Workspaces demo video, a custom review checklist feature is demonstrated that let's you create and maintain a custom checklist for activities related to application processing.

This example shows how to use the custom review checklist feature that's configured in the default Workspaces template on which your Workspaces portal may be based. In this example, we locate an application on the List screen and view its details where custom actions like the review checklist are available. We'll see how to create a review checklist and how to use it to keep track of application processing activities.

The instructions below follow the steps shown in the Workspaces demo video when demonstrating the review checklist while completing application processing.

1. Login to Workspaces and select the Review space.
2. Locate an application of interest in the item list, and select it to view it on the Details screen.
3. Click more_vertMore, and select Review Checklist from the list of custom actions.

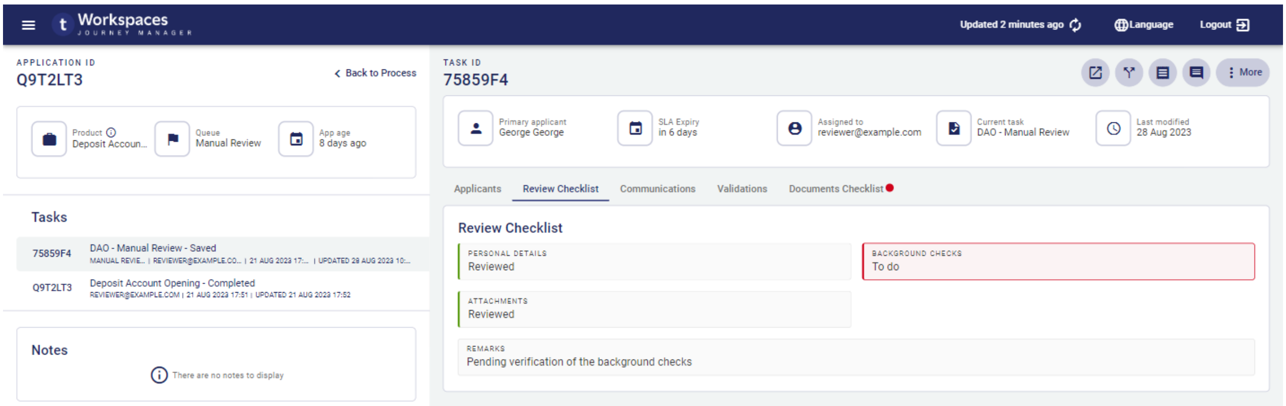
   The Review Checklist modal window is displayed with fields for the status of activities relating to personal details, background checks, and attachments, and a text field for any remarks.



4. Select appropriate values for the Personal Details, Background Checks, and Attachments fields, and enter other relevant information in the Remarks box.
5. Click saveSave then close the modal window. Workspaces returns to the Details screen.

   When you save the review checklist, a new Review Checklist tab is created on the Task pane.

6. Select the Review Checklist tab



The information entered on the Review Checklist modal window is available here, using the same color-codes used elsewhere to indicate positive and negative states. In this example, Personal Details and Attachments are shown in green indicating review is complete while Background Checks is shown in red indicating this is outstanding and there's more to do for these.

The Review Checklist tab is persistent, meaning it will continue to appear here even if you logout of the current Workspaces session and come back later.

## Example: Re-run background checks

Application processing often relies upon the outcomes of various background checks. Some of these checks are used to verify information entered by the applicant while others count towards or against the assessment of an applicant as being a suitable borrower or debtor. Regardless of the purpose of these checks, their outcomes can change throughout the course of application processing, in particular after information is added to or changed in a submitted application. This necessitates the ability to run the background checks again to determine whether the outcomes of any checks have changed.

The Workspaces demo video demonstrates a custom action that let's you re-run background checks while processing an application. This custom action is configured in the default Workspaces template on which your Workspaces portal may be based, and this example shows how to use it. In this example, we locate an application on the List screen and view its details where custom actions are available. We'll see how to re-run the background checks and then ascertain if any outcomes have changed.

The instructions below follow the steps shown in the Workspaces demo video when demonstrating how to re-run background checks while [completing application processing](#).

1. Login to Workspaces and select the Review space.
2. Locate an application of interest in the item list, and select it to view it on the Details screen.
3. Click more_vertMore, and select Re-run Background Checks from the list of custom actions.

   The background checks run and a message is displayed at the bottom of the screen indicating whether this action was successful. If it was successful, the Background Checks section of the Applicants tab is refreshed showing the updated background check outcomes.

1. Negative background checks
2. Re-run background checks
3. Success message
4. Positive background checks

You can re-run background checks as often as you need to throughout the application journey to ensure you're always looking at up-to-date background check outcomes.

## Example: Create an ad hoc task

Sometimes, processing of an application might be shared by several reviewers. For example, while one reviewer may have primary responsibility for processing an application, they may need to offload certain activities to other reviewers, say, to meet a looming SLA or because someone else has specialist knowledge. Workspaces supports sharing of work in this way via ad hoc tasks.

The Workspaces demo video shows how to create an ad hoc task for the purpose of getting someone else to verify the documents uploaded to an application. The custom Create Ad hoc Request action is configured in the default Workspaces template on which your Workspaces portal may be based, and this example shows how to use it. In this example, we locate an application on the List screen and view its details where the custom actions are available. We'll see how to create an ad hoc task and assign it to another user.

Info

The demo also shows how the other user verifies the documents. To learn about that process, see Example: Complete an ad hoc task.

The instructions below follow the steps in the demo video, showing how to create an ad hoc task while completing application processing.

1. Login to Workspaces and select the Review space.
2. Locate an application of interest in the item list, and select it to view it on the Details screen.
3. Click more_vertMore, and select Create Ad hoc Request from the list of custom actions. The Create Ad hoc Request modal window is displayed.
4. In the Task section:
   - From the Type dropdown list, select Document Verification.
   - From the Assignee dropdown list, select another user (such as `super.user@example.com`).
   - Select an optional Due Date, say, tomorrow.
5. In the Documents Checklist section, select all documents.
6. In the Notes box, enter instructions for the verifier.
7. Click Submit. The modal window closes, returning to the List screen.

The verifier can find the new ad hoc task assigned to them in the Workspaces Ad hoc Requests space.

## Example: Complete an ad hoc task

Sometimes, processing of an application might be shared by several reviewers. For example, while one reviewer may have primary responsibility for processing an application, they may need to offload certain activities to other reviewers, say, to meet a looming SLA or because someone else has specialist knowledge. Workspaces supports sharing of work in this way via ad hoc tasks.

The Workspaces demo video shows how to complete an ad hoc task for document verification. In the Ad hoc Requests space of the default Workspaces template (on which your Workspaces portal may be based), the Decision standard action is configured to handle ad hoc tasks, and this example shows how to use it. In this example, we locate an application on the List screen and view its details where we'll use the Decision action to complete the ad hoc task.

1. Login to Workspaces and select the Ad hoc Requests space.
2. Locate the application of interest in the item list, and select it to view it on the Details screen.
3. From the actions group, click call_splitDecision. The Decision modal window is displayed.
4. In the Documents for Review section, scroll through the list of documents. For each document:
   - Review the document's content.
   - Select the Mark as verified checkbox.

5. Optional: In the Notes box, enter a comment for the reviewer who raised the ad hoc task.
6. Click Submit. The modal window closes, returning to the List screen.

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# Journey Workspaces FAQ

NOTE

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

## 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, or 21.05 environment?
- Can I deploy the Workspaces 19.11 portal in a TJM 21.11 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
- What is the default timeout for Workspaces, and can it be changed?

## 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

NOTE

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

## 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

NOTE

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## 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, or 21.05 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 21.11 or later environment?

No. TJM 21.11 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 21.11.

# Journey Workspaces FAQ - Fresh Installation

NOTE

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## 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.

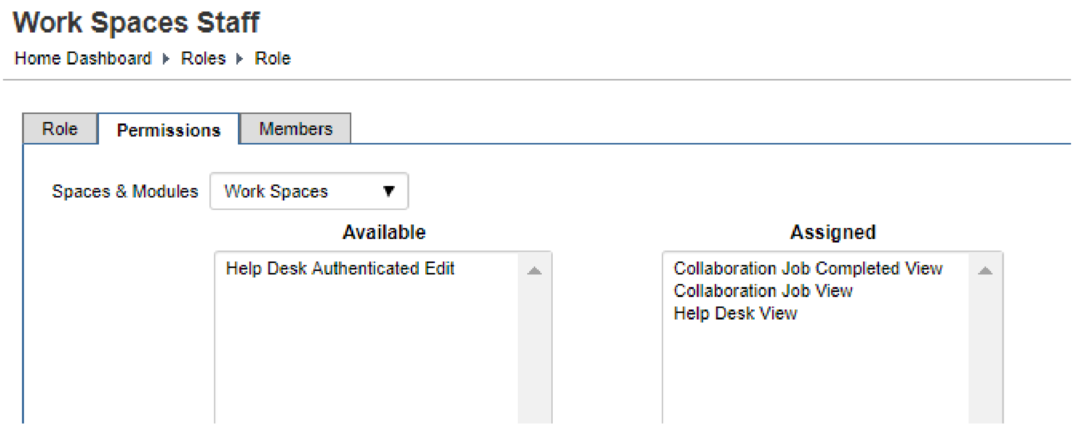
NOTE

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.

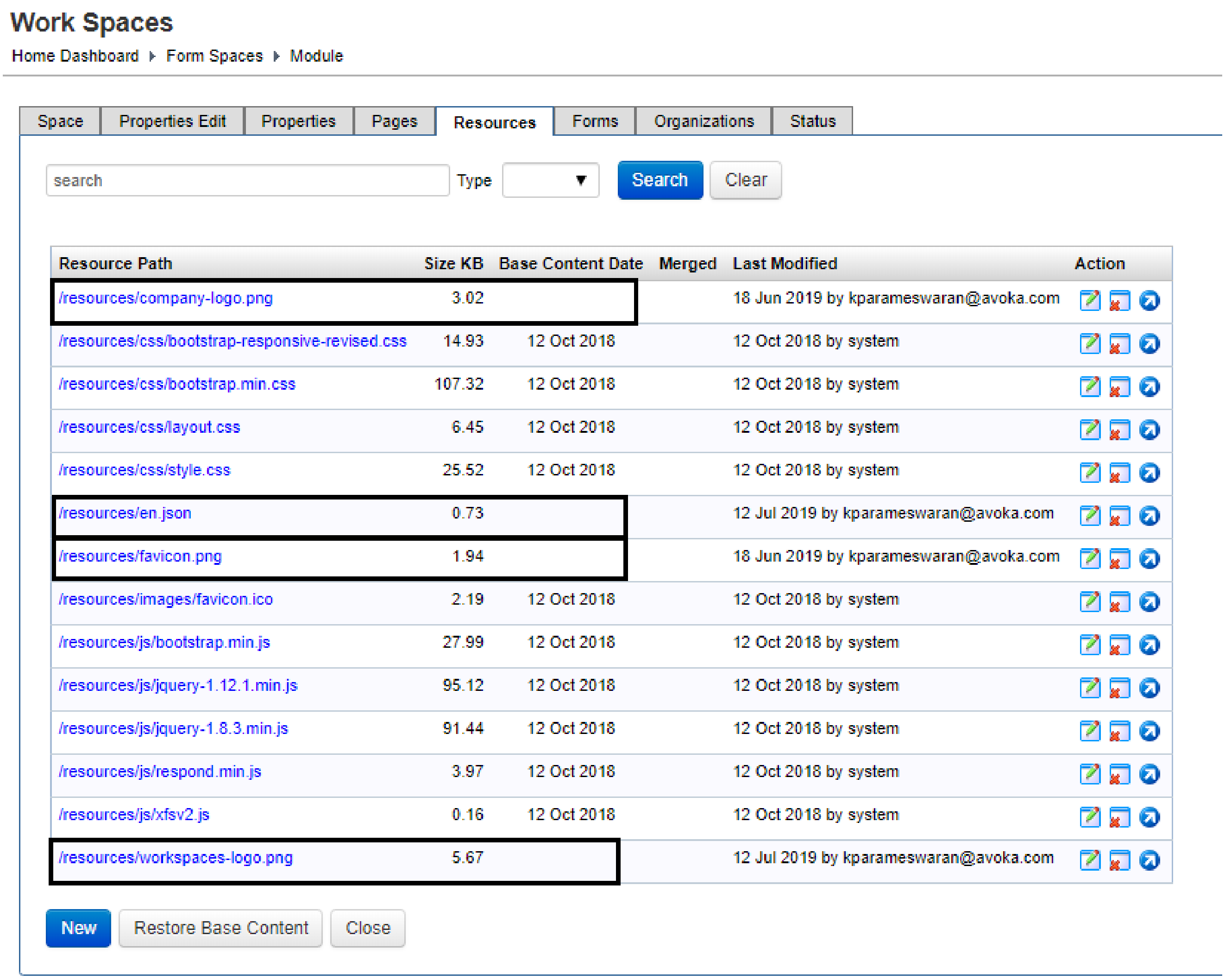
## What resources are required by Workspaces after a fresh installation?

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



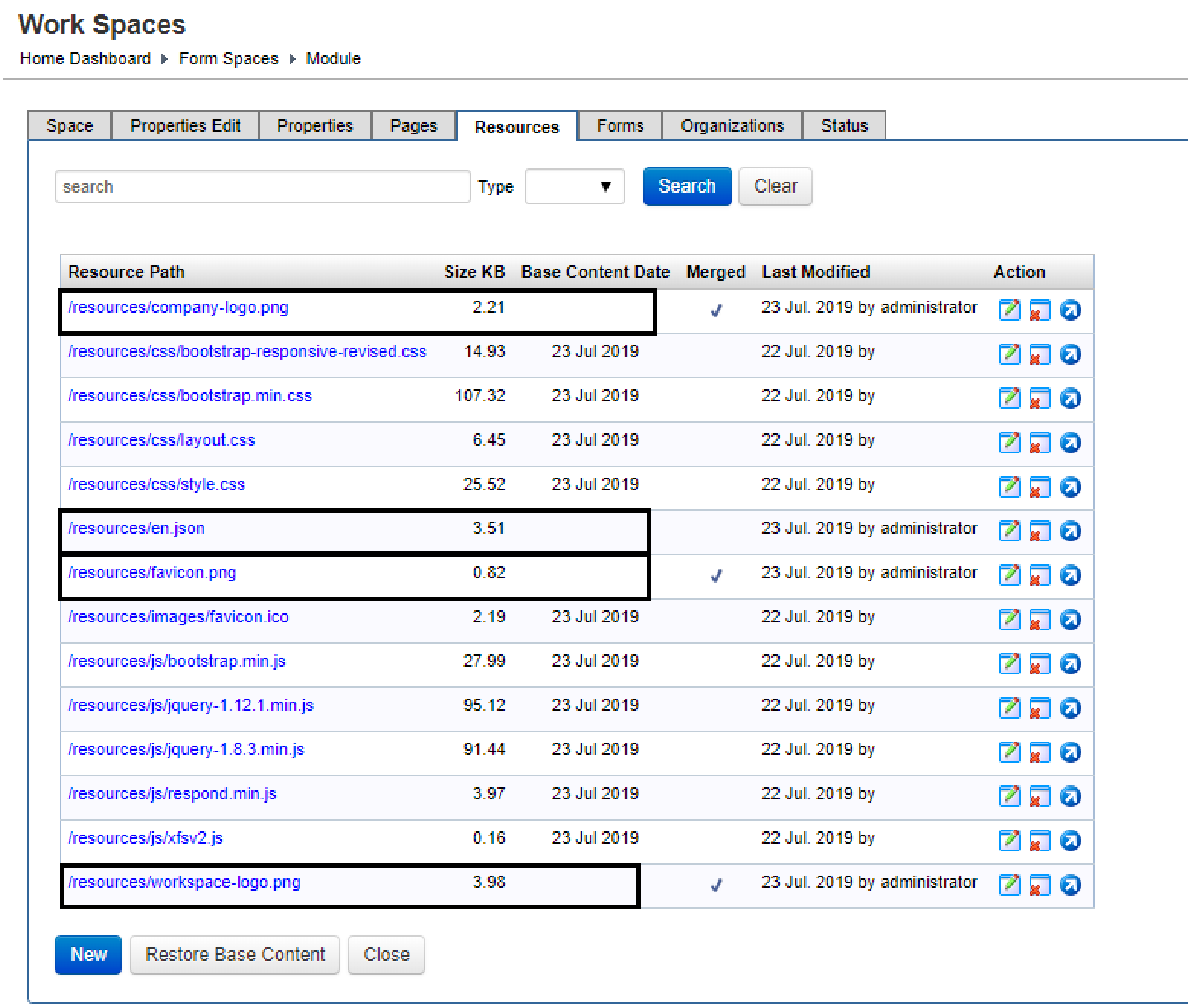

| Resource Path | Size KB | Base Content Date | Merged | Last Modified | Action |
|---|---|---|---|---|---|
| /resources/company-logo.png | 3.02 | | | 18 Jun 2019 by kparameswaran@avoka.com | |
| /resources/css/bootstrap-responsive-revised.css | 14.93 | 12 Oct 2018 | | 12 Oct 2018 by system | |
| /resources/css/bootstrap.min.css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




NOTE

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

# Journey Workspaces FAQ - Configuration

NOTE

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## 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 |

| Supported releases | Unsupported releases |
|---|---|
| [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.

## What is the default timeout for Workspaces, and can it be changed?

The default Workspaces session timeout is **30 minutes** but you can change this if you need to. Two values control the session timeout.

- The session timeout defined in your Security Manager
- The `idleTime` attribute defined in your `transact-config.json`

To learn about the session timeout in Journey Workspaces and how to change it, see Session Timeout.

# Journey Workspaces FAQ - Logging in

> NOTE
>
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## 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 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.

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 Client Services representative for assistance.

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

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 may be due to a CSRF token implementation. To learn more about this issue including how to address it, see CSRF token issue.

## 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

NOTE

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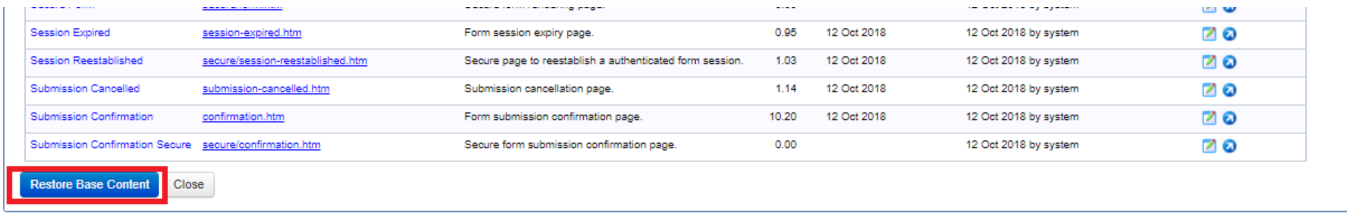
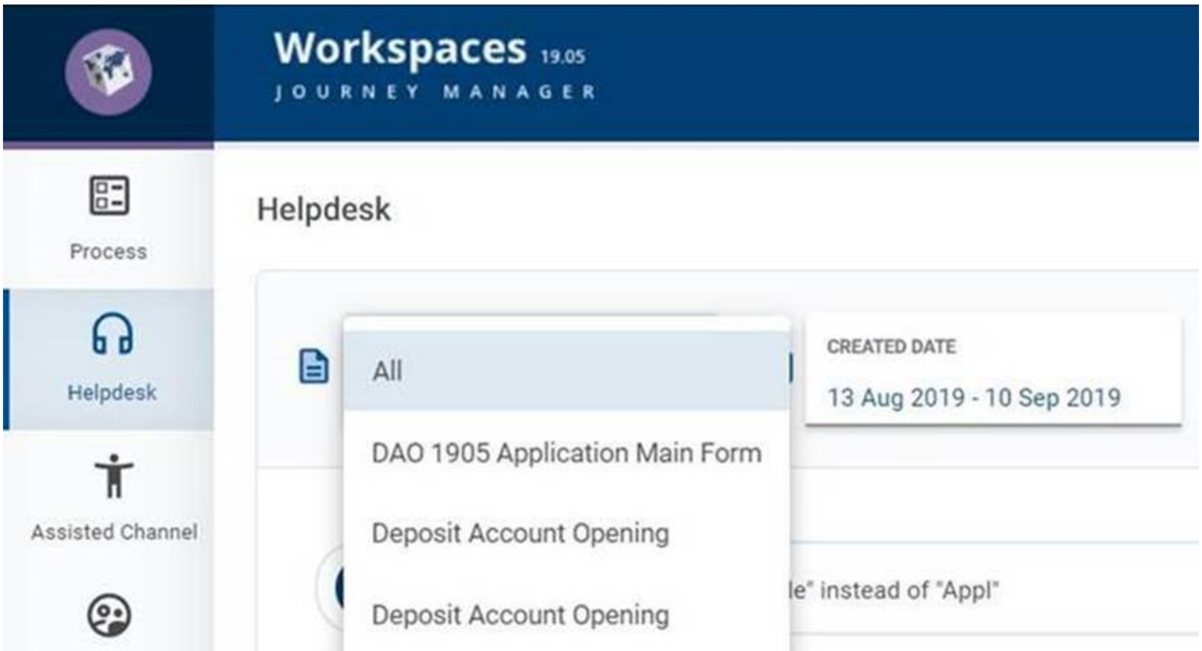
## When I try to change or reset my password, I can't enter my old password

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.




## 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?

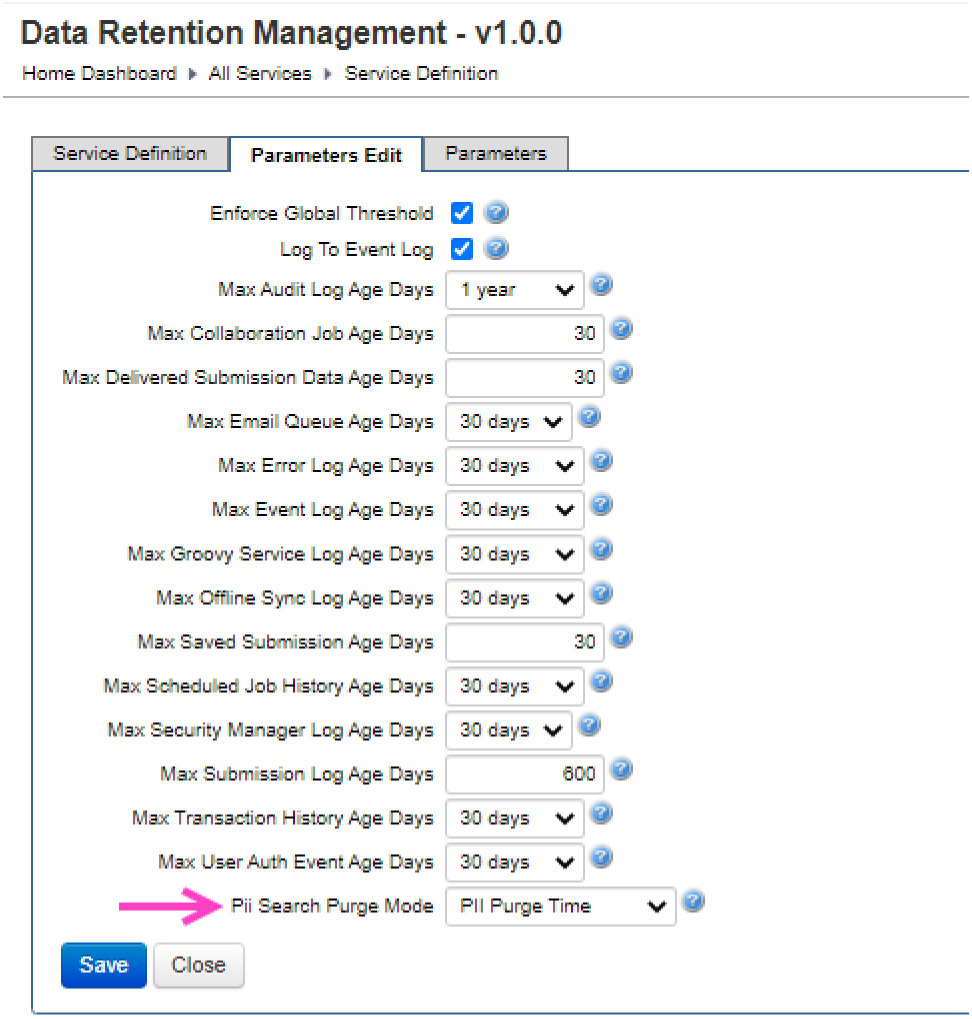
Yes, this is supported starting from Workspaces 20.05.

## 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**.

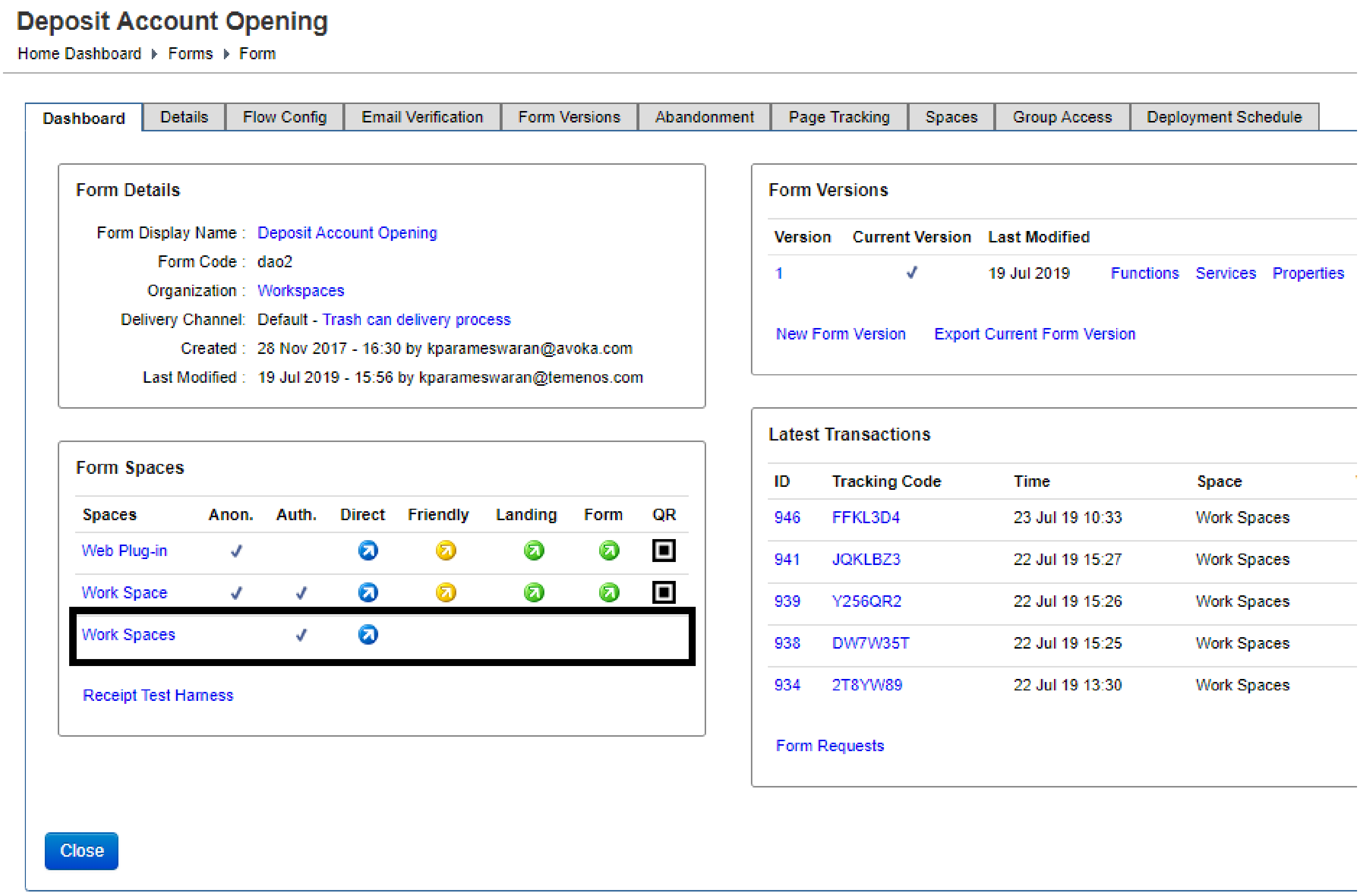



NOTE

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

## I can't view certain transactions in Workspaces

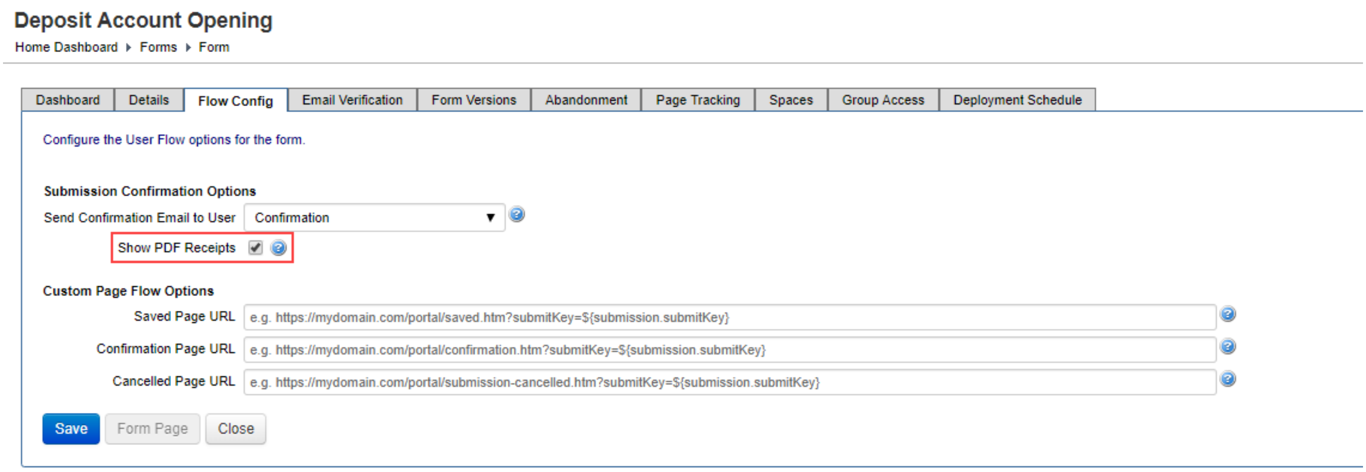
Make sure the form related to the transaction is linked to the “Work Spaces” form space in Journey Manager.



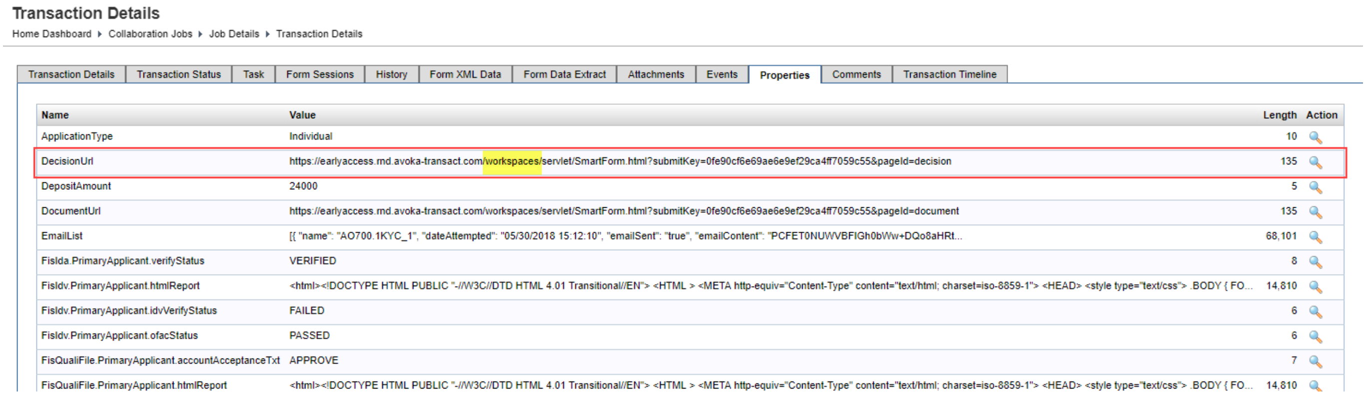

## I can't view the PDF receipts - is this due to access restrictions?

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/`.



Transaction Details

Home Dashboard ▸ Collaboration Jobs ▸ Job Details ▸ Transaction Details

Transaction Details | Transaction Status | Task | Form Sessions | History | Form XML Data | Form Data Extract | Attachments | Events | Properties | Comments | Transaction Timeline

| Name | Value | Length | Action |
|---|---|---|---|
| ApplicationType | Individual | 10 | |
| DecisionUrl | https://earlyaccess.rnd.avoka-transact.com/workspaces/servlet/SmartForm.html?submitKey=0fe90cf6e69ae6e9ef29ca4ff7059c55&pageId=decision | 135 | |
| DepositAmount | 24000 | 5 | |
| DocumentUrl | https://earlyaccess.rnd.avoka-transact.com/workspaces/servlet/SmartForm.html?submitKey=0fe90cf6e69ae6e9ef29ca4ff7059c55&pageId=document | 135 | |
| EmailList | [{ "name": "AO700.1KYC_1", "dateAttempted": "05/30/2018 15:12:10", "emailSent": "true", "emailContent": "PCFET0NUWVBFIGh0bWw+DQo8aHRt... | 68,101 | |
| FisIda.PrimaryApplicant.verifyStatus | VERIFIED | 8 | |
| FisIdv.PrimaryApplicant.htmlReport | <html><!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"> <HTML > <META http-equiv="Content-Type" content="text/html; charset=iso-8859-1"> <HEAD> <style type="text/css"> .BODY { FO... | 14,810 | |
| FisIdv.PrimaryApplicant.idvVerifyStatus | FAILED | 6 | |
| FisIdv.PrimaryApplicant.ofacStatus | PASSED | 6 | |
| FisQualiFile.PrimaryApplicant.accountAcceptanceTxt | APPROVE | 7 | |
| FisQualiFile.PrimaryApplicant.htmlReport | <html><!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"> <HTML > <META http-equiv="Content-Type" content="text/html; charset=iso-8859-1"> <HEAD> <style type="text/css"> .BODY { FO... | 14,810 | |

## 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.

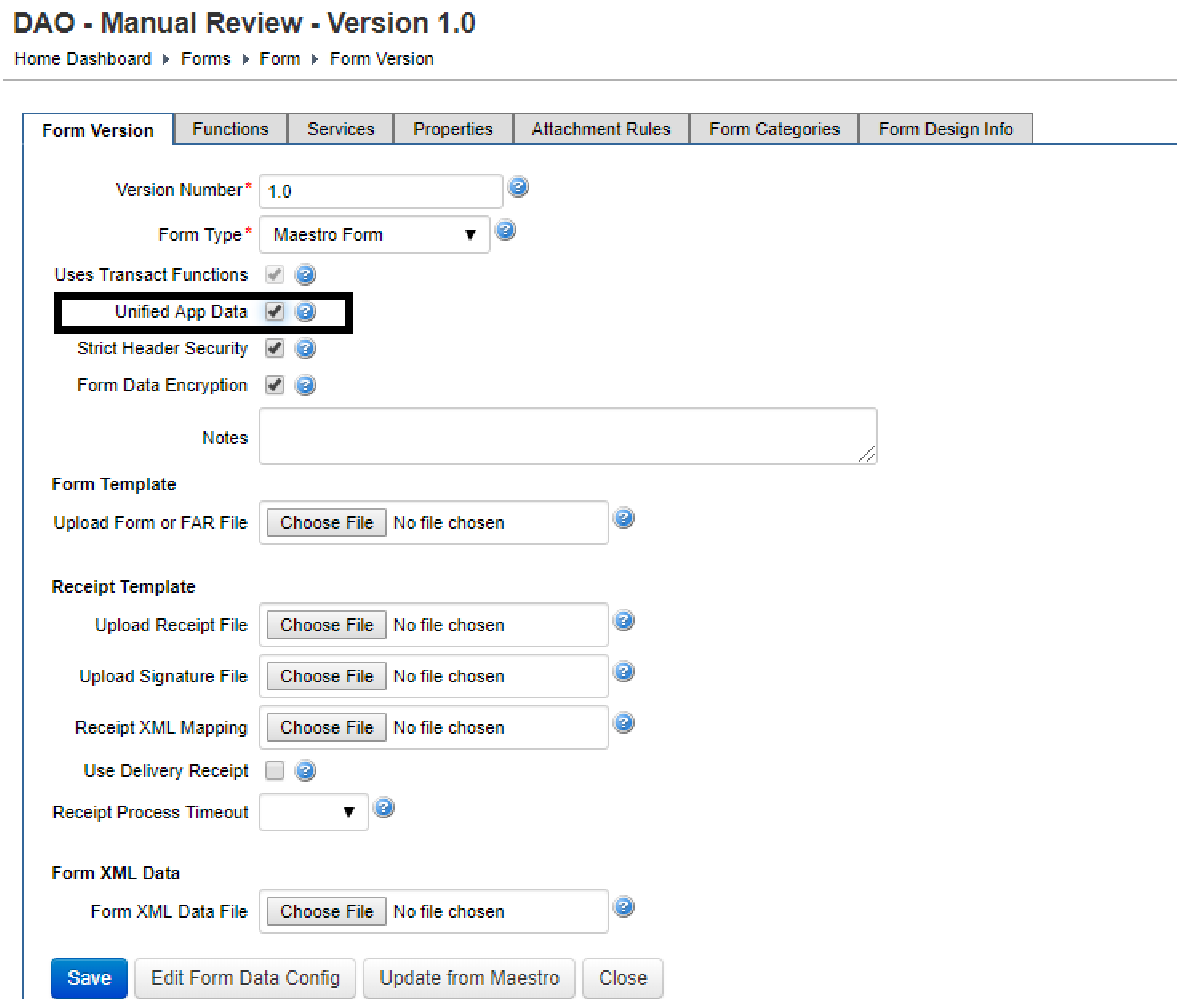
# Journey Workspaces FAQ - Maestro Form

NOTE

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

## 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