temenos

Temenos Infinity Collection Module: Administrator Guide

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Administrator Guide

System Management Auditing

System Management auditing can be activated by an institution to track the following information when actions are performed, or changes are made, within certain System Management screens:

- The first and last name of the user who performed the action.
- The name of the System Management screen that was saved, the item that was changed, or the item that was deleted.
- The date and time that the save, modification, or deletion occurred.

Each time an auditable action occurs, the action is recorded in the database audit log, and a notification alerting about the action is sent to a user designated by the institution.

This topic provides an overview of the System Management screens that support auditing, the actions that are auditable for each screen, the notifications sent when an auditable action occurs, as well as the steps an institution must take to activate this functionality.

Enabling System Management Auditing

System Management Auditing is activated in the database by a Temenos Representative. If this functionality is desired, please contact a Temenos Representative to activate System Management Auditing for the institution, and define the email address(es) that should receive a notification when auditable actions occur within the System Management screens.

> If System Management Auditing is enabled, at least one email address to receive the notifications must be defined, or an error appears each time an auditable action is performed in System Management.

Auditable Actions and Notifications

By activating System Management Auditing, institutions are provided with the ability to record specific actions that occur in certain System Management screens. Reference the table below for an overview of the screens that support auditing, and the actions that are auditable for each System Management screen:

System Management Screen	Location in System Management	Auditable Action	Comment
Collection Queue Refresh Order	System Management > Collections > Collection Queue Refresh Order	Save is clicked in the screen.	
Collection Queue Work Order	System Management > Collections > Collection Queue Work Order	Save is clicked in the screen.	

Collection Queues Details Screen	System Management > Collections > Collection Queues	Save or Save and Close is clicked in the screen that appears when creating, copying, or editing a Collection Queue.	This occurs when a Collection Queue is created, copied, or edited. The Audit Log and Email Notification include the name of the Collection Queue that is created or modified.
Collection Queue Delete Confirmation Screen	System Management > Collections > Collection Queues	Yes is clicked in the window that appears when deleting a Collection Queue.	The Audit Log and Email Notification include the name of the Collection Queue that is deleted.
Event Processing Details Screen	System Management > Collections > Event Processing	Save or Save and Close is clicked in the screen that appears when creating, copying, or editing an Event/Action pair.	This occurs when an Event Process is created or edited. The Audit Log and Email Notification include the name of the Event/Action pair that is created or modified.
Event Processing Delete Confirmation Screen	System Management > Collections > Event Processing	Yes is clicked in the window that appears when deleting an Event/Action pair.	The Audit Log and Email Notification include the name of the Event/Action pair that is deleted.

Rules Management	System Management > Collections > Rules Management	Save is clicked for the rule application.	

When one of the above actions occur, an entry for the action is added to the Audit Log in the database, and an email notification is sent to the email address(es) on record for System Management Auditing at the institution.

Depending on the auditable action, the user may receive a notification including data from one of the following system-defined email templates:

> The following email templates only exist in the database, and are not configurable. These templates are automatically sent when the corresponding action is performed in a System Management screen.

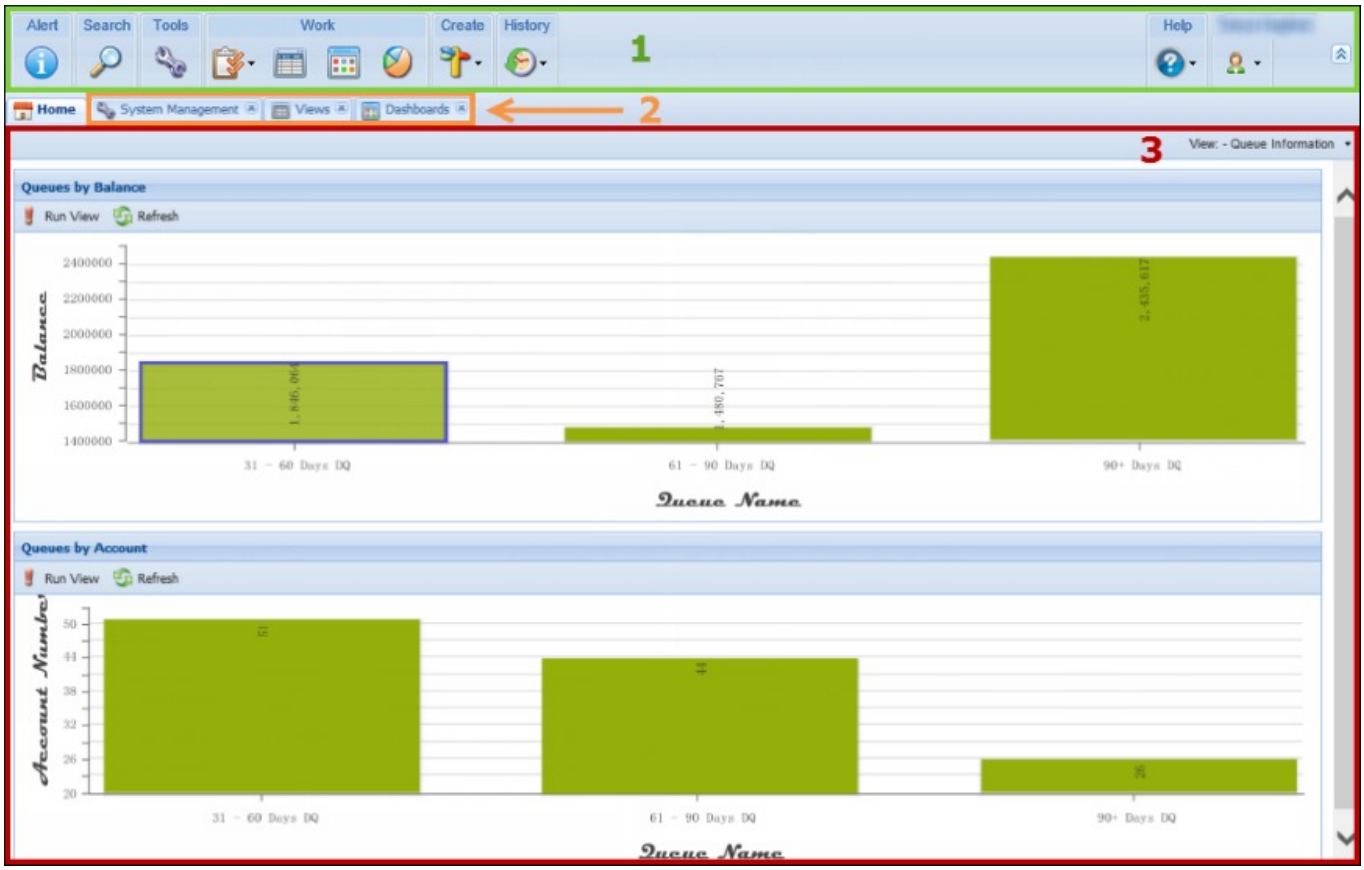
> The "From" address included in the email is the Collections Email Address configured for the institution in the General tab of System Management > Administrative Settings.

Email Template	When Sent	Email Text	Example
Email Template for System Management Screen saves	When Save is clicked in one of the following System Management screens: • Collection Queue Refresh Order • Collection Queue Work Order • Rules Management	<User First Name><User Last Name> saved <Name of System Management Screen> on <Date (MM/DD/YYYY)> at <Time (HH:MM)>.	John Smith saved Service RuleApp on 08/08/2017 at 12:22PM.

Email Template for System Management Detail saves	When Save or Save and Close is clicked in the screen that appears to create, copy or edit an item in one of the following System Management screens: • Collection Queues • Event Processing	<User First Name><User Last Name> saved <Name of System Management Item> on <Date (MM/DD/YYYY)> at <Time (HH:MM)>.	John Smith saved Event: DQ Field Changed on 08/08/2017 at 12:22PM.
Email Template for System Management deletions	When Yes is clicked in the window that appears when deleting an item from one of the following System Management screens: • Collection Queues • Event Processing	<User First Name><User Last Name> deleted <Name of System Management Item> on <Date (MM/DD/YYYY)> at <Time (HH:MM)>.	John Smith deleted Event: DQ Field Changed on 08/08/2017 at 12:22PM.

Desktop and Ribbon Bar Overview

The Desktop displays upon completing the log-in process and features the (1) Ribbon Bar, (2) Tabs, and (3) Home Dashboard.



Ribbon Bar

The Ribbon Bar is located at the top of the desktop, and contains a variety of icons, which are shortcuts to functions and processes within Temenos Infinity.

Below is an overview of the icons that contain administrator functionality within the Ribbon Bar:

The **Alert** icon allows a user to view institutional alerts configured by the system administrator in System Management > **Alerts**.

See Alerts for more information about how to use the Alert icon.

The Search function allows users to search Temenos Infinity for existing accounts, cases, and persons. The ability to use the Search feature is determined by the value set for the following permission within the Permissions tab in System Management > Users, or System Management > Groups > Security Groups:

- Workspace permission under the Collections category.

For an overview of the behavior that occurs when a permission is set to None, View, or Change, please see the Permissions Tab section of the Users or Security Groups topic in this guide.

The **System Management** icon allows administrators to manage and customize numerous features throughout Temenos Infinity. This includes both Module-specific functions as well as Core functions that are shared among all Temenos Infinity modules (e.g. managing users and security groups, setting up queues, activating and configuring Connectors).

Queues are an efficient way to organize people, accounts and case tasks using specific account, task, and/or account holder attributes.

The **Queues** icon allows a user to view and access Collection Queues configured by system administrators in System Management > Collections > Collection Queues and System Management > Collections > Case Queues.

Views are interactive reports that offer the ability to target accounts or cases based on defined criteria, creating a workable list.

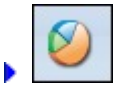
The **Views** icon allows administrators to create, copy, edit, and delete Views.

> Please see the Views topic for more information about Views within Temenos Infinity.

Dashboards are configurable web pages, which can display charts, views, reports, or other predefined web parts to provide detailed or summarized data.

The Dashboards icon allows administrators to create, copy, edit, and delete Dashboards.

> Please see the Dashboards topic for more information regarding what an administrator can do with Dashboards within Temenos Infinity.



Reporting in Temenos Infinity is integrated with Microsoft SQL Server Reporting Services, which allow an administrator to format reports and select various output formats. Reports can be run on demand by anyone who has permission to run the report or can be scheduled to run at certain times to view information about accounts, cases, and/or User performance in Temenos Infinity.

The **Reports** icon allows administrators to create, copy, edit, and delete Reports.

See Reports for more information about what an administrator can do with Reports within Temenos Infinity.

The **Help** drop-down allows a user to access the Help Menu. Reference the table below to assist with administrator specific functions within the Help Menu:

Help Menu Option	Description

Archive History	The Archive History screen displays a purge account history. System Administrators can use the Archive Data function found within System Management to perform the purge function. See Archive Data for more information.
User Manual - Collection	The User Manual – Collection Help option provides users with access to the User Manual for Temenos Infinity's collection module. This option provides administrators with a direct link to the Temenos Infinity Help Documentation.
User Manual - Service	The User Manual – Service Help option enables user access the User Manual for Temenos Infinity's service module. This option provides administrators with a direct link to the Temenos Infinity Help Documentation.
Join Webex Session	This link is used to quickly receive live assistance from a Temenos Customer Care Representative. Once Join WebEx Session is selected, a new browser window opens and automatically navigates to the Temenos WebEx site with a Pre-Session Form displayed. See the Help section for steps on how to join a webex session.
Go to Support Center	This link directs administrators to the Temenos Customer Support Center and requires successful login to the Collaboration Portal.
Submit Support Case	This link allows administrators to report any issues that may arise in Temenos Infinity in order for them to be tracked and fixed in a timely manner. For instructions on how to create a New Support Case, please refer to the **Customer Care Link** on the main Support Page in the Collaboration Portal or contact a Customer Care Representative.
Queue Analyzer	The Queue Analyzer determines an account's queue eligibility. System administrators can enter an account identifier and click **Analyze** to display a list of all queues in a work order and identify if an account does or does not meet queue criteria. See the Queue Analyzer for more information.

For more information, please see the Help topic within the End-User Guide.

Tabs

When multiple pages are open within Temenos Infinity, each one is displayed on a separate tab. Tabs make it easy to switch between pages and have multiple persons open at one time.

The amount of workspaces a user can have open at a time is a parameter set within the database. The value of this parameter is set to five, but can be configured by the system administrator. If a user attempts to open more tabs than allowed by the parameter, an error is received in the workspace. For more information, please contact a Temenos Professional Services Representative.

Home Dashboard

The Home Dashboard provides users with a unique view of important information and is assigned by a system administrator in System Management > Users > Dashboards.

Within the Dashboards tab, the assigned dashboards for the user are listed in alphabetical order. The home dashboard that displays on the Desktop is the first dashboard that appears in this list.

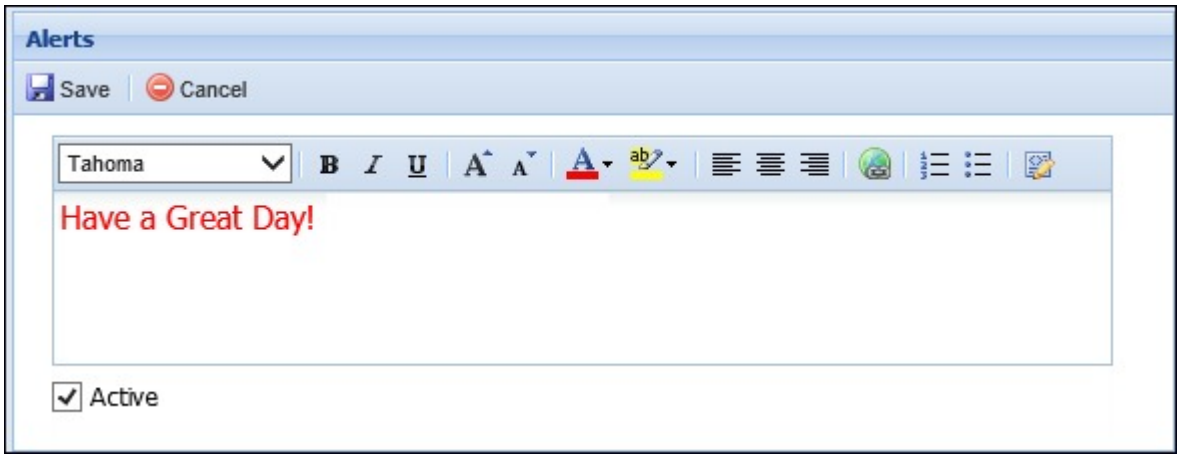
> For more information, please see the Dashboards topic in this guide.

Alerts

The Alerts screen allows for the customization of the alert message displayed when is clicked within the Ribbon Bar.

> There can only be one active alert in the system at a time.

To view or edit the alert, navigate to System Management > Alerts.



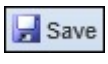
To configure the Alert that appears in Temenos Infinity:

- Enter the desired text to be displayed within the text box.

  > The character limit for an alert is 1000. However, the Alerts screen contains a Source Edit button, ,that displays the Alert message in HTML format including all of the characters being used.

- Select the **Active** check box to activate the alert.

  > Deactivating the alert disables the in the ribbon bar.

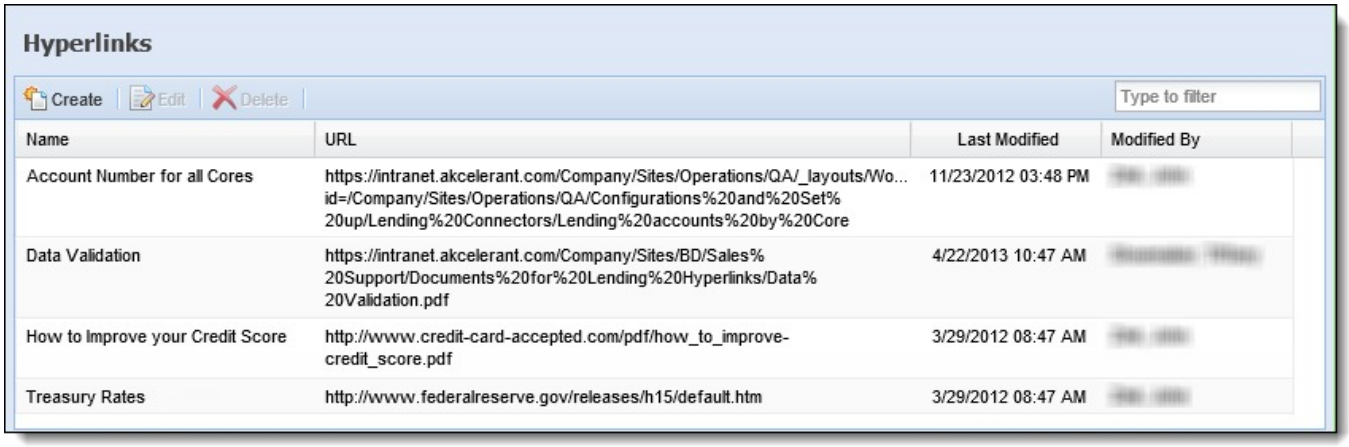
- Click  to retain the alert. Click to disregard the changes.

Hyperlinks

The Hyperlinks page allows administrators to create links to external sites and make them available in the specified Areas in the Tools menu. This feature provides end users easy access to external websites without navigating

outside of Temenos Infinity.

The Hyperlinks managed within this screen are displayed in the Tools menu when a workspace is open.

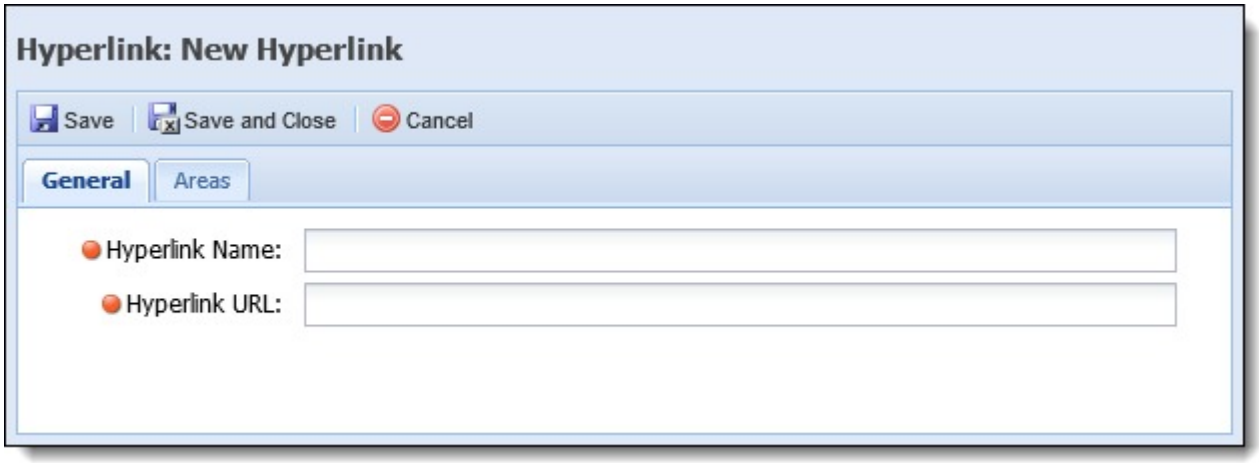


Hyperlink Attributes

All hyperlinks share common attributes that are defined while creating or editing a hyperlink.

General

The General tab provides the ability to define the hyperlink name and URL.

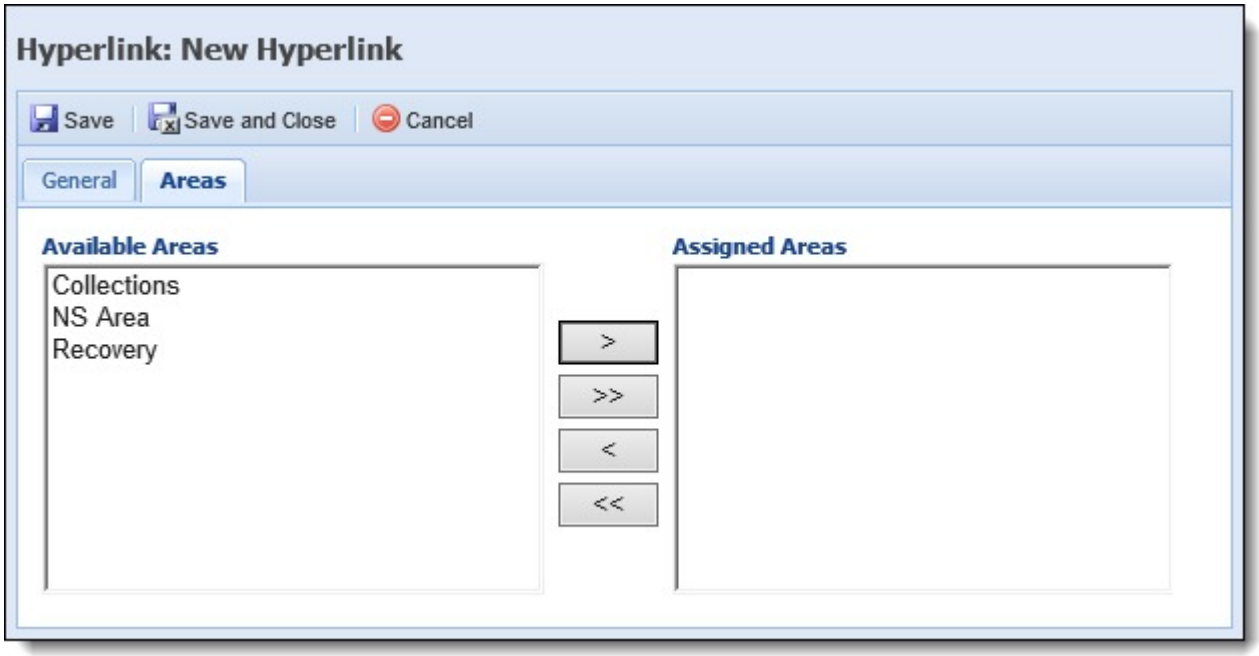


The following attributes are located within the General tab:

Attribute	Description
Hyperlink Name	Enter a unique name for the hyperlink. This is a required field.
Hyperlink URL	Enter the Hyperlink URL. This is a required field. HTTP:// or HTTPS:// must be included in front of the hyperlink. A domain, such as .org or .com, is also required at the end of the hyperlink URL. If HTTP:// or HTTPS:// is not included in front of the hyperlink, a Validation error is received upon saving the hyperlink.

Areas

The Areas tab provides the ability to determine in which areas of the workspace the hyperlink is available.



Within this tab, select the desired areas from the Available Areas list and move them to the Assigned Areas list. When the hyperlink is created it will become available to users in the assigned areas.

Creating a Hyperlink

- On the hyperlink page click **Create**.
- The New Hyperlink page appears.
- Navigate through the tabs and input the necessary attributes.
- When finished click **Save** or **Save and Close** to save the Hyperlink and return to the Hyperlinks listing page.
- The new Hyperlink is now populated on the Hyperlink page and is available in the Tools menu in the workspace menu toolbar.

Editing a Hyperlink

- Select the Hyperlink that is to be edited to highlight it, click **Edit**.
- The Edit Hyperlink screen appears.
- Make any necessary changes to the attributes in the General and Areas tabs.
- When finished click **Save** or **Save and Close** to save the Hyperlink and return to the Hyperlinks listing page. Click **Cancel** to return to the Hyperlinks page without saving.

Deleting a Hyperlink

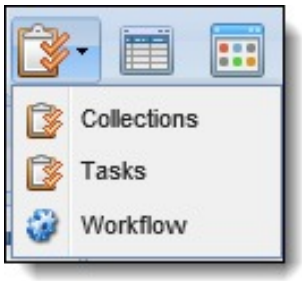
- Select the Hyperlink that is to be deleted to highlight it, click **Delete**.
- A confirmation message appears. Click **Yes** to delete the Hyperlink.
- Click **No** to return to the Hyperlinks page without deleting.

Collection and Recovery Queues

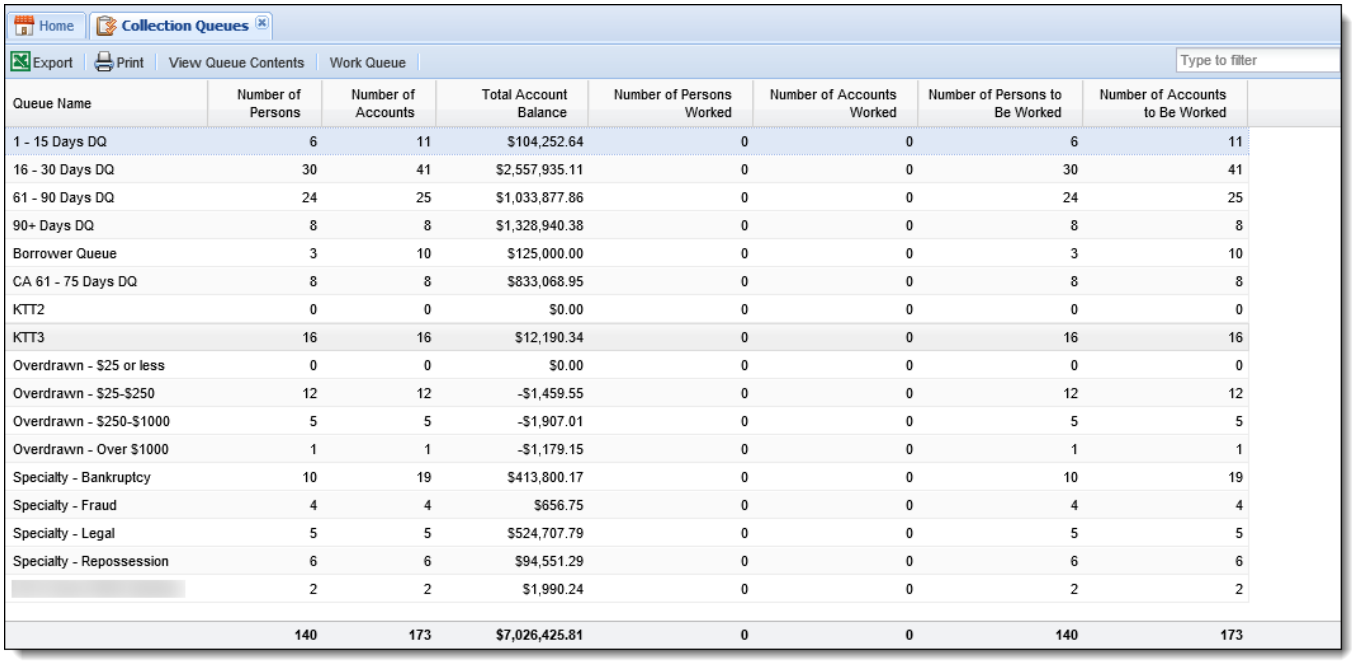
Collections Queues are the delinquency and recovery queues that are configured in Temenos Infinity. Accounts are placed into these queues to make up a users list of work.

Accessing a Collections Queue

Within the Work section of the ribbon bar, click the **Queues** drop-down. Select **Collections**.



The Collection Queues tab appears containing a list of the available Collections Queues.



Queue Name	Number of Persons	Number of Accounts	Total Account Balance	Number of Persons Worked	Number of Accounts Worked	Number of Persons to Be Worked	Number of Accounts to Be Worked
1 - 15 Days DQ	6	11	$104,252.64	0	0	6	11
16 - 30 Days DQ	30	41	$2,557,935.11	0	0	30	41
61 - 90 Days DQ	24	25	$1,033,877.86	0	0	24	25
90+ Days DQ	8	8	$1,328,940.38	0	0	8	8
Borrower Queue	3	10	$125,000.00	0	0	3	10
CA 61 - 75 Days DQ	8	8	$833,068.95	0	0	8	8
KTT2	0	0	$0.00	0	0	0	0
KTT3	16	16	$12,190.34	0	0	16	16
Overdrawn - $25 or less	0	0	$0.00	0	0	0	0
Overdrawn - $25-$250	12	12	-$1,459.55	0	0	12	12
Overdrawn - $250-$1000	5	5	-$1,907.01	0	0	5	5
Overdrawn - Over $1000	1	1	-$1,179.15	0	0	1	1
Specialty - Bankruptcy	10	19	$413,800.17	0	0	10	19
Specialty - Fraud	4	4	$656.75	0	0	4	4
Specialty - Legal	5	5	$524,707.79	0	0	5	5
Specialty - Repossession	6	6	$94,551.29	0	0	6	6
	2	2	$1,990.24	0	0	2	2
	140	173	$7,026,425.81	0	0	140	173

To work a queue, highlight the queue within the list and click **Work Queue**. The first account in the queue scheduled to be worked is presented in the workspace.

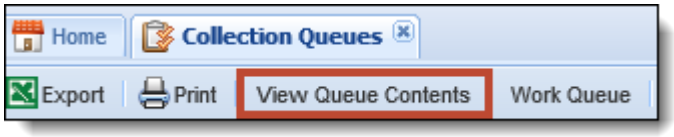
> The order in which accounts are presented to be worked is dependent on the queue sorting configuration set by a system administrator in System Management.

When a queue is worked, depending on the settings, the user can navigate through the queue by clicking the **Get Next Account** button in the workspace toolbar. Clicking this option opens the next account/person in the queue depending on the sorting set by the system administrator.

> From within the workspace, users can select other queues to work from the **Queue** drop-down located above the related accounts grid. For more information on navigating the workspace, see the Navigating help section of the User Guide.

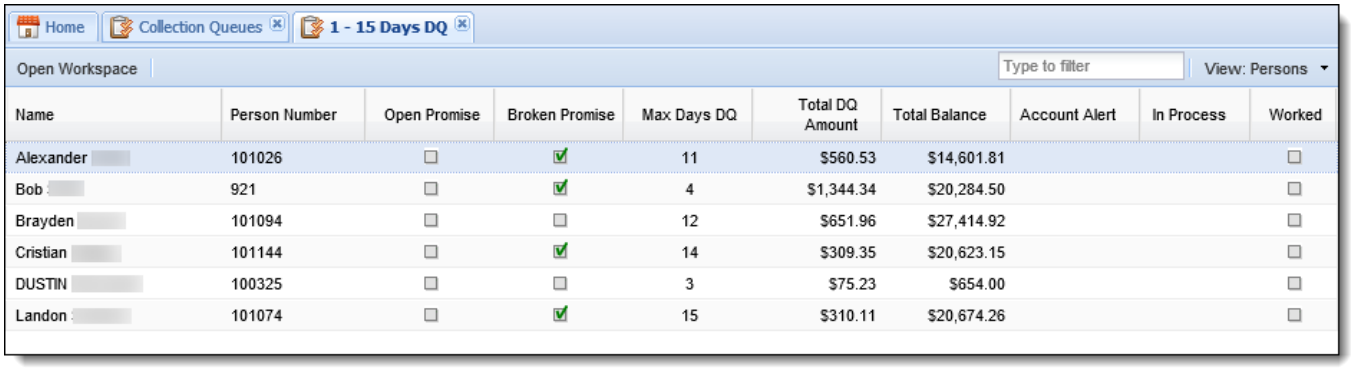
Viewing a Queue's Contents

To view a queue's contents prior to working it, double-click the queue or select the queue and click **View Queue Contents** to view its contents in a new tab.



A list of the persons or accounts in the queue is displayed, depending on the View selected in the top right corner of the tab. Double-click a person or account or select the person/account and click **Open Workspace** to view the person or account in the workspace.

> Users may not be able to access all persons/accounts if their Account Restrictions settings are lower than the persons/accounts they are attempting to open. These settings are at the discretion of the system administrator.



Name	Person Number	Open Promise	Broken Promise	Max Days DQ	Total DQ Amount	Total Balance	Account Alert	In Process	Worked
Alexander	101026	☐	☑	11	$560.53	$14,601.81			☐
Bob	921	☐	☑	4	$1,344.34	$20,284.50			☐
Brayden	101094	☐	☐	12	$651.96	$27,414.92			☐
Cristian	101144	☐	☑	14	$309.35	$20,623.15			☐
DUSTIN	100325	☐	☐	3	$75.23	$654.00			☐
Landon	101074	☐	☑	15	$310.11	$20,674.26			☐

Exporting the Collection Queue List

From the collections queue tab, export the queue list to Excel by clicking Export.

A prompt appears to Open or Save the spreadsheet. Click **Open** to view the spreadsheet.

	A	B	C	D	E
1	Queue Name	Number of Persons	Number of Accounts	Total Account Balance	Number of Persons Worked
2	1 - 15 Days DQ	10	10	$111,689.87	0
3	31 - 60 Days DQ	51	51	$2,009,276.27	0
4	61 - 90 Days DQ	29	29	$1,043,788.40	0
5	90+ Days DQ	7	7	$1,097,811.52	0
6	CA 61 - 75 Days DQ	10	10	$840,867.41	0
7	Canadian Zip Code Queue	5	5	$1,328,971.33	0

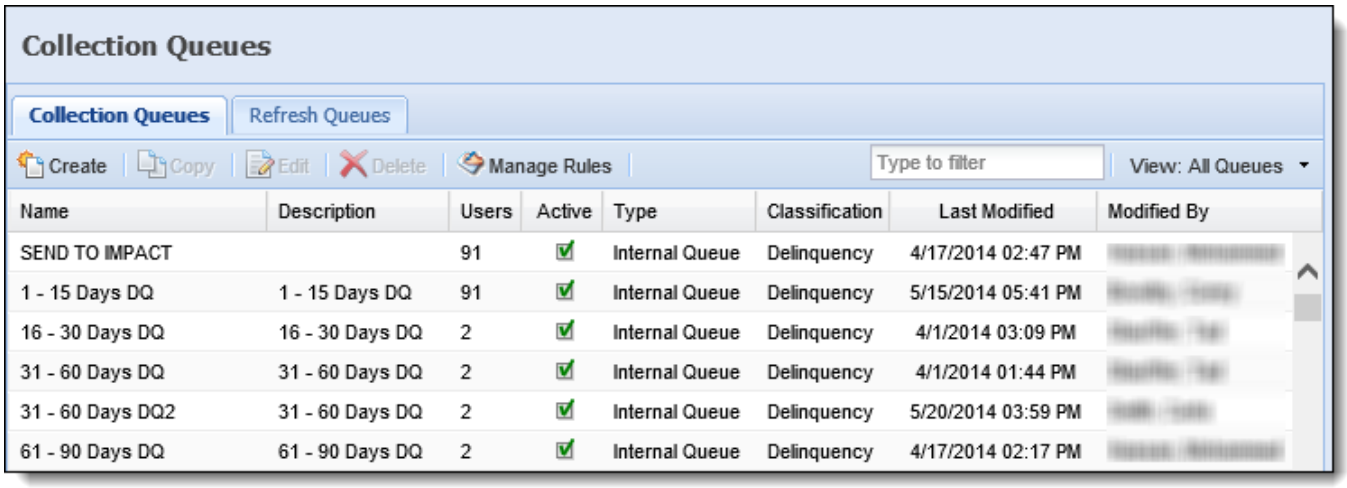
Printing the Collection Queue List

From the collections queue tab, print the queue list by clicking Print.

A print preview window is displayed as well as the standard Internet Explorer printer settings window. Select the desired printing preferences and click **Print**.

Collections and Recovery Queues

Collection Queues allow financial institutions to organize, manage, and prioritize work based on different account and/or person attributes. They are created in System Management > Collections > Collection Queues.



The Collection Queues page contains two tabs: Collection Queues and Refresh Queues.

Collection Queues

From the Collection Queues tab, administrators can create queues, copy existing queues, edit existing queues, delete queues, and manage rules, if the rules functionality is enabled for the institution.

> The Manage Rules button is not available if advanced queuing is not active. See Advanced Queuing for more information.

The grid displayed on the Collection Queue tab contains the following columns:

Column Name	Description
Name	Name of the Collection Queue.
Description	Description of the Collection Queue.
Users	Number of users assigned to the Collection Queue.
Active	If checked, the Collection Queue is active in Temenos Infinity.
Type	Displays whether the Collection Queue is Internal, Dialer, or Third Party.
Classification	Displays whether the Collection Queue is Delinquency or Recovery.
Last Modified	Denotes when the last modification was made on the Collection Queue.
Modified By	Denotes who made the last modification on the Collection Queue.

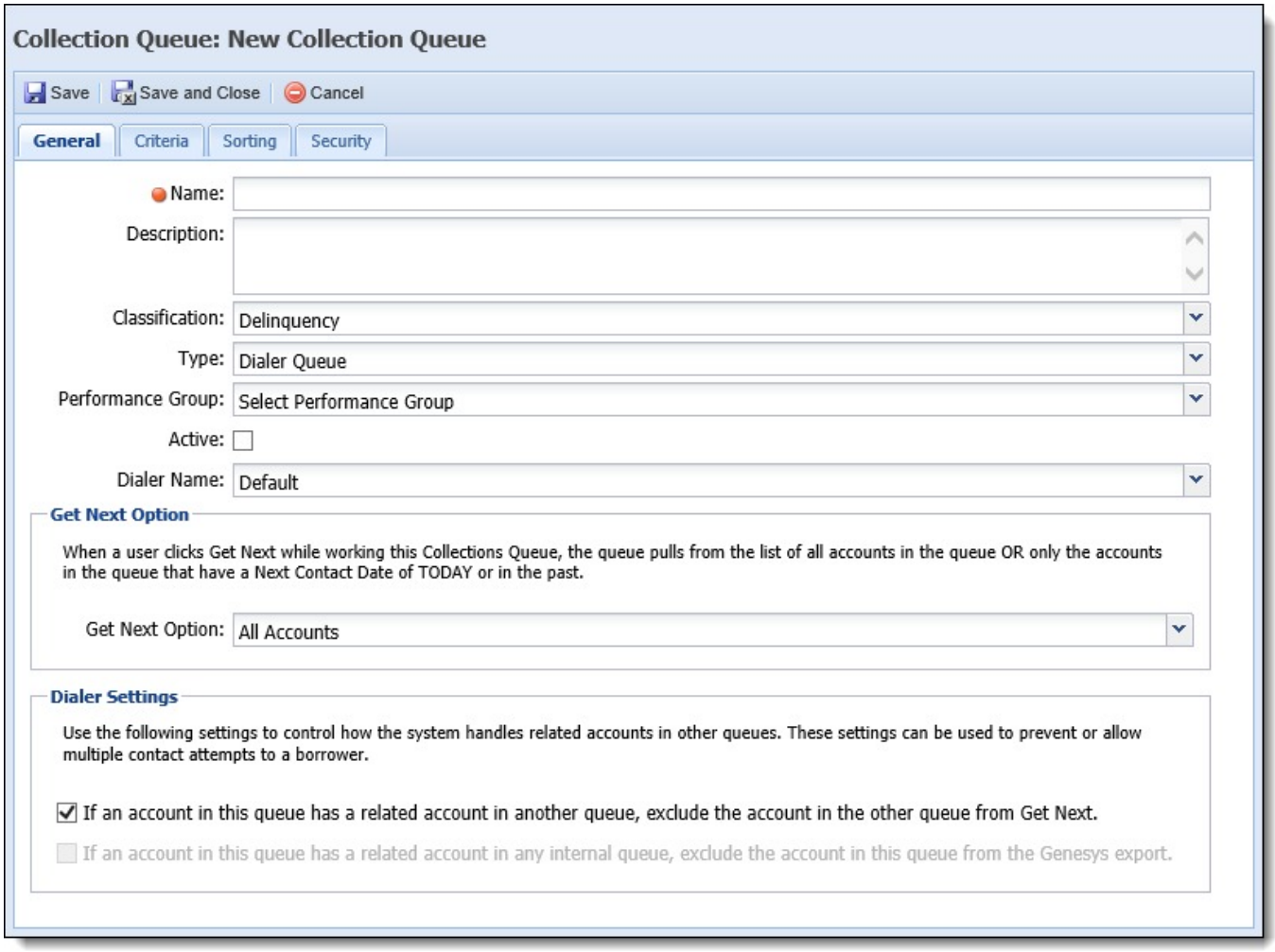
Collection Queue Attributes

All Collection Queues include the following attributes, which are defined when creating, copying, or editing a Collection Queue:

- General
- Criteria
- Sorting
- Security

General

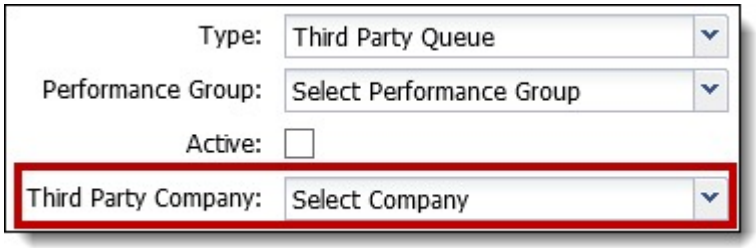
The General attributes allow administrators to activate the queue, as well as define the basic settings for the queue, such as name, type, and Get Next Options.



The following attributes are defined within the General tab:

Field	Description
Name	Enter a name for the queue. This is a required field.
Description	If necessary, provide a description. This gives other administrators more information about the queue.
Classification	Select **Delinquency** or **Recovery** from the drop-down. If using the Recovery module, recovery queues house charged-off accounts separate from delinquent accounts. The Recovery option does not display if the Recovery module is not active.

<table>
<tr><td>Type</td><td>Select Dialer Queue, Internal Queue or Third Party Queue from the drop-down. This controls other settings that may appear and may need to be specified on the General tab for the specific queue type. Reference the following table for an overview of each queue type:
<table>
<tr><th>Queue Type</th><th>Description</th></tr>
<tr><td>Dialer Queue</td><td>A queue that uses dialer functionality, such as Genesys (Genesys), to contact account holders. The accounts within this queue are sent to a dialer with the dialer export.
This option does not appear if dialer functionality is not enabled.</td></tr>
<tr><td>Internal Queue</td><td>A queue used internally at the financial institution. An Internal Queue is built using criteria to filter accounts and is then assigned to be worked by specific collectors.</td></tr>
<tr><td>Third Party Queue</td><td>A queue set up as a repository for accounts to be worked by a Third Party. The accounts within this queue are sent to a specified third party company using export functionality.</td></tr>
</table>
If the SWBC AP Account Services connector is active, the SWBC AP Account Services Queue option is available within this drop-down to create a queue to be used with the connector's functionality.</td></tr>
<tr><td>Performance Group</td><td>If a specific Performance Group is working this queue, select the group from the drop-down. Performance Groups are configured in System Management > Groups > Performance Groups and allow administrators to evaluate groups of users with similar capabilities. Data regarding calls, contacts, and promises are calculated and tracked for the performance group.</td></tr>
<tr><td>Active checkbox</td><td>Click the Active checkbox to make the queue active. To deactivate a queue, clear the checkbox. If a queue is deactivated, a queue refresh must be run to reassign accounts that are still in the queue.</td></tr>
</table>

Third Party Company	This drop-down list only appears when Third Party Queue is selected as the queue type. Select a third party company to associate with the queue being created.  The companies listed within this drop-down are created and managed in System Management > Address Book > **Companies**.
Dialer Name	This drop-down only appears when Dialer Queue is selected from the Type drop-down. Select the name of the Dialer that is configured in Temenos Infinity. If Genesys is selected, a Campaign Name drop-down appears to associate a campaign configured in Genesys (Genesys) with the queue being created. Select a campaign name from the drop-down list. For more information on Genesys (Genesys) campaigns, please see the Genesys connector guide.
Get Next Option	Select **All Accounts** or **Only Next Contact Accounts** from the drop-down. This controls the behavior of the Get Next button in the workspace for users working the queue. "All Accounts" pulls from the list of all accounts in the queue when Get Next is clicked. "Only Next Contact Accounts" pulls from a list of accounts that have a next contact date and time greater than or equal to the current date and time when Get Next is clicked.

<table>
<tr><td>Dialer Settings</td><td>This section only appears when Dialer Queue is selected from the Type drop-down. It also appears when Genesys is selected from the Dialer Name drop-down. These settings control how Temenos Infinity handles related accounts in other queues, thus preventing or allowing multiple contact attempts to the borrower.

Both parameters cannot be set at the same time and both parameters are only available for selection for a Genesys queue. If creating a Genesys queue, the setting defaults to the second parameter.

The Dialer settings are as follows:

<table>
<tr><th>Dialer Setting</th><th>Description</th></tr>
<tr><td>If an account in this queue has a related account in another queue, exclude the account in the other queue from Get Next.</td><td>When selected, this setting tells the sytem that the Dialer is responsible for making the contact attempt to the borrower. If a borrower has a credit card (which is in this Dialer queue) and an auto loan (which is in a non-dialer queue for delinquent autos), the auto loan is not presented to the user working the auto queue with Get Next.</td></tr>
</table></td></tr>
</table>

	If an account in this queue has a related account in any internal queue, exclude the account in this queue from the Genesys export.	When selected, this setting tells the system not to export the account to Genesys (Genesys). If a borrower has a credit card (which is in this Dialer queue) and an auto loan (which is in a non-dialer queue for delinquent autos), the auto loan is presented to the user working the auto queue. A note is automatically added to the credit card indicating that it was excluded from the Genesys export because there is a related account in another queue.

Criteria

Within the Criteria tab, use the Criteria Builder to determine the criteria accounts need to meet in order to fall into the queue.

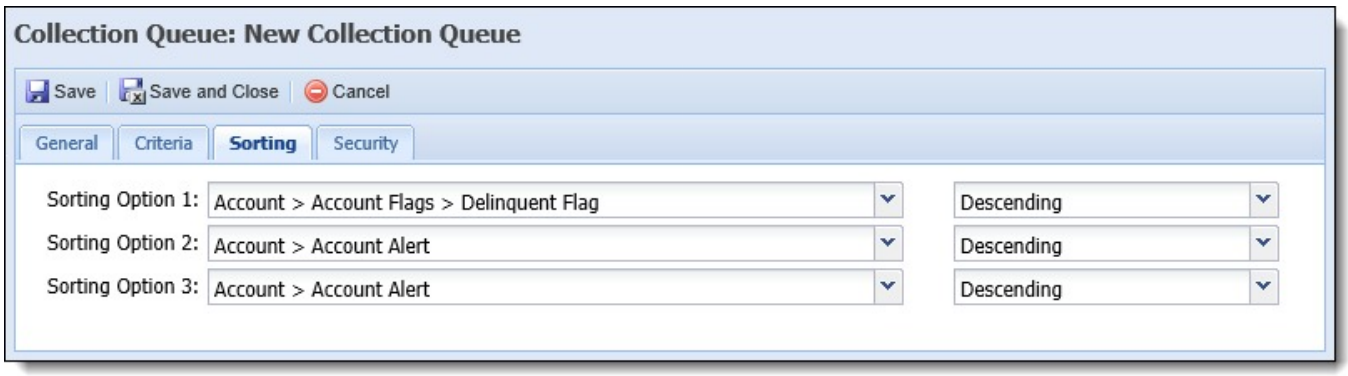
> Refer to the Criteria Builder topic in this guide for more information.

This tab is not visible if Advanced Queuing is turned on. The criteria builder is account-specific and only used for Basic Queuing. Administrators should use business rules to define queues based on account holder and/or account attributes. For more information on determining queue criteria through rules for Advanced Queuing, see the Advanced Queuing section within this topic.

Sorting

On the Sorting tab, determine the priority order of how accounts get presented to an end-user when they are working a queue. If more than one account has the same value for the field defined in Sorting Option 1, the field defined in Sorting Option 2 is evaluated for prioritization.

For example, a collection queue's sorting option 1 is set to use Days DQ in descending order and sorting option 2 field is set to Delinquent Amount in descending order. During queue assignment, hundreds of accounts are assigned with a Days DQ value of 60. Since the Days DQ value is the same for all of these accounts, sorting option 2: Delinquent Amount is used to determine the priority order. When the end-user clicks the Get Next button, an account 60 days delinquent with the greatest delinquent amount is opened and worked.

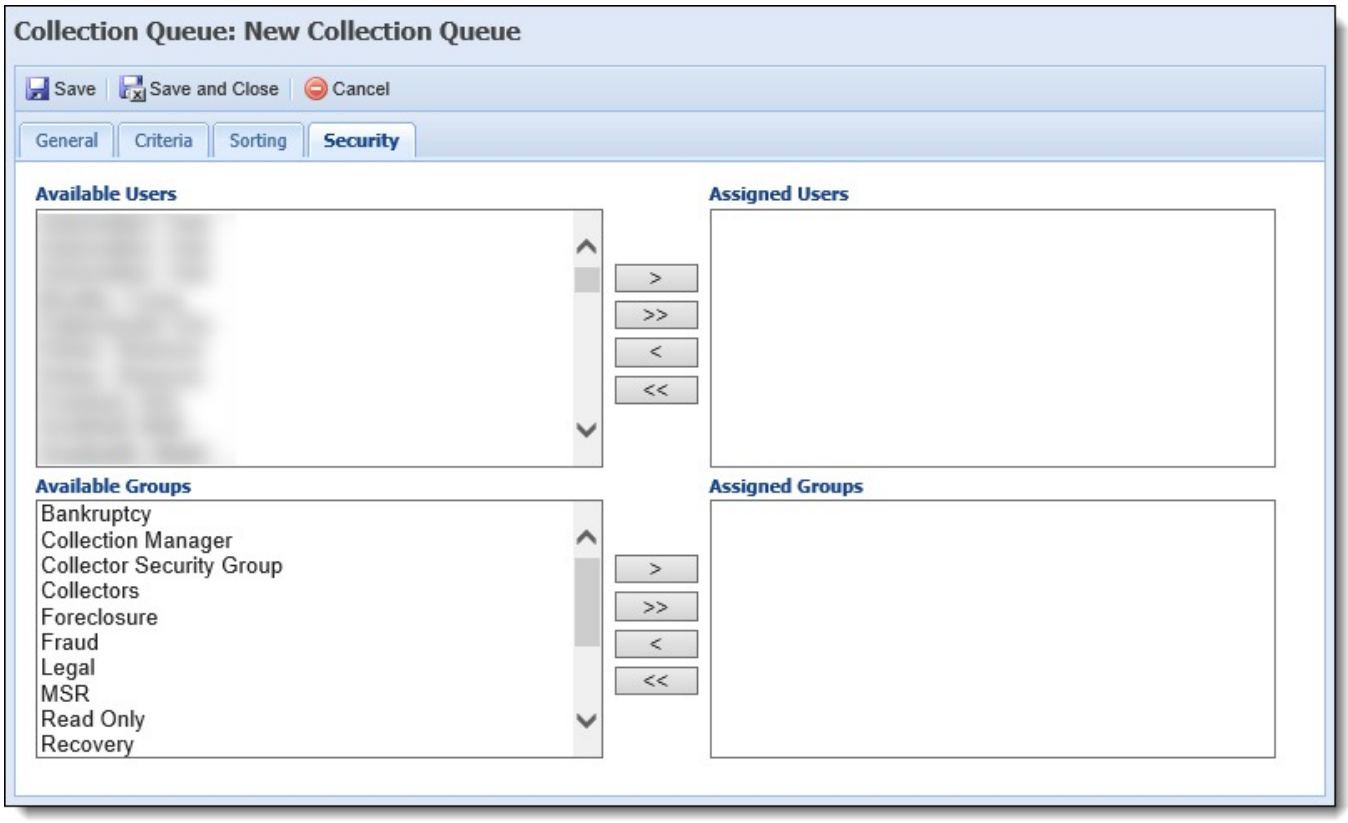


> The order in which accounts are presented is first determined by the Get Next option selected within the General tab, regardless of the sorting criteria defined here. When All Accounts is selected as the Get Next option, accounts with a Next Contact Time active in the database are presented to be worked first regardless of the sorting criteria. After all of the accounts with a set next contact time have been presented, the defined sorting options take place.
>
> When Only Next Contact Accounts is selected as the Get Next option, accounts with a future contact date or time are not presented to the user even if they fall under the sorting criteria. Only accounts with a contact date or time in the past and present are presented to be worked in the queue regardless of the sorting option(s) selected.

Security

On the Security tab, determine which Users and/or Groups have access to the new queue.

> In addition to being assigned to the queue within this tab, the user or security group must also be granted View or Change access to the Workspace permission in order for workspaces to be opened from the queue in the Ribbon Bar. This permission is set under the Collection category of the Permissions tab in System Management > Users or System Management > Groups > Security Groups. For more information, please see the Users or Security Groups topic in this guide.



Collection Queue Actions

Administrators are able to perform the following actions within the Collection Queues tab:

- Create a Queue

To create a Collection Queue:

- Click Create above the grid area.
- Define the General attributes.
- When all General attributes are complete, navigate to the Criteria tab to determine which accounts meet the criteria to be placed in teh queue.
- Once all criteria is defined, select the Sorting tab to set the priority order of how accounts get presented in the workspace.
- After the priority order is set, assign users and security groups permission to the queue in the Security tab.
- Upon completion of all attributes, click Save and Close to add the new queue.
- Once saved, the new queue populates on the Collections Queues page, and for the users/groups assigned to the queue, the queue can be accessed from the Ribbon > Queues > Collections.

> If authoring Business Rules, it is recommended to click **Sync.Lookups** within the Application Toolbar in Rules Manager before authoring a new rule in order to ensure the newly created Collection Queue is available within the Rules Management Application.

Copy a Queue

To copy a Collection Queue:

- Highlight the desired queue, and click Copy. The Copy Collections Queue screen appears.
- Change the name of the queue in the General tab, and then navigate through each tab to make any other necessary changes.
- When finished, click Save and Close to add the new queue.

Edit a Queue

To edit a queue:

- Double-click the desired queue in the grid, or highlight the queue, and click Edit.
- The Edit Collections Queue screen appears.
- Navigate through the tabs and make any necessary changes.
- When finished, click Save and Close to retain the queue settings.

Delete a Queue

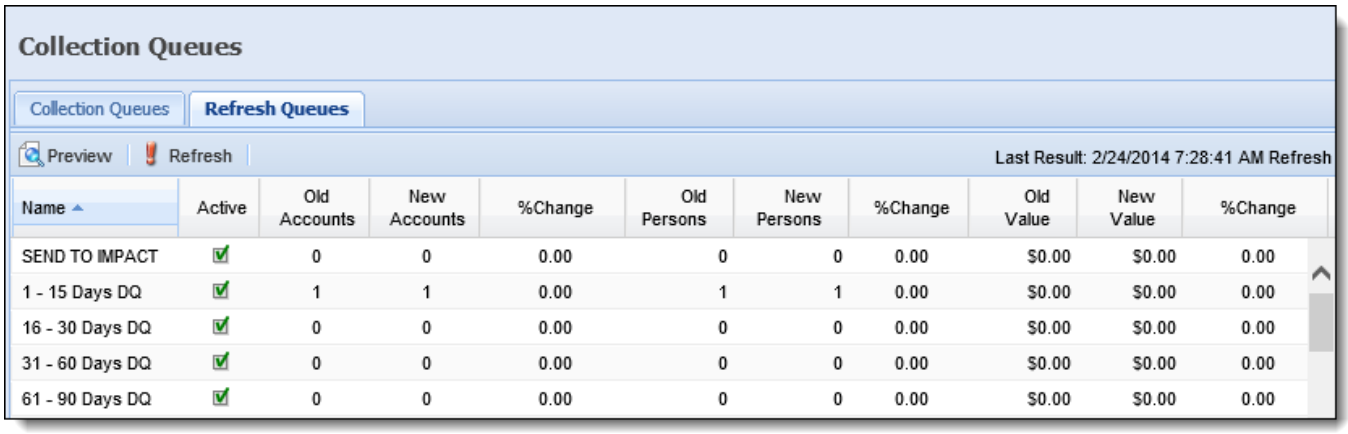
> Queues that have accounts assigned to them, or are assigned an an Assignment or Distribution workflow step cannot be deleted.

To delete a queue:

- Highlight the desired queue in the grid, and click Delete.
- A confirmation message appears. Click **Yes** to delete the queue. Click **No** to return to the queue page with deleting the queue.

Refresh Queues

The Refresh Queues tab allows administrators to manually refresh all collection queues in Temenos Infinity. Although Collections queues are automatically refreshed on a daily basis following the nightly batch import, administrators can also initiate a queue refresh at any time in order to instantly adapt to any necessary change in focus.



Name	Active	Old Accounts	New Accounts	%Change	Old Persons	New Persons	%Change	Old Value	New Value	%Change
SEND TO IMPACT	✓	0	0	0.00	0	0	0.00	$0.00	$0.00	0.00
1 - 15 Days DQ	✓	1	1	0.00	1	1	0.00	$0.00	$0.00	0.00
16 - 30 Days DQ	✓	0	0	0.00	0	0	0.00	$0.00	$0.00	0.00
31 - 60 Days DQ	✓	0	0	0.00	0	0	0.00	$0.00	$0.00	0.00
61 - 90 Days DQ	✓	0	0	0.00	0	0	0.00	$0.00	$0.00	0.00

If a queue is dependant on a process or if a Profile Import is being used as the primary source of data for accounts, the Queue Refresh process should be dependent on whether the process completes.

The following columns display in the grid:

Column Name	Description
Name	Name of the Collections Queue.
Active	Denotes whether the queue is active in Temenos Infinity.
Old Accounts	Displays the number of accounts in the queue prior to the last refresh.
New Accounts	Displays the number of accounts in the queue after the last refresh.
%Change	The Percent Change between old and new accounts.
Old Persons	Displays the number of persons in the queue prior to the last refresh.
New Persons	Displays the number of persons in the queue after the last refresh.
%Change	The percent change between old and new persons.
Old Value	Displays the old value in $ in the queue prior to the last refresh.
New Value	Displays the new value in $ in the queue after the last refresh.
%Change	The percent change between old and new values.

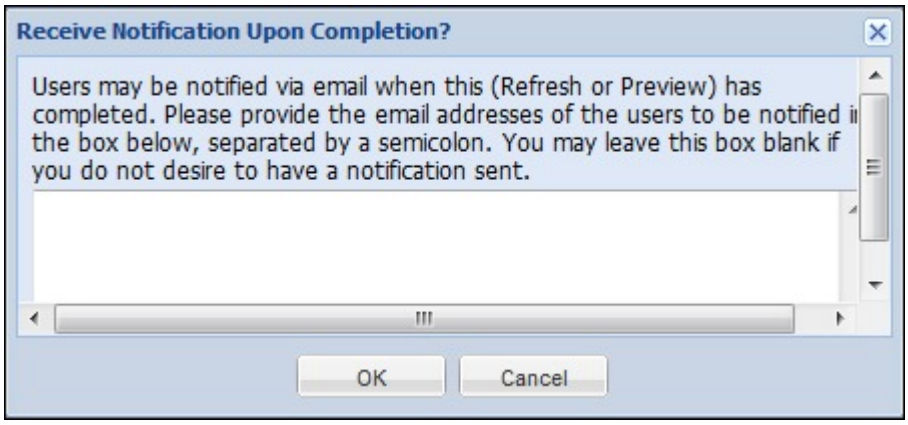
Refresh Queue Actions

Administrators are able to perform the following actions within the Refresh Queues tab:

- Preview Queue Refresh

Prior to performing the actual refresh, preview the refresh by clicking above the grid area.

The Receive Notification Upon Completion window appears. This screen allows administrators to enter email addresses, separated by semi-colons, to receive a notification when the preview process is complete. Enter in desired email address or leave it blank, and click **OK**.

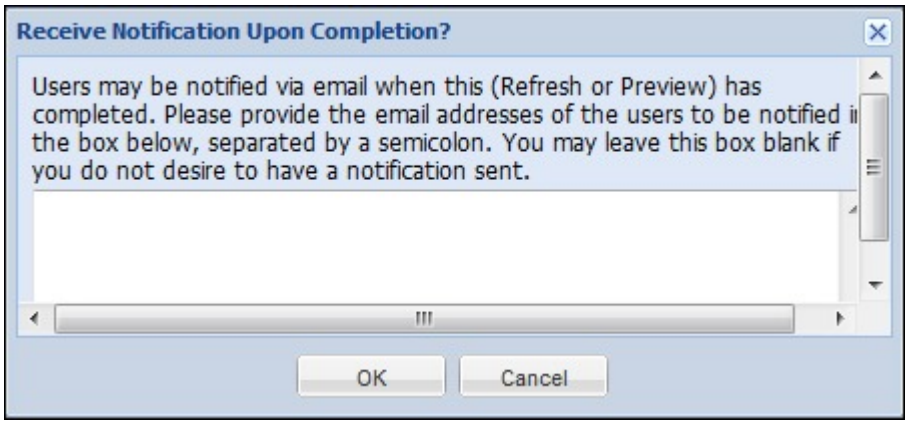


A notification appears showing the refresh preview has started. When the process completes, the grid refreshes showing the new information.

Refresh Queues

To actually run the refresh, click Refresh above the grid on the Refresh Queues tab.

The Receive Notification Upon Completion window appears. This screen allows administrators to enter email addresses, separated by semi-colons, to receive a notification when the refresh process is complete. Click **OK**. Enter in desired email address or leave it blank, and click **OK**.



A notification appears showing that the queue refresh has started. When the refresh is complete, the grid refreshes showing the new information. The timestamp of the last refresh displays above the grid area.

Collection Queue Refresh Order

The Collection Queue Refresh Order page allows administrators to set the order in which Collections Queues are refreshed. In the event that an account meets the criteria of more than one queue, the account is placed in the queue with the higher refresh order.

> This feature is only available with Basic Queuing. It is not visible in System Management if Advanced Queuing is active.

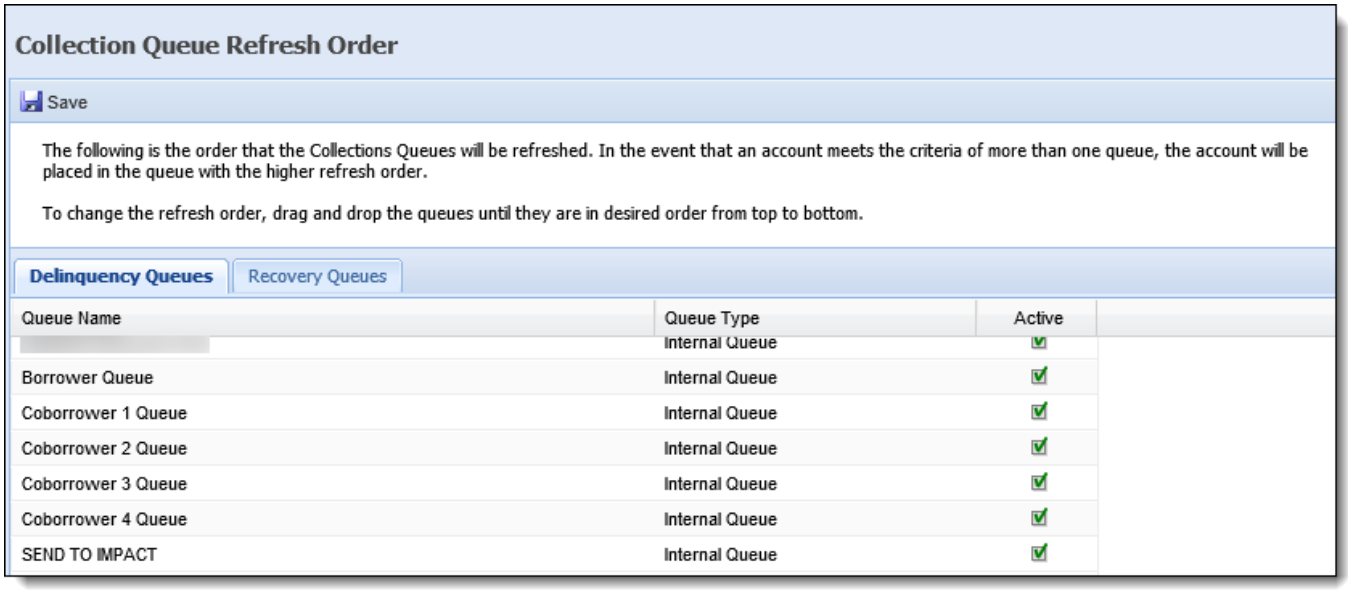
> The Recovery tab is for customers utilizing Temenos Infinity's Recovery module, as it has its own refresh order.

The following columns display in both the Delinquency Queues tab and the Recovery Queues tab:

Column Name	Description

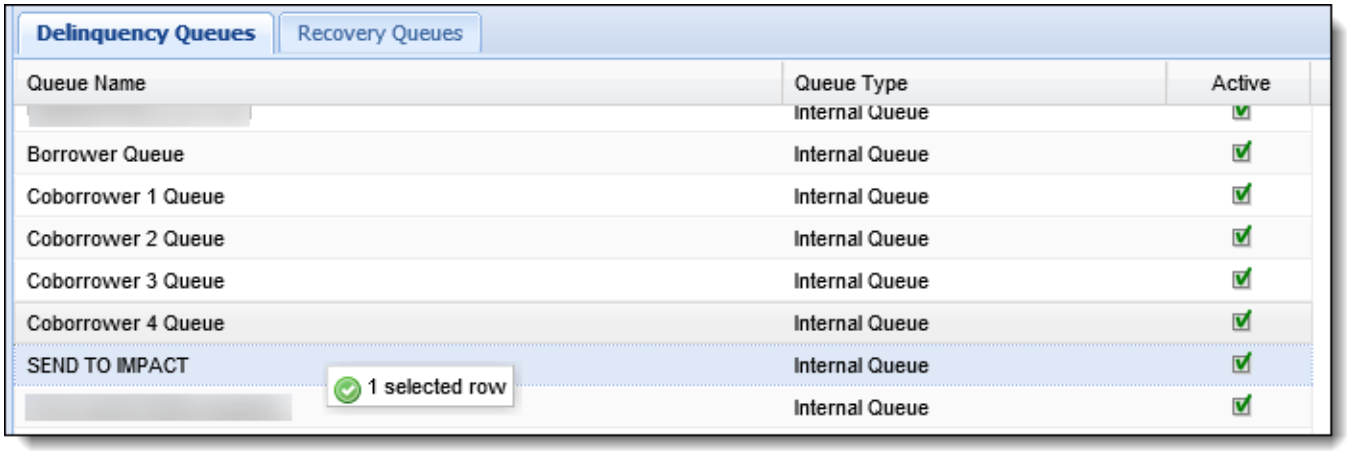
Queue Name	Name of the Collections Queue.
Queue Type	Displays the type of Collections Queue.
Active	If checked, the queue is active in Temenos Infinity.

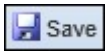
The list from top to bottom is the order in which the queues are refreshed.



Edit the Queue Refresh Order

- Click and hold a queue from the list.
- Drag and drop the queue to the desired position.



- Click  to retain the updated the refresh order. A success message appears showing that the changes were saved successfully.

Collection Queue Work Order

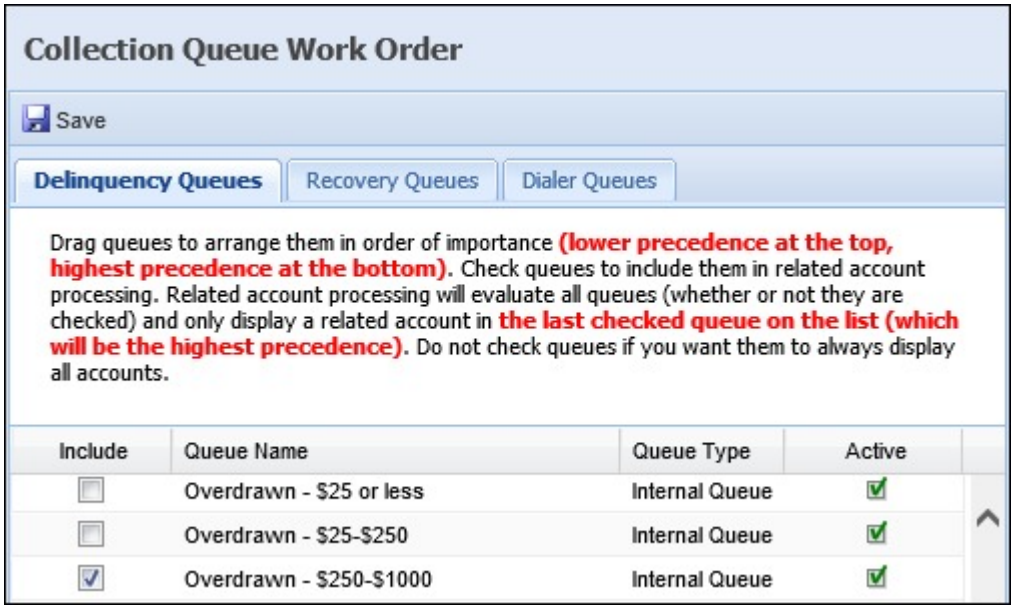
The Collection Queue Work Order ensures related accounts across multiple queues are presented in a specific order. Queue Work Order and Related Accounts Processing is defined from System Management > Collections >

Collection Queue Work Order.

> This feature is only available with Basic Queuing. It is not visible in System Management when Advanced Queuing is active.

From the Collection Queue Work Order page administrators can determine queue precedence and identify the order in which related accounts in different queues are presented to users with the workspace Get Next functionality.

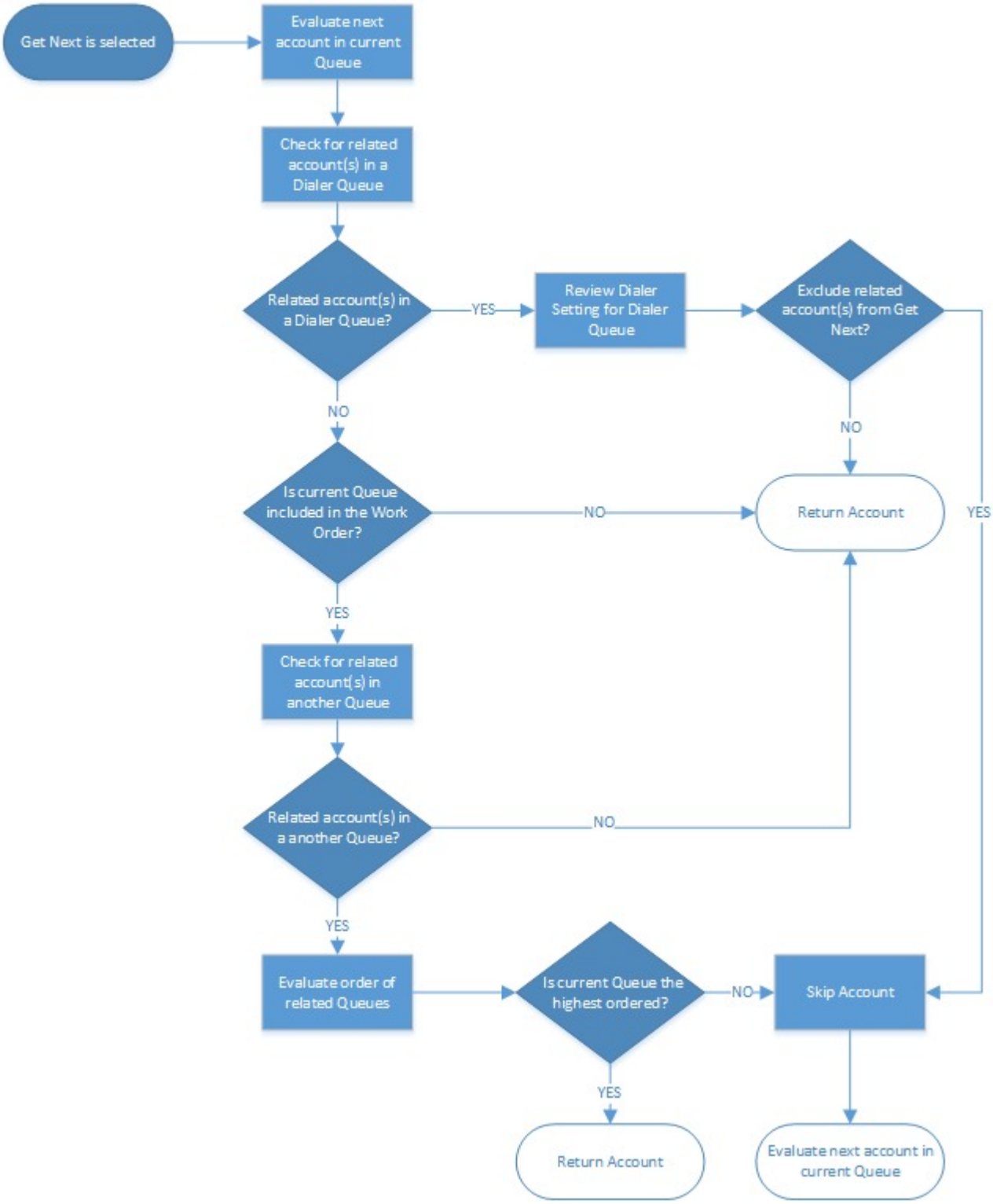
Queue precedence is defined by the order in which the queues appear on this page. Queues at the bottom of this page are considered higher priority over the queues listed at the top. When the Include column is checked, a queue is included in the queue work order and accounts within the highest ranked queue are returned first by the Get Next function in the workspace.



Including a queue in the queue work order also enables related accounts processing to evaluate and determine the order in which related accounts are presented with Get Next. For example, after the account in the highest queue has been presented and worked, the next related account is presented with Get Next. This functionality is an efficient way to not only prioritize the order in which queues are worked, but also ensure that experienced collectors are provided with the opportunity to work a person's entire relationship, not simply one account.

Related Accounts Processing

Related Accounts Processing evaluates all internal and dialer queues to identify accounts related to the same person existing across multiple collection queues. By default, the related accounts process evaluates all queues, regardless of whether or not they are included in the queue work order, but does not return accounts according to queue precedence unless the queue has been included. Reference the Get Next diagram below for an overview of how the related accounts process evaluates and returns an account when Get Next is selected in the workspace:



The scenarios below provide an overview of the queue work order and related accounts functionality using the following account holder information:

Person: Joe Smith

Queues: Delinquent Loans - Auto queue- Account #1001234

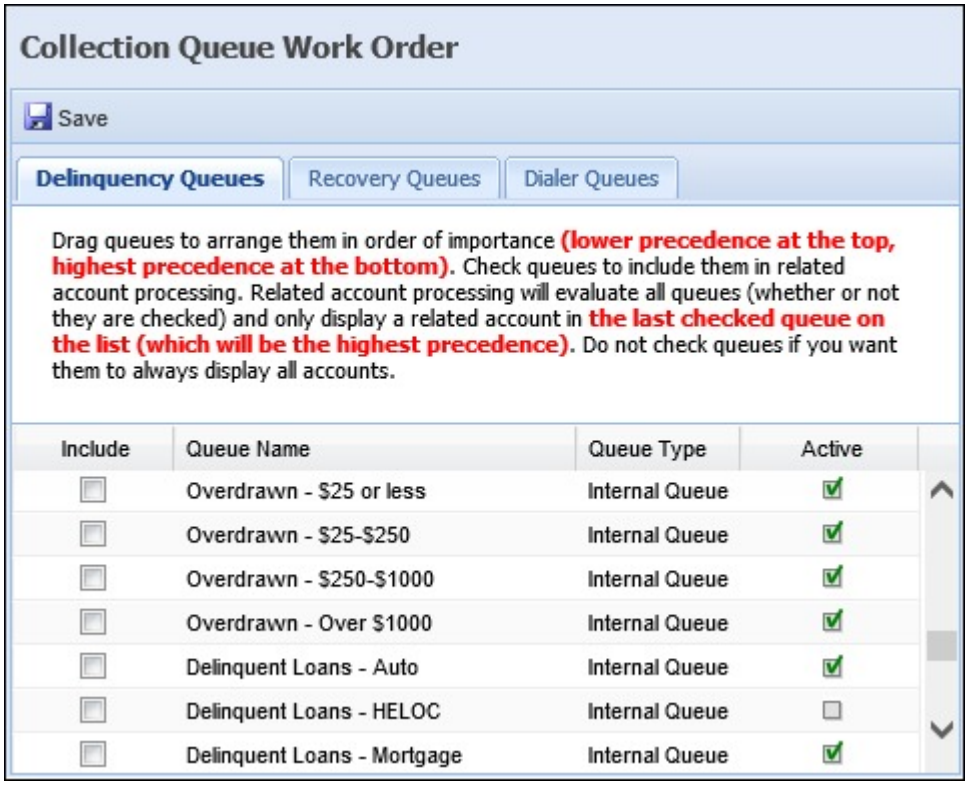
Delinquent Loans - Mortgage queue- Account #1005678

These scenarios demonstrate how accounts are prioritized and presented to a user with Get Next when a queue is

not a dialer and whether or not it is included in the queue work order.

Scenario 1- No queues included in the queue work order

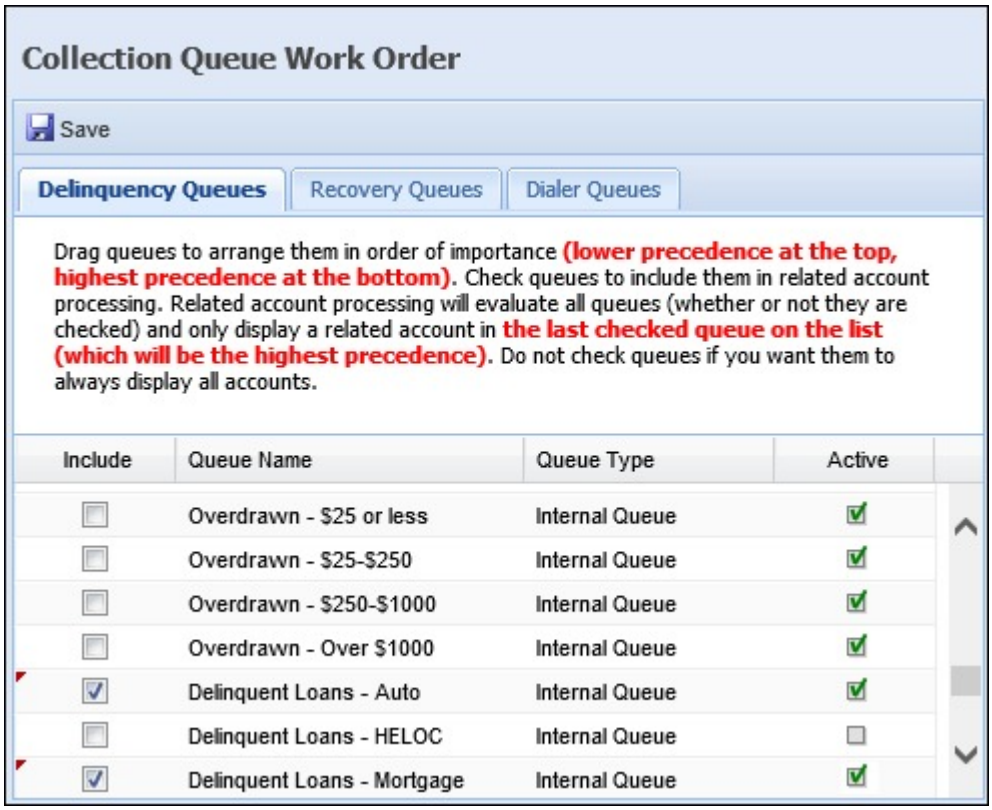
In the this scenario, none of the queues listed have been included in the queue work order since the Include check box has not been enabled. Since queue work order is not enabled, Joe Smith's related accounts are returned within the queue to which they are assigned.



In this example, Joe's Auto account, account #1001234, is presented to the user working the Delinquent Loans – Auto queue, while Joe's mortgage account, account #1005678 is presented to the user working the Delinquent Loans - Mortgage queue.

Scenario 2- Both queues included in the queue work order

In this scenario, both of the queues listed have been included in the queue work order since the Include check box has been enabled. Since queue work order has been enabled, related accounts processing takes place and Joe's accounts are returned based on the queue precedence defined on this page.



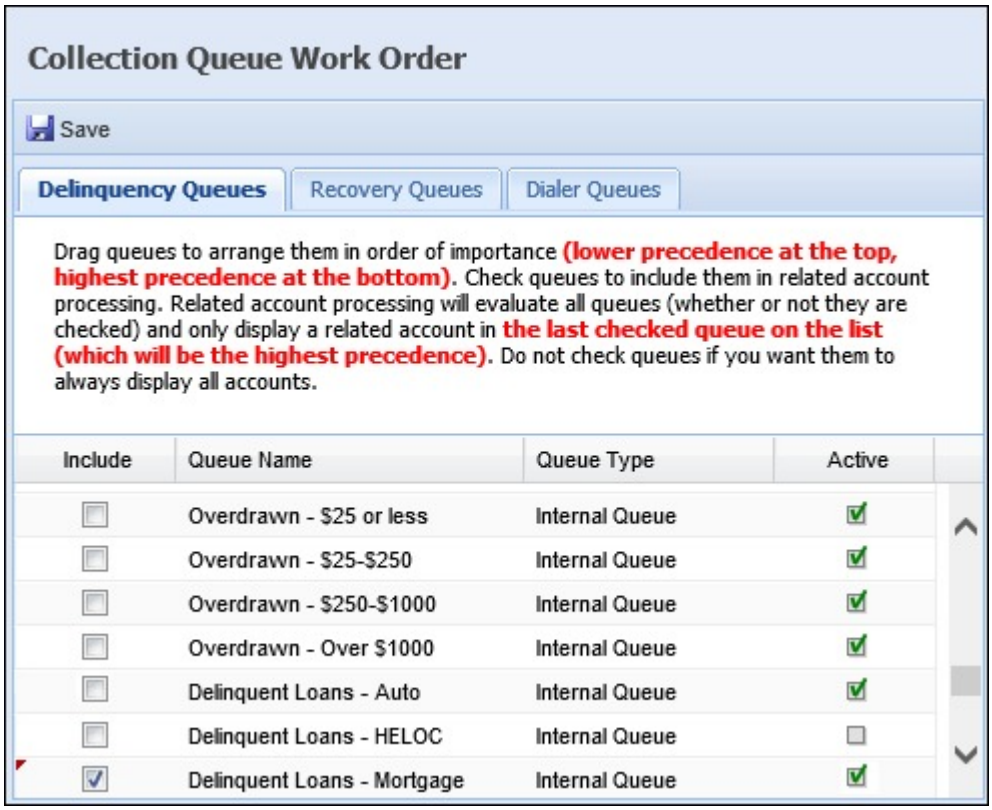
In this example, Joe's Mortgage account, account #1005678, is presented to the Mortgage collector, since the Delinquent Loans - Mortgage queue has been given highest precedence in the work order. Once the mortgage collector has worked Joe's mortgage account by running a workflow to deactivate the account in the Delinquent Loans - Mortgage queue, Joe's auto account, account #1001234, can then be worked by the mortgage collector.

> If the area is configured to require **All accounts in any queue** to be worked, the mortgage collector is required to work Joe's related account before getting the next account in the mortgage queue.
>
> For more information on Area configuration, please see the Areas topic within this guide.

If Joe's auto account is not worked by the mortgage collector, it is presented in the Delinquent Loans - Auto queue, but only after Joe's mortgage account has been worked in the Delinquent Loans - Mortgage queue.

Scenario 3- One queue included in the queue work order (highest precedence)

In this scenario, the Delinquent Loans - Mortgage queue is of highest precedence and the only queue included in the queue work order. The way in which Joe's accounts are presented may depend on the timing in which the queues are worked.



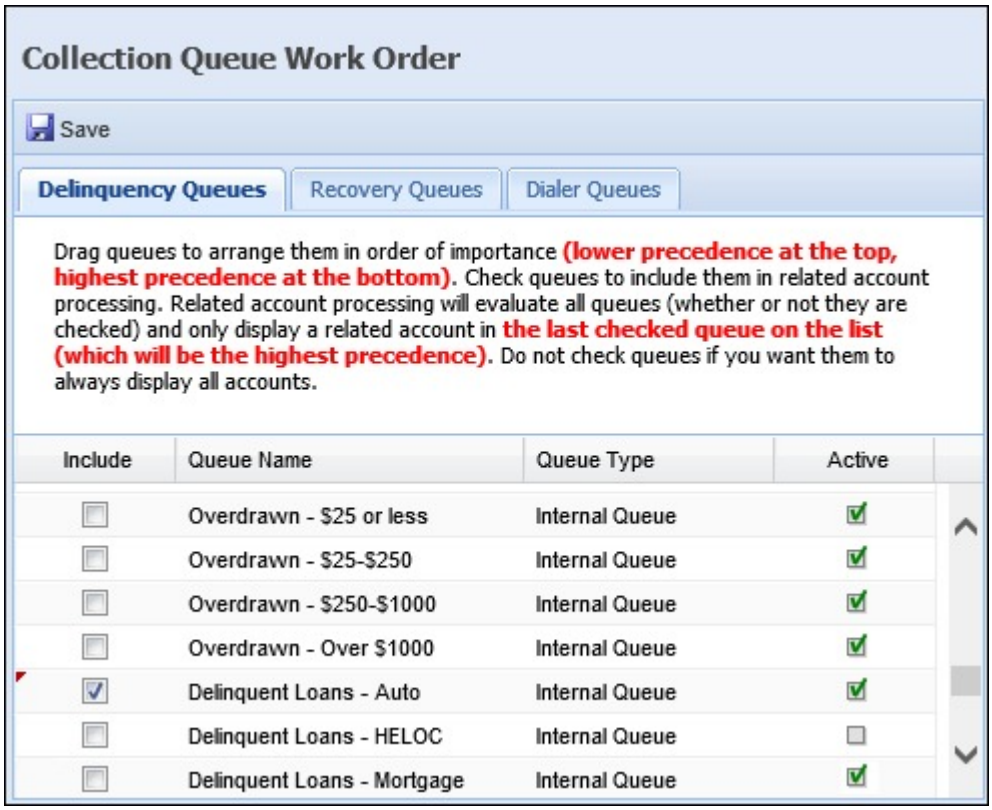
Reference the table below for an overview of these scenarios:

Scenario	Description
Delinquent Loans - Mortgage queue worked first	If the Delinquent Loans - Mortgage queue is worked before the Delinquent Loans - Auto queue, the mortgage collector is presented with Joe's mortgage account first. Once a workflow has been run to deactivate the mortgage account in the queue, the mortgage collector can then work Joe's auto account. The auto account does not present in the Delinquent Loans - Auto queue if it is worked by the Mortgage collector. If the auto account is not worked by the Mortgage collector, it is presented in the Delinquent Loans - Auto queue, but only after Joe's mortgage account has been worked in the Delinquent Loans - Mortgage queue.

Delinquent Loans - Auto queue worked first	If the Delinquent Loans – Auto queue is worked before the Delinquent Loans- Mortgage queue, then the auto collector is presented with Joe's auto account. Joe's mortgage account is presented in the Delinquent Loans - Mortgage queue since Related Accounts Processing does not occur for the Delinquent Loans - Auto queue. If the area is configured to require All accounts in any queue to be worked, the auto collector is required to work the mortgage account before getting the next account in the auto queue.
Both queues being worked at the same time	If the mortgage collector and the auto collector are working their respective queues at the same time, the order in which Joe's accounts appear in each queue determines the queue in which it is presented. If Joe's account appears higher in the Delinquent Loans - Mortgage queue than the Delinquent Loans - Auto queue, it is presented to the mortgage collector first and the above scenario for Delinquent Loans - Mortgage queue worked first applies. If Joe's account appears higher in the Delinquent Loans - Auto queue than the Delinquent Loans - Mortgage queue, it is presented to the auto collector first and the above scenario for Delinquent Loans - Auto queue worked first applies.

Scenario 4- One queue included in the queue work order (lower precedence)

In this scenario, the Delinquent Loans- Auto queue is the only queue that has been included in the queue work order. Though it is the only queue included, it holds a lower precedence than the mortgage queue since it is higher in the Collection Queue Work Order grid.



In this example, the mortgage collector is presented with Joe's mortgage account first, but after a workflow is run to deactivate the mortgage account in the queue, the mortgage collector is also able to work Joe's auto account.

> If the area is configured to require All accounts in any queue to be worked, the mortgage collector is required to work Joe's related account before getting the next account in the mortgage queue.

If Joe's auto account is not worked by the mortgage collector, it is presented in the Delinquent Loans - Auto queue, but only after Joe's mortgage account has been worked in the Delinquent Loans - Mortgage queue.

The table below provides an overview of the above scenarios and the expected behavior when Get Next is selected in the workspace:

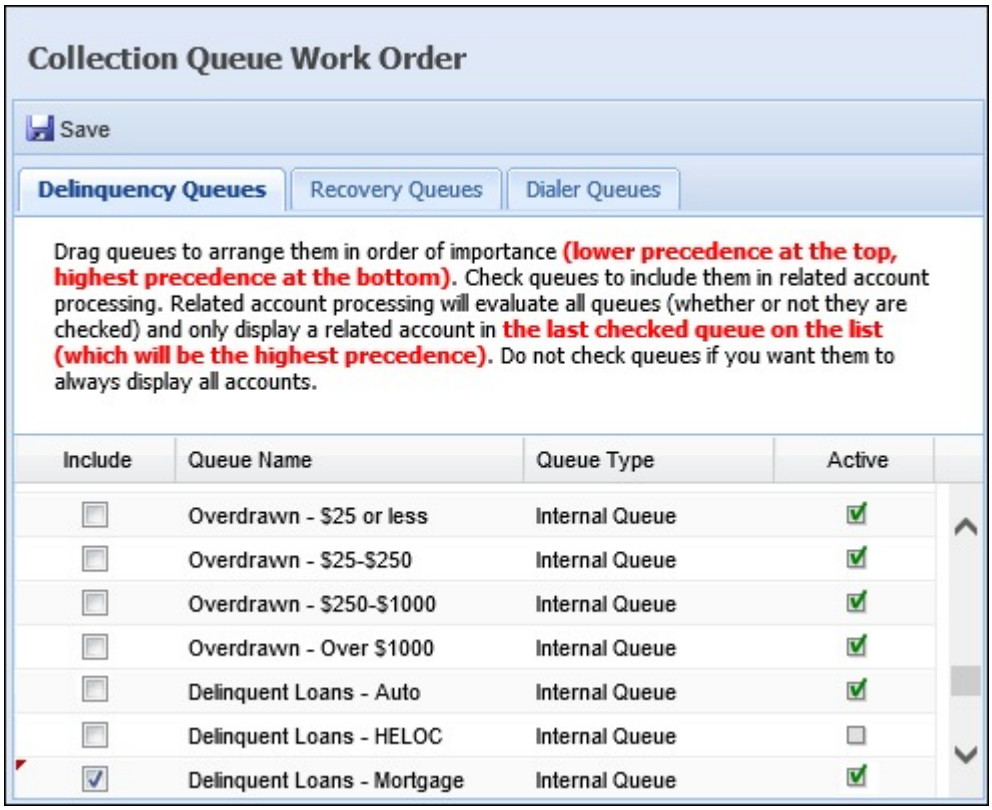
Queue Included		**Expected Behavior with Get Next**	
Delinquent Loans - Auto	**Delinquent Loans - Mortgage**	**Delinquent Loans - Auto**	**Delinquent Loans - Mortgage**
N	N	Workspace opened for Account #1001234 (Auto).	Workspace opened for Account #1005678 (Mortgage).

Y	Y	If account 1001234 is not worked in the Delinquent Loans - Mortgage queue, it is presented in the auto queue **after** account 1005678 is worked by the Mortgage collector.	Workspace opened for account 1005678. After account 1005678 is worked, account 1001234 can be worked. If the area is configured to require all accounts in any queue to be worked, the mortgage collector is required to work the related account before getting the next account in the mortgage queue.
N	Y	The way in which Joe's accounts are presented may depend on the timing in which the queues are worked. Reference the table within Scenario 3 for more information.	
Y	N	If account 1001234 is not worked in the Delinquent Loans-Mortgage queue, it is presented in the auto queue after account 1005678 is worked by the Mortgage collector.	Workspace opened for account 1005678. After account 1005678 is worked, account 1001234 can be worked. If the area is configured to require all accounts in any queue to be worked, the mortgage collector is required to work the related account before getting the next account in the mortgage queue.

Defining Queue Work Order and Related Account Processing

The Collection Queue Work Order page lists all internal and dialer queues. The tabs that display may vary and are dependent upon the functionality enabled for the institution.

> The Recovery and Dialer tabs only display when the Recovery solution and/or Dialer functionality is enabled.



By default, Delinquency and Recovery queues are combined within one tab, but can be organized into separate tabs by selecting the Prevent account work ordering across queue classifications check box in System Management > Modules > Collection > Collection Settings.

The grid displayed within each tab on this page contains the following columns:

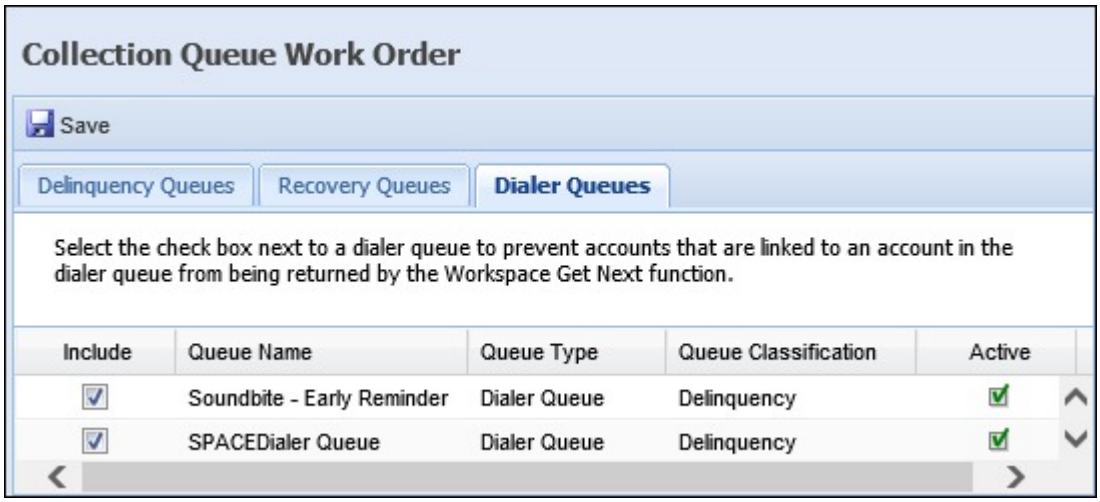
Column Name	Description
Include	Check the **Include** option to enable the queue work order. When Include is checked, related accounts processing occurs and accounts are returned according to the queue precedence defined on this page. Leave the Include check box blank to have all accounts within a queue returned with Get Next.
Queue Name	Displays the name of the Collections Queue.
Queue Type	Displays the type of Collections Queue, such as Internal or Dialer.
Queue Classification	Displays the queue's classification of either Delinquency or Recovery. If the Recovery module is not active, Recovery queues do not display.
Active	If checked, the queue is active in Temenos Infinity. Queue Work Order can only be defined for active queues.

Dialer Queues

If dialer functionality is enabled, the Dialer Queues tab lists all active dialer queues in alphabetical order. Dialer

Queue Work Order is controlled by the Dialer Setting configured for the Dialer Queue in System Management > Collection > Collection Queues regardless of the work order defined within this tab.

For more information on Dialer Settings, please see the Collection Queues topic within this guide.



Reference the Get Next diagram above for an overview of how accounts related to an account in a Dialer Queue are evaluated and returned with the workspace Get Next functionality.

Editing a Queue Work Order

To edit the queue work order, click and hold a queue from the list. Drag and drop the queue to arrange it in the desired work order. To include a queue in the queue work order and enable related accounts processing, select the Include check box next to the queue.

> Queues at the bottom of the list take higher precedence than queues at the top of the list.

Once all configurations for Queue Work Order have been made, click

A success message appears showing the changes were saved successfully. Click **OK** to close the message and return to the Collection Queue Work Order page.

> Changes made to the queue work order are not implemented in the Get Next process until the initialize process runs the following day.

Queue Analyzer

The Queue Analyzer was developed by Temenos to provide both administrators and end users with the ability to find out on their own why an account is not in its “expected” queue, as well as why an account is in a queue but is not presented to be worked.

> The Queue Analyzer is only available for Collections and Recovery Queues, and is not available when Advanced Queuing is active.

In order to understand how the Queue Analyzer functions, it is helpful to know how the Queue Refresh and Get Next process work.

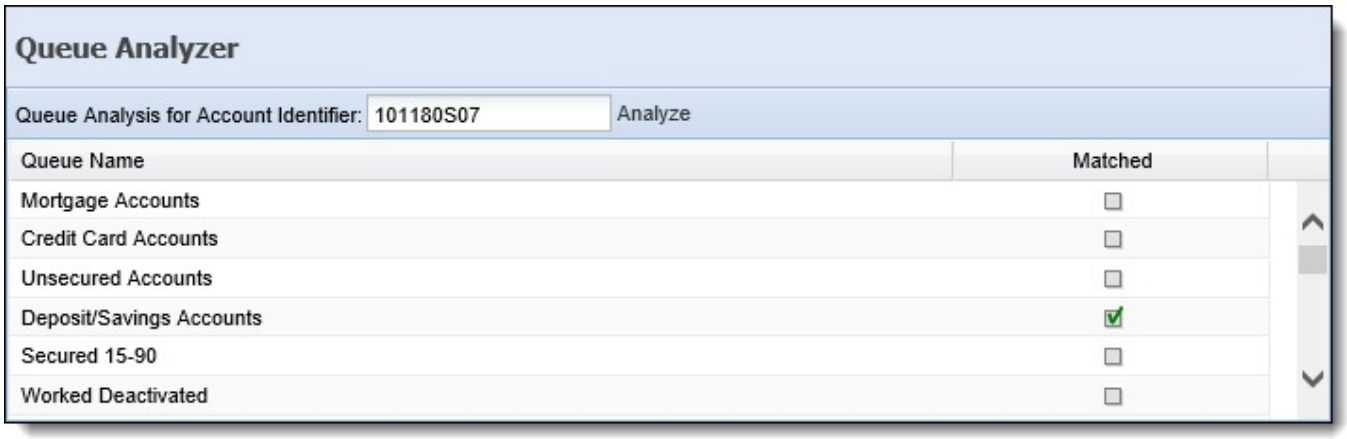
When the Queue Refresh runs, the system takes all accounts that are eligible to be queued (which is every account in the database that has not been assigned to a queue) and begins populating queues based on the Queue Refresh Order. All accounts that meet the criteria for the first queue in the Queue Refresh Order list goes into that queue, even if criteria for other queues further down in the list is met.

When a user clicks **Get Next** from the workspace while working a queue, the system performs a number of checks to determine which account is going to be presented to be worked:

What account should be next based on Sorting?	
Is a related account for this account in a Dialer Queue?	If Yes, the account is skipped (based on configuration). Any accounts related to the skipped account, regardless of whether they are in the same queue, are not skipped.
Does the account meet Next Contact Date rules from the queue?	If No, the account is skipped.
Does the account have a related account in a queue included in the Queue Work Order?	If Yes, and the queue that the related account is assigned to has a higher priority in the Work Order, the account is skipped.
Is the current time within the defined Collection Hours for the home state of the member?	If No, the account is skipped.
Has a workflow been started or completed for this account?	If No, the account is skipped.

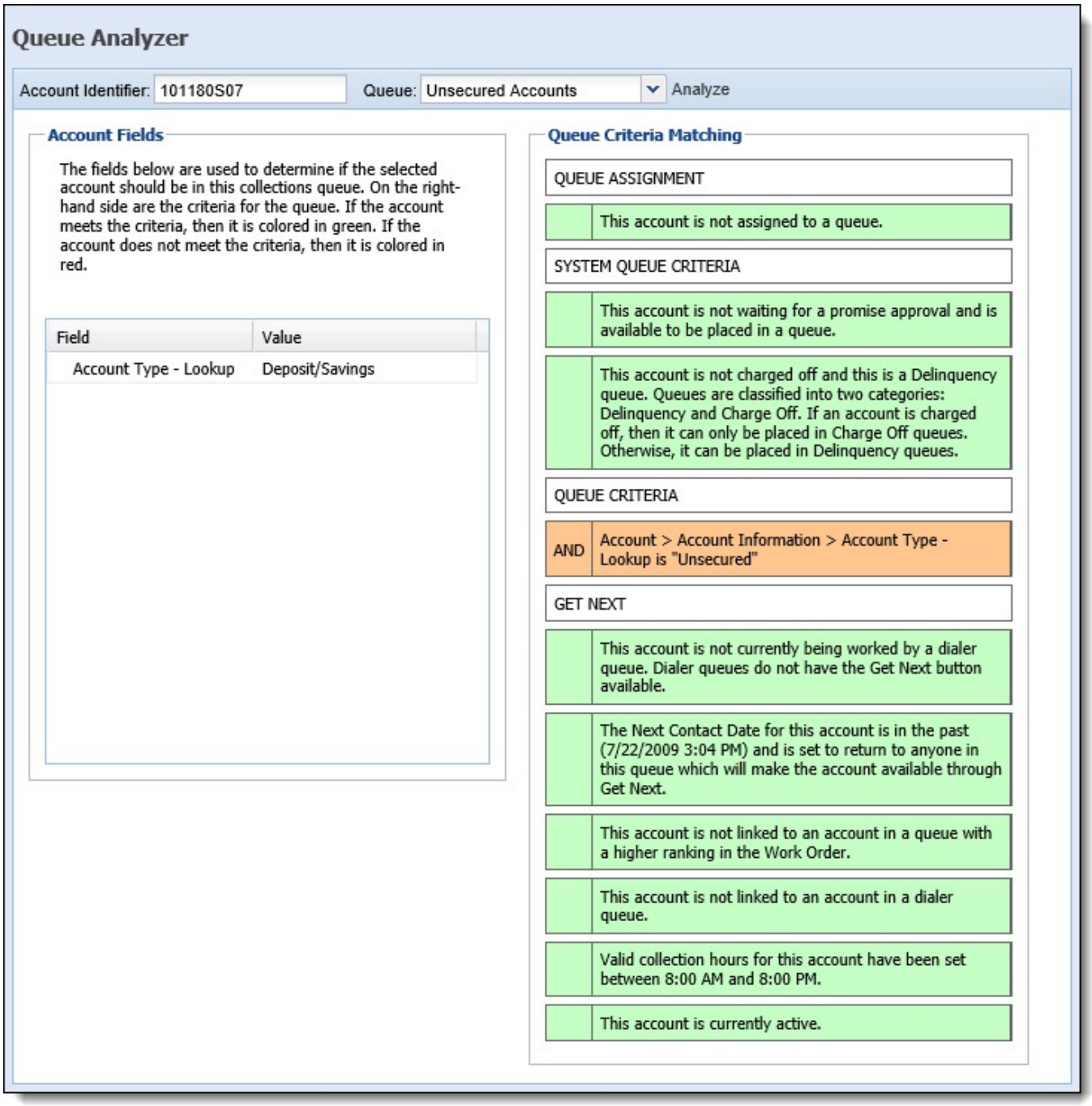
Analyzing an Account

Analyze an account directly from the workspace by clicking the **Tools** drop down in the workspace toolbar and selecting Queue Analyzer. A new window opens.



Based on the Queue Analysis for this account, the criteria on the account makes it eligible for placement in both the Mortgage 1-15 Day DQ queue and the Specialty - Bankruptcy queue. The account is presented in the Auto 60-89 Days DQ queue because the Auto queue is higher than the Bankruptcy queue in the Precedence/Queue Refresh order.

Double-clicking on any queue that is not checked in the “Matched” column shows the user exactly why the account was not placed in the queue. Both the criteria defined for the queue and the corresponding field values for the chosen account are displayed.

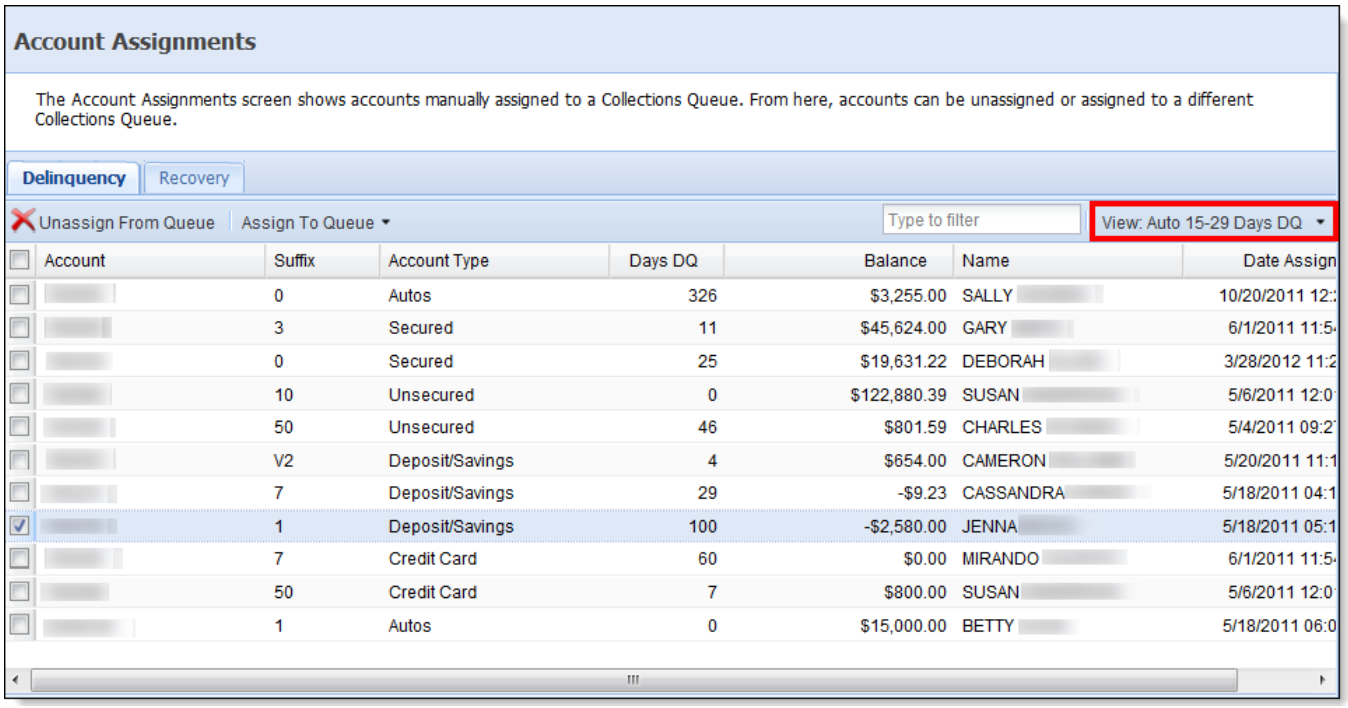


Green boxes identify where the criteria of the account matches the queue. Orange boxes identify where there are discrepancies that either prevent the account from being in the queue or prevent it from being presented via Get Next.

Account Assignments

The Account Assignments screen allows for the management of queue assignments. When a user runs the Account Assignment workflow step on an account to manually assign it to a Collections Queue, it populates on this screen. An account can be manually assigned to a queue for a particular collector to work or for a manager to review. Once worked or reviewed, the account can be unassigned from the queue via this page.

Using the views drop down highlighted below, Administrators can navigate through existing queues found within Temenos Infinity to view Accounts that were manually assigned to them.



The following columns display on the Account Assignments page:

Column Name	Description
Account	The Account Number assigned to the respective queue.
Suffix	Displays the suffix of the account.
Account Type	The Account Type of the listed account in the queue.
Days DQ	Denotes the amount of days the respective account is delinquent.
Balance	Displays the outstanding balance on the account.
Name	The Primary's name on the account.
Date Assigned	Denotes the date in which the account was manually assigned to that queue.

From this page administrators can assign, reassign, and remove queue assignments from accounts.

To re-assign a manually assigned account to a different collection queue

- Select a queue from the View drop-down to populate assigned accounts in that queue.
- Highlight one or multiple accounts and click the **Assign To Queue** drop-down to display a list of all active Collection queues.
- Select the queue to which an account is to be assigned.
- A Processing Queue message appears. If the account is assigned successfully to a queue, a success message appears.
- The account now displays in the queue to which it was assigned. Click the **View** drop-down and select that queue to view the account.

To un-assign accounts from queues

- Highlight one or more accounts, and click Unassign From Queue.
- A success message appears showing the account was unassigned successfully. Once removed, the account now follows the normal queue processing and queue logic built to fall into the appropriate queue.

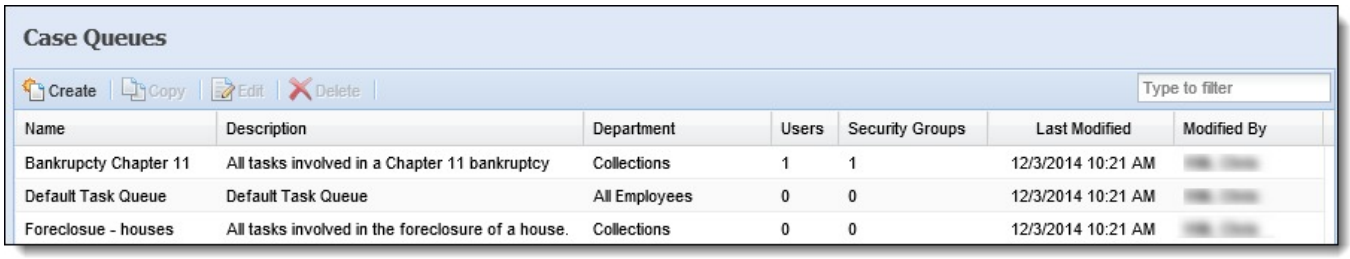
Case Queues

Case queues promote organization and management of service ticket tasks. Tasks are configured to be automatically assigned to a case queue when they are ready to be worked. Queuing facilitates:

- Specific tasks or functions to be worked by a specific group of resources through security settings.
- Management of aging tasks through the use of escalation.
- Visibility and management of tasks that are moved between resources before completion. The task queuing history is visible in a task's history tab in the workspace.

To access all case queues, navigate to System Management > Collection > Case Queues.

> While working a queue, the user works the first task in the queue to completion, then they are automatically directed to the remaining tasks in that ticket before getting the next task from the queue. Once all tasks within a single ticket that the user has access to are completed, the next task in the queue is retrieved.



The following columns display on the Case Queues page:

Column Name	Description
Name	The name of the Case Queue.
Description	The description of the Queue. This also appears to the end user accessing the queue.
Department	The department associated to the Case Queue.
Users	The number of users assigned to the Queue.
Security Groups	The number of security groups assigned to the Queue.
Last Modified	Denotes when the last modification was made to the Queue.
Modified By	Denotes who made the last modification to the Queue.

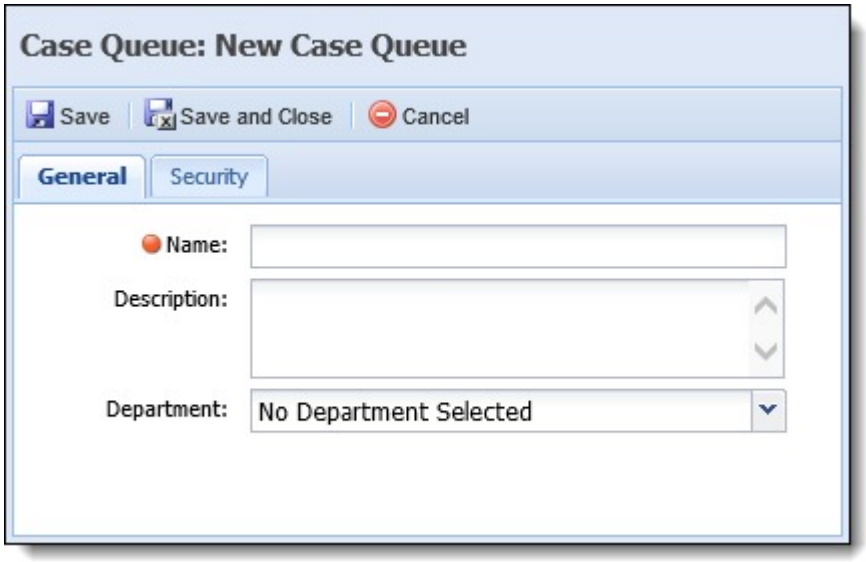
From the Case Queues page, administrators can create queues, copy queues, edit queues, and delete queues.

Queue Attributes

All case queues share common attributes that are defined while creating, copying, or editing a queue.

General

The general attributes include basic information pertaining to the case queue.

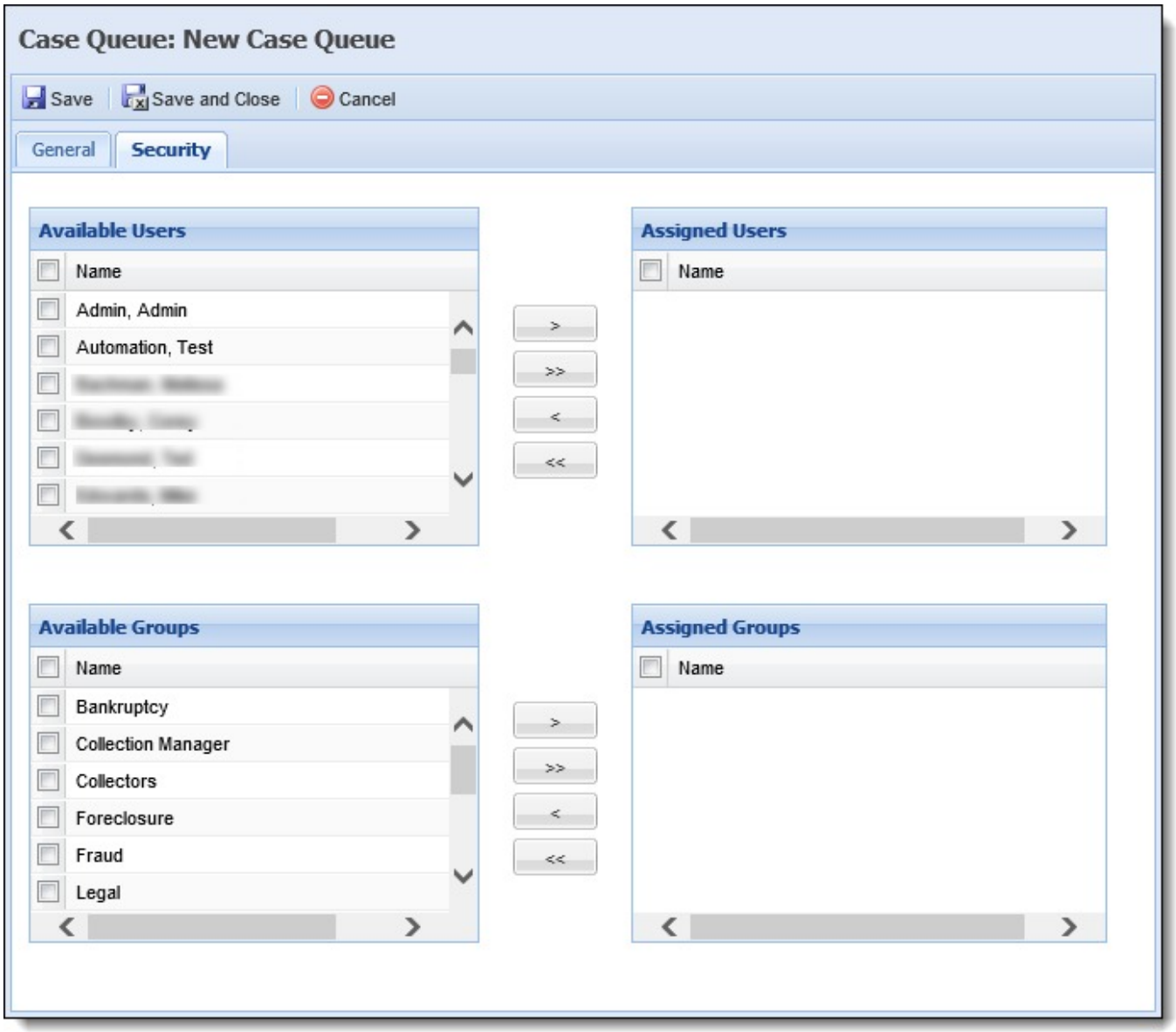


General attributes are located within the General Tab:

Attribute	Description
Name	Provide a unique name for the case queue. This is a required field.
Description	Provide details about the case queue. Although descriptions are not required, they appear within queues list to provide users with more detail when they work a case queue.
Department	Select a department from the drop-down; this is used for SLA reporting. No Department is pre-populated.

Security

Security attributes allow administrators to control which users and groups have access to work a case queue.



Security attributes are located within the Security Tab:

Attribute	Description
Assign Users	Select users from the Available Users list and move them to the Assigned Users to provide users access to the case queue from the Queues icon in the Ribbon Bar.
Assign Groups	Select groups from the Available Groups list and move them to the Assigned Groups to provide groups access to the case queue.

For information about assigning a task to a queue during configuration an assigning escalation schedules. Please see the Case Tasks topic in this guide.

Creating a Queue

The Create function enables administrators to create a new case queue.

To create a new Case Queue, click .

The New Queue screen appears. Navigate through the General and Security tabs to update attributes.

When finished entering all the information, click Save and Close to create the new queue and return to the Case Queues page. The new case queue populates in the grid and can be worked by users with allocated permissions.

Copying a Queue

The Copy function enables administrators to copy an existing case queue. The copied queue can be used as the foundation for a new queue.

- Highlight the Case queue that is to be copied. Click Copy.
- The Copy Case Queue screen appears. Navigate through the tabs and make any necessary changes to the Case queue.
- When finished entering all the information, click Save and Close to save the new task queue and return to the Case Queues page. The new queue is now listed in the grid and available to be worked by users with appropriate permissions. Click Cancel to return without saving.

Editing a Queue

The Edit function enables administrators to edit an existing queue attributes.

- Highlight the queue that is to be edited. Click Edit.
- The Edit Queue Screen appears. Navigate through the tabs and make any necessary changes to the queue.
- When finished entering in all information, click Save and Close to save the queue and return to the Case Queues page. Click Cancel to return without saving.

Deleting a Queue

The Delete function enables administrators to remove an existing case queue.

- Highlight the queue that is to be deleted. Click Delete.
- A confirmation message appears.
- Click **Yes** to delete the task queue. Click **No** to return to the Case Queues page without deleting.

> Task Queues that have tasks still remaining in them cannot be deleted. Task Queues that also have a Case Type assigned to it cannot be deleted. Error messages appear if an attempt is made to delete a Task Queue with these features assigned to it.

Workflow Queues

The Workflow Queues page in System Management (System Management > Workflows > Workflow Queues) allows administrators to manage all workflow queues in Temenos Infinity. Workflow Queues are typically used for management approval or to route tasks from one department to the next. This functionality acts as a “mailbox” for workflows.

Workflow Queues

Create | Copy | Edit | Delete

Name	Description	Users	Security Groups	Last Modified	Modified By
Bankruptcy	Tasks associated with the bankruptcy process	0	1	[illegible]	Admin, Admin
Collections	Tasks associated with the collection process	0	2	[illegible]	Admin, Admin
Collections Management	Tasks associated with the collection process from a Management perspective (i.e.: approvals, etc.)	0	1	[illegible]	Admin, Admin
Foreclosure	Tasks associated with the foreclosure process	0	1	[illegible]	Admin, Admin
Foreclosure Approval	Tasks associated with the foreclosure process	0	2	[illegible]	Admin, Admin
Fraud	Tasks associated with the fraud process	0	1	[illegible]	Admin, Admin
Legal	Tasks associated with the legal process	0	1	[illegible]	Admin, Admin
Recovery	Tasks assoicated with the recovery process	0	2	[illegible]	Admin, Admin
Recovery Management	Tasks assoicated with the recovery process from a Management perspective	0	2	[illegible]	Admin, Admin
Repossession	Tasks associated with the repossession process	0	1	[illegible]	Admin, Admin
Repossession Approval	Used to approve any requested repossessions	0	2	[illegible]	Admin, Admin
Skip Trace Dept	Perform skip traces on members	0	1	[illegible]	Admin, Admin

When workflows are sent to workflow queues, accounts do not fall out of their respective collection queues. Only the workflow is sent to the workflow queue. Workflow Queues can also be tracked using workflow queue web parts in dashboards. For more information on this, refer to the Dashboards section of this guide.

The following columns display on the Workflow Queues page:

Column Name	Description
Name	Name of the workflow queue.
Description	Description of the workflow queue.
Users	The number of users assigned to the workflow queue.
Security Groups	The number of security groups assigned to the workflow queue.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification.

From the Workflow Queues page, administrators can create workflow queues, copy existing workflow queues, edit existing workflow queues, and delete workflow queues.

Creating a Workflow Queue

- Click **Create**. The New Workflow Queue screen appears.
- The New Workflow Queue screen contains 2 tabs: General and Security.
- Within the General tab, provide a name and a description for the new workflow queue. The Name is a required field.

Workflow Queue: New Workflow Queue

Save | Save and Close | Cancel

General | Security

Name:

Description:

- Within the Security tab, assign individual users and/or groups to have access to the workflow queue. If a user has access, they are able to access the workflow queue from the ribbon.
- When finished entering the information, click **Save** or **Save and Close** to save the workflow queue and return to the Workflow Queues page. The new workflow queue populates in the list and is available to users and/or groups who were assigned to the queue. Click **Cancel** to return to the Workflow Queues screen without saving.

Upon saving the new queue, it is available to assign workflow steps to when building a workflow, if the workflow step has the queuing tab enabled. If the user has permissions to the Workflow queue, the user has the ability to go to the next step and continue working the workflow. If the user does not have permissions, they are prompted with a message indicating the next step is assigned to someone else.

> If a workflow is sent to a workflow queue for a manager to approve, the account is still presented to the user the next day even if the manager has not yet completed the workflow step. Insert a Next Contact Date workflow step prior to the workflow step that goes to the workflow queue to prevent the account from being presented in the queue until the Next Contact Date.

Copying a Workflow Queue

- Click to highlight the workflow queue that is to be copied.
- Click **Copy**.
- The Copy Workflow Queue screen appears. If necessary, make any changes to the workflow queue.
- When finished making changes click **Save** or **Save and Close** to save the workflow queue and return to the Workflow Queues page. The new workflow queue populates in the list and is available to users and/or groups who were assigned to the queue. Click **Cancel** to return to the Workflow Queues page without saving. The new queue is also available to assign workflow steps to when building a workflow if the workflow step has the queuing tab enabled.

Editing a Workflow Queue

- Click to highlight the workflow queue that is to be edited.
- Click **Edit.**
- The Edit Workflow Queue screen appears. Make any necessary changes to the workflow queue.
- When finished making changes click **Save** or **Save and Close** to save the workflow queue and return to the Workflow Queues page. Click **Cancel** to return to the Workflow Queues page without saving.

Deleting a Workflow Queue

- Click to highlight the workflow queue that is to be deleted.
- Click **Delete.**
- A confirmation message appears. Click **Yes** to delete the workflow queue. Click **No** to not delete the workflow queue and return to the Workflow Queues page.

Views Administration

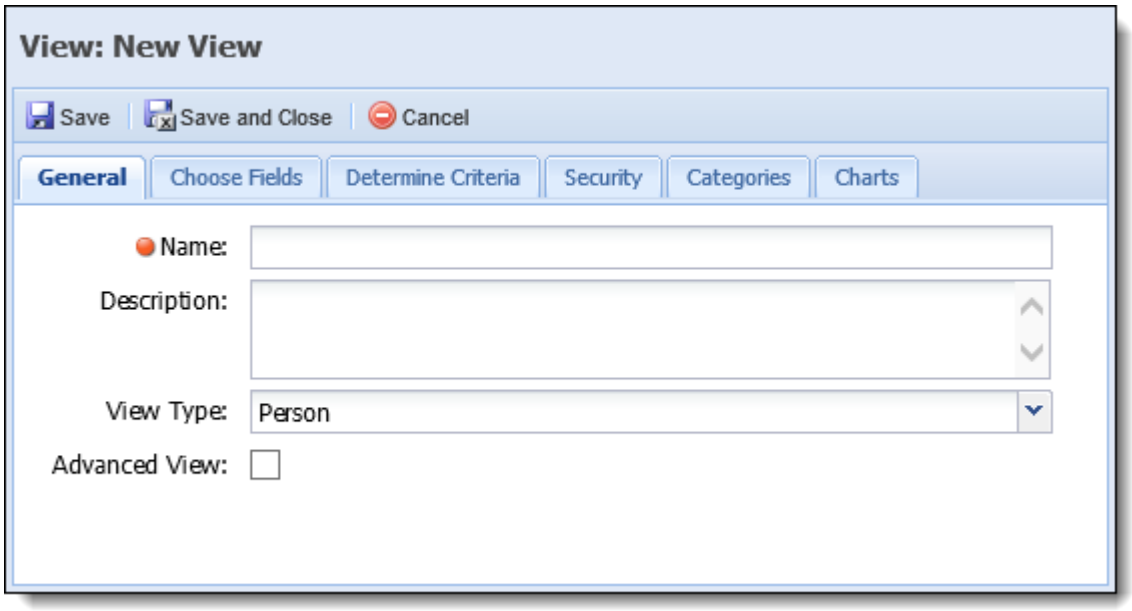
Views are used to group similar persons, accounts, and casesfor end users to view and work. They can serve as ad-hoc queues, and supply users with another route to get to the desired information.

Clicking in the Ribbon bar opens the Views page. From this page, administrators are able to create, copy, edit, and delete views.

View Attributes

All views share common attributes that are defined while creating, copying, and editing a view.

General



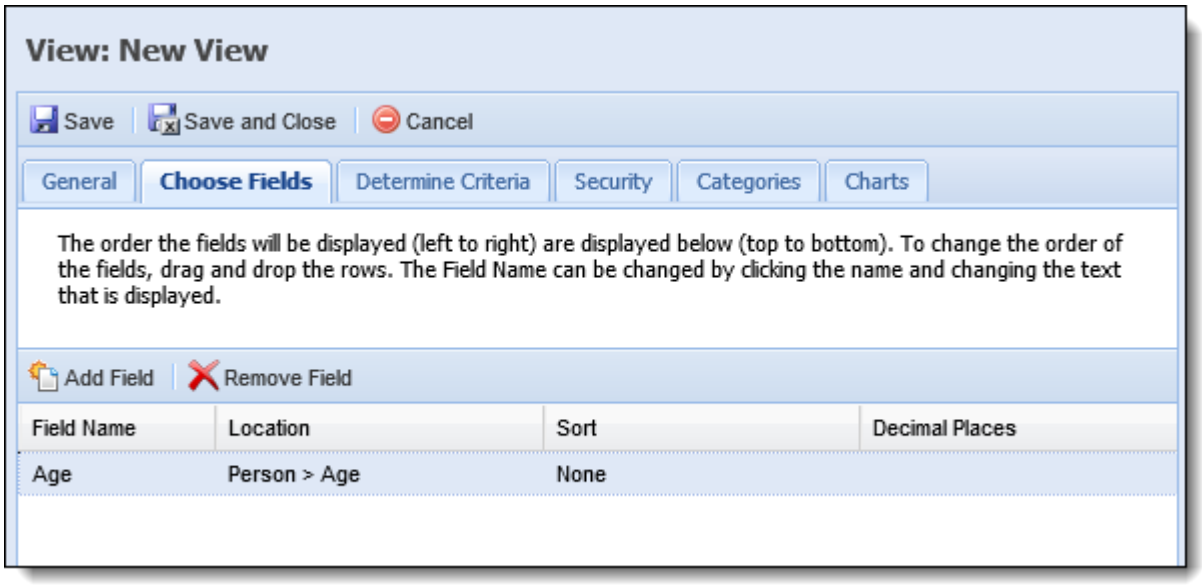
General attributes are located on the General tab:

Attribute	Description
Name	Enter a name for the new view in the name field. This is a required field.
Description	If necessary, enter a description for the new view.

<table>
<tr><td>View Type</td><td>Select a View Type from the drop down. The type selected determines what fields are displayed within the Choose Fields tab and Determine Criteria tabs. The following view types are available for selection:
<table>
<tr><th>View Type</th><th>Description</th></tr>
<tr><td>Account</td><td>This view type includes fields specific to accounts.</td></tr>
<tr><td>Case</td><td>This view type includes fields specific to cases.</td></tr>
<tr><td>Expense</td><td>This view type includes expense level fields that are populated from the Expenses screen.</td></tr>
<tr><td>Payment</td><td>This view type includes fields that are included in daily payment imports.</td></tr>
<tr><td>Person</td><td>This view type includes fields specific to persons.</td></tr>
<tr><td>User</td><td>This view type includes fields that relate to user activity.
If desired, system administrators can use this view type to create a view of active users at the institution, which can then be exported to Excel, and used to automatically populate connector credentials for each user in Temenos Infinity. For more information on this functionality, please see the Credentials section of the Users topic in this guide.</td></tr>
<tr><td>Workflow Archive</td><td>This view type includes fields that relate to work that is being performed within the system.</td></tr>
<tr><td>Workflow/Comment</td><td>This view type includes fields that relate to work that is being performed within the system with the addition of comment related fields.</td></tr>
</table>
</td></tr>
<tr><td>Advanced View</td><td>Select the Advanced View check box to build an advanced view. Advanced views allow for 2 or more view types to be displayed within a view. Selecting this option disables the Determine Criteria tab.
Advanced Views require a custom procedure to be built and added to the Temenos database. If interested in utilizing this functionality, contact a Temenos Customer Care Representative.</td></tr>
</table>

Fields

Field attributes enable administrators to select the fields that display in the view.



The following Field attributes are located in the Choose Fields tab:

Field Attribute	Description
Field Name	Displays the Field Names included in the view.
Location	Displays the location of the Field within the Field List.
Sort	Allows administrators to sort the Field data in ascending or descending order.
Decimal Places	Allows administrators to set the length of decimal places a field displays. This is only available for fields with numerical data.

System administrators can use the Add Field and Remove Field buttons to determine which fields appear in the view.

After fields have been added to the view, the order can be rearranged by clicking and dragging fields to their desired position.

> The order that the fields display in this tab (top to bottom) is the order that they appear from left to right within the view.

Users can also change the display of any field by clicking in the Field Name column, or setup default sorting by selecting the field in the Sort column.

Field Tips

Prior to adding fields to a view, it is recommended to review the following to ensure the expected data populates in the view:

- If the Workflow/Comment Report View Type is selected on the General tab, an Account folder and a Person folder display in the field list, both containing person information. The fields in the Person folder pertain to the person on which the workflow is run. Because a workflow/comment is always tied to a person, and may be tied to one or more accounts and/or a case, the View may display multiple rows for the same workflow/comment depending on the combination of Account, Person and Case fields chosen.
- Adding fields from any of the "All" folders in the Field List, such as All Persons for an Account type report,

could produce multiple records for an account when a view is generated. For example, if fields from the Application > All Persons > Addresses > folder are included in the view, and the primary account holder has three addresses, three separate records populate in the view; one for each address. If there is a joint on the account, separate records also populate in the view for each address listed for the joint.

- If it is desired to produce one line of data for each account in the view, use the view Criteria to filter data for a specific address type, or role, or use fields from specific folders in the Field List in place of the "All" fields. For example, use fields from the Primary or Secondary folders, rather than All Persons.

Reference the following section for an overview of the Field List:
Field List

The field list is a feature used throughout Temenos Infinity to define the fields to display on reports, views, and exports. It is also used in criteria building for reports, views, exports, and searches.

Each field selector window looks the same regardless of how it is accessed. In the below example, the field selector has been accessed through the Fields tab when creating a new report.

By default, the field selector opens in a tree format with expandable folders and sub-folders.

Field Tree

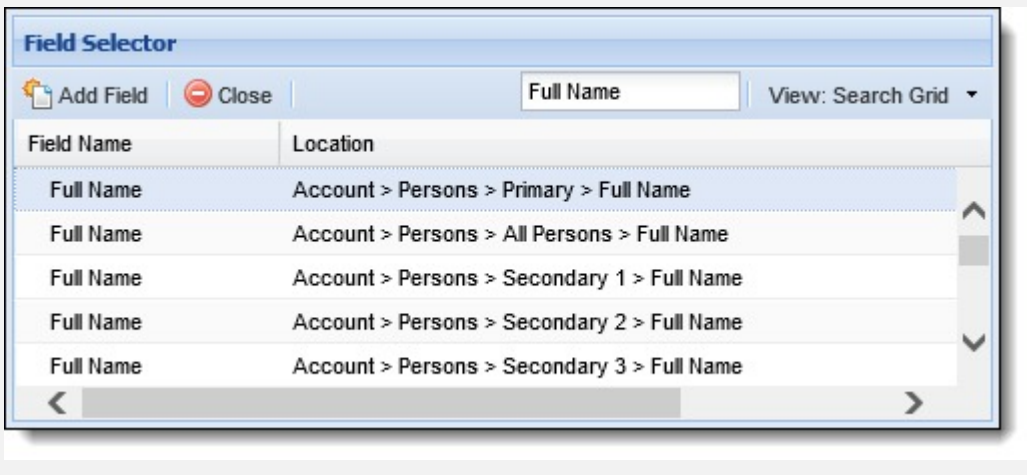
When using the Field Tree format, click the arrow next to the field name to expand or collapse the list of available fields. Expand each section until the desired field is found, or search for the field by entering text into the search text box, and hitting **Enter** on the keyboard.

Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

Search Grid

To change the view of the field selector from a tree to a search grid format, click the **View** drop-down in the top of the field selector window, and select **Search Grid**.

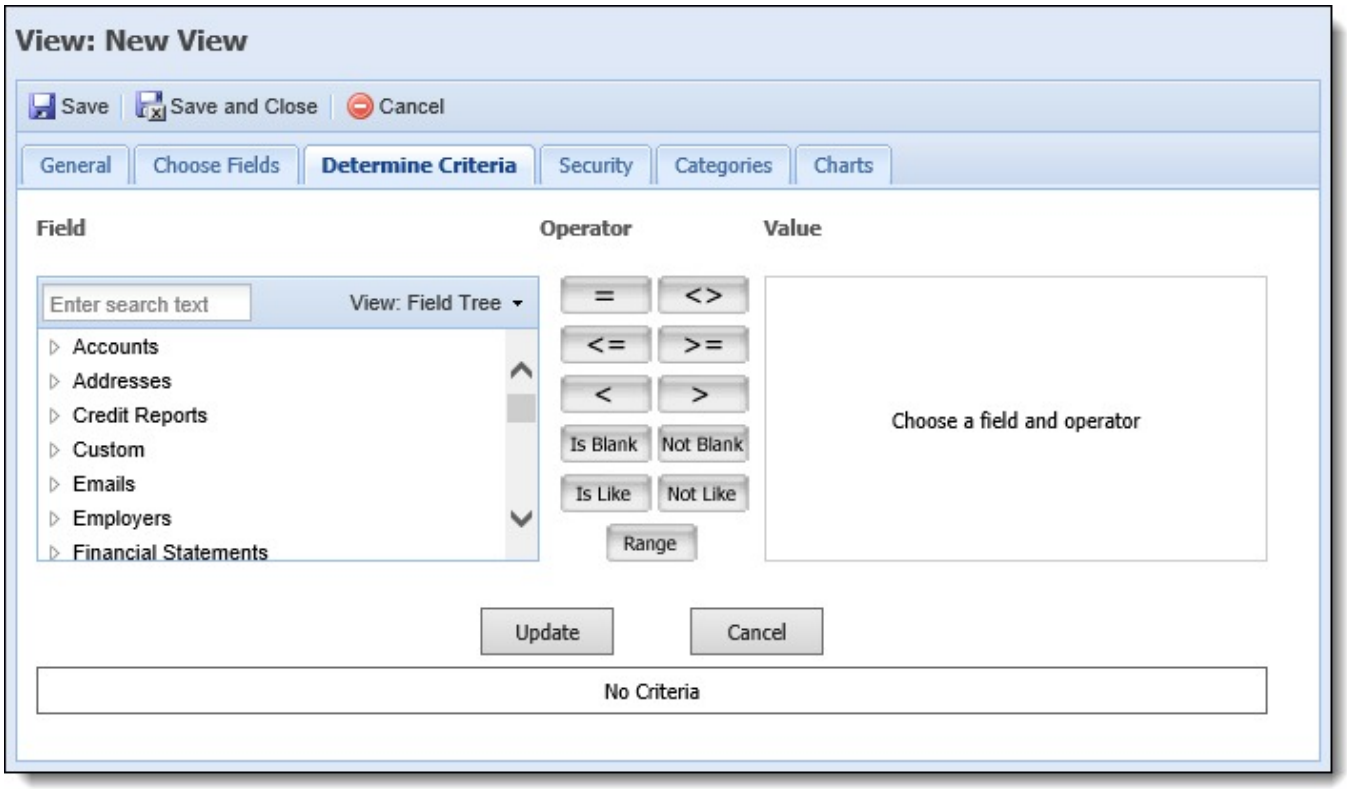
Using the Search functionality, locate the desired field by entering text into the text box, and hitting **Enter** on the keyboard. A list of results displays including the field name and location in Temenos Infinity.



> Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

Criteria

Criteria attributes are located on the Determine Criteria tab.

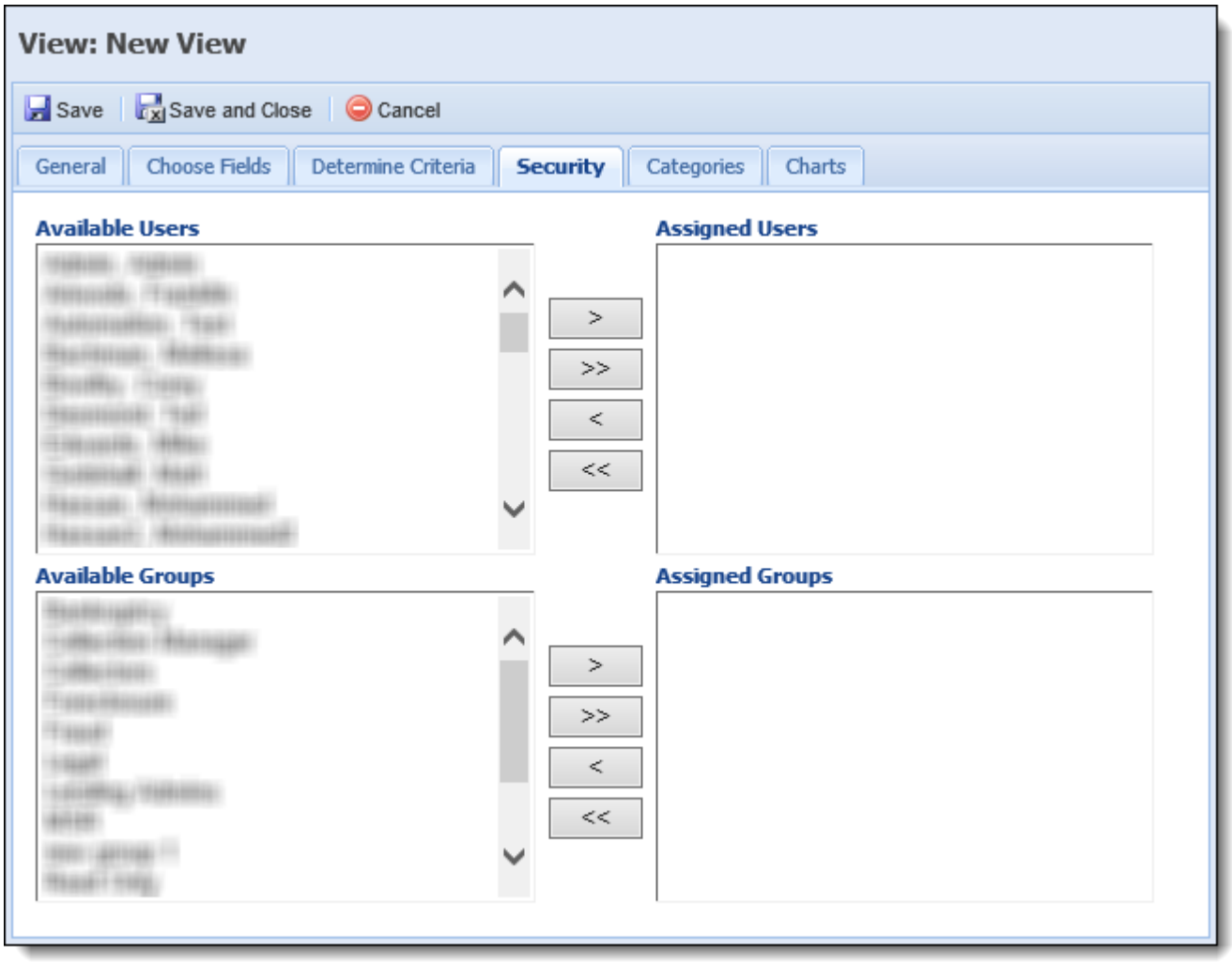


Use the criteria builder to specify what the system is to display in the view. For more information on the Criteria Builder, see the Criteria Builder help section within the User Guide.

Security

Security attributes provide the ability to assign specific users and/or security groups access to the view.

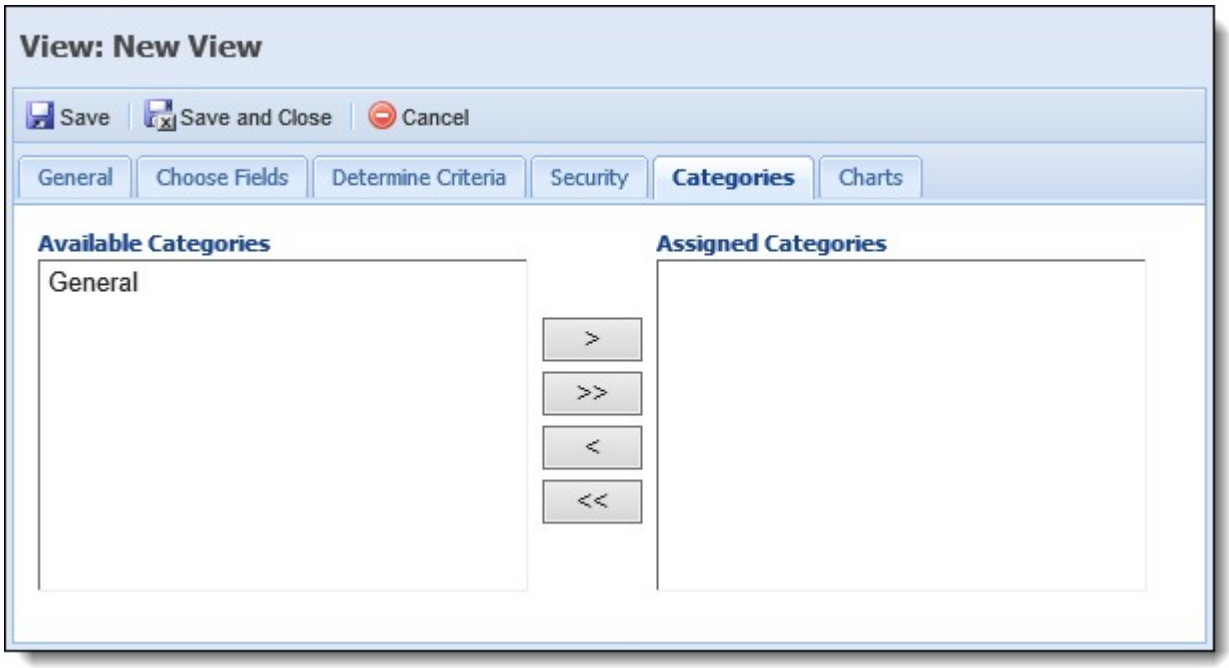
> In addition to being assigned to the view within this tab, the user or security group must also be granted View or Change access to the Workspace permission in order for workspaces to be opened from the view in the Ribbon Bar. This permission is set under the Collection category of the Permissions tab in System Management > Users, or System Management > Groups > Security Groups. For more information, please see the Users or Security Groups topic in this guide.



The following attributes are located on the Security tab:

Attribute	Description
Assign Users	Select users from the Available Users list and move them to Assigned Users to provide users access to the view.
Assign Groups	Select groups from the Available Groups list and move them to Assigned Groups to provide groups access to the view.

Categories

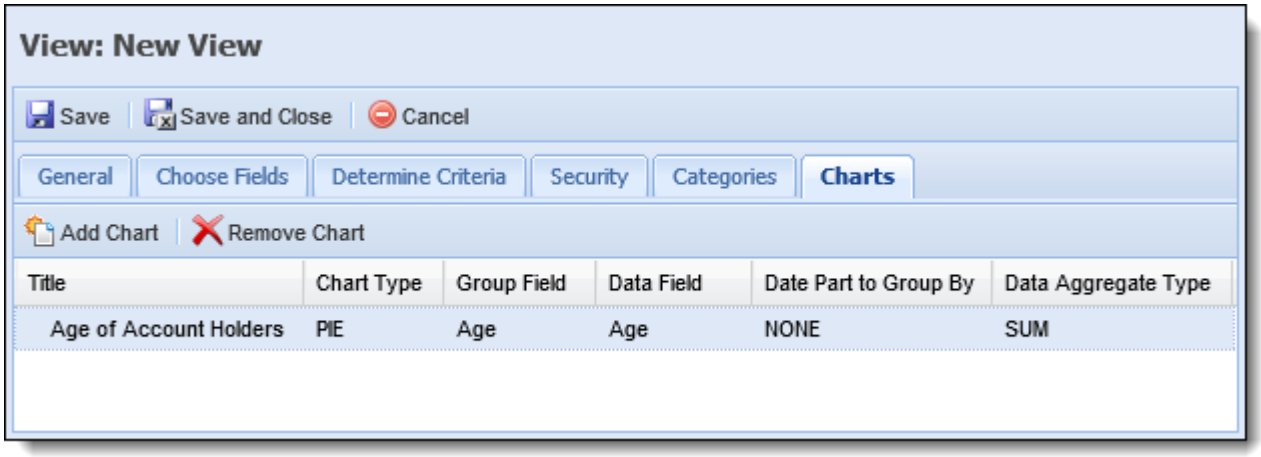


The categories attribute is located on the Categories tab:

Attribute	Description
Assign Categories	Select categories from the Available Categories list and move them to Assigned Categories to provide users access to the view.

Charts

Charts can be built to reflect the data populated in the view.



The chart attributes that are displayed on the Charts tab are defined when a chart is added.

To add a chart, click **Add Chart**. The Add Chart screen appears.

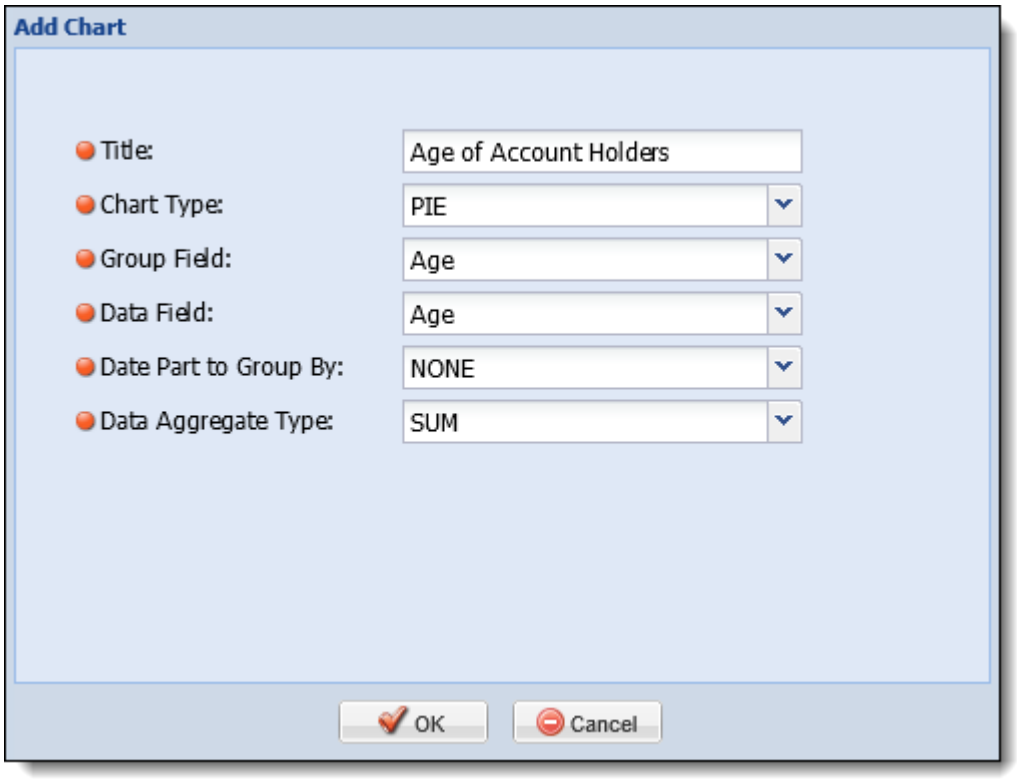


Chart Attribute	Description
Title	Provide a title for the chart.
Chart Type	Select the type of chart from the drop-down.
Group Field	Select the Group Field. This is how the data is grouped when the chart is displayed
Data Field	Select the Data Field. This is the variable that is measured within the grouping.
Date Part to Group By	If a date field is selected in the Group Field, select how the dates are to be grouped such as Day, Month or Year.
Data Aggregate Type	Select the aggregate type to calculate the data. This is dependent on which Group Field is selected.

When finished, click **OK**. The chart appears within the Charts tab. To edit information on the chart, click within the columns and make any changes.

> Charts built in this tab are available to view as a part of a Dashboard using the Charting Web Part. For more information on how to view this chart, see the Web Parts section within the Dashboard features in the User Guide.

View Actions

Within the Views page, administrators are able to perform the following actions:

- Create a View
- Copy a View
- Edit a View
- Delete a View

Creating a View

To create a new view:

- Click Create within the top of the Views page.
- The New View screen appears.
- Navigate through the tabs, and assign the view attributes.
- When finished, click Save or Save and Close to save the new view, and return to the Views page.

Copying a View

To copy a view:

- Highlight the view to be copied within the grid on the Views page, and click Copy.
- The Copy View screen appears.
- Navigate through the tabs and make any necessary changes to the view.
- When finished, click Save or Save and Close to save the new view, and return to the Views page.

Editing a View

To edit a view:

- Highlight the view to be edited within the grid on the Views page, and click Edit.
- The Edit View screen appears.
- Navigate through the tabs and make any necessary changes to the view.
- When finished, click Save or Save and Close to save the view, and return to the Views page.

Deleting a View

To delete a view:

- Highlight the view to be removed, and click Delete.
- A confirmation message appears.
- Click **Yes** to delete the view, or click **No** to return to the Views page without deleting.

> For more information about running a view, please see the Views topic in the End User guide.

Dashboards Administration

Administrators can manage existing dashboards and create new ones from the Dashboards page.

Dashboards display information about queues, user performance, and applications. Dashboards are comprised of Web Parts that are predefined information boxes.

> Views and Reports can be added to dashboards through the View Web Part and the Reporting Services Web Part.

When a user logs into Temenos Infinity, the Home Dashboard automatically displays. This is the first dashboard that appears in the alphabetical list of dashboards assigned to the user.

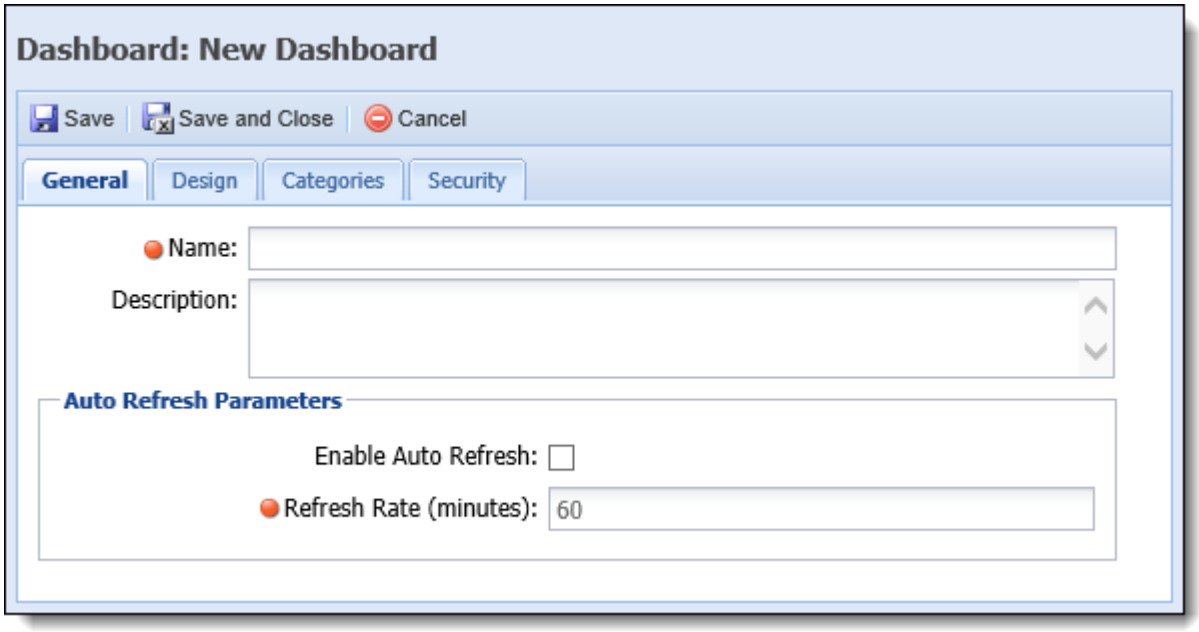
To access the Dashboard listing page click in the Ribbon Bar.

Dashboard Attributes

All dashboards have common attributes that are defined when creating, copying, or editing a dashboard.

General

The General dashboard attributes include the basic information about the dashboard.



The following General attributes are defined in the General tab:

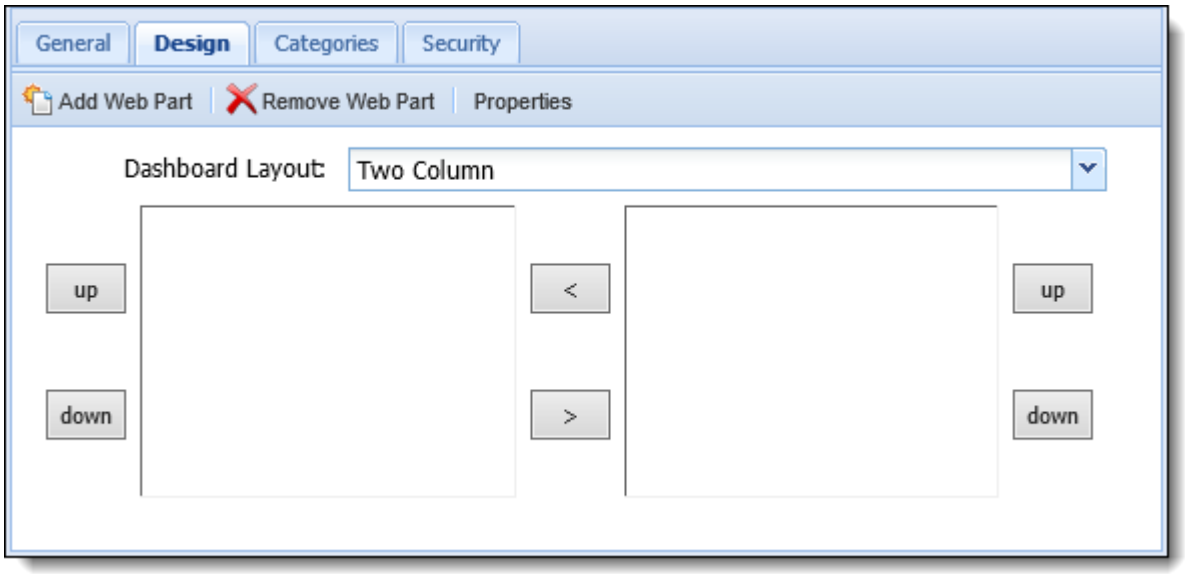
Attribute	Description
Name	Provide a unique name for the dashboard. This is a required field.
Description	Provide details about the dashboard. The description is visible to end users in the dashboards listing page.

In addition to these basic attributes, administrators are able to define the following parameters which identify how often the dashboard automatically refreshes:

Attribute	Description
Enable Auto Refresh	Select this check box to enable the automatic refresh functionality within the dashboard.
Refresh Rate (minutes)	Provide the dashboard's automatic refresh interval. If the Enable Auto Refresh parameter is selected, this field is required. By default, this value is set to 60 (minutes); however, the administrator may update this to suite their institution's business needs. The minimum value for this parameter is 5. There is not a maximum value for this parameter.

Design

Design attributes determine the layout of a dashboard.



The following Design attributes are defined on the Design tab:

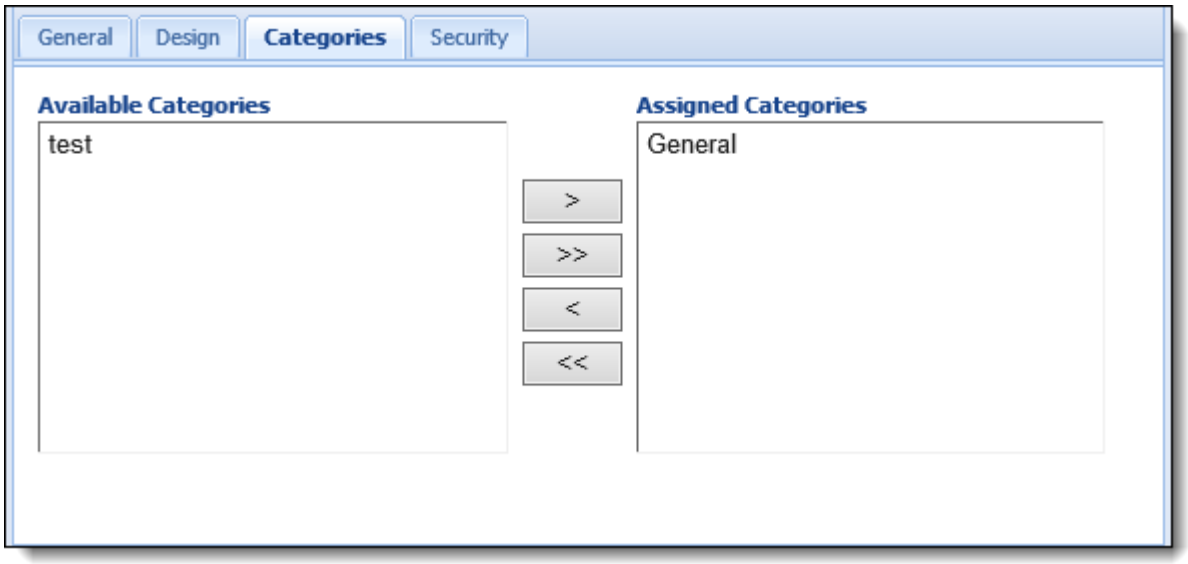
- Dashboard Layout
  - Determine if there are one or two columns in the dashboard by selecting the desired option from the drop-down.
- Web Part
  - Click Add Web Part to add a web part to the dashboard.
  - Select a web part from the list and click OK.
  - To adjust the properties of a web part, click **Properties**.

    > Not all web parts have properties associated to them. For web parts such as Views, Reports, Workflow Queue Detail,Case Detail, administrators need to click on **Properties** to choose what the view should display. If Properties need to be set on a web part and an attempt to save is made, a message appears indicating that properties must be set to continue.

  - When multiple web parts have been added to the dashboard, use the operators to configure the desired view.
- Operators
  - Highlight a web part and click **up** to move the web part up on the dashboard.
  - Highlight a web part and click **down** to move the web part down on the dashboard.
  - Highlight a web part and click **>** or **<** to move the web part to the right or left column on the dashboard.

Categories

The Categories tab provides administrators with the ability to assign the dashboard to specific categories.



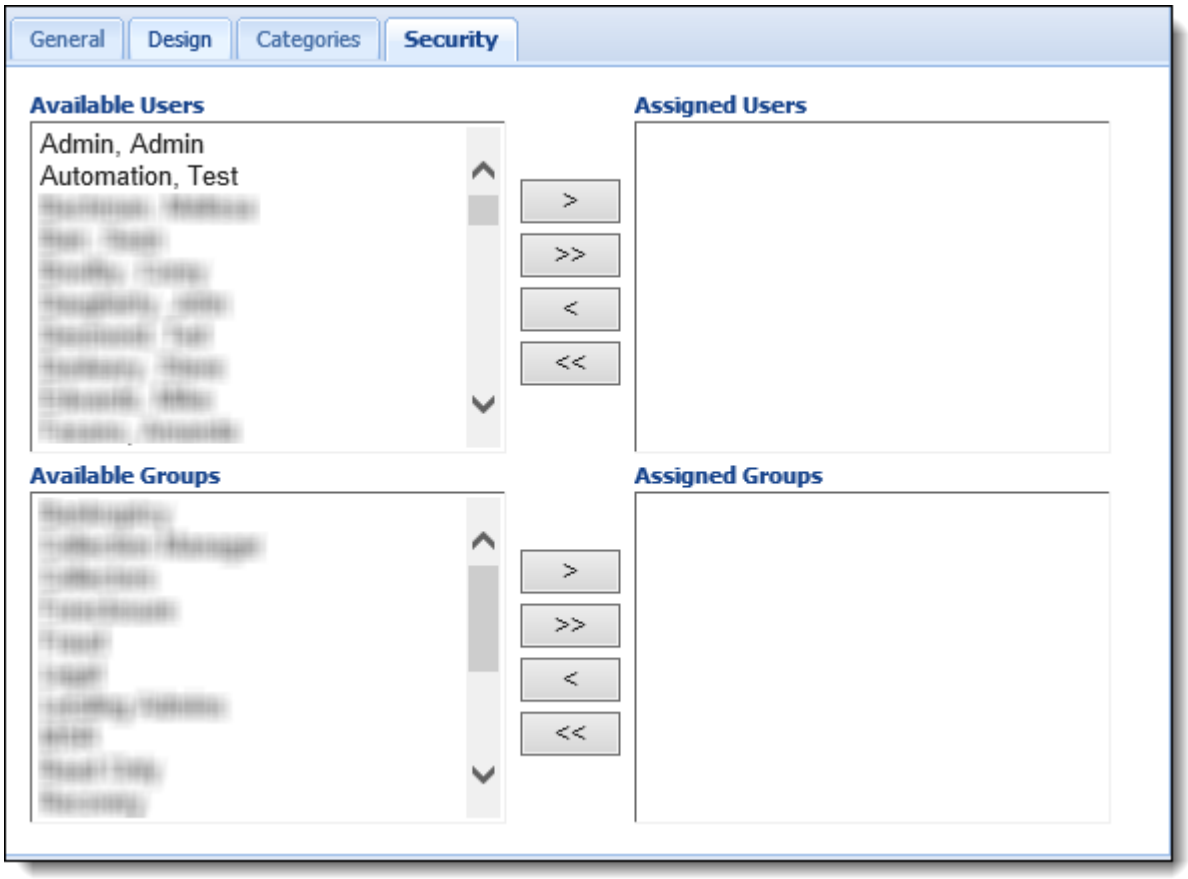
The following categories attribute is defined within the Categories tab:

Attribute	Description
Assign Categories	Select categories from the Available Categories list and move them to Assigned Categories to provide users access to the dashboard.

Security

Security attributes enable administrators to assign available Users and/or Groups access to the dashboard.

> In addition to being assigned to the dashboard within this tab, the user or security group must also be granted View or Change access to the Workspace permission in order for workspaces to be opened from the dashboard in the Ribbon Bar. This permission is set under the Collection category of the Permissions tab in System Management > Users, or System Management > Groups > Security Groups. For more information, please see the Users or Security Groups topic in this guide.



The following security attributes are defined in the Security tab:

Attribute	Description
Assign Users	Select users from the Available Users list and move them to Assigned Users to provide users access to the dashboard.
Assign Groups	Select groups from the Available Groups list and move them to Assigned Groups to provide groups access to the dashboard.

Creating a Dashboard

- To create a new dashboard, click Create.
- The New Dashboard screen appears.
- Navigate through the tabs and define all attributes for the dashboard.
- When finished, click Save and Close to create the new dashboard and return to the Dashboards page.

Copying a Dashboard

- Highlight the desired dashboard within the Dashboards grid and click Copy.
- The Copy Dashboard screen appears.
- Navigate through the tabs and make any necessary changes to the dashboard.
- When finished, click Save and Close to create the new dashboard and return to the Dashboards page.

Editing a Dashboard

- Double-click the desired dashboard within the Dashboards grid or highlight the dashboard and click Edit.

- The Edit Dashboard screen appears.
- Navigate through the tabs and make any necessary changes to the dashboard.
- When finished, click Save and Close to retain the dashboard modifications and return to the Dashboards page.

Deleting a Dashboard

- Highlight the desired dashboard within the Dashboards grid and click Delete.
- A confirmation message appears. Click **Yes** to delete the Dashboard. Click **No** to return to the Dashboards page without deleting.

Web Parts

Dashboards are made up of different web parts. This section provides a list of the web parts available in Temenos Infinity.

> The ability for users to create and customize dashboards is at the discretion of the System Administrator.

Name of Web Part	Description
Case Detail	Provides a listing of all cases for a selected case type. The case type that is displayed is defined in the web part's properties. This web part displays the Case Number, Case Title, and Case Type.
Case Summary	Provides a listing of all case types and the number of cases associated to each case type.
Charting	Displays a chart that was built within a view. Users are also able to run the view for which the chart was designed by clicking on the web part. The chart that displays is configured within the web part's properties.
Collection Queue Summary	Provides a summary of statistics related to collection queues. The web part displays the Queue Name, number of users, DQ Amount, Total Balance, number of Accounts, number of Worked Accounts, number of Worked Persons, Accounts Not Worked, Persons Not Worked, and Percent Worked. > The web part displays all queues to which the current user is assigned. All queues, regardless of who they are assigned to, are displayed for an administrator. > The number of users is a count of the individual users that are assigned to the queue.

Collector Production	Provides a summary of statistics related to individual collector production. The production statistics are based on workflows run only on accounts/persons. The Average Time per Call is calculated based on the amount of time the user is logged in to Temenos Infinity divided by the number of calls made.
Failed Workflows	Provides a listing of all workflows with failed steps. The web part displays the name of the Workflow, the name of the Workflow Step and the date in which it was created.
My Assigned Workflows	Provides a listing of all workflow steps in a workflow queue that are assigned to the current user. The web part displays the name of the Workflow Step and the Due Date.
Person Queue Exceptions	Provides a listing of persons that are eligible for queue placement but are not in a collection queue. The web part displays the Person Number, name, Number of Accounts, and Total DQ Amount.
Promise Monitor	Provides a listing of users, by performance group, that shows counts of targets and actuals for both kept and broken promises.
Promise Value	Provides a listing of users, by performance group, that shows totals of targets and actuals for both kept and broken promises.
Queue Exceptions	Provides a listing of accounts that are eligible for queue placement but are not in a collection queue. The web part displays the Account Number, Primary Name on the account, Account Type, Days DQ, and DQ Amount.
Queue Performance	Provides a listing of all collection queues along with total counts of Total Average Persons in a Queue, Total Average Accounts in a Queue, Total Average persons Worked in a Queue, Total Average Accounts Worked in a Queue, Total Average Remaining Persons to be Worked, and Total Average Remaining Accounts to be Worked.
Queue Value	Provides a listing of all collection queues along with total counts and balance of all accounts, persons, existing accounts, and new accounts in each queue.
Reporting Services	Loads a Reporting Services report into a dashboard web part.

Suspended Workflows	Provides a listing of all workflows with interactive steps that could not be completed automatically. The web part displays the name of the workflow, the workflow step, and the date it was created.
System Integration	When this view is ran, the URL set in the View properties opens. For example, if http://www.temenos.com/en-us/ is set in the properties, Temenos's homepage opens when the view is run. http:// must be present in the URL.
User Performance	Provides a listing of users by performance group, showing targets and actuals for calls, contacts, and promises. See the Frequently Asked questions from the User Performance topic.
User Schedule	Provides a listing of users, by performance group, showing details of the user's schedule in a given time frame. The web part displays Login, Logout, Hours Worked, number of Breaks, Hours Break, and Session number.

View	Using this web part, configured views can be assigned to open when this web part is ran. Views are assigned within the web part's properties. The enhanced system defined view available through Views list allows the users to view applications assigned to them from Dashboard. The criteria based on which applications are assigned are system defined, not editable and **Determine Criteria** tab is disabled. When the view is executed and displayed, the following criteria is used to retrieve applications for the view:
	
	• Current logged-in user = Application > Assigned User
	
	The application is assigned to the current logged-in user.
	
	• Application Status does not equal any of the below:
	  ○ Disbursed
	  ○ Withdrawn
	  ○ Auto Withdrawn

Workflow Queue Detail	Provides a listing of all tasks in a selected workflow queue. Tasks are assigned within the web part's properties to display. The web part displays the Workflow Name, Step Name, Due Date, Created By, Primary's Name, Account number, and Case number.

Workflow Queue Summary	Provides a listing of all workflow queues and the number of active tasks in each queue. This web part displays the Workflow Queue Name and Number of workflows.

Case Detail Web Part

Case Detail

Refresh

Case Number	Case Title	Case Type
BK-00000014	Bankruptcy	Bankruptcy - Chapter 11
BK-00000074	bank	Bankruptcy - Chapter 11
BK-00000080	Bankruptcy	Bankruptcy - Chapter 11
BK-00000099	Removed from case	Bankruptcy - Chapter 11
BK-00000109	BK-00000109	Bankruptcy - Chapter 11
BK-00000123	bank	Bankruptcy - Chapter 11
BK-00000139	BK-00000139	Bankruptcy - Chapter 11
BK-00000152	real estate	Bankruptcy - Chapter 11
BK-00000170	Add to case	Bankruptcy - Chapter 11

Case Summary Web Part

Case Summary

Refresh

Case Type	Number of Cases
Bankruptcy Case Test	0
123CPBK Case	5
921dmc	6
Account	5
Bankruptcy - Chapter 11	66
Bankruptcy - Chapter 12	9
Bankruptcy - Chapter 13	23
Bankruptcy - Chapter 7	55

Collection Queue Summary Web Part

Collection Queue Summary

Refresh

Queue Name	Users	DQ Amount	Balance	Accounts	Worked Accounts	Worked Persons	Accounts Not Worked	Persons Not Worked	Percent Worked
Delinquent Loans - A to F	83	$11,541,645.12	$30,828,939.80	1,367	0	0	1367	1044	0.00%
Delinquent Loans - G to L	83	$13,002,417.73	$25,674,357.74	1,659	0	0	1659	1264	0.00%
Delinquent Loans - M to R	83	$18,233,881.77	$40,942,365.94	1,542	0	0	1542	1221	0.00%
Delinquent Loans - S to Z	83	$5,157,272,506.31	$388,641,629.07	2,225	0	0	2225	1687	0.00%

Collector Production Web Part

Collector Production

Refresh

This information was last updated as of 9/25/2012 1:01:45 PM.
Today you have been logged on for 3.25 hours.

Hours Worked	3.25
Number of Breaks	0
Total Length of Breaks	0.00
Average Time per Call	0.00

	Actual	Target	Variance
Calls	0	16	0.00%
Contacts	0	0	0.00%
Promises Made	0	0	0.00%

There are 0 promises due today. As of right now, 0 have been kept.

Failed Workflows Web Part

Failed Workflows

Refresh

Workflow	Step	Date Created
multi account workflow for l...	send letter-multi account	02/17/2011 12:34 PM
multi account workflow for l...	send letter-multi account	02/17/2011 12:39 PM
multi account workflow for l...	send letter-multi account	02/16/2011 02:07 PM
Multi-Acct(InternalQueue)	Select Accounts	10/20/2011 12:39 PM
Multi-Acct(InternalQueue)	Select Accounts	10/26/2011 08:46 AM
Multiple Account and singl...	Select Accounts	06/30/2011 02:31 PM

My Assigned Workflows Web Part

My Assigned Workflows

Refresh

Workflow Name	Due Date
Obtain Filer Schedules	3/2/2011 3:51:05 PM
Search Creditor Records	4/28/2011 2:42:44 PM
Step One	2/7/2012 9:55:51 AM
Step One	2/7/2012 10:23:39 AM
Step One	2/7/2012 10:25:09 AM
Step One	2/7/2012 10:25:31 AM

Person Queue Exceptions Web Part

Queue Exceptions - Person

Refresh View: Delinquency

Person Number	Name	Number of Accounts	Total DQ Amount
189-68-9222	MALIHA FAZELBHOY	1	$250.00
189-67-6222	QUINN TRAN	1	$35.00
666-55-4444	MARIA OFFENBACH	1	$250.00
155-88-6999	MEGAN KING	1	$300.00
166-96-9666	LANCE FILLMAN	1	$950.00

Promise Monitor Web Part

User Promise Monitor

09/25/2012 to 09/25/2012 Refresh

		Promises Broken			Promises Kept		
User	Promises Due	#	Target	%	#	Target	%
Group: Administators							
Admin, Admin	0	0	0	0	0	0	0
Lessig, Marge	0	0	0	0	0	0	0
Price, Mark	0	0	0	0	0	0	0
Zilko, Gary	0	0	0	0	0	0	0
	0	0	0	0	0	0	0

Promise Value Web Part

User Promise Value

09/25/2012 to 09/25/2012 Refresh

	Promises Due		Promises Broken		Promises Kept	
User	#	$	#	$	#	$
Group: Administators						
Admin, Admin	0	$0.00	0	$0.00	0	$0.00
Lessig, Marge	0	$0.00	0	$0.00	0	$0.00
Price, Mark	0	$0.00	0	$0.00	0	$0.00
Zilko, Gary	0	$0.00	0	$0.00	0	$0.00
	0	**$0.00**	**0**	**$0.00**	**0**	**$0.00**

Queue Exceptions Web Part

Queue Exceptions - Account

Refresh View: Delinquency

Account Number	Name	Account Type	Days DQ	DQ Amount
100174	MALIHA FAZELBHOY	Credit Card	62	$250.00
100175	QUINN TRAN	Credit Card	65	$35.00
100181	MARIA OFFENBACH	Autos	62	$250.00
100188	MEGAN KING	Autos	66	$300.00
100221	LANCE FILLMAN	Secured	88	$950.00
100224	STEVE GOLDSTEIN&	Secured	66	$196.00
100246	DAVID FORD	Secured	61	$650.00
100248	ANDREW ORGILO	Secured	61	$1,050.00

There is no limit to the number of accounts Queue Exceptions can hold; however, an error displays if an excessive amount of accounts are returned. If an error is received when loading Queue Exceptions, please contact a Temenos Customer Care Representative.

Queue Performance Web Part

Queue Performance

Last Update: 2/26 @ 7:37 AM 02/26/2013 to 02/26/2014 Refresh

Queue Name	Total Average Persons In A Queue	Total Average Accounts In A Queue	Total Average Persons Worked In a Queue	Total Average Accounts Worked In a Queue	Total Average Remaining Persons To Be Worked	Total Average Remaining Accounts To Be Worked
1 - 15 Days DQ	9	11	0	0	9	
16 - 30 Days DQ	25	34	0	0	25	
31 - 60 Days DQ	27	35	0	0	27	
61 - 90 Days DQ	15	20	0	0	15	

Queue Value Web Part

Queue Value

Last Update: 9/25 @ 1:41 PM 09/25/2012 to 09/25/2012 Refresh

		Total Accounts		Total Persons		Existing Accounts		New Accounts	
Queue Name	Collectors	#	$	#	$	#	$	#	$
Auto 15-29 Days DQ	2	3	$652,905.56	3	$654,556.56	3	$652,905.56	0	$0.00
Auto 30-59 Days DQ	50	4	$12,621.00	4	$17,620.00	4	$12,621.00	0	$0.00
Auto 60-89 Days DQ	2	7	$10,500.00	7	$10,500.00	7	$10,500.00	0	$0.00
Auto 90+ Days DQ	1	6	$12,750.00	6	$15,150.00	6	$12,750.00	0	$0.00
Mortgage 15-29 Day's DQ	2	0	$0.00	0	$0.00	0	$0.00	0	$0.00
Mortgage 30-59 Days DQ	2	36	$33,851.89	34	$55,376.78	36	$33,851.89	0	$0.00
Mortgage 60-89 Days DQ	2	7	$10,500.00	7	$11,075.00	7	$10,500.00	0	$0.00

Suspended Workflows Web Part

Suspended Workflows

Refresh

Workflow	Step	Date Created
! BH Business Rules Test2	Contact Method	5/1/2012 10:47 AM
!Account Context Single A...	PTP	4/26/2011 07:11 AM
!Account Context Single A...	PTP	4/27/2011 11:52 AM
!Account Context Single A...	PTP	4/28/2011 07:26 AM
!Account Context Single A...	PTP	4/29/2011 11:51 AM
!Account Context Single A...	PTP	4/29/2011 04:21 PM

User Performance Web Part

The User Performance Web Part is used to calculate and track user performance in Temenos Infinity. This web part displays target numbers and actual numbers for calls, contacts, and promises for each user within a performance group. The numbers within this web part are calculated based on the calls placed, valid contacts made, and promises obtained by each user while working a person.

User Performance

Last Update: 8/18 @ 4:02 PM 08/18/2014 to 08/18/2014 Refresh

		Calls			Contacts			Promises		
User	Performance	#	Target	%	#	Target	%	#	Target	%
Group: Collectors										
[illegible]	0	0	0	0	0	0	0	0	0	0
[illegible]	0	0	0	0	0	0	0	0	0	0
[illegible]	89	8	47	17	5	2	250	0	0	0
[illegible]	0	0	0	0	0	0	0	0	0	0
	89	8	47	17	5	2	250	0	0	0

Performance Measures

When a workflow is executed in the workspace, the system keeps track of the number of calls, contacts, and promises for each user. This data is used by the system administrator for performance tracking and/or incentive purposes. User performance is measured through the following:

- Calls

The Contact Method step in a workflow allows the user to document how they either made contact or attempted to make contact with an account holder. Users are credited with a call when the Contact Method step is completed in a workflow.

Since the Contact Method workflow step allows for multiple contact attempts, a call is recorded for each contact attempt made within the workflow step. For example, when a user runs the Contact Method workflow step and makes two contact attempts, then the user receives credit for two calls.

> When a workflow is canceled or left active but a Contact Method step is completed, a Call is still recorded for the collector.

Please see the Contact Method Workflow Step topic within this guide to learn more about this workflow step.

- Contacts

System administrators determine which contact results within the Contact Method workflow step are considered valid contacts.

> Contact results and valid contacts for this workflow step are defined by the system administrator in System Management > Field Configurations.

As previously mentioned, the Contact Method workflow step allows for multiple contact attempts to be made, which can result in more than one valid contact. Users are credited with a contact for each Valid Contact recorded within a Contact Method workflow step.

> When a workflow is canceled or left active that includes a Valid Contact, a Contact is still recorded for the collector.

- Promise to Pay

The Promise to Pay step in a workflow allows the user to take a promise to pay as well as manage existing promises. Users are credited with a promise when a promise to pay step is completed in a workflow.

> When a promise to pay is taken by a user, but canceled on the same day, a promise is still recorded for that user.

For more information regarding this workflow step, please see the Promise to Pay workflow step topic within this guide.

To learn more about running a workflow, please see the Running Workflows topic within this guide.

> Additional information regarding workflow configuration can be found within the Workflows topic in the Administrator Guide.

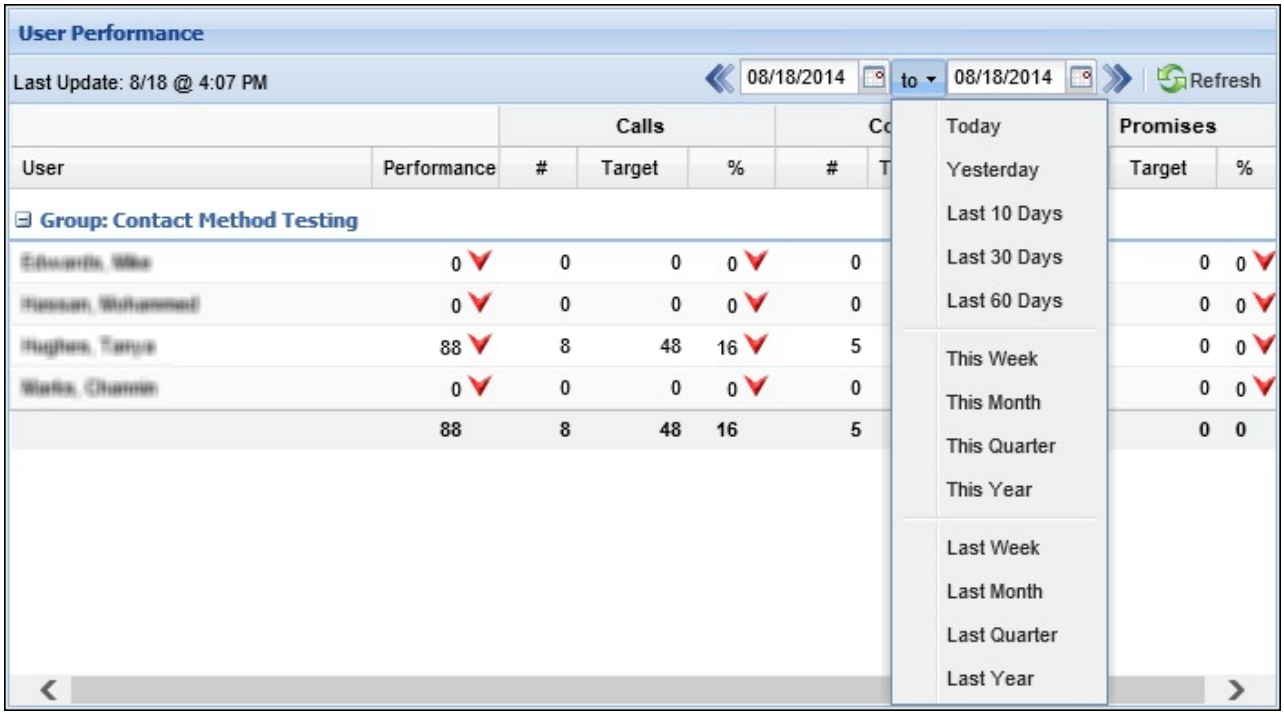
Navigating the User Performance Web Part

Date Selection

The date and time of the last update to the User Performance Web Part is recorded within the top left of the screen.

By default, performance numbers for the current day are displayed within the grid, however users are able to refine this table by modifying the date range.

- Click the button to change the date range to the previous calendar day.
- Click the button to change the date range to the next calendar day.
- The User Performance Web Part also contains a variety of pre-configured date ranges that are available from the To drop-down list.



- Click the **Refresh** button to view performance numbers for the selected date range.

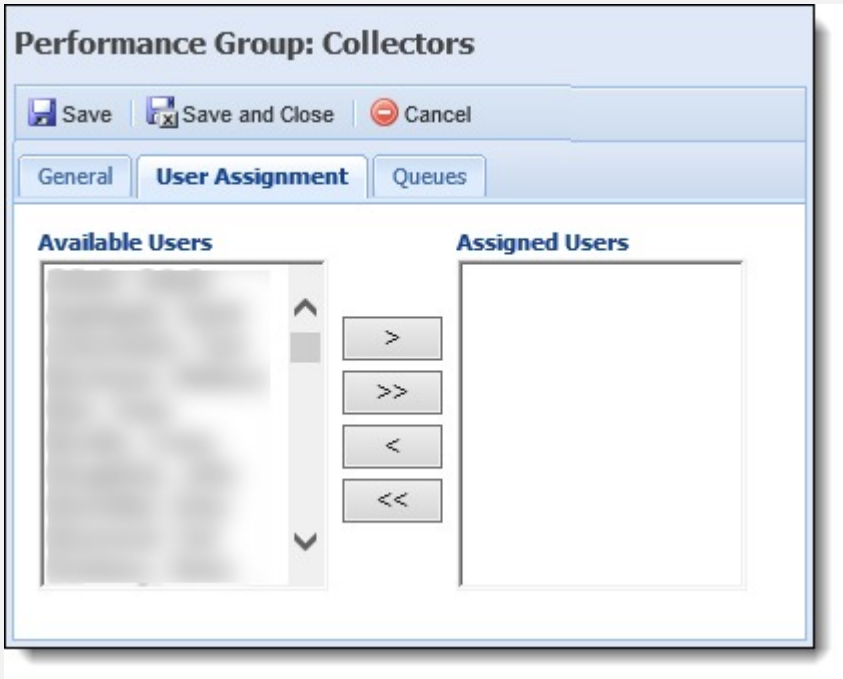
User Performance Grid

The grid within the User Performance web part displays the following columns of information:

User

The User column is organized by performance group and displays the name of each collector assigned to the group. This provides the ability to analyze individual performance numbers, as well compare performance results across group members. Click on a User name to open the User Detail screen for that User.

The Performance Groups that display within this web part are created by the system administrator in System Management > Groups > Performance Groups. In order to view and track performance results for a user within this web part, the user must be assigned to the performance group on the User Assignment tab of the Performance Group configuration window.



For more information on performance groups, please see the Performance Group topic in the Administrator Guide.

User Detail Screen

The User Detail Screen displays the user's individual performance numbers for the time frame selected in the date range drop-down box. This screen is a helpful tool to track a user's day to day performance.

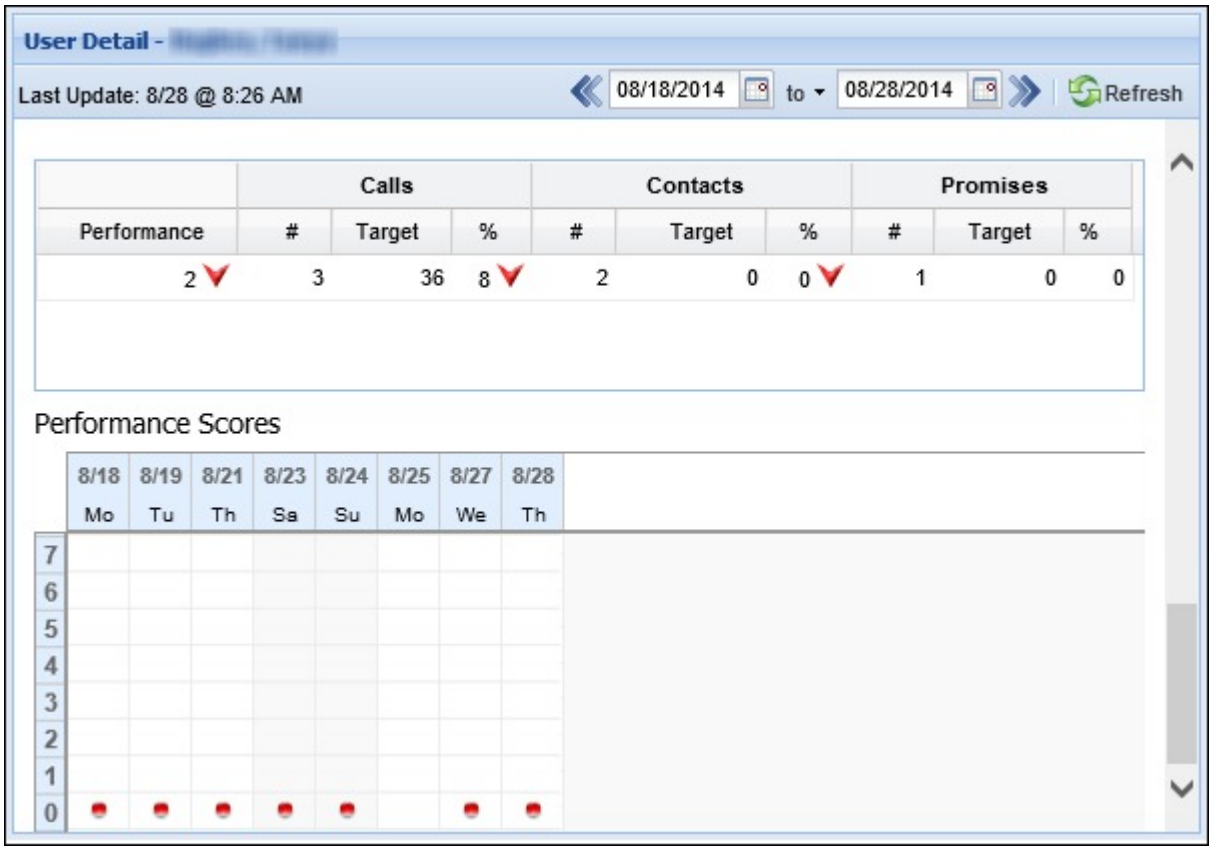
The date range on the User Detail screen can be modified in the same manner as on the User Performance Screen.

The top grid on this screen displays the selected user's individual performance numbers in the same format as on the User Performance Screen. Below the top grid, the Performance Scores section includes a grid displaying the user’s overall performance score(s).

The Performance Scores grid lists the date(s) for the selected time frame along the top of the grid and a range of the user's performance scores along the left.

The highest performance score is the top number displayed in the grid.

The red icon identifies the user's overall performance score for the date identified.



Performance

The Performance column displays a user's overall performance percentage. This percentage is determined by averaging the percentage of Calls, Contacts, and Promises recorded for a user with the following expression:

(Calls % + Contacts % + Promises %)/3

For example, if Calls % is 51, Contacts % is 75, and Promises % is 114, then the user's Performance % is 80 [(51+75+114)/ 3].

Performance Icons

The performance icon found to the right of the number in each **%** column represents how a user is performing in relation to the target numbers assigned to them by the system administrator.

> Target numbers for a user are defined on the Collection Settings tab in System Management > Users. For more information on these settings and how they contribute to user performance, please see the Users topic in the Administrator Guide.

These performance icons are determined by the Monitor Margin Update percentage defined by the system administrator and identify the following information about a user's performance:

> The Monitor Margin Update percentage is configured in System Management > Modules > Collection. For more information, please see the Solutions topic within this guide.

Performance Icon	Description
	Indicates the collector is below their target number of calls, contacts, and/or promises.

	Indicates the collector is above their target number of calls, contacts, and/or promises.
	Indicates the collector is even with their target number of calls, contacts, and/or promises.

Calls

The Calls column displays the following performance numbers for a user's Call performance:

Column	Description
#	The # column lists the actual number of calls recorded for a user.
Target	The Target column displays the target number of calls a user is expected to make for the specified time period. This performance number is calculated using the following expression: Total Calls Per Hour x Hours Worked = Target Number of Calls
%	The % column displays a user's overall call performance expressed in a percentage. This performance number is calculated using the following expression: # of Calls/Target Calls = Performance % For example, if 60 calls were made and the target is 80, then the performance percentage is 75. Total Calls Per Hour is a value determined by the system administrator and configured for each user. This setting is defined on the Collection Settings tab in System Management > Users.

Contacts

The Contacts column displays the following performance numbers for user's Contact performance:

Column	Description
#	The # column lists the actual number of valid contacts recorded for a user.

Target	The Target column displays the target number of valid contacts a user is expected to make for the specified time period. This performance number is calculated using the following expression: Actual Calls x Target % Contacts= Target Number of Contacts Target % Contacts is a value determined by the system administrator and configured for each user. This setting is defined on the Collection Settings tab in System Management > Users. For example, if 40 calls are made and the target % of contacts is 50, then the target number of contacts is 20 (40 x .50). If the target number is not even, then the value truncates. For example, if the user makes 37 calls and the Target % Contacts is 50, the value displayed for Target Contacts is 18 instead of 18.5.
%	The % column displays a user's overall contact performance expressed in a percentage. This performance number is calculated using the following expression: # of Contacts/Target Contacts = Performance % For example, if the target number of contacts is 20 and 15 contacts were made, then the performance percentage is 75%.

Promises

The Promises column displays the following performance numbers for a user's Promise performance:

Column	Description
#	The # column lists the number of promises recorded for a user.
Target	The Target column displays the target number of promises a user is expected to obtain for the specified time period. This performance number is calculated using the following expression: Number of Contacts x Target % Promises= Target Number of Promises Target % Promises is a value determined by the system administrator and configured for each user. This setting is defined on the Collection Settings tab in System Management > Users. For example, if the number of contacts is 20 and target % of promises is 60% then the target number of promises is 12.
%	The % column displays a user's overall promise performance expressed in a percentage. This performance number is calculated using the following expression: # of Promises/Target Promises = Performance % For example, if the target number of promises is 12 and 9 promises were made, then the performance percentage is 75%.

User Schedule Web Part

User Schedule

Last Update: 9/25 @ 2:12 PM 09/25/2012 to 09/25/2012 Refresh

User	Login	Logout	Hours Worked	Break	Hours Break	Session
Group: Administators						
Admin, Admin	09/25/2012 08:23 AM	09/25/2012 08:46 AM	0.38	0	0.00	1
Lessig, Marge	09/25/2012 12:29 PM	09/25/2012 12:35 PM	0.10	0	0.00	1
Price, Mark	-	-	0.00	0	0.00	0
Zilko, Gary	-	-	0.00	0	0.00	0
			0.48	0	0.00	2

View Web Part

Accounts between 30 and 60 days DQ

Export Print

Account Number	Name	Balance	Purpose Code	Days DQ	DQAmount
[illegible]	[illegible]	$12,148.48		60	$1,500.00
[illegible]	[illegible]	$10,000.00		60	$350.00
[illegible]	[illegible]	$6,522.00		60	$410.00
[illegible]	[illegible]	$81,047.16		60	$1,500.00
[illegible]	[illegible]	$2,352.26		60	$1,500.00
[illegible]	[illegible]	$4,484.00		60	$1,500.00
[illegible]	[illegible]	$1,068.29		60	$1,500.00

Workflow Queue Detail Web Part

Workflow Queue Detail

Refresh View Summary

Workflow Name	Step Name	Due Date	Created By	Name	Account	Case
View case screen	View Workflow History	12/7/2007	tshoemaker	CALVIN WILLIAMS	100519	
income interruption	income	3/1/2011	mestabrook	Audrey Looner	100101	
View case screen	View Workflow History	3/5/2011	Ajonnalagadda	JEAN LITTLE	110152	
View case screen	View Workflow History	3/5/2011	Ajonnalagadda	JEAN LITTLE	110152	
Many Decision workflow	RFD and VDT	3/3/2011	Ajonnalagadda	SUSAN ANDERSON	100448	
View case screen	View Workflow History	3/7/2011	Ajonnalagadda	KEVIN LONG	100128	
View case screen	View Workflow History	5/21/2011	tshoemaker	SUSAN SINGER	100186	

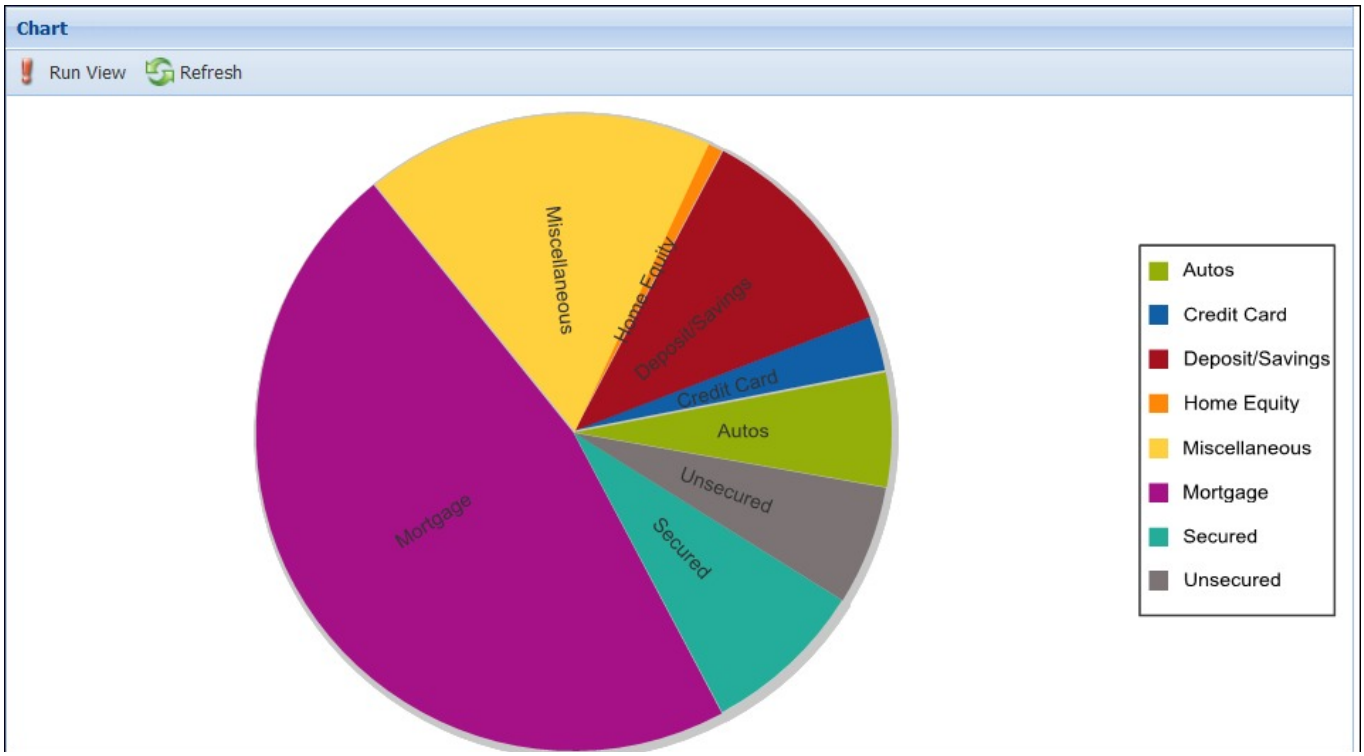
Workflow Queue Summary

Workflow Queue Summary

Refresh

Workflow Queue Name	Number of Workflows
Administration	0
Arizona Test Task Queue	0
Bankruptcy	6
Bankruptcy Management	0
CLM	0
Collections	0

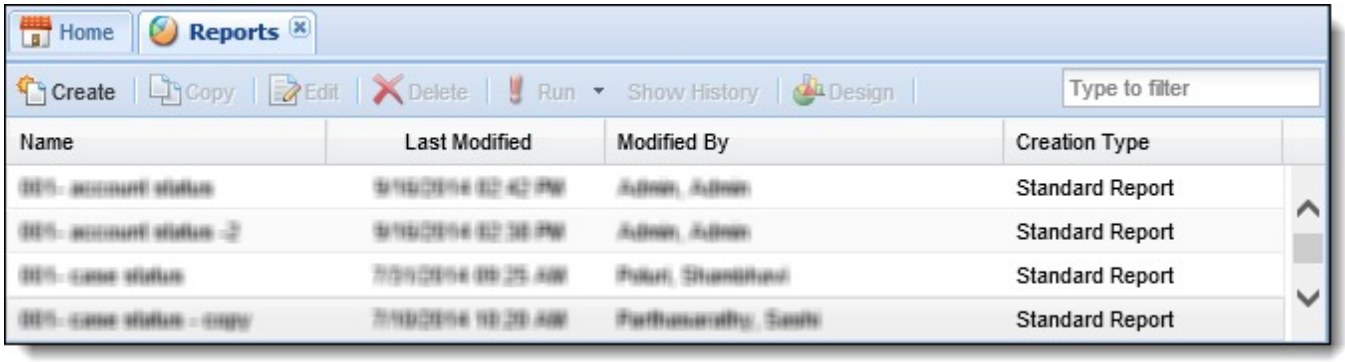
Charting Web Part



Reports Administration

New reports can be created to view information about accounts, Cases, Persons, Promises, Payments, End User performance, and workflows in Temenos Infinity. Reports can run and managed from the Work section in the Ribbon Bar.

Clicking in the Ribbon bar opens the Reports page. From this page, administrators are able to create, copy, edit, and delete reports.



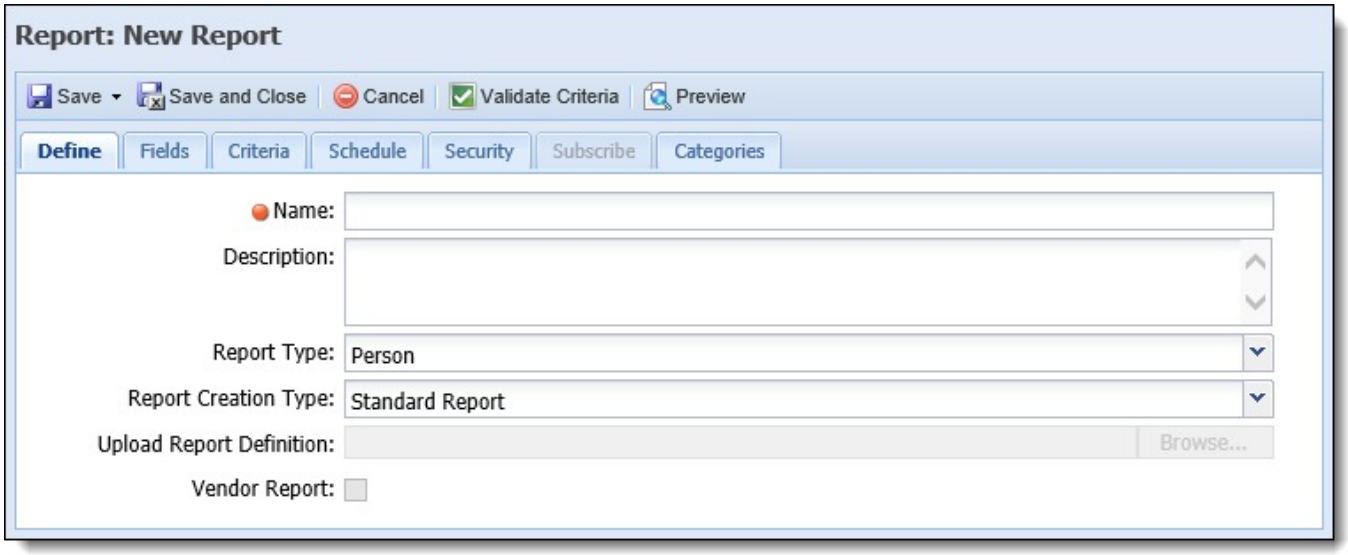
The Design button is only enabled for Advanced Report building. For more information on this feature, contact a Temenos Account Manager and/or refer to the Advanced Report Builder section within this guide.

Report Attributes

All reports share common attributes that are defined when creating, copying, and editing a report.

Define

Within the Define tab, enter the general information for the report.



The following attributes are defined within this tab:

Attribute	Description
Name	Enter a name for the report. This is a required field.
Description	If necessary, enter a description for the new report.

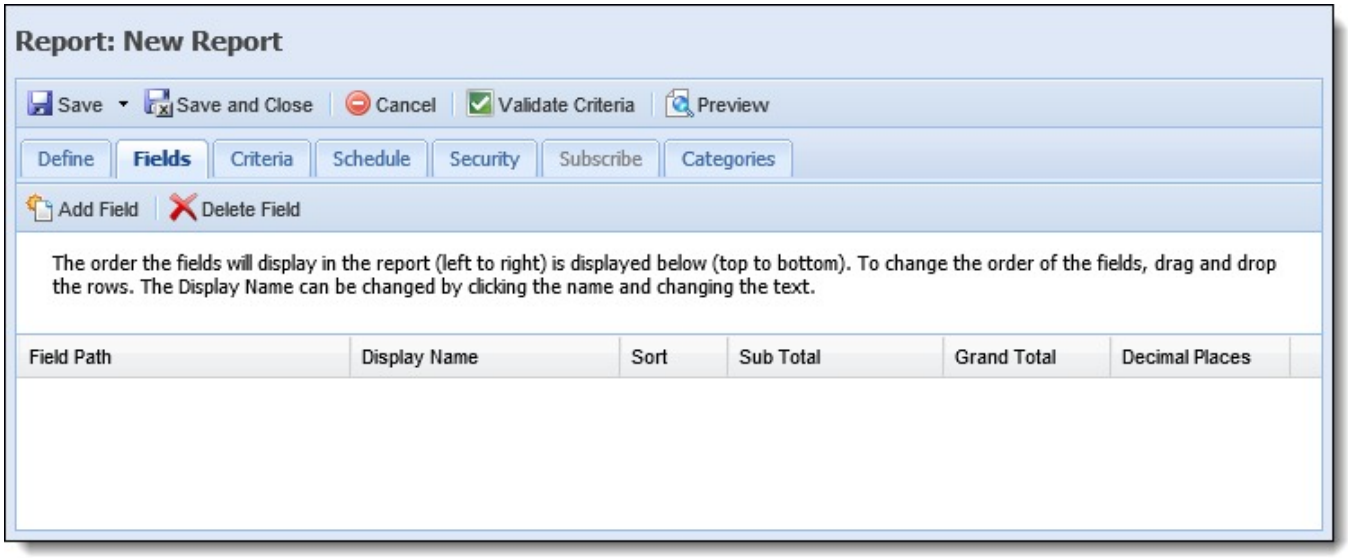
<table>
<tr><td>Report Type</td><td>Select a Report Type from the drop-down. This determines what fields are included within the report data. The following report types are available for selection:
<table>
<tr><th>Report Type</th><th>Description</th></tr>
<tr><td>Account Report</td><td>This report type includes fields specific to accounts.</td></tr>
<tr><td>Case Report</td><td>This report type includes fields specific to cases.</td></tr>
<tr><td>Expense Report</td><td>This report type includes expense level fields that are populated from the Expenses screen.</td></tr>
<tr><td>Payment Report</td><td>This report type includes fields that are included in daily payment imports.</td></tr>
<tr><td>Person Report</td><td>This report type includes fields specific to persons.</td></tr>
<tr><td>User Report</td><td>This report type includes fields that relate to user activity.
If desired, system administrators can use this report type to create a report of active users at the institution, which can then be exported to Excel, and used to automatically populate connector credentials for each user in Temenos Infinity. For more information on this functionality, please see the Credentials section of the Users topic in this guide.</td></tr>
<tr><td>Workflow Archive Report</td><td>This report type includes fields that relate to work that is being performed within the system.</td></tr>
<tr><td>Workflow/Comment Report</td><td>This report type includes fields that relate to work that is being performed within the system with the addition of comment related fields.</td></tr>
</table>
</td></tr>
<tr><td>Report Creation Type</td><td>Select the Report Creation Type from the drop-down. The following options are available:
<table>
<tr><th>Report Creation Type</th><th>Description</th></tr>
<tr><td>Standard</td><td>Reports that are built through the Temenos Standard Report Viewer.</td></tr>
<tr><td>Predefined</td><td>Reports that are built through Microsoft Reporting Definition Language.</td></tr>
<tr><td>Advanced</td><td>Reports built using the Temenos Advanced Report Designer. For more information on this feature, contact a Temenos Account Manager and/or refer to the Advanced Report Builder topic within this guide.</td></tr>
</table>
</td></tr>
<tr><td>Upload Report Definition</td><td>Click Browse to upload a saved RDL file. This field is only enabled for Pre-defined reports.</td></tr>
</table>

Vendor Report	Select the check box to identify the report as a vendor report. This check box is only enabled for Application type reports. By default, this check box is set to false. When set to true, the report populates as an option to assign to a vendor for use in a vendor instance of Virtual Capture. A two-box control populates within the Security tab in the report configuration window to assign vendors to the report, and the report is listed as an available option to assign to a specific vendor within the Vendor Portal Reports tab in Vendor Management. For more information on assigning reports to a vendor, please see the Security section in this topic, and/or the Vendor Portal Reports section of the Vendor Management topic in this guide.

Fields

The Fields tab is only enabled when a Standard Report is being created.

Field attributes enable administrators to select the fields that display in the report. The order that the fields are listed in this tab determines the order in which they appear within the report.



The Fields tab displays the following columns of information about each field:

Column Name	Description
Field Path	Displays the path of the field in the database.
Display Name	The name of the field as it appears in the report. Users can change the name by clicking within the column.
Sort	Defines how the field data is displayed. Clicking within the column opens a drop-down in which the user can select None, Ascending, or Descending.

Sub Total	Performs calculations at a group level. Clicking within this column opens a drop-down including the following options: • GroupBy • Sum • Avg • Min • Max • Count If selecting the Group By option from the drop-down, the report field is grouped by the Display Name.
Grand Total	Performs a total calculation for all records in the report according to the calculation type selected. Clicking within this column opens a drop-down including the following options: • None • Sum • Avg • Min • Max • Count
Decimal Places	Defines the number of decimal places. This column is used for interest rates only.

Field Tips

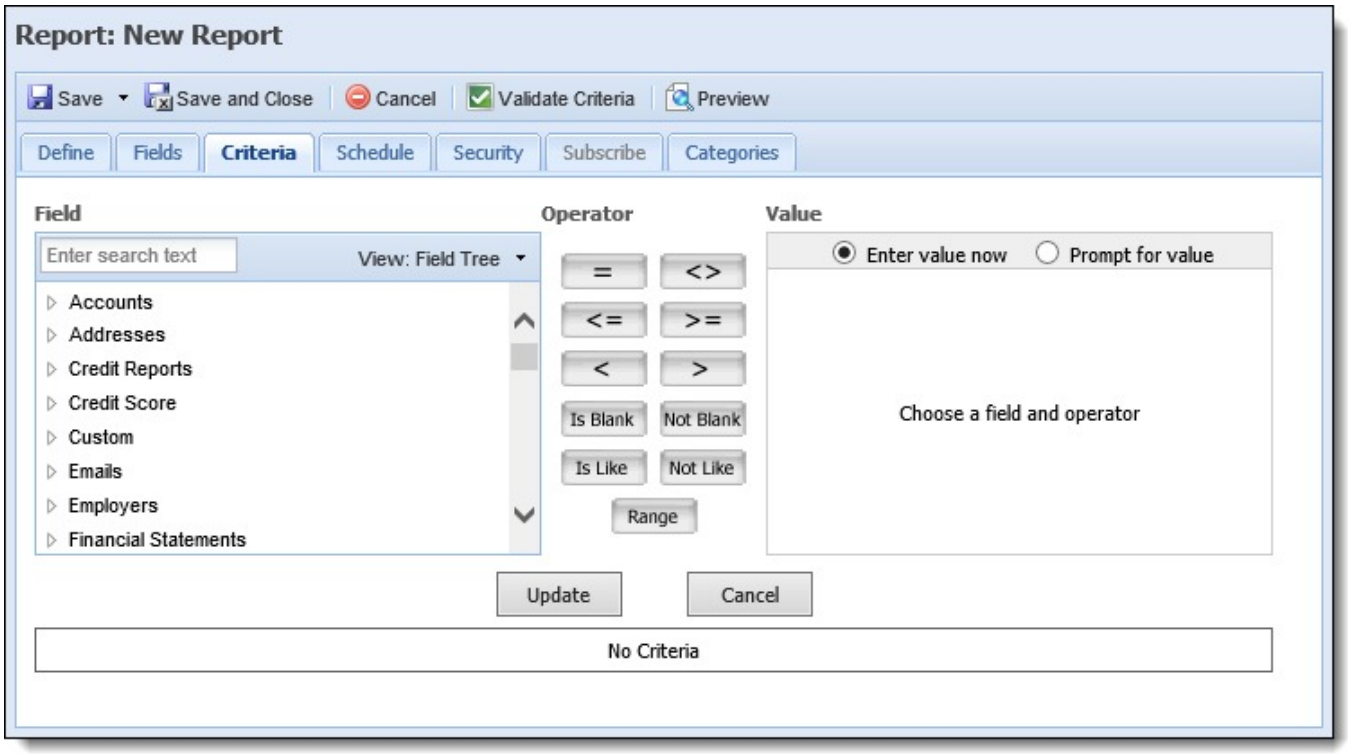
Prior to adding fields to a report, it is recommended to review the following to ensure the expected data populates in the report:

- Adding fields from any of the "All" folders in the Field List, such as All Persons for an Account type report, could produce multiple records for an account when a report is generated. For example, if fields from the Application > All Persons > Addresses > folder are included in the report, and the primary account holder has three addresses, three separate records populate in the report; one for each address. If there is a joint on the account, separate records also populate in the report for each address listed for the joint.
- If it is desired to produce one line of data for each account in the report, use the report Criteria to filter data for a specific address type, or role, or use fields from specific folders in the Field List in place of the "All" fields. For example, use fields from the Primary or Secondary folders, rather than All Persons.

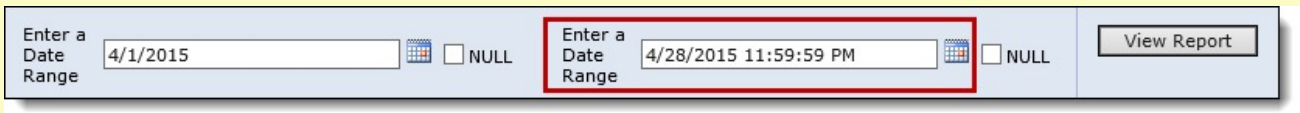
Criteria

The Criteria tab is only enabled when a Standard Report is being created.

Within the Criteria tab, use the criteria builder to specify what data is included in the report.



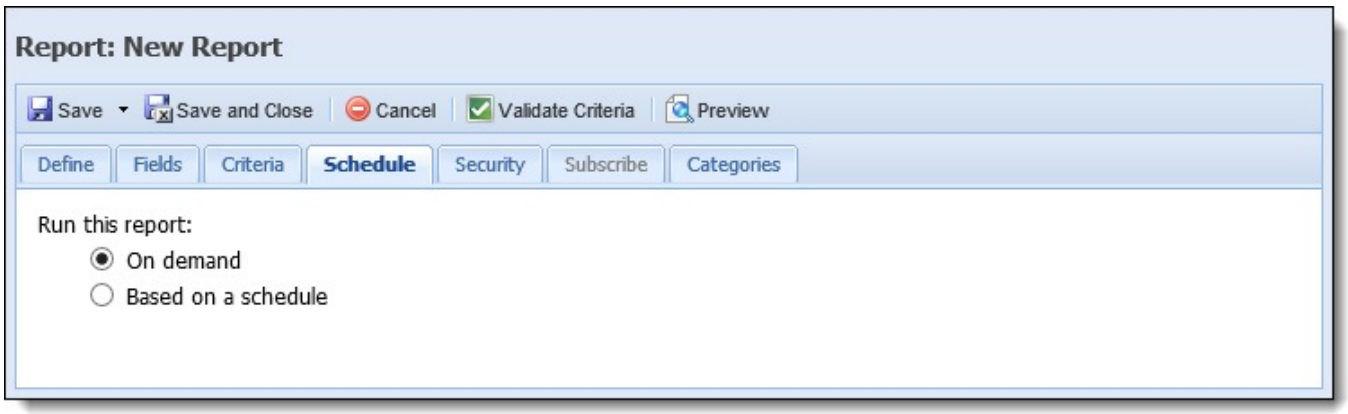
When a date range is not specified within the report criteria and the report is configured to prompt the user to enter a date range, the End Date range assumes a time of 00:00:00 if a time is not appended to the end date when the report is run. To ensure information for the desired end date is included within the report, users can add a time in 00:00:00 format to the End Date or select a date that is one day ahead of the desired end date. For example, if a report is to include information from 4/1/2015 to 4/28/2015, in order to ensure information for 4/28/2015 is included, a date range of or 4/29/2015 or 4/28/2015 11:59:59 PM must be entered as shown in the below example:



For more information on the Criteria Builder, see the Criteria Builder Help topic within this guide.

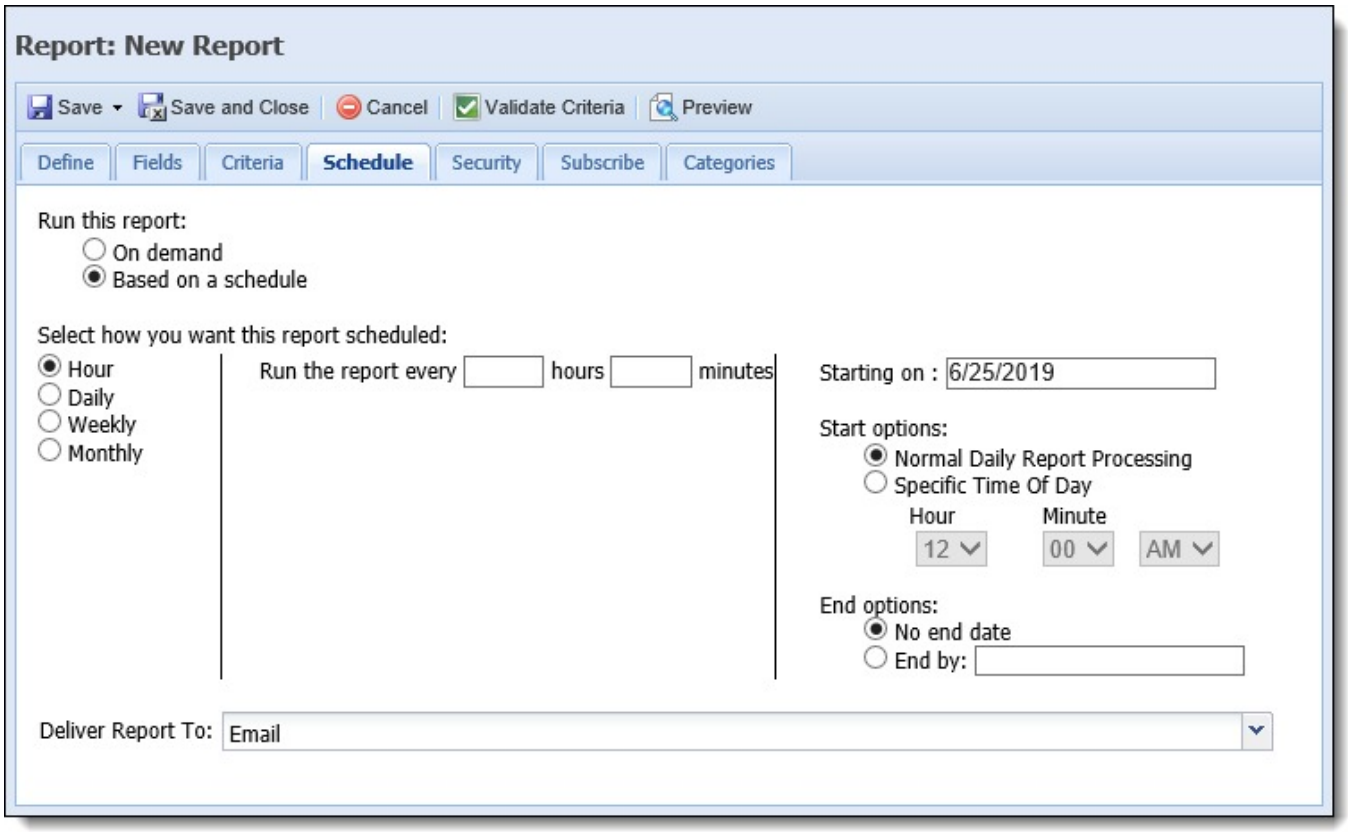
Schedule

Within the Schedule tab, determine if the new report is to run on demand or based on a schedule.



If Based on a schedule is selected, users can define when the report is to be run, and where it is delivered, as shown in the below example:

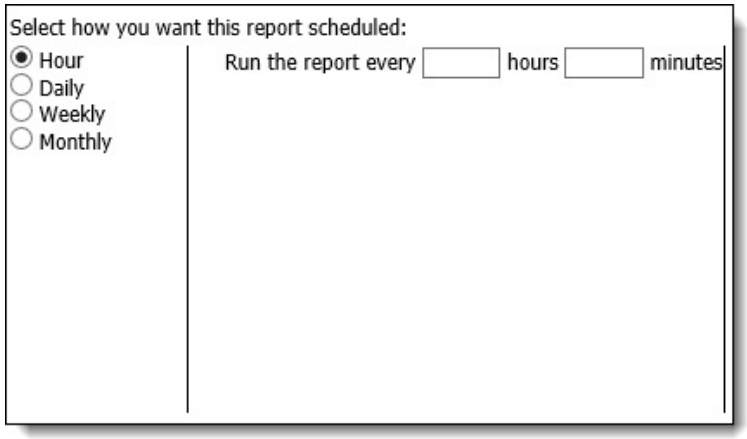
> The SQL Server Agent service must be started in the database in order for scheduled reports to run. If SQL Server Agent service is not running, an error is received when trying to access a scheduled report in Temenos Infinity.



Upon selecting Based on Schedule, the Schedule tab updates to include the following attributes, which provide the ability to define the time configurations, and delivery location, for the report:

Attribute	Description

<table>
<tr><td>Select how you want this report to be scheduled</td><td>Provides the ability to define the frequency in which the report as run, as well as the start and end dates for the report's generation. This attribute includes the following three sections of information:
<table>
<tr><th>Section</th><th>Description</th></tr>
<tr><td>Section 1</td><td>Select a one of the following radio buttons to determine the frequency in which the report is run:<ul><li>Hour</li><li>Daily</li><li>Weekly</li><li>Monthly</li></ul></td></tr>
</table></td></tr>
</table>

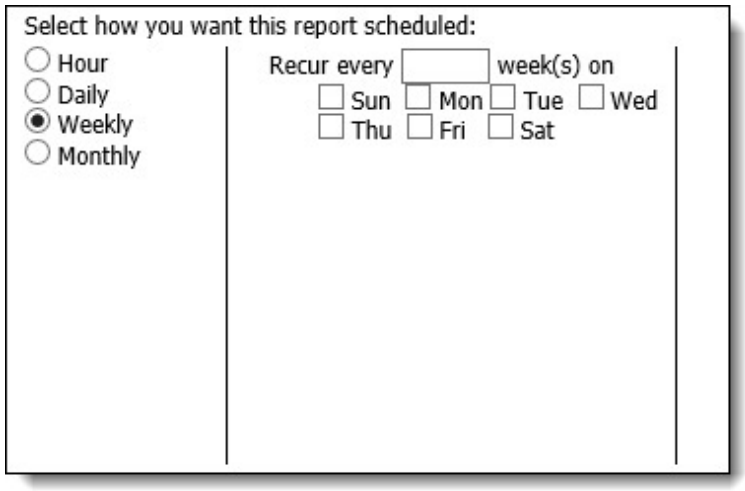
Section 2	Define additional information about the frequency in which the report should be run, such as the specific days of the week, or months of the year. The information that appears in this section is based on the frequency selected to allow system administrators to define specific details for their desired time-frame: ▸ Hour When Hour is selected as the frequency, this section appears as follows:  Enter a numerical value within each text box to determine how often (in hours and minutes) the report is run. For example, every 6 hours and 15 minutes. ▸ Daily When Daily is selected as the frequency, this section appears as follows: Select one of the following radio buttons to determine if the report is run once every certain number of days, or once each weekday: • Every [ ] days - Runs the report once after the number of

days configured for the parameter have passed. If this value is desired, enter a numerical value within the text box to define the number of days that must pass between each report generation. For example, every 2 days.

- Every weekday - Runs the report once every weekday.

Weekly

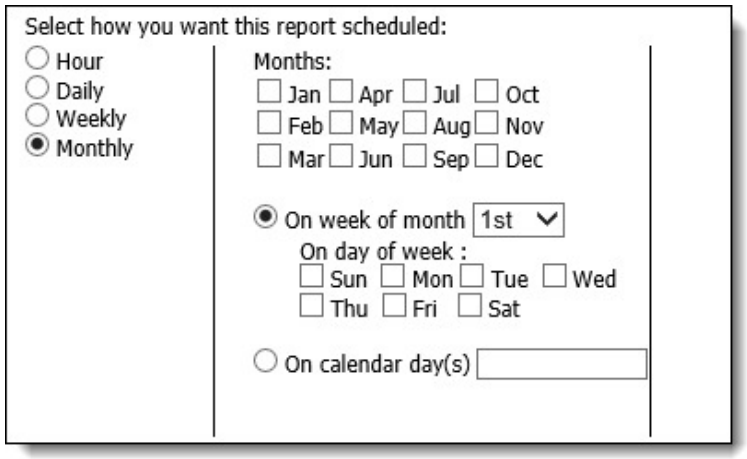
When Weekly is selected as the frequency, this section appears as follows:



Enter a numerical value within the text box to define how often (in weeks) the report is to be run, and select the check box next to each of the desired days.

Monthly

When Monthly is selected as the frequency, this section appears as follows:



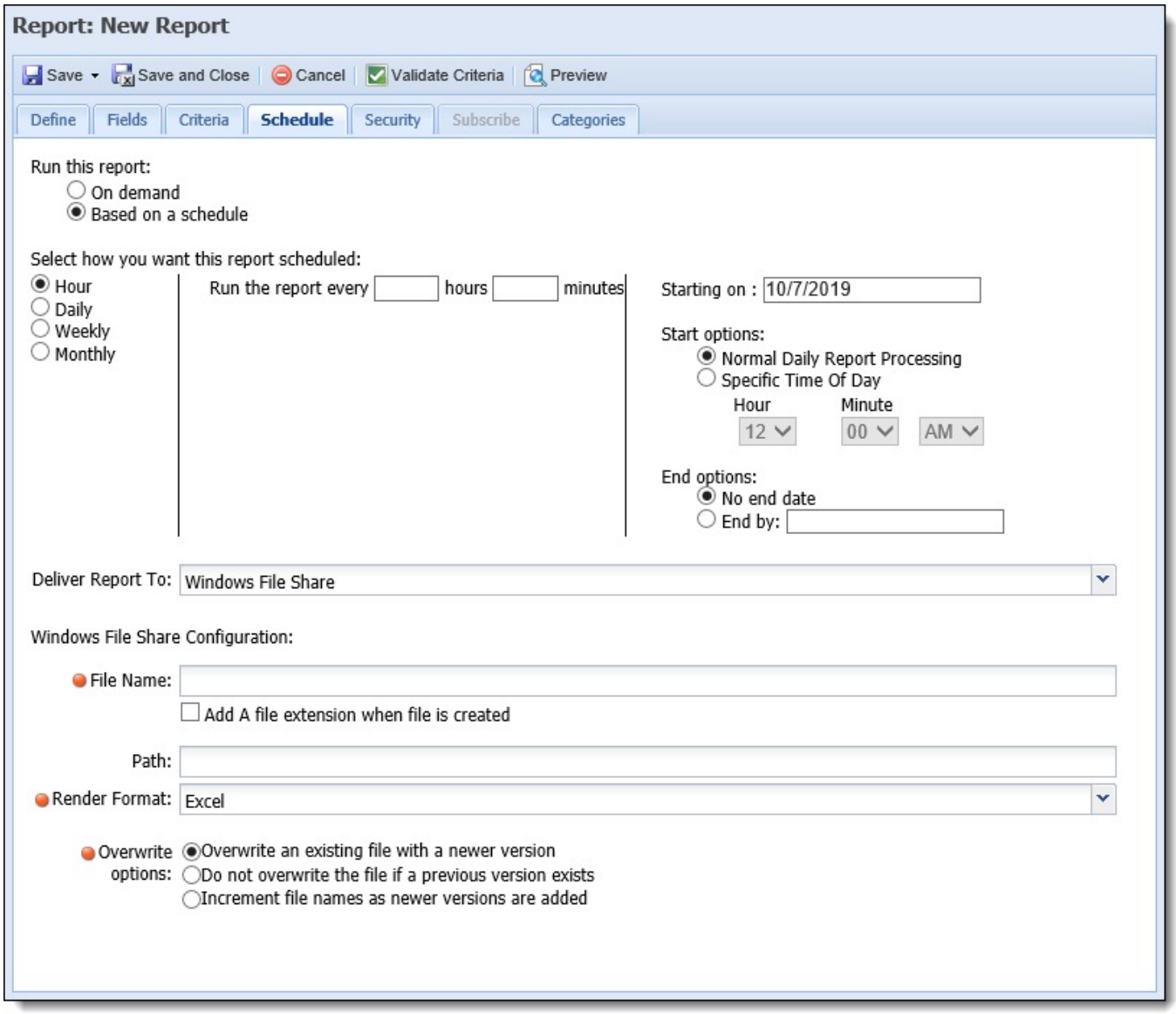
Select the check box next to each month in which the report should be run, as well as one of the following radio buttons to define when the report is run during that month:

- On week of month [ ] - Runs the report on specific days

		of the 1st, 2nd, 3rd, 4th, or last week of the month. If this value is desired, select an option from the drop-down list to identify the week of the month the report is to be run, and a check box next to each day of that week that the report generation should occur. • On calendar days(s) [ ] - Runs the report on specific days of the month. If this value is desired, enter a numerical value within the text box to determine on which calendar days the report is to be generated.
	Section 3	Define the Start and End options for the report's schedule, such as the date the schedule starts, the time of the day the report is run, and the last date the report is generated on the schedule.
Deliver Report To	Provides the ability to select one of the following values from the drop-down list to determine if the scheduled report is delivered via email, or to a Windows file share location defined by the institution: By default, this attribute is set to Email. • Email - The report is sent to the email address(es) entered within the Subscribe tab of the report configuration window. • Windows File Share - The report is sent to the File Path location defined within the Report Server Credentials section of the General tab in Administrative Settings, or the Windows File Share Configurations section of the report configuration window. • Both - The report is sent to the File Path location defined for the report, as well as the email address(es) entered within the Subscribe tab. When set to Windows File Share or Both, additional fields populate within the Schedule tab to define the details for the file being generated. Please see the Windows File Share Configurations section in this topic for more information. If set to Windows File Share or Both, a folder must be created by the institution in the file path location for the report prior to the report being delivered. A minimum requirement to export reports to a shared location is SQL Server 2014 or higher.	

Windows File Share Configurations

When Deliver Report To is set to Windows File Share or Both, the Schedule tab updates to include a Windows File Share Configurations section, as shown in the below image. This section includes the details that must be defined for the file being sent to the share drive.



The following required fields populate within the Schedule tab to define the details for the file being generated for the report:

Attribute	Description
File Name	Enter the name of the file. If it is desired to add a file extension when the file is created, select the check box below the File Name attribute titled **Add a file extension when file is created**. The Add a File Extension check box defaults to false.

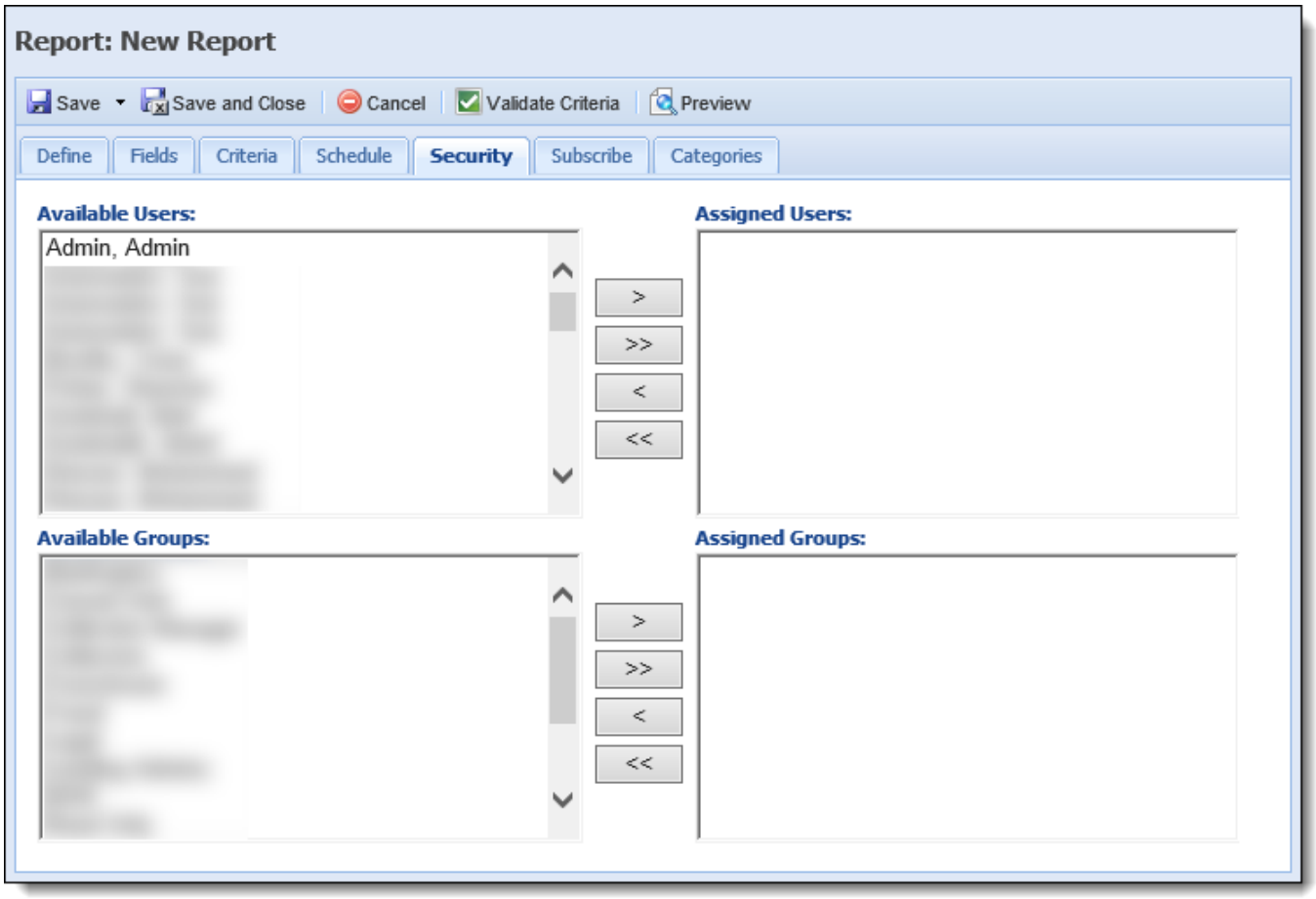
Path	Enter the file path location where the report is to be exported. If a file path is not defined, the report is exported to the File Path location set within the Report Server Credentials section of the General tab in Administrative Settings. The file path location must begin with "\\" in order to conform to the Uniform Naming Convention (UNC) format. If "\\" does not appear in the beginning of the file path, an error is received upon saving the Administrative Settings page. A folder must be created in the file path location by the institution, prior to the report(s) being delivered.
Render Format	Select an option from the drop-down list to identify the format of the file being generated. This drop-down defaults to Excel, and includes a list of the following values: • Excel • PDF • XML file with report data • CSV (comma delimited) • Data Feed • MHTML (web archive) • TIFF file • Word

Overwrite Options	Select one of the following options to determine the behavior that occurs each time a file for the report is generated and placed in the share location: By default, this attribute is set to Overwrite an existing file with a newer version.

Overwrite Option	Behavior
Overwrite an existing file with a newer version	This option overwrites the existing file in the share path location, and replaces it with the new file generated for the report.
Do not overwrite the file if a previous version exists	This option does not overwrite an existing file in the share path location. When there is an existing report in the share path location, the new report is not generated on the server, but is added to Report History for later viewing.
Increment file names as newer versions are added	This option adds a new file to the share path location with an underscore and number, which increments as newer files are added. For example, Report File.pdf, Report File_1.pdf, Report File_2.pdf.

Security

Security attributes enable administrators to assign available Users and/or Groups access to the report.



The following Security attributes are defined within the Security tab:

Attribute	Description
Assign Users	Select the desired users from the Available Users list, and move them to Assigned Users list, to provide users access to the report in Temenos Infinity. The Available User box includes a list of all active users in System Management > Users.
Assign Groups	Select the desired security groups from the Available Groups list, and move them to Assigned Groups list, to provide users in the group access to the report. The Available Groups box includes a list of all active security groups in System Management > Groups > Security Groups.

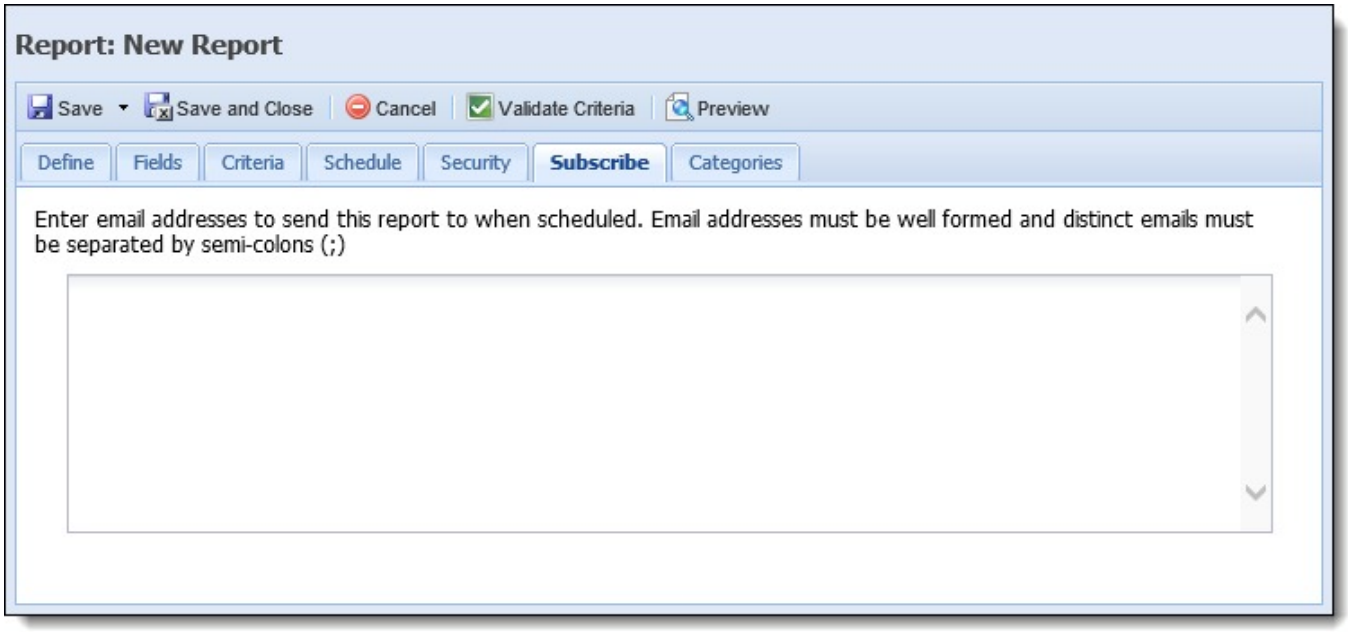
Subscribe

If Based on a schedule is selected in the Schedule tab, and the Deliver Report To attribute is set to Email or Both, the Subscribe tab is enabled.

> This tab is disabled when a report is set to run on demand, or when based on a schedule and Deliver Report To is set to Windows File Share.

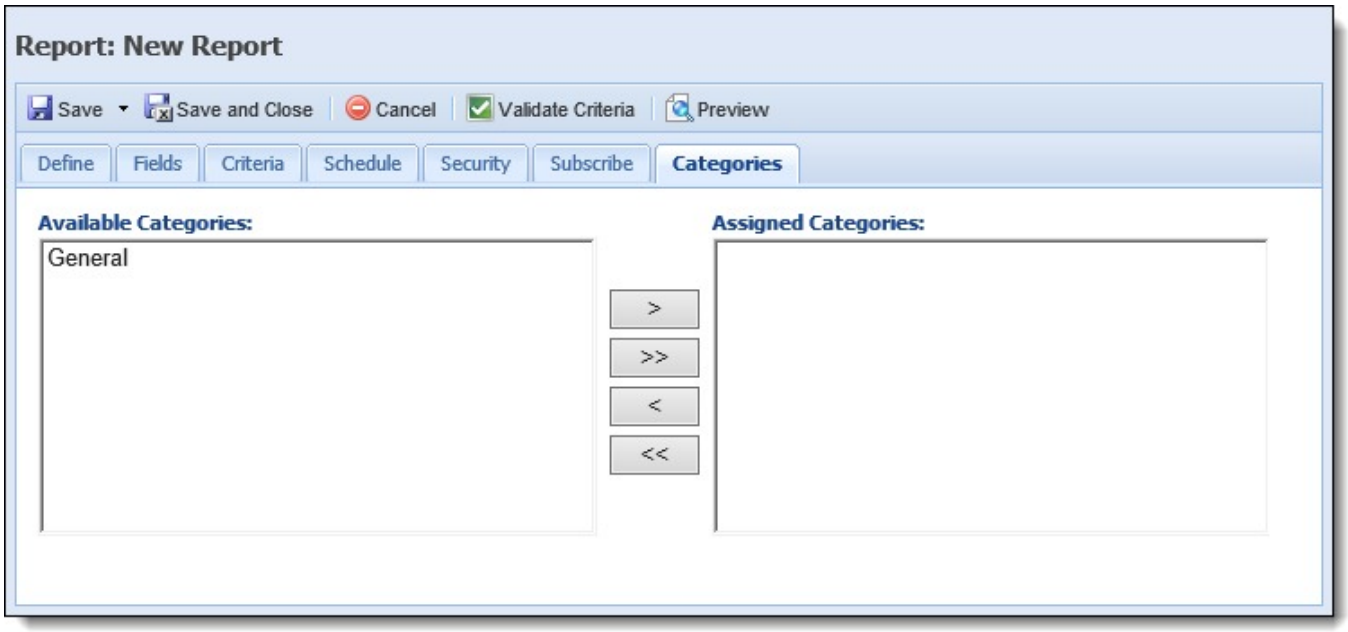
Users can enter email addresses within the text area to receive the report results once the report is run. For this feature to work, system email settings must be configured in System Management > Administrative Settings

> Email Settings.



Categories

The Categories tab provides administrators with the ability to assign the report to specific categories.



The following attribute is defined within the Category tab:

Attribute	Description
Assign Categories	Select a category from the Available Categories list and move to the Assigned Categories list to make the report accessible to the category.

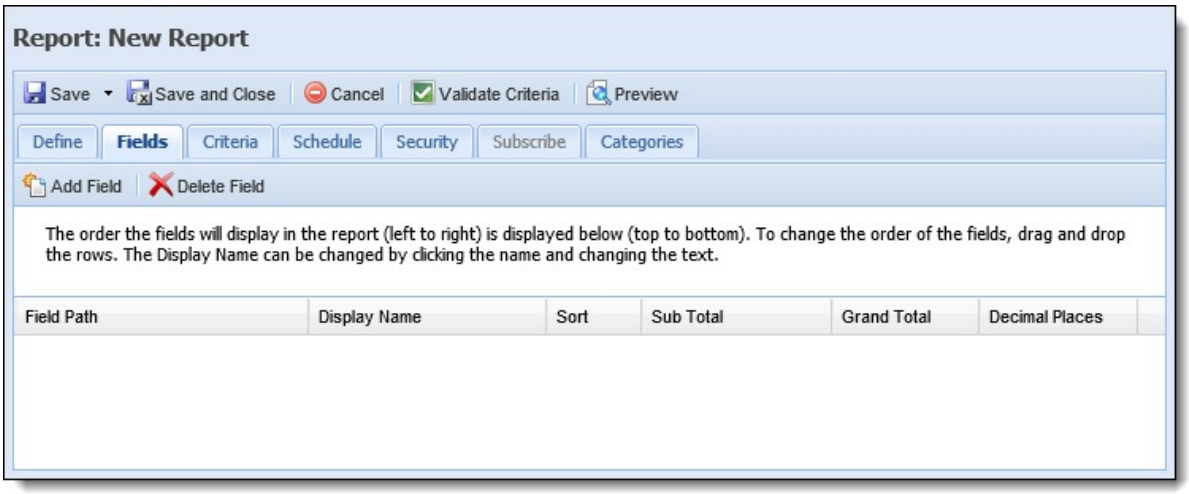
Creating a Report

To create a report:

- Click Create within the Reports page.
- The New Report screen appears. Complete all attributes within the Define tab.
- Once all Define attributes have been entered, navigate to the Fields tab and perform one of the following actions:

  ▶ Add Field

  - To add a field, click Add Field.



  - The field list displays.

> The field list that displays is dependent on the Report Type selected in the Define tab.

> If the Workflow/Comment Report Type is selected on the Define tab, an Account folder and a Person folder display in the field list, both containing person information. The fields in the Person folder pertain to the person on which the workflow was run. Because a workflow/comment is always tied to a person, and may be tied to one or more accounts and/or a case, the Report may display multiple rows for the same workflow/comment depending on the combination of Account, Person Case fields chosen. More information on the Field List can be found below.

The field list is a feature used throughout Temenos Infinity to define the fields to display on reports, views, and exports. It is also used in criteria building for reports, views, exports, and searches.

Each field selector window looks the same regardless of how it is accessed. In the below example, the field selector has been accessed through the Fields tab when creating a new report.

By default, the field selector opens in a tree format with expandable folders and sub-folders.

Field Tree

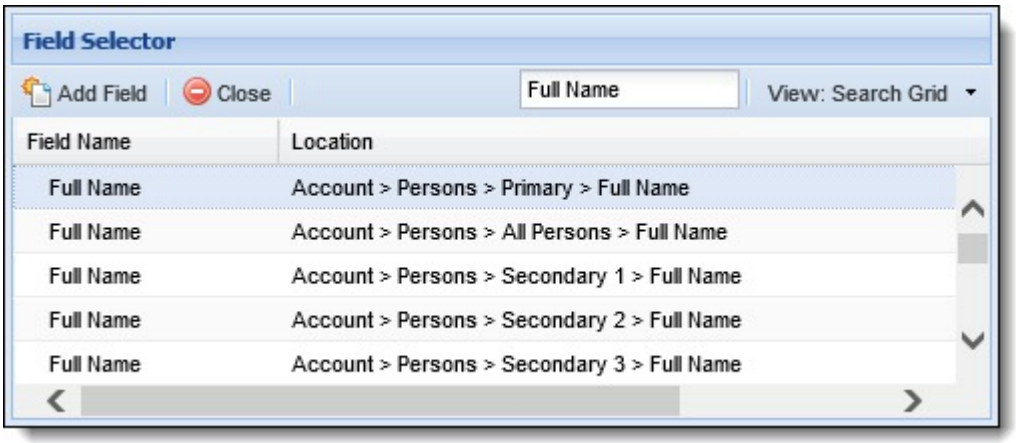
When using the Field Tree format, click the arrow next to the field name to expand or collapse the list of available fields. Expand each section until the desired field is found, or search for the field by entering text into the search text box, and hitting **Enter** on the keyboard.

Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

Search Grid

To change the view of the field selector from a tree to a search grid format, click the **View** drop-down in the top of the field selector window, and select **Search Grid**.

Using the Search functionality, locate the desired field by entering text into the text box, and hitting **Enter** on the keyboard. A list of results displays including the field name and location in Temenos Infinity.



Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

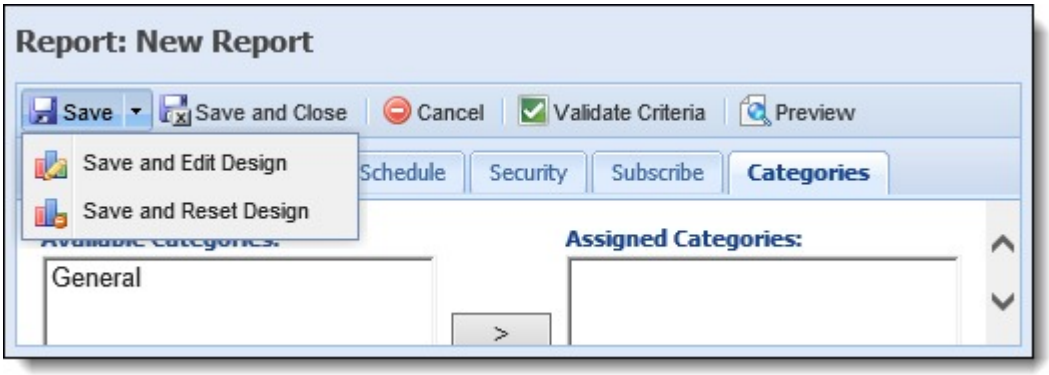
- After fields have been added, the order the fields appear can be rearranged by clicking and dragging fields to their desired position. Certain field properties may also be edited by clicking within the columns.

Delete Field

- To delete a field, highlight the field within the grid on the Fields tab and click Delete Field.
- The field is automatically removed from the grid.

- When all fields have been added, define the report criteria within the Criteria tab.
- After the report criteria has been defined, navigate to the Schedule tab to determine a schedule for when the report is to be run.
- Once a schedule has been set, assign users and/or groups access to the report from the Security tab.
- If Based on a schedule was selected in the Schedule tab, and the report has been configured to deliver to an email address, navigate to the Subscribe tab and enter the email address(es) to receive the report results.
- If desired, assign categories access to the report from the Categories tab.
- Upon completion of all report attributes, system administrators have the option to use the following functions provided within the Reports page:

  - When building a standard report and setting the criteria, click the **Save** drop-down, and select **Save and Edit Design** or **Save and Reset Design** to retain the report settings and use the Advanced Report Builder.



  - Validate the report criteria before running or previewing the report by clicking Validate Criteria.
  - Preview the new report by clicking Preview. This feature is only available when the report is saved for the first time.

- When finished all report configurations, click Save or Save and Close to create the new report and return to the Reports page.

> If a report is configured to run based on a schedule, and deliver to a Windows File Share location, report server credentials must be defined for the institution within the General tab in Administrative Settings. If a username, password, and/or default file path has not been defined, an error is received when trying to save the report configurations. For more information, please see the General section of the Administrative Settings topic in this guide.

- The new report populates within the grid in the Reports page and can be run/accessed by all users with appropriate permissions.

Copying a Report

To copy a report

- Highlight the desired report within the Reports grid, and click Copy.
- The Copy Report screen appears.
- Navigate through the tabs and make any necessary changes to the report.
- When finished, click Save or Save and Close to retain all changes and finalize creation of the new report.

Editing a Report

To edit a report:

- Highlight the desired report within the Reports grid, and click Edit.
- The Edit Report screen appears.
- Navigate through the tabs and make any necessary changes to the report.

> If changes are made to the report Fields or Criteria, select **Save and Edit Design** or **Save and Reset Design** within the Save drop-down to overwrite the report's previous design.

- When finished, click Save or Save and Close to retain the changes and return to the Reports page.

Deleting a Report

- To delete a report, highlight the desired report within the Reports grid and click Delete.
- A confirmation message appears. Click **Yes** to delete the report or **No** to return to the Reports page without deleting.

Advanced Report Builder Help

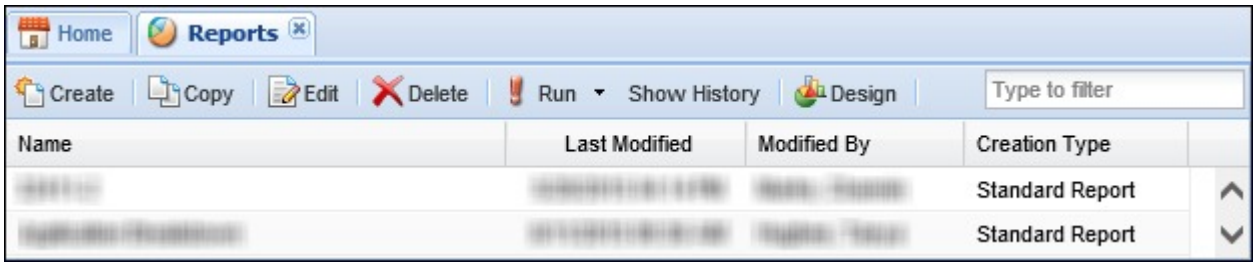
The Report Builder functionality provides extensive capabilities for report creation with the use of Microsoft Reporting Services Report Builder. Using Report Builder allows the system administrator the ability to modify the appearance of results from Temenos Infinity's basic report functionality. This provides institutions with the transparency and visibility to present a visually appealing snapshot of data that supports and emphasizes key data points. Other capabilities include:

- Summarization of data
- Graphs and Charts for data visualization
- Calculations and expressions of data within or across accounts that may not be available
- Incorporating sub-reports to demonstrate a chart and table within the same report
- Joining tables that are not currently related to one another

Prior to using the Report Designer functionality, review the Reports section in the System Administrator guide to get a basic understanding of the Report feature. The report builder can be used in variety ways, such as:

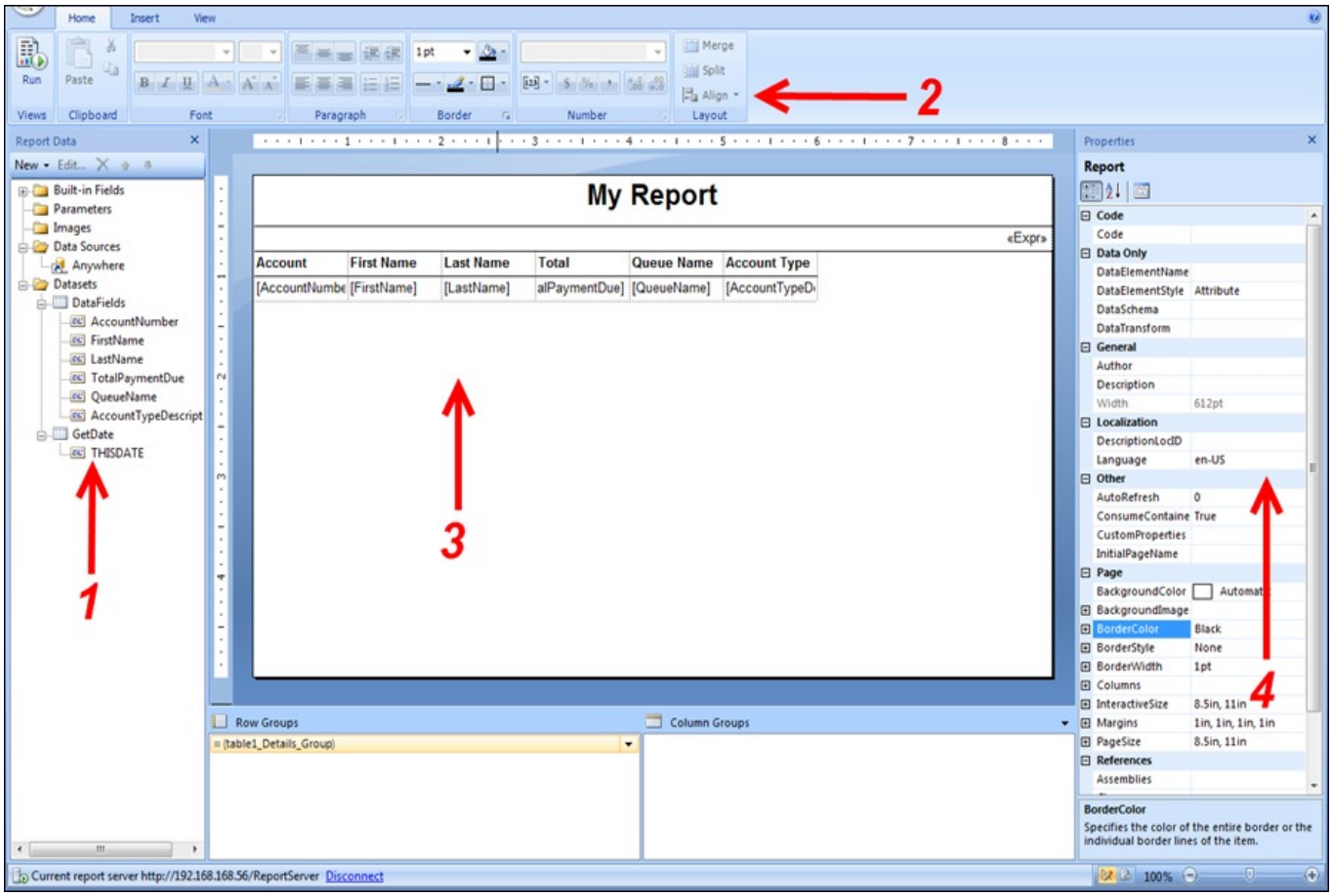
- Start with a Standard Report and build the report in Temenos Infinity as it is normally done. Add in desired fields and necessary criteria. From there, use the Report Builder to modify how the results look.
- Start from scratch and create a new report, and specify that it should be an Advanced Report.
- Copy a predefined report. With the Report Builder, users are able to modify the canned reports.

The Report Builder can be launched from the Report Window by selecting Design.



Report Builder Navigation

When the report builder is launched, the design surface displays. The design surface is used to view and manipulate the layout of the report and is broken out into four main sections.



The following table provides an overview of each section of the design surface:

Design Surface Section	Description
1 - Report Data	Displays information about what fields are being used and the connection to the data source.
2 - Home/Insert/View tabs	Provides the ability to format text, insert other design parts, or change which parts of the Design Surface are displayed.
3 - Design Surface Area	Provides the ability to set up reports.
4 - Properties	Provides the ability to modify parts of a table such as spacing, borders, or background colors.

Reference the following list for an overview of tips to consider when creating a parameter in the Report Builder:

- Avoid having both an underscore and last character in the Name.
- For vendor reports, the Vendor Id parameter Name and Prompt must be "VendorId."

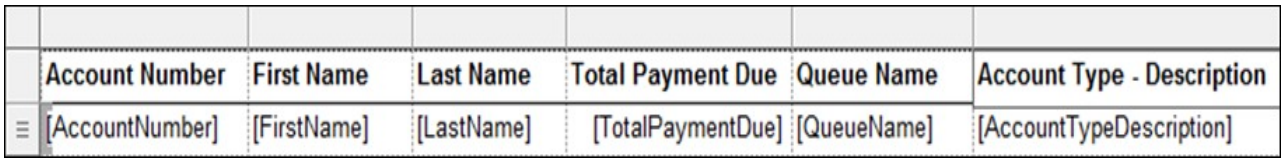
Report Builder – Getting Totals

Locate the report in the Report listing page that is used with the Report Builder and click **Design**.

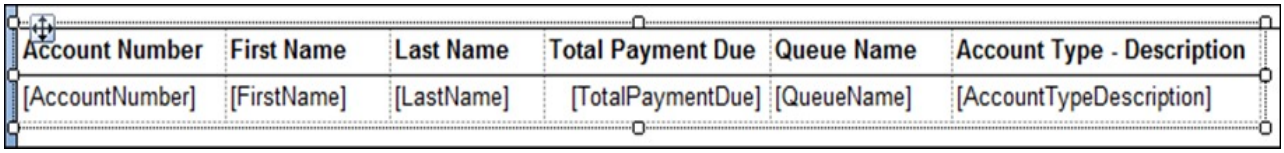
The selected Report displays in the Design Surface. The report fields and criteria are already set, and the layout displayed can be deleted and a new table can be inserted.

To delete the layout of the report:

- Click anywhere in the table in the Design Surface and a bar appears across the top and down the left side of the table. These bars represent the columns and rows of the table.



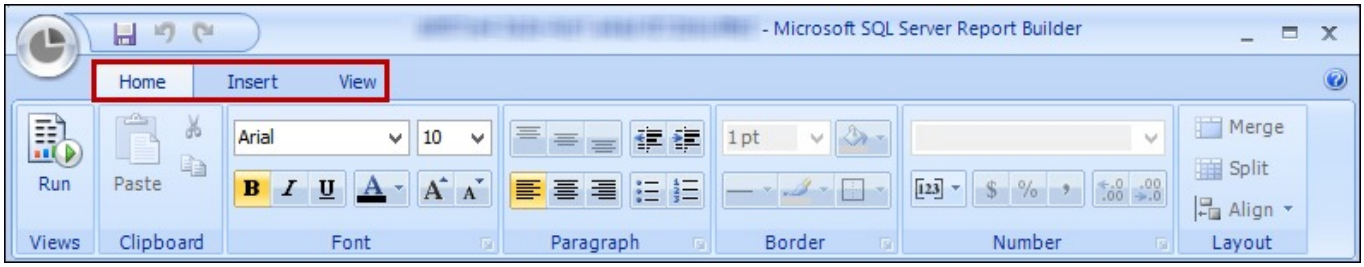
- Clicking on the box in the top left corner selects the entire table.



- Click **Delete** to clear the Design Surface.

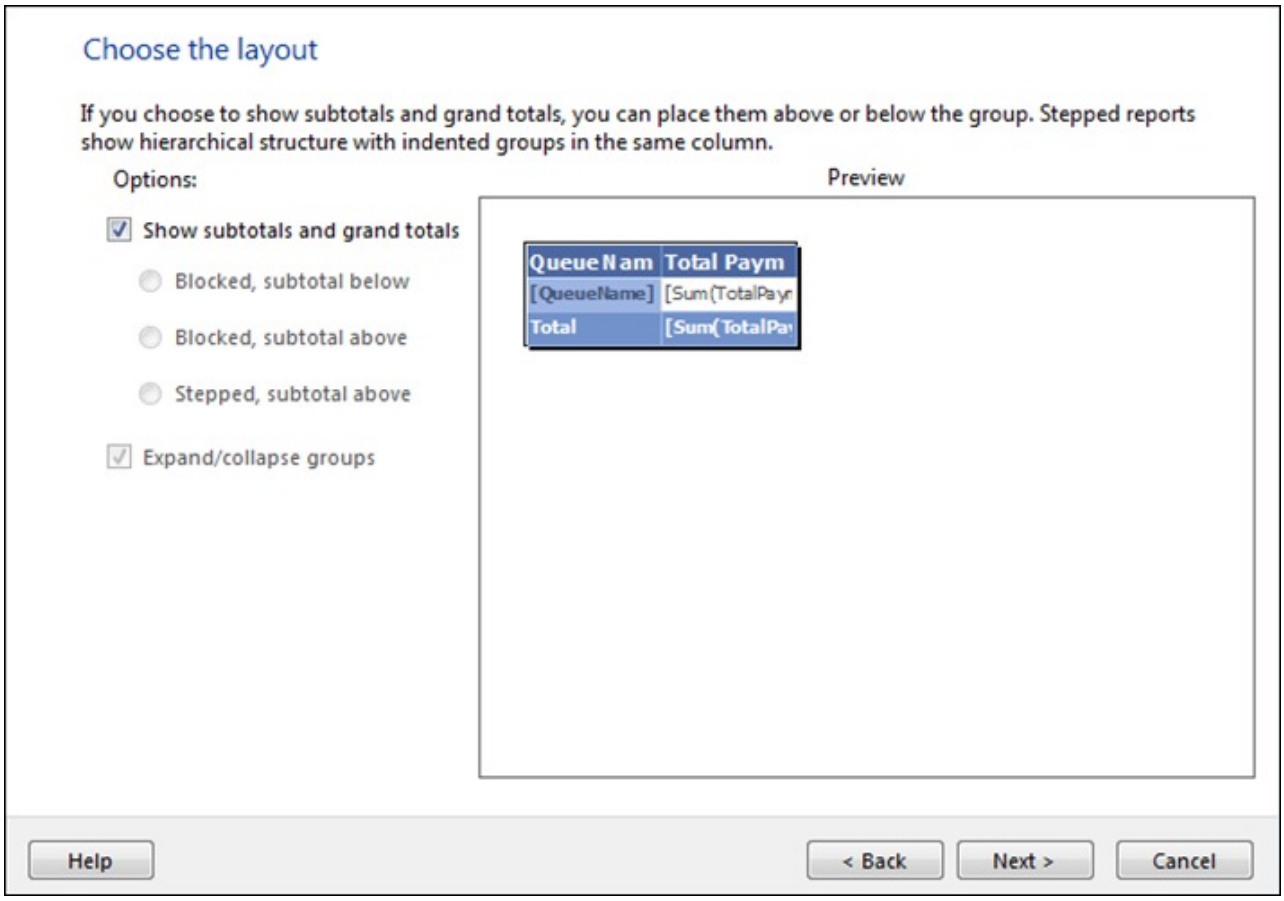
At the top of the Report Builder there are three tabs:

- Home – Run the report or modify the formatting of the report.
- Insert – Select how the data displays (table, chart, etc.).
- View – Select the portions of the design page to be displayed.

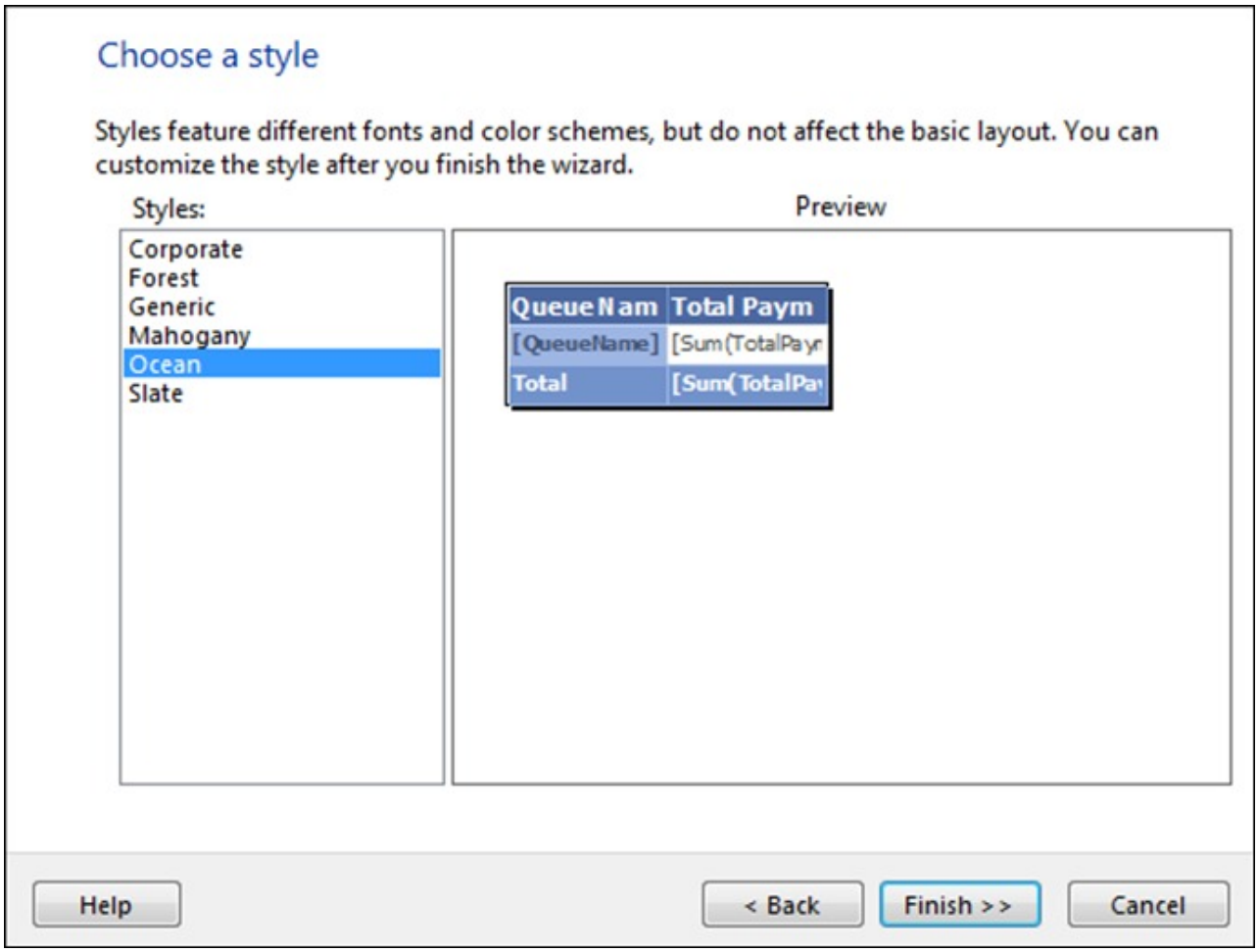


To add a new layout:

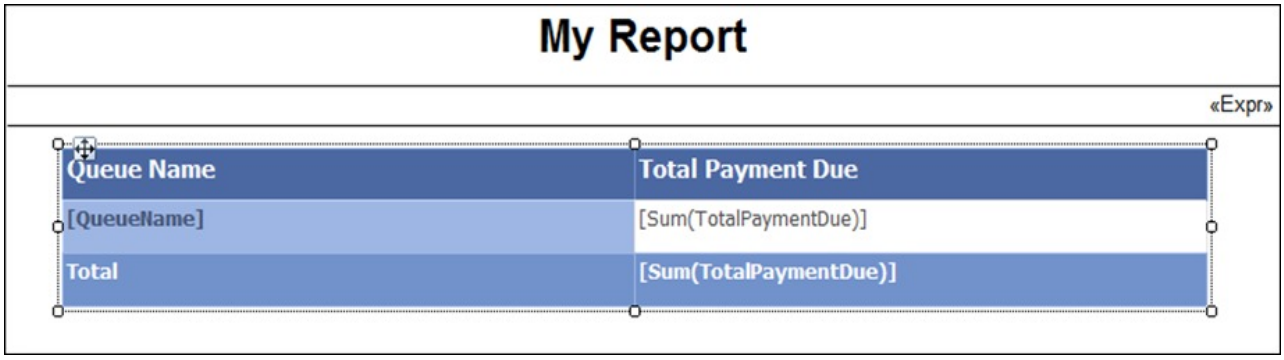
- Click Insert > Table > Table Wizard.
- Select a Dataset. Choose an existing dataset in this report is set by default. The DataFields dataset displays the fields that were chosen in the Report Writer.
- Click **Next**.
- The Arrange Fields screen displays. Drag Available fields to the desired rows/groups/values section.
    - Row Groups – The fields listed down the left side of the table.
    - Column Groups – The fields listed in the columns.
- Values – Define the values.
- Click **Next**.
- Select the layout of the report. Depending on the selection made in the prior set may pre-set the layout (i.e. Choosing to sum the Balance the layout is pre-set to show subtotals and grand totals).



- Click **Next**.
- Select the style for the report. Changing the style does not affect the layout; it only changes the fonts and color scheme of the results.



- Click **Finish**. The table displays in the Design Surface and is now ready to be used. Clicking the control at the top left corner of the table allows users to re-position the table and resize the table.



Click **Run** to view the results. Adjust the column headers using the **Design** tab to display the column and field results in the correct format (currency).

My Report

Tuesday, June 12, 2012

Queue Name	Total Payment Due
Delinquent Loans - A to F	40640.3300
Delinquent Loans - M to R	88969.7300
Delinquent Loans - S to Z	83340.1100
Total	212950.1700

Click **Run** to view the updated results.

My Report

Tuesday, June 12, 2012

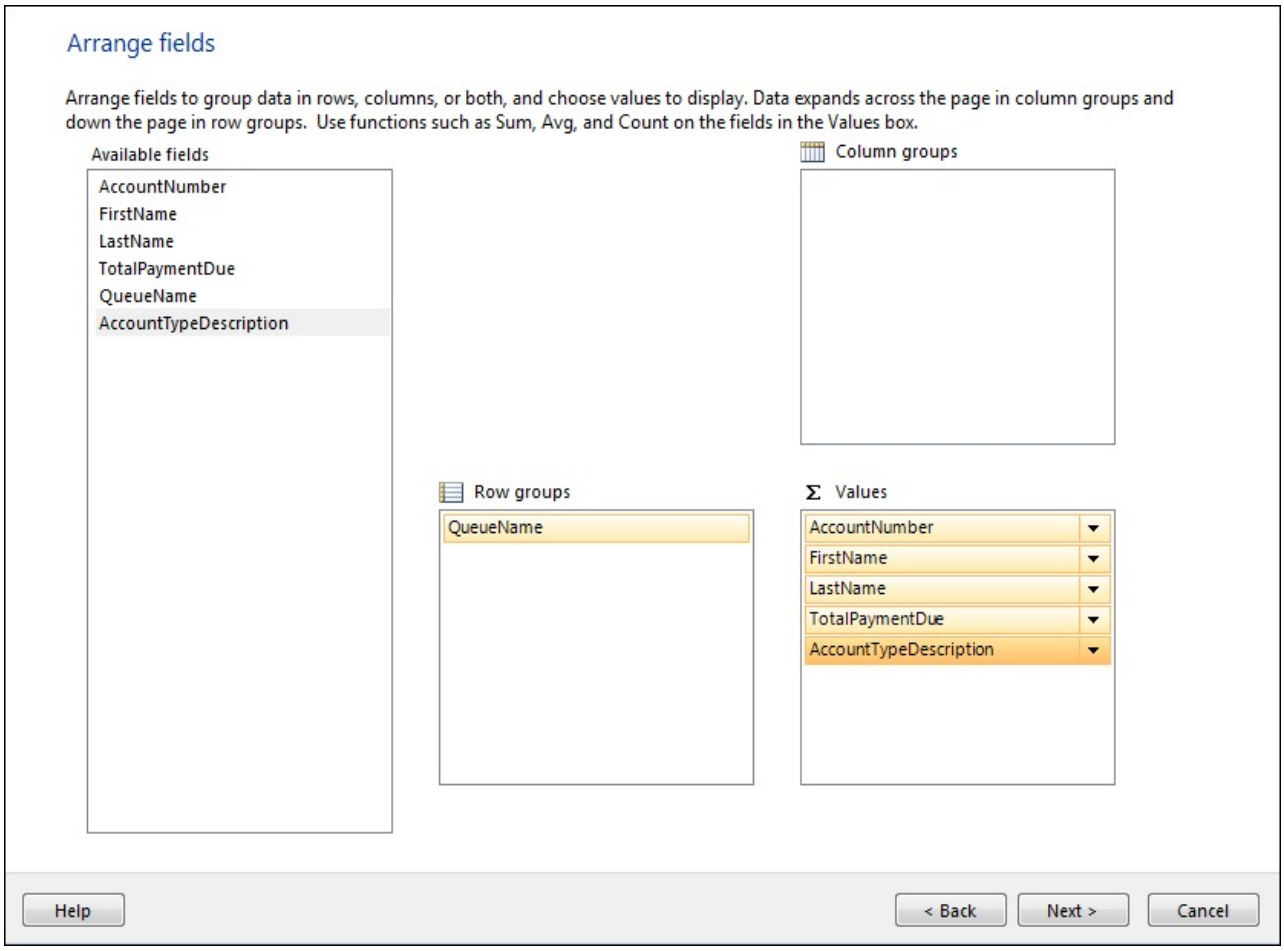
Queue Name	Total Payment Due
Delinquent Loans - A to F	$40,640.33
Delinquent Loans - M to R	$88,969.73
Delinquent Loans - S to Z	$83,340.11
Total	$212,950.17

The Report Builder – Expandable Groups

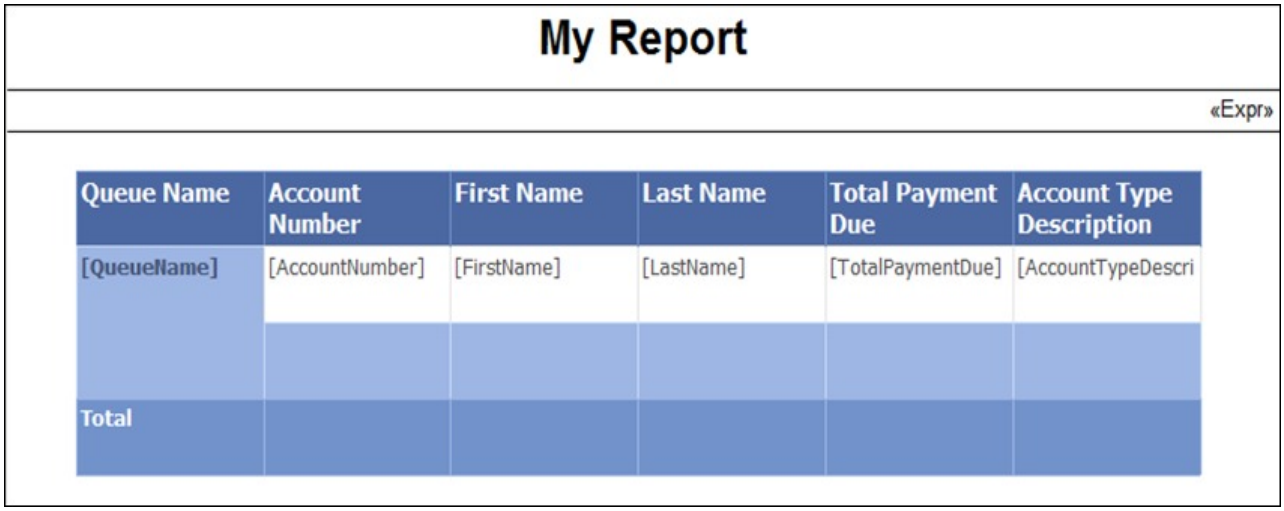
Expandable groups allow users to expand groups to view more information contained therein.

- Click **Design**.
- Select the entire table, and delete the table.
- Select Insert > Table > Table Wizard.
- Select the DataFields dataset.
- Select an Available Field to add to the Row Groups window.
- Add fields to be displayed in the group to the Values section.

> Do not make any changes in the Values box with regards to Sum, Count, etc.



- Click **Next** and complete the remaining sections.



- Click the **Run** button from the Home tab. The groupings display.

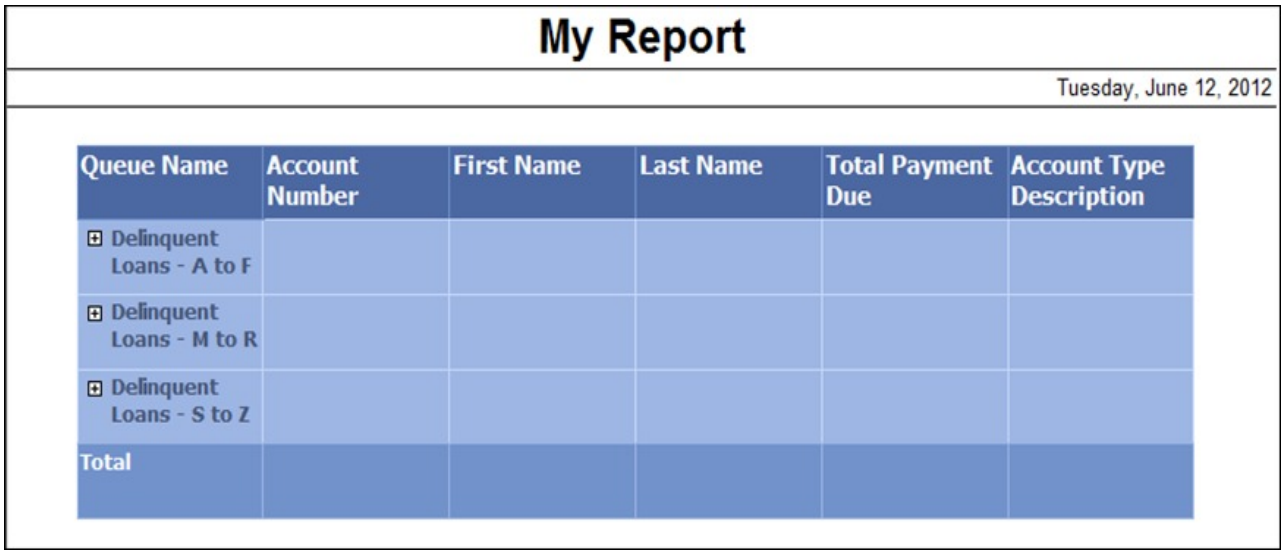


Table formatting can be modified in the **Design** tab.

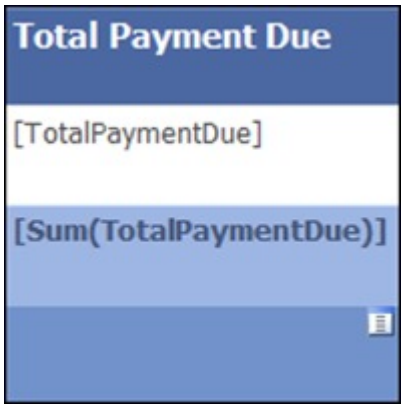
To modify the report to display subtotals follow the below steps for the desired fields:

- Hover over the light blue row right below the field for which the subtotal should display. When the field chooser appears, click on it and select the field name.

- Click on the Field so that the text appears yellow and the field is highlighted brown.

- Right click in the field, choose Summarize By > Count. The field is then displayed as [Count (AccountNumber)].

- Repeat the exact same process to calculate the Sum, but instead of doing a Summarize By > Count, choose Summarize By > Sum.



- Click **Run** to view results.

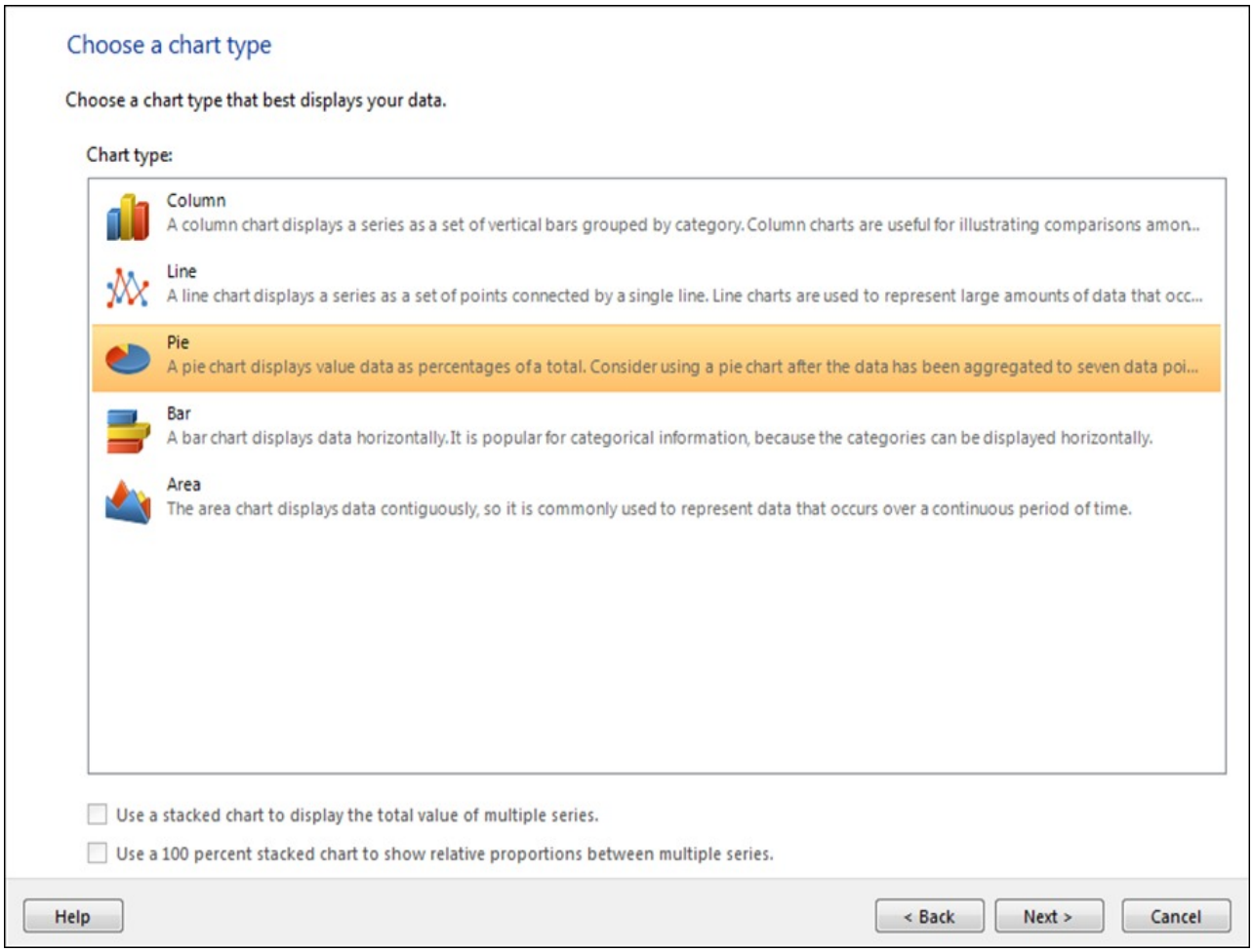
My Report

Tuesday, June 12, 2012

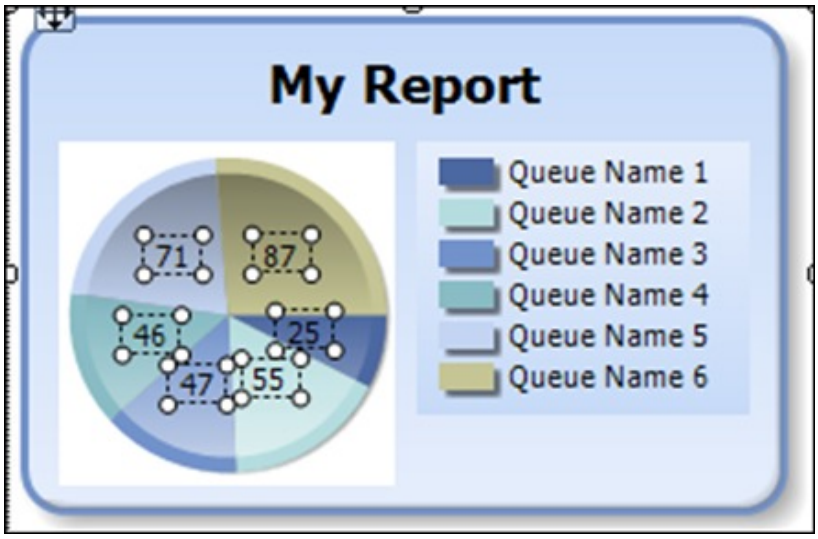
Queue Name	Account Number	First Name	Last Name	Total Payment Due	Account Type Description
⊞ Delinquent Loans - A to F	69			40640.3300	
⊟ Delinquent Loans - M to R	100133	JOHN	RICHARD	965.0000	Mortgage
	100138	VINCENT	RIZZO	9256.2500	Mortgage
	100167	MOIRA	MEEHAN	95.0000	Credit Card
	100170	OFELIA	MIRO	635.0000	Credit Card
	100184	STEVE	RIGGS	150.0000	Auto
	100191	BONNIE	O'REILLY	600.0000	Auto
	100215	BETTY	RYAN	250.0000	Auto
	110112	OFELIA	MIRO	875.3200	Mortgage
	123456	ken	peternana		Mortgage
	123876	vinnette	powers		Mortgage
	10Y0030856224	Rose	Paninski		Mortgage
	4963B	BARRY	NOORDA		Auto
	2222A	WESLEY	PASKETT		Auto
	100248	ANDREW	ORGILO	1050.0000	Secured
	100254	HAROLD	OSTERGAARD	185.0000	Secured
	100266	MCKNIGHT	MCKNIGHT	310.0000	Unsecured
	100267	MCNICKOL	MCNICKOL	1250.0000	Unsecured
	100270	ODGEN	ODGEN	199.6500	Unsecured

The Report Builder – Creating a Chart

- Adding Charts to a report allows users to represent things visually.
- To add a chart select the Design tab.
- Select Insert > Chart > Chart Wizard.
- Click **Next** through the dataset.
- Select the type of chart and click **Next**.

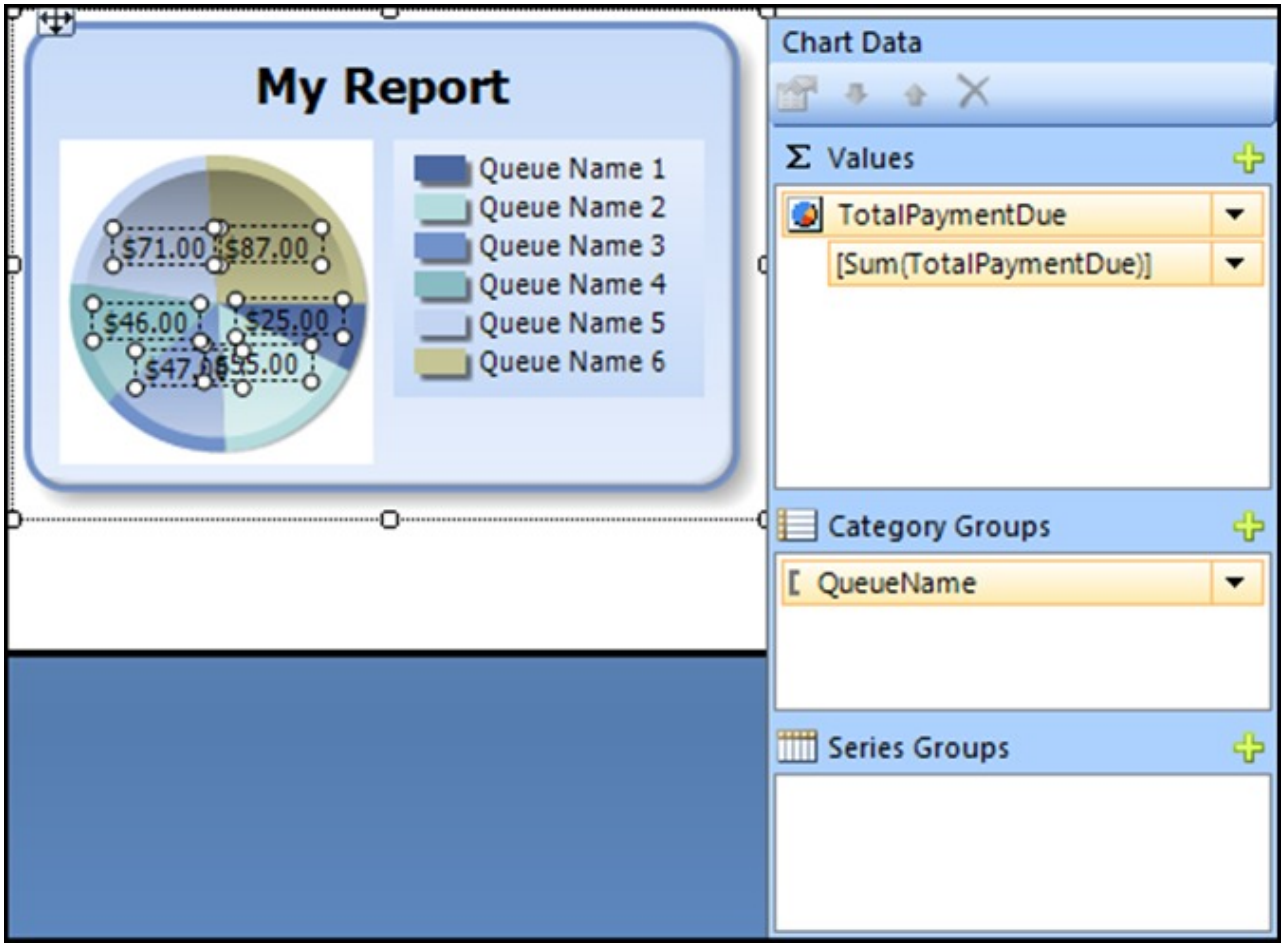


- Complete the Arrange Chart Fields step.
- Select **Next**.
- Select the Style.
- Click **Finish**.
- Relocate the pie chart design on the design surface.
- Click on the Chart Title and type in a title.
- Right-click anywhere on the chart and choose **Show Data Labels**.

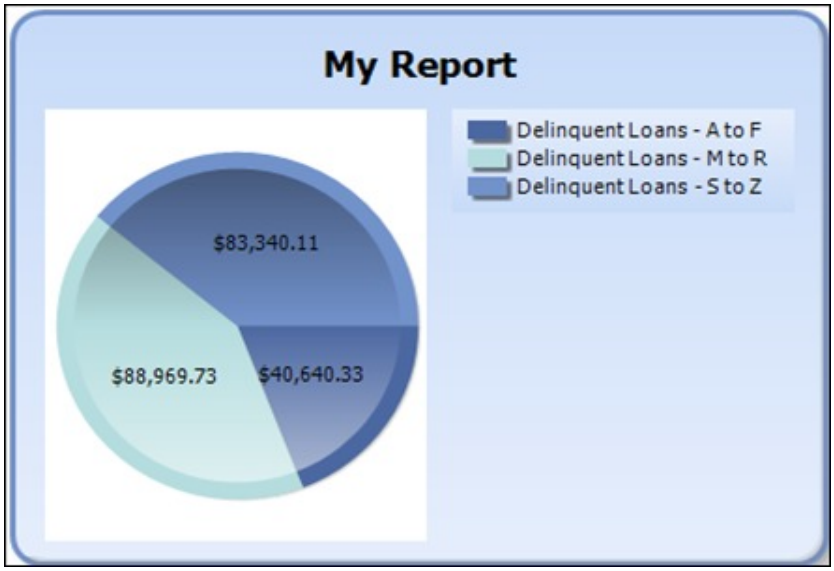


- With each segment of the pie chart selected (as shown above), go to the Home tab and choose the format

for these fields.



- **Run** the report. Adjust the size if needed.



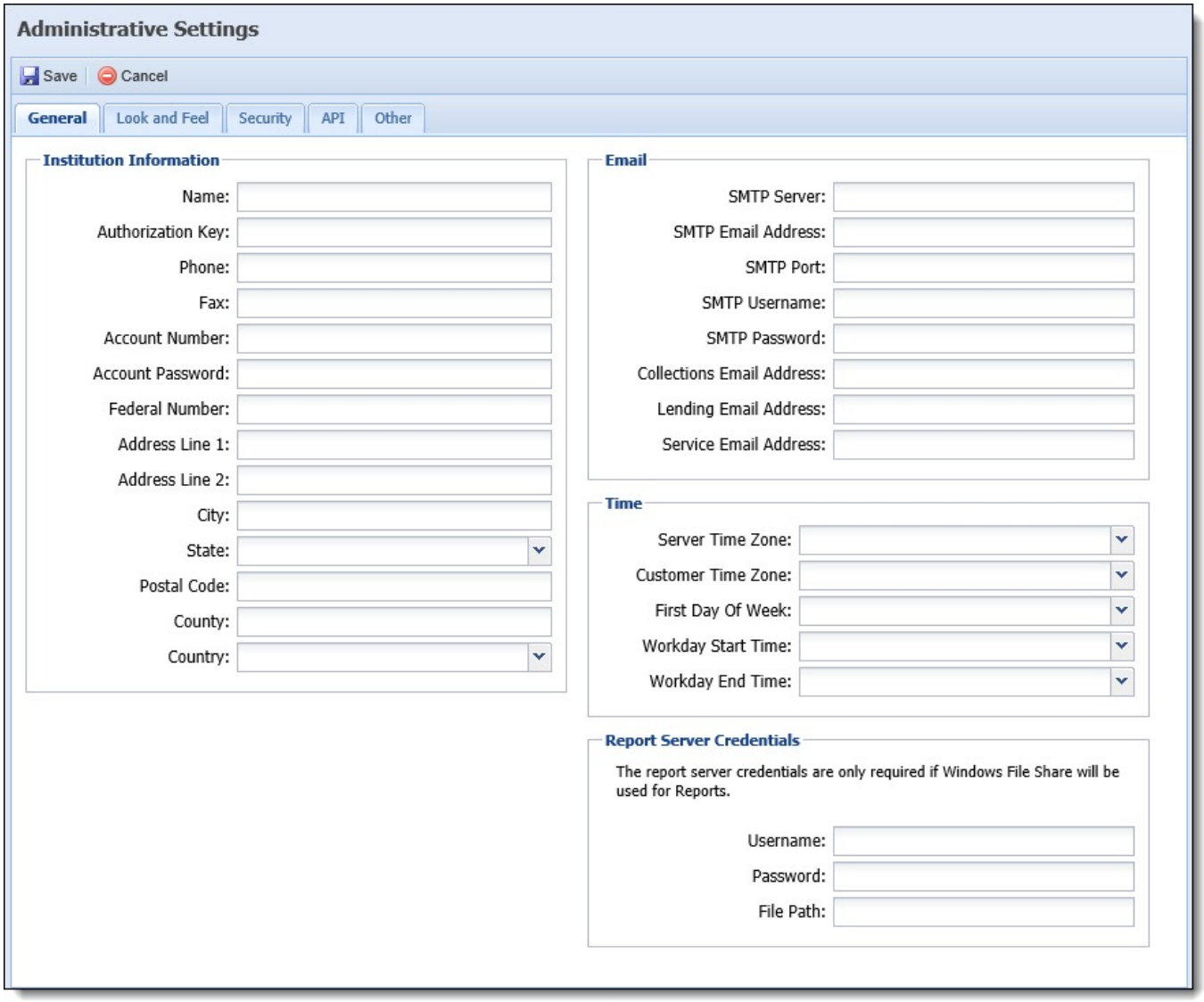
Administrative Settings

The Administrative Settings page allows for the customization of general Temenos Infinity features, such as password settings, account settings, and institution settings. This page can be acessed from System Management >

Administrative Settings, and includes the following tabs:

- General
- Look and Feel
- Security
- API
- Other

General



The General tab includes the following fields:

Fields	Description
Institution Information	
Institution Name	Name of the financial institution.
Authorization Key	The Authorization Key of the financial institution.
Phone and Fax Number	Phone and fax number of the financial institution.

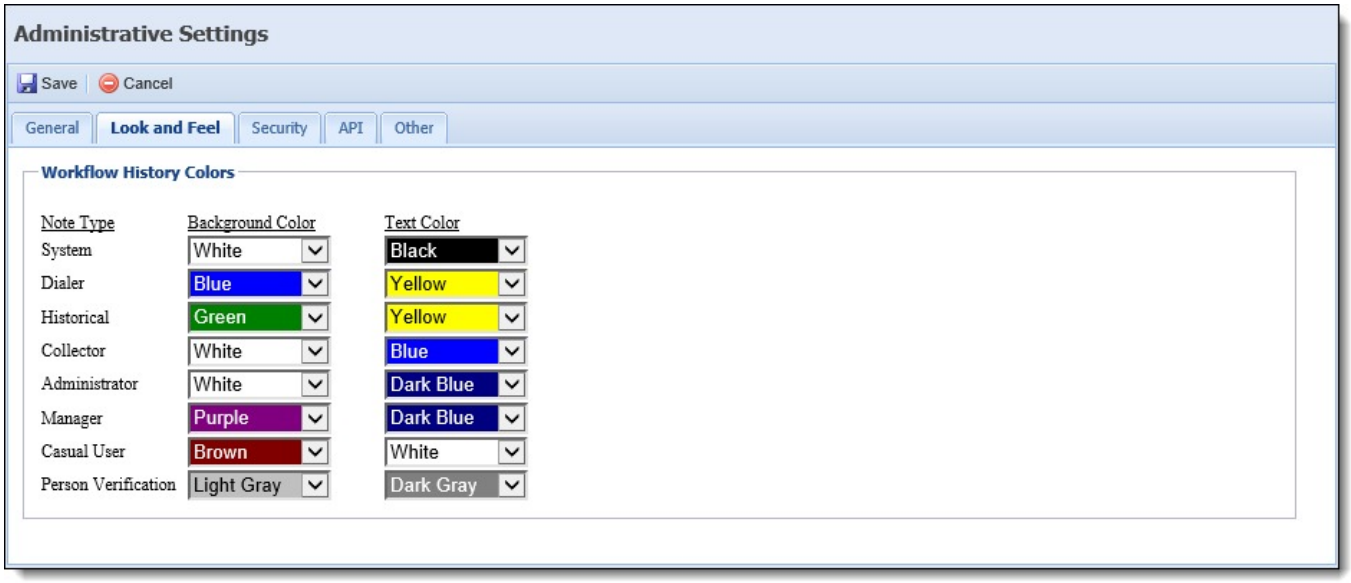
Account Number	Only used if specific third party connectors are used.
Account Password	Only used if specific third party connectors are used.
Federal Number	The federal identification number of the financial institution.
Address Information	Address information of the financial institution.
Email	
SMTP Server	Specify the name of the email server used to route emails from the application.
SMTP Email Address	Specify the email address that submits the email to the server. The email address entered in this parameter transmits the email to the recipient, on behalf of the sender. For example, the recipient will see the message sent by sent on behalf of <Collections Email Address>. If it is desired to send the system email on behalf of an email address other than the one entered in this parameter, the configuration must made on the institution's mail server. If a value is provided within the SMTP Port, Username, or Password parameters, this field is required.
SMTP Port	Specify the port number to be used to transmit the email via the SMTP server. If a value is provided within the SMTP Email Address, Username, or Password parameters, this field is required.
SMTP Username	Specify the authentication user name for the SMTP Server. If a value is provided within the SMTP Email Address, Port, or Password parameters, this field is required.
SMTP Password	Specify the password associated with the user name for the SMTP Server. If a value is provided within the SMTP Email Address, Port, or Username parameters, this field is required.
Collections Email Address	Specify the email address that serves as the "from" address for all system emails within the Collection module. This field must be completed in order to email account holders from Temenos Infinity, or have scheduled reports emailed to individuals.
Lending Email Address	Specify the email address that serves as the "from" address for all system emails within the Origination module. This field must be completed in order to email account holders from Temenos Infinity, or have scheduled reports emailed to individuals.

Service Email Address	Specify the email address that serves as the "from" address for all system emails within the Service module. This field must be completed in order to email account holders from Temenos Infinity, or have scheduled reports emailed to individuals.
Time	
Server Time Zone	Select the time zone in which the server resides.
Customer Time Zone	Select the time zone of the financial institution.
First Day of Week	Select the first day of the week. These time settings ensure appropriate times are used throughout Temenos Infinity.
Workday Start Time	Select the default workday start time for the financial institution.
Workday End Time	Select the default workday end time for the financial institution.
Report Server Credentials	
The following credentials are determined by the institution's IT department, and are required to deliver Temenos reports to a file share location. The Reporting Services server must have access to the file locations where generated reports are being stored. This applies to the default file path defined in this section, as well as the locations defined at the report level. It is the responsibility of the institution's IT department to create the general account used to access those locations. The following credentials are used to provide a Temenos user with access to create a subscription for reports being exported to a Windows file share location from the Reports page in the Ribbon Bar.	
Username	Enter the Windows username for the user configured to access the file share location in the following format: DOMAIN NAME\username. This field accepts up to 50 characters. It is recommended to create a separate Admin user for Reporting Services, and not use the credentials for a general Temenos user.
Password	Enter the password for the Windows user. This field accepts up to 125 characters. If the password is entered incorrectly, there are no errors or prompts to alert the user, and the report is not generated on the share drive.

File Path	Enter the default location where reports configured to deliver to a Windows File Share are exported. This is the file path location where a report is exported if a path is not defined as part of the Windows File Share Configurations for the report. If desired, a file path can be defined at the individual report level for the export within the Schedule tab of the Report configuration window. For more information, please see the Schedule section of the Reports Administration topic in this guide. The file path location must begin with "\\" in order to conform to the Uniform Naming Convention (UNC) format. If "\\" does not appear in the beginning of the file path, an error is received upon saving the Administrative Settings page. A folder must be created in the file path location by the institution, prior to the report(s) being delivered.

Look and Feel

The Look and Feel tab allows administrators to configure the background and text color within the Workflow History screen. This feature allows users and administrators to distinguish what users ran the respective workflows.



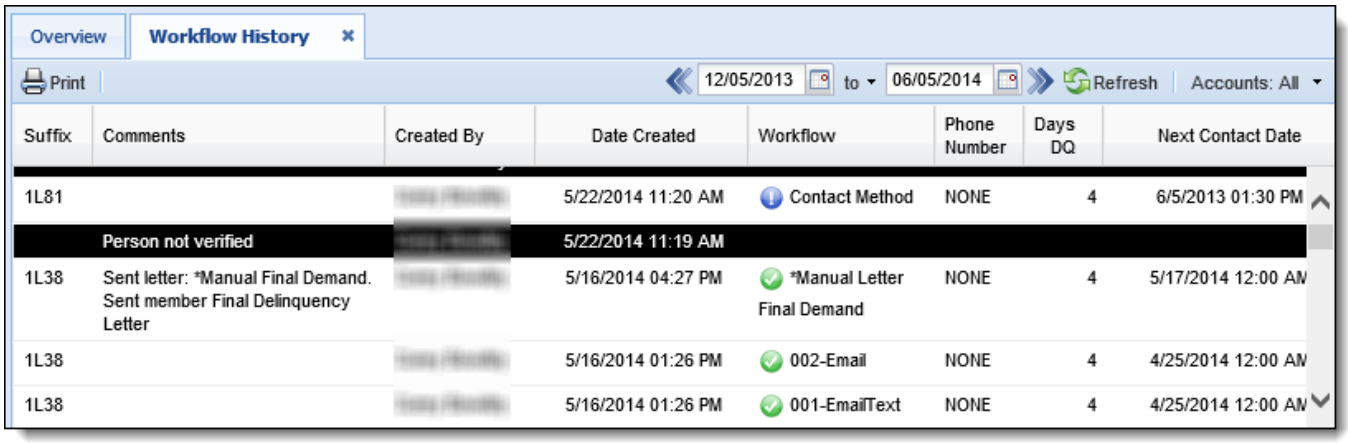
Workflow History Colors can be assigned for the following note types:

Note Type	Description
System	Comment was added to an account holder by the system.
Dialer	Comment was added to an account holder by a dialer.
Historical	Comment was added to an account holder through a historical notes import.
Collector	Comment was added to an account holder by a collector.
Administrator	Comment was added to an account holder by an administrator.

Manager	Comment was added to an account holder by a manager.
Casual User	Comment was added to an account holder by a user that only has access to view workspaces and place comments.
Person Verification	Comment was added to an account holder via the person verification feature.

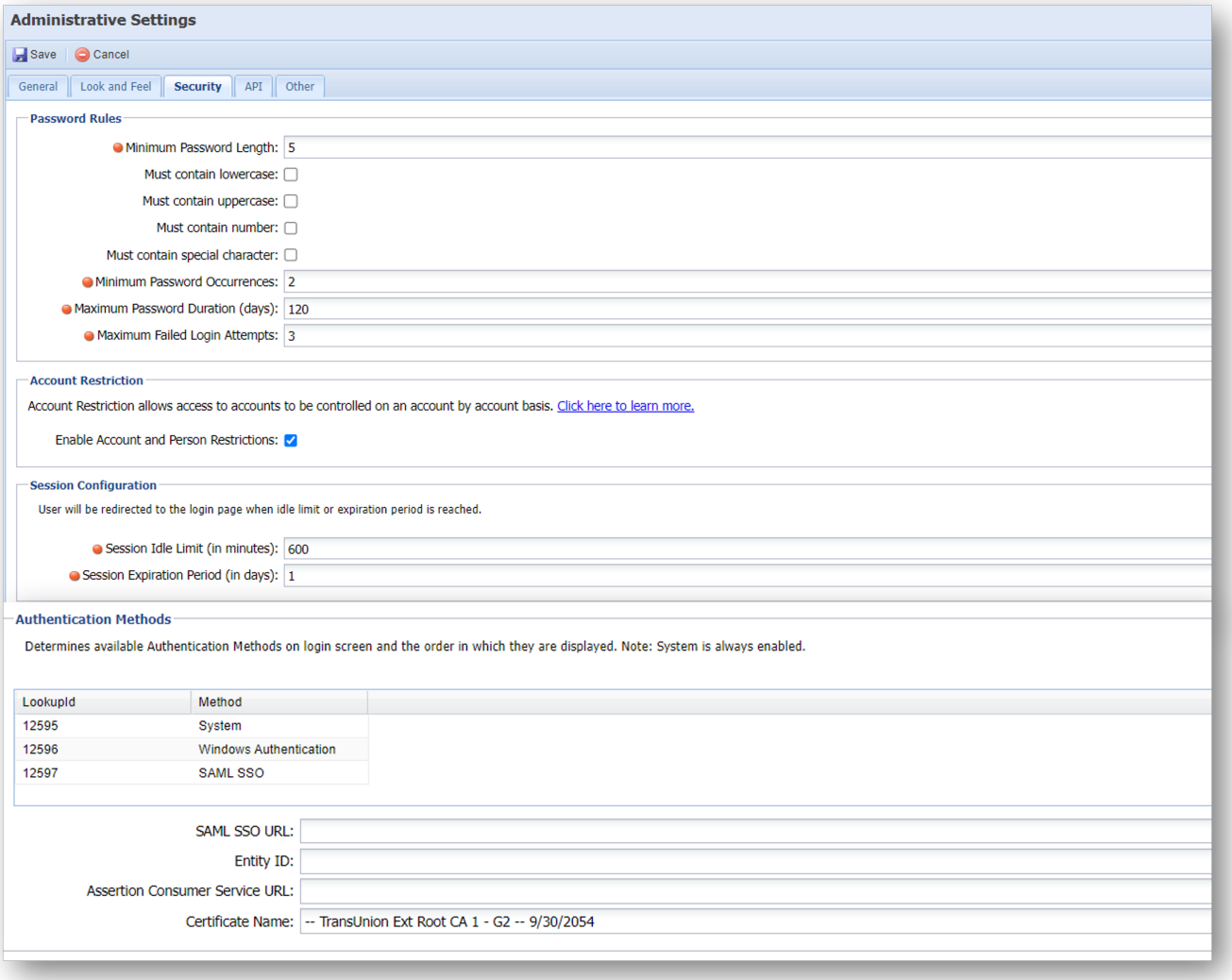
Users are assigned to user types in System Management > Users.

For example, if an administrator runs a workflow and his background color is set to white and text color to black and the person verification background is set to black and the text white, an account's Workflow History screen looks like this:



Security

The Security tab allows administrators to set password rules and account restrictions.



From this screen, administrators can determine the following settings:

Field	Description
Password Rules: Allows administrators to determine the complexity of user passwords	
Minimum Password Length	Allows the administrator to determine the minimum number of characters (letters, numbers, and special characters) a user password must contain. This is a required field.
Must contain lowercase	Allows the administrator to determine whether a user password must contain a lowercase letter.
Must contain uppercase	Allows the administrator to determine whether a user password must contain an uppercase letter.
Must contain number	Allows the administrator to determine whether a user password must contain a number.
Must contain special character	Allows the administrator to determine whether a user password must contain a special character.

Minimum Password Occurrences	Allows the administrator to determine how many new passwords must occur before a password can be reused. This is a required field.
Maximum Password Duration (days)	Allows the administrator to determine after how many days a user must change her/his password. This is a required field.
Maximum Failed Login Attempts	Allows the administrator to determine after how many failed login attempts a user account gets locked out. This is a required field.
Account Restrictions	
Enable Account and Person Restrictions	If account restriction is enabled, a user must be given the appropriate permissions in order to view restricted accounts. If restricted persons is enabled, it prevents a user from gaining access to a person's workspace. For more information on this setting, select the **click here to learn more** link within the Administrative Setting's Security tab.
Session Configuration	
Session Idle Limit (in minutes)	Allows the administrator to determine after how many minutes of inactivity a user is logged out. This is a required field. The minimum value for this parameter is 1. The maximum value is 1440. The default value for this parameter is 60 (one hour) for new clients. The default value for this parameter is 1440 (one day) for upgrading clients.
Session Expiration Period (in days)	Allows the administrator to determine after how many days a user account is logged out; regardless of activity. The minimum value for this parameter is 1. The maximum value is 5. The default value for this parameter is 1 (one day) for both new and upgrading clients.
Authentication Methods	
System	Selecting the check box allows the administrator to determine if the user can access the application using the credentials set up in the system.

Windows Authentcation	Selecting the check box allows the administrator to determine if the user can access the application using the Windows Authentication method.
SAML SSO	Selecting the check box allows the administrator to determine if the user can access the application using the SAML SSO method. The following fields also appear when this check box is selected: • SAML SSO URL - Enter the URL for the SAML SSO identity provider. • Entity ID - Enter the ID of SAML SSO service provider. • Assertion Consumer Service URL - Enter the destination URL, to which the identity provider sends assertions to the service provider. • Certificate Name - Enter the name of the SAML X509 Certificate, obtained from the Certificate Store. To activate SAML SSO please contact Temenos customer support for assistance.

If the administrator changes Password rules, existing users are not prompted to adhere to these changes until the next time they change their password. The changes immediately apply to new users.

API

The web service allows customers to integrate their own internal applications to perform general tasks in Temenos Infinity.

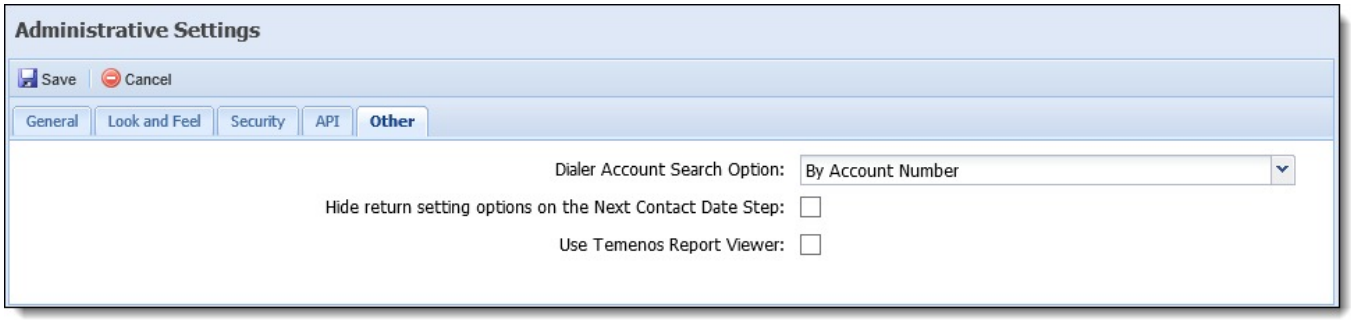
- Customer applications have read/write access to Persons, Accounts, and Cases within Temenos Infinity through any external API. Actions such as posting a comment to an account, retrieving comments on an account, initiating a workflow on an account, creating a promise on an account, or changing the next contact date on an account may be performed.
- All requests must include the Authorization Key, which is generated and stored under API on the Administrative Settings page.
- Set the Authorization Key or Generate New Key.

When using the open system feature within a workflow frame, it should be used for navigating the user to internal web applications. Linking to external websites with pop-ups could kick the user out of Temenos Infinity and end their session.

If a System Integration workflow step is added as a part of a workflow, and the target URL does not support iFrame rendering, a message displays stating, "This content cannot be displayed in a frame." This is not an error with Temenos Infinity, but rather a limitation of the website attempting to launch. To continue to the configured website, click the "Open this content in a new window" link.

Other

The Other Tab allows administrators to configure additional settings for Temenos Infinity. These settings include Dialer Account Search Option, Hide return setting options on the Next Contact Date Step, and Use Temenos Report Viewer.



Specify the **Dialer Account Search** Option to be by account identifier, account ID, or account number. This controls how accounts sent to a dialer can be searched for in Temenos Infinity.

Check the **Hide return setting options on the Next Contact Date Step** check box to prevent an administrator from configuring a workflow to allow a user to set a return to status after running the Next Contact Date workflow step. If this option is enabled, users have the ability to select one of the following options from a drop-down when running the Next Contact Date workflow step.

- Return to me in the queue
- Return to me in any queue
- Return to anyone in the queue
- Return to anyone in any queue

> Temenos recommends having this option hidden. Accounts are then presented to anyone in the queue and are not available to all end users.

Check the **Use Temenos Report Viewer** check box to activate the Temenos Report Viewer. If enabled, reports run in Temenos Infinity are displayed using the Temenos Report Viewer and have a slightly different format than reports not rendered with the Temenos Report Viewer. If this option is not selected, reports still generate in Temenos Infinity. This setting is optional.

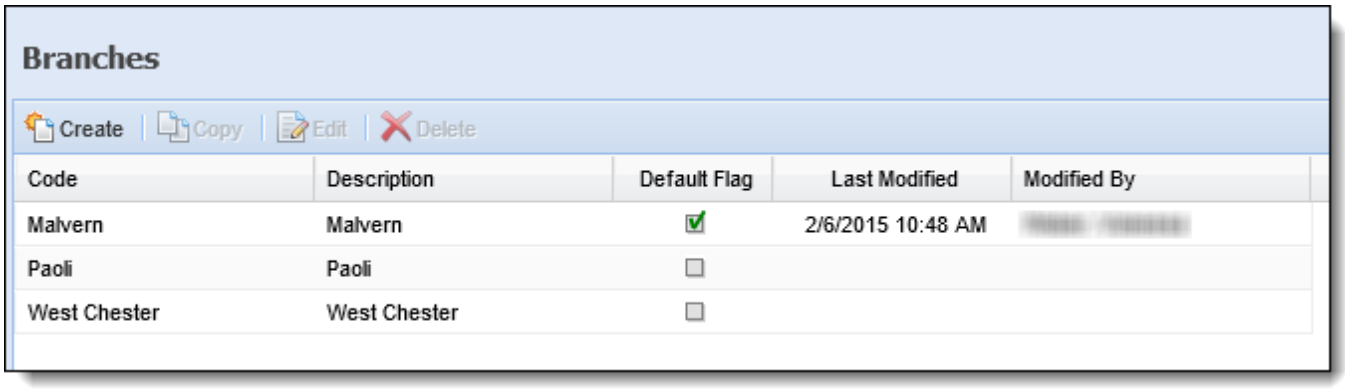
Once finished configuring Administrative Settings, click **Save**. Click **Cancel** to disregard any changes made.

Branches

Branches allows institutions to define the attributes of each operating branch.

The Branches page is found in System Management > **Branches**. From this page, a system administrator can create new and maintain existing branches in Temenos Infinity.

> Access to this page is granted in System Management > Users and System Management > Groups > Security Groups.



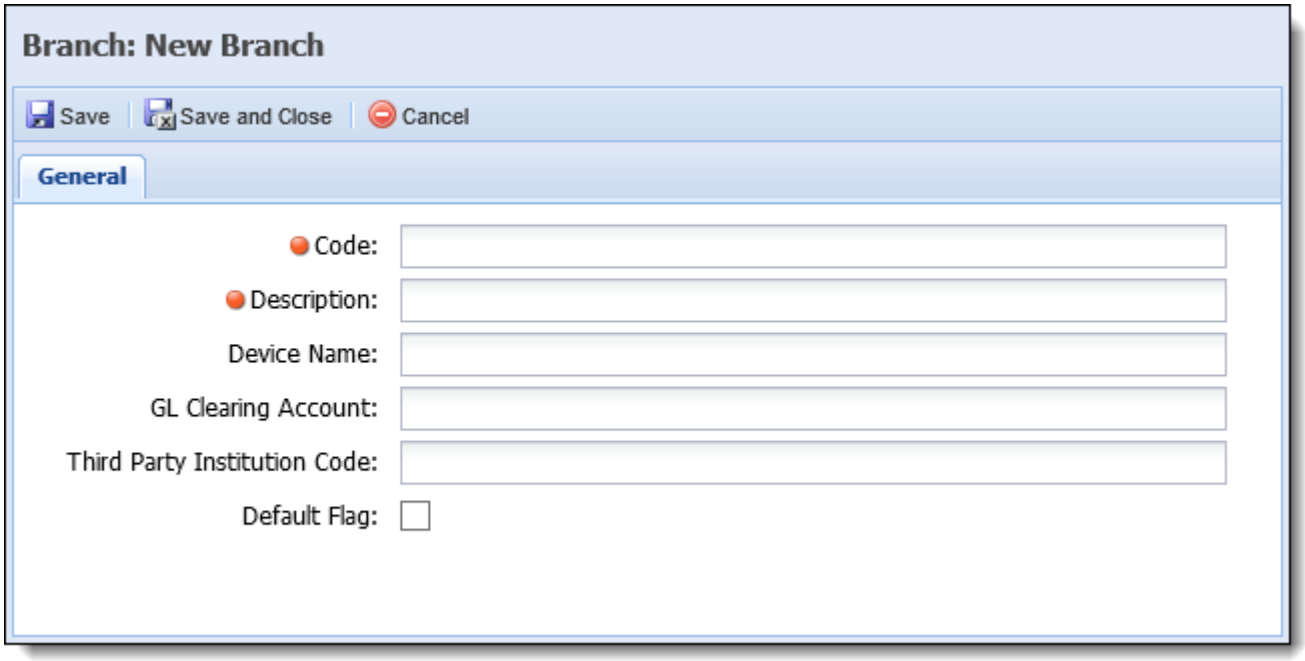
Information on this page is displayed in the following columns:

Column	Description
Code	Displays the code associated with the branch.
Description	Displays the description of the branch.
Default Flag	Displays a ☑ if the branch is the default branch used in Temenos Infinity.
Last Modified	Denotes when the last modification to the branch was made.
Modified By	Denotes who made the last modification to the branch.

Branch Attributes

All branches share common attributes that are defined when creating, copying, or editing a branch.

General



General attributes are defined within the General tab:

Attribute	Description

Code	Enter a code for the branch. This field is required and must be unique. The branch Code must be unique. If a branch with the same code already exists, an error message is received upon clicking Save or Save and Close.
Description	Enter a description to provide more information about the branch code. This field is required. The description is populated in the Closing Branch and Origination Branch drop-downs on a lending application.
Device Name	Enter the name of the device created in the core system. This allows the system to determine where users are working.
GL Clearing Account	Enter the name of the GL account used for the branch.
Third Party Institution Code	Enter the third party institution code.
Default Flag	Select this check box if the branch should be the default branch used in Temenos Infinity.

Creating a Branch

- To create a new branch, click Create. The New Branch window appears.
- Enter the General attributes.
- Click Save or Save and Close to return to the Branches page. Click Cancel to return to the Branches page without saving.

Copying a Branch

- To create a new branch based on a copy of an existing branch, highlight the desired branch and click Copy. The Copy Branch window displays.
- Make any necessary modifications and click Save or Save and Close. Click Cancel to return to the Branches page without saving.

Editing a Branch

- To edit a branch, highlight the desired branch and click Edit. The Edit Branch window displays.
- Make any necessary modifications and click Save or Save and Close. Click Cancel to return to the Branches page without saving.

Deleting a Branch

- To delete a branch, highlight the desired branch and click Delete.
- A confirmation message appears. Click **Yes** to delete the branch or **No** to retain the branch.

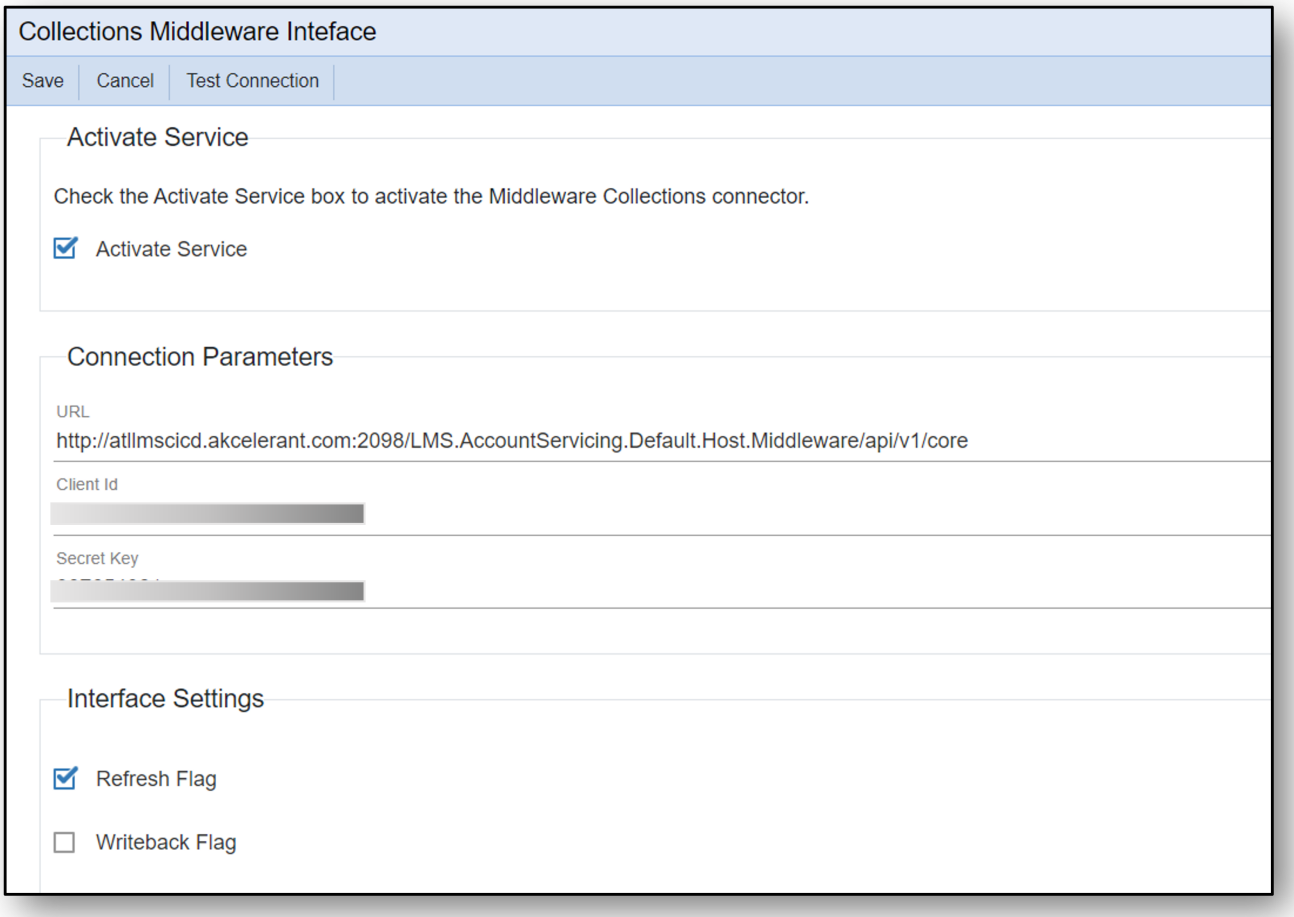
Collection

The Collection page (System Management > Modules > Collection) allows administrators to manage several features in Temenos Infinity. This page serves as a centralized hub for important Collection settings.

Configuring Middleware

For those connectors that use a middleware for collections, the Temenos Middleware has to be configured to connect to their respective interfaces.

To access the Middleware page, navigate to System Management > Connectors > Temenos > Middleware - Collections.



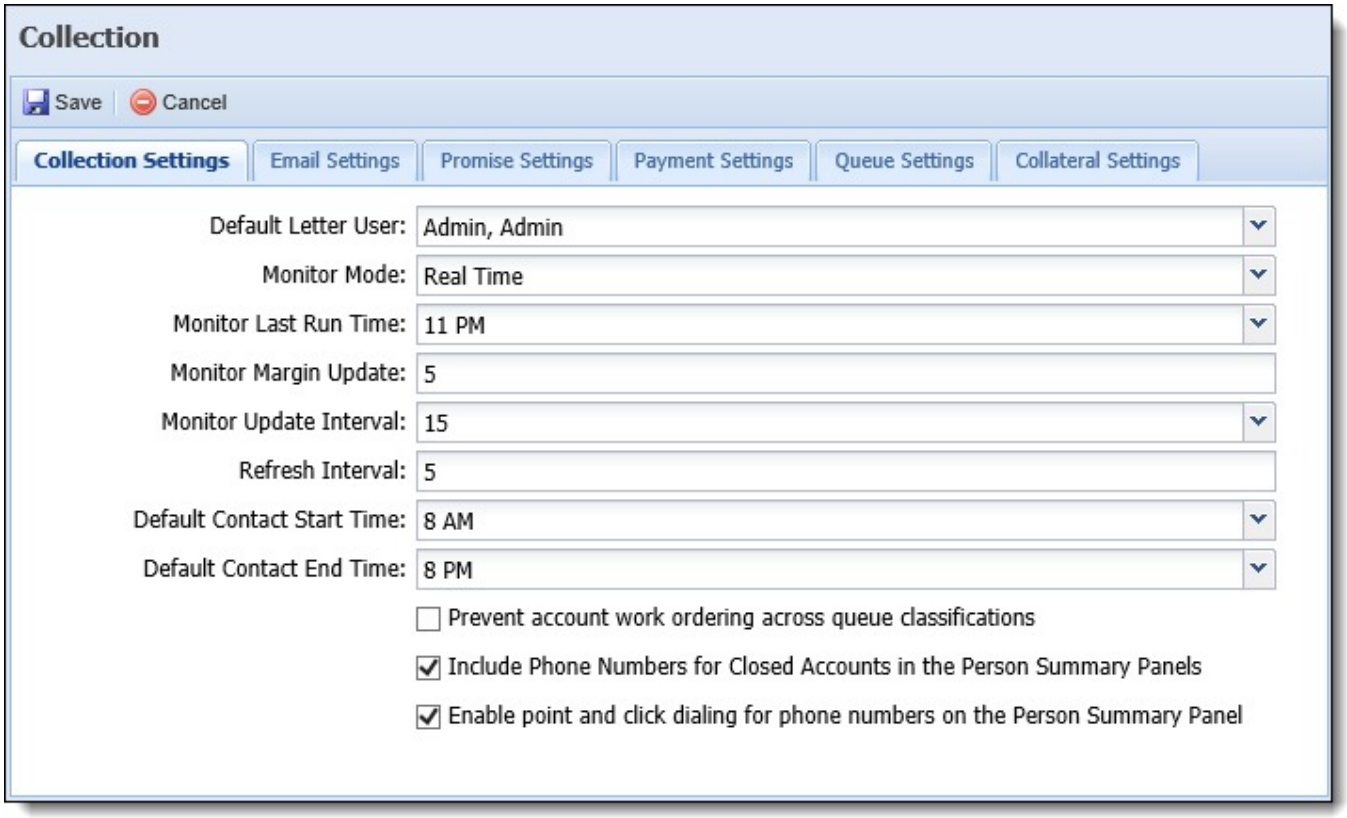
The below is an overview of the parameters used to configure middleware for collections.

Field/Flag	Description
URL	Enter the URL of the connector interface
Client ID	Enter the Client ID, as provided by the connector's middleware administrator.
Secret Key	Enter the Secret Key, as provided by the connector's middleware administrator.
Refresh Flag	If the Refresh Flag is checked, the connection parameters screen refreshes the connection from the host.

Writeback Flag	If the Writeback Flag is checked, the connection parameters screen writes back the connection to the host.

Collection Settings Tab

This tab contains general collections settings.



The following fields are displayed:

Field	Description
Default Letter User	This drop-down contains a listing of all users in Temenos Infinity, both active and inactive. The user defined in this field is added to those letters where the collector name is a merge field in the template when the letter is generated via an automated queue. If "Doe, Jane" is displayed in the Default Letter User drop-down, and Jane Doe is deleted from Temenos Infinity, the Default Letter User value automatically reverts to the top name in the User List as displayed in System Management > Users. Making a user inactive in the system has no effect on the ability to have them set as the Default Letter User.

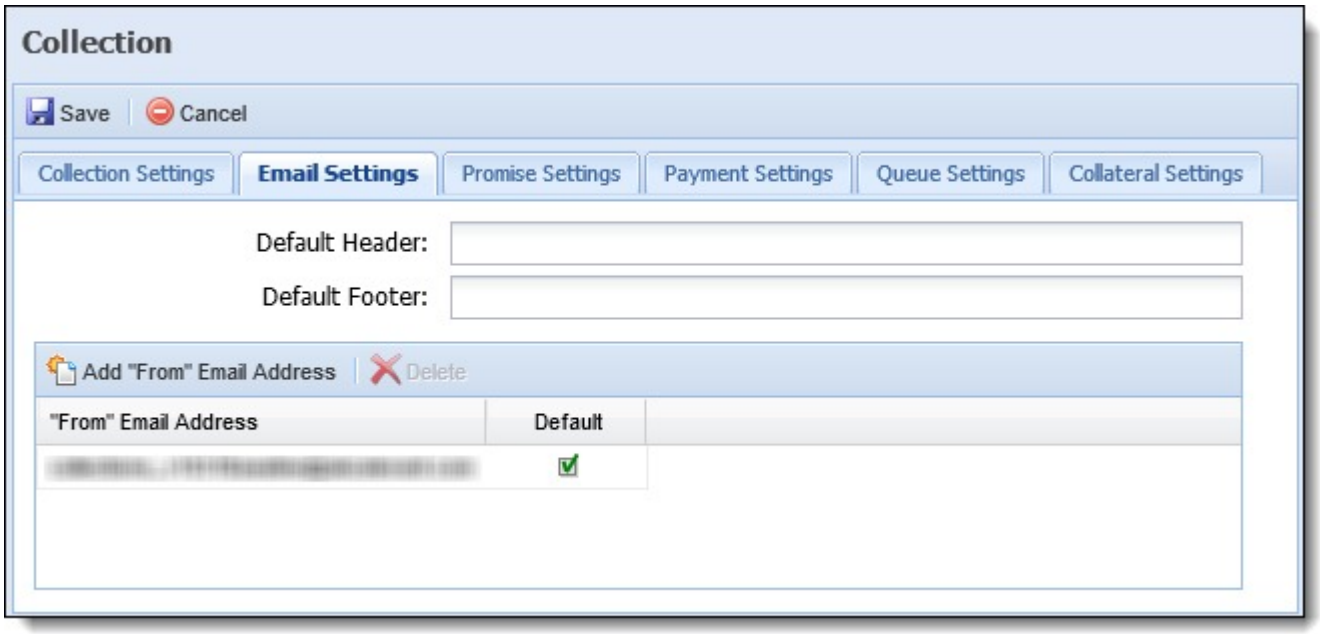
Monitor Mode	This drop-down determines how dashboards are to be updated. By default, Monitor Mode is set to Batch. • **Batch**: Batch runs the Monitor process once a day. This means users do not see the values in dashboards until the following work day when the Batch process runs. • **Real Time**: Real Time updates the dashboards throughout the day as the end-users work in the system. This number is in minutes. Temenos does not recommend anything less than 60 minutes (1 hour). If the process is constantly running it could potentially slow down the server, as the process is constantly hitting the database to obtain the necessary data to update the information on the dashboards.
Monitor Last Run Time	This determines what time the Monitor process runs at the end of the day.
Monitor Margin Update	Specify a percentage to be used throughout the Monitor process to determine how trend arrows are defined in the Monitor Margin Update field. If the Monitor Margin Percentage is set at 2%, then 98%-102% performance calculations are represented by a yellow dash, indicating “Even.” Performance calculations under 98% are represented by a red “Down” arrow. Performance calculations over 102% are represented by a green “Up” arrow. If the Monitor Margin Percentage is set at 5%, 95%-100% would be “Even,” fewer than 95% would be “Down” and over 105% would be “Up.”
Monitor Update Interval	Determine how often the monitor and queue home page are updated.
Default Contact Start Time	Determine the default start time an account created within Temenos Infinity can begin to be worked.
Default Contact End Time	Determine the default end time an account created within Temenos Infinity can be worked.
Prevent account work ordering across queue classifications checkbox	Select the check box to separate Delinquency and Recovery queues into two tabs within the Collection Queue Work Order page in System Management. This prevents accounts that may fall into both queue classifications from being worked across both.
Include Phone Numbers for Closed Accounts in the Person Summary Panels	This check box determines if phone numbers related to closed accounts for the PersonMasterID are displayed in the Other Phones window, which is accessed from the Person Summary panel in the workspace. By default, this parameter is set to true to display phone numbers for closed accounts in the Other Phones window. If desired, clear the check box to exclude phone numbers related to closed accounts from the Other Phones window.

Enable point and click dialing for phone numbers on the Person Summary Panel	This check box determines if users are able to call an account holder by clicking on the phone numbers in the Person Summary Panel. When this check box is selected, the phone numbers displayed in the Person Summary Panel display as hyperlinks. To use this functionality, an institution's phone system must support Tel protocol. Point and click dialing is only supported by Cisco Jabber.

Email Settings Tab

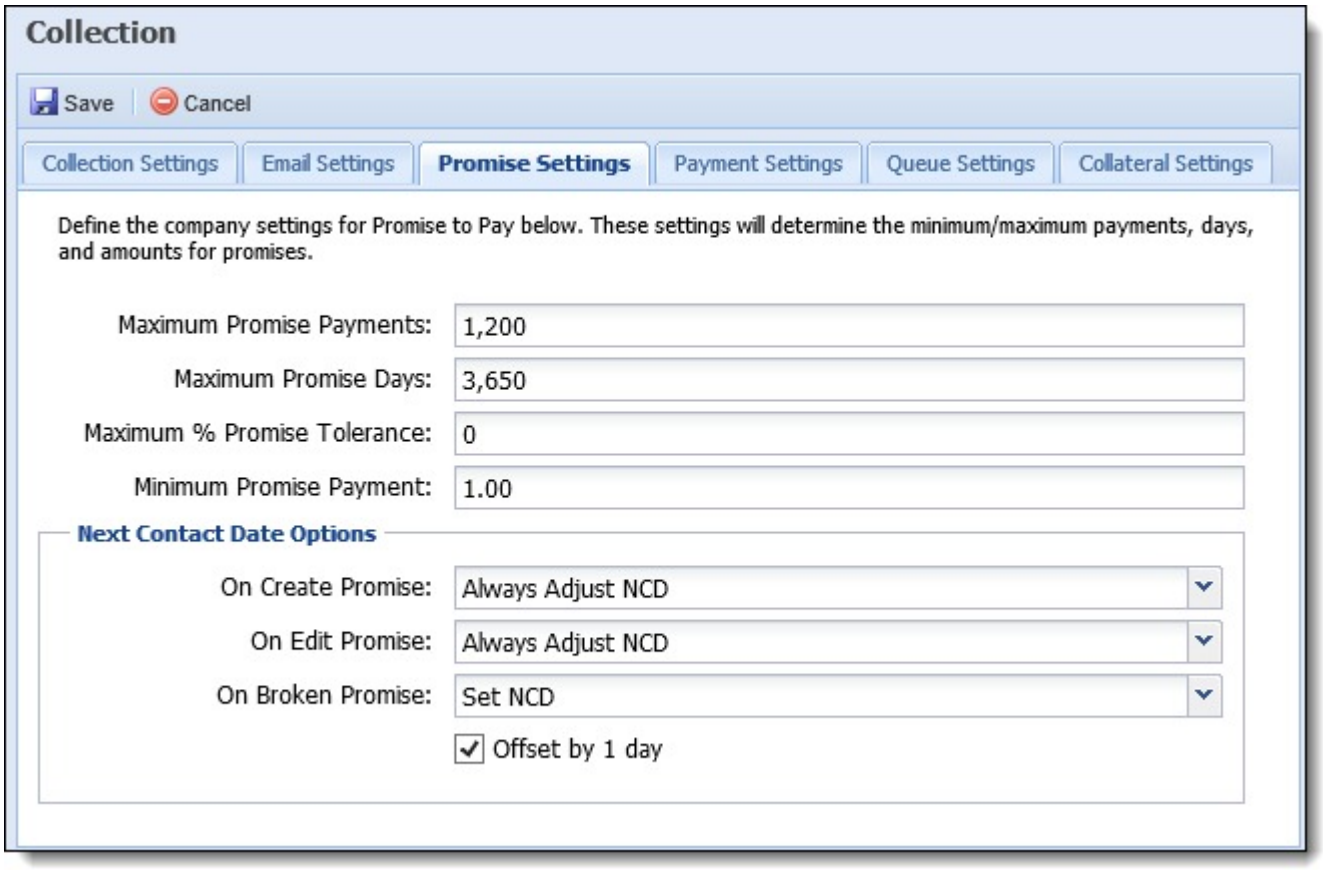
This tab allows administrators to configure settings for when emails are sent using the Send Email workflow step. If necessary, define a header and footer to display by default when an email is sent. These settings can be changed manually from within the workflow step.

Also, administrators can manage the list of "From" email addresses that a user can choose from when sending an email using the Send Email workflow step. Clicking **Add "From" Email Address** populates a new line item in the grid. Click within the line item and enter in an email address. When finished click **Save** or click **Cancel** to erase the text entered. Click the checkbox to make it a default selection. To delete an email address from the list, highlight an item in the grid and click **Delete**.



Promise Settings Tab

Within the Promise Settings tab, define the company settings for Promise to Pay. In the top section, determine the minimum/maximum payments, days, and amounts for promises. If a user exceeds any of these settings set forth by an administrator, a message appears indicating that the promise to pay needs management approval. Management approval occurs in System Management > Collections > Promise Approval.



The following fields display within this tab:

Field	Description
Maximum Promise Payments	Determines the maximum number of promise payments a user can take as part of a promise to pay.
Maximum Promise Days	Determines the maximum number of days in which the user can set the due date of the first payment.
Maximum % Promise Tolerance	Determines the maximum discount percentage that can be applied to a promise.
Minimum Promise Payment	Determines the minimum promise amount a user can take when obtaining a promise to pay.

Next Contact Date Options

Within the Next Contact Date Options section, determine how an account's next contact date is adjusted when a promise is created, edited, or broken. The following options are available to select within the drop-downs:

- **Always adjust NCD:** Next Contact Date automatically updates to correspond with the last promise payment due date.
- **Prompt to Adjust NCD:** The user is prompted to decide whether to adjust the Next Contact Date to correspond with the last payment due date, or keep the original Next Contact Date.
- **Do Not Set NCD:** The Next Contact Date is not affected by the last promise payment date.
- **Set NCD:** The Next Contact Date is affected by the last promise payment due date.

> Set NCD is only available for the "On Broken Promise" Next Contact Date Option.

If desired, the Offset by 1 day parameter can be selected to automatically advance the Next Contact Date by one day for a promise, in order to ensure that account holders are not contacted until a promise is actually considered broken, one day after the due date.

> The Offset by 1 day parameter only applies to the On Create Promise and On Edit Promise options. This parameter cannot be set for broken promises.

These Next Contact Date Options are used in conjunction with the Promise Delay setting configured for the payment type being used for the promise in order to adjust the Next Contact Date appropriately.

> The Promise Delay Setting for a payment type is configured in System Management > Payment Types. For more information on the Promise Delay setting, please see the Payment Types topic in this guide.

- When a promise is created or edited, the Next Contact Date is automatically calculated, or the user is prompted to adjust the Next Contact Date, according to the values set within the Next Contact Date Options section. The Next Contact Date on the account is then updated according to the last payment due date for the promise, the value of the Offset by 1 day parameter, and the number of days defined for the Promise Delay set for the payment type being used for the promise.
- When a promise is broken, the Next Contact Date is updated to the number of days defined for the payment type.

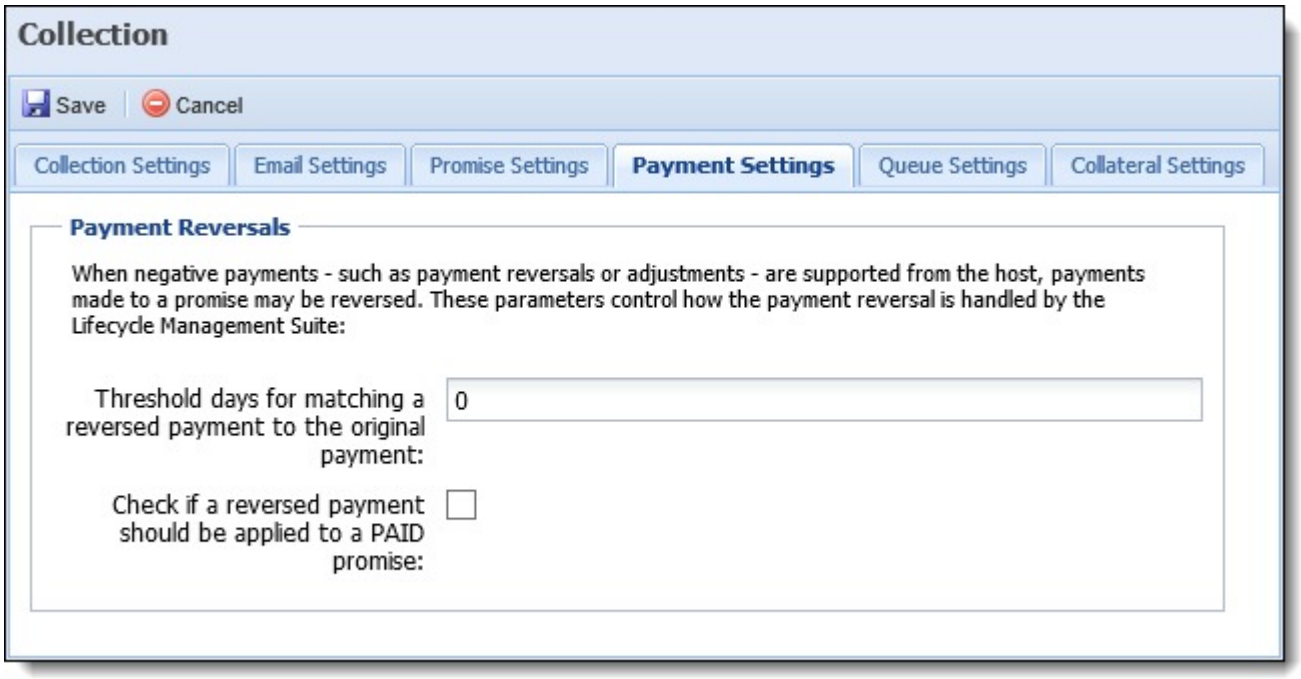
For example, if the On Create Promise Next Contact Date Option is set to "Always Adjust NCD," and the Offset by 1 day parameter is set to true, when a promise is created on an account, and payments are to be made by a payment type with a Promise Delay of two days, then the Next Contact Date on the account is automatically set to a date that is three days after the date the last payment is due. If the Promise Due Date is June 15th, the Next Contact Date is set to June 18th.

> In the above example, if the Offset by 1 Day Parameter is set to false, the Next Contact Date is set to June 17th, which is two days after the Promise Due Date.

Payment Settings Tab

The Payment Settings tab provides the ability to manage how payment reversals are handled in Temenos Infinity when negative payments such as payments reversals and adjustments are supported by the Host.

> To learn more about how payment reversals are supported in a specific Core, please see the applicable Core Connector Guide.

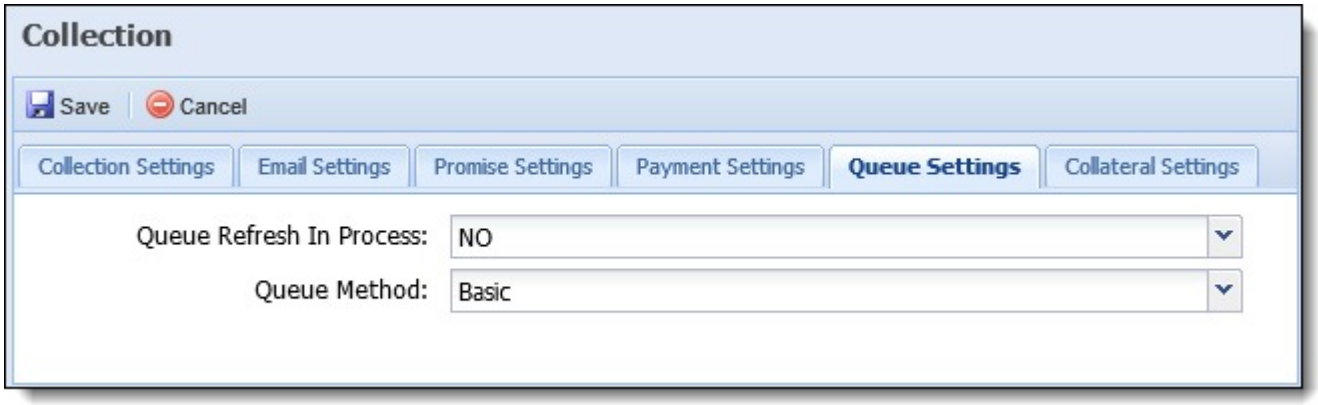


The following fields display within this tab:

Field	Description
Threshold days for matching a reversed payment to the original payment	Enter the number of days a reversed payment can be matched to an original payment within Temenos Infinity.
Check if a reversed payment should be applied to a PAID promise	Select this check box to change the status of a promise if any payments made match the promise.

Queue Settings Tab

The Queue Settings tab allows administrators manage options that affect queuing in Temenos Infinity.



The following options display in this tab:

Field	Description

Queue Refresh In Process	Displays as "YES" when a Queue Refresh is currently processing. Change the option to "NO" to stop the Queue Refresh process. Stopping the Queue Refresh process using this feature does not affect the process from automatically kicking off at the designated time.
Queue Method	Select the method of queuing to be applied in Temenos Infinity. **Basic**: With Basic Queuing, queues are built using account criteria and accounts fall into an individual queue. An evaluation of the person does not occur. **Advanced**: With Advanced Queuing, system administrators can author simple or complex business rules to determine Queue Eligibility and use account and/or account holder attributes to organize and assign accounts and persons to a collections queue. This method of queuing provides the ability to not only queue individual accounts, but also the person and all of their eligible, non-queued accounts as well. With Advanced Queuing, administrators can define Queuing Rules in System Management > Collections > Rules Management to determine Queue Eligibility and automatically assign a person and all of their accounts to specific queues as rule conditions are met. Please see the Advanced Queuing topic within this Guide for more information. To learn more about authoring Business Rules, click here. In order to assign and author rules for Advanced Queuing, the ability to author Business Rules must be enabled for your institution. For more information about how to enable this functionality, please contact your Temenos Customer Care Representative.

Collateral Settings Tab

The Collateral Settings tab defines the values used when creating or editing an Equity Analysis through the Equity Analysis panel that can be added to account collateral screens.

The following fields display on this page:

Field	Description
Default FMV Discount %	Set the default Fair Market Value percentage. This value appears by default in the Equity Analysis screen but can be overwritten by the user.

Default FMV Discount $	Set the default Fair Market Value dollar amount. This value appears by default in the Equity Analysis screen but can be overwritten by the user.

When finished configuring settings within the Collection page, click **Save**. Click **Cancel** to close the page without saving any changes.

Configuration Manager

The Configuration Manager allows an institution to configure system settings in one Temenos Infinity system (i.e. a source system) and then transfer those settings to another Temenos Infinity system (i.e. a target system). Transferring settings from one environment to another in just a few clicks saves time and prevents errors from occurring when trying to rebuild configurations from scratch.

> Configuration Manager is automatically included in release 14.00.00 and higher of Temenos Infinity; therefore, no additional activation steps are required.

The Configuration Manager process is bi-directional, meaning that settings can be sent from a test system into a production system and can also be sent from a production system back into a test system. In order for this to work, the source system and the target system must be on the same Temenos Infinity release. The process that gathers configuration information from the source system is called an Export. The process that adds configurations to the target system is called an Import. Both the Export and Import are accessed through System Management.

Most of the configurable items available in System Management can be imported and exported through Configuration Manager. An item is a piece of Temenos functionality that is available for export. When selected for export, these items have related items that must also be exported in order for the selected item to function properly in the target environment. For example, if a workflow is selected to export, all of its workflow steps and associations (mappings to users, groups, etc.) are also included in the export.

Please see the Relationship Mapping section of this topic for a complete list of available items to import/export and their related items.

> The following items are not available for import and export using Configuration Manager:
>
> - Information within the Credentials tab in System Management > Users
> - Advanced Views
> - Code or custom files

Data cannot be exported using Configuration Manager.

The Configuration Manager topic includes the following information to assist administrators in using Configuration Manger:

- System Requirements
- Configuration Manager in the Workplace
- User/Security Group Permissions
- Configuring an Export
  - Export Components
  - Adding Export Items
  - Removing Export Items
  - Generating the Export
  - Relationship Mapping
    - Rule Items
- Configuring an Import

    - Uploading Import Items
    - Running the Import Process on the Server
    - Importing Configurations through EXE
    - Viewing Package Contents
    - Deleting Import Items
    - Identifying Imported items
    - Import and Rollback Processing Stages
- Troubleshooting
    - Unique Names/Values that cause an Import to Fail
    - Issue #1: Source and Target Versions
    - Issue #2: Source GUIDs not matching
    - Issue #3: Functionality has a Rule that no longer exists in the Rule Application
    - Issue #4: Custom Field Deleted from Target Environment

System Requirements

In order for an institution to use the Configuration Manager feature, the following requirements must be met:

- Temenos Infinity release 14.00.00 or higher.
- Source and Target environments both on the same Temenos Infinity release.
- "Access data sources across domains" Internet Explorer security setting set to "Enable" on all machines using Configuration Manager.

> It is recommended that databases in the source and target environments are in sync (target environment restored to the source environment) prior to any Configuration Manager functionality being used. A copy of the target database should also be taken prior to the import process. Failure to complete these steps may result in issues with naming conflicts during the import.

> In order for Configuration Manager to work, collation must be the same in both the source and target environments' server and database. If collation is not the same, an error is received upon import of the package in the target environment, preventing the import from completing successfully.

Configuration Manager in the Workplace

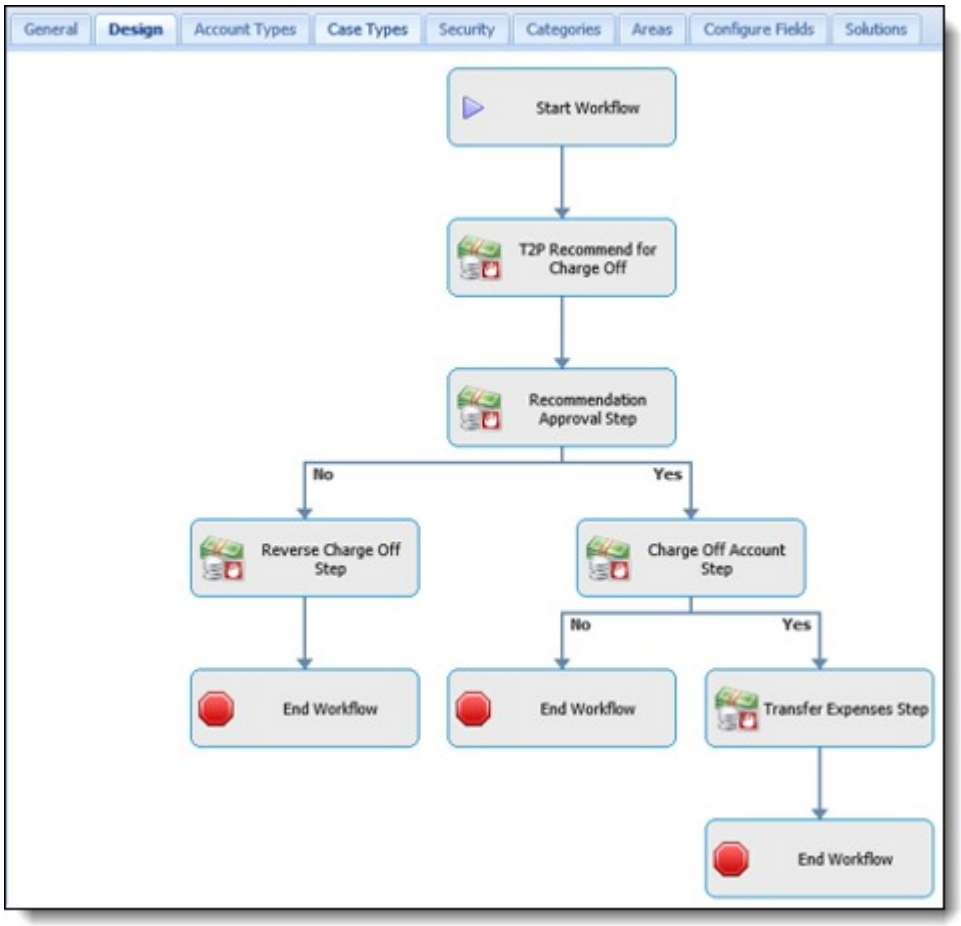
The following is an example of how an institution can use Configuration Manager to transfer system settings from one environment to another environment.

Lois Uses Configuration Manager to Transfer Test Settings to a Production Environment

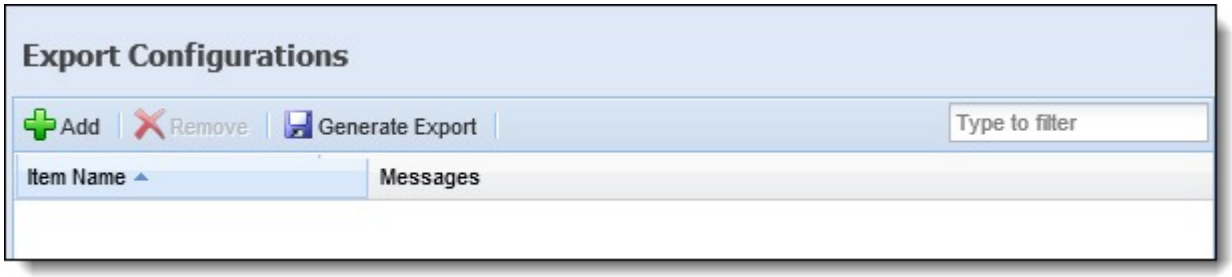
Lois is a manager at Quahog Financial. The financial institution has recently installed Temenos Infinity release 15.05 in their test environment. Lois has been eagerly configuring the new system to suit her institution's business needs. Once she is done configuring and testing release 15.05, her IT resource loads the same release in production.

Lois is now dreading the thought of having to reconfigure her new production system to match her test system, until she remembers that she can use Configuration Manager to transfer her settings in a few simple clicks.

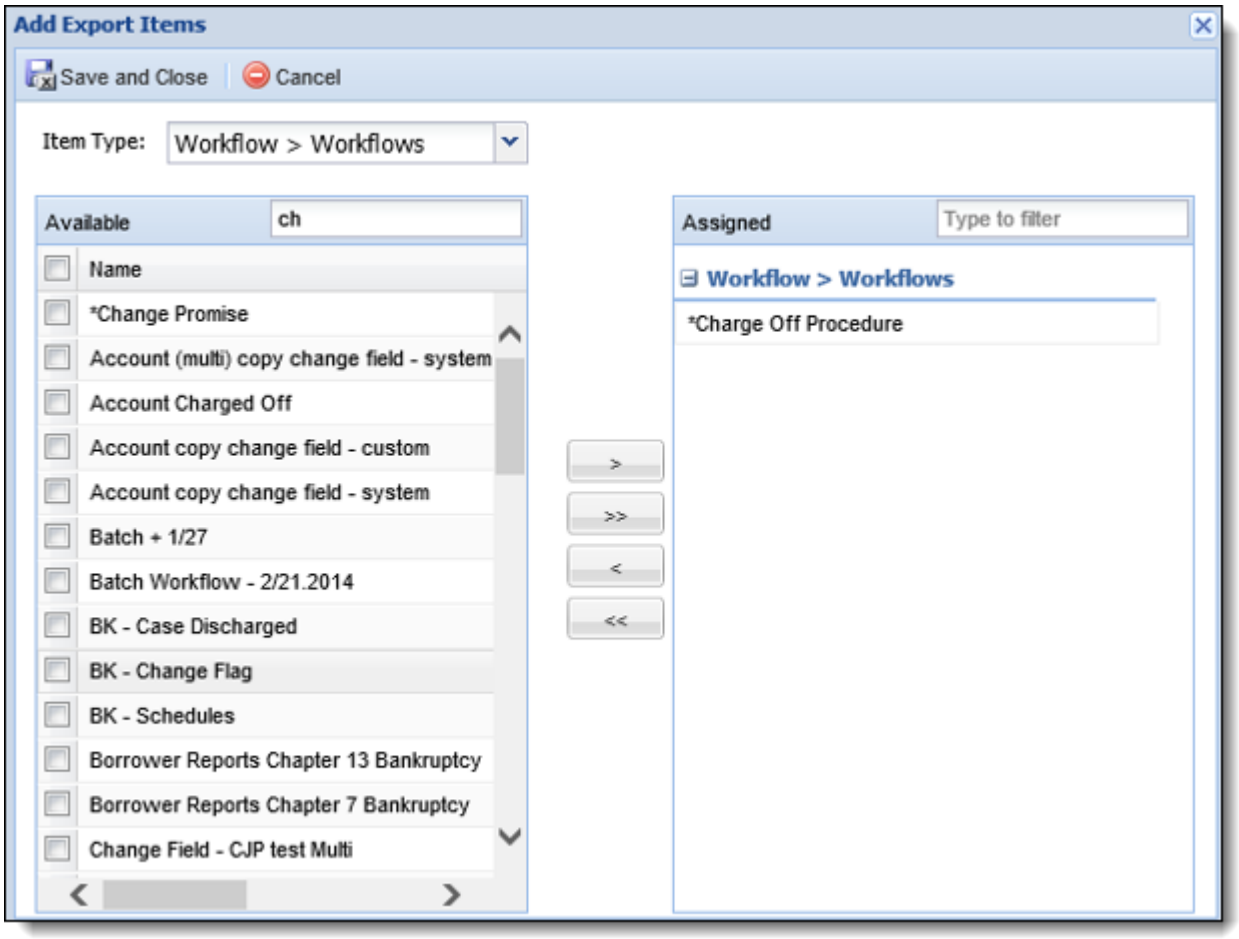
She wants to first transfer a rather complex Charge Off workflow, shown below.



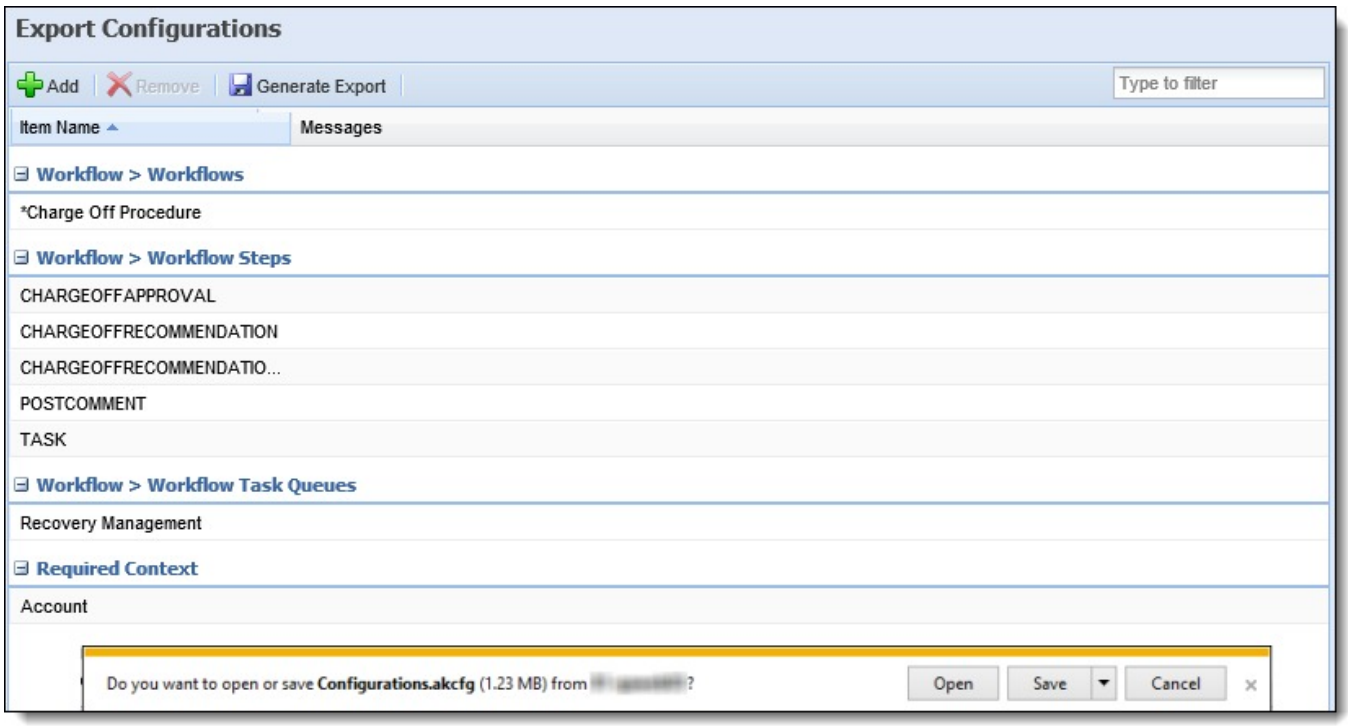
On her test system, Lois browses to System Management > Configurations > Export Configurations and clicks Add.



She selects Workflows from the Item Type drop-down and finds the Charge Off Workflow in the list of Available workflows. She uses the arrows on the screen to move the workflow to the Assigned list and then clicks Save and Close.

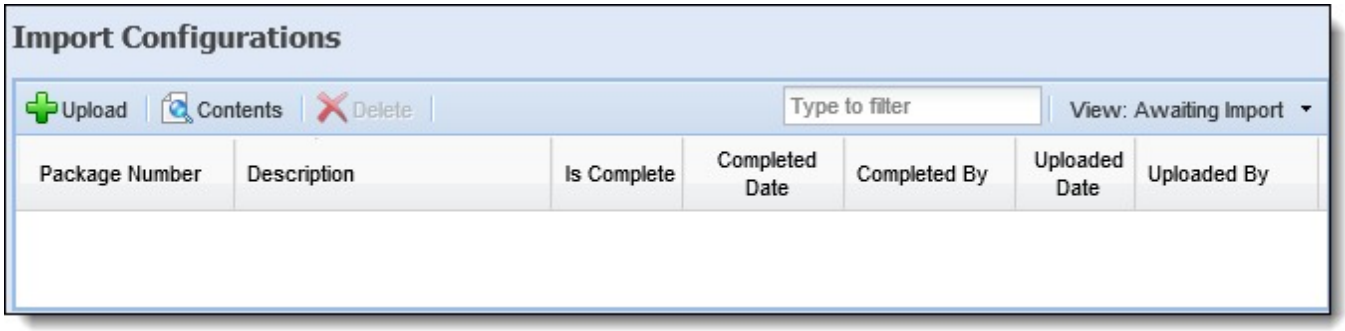


The Charge Off workflow is displayed on the Export Configurations page along with all of the associated workflow steps. She clicks Generate Export and is prompted to save the Configurations file.

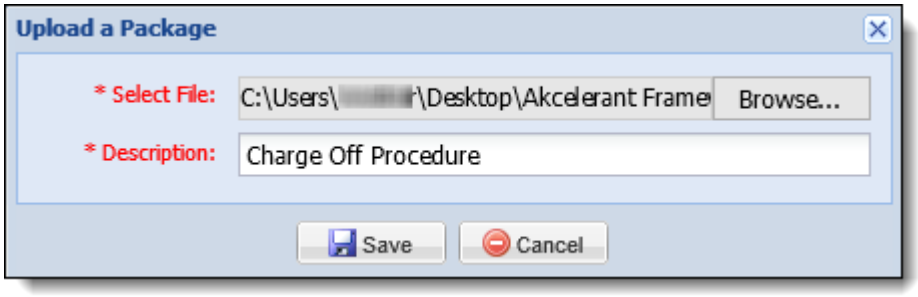


She saves the Configuration file on her local machine then logs in to the production system to upload the export

package. Lois browses to System Management > Configurations > **Import Configurations** and clicks Upload.



In the Upload a Package window, Lois clicks **Browse** to browse to the location of the file to import and provides a description of the file so its purpose is clear. She clicks Save and the package is added to the Awaiting Import list.



Next, Lois notifies her IT resource, Peter, to run the import process on the production Temenos Infinity web/app server. Peter waits until the close of business that night to run the import process and informs Lois the next morning that the Charge Off workflowhas been successfully loaded into production.

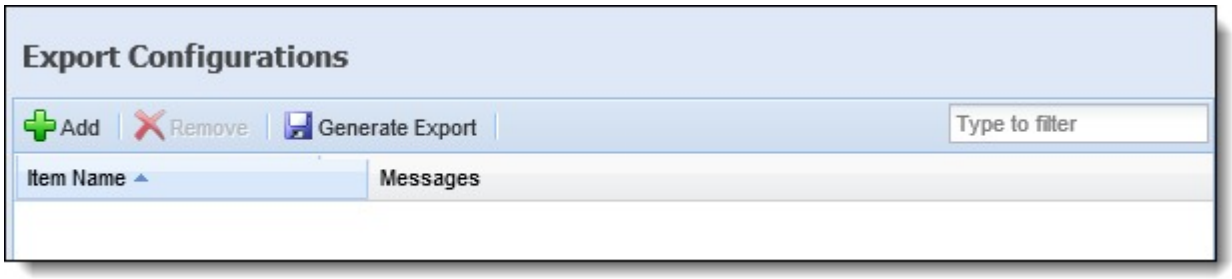
User/Security Group Permissions

In order to configure and run an Import or Export, permissions must be granted for each user or security group. To assign permissions for Configuration Manager:

- Navigate to System Management > Users or System Management > Groups > Security Groups.
- Create a new user or group, or select an existing user or group and click Edit
- Within the Permissions tab, navigate to the System Management category and set the following permissions to Change:
  - Configuration Export
  - Configuration Import
- When finished, click Save and Close.

Configuring an Export

The Export Configurations page can be accessed from System Management > Configurations > Export Configurations to provide system administrators with the ability to configure the items for export through Configuration Manager.



This page displays information about the Export items added to Configuration Manger within the following columns:

Column	Description
Item Name	Displays the name of the Export Item.
Messages	Displays any informational messages related to the item.

From the Export Configurations page, system administrators can perform the following actions:

Button	Description
Add	Click this button to add a new item to the export.
Remove	Click this button to remove an item from the export. Required items cannot be removed.
Generate Export	Click this button when finished adding items to export. This generates the export package.
Filter	Use this box to filter items in the list for export. Any text can be entered to narrow down the items displayed on the page.

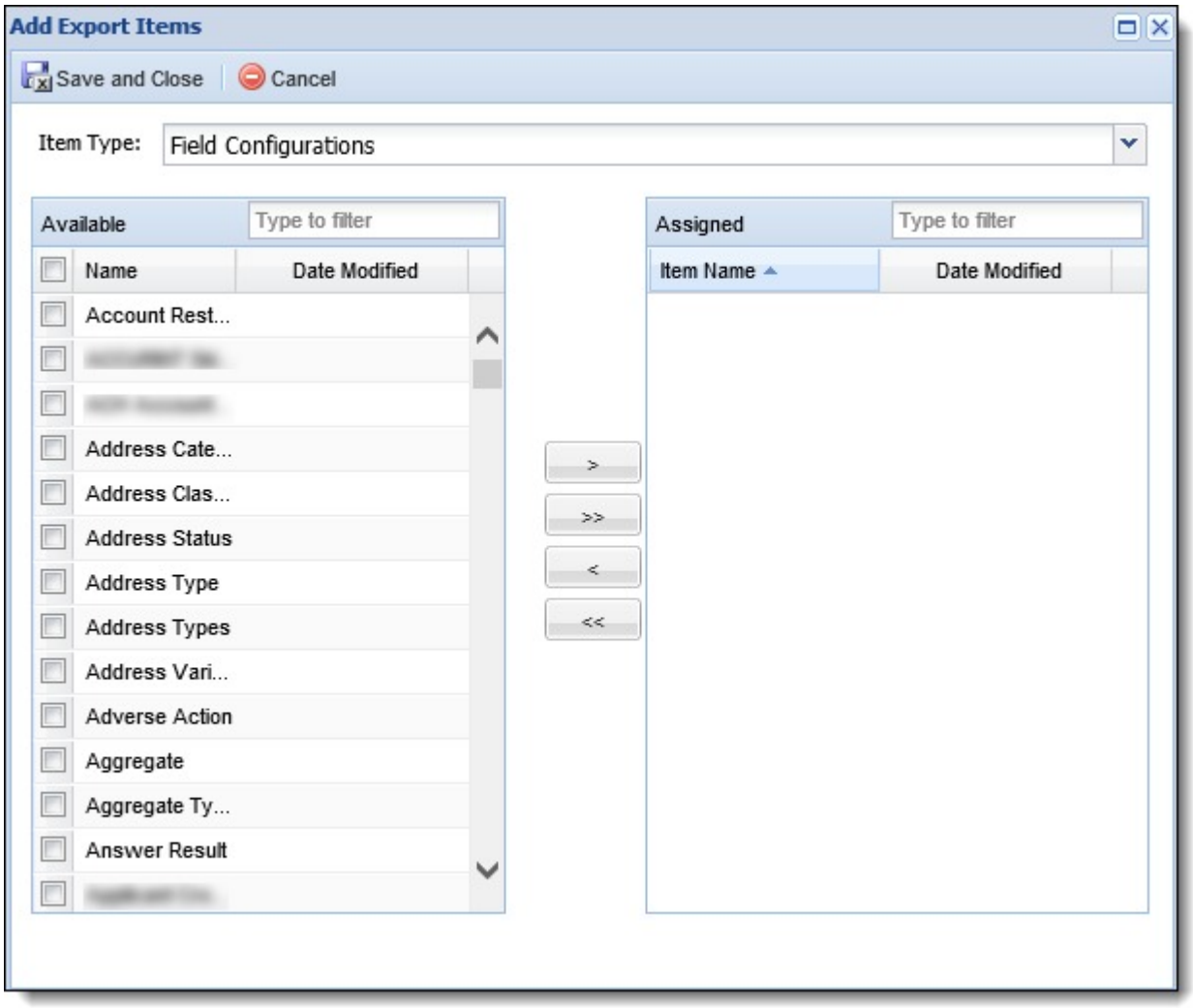
This section provides an overview of the following information to assist system administrators in configuring items for export using Configuration Manager:

- Export Components
- Adding Export Items
- Removing Export Items
- Generating an Export
- Relationship Mapping
  - Rule Items

Export Components

The following components are defined for each Export Item added to Configuration Manager:

> The items that are displayed in the Add Export Items window are dependent on the solution that is active. For example, if loan origination is not active in Temenos Infinity, loan origination items do not appear in the list of Item Types or Available/Assigned items.



Component	Description
Item Type	Displays a drop-down list of all available Temenos functionality that can be exported from the source environment. Any item specific to a Temenos Infinity module (Collection, Loan Origination, Account Origination, Service, or Recovery) is only displayed if that module is active.
Available Box	Displays the items available to add to the export package. Assign export items to the package by selecting the desired item(s) from the list and moving to the Assigned box using the arrows that display. This list changes depending on the Item Type selected.
Assigned Box	Displays the items that have been assigned for export.

If connector-specific items are being exported, ensure that the connector is activated and properly configured in the source and target environment prior to exporting and importing. If the connector is not activated in the target system, the connector-specific items, such as workflow steps, do not function correctly.

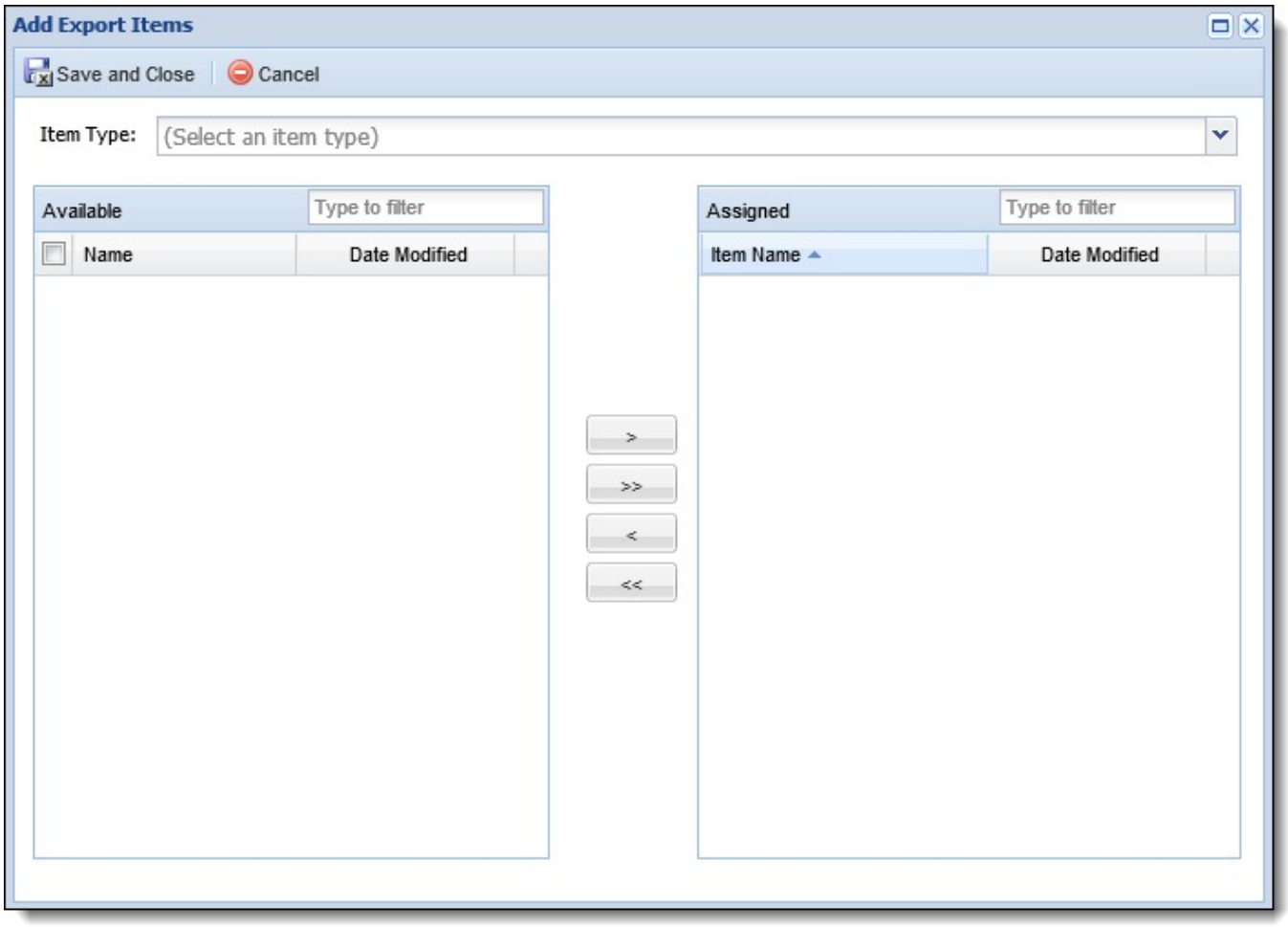
User permissions in the custom range (NCCI) are ignored by Configuration Manager. These permissions are not deleted in the target system when a user is exported and imported via configuration manager because they are not included in the import file. If they are deleted, they will be lost. NCCI permissions need to be completely managed outside of Configuration Manager.

Adding Export Items

The Add function provides the ability to define the functionality items to be exported through Configuration Manager as well as assign additional items to be included as part of the export.

To add an Export item, click Add within the top of the Export Configurations page.

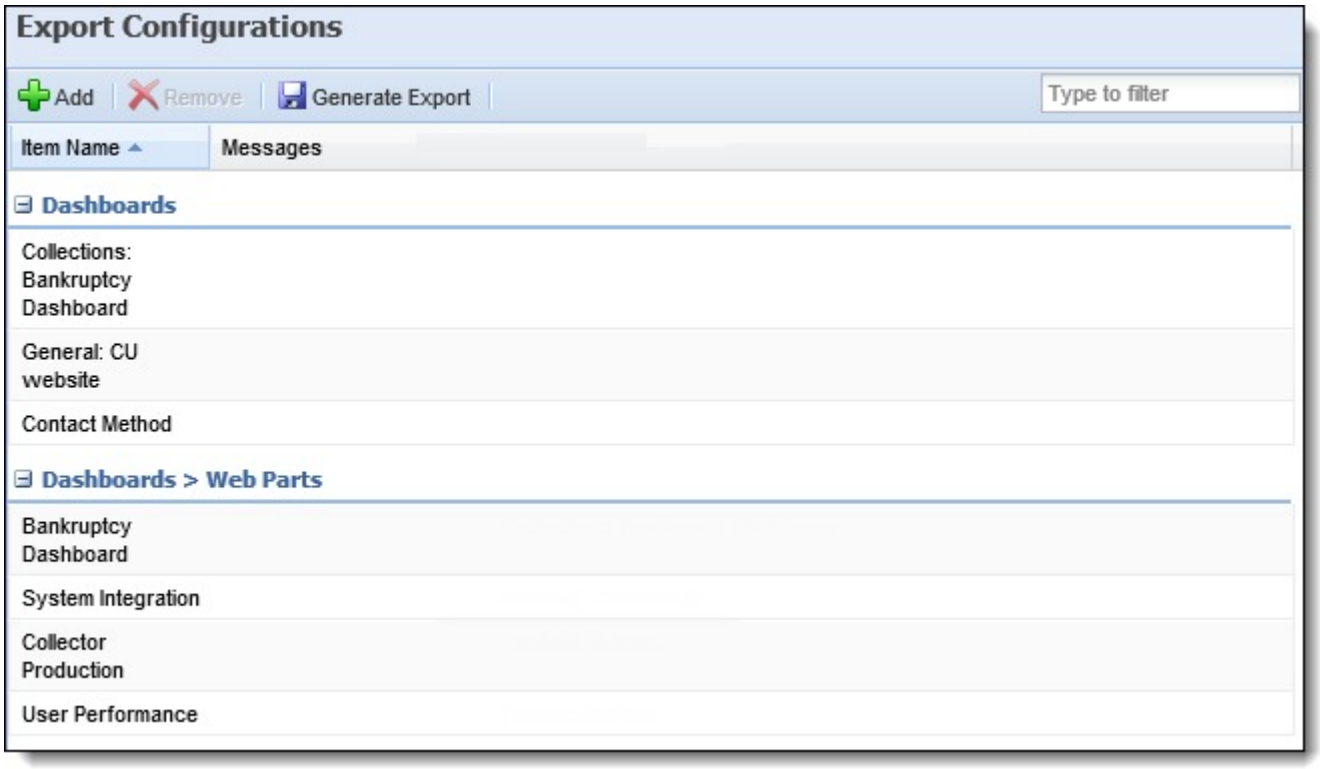
The Add Export Item window appears:



Assign all Export Components. Once all components are assigned, click Save and Close

The added functionality items appear on the Export Configurations page, along with any additional items that are included as part of the export. The Export Items are organized in groups based on the Item Type selected. In the example below, the System Integration web part is a part of the CU Website dashboard being exported and all of the Web Parts are grouped together under the Dashboards > Web Parts heading.

The number of groups displayed varies based on the functionality items chosen for export. One functionality item may have many groups of additional items.



When finished configuring the Export, click Generate Export. See the Generating an Export section below for more information.

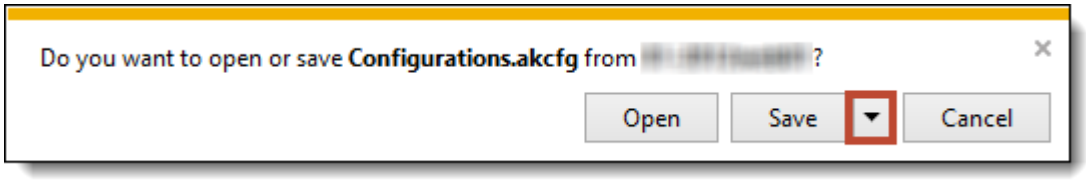
Removing Export Items

> Required relationships, or items that must be exported with a functionality item, cannot be removed.

- To remove an item from the list on the Export Configurations page, highlight the item within the list and click Remove.
- Once Remove is clicked, the export item is deleted from the list.

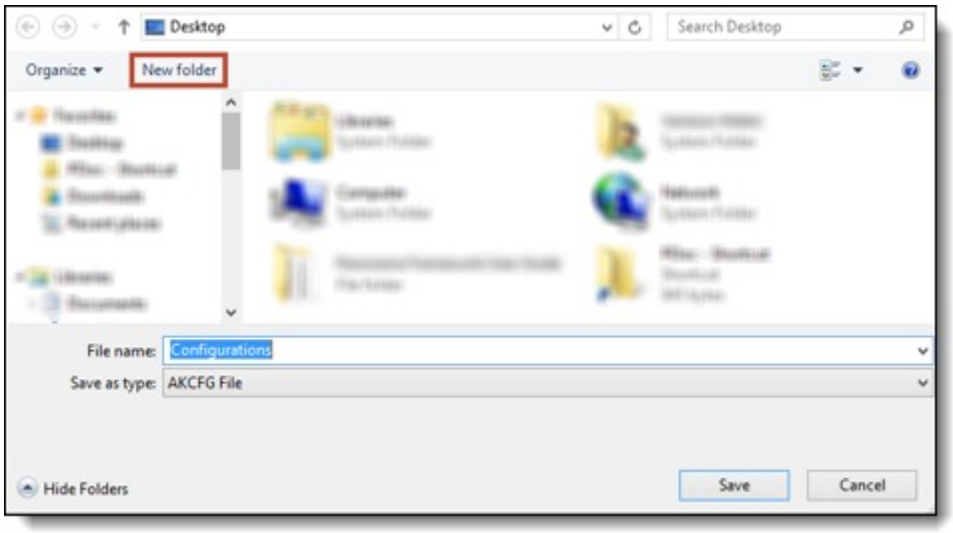
Generating an Export

- To generate an export, select the desired item within the list on the Export Configurations page and click Generate Export.
- An Internet Explorer prompt appears instructing to Open or Save the Configurations.akcfg file. Click the arrow next to **Save** and select **Save As**.



- Windows Explorer opens. Create a new folder on the local machine or on an accessible network drive so it can be retrieved when it is time to upload the file into the target system.

> The file path cannot contain a dot (.). The import into the target system cannot process a file that has a dot in the file path location (C:\Framework.Default, for example).



The generated file is always named Configurations.akcfg. To create multiple export packages, rename the file without changing the ".akcfg" extension, so the original files are not overwritten.

If the Configurations.akcfg file is renamed, the extension cannot be changed; it must remain ".akcfg." If this is changed, the import package cannot be successfully loaded to Temenos Infinity on the Configuration Manager Import screen.

- The Export is complete and the Import process can begin.

Relationship Mapping

The following table outlines each Item Type available when configuring an export and the related items that get configured in the package.

Related Items are defined as the components of the Item that are necessary to include in the package so the Item can function as intended in the target environment. With some items, only the relationship to the related item is included in the package. For example, the relationship between the Users assigned to an Area are included in the package. The actual Users and all of their Related Items are not included in the package with the Area, unless the Users Item Type is selected for export. For this reason it is important that the databases in the source and target environments are in sync so the correct and required Users exist prior to starting Configuration Manager work.

Item Type	Database Table	Related Item - Database	Related Temenos Item
Account Types	tblAccountType	tblWorkflowAccountType	The general settings, assigned screens, and Account Mappings configured for the Account Type in System Management > Account Types.

Address Book > Companies	tblCompany	tblCompanyTypeMapping	The general settings, Contacts, and Documents configured for the Company in System Management > Address Book > Companies.
Address Book > Contacts	tblContacts	tblCompany	The general settings configured for the Contact in System Management > Address Book > Contacts.
Areas	tblArea	tblCategoryMapping tblAreaGroup tblAreaUser tblWorkflowArea tblAreaHyperlink tblAreaScreen Core.Screen	The general settings, Assigned Users and Groups, Screens, Workflows, Categories, and Rules configured for the Area in System Management > Areas.
Case Types	tblCaseType	tblScreenCaseType tblWorkflowCaseType Core.TaskProcessDefinitionMap Core.TaskQueue Core.TaskDefinitionMap	The general settings, Screens, Case Processes, and Case Tasks configured and assigned to the Case Type in System Management > Collections > Case Types.
Categories	tblCategory	tblCategoryMapping	The general settings, Areas, Workflows, Dashboards, Views, Reports, Reasons, Screens, and assigned Users configured for the Category in System Management > Categories.

Collections > Collection Queues	tblQueue	tblPerfGroup Core.CustomField tblInterfaceQueue tblQueueGroup tblQueueUser tblQueueRuleGroup	The general settings, Criteria, Sorting, Assigned Users, and Assigned Groups configured for the Collection Queue in System Management > Collections > Collection Queues. The queue's precedence (order in which it is refreshed) is not included in the export. After the import into the target environment, the queue refresh order must be manually configured in System Management > Collections > Collection Queue Refresh Order.
Collections > Case Processes	Core.TaskProcessDefinition	Core.WorkdaySchedule Core.TaskDefinition Core.TaskProcessDefinitionMap	The general settings, Tasks and Assigned Case Types configured for the Case Process in System Management > Collections > Case Processes.

Collections > Case Queues	Core.TaskQueue	Core.TaskQueueGroup Core.TaskQueueUser tblLookup	The general settings, Assigned Users, and Assigned Groups configured for the Case Queue in System Management > Collections > Case Queues, as well as the department assigned to the case queue and configured in System Management > Field Configurations.
Collections > Case Tasks	Core.TaskDefinition	Core.TaskDefinitionProperty Core.TaskQueue Core.TaskResultDefinition Core.TaskEscalationDefinition Core.TaskDefinitionMap Core.WorkdaySchedule	The general settings, Instructions, Assigned Case Types, Escalation, and Results configured for the Case Task in System Management > Collections > Case Task.
Collections > Event Processing	Core.EventPair	Core.DelayedEvent Core.DelayedEventPair Core.EventPairAction Core.EventPairEvent Core.EventPairRuleElement	The general settings, including any time delay configurations, as well as the Event(s), Action(s), and Rules configured for the Event process in System Management > Collections > Event Processing.
Collections > Screens	Core.Screen	Core.ScreenType Core.ScreenPanelEditScreen Core.ScreenPanel Core.ScreenRuleElement tblAreaScreen Core.Screen Core.ScreenGroup Core.ScreenUser Core.ScreenItem Core.ScreenInteraction	The general settings, Panels, Buttons, Interactions, Assigned Account Types, Assigned Areas, Assigned Users, and Groups configured for the Screen in System Management > Screens.

Communication > Emails	tblEmail	tblEmailField Core.CommunicationRoleType	The general settings, Assigned Roles, and design configured for the Email in System Management > Communication > Emails.
Communication > Letters and Forms	tblLetterType	tblLetter	The general settings, Criteria, and Assigned Roles configured for the Letter in System Management > Communication > Letters and Forms.
Cost Centers	tblChargeOffCostCenter		The settings configured for the Cost Center in System Management > Cost Centers.
Custom Fields	Core.CustomField	tblLookupType	The settings configured for the Custom Field in System Management > Custom Fields. While Calculated Fields defined in System Management > Custom Fields are available for import and export and may be included as related items in export packages, they may cause errors, or the calculations may be incorrect upon import into the target environment.

Dashboards	tblDashboard	tblDashboardDetail tblCategoryMapping tblDashboardGroup tblDashboardUser	The general settings, Design, Assigned Categories, Assigned Users, and Assigned Groups configured for the Dashboard in Dashboards on the Ribbon. This includes any extra details that the Workflow Queue Detail, View, and Charting web part types store in the *WebPartParameter* field in *tblDashboardDetail* records.
Dialers > Dialer Return Codes	tblReleaseCode	tblWorkflow	The settings configured for the Dialer Return Code in System Management > Dialers > Dialer Return Codes.
Exports	tblInterfaceProfile	tblInterfaceSubType tblInterfaceField tblInterfaceBaseType tblInterfaceQueue tblRuleGroup	The General settings, File Details Fields, Schedule, and Criteria configured for the Export in System Management > Exports.
Field Configurations	tblLookupType		The Lookup Values configured for the Lookup in System Management > Field Configurations.
GL Accounts	tblGeneralLedger	tblChargeOffTransactionCodePostingRule tblGLGroup tblGLUser	The general settings, Assigned Users, and Assigned Groups configured for the GL Account in System Management > GL Accounts.

Groups > Performance Groups	tblPerfGroup	tblUserPerfGroup	The general settings, Assigned Users, and Assigned Queues configured for the Performance Group in System Management > Groups > Performance Groups.
Groups > Security Groups	tblGroup	tblGLGroup tblGLUser tblQueueGroup tblChargeOffTransactionCodeGroup Lending.QueueGroup Core.ScreenGroup Lending.AccountRestrictionGroup Lending.ApplicationSourceGroup Core.TaskQueueGroup tblDashboardGroup tblViewGroup tblWorkflowGroup tblReportGroup tblUserGroup tblAreaGroup tblTaskQueueGroup	The general settings, Permissions, Assigned Users, Assigned Screens, Assigned Workflows, Assigned Dashboards, Assigned Views, Assigned Reports, and Assigned Areas and Lending Settings configured for the Security Group in System Management > Groups > Security Groups.
Hyperlinks	tblHyperlink	tblAreaHyperlink	The general settings and Assigned Areas configured for the Hyperlink in System Management > Hyperlinks.
Interest Rates	tblChargeOffInterestRateType	tblChargeOffInterestRate	The Summary and Rates configured for the Interest Rate in System Management > Interest Rates.
Lookup	tblLookup	tblLookupType Lending.VendorType tblCompanyTypeMapping Lending.ApplicationSourceGroup Lending.ApplicationSourceUser Lending.AccountRestrictionUser Lending.AccountRestrictionGroup	The Lookup Values configured for the Lookup in System Management > Lookups.
Payment Types	tblPaymentType		The settings configured for the Payment Type in System Management > Payment Types.

Reports	tblReport	tblReportGroup tblCategoryMapping tblUserReport tblReportRuleGroup tblReportField File	The Define settings, Fields, Criteria, Schedule, Assigned Users, Assigned Groups, and Assigned Categories configured for the Report in Reports on the Ribbon.
Role Types	Core.RoleType	Core.CommunicationRoleType	The settings configured for the Role Type in System Management > Role Types.
Share Types	tblShareType		The settings configured for the Share Type in System Management > Share Types.
Transaction Codes	tblChargeOffTransactionCode	tblChargeOffTransactionCodeGroup tblChargeOffTransactionCodeUser tblChargeOffTransactionCodePostingRule	The general settings, Posting Rules, Assigned Users, and Assigned Groups configured for the Transaction Code in System Management > Transaction Codes.

Users	tblUser	tblTaskQueueUser tblGLUser Lending.QueueUser Core.ScreenUser Lending.ApplicationSourceUser Lending.AccountRestrictionUser tblOrgUser tblViewUser tblUserFunction tblWorkflowUser tblUserReport tblUserPerfGroup Core.TaskQueueUser tblDashboardUser tblUserGroup tblCategoryMapping tblAreaUser	The User Information, Company Information, Personal Information, Collection Settings, Assigned Security Groups, Permissions, Assigned Collections Screens, Assigned Lending Screens, Assigned Workflows, Assigned Dashboards, Assigned Views, Assigned Reports, Assigned Areas, Assigned Categories, and Restrictions and Lending Settings configured for the User in System Management > Users. User Credentials (Credentials tab in System Management > Users) are not included in export packages.
Views	tblView	tblCategoryMapping tblViewGroup tblViewField tblView tblRuleGroup	The general settings, Fields, Criteria, Assigned Users, Assigned Groups, Assigned Categories, and Charts configured for the View in Views on the Ribbon. Advanced views are not included in export packages.

Workday Schedules	Core.WorkdaySchedule	Core.WorkdayScheduleCalendar	The Schedule settings and Days configured for the Workday Schedule in System Management > Workday Schedules.
Workflow > Workflow Reason Codes	tblReasonCode	tblCategoryMapping	The general settings and Assigned Categories configured for the Workflow Reason Code in System Management > Workflow > Workflow Reason Codes.
Workflow > Workflow Task Queues	tblTaskQueue	tblTaskQueueGroup tblTaskQueueUser	The general settings, Assigned Users, and Assigned Groups configured for the Task Queue in System Management > Workflow > Workflow Queues.
Workflow > Workflows	tblWorkflow	tblWorkflowUser tblWorkflowAccountType tblWorkflowCaseType tblWorkflowGroup tblCategoryMapping tblWorkflowArea tblReleaseCode tblWorkflowStep	The general settings, Design, Assigned Account Types, Assigned Case Types, Assigned Users, Assigned Groups, Assigned Categories, Assigned Areas, Fields, and Solutions configured for the Workflow in System Management > Workflow > Workflows.

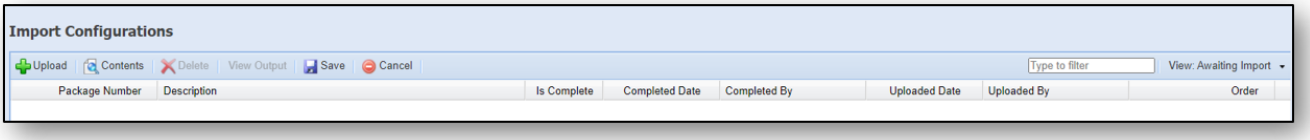
Rule Items

All rules associated with an Item are always included in the package because they are necessary for the Item to function in the target environment. Once imported into the target environment, they automatically function as they did in the source.

Additionally, all Categories in the Rule Application are included in Configuration Manager. Administrators can configure an export to include individual rules by choosing the Rules > Accountservicing > Category and assigning the desired rule(s) to the export configuration.

Configuring an Import

The Import Configurations page can be accessed from System Management > Configurations > Import Configurations to provide system administrators with the ability to upload the items for import through Configuration Manager.



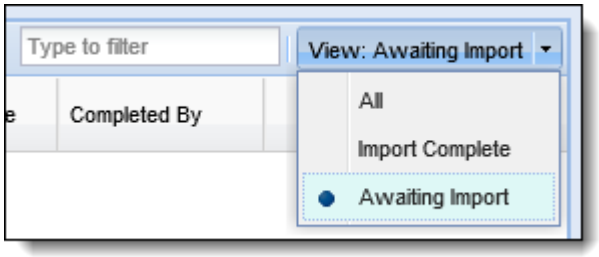
This page displays information about each Import package within the following columns:

Column	Description
Package Number	Displays the next sequential number for all uploaded packages.
Description	Displays the description entered when the package was uploaded.
Is Complete	Displays a ☑ when the package has been imported. This column is blank when the package has not been imported.
Completed Date	Displays the date that the import was completed.
Completed By	Displays the name of the user who completed the import.
Uploaded Date	Displays the date that the Import package was uploaded.
Uploaded By	Displays the name of the user who uploaded the Import package.
Order	Displays the sequential order of the processed imported files that are queued in the database.

From the Import Configurations page, system administrators can perform the following actions:

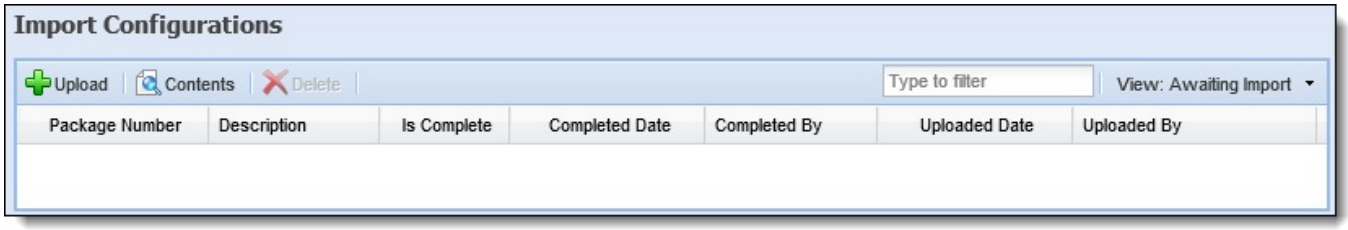
Button	Description
Upload	Click this button to add a new package for import.
Contents	Click this button to view the items included in the package.
Delete	Click this button to remove an import from the list.
Filter Box	Use this box to filter the imports in the list by description. Any text can be entered to narrow down the items displayed on the page.

The default view of the Import Configurations page is **Awaiting Import**, which lists all of the packages that have yet to be imported. When first using the Configuration Manager feature, this list is empty. To change the view, click the **View** drop-down. Select **All** to show all packages or **Import Complete** to view package imports that have been completed.

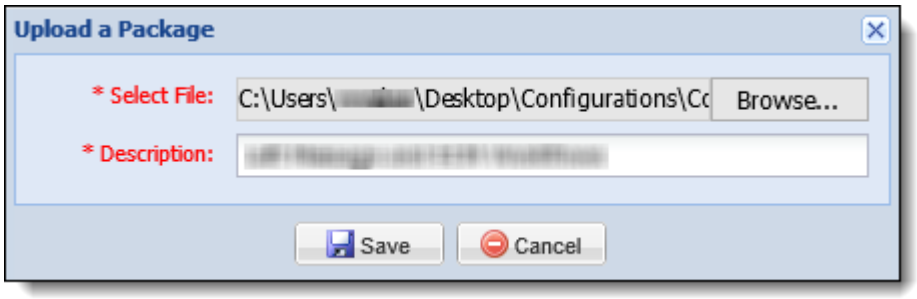


Uploading Import Items

To begin the Import process, click Upload.

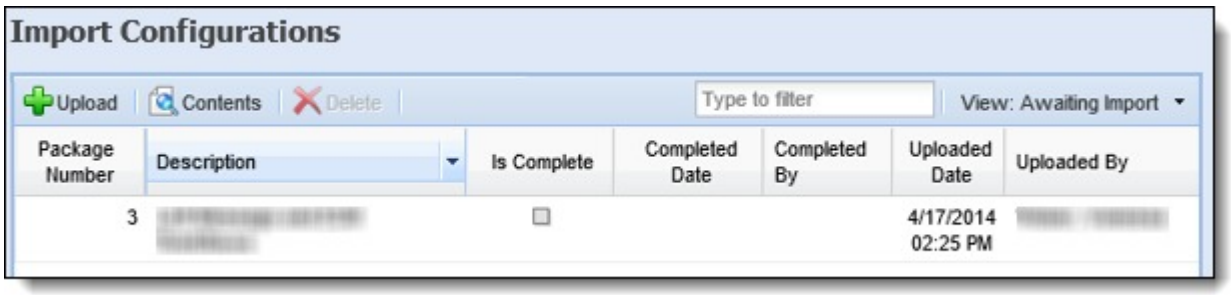


The Upload a Package window appears. Click **Browse** to browse to the location of the file to import and provide a description of the file so its purpose is clear.



Once the file has been identified, click Save.

The package is added to the Awaiting Import list.



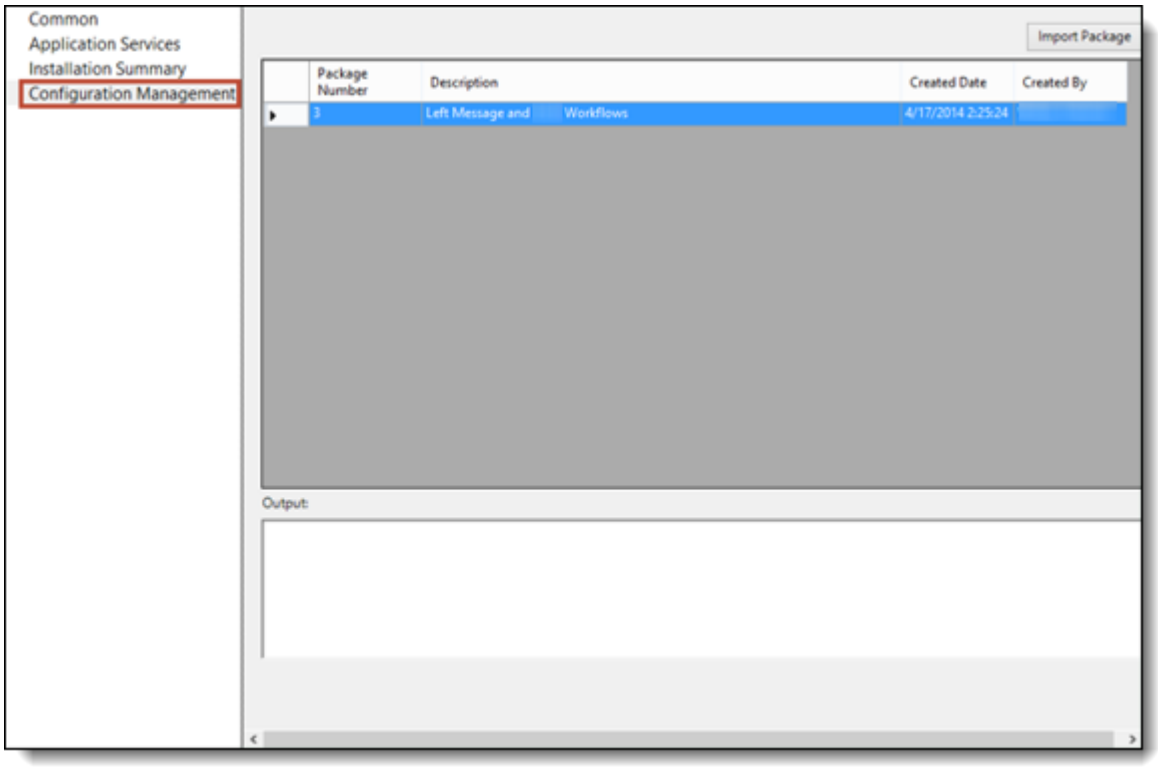
To complete the import, contact an IT resource to run the import process on the server.

> A package remains in the Awaiting Import list until it is imported or deleted. For more information on removing an import item from the list, please see Deleting Import Items.

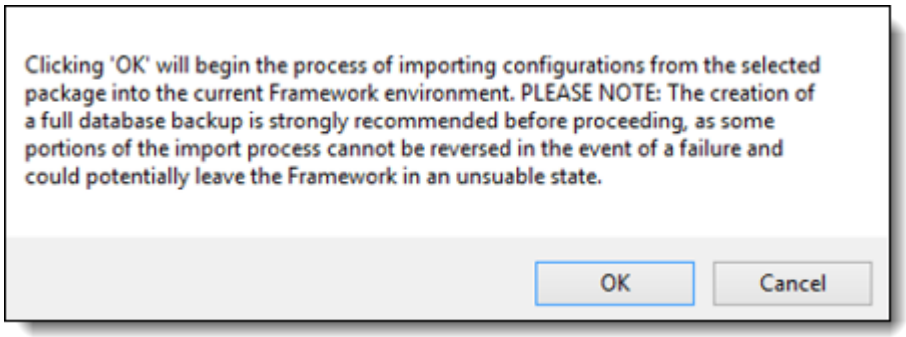
Running the Import Process on the Server

> Because this process makes changes to the target database, this should only ever be executed off-hours. A backup of the database should be taken immediately before running the import.

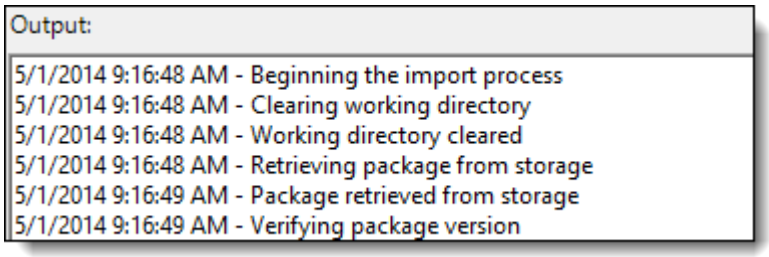
To run the import process, log on to the Temenos Infinity web/app server and locate Server Manager ("Akcelerant.ConfigurationManager.exe") located in the C:\Configuration folder. Right-click on the exe and select **Run as Administrator**. When Server Manager opens, click **Configuration Management** in the menu on the left.



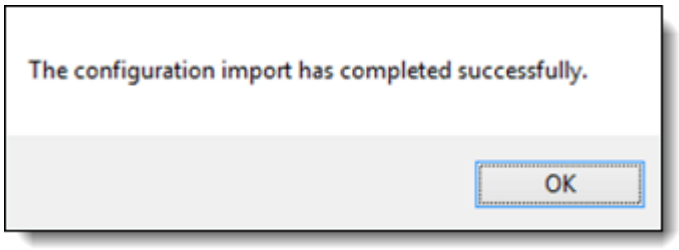
Click to highlight the package to import and click the **Import Package** button. A prompt appears confirming that the import is ready to be run. Click **OK**.



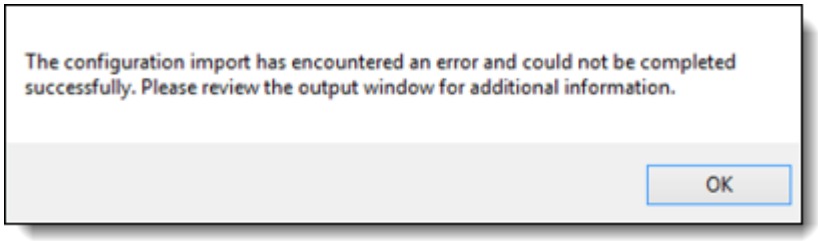
The Output window provides a running log of the status of the import.



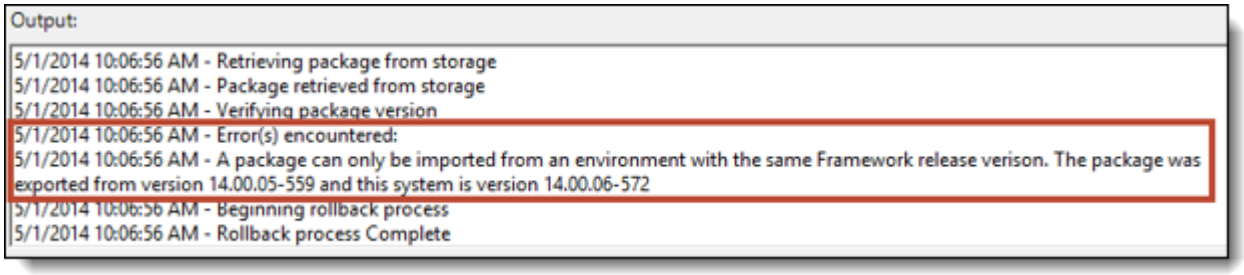
Once the import is finished, a message appears stating the success or failure of the import. The following message appears if the import is successful:



The following message appears if the import is unsuccessful:



The log specifically states the issue with the import. Please see the Troubleshooting section of this topic for more information regarding common causes of import failure.



The import consists of different stages, as different types of items each require their own method of updating the target system. The import process takes snapshots of the database at each stage so if an error does occur, the import can roll back from the stage that caused the error instead of having to roll back the whole import. While this ensures the target system is not left in a compromised state, it is still strongly advised for the institution to make their own database backup as a guaranteed protection against catastrophic failure.

> All items except custom fields that have already been created are rolled back in the event of a failure.

> Please contact Temenos Customer Care, prior to restoring the database, if the import fails. Customer Care can assist with troubleshooting and resolving any failure issues.

Upon completion of the Import process, the import package is removed from the Awaiting Import list on the Import Configurations page in Temenos Infinity. It can now be found on the Import Complete list.

The import process is now complete and all configurations from the source environment are available in the target environment.

Importing Configuration through EXE

- Users can import the configuration without accessing the Sever Manager as mentioned in the above sections of Configuration Manager with appropriate Change permissions to import to configurations through the EXE.

  > The EXE needs to mimic the functionality of the 'Import Package' button on the **Configuration Management** tab in the Server Manager.

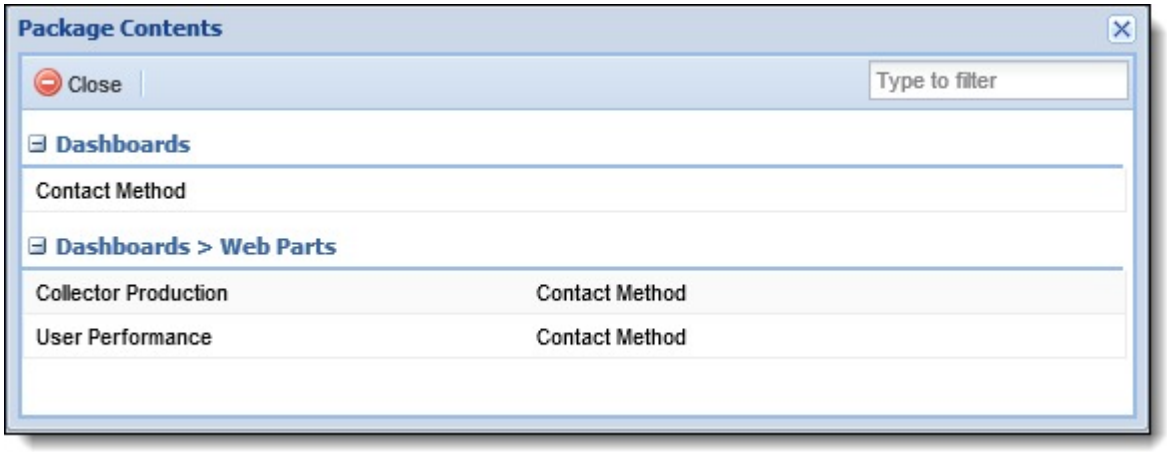
- The EXE will run nightly.

- Will import all files that are queued in the database and process in a sequential order as defined by the Order column.
    - Files are processed sequentially in ascending order.
- Process status of success or failure will be logged to tblProcessLog in the database.

Viewing Package Contents

The View Contents function enables administrators to see a list of all entities included in the Import package.

- To view the items included in the Import package, click Contents.
- The Package Contents window appears listing all items included in the Import package.



- When finished viewing the package contents, click Close to return to the Import Configurations page.

Deleting Import Items

- To remove an Import package from the Import Configurations page, highlight the item within the list and click Delete.
- A confirmation message appears to confirm that the configuration package should be deleted. Click **Yes** to delete the package or **No** to cancel the deletion and return to the Import Configurations page.

Identifying Imported Items

Because an import can happen at any time and may be bi-directional, it is important to record and track in the database where items came from. A Source Globally Unique Identifier field (Source GUID) is added to all database tables that are capable of copying data, so a source is easily identifiable. After taking a copy of the source database and restoring it in the target environment, all items have matching Source GUIDs. Any changes made in the source and exported to the target find the matching Source GUID and overwrite that item in the target environment. This overwrites the existing configuration of that item in the target environment.

For example, a workflow originally called “Charge Off” in both the source and target environments is renamed to “Charged Off Status” in the source environment. When imported into the target environment, it overwrites the “Charge Off” workflow to “Charged Off Status,” as it has the same Source GUID.

Deleting an item in one environment and creating a new item with the same name to replace it does not work since a unique Source GUID is created in the database, which will cause an issue with the import.

For more information on Source GUIDs, please see the Unique Names/Values That Cause an Import to Fail section of this topic.

> Source GUIDs only exist in the database; they are never visible from the application.

Imported items can also be identified by the system User Id (-10) and a date and time of creation of the export package. Normally when changes are made in Temenos Infinity, the User Id of the person who made the change is recorded.

Import and Rollback Processing Stages

The following table outlines the stages of processing that occur during an import into the target environment and the rollbacks that can occur at each stage.

Stage of Import	Title of Stage	Details
1	Initialization Processing	Upon launching Server Manager and selecting the package to import on the Configuration Management screen, the following actions are performed: • Delete contents of [SharePath]\Configuration. • Retrieve zip file from database and extract to SharePath. • Package version is verified. • Package is read into memory. If all of these actions are successful, the import continues to stage 2. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.
2	Initial Rule Application Operations	For each rule application included in the package, the import performs the following actions: • Load source rule application into memory. • Check out and load target rule application into memory. • Copy rules included in package. If all of these actions are successful, the import continues to stage 3. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.

Stage of Import	Title of Stage	Details
3	Backup Items Based on the Operations That Need to be Completed	For items included in the package, the import performs the following actions: • Create database snapshot. • Backup items from SharePath to [SharePath]\Configuration. If all of these actions are successful, the import continues to stage 4. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.
4	Database Operations	The import performs the following actions: • Database script processing • Gather updated references (Lookup IDs, etc.) If all of these actions are successful, the import continues to stage 5. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.
5	Custom Field Operations	The import performs the following actions: • Check out and load target rule application into memory, if not already loaded. • Create custom fields. If all of these actions are successful, the import continues to stage 6. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager. The custom fields' database column name and Core.CustomField Source GUID are not rolled back in the event of a failure; these items remain in the target environment.

Stage of Import	Title of Stage	Details
6	Secondary Rule Application Operations	For each rule application included in the package, the import performs the following actions: • Sync lookups in the target rule application • Process each rule that was added in stage 2 to ensure the lookup values are correctly updated with their new IDs. If all of these actions are successful, the import continues to stage 7. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.
7	Import Files	The import performs the following actions: • Update file names. • Update tblLetter with updated file name. If all of these actions are successful, the import continues to stage 8. If an action fails, the import rolls back and a failure message is returned in the log displayed on the Configuration Management screen in Server Manager.
8	Import Cleanup/Commit/Finalization	The import performs the following actions: • Validate and save updated copies of rule apps. • Set Core.ConfigImportHistory record as IsImportCompleted = True. • Delete contents of [SharePath]\Configuration. • Delete snapshot. If all eight stages are successful, an import success message is returned in the log displayed on the Configuration Management screen in Server Manager. If an action fails, an import failure message is returned in the log.

The following actions are performed during each import rollback:

- If a database update has occurred, the database is restored from the snapshot.
- If letter processing has occurred, the letters are restored from the backup.
- The contents of [SharePath]\Configuration are deleted.
- The snapshot is deleted.

If all of these actions are successful, a rollback success message is returned in the log displayed on the Configuration Management screen in Server Manager. If an action fails, rollback processing is aborted and a failure message is returned in the log.

Troubleshooting

The following section provides system administrators assistance in troubleshooting some common issues that can result in import failure:

- Unique Names/Values that cause an Import to Fail
- Issue #1: Source and Target Versions
- Issue #2: Source GUIDs not matching
- Issue #3: Functionality has a Rule that no longer exists in the Rule Application

Unique Names/Values That Cause an Import to Fail

If any of the below fields are sent from the source system to the target system with the same name but a different Source GUID in the target database, the import will fail.

For example, if the source (test) and target (production) environments are identical, and an item is deleted from test then rebuilt with the exact same information, a new database record is created with a different Source GUID. There are no problems exporting the item, but when importing it, the import fails because there is an item with the same name and a different Source GUID.

If the import fails for this reason, an error similar to the following is received in the log:

```
Error on line 100: Validation error occurred in
#copy_tblLookupType. LookupType=CUSTOM_DMV_TRANSACTIONS. SourceGuid=7BB037C0-
153A-44E3-A39F-03E25138CEE9
```

To resolve this error, change the name of the item in the source environment prior to importing into the target environment.

If Configuring this Item	This Value Must be Unique	Path to Temenos Functionality
Account Type	Account Type Code	System Management > Account Types
Area	Area Name	System Management > Areas
Branch	Branch Code	System Management > Branches
Case Process Definition	Name	System Management > Collections > Case Processes
Case Task	Name	System Management > Collections > Case Tasks
Case Type	Case Type Name	System Management > Case Types
Category	Category Name	System Management > Categories
Charge Off Cost Center	Title	System Management > Cost Centers
Charge Off Interest Rate Type	Type	System Management > Interest Rates
Charge Off Transaction Code	Title Charge Off Transaction Code	System Management > Transaction Codes
Company	Company Name Company Code	System Management > Address Book > Companies

Dashboard	Dashboard Name	Ribbon > Dashboards Icon
Email	Email Name	System Management > Communication > Emails
General Ledger	Account Number Account Title Fully Qualified Account Number	System Management > GL Accounts
Group	Group Name	System Management > Groups > Performance Groups and System Management > Groups > Security Groups
Hyperlink	Hyperlink Name	System Management > Hyperlinks
Letter Type	Letter Type Code	System Management > Communication > Letters and Forms
Lookup Type	Lookup Type	System Management > Field Configurations > System Lookups
Meta Data	Field Label	System Management > Screens
Payment Type	Payment Type Code	System Management > Payment Types
Performance Group	Performance Group Name	System Management > Groups > Performance Groups
Queue	Queue Name	System Management > Collections > Collection Queues
Release Code	Release Code Name	System Management > Dialers > Dialer Return Codes
Report	Report Name	Ribbon > Reports Icon
Role Type	Role	System Management > Role Types
Screen	Name	System Management > Screens
Service Ticket Type	Name	System Management > Service > Service Ticket Type
Case Queue	Name	System Management > Collections > Case Queues
User	Username	System Management > Users
View	View Name	Ribbon > Views Icon
Workday Schedule	Schedule Name	System Management > Workday Schedules
Workflow	Name	System Management > Workflow > Workflows
Workflow Step Work Type	Code	System Management > Workflow > Workflow Steps

Issue #1: Source and Target Versions

A common cause of import failure is the source and target environments being on different Temenos Infinity releases.

Resolution: To correct this issue, a backup of the target (production) environment needs to be restored in the source (test) environment. The source environment then needs to be reconfigured and the export needs to be re-run.

Issue #2: Source GUIDs Not Matching

Another common cause of import failure is Source GUIDs (unique identifiers of each item in the database) not matching between environments.

Example: For example, when a database backup is taken from production and restored to test, the Source GUIDs are identical because the database is the same in both environments. If a custom field was then deleted from the test environment and recreated in the test environment and exported to production, the import would fail because the Source GUID for that custom field is now different, because it was assigned a new one during the recreation.

Resolution: To prevent this issue, ensure Configuration Manager users are not deleting and re-creating items that previously existed in the database backup.

Issue #3: Functionality Has Rule that No Longer Exists in Rule App

A cause of failure is if a functionality item has been selected to export that has an assigned rule that no longer exists in the rule app.

Example: For example, a workflow is configured with a rule that has been deleted. An error, stating the item (workflow) needs to be resaved, is received when trying to add the workflow to the export, preventing the export package from being created.

Resolution: To correct this issue, open and resave the functionality item in Temenos Infinity, such as the workflow in the above example. The functionality item needs to be resaved to remove the reference to the rule that no longer exists. Be aware of other pieces of configurations in the entity that have rules associated with them that could have been deleted.

Configuring Middleware Rest Core

This feature provides a new middleware for the core interfaces in Collections and allows the institutions to utilize the middleware technologies to integrate the Temenos Infinity Collections module with the back and core systems.

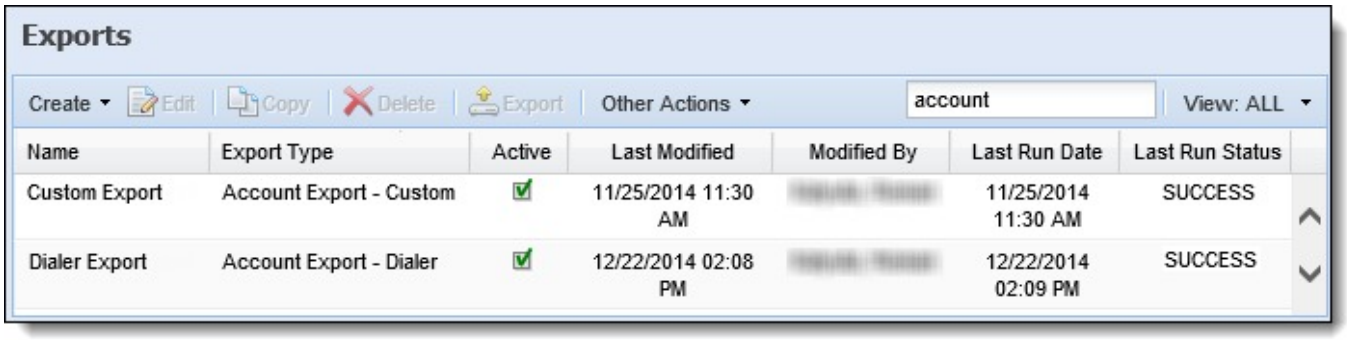
A new layer of abstraction is introduced which lies between the Temenos Infinity and the Middleware system.

> The technical swagger documents are created to provide an overview of authentication, endpoint definition, code snippets and example references.

Exports

Data can be sent to Third Parties using the export function and a fixed-width or delimited text file that is created outside of Temenos Infinity.

The Exports page in System Management > Exports provides system administrators with the ability to create and manage Account, Case,, and Comment in Temenos Infinity.



The grid within this page displays the following columns of information for each export:

Column	Description
Name	Displays the name of the export.
Export Type	Displays the type of export selected within the Create drop-down.
Active	Displays a ☑ if the export is active in Temenos Infinity.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification.
Last Run Date	Displays the date and time the export was last run.
Last Run Status	Displays the status of the last export (Success, Fail).

From the top toolbar, administrators are provided with the ability to create, edit, copy, and delete an export, as well as perform the following actions:

Button	Description
Export	Click to execute an "On Demand" export. Exports must be executed in this way if they are not set to run automatically on a schedule. Export processes are recorded within Help > Processes in the Ribbon Bar.

Other Actions	Select the drop-down, and click Letter Export Settings to define the Connection Parameters required to export letter files to a Third Party. These settings are used when a letter is set to Outbound Export. Reference the following section for more information on Letter Export Settings: ▶ Letter Export Settings Letter Export Settings allow administrators to define the Connection Parameters required to export letter files for Third Parties to process. These settings are used when a letter is set to Outbound Export. • Enter the File Name. • Select the Transmission Method (Network, SFTP (SSH), or FTPS (SSL). If SFTP or FTPS is selected, the Port field automatically populates with a port number. The System Administrator can overwrite this by entering in new numbers. • If Network is selected, the following fields display: • If SFTP(SSH) is selected, the following fields display: • If FTPS(SSL) is selected, the following fields display: • Enter in the required fields and click Save and Close. • The letter can now be exported via the caLetterExport.exe that runs as part of the scheduled daily processes

	Letter exports are not a standard custom export; therefore, letter exports do not populate within the Exports page once the Letter Export Settings are saved, and cannot be run on-demand. The Letter Export Settings are used to set the parameters for the Letter Export process, which is only controlled through the Processes tab in Server Manager (ProcessID 10), and not from the Exports page in System Management. When letters are exported, they are generated in one comma delimited file, with quote enclosed records for each letter in the file. During execution of the Letter Export process, the Process Log is updated to display a count of the total number of letters exported. This count includes the total number of letters exported, the total number exported successfully, and the total number of letters that failed the export, in the following format: Total Number of Letters: X, Letters Exported Successfully: X, Letters Failed: X. (where X = the total number of letters). Letter export functionality does not support the export of grid data. If a letter contains a grid, the letter exports with all content excluding the grid.

The Exports topic includes the following information to assist administrators with creating, copying, editing, and deleting an export:

- Export Types
- Export Attributes
  - General
  - File Detail
  - Fields
  - Schedule
  - Criteria
- Creating an Export
- Initiating an Export
- Editing an Export
- Copying an Export
- Deleting an Export

Export Types

The following export types are available within Temenos Infinity:

The export types available for a financial institution depend on the modules that are active in their environment.

- Account Exports
  - Custom
  - Assignment

    - Unassignment
    - Dialer
- Case Exports
- Comment Exports

Account Exports

Account exports enable institutions to configure accounts to be included within an export based on defined criteria.

Custom

Allows institutions to configure accounts and queues to be exported.

Assignment

Allows institutions to export accounts to their respective company when assigned to Third Party queues.

> The list of companies is defined in System Management > Address Book > Companies.

Unassignment

Allows institutions to export accounts to their respective company when unassigned to Third Party queues.

> The list of companies is defined in System Management > Address Book > Companies.

Dialer

Allows institutions to export accounts to dialers when unassigned from Dialer queues.

Case Exports

Case Exports allow institutions to use case level fields to set export criteria. This export process can be used to recreate the case structure in an outside system to view or create custom functionality.

Comment Exports

Comment Exports allow institutions to use workflow level fields to set the export criteria.

The Field Selector list and the Criteria Field list for primary applicants are now enhanced to include the below fields.

- Application > Applicants > Primary Applicant > First Name
- Application > Applicants > Primary Applicant > Last Name
- Application > Applicants > Primary Applicant > Restriction Code

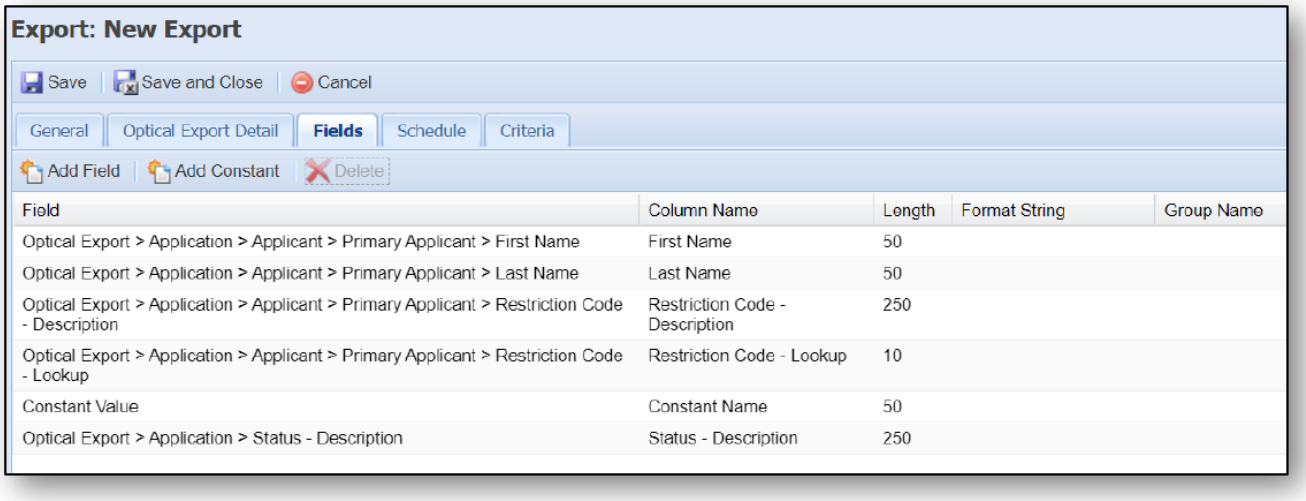
The Fleld Selector list and the Criteria Field list for application fields are now enhanced to include the below field.

- Application Status

Add Constant button in the **Fields** tab, functions like the **Add Constant** button of other exports. For example, Custom Export. When **Add Constant** button is clicked by the user, a row is added to the grid where field, column name, length and group name can be defined.

The following columns are added In the **Fields** tab of Optical Export screen.

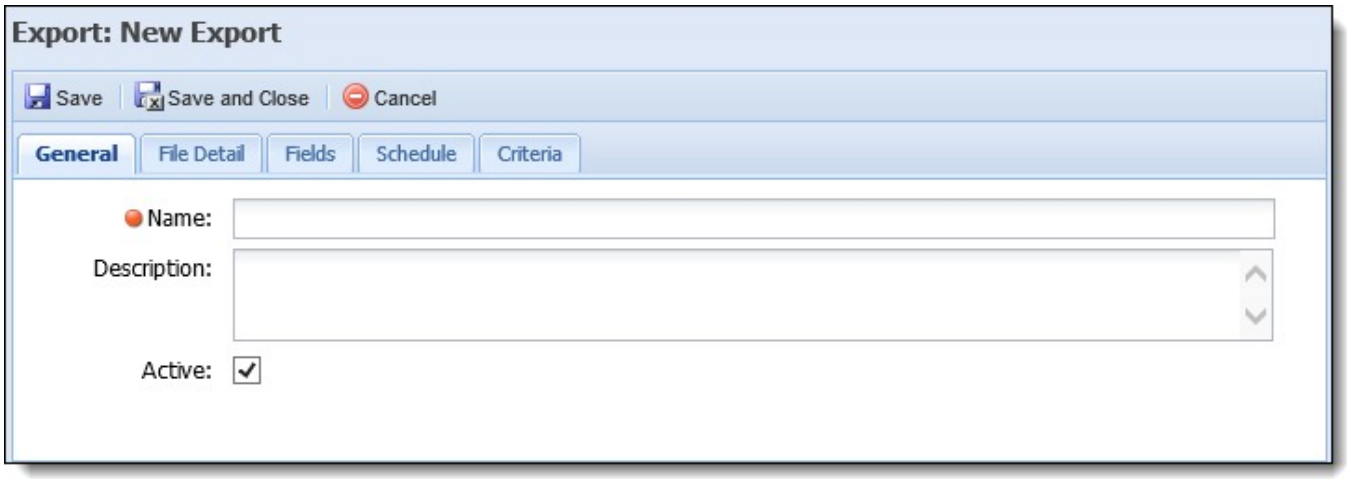
Column	Description
Field	This is an editable column and defaults to constant value.
Column	This is an editable column and defaults to constant value.
Length	This is an editable column and defaults to a value of 50.
Format String	This is a non-editable column and defaults to blank value.
Group Name	This is an editable column and defaults to blank value. Optical Export concatenates multiple export fields when; • Column Names match between the two fields and are case sensitive. For an exact match to occur, the case must match. • Group Names match between the two fields and are case sensitive. For an exact match to occur, the case must match.



Export Attributes

All Exports share common attributes that are defined when creating, copying, or editing an export.

General

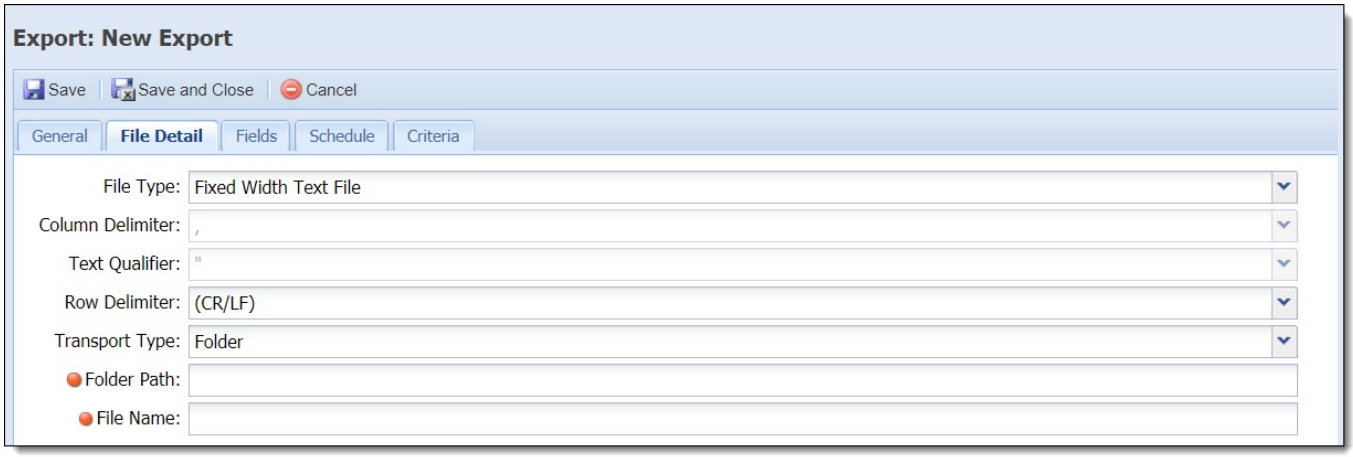


The following General attributes are defined within the General tab:

Attribute	Description
Name	Enter a unique name for the export. Exports of the same type must each have a unique name; therefore, an error is received when trying to save an export that includes the same name as an existing export of the same type.
Description	Enter a description for the export.
Active	Select the check box to activate the export. If the export is active, and the scheduled process is run, the export is executed.

File Detail

File Detail attributes enable the administrator to manage the file parameters associated with the export. The required attributes within this tab varies according to the Transport Type. In the example below, the following parameters display when FTP is the selected Transport Type:



The following File Detail attributes are defined within the File Detail tab:

Attribute	Description

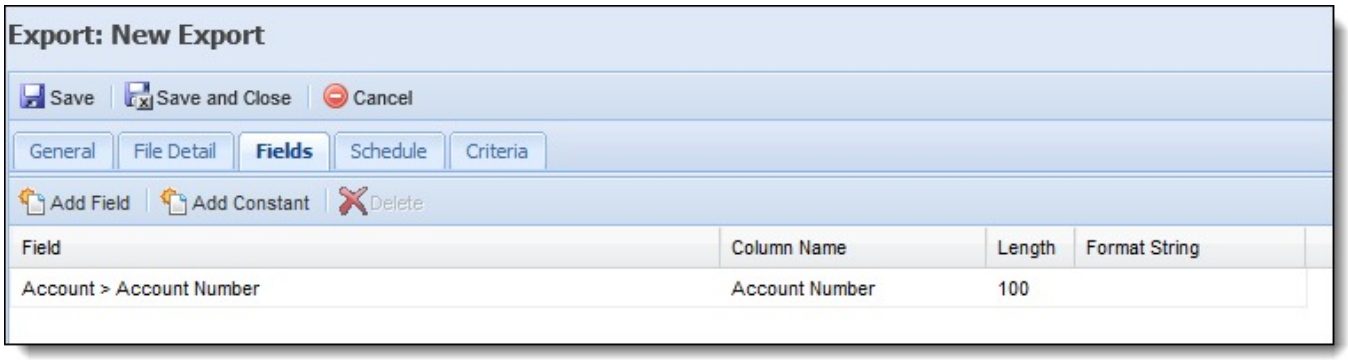
File Type	Select **Delimited Text File** or **Fixed Width Text File** from the drop-down list. Once the file type is chosen, only the fields associated with that file type are enabled. This field does not display for Metro2 Exports
Column Delimiter	Select a column delimiter from the drop-down list to identify how columns within the file are separated in the export. This field is only enabled when the File Type is Delimited Text File.
Text Qualifier	Select a Text Qualifier to identify how text displays in the file. For example, if **"** is inserted as the text qualifier, the fields in the export appear as follows: "Field 1," Field 2," etc. This field is only enabled when the File Type is Delimited Text File.
Row Delimiter	Select a Row Delimiter to identify how to distinguish rows of data in the file. This field does not display for Metro2 Exports
Transport Type	Select how the file is to be transported, from the drop-down list. The available choices are: • Folder • SFTP (SSH) • FTPS (SSL) When making this selection, it is important that the file transport type is secure.
Folder Path	If Folder is the selected Transport Type, enter the folder path for the location where the export file is to be placed on the server.
File Name	Enter the naming convention of the file, including the file extension, with no spaces.
SFTP Server	If SFTP is the selected Transport Type, enter the SFTP Server name. This parameter is required, if the Transport Type is set to SFTP.
SFTP UserName	If SFTP is the selected Transport Type, enter the SFTP UserName. This parameter is required, if the Transport Type is set to SFTP.
SFTP Password	If SFTP is the selected Transport Type, enter the SFTP Password. This parameter is required, if the Transport Type is set to SFTP.
SFTP Port	If SFTP is the selected Transport Type, enter the SFTP Port. By default, this parameter is set to 22. This parameter is required, if the Transport Type is set to SFTP.

FTPS Server	If FTPS is the selected Transport Type, enter the FTPS Server name. This parameter is required, if the Transport Type is set to FTPS.
FTPS UserName	If FTPS is the selected Transport Type, enter the FTPS UserName. This parameter is required, if the Transport Type is set to FTPS.
FTPS Password	If FTPS is the selected Transport Type, enter the FTPS Password. This parameter is required, if the Transport Type is set to FTPS.

Fields

Field attributes allow administrators to select the fields to include in the export.

At least one field must be included in every export.



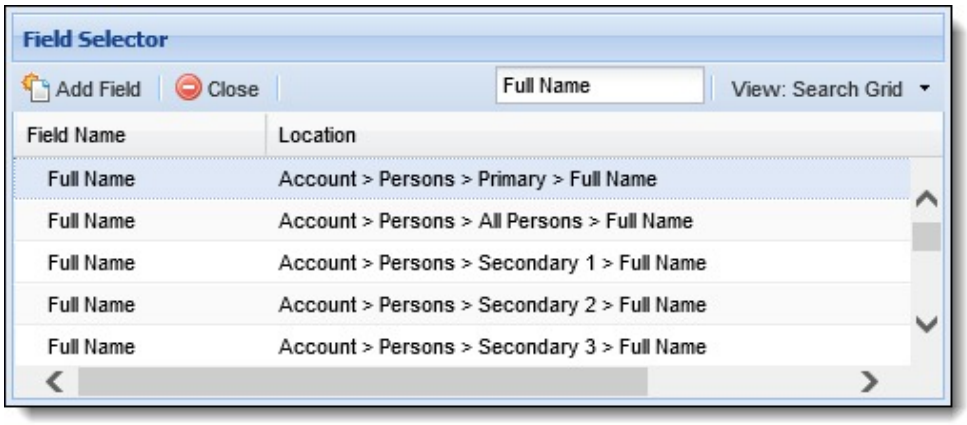
The grid within this tab displays the following information about each field included in the export:

Column	Description
Field	Displays the location of the field in Temenos Infinity.
Column Name	Displays the field name that appears in the export. This column pre-populates with the field name in the database, but can be modified by clicking within the column.
Length	Displays the length of the field in the export file. This column pre-populates with the field length in the database, but can be modified by clicking within the column.
Format String	Enables the ability to define the format in which date fields display in the export. When a date field is added to the export, this column becomes editable and provides the ability to select one of the following options from a drop-down: • mm/dd/yyyy • mm/dd/yyyy hh:mm • YYMMDD

From this tab, administrators are able perform the following actions:

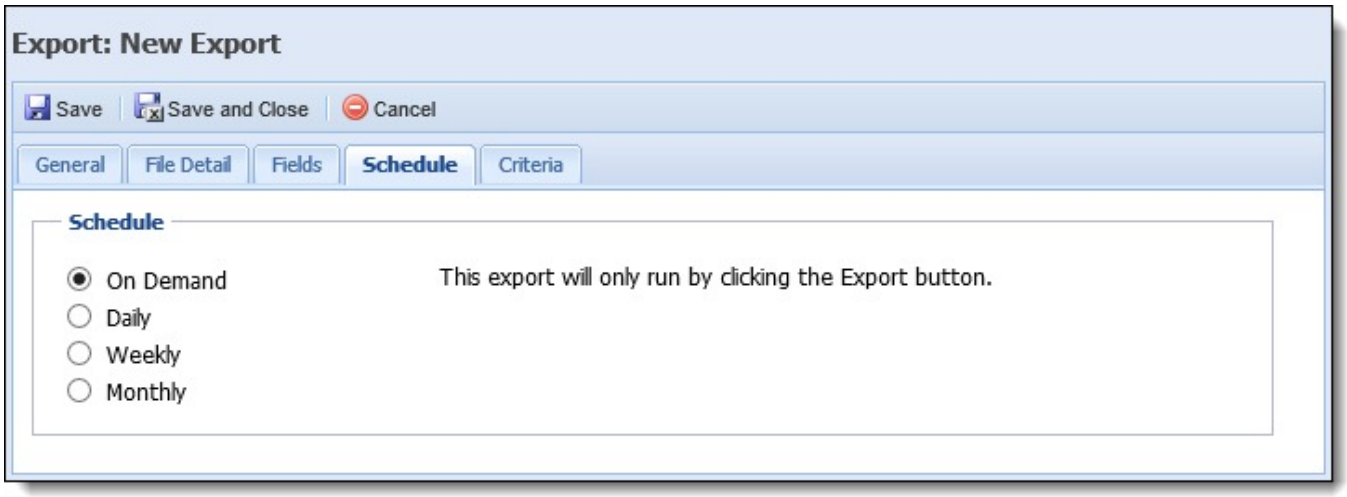
Button	Description

Add Field	Provides the ability to add fields to the Export. Clicking this button opens the Field List for the selected export type. The fields displayed in the list depend on the type of export being created. If creating a custom dialer export, an Include TCPA Consent Indicators field is available to capture consent to contact a phone number and be in compliance with the Telephone Consumer Protection Act. For additional information about TCPA Consent Indicators please see the Temenos Standard Dialer Interface Guide. If creating a Comment export, an Account folder and a Person folder display in the field list, both containing person information. The fields in the Person folder pertain to the person on which the workflow was run. Because a workflow/comment is always tied to a person, and may be tied to one or more accounts and/or a case, the Export may display multiple rows for the same workflow/comment depending on the combination of Account, Person, and Case fields chosen. • [redacted] • [redacted] • [redacted] The field list is a feature used throughout Temenos Infinity to define the fields to display on reports, views, and exports. It is also used in criteria building for reports, views, exports, and searches. Each field selector window looks the same regardless of how it is accessed. In the below example, the field selector has been accessed through the Fields tab when creating a new report. By default, the field selector opens in a tree format with expandable folders and sub-folders. **Field Tree** When using the Field Tree format, click the arrow next to the field name to expand or collapse the list of available fields. Expand each section until the desired field is

	found, or search for the field by entering text into the search text box, and hitting **Enter** on the keyboard. Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list. **Search Grid** To change the view of the field selector from a tree to a search grid format, click the **View** drop-down in the top of the field selector window, and select **Search Grid**. Using the Search functionality, locate the desired field by entering text into the text box, and hitting **Enter** on the keyboard. A list of results displays including the field name and location in Temenos Infinity.  Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.
Add Constant	Provides the ability to add a column to the export file and specify a value for each record in the column. Administrators have the ability to enter a date field constant enclosed in brackets. The constant is formatted as [TODAY +/- N] (where N is a number of days to add/subtract).
Delete	Highlight a row within the grid and click to remove the field from the export.

Schedule

Schedules can be added to an export to run the export automatically or on demand. When using a set schedule, exports can be run on a daily, weekly, or monthly basis. When **On Demand** is selected, the export only runs when Export is clicked within the toolbar on the Exports page.

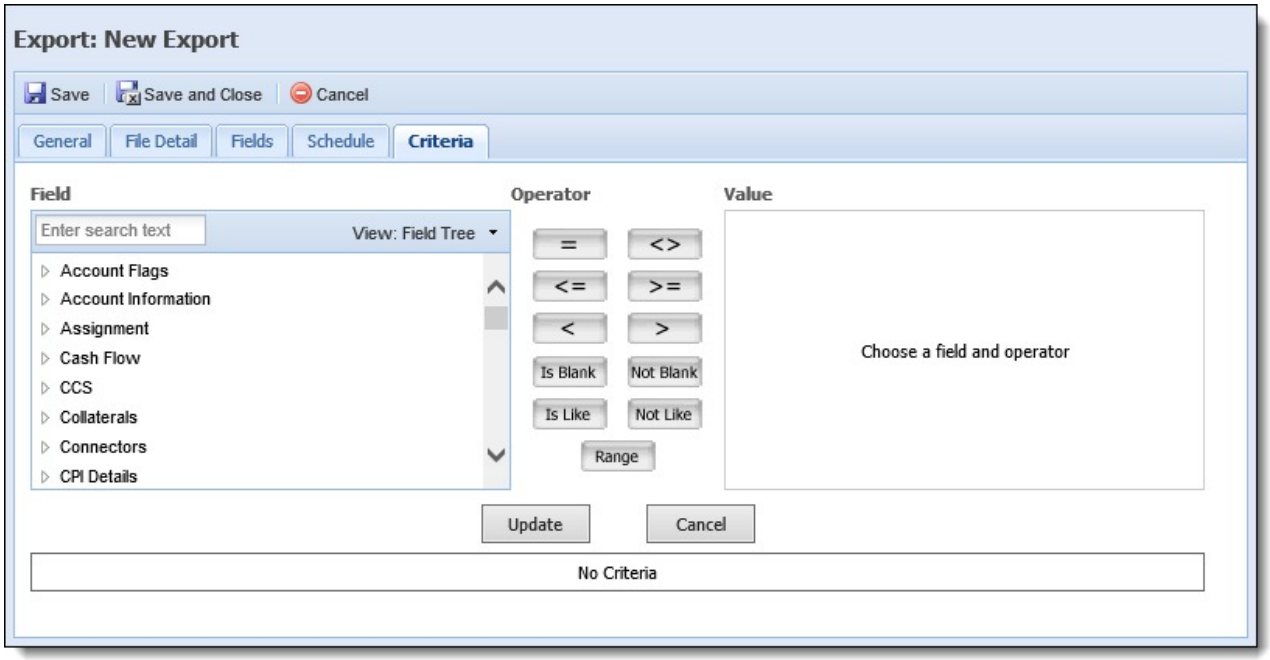


Criteria

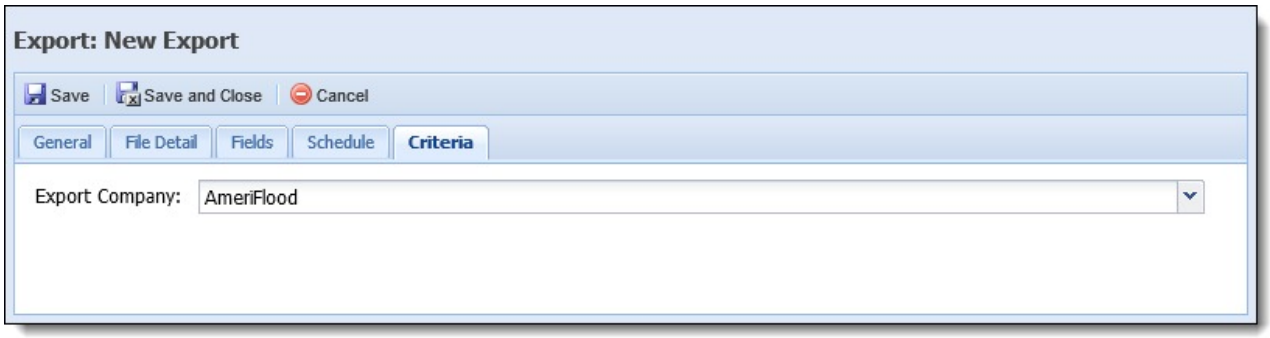
Within the Criteria tab, define the criteria an account, case,, and comment must meet in order to be included in the export using the criteria builder.

The criteria that can be set is dependent on the export type:

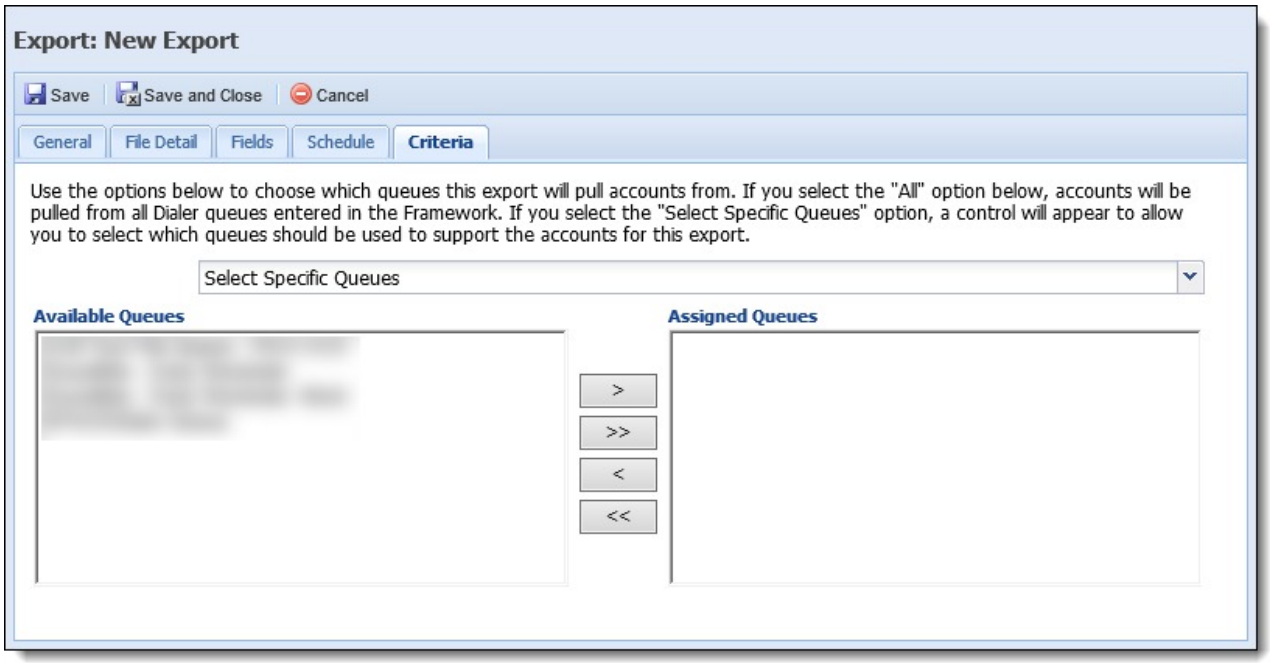
- **Account Custom Export** - Use the field list to set the criteria for the export.



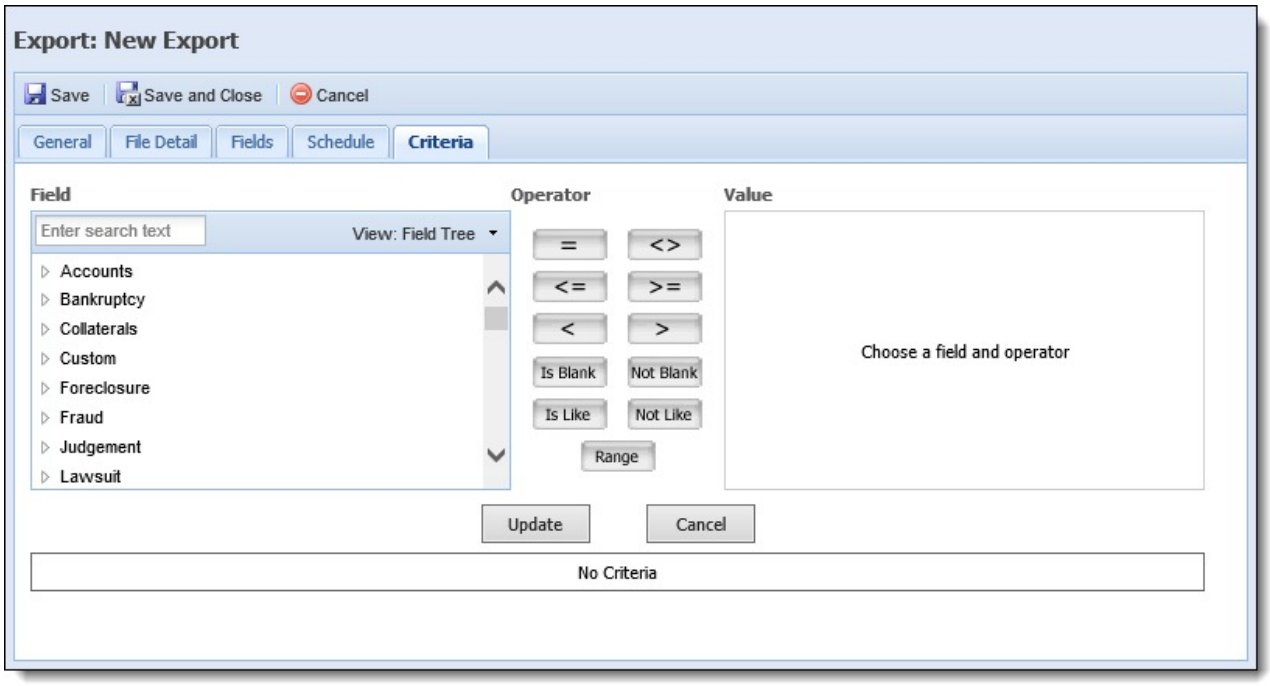
- **Account Assignment/Unassignment Export** - When accounts are assigned to Third Party queues they can be exported to the respective company when the export is configured. Accounts can also be unassigned. This is set in the Criteria tab as shown below. The list of companies is defined in System Management > Address Book > Companies.



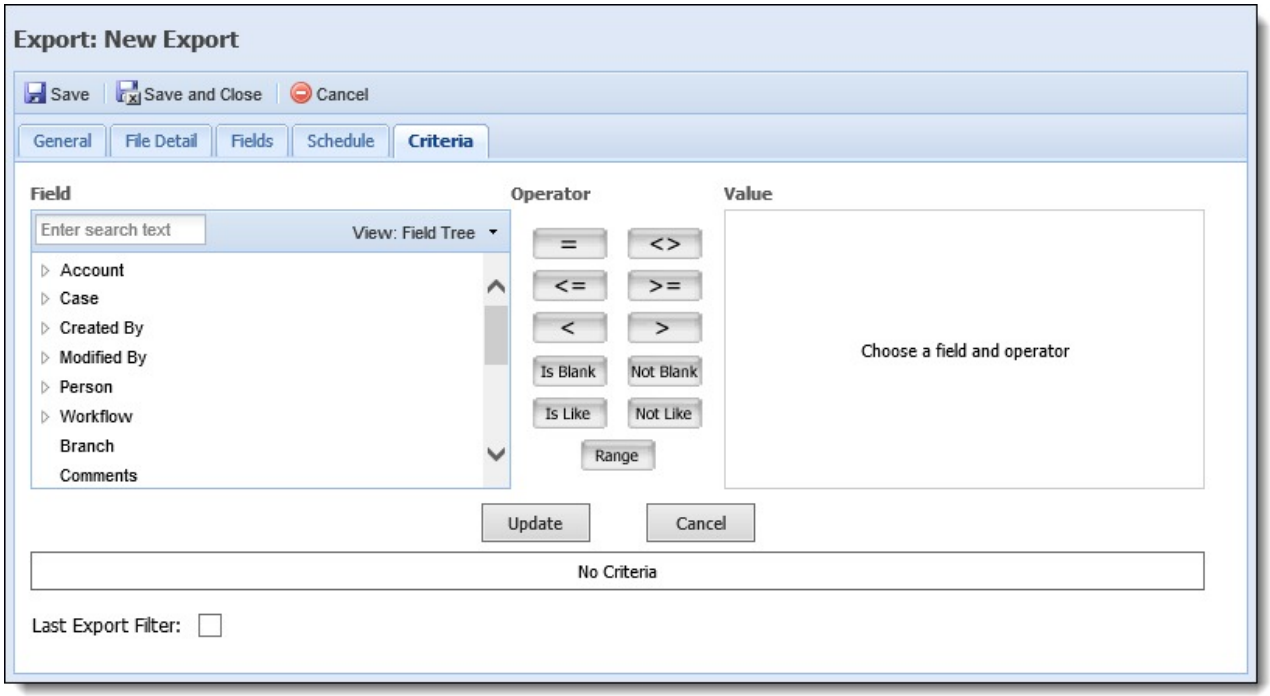
- **Account Dialer Export** - Use the options below to choose the queues from which this export pulls accounts. If the "All" option is selected, accounts are pulled from all Dialer queues in Temenos Infinity. If the "Select Specific Queues" option is selected, a control appears to select which queues should be used to support the accounts for the export.



- **Case Export -** Case Exports are used in the Collections module. The Case Export uses case level fields to set the criteria. This export process can be used to recreate the case structure in an outside system to view or create custom functionality.

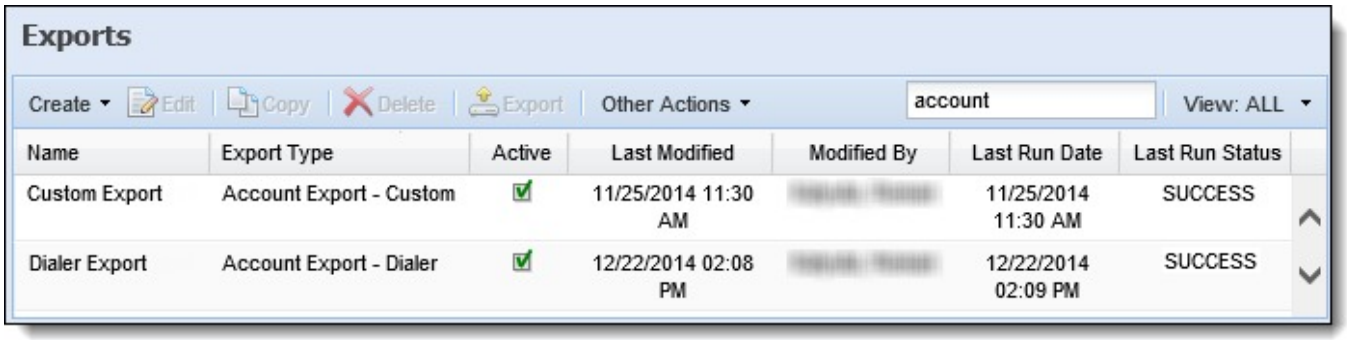


- **Comment Export** - The Comment Export uses the workflow level fields to set the criteria, such as workflow name, created date, etc. Select the **Last Export Filter** check box at the bottom of the screen to include any comments made since the last export date.



Creating an Export

To create a new Export, click Create, and select an export type.



Within the New Export screen, define the General Export attributes.

After all General attributes are defined, navigate to the File Detail tab to enter the file parameters associated with the export.

Upon completion of the file detail parameters, navigate to the Fields tab to add or remove the fields included in the export.

If desired, after all fields have been added, click within the Column Name and/or Length column(s) to make any necessary modifications. If a date field has been added, click within the Format String column to select a date format.

To change the order of the fields, drag and drop the field(s) into the desired position in the grid.

Once all fields have been configured, set the export schedule within the Schedule tab.

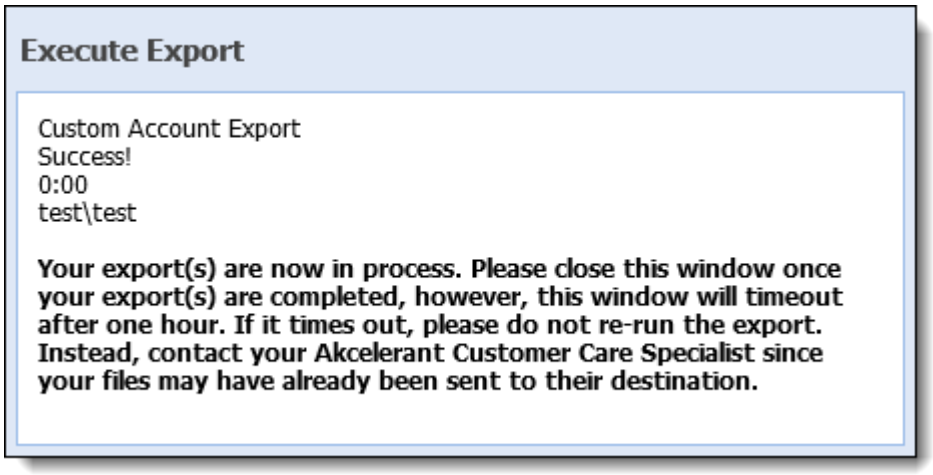
After the export schedule has been set, navigate to the Criteria tab to define the data to be included in the export.

Upon completion of all export attributes, click Save and Close to create the new export and return to the Exports page. The new export populates within the Exports grid.

Initiating an Export

To initiate an export that is configured to run on demand, select the export within the Exports grid and click Export.

A pop-up window appears stating that the export is executing. When finished executing, the pop-up window automatically updates to indicate the success or failure of the export, along with the time it took to execute, the location it was sent to and instructions to follow.



When finished reviewing the export status and instructions, close the pop-up window.

Editing an Export

- To edit an export, double-click on the desired export within the Exports grid or highlight the export and click Edit.
- The Edit Export screen appears.
- Navigate through the tabs and make any necessary changes to the export.
- When finished, click Save and Close to retain the modified export settings and return to the Exports page.

Copying an Export

- To copy an export, double-click on the desired export within the Exports grid or highlight the export and click Copy.
- The Copy Export screen appears.
- Update the name of the export within the General tab, and navigate through the other tabs to make any additional changes to the export.
- When finished, click Save and Close to create the new export and return to the Exports page.

Deleting an Export

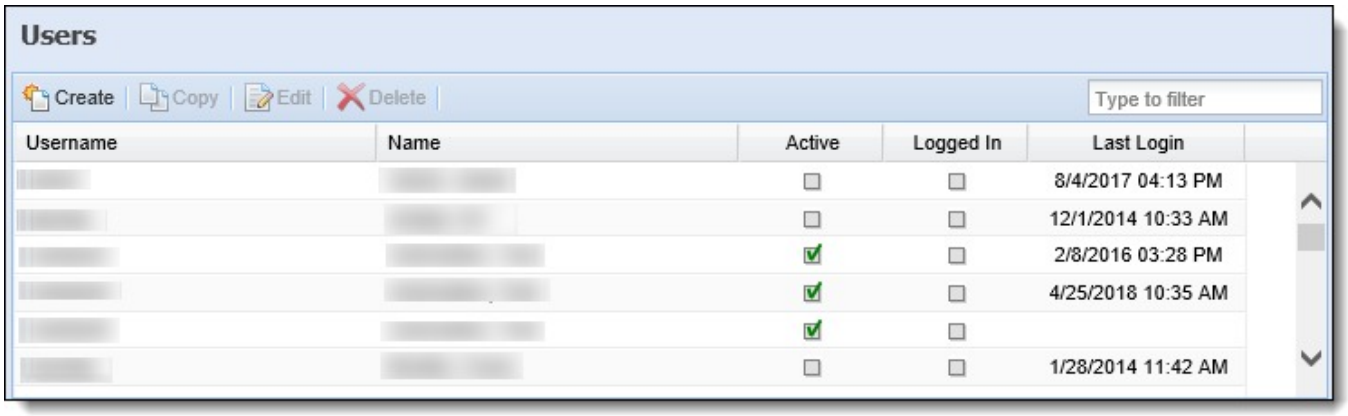
- To delete an export, highlight the desired export within the Exports grid and click Delete.
- A confirmation message appears. Click **Yes** to delete the export or **No** to retain the export and return to the Exports page.

Security and Permissions

Users

The System User functionality is used to create and maintain Temenos users for the organization. The Users page can be accessed from System Management > Users, and displays all users for the organization.

> The default view of this page is the All Users view, which lists all users in alphabetical order by username.



The following columns display in the Users page:

Column Name	Description
Username	Displays the user name of the user.
Name	Displays the full name (Last, First) of the user.

Active	If checked, the user is active in Temenos Infinity.
Logged In	If checked, the user is currently logged into Temenos Infinity.
Last Login	Displays when the date and time of when the user was last logged in.

From the Users page, administrators can perform the following actions:

- Create new users.
- Copy existing users.
- Edit existing users.
- Unlock deactivated users.
- Delete users.

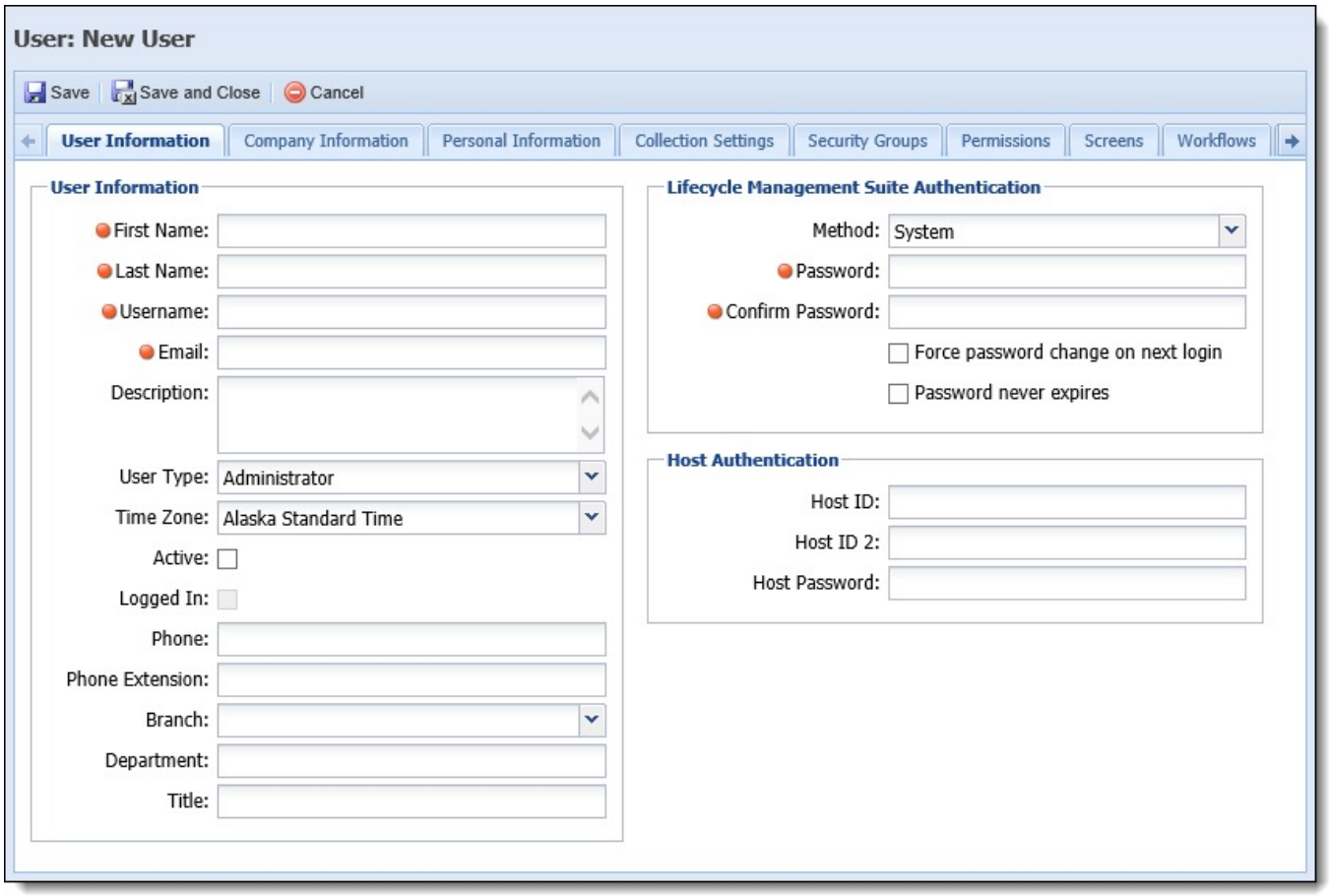
User Attributes

The following attributes are defined within the User Edit window when creating or editing a Temenos user:

- User Information
- Company Information
- Personal Information
- Collection Settings
- Security Groups
- Permissions
- Screens
- Workflows
- Dashboards
- Views
- Reports
- Areas
- Categories
- Credentials
- Restrictions
- Notification Groups
- Assignment Groups
- Scheduling
- Lending Settings

User Information

The User Information tab provides system administrators with the ability to define specific information for the user, such as the username and authentication credentials.



This tab includes the following three sections:

- User Information
- Lifecycle Management Suite Authentication
- Host Authentication

User Information

The User Information section allows system administrators to enter basic information about the user.

> Certain fields within this section can be included within letter and email templates.

The following fields display within the User Information section:

Field Name	Description
First Name	Enter the first name of the user. This is a required field.
Last Name	Enter the last name of the user. This is a required field.
Username	Define a username for the user. This is used to log into Temenos Infinity, if not using Windows Authentication. This is a required field.
Email	Enter in the user's email address. This is a required field.
Description	If necessary, enter in a description for the user.

User Type	Define the role of the user within Temenos Infinity from this drop-down. This correlates to the workflow history colors under System Management > Administrative Settings. The security for the user is not determined by this drop-down.
Time Zone	Define the time zone for the user. This reflects the time that displays in a workflow history screen when an account is worked.
Active	Select this check box to activate the user. Leave the check box blank to deactivate a user.
Logged In	If checked, this box indicates whether the user is logged into Temenos Infinity. This field can be used as a reference when editing an existing user.
Phone	Enter in the phone number of the user.
Phone Extension	Enter in the phone extension of the user.
Branch	If there are multiple branches, select the branch where the user works. This is system-defined.
Department	Enter the name of the user's department.
Title	Enter the job title of the user.

Lifecycle Management Suite Authentication

While this topic has been updated to reflect the new Temenos Infinity branding, Lifecycle Management Suite will continue to appear for this section until such a time that the branding can be updated.

Within the Lifecycle Management Suite Authentication section, define the sign-in method of the new user.

By default, **System** is selected, which requires the user to enter in username and password to sign into Temenos Infinity. The administrator must define the password in this section.

The value of the password is masked upon entry in the Password and Confirm Password fields.

Once the user details are saved, the encrypted version of the password is populated within the Password field, masked as dots.

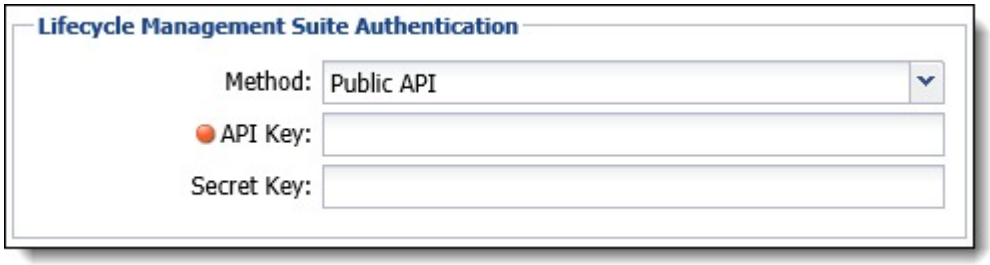
- Select the Force password on next login check box to prompt the user to change their password on their next login.
- Select the Password never expires check box to allow the password never to expire.

Select the **Windows** method to allow users to sign in using the

button on the sign-in page. If this option is selected, the system validates the Windows ID and password for the user during the log in process. Enter the Windows Account for the user in the Windows Account field. The format for the windows account is always DOMAIN NAME\username.

Select the **Public API** method to establish a dedicated user to communicate with connectors and third party integrations using the Public API DMZ service.

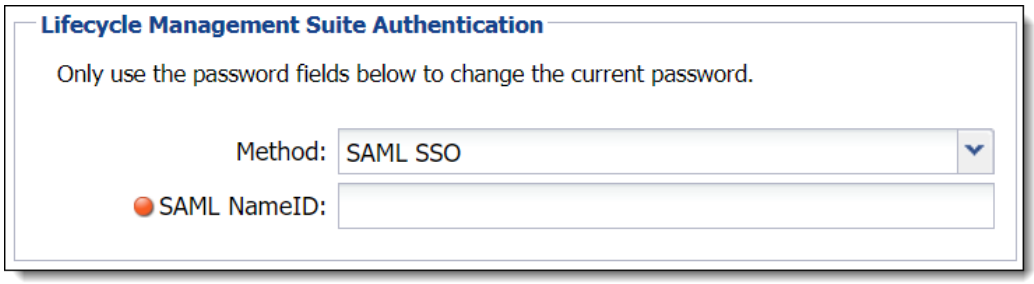
These settings are only used for certain connectors that utilize the Public API DMZ service.



Upon selecting this method, complete the following parameters:

Parameter	Description
API Key	Enter the API Key generated by Temenos. This field is required. When saving this screen, the API Key is decrypted and validated against the installation key for the environment to confirm that the key is valid. If the API Key does not match, an error message displays to the user.
Secret Key	Enter the Secret Key generated by the financial institution. This parameter provides an added level of security to financial institutions. When a value for the Secret Key exists in the database, it is not displayed within this page for security purposes. The Security Key value is stored one-way hashed in the database. The Secret Key can be modified once saved. If a user attempts to update this field to a blank value, the existing Secret Key is retained in the database.

Select the **SAML SSO** method to allow users to sign in using the Use Single Sign-On button on the sign-in page. If this option is selected, the system redirects to the configured SAML SSO provider's page to validate the credentials for the user during the log in process. Enter the NameID provided by the SAML SSO identity provider for the user in the SAML NameID field.



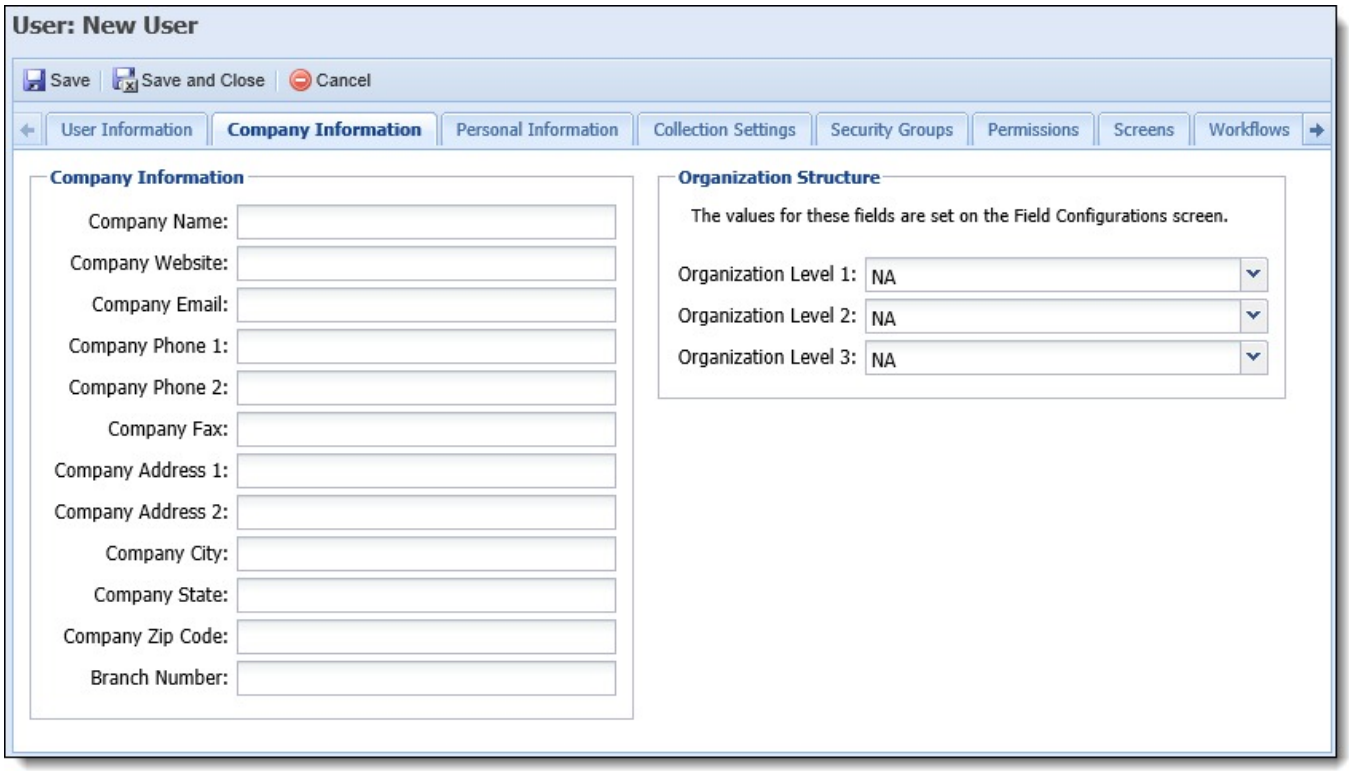
Host Authentication

Within the Host Authentication section, define the Host ID, Host ID 2, and Host Password for the host system.

> These settings are only used for certain host systems. For more information, please see the applicable core connector guide for the institution.

Company Information

The Company Information tab is comprised of two sections: Company Information and Organization Structure.



The Company Information section of the tab provides the ability to define the following information for the user:

The fields within the Company Information section are for informational purposes only.

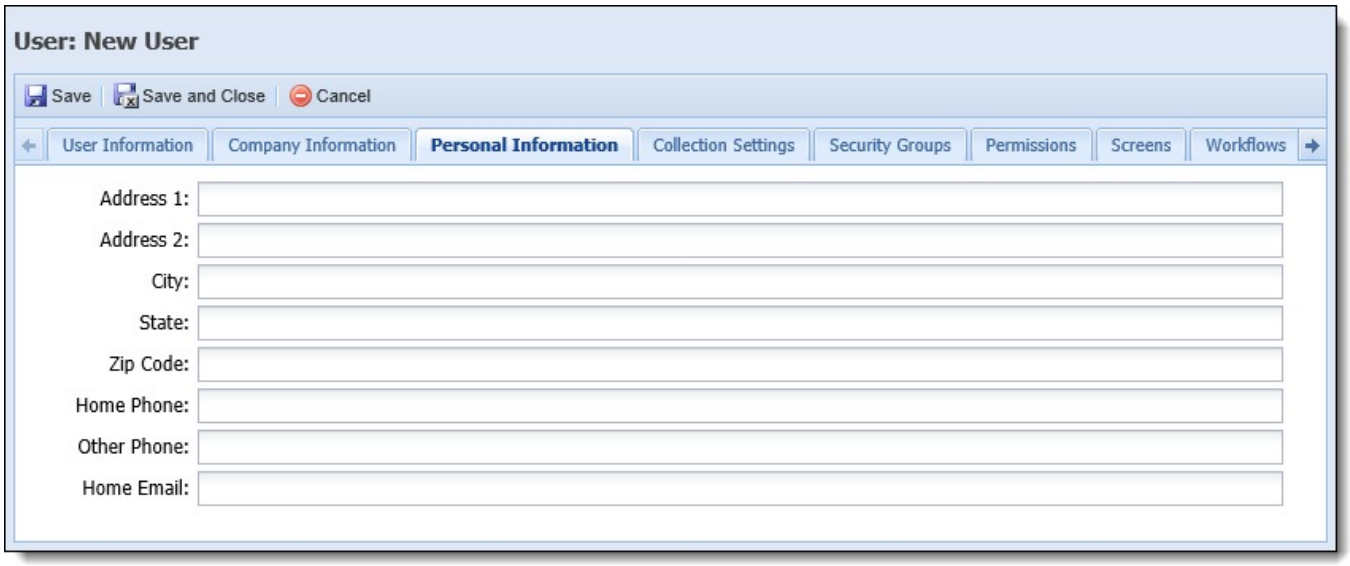
Field Name	Description
Company Name	Enter the name of the company.
Company Website	Enter the website URL for the company.
Company Email	Enter the email address for the company.
Company Phone 1	Enter in the primary phone number for the company.
Company Phone 2	Enter an additional phone number in which the company can be reached.
Company Fax	Enter in a fax number for the company.
Company Address 1	Enter the first line of the company address.
Company Address 2	Enter in the second line of the company address.
Company City	Enter the city in which the company is located.
Company State	Enter the state in which the company is located.
Company Zip Code	Enter the zip code in which the company is located.
Branch Number	Enter the branch number of the company.

Within the Organization Structure section, select a value from the desired Organization Level field(s) to define how the user is to be grouped for easier reporting purposes. The values in each drop-down populate from the ORG_LEVEL1, ORG_LEVEL2, or ORG_LEVEL3 lookup fields in System Management > Field Configurations.

Personal Information

The Personal Information tab provides system administrators with the ability to define the user's personal information.

The fields within the Personal Information section are for informational purposes only.

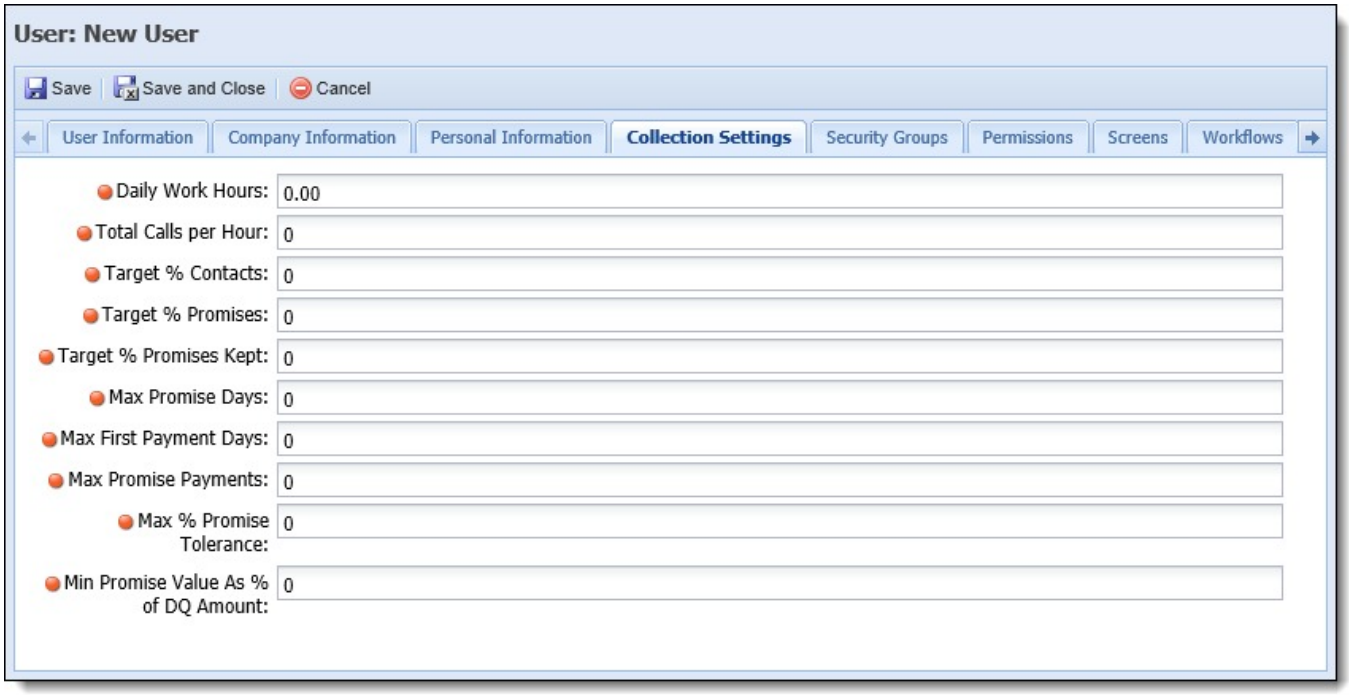


The following fields display in this tab:

Field Name	Description
Address 1	Enter the first line of the user's home address.
Address 2	Enter the second line of the user's home address.
City	Enter the city in which the user resides.
State	Enter the state in which the user resides.
Zip Code	Enter the Zip Code in which the user resides.
Home Phone	Enter the home phone number of the user.
Other Phone	Enter an additional phone number of the user.
Home Email	Enter in the personal email address of the user.

Collection Settings

The Collections Settings tab provides the ability to set collection standards for the user. These fields are used by administrators to track collection performance.



The following fields display within this tab:

Field Name	Description	How contributes to User Performance
Daily Work Hours	Identifies the number of hours per a day that the user is expected to work.	N/A

Total Calls per Hour	Identifies the number of calls that a collector is expected to make per hour.	Used to determine: • Target Number of Calls for Collector Production Dashboard and User Performance Dashboard. (Total Calls Per Hour x Hours Worked= Target Number of Calls)
Target % Contacts	Identifies the percentage of calls placed by the user expected to result in a successful, valid contact.	Used to determine: • Target Number of Contacts for Collector Production Dashboard and User Performance Dashboard. (Actual Calls x Target % Contacts= Target Number of Contacts)

Target % Promises	Define the percentage of successful promises the user must meet.	Used to determine: • Promises Made Target for Collector Production Dashboard ((Target % Promises x Contact Count)/100= Promises Made Target) • Target Number of Promises for User Performance Dashboard. (Number of Contacts x Target % Promises= Target Number of Promises)
Target % Promises Kept	Define the percentage of successful promises kept the user must meet.	Used to determine: • Target Number of Promises Kept for Promise Monitor Dashboard. ((Target % Promises Kept x Due Count)/100= Target Number of Promises Kept)

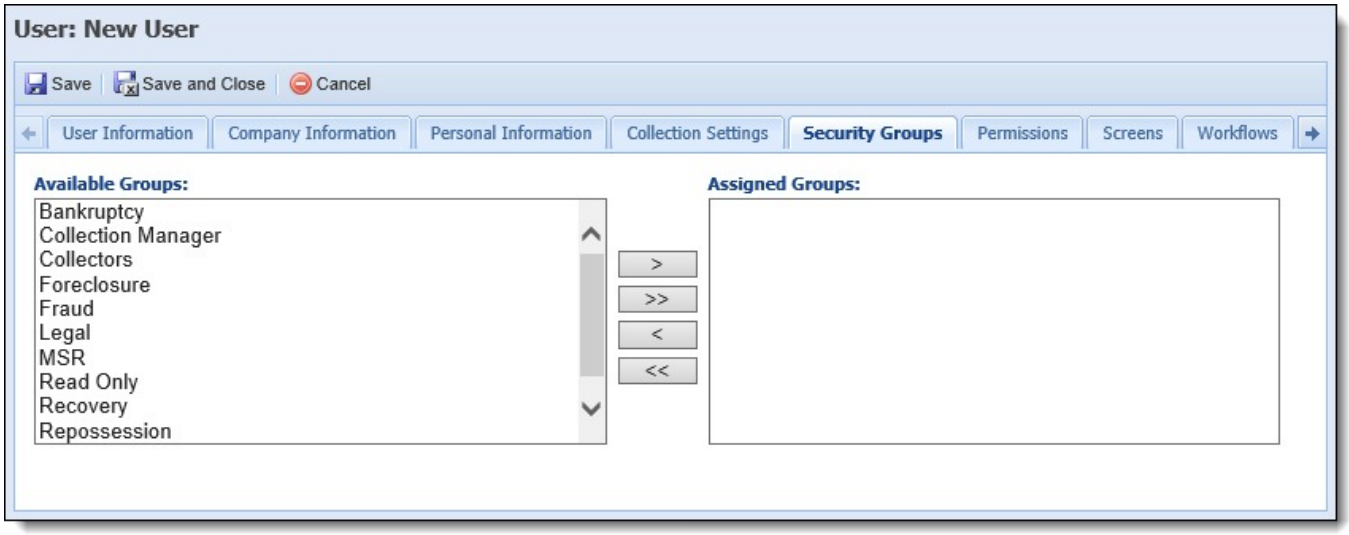
Max Promise Days	Identifies the maximum number of days a collector can define for the time period in which the total promise must be fulfilled. For example, if the max promise days is set to 30 days and the user sets the promise to be completed in 45 days, the promise goes to management for approval.	N/A
Max First Payment Days	Identifies the maximum number of days in advance that a collector can schedule the first promise payment. For example, if the max first payment days is set to 10 days and the user schedules the first payment in 20 days, the promise goes to management for approval.	N/A
Max promise payments	Identifies the maximum number of payments in which a user is able to divide a promise payment. When an end-user is running the Promise to Pay workflow step, this determines the maximum amount of promise payments the user can select from the Number of Payments drop-down. For example, if the max promise days in System Management > Modules > Collection is equal to 4, and the user sets up 5 payments, the promise is deferred to management approval.	N/A
Max % Promise Tolerance	Identifies the maximum percentage of the total promise amount that a user can accept to satisfy the promise payment. A promise payment can be short without being considered broken as long as the payment meets the discount requirement specified here. For example, if the max % promise is 10% and the total promise amount is $1,000, the promise payment can be satisfied if the borrower pays $900. If no discounting is permitted, then the value in this field should be set to "0."	N/A
Min Promise Value As % of DQ Amount	Identifies the minimum % of the total promise amount that the user is allowed to accept. For example, if this setting is set to 10% and the total DQ amount is $10,000.00, the minimum promise that the user can take is $1,000.00. Otherwise the promise is sent for manager approval.	N/A

For additional information on User Performance, please see the User Performance Web Part topic in the User Guide.

Security Groups

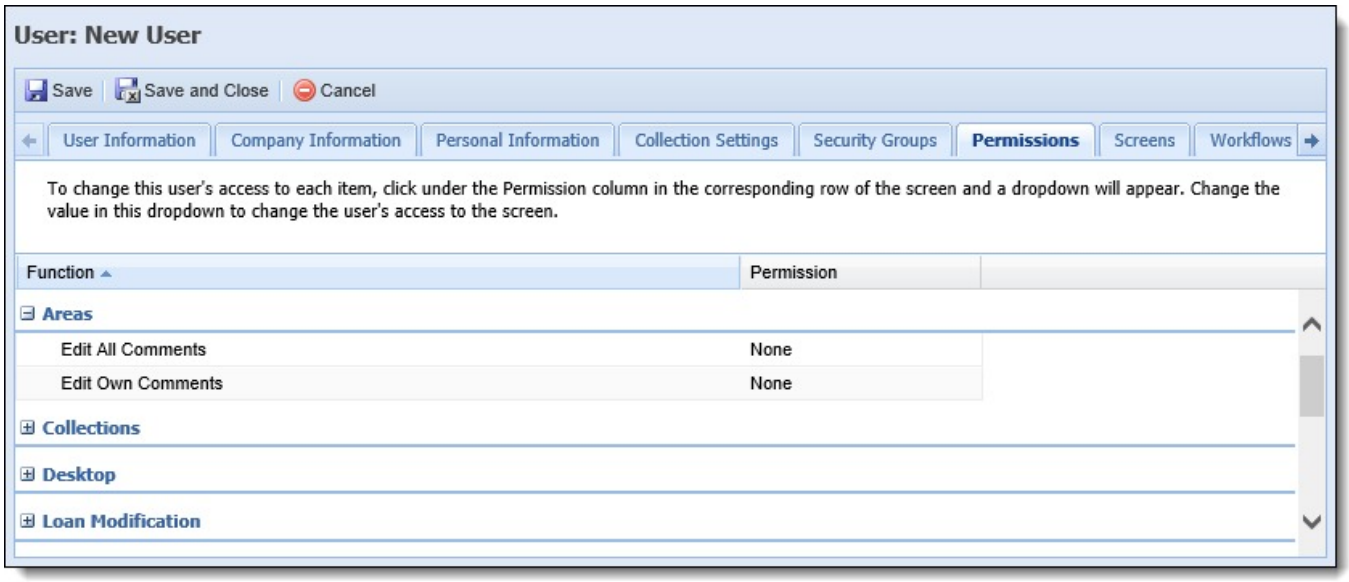
Within the Security Groups tab, assign the user to a Security Group. The Security Groups available to assign are defined in System Management > Groups > Security Groups.

> A user can be assigned to multiple security groups.



Permissions

The Permissions tab enables system administrators to manage a user's access to several features throughout the system.



This tab contains two columns: Function and Permission. Click under the Permission column in the corresponding row, and a drop-down appears. Change the value in this drop-down to modify the user's access to the functionality.

The following permission options are available for each user:

- **None:** If selected the user does not have permission to view or execute the feature.

- **Change:** If selected the user has full access to the feature. User can view and edit.
- **View:** If selected, the user has the ability to view the function but does not have the ability to change or execute it.

Reference the following section for an overview of each permission table:

Permission Tables

The tables below provide a list of the permissions available under each category, as well as a description of each permission.

Application Processing - Loan	
Name of Permission	**Description**
Add and Delete Fees on Application: Allows a user to add and remove fees that have been automatically or manually added to a loan application.	**None** = Add and Delete buttons are disabled in the Fees panel. Edit is disabled for the Fees grid. **Change** = Add and Delete buttons are enabled in the Fees panel. Edit is enabled for the Fees grid.
Approve Loan: Allows a user to manually approve an application.	**None** = "Approve" button is disabled in the Workflow and Application Toolbar. **Change** = "Approve" button is enabled in the Workflow and Application Toolbar if Status <> Incomplete, Disbursed or Not Eligible.
Change Applicants Receiving Adverse Action Notice: Allows user to change the field to send an adverse action notice to a particular applicant from the Reject Application & Withdraw Application windows.	**None** = applicant check boxes are disabled on Reject Application and Withdraw Application windows. **Change** = applicant check boxes are enabled on Reject Application and Withdraw Application windows.
Change Effective Date on Application: Allows a user to update the Effective Date field on the application screen that collects loan term information.	**None** = user does not have permission to override and is presented with an override pop-up window if the field has been modified. **Change** = user has permission to override and is not presented with override pop-up if the field has been modified. Also allows user to input credentials into the override pop-up for other users.

Change Fees from Sub-Product: Allows a user to modify the amount of a fee automatically added to a loan application by the system.	**None** = User does not have permission to override the amount for a loan fee, and is presented with an override pop-up window when a Fee field is modified. **Change** = User has permission to override the fee amount for a loan fee, and is not presented with the override pop-up when an Fee field is modified. This permission also allows a user to input credentials into the override pop-up for other users.
Change Introductory Term on Application: Allows a user to manually change the introductory term that is used for Introductory Rate calculations.	**None** = Introductory Term field is disabled on the Loan Terms screen. **Change** = Introductory Term field is enabled on the Loan Terms field
Change Variable Rates: Allows a user to change the Variable Rate fields (listed below) on the Loan Terms screen. • First Rate Change Date • Rate Change Frequency • Rate Change Margin • Max Rate Decrease for Loan • Max Rate Increase for Loan • Max Rate Decrease per Change • Max Rate Increase per Change	**None** = user does not have permission to edit fields. If fields have been changed by the user they are presented with an override pop-up window. **Change** = user has permission to edit fields and is not presented with override pop-up. Also allows user to input credentials into the override pop-up for other users.
Change Vendor on Application: Allows a user to change the Vendor/Dealer field during the application process.	**None** = Vendor field is disabled in the Properties pop-up box when Dealer Purchase or Indirect are selected as Source. **Change** = Vendor field is enabled in the Properties pop-up box when Dealer Purchase or Indirect are selected as Source.

Cross-sells In Loan Amount Exceed Approval Tolerance: Allows a user to override the Approval Tolerance Amount that is set on the sub-product definition (only if it is exceeded because of cross-sells being included in the loan amount, such as GAP & MBC).	**None** = user does not have permission to override and is presented with an override pop-up window. **Change** = user has permission to override and is not presented with override pop-up. Also allows user to input credentials into the override pop-up for other users.
Decline Loan: Allows a user to decline a loan application.	**None** = "Decline" button is disabled in the Application Toolbar and Workflow. **Change** = "Decline" button is enabled in the Application Toolbar and Workflow if Status <> Incomplete, Disbursed, or Not Eligible.
Disburse Loan: Allows a user to Disburse and book the loan to the core system.	**None** = The Disburse button is not able to be selected in the Application Toolbar and Workflow. **Change** = The Disburse button able to be selected in the Application Toolbar and Workflow.
Edit Adverse Action Reasons: Allows a user to add Reject & Adverse Action Reasons to an application via the Other Actions button.	**None** = "Collect Adverse Actions" is disabled in the Other Actions dropdown. **Change** = "Collect Adverse Actions" value in the Other Actions dropdown list is active and can be selected.
Edit Disbursement Date: Allows a user to edit the Disbursement Date field.	**None** = Disbursement Date is disabled on the application screen that collects loan term information. **Change** = Disbursement Date field is enabled on the application screen that collects loan term information.
Edit Doc Stamps Program: Allows a user to edit fields in the application related to the Doc Stamps Program.	**None** = User does not have permission to edit fields. **Change** = User has permission to edit fields.

Edit First Notification, Second Notification and Expiration Dates: Allows a user to edit these fields on the Loan Terms screen.	**None** = User does not have permission to edit fields. **Change** = User has permission to edit fields.
Exclude Payee from OFAC: Allows a user to exclude a check payee from being checked via the OFAC interface during the Disbursement.	**None** = "Do Not Run OFAC" Checkbox is disabled on Edit Payee OFAC Information window. **Change** = "Do Not Run OFAC" Checkbox is enabled on Edit Payee OFAC Information window.
Fund Delay Reasons - Add: Allows a user to add a Fund Delay Reason and Delay Extensions to the application.	**None** = Add button is disabled in the Fund Delay panel and Create & Edit Delay screen **Change** = Add Button is enabled in the Fund Delay panel and Create & Edit Delay screen.
Fund Delay Reasons - Delete: Allows a user to remove a Fund Delay Reason or Delay Extension on the application.	**None** = Delete button is disabled in the Fund Delay panel and Create & Edit Delay screen. **Change** = Delete button is enabled in the Fund Delay panel and Create & Edit Delay screen.
Fund Delay Reasons - Edit: Allows a user to modify a Fund Delay Reason and Delay Extension on the Application.	**None** = Edit button is disabled in the Fund Delay panel and Create & Edit Delay screen. **Change** = Edit is enabled in the Fund Delay panel and Create & Edit Delay screen.
Fund Delay Reasons - Waive: Allows a user to mark a delay as being waived in the Fund Delay.	**None** = Waive checkbox is disabled in the Fund Delay panel and Create & Edit Delay screen. **Change** = Waive checkbox is enabled in the Fund Delay and Create & Edit Delay screen.

Initial Amount Exceeds Min/Max for Sub-Product: Allows a user to override the Min/Max Amount values that are set at the sub-product definition. For example: New Auto has a min amount of $1500.00. An application is being submitted and the Requested Amount is $1000.00. An override box pops-up for users who do not have this permission and requires someone with this authority to put in their credentials in order for the user to proceed with the application.	**None** = user does not have permission to override and is presented with an override pop-up window. **Change** = user has permission to override and is not presented with override pop-up. Also allows user to input credentials into the override pop-up for other users.
LO Approval – Display Adverse Actions: Allows user to view/edit the Adverse Action panel on the Approve Application screen.	**None** = Adverse Action sub-panel is not displayed on the Approve Application screen. **Change** = Adverse Action sub-panel is displayed and editable on the Approve Application screen.
Loan Covenants – Add: Allows a user to add loan covenants to a loan application.	**None** = Add button is disabled in the Loan Covenants panel. **Change** = Add button is enabled in the Loan Covenants panel. If a user is granted permission to add loan covenants, the Loan Covenants - Change permission should also be set to Change for the user to ensure he or she is able to set values for the convenant once it is added.
Loan Covenants – Change: Allows a user to modify a loan covenant on a loan application.	**None** = The Edit button is disabled in the Loan Covenants panel, and the fields that support inline editability are read-only in the panel grid. **Change** = The Edit button is enabled in the Loan Covenants panel, and inline editing is available for the applicable fields in the panel grid.

Loan Covenants – Allow Delete: Allows a user to remove loan covenants that have been automatically or manually added to the application.	**None** = The Delete button is disabled in the Loan Covenants panel. **Change** = The Delete button is enabled in the Loan Covenants panel.
Loan Covenants - Waive on Application: Allows a user to mark a loan covenant as waived on a loan application.	**None =** Waive check box is disabled when editing a loan covenant in the Loan Covenants panel. **Change** = Waive check box is enabled when loan covenant in the Loan Covenants panel.
Loan Cross-sells Exceed Max Amount: Allows a user to override the Max Loan Cross-Sell Amount (the sum of all an application's new/replacement Cross-sell offers) that can be set by an underwriter on the manual underwriting screen. For example: An underwriter has set the Max Loan Cross-Sell amount to be $10,000.00 on the underwriting screen. The end user gets to the Cross-Sell screen and pitches the Cross-sell products. The applicant wants all the available cross-sell offers, which total $15,000.00. An override box appears for users who do not have this permission and requires someone with this authority to put in their credentials in order for the user to proceed with the application.	**None** = user does not have permission to override and is presented with an override pop-up window. **Change** = user has permission to override and is not presented with override pop-up. Also allows user to input credentials into the override pop-up for other users.
LTV Exceeds Min/Max for Sub-Product: Allows a user to override the Min/Max LTV value that is set at the sub-product definition. For example: New Auto has a max LTV of 110%. An application is being processed and the LTV is calculated to be 112%. An override box pops-up for users who do not have this permission and requires someone with this authority to put in their credentials in order for the user to proceed with the application.	**None** = user does not have permission to override and is presented with an override pop-up window. **Change** = user has permission to override and is not presented with override pop-up. Also allows user to input credentials into the override pop-up for other users.
Recurring Fees - Add and Delete: Allows a user to add recurring fess to a loan application, as well as remove recurring fees that have been automatically or manually added to the application.	**None** = Add and Delete buttons are disabled in the Recurring Fees panel. **Change** = Add and Delete buttons are enabled in the Recurring Fees panel.

Recurring Fees - Change Recurring Fees: Allows a user to modify a recurring fee on a loan application.	**None** = Fields are read-only in the Recurring Fees panel, and cannot be modified. **Change** = Inline editing is available in the Recurring Fees panel, and users are able to modify field values within the grid.
Recurring Fees - Waive on Application: Allows a user to mark a recurring fee as waived on a loan application.	**None =** Waive check box is disabled when editing a fee in the Recurring Fees panel. **Change** = Waive check box is enabled when editing a fee in the Recurring Fees panel.
Unmask Lending Fields TIN and DOB: Allows a user to view unmasked values for the TIN and Date of Birth fields in an application.	**None =** User is unable to view an unmasked value of the TIN and Date of Birth fields in an application. When the user hovers over the icon for the TIN or Date of Birth field, a tool-tip is presented to the user to identify that permission to unmask the field is not enabled. If this permission is set to None, but the View Masked Fields permission is set to View, the user is able to view an unmasked value for TIN and Date of Birth fields when the icon is clicked. A user can only search using a full 9-digit TIN (see formatting below) or a 4-digit partial TIN. **View =** User is able to view the full unmasked value of the TIN and Date of Birth fields in an application. User can search using a partial (any length) TIN or full 9-digit TIN (formatted as either 999-99-9999 or 99-999999).

Waive Loan Review Indicator: Allows a user to mark a loan review indicator account as waived.	**None** = The waived flag remains read-only on the Loan Review Indicator panel. **Change** = The waived flag can be set to True for a given account on the Loan Review Indicator panel.

System Management	
Name of Permission	**Description**
Account Assignments: Allows a user to manually assign or unassign accounts to a Collection Queue.	**None =** Users can not view or access the Account Assignments page in System Management. **View =** Allows users to view but not make any changes to the Account Assignments page in System Management. **Change =** Allows users to view and make changes within the Account Assignments page in System Management.
Account Types: Allows a user to view and change Account Types for collections. These Account Types can be mapped to various accounts within Temenos Infinity.	**None =** Users can not view or access the Account Types page in System Management. **View =** Allows users to view but not make any changes to the Account Types page in System Management. **Change =** Allows users to view and make changes within the Account Types page in System Management.

Administrative Settings: Allows a user to view and change administrative settings within Temenos Infinity. Administrative Settings can be accessed in System Management and include settings such as look and feel, security and institutional information.	**None** = Users can not view or access the Administrative Settings page in System Management. **View** = Allows users to view but not make any changes to the Administrative Settings page in System Management. **Change** = Allows users to view and make changes within the Administrative Settings page in System Management.
Alerts: Allows a user to view and edit system-wide alerts that appear each time a user logs into the system.	**None** = Users can not view or access the Alerts page in System Management. **View** = Allows users to view but not make any changes to the Alerts page in System Management. **Change** = Allows users to view and make changes within the Alerts page in System Management.
Archive Data: Allows a user to archive data, such as accounts, within Temenos Infinity. Archiving data cannot be undone. Therefore, users should be cautious with using this functionality.	**None** = Users can not view or access the Archive Data page in System Management. **Change** = Users can view and access the Archive Data page, as well as perform the Archive function.
Areas: Allows a user to access and change Areas from System Management. Areas allow users to configure the look and feel and functionality of a workspace.	**None** = Users can not view or access the Areas page in System Management. **View** = Allows users to view but not make any changes to the Areas page in System Management. **Change** = Allows users to view and make changes within the Areas page in System Management.

Automated Workflow: Allows a user to view and create automated workflows within Temenos Infinity.	**None** = Users can not view or access the Automated Workflow page in System Management > Workflow > Automated Workflow. **View** = Allows users to view but not make any changes or execute Automated Workflows within the Automated Workflow page in System Management > Workflow > Automated Workflow. **Change** = Allows users to view and make changes within the Areas page in System Management.
Batch Case Processing: Allows a user to view and perform Batch Case Processing within Temenos Infinity.	**None** = Users can not view, access, or perform the Batch Case Processing function within System Management > Batch Case Processing. **Change** = Allows users to view, access, and perform the Batch Case processing function within System Management > Batch Case Processing.
Batch Letter Printing: Allows a user to view and perform Batch Letter Printing for a previously created batch.	**None** = Users can not view, access, or perform the Batch Letter Printing function within System Management > Communication > Batch Letter Printing. **Change** = Allows users to view, access, and perform the Batch Letter Printing function within System Management > Communication > Batch Letter Printing.

Batch Workflow: Allows a user to create and execute batch workflows within Temenos Infinity.	**None** = Users can not view, access, or perform the Batch Workflow function within System Management > Workflow > Batch Workflow. **View** = Allows user to view and access the Batch Workflow page but not execute a Batch Workflow in System Management > Workflow > Batch Workflow. **Change** = Allows users to view, access, and execute Batch Workflows within System Management > Workflow > Batch Workflow.
Branches: Allows a user to create and maintain branches in Temenos Infinity.	**None** = Users cannot view or access the Branches page in System Management. **View** = Allows users to view but not make any changes to the Branches page in System Management. **Change** = Allows users to view and make changes within the Branches page in System Management.
Categories: Categories are no longer used in v14.	**None** = Users can not view or access the Categories page in System Management. **View** = Allows users to view but not make any changes to the Categories page in System Management. **Change** = Allows users to view and make changes within the Categories page in System Management.

Companies and Contacts: Allows a user to view, edit and change companies and contacts within the Address Book. These companies and contacts can be accessed throughout Temenos Infinity.	**None** = Users can not view or access the Companies and Contacts pages in System Management > Address Book. **View** = Allows users to view but not make any changes to the Companies and Contacts pages in System Management > Address Book. **Change** = Allows users to view and make changes within the Companies and Contacts pages in System Management > Address Book.
Configuration Export: Allows a user to view, edit and change Configuration Manager Exports.	**None** = Users can not view or access the Export Configurations page in System Management > Configurations. **View** = Users can view the Export Configurations in System Management. **Change** = Allows users to view and make changes within the Export Configurations page in System Management > Configurations.
Configuration Import: Allows a user to view, edit and change Configuration Manager Imports.	**None** = Users can not view or access the Import Configurations page in System Management > Configurations. **View** = Users can view the Import Configurations in System Management. **Change** = Allows users to view and make changes within the Import Configurations page in System Management > Configurations.

Connectors: Allows a user to access connectors that the institution utilizes within System Management.	**None** = Users do not have access to the Connectors folder in System Management. **View** = Allows users to access the connector pages but not save any changes within the page. **Change** = Allows users to have access to all Connectors in the Connectors folder in System Management.
Cost Centers (Recovery Module): Allows a user to view and change costs centers within the system.	**None** = Users can not view or access the Cost Centers page in System Management. **View** = Allows users to view but not make any changes to the Cost Centers page in System Management. **Change** = Allows users to view and make changes within the Cost Centers page in System Management.
Custom Field Management: Allows a user to create custom fields that are used to extend the Temenos Infinity database. Custom fields can be used throughout the entire system.	**None** = Users can not view or access the Custom Fields page in System Management. **View** = Allows users to view but not make any changes to the Custom Fields page in System Management. **Change** = Allows users to view and make changes within the Custom Fields page in System Management.

Data Purging Allows a user to view and change the data purge settings for Temenos database tables.	**None** = Users can not view or access the Data Purging page in System Management > Data Purging. **View** = Allows users to view, but not make any changes to the Data Purging page in System Management > Data Purging. **Change** = Allows users to view and make changes within the Data Purging page in System Management > Data Purging.
Dialer Return Codes: Allows a user to view and change dialers used when the system performs actions based off the code. When an institution is using a dialer, the dialer returns a code to the system after each call.	**None** = Users can not view or access the Dialer Return Codes page in System Management > Dialers > Dialer Return codes. **View** = Allows users to view but not make any changes to the Dialer Return Codes page in System Management > Dialers > Dialer Return Codes. **Change** = Allows users to view and make changes within the Dialer Return Codes page in System Management > Dialers > Dialer Return Codes.
Emails: Allows a user to view and create email templates to be used while working a case.	**None** = Users can not view or access the Emails page in System Management > Communication > Emails. **View** = Allows users to view but not make any changes to the Emails page in System Management > Communication > Emails. **Change** = Allows users to view and make changes within the Emails page in System Management > Communication > Emails.

Exports: Allows a user to view and change export settings within System Management.	**None** = Users cannot view or access the Exports page in System Management. **View** = Allows users to view but not make any changes to the Exports page in System Management. **Change** = Allows users to view and make changes within the Exports page in System Management.
Field Configurations: Allows a user to view and change field configurations within Temenos Infinity . Changes made in field configurations apply throughout the entire system.	**None** = Users cannot view or access the Field Configurations page in System Management.. **View** = Allows users to view but not make any changes to the Field Configurations page in System Management. **Change** = Allows users to view and make changes within the Field Configurations page in System Management.
Field List Configurations: Allows a user to map values from the BANKRUPTCY_PARTY_TYPE and PARTY_TYPE lookups to up to 10 flattened Bankruptcy Party or Legal Party fields, in order to populate the data in letters, views, and/or reports.	**None** = Users cannot view or access the Field List Configurations page in System Management.. **View** = Allows users to view the Field List Configurations page in System Management, but not make any changes. **Change** = Allows users to view and make changes within the Field List Configurations page in System Management.
Genesys: Allows a user to access the Genesys application, if available for the institution. Genesys provides dialer services.	**None** = Users can not access the Genesys page. **Change** = Allows users to have access to the Genesys application.

GL Accounts (Recovery Module): Allows a user to view and change GL Accounts when using the Recovery Module. GL Accounts are used when defining the posting rules on a transaction code to determine how a new transaction is allocated on a recovery account.	**None** = Users can not view or access the GL Accounts page in System Management. **View** = Allows users to view but not make any changes to the GL Accounts page in System Management. **Change** = Allows users to view and make changes within the GL Accounts page in System Management.
Hyperlinks: Allows a user to view and change Hyperlinks in System Management. Hyperlinks can be used when working a case.	**None** = Users can not view or access the Hyperlinks page in System Management. **View** = Allows users to view but not make any changes to the Hyperlinks page in System Management. **Change** = Allows users to view and make changes within the Hyperlinks page in System Management.
Interest Rates: Allows a user to view and change Interest Rates in System Management. Interest Rates are used to determine variable rates on charged off accounts. Charged-off accounts are available in the system, but this feature only ties to those accounts if the Recovery module is active.	**None** = Users can not view or access the Interest Rates page in System Management. **View** = Allows users to view but not make any changes to the Interest Rates page in System Management. **Change** = Allows users to view and make changes within the Interest Rates page in System Management.

Letter Barcode Activation: Allows a user to activate the letter barcode process and define the location where scanned files are to be placed for the institution.	**None** = Users can not view or access the Letter Barcode Activation page in System Management > Communication > Letter Barcode Activation. **View** = Allows users to view, but not make any changes to the Letter Barcode Activation page in System. **Change** = Allows users to view and make changes within the Letter Barcode Activation page in System Management.
Letter Barcode Scanning Exceptions: Allows a user to view exception documents, as well as manually attach the documents to the applicable account or cases.	**None** = Users can not view or access the Letter Barcode Scanning Exceptions page in System Management > Communication > Letter Barcode Scanning Exceptions. **View** = Allows users to view, but not make any changes to the Letter Barcode Scanning Exceptions page in System. **Change** = Allows users to view and make changes within the Letter Barcode Scanning Exceptions page in System Management.
Letters and Forms: Allows a user to create letters and other forms to be used when working a case within the system.	**None** = Users can not view or access the Letters and Forms page in System Management > Communication > Letters and Forms. **View** = Allows users to view but not make any changes to the Letters and Forms page in System Management > Communication > Letters and Forms. **Change** = Allows users to view and make changes within the Letters and Forms page in System Management > Communication > Letters and Forms.

Merge Accounts: Allows a user to merge two accounts together. This action cannot be undone, therefore, caution should be taken when using the merge function.	**None** = Users can not view or access the Merge Accounts page in System Management. **Change** = Users can view and access the Merge Accounts page, as well as perform the Merge function.
Payment Types: Allows a user to manage the values that appear within the Payment Method drop-down in the Promise to Pay Workflow Step.	**None** = Users can not view or access the Payment Types page in System Management > Payment Types. **View** = Allows users to view but not make any changes to the Payment Types page in System Management > Payment Types. **Change** = Allows users to view and make changes within the Payment Types page in System Management > Payment Types.
Performance Groups: Allows a user to view and change performance groups in System Management. The Performance Groups page allows administrators to group users together who have similar capabilities. Data regarding their calls, contacts and promises are calculated and tracked on an individual user basis and as a whole Performance Group.	**None** = Users can not view or access the Performance Groups page in System Management > Groups > Performance Groups. **View** = Allows users to view but not make any changes to the Performance Groups page in System Management > Groups > Performance Groups. **Change** = Allows users to view and make changes within the Performance Groups page in System Management > Groups > Performance Groups.

Process Scheduling	**None** = Users does not have access to view the new Processes System Management Screen. **View** = Users have access to view the new Processes System Management Screen but cannot make any changes. **Change** = Users have access to view and make changes within the new Processes System Management Screen.
Role Types: Allows a user to view and change Role Types in System Management.	**None =** Users can not view or access the Role Types page in System Management. **View =** Allows users to view but not make any changes to the Role Types page in System Management. **Change =** Allows users to view and make changes within the Role Types page in System Management.
Screens: Allows a user to view and change screens in System Management. There are three categories of screens within Temenos Infinity: System-Defined, Custom and User-Defined. System-Defined screens are pre-built by Temenos to provide out-of-the-box functionality and do not require (or allow) any configuration. Custom screens are coded by the customer or by Temenos on behalf of the customer and installed on the customer's site. A User-Defined screen is created by the customer within Screens.	**None =** Users can not view or access the Screens page in System Management. **View =** Allows users to view but not make any changes to the Screens page in System Management. **Change =** Allows users to view and make changes within the Screens page in System Management.

Security Groups: Allows a user to view and change Security Groups in System Management. Security Groups are designed so that managers can set access for a group rather than every individual Temenos user.	**None** = Users can not view or access the Security Groups page in System Management > Groups > Security Groups. **View** = Allows users to view but not make any changes to the Security Groups page in System Management > Groups > Security Groups. **Change** = Allows users to view and make changes within the Security Groups page in System Management > Groups > Security Groups.
Share Types: Allows a user to view and create various share types in System Management.	**None** = Users can not view or access the Share Types page in System Management. **View** = Allows users to view but not make any changes to the Share Types page in System Management. **Change** = Allows users to view and make changes within the Share Types page in System Management.
Third Party Duplicates: Allows a user to merge and export Third Party Duplicates in System Management. The Third Party Duplicates page displays any accounts imported from a third party that match multiple accounts with the same Third Party ID.	**None** = Users can not view or access the Third Party Duplicates page in System Management **View** = Allows users to view but not make any changes to the Third Party Duplicates page in System Management. **Change** = Allows users to view and make changes within the Third Party Duplicates page in System Management.

Third Party Exceptions: Allows a user to review and resolve third party exceptions so that all third party accounts can be imported into the system. Typical third party accounts include PSCU, FICS, Certegy,and more.	**None** = Users can not view or access the Third Party Exceptions page in System Management. **View** = Allows users to view and perform functions within the Third Party Duplicates page in System Management.
Third Party Field Audit: Allows a user to track account-level changes submitted by third party companies.	**None** = Users can not view or access the Third Party Field Audit page in System Management. **View** = Allows users to view but not make any changes to the Third Party Field Audit page in System Management. **Change** = Allows users to view and make changes within the Third Party Field Audit page in System Management.
Third Party Internal Transfer Request: Allows a user to view and edit third party transfer requests.	**None** = Users can not view or access the Third Party Transfer Request page in System Management. **View** = Allows users to view but not make any changes to the Third Party Transfer Request page in System Management. **Change** = Allows users to view and make changes within the Third Party Transfer Request page in System Management.
Tracing Web Pages Allows a user to access the tracing web pages.	**None** = User can not access the tracing web pages. **Change** = User can access the tracing web pages.

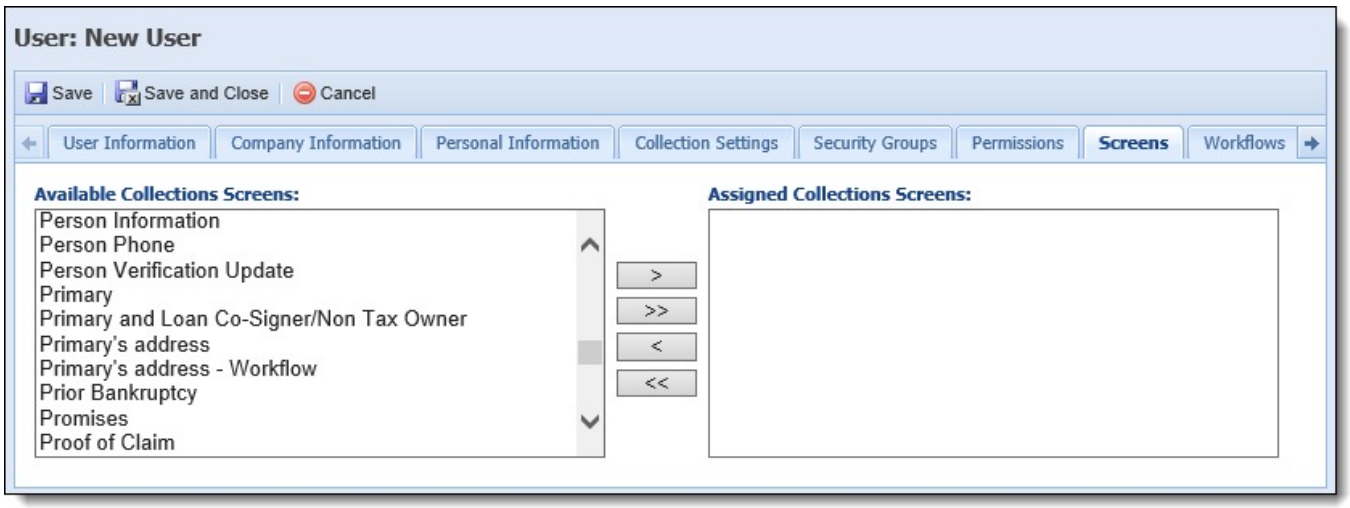
Transaction Codes (Recovery Module): Allows a user to track payments, adjustments, and expenses on charged off accounts. Multiple transaction codes can be configured to apply funds differently to an account.	**None** = Users can not view or access the Transaction Codes page in System Management. **View** = Allows users to view but not make any changes to the Transaction Codes page in System Management. **Change** = Allows users to view and make changes within the Transaction Codes page in System Management.
Users: Allows a user to view and change existing users within the system, as well as create new users.	**None** = Users can not view or access the Users page in System Management. **View** = Allows users to view but not make any changes to the Users page in System Management. **Change** = Allows users to view and make changes within the Users page in System Management.
Workday Schedules: Allows a user to define the expected duration when working an account, due dates, holidays and more.	**None** = Users can not view or access the Workday Schedules page in System Management. **View** = Allows users to view but not make any changes to the Workday Schedules page in System Management. **Change** = Allows users to view and make changes within the Workday Schedules page in System Management.
Workflow: Allows a user to view and change workflows in System Management. Workflows are used to document what occurs within an account or case and can be configured to be as basic or as complex as the creator desires.	**None** = Users can not view or access any features in the Workflow folder in System Management. **View** = Allows users to view but not make any changes to any of the features in the Workflow folder in System Management. **Change** = Allows users to view and make changes to any features in the Workflow Folder in System Management.

Screens

Within the Screens tab, assign available screens to the user. If a screen is assigned, the user has access to the screen in the person workspace.

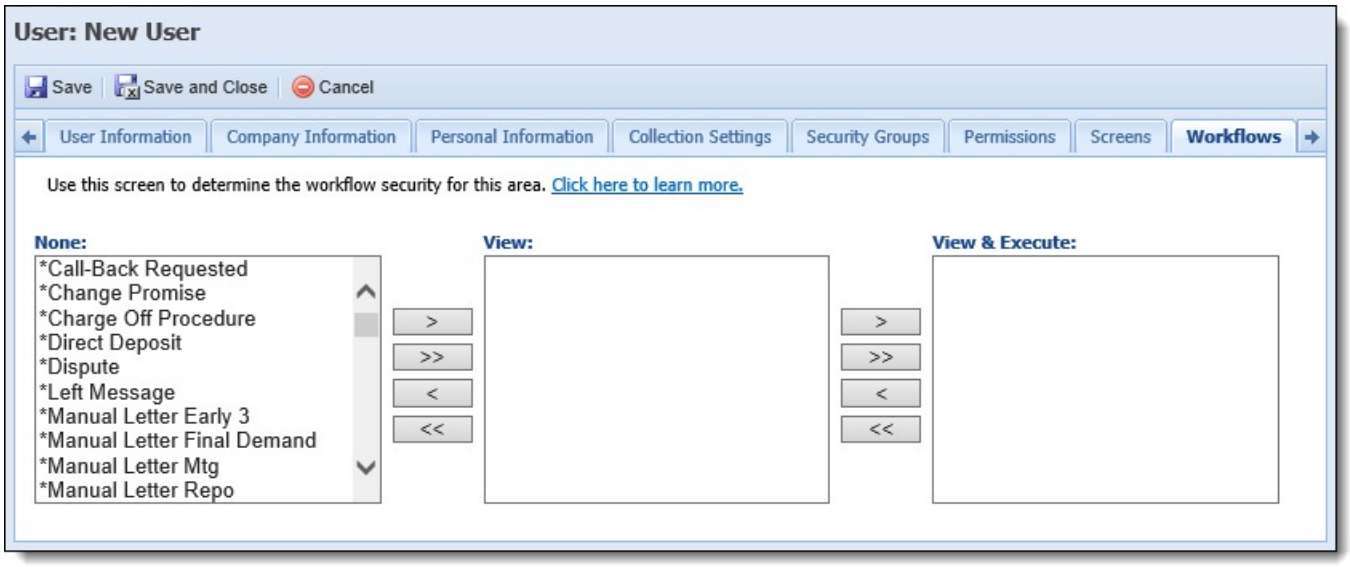
> The screens and boxes that display on the User Edit screen are determined by the enabled module(s). For example, if origination is not active, origination screens are not available to be assigned, and the Available and Assigned Origination Screens boxes do not display on the Screens tab. If the institution uses the Account Servicing modules, as well as the Origination modules, boxes display to assign both Collection screens and Origination screens to the user.

> If the security group the user is assigned to has access to the screen, by default the user has access to the screen even if they do not at the user level.



Workflows

In the Workflows tab, workflows can be assigned to “None,” “View,” or “View & Execute.”



If a workflow is assigned to None, the user is not able to view the workflow history associated to the workflow nor execute the workflow. If assigned to View, the user can view the workflow history associated to the workflow but cannot execute it. If assigned to View & Execute, the user can view the workflow history and execute the workflow on an account, case, or person.

> If the security group the user is assigned to has access to the workflow, the user has access to the workflow by default, even if he or she does not have access at the user level.

In order for a user to have access to a workflow on an Area, the following criteria must be met:

- The workflow must be assigned to the Area.
- The user must have direct security access to the workflow or access through a security group.

For each Workflow, security can be set on the Area and the User or Security Group level. This security only applies when a user enters the Workspace of an Area. For example, if a workflow is not assigned to an Area, the workflow does not appear in the Area regardless of the security applied to the workflow.

When assigning a workflow to an Area or assigning Users and Security Groups to a workflow, there are three levels of security:

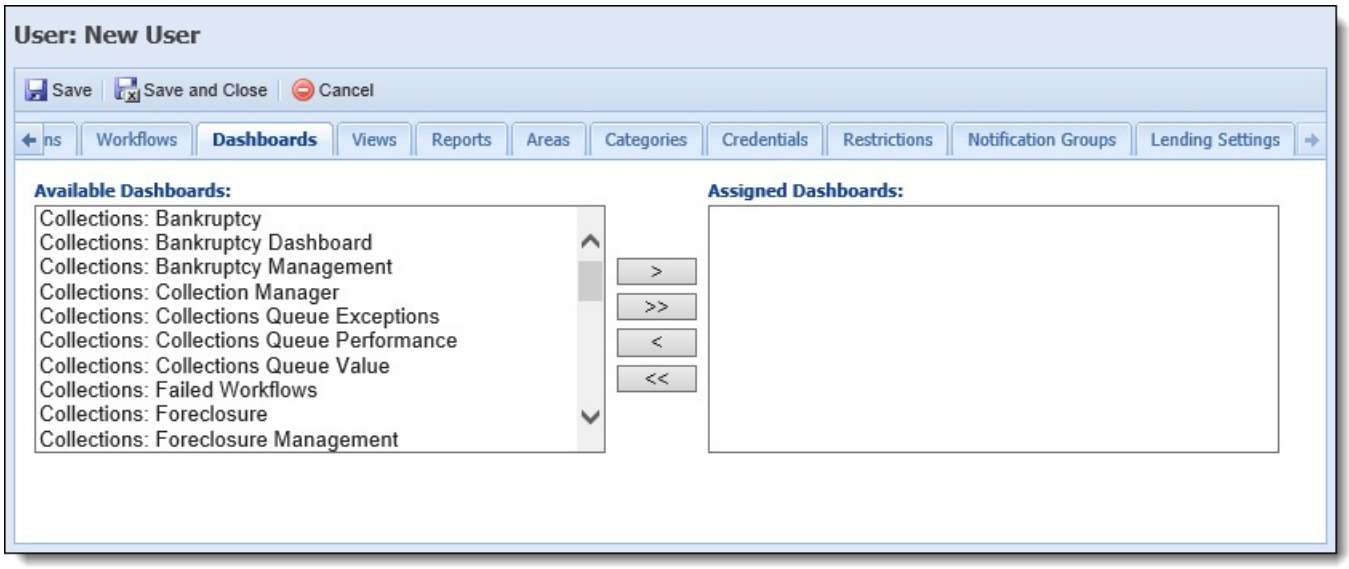
> None is the lowest level of security, and View & Execute is the highest level of security.

- None
- View
- View & Execute

Dashboards

In the Dashboards tab, assign available dashboards to the user. If assigned the user is able to open the dashboard from the dashboard icon in the Ribbon Bar.

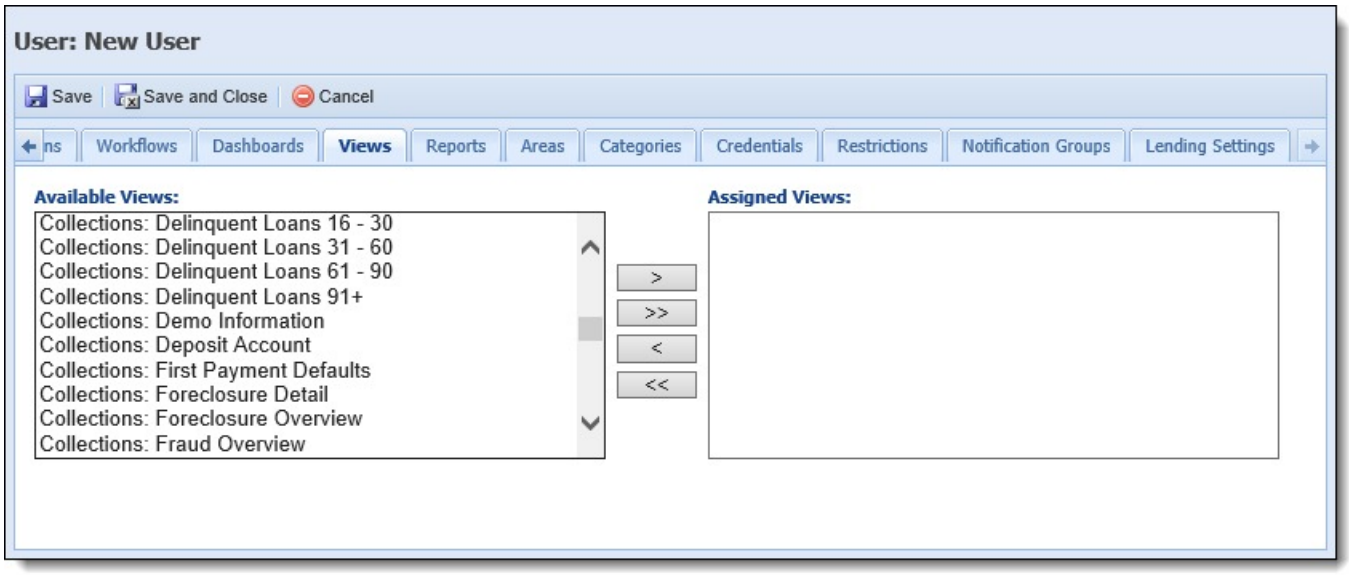
> If the security group the user is assigned to has access to the dashboard, by default the user has access to the dashboard even if they do not at the user level.



Views

In the Views tab, assign available views to the user. If assigned, the user is able to open the view from the views icon in the Ribbon Bar.

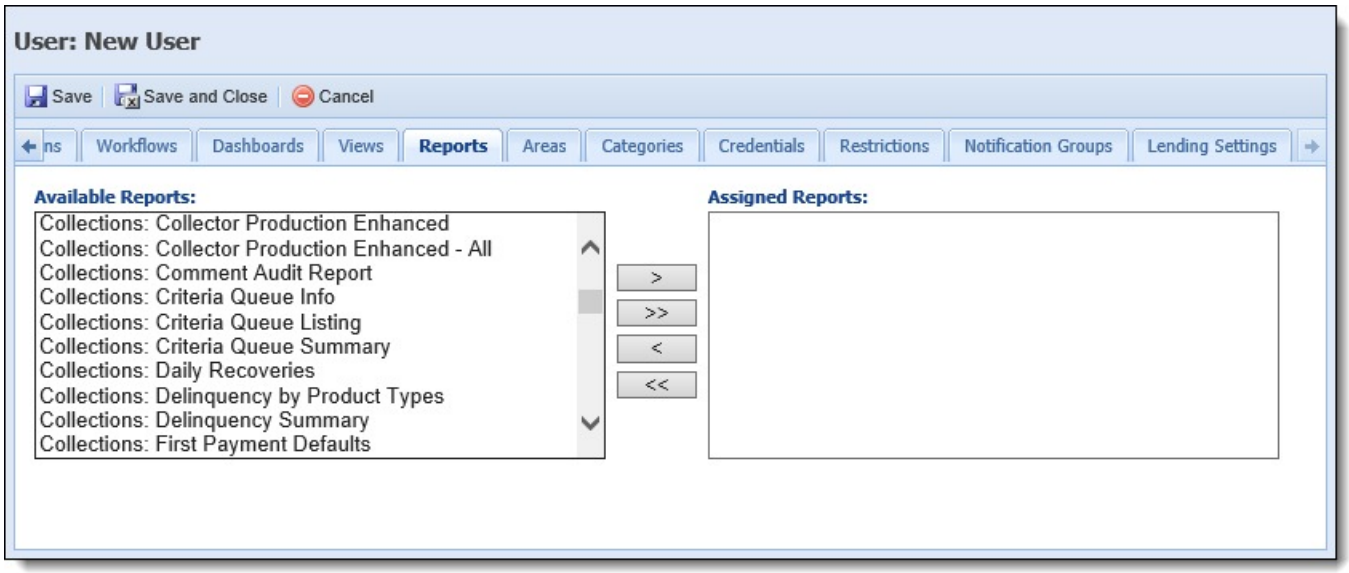
> If the security group the user is assigned to has access to the view, by default the user has access to the view even if they do not at the user level.



Reports

In the Reports tab, assign available reports to the user. If assigned, the user has the ability to view/run the reports from the reports icon in the Ribbon Bar.

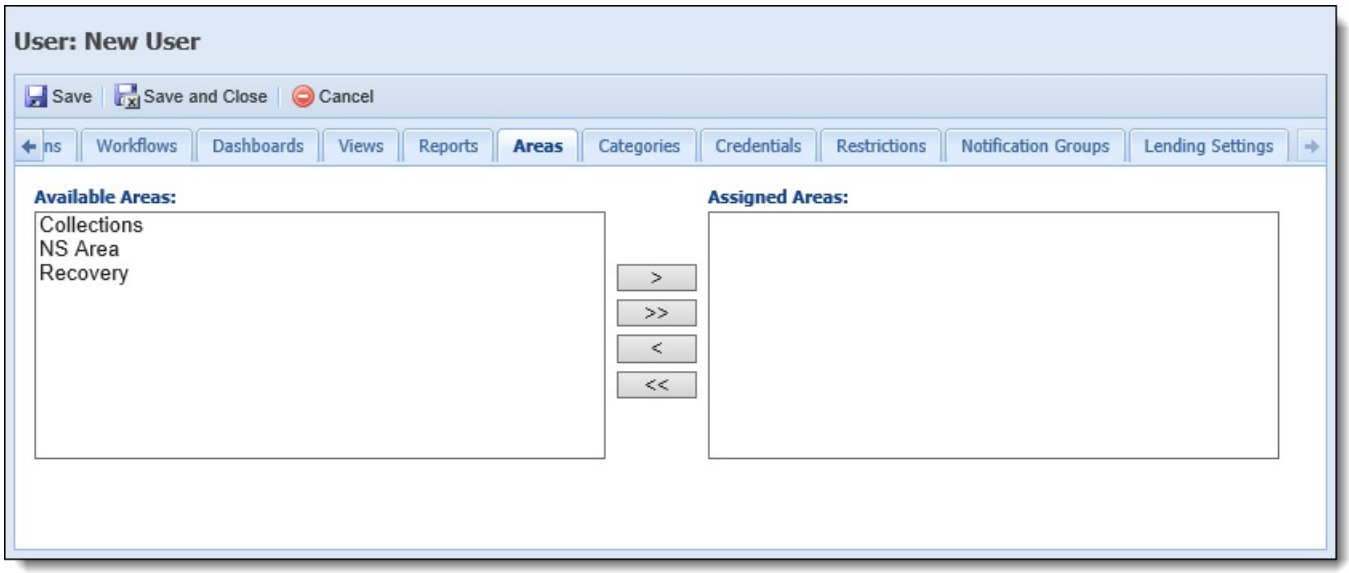
> If the security group the user is assigned to has access to a report, the user has access to the report by default, even if he or she does not have access at the user level.



Areas

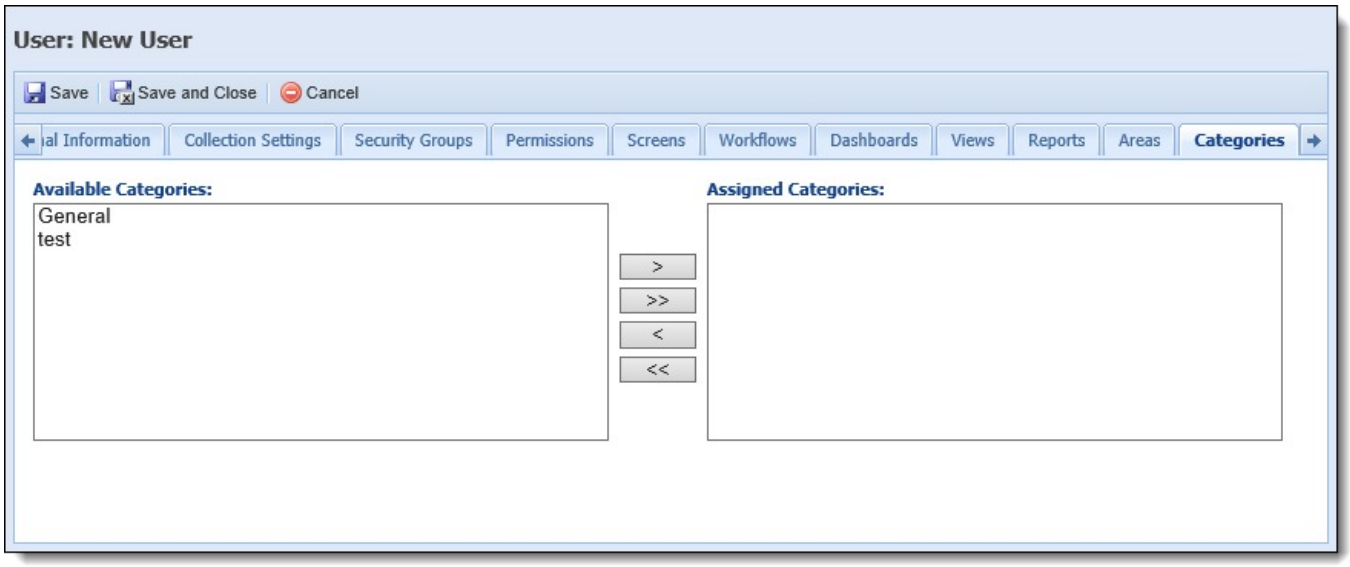
In the Areas tab, assign available areas for the Account Servicing modules to the user. These assigned areas are available to the user in the Areas drop-down in the person workspace.

> If the security group the user is assigned to has access to the area, the user has access to the area by default, even if he or she does not have access at the user level.



Categories

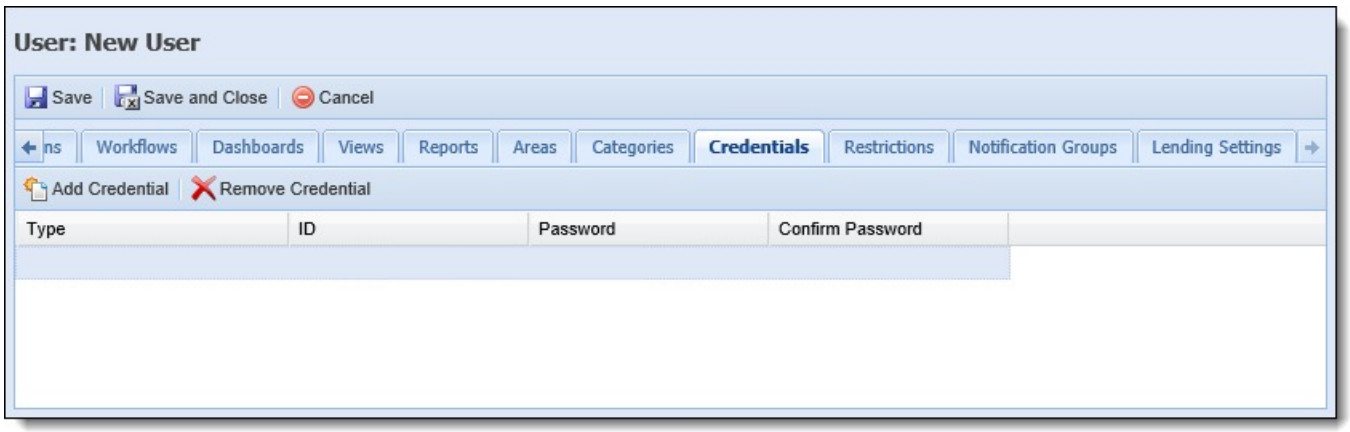
> This functionality is no longer used in Temenos Infinity, and will be removed from the User attributes in an upcoming product release.



Credentials

User Credentials enable administrators to assign the user specific IDs required for certain functionality throughout Temenos Infinity.

> Credentials may be used as a prerequisite when activating certain third party connectors within Temenos Infinity. For more information on whether credentials are required for a connector, refer to the applicable Connector Guide.



Administrators can add and remove credentials for a user by means of the Credentials toolbar. Once a credential is added, the below attributes may be assigned in the grid displayed:

If desired, the Connector Credentials Import Process can be manually run on demand from the server where Temenos Infinity is installed to import user level connector credentials from an Excel file, and automatically populate the credentials within the Credentials tab for each user in the file. Reference the Connector Credentials Import section below for more information on this functionality:

Connector Credentials Import

The Connector Credentials Import process provides the ability to easily import third party credentials for all users with access to a connector's functionality, rather than separately adding credentials for each user within the Credentials tab. A system administrator or IT Support representative for the institution can manually run this process on demand from the server where Temenos Infinity is installed.

The following section provides an overview of the steps to take to import connector credentials for each active user in Temenos Infinity:

> This process does not create new users in the database. In order to import credentials for a user, the user must be active in Temenos Infinity, and have access to the applicable connector.

Step One: Create and Export Report of Active Users

Prior to running the Connector Credentials Import process, system administrators can create a report from the Reports page in the Ribbon Bar that identifies the username for each active user in Temenos Infinity. The following fields can be added to the report within the Fields tab of the Report Configuration window to generate a list of the usernames:

- User > Username
- User > First Name
- User > Last Name
- User > Is Active

Once created, the report can be run, and then exported to Excel.

> If desired, system administrators can also configure a View to include the above fields, which generates a list of the usernames for all active users, and is able to be exported to Excel in the same manner as a report.

After the Excel file is created, system administrators can save the file locally, and use it as a base to create the import file for the Connector Credentials Import process.

Step Two: Create the Import File for the Credentials Import Process

The Excel file of active users can be used as a base to create the file for the Connector Credentials Import process. System administrators can export an Excel file with credentials from the applicable third party, and then add the credentials to the Excel file created with the user information from Temenos Infinity.

Each file must include the following three columns of information, and a row for each active user having credentials imported for the connector:

> If the Import file is not structured in the following format, the credentials in the file are not able to be imported, and an error is recorded in the Log File during the Import process.

Column	Description

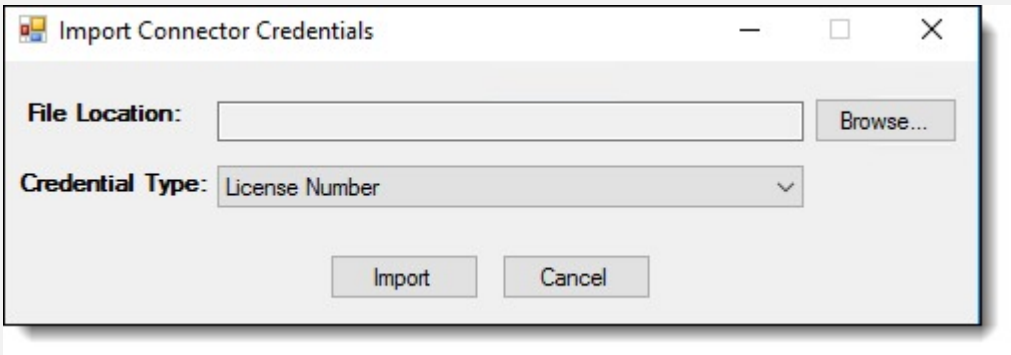
LMS User Name	The username assigned to the user in Temenos Infinity. This value is used to map the third party credentials to the correct user during the import. The system populates the associated Connector User Name and Connector Password from the file in the Credentials tab for the user once the Import process completes.
Connector User Name	The username assigned to the user for the third party connector. This value populates within the ID column of the Credentials tab for the user once the Import process completes.
Connector Password	If a password is required, this column includes the value assigned to the user as a password for the third party connector. If a password is not required for the connector, this column can be left blank. The system populates this value within the Password column of the Credentials tab for the user. For information on whether a password is required for a specific connector, please see the Configuring the Connector topic in the applicable Connector Guide.

Step Three: Run the Connector Credentials Import Process

After the Import file has been created and saved for the connector, the LMS.Core.CredentialsImport exe file process can be manually run from the institution's server.

To run this process:

- Open File Explorer on the server where Temenos Infinity is installed for the institution.
- Select the exe folder.
- Within the exe folder, right-click on the LMS.Core.CredentialsImport process, and select **Run as Administrator**.
- A window appears to import the file for the Connector Credentials Import process.



- Within the window, click **Browse...** to navigate to the location where the Credentials file is saved. Once the file is selected, the path populates within the File Location box in the Import window.
- After the file is located, select a value from the Credential Type drop-down to identify the connector for which the credentials are being imported. This drop-down includes a list of all active connectors for the institution, and identifies the Credential Type to be added to the Credentials tab for each user in the file.
- Once the File Location and Credential Type are identified, click **Import**.
- During the import, the system attempts to add a connector credential instance to the Credentials tab in System Management > Users for each user, or row, in the Import file. A Log File is also created on the Share Path to provide an overview of the Import results, including the reasons for any errors.

- If the process is successful, a message is received to inform that all credentials were imported successfully, and the following information populates within the Credentials tab for each user in the file:
  - Type is populated with the value identified in the Credential Type drop-down for the import.
  - ID is populated with the value of the Connector Username listed in the file for the user.
  - Password is populated with the value of the Connector Password listed in the file for the user.

    If a password is not required for the connector, a blank value populates within the Password column for the user.
- If any credentials cannot be imported due to errors, the process does not fail, but a message is received to inform that all records could not be imported successfully.

Step Four: Review Log File

When the Connector Credentials Import process is run, a Log File is automatically created on the Share Path to provide an overview of the Import results for each Credential Type.

The Log file for the Connector Credentials Import can be accessed by navigating to the share folder on the server where Temenos Infinity is installed, selecting the Log folder, and then opening the Connector Credentials Import file.

This file contains a section for each credential type imported during the Connector Credentials Import process, including the date and time the import was run, as well as the following information about the results of the Import:

- Count of the total number of records in the file.
- Count of the number of records successfully created.
- Count of the number of records with errors.

If a failure occurs, a separate "Failed" entry appears in the file for each record that failed to import for the credential type. This entry lists the number of the record that could not be imported, the LMS username associated with the failed record, the connector username associated with the failed record, and an error message that identifies the reason for the failure. Reference the table below for an overview of the error messages that may appear for a failed record in the Log File for the Connector Credentials Import:

Error Message	Received When
User Name not found	The LMS User Name column does not match an existing user in Temenos Infinity.
Multiple matches found for User Name	The LMS User Name matches multiple users from Temenos Infinity.
Password required	A password is required for the Credential Type, and no password is supplied in the file.
Invalid file format	The Import file is in an incorrect format.

The Microsoft Access database engine cannot open or write to the file. It is already opened exclusively by another user, or you need permission to view and write its data.	The Log File is open while the Connector Credentials Import process is being run on the server.

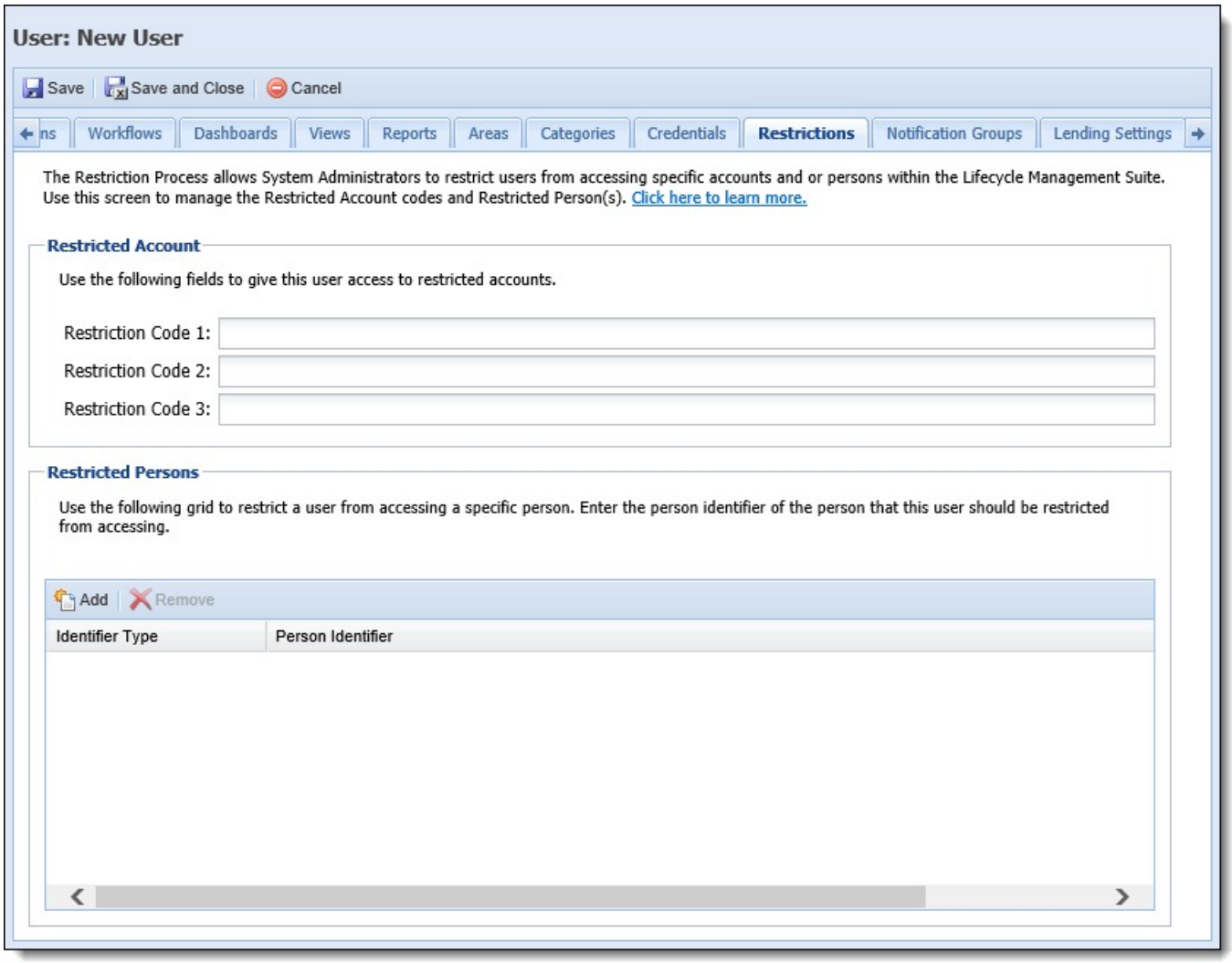
Field	Description
Type	Select the type of user credential being added for the user. Credentials may be system-defined, or specific to a connector. The following credentials are system-defined: • License Number - Used to identify the user that creates a loan application. This value is stored on an application when it is created. • NMLS - Used to identify the users that have obtained an NMLS license.
ID	Enter the ID, or username, assigned to the user for the third party connector.
Password	If a password is required, enter the user's password for the third party connector. Not all connectors require a password for their user credential; however, if a password is required for a connector, a value must be entered within this field, or an error is received when trying to save the User Edit screen. For the system-defined credentials, License Number does NOT require a password, while the NMLS credential does require a password to be entered. For information on whether a password is required for a specific connector, please see the Configuring the Connector topic in the applicable Connector Guide.
Confirm Password	If a password is required, re-enter the password defined in the Password field.

Restrictions

Restriction Codes are used to identify accounts containing personal information for individuals employed by or related to a financial institution.

This section allows system administrators to restrict users from accessing specific accounts within Temenos Infinity. System administrators can assign codes to a user, which grant the user access to accounts that are restricted. Additionally, system administrators can prevent users from accessing a person's account by adding the person's identifier to the Restricted Persons grid.

In order to view an account, the user must be granted permission based on both the Restriction Code and Restricted Persons.



Restricted Account

Account Restriction allows access to restricted accounts to be controlled on an account by account basis. Permissions are set on each user to give access to restricted accounts.

To enable Account Restriction in Temenos Infinity, select the "Enable Account and Person Restrictions" check box on the Security Tab in System Management > Administrative Settings.

The restriction level on an account is determined by the Temenos Account Restriction Code field. If Account Restriction Processing is enabled in Temenos Infinity, then a user must be given the appropriate permissions in order to view restricted accounts.

By default, all users have access to accounts with a 0 or no Account Restriction Code. To grant a user access to restricted accounts, enable access within the Restricted Account section by entering a value in each applicable Restriction Code field. The possible value for the Restricted Access field on each account are 0-6. The numeric values represent the following types of restricted accounts:

(0) Normal
(1) Restricted
(2) Sensitive
(3) Employee
(4) Employee Family
(5) Employee Sensitive
(6) Employee Sensitive Family

In order for a user to view an account with a Restricted Access level of 1 or higher, the user must have an Account Restriction Access of an equal or greater value. For example, if an account has a Restricted Access level of 3, then a user must have a 3, 4, 5, or 6 entered in the "Restriction Code 1" field in order to view the account.

Restricted Person

System administrators can restrict persons from a user, which prevents that user from gaining access to the person's account workspace. When a person is restricted, all of the person's related accounts and cases are also restricted. If the user tries to access a restricted person through a search, or when working a queue, a message appears stating that the person/account requires special permission to view.

The system uses the following logic to populate accounts for restricted and non-restricted persons in the workspace:

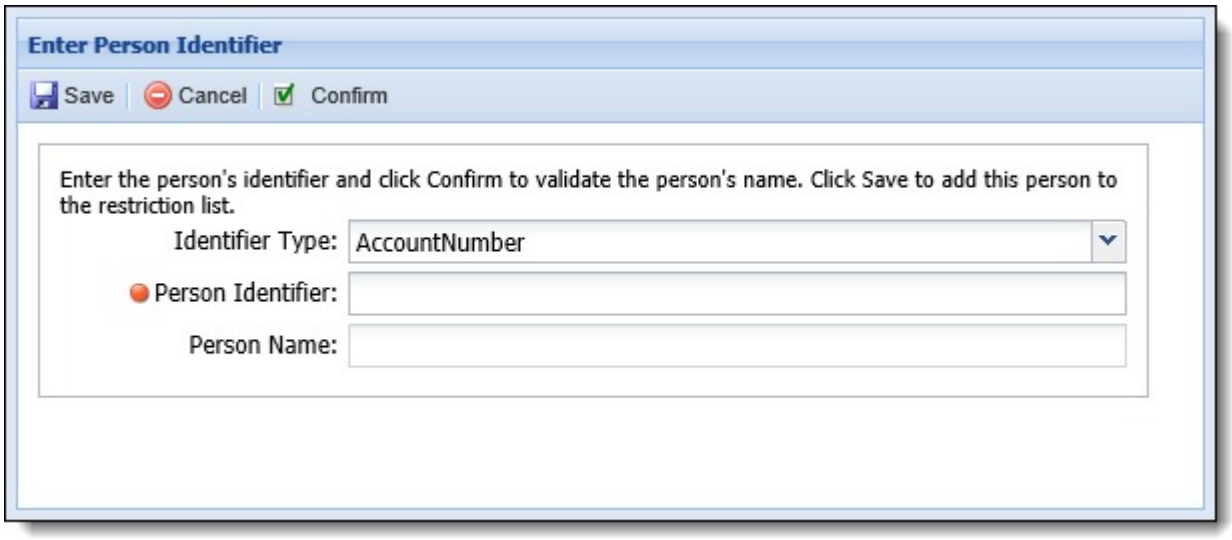
- If a person is restricted, accounts related to the person are not displayed in the workspace, regardless of whether the person is primary or joint.
- If an account includes a joint owner, and both the primary and joint are restricted, accounts related to both persons are not displayed in the workspace.
- If the primary is not restricted, but the joint is restricted, only accounts related to the primary that do not include the joint owner display in the workspace.
- If the primary owner is restricted, but the joint owner is not restricted, only accounts related to the joint owner that do not include the primary are displayed.

Reference the example below for an overview of this functionality:
John is an employee of ABC Financial. He has two accounts at the institution, under membership #12345, on which he is primary, and his wife Jane is a joint owner. Jane also one account of her own under membership #67890. Since John is an employee, users are restricted from accessing his accounts in the workspace; however, Jane is not a restricted person. When Jane contacts the Call Center for ABC Financial, she is only able to conduct business on the one account under her membership #67890 that does not include John; any accounts related to John are not displayed, as they are restricted from appearing in the workspace.

To add a person restriction for a user:

- Click

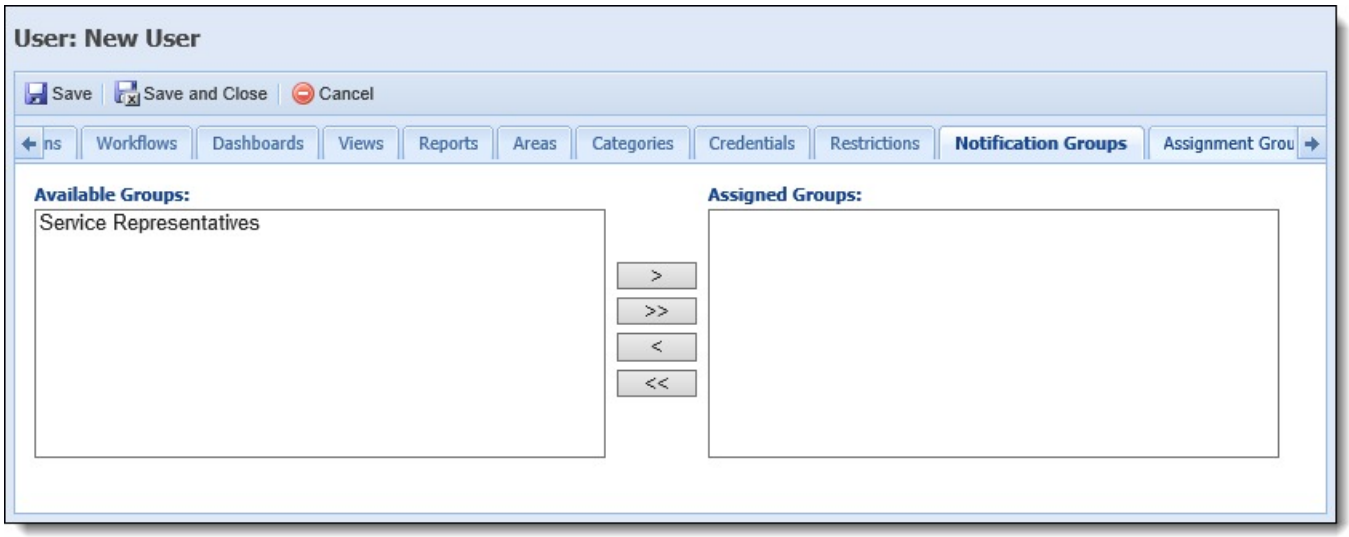
within the top of the Restricted Persons grid.
- A screen appears asking for the Person Identifier of the person to be restricted.



- Select the Identifier Type, and enter the Person Identifier for the person being restricted.
- When complete, click Confirm.
- Upon clicking Confirm, the person's name appears under the Person Identifier.
- If correct, click Save. The Person Identifier is added to the grid.

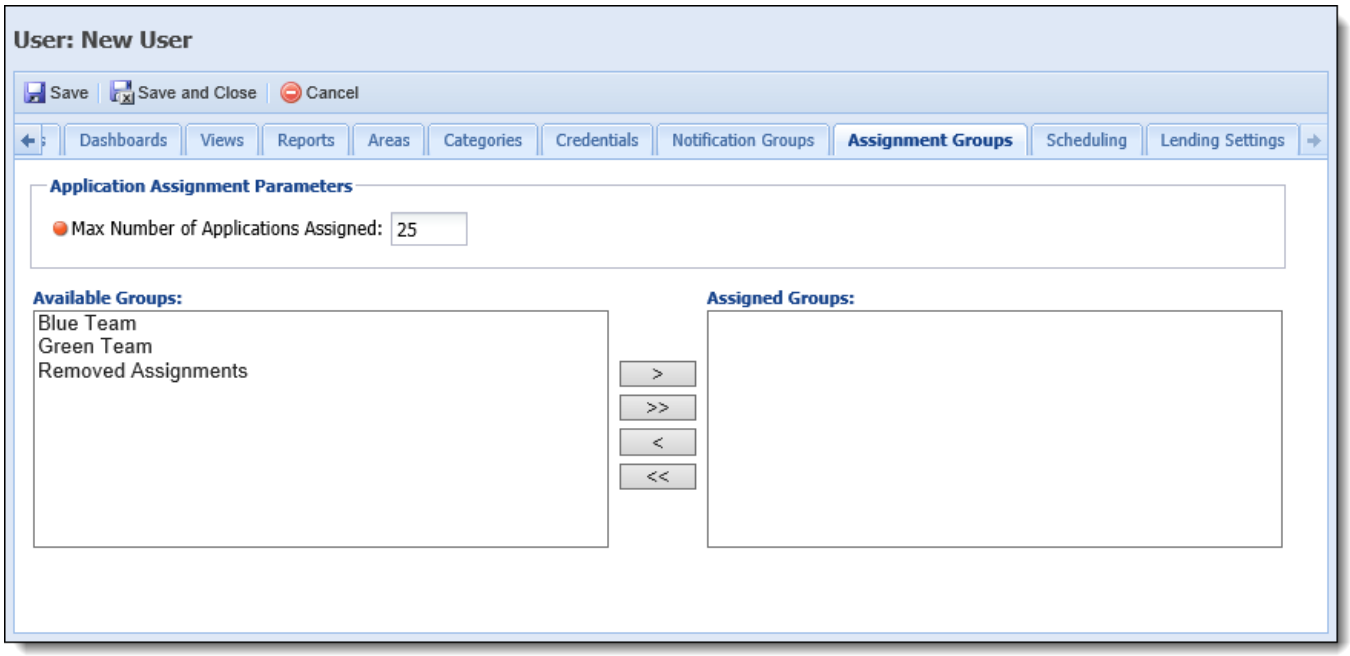
Notification Groups

In the Notification Groups tab, assign available notification groups to the user. If assigned, the user has the ability to receive notifications when a comment is added to an application via email or from the Notifications icon in the ribbon bar.



Assignment Groups

In the Assignment Groups tab, assign the user to the applicable Assignment Groups.



Application Assignment Parameters

Field	Description
Max Number of Applications Assigned	Enter the maximum number of applications that can be assigned to the user. This is a required field. By default, this parameter is set to 25. If the assigned user has reached or exceeded the Max Number Applications Assigned, a notification is sent to the Notification Group associated with the Assignment Group.

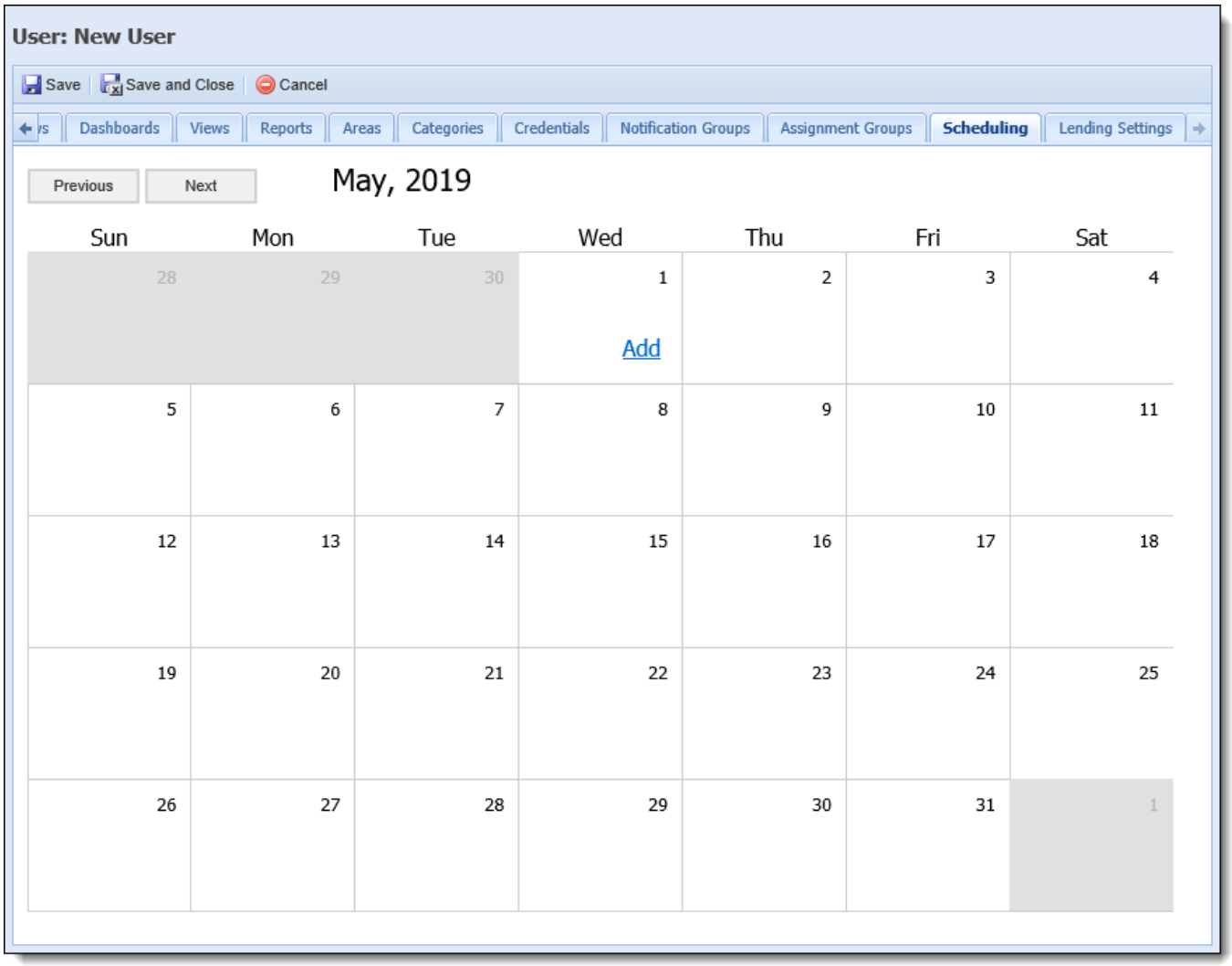
Available/Assigned Groups

Assign available assignment groups to the user. If assigned, the user is able to have applications automatically assigned.

For more information on Assignment groups, please see the Assignment Groups topic in this guide.

Scheduling

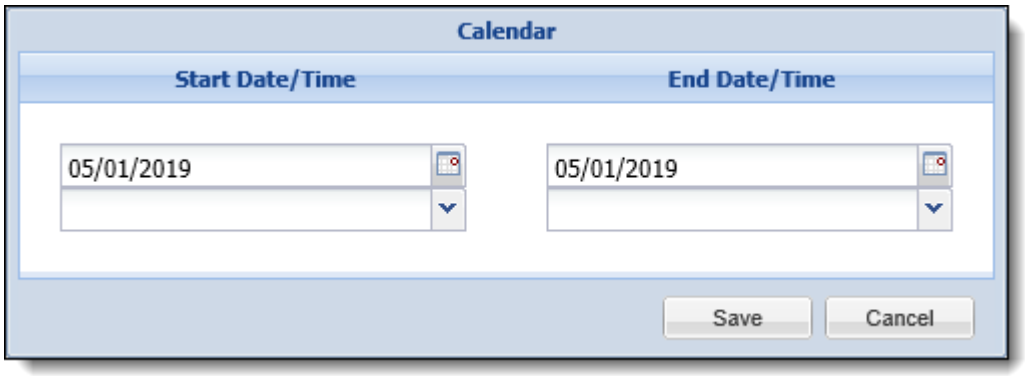
The Scheduling tab enables administrators to identify a user's scheduled time off, so that applications are not assigned to the user during a time that he or she is not available to work applications.



The Scheduling tab includes a calendar that displays the days and times that the user is not available to work applications.

At the top of the calendar, administrators are able to click Previous to go back to the previous month, and click Next to advance to the next month.

To establish a schedule, hover over the desired day, and click **Add** to open the Calendar pop-up window.



Within the Calendar window, use the Date/Time controls to set the user's schedule.

- Click the to open the calendar control. Select the Start/End Date.

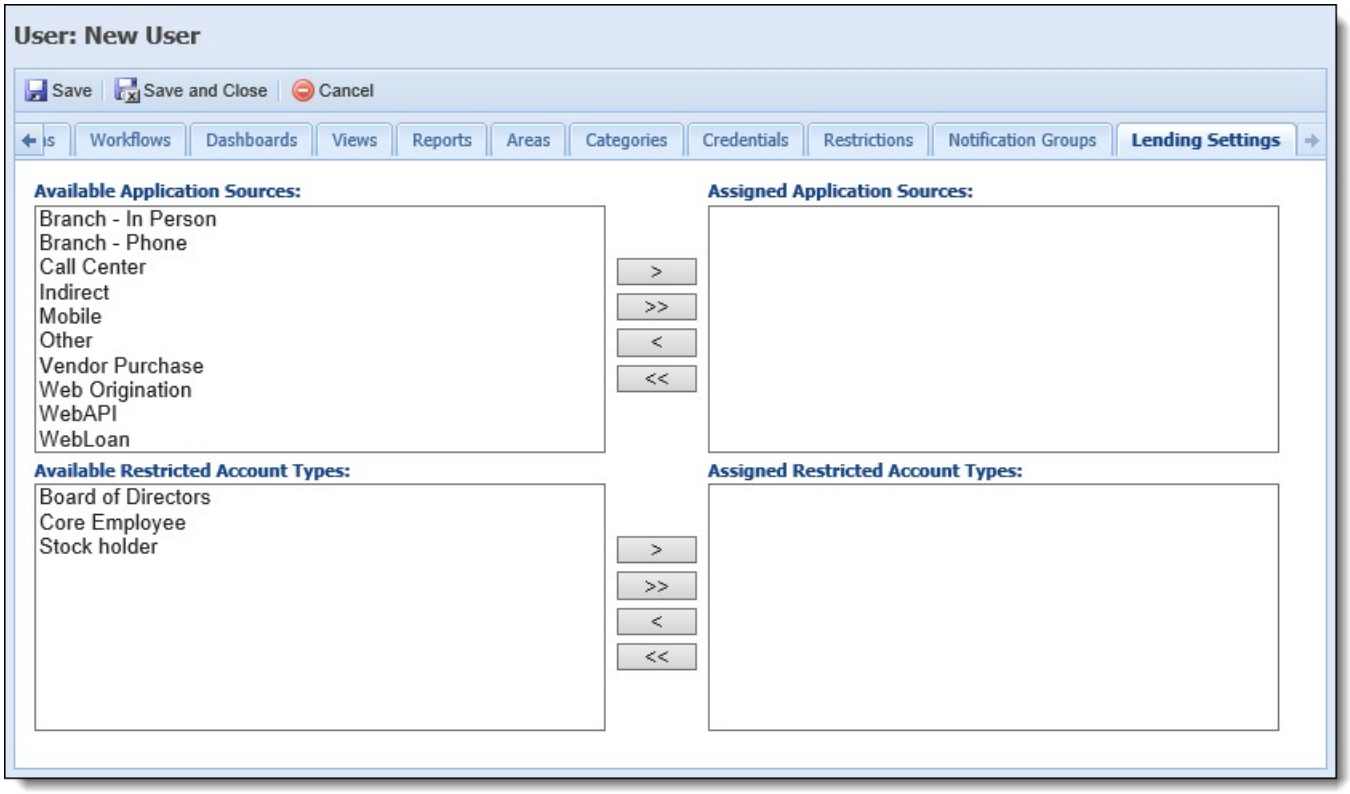
> Administrators are able to select a date range to set the schedule for multiple days at once.

- In the field beneath the date, click the to select the Start/End Time.
- Click **Save** to retain the Time/Date, or **Cancel** to discard the Time/Date.

Once a schedule is set, the Start/End Time displays in the calendar within Scheduling tab.

Lending Settings

Lending Settings enables administrators to assign Application Sources and Restricted Account Types to each user working in the Origination module.



Create and Managing Users

Create Users

To create a user:

- Click Create. The New User screen appears.
- Complete the desired attributes within each tab.
- When finished navigating through all of the tabs, and correctly entering information, click Save and Close to retain the new user, and return to the Users page.
- The new user populates in the Users page, and can now be assigned to features throughout Temenos Infinity.

Copy Existing Users

To copy an existing user:

- Select a user within the grid on the Users page, and click Copy.
- Modify the information on each tab as needed.
- Once all attributes have been defined, click Save and Close.

Edit Existing Users

To edit an existing user:

- Select a user within the grid on the Users page, and click Edit.
- Modify the information on each tab as needed.
- Once all attributes have been updated, click Save and Close.

Unlock Deactivated Users

When a user is deactivated, the Active check box on the General tab is disabled.

To unlock a user that has been deactivated, perform the following actions:

- Select the deactivated user within the grid on the Users page, and click Edit.
- Within the User Information section of the User Information tab, select the Active check box.
- Click Save and Close to retain the user settings.

Delete Users

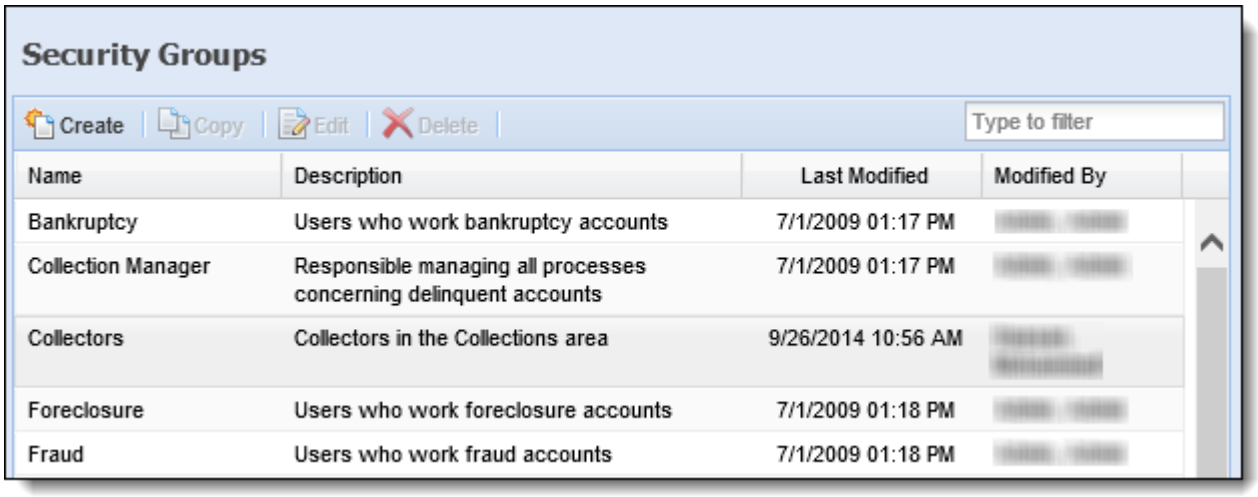
To delete a user:

- Select a user within the grid on the Users page, and click Delete.
- A confirmation message appears to confirm that the user should be deleted. Click **Yes** to delete the user, or **No** to retain the user.

Security Groups

Security Groups are designed so that managers can set Temenos Infinity access for an entire group. Rather than going through the process of assigning individual user permissions and access to features for every employee, administrators can assign permissions to Security Groups to provide access to all Temenos features that can be set at the individual user level.

Security Groups can be created and managed from System Management > Groups > Security Groups.



The Security Groups page displays the following columns of information about each Security Group:

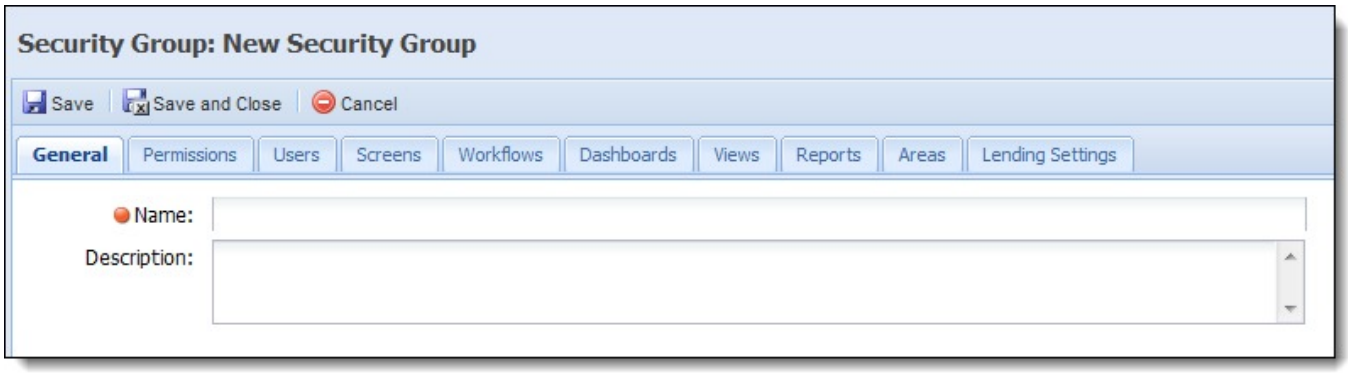
Column Name	Description
Name	The name of the Security Group.
Description	The description of the Security Group.
Last Modified	Denotes when the last modification to the Security Group was made.
Modified By	Denotes who made the last modification to the Security Group.

Security Group Attributes

All security groups have common attributes that are defined while creating, copying, or editing a security group.

General

The General attributes include the basic information about the security group.



The following General security group attributes are defined in the General tab:

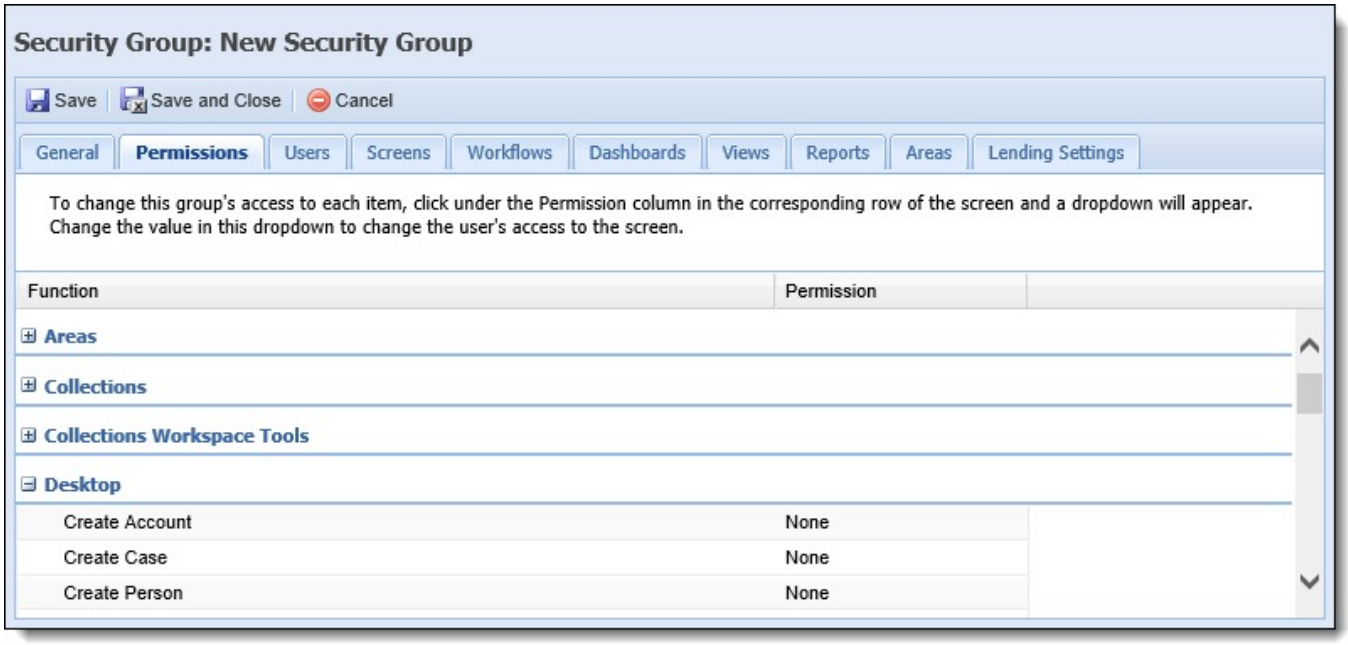
Attribute	Description
Name	Provide a name for the Security Group. This is a required field.
Description	Provide details about the Security Group.

Permissions

Use the Permission attribute, located in the Permissions tab, to manage the new Security Group's access to several features throughout Temenos Infinity. This tab contains 2 columns: Function and Permission. Click under the Permission column in the corresponding row of the screen and a drop-down appears. Change the value in this drop-down to assign the security group access to the function. The following permission options are available within the permission drop-down:

None: The selected the user does not have permission to view or execute the feature.
Change: The selected the user has full access to the feature. User can view and edit.
View: The user has the ability to view the function but does not have the ability to change or execute it.

> If an individual user permission is set to "None" but the user is a part of a Security Group that has "Change" permission to the same feature, the system defaults to "Change." The higher permission between the user and group level is systematically set.



Below is a list of the permissions that can be customized by the administrator and their description:

▸ Permissions

Below is a list of all the permissions that can be customized by the administrator and their description.

Areas	
Name of Permission	**Description**
Edit All Comments: Allows a user to edit all comments made by other users within the Workflow History screen.	**None** = Users are not able to edit other user's comments in Workflow History Screens. **Change** = Allows users to edit any other user's comments in Workflow History screens.

Edit Own Comments: Allows a user to edit only comments made by the same user within the Workflow History screen.	**None** = Users are not able to edit their own comments in Workflow History screens. **Change** = Allows users to edit their own comments in Workflow History screens.

Collections	
Name of Permission	**Description**
Add Task: Allows a user to add tasks when working a case.	**None** = Users cannot add tasks when working a case. **Change** = When working a case, allows users to Add a Task.
Add Cash Flow: Allows a user to add a cash flow, and make a transaction.	**None** = Users cannot add a cash flow to an account. **Change** = Users are able to add a cash flow to an account.
Calculate Cash Flow Payments: Allows users to calculate payments when adding a cash flow, or editing a cash flow.	**None** = Users cannot calculate an account's cash flow. **Change** = Users are able to calculate payments when adding, or editing a cash flow.
Case Processes: Allows a user to view, edit, delete and create changes to case processes within System Management. Changes made in System Management are reflected when working a case in the workspace.	**None** = Users can not view or access the Case Processes page in System Management > Collections > Case Processes. **View** = Allows users to view but not make any changes to the Case Processes page in System Management > Collections > Case Processes. **Change** = Allows users to view and make changes within the Case Processes page in System Management > Collections > Case Processes.

Case Queues: Allows a user to view, edit, delete, and create changes to case queues within System Management. Changes made in System Management are reflected when working a case in the workspace.	**None** = Users can not view or access the Case Queues page in System Management > Collections > Case Queues. **View** = Allows users to view but not make any changes to the Case Queues page in System Management > Collections > Case Queues. **Change** = Allows users to view and make changes within the Task Queues page in System Management > Collections > Case Queues.
Case Tasks: Allows a user to view and make changes to Task Processes and Task Templates within System Management. Changes made in System Management are reflected when working a case in the workspace.	**None** = Users can not view or access Task Processes or Task Templates in the Tasks folder in System Management. **View** = Allows users to view but not make any changes to any of the Task Processes and Task Templates in the Tasks folder in System Management. **Change** = Allows users to view and make changes to Task Processes and Task Templates in the Tasks Folder in System Management.
Case Types: Allows a user to view and make changes to various case types that are reflected in the workspace.	**None** = Users can not view or access the Case Types page in System Management. **View** = Allows users to view but not make any changes to the Case Types page in System Management. **Change** = Allows users to view and make changes within the Case Types page in System Management.

Collection Queues: Allows a user to view and make changes to Collection queues that are reflected in the workspace. Collection queues include features such as Collection Queue Refresh Order and Collection Queue Work Order.	**None** = Users can not view or access the Collection Queues, Collection Queue Refresh Order, and Collection Queue Work Order pages in System Management > Collections. **View** = Allows users to view but not make any changes to the Collection Queues, Collection Queue Refresh Order, and Collection Queue Work Order pages in System Management > Collections. **Change** = Allows users to view and make changes within the Collection Queues, Collection Queue Refresh Order, and Collection Queue Work Order pages in System Management > Collections.
Create Collateral Equity Analysis: Allows a user to create Equity Analysis on a collateral screen within a person workspace.	**None** = Users cannot create an Equity Analysis within a person's collateral screen. **Change** = Allows users to create an Equity Analysis from within a person's collateral screen.
Edit Cash Flow: Allows a user to perform transactions and update cash flow fields, but not calculate payments.	**None** = Users can not view or update the details of a cash flow. **View** = Allows users to view, but not make any changes to the details of a cash flow. **Change** = Allows users to view and make changes to the details of a cash flow.
Edit Collateral Equity Analysis: Allows a user to edit existing equity analysis located on a person's collateral screen in the workspace.	**None** = Users cannot edit an existing Equity Analysis from within a person's collateral screen. **Change** = Allows users to edit an existing Equity Analysis from within a person's collateral screen.

Edit Expenses: Allows a user to add and edit expenses within the Expenses - Account screen in the workspace.	**None** = Users cannot add or edit expenses within the Expenses - Account screen. When the screen opens in the workspace, the toolbar is not available, and the screen displays as read-only. **Change** = Allows users to add and edit expenses within the Expenses - Account screen.
Edit Letters: Allows a user to edit the letters assigned to a Send Letter Workflow step.	**None** = Users are unable to edit letters in the Send Letter workflow step. When View/Print is clicked in the workflow step, the letter opens in a PDF document, which does not permit changes. **Change** = Allows users to modify letters in the Send Letter workflow step. When View/Print is clicked in the workflow step, the letter opens in an editable Word document.
Edit Promise Payments: Allows a user edit existing promise payments made within the person workspace.	**None** = Users cannot edit promise payment arrangements, or cancel promises in the Promises screen. **Change** = Allows users to edit promise payment arrangements, and cancel existing promises in the Promises screen.
Edit Promise Status: Allows a user to edit the promise status of an existing promise made in the person workspace.	**None** = Users cannot edit promise statuses in the Promises screen. **Change** = Allows users to edit promise statuses in the Promises screen. This permission should only be given to administrators. Changing the promise status does not update promise reports/dashboards and should not be normal practice.

End Exclusive Rule Authoring Session: Allows a user to end an exclusive Rule Authoring session in System Management > Collections > Rules Management.	**None =** User is not able to end the exclusive rule authoring session of another user in Rules Management. The End Session button is disabled within the Rule Sessions tab. **Change =** User is able to end the exclusive rule authoring session of another user in Rules Management. The End Session button is enabled within the Rule Sessions tab.
Event Processing: Allows a user to create and maintain event and action pairings.	**None** = Event Processing screen within System Management is not available to user. **View** = Event Processing screen within System Management can be viewed but not edited by user. **Change** = Event Processing screen within System Management screen can be viewed and edited by user.
Phone Number Classification: Allows a user to enable and configure Phone Number Classification within System Management.	**None** = Users do not have access to the Phone Number Classification page in System Management. **Change** = Users have access to and can configure Phone Number Classification within System Management.
Profile Import: Allows a user to access and change various profile import settings in System Management > Collection > Profile Import	**None =** Users do not have access to the Profile Import page in System Management. **View =** Users have access to the Profile Import page in System Management, but are not able to make any changes to the configurations. **Change =** Users are able to both access the Profile Import page in System Management and update the configurations.

Promise Approval: Allows a user to access and change various promises awaiting approval.	**None** = Users do not have access to the Promise Approval page in System Management and are not able to respond to promises pending approval. **Change** = Allows users access to the Promise Approval page in System Management and they are able to respond to promises pending approval.
Recovery Approval: Allows a user to view and process pending charge offs within System Management. This permission is only available to institutions using Temenos Infinity's Recovery module.	**None** = Users do not have access to the Recovery Approval page in System Management and are not able to respond to charge-offs pending approval. **View** = Users have access to the Recovery Approval page in System Management but are not able to accept and/or reject charge-offs. **Change** = Users are able to both access the Recovery Approval page in System Management and process pending charge-offs.
Rules Management: Allows a user to access the Rules Management application. The Rules Management application allows users with proper permissions to view and create rules to apply in various contexts throughout the system.	**None** = Users do not have access to the Rule Management page in System Management > Collections, and do not have the ability to view/open the rules manager in various other areas in the system that utilize the rules integration. **Change** = Allows users access to the Rules Management application throughout the system.

View Masked Fields: Allows a user to view the value of masked fields in the workspace.	**None =** User is unable to view the value of masked fields in the workspace. When the user hovers over the icon for a masked field, a tool-tip is presented to the user to identify that permission to unmask the field is not enabled **View =** User is able to view the value of masked fields in the workspace. Clicking the icon unmasks the value of the field in the workspace. Check out the View Masked Fields Permission video to see this permission in action!

Workspace: Allows a user to perform various functions within the person workspace, such as writing comments or working a queue, as well as grants the user permission to use the Search feature within the Ribbon Bar.	**None =** Users are not able to perform various functions within the workspace, such as posting a comment, or working a queue, and can not access workspaces from the Queues, Views, and/or Dashboards page. When set to None, the user is also unable to use the Search feature; therefore, the is disabled in the Ribbon Bar. **View =** Allows users to view comments and queues in the workspace, but not work queues. When set to View, users are able to access workspaces from the Queues, Views, and/or Dashboards page, and use the Search feature; however, only screens and workflows that the user is assigned permission to are available in the Left Navigation Panel, and no changes can be made to any screens and/or workflows in the workspace. **Change =** Allows users to perform various functions in the workspace, such as posting a comment, and working queues. When set to Change, users can access workspaces using the Search feature, as well as from the Queues, Views, and/or Dashboards page, and are able to perform all functions for the selected account or person in the workspace. In addition to having View or Change permission for the Workspace, a user must also be assigned to the specific queue, view, or dashboard in order to open the workspace for the account or person.

All Custom Searches configured for an institution are available within the Search window for any user who is granted permission to use the Search feature.

For institutions that use both Account Servicing and Origination: There are two separate permissions that control the Search feature for the Account Servicing categories and Origination categories; therefore, it is possible that a permission may be set to View or Change for one, but set to None for the other. When this occurs, the user is only able to use the Search feature for the modules to which he or she is granted permission to access. For example, the Origination Workspace permission under the Application Processing category controls the Search feature for the Origination modules. If the Workspace permission is set to View or Change, but the Origination Workspace permission is set to None, the user is able to click in the Ribbon Bar to perform a full search using the Account Servicing categories, but the Origination categories are not available to the user, and the user is not able to open applications from the Queues, Views, and/or Dashboards page.

Desktop	
Name of Permission	**Description**
Create Account: Allows users to create a person account from the Ribbon Bar.	**None** = Users are not able to access the create accounts drop down option or create accounts from the Ribbon Bar. **Change** = Allows users to create accounts from the Create Accounts dropdown in the Ribbon Bar.
Create Case: Allows a user to view and create cases while working a person workspace.	**None** = Users are not able to see or create cases using the “briefcase” icon in the workspace toolbar. **Change** = Allows users to create cases using the “briefcase” icon in the workspace toolbar.
Create Person: Allows a user to create a person from the Ribbon Bar.	**None** = Users are not able to see the "Create Person" menu option. **Change** = Allows users to create persons using the Create drop-down in the Ribbon Bar.
Dashboards: Allows a user to view and change Dashboards from the Ribbon Bar. Dashboards are groups of different Web Parts in the system. Web Parts are predefined information boxes that display information about queues, user performance and applications. Views and reports can also be added to dashboards.	**None** = Users have limited to no access to the Dashboards page in the Ribbon Bar, depending on their assigned dashboards. If no dashboards are assigned to the user or security group, the Dashboards icon is not displayed in the Ribbon Bar. If the user or security group is assigned one or more dashboards, the Dashboards icon appears in the Ribbon Bar, but the Dashboards page opens in view mode. **View** = Allows users to view the Dashboards list in the Dashboards page, but not run dashboards. **Change** = Allows users to view the list of dashboards, and run dashboards from the Dashboards page .

Reports: Allows a user to view and create an unlimited amount of reports from the Ribbon Bar. Reports can be run on-demand by anyone who has permission to run the report or can be scheduled to run at certain times.	**None =** Users have limited to no access to the Reports page in the Ribbon Bar, depending on their assigned reports. If no reports are assigned to the user or security group, the Reports icon is not displayed in the Ribbon Bar. If the user or security group is assigned one or more reports, the Reports icon appears in the Ribbon Bar, but the Reports page opens in view mode. **View =** Allows users to view the Reports list in the Reports page, but not run, see history or design any reports. **Change =** Allows users to view the list of reports, run reports, see history, and design reports from the Reports page.
Run Non-Person Workflow: Allows a user to view and run non-person workflows within the Ribbon Bar.	**None =** Users do not have access to the Non-Person workflow option in the Ribbon Bar. **Change =** Allows users to run non-person workflows from the Create drop-down in the Ribbon Bar.
View Full TIN in Search Results: Allows the full TIN to show when searching an account, not just the last four digits.	**None =** Allows users to only view the last 4 digits of a TIN when using the search function. **View =** Allows users to view the entire TIN when using the Search function.
View System Exceptions: Allows a user to view the all of the error exception details and the error description in the Event Log.	**None** = Users are unable to access the error exception details and error description in the Event Log. **View** = Users are able to access the error exception details and error description in the Event Log.

Views: Allows a user to view and change Views from the Ribbon Bar. Views are interactive reports that can be run any time by anyone who has permissions to run the view.	**None =** Users have limited to no access to the Views page in the Ribbon Bar, depending on their assigned views. If no views are assigned to the user or security group, the Views icon is not displayed in the Ribbon Bar. If the user or security group is assigned one or more views, the Views icon appears in the Ribbon Bar, but the Views page opens in view mode. **View =** Allows users to view the Views list in the Views page, but not run views. **Change =** Allows users to view the list of views, and run views from the Views page.

Loan Modifications	
Name of Permission	**Description**
Create Loan Modification: Allows a user create a loan modification from the Loan Modification History screen in the workspace. Creating a loan modification allows a user to edit any loan specifications relevant to the loan.	**None** = Create button is disabled on the Loan Modification History screen. **Change** = Create button is enabled on the Loan Modification History screen.
Delete Loan Modification: Allows a user to delete any existing loan modifications.	**None =** Delete button is disabled on the Loan Modification History screen. **Change =** Delete button is enabled on the Loan Modification History screen.
Edit Loan Modification: Allows a user to edit any existing loan modifications.	**None** = Edit button is disabled on the Loan Modification History screen. **Change** = Edit button is enabled on the Loan Modification History screen.

Process Loan Modification: Allows a user to process and approve any loan modifications created for a loan.	**None** = Process button is disabled on the Loan Modification History screen. **Change** = Process button is enabled on the Loan Modification History screen.

Modules	
Name of Permission	**Description**
COLLECTION: Allows a user to view and change settings within the Collection page in System Management. Any changes made within the Collection page apply to all of the Collection module in Temenos Infinity.	**None =** Users cannot view or access collection settings in System Management > Modules > Collection. **View =** Allows users to view collection settings, but not make any changes to the settings in System Management > Modules > Collection. **Change =** Allows users to view and make changes to collection settings in System Management > Modules > Collection.

System Management	
Name of Permission	**Description**
Account Assignments: Allows a user to manually assign or unassign accounts to a Collection Queue.	**None =** Users can not view or access the Account Assignments page in System Management. **View =** Allows users to view but not make any changes to the Account Assignments page in System Management. **Change =** Allows users to view and make changes within the Account Assignments page in System Management.

Account Types: Allows a user to view and change Account Types for collections. These Account Types can be mapped to various accounts within Temenos Infinity.	**None** = Users can not view or access the Account Types page in System Management. **View** = Allows users to view but not make any changes to the Account Types page in System Management. **Change** = Allows users to view and make changes within the Account Types page in System Management.
Administrative Settings: Allows a user to view and change administrative settings within Temenos Infinity. Administrative Settings can be accessed in System Management and include settings such as look and feel, security and institutional information.	**None** = Users can not view or access the Administrative Settings page in System Management. **View** = Allows users to view but not make any changes to the Administrative Settings page in System Management. **Change** = Allows users to view and make changes within the Administrative Settings page in System Management.
Alerts: Allows a user to view and edit system-wide alerts that appear each time a user logs into the system.	**None** = Users can not view or access the Alerts page in System Management. **View** = Allows users to view but not make any changes to the Alerts page in System Management. **Change** = Allows users to view and make changes within the Alerts page in System Management.
Archive Data: Allows a user to archive data, such as accounts, within Temenos Infinity. Archiving data cannot be undone. Therefore, users should be cautious with using this functionality.	**None** = Users can not view or access the Archive Data page in System Management. **Change** = Users can view and access the Archive Data page, as well as perform the Archive function.

Areas: Allows a user to access and change Areas from System Management. Areas allow users to configure the look and feel and functionality of a workspace.	**None** = Users can not view or access the Areas page in System Management. **View** = Allows users to view but not make any changes to the Areas page in System Management. **Change** = Allows users to view and make changes within the Areas page in System Management.
Automated Workflow: Allows a user to view and create automated workflows within Temenos Infinity.	**None** = Users can not view or access the Automated Workflow page in System Management > Workflow > Automated Workflow. **View** = Allows users to view but not make any changes or execute Automated Workflows within the Automated Workflow page in System Management > Workflow > Automated Workflow. **Change** = Allows users to view and make changes within the Areas page in System Management.
Batch Case Processing: Allows a user to view and perform Batch Case Processing within Temenos Infinity.	**None** = Users can not view, access, or perform the Batch Case Processing function within System Management > Batch Case Processing. **Change** = Allows users to view, access, and perform the Batch Case processing function within System Management > Batch Case Processing.
Batch Letter Printing: Allows a user to view and perform Batch Letter Printing for a previously created batch.	**None** = Users can not view, access, or perform the Batch Letter Printing function within System Management > Communication > Batch Letter Printing. **Change** = Allows users to view, access, and perform the Batch Letter Printing function within System Management > Communication > Batch Letter Printing.

Batch Workflow: Allows a user to create and execute batch workflows within Temenos Infinity.	**None** = Users can not view, access, or perform the Batch Workflow function within System Management > Workflow > Batch Workflow. **View** = Allows user to view and access the Batch Workflow page but not execute a Batch Workflow in System Management > Workflow > Batch Workflow. **Change** = Allows users to view, access, and execute Batch Workflows within System Management > Workflow > Batch Workflow.
Branches: Allows a user to create and maintain branches in Temenos Infinity.	**None** = Users cannot view or access the Branches page in System Management. **View** = Allows users to view but not make any changes to the Branches page in System Management. **Change** = Allows users to view and make changes within the Branches page in System Management.
Categories: Categories are no longer used in v14.	**None** = Users can not view or access the Categories page in System Management. **View** = Allows users to view but not make any changes to the Categories page in System Management. **Change** = Allows users to view and make changes within the Categories page in System Management.

Companies and Contacts: Allows a user to view, edit and change companies and contacts within the Address Book. These companies and contacts can be accessed throughout Temenos Infinity.	**None** = Users can not view or access the Companies and Contacts pages in System Management > Address Book. **View** = Allows users to view but not make any changes to the Companies and Contacts pages in System Management > Address Book. **Change** = Allows users to view and make changes within the Companies and Contacts pages in System Management > Address Book.
Configuration Export: Allows a user to view, edit and change Configuration Manager Exports.	**None** = Users can not view or access the Export Configurations page in System Management > Configurations. **Change** = Allows users to view and make changes within the Export Configurations page in System Management > Configurations.
Configuration Import: Allows a user to view, edit and change Configuration Manager Imports.	**None** = Users can not view or access the Import Configurations page in System Management > Configurations. **Change** = Allows users to view and make changes within the Import Configurations page in System Management > Configurations.
Connectors: Allows a user to access connectors that the institution utilizes within System Management.	**None** = Users do not have access to the Connectors folder in System Management. **View** = Allows users to access the connector pages but not save any changes within the page. **Change** = Allows users to have access to all Connectors in the Connectors folder in System Management.

Cost Centers (Recovery Module): Allows a user to view and change costs centers within the system.	**None** = Users can not view or access the Cost Centers page in System Management. **View** = Allows users to view but not make any changes to the Cost Centers page in System Management. **Change** = Allows users to view and make changes within the Cost Centers page in System Management.
Custom Field Management: Allows a user to create custom fields that are used to extend the Temenos Infinity database. Custom fields can be used throughout the entire system.	**None** = Users can not view or access the Custom Fields page in System Management. **View** = Allows users to view but not make any changes to the Custom Fields page in System Management. **Change** = Allows users to view and make changes within the Custom Fields page in System Management.
Data Purging Allows a user to view and change the data purge settings for Temenos database tables.	**None** = Users can not view or access the Data Purging page in System Management > Data Purging. **View** = Allows users to view, but not make any changes to the Data Purging page in System Management > Data Purging. **Change** = Allows users to view and make changes within the Data Purging page in System Management > Data Purging.

Dialer Return Codes: Allows a user to view and change dialers used when the system performs actions based off the code. When an institution is using a dialer, the dialer returns a code to the system after each call.	**None** = Users can not view or access the Dialer Return Codes page in System Management > Dialers > Dialer Return codes. **View** = Allows users to view but not make any changes to the Dialer Return Codes page in System Management > Dialers > Dialer Return Codes. **Change** = Allows users to view and make changes within the Dialer Return Codes page in System Management > Dialers > Dialer Return Codes.
Emails: Allows a user to view and create email templates to be used while working a case.	**None** = Users can not view or access the Emails page in System Management > Communication > Emails. **View** = Allows users to view but not make any changes to the Emails page in System Management > Communication > Emails. **Change** = Allows users to view and make changes within the Emails page in System Management > Communication > Emails.
Exports: Allows a user to view and change export settings within System Management.	**None** = Users cannot view or access the Exports page in System Management. **View** = Allows users to view but not make any changes to the Exports page in System Management. **Change** = Allows users to view and make changes within the Exports page in System Management.

Field Configurations: Allows a user to view and change field configurations within Temenos Infinity . Changes made in field configurations apply throughout the entire system.	**None =** Users cannot view or access the Field Configurations page in System Management.. **View =** Allows users to view but not make any changes to the Field Configurations page in System Management. **Change =** Allows users to view and make changes within the Field Configurations page in System Management.
Field List Configurations: Allows a user to map values from the BANKRUPTCY_PARTY_TYPE and PARTY_TYPE lookups to up to 10 flattened Bankruptcy Party or Legal Party fields, in order to populate the data in letters, views, and/or reports.	**None** = Users cannot view or access the Field List Configurations page in System Management.. **View** = Allows users to view the Field List Configurations page in System Management, but not make any changes. **Change** = Allows users to view and make changes within the Field List Configurations page in System Management.
Genesys: Allows a user to access the Genesys application, if available for the institution. Genesys provides dialer services.	**None =** Users can not access the Genesys page. **Change =** Allows users to have access to the Genesys application.
GL Accounts (Recovery Module): Allows a user to view and change GL Accounts when using the Recovery Module. GL Accounts are used when defining the posting rules on a transaction code to determine how a new transaction is allocated on a recovery account.	**None =** Users can not view or access the GL Accounts page in System Management. **View =** Allows users to view but not make any changes to the GL Accounts page in System Management. **Change =** Allows users to view and make changes within the GL Accounts page in System Management.

Hyperlinks: Allows a user to view and change Hyperlinks in System Management. Hyperlinks can be used when working a case.	**None** = Users can not view or access the Hyperlinks page in System Management. **View** = Allows users to view but not make any changes to the Hyperlinks page in System Management. **Change** = Allows users to view and make changes within the Hyperlinks page in System Management.
Interest Rates: Allows a user to view and change Interest Rates in System Management. Interest Rates are used to determine variable rates on charged off accounts. Charged-off accounts are available in the system, but this feature only ties to those accounts if the Recovery module is active.	**None** = Users can not view or access the Interest Rates page in System Management. **View** = Allows users to view but not make any changes to the Interest Rates page in System Management. **Change** = Allows users to view and make changes within the Interest Rates page in System Management.
Letter Barcode Activation: Allows a user to activate the letter barcode process and define the location where scanned files are to be placed for the institution.	**None** = Users can not view or access the Letter Barcode Activation page in System Management > Communication > Letter Barcode Activation. **View** = Allows users to view, but not make any changes to the Letter Barcode Activation page in System. **Change** = Allows users to view and make changes within the Letter Barcode Activation page in System Management.

Letter Barcode Scanning Exceptions: Allows a user to view exception documents, as well as manually attach the documents to the applicable account or cases.	**None** = Users can not view or access the Letter Barcode Scanning Exceptions page in System Management > Communication > Letter Barcode Scanning Exceptions. **View** = Allows users to view, but not make any changes to the Letter Barcode Scanning Exceptions page in System. **Change** = Allows users to view and make changes within the Letter Barcode Scanning Exceptions page in System Management.
Letters and Forms: Allows a user to create letters and other forms to be used when working a case within the system.	**None** = Users can not view or access the Letters and Forms page in System Management > Communication > Letters and Forms. **View** = Allows users to view but not make any changes to the Letters and Forms page in System Management > Communication > Letters and Forms. **Change** = Allows users to view and make changes within the Letters and Forms page in System Management > Communication > Letters and Forms.
Merge Accounts: Allows a user to merge two accounts together. This action cannot be undone, therefore, caution should be taken when using the merge function.	**None** = Users can not view or access the Merge Accounts page in System Management. **Change** = Users can view and access the Merge Accounts page, as well as perform the Merge function.

Payment Types: Allows a user to manage the values that appear within the Payment Method drop-down in the Promise to Pay Workflow Step.	**None** = Users can not view or access the Payment Types page in System Management > Payment Types. **View** = Allows users to view but not make any changes to the Payment Types page in System Management > Payment Types. **Change** = Allows users to view and make changes within the Payment Types page in System Management > Payment Types.
Performance Groups: Allows a user to view and change performance groups in System Management. The Performance Groups page allows administrators to group users together who have similar capabilities. Data regarding their calls, contacts and promises are calculated and tracked on an individual user basis and as a whole Performance Group.	**None** = Users can not view or access the Performance Groups page in System Management > Groups > Performance Groups. **View** = Allows users to view but not make any changes to the Performance Groups page in System Management > Groups > Performance Groups. **Change** = Allows users to view and make changes within the Performance Groups page in System Management > Groups > Performance Groups.
Role Types: Allows a user to view and change Role Types in System Management.	**None** = Users can not view or access the Role Types page in System Management. **View** = Allows users to view but not make any changes to the Role Types page in System Management. **Change** = Allows users to view and make changes within the Role Types page in System Management.

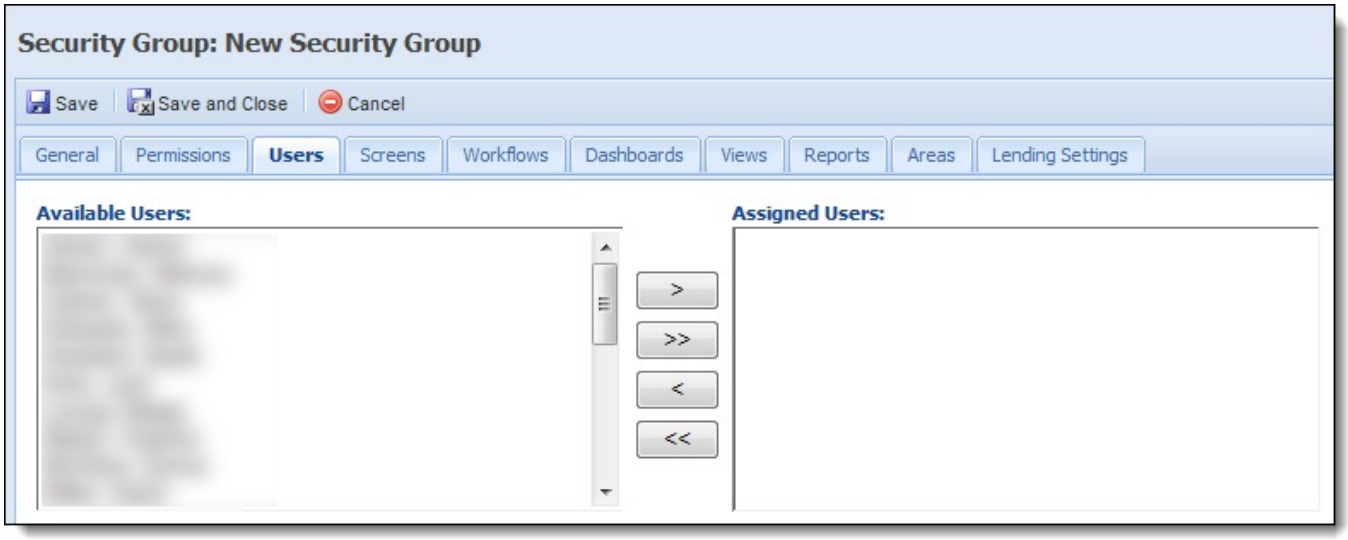
Screens: Allows a user to view and change screens in System Management. There are three categories of screens within Temenos Infinity: System-Defined, Custom and User-Defined. System-Defined screens are pre-built by Temenos to provide out-of-the-box functionality and do not require (or allow) any configuration. Custom screens are coded by the customer or by Temenos on behalf of the customer and installed on the customer's site. A User-Defined screen is created by the customer within Screens.	**None** = Users can not view or access the Screens page in System Management. **View** = Allows users to view but not make any changes to the Screens page in System Management. **Change** = Allows users to view and make changes within the Screens page in System Management.
Security Groups: Allows a user to view and change Security Groups in System Management. Security Groups are designed so that managers can set access for a group rather than every individual Temenos user.	**None** = Users can not view or access the Security Groups page in System Management > Groups > Security Groups. **View** = Allows users to view but not make any changes to the Security Groups page in System Management > Groups > Security Groups. **Change** = Allows users to view and make changes within the Security Groups page in System Management > Groups > Security Groups.
Share Types: Allows a user to view and create various share types in System Management.	**None** = Users can not view or access the Share Types page in System Management. **View** = Allows users to view but not make any changes to the Share Types page in System Management. **Change** = Allows users to view and make changes within the Share Types page in System Management.

Third Party Duplicates: Allows a user to merge and export Third Party Duplicates in System Management. The Third Party Duplicates page displays any accounts imported from a third party that match multiple accounts with the same Third Party ID.	**None** = Users can not view or access the Third Party Duplicates page in System Management **View** = Allows users to view but not make any changes to the Third Party Duplicates page in System Management. **Change** = Allows users to view and make changes within the Third Party Duplicates page in System Management.
Third Party Exceptions: Allows a user to review and resolve third party exceptions so that all third party accounts can be imported into the system. Typical third party accounts include PSCU, FICS, Certegy,and more.	**None** = Users can not view or access the Third Party Exceptions page in System Management. **View** = Allows users to view and perform functions within the Third Party Duplicates page in System Management.
Third Party Field Audit: Allows a user to track account-level changes submitted by third party companies.	**None** = Users can not view or access the Third Party Field Audit page in System Management. **View** = Allows users to view but not make any changes to the Third Party Field Audit page in System Management. **Change** = Allows users to view and make changes within the Third Party Field Audit page in System Management.
Third Party Internal Transfer Request: Allows a user to view and edit third party transfer requests.	**None** = Users can not view or access the Third Party Transfer Request page in System Management. **View** = Allows users to view but not make any changes to the Third Party Transfer Request page in System Management. **Change** = Allows users to view and make changes within the Third Party Transfer Request page in System Management.

Transaction Codes (Recovery Module): Allows a user to track payments, adjustments, and expenses on charged off accounts. Multiple transaction codes can be configured to apply funds differently to an account.	**None** = Users can not view or access the Transaction Codes page in System Management. **View** = Allows users to view but not make any changes to the Transaction Codes page in System Management. **Change** = Allows users to view and make changes within the Transaction Codes page in System Management.
Users: Allows a user to view and change existing users within the system, as well as create new users.	**None** = Users can not view or access the Users page in System Management. **View** = Allows users to view but not make any changes to the Users page in System Management. **Change** = Allows users to view and make changes within the Users page in System Management.
Workday Schedules: Allows a user to define the expected duration when working an account, due dates, holidays and more.	**None** = Users can not view or access the Workday Schedules page in System Management. **View** = Allows users to view but not make any changes to the Workday Schedules page in System Management. **Change** = Allows users to view and make changes within the Workday Schedules page in System Management.
Workflow: Allows a user to view and change workflows in System Management. Workflows are used to document what occurs within an account or case and can be configured to be as basic or as complex as the creator desires.	**None** = Users can not view or access any features in the Workflow folder in System Management. **View** = Allows users to view but not make any changes to any of the features in the Workflow folder in System Management. **Change** = Allows users to view and make changes to any features in the Workflow Folder in System Management.

Users

Within the Users tab, assign active Temenos users to be a part of the Security Group.

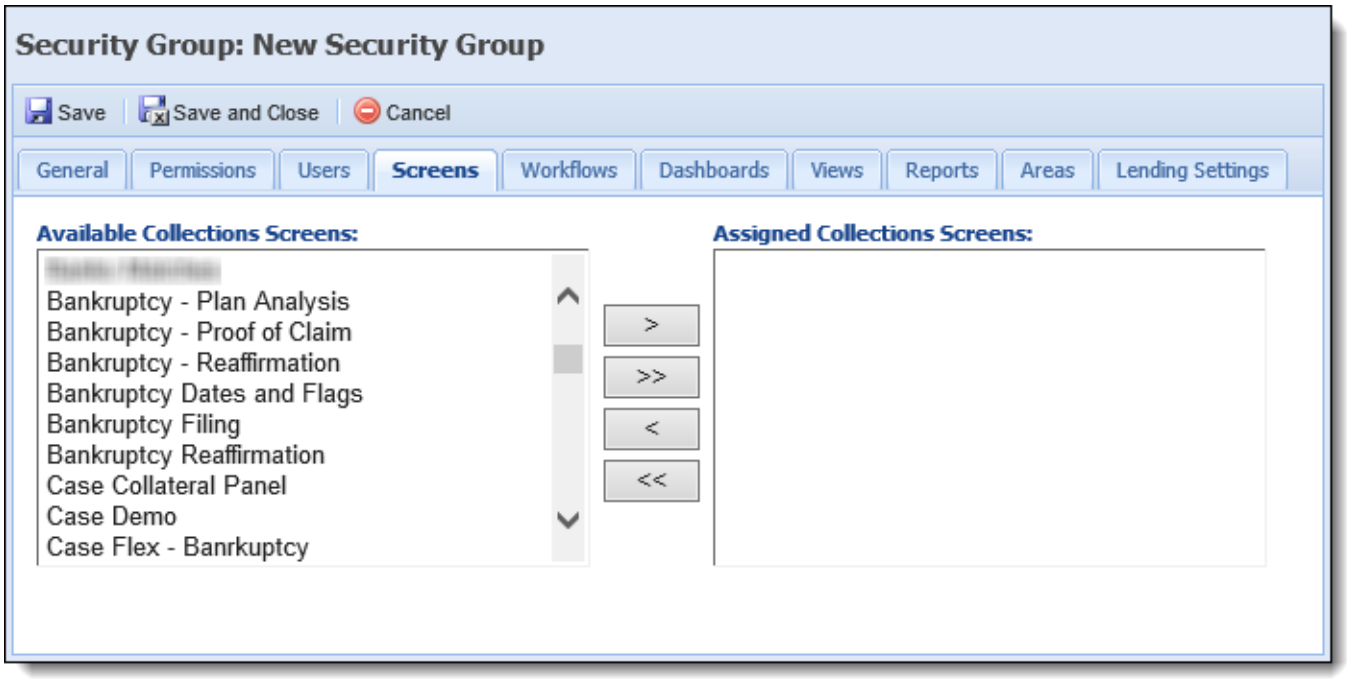


Screens

Within the Screens tab, assign available screens to the Security Group. If a screen is assigned, the users in the Security Group have access to the screen in the workspace.

> If the security group the user is assigned to has access to the screen, by default the user has access to the screen, even if they do not at the user level.

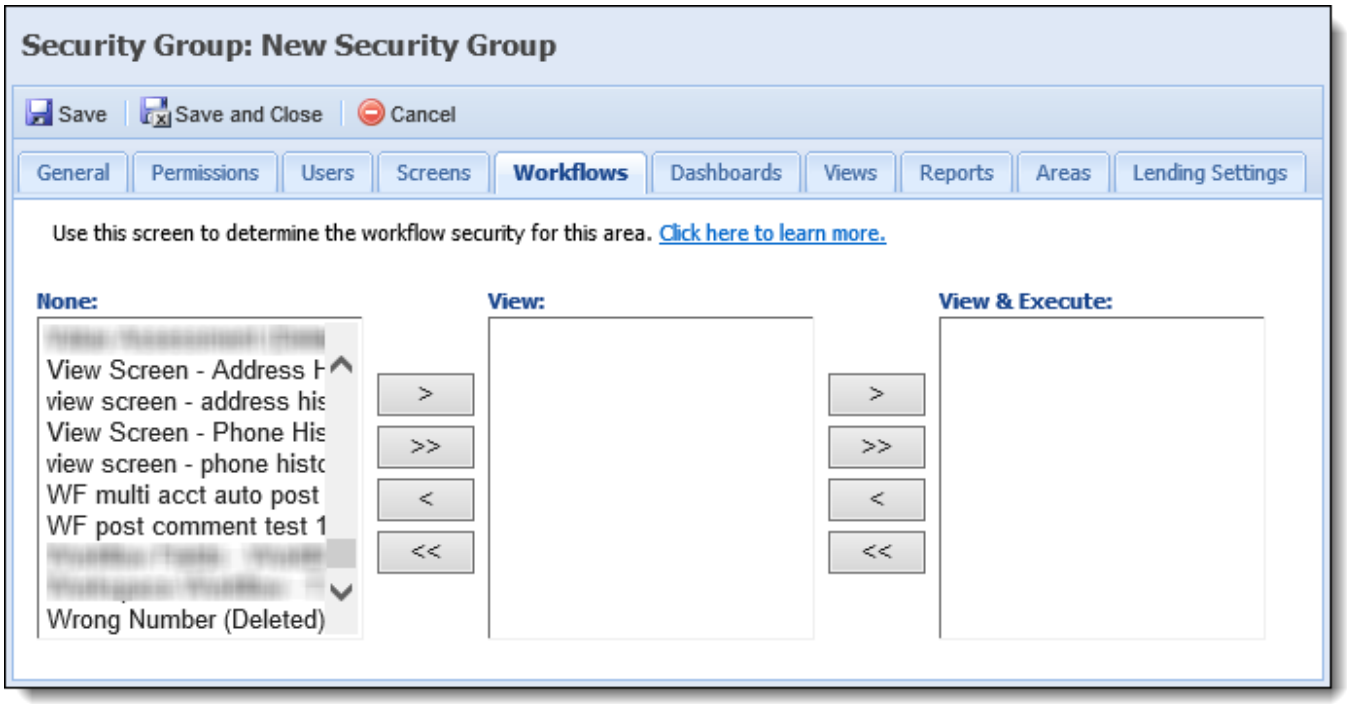
> The screens and boxes that display on the Security Group Edit screen are determined by the enabled module. For example, if loan origination is not active, lending screens are not available to be assigned and the Available and Assigned Lending boxes do not display on the Screens tab.



Workflow

Workflows can be assigned in the Workflow tab. There are three levels of access a security group can have on a workflow: None, View, or View & Execute.

None: The Security Group is not able to view the workflow history associated to the workflow nor execute the workflow.
View: The Security Group can view the workflow history associated to the workflow but cannot execute it.
View & Execute: The Security Group can view the workflow history and execute the workflow on an account, case, or person.



If the security group the user is assigned to has access to the workflow, then by default the user has access to the workflow even if they do not have permission at the user level.

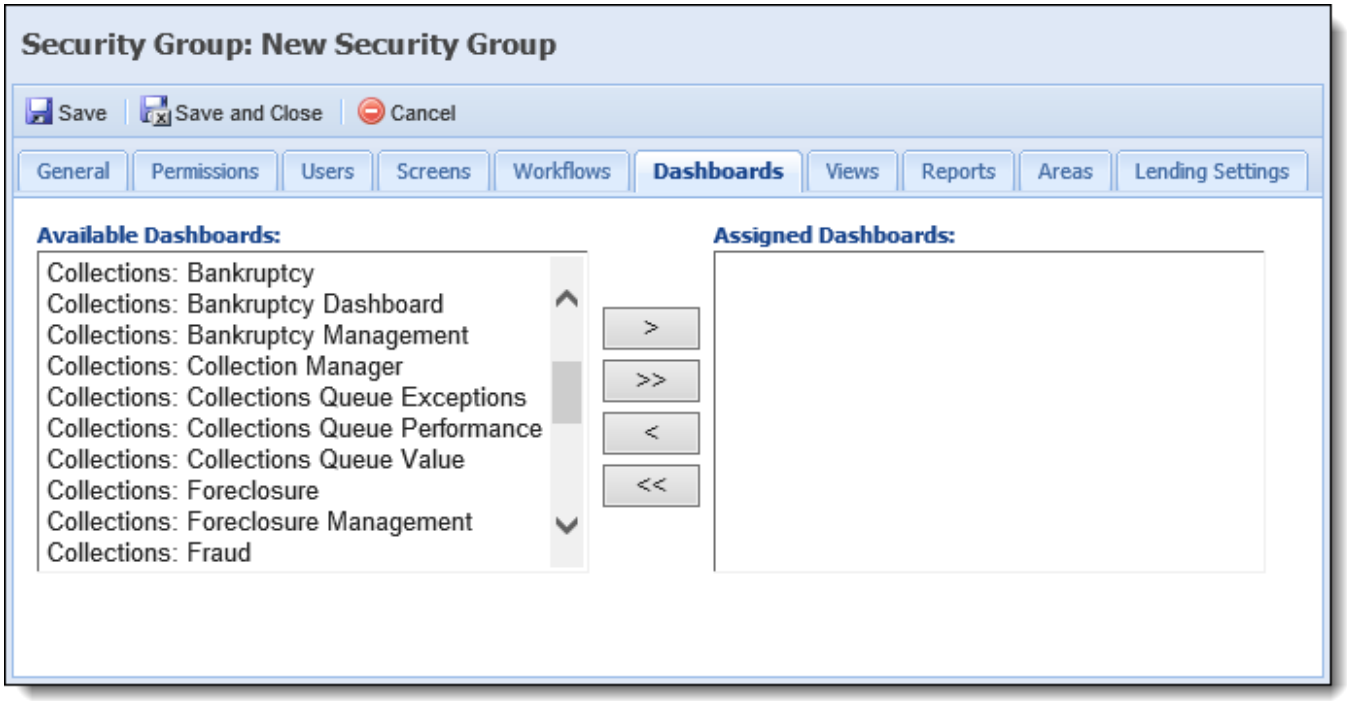
In order for a user to have access to a workflow in an Area, the following criteria must be met:

1. The workflow must be assigned to the Area.
2. The user must have direct security access to the workflow or access through a security group.
3. For each workflow, security can be set on the Area and the User or Security Group level. This security only applies when a user enters the Workspace of an Area. For example, if a workflow is not assigned to an Area, the workflow does not appear in the Area regardless of the security applied to the workflow.
4. When assigning a workflow to an Area or assigning Users and Security Groups to a workflow, there are three levels of security: None, View and View & Execute. None is the lowest level of security and View & Execute is the highest level of security.

Dashboards

On the Dashboards tab, assign available dashboards to the Security Group. If assigned, the user is able to open the dashboard from the dashboard icon in the Ribbon Bar.

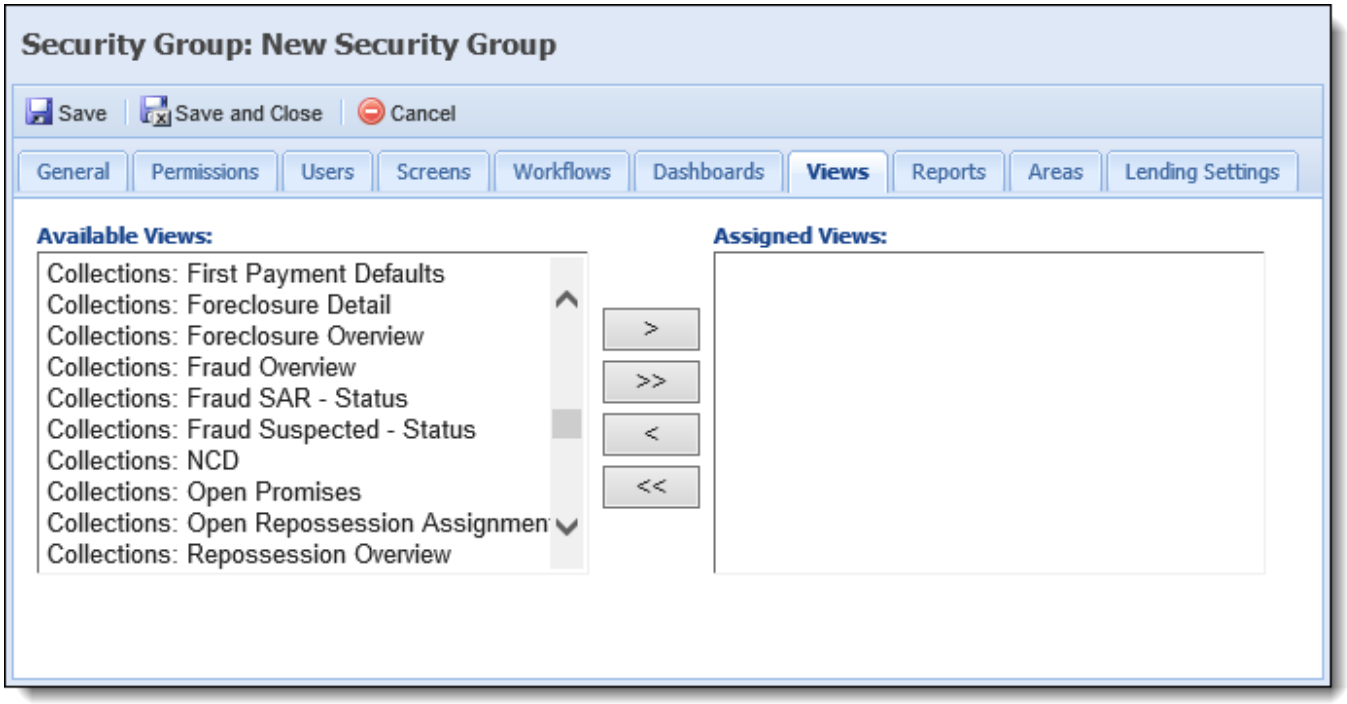
If a user has individual permission to a dashboard, by default the user has access to the dashboard even if they do not at the Security Group level.



Views

On the Views tab, assign available views to the user. If assigned, the user is able to open the view from the views icon in the Ribbon Bar.

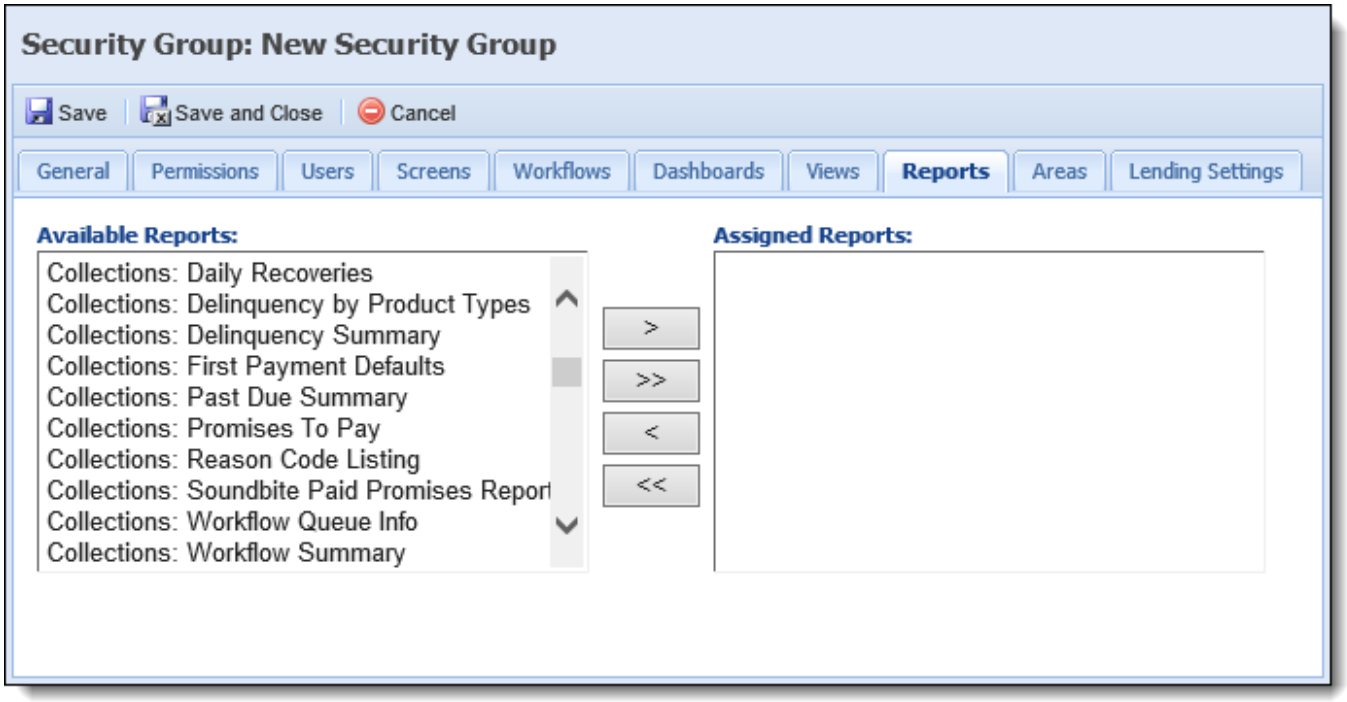
> If a user has individual permission to a View, by default the user has access to the view even if they do not at the Security Group level.



Reports

On the Reports tab, assign available reports to the Security Group. If assigned, the Security Group has the ability to view/run the reports from the reports icon in the Ribbon Bar.

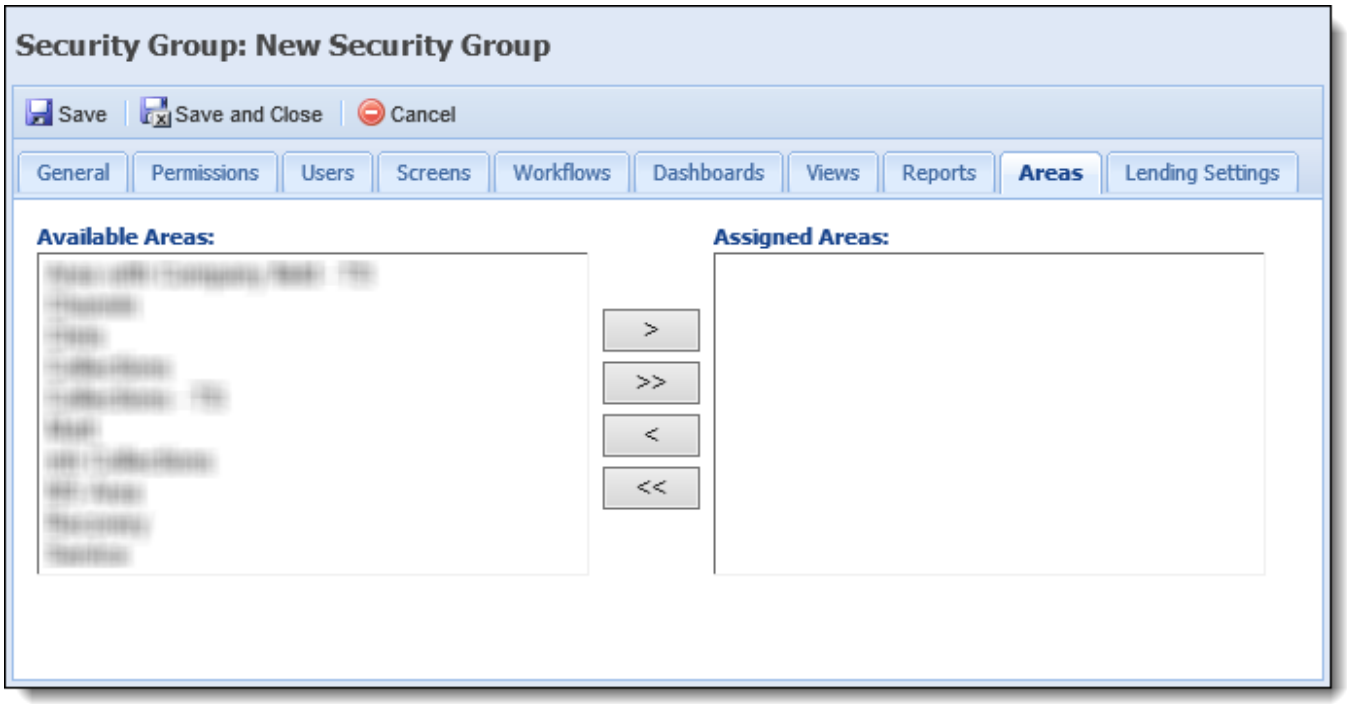
> If a user has individual permission to a Report, by default the user has access to the view even if they do not at the Security Group level.



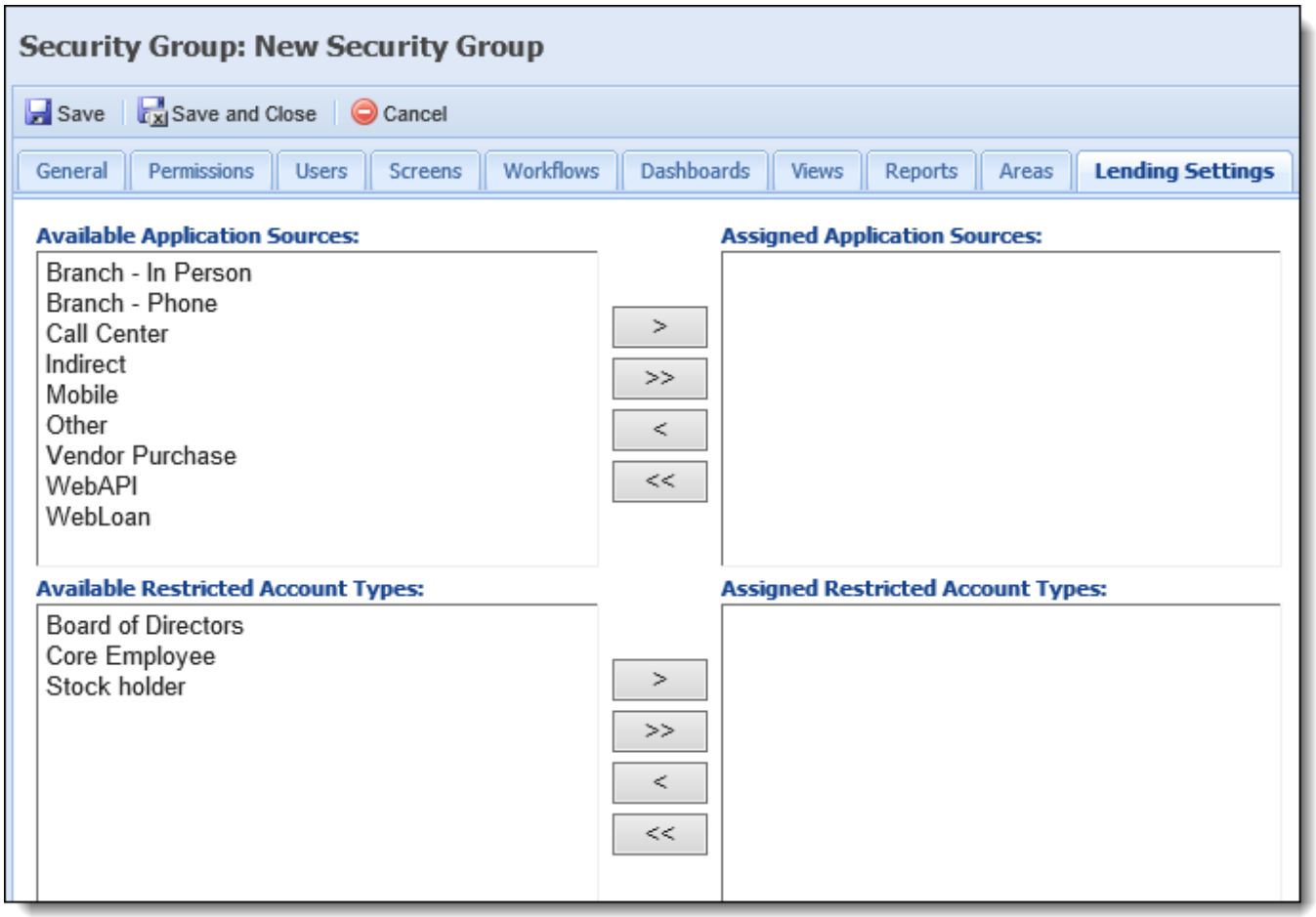
Areas

On the Areas tab, assign available areas to the Security Group. These assigned areas are available to the Security Group in the Areas drop-down in the Person workspace.

> If a user has individual permission to an area, by default, the user has access to the area even if they do not have permission at the Security Group level.



Lending Settings



Creating and Managing Security Groups

Within the Security Groups page, administrators are able to perform the following actions:

Creating a Security Group

To create a new Security Group:

- Click Create.
- The New Security Group screen appears.
- Navigate through the tabs and update the necessary attributes to the Security Group.
- When finished navigating through all of the tabs and entering in information, click Save and Close to retain the new Security Group and return to the Security Groups page. The new Security Group populates in the Security Groups page and can now be assigned to features throughout Temenos Infinity.

Copying a Security Group

To copy a Security Group:

- Select the desired Security Group in the grid.
- Click Copy. The Copy Security Group screen appears.
- Navigate through the tabs and make any required/necessary changes to the Security Group.
- When finished navigating through all of the tabs and entering in information, click Save and Close to retain the new Security Group and return to the Security Groups page. The new Security Group populates in the Security Groups page and can now be assigned to features throughout Temenos Infinity.

Editing a Security Group

To edit a Security Group:

- Select the desired Security Group in the grid.
- Click Edit. The Edit Security Group screen appears.
- Navigate through the tabs and make any necessary changes to the Security Group.
- When finished navigating through all of the tabs and entering in information, click Save and Close to retain the Security Group and return to the Security Groups page.

Deleting a Security Group

To delete a Security Group:

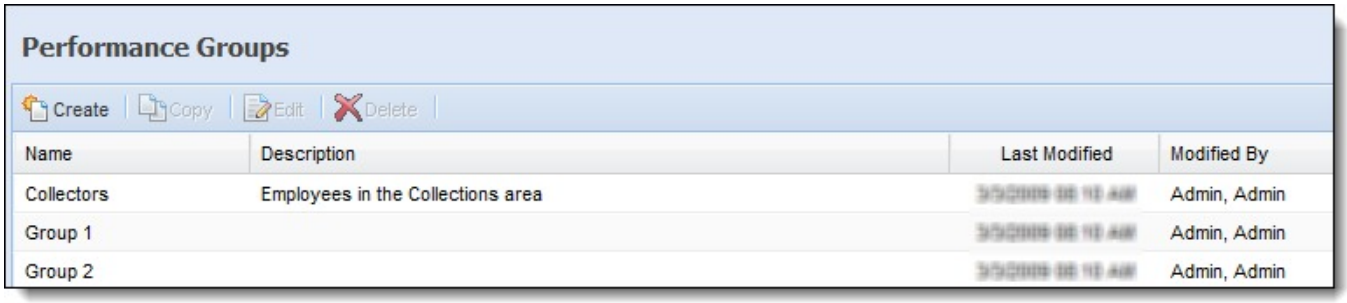
- Select the desired Security Group in the grid.
- Click Delete.
- A confirmation message appears. Click **Yes** to delete the security group. Click **No** to return to the Security Groups page without deleting.

Performance Reporting

Performance Groups

Performance Groups allow administrators to group users together who have similar capabilities. Data regarding their calls, contacts and promises are calculated and tracked on an individual user basis and as a whole Performance Group.

The System Management > Groups > Performance Groups page displays an alphabetical list of all performance groups in Temenos Infinity.



The following columns display in the Performance Group page:

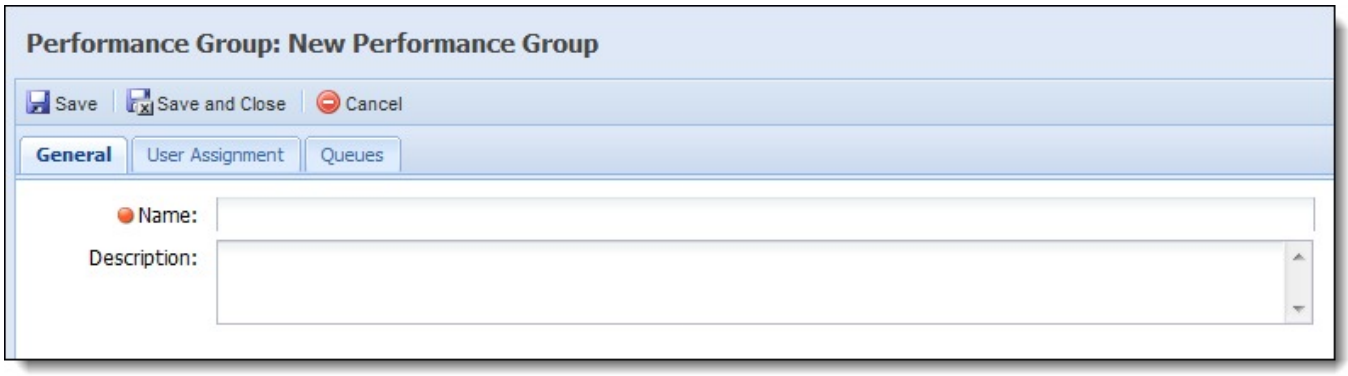
Column Name	Description
Name	The name of the Performance Group.
Description	A description of the Performance Group.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification.

The performance information can be tracked on the User Performance dashboard web part.

Performance Group Attributes

All performance groups share common attributes that are defined while creating, copying, or editing a performance group.

General



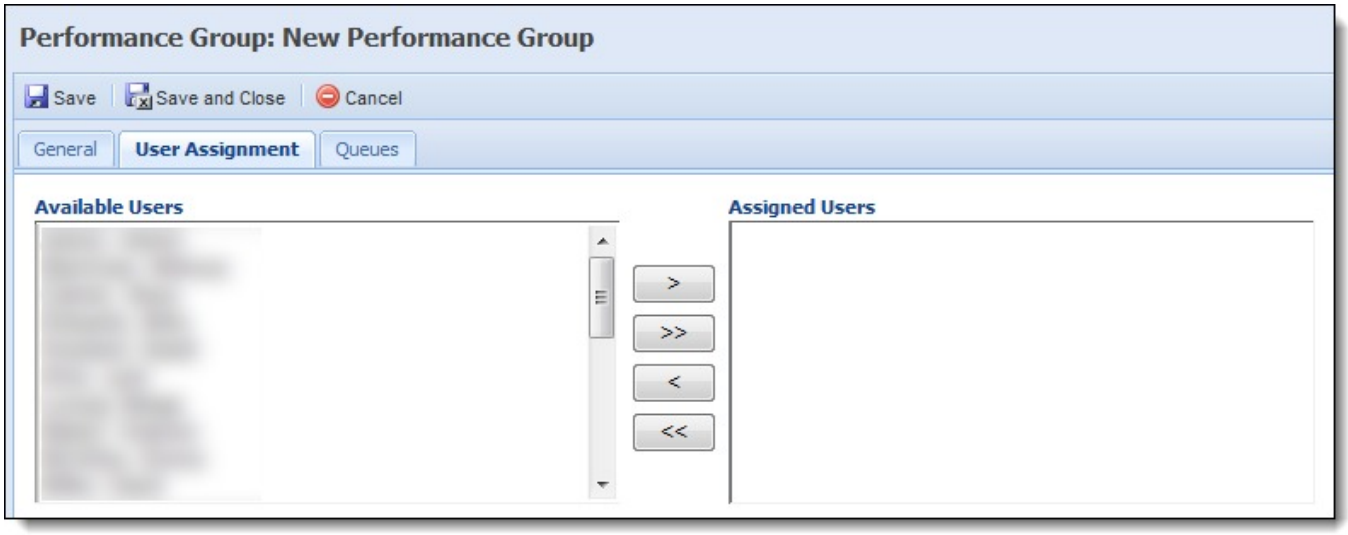
General attributes are located on the General tab:

Attribute	Description
Name	Provide a name for the Performance Group. This is a required field.
Description	Provide details about the Performance Group.

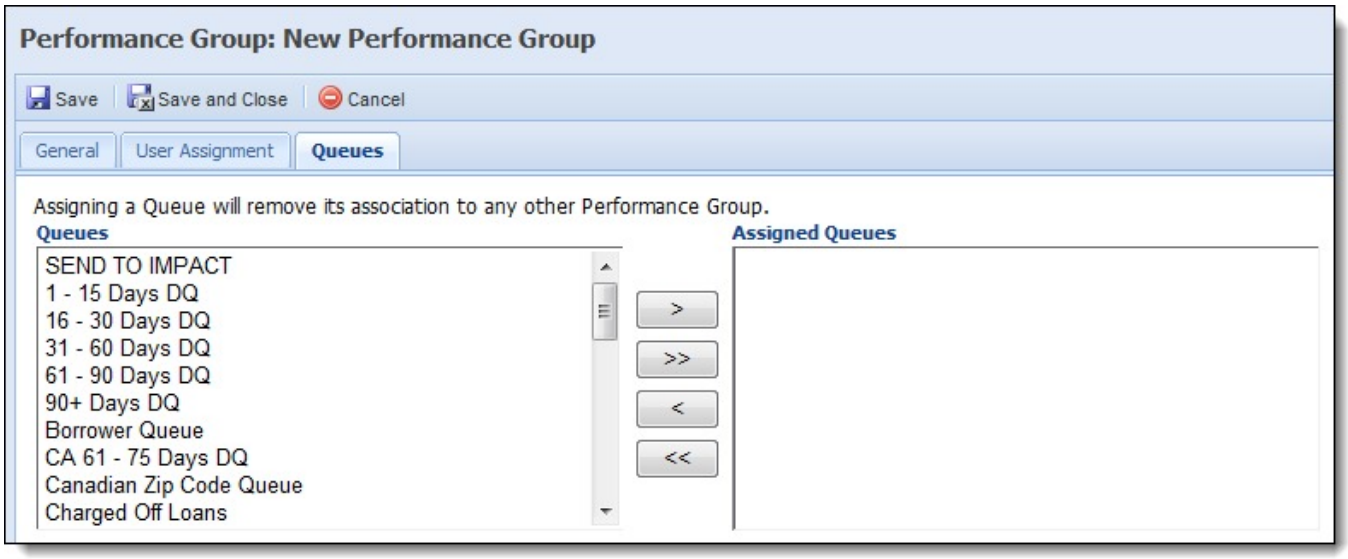
User Assignment

Navigate to the User Assignment tab. In this tab, assign individual users to be a part of the new Performance Group.

A user can be a part of more than one performance group.



Queues



Performance group are assigned to queues in the Queues tab. Collection statistics, as it pertains to the queues assigned, can be reported on by system administrators.

Assigning a Queue to a performance group removes the queue's association to any other Performance Group.

Creating a Performance Group

- Click **Create** above the list area.
- The new Performance Group screen appears.
- Navigate through the tabs and update the neccessary attributes.
- When finished, click **Save** or **Save and Close** to save the Performance Group and return to the Performance Groups page. The new Performance Group populates in the performance group page and can be used in reports and dashboards. Click **Cancel** to return without saving.

Copying a Performance Group

- Select a Performance Group to highlight it.

- Click **Copy.**
- The Copy Performance Group screen appears. Navigate through the tabs and make any changes.
- Click **Save** or **Save and Close** to save the Performance Group and return to the Performance Groups page. The new Performance Group populates in the performance group page. Click **Cancel** to return without saving.

Editing a Performance Group

- Select a Performance Group to highlight it.
- Click **Edit.**
- The Edit Performance Group screen appears. Navigate through the tabs and make any necessary changes.
- When finished, click **Save** or **Save and Close** to save the Performance Group and return to the Performance Groups page.
- Click **Cancel** to return without saving.

Deleting a Performance Group

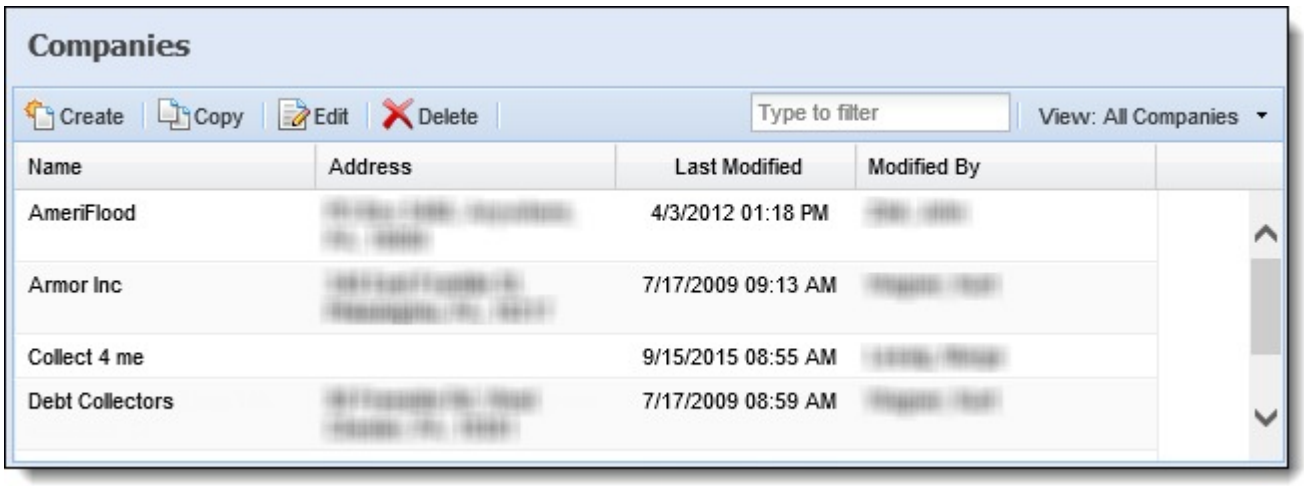
- Click to highlight the Performance Group that is to be deleted.
- Click **Delete**.
- A confirmation message appears. Click **Yes** to delete the Performance Group. Click **No** to not delete the Performance Group and return to the Performance Groups page.

Address Book

Companies

The Companies page allows administrators to create and manage Third Party Companies and associated Contacts within those companies used in working Accounts, and Cases. Administrators can associate companies to specific accounts from the Contacts page in System Management.

The following columns display in the System Management > Address Book > Companies screen:



Column Name	Description
Name	Displays the name of the company.
Address	Displays the address of the company.
Last Modified	Denotes when the last modification was made.

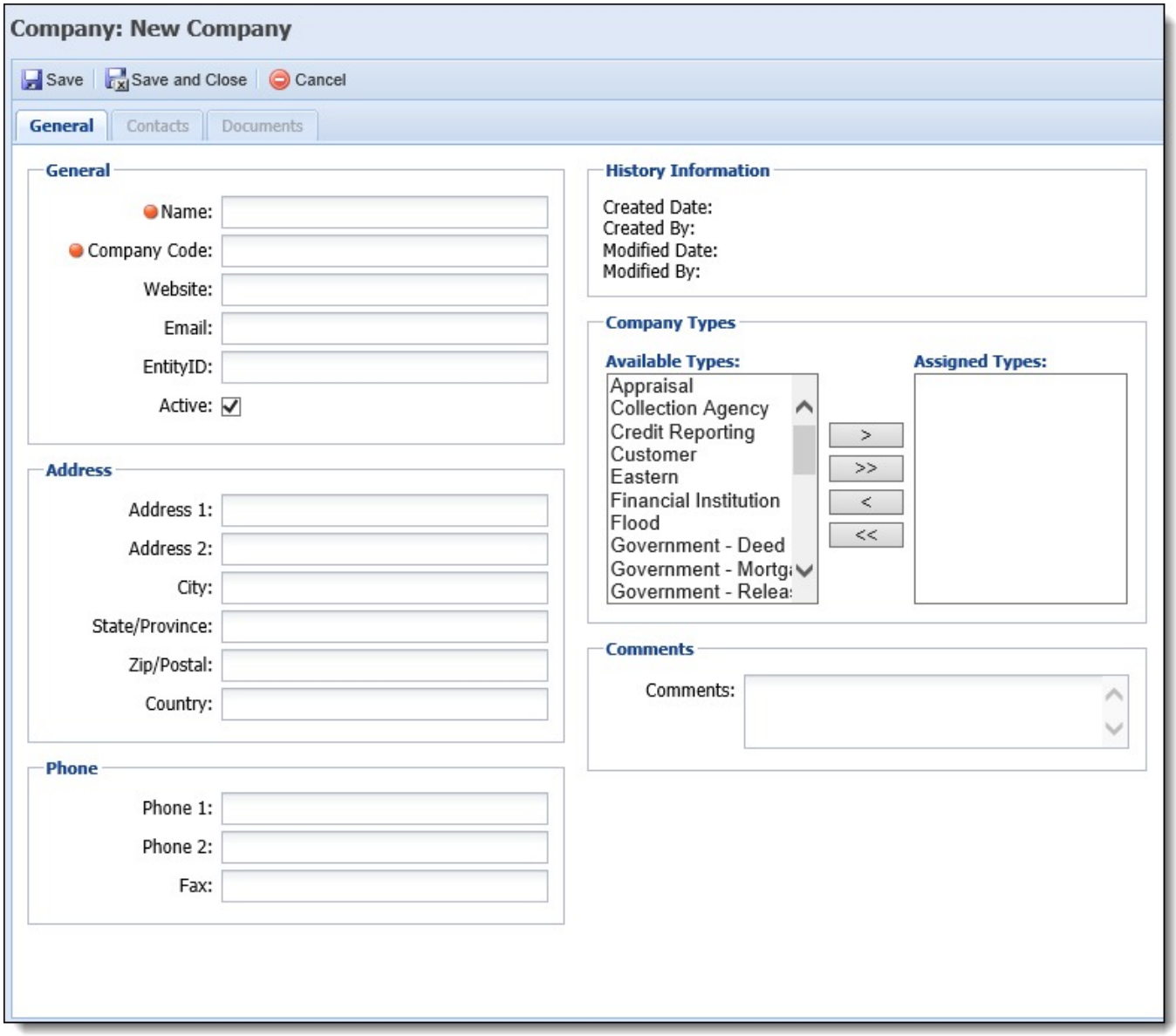
Modified By	Denotes who made the last modification.

Company Attributes

All companies share common attributes that are defined while creating, copying, or editing a company.

General

General attributes are separated into six categories, General, Address, Phone, History Information, Company Types, and Comments, all of which are assigned on the General tab.



The following Company attributes can be assigned within the General tab:

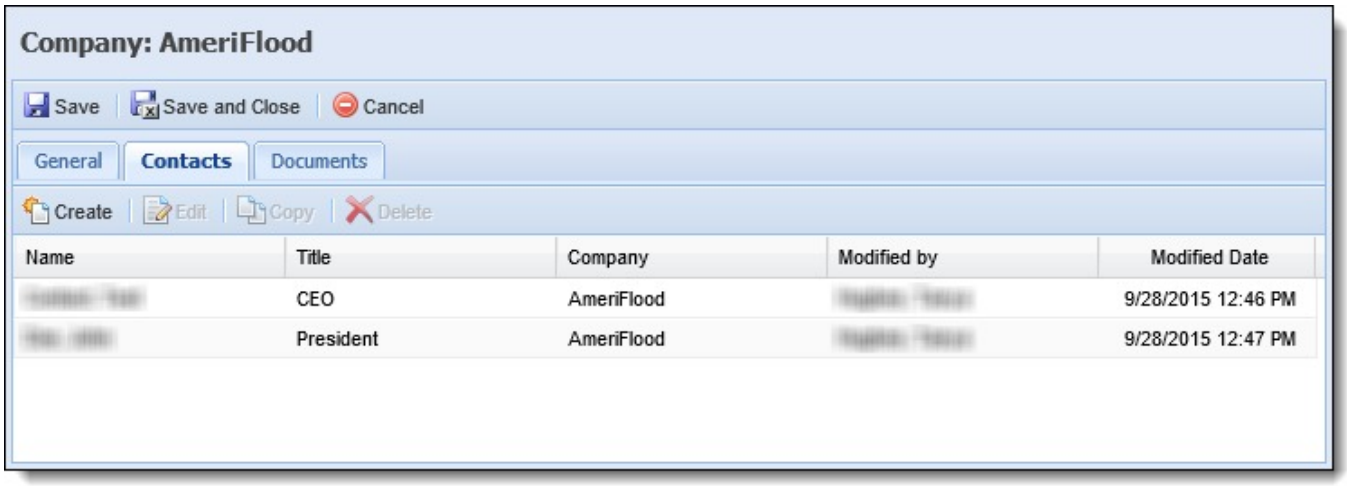
Attribute Category	Description

General	There are six general attributes that can be associated with a company. • Name: Enter the name of the company. This is a required field. • Company Code: Enter a code for the company. This is a required field. • Website: If applicable, enter the company website. • Email: If applicable, enter an email address for the company. • EntityID: If applicable, enter the entity ID. • Active: Select the active check box if this company is currently an active Third party.
Address	Provide the company address.
Phone	Provide the company phone and fax numbers.
History Information	A read-only attribute that displays the Created Date, who the company was Created By, the last Modified Date, and who it was Modified By.
Company Types	Select a company type from the Available Types list and move it to the Assigned Types list to assign it to the company. The list of available Company Types are controlled by the Company_Type lookup field in System Management > Field Configurations.
Comments	Enter comments about the company within the Comments textbox.

The Contacts and Documents tabs are not enabled until the General tab is completed and the company is saved.

Contacts

The Contacts attribute allows administrators to associate specific individual contacts to the company.



The following columns display in the contacts tab:

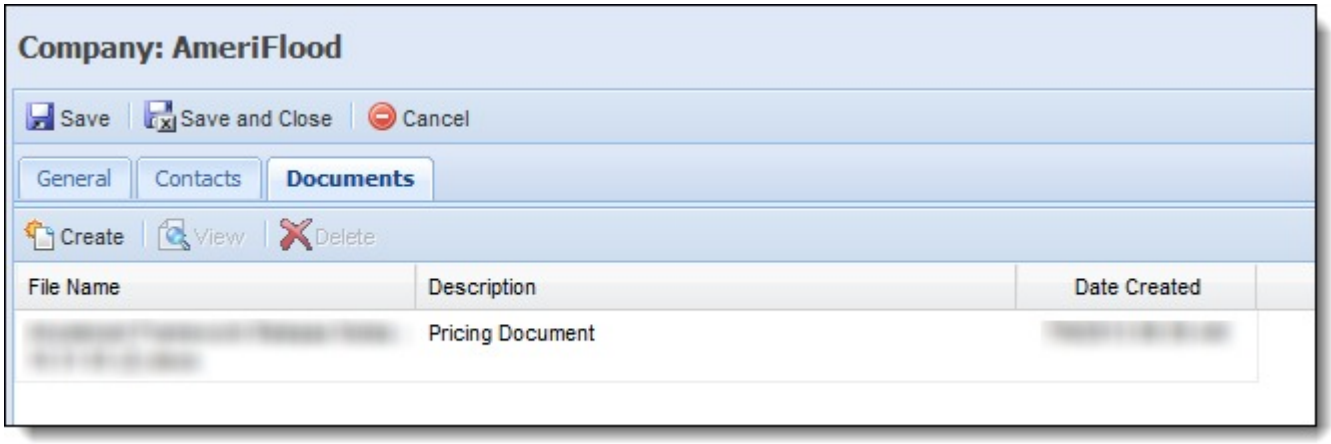
Column Name	Description
Name	Displays the name of the contact.
Title	Displays the job title as it pertains to the company.

Company	Displays the name of the company.
Modified By	Denotes who made the last modification to the contact.
Modified Date	Denotes when the last modification was made.

Administrators can create new contacts, edit new contacts, copy existing contacts and delete contacts within this tab. For more information about contact attributes, see the Contacts topic in this guide.

Documents

The Documents attribute allows administrators to upload and manage documents associated to the company. From this tab, administrators can create new documents, view existing documents, and delete documents.



The following columns display within the Documents tab:

Attribute	Description
File Name	Displays the file name of the document.
Description	Displays a brief description of the document.
Date Created	Displays the date in which the document was uploaded.

Creating and Managing Companies

From the Companies page, administrators can create a company, copy an existing company, edit an existing company, and delete companies.

Creating a Company

To create a new company:

- Click **Create**.
- The New Company screen appears.
- Navigate through the tabs and update the necessary attributes.
- When finished, click **Save** or **Save and Close** to save the new company and return to the Companies page. The new company populates in the companies list. Click **Cancel** to return without saving. The company can now be associated to an account/person from their Contacts screen.

Copying a Company

To copy a company:

- Highlight the desired company within the grid and click **Copy**.
- The Copy Company screen appears.
- Navigate through the tabs and make any required/necessary updates to the attributes.
- When finished, click **Save** or **Save and Close** to save the new company and return to the Companies page. The new company populates in the companies list. Click **Cancel** to return without saving. The company can now be associated to an account/person from their Contacts screen.

Editing a Company

To edit a company:

- Highlight the desired company within the grid and click **Edit**.
- The Edit Company screen appears.
- Navigate through the tabs and make any necessary changes.
- When finished, click **Save** or **Save and Close** to save the company and return to the Companies page. Click **Cancel** to return without saving.

Deleting a Company

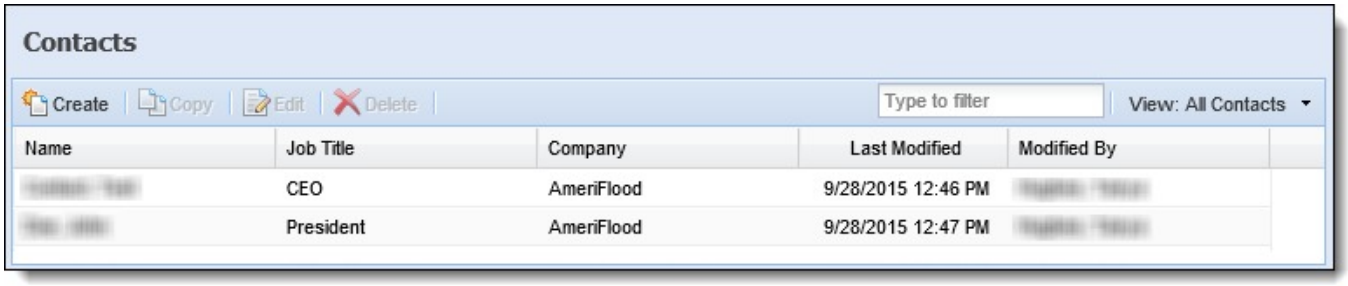
To delete a company:

- Highlight the desired company within the grid and click **Delete**.
- A confirmation message appears.
- Click **Yes** to delete the company. Click **No** to return to the Companies page without deleting.

Contacts

Contacts allows administrators to create and maintain contacts that have been configured for the institution. Administrators can associate these contacts to specific people and companies from the System Management > Address Book > Contacts page.

> Contacts can also be created in Address Book > Companies. See the Companies topic in this guide for more information.



The following columns display on the Contacts page:

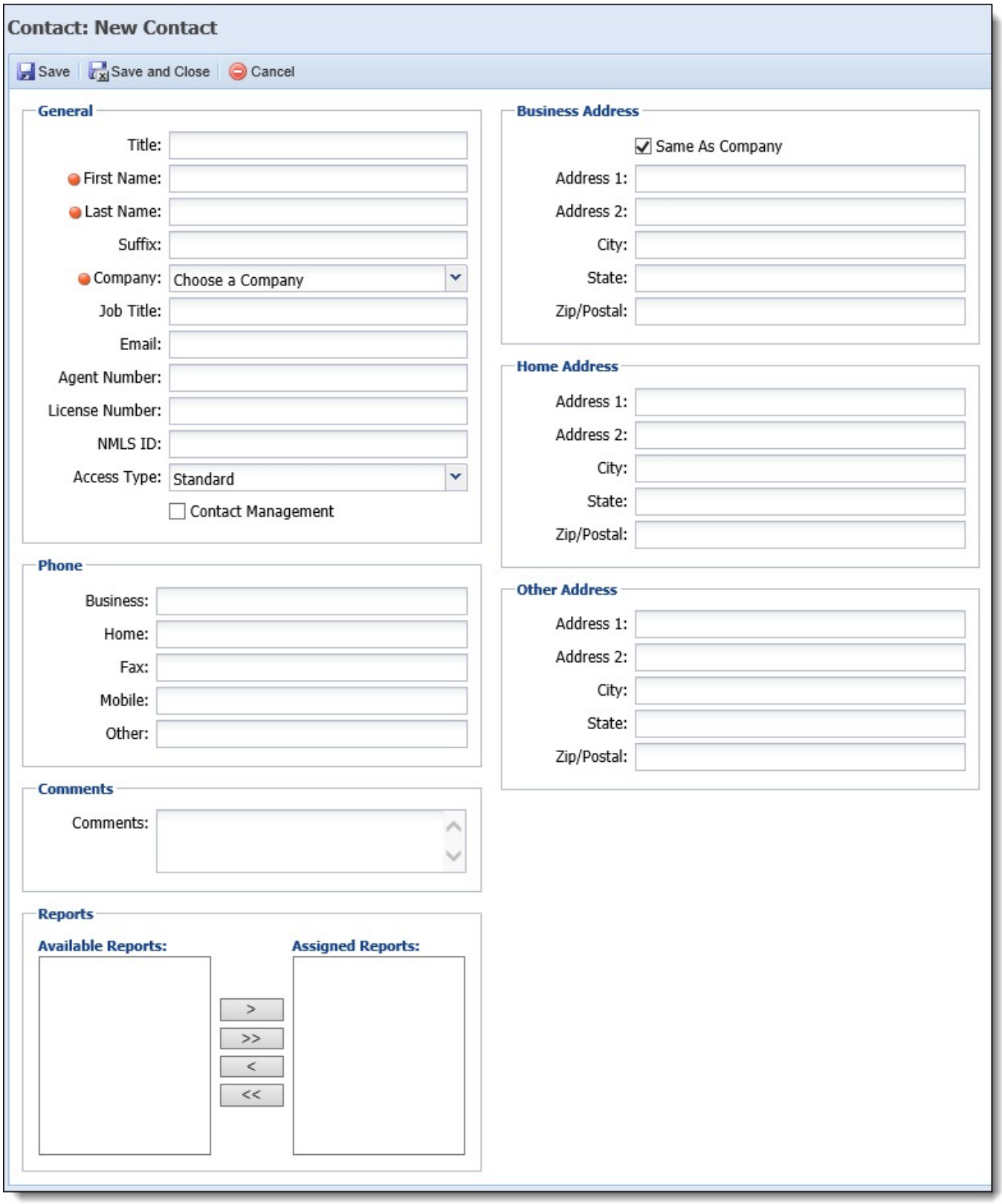
Column Name	Description
Name	Displays the name of the contact.
Title	Displays the job title as it pertains to the company with which the contact is associated.
Company	Displays the name of the company with which the contact is associated.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification for the contact.

Contact Attributes

All contacts share common attributes that are defined while creating, copying or editing a contact.

General

General attributes are separated into six categories, General, Phone, Comments, Business Address, Home Address and Other Address, all of which are assigned on the General tab.



The following Contact attributes can be assigned within the General tab:

Attribute	Description

<table>
<tr><td>General</td><td>The general contact information includes seven fields:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Title</td><td>Includes a title for the contact.</td></tr>
<tr><td>First Name</td><td>Provide the first name of the contact. This is a required field.</td></tr>
<tr><td>Last Name</td><td>Provide the last name of the contact. This is a required field.</td></tr>
<tr><td>Suffix</td><td>Includes a suffix in the name of the contact.</td></tr>
<tr><td>Company</td><td>Select a company from the drop-down to associate with the contact. This is a required field.</td></tr>
<tr><td>Job Title</td><td>Includes a job title for the contact.</td></tr>
<tr><td>Email</td><td>Includes an email address for the contact.</td></tr>
<tr><td>Agent Number</td><td>Provide the agent number of the contact.</td></tr>
<tr><td>License Number</td><td>Provide the license number of the contact.</td></tr>
<tr><td>NMLS ID</td><td>Provide the NMLS ID of the contact.</td></tr>
</table></td></tr>
<tr><td>Phone</td><td>Enter any or all of the contact's Business, Home, Fax, Mobile and Other numbers.</td></tr>
<tr><td>Comments</td><td>Enter comments for the contact.</td></tr>
<tr><td>Business Address</td><td>Enter a business address for the contact.</td></tr>
<tr><td>Home Address</td><td>Enter a home address for the contact.</td></tr>
<tr><td>Other Address</td><td>Enter any other address for the contact.</td></tr>
</table>

Creating and Managing Contacts

From the Contacts page, administrators can create a contact, copy an existing contact, edit an existing contact and delete contacts.

Creating a Contact

To create a contact:

- Click **Create.**
- The New Contact screen appears.
- Navigate through the categories and enter all information for the attributes.
- Click **Save** or **Save and Close** to save and return to the Contacts page. The contact now appears in the contacts list. Click **Cancel** to return to the Contacts page without saving. The contact can now be associated to an account/person from their Contacts screen.

Copying a Contact

To copy a contact:

- Highlight the desired contact within the grid and click **Copy**.
- The Copy Contact screen appears.
- Make any required/necessary changes to the contact.
- When finished, click **Save** or **Save and Close** to save and return to the Contacts page. The contact now

appears in the contacts list. Click **Cancel** to return to the Contacts page without saving. The contact can now be associated to an account/person from their Contacts screen.

Editing a Contact

To edit a contact:

- Highlight the desired contact within the grid and click **Edit**.
- The Edit Contact screen appears.
- Make any necessary changes to the contact.
- When finished, click **Save** or **Save and Close** to save and return to the Contacts page. Click **Cancel** to return to the Contacts page without saving.

Deleting a Contact

To delete a contact:

- Highlight the desired contact within the grid and click **Delete**.
- A confirmation message appears.
- Click **Yes** to delete the contact. Click **No** to return to the Contacts page without deleting.

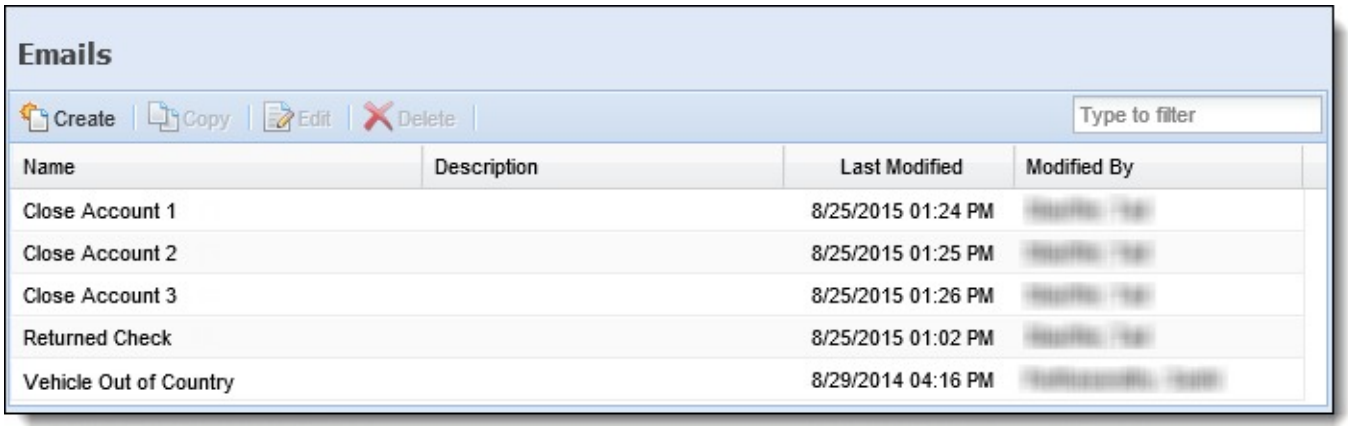
Communication

Emails

The Emails pagein System Management (System Management >Communication > Emails) allows administrators to manage email templates within Temenos Infinity. The emails listed on the Emails page can be incorporated into the Send Email workflow step by the system administrator and run by users when working persons or accounts.

> For more information on the configuration of the Send Email workflow step, please see the Send Email Workflow Step topic in this guide.

> To see the Emails functionality in action for account recipients, view the Creating Emails video tutorial.



The grid on this page displays the following columns of information for each email:

Column Name	Description
Name	Displays the name of the email template.
Description	Displays a description of the email template.

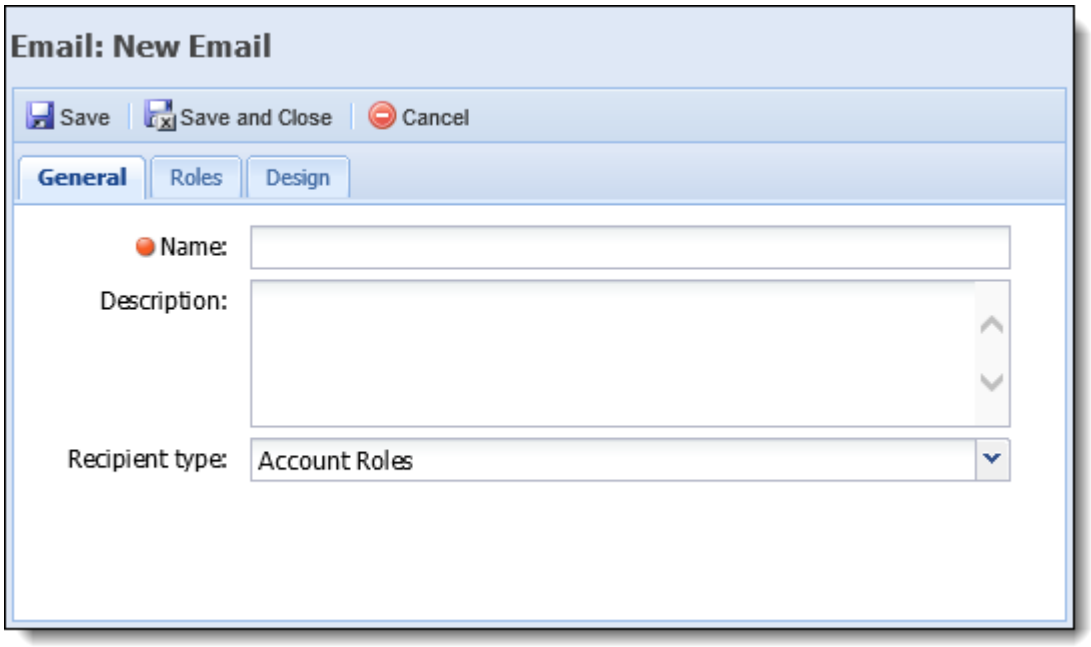
Last Modified	Denotes when the last modification to the email was made.
Modified By	Denotes who made the last modification to the email.

From the Emails page, administrators can create new email templates, copy existing templates, edit existing templates, and delete templates.

Email Attributes

All emails share common attributes that are defined when creating, copying, or editing email templates.

General



The following attributes are defined within the General tab:

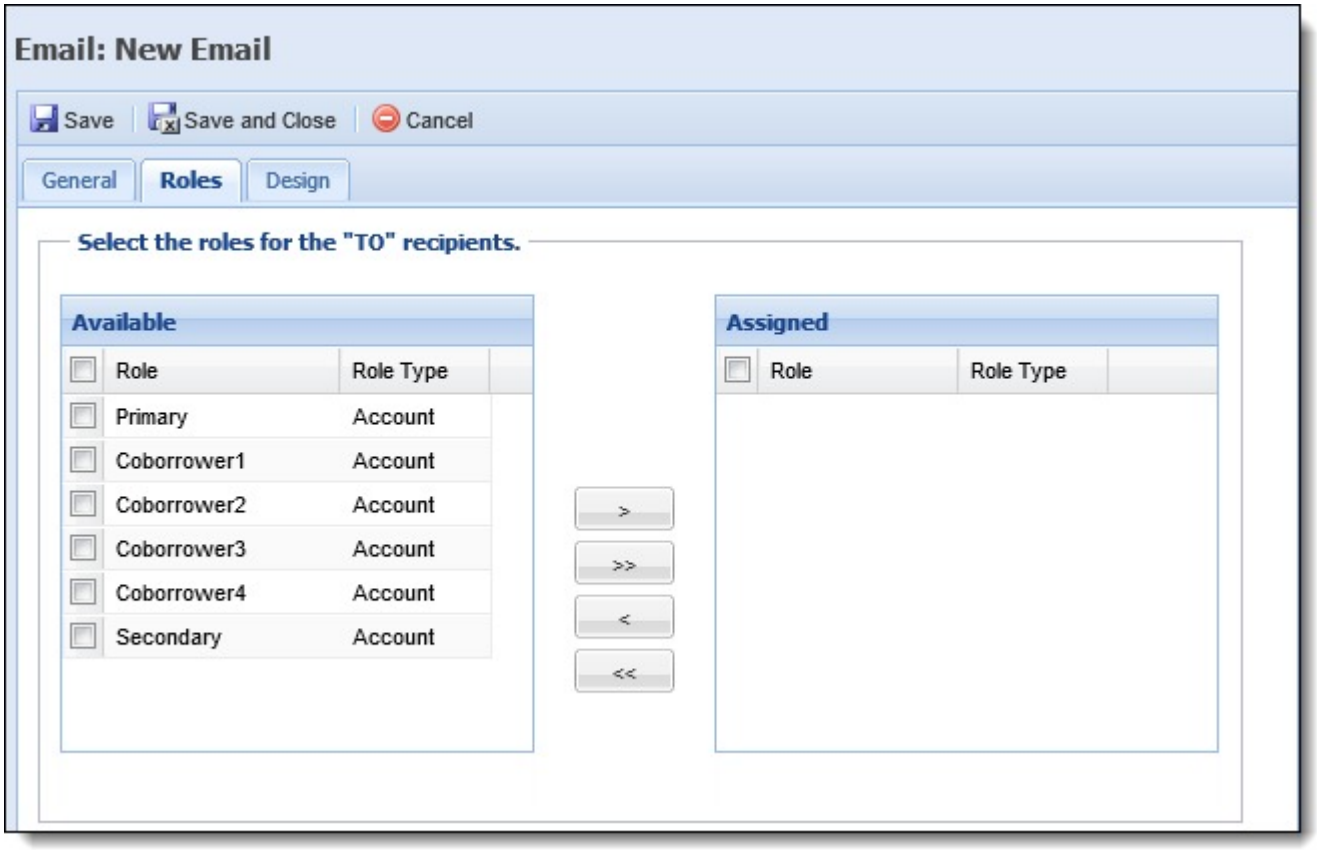
Attribute	Description
Name	Enter a name for the email template. This is the name that appears when incorporating the email into a Send Email workflow step. This is a required field.
Description	If desired, enter a description to provide more information for the email template.

Recipient Type	Select an option to identify the type of recipient to receive the email, such as Account Roles or Contact Roles. The selection made within this drop-down determines which roles are available to assign to an email. For example, when Account Roles is selected as the recipient type, all of the account roles configured in System Management > Role Types are available to assign within the “TO” box in the Roles tab. All of the Contact Roles configured for the CONTACT_RELATIONSHIP lookup in System Management > Field Configurations are available to assign within the “CC” box in the Roles tab. Contact roles are based off the contacts associated to the person in their contacts screen. Contacts are managed in System Management > Address Book.

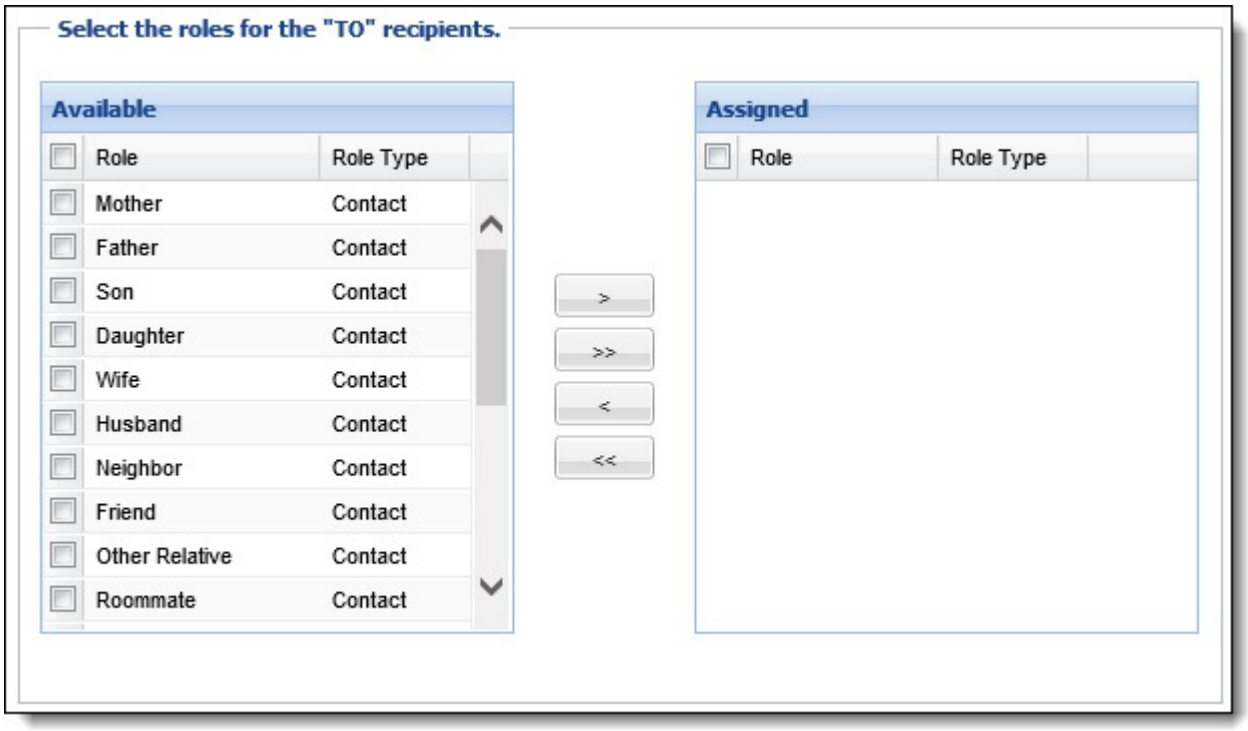
Roles

Role attributes are used to define which roles are to receive the email. The Recipient Type option that is selected in the General tab determines the roles that are available in both the “TO” recipients and "CC" recipients sections.

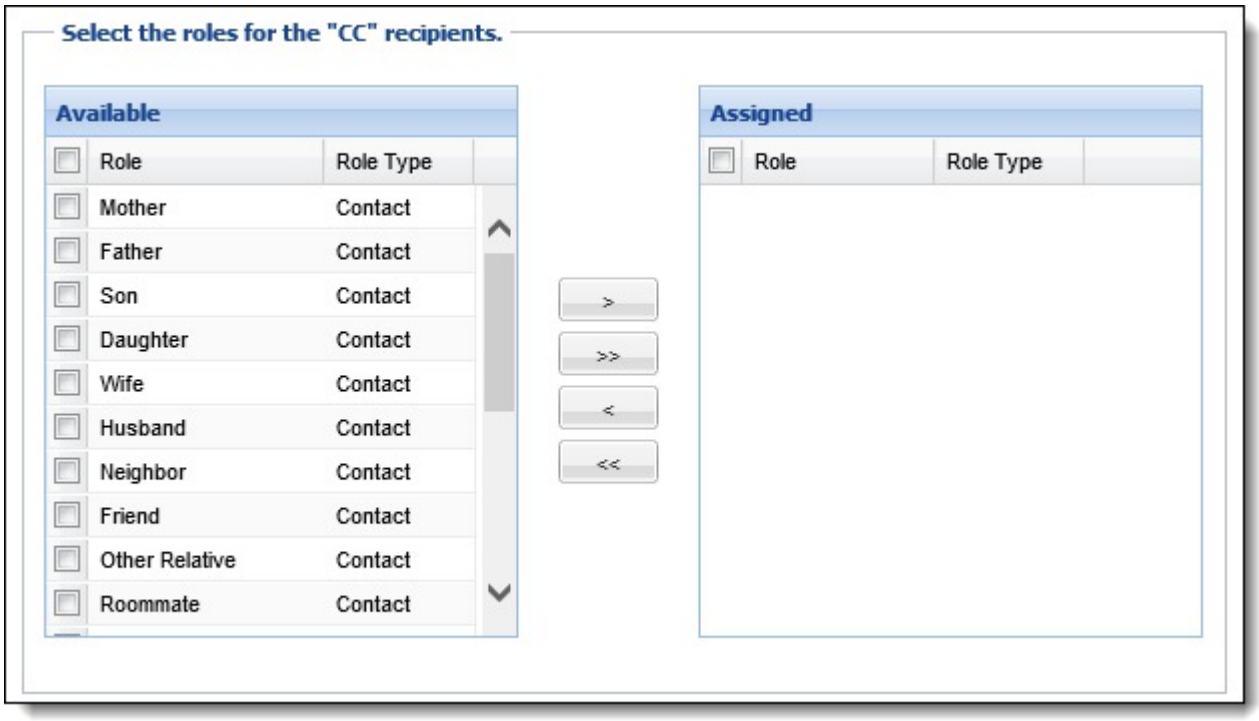
When Account Roles is selected within the Recipient type drop-down, the Available box in the "TO" section displays a list of the account roles configured in System Management > Role Types as shown below:



When Contact Roles is selected as the Recipient type, a list of the configured values for the CONTACT_RELATIONSHIP lookup in System Management > Field Configurations is displayed within the "To" section.



Regardless of the Recipient Type selected, the “CC” section displays the available Contact roles configured for the CONTACT_RELATIONSHIP lookup.



The following role attributes are assigned within the Roles tab:

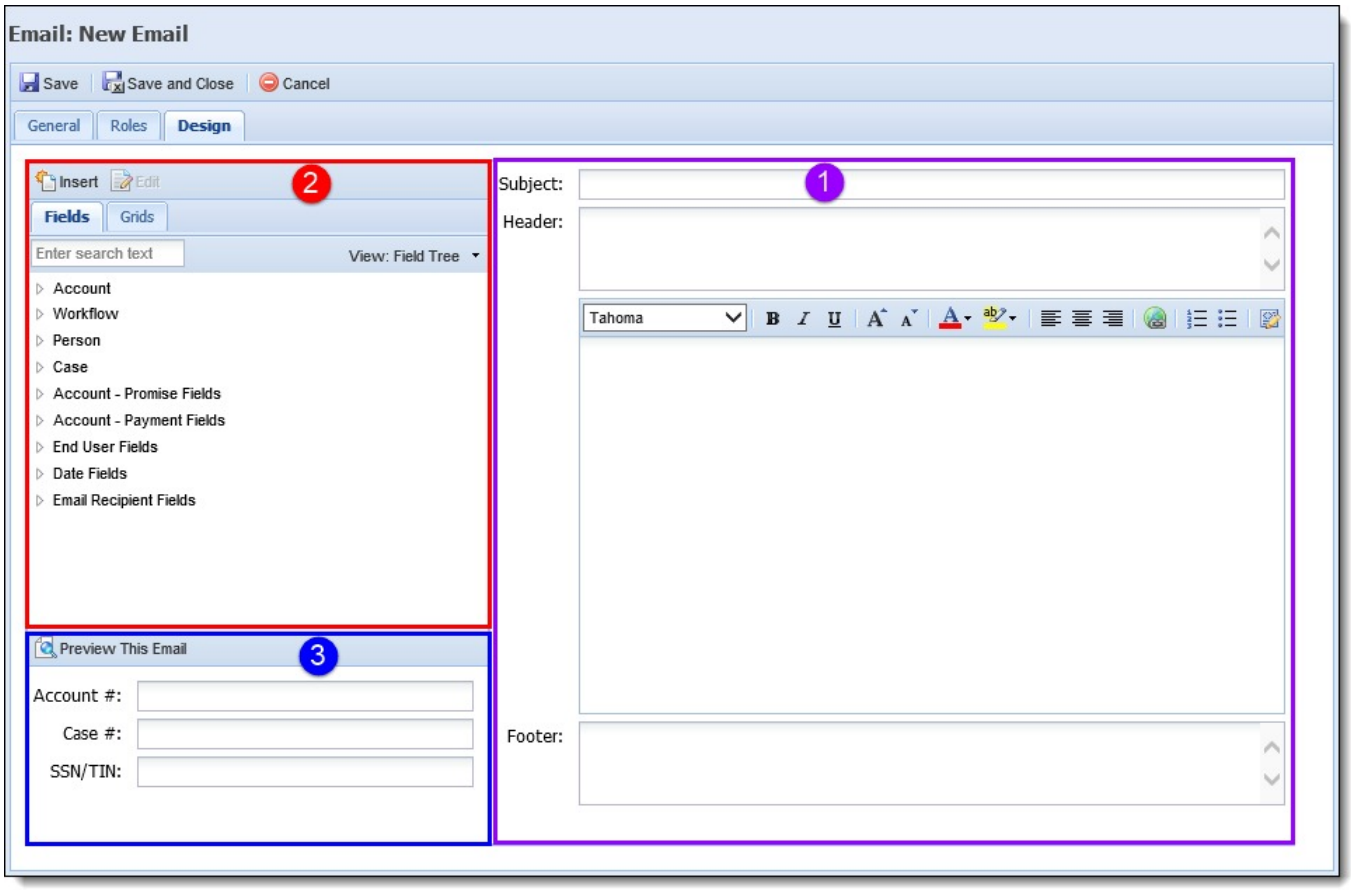
> If Administrator and Primary are assigned as recipients of the email in the “TO” section, and the same person has both of these roles on the account, the person receives one email. If Primary was assigned to the “CC” section, the person still receives one email with all of the information in it.

Attribute	Description

Roles for "To" recipients	
Available	Displays a list of the roles available to assign as primary recipients of the email. Select the desired role(s) from the Available list and move them to the Assigned list by dragging and dropping the desired role or using the arrows that display.
Assigned	Displays the roles for which the email is to be generated.
Roles for "CC" recipients	
Available	Displays a list of the roles available to assign as secondary recipients of the email. Select the desired role(s) from the Available list and move them to the Assigned list by dragging and dropping the desired role or using the arrows that display.
Assigned	Displays the roles that are carbon copied on the email when generated.

Design

Design attributes are defined within the Design tab. This tab provides administrators with the ability to customize the email template as well as preview the email before it is generated.



The Design tab consists of the following sections:

1 - Email Body

The Email Body section allows administrators to define the content that is included in the email template. Within this section, administrators are able to configure the following attributes:

Attribute	Description

Subject	Enter the subject to be displayed when the email is generated.
Header	Enter the header to appear in the email to identify specific information about the email or highlight the purpose of the email.
Body	Enter the message to appear within the email template. This section consists of the email text as well as any desired fields and/or grids.
Footer	Enter the footer to appear in the email to include any institution specific information and/or links within the bottom of the email message.

> Administrators can configure a default header and footer to automatically appear in emails within the Email Settings tab in System Management > Modules > Collection. If a header and/or footer is set within the Design tab, it automatically overwrites the default header and footer configured by the administrator.

2 - Fields/Grids

The left panel of the design tab enables administrators to easily insert fields and/or grids into an email template. This functionality provides the ability to automatically populate and/or calculate data from Temenos Infinity when the email is generated.

The following actions can be performed within the top toolbar:

Button	Description
Insert	Enables administrators to insert a field or grid into the email template.
Edit	Enables administrators to modify the properties of a grid that has been added to the email template. This tab is only enabled when a grid is selected within the Grids tab. > This button only provides the ability to edit a grid that has appears in the email template. If the grid in context has not been added to the email template, a message appears upon clicking this button to inform that the selected grid does not exist in the email.

Fields Tab

The Fields tab displays a list of the fields that are available to add to an email, grouped into the following folders:

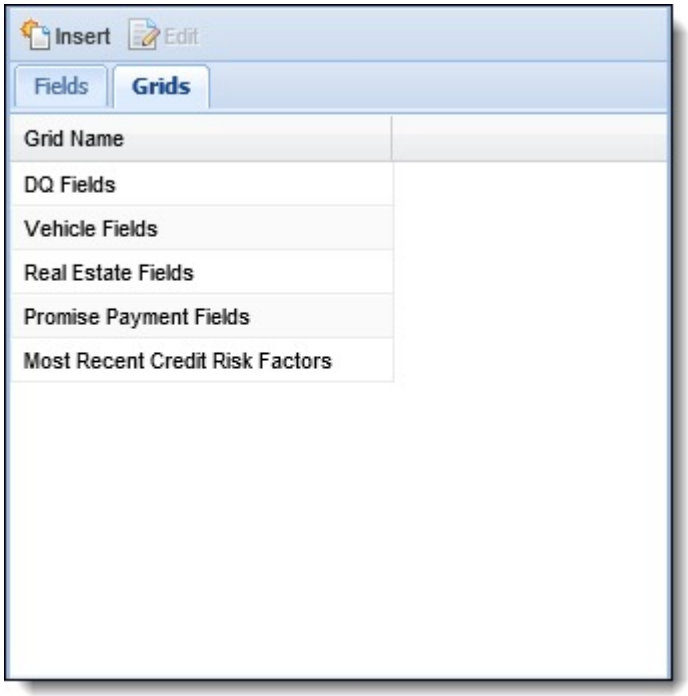
> For details on when Account > Persons fields or Person fields should be used, please see the Letters and Forms: Person vs. Account > Person Fields example in this guide.

Folder Name	Description
Account	Contains all of the fields associated to the account. The Account folder contains the Primary and Secondary folders. Select fields from these folders if more than one person is being added to the email.
Workflow	Contains all of the fields customized in the Configure Fields tab when building a workflow.
Person	Contains all of the fields associated to the person.
Case	Contains all of the fields that are associated to a case, including Case Custom fields.

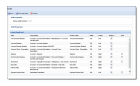
Account - Promise Fields	Contains the fields relative to promise amounts, such as First Promise amount, last promise amount, etc. Use Total Promise Amount to display the total amount promised for that account.
Account - Payment Fields	Contains the fields associated to payments such as payment amount, payment date, transfer source account, and transfer destination account.
End User Fields	Contains all of the fields that can be used in relation to the user. Use these fields to sign an email with institutions employees contact information.
Date Fields	Contains Current Date Fields. These fields are used when the current date or a current day plus a designated amount of days date range needs to be added.
Email Recipient Fields	These fields are used to populate the Contacts information. This folder contains two fields: Recipient First Name and Recipient Last Name.

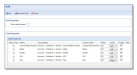
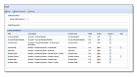
Grids Tab

Grids can be used to present a variety of information in an easy-to-read table format within an email.



The table below provides an overview of each grid that is available to add to an email along with a description of the grid and example of the default properties that are set for each grid within the Grid configuration window:

Grid Name	Description	Default Grid Properties
DQ Fields	This grid contains account related delinquency information such as Balance, DQ Amount, Due Date, etc.	

Vehicle Fields	This grid contains vehicle collateral information such as Make, Model, VIN, etc. Temenos Infinity supports multiple pieces of Collateral. This allows the institution to place multiple collateral in an email within a grid. These fields are not available in the field tree.	
Real Estate Fields	This grid contains real estate fields such as address, description, Parcel Number, and Property type description. These fields are not available in the field tree.	
Promise to Pay Fields	This grid provides pertinent information regarding an account holder's promise to pay information.	
Most Recent Credit Risk Factors	This grid displays any credit report risk factors associated to a person when a credit report is generated.	

3 - Preview

The Preview section enables the ability to review an email template before it is created. For emails with Account or Contact recipients, administrators are able to enter an account number, case number, or SSN/TIN to generate the email and automatically populate information specific to the account, case, or person.

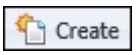
> For more information on this functionality, please see the Previewing an Email section in this topic.

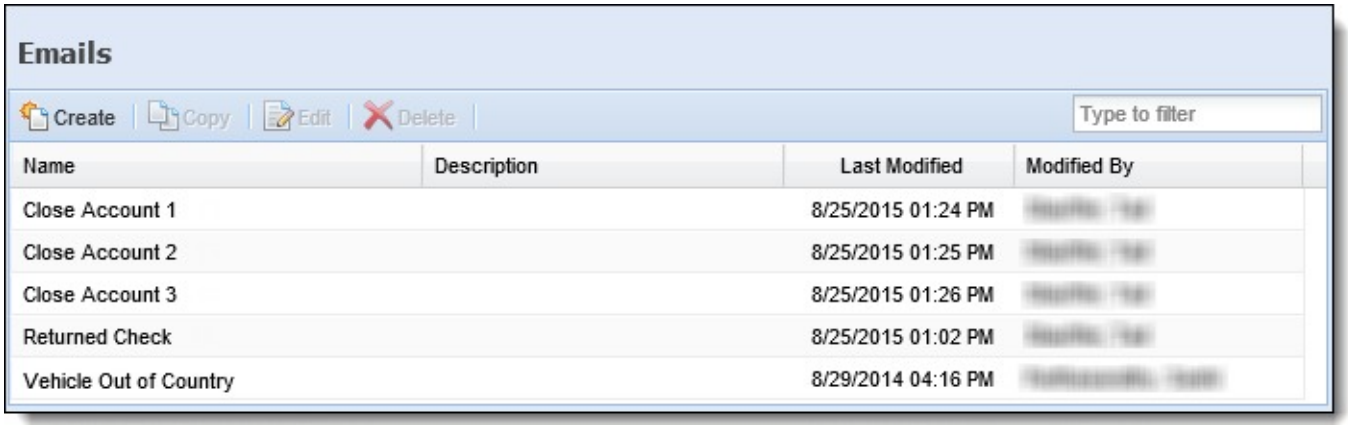
Email Actions

Within the Emails page, administrators are able to perform the following actions:

- Create an Email Template
  - Add Fields
  - Add Grids
  - Preview Email Template
- Copy an Email Template
- Edit an Email Template
- Delete an Email Template

Create an Email Template

To create an email template, click  within the top of the Emails page.



Within the New Email window, complete the General Email attributes.

Once all General attributes are defined, if the email is for Account or Contact recipients, assign the roles to receive the email within the Roles tab.

After all roles have been assigned, navigate to the Design tab to customize the content of the email. Within the Design tab, enter the desired text in the Body section, leaving spaces for the fields and/or grids to be inserted from the left panel. Once the desired text has been entered, navigate to the left panel to perform the following actions:

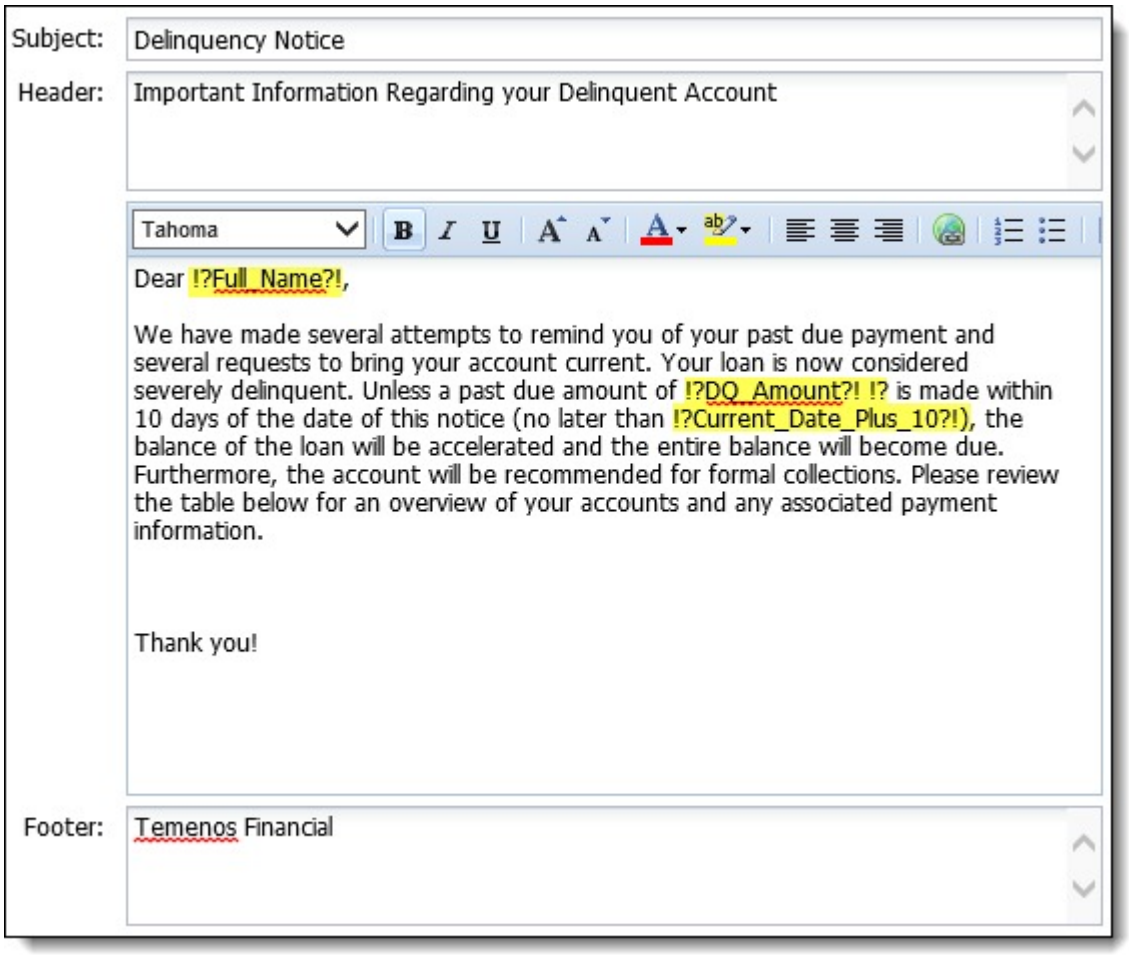
Add Fields

To add fields from the Fields tab:

- Search for the desired field by expanding each folder and sub-folder in the Field Tree or entering the field name within the filter box that appears in the top of the Fields tab.

  > When configuring an email for account or contact recipients, use Person fields rather than Primary or Secondary fields to ensure the email is sent to every person related to the account.

- Select the desired field and the click within the Body section to identify the location for where it should be inserted.
- Once the location in the email body is determined, double-click the field within the Fields tab or click Insert in the top toolbar to add the field to the email.
- Repeat the process for each desired field.
- Once added, each field populates in the Word document as shown in the below example:



When all fields have been added, insert a grid from the Grids tab or navigate to the Preview section to review the email template.

Add Grids

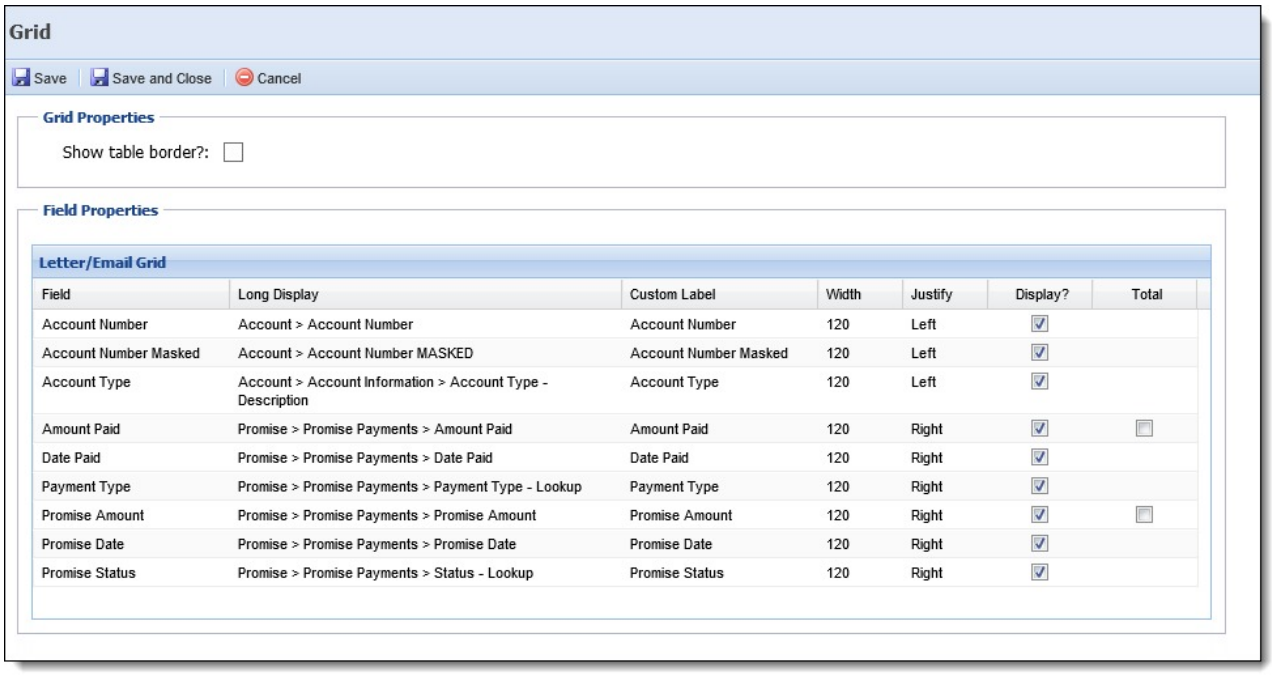
To add a grid:

- Select the desired grid within the Grids tab and click Insert.

> While multiple grids can be added to an email, the same grid can only be configured to appear in an email once.

- A window opens to configure the grid and field properties.

> The fields that appear in each window are determined by the grid selected. Some of the fields displayed in these grids are not available in the field tree. The following example is for the Promise Payment Fields grid. Please see Grids Tab within the Fields/Grids section in this topic for an overview of each grid and the default settings that appear within the configuration window.



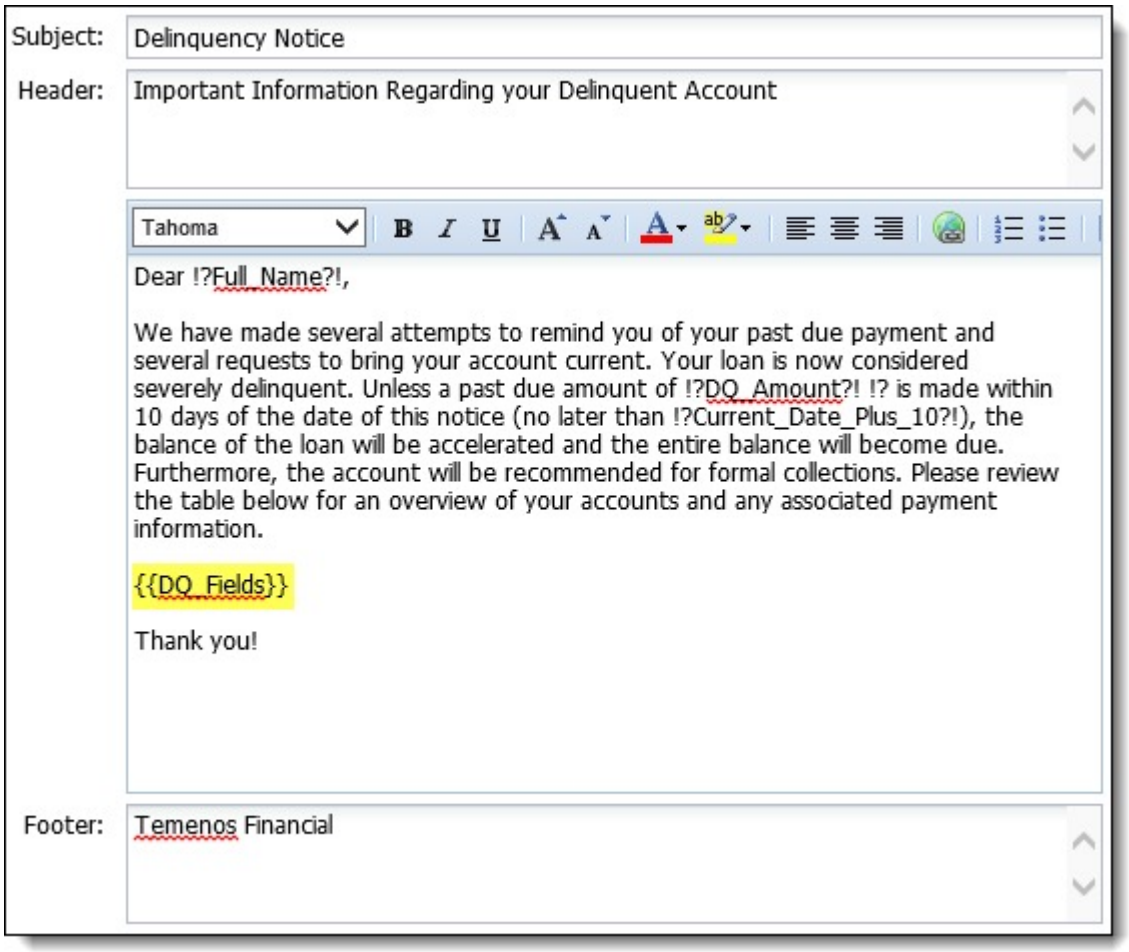
Field	Long Display	Custom Label	Width	Justify	Display?	Total
Account Number	Account > Account Number	Account Number	120	Left	☑	
Account Number Masked	Account > Account Number MASKED	Account Number Masked	120	Left	☑	
Account Type	Account > Account Information > Account Type - Description	Account Type	120	Left	☑	
Amount Paid	Promise > Promise Payments > Amount Paid	Amount Paid	120	Right	☑	☐
Date Paid	Promise > Promise Payments > Date Paid	Date Paid	120	Right	☑	
Payment Type	Promise > Promise Payments > Payment Type - Lookup	Payment Type	120	Right	☑	
Promise Amount	Promise > Promise Payments > Promise Amount	Promise Amount	120	Right	☑	☐
Promise Date	Promise > Promise Payments > Promise Date	Promise Date	120	Right	☑	
Promise Status	Promise > Promise Payments > Status - Lookup	Promise Status	120	Right	☑	

- Within the Grid Properties section, determine if a table border should display for the grid by selecting the Show Table Border check box. When this check box is selected, a border appears around the grid when the email is generated.
- Within the Field Properties section, define the properties to appear for each field when the email is generated.
  - The Field and Long Display columns list the name and location of the field in Temenos Infinity. These columns are not editable.
  - In the Custom Labels column, define the label to appear for each field in the email.
  - Once the custom labels are defined, determine the width for each individual column and identify if columns should have left, center or right justification.
  - Select or deselect check boxes within the Display column to determine whether or not a field appears in the email. When the Display check box is selected, the column populates in the grid when the email is generated.

> If monetary Amount fields are configured to appear within the email, the values are rounded using the standard rounding method and are displayed with two decimal places when the email is generated.

- A check box displays in the Total column for each amount field that appears in the grid. Select the check box in the Total column to display a total calculation of each value of the field in the email.
- By default, all fields are listed alphabetically within the Letter/Email grid; however, the order of the fields can be modified by dragging and dropping the fields into the desired grid location.

- When all grid and field properties have been defined, click Save and Close to return to the Design tab.
- The grid is added to the Body of the email as shown below:



> Once a grid has been added, the field and grid properties can be modified by selecting the grid name within the Grids tab and clicking Edit.

Preview Email

After the email text has been defined and all desired fields/grids have been added, navigate to the Preview section to view how the email appears when generated.

Within this section, enter the following information to preview an email for account or cContact recipients:

Field	Description

Account #	Enter an account number to generate the email and populate information for the account and any related account holder(s) into the applicable fields.
Case #	Enter a case number to generate the email and populate information for the case and any related person(s) into the applicable fields.
SSN/TIN	Enter a SSN/TIN to generate the email and populate information for the person and any related accounts or cases into the applicable fields.

Once all Preview parameters have been defined, click Preview This Email to generate the email.

Information populates within each field configured to appear in the email template as shown below:

Preview Email

Subject: Delinquency Notice

Important Information Regarding your Delinquent Account

Dear Colin [illegible],

We have made several attempts to remind you of your past due payment and several requests to bring your account current. Your loan is now considered severely delinquent. Unless the past due amount of 1,074.82 is made within 10 days of the date of this notice (no later than 05/22/2016), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. Please reference the table below for an overview of your accounts and any associated payment information.

Account Number Masked	Account Type - Description	Balance	DQAmount	Due Date	Payment Amount Due
##1108	Auto loans	$2,203.38	$1,074.82	04/08/2016	$1,665.97
##1108	Deposit/Savings	$10.00	$0.00		$0.00

Thank You!

Temenos Financial

NOTE: The recipient name fields will populate at the time the email is sent.

After all desired information has been added to the template, click Save and Close within the top of the New Email window to create the email template. The new email template populates within the Emails grid and is available to be added to a Send Email workflow step.

Copy an Email Template

To copy an email template:

- Select the desired template within the Emails grid.
- Click Copy. The Copy Email Template screen appears.
- Enter a new name for the template and navigate through the other tabs to make any additional changes.

- Once all updates have been made, click Save and Close to create the new template. The new email template populates within the Emails grid and is available to be added to a Send Email workflow step.

Edit an Email Template

To edit an email template:

- Double-click the desired template within the Emails grid or select the template and click Edit.
- The Edit Email Template screen appears.
- Navigate through the tabs and make any necessary changes to the attributes.
- When all information has been updated, click Save and Close to retain the modified template and return to the Emails page.

Delete an Email Template

To delete an email template:

- Select the desired template within the Emails grid.
- Click Delete.
- A message appears to confirm that the email template should be deleted. Click **Yes** to delete the email template or **No** to retain the template and return to the Emails page.

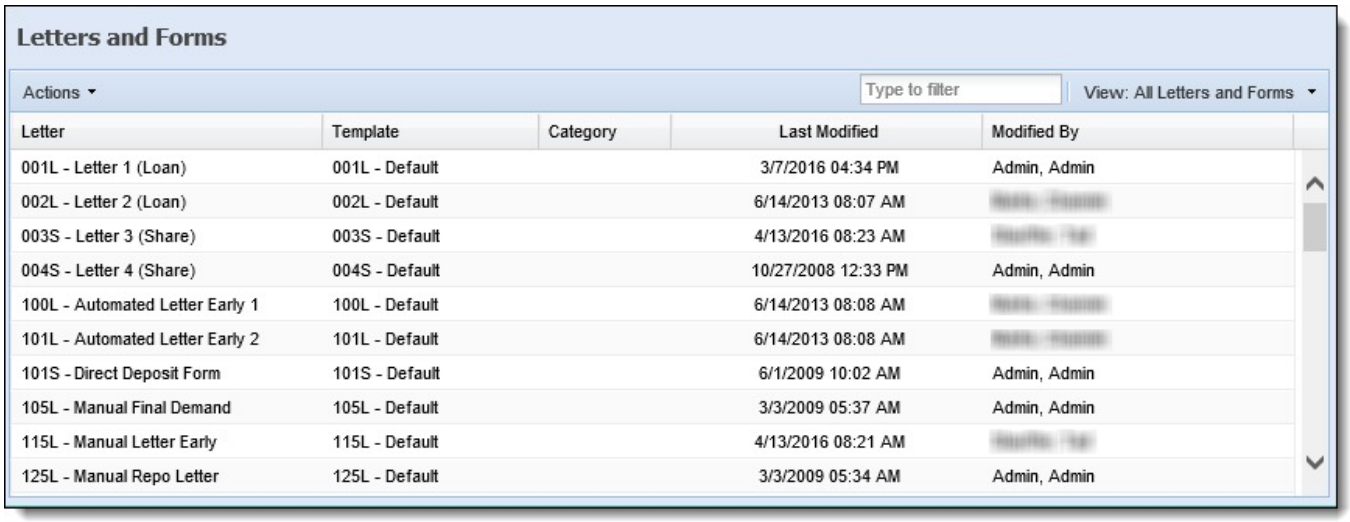
Letters and Forms

> The first time the Letters and Forms page is opened in Temenos Infinity, an error message prompting the administrator to install a CAB file from an unknown publisher may be received. The required CAB file is provided to the institution by Temenos. Please contact a Temenos Customer Care Representative for more information.

The Letters and Forms page (System Management > Communication > Letters & Forms) enables administrators to easily manage letters and letter templates. Letters configured within this page can be incorporated into the Send Letter workflow step and run by users when working persons or accounts.

> For more information on the configuration of the Send Letter workflow step, please see the Send Letter Workflow Step topic in this guide.

By default, all letters and forms are displayed within the grid; however, administrators can filter results by either typing in the filter box or using the View drop-down.



The grid on this page displays the following columns of information for each letter:

Column Name	Description
Letter	Displays the name of the letter in the following format: Letter Code-Letter Name.
Template	Displays the name of the template to which the letter is associated.
Category	Displays the category of the letter.
Type	Designates whether it is a letter or a form.
Last Modified	Denotes when the last modification on the letter was made.
Modified By	Denotes who made the last modification on the letter.

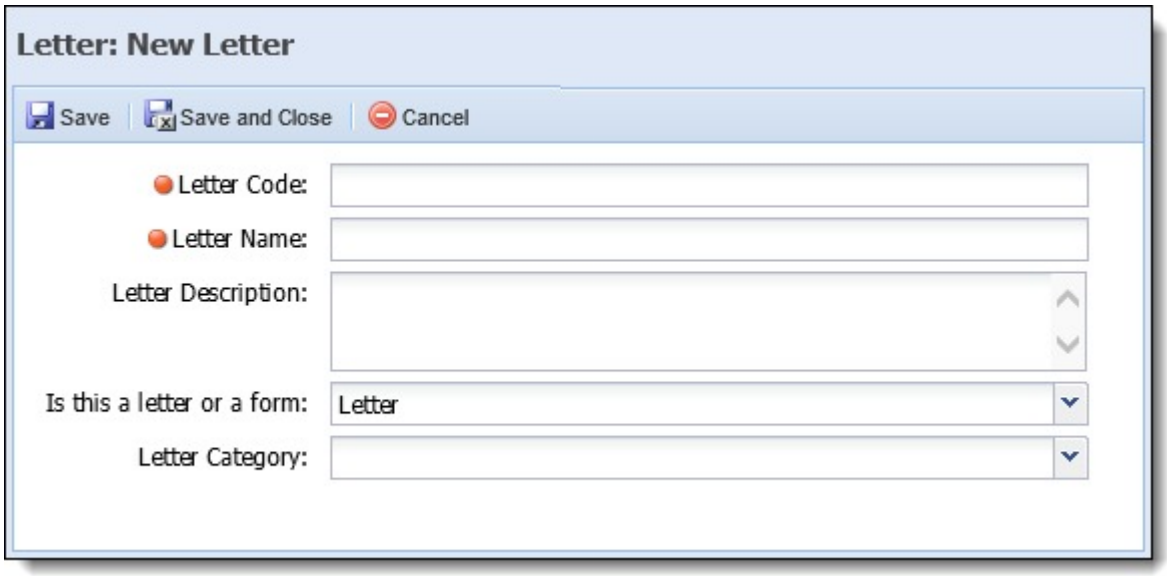
The Actions drop-down that appears above the grid displays all of the functions associated to the Letter and Forms page, such as creating and editing both letters and templates.

> Please see the sections in this topic for Letter Actions and Template Actions for an overview of each function that can be performed within the Actions drop-down.

Letter and Template Attributes

Letter Attributes

All letters share common attributes that are defined when creating, editing, and copying a letter.



The following Letter attributes are defined for each letter:

Attribute	Description
Letter Code	Enter a Letter Code. This is a required field.
Letter Name	Enter a Letter Name. This name appears in the Send Letter workflow step when selecting the letter that is to be sent. This is a required field.
Letter Description	If desired, enter a description to provide more information about the letter.
Is this a letter or a form	From the drop-down, identify whether the document is a letter or a form. There is no functional difference when selecting a letter versus selecting a form.
Letter Category	From the drop-down, select a category for the letter. This is optional and is used for reporting purposes. The Letter Category drop-down populates with the values of the Letter Category lookup defined in System Management > Field Configurations.

Template Attributes

Templates provide administrators with the ability to define the foundation and content of the letter, such as the fields and grids that populate with information for the applicable account holders, as well as determine how a letter is generated and to whom a letter including account and/or person information is sent.

By default, letter templates are saved in .docx format, enabling the ability to use developer tools within Microsoft Word when creating the template. Templates can be configured using developer tools to create attributes, such as check boxes and drop-down lists within Word documents.

Administrators have the ability to save letter templates as .doc or .docx as needed by accessing the template share folder. Administrators also have the ability to adjust letter templates within the template share folder.

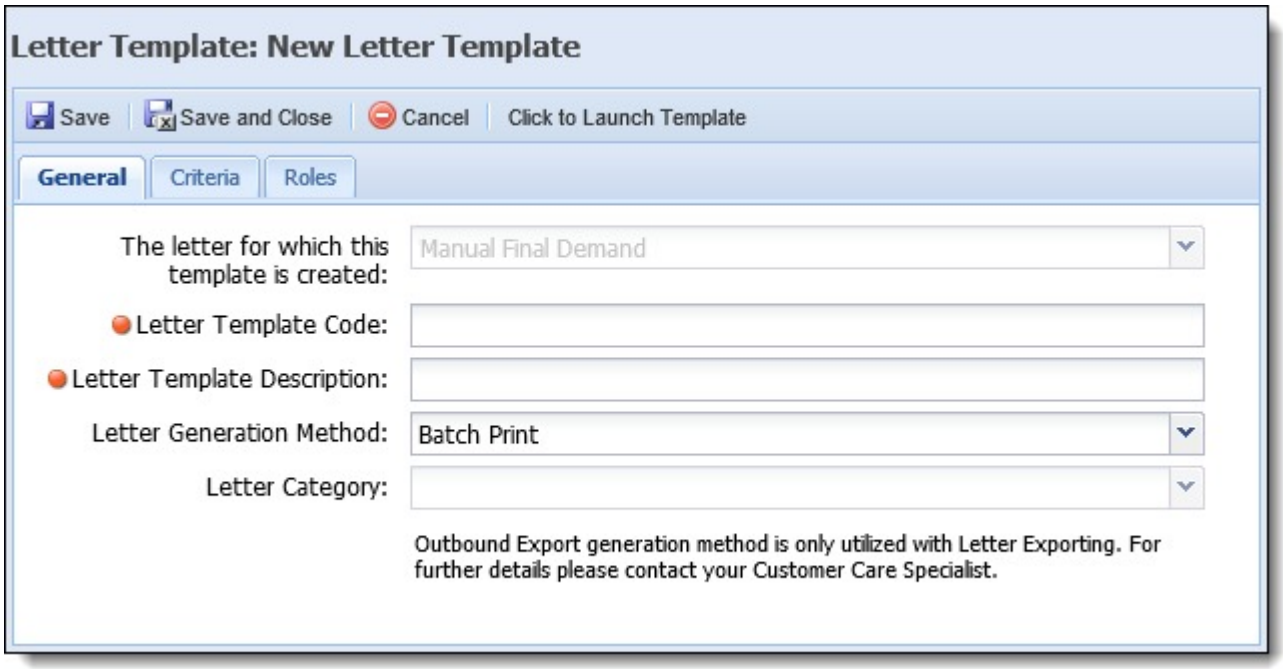
To begin creating a letter template, select a letter to apply the template to within the Letters and Forms grid and click **Create Template** in the Actions drop-down.

Within the New Letter Template window, administrators are provided with the ability to define the following template attributes:

- General
- Criteria
- Roles

General

General attributes allow administrators to define the basic information for the template, such as the letter template code and letter generation method.



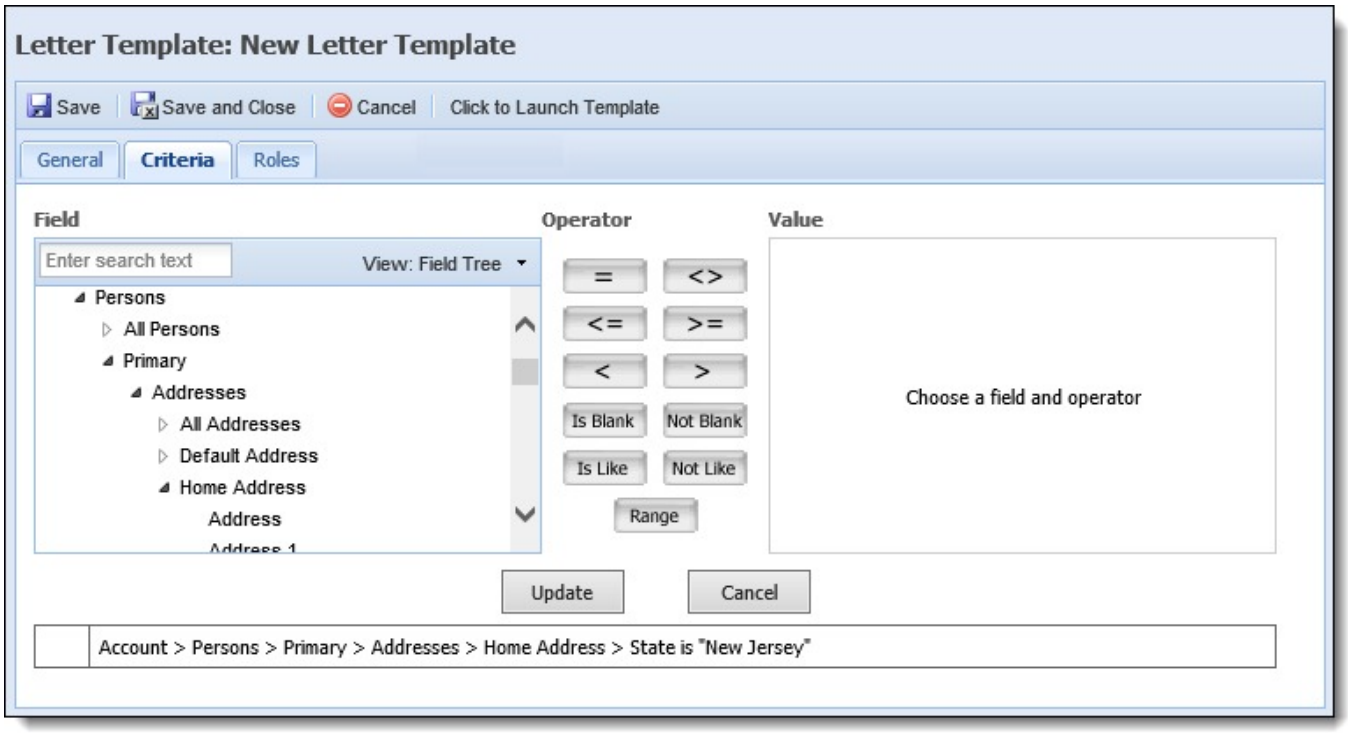
The following template attributes are defined within the General tab:

Attribute	Description
The letter for which the template is created	A read-only field that displays the letter for which the template is being created.
Letter Template Code	Enter the template code for the new template. The template code carries over from what was defined when the letter was created. Temenos recommends keeping the code the same as the letter for consistency purposes. This is a required field.
Letter Template Description	Enter a description for the new letter template. This is a required field.

Letter Generation Method	Select one of the following letter generation methods: • On Demand – This allows the user to print the letter within the Send Letter workflow step. The user can also edit the letter when executing the workflow step. • Batch Print – The letter is sent to Temenos Infinity's Batch Letting Printing feature. Any user that has permissions to Batch Letter Printing can print whenever he/she desires. The user does not have the option to view/edit or print the letter when executing the workflow step. • Outbound Export – This method is only utilized with the Letter Export functionality. The user running the workflow does not have the option to view/edit/print the letter in the workflow step. Users are also not able to view/edit/print the letter from the Letter History screen. Letter Export settings are set in System Management > Exports > Other Actions. Outbound letter export functionality does not support the export of grid data. If a letter contains a grid, the letter exports with all content excluding the grid.
Letter Category	A read-only field that displays the category defined during creation of the letter.

Criteria

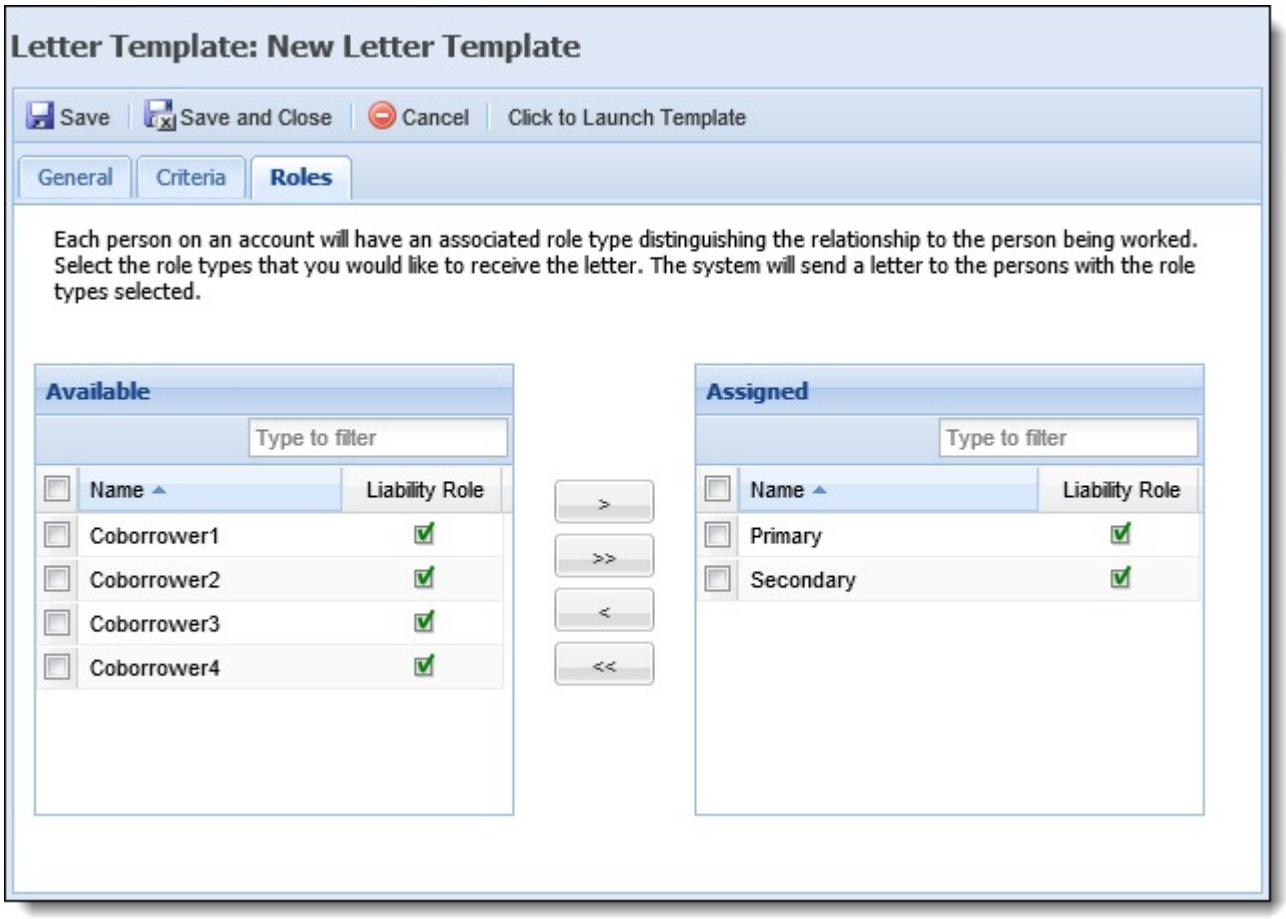
Criteria attributes allow administrators to define the criteria an account must meet in order for a specific letter template to be generated. When a letter is associated with multiple templates, the criteria defined within this tab determines which template is used when the letter is generated.



For example, an institution may have customers in three different states: New Jersey, Delaware, and New York. Because of statewide regulations, the templates for each state must be designed differently to conform to the regulations for each state. When building a template for the state of New Jersey, the administrator can set the criteria to look for the primary's home state to be New Jersey so when the letter is sent, it is only sent to appropriate customers in New Jersey.

Roles

Role attributes enable administrators to assign the role types that are to receive the letter. When a letter including account and/or person information is generated in the Send Letter workflow step, it is sent to all account holders related to the account(s) associated with the workflow who hold a role that corresponds to a role type assigned within this tab.



The following role attributes are assigned within the Roles tab:

Attribute	Description
Available Roles	Displays a list of all roles defined in System Management > Role Types. Assign roles to the template by selecting the desired role type(s) from the list and moving the role type(s) to the Assigned box using the arrows that are displayed. At least one Role type must be selected. If no role types are selected, a message appears directing the user to assign at least one role.
Assigned Roles	Displays the roles types to receive the letter. When a letter including account and/or person information is generated in the Send Letter workflow step, the system automatically generates a letter to the person(s) with the role types assigned within this box. For example, when the Primary and Secondary role types are assigned to a letter template, both the primary and joint account holders receive a letter once it is generated. The primary role code within the database is imported into Temenos Infinity and automatically mapped to all letters upon completion of the first batch import. For more information, please see the connector guide for the applicable core interface.

Letter and Template Actions

Letters are formed by first creating a letter and then building a template for the letter.

The Actions drop-down that appears in the Letters and Forms page provides administrators with the ability to easily create and manage both letters and templates.

Letter Actions

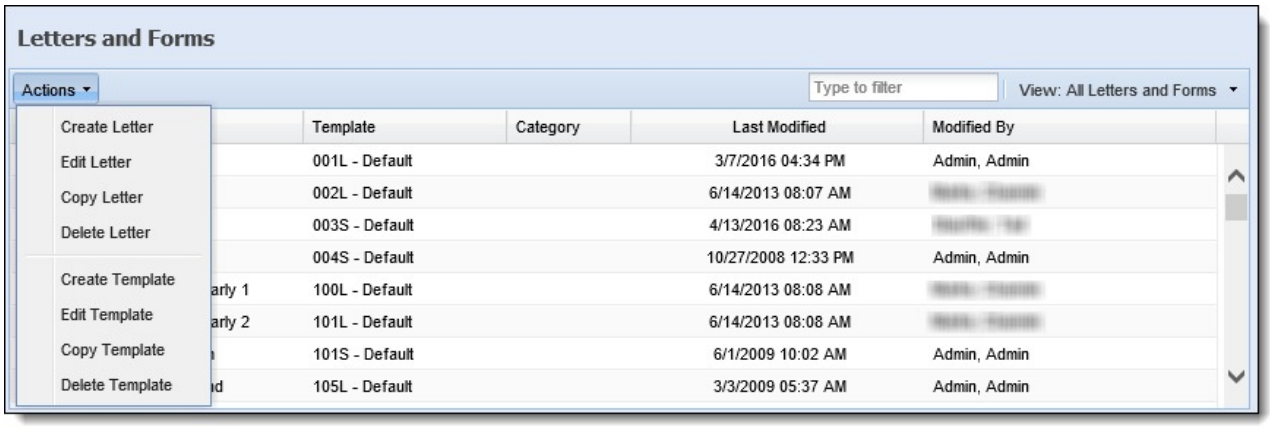
Within the Actions drop-down, administrators are provided with the ability to perform the following actions to create and manage letters:

- Creating a Letter
- Editing a Letter
- Copying a Letter
- Deleting a Letter

Creating a Letter

To create a letter:

- Click the **Actions** drop-down and select **Create Letter**.



- The Create Letter screen appears.
- Define the letter attributes.
- When finished defining the letter attributes, click

to create the letter. The new letter populates within the Letters and Forms grid.
- Once a letter is created, a default template is automatically created for the letter and populates within the Letters and Forms grid.

> To avoid having multiple templates for the same letter, it is recommended to edit the default letter template rather than create a new template.

- To edit the default template or begin creating a new template, select the letter within the grid and navigate to the Actions drop-down to select the desired action.

> For information on how to define a letter template, please see the Creating a Template or Editing a Template section in this topic.

Editing a Letter

To edit a letter:

- Select the desired letter within the Letter and Forms grid.
- Click the Actions drop-down and select **Edit Letter.**
- The Edit Letter window appears.
- Make the desired updates to the letter.
- Once all modifications have been made, click Save and Close to retain the changes and return to the Letters and Forms page.

Copying a Letter

To copy a letter:

- Select the desired letter within the Letters and Forms grid.
- Click the Actions drop-down and select **Copy Letter**.
- The Copy Letter screen appears.
- Enter a new Letter Code and make any additional updates to the other letter attributes.
- Once all attributes have been defined, click Save and Close to create the letter. The new letter populates within the Letters and Forms grid. After the letter is created, select the letter within the grid and navigate to the Actions drop-down to begin creating a template for the letter.

> For information on how to define a letter template, please see the Creating a Template section in this topic.

Deleting a Letter

> Letters associated with a workflow cannot be deleted. When attempting to delete a letter that is associated with a workflow, a message appears to inform that the letter cannot be deleted. To delete the letter, the letter must first be removed from the workflow(s) to which it is associated.

To delete a letter:

- Select the desired letter within the Letters and Forms grid.
- Click the Actions drop-down and select **Delete Letter.**
- A message appears to confirm that the letter should be deleted. Click **Yes** to delete the letter or **No** to retain the letter and return to the Letters and Forms page.

Template Actions

Within the Actions drop-down, administrators are provided with the ability to perform the following actions to create and manage templates:

> The ability to create or edit a letter template is not supported in the Edge browser. When trying to create a new template, or edit an existing template in Edge, an error message is received stating that the Temenos Browser Control failed to load, and should be downloaded from the Help menu. The Temenos Browser Control is not available for the Edge browser; therefore, it cannot be downloaded from Download Controls option in the Help menu.

> If a letter is not selected within the grid, a message appears upon clicking any of the below actions to inform that a letter must be selected in order to perform the action.

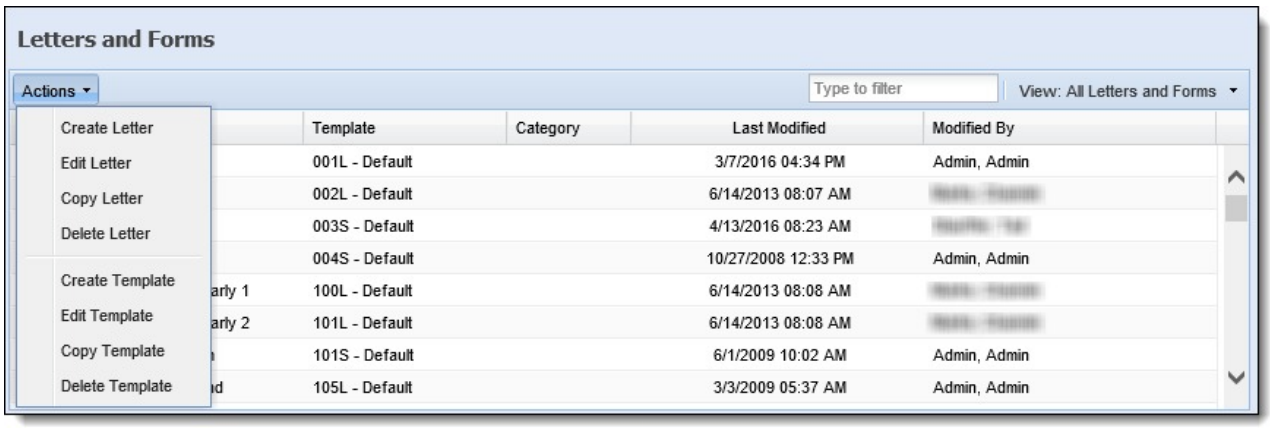
- Creating a Template
- Editing a Template

- Copying a Template
- Deleting a Template

Creating a Template

Templates are created by defining the template attributes and customizing the content of the letter within the template editor.

- To begin creating a letter or form template, select the desired letter within the Letters and Forms grid.
- Click the Actions drop-down and select **Create Template.**



- The New Letter Template window appears.
- Define the template attributes within the General tab, Criteria tab, and the Roles tab.
- Once all attributes are defined, navigate to the top of the window and click **Click to Launch Template** to open the template editor.

> Please see the Template Editor section in this topic for more information on the functionality available to customize letters within the template editor.

- After the letter content has been defined and previewed within the template editor, click

in the New Letter Template window to create the template. The new template populates with the assigned letter in the Letters and Forms grid and the letter is available to be added to a Send Letter workflow step.

> Letters and letter templates are saved in the .docx file format; however, Temenos Infinity continues to support letters and letter templates saved as .doc files. If a letter template created prior to the 16.00 Temenos Infinity release is copied, the copied template continues to save in the .doc file format.

> For information on configuring the Send Letter workflow step, please see the Send Letter workflow step topic in this guide.

Editing a Letter Template

To edit a letter template:

- Select the desired letter template within the Letters and Forms grid.
- Double-click the template or click the Actions drop-down and select **Edit Template**.
- Within the Letter Template window, update the desired attributes.

> Since template criteria cannot be edited once a template is created, the Criteria tab is disabled when editing a template.

- Once the desired attributes have been modified, click **Click to Launch Template** to open the letter template editor to make any necessary modifications to an existing template or define the content of a default template.

> Please see the Template Editor section in this topic for more information on the functionality available to customize letters within the template editor.

- When all information has been updated, click

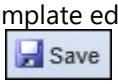
to retain the updated template and return to the Letters and Forms page.

Copying a Letter Template

To copy a letter template:

- Select the desired letter template within the Letters and Forms grid.
- Click the Actions drop-down and select **Copy Template.**
- The New Letter Template window appears.
- Enter a new Letter Template Code and make any additional updates to the other template attributes.
- Once the desired attributes have been modified, click **Click to Launch Template** to open the template editor and apply the content to the template being created.

> If no changes are required to the existing letter content, the template editor must still be opened in order to attach the content to the template being created. If the content within the template editor is not saved, a message appears upon trying to save the new template to inform that a template must be attached prior to saving. Please see the Template Editor section in this topic for more information on the template editor.

- Make any desired changes within the template editor.
- Once all updates have been made, click 

within the template editor toolbar to apply the letter content to the new template and close the template editor.
- When all information has been updated for the template, click

in the Letter Template window to create the letter template. The new template populates with the assigned letter in the Letters and Forms grid and the letter is available to be added to a Send Letter workflow step.

Deleting a Letter Template

> When a new letter is created, it is assigned a “default” template. Default templates cannot be deleted.

To delete a letter template:

- Select the desired template within the Letters and Forms grid.
- Click the Actions drop-down and select **Delete Template.**
- A message appears to confirm that the template should be deleted. Click **Yes** to delete the template or **No** to retain the template and return to the Letters and Forms page.

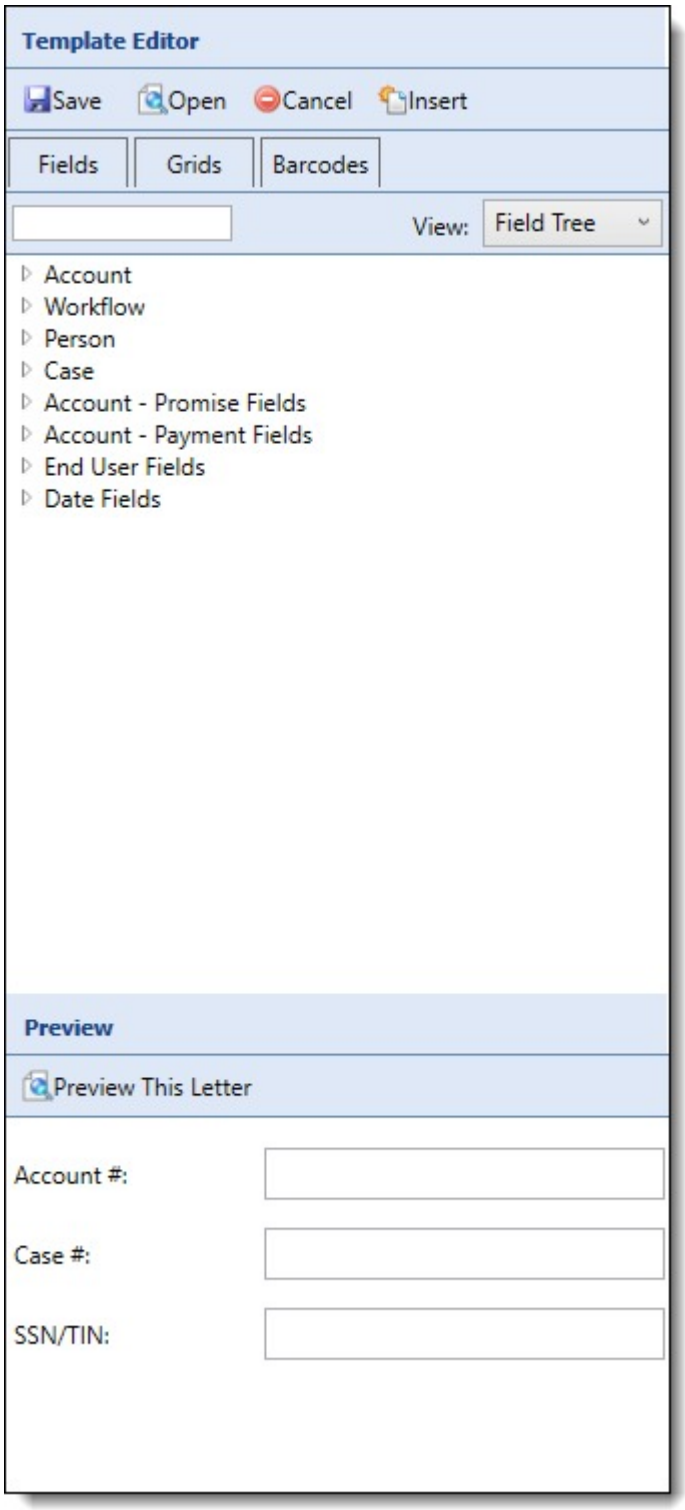
Template Editor

> Prior to designing a letter template, it is recommended to determine the type of person information that appears in the letter, such as whether a letter should only include information for the person receiving the letter or should include information for all people associated to the account. This determination drives whether Person fields or Account > Person fields should be used to create the letter template. For more information, please see the Letters and Forms: Person vs. Account > Person Fields example.

The Template Editor allows administrators to insert fields and/or grids into a Word document to automatically populate information from Temenos Infinity directly within the letter, as well as add a barcode to a document that automatically identifies the letter as undeliverable if returned in the mail.

Upon clicking **Click to Launch Template** in the Letter Template window, the system attempts to authenticate the user's session.

Once authenticated, a Word document opens along with the Template Editor to enable administrators to define the content that appears in the letter template.



The Template Editor enables administrators to easily insert fields and/or grids into a letter template, add a barcode to a template, as well as open an existing Word document to edit and use as a base for the template.

The actions listed below can be performed within the top toolbar:

Button	Description
Save	Enables administrators to save the updates made to a template. When this button is clicked, the Template Editor closes and returns administrators to the Letter Template window.

Open	Enables administrators to open a pre-configured Word document from the File Explorer to edit and use for the template.
Cancel	Enables administrators to cancel the changes made to a template.
Insert	Enables administrators to insert a field into the letter template.

The following tabs appear within the top of the Template editor to provide administrators with the ability to insert fields and/or grids into a letter, as well as add a barcode to a letter template:

Fields

The Fields tab allows administrators to add fields to a letter to automatically populate and/or calculate the data when the letter is generated.

This tab displays a list of the fields that are available to add to a letter, grouped into the following folders:

Folder Name	Description
Account	Contains all of the fields associated to the account. The Account folder contains the Primary and Secondary folders. Select fields from these folders if more than one person is being added to the letter. For details on when the Account > Persons fields should be used, please see the Letters and Forms: Person vs. Account > Person Fields topic within the User and Administrator Guide.
Workflow	Contains all of the fields customized in the Configure Fields tab when building a workflow.
Person	Contains all of the fields associated to the person. For details on when the Persons fields should be used, please see the Letters and Forms: Person vs. Account > Person Fields topic within the User and Administrator Guide.
Case	Contains all of the fields that are associated to a case, including Case Custom fields.
Account - Promise Fields	Contains the fields relative to promise amounts, such as First Promise amount, last promise amount, etc. Use Total Promise Amount to display the total amount promised.
Account - Payment Fields	Contains the fields associated to payments such as payment amount, payment date, transfer source account, and transfer destination account.
End User Fields	Contains all of the fields that can be used in relation to the user. These fields may be used to sign a letter if the letter should contain the institution employee's contact information.
Date Fields	Contains the Current Date Fields. These fields are used when the current date or a current day plus a designated amount of days date range needs to be added.

Pre-Petition Cash Flow Scheduled Payment Fields	Contains the fields associated with payments scheduled for a pre-petition cash flow.
Pre-Petition Cash Flow Transaction Fields	Contains the fields associated with transactions that were performed on a pre-petition cash flow.
Post-Petition Cash Flow Scheduled Payment Fields	Contains the fields associated with payments scheduled for a post-petition cash flow.
Post-Petition Cash Flow Transaction Fields	Contains the fields associated with transactions that were performed on a post-petition cash flow.

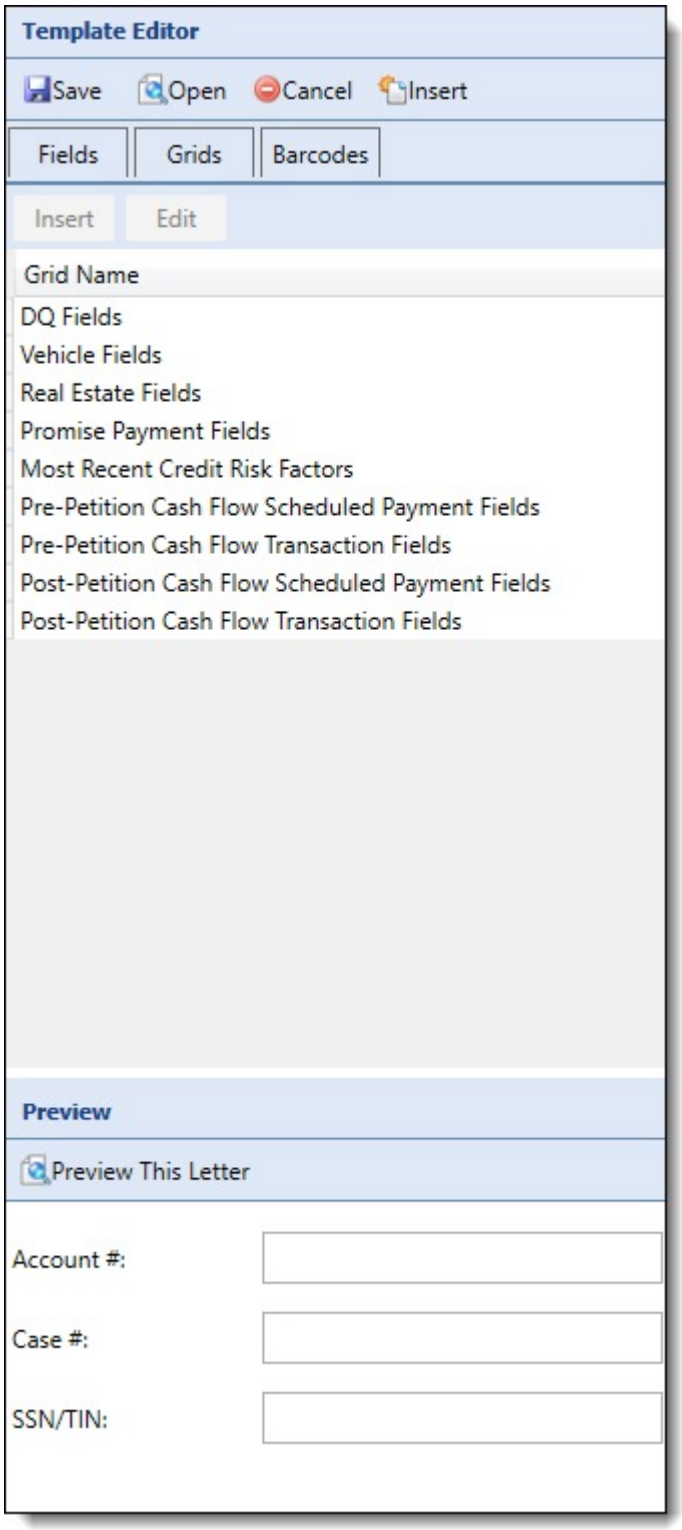
Reference the following list for tips to consider when adding fields to a letter template:

- Microsoft Word calculated fields are not supported in letter templates due to the inability to display the field in the letter history. If this functionality is desired, institutions can create a calculated custom field in System Management > Custom Fields, and add that field to the letter template.

Grids

Grids can be used to present a variety of information in an easy-to-read table format within a letter.

In order to return data on multiple accounts, it is recommended to add a grid to any letter intended to run via a multi-account workflow.



The table below provides an overview of each grid that is available to add to a letter from the Grids tab along with a description of the grid, and a list of the fields that display in the grid by default.

Grid Name	Description	Default Fields

DQ Fields	This grid contains account related delinquency information such as Balance, DQ Amount, Due Date, etc.	The following fields are configured to display in the DQ Fields grid by default (Field Name - Long Display): • Account Link Masked - Account > Account Information > Miscellaneous > Account Link MASKED • Account Number - Account > Account Number • Account Number Masked - Account > Account Number Masked • Account Type - Account > Account Information > Account Type - Description • Balance: - Account > Balance • Current Late Charges - Account > Account Information > Fees and Charges > Current Late Charges • DQ Amount - Account Specialty Processes > Delinquency > DQ Amount • Interest Rate - Account > Account Information >

		Principal and Interest > Interest Rate • Payment Amount Due - Predefined Calculation • SSN/TIN Masked - SSN/SSN/TIN Masked
Vehicle Fields	This grid contains vehicle collateral information such as Make, Model, VIN, etc. Temenos Infinity supports multiple pieces of Collateral. This allows the institution to place multiple collateral in a letter within a grid. These fields are not available in the field tree.	The following fields are configured to display in the Vehicle Fields grid by default (Field Name - Long Display): • License Plate Number - Account > Collateral > Vehicle > License Plate Number • Make - Account > Collateral > Vehicle > Make • Model - Account > Collateral > Vehicle > Model • VIN - Account > Collateral > Vehicle > VIN • Year - Account Collateral > Vehicle > Year

Real Estate Fields	This grid contains real estate fields such as address, description, Parcel Number, and Property type description. These fields are not available in the field tree.	The following fields are configured to display in the Vehicle Fields grid by default (Field Name - Long Display): • Address - Account > Collateral > Real Estate > Address Line 1, Address Line 2, Address Line 3, City, State, and Zip • Description - Account > Collateral > Short Description 1 • Parcel Number - Account > Collateral > Real Estate > Parcel Number • Property Type - Account > Collateral > Real Estate > Property Type - Desc

Promise to Pay Fields	This grid provides pertinent information regarding an account holder's promise to pay information.	The following fields are configured to display in the Promise to Pay Fields grid by default (Field Name - Long Display): • Account Number - Account > Account Number • Account Number Masked - Account > Account Number Masked • Account Type - Account > Account Information > Account Type - Description • Amount Paid - Promise > Promise Payments > Amount Paid • Date Paid - Promise > Promise Payments > Date Paid • Payment Type - Promise > Promise Payments > Payment Type - Lookup • Promise Amount - Promise > Promise Payments > Promise Amount • Promise Date - Promise > Promise Payments > Promise Date • Promise Status - Promise > Promise

		Payments >Status - Lookup
Most Recent Credit Risk Factors	This grid displays any credit report risk factors associated to a person when a credit report is generated.	The following field is configured to display in the Most Recent Credit Risk Factors grid by default (Field Name - Long Display): • Risk Factor Description - Risk Factor Description

Pre-Petition Cash Flow Scheduled Payment Fields	This grid contains fields pertaining to payments scheduled for a pre-petition cash flow.	The following fields are configured to display in the Pre-Petition Cash Flow Scheduled Payment Fields grid by default (Field Name - Long Display): • Actual Payment Date - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Actual Payment Date • Actual Payment Variance - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Actual Payment Variance • Bill Amount Satisfied - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Bill Amount Satisfied • Comments - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Comments • Payment Amount - Account > Cash Flow > Pre-

			Petition Cash Flow > Payment Amount • Payment Date - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Payment Date • Payments Past Due - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Payment Past Due • Remaining Balance - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Remaining Balance • Total Exclusion Amount - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Total Exclusion Amount • Total Statement Amount - Account > Cash Flow > Pre-Petition Cash Flow > Scheduled Payment > Total Statement Amount

Pre-Petition Cash Flow Transaction Fields	This grid contains fields pertaining to the transaction details for a pre-petition cash flow.	The following fields are configured to display in the Pre-Petition Cash Flow Transaction Fields grid by default (Field Name - Long Display): • Applied Total Amount - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Applied Total Amount • Exclusions • Posting Type - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Posting Type - Description • Reversal Reason - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Reversal Reason • Transaction Amount - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Transaction Amount • Transaction Comments - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Transaction

		Comments • Transaction Date - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Transaction Date • Transaction Exclusion Amount - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Transaction Exclusion Amount • Transaction Type - Account > Cash Flow > Pre-Petition Cash Flow >Transaction > Transaction Type - Description

Post-Petition Cash Flow Scheduled Payment Fields	This grid contains fields pertaining to payments scheduled for a post-petition cash flow.	The following fields are configured to display in the Post-Petition Cash Flow Scheduled Payment Fields grid by default (Field Name - Long Display): • Actual Payment Date - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Actual Payment Date • Actual Payment Variance - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Actual Payment Variance • Bill Amount Satisfied - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Bill Amount Satisfied • Comments - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Comments • Payment Amount - Account > Cash Flow > Post-

			Petition Cash Flow > Payment Amount • Payment Date - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Payment Date • Payments Past Due - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Payment Past Due • Remaining Balance - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Remaining Balance • Total Exclusion Amount - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Total Exclusion Amount • Total Statement Amount - Account > Cash Flow > Post-Petition Cash Flow > Scheduled Payment > Total Statement Amount

Post-Petition Cash Flow Transaction Fields	This grid contains fields pertaining to the transaction details for a post-petition cash flow.	The following fields are configured to display in the Post-Petition Cash Flow Transaction Fields grid by default (Field Name - Long Display): • Applied Total Amount - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Applied Total Amount • Exclusions • Posting Type - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Posting Type - Description • Reversal Reason - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Reversal Reason • Transaction Amount - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Transaction Amount • Transaction Comments - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Transaction

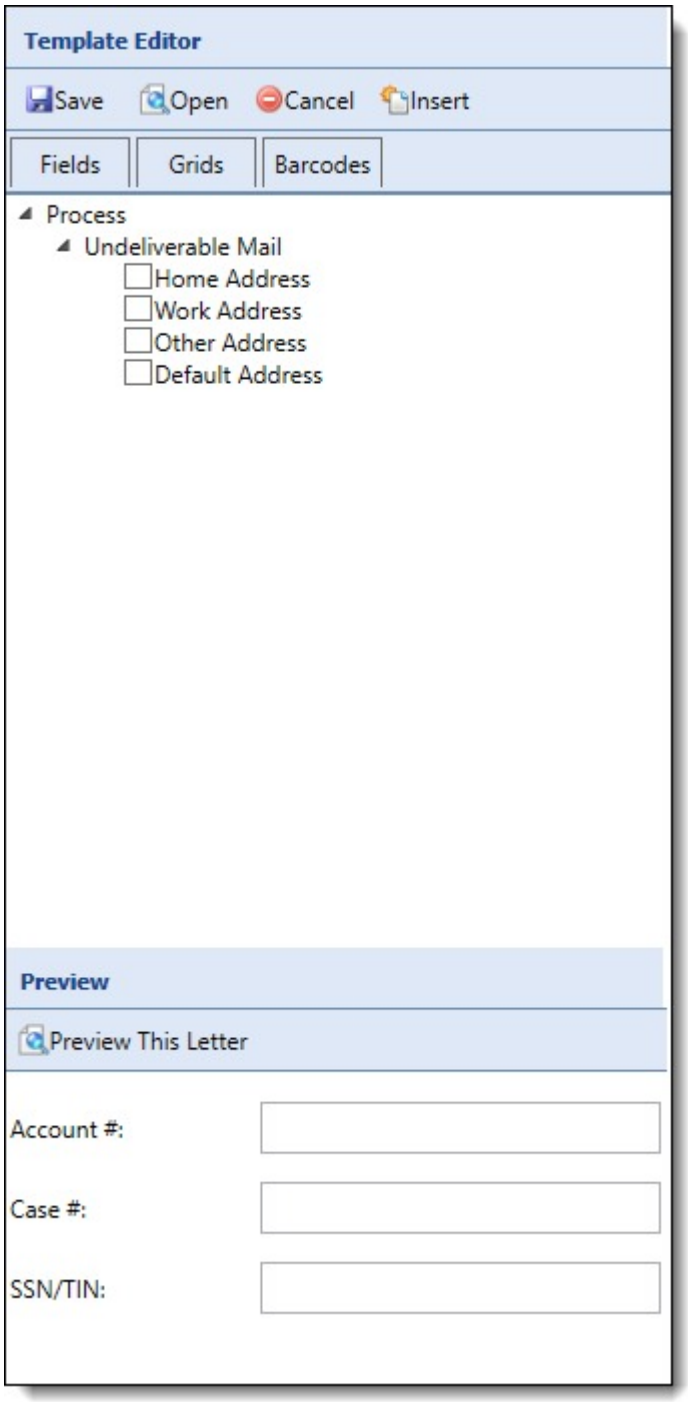
		Comments • Transaction Date - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Transaction Date • Transaction Exclusion Amount - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Transaction Exclusion Amount • Transaction Type - Account > Cash Flow > Post-Petition Cash Flow >Transaction > Transaction Type - Description

Barcodes

A barcode can be added to a letter template to automatically identify the letter as undeliverable if returned in the mail. When the letter is returned to the financial institution, a scanned image of the letter can be uploaded to a specified location to allow the barcode to be read by a process that automatically attaches the letter to the associated account or case, and sets a bad address flag for the identified address in Temenos Infinity.

> In order to use the barcode functionality, the process must be activated within the Letter Barcode Activation page. Please see the Letter Barcode Activation and Scanning Exceptions topic in this guide for more information.

Within the Barcodes tab, administrators are able to identify the process to be performed when a barcode is scanned, and add the barcode to a letter template.



Each letter barcode includes 10-digit number that associates the letter with a person and address in Temenos Infinity when the letter is generated.

> The barcode number is zero padded and increased by one each time a letter is generated. For example, the first time a letter with a barcode is generated, the barcode number is 0000000001; the next letter barcode generated is 0000000002.

The process for Undeliverable Mail allows administrators to select one of the following options to determine which address is reviewed for the associated person during the scanning process, and set as a Bad Address in Temenos Infinity:

- Home Address

- Work Address
- Other Address
- Default Address

For example, if Home Address is selected for a barcode, when the barcode is reviewed during the scanning process, the BadAddress flag is set for the home address of the person associated with the letter.

> For additional information on the scanning process, please see the Letter Barcode Process section of the Letter Barcode Activation and Scanning Exceptions topic in this guide.

Below the tabs is the Preview section, which enables the ability to review a letter template before it is created. For letters including account, case, and/or person information, administrators are able to enter an account number, case number, or SSN/TIN to generate the letter and automatically populate information specific to the account, case, or person.

> For more information on this functionality, please see the Previewing a Letter section in this topic.

Actions within the Template Editor

To begin creating the letter template, add the desired text to the Word document, leaving spaces for the fields and/or grids to be inserted from the Template Editor.

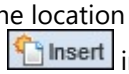
> If a Word document contains pre-existing fields, the fields must be deleted and re-mapped using fields in the Template Editor.

Once all text has been entered, navigate to the Template Editor to begin adding fields or grids to the template.

Within the Template Editor, administrators can perform the following actions to add data to the template, and ensure the template generates correctly before it is created:

Add Fields

To add fields from the Fields tab:

- Search for the desired field by expanding each folder and sub-folder in the Field Tree or entering the field name within the Filter box that appears in the top of the Fields tab.
- Select the desired field in the Template Editor and the click within the Word document to identify the location for where it should be inserted.
- Once the location in the Word document is determined, double-click the field within the Template Editor or click 

in the top toolbar to add the field to the Word document.
- Repeat the process for each desired field.
- Once added, each field populates in the Word document as shown in the below example:

Final Delinquency Notice
«Current_Date»

«Full_Name»
«Address»
«City__State__Zip»

Dear «Full_Name_0»,

We have made several attempts to remind you of your past due payment and several requests to bring your account current. Your loan is now considered severely delinquent. Unless the past due amount of «DQ_Amount» is made within 10 days of the date of this notice (no later than «Current_Date_Plus_10»), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses. This information will be reported to all credit bureau agencies to which our institution subscribes.

Please reference the table below for an overview of your accounts and any associated payment information.

Thank you,
«User_Name»
AKC Financial

When all fields have been added, insert a grid from the Grids tab or navigate to the Preview section to review the letter template.

Add Grids

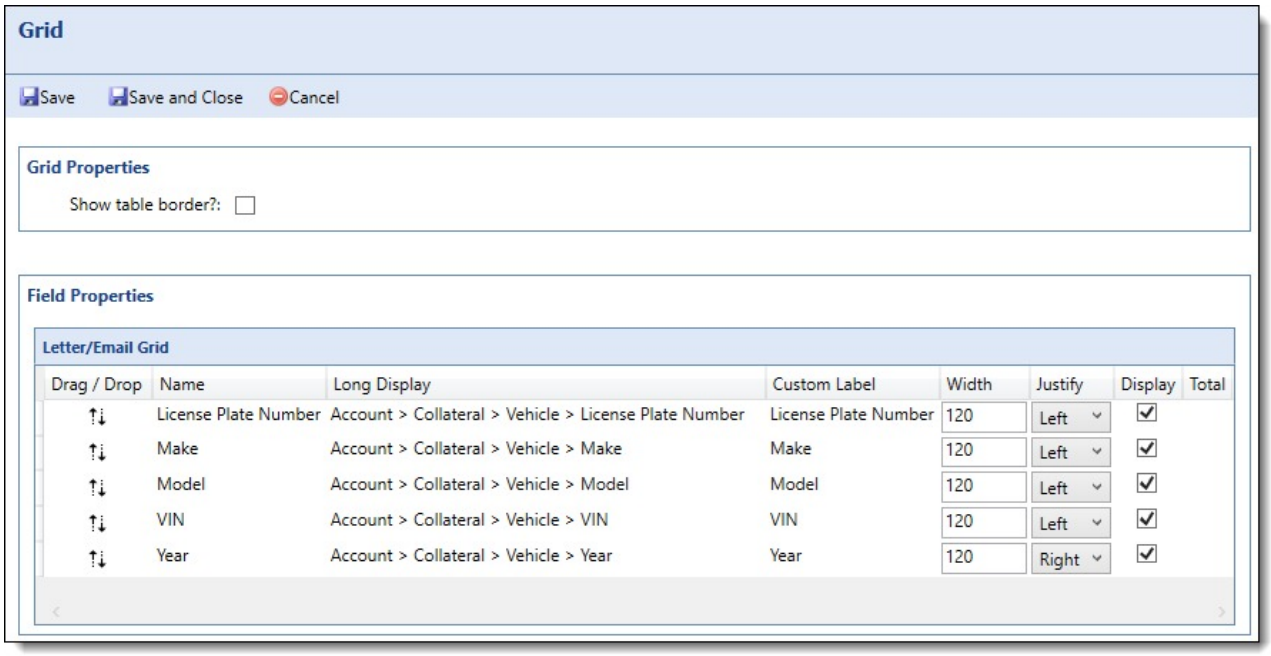
To add a grid:

- Select the desired grid within the Grids tab and click **Insert**.

  > While multiple grids can be added to a letter, the same grid can only be configured to appear in a letter once.

- A window opens to configure the grid and field properties.

  > The fields that appear in each window are determined by the grid selected. Some of the fields displayed in these grids are not available in the field tree. The following example is for the Vehicle Fields grid. Please see Grids Tab within the Fields/Grids section in this topic for an overview of each grid and the default fields that appear within the configuration window.



- Within the Grid Properties section, determine if a table border should display for the grid by selecting the Show Table Border check box. When this check box is selected, a border appears around the grid when the letter is generated.
- Within the Field Properties section, define the properties to appear for each field when the letter is generated.
  - The Name and Long Display columns list the name and location of the field in Temenos Infinity. These columns are not editable.
  - In the Custom Labels column, define the label to appear for each field in the letter.
  - Once the custom labels are defined, determine the width for each individual column and identify if columns should have left, center or right justification.
  - Select or deselect check boxes within the Display column to determine whether or not a field appears in the letter. When the Display check box is selected, the column populates in the grid when the letter is generated.

    > If monetary Amount fields are configured to appear within the letter, the values are rounded using the standard rounding method and are displayed with two decimal places when the letter is generated.

  - A check box displays in the Total column for each Amount field that appears in the grid. Select the check box in the Total column to display a total calculation of each value of the field in the letter.

    > A check box only displays in the Total column for Amount fields. If a field is not an Amount, a blank space appears in the Total column for that field, as shown in the above example.

  - By default, all fields are listed alphabetically within the Letter/Email grid; however, the order of the fields can be modified by clicking within the Drag/Drop column, and then dragging and dropping the field into the desired grid location.
- When all grid and field properties have been defined, click Save to retain the properties. Click Save and Close to retain the values, and return to the Word document.
- The grid is added to the Word document as shown below:

Final Delinquency Notice
«Current_Date»

«Full_Name»
«Address»
«City__State__Zip»

Dear «Full_Name_0»,

We have made several attempts to remind you of your past due payment and several requests to bring your account current. Your loan is now considered severely delinquent. Unless the past due amount of «DQ_Amount» is made within 10 days of the date of this notice (no later than «Current_Date_Plus_10»), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses. This information will be reported to all credit bureau agencies to which our institution subscribes.

Please reference the table below for an overview of your accounts and any associated payment information.

«DQ_Fields»

Thank you,
«User_Name»
AKC Financial

-

> Once a grid has been added, the field and grid properties can be modified by selecting the grid name within the Grids tab and clicking **Edit.**

Add a Barcode

To add a barcode to a letter template:

- Select the check box next an address type for the Undeliverable Mail process.

  > Only one barcode can be added to a letter template; therefore, only one address type can be selected for the Undeliverable Mail process.

- Once an address type is selected, preview the letter to view the placement of the barcode.

  > By default, the barcode placement is left justified within the footer of a letter template. When added to a template, the barcode is not visible within the Word document; therefore, while not required, it is highly recommended that the letter template is previewed after adding a barcode to ensure that the placement of the barcode does not interfere with the footer configured for the template. Please see the Preview Template section in this topic for more information.

Preview Template

After the letter text has been defined and all desired fields/grids have been added, navigate to the Preview section to view how the letter appears when generated.

Within this section, enter the following information to preview a letter template including account, case, and/or person information:

Field	Description
Account #	Enter an account number to generate the letter and populate information for the account and any related account holder(s) into the applicable fields.
Case #	Enter a case number to generate the letter and populate information for the case and any related person(s) into the applicable fields.
SSN/TIN	Enter a SSN/TIN to generate the letter and populate information for the person and any related accounts or cases into the applicable fields.

Once all Preview parameters have been defined, click

to generate the letter.

> The placement of a letter barcode cannot be modified in the Preview; however, the barcode can be moved manually during on-demand letter generation from the Send Letter workflow step.

Information populates within each field configured to appear in the letter template as shown below:

Final Delinquency Notice
05/03/2016

Jake [illegible]

Dear Jake [illegible],

We have made several attempts to remind you of your past due payment and several requests to bring your account current. Your loan is now considered severely delinquent. Unless the past due amount of 1,588.41 is made within 10 days of the date of this notice (no later than 05/13/2016), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses. This information will be reported to all credit bureau agencies to which our institution subscribes.

Please reference the table below for an overview of your accounts and any associated payment information.

Account Number	Account Type	Balance	Late Charges	DQ Amount	Due Date	Payment Amount Due
##1103	Auto loans	$ 18,081.40	$ 79.42	$ 1,588.41	05/13/2016	$ 2,197.30
##1103	Deposit/Savings	$ 10.00	$ 0.00	$ 0.00		$ 0.00

Thank you,
John Doe
AKC Financial

Finalizing a Template within the Template Editor

After the letter content has been previewed and all desired information has been added to the template, click Save within the top of the Template Editor to retain the template configurations.

Once Save is clicked, the Template Editor closes and returns to the Letter Template window to finalize the letter.

Creation or modification of a letter template is not complete until a final save is performed within the Letter Template window. If a final save is not performed within the Letter Template window, any configurations made within the Template Editor are not retained.

Letter Barcode Activation and Scanning Exceptions

Letter barcodes enable financial institutions to automatically flag address information in Temenos Infinity as invalid when a letter is returned in the mail. With this functionality, system administrators are able to easily add a barcode to each letter template in order to automatically identify the letter as undeliverable if it is returned to the financial institution.

Each barcode includes data that is used to identify the address information for the person and object (account or case) associated with the letter; when the letter is returned to the financial institution, the barcode is scanned, and a bad address flag is automatically set for the address of the associated person in Temenos Infinity.

For more information on the barcode functionality, and an overview of how to add a barcode to a letter template, please see the Barcodes section under Template Editor in the Letters and Forms topic of this guide.

With the appropriate permissions assigned, the following pages are available under the Communications folder in System Management to provide system administrators with the ability to activate the Letter Barcode process, as well as manage any barcode scanning exceptions that occur in Temenos Infinity:

- Letter Barcode Activation
- Letter Barcode Scanning Exceptions

In order to have access to the above pages, the following permissions must be set to Change for the applicable User(s) and/or Security Group(s) under the System Management category of the Permissions tab in System Management > Users or System Management > Groups > Security Groups:

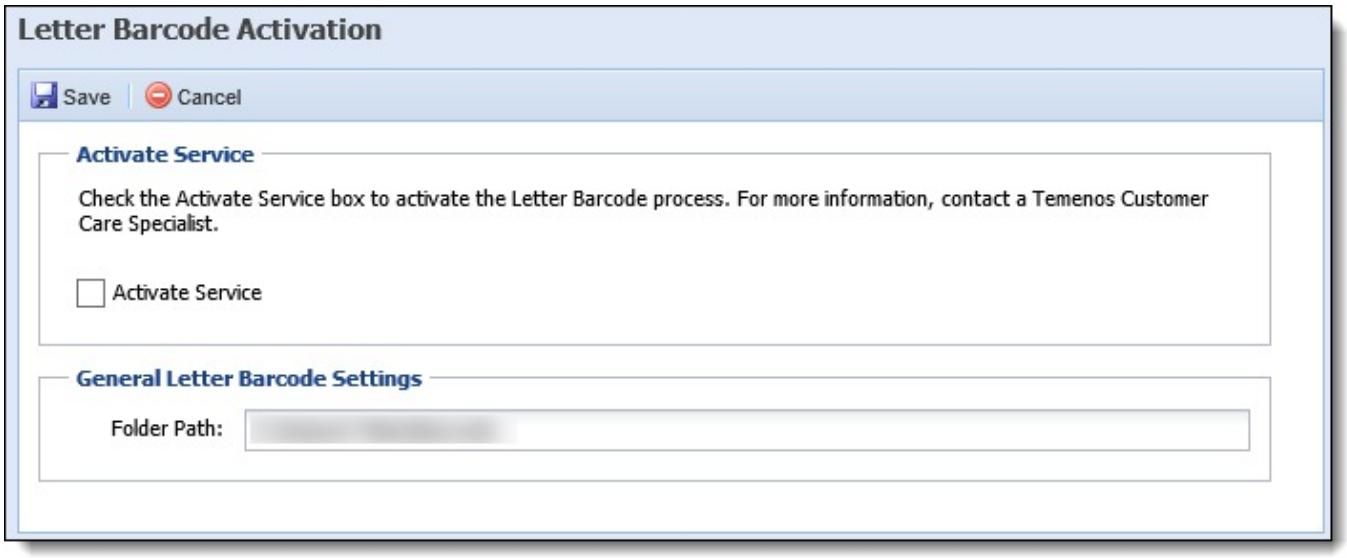
- Letter Barcode Activation
- Letter Barcode Scanning Exceptions

Letter Barcode Activation

In order to use the letter barcode functionality in Temenos Infinity, the BAD ADDRESS BARCODE SCAN process must be activated for the financial institution.

For more information on this process, please see the Letter Barcode Process section in this topic.

The Letter Barcode Activation page in System Management provides administrators with the ability to enable the letter barcode process, and identify the location where files including scanned letters are to be placed for processing.



To activate the letter barcode functionality for an institution:

- Navigate to System Management > Communication > Letter Barcode Activation.
- Select the **Activate Service** check box.
- Within the General Letter Barcode Settings, enter the folder path where the files including scanned letters are to be placed for processing by the BAD ADDRESS BARCODE SCAN process. This field identifies the location to which scanned images of returned letters are to be uploaded by the financial institution.
- Once the letter barcode process is activated, and a folder path location is defined, click to retain the settings.

  It is recommended to ensure that the value entered for the folder path is accurate prior to saving the screen. The system does not validate this location upon saving the Letter Barcode Activation page, and the BAD ADDRESS BARCODE SCAN process will fail if the location specified for the folder path is not valid.

Letter Barcode Process

For a barcode to be processed, institutions must upload a scanned image of each returned letter to the folder path location identified on the Letter Barcode Activation page.

The letter barcode process only supports the following file formats. If a document is not uploaded in one of the below formats, the process cannot interpret the barcode, and the document will be added to the Letter Barcode Scanning Exceptions page in System Management for manual processing:

- .bmp
- .gif
- .jpg
- .png
- .tiff

For more information on exception documents, please see the Letter Barcode Scanning Exceptions section in this topic.

When the Letter Barcode functionality is active for an institution, the BAD ADDRESS BARCODE SCAN process runs each night to review the folder path location, and read the barcode on each letter in the directory. By default, the BAD ADDRESS BARCODE SCAN process is set to run nightly for each institution; however, if desired, the run time

for the process can be modified by a Temenos Customer Care or Professional Services Representative.

Each letter barcode includes specific identifying data elements that enable the BAD ADDRESS BARCODE SCAN process to associate the letter with a person and object (account or case) in Temenos Infinity, and determine the next actions to be taken for the letter.

> For an overview of the information contained in each barcode, please see the Barcodes section under Template Editor in the Letters and Forms topic of this guide.

If a barcode is unable to read, the document is added to the Letter Barcode Scanning Exceptions page in System Management. When the BAD ADDRESS BARCODE SCAN process is able to read a barcode, the process automatically performs the following actions for the undeliverable mail:

- The document is removed from the folder path location and attached to the associated account or case. The document can be viewed within the Account Documents screen.

  > Once removed from the folder path location, the document is placed in the share\documents folder on the institution's server. If attached to an account, the document can be viewed within the Account Documents screen in the workspace. If attached to a case, the document can be viewed within the Case Documents screen. For more information, please see the Account Documents or Case Documents screen topic in the User Guide.

- The NoMailFlag and BadAddressFlag are set to true for the address record in the Core.Address database table.

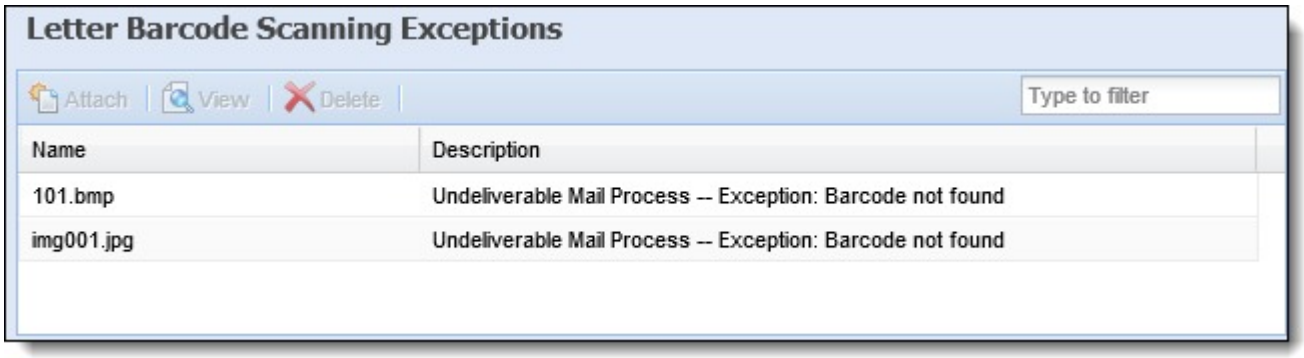
  > The address for which the The NoMailFlag and BadAddressFlag are set is determined by the Undeliverable Mail option configured for the template's barcode. This option is configured within the Barcodes tab of the Letter Template Editor. For more information, please see the Barcodes section under Template Editor in the Letters and Forms topic of this guide.

> Upon completion of the BAD ADDRESS BARCODE SCAN process, all documents are removed from the folder path location, being attached to the associated account, or added to the Letter Barcode Scanning Exceptions page.

Letter Barcode Scanning Exceptions

The Letter Barcode Scanning Exceptions page in System Management (System Management > Communication > Letter Barcode Scanning Exceptions) allows administrators to not only view exception documents, but also manually attach the documents to the applicable account or case. When one of the following exceptions occurs, and a letter barcode is unable to be read by the BAD ADDRESS BARCODE SCAN process, the document is removed from the folder path location, and added to the Letter Barcode Scanning Exceptions page:

- Unsupported image format
- Barcode not found
- Could not determine associated account



The grid within this page displays the following columns of information for each exception document that is unable to complete the BAD ADDRESS BARCODE SCAN process:

Column	Description
Name	Displays the name of the exception document in the following format: <document name>.<extension>.
Description	Displays the name of the process that the document failed to complete, and the exception that prevented the document from completing the process.

Using of the following buttons in the top of the Letter Barcode Scanning Exceptions page, administrators are able to manually attach the document to the applicable account, view the document, or remove the document from the system:

Function	Description
Attach	Enables the ability to manually attach an exception document to the applicable account or case in Temenos Infinity.
View	Enables the ability to view the exception document.
Delete	Enables a user to remove an exception document from Temenos Infinity.

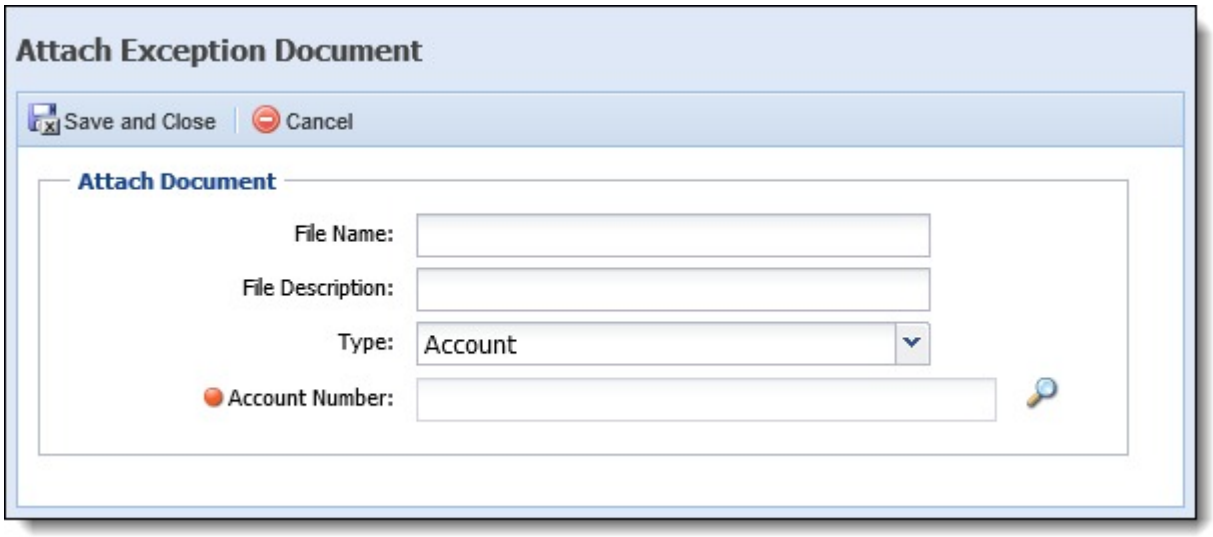
Reference the following section for an overview of the steps to take to attach, view, or delete exception documents within the Letter Barcode Scanning Exceptions page.

Attaching Exception Documents

The Attach function allows administrators to manually attach a document to an account or case when the BAD ADDRESS BARCODE SCAN process is unable to do so.

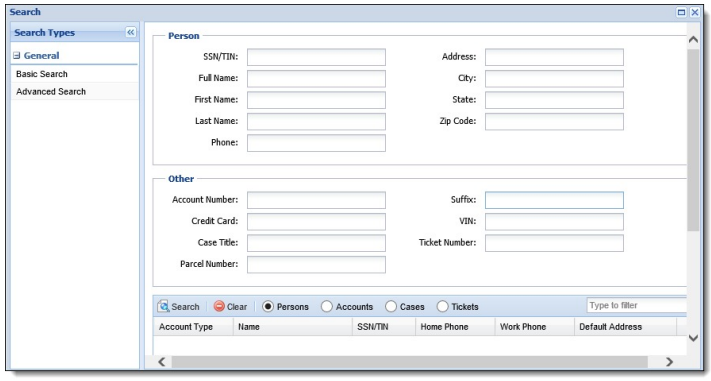
To attach an exception document:

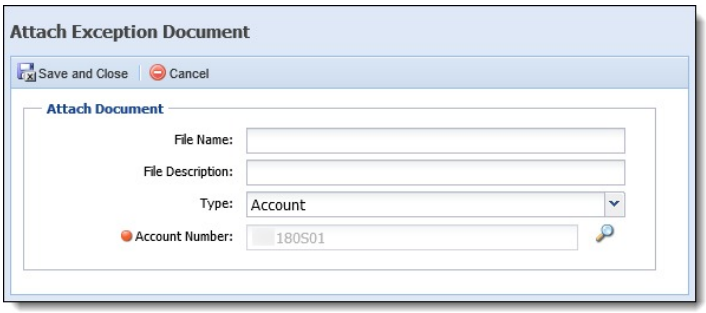
- Double-click the desired document within the grid or highlight the document and click Attach
- An Attach Exception Document window appears.



- Within the window, define values for the following fields to attach the document to an account or case in Temenos Infinity:

Field	Description
File Name	Enter the name of the document being attached to the account or case.
File Description	Enter a description of the document being attached to the account or case.
Type	Select Account or Case from the drop-down to identify the object to which the document is being attached. This field defaults to Account.

Account Number/Case Number	Click to locate the account number or case number for the document attachment using the Search feature. The title of this field, and the value to be entered, is determined by the option selected for the Type. For example, when the Type is set to Account, the title of this field appears as Account Number. When the Type is set to Case, this field appears as Case Number. Reference the Number Search section below for an overview of how to add the desired account number or case number within the Attach Exception Document window. ▸ Number Search The provides the ability to perform a basic or advanced search using the Search feature to locate the desired account number or case number to associate with the document attachment. To use the Search feature to populate an account number or case number in the Attach Exception Document window: ○ Click to open the Search window.  ○ By default, the Person radio button is selected within the top of the results grid. To search for the desired account or case, select the Account or Case radio button. ○ Enter the desired Search parameters, and click Search to populate the results within the grid. ○ Once the desired account or case has been located within the grid, double-click the record. ○ The number populates as a read-only value for the Account or Case Number field in the Attach Exception Document window.

Viewing Exception Documents

The View function allows administrators to easily review an exception document before it is attached to an account.

To view an exception document:

- Highlight the desired document within the grid and click View.
- A prompt appears at the bottom of the screen to confirm if the document should be opened, saved, or canceled. Click the button for the desired function.
- When a document is opened, an image of the document appears on the screen.
- Once the exception document has been reviewed, close the document to return to the Letter Barcode Scanning Exceptions page.

Deleting Exception Documents

The Delete function allows administrators to remove an exception document from Temenos Infinity.

To delete an exception document:

- Highlight the desired document within the grid and click Delete.
- A message appears to confirm that the exception document should be deleted.
- Click **Yes** to remove the document or **No** to maintain the document and return to the Letter Barcode Scanning Exceptions page.
- Once Yes is selected, the document is removed from the Letter Barcode Scanning Exceptions grid.

Letters and Forms Archive

The Letters and Forms Archive screen enables financial institutions to easily configure and manage the properties of letters and forms in preparation for the archiving process. Accumulating letters can build up space in a server if the financial institution does not remove them. This functionality supports archive capability for these collection documents.

> Letters must be both archived and removed in order to free space on a server.

Navigate to System Management > Communication > Letters & Forms Archive to launch and manage the letters and forms archive process.

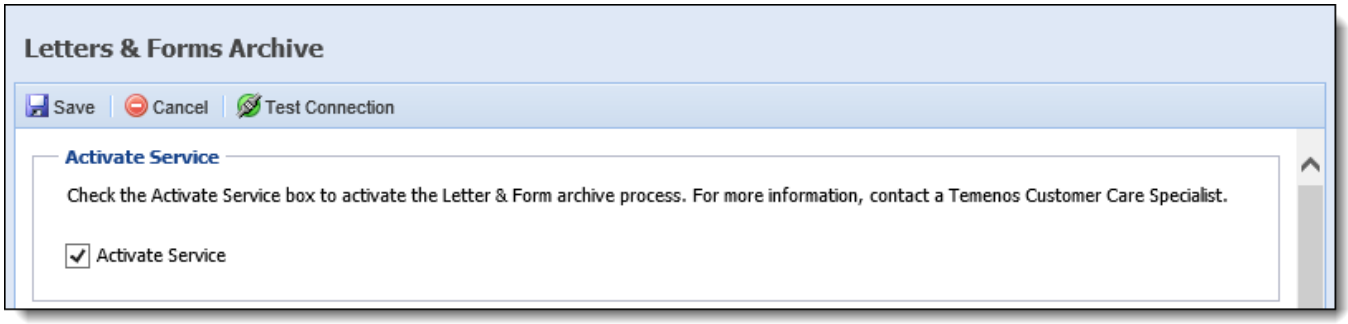
> In order to access this screen, the Letters and Forms Archive permission must be set to Change for the User and/or Security Group. This permission appears in the System Management category of the Permissions tab in System Management > Users and System Management > Groups > Security Groups.

Attributes

The Letters & Forms Archive screen contains attributes which are organized into four different sections. The defined attributes provide administrators with the ability to map the parameters of the archive documents, with fields and grids that populate with information for applicable file settings.

Activate Service

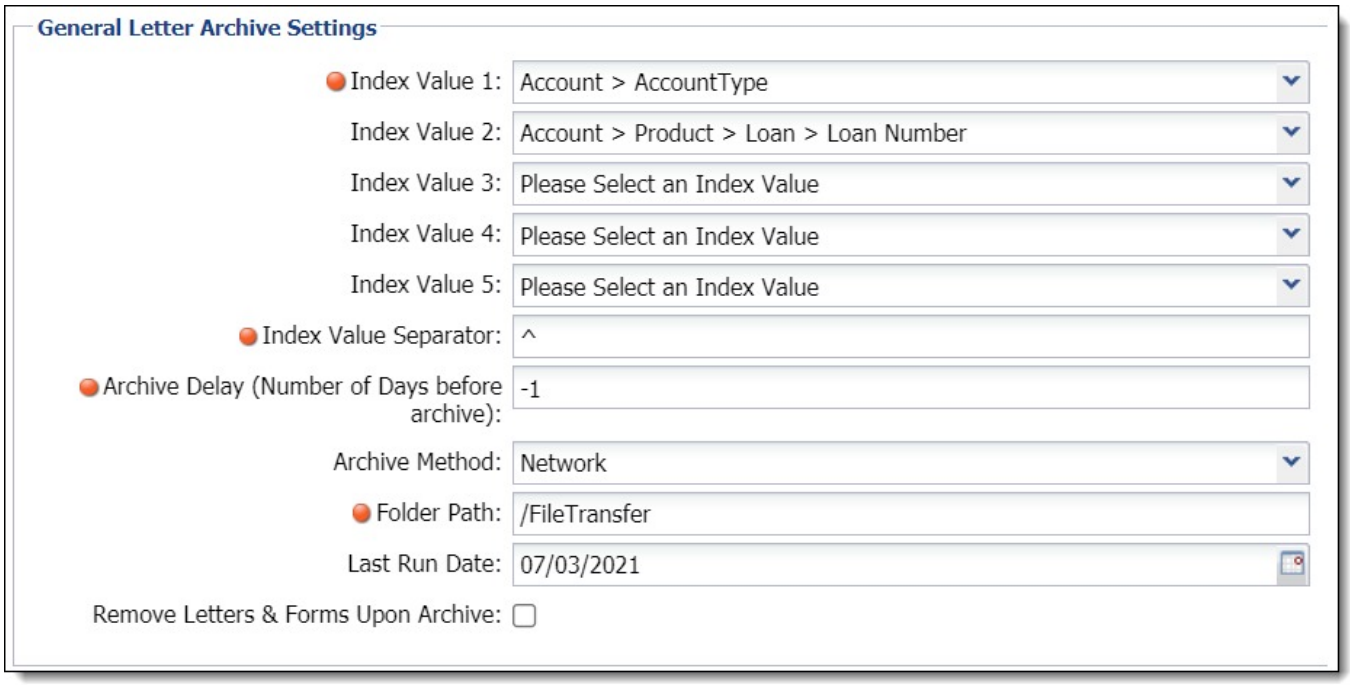
To active the Letters & Forms Archive process, the Activate Service check box must be selected.



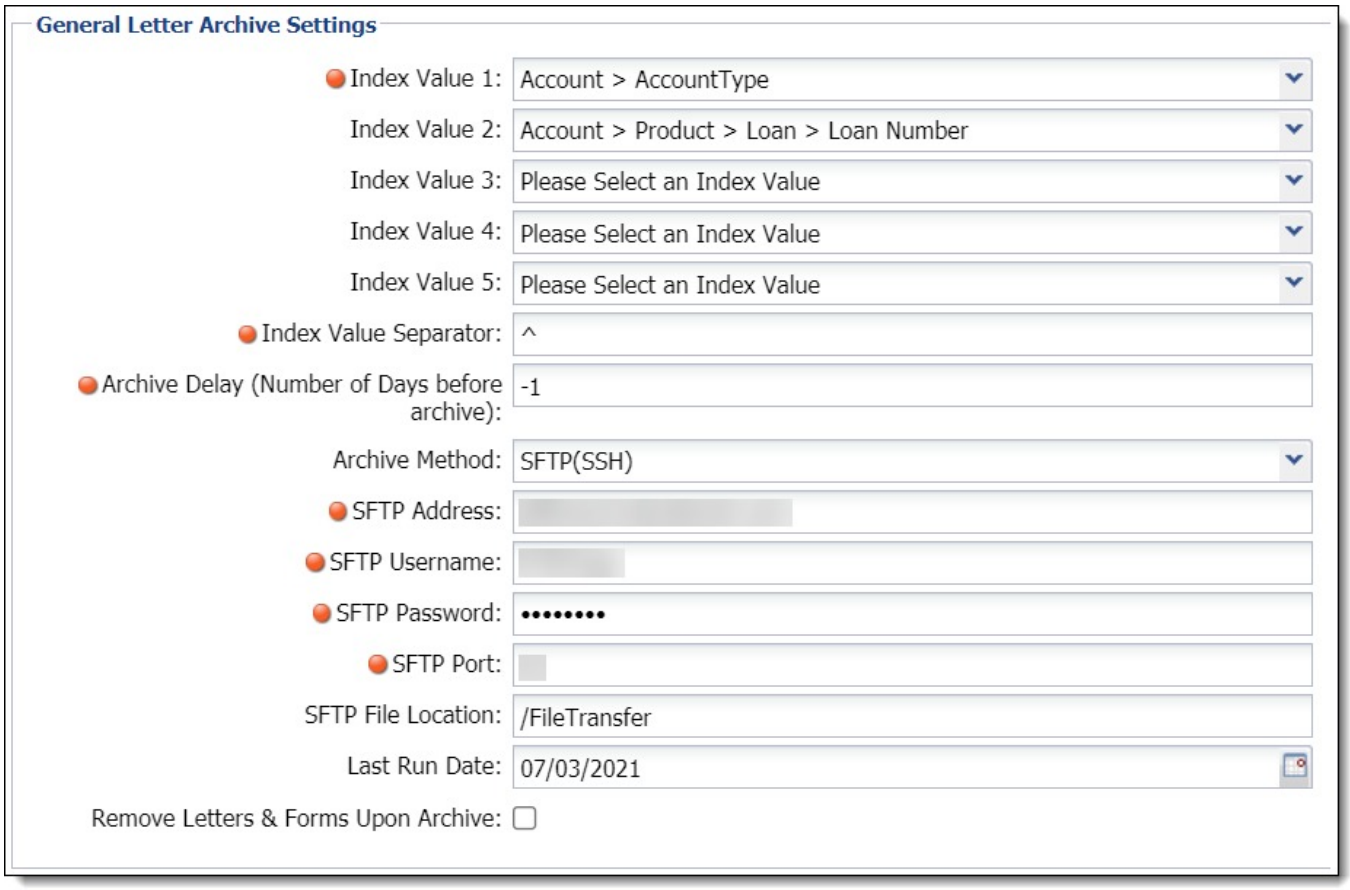
General Letter Archive Settings

The General Letter Archive Settings section enables the administrator to define the naming convention for the archived documents. Archived files are appended with the designated index values and index value separators. When a letter is archived, these values populate with the value of the unique letter fields indicated by the index values so administrators may easily locate individual letters that have been archived.

When the Archive Method is selected as Network, the General Letter Archive Settings section appears as shown below:



When the Archive Method is selected as SFTP, the General Letter Archive Settings section appears as shown below:



The following attributes are defined within the General Letter Archive Settings section:

Field	Description
Index Value 1	Select an option from the drop-down to identify the applicable Temenos field used to index the archive file when the process is run. This is a required field.
Index Values 2-5	Select an option from the drop-down to identify other applicable Temenos fields used to index the archive file when the process is run. Unlike Index Value 1, Index Values 2 through 5 are optional and enable greater customization ability. For example, if Index Value 1 is **Account > Account Number**, Index Value 2 is **Account > Product > Loan > Loan Number**, and **a caret (^)** is entered as the Index Value Separator, the archive file displays as **101237^1^^^^138.docx**. The last number refers to the LetterID from the database.
Index Value Separator	Enter an underscore (_) or caret (^) delimiter to separate the index values. This is a required field. Only one delimiter may be used.

Archive Delay	Enter the period of time in days that must lapse after the letter was created before the archive process begins. This is a required field. This must be a whole number that does not exceed three digits in length.
Archive Method	Select one of the following options to transfer the archived letters: • Network - File is transferred to the network location identified within the Folder Path parameter. • FTPS - File is transferred to a FTPS site. • SFTP - File is transferred to SFTP site.
Folder Path	If Network is the selected Transfer Method, enter the folder path location where the archived letters are to be placed. This is a required field that only displays when the Transfer Method is set to Network.
SFTP / FTPS Address	If files are being transferred to an FTPS / SFTP site, enter the FTPS / SFTP Server Name. This is a required field that only appears when the Transfer Method is set to FTPS / SFTP.
SFTP / FTPS Username	Enter the username required to connect to the FTPS / SFTP site. This is a required field that only appears when the Transfer Method is set to FTPS / SFTP.
SFTP / FTPS Password	Enter the password used to connect to the FTPS / SFTP site. This is a required field that only displays when the Transfer Method is set to FTPS / SFTP.
SFTP / FTPS Port	Enter the Port number used to transmit the index file via FTPS / SFTP. This is a required field that only displays when the Transfer Method is set to FTPS / SFTP.
SFTP / FTPS Location	Enter the location, where the archived letters are to placed in the SFTP / FTPS server.
Folder Path	Enter the file path that identifies the unique system location where the archived files are stored. This is a required field. A successful connection to the folder path must be completed before parameters can be saved.
Last Run Date	Enter or click on the calendar tool to select the last date in which this process was executed successfully. The Last Run Date is typically set by the Letters and Forms Archive Process, but this parameter can be set back to re-run an archive if desired.

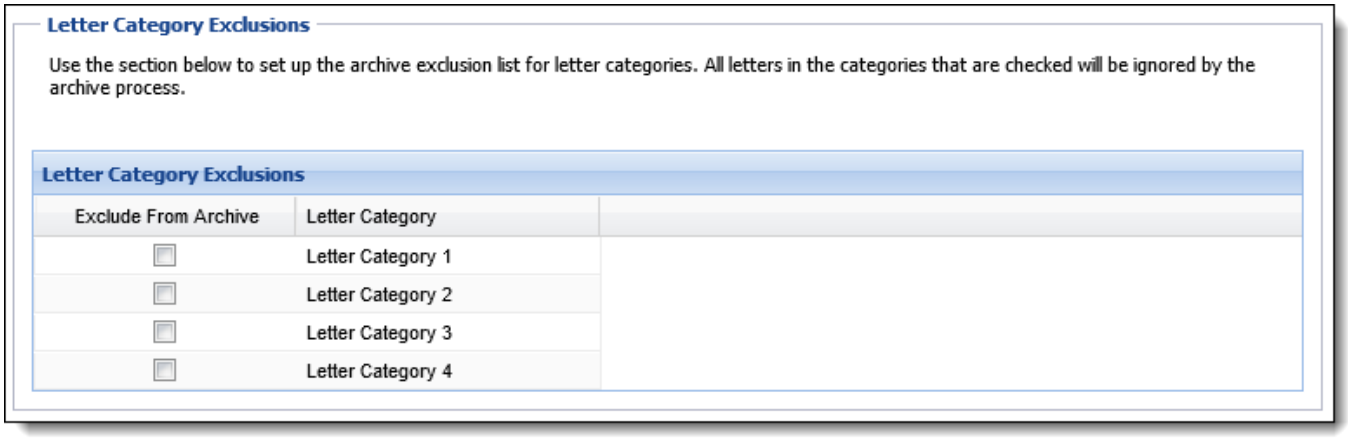
Remove Letters & Forms Upon Archive	Select the check box to determine whether the letter is available for viewing in the Letter History screen upon successful completion of the archive process. Letters that have been **archived but not removed** are still viewable within the Letter History screen. Letters that have been **archived and removed** are no longer able to be viewed within the Letter History screen. Letters must be both **archived and removed** in order to free space on a server.

The Letters and Forms Archiving process does not support a separate index file. Each letter or form is archived as a separate file with its own identifying filename details.

Letter Category Exclusions

The Letter Category Exclusions section establishes the export exclusion list for letter categories. During the archive process, letters that fall under letter categories identified in this grid are not archived.

To exclude all letters within a Letter Category, select the Exclude From Archive check box. To exclude an individual letter, see the Letter Exclusions section below. It is not necessary to Exclude both the individual letter and its corresponding Letter Category.



The grid within the Letter Category Exclusions section displays the following columns of information:

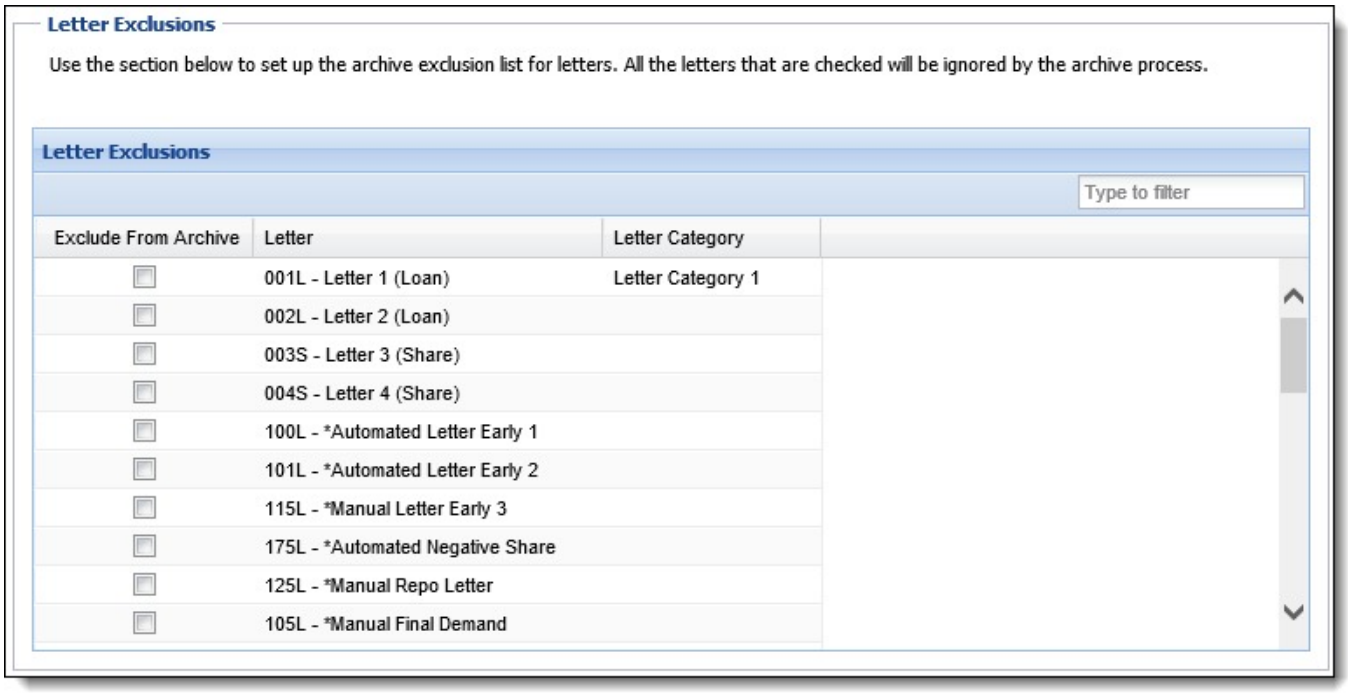
Column	Description
Exclude From Archive	Select this check box to exclude the letter category from the archive.
Letter Category	Displays the category of the letter. The Letter Category field populates with the values of the Letter Category lookup defined in System Management > Field Configurations.

Letter Exclusions

The Letter Exclusions section establishes the export exclusion list for individual letters configured in System

Management > Communication > Letters & Forms. During the archive process, letters that are identified in this grid are not archived.

> To exclude an individual letter, select the Exclude From Archive check box. To exclude all letters with a Letter Category, see the Letter Category Exclusions section above. It is not necessary to Exclude both the individual letter and its corresponding Letter Category.



The grid within the letter exclusions section displays the following columns of information:

Column	Description
Exclude From Archive	Select this check box to exclude the letter from the archive.
Letter	Displays the name of the letter. The letters displayed here are configured in System Management > Communication > Letters & Forms.
Letter Category	Displays the category in which the letter is designated. The Letter Category field populates with the values of the Letter Category lookup defined in System Management > Field Configurations.

Actions

Once the archive parameters are set and the administrator is ready to begin the Letters and Forms Archive Process, it is necessary to validate that the folder path indicated in the General Letter Archive Settings section is valid and accessible.

Click Test Connection to validate the folder path. If the path is invalid, an error message is received. If the path is valid, a success message is returned.

Once all attributes have been defined and the folder path validated, click Save to retain the archive configuration.

By default, the Letters & Forms Archive Process runs at 10:00PM on a daily basis. Archived documents are saved in the .docx file format.

For more information on configuring the start time for the Letters & Forms Archive Process, please see the Processes topic of the Server Manager Technical Guide. For more information on configuring the archive schedule, contact a Temenos Customer Care Specialist.

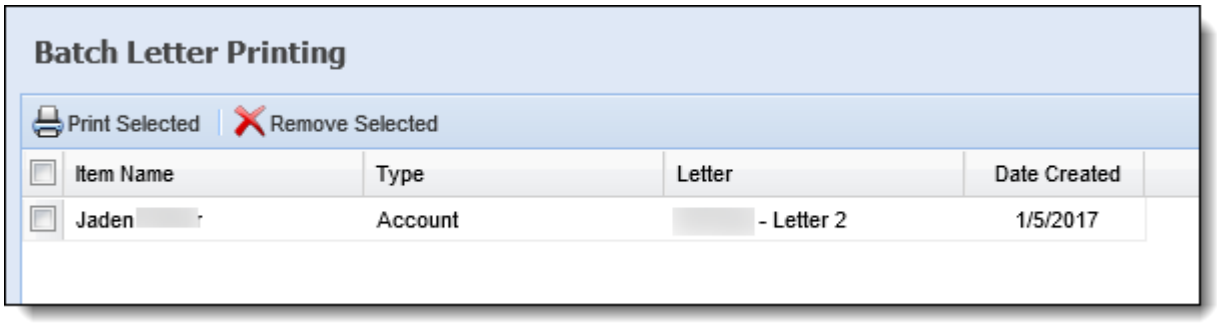
Batch Letter Printing

There are three methods of Letter Generation supported in Temenos Infinity: On Demand, Batch Print, and Outsource.

Letters generated for Batch Printing accumulate in a queue and must be printed manually. The Batch Letter Printing page in System Management (System Management > Communication > Batch Letter Printing) displays a list of the letters queued for printing, and provide the ability to print the letters.

There are two reasons why generated letters appear in the Batch Letter Printing screen:

1. A letter is sent during a Workflow and the Generation Type of the template has been set to Batch Print.
2. A letter is generated via an Automated Queue.



The following columns display in the Batch Letter Printing page:

Column	Description
Item Name	Displays the name of the account holder, or case number for which the letter was generated.
Type	Displays the level to which the letter is associated (Account, Case).
Letter	Displays the title of the letter to be printed.
Date Created	Displays the date the letter was created for the account or case.

Printing Letters

- Click the check box next to the Type column to select the letter(s) to print. Select the top check box to select all of the letters at once.
- Click **Print Selected**.
- A screen appears with a progress bar that displays the status of the process. This screen includes two lines of data: one with the number of letters processed and the amount of time it took to complete (in seconds), and a second line that includes the number of letters skipped due to a missing template.
- Once the process is complete, a message appears asking to verify that all letters have printed and uploaded to the server successfully.

> If the batch includes one or more letters without a template, a message is received to alert administrators to confirm that all letters have been downloaded to the system. If all selected letters are missing templates, a message is received to inform that all letters have been skipped due to missing templates.

- Click **OK** to verify that the operation completed successfully, and the letters should be removed from the queue. Click **Cancel** if the letters have not printed successfully.
  - If **OK** is clicked, a message appears indicating the printed letters have been removed from the queue. The Batch Letter Printing page refreshes automatically removing the letter from the page.
  - If **Cancel** is clicked, a message appears indicating the letters have been uploaded to the server, but were not cleared from the queue. If the documents did not print successfully, they can be printed again through the Batch Letter Printing page.

If using Batch Letter Printing in an Edge or Chrome browser, a prompt appears to download a PDF file to print the letters. When using Internet Explorer, a pop-up window opens to print the letters.

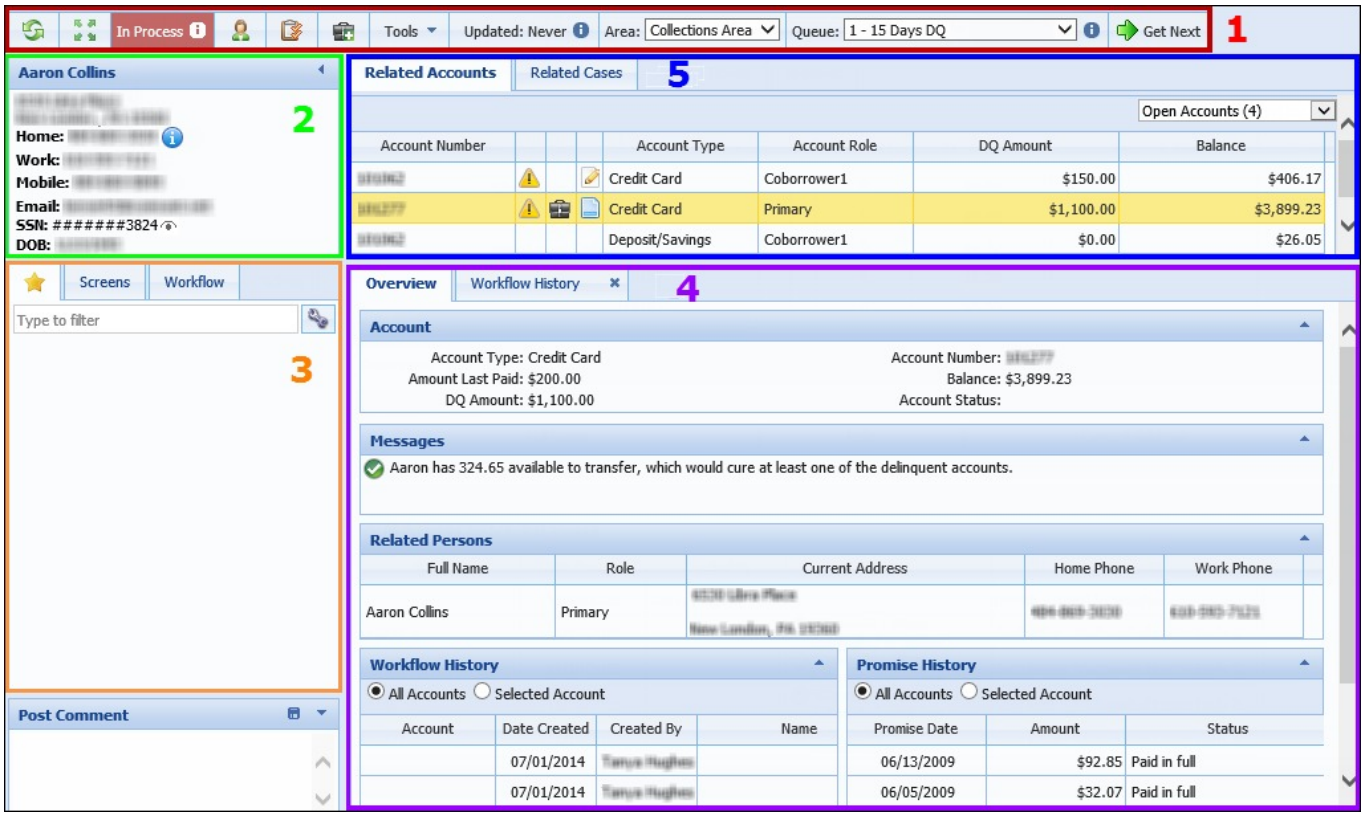
> Within the Letter History screen, the letter has a status of “Pending” when it is in the batch letter printing queue. End users are not able to open/view the letter until it is printed. Once the letter is printed, it has a status of “Available.”

Removing Letters

- Click within the check box next to the Item Name column to select the letter(s) that should be removed.
- Click **Remove Selected**.
- A confirmation message appears. Click **Yes** to delete the letter(s). Click **Cancel** to return to the Batch Letter Printing page without deleting the selected letter(s).

Workspace Overview

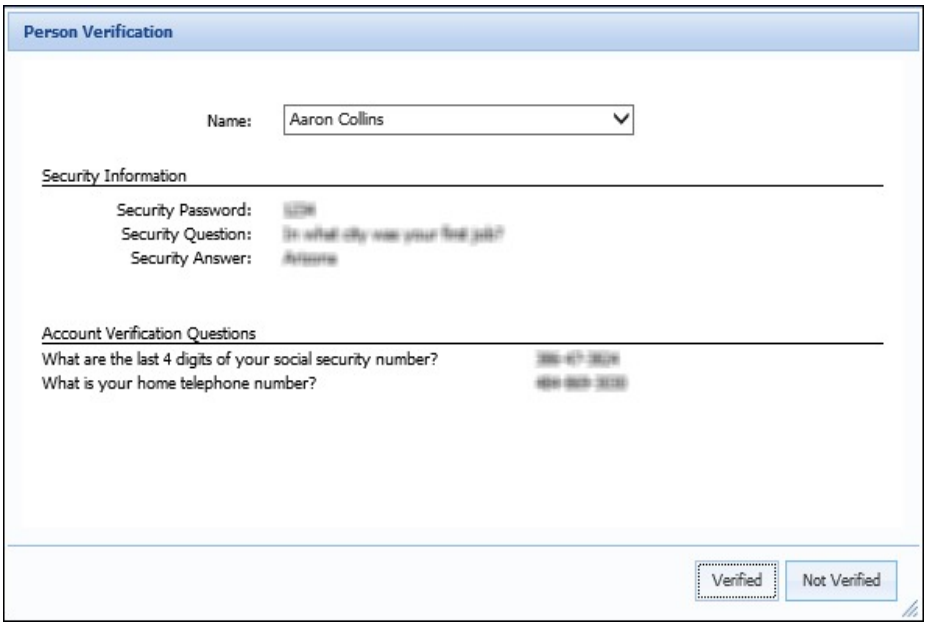
This section provides an overview of the configurable areas within the Person workspace. Many areas of the workspace can be configured by administrators to display institution-specific information and this section serves as a guide to where those configurations can be made.



1- Workspace Toolbar

The workspace toolbar is located on the top of all workspaces. Below is an overview of the Toolbar icons that can be configured by system administrators:

Icon	Description

	When the **Person Verification** functionality is active, a person verification screen displays upon opening a person workspace through a Search. This screen contains security information used to verify a person's identity. If configured to appear on the workspace toolbar, users can click this icon to turn Person Verification messages on or off for their user.  The Person Verification icon is configured to appear on the workspace toolbar in System Management > Areas. The Security Information that displays within the Person Verification message can also be configured by administrators. For additional information, please see the Areas topic within this Guide.
	The Queue Contents icon opens the list of accounts in the queue and provides access to other accounts in the current queue. This feature is controlled by the system administrator in System Management > Areas. If no queue is selected, the button is disabled. For additional information on how to create and manage Queues, please see the Collection Queues topic within this guide.
	The Create New Case icon can be selected by users to create a new case for the person in the workspace. The ability to use this feature is a security permission set by the system administrator on the Permissions tab in System Management > Users and System Management > Groups > Security Groups. Please see the Users and Security Group topics within this Guide for additional information regarding User Permissions. To learn more about Case Customization, please see the Case Admin Introduction topic within this guide.

Tools	The Tools drop-down provides users with quick links to external websites. The websites that appear within this drop-down are defined by system administrators in System Management > Hyperlinks. Queue Analyzer, Credit Reporting and Skip Trace functionality are also available in this drop-down.
Area: Collections Area	The Area drop-down identifies the area being worked, as well as other areas that are available to each user. The Areas available to each user are assigned by the system administrator in System Management > Areas. Areas are also assigned to individual users in System Management > Users and System Management > Groups > Security Group. For additional information on Area configuration, please see the Areas topic within this guide.
Queue: Credit Card Accounts	The Queue Selector drop-down displays the name of the queue being worked and can be selected by users to see a list of available queues as well as navigate to other queues. The Queues available to each user are assigned by a system administrator in System Management > Collections > Collection Queues. The Queue Selector drop-down is configured to appear on the workspace toolbar in System Management > Areas. It is here that system administrators also define whether an information icon appears within this section to display the number of persons and accounts remaining to be worked in that queue.
Get Next	The **Get Next button** allows the user to advance to the next person in the queue. This feature is controlled by the system administrator in System Management > Areas. If no queue is selected, the button is disabled. System administrators can configure icons to appear in a column within the **Related Accounts** panel to identify the accounts that must be worked before selecting Get Next. For more information on these icons, please see the Top Area Screen section of this topic.

2- Person Summary Panel

The Person Summary Panel is designed to provide a quick, high-level overview of a person. The information that appears within the top of this box is system-defined, and cannot be configured by system administrators.

Administrators can configure additional fields and/or aggregated information to appear below the system-defined data to provide quick access to important information for the person in context beyond demographics, such as the total number of promises and/or delinquent accounts for the person, if a case exists for the person, or if the person is an employee.

> When the real-time refresh process runs, the Person Summary panel is automatically updated to display the most up to date information from the core for the person.

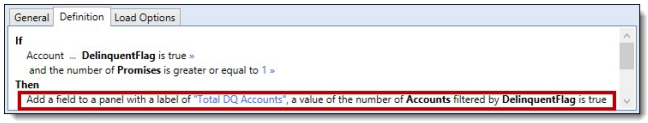
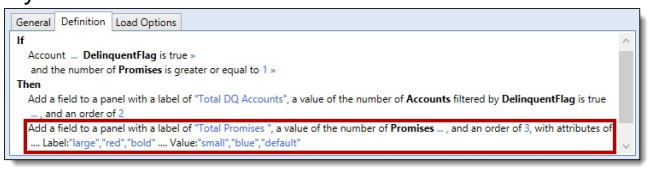
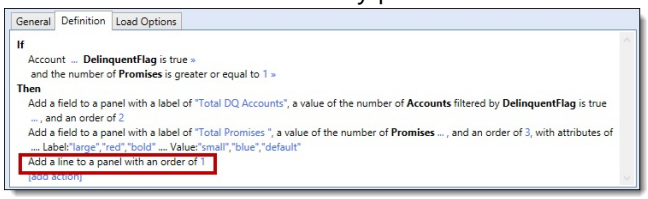
By configuring Presentation rules in System Management > Collections > Rules Management and assigning them to this area of the workspace in System Management > Areas, administrators can eliminate the need for users to

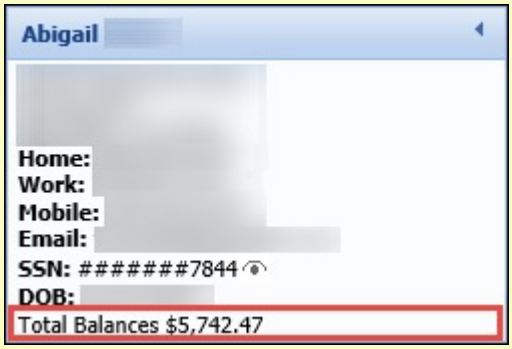
search for information, and increase the time spent on collections efforts.

Rule Configuration

> In order to assign rules to the Person Summary Panel, the ability to author Business Rules must be enabled for your institution. For more information about how to enable this functionality, please contact your Temenos Customer Care Representative.

Rules for the Person Summary Panel are configured in System Management > Collections > Rules Management. Use the following table to assist with configuring business rules to execute within the Person Summary panel:

Action Template	What it Does	Category Selection
add a field to a panel	Adds a field to the Person Summary panel- label, order 	Presentation
add a field to a panel with attributes	Adds a field to the Person Summary panel- label, order and then attributes include size, color, and style 	Presentation
add a line to a panel	Adds a line to Person Summary panel 	Presentation

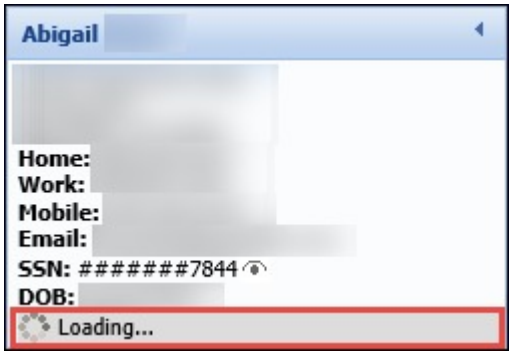
> In order to produce the desired results, select the appropriate entity when authoring a rule. The entity **Root.Person** is the recommended entity for the Person Summary panel, but does not reflect the only entity choice. The entity **Person.Accounts** can be selected to execute the rule on all the accounts related to the person in context and display new fields and/or aggregated information in the Person Summary for each account. The example above was written under the Root.Person entity to populate information within the Person Summary panel as shown below:
>
> 
>

All Rules created under the Presentation category in Rules Manager are available to be assigned to the Person Summary panel from the Rules tab on the Area Configuration screen in System Management > Areas. To learn more about Area configuration, please see the Areas topic within this guide.

> An unlimited number of rules can be configured to appear in the Workspace Person Summary; however, while the height of the Person Summary expands to accommodate these rules, a scroll bar does not appear. This can significantly reduce the amount of space within the Left Navigation Panel. Therefore, it is recommended to be mindful of the number of rules assigned to execute within the Person Summary in order effectively use the Favorites, Screens, Workflow, and Post Comment functionality in the workspace.

When rules are assigned to the Person Summary panel, a loading message displays within the panel while the assigned rules execute:

> When data is updated within the Person Summary panel during the real-time refresh process, any Presentation rules assigned to the area automatically re-run to display the most up to date information for the person.



Please see the Rule Authoring topic of this Guide to learn more about authoring rules for the Person Summary panel.

3- Left Navigation Panel

The **Left Navigation Panel** displays three tabs: **Favorites**, **Screens**, and **Workflows**.

Tab	Description
Favorites	Contains a list of commonly used screens and workflows. This tab is managed by users by clicking the icon.
Screens	Contains a list of screens available to the user. These screens are created and managed by the system administrator in System Management > Screens and are configured to appear within this tab in System Management > Areas.
Workflow	Contains a list of available workflows. These workflows are created and managed by the system administrator in System Management > Workflow > Workflows and are configured to appear within this tab in System Management > Areas.

4- Overview Screen

The **Overview Screen** appears in the lower section of the workspace and is used to display information on the person in context, as well as the account or case in context.

The Overview screen is a Person screen created by the system administrator in System Management > Screens where it can be configured to include Person, Account or Case panels that populate to display information regarding the specific account or case type in context.

Once this screen is created, administrators can map it to the overview tab section of the workspace while configuring an area in System Management > Areas.

5- Top Area Screen

The top area screen appears within the top section of the workspace and displays all account and case information for the person in context when configured to include the Related Accounts and Related Cases Panels.

For these panels to display, system administrators must configure a Person screen to include the Related Accounts and Related Cases panels in System Management> Screens.

When configuring the Related Accounts panel, there are fields that can be added to display an icon within a column of the panel. These icons alert users to important account information, such as which queue an account is in, or if the account is associated with an open case. Hovering over the icon immediately displays the account information in the workspace. Reference the table below to assist with identifying these fields, the icon that displays when the field is configured to appear in the panel, a description of the icon, and the information that appears as the icon is hovered over in the workspace:

Field Name	Icon	Description	Tooltip
Delinquency Indicator		The account is delinquent. System administrators are also provided with the ability to display delinquent accounts with different text and background color in the Related Accounts grid. This configuration can be made using the DQ Accounts Style parameter in the General tab of the configuration window for the Related Accounts Panel in System Management > Screens. For more information, please see the General section under Panels in the Screens topic of this guide.	This account is delinquent.
Queue Info	Empty Box	The account is not in a queue.	No message displays.
		The account is in the current queue.	This account is in the queue being worked.
		The account is in the current queue and must be worked before selecting Get Next.	This account is in the queue being worked and must be worked before getting next.
		The account is in a different queue.	This account is in the [name of queue] queue.
		The account is in a different queue and must be worked before selecting Get Next.	This account is in the [name of queue] queue and must be worked before getting next.

Account Case Indicator		The account is associated with one or more open cases.	Case Number(s) and Case Type(s).

> The functionality of Queue Information icon and icon is determined by the configuration of the **Which accounts must be worked before allowing Get Next** setting for the area in System Management > Areas. For more information on Area configuration, click here.

Once the Person screen is created, administrators can map it to the top area section of the workspace in System Management > Areas.

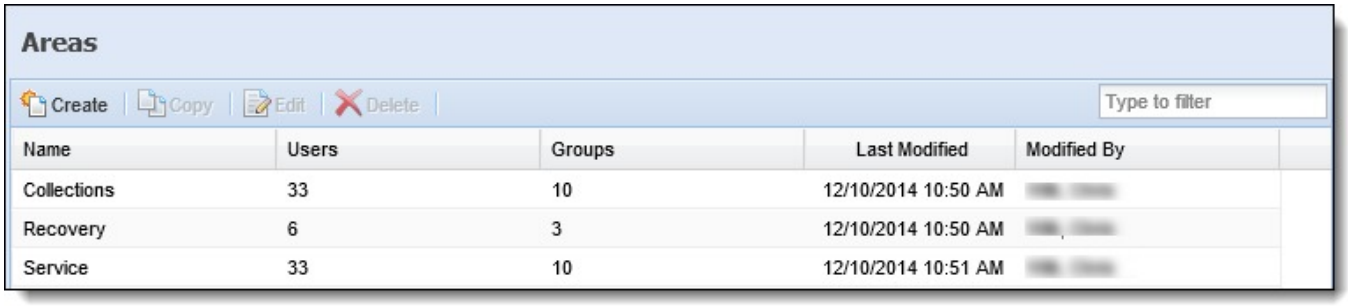
> For more information on each of these areas of the workspace, please see their respective sections within the Person Workspace topic in the User Guide.

Areas

Workspaces are primarily configured through the use of Areas. Areas control the look, feel, and functionality of the workspace. Configuring different Areas is especially useful if different departments or functional areas work in Temenos Infinity.

For example, if an organization has a back office processing department, the person verification functionality might not be necessary for them since the department is not making direct contact with account holders. If an organization uses the Service module, a different overview screen might be necessary than what is used for collectors.

Administrators can manage Areas by navigating to System Management > Areas.

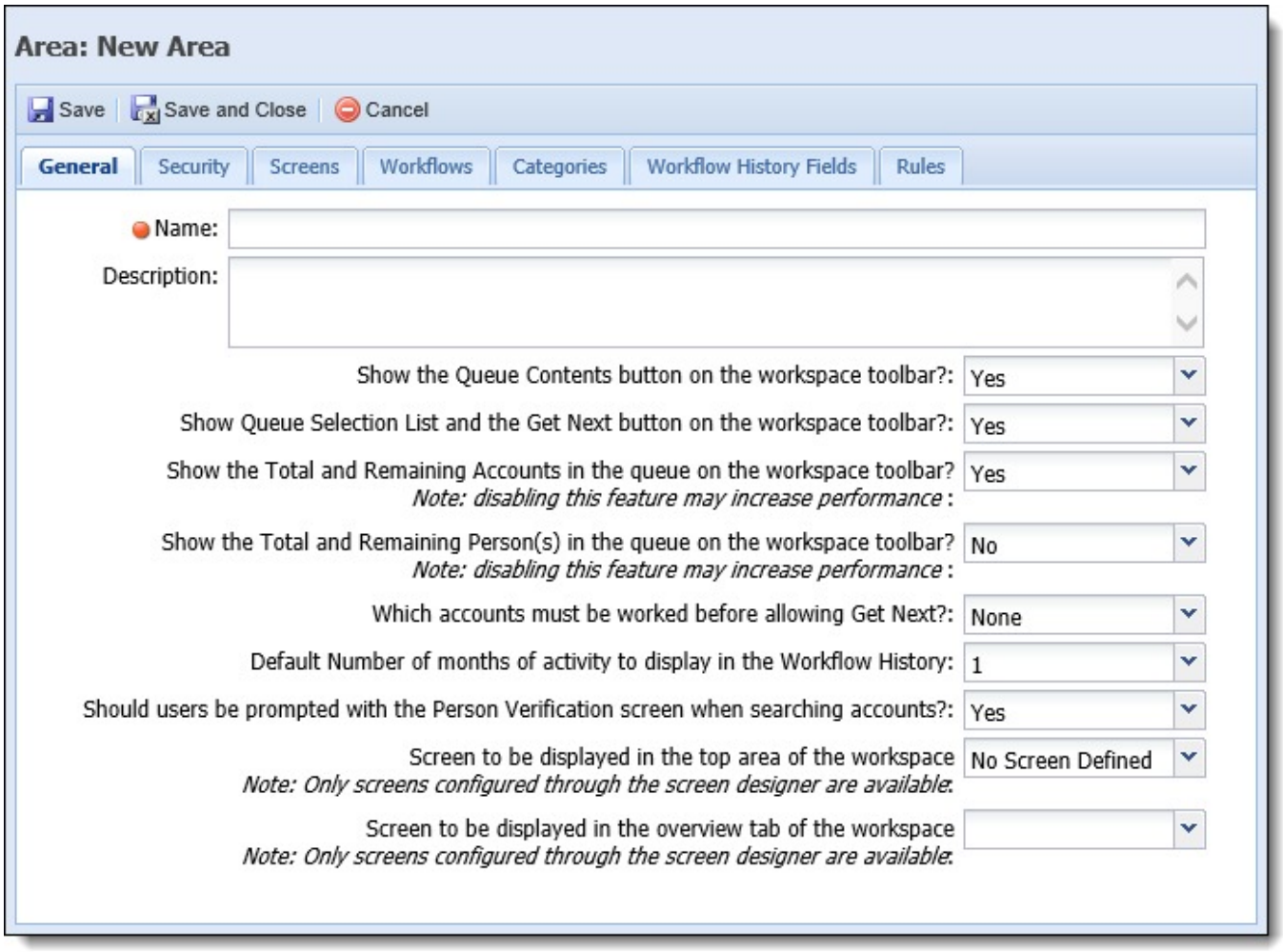


Column Name	Description
Name	The name of the Area that is displayed throughout Temenos Infinity.
Users	The number of users assigned to that Area.
Groups	The number of groups assigned to that Area.
Last Modified	The date when the last modification was made on that Area.
Modified By	The name of the user who made the last modification on that Area.

Area Attributes

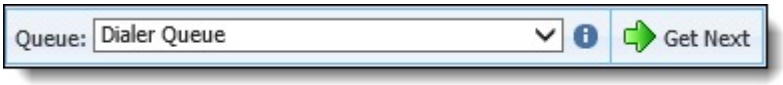
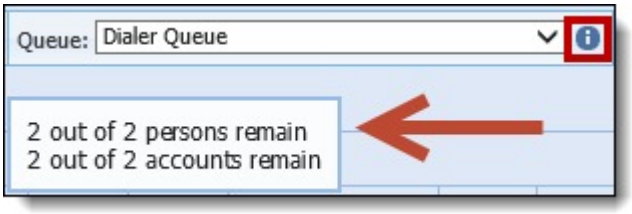
All areas share common attributes that are defined while creating, copying, or editing an area.

General



General attributes are located on the General tab:

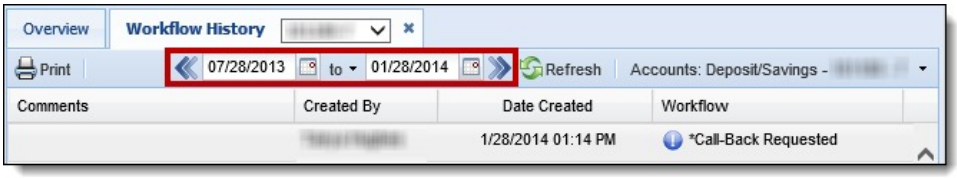
Attribute	Description
Name	Provide a name of the Area. This is a required field.
Description	Provide a description of the new area.
Show the Queue Contents button on the workspace toolbar?	This setting specifies whether the Queue Contents icon displays on the workspace toolbar when a person is accessed from a queue. This icon opens the list of accounts in the queue and allows users to access other accounts in the current queue. When set to appear on the workspace toolbar, the Queue Contents icon is only active when a workspace is accessed through a queue.

Show Queue Selection List and the Get Next button on the workspace toolbar?	This setting specifies whether the Queue Selector drop-down and Get Next button are displayed on the workspace toolbar when a person is accessed from a queue. This setting provides users with the ability to seamlessly work a queue and navigate to other queues.  When set to appear on the workspace toolbar, the Get Next button is only active when a workspace is accessed through a queue.
Show the Total and Remaining Accounts in the queue on the workspace toolbar?	This setting specifies whether an information icon is displayed next to the Queue Selector drop-down in the workspace toolbar. When this feature is enabled, hovering over the information icon displays a message containing the total number of accounts in the queue as of the last queue refresh and the remaining accounts to be worked. Enabling this feature provides users with real-time information about the queue they are currently working.  If the setting to show the total and remaining persons is also enabled, hovering over the information icon displays a count of both remaining accounts and persons.
Show the Total and Remaining Person(s) in the queue on the workspace toolbar?	This setting specifies whether an information icon is displayed next to the Queue Selector drop-down in the workspace toolbar. When this feature is enabled, hovering over the information icon displays a message containing the total number of persons in the queue as of the last queue refresh and the remaining persons to be worked. Enabling this feature provides users with real-time information about the queue they are currently working.

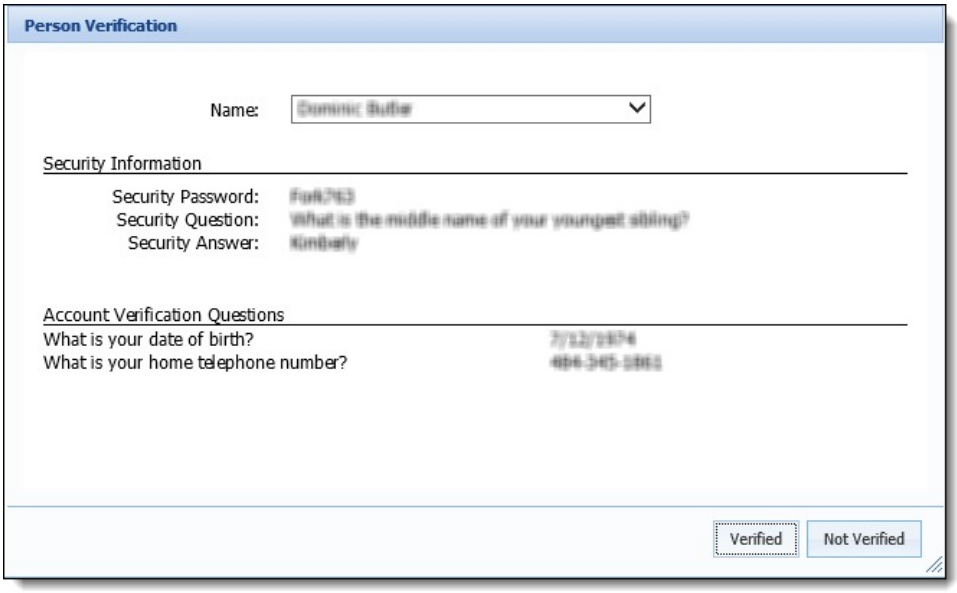
<table>
<tr>
<td>Which accounts must be worked before allowing Get Next?</td>
<td>
This setting determines how the Get Next functionality operates. Select "All accounts in the current queue" to require the user to work all of the account holder's accounts assigned to the current queue prior to working another account holder. Select "All accounts in any queue" to require the user to work all of the account holder's accounts assigned to any queue prior to working another account holder. Select "None" to allow the user to work another account holder in the current queue without working any of the current account holder's other accounts.

If this setting is set to All accounts in the current queue or All accounts in any queue and the Related Accounts panel is configured to include the Queue Info column in System Management > Screens, then the following icons appear within a column in the panel to identify the accounts that must be worked before selecting Get Next:
<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>The account is in the current queue and must be worked before selecting Get Next.</td></tr>
<tr><td></td><td>The account is in a different queue and must be worked before selecting Get Next.</td></tr>
</table>

See the Person Workspace topic to learn more about the Queue information icons and Get Next functionality.
</td>
</tr>
<tr>
<td>Default Number of months of activity to display in the Workflow History</td>
<td>
This setting specifies how many months of activity are displayed by default in the Workflow History screen. Users are able to manually change the date range on this screen.



</td>
</tr>
</table>

Should users be prompted with the Person Verification screen when searching accounts?	This setting specifies if the person verification prompt should appear in the workspace when a person is opened from a search. This provides a security feature prior to opening a person in the workspace. A comment is added to the account holder indicating if person verification was successful. The font and background color is configurable for these comments. See Administrative Settings for information on setting the look and feel of these comments  Configuring Person Verification Messages The Person Verification Message consists of two sections: • **Security Information**- includes a Security Password, Security Question, and Security Answer for the person in context. These fields can be added to user defined Person screens for manual edit. The security questions available for selection within the Person screen are configured from the Security Question lookup field in System Management > Field Configurations. For more information on screen configuration, please see the Screens topic within this guide. The data within the Person Verification Message populates through a Profile Import from the Core. The field paths within the Profile Import are as follows: • Account > Persons > Primary > Security Answer • Account > Persons > Primary >Security Password • Account > Persons > Primary >Security Question • Account > Persons > Secondary 1 > Security Answer • Account > Persons > Secondary 1 > Security Password • Account > Persons > Secondary 1 > Security Question • Account > Persons > Secondary 2 > Security Answer • Account > Persons > Secondary 2 > Security Password • Account > Persons > Secondary 2 > Security Question

- Account > Persons > Secondary 3 > Security Answer
- Account > Persons > Secondary 3 > Security Password
- Account > Persons > Secondary 3 > Security Question
- Account > Persons > Secondary 4 > Security Answer
- Account > Persons > Secondary 4 > Security Password
- Account > Persons > Secondary 4 > Security Question
- Account > Persons > Secondary 5 > Security Answer
- Account > Persons > Secondary 5 > Security Password
- Account > Persons > Secondary 5 > Security Question
- Account > Persons > Secondary 6 > Security Answer
- Account > Persons > Secondary 6 > Security Password
- Account > Persons > Secondary 6 > Security Question
- Account > Persons > Secondary 7 > Security Answer
- Account > Persons > Secondary 7 > Security Password
- Account > Persons > Secondary 7 > Security Question
- Account > Persons > Secondary 8 > Security Answer
- Account > Persons > Secondary 8 > Security Password
- Account > Persons > Secondary 8 > Security Question

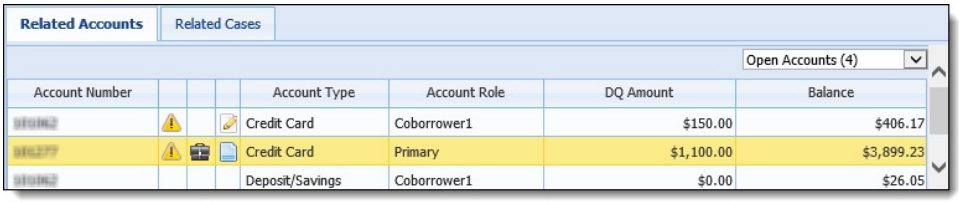
To learn more about manually configuring Security Information for a Person Verification Message, please see Configuring Security Information within the Workspace Toolbar section of the User Guide's Workspace topic.

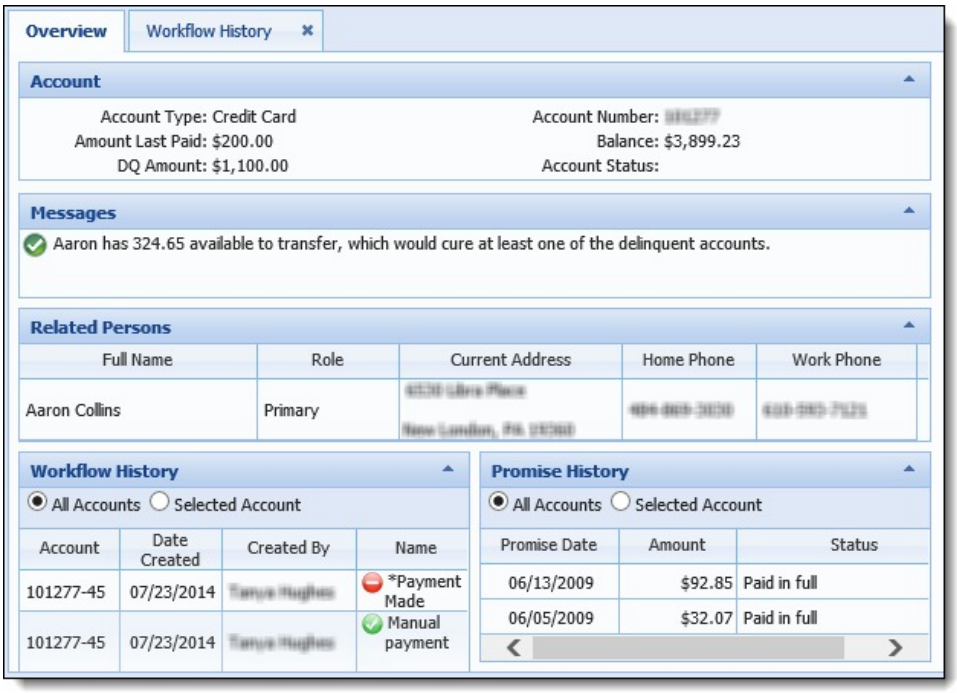
- **Account Verification Questions**- defined in the database and driven by account data, such as Date of Birth, and Home Telephone Number. These questions cannot be configured within the system, and can vary between Person Verification Messages. The following table displays the possible questions that may appear for Account Verification, as well as the field from which an answer is rendered:

Question	Field	Location
What is your email address?	Address	Account > Persons > Primary > Emails > Default Email > Address
What is your date of birth?	Birth Date	Account > Persons > Primary > Birth Date

What is your mother's maiden name?	Mother's Maiden Name	Account > Persons > Primary > Mother's Maiden Name
What are the last 4 digits of your social security number?	SSN/TIN	Account > Persons > Primary > SSN/TIN
What is your home telephone number?	Phone	Account > Persons > Primary > Phones > Home Phone > Phone
What is your work telephone number?	Phone	Account > Persons > Primary > Phones > Work Phone > Phone

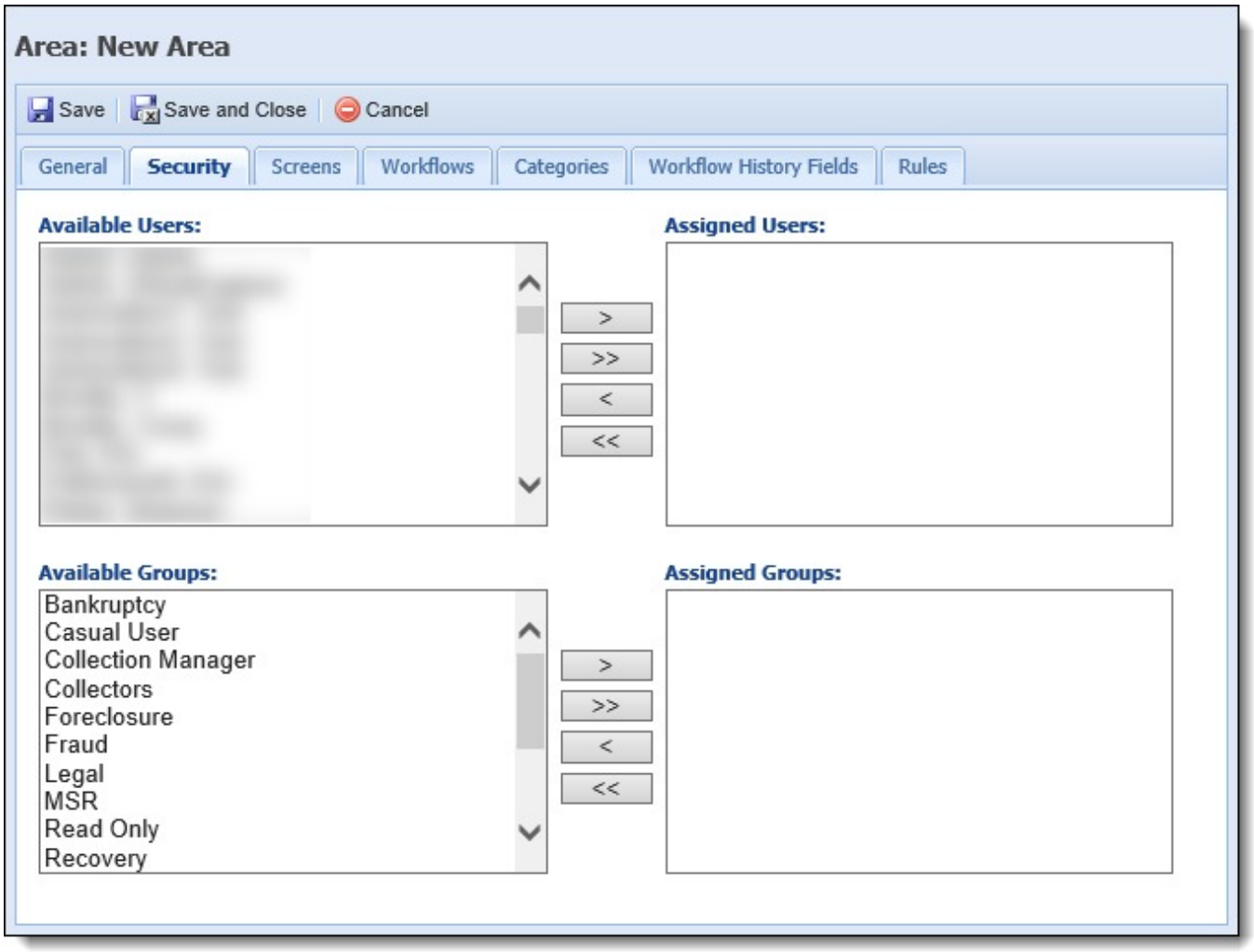
Answers to Account Verification questions are rendered from the field corresponding to the account holder's role. For example, an answer to the question, "What is your date of birth?" for an account holder with a role of Secondary 2 is populated from Account > Persons > Secondary 2 > Birth Date.

Screen to be displayed in the top area of the workspace	This setting specifies the screen to be displayed in the top area of the workspace. The person screens displayed in this drop-down are configured in System Management > Screens. The screens configured in this area support interactions. The top area screen is not a required screen; however, including a Person screen configured with "related" panels provides a complete overview of the accounts/cases for a person in the workspace and enables multi-account functionality. For example, when a Person screen configured to include the **Related Accounts** and **Related Cases** panels is assigned to the top area screen in this drop-down, the layout of the workspace resembles that shown below:  The Related Accounts panel must appear in the workspace in order to run Multi-account workflows. The person screen assigned to the top area of the workspace cannot contain the same panel(s) as the screen assigned to the overview screen if a panel with the property CanHaveMultiple=False is included. This property prevents a panel from being displayed on a page more than once, and returns an error when trying to save the Area. For an overview of each panel, please see the Available Panels section within the Screens topic of this guide. See the Screens topic within this guide for more information on screen configuration and overview of each panel. To learn more about the workspace top area, please see the Workspace Overview topic within this guide.

Screen to be displayed in the Overview tab of the workspace	This setting specifies the screen to be displayed in the overview screen of the workspace. The person screens displayed in this drop-down are configured in System Management > Screens.  This is a required screen. The screens configured in this area support interactions. When an account or case is selected within the Related Accounts or Related Cases panels in the top area screen, the information pertaining to the selected account or case renders in the overview screen. In order for information within a panel to update as a new account or case is selected from the top area screen, the panel must be configured to appear on the person screen mapped to the overview tab in the workspace. Clicking a row within the Related Accounts or Related Cases panel only refreshes the information within the overview screen. Additional information about configuring the overview screen can be found within the Workspace Overview topic.

Security

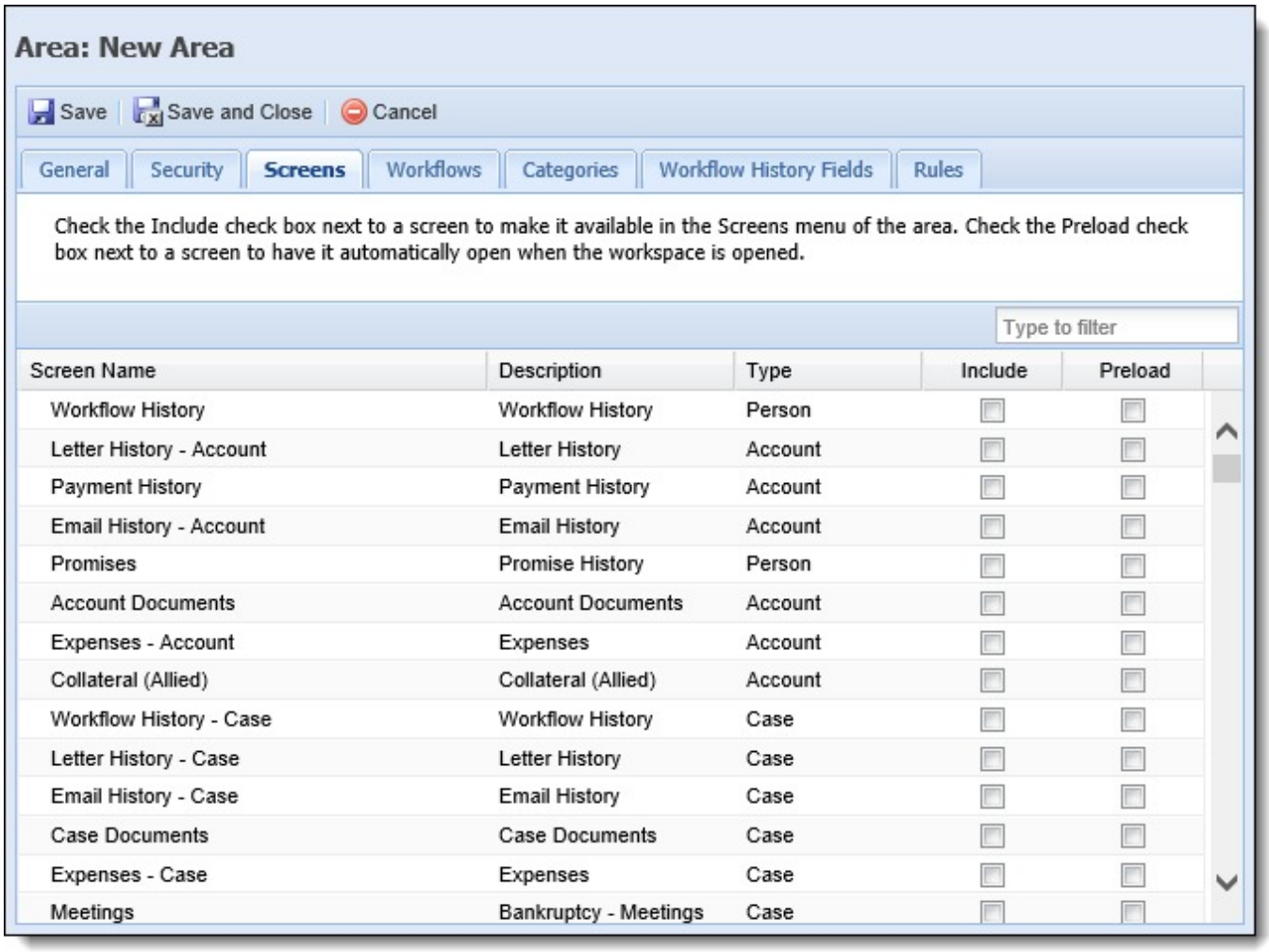
Assign individual users and groups access the area in the Security tab.



Attribute	Description
Assign Users	Select users from the Available Users list and move them to Assigned Users to provide users access to the area.
Assign Groups	Select Groups from the Available Groups list and move them to Assigned Groups to provide groups access to the area.

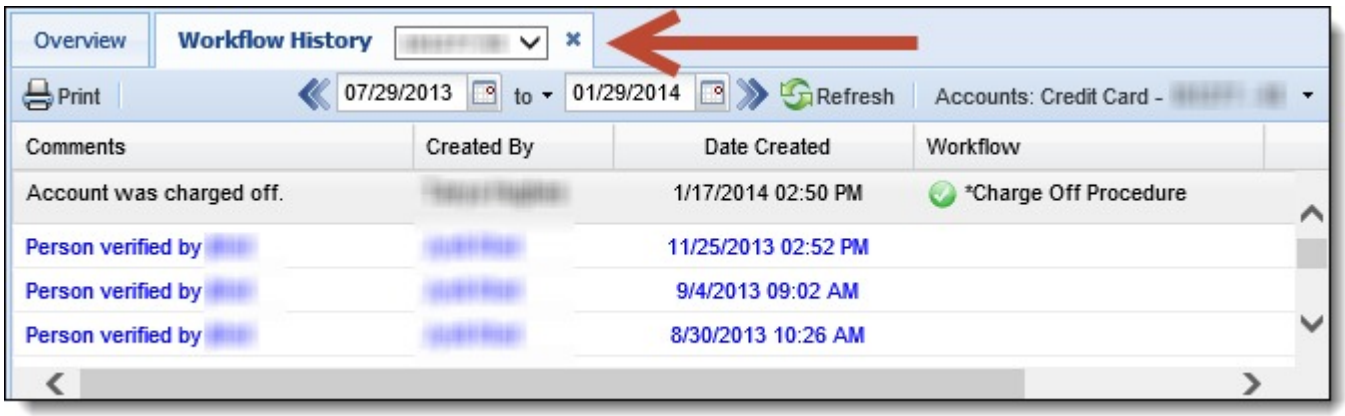
Screens

Within the **Screens** tab, select which screens should be available in the workspace for this Area.



Check the **Include** checkbox next to a screen to make it available on the Screens tab in the Left Navigation Panel of the workspace. Check the **Preload** checkbox next to a screen to have it automatically open when the workspace is opened.

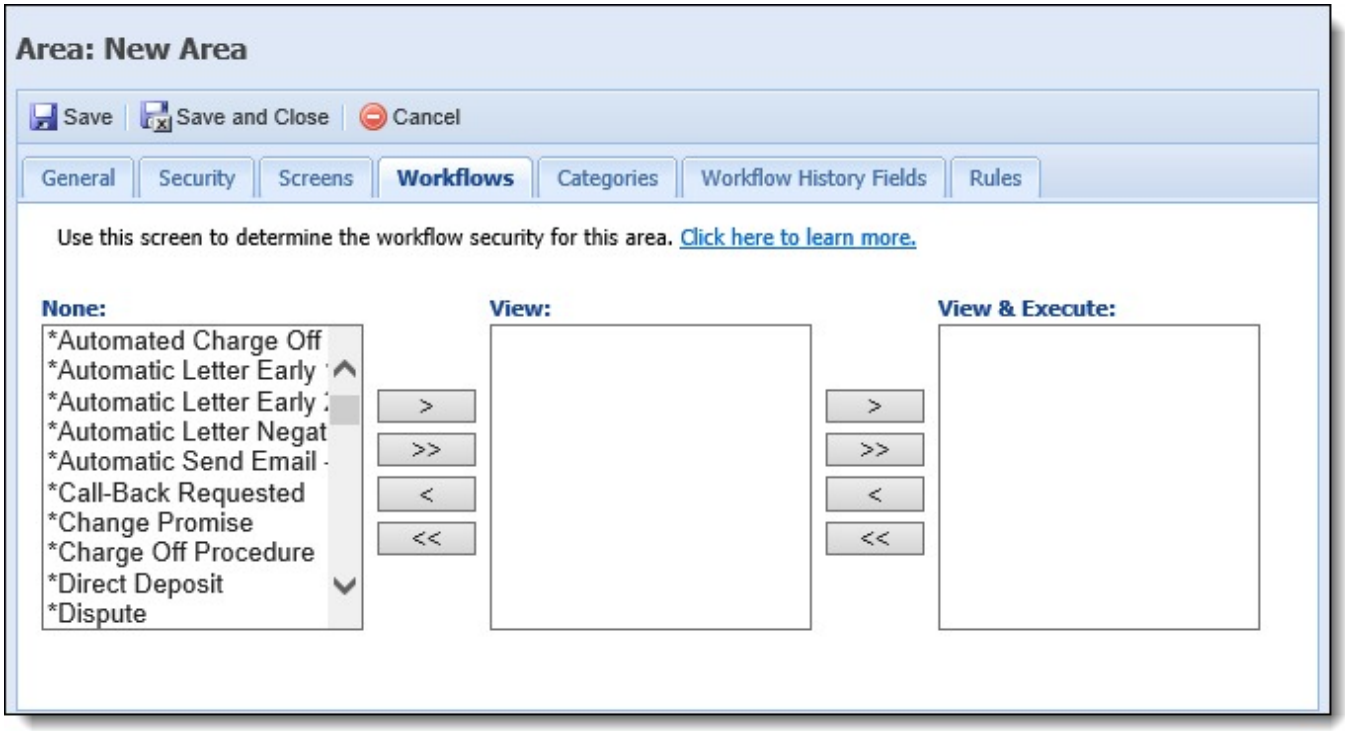
Screens assigned to preload when the workspace is opened populate next to the overview tab.



> Case screens configured to pre-load in the workspace choose an arbitrary case to load by default. If a person is not related to any cases, the case screen does not pre-load.

Workflows

Within the **Workflows** tab, assign workflows to have either **View** status or **View & Execute** status.



Access to Workflows

For access to a workflow, the workflow must be assigned to the area and the user must have direct security access to the workflow or access through a Security Group. This security only applies when a user enters the Workspace of an Area.

For example, if a workflow is not assigned to an Area, the workflow does not appear in the Area regardless of the security applied to the workflow.

When assigning a workflow to an area or assigning Users and Security Groups to a workflow, there are three levels of security:

- None
- View
- View & Execute

None is the lowest level of security and View & Execute is the highest level of security.

Permission	Description
None	The workflow is unavailable from the navigation panel and the workflow is omitted from Workflow History while the user is using the Area regardless of permissions.
View	The workflow is unavailable from the navigation panel; however, the workflow is visible in the Workflow History while the user is using the Area, if the user is granted at least view permission in the workflow's security settings.
View & Execute	The workflow is available from the navigation panel and the workflow is visible in the Workflow History while the user is using the Area, if the user is granted view and execute permissions in the workflow's security settings.

Assigning Workflows

Workflows can be assigned to Areas with two different methods:

- From the workflow: System Management >Workflow > Workflows > Create or Edit > Areas
- From the Area: System Management > Areas > Create, or Edit > Workflows

Users and Security Groups can be assigned with the following methods:

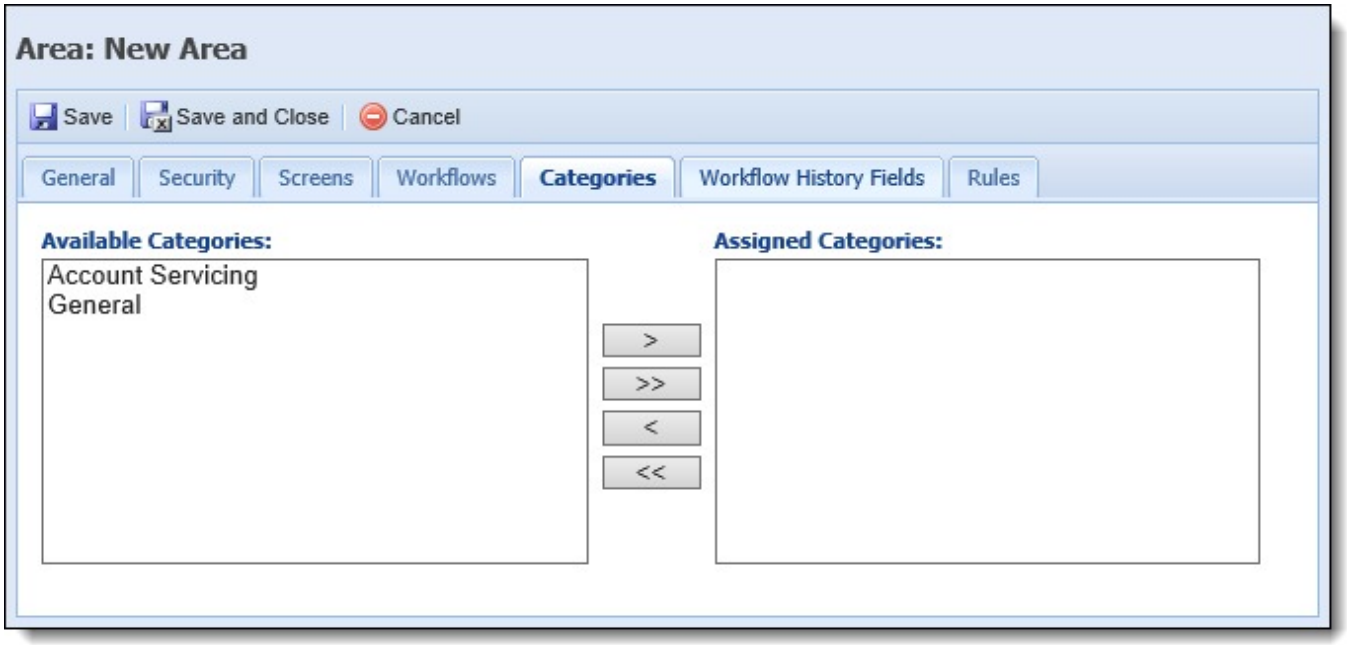
- From the workflow: System Management > Workflow > Workflows > Create or Edit > Security
- From the User: System Management > Users > Create or Edit > Workflows
- From the Security Group: System Management > Groups > Security Groups > Create or Edit > Workflows

General Tips for Managing Workflow Security

If a user is assigned to a Security Group, the highest level of security granted on either the User level or Security Group level is inherited by the user. For example, Sam Rockru is assigned to Security Group A. Security Group A has been given **View & Execute** permissions. However, Sam has been placed in the **None** box. Since he is assigned to Security Group A, Sam still has **View & Execute** permissions for the workflow.

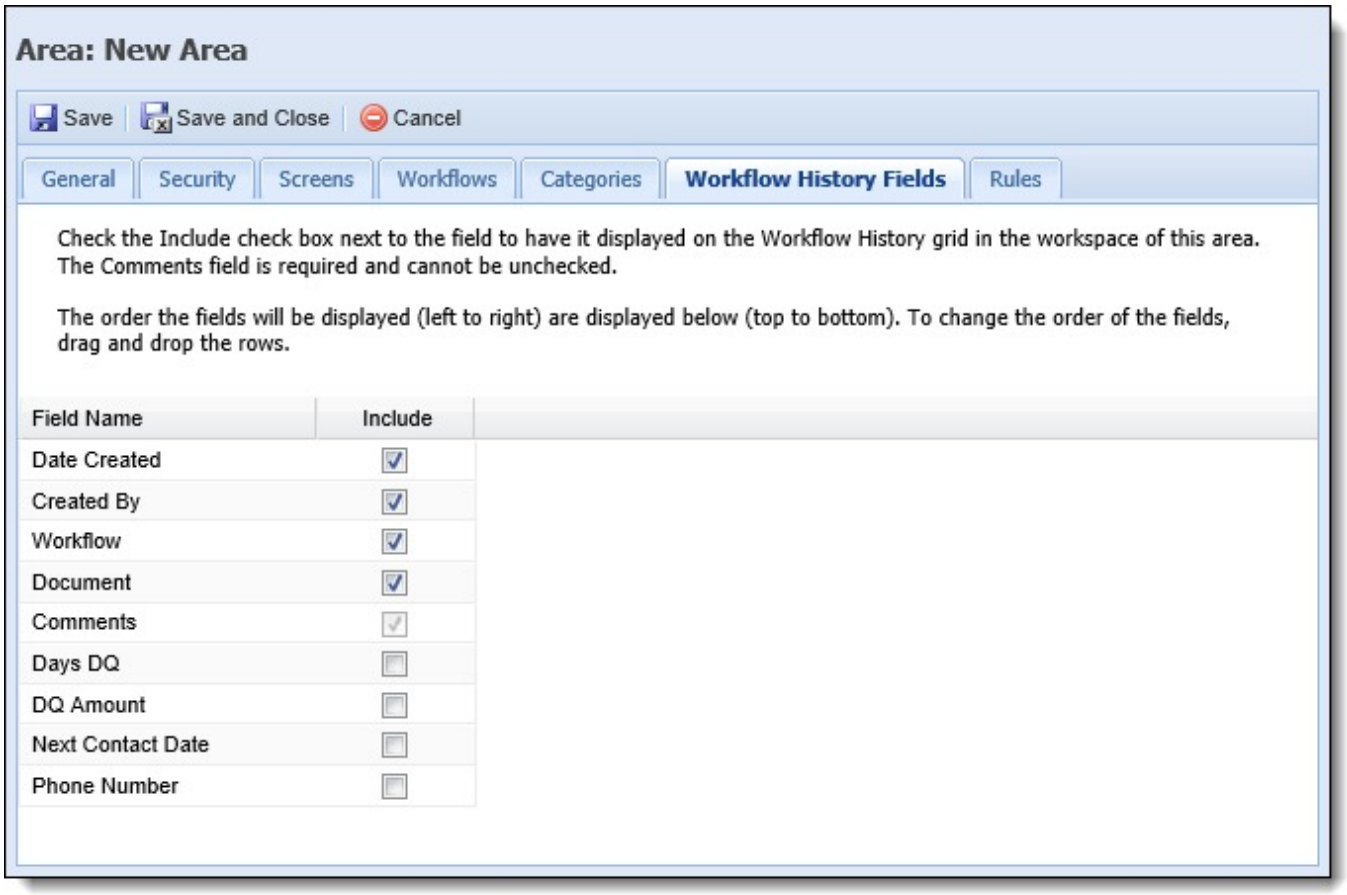
Categories

In the **Categories** tab, assign the categories to be used in this Area.

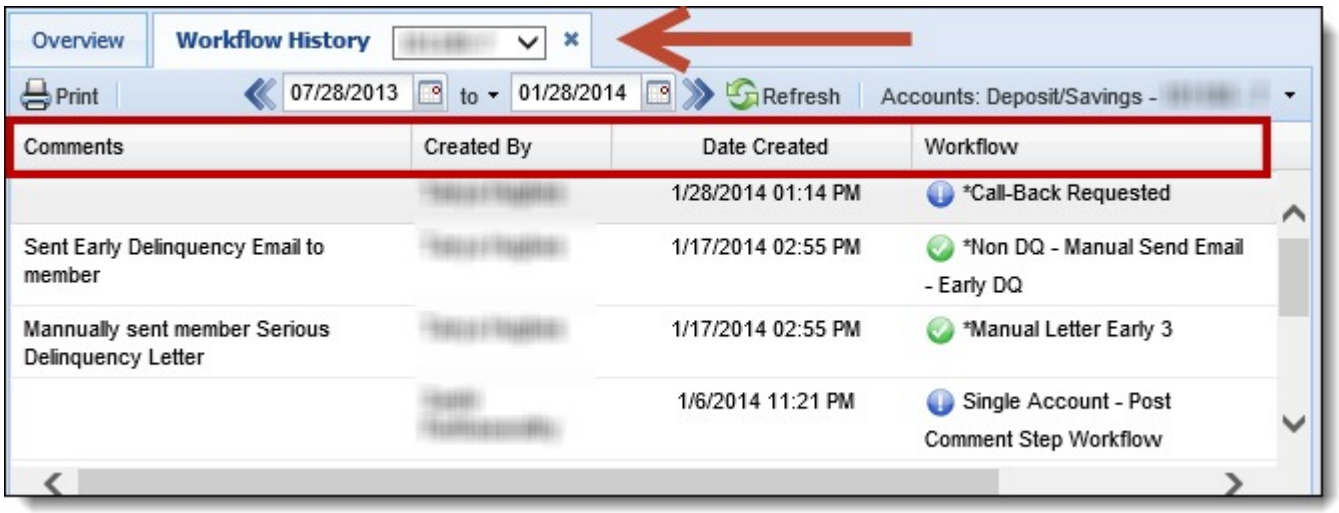


Workflow History Fields

In the **Workflow History Fields** tab, determine the fields that display in the **Workflow History** screen when an account is open in the workspace. Check the **Include** check box next to the field to have it displayed on the Workflow History screen in the workspace of this Area.

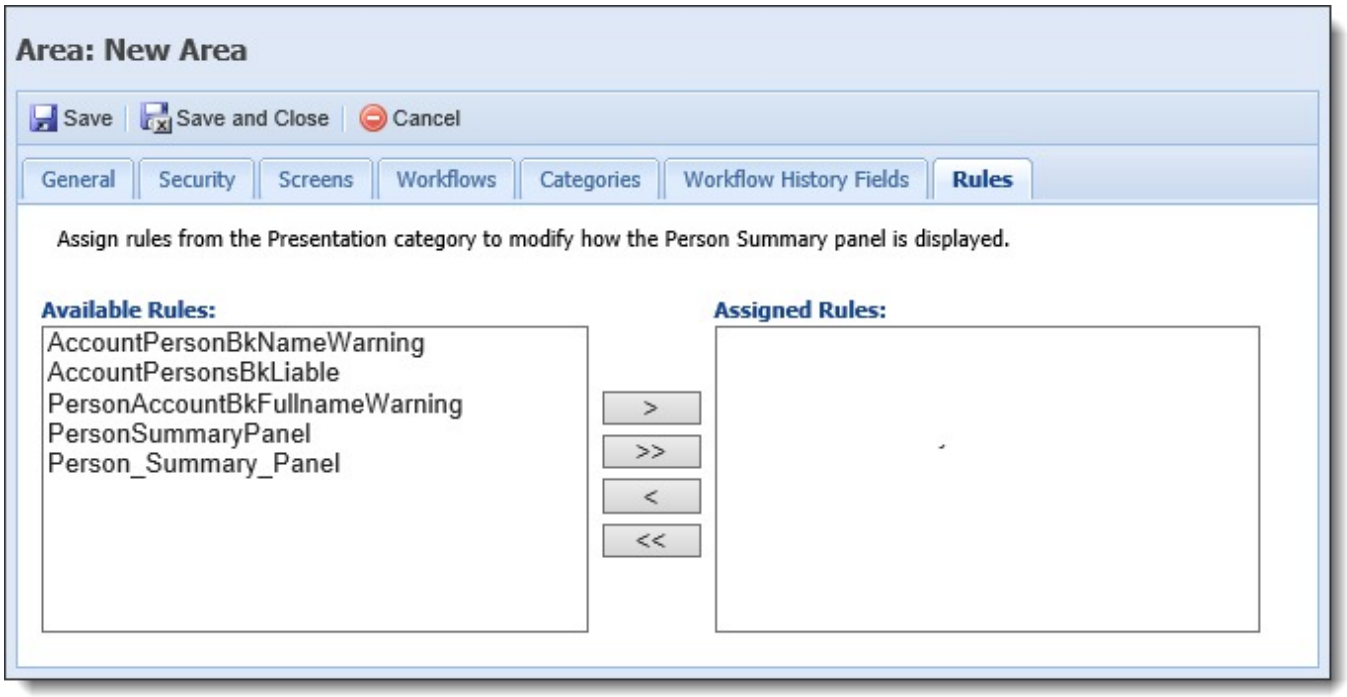


The order the fields are displayed on the Workflow History Screen (left to right) are displayed on this tab (top to bottom). Drag and drop the rows within the Workflow History Fields tab to change the order that the fields appear on the Workflow History screen.



Rules

From the Rules tab, assign the rules to execute within the Workspace Person Summary using the two boxes that display:



The **Available Rules** box contains all Presentation Rules configured in System Management > Collections > **Rules Management.** Administrators can assign rules to the Person Summary panel by clicking the arrows that display to move the desired rule(s) to the Assigned Rules box.

Rules in the **Assigned Rules** box execute upon loading a person workspace within the assigned Area and display the information in the Person Summary panel after the workspace has loaded.

> See Workspace Overview for more information about the rule configuration for the Person Summary panel. Please see the Rule Authoring topic within this Guide to learn more about authoring Business Rules.

Saving the Area

Once all information for the Area has been configured, click **Save**.

A success message displays to confirm that the Area was saved successfully. Select **OK**.

Click **Save and Close** to save the new Area and return to the Areas page.

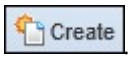
Select **Cancel** to abandon all changes made to the area. The following confirmation message displays:

Click **Yes** to proceed with the cancellation process. Click **No** to return to the Areas page.

> Upon saving the new Area, authorized users are able to access it in the Area drop-down when a workspace is open.
>
>
>

The new Area can now be assigned to other features throughout Temenos Infinity, such as Reports, Queues, etc.

▸ Creating an Area

- To create an area click  The New Areas Screen appears.
- Navigate through the tabs and define the necessary attributes.
- When finished making any changes, click **Save** or **Save and Close** to save the new area and return to the Areas page.

- Users with the appropriate access can now access the new Area in the Area drop-down when a workspace is open.
- The new Area can be assigned to other features throughout Temenos Infinity, such as Reports and Queues.

Copying an Area

- Select an area to highlight it and click Copy.
- The Copy Area screen appears.
- Navigate through the tabs and make any necessary updates to the Area.
- When finished making any changes, click **Save** or **Save and Close** to save the new area and return to the Areas page. .
- Users with access can now access the Area in the Area drop-down when a workspace is open.

Editing an Area

- Select an area to highlight it and click Edit. The Edit Area screen appears.
- Navigate through all the tabs and make any necessary updates to the Area.
- When finished making any changes, click **Save** or **Save and Close** to save the Area and return to the Areas page.

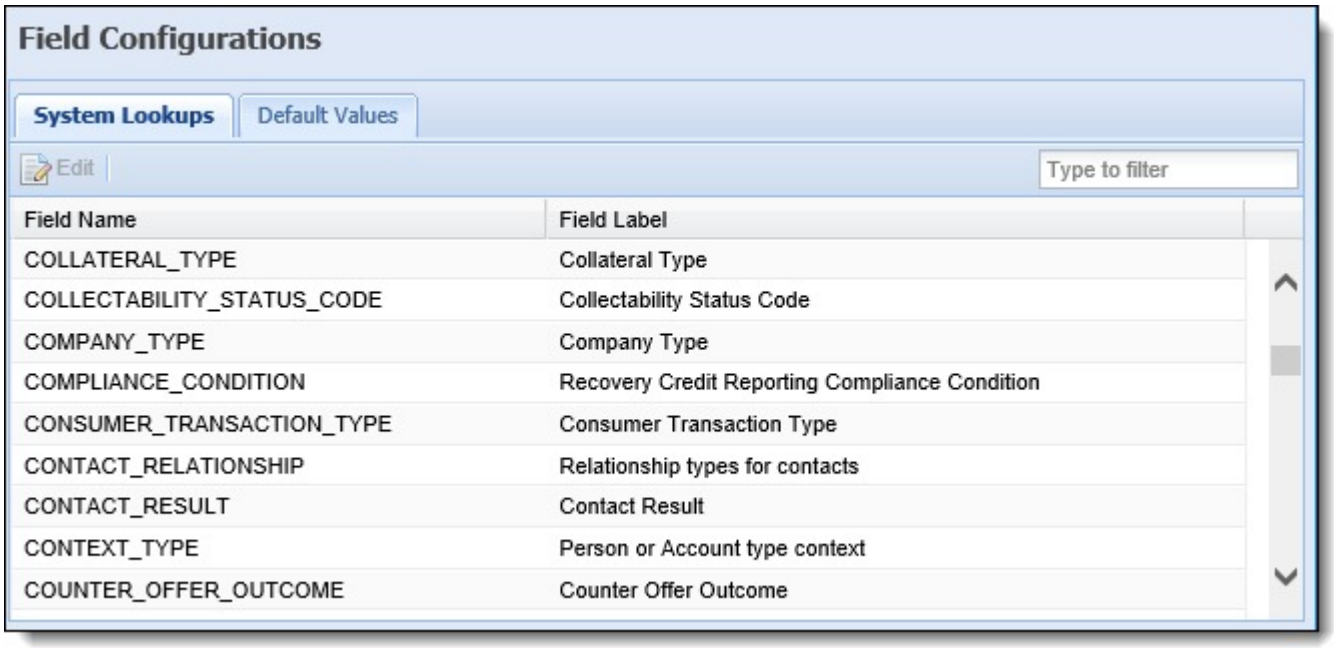
Deleting an Area

- Select an area to highlight it and click Delete.
- A confirmation message appears.
- Click **Yes** to delete the area. Click **No** to return to the Areas page without deleting.

Field Configurations

Field Configurations eliminate the need to retype the same information each time a field needs to be filled. Lookup lists allow for the creation of fields to store data that have a limited number of possible values. When a field needs to be completed, simply click the drop-down arrow and select the appropriate value.

Navigate to System Management > Field Configurations. From this screen, administrators can edit System Lookups and Default Values.



System Lookups

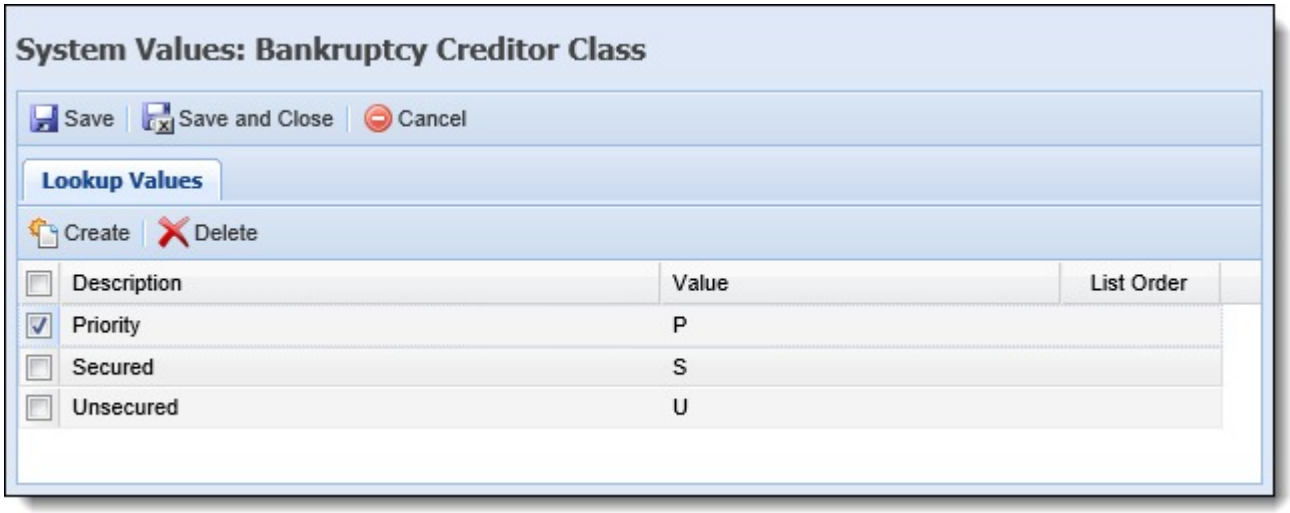
System Lookups are predefined lookups within Temenos Infinity. These cannot be edited but additional values can be added to the lookup.

The System Lookups tab contains the following columns:

Column Name	Description
Field Name	The name of the field in the database.
Field Label	The user-friendly label of the field in Temenos Infinity.

Editing a Lookup

To edit a lookup, double-click the lookup, or highlight the lookup, and click Edit . The Edit System Values screen appears.



Creating a Lookup Value

To create an additional lookup value, click **Create**. An additional row appears at the bottom of the list of values. Type in the desired value and description in the new row.

System-defined values are displayed in grey boxes and cannot be edited, but they can be deleted.

If authoring Business Rules, it is recommended to select the **Sync.Lookups** button on the Application Toolbar in Rules Manager before authoring a new rule in order to ensure the newly created Lookup Values are available within the Rules Management Application.

Deleting a Lookup Value

To delete a lookup value, select the check box next to the value and click **Delete**. A confirmation prompt appears. Click **Yes** to delete the selected value(s) or **No** to retain the selected value(s).

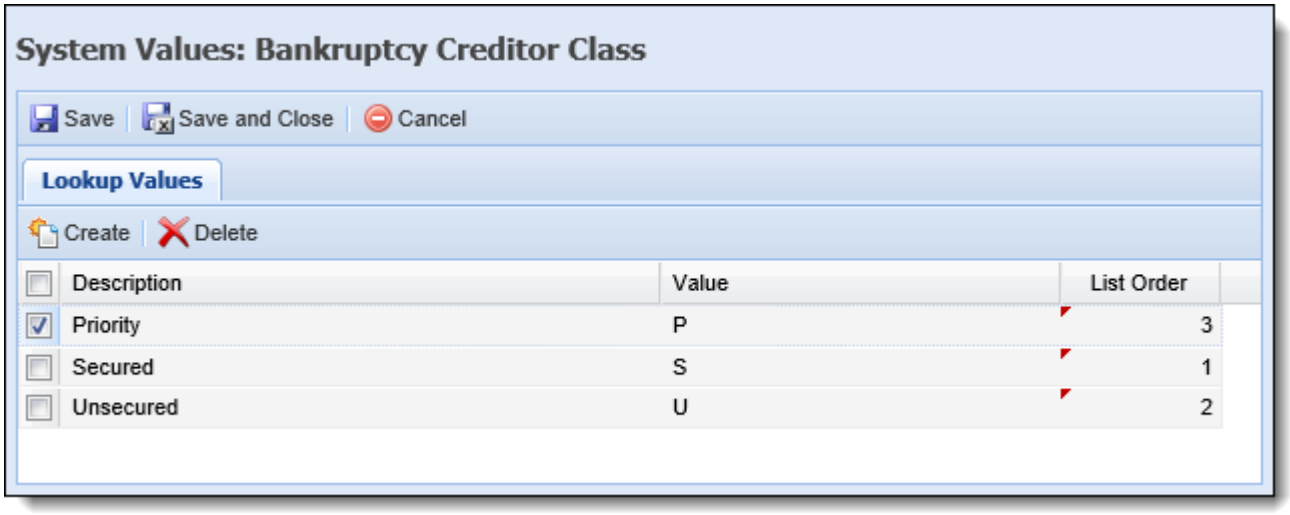
Ordering Values

To assign a display order to the values within a Lookup, enter a numerical value of zero (0) or greater in the desired ascending order under the List Order column.

By default, the List Order column appears blank in the System Values window, and lookup values are listed alphabetically in an application.

Only numerical values can be entered within the List Order field. Additionally, an error is received upon saving a lookup field if the same number is entered in the List Order column more than once, or if a number is not defined for each lookup value.

In the example below, the following list order is assigned to the lookup values for the Bankruptcy Creditor Class lookup in Field Configurations:

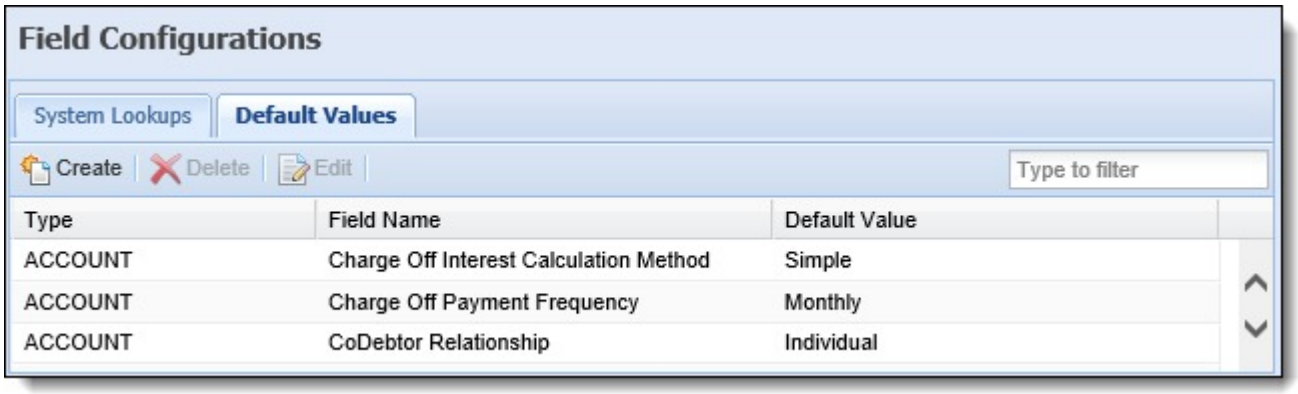


Once all values have been ordered, click Save and Close to retain the data and close the window.

Default Values

Default Values can be set up on the Default Values tab so that when a new account or case is created, or added to Temenos Infinity, the system updates the account or case level field with the chosen default value, if the field does not already have a value.

The nightly process that sets default values only runs for new accounts and cases; and is triggered when a new account or case is added from the workspace via Create Account or Import Account, after the daily account import process is complete, and any third party account import processes are complete. This nightly process sets the default values for the configured account fields for all new accounts, case fields for all new cases.



The Default Values tab contains the following columns:

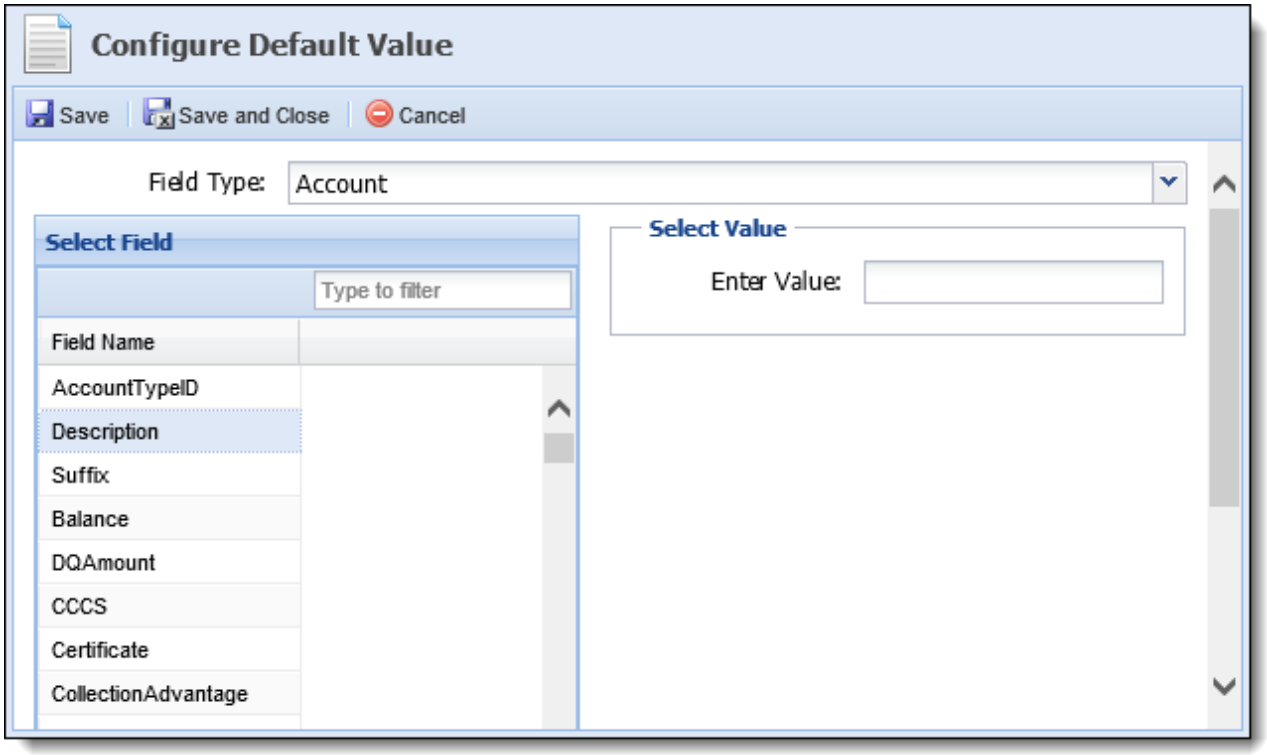
Column Name	Description
Type	The type of field that has a default value. From the drop-down list, select Account or Case.
Field Name	The name of the field.
Default Value	The default value assigned to the field.

Creating a New Default Value

To create a new default value:

- Click **Create**.
- The Configure Default Value window appears.

- Select the desired field from the Select Field section of the screen by scrolling through the list or typing the field name in the filter box.
- Click the field to highlight it blue.



- The field chosen drives the value that can be entered in the Select Value section of the screen. For example, when creating a default value for Delinquent Flag, a boolean field (check box) is displayed. The following controls can be displayed in this section:

Field Type	Control Rendered
Lookup Field	A drop down control with available values for that lookup.
Date Field	A calendar control with the option to set the date formula like TODAY+1D.
Decimal Field	A textbox for entering decimal values only.
Integer Field	A textbox for entering integer values only.

Boolean Field	A checkbox.
String Field	A standard textbox.

- Once the value is entered, click **Save** or **Save and Close**. The new Default Value is added to the list on the Default Values tab. Click **Cancel** to return to the Default Values tab without saving any changes.

Editing a Default Value

To edit a Default Value:

- Double-click the desired value in the grid, or highlight the value and click **Edit.**
- The Configure Default Value window appears.
- Make the desired modifications, and click **Save** or **Save and Close**.

Deleting a Default Value

To delete a Default Value:

- Highlight the desired value in the grid, and click **Delete**.
- A confirmation prompt appears.
- Click **Yes** to delete the value. Click **No** to retain the value.

Criteria Builder Help

Criteria builder uses the field list, operators and values to assist administrators in defining searches when archiving data, building a View, building an Export, etc.

Prior to building criteria, determine what fields must be used to meet the objective. For example, if the objective is to search for all delinquent loans between 30 and 45 days, determine that the following attributes must be used to achieve the expected results.

- Delinquent – Specify that only delinquent accounts should be in the queue
- Loans – Specify that loans should be in the queue
- Between 30 and 45 days DQ – Specify the DQ date range

By breaking down what is trying to be built, it is easier to identify the pieces of criteria that are needed.

The following sections define the components of the criteria builder.

Using the Field List

The field list is a feature used throughout Temenos Infinity to define the fields to display on reports, views, and exports. It is also used in criteria building for reports, views, exports, and searches.

Each field selector window looks the same regardless of how it is accessed. In the below example, the field selector has been accessed through the Fields tab when creating a new report.

By default, the field selector opens in a tree format with expandable folders and sub-folders.

Field Tree

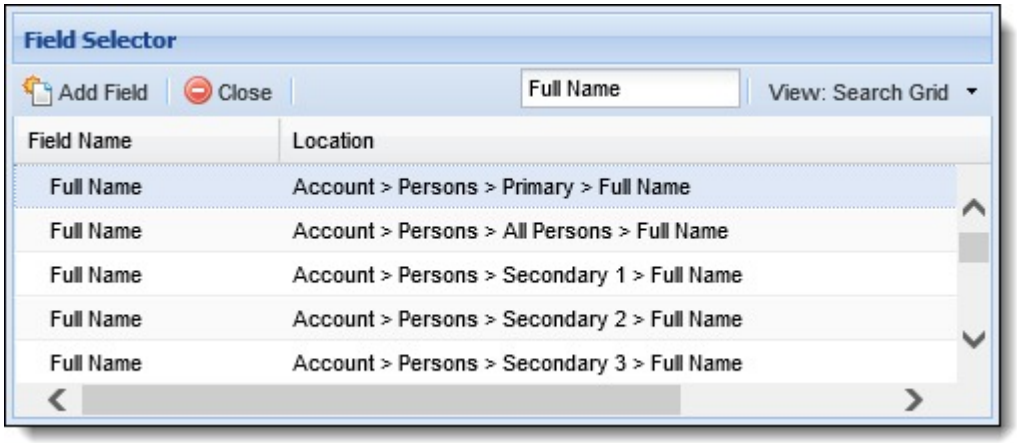
When using the Field Tree format, click the arrow next to the field name to expand or collapse the list of available fields. Expand each section until the desired field is found, or search for the field by entering text into the search text box, and hitting **Enter** on the keyboard.

Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

Search Grid

To change the view of the field selector from a tree to a search grid format, click the **View** drop-down in the top of the field selector window, and select **Search Grid**.

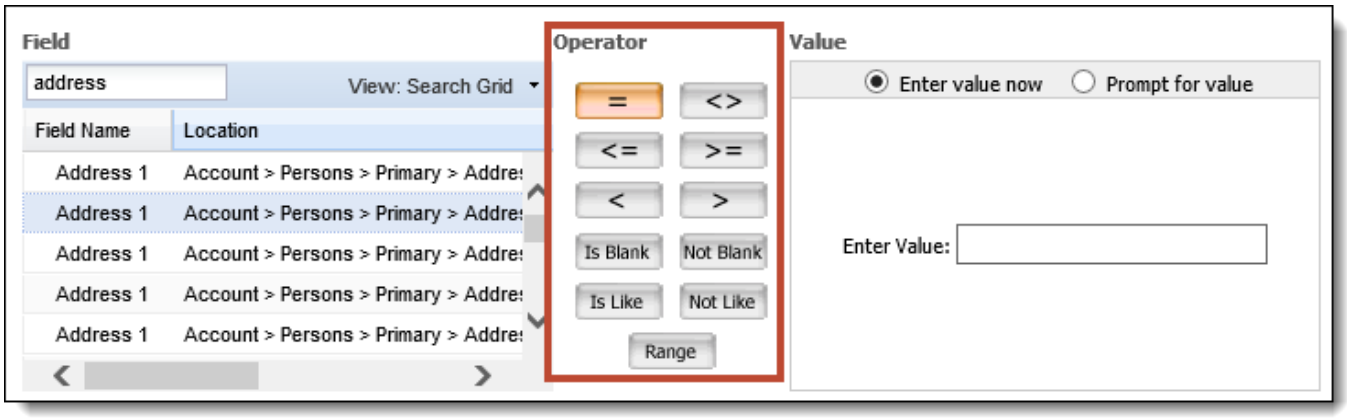
Using the Search functionality, locate the desired field by entering text into the text box, and hitting **Enter** on the keyboard. A list of results displays including the field name and location in Temenos Infinity.



Once the desired field is located, highlight the field, and then double-click the field, or select Add Field at the top of the field selector window, to add it to the field list.

Operators

Once the field has been identified using the field list, choose the appropriate operator using the buttons in the middle of the Criteria Builder.



The table below provides a summary of each operator within the Criteria Builder:

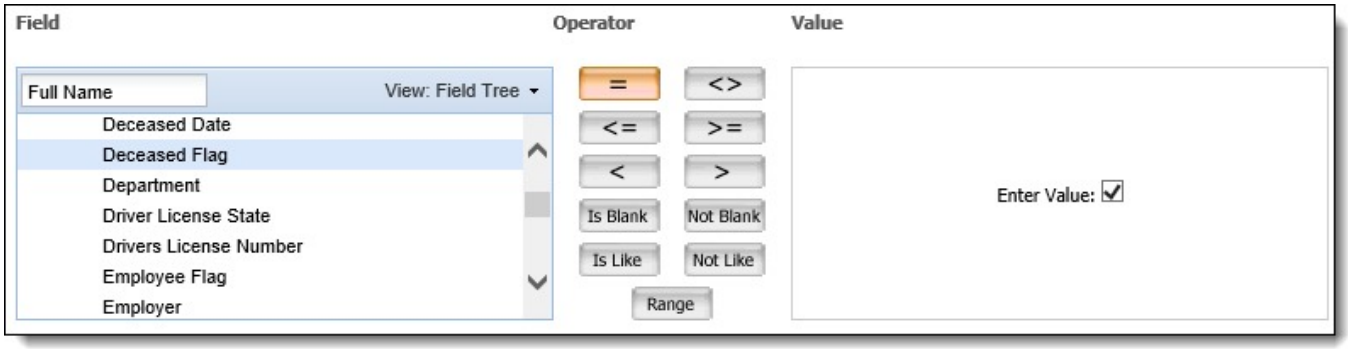
The Not Equal to and Not Like operators individually include null records.

Operator	Description
Equal to	Only the value entered is returned.
Not Equal to	All other values are returned except the value entered.
Less Than or Equal to	Used in conjunction with a numerical value. Returns values beginning with value entered and all lesser values.
Greater Than or Equal to	Used in conjunction with a numerical value. Returns values beginning with value entered and all greater values.
Less Than	Returns all values less than, but not including, the specified value.
Greater Than	Returns all values greater than, but not including, the specified value.
Is Blank	Returns values where the selected field is blank or null. Common examples include date fields, flags, and text fields.
Not Blank	Returns values where the selected field is not blank or null.
Is Like	Returns values where a segment of the value corresponds with the value entered. For example, entering 'K59' returns a value of '123.'
Not Like	Returns values where a segment of the value does not correspond with the value entered. Choose a value that is 'not like' the value being searched for.
Range	Sets a scope or limits for the criteria. Use a range when looking for a specific group or time frame.

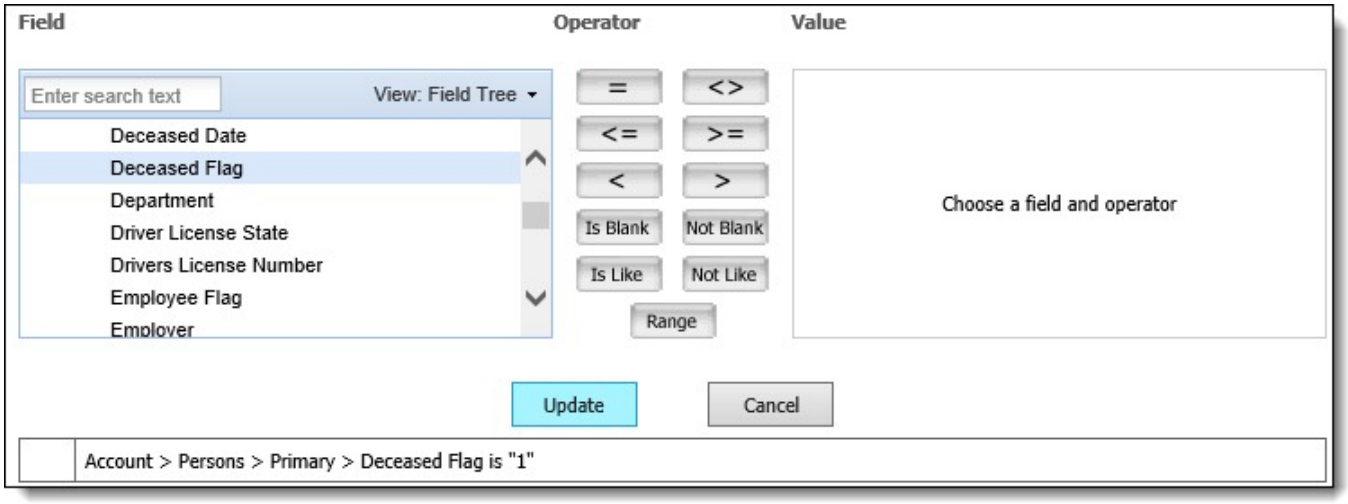
Values

Once a field and operator have been chosen, the value section of the Criteria Builder becomes available. The field and operator drive the value that can be added to the criteria. For example, if using a date field, a displays in the value section to select a specific date, or range of dates. If using a flag field, a check box displays in the value section as shown in the below example:

When adding a date field, define the desired value by single-clicking within the text box to manually enter a date, or double-clicking within the text box, or clicking , to select the date from a calendar.



After a value has been chosen, click **Update** to add the criteria to the list.



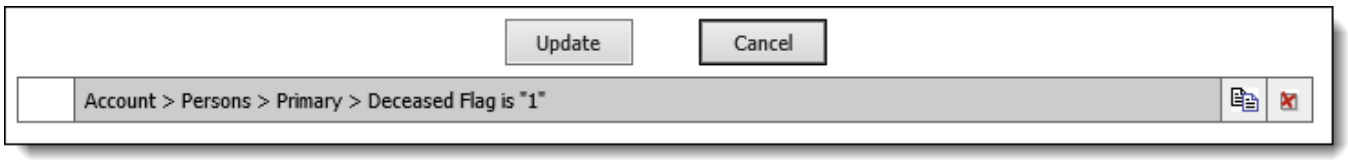
Repeat for as many lines of criteria as desired.

How do I edit or make a change to an existing piece of criteria?

To edit or make a change to an existing piece of criteria, click on the piece of criteria that is to be updated. The line of criteria is shaded grey. Make any changes necessary and click **Update**.

How do I delete a line of criteria?

To remove a line of criteria, hover the mouse over the piece of criteria that is to be deleted. To the far right, appears. Click to delete the criteria.



If a line of criteria is clicked accidentally and it populates in the criteria builder to be edited, clicking **Cancel** withdraws the selection from the criteria builder without erasing the criteria.

Using 'OR' statements

As pieces of criteria are added, they are associated through the use of 'and' statements. When reading through the criteria below it states "Deceased Flag equal to True AND Employee Flag equal to True."

	Account > Persons > Primary > Deceased Flag is "1"
AND	Account > Persons > Primary > Employee Flag is "1"

In some situations, users might not want the criteria to read that way. It may be required to build criteria that shows anything with a Deceased Flag OR an Employee Flag equal to True. In this situation, switch the 'AND' to an 'OR.'

Switch the statement to 'OR' by clicking on the 'AND' in the small box to the left of the criteria. Now the criteria reads as desired.

	Account > Persons > Primary > Deceased Flag is "1"
OR	Account > Persons > Primary > Employee Flag is "1"

Grouping or Bundling Lines of Criteria Together

For more advanced criteria building, more than one line of criteria can be grouped or bundled together. This further refines and narrows the criteria results.

For example, to run a search that shows account holders residing in Pennsylvania or Delaware with birthdays on October 1st, it is necessary to have two lines of criteria to state these scenarios. Because one account holder cannot reside in both states, the states must be grouped together so the intended results are returned.

	Account > Persons > Primary > Addresses > Home Address > State is "PA"
OR	Account > Persons > Primary > Addresses > Home Address > State is "DE"
AND	Account > Persons > Primary > Birth Date is "10/1/2014"

Looking at the criteria above, the desire is to have two state lines to be grouped or bundled. Hover over the line of criteria. An icon appears on the far left.

	Account > Persons > Primary > Addresses > Home Address > State is "PA"
OR	Account > Persons > Primary > Addresses > Home Address > State is "DE"
AND	Account > Persons > Primary > Birth Date is "10/1/2014"

Click . A prompt appears instructing to select another line of criteria to group with the selected line.

	Account > Persons > Primary > Addresses > Home Address > State is "PA"
OR	Select a group to add this rule into... Account > Persons > Primary > Addresses > Home Address > State is "DE"
AND	Account > Persons > Primary > Birth Date is "10/1/2014"

Click the desired line of criteria to group with the selected line. After the lines are grouped together, they appear as

one single line of criteria.

	Account > Persons > Primary > Addresses > Home Address > State is "PA"
	AND Account > Persons > Primary > Addresses > Home Address > State is "DE"
AND	Account > Persons > Primary > Birth Date is "10/1/2014"

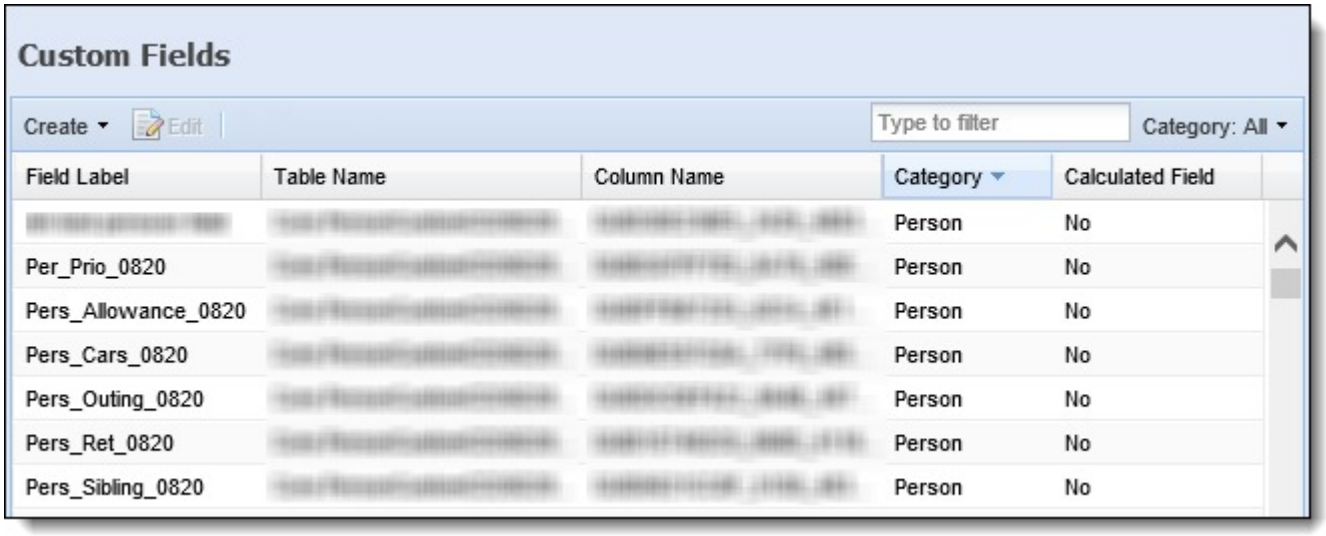
With the lines grouped together, click the 'AND' within the grouped state criteria lines to make it 'OR.'

	Account > Persons > Primary > Addresses > Home Address > State is "PA"
	OR Account > Persons > Primary > Addresses > Home Address > State is "DE"
AND	Account > Persons > Primary > Birth Date is "10/1/2014"

Custom Fields

The Custom Fields page in System Management (System Management > Custom Fields), can be used to extend the database by allowing the addition of new fields. These fields are then usable through the field lists throughout Temenos Infinity.

> Custom Fields are accessed in field lists throughout Temenos Infinity. For example, when building a report, administrators can insert custom fields to display on the report.



The following columns display on the custom fields page:

Column Name	Description
Field Label	The name of the Custom Field.
Table Name	The name of the table in the Temenos database where the custom field is located. This is for troubleshooting purposes.
Column Name	The name of the column in the Temenos database where the custom field is located. This is for troubleshooting purposes.

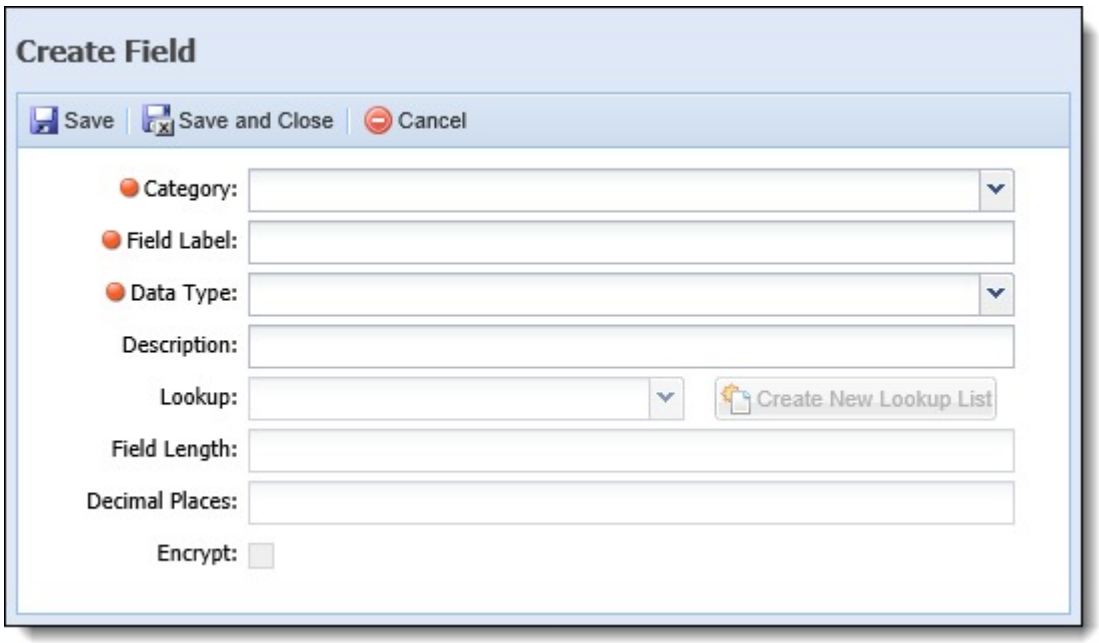
Category	Displays the category in which the custom field was applied.
Calculated Field	Displays whether or not the field is calculated.

The Custom Field List screen allows administrators to create custom and calculated fields.

Creating a Custom Field

- Click Create. Select Custom Field within the drop-down list.
- The Create Field screen appears.

> Custom Fields should be added to the module after business hours. If a new custom field is created during business hours, it could cause a potential deadlock within the workspace that would negatively impact end users.

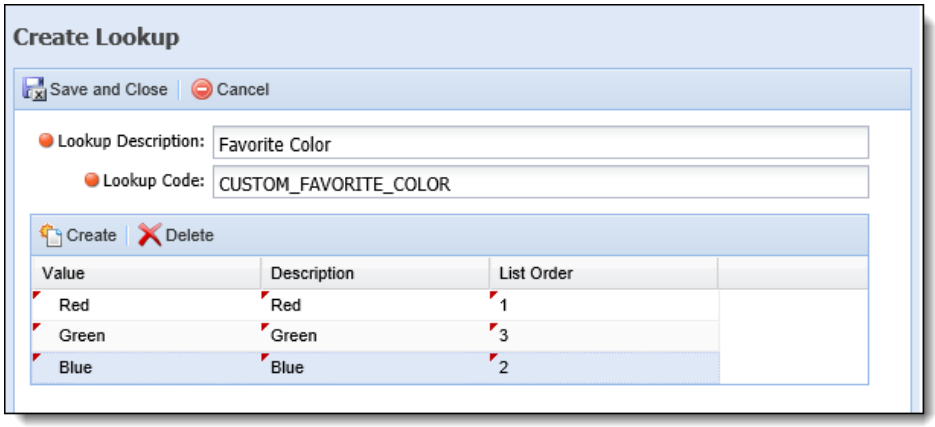


- The following fields appear on the Create Field Screen:

Field Name	Description

Category	Drop-down that contains a list of the categories in which the custom field is saved and made available in the database. This drop-down includes the following values: • Account • Case • Case Bankruptcy • Case Foreclosure • Case Legal • Case REO • Case Repossession • Case Short Sale • Garnishment • Person For each of the following Categories, a maximum of 1,023 custom fields can be created: • Account • Person • Case • Collateral • Garnishment • Repayment Plan Upon creating a 1,024th field and clicking Save or Save and Close, an error message is received stating the maximum number of fields for the Category has been reached and the new field cannot be created. Custom fields created in the Case Bankruptcy, Case Foreclosure, Case Legal, Case Loan Modification, Case REO, Case Repossession, and Case Short Sale categories are only available for addition to Case type screens; they are not available for addition to sub-item Case type screens, such as Case Bankruptcy and Case Foreclosure. For example, a Case Bankruptcy type custom field is not available for addition to Case Bankruptcy type screens and panels; it can only be added to Case type screens and panels.
Field Label	The name of the custom field. This is what appears in the Field List. The Field Label does not support special characters and must meet the following requirements or a validation error is received upon trying to save the custom field: • Start with a letter • Contain only alpha-numeric characters and spaces • End with an alpha-numeric character • Include less than 100 characters

Data Type	Drop-down that determines the type of custom field that is being created. The following options are available to select within the Data Type drop-down list: • Character • Date • Datetime • Flag • Lookup • Money • Number • PIN/Password When PIN/Password field is selected, the Encrypt check box is automatically set to True and remains unchangeable. By default, custom fields configured with a Date Data Type are formatted as mm/yyyy in screens. Custom fields configured as Datetime are formatted as mm/dd/yyy, and populate both the date and time. The value of Date custom fields, and Datetime custom fields, populate in the above format by default; however, when the custom field is added to a screen panel, the Date Format of the field can be modified within the Fields tab of the panel configuration window.
Description	If necessary, provide a description of the new custom field.

Lookup	This field contains a drop-down list that consists of the field lookups, which may be linked to the custom field. Lookup is available when the Lookup Data Type is selected. The options that appear within this drop-down list populate from the following locations: • System Management > Field Configurations • System Management > Origination > Field Configurations Additional options populate from the following tables in the database: **Database Tables** / **Lookup Name** Core.Branch / Branch tblCompany / Company tblUser / User (Last, First) Creating a New Lookup List Click Create New Lookup List to create a new drop-down list. Once clicked, the Create Lookup window opens, which allows administrators to create a new lookup list that may be linked to the custom field.  In the Create Lookup window, administrators are prompted to complete the following attributes: **Attribute** / **Description** Lookup Description / Indicates how the field lookup appears in the Field List. Lookup Code / Indicates how the field lookup is stored in the database.

A lookup table, along with a series of buttons, allow administrators to view and maintain the values linked to the lookup. Using the following buttons, administrators are able to maintain the custom values for the lookup:

Button	Description
Create	Allows the administrator to add an option to the custom lookup field. Upon clicking Create, a new row appears at the bottom of the lookup table.
Delete	Allows the administrator to remove an option from the custom lookup field. Upon clicking Delete, the selected row is removed from the lookup table.

The lookup table consists of the following attributes, which must be defined when an administrator creates a new lookup:

Column	Description
Value	Indicates how the field lookup option is stored in the database.
Description	Indicates how the field lookup value appears in the Field List.
List Order	Indicates the order in which the lookup value appears for the field. Enter a numeric value for each option to determine the order of appearance. If a List Order is not defined for a Custom Lookup, the default order (alphabetical) is used.

Once all attributes are determined for the lookup, click Save and Close to commit the lookup options, and return to the Create Field window.

Once a new lookup has been defined, it appears in System Management > Field Configurations.

Field Length	Determines the length of the field. This is enabled when the Character Data Type is selected.
Decimal Places	If a numeric Data type is selected, this determines how many the number of decimal for the value.

Encrypt	This parameter determines whether the values entered in the custom field are encrypted in the database. If this check box is set to false, the values entered in the custom field are not encrypted in the database. If this parameter is set to true, the following functionality is enabled: • The data entered in the custom field is encrypted when the data is saved to the database. • The encrypted data in the database is decrypted when the custom field data is retrieved from the database, and used in the DTO. • The encrypted data displays in the Audit Log when updates are made to the custom field. The Encrypt functionality only supports Character data types. Custom fields can only be flagged as Encrypt when they are initially created. Please contact your Temenos representative, or open a case on the Client Portal to encrypt an existing custom field. Encrypted fields cannot be decrypted for reports, views, or exports. Please contact your Temenos representative, or open a case on the Client Portal to decrypt encrypted custom fields in reports, views, or exports.

- When finished entering information, click Save and Close to retain the new Custom Field, and return to the Custom Fields page. Click Cancel to return without saving.
- Custom fields are available to insert into rules.

If authoring Business Rules, it is recommended to select the **Sync.Custom Fields** button on the Application Toolbar in Rules Manager before authoring a new rule in order to ensure the newly created custom field is available within the Rules Management Application.

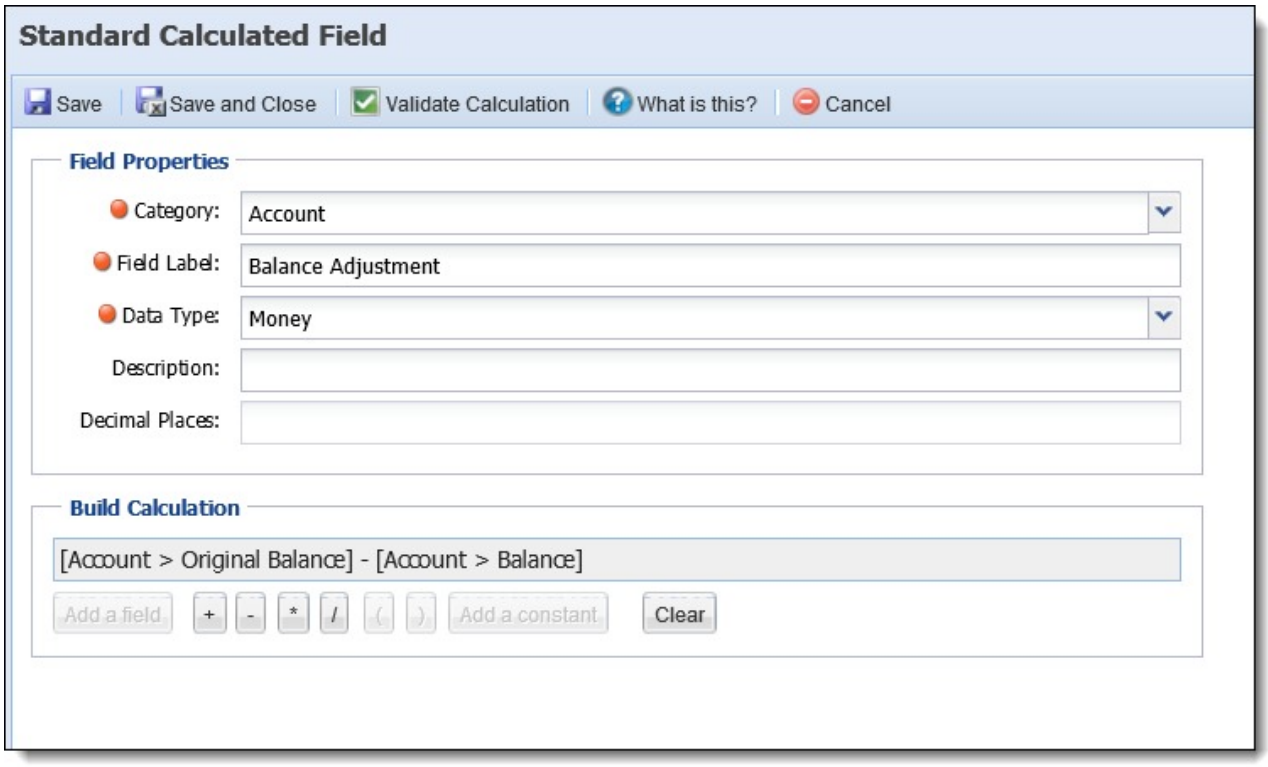
Creating a Calculated Field

Create a new field by building a calculation using one or more fields and constants. There are two types of Calculated Fields that can be created: Standard and Advanced. The operators available for use in the calculations are addition, subtraction, multiplication, division, and order of operation (i.e. parenthesis (A+B)/(C+D)). For date calculations, results are presented in days.

Calculated Fields are not able to be encrypted in the database.

To Create a Standard Calculated Field:

- Click Create. Expand the **Calculated Field** option.
- Select **Standard**. The Standard Calculation Field screen appears.



- The following fields display on the screen:

Field Name	Description
Category	Drop-down that contains a list of categories in which the custom field is located in the database.
Field Label	The name of the custom field. This is what appears in the Field List.
Data Type	Drop-down that determines the type of custom field that is being created.
Description	If necessary, provide a description of the new standard calculated field.
Decimal Places	If the Decimal Data Type is selected, this determines how many decimal places the value has. Up to 6 decimal places are supported in the Calculated Fields.

- After determining the field properties, navigate to the Build Calculation section and use the operator to build the Calculated Field. The fields that can be used in this section are determined by the Category selected. Click **Add Field** to add fields to the calculation.
- When finished building the calculation, click Validate Calculation. If the calculation is valid, a success message displays. If the calculation is not valid, an error message displays.
- Click Save and Close to retain the new Calculated Field and return to the Custom Fields page. The Calculated field is now available for use when building numerous custom features. Click Cancel to return without saving.

To Create an Advanced Calculated Field:

- Click Create. Expand the **Calculated Field** option.
- Select **Advanced**.
- A message appears indicating to contact a Temenos Customer Care Specialist to set up or modify an

Advanced Calculated Field.

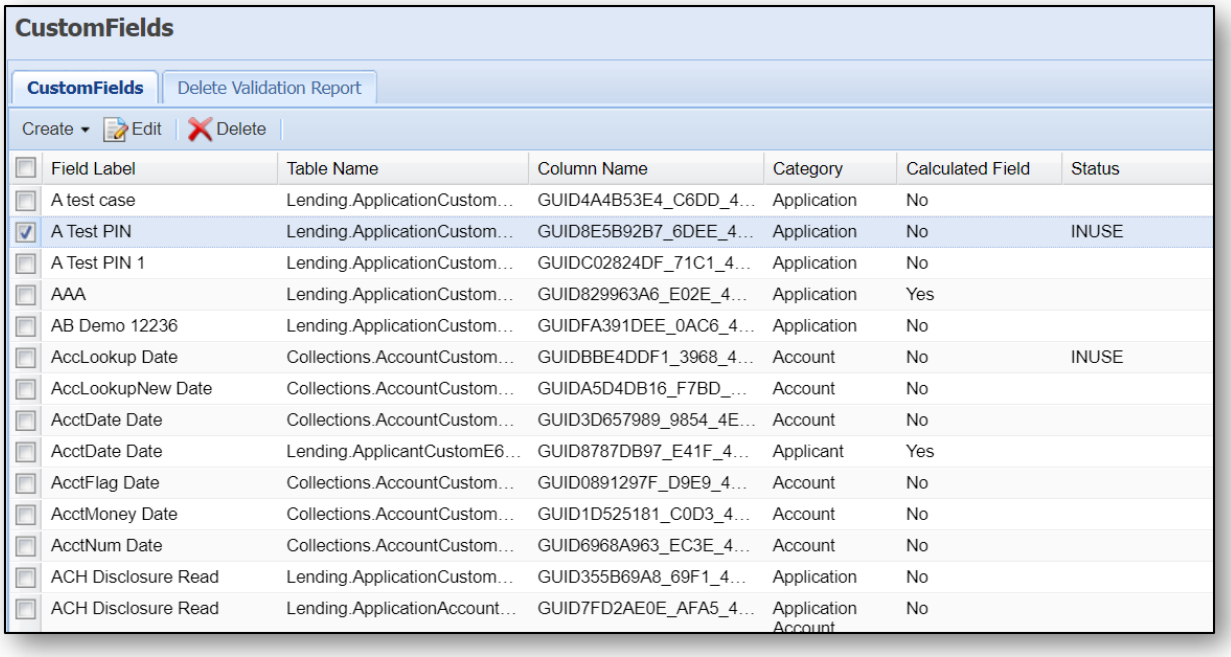
> It is important to contact Temenos prior to using the Advanced Calculated Field option. Inserting an Advanced Calculated field into a module feature with an invalid SQL Query can result in performance issues and hang the system.

Custom Field Screen

This screen provides support for deleting custom fields in the Custom Field screen of System Management.

There are two new tabs added to the existing Custom Fields screen.

- CustomFields
- Delete Validation Report



Field Label	Table Name	Column Name	Category	Calculated Field	Status
A test case	Lending.ApplicationCustom...	GUID4A4B53E4_C6DD_4...	Application	No	
A Test PIN	Lending.ApplicationCustom...	GUID8E5B92B7_6DEE_4...	Application	No	INUSE
A Test PIN 1	Lending.ApplicationCustom...	GUIDC02824DF_71C1_4...	Application	No	
AAA	Lending.ApplicationCustom...	GUID829963A6_E02E_4...	Application	Yes	
AB Demo 12236	Lending.ApplicationCustom...	GUIDFA391DEE_0AC6_4...	Application	No	
AccLookup Date	Collections.AccountCustom...	GUIDBBE4DDF1_3968_4...	Account	No	INUSE
AccLookupNew Date	Collections.AccountCustom...	GUIDA5D4DB16_F7BD_...	Account	No	
AcctDate Date	Collections.AccountCustom...	GUID3D657989_9854_4E...	Account	No	
AcctDate Date	Lending.ApplicantCustomE6...	GUID8787DB97_E41F_4...	Applicant	Yes	
AcctFlag Date	Collections.AccountCustom...	GUID0891297F_D9E9_4...	Account	No	
AcctMoney Date	Collections.AccountCustom...	GUID1D525181_C0D3_4...	Account	No	
AcctNum Date	Collections.AccountCustom...	GUID6968A963_EC3E_4...	Account	No	
ACH Disclosure Read	Lending.ApplicationCustom...	GUID355B69A8_69F1_4...	Application	No	
ACH Disclosure Read	Lending.ApplicationAccount...	GUID7FD2AE0E_AFA5_4...	Application Account	No	

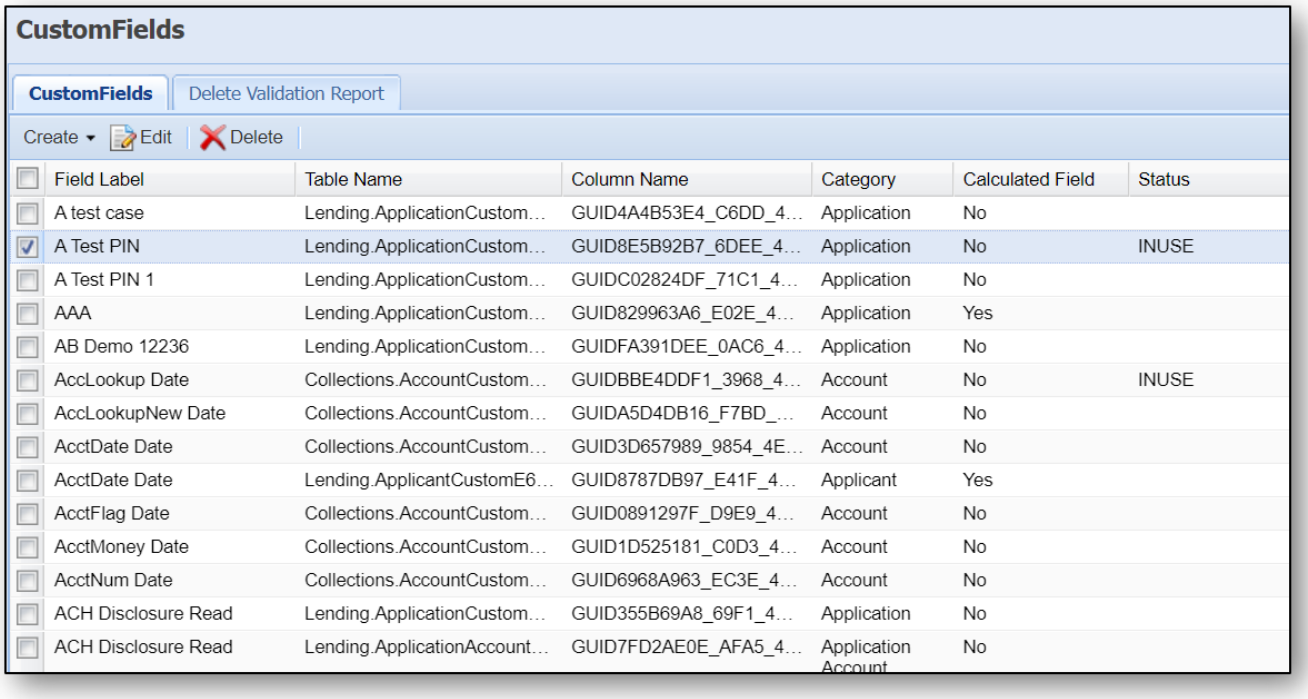
The followiing table illustrates the new tabs and their respective descriptions:

Tab Name	Description
CustomFields	Displays the existing Custom Fields view in this tab.
Delete Validation Report	Displays the areas in the system where the custom fields are in usage

Upon selecting the **Custom Fields** tab, the user can perform the following functions:

- Select the custom field to delete as shown below.

> **Delete** button is enabled when the user selects the custom field.



Field Label	Table Name	Column Name	Category	Calculated Field	Status
A test case	Lending.ApplicationCustom...	GUID4A4B53E4_C6DD_4...	Application	No	
A Test PIN	Lending.ApplicationCustom...	GUID8E5B92B7_6DEE_4...	Application	No	INUSE
A Test PIN 1	Lending.ApplicationCustom...	GUIDC02824DF_71C1_4...	Application	No	
AAA	Lending.ApplicationCustom...	GUID829963A6_E02E_4...	Application	Yes	
AB Demo 12236	Lending.ApplicationCustom...	GUIDFA391DEE_0AC6_4...	Application	No	
AccLookup Date	Collections.AccountCustom...	GUIDBBE4DDF1_3968_4...	Account	No	INUSE
AccLookupNew Date	Collections.AccountCustom...	GUIDA5D4DB16_F7BD_...	Account	No	
AcctDate Date	Collections.AccountCustom...	GUID3D657989_9854_4E...	Account	No	
AcctDate Date	Lending.ApplicantCustomE6...	GUID8787DB97_E41F_4...	Applicant	Yes	
AcctFlag Date	Collections.AccountCustom...	GUID0891297F_D9E9_4...	Account	No	
AcctMoney Date	Collections.AccountCustom...	GUID1D525181_C0D3_4...	Account	No	
AcctNum Date	Collections.AccountCustom...	GUID6968A963_EC3E_4...	Account	No	
ACH Disclosure Read	Lending.ApplicationCustom...	GUID355B69A8_69F1_4...	Application	No	
ACH Disclosure Read	Lending.ApplicationAccount...	GUID7FD2AE0E_AFA5_4...	Application Account	No	

The status column displays the field's usage in the system in the Custom Fields grid.

The below parameters are now added to the Status column.

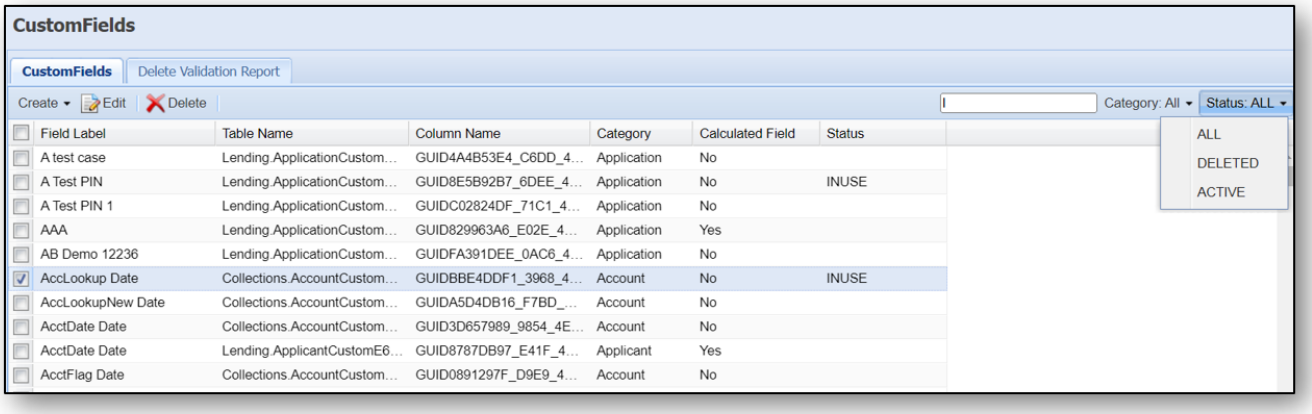
Parameter	Description
In Use	Displays the custom field which is in use in the system.
Pending	Displays the pending custom field in the system.
Deleted	Displays the custom field which was deleted from the system.

Blank is the default status for all custom fields and the parameters listed in the Status column are read only.

The user can filter the custom fields in the grid, by selecting the drop-down list as shown below.

The below are the filter options.

Filter	Description
All	Displays all custom fields in the system.
Deleted	Displays the deleted custom fields in the system.
Active	Displays all active custom fields in the system.

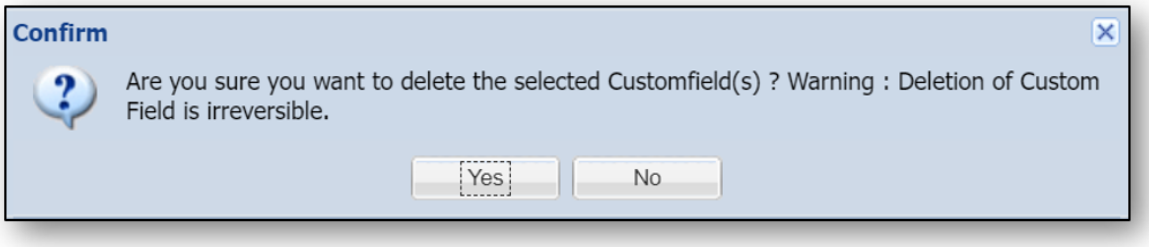


To delete the selected the custom field, perform the below steps.

- Select the custom field from the custom field grid.
- Click **Delete** button to delete the selected custom field.

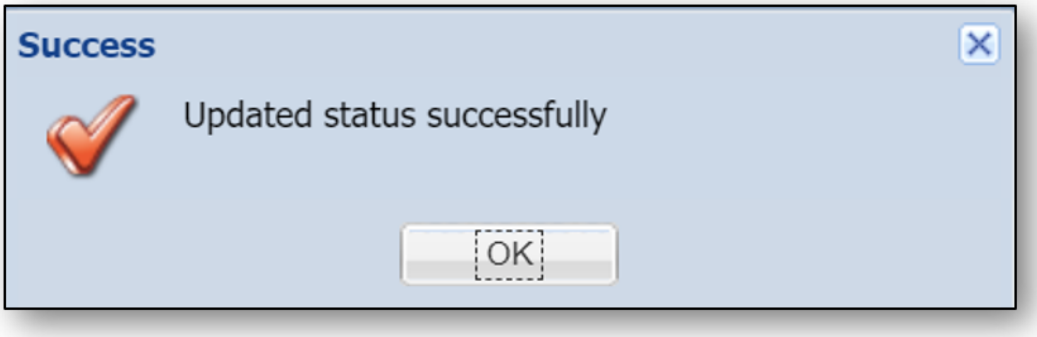
> If the custom field is in any system configuration,
>
> - If the custom field is in use then,
> - Set Status='In Use' or else,
> - Set Status='Deleted'
> - If fields have Status as 'In Use' then,
> - The Custom fields appearing in this list are manually deleted by the user from the system configuration by referring the' Delete Validation Report' to find all the areas where they are still in use.
> - The user re-runs the Delete Validation report after they have manually removed the Custom Fields to validate that the fields are removed from all configurations.

- When you click **Delete**, the following window is displayed.



- Click **Yes** to delete the selected custom field.

> When you click **Yes**, the custom field record(s) and all instance data associated with the custom field in the system is deleted and the following window displays.



The custom field(s) deleted now displays the status as 'Deleted' in the Custom Field view.

> If some of the custom fields are in use in the system when the Delete Validation Report is run, a display message informs the user that the selected custom field can not be deleted.
>
> The Delete Validation report is an overnight process which runs after the CustomFieldsRulesCheck process.

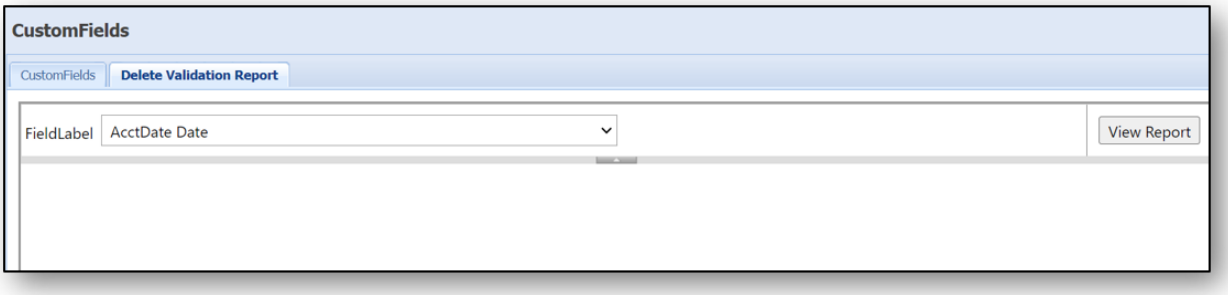
Delete Validation Report

This report is used to find all the areas where the custom fields are configured in the system.

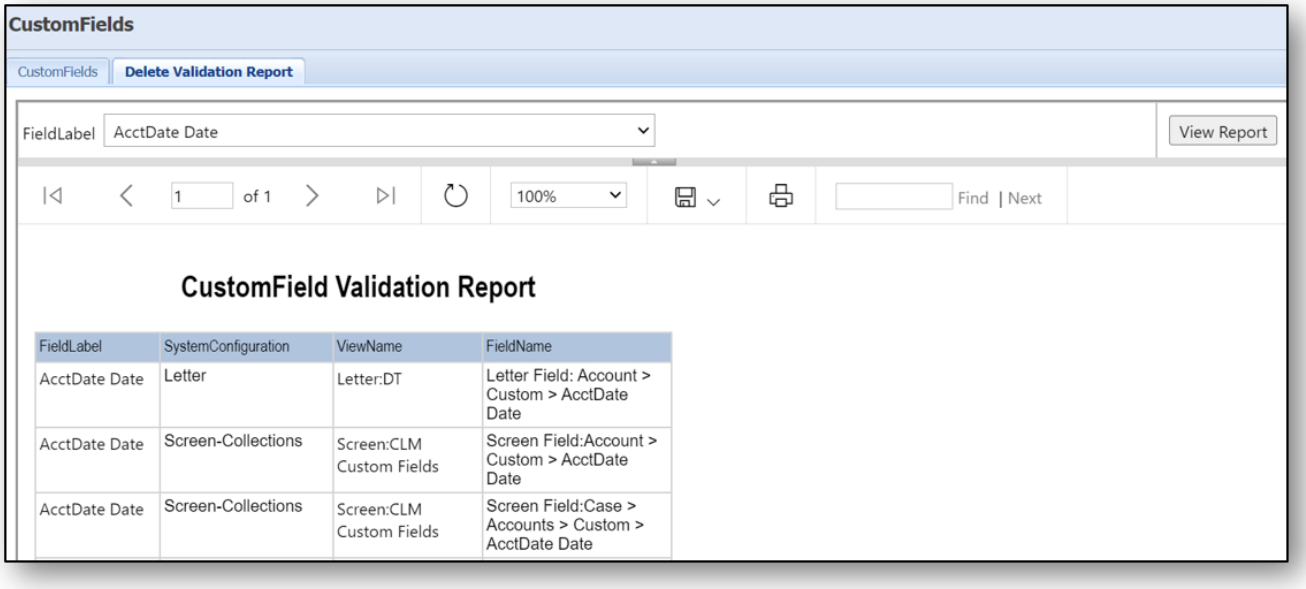
To access Delete Validation Report, click **Delete Validation Report** tab from Custom Fields view screen.

.When you click **Delete Validation Report**, the following screen displays.

- Select a custom field from the FieldLabel drop-down list.
- Click **View Report**.



When you click **View Report**, the following screen displays.



The following columns are available in the Custom Field Validation Report.

Column	Description
Field label	Displays the name of the custom field.
System Configuration	Lists out the configurations for the custom fields in the system (Views, Rules, Reports and so on).
View Name	Lists out the 'Name' returned from the lookup.
Field Name	Displays where the field is configured for each configuration in the system.

The Export button provides the option to export the report in the standard formats.

Delete Validation Report Logic

This is an overnight process, that runs after the 'CustomFieldsRulesCheck' process mentioned below under Rules. This process checks the 'CustomFieldsRulesCheck'process output to make sure that the custom field is safe for deletion.

This report checks the custom field configurations in the following:

Reports

- If the custom field is in any Report and,
  - Field tab = True or
  - Criteria tab = True
- Then return,
  - Report Name
  - Tab names where the fields are in use.

Views

- If the custom field is in any View and,
  - Field tab = True or
  - Criteria tab = True
- Then return,

    - View Name
    - Tab names where the fields are in use.

Collection Queues

- If the custom field is in any Collection Queue,
    - Criteria = True or
    - Sorting Option tab = True
- Then return,
    - Collection Queue Name
    - Tab names where the fields are in use.

Origination Email Template

- If Custom field is in any Email Template and,
    - Details Tab = True
- Then return,
    - Email Template Name
    - Tab name where the fields are in use.

Communications Emails

- If the custom field is in any Email Template and,
    - Design tab = True
- Then return,
    - Email Template Name
    - Tab names where the fields are in use.

Profile Import

- If custom field is in any Profile Import and,
    - Field tab = True
- Then return,
    - Custom Field Name
    - Display message, 'Contact Technical Support for Deletion of Custom Fields in Profile Import'.

Export

- If custom field is in Export and,
    - Field tab = True or
    - Criteria tab = True
- Then return,
    - Export name
    - Tab names where the fields are in use.

Screen (Origination, Virtual Capture, and Collections)

- If the custom field is in any Screen and,
    - Panels tab = True or
    - Interactions tab= True
- Then return,
    - Screen Name
    - Screen Panel Name
    - Screen Interactions if the field is used in any interactions.

Calculated Field

- If the custom field is a Calculated Field and,
  - Field tab = True
- Then return,
  - Custom Field Name
  - Display message = 'Contact Technical Support for Deletion of Calculated Field'

Automated Workflow

- If the custom field is in any automated workflow and,
  - Criteria = True
- Then return,
  - Workflow Name
  - Tab names where the field names is in use

Collection System Integrated Workflow Step

- If the custom field is in the Collections System Integrated Workflow Step,
  - Field tab = True
- Then return,
  - Workflow Name

Origination Workspace Summary

- If the custom field is in any Origination Workspace Summary,
  - Name = True
- Then return,
  - Workspace Name

Connectors

- Allied
  - If the custom field is in,
    - Field Mapping = True
  - Then return,
    - Connector Name
- SWBC
  - If the custom field is in,
    - User Defined Field Mappings = True
  - Then return,
    - Connector Name
- Silanis
  - If the custom field is in,
    - Custom Field Mapping = True
  - Then return,
    - Connector Name

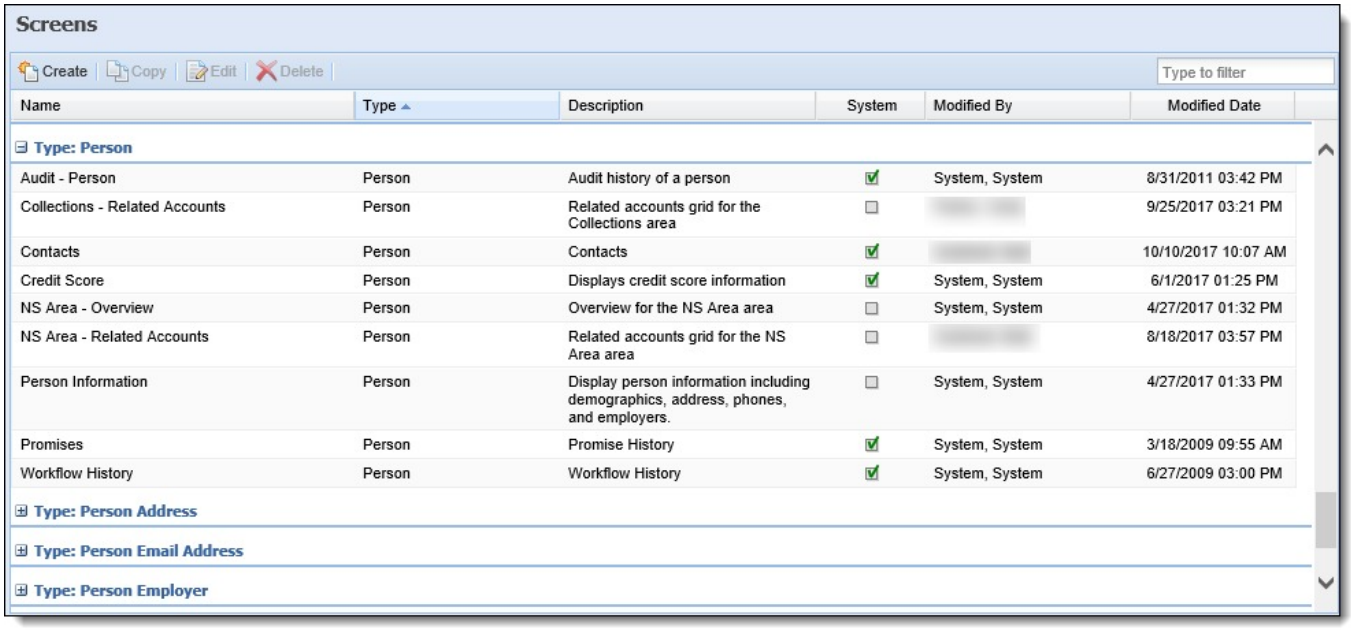
Rules

- If the custom field is in any Rule,
  - Run the 'CustomFieldsRulesCheck' overnight process to scan the rules app for the custom fields and check its output.
  - Store the Custom Fields and Rule Names in a new table in the database with an update mentioning that the rules data is from a prior date.
    - The data in this table is overwritten when the process runs next time. Hence the existing data is overwritten. Use the existing 'INRuleCustomFieldCheck.exe' as a template to create this overnight process.

- Then return,
  - Rule Names referring to the output table data from the overnight process 'CustomFieldsRulesCheck' mentioned above.

Screens

Screens allow users to create, edit, and view account, and person information. The Screens page within System Management (System Management > Screens) provides a complete list of all screens within the Collections module. From this page administrators are able to manage existing screens and define new screens that optimize usability and reduce service time.



By default, the Screens page groups and sorts all screens according to type and displays information about each screen within the following columns:

Column Name	Description
Name	Displays the name of the screen.
Type	Displays the type of the screen.
Description	If provided, displays details about the screen.
System	Displays a ☑ if the screen is system-defined.
Modified	Denotes who made the last modification.
Modified Date	Denotes the date and time of the last modification.

There are three categories of screens: System-Defined, Custom, and User-Defined.

Custom

Custom screens are coded by the financial institution, or by Temenos on behalf of the institution, and installed on the customer's site.

> Custom screens are not deployed in a Temenos Infinity general release.

System-Defined

System-Defined screens are pre-built by Temenos to provide out-of-the-box functionality and do not require (or allow) any configuration.

> The content and description of System-Defined screens, such as the Ticket Screen, cannot be modified or deleted; however, users are able to change the name of the screen, add supporting instructions, and assign security groups.

User-Defined

A User-Defined screen is created by the customer within Screens.

The following topic provides an overview of Screen attributes and instructions for creating, copying, and editing a user-defined screen.

> Each time the details within a user-defined screen are saved during the create, copy, or edit process, a screen definition including the panel layout, fields, and Editability properties is stored in the database.
> To ensure the security of the information in user-defined screens, a unique token is generated each time a manually created screen is saved in Temenos Infinity. During the save process, the token reviews the screen definition, and then reviews Editability to determine which fields are editable in the screen, and should be included in the token. Any fields from the screen definition that are not editable, or fields from the screen DTO that are not a part of the screen definition, are excluded from the token to ensure they are ignored during the save process, and prevented from being accessed in the screen.
>
> This token does not consider any fields within Grid panels that support inline editing, and only reviews the panels and fields that appear in user defined screens. Additionally, if a field only appears in a panel configured to "Always Hide," the field is not included in the token generated when the screen is saved.

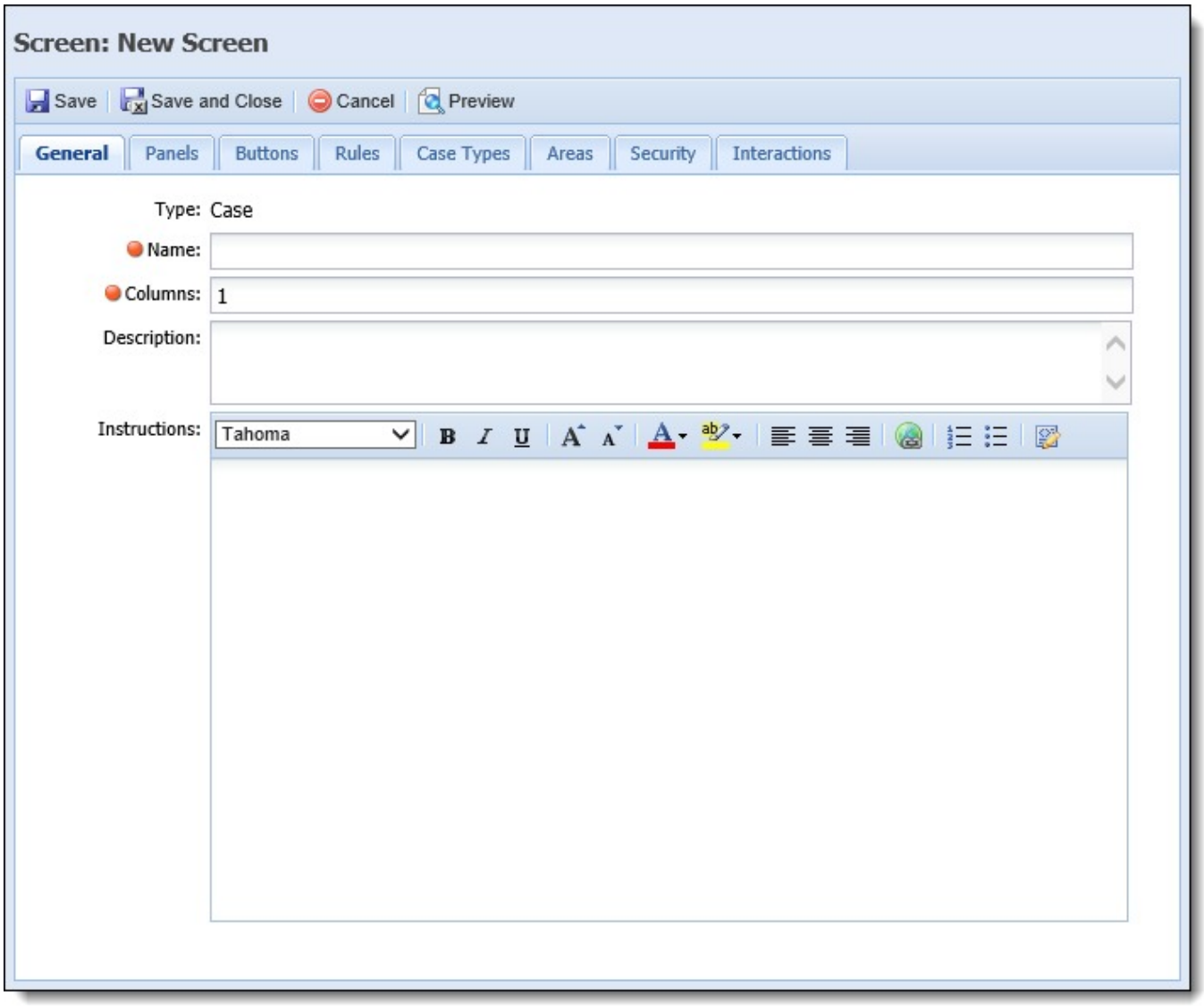
Screen Attributes

All screens share common attributes that are defined when creating, copying, or editing a screen.

> Certain attributes are not available for all screen types, if the attribute is not available it is disabled. For example, the Buttons attribute is not available for all screen types, hence the Buttons tab is disabled when the attribute is not available.

General

General attributes include the basic information pertaining to user-defined screens.



General attributes are located on the General tab:

Attribute	Description
Type	Denotes the type of screen being designed. For more information on screen types, see the Main Screens and Edit Screens sections of this guide.
Name	Enter a unique name for the user-defined screen.
Column	Enter the number of columns in which the panels display. This value may not exceed four. Hidden panels consume no space within a screen. If a screen is configured as one column, and contains a Hide Panel Interaction, panels shift up to consume the space of the hidden panel. If a screen is configured to include multiple columns, and contains a Hide Panel Interaction, panels shift to the left to occupy the space of the hidden panels; however, the panels that appear in subsequent rows do not wrap up to occupy the space thus causing blank spaces in a screen.

Description	Provide details about the purpose of the screen. The description is made available to administrators in the System Management > Screens page.
Instructions	Enter instructions for users to complete the screen. When instructions are configured for the screen, an appears within the screen header. Clicking this icon displays the instructions to the user. The instructions section may also include hyperlinks. By default, hyperlinks open within Temenos Infinity; however, hyperlinks can be configured to open in a new window. See Hyperlink Help below Hyperlink Help To configure hyperlinks to open in a new window: • Click the **Source Edit** button (last one on the right) in the Instructions toolbar. • The text entered in the Instructions field displays in the HTML Code. • Locate the code that launches the hyperlink. • Enter the following line of code immediately after the URL:**target="_blank"** • Save modifications to Instructions.

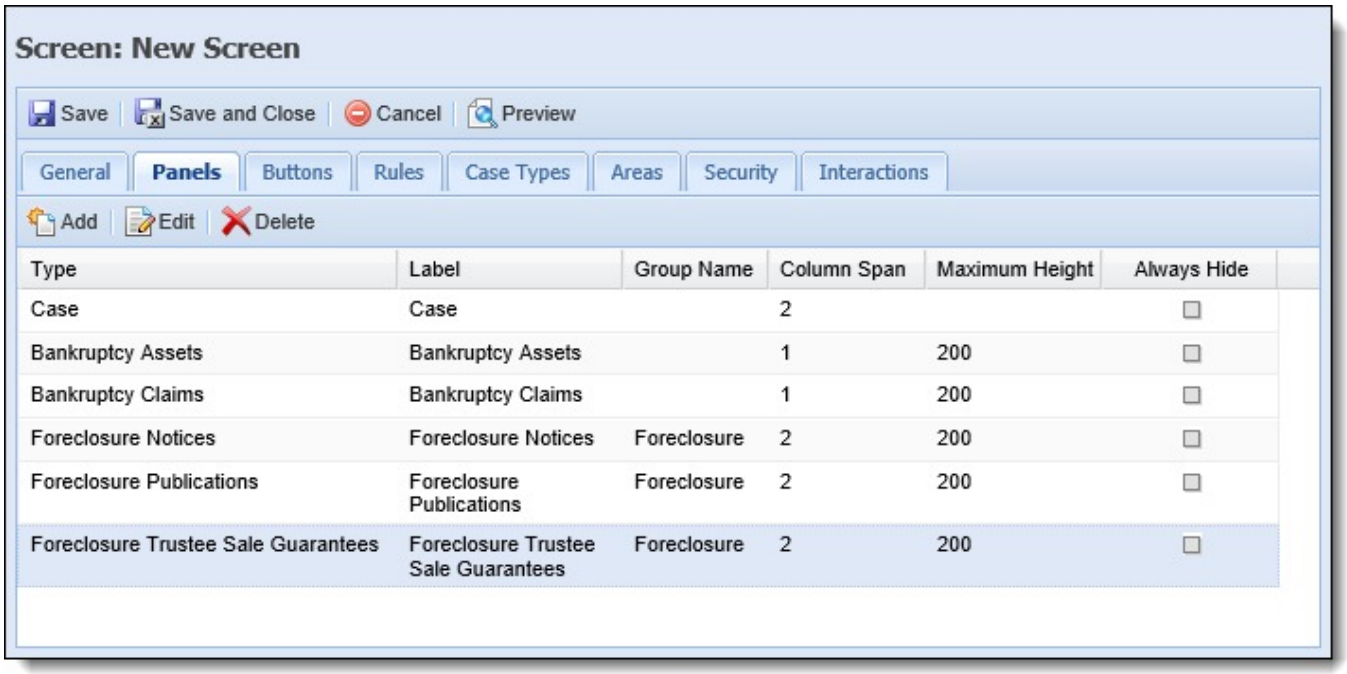
Panels

Panels are added to user-defined screens to organize screen data into logical groupings. Panels can be used not only to display information, but also to provide the ability to gather data in the Workspace, Workflow, or Case. Panels are categorized as System-Defined or User-Defined.

System-Defined panels provide pre-configured functionality that cannot be modified.

User-Defined panels have various configurable attributes, such as the title and the number of columns displayed, as well as the specific fields that appear within the panel.

For each panel configured in the screen, an overview of the panel's General attributes are displayed in a grid on the Panels tab. Administrators can also add, edit, and delete panels from the Panels tab.



Panel Types

The below table provides an overview of each panel type:

Panel Type	Description	Required Edit Screen Type	Required Fields	Can Have Multiple	System Defined
Account Screen					
Account	A panel used to capture account information.			X	
Cash Flows	A user-defined grid panel that displays all cash flows associated with the account in context.	Post-Petition Pre-Petition			
Collaterals	A grid panel used to view and edit account collaterals.	Account Collateral			
Credit Card Sub Records	A grid panel used to view and edit credit card sub records.	Account Credit Card Sub Record			
Report	A panel used to display a report.			X	X
Rich Text	A panel used to display rich text messages to users, such as instructions.			X	
Cash Flow Scheduled Payments	User-defined grid used to view scheduled payments for a cash flow.				

Cash Flow Transactions	Grid panel used to view all transactions for a petition.			X	X
Rich Text	A panel used to display rich text messages to users, such as instructions.			X	
Applicant Screen					
Associated Non-Borrower	User-defined grid used to view and edit the associated non-borrowers for an applicant.				
Account Collateral Screen					
Collaterals	A panel used to capture account collaterals.		Collateral Type	X	
Equity Analyses	A grid panel used to view, add, and edit equity analyses. Permissions must be granted at the user level in order to create and edit equity analyses. For more information, please see the Equity Analysis Panel topic of the User Guide.				
Insurances	A grid panel used to view and edit account collateral insurances.	Account Collateral Insurance			
Liens	A grid panel used to view and edit account collateral liens.	Account Collateral Lien			
Listings	A grid panel used to view and edit case collateral listings.	Account Collateral Lien			
Offers	A grid panel used to view and edit collateral offers.	Account Collateral Offer			
Sales	A grid panel used to view and edit collateral sales.	Account Collateral Sale			
Taxes	A grid panel used to view and edit collateral taxes.	Account Collateral Tax			
Valuations	A grid panel used to view and edit collateral valuations.	Account Collateral Valuation			
Account Collateral Insurance Screen					

Claims	A grid panel used to view and edit insurance claims on a collateral.	Account Collateral Insurance Claim			
Insurances	A panel used to capture insurances for a collateral.				
Account Collateral Insurance Claim Screen					
Claims	A panel used to capture insurance claims on a collateral.				
Account Collateral Lien Screen					
Liens	A panel used to capture Liens for a collateral.				
Account Collateral Listing Screen					
Listings	A panel used to capture account collateral listings.				
Account Collateral Offer Screen					
Offers	A panel used to capture account collateral offers.				
Account Collateral Sale Screen					
Sales	A panel used to capture collateral sales.				
Account Collateral Tax Screen					
Taxes	A panel used to capture collateral taxes.				
Account Collateral Valuation Screen					
Valuations	A panel used to capture collateral valuations.				
Account Credit Card Sub Record Screen					
Credit Card Sub Record	A panel used to capture account credit card sub records.				
Case Screen					
Bankruptcy Assets	A grid panel used to view and edit case bankruptcy assets.	Case Bankruptcy Asset			
Bankruptcy Claims	A grid panel used to view and edit case bankruptcy claims.	Case Bankruptcy Claim			

Bankruptcy Hearings	A grid panel used to view and edit case bankruptcy hearings.	Case Bankruptcy Hearing			
Bankruptcy Liabilities	A grid panel used to view and edit case bankruptcy liabilities.	Case Bankruptcy Liability			
Bankruptcy Parties	A grid panel used to view and edit case bankruptcy parties.	Case Bankruptcy Party			
Bankruptcy Payments	A grid panel used to view and edit case bankruptcy payments.	Case Bankruptcy Payment			
Bankruptcy Reaffirmations	A grid panel used to view and edit case bankruptcy reaffirmations.	Case Bankruptcy Reaffirmation			
Case	A panel used to capture case information.			X	
Foreclosure Notices	A grid panel used to view and edit case foreclosure notices.				
Foreclosure Publications	A grid panel used to view and edit case foreclosure publications.				
Foreclosure Trustee Sale Guarantees	A grid panel used to view and edit case foreclosure trustee sale guarantees.				
Legal Filings	A grid panel used to view and edit case legal filings.				
Legal Hearings	A grid panel used to view and edit case legal hearings.				
Legal Parties	A grid panel used to view and edit case legal parties.				
Legal Summons	A grid panel used to view and edit case legal summons.				
Parties	A grid panel used to view and edit parties for a case.				
Related Accounts	A grid panel that allows users to view, add, and remove case account relationships.				

Related Cases	A grid panel that allows users to view, add, and remove case relationships.				
Related Collaterals	A grid panel that allows users to view and edit the collaterals for a case.	Case Collateral			
Related Persons	A grid panel that allows users to view, add, and remove case person relationships.				
REO Invoices	A grid panel used to view and edit case REO invoices.	Case REO Invoices			
REO Rental Terms	A grid panel used to view and edit case REO rental terms.	Case REO Rental Terms			
Report	A panel used to display a report.			X	X
Repossession Assignments	A grid panel used to view and edit case repossession assignments.	Case Repossession Assignments			
Repossession Conditions	A grid panel used to view and edit case repossession conditions.	Case Repossession Conditions			
Repossession Locations	A grid panel used to view and edit case repossession locations.	Case Repossession Locations			
Repossession Notices	A grid panel used to view and edit case repossession notices.	Case Repossession Notices			
Rich Text	A panel used to display rich text messages to users, such as instructions.			X	
Service Request	A grid panel used to view and edit case service requests.	Case Service Request			
Case Bankruptcy Asset Screen					
Assets	A panel used to capture bankruptcy assets associated with a case.				
Case Bankruptcy Claim Screen					

Claims	A panel used to capture claims for a case.				
Case Bankruptcy Hearing Screen					
Hearings	A panel used to capture case bankruptcy hearing information.				
Case Bankruptcy Liability Screen					
Liabilities	A panel used to capture case liabilities.				
Case Bankruptcy Party Screen					
Parties	A panel used to capture parties associated with a bankruptcy case.				
Case Bankruptcy Payment Screen					
Payments	A panel used to capture case payments.				
Case Bankruptcy Reaffirmation Screen					
Reaffirmations	A panel used to capture case reaffirmations.				
Case Collateral Screen					
Collaterals	A panel used to capture case collaterals.		Collateral Type	X	
Insurances	A grid panel used to view and edit case collateral insurances.	Case Collateral Insurance			
Equity Analyses	A grid panel used to view, add, and edit equity analyses. Permissions must be granted at the user level in order to create and edit equity analyses. For more information, please see the Equity Analysis Panel topic of the User Guide.				
Case Collateral Insurance Screen					
Insurance	A panel used to capture case collateral insurances.				
Case Collateral Lien Screen					

Lien	A panel used to capture case collateral liens.				
Case Collateral Listing Screen					
Listings	A panel used to capture case collateral listings.				
Case Collateral Offer Screen					
Offer	A panel used to capture case collateral offers.				
Case Collateral Sale Screen					
Sale	A panel used to capture collateral sales.				
Case Collateral Tax Screen					
Taxes	A panel used to capture collateral taxes.				
Case Collateral Valuation Screen					
Valuations	A panel used to capture collateral valuations.				
Case Foreclosure Notice Screen					
Notices	A panel used to capture case foreclosure notices.				
Case Foreclosure Publication Screen					
Publications	A panel used to capture case publications.				
Case Foreclosure Trustee Sale Guarantee Screen					
Trustee Sale Guarantee	A panel used to capture case trustee sale guarantees.				
Case Legal Filing Screen					
Filings	A panel used to capture case filings.				
Case Legal Hearing Screen					
Hearings	A panel used to capture case hearings.				
Case Legal Party Screen					
Parties	A panel used to capture parties associated with a case.				
Case Legal Summon Screen					

Summons	A panel used to capture case summons.				
Case REO Invoices Screen					
Invoices	A panel used to capture case invoices.				
Case REO Rental Income Screen					
Rental Incomes	A panel used to capture rental incomes for a REO rental term.				
Case REO Rental Terms Screen					
Rental Incomes	A grid panel used to view and edit case rental incomes	Case REO Rental Income			
Rental Terms	A panel used to view and edit case rental terms.				
Case Repossession Assignments Screen					
Assignment	A panel used to capture case assignments.				
Case Repossession Conditions Screen					
Conditions	A panel used to capture case conditions.				
Case Repossession Locations Screen					
Location	A panel used to capture case locations.				
Case Repossession Notices Screen					
Notices	A panel used to capture case repossession notices.				
Case Service Request Screen					
Service Requests	A panel used to capture case service requests.				
Collateral Details Screen					
Liens	A grid panel used to view and edit case collateral liens.	Case Collateral Lien			
Listings	A grid panel used to view and edit collateral listings.	Case Collateral Listing			
Sales	A grid panel used to view and edit collateral sales.	Case Collateral Sale			

Taxes	A grid panel used to view and edit collateral taxes.	Case Collateral Tax			
Valuations	A grid panel used to view and edit collateral valuations.	Case Collateral Valuation			
Person Screen					
Account	A panel used to capture account information.			X	
Addresses	A grid panel used to view all addresses associated with a person	Person Address			
Case	A panel used to view case information.			X	
Email Addresses	A grid panel used to view and edit a person's email addresses.	Person Email Address			
Employers	A grid panel used to view and edit a person's employers.	Person Employer			
Financial Statements	A grid panel used to view and edit a person's financial statements.				
Messages	A panel used to display good, bad, warning, or information messages regarding the person in context. The messages within this panel are driven by Business Rules configured under the Presentation category in System Management > Collections > Rules Management. For more information regarding rule configuration for the Messages panel, please see Properties within the Panels section of this topic.			X	
Notepad	A panel used to view and edit free-form comments.				
Payrolls	A grid panel used to view and edit a person's payrolls.	Person Payroll			

Person	A panel used to capture person information.			X	
Phones	A grid panel used to view and edit a person's phone numbers.	Person Phone			
Phone Classification History	A grid panel used to view phone classification history information for the person in context.				X
Promise History	A panel used to view promise history information. Promises displayed may be edited, but not added. Promises are added by running a workflow and cannot be added directly through a screen.				X
Related Accounts	A grid panel used to view related accounts. If restricted persons are related to an account, the account does not display in the Related Accounts panel.				
Related Cases	A grid panel used to view cases related to a person. If restricted persons are related to a case the case does not display in the Related Cases panel.				X
Related Loan Applications The Loan Origination module must be active in order to access this panel.	A grid panel used to view loan applications related to a person, based on the person's TIN in the Loan Origination module.				X
Related Persons	A grid panel used to view persons related to a person. If a person is restricted, they do not display in the Related Persons grid.				X

Report	A panel used to display a report.			X	X
W2's	A grid panel used to view and edit a person's W2's.	Person W2			
Workflow History	A grid panel used to view workflow history.				X
Person Address Screen					
Person Address	A panel used to capture person address information.		Address Type	X	
Rich Text	A panel used to display rich text messages to users, such as instructions.			X	
Person Email Address Screen					
Email Addresses	A panel used to capture person email address information.			X	
Person Employer Screen					
Person Employer	A panel used to capture a person's employer information.			X	
Person Financial Statement Screen					
Person Financial Statement	A panel used to capture a person's financial statement information.			X	
Person Payroll Screen					
Person Payroll	A panel used to capture a person's payroll information.			X	
Person Phone Screen					
Person Phone	A panel used to capture a person's phone information.		Phone Type	X	
Rich Text	A panel used to display rich text messages to users, such as instructions.			X	
Person W2 Screen					
Person W2	A panel used to capture a person's W2 information.			X	

If a host has write-back capabilities, using a screen with the Change Address panel and Ticket Property fields of the Ticket panel can capture an address change in real-time.

Administrators are prevented from assigning multiple instances of the same grid-panel to a screen.

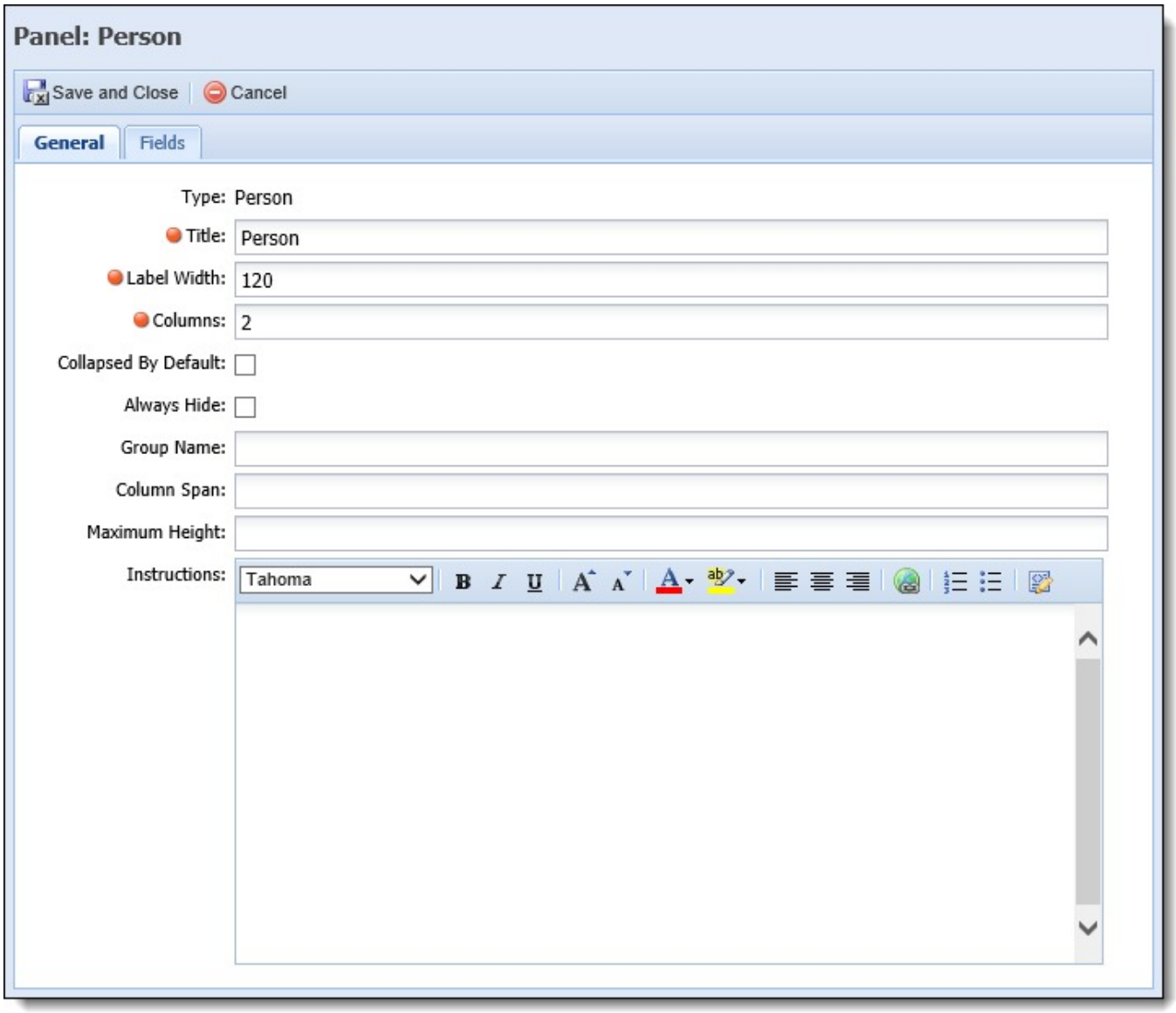
The following attributes can be defined while adding, copying, and/or editing panels:

- General
- Fields
- Edit Screens
- Columns
- Properties
- Report Parameters

General

General panel attributes allow administrators to edit the appearance of the panel as well as provide instructions to users.

Depending on the type of panel being configured, additional fields may appear within the General tab. Please see the table below for more information.

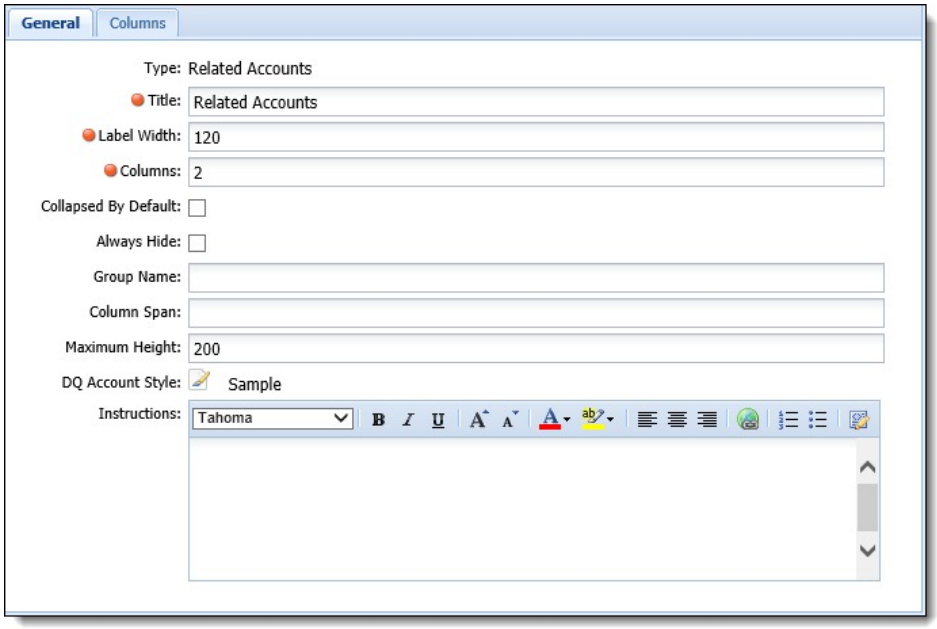


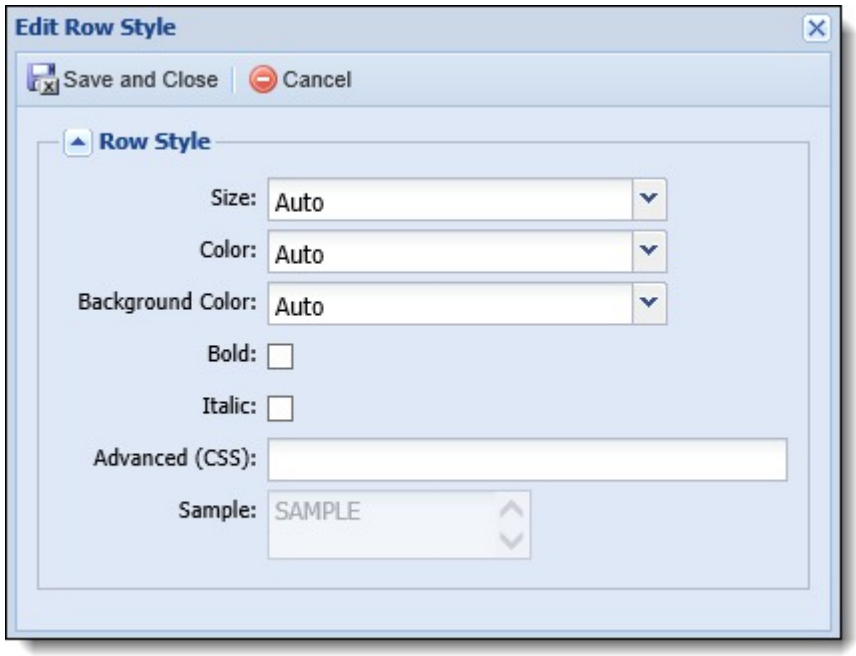
The General panel attributes are defined within the following fields on the General tab for each panel type:

Field Name	Description
Title	Enter the title assigned to the panel within the user-defined screen.
Reports	Select a value from the drop-down list to identify the report to populate within the Report panel. This drop-down includes a list of all system-defined and custom reports configured for the institution within the Reports page in the Ribbon Bar. This field is only available within the Edit panel window when configuring the Report panel to appear in a screen.
Label Width	Enter the maximum number of pixels the label width is not to exceed. The lower the number, the more area available for entries in the associated fields. Label Width defaults to 120 pixels and may not exceed 1000 pixels.

Columns	Enter the number of columns in which fields are organized. At least one column must be added, but no more than four columns can be added to a panel. Hidden fields consume no space within the panel. If a one-column panel is configured on a screen containing a Hide Field Interaction, fields shift up to consume the space of the hidden field. If a multiple-column panel is configured on a screen containing a Hide Field Interaction, fields will shift to the left to occupy the space of the hidden fields; however, the fields that appear in subsequent rows do not wrap up to occupy the space, thus causing blank spaces in a panel.
Collapse By Default	Select the check box if this panel is to be collapsed by default. This functionality is only applied to the panel when the screen is loaded for the first time in the workspace, or when the screen is loaded from the Screens tab in the Left Navigation Panel.
Always Hide	Select the check box if this panel is never to be displayed on a screen. The Always Hide attribute facilitates Interactions functionality. If a panel is always hidden, the fields within the panel are available in the Interactions' condition and expression builder. For more information on the condition and expression builder, please refer to the Interactions section within this topic.
Group Name	If desired, enter the name of group that the panel is to be grouped in. All panels sharing the same Group Name are grouped into a tab layout. Users may select the tab to access the panel. Group Name is case sensitive. The location of the tab panel corresponds to the order of the panels in that group tab.
Column Span	Enter the number of columns a panel spans within a screen. The value of this field cannot exceed four. If a screen is configured to contain two columns and a panel is configured to span two columns, the panel will span the entire screen width. If a screen is configured to contain four columns and a panel is configured to span two columns, the panel will span half the screen width.

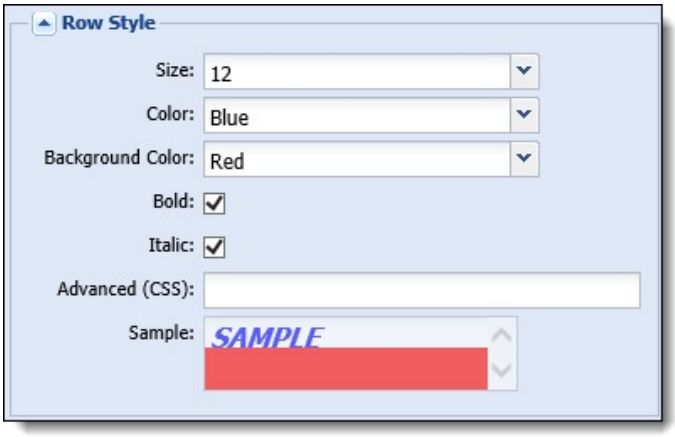
Maximum Height	Enter the maximum number of pixels the panel height may not exceed. For grid panels, the default value is 200 pixels. If a grid contains a large number of records and the value of this field is blank or larger than 200, some records in the grid may be unreadable as no scroll bar is present. If this value is set to over 500 pixels, an error is returned upon saving the panel indicating a value of 500 or less must be entered in this field.

DQ Account Style	Click the to determine the background color and style of text that displays in the row for each delinquent account in the Related Accounts panel. This field is only available within the Edit panel window when configuring the Related Accounts panel to appear in a Person screen. If no style is configured, the row for each delinquent account is displayed with a white background and black text, to align with all other accounts in the Related Accounts panel. If a style is applied to one or more columns in the Related Accounts panel, the style configured in the Columns tab takes precedence over the style configured for Delinquent Accounts. The Delinquent Indicator field must be configured as a column in the panel in order for the DQ Account Style configurations to be applied when the panel renders in the workspace. Reference the section below for an overview of the style parameters that are available to set for delinquent accounts in the Related Accounts panel: ▶ DQ Account Style To edit the style of delinquent accounts in the Related Accounts panel: • Click the for the DQ Account Style parameter in the General tab.  • Upon clicking , the Edit Row Style window appears:

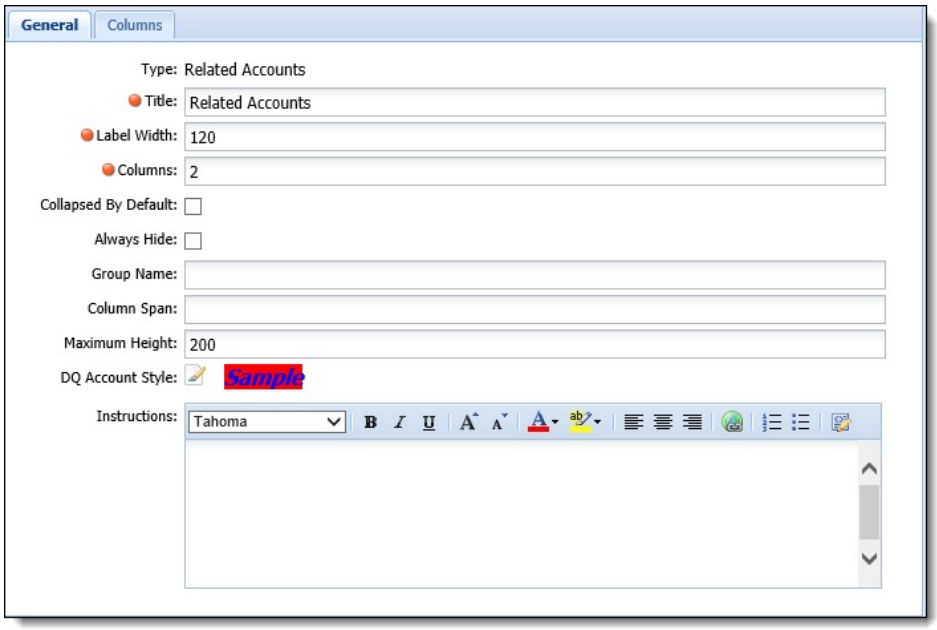


- Within the Edit window, define the following style parameters:

Parameter	Description
Size	Select a size for the field value text from the drop-down list. This parameter defaults to Auto, but can be changed to size 7 through 16.
Color	Select a color for the field value text from the drop-down list. This parameter defaults to Auto (black), but can be changed to one of the following: ○ Blue ○ Green ○ Red ○ Orange
Background Color	Select a background color for the panel row from the drop-down list. This parameter defaults to Auto (black), but can be changed to one of the following: ○ Blue ○ Green ○ Red ○ Orange
Bold	Select this check box to bold the field value text.
Italic	Select this check box to italicize the field value text.
Advanced (CSS)	Enter CSS code to define the field value style attributes. The CSS code entered in this text box overrides any other value style attributes selected within the window.

Sample	The "Sample" text in this box changes dynamically as style attributes are selected to provide a preview of how the text appears on the screen. For example:  This box cannot be edited.

- When all parameters are defined, click Save and Close to retain the style configurations, and return to the General tab.
- The Sample text for the DQ Account Style parameter updates to display the configured style attributes, as shown in the below example:



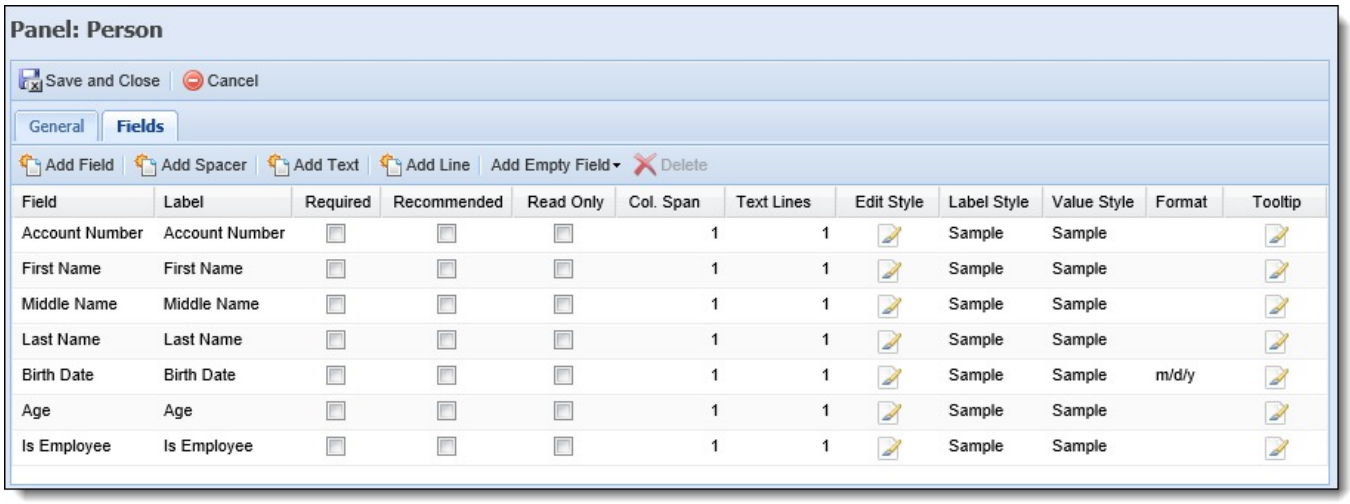
Instructions	Enter a Rich Text set of instructions to assist users complete the panel. The instructions section may also include hyperlinks. By default, hyperlinks open within Temenos Infinity; however, hyperlinks may be configured to open in a new window. For more information on configuring hyperlinks to open in a new window, see Hyperlink Help.

It is recommended to consider the following tips when configuring fields to appear in screen panels:

- When a collateral is being added, a value is required for Collateral Type; therefore, it is recommended to add the Collateral Type field as required on the following panels:
  - Collaterals panel on an Account Collateral screen (Account > Collaterals > Collateral Type).
  - Account panel on a Person screen (Person > Account > Collaterals > Collateral Type).

Fields

A field is a data element stored in the database, which corresponds to a record type compatible with the selected panel type. Fields can be added to a panel, on the Fields tab, while configuring a screen to allow users to view and change data. For example, a contact panel on a person screen is configured to include a phone number field, which allows users to view and change the phone number.



Field	Label	Required	Recommended	Read Only	Col. Span	Text Lines	Edit Style	Label Style	Value Style	Format	Tooltip
Account Number	Account Number				1	1		Sample	Sample		
First Name	First Name				1	1		Sample	Sample		
Middle Name	Middle Name				1	1		Sample	Sample		
Last Name	Last Name				1	1		Sample	Sample		
Birth Date	Birth Date				1	1		Sample	Sample	m/d/y	
Age	Age				1	1		Sample	Sample		
Is Employee	Is Employee				1	1		Sample	Sample		

Field attributes provide administrators with the ability to configure the panel content and style by taking the following actions while adding a panel:

Button	Description
Add Field	Enables users to select the fields to be added to the panel from the field list. A field may be added to a screen multiple times, within separate panels. When a field exists on a screen more than once, all instances of the field is synchronized. For example, if the Membership Start Date field exists three times on a screen and a user updates the first instance of the field, the other two instances of the field update to reflect the new value. If a field exists on a screen more than once, only once instance of the field may be saved/posted at once. If a field appears more than once on a screen, and both instances are updated, a server error occurs. For example, if the First Name field exists on a screen twice, and the user updates both instances of the field, an error is received during the save process.
Add Spacer	Enables users to add spacer fields to the panel. Spacer fields help organize and align fields into logical groupings.
Add Text	Enables users to add text fields to the panel. Text fields help organize panels into logical groupings by serving as headings within a panel. Text fields display information in bold font.

Add Line	Enables users to add a blank line that spans the width of a panel. Line fields help organize fields into logical groupings.
Add Empty Field	Enables users to add an empty field to a panel. Empty Fields do not represent actual system fields, and are not stored in the database. Upon clicking this button, a drop-down list appears, which prompts users to select the type of empty field to be added:

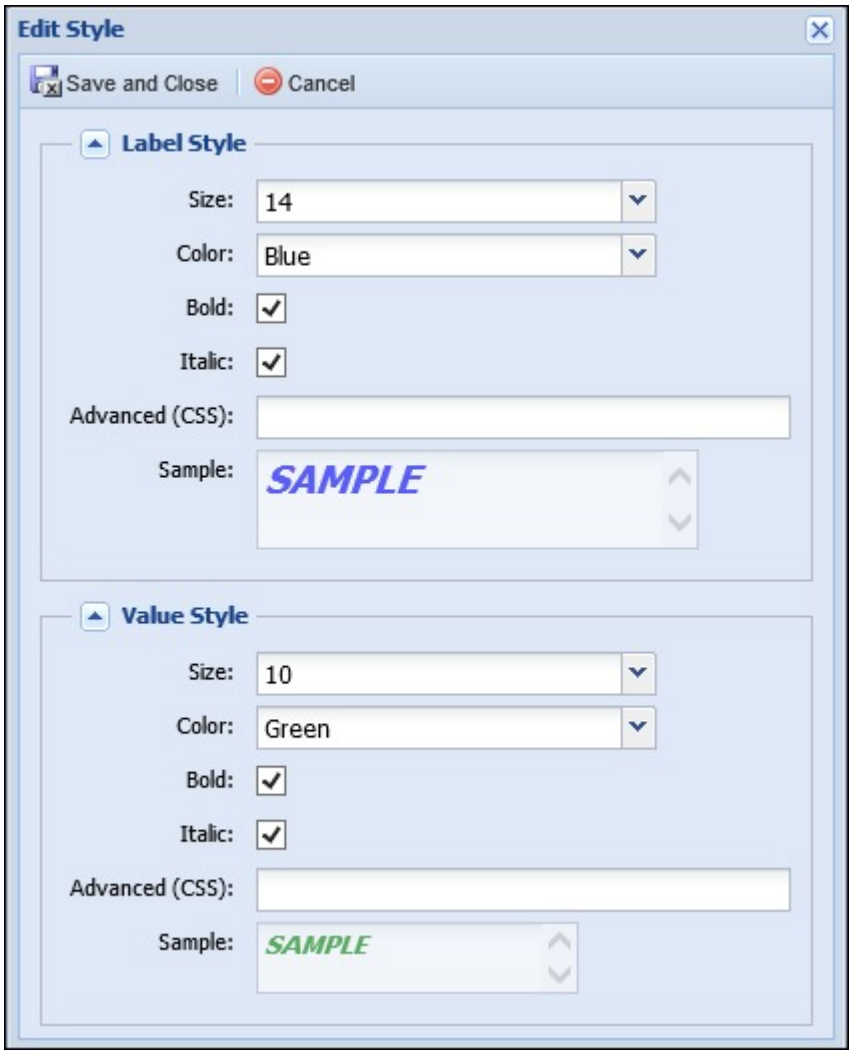
Empty Field Type	Description
Character	Empty field that accepts all data types.
Date	Empty field that allows users to select a date from the date picker.
Decimal (0.0)	Empty field that only allows numbers to be input in the 0.0 format.
Decimal (0.00)	Empty field that only allows numbers to be input in the 0.00 format.
Decimal (0.000)	Empty field that only allows numbers to be input in the 0.000 format.
Flag	Empty checkbox field.
Money	Empty field that only allows numbers to be input in the $0.00 format.
Number	Empty field that only allows numbers to be input, with no decimal places.

The Fields attributes are only available when a user-defined panel is being created. If the Fields tab is available, at least one field must be assigned to the panel. For more information on user-defined panels and the screens that support them, please see the list of available Panel Types.

The Field attributes are defined within the fields grid:

Attribute	Description
Field	A read-only column that displays the field selected.
Label	Enter the title of the field to be displayed within the user-defined panel/screen. This attribute accepts up to 500 characters.
Required	Select this check box if the field must be completed in order to continue. Required fields display a ● to the left of the field label and must be completed in order to save the screen. Marking fields as Required enables institutions to enforce the input of a value occur and prevents blank records from being saved.

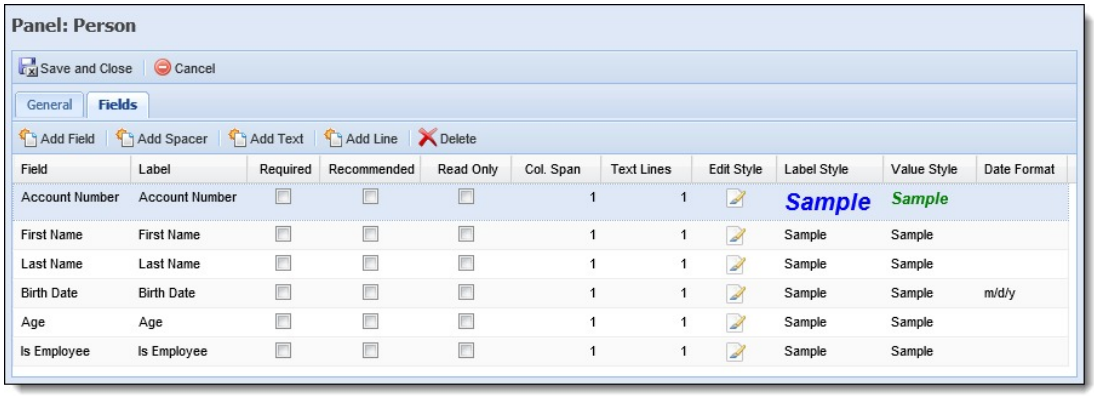
Recommended	Select this check box if the completion of a field is suggested. Recommended fields display a ⚠ to the left of the field label which indicates to the user that a value, if available, should be entered in the field before saving the screen. Although the screen can be saved if recommended fields are left blank, this functionality can be beneficial in ensuring all information is obtained.
Read-Only	Select this check box to restrict the user from editing the value contained within the field.
Col. Span	Enter the number of columns the field spans within a panel. The value of this field may not exceed four.
Text Lines	Enter the number of lines the field and its corresponding entry encompass.

Edit Style	Click to open the Edit Style window where the Label and Value text for each field can be edited. Reference the section below for an overview of the style parameters that are available to set for panel fields: ▶ Edit Style The icon within the Edit Style column provides administrators with the ability to define Label Style and Value Style attributes for a field. Clicking opens the **Edit Style** window:  The following Style attributes are defined within the Edit Style window:

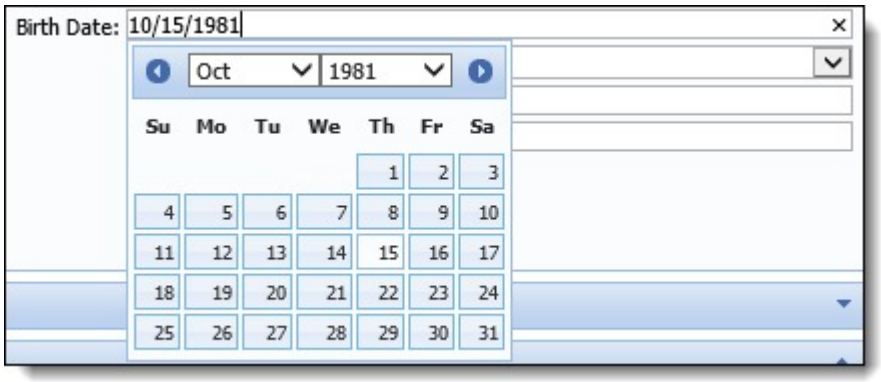
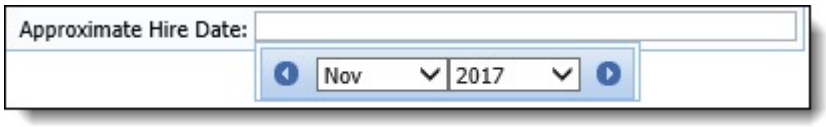
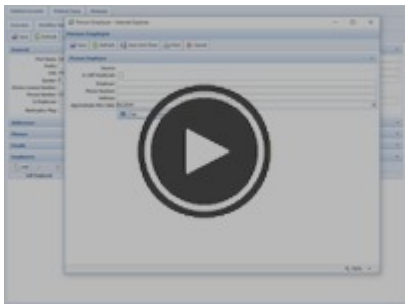
Field	Description
Size	Select a size for the label and value text. Auto or size 7 through 16 can be selected.
Color	Select a color for the label and value text. Auto (black), Blue, Green, Red or Orange can be selected.
Bold	Select this checkbox to bold the label and value text.
Italic	Select this checkbox to italicize the label and value text.

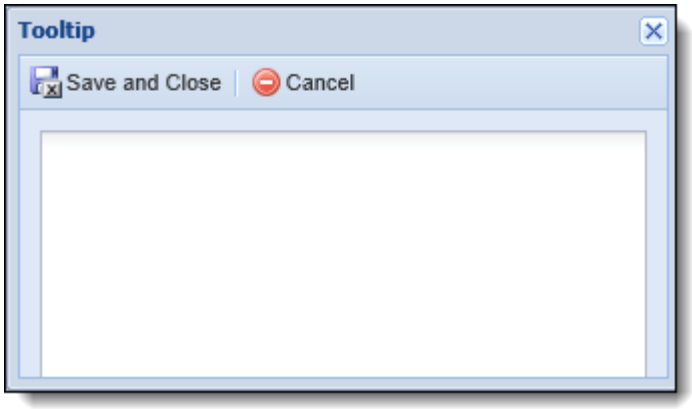
Advanced (CSS)	Enter CSS code to define the label style and value style attributes. CSS code entered in this text box overrides any other Label or Value style attributes chosen.
Sample	The "Sample" text in this box changes dynamically as style attributes are chosen to provide a preview of what the text will look like on a screen. This box cannot be edited.

Upon saving the style attributes, samples of the Label Style and Value Style are displayed within the grid.



Label Style	A non-editable column that allows the administrator to preview the Label text style defined in the Edit Style window.
Value Style	A non-editable column that allows the administrator to preview the Value text style defined in the Edit Style window.

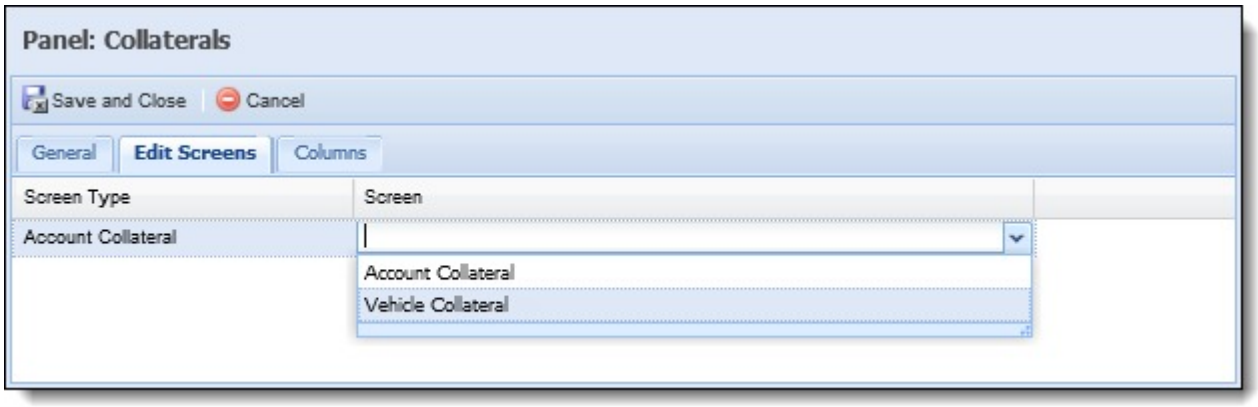
Format	Select the format to be applied to a date field in the panel. This field defaults to a format of m/d/y for all date fields, but can be changed to a format of m/y using the drop-down list. This column only applies to fields with a DATE data type in the database. A blank value populates within this column for all non-date fields, as well as all date fields with a data type of DATETIME, CLIENTDATE or CLIENTDATETIME. If set to m/d/y, users are able to select a month, day, and year for the field, and the date populates in the following format: 11/02/2017. When set to m/y, users are only able to select a month and year for the field, and the date populates as follows: 11/2017. Reference the following section for an overview of how these date formats appear in an application: ▸ Date Formats in Workspace Screens If a date field is set to a format of m/d/y, when the field is selected in a screen, users are able to select a date from the following calendar:  When set to a format of m/y, the following calendar appears to allow users to select only the month and year for the field value:  To see these date formats in action, watch the following video: 

	Date field values are saved in a m/d/y format in the database; therefore, if a date field is assigned a format of m/y, the value of the day is automatically set to the first day of the month in the database. For example, a date of 06/2015 is saved as 06/01/2015 in the database. When fields are imported, and the date format of the field is set to m/y, the date is displayed in m/y format in the panel, but the actual value of the day is saved in the database. For example, if a field value is 07/16/2017, when the field is imported, the value is displayed as 07/2017 in Temenos Infinity, but is saved as 07/16/2017 in the database. If the field value is modified in Temenos Infinity, the value of the day is updated to the first day of the month in the database (ie. 07/01/2017).
Tooltip	An editable column that allows the administrator to enter a description or directions for each field added to a panel. Click to open the Tooltip window where text can be entered to provide information about the field in the screen. Reference the following section for an overview of the Tooltip window: Tooltip Upon clicking the Tooltip window opens. In this window, define the text to appear for the field.  Once the desired text has been entered, click Save and Close. The following list provides an overview of information to consider when configuring a tooltip: • A tooltip may consist of up to 300 characters. • Double quotes (") should not be used in a tooltip. If desired, use single quotes (') to highlight text in the tooltip message. When a tooltip is configured for a field, a displays next to the field label in the screen. Click to reveal the tooltip.

Edit Screens

Edit Screens provide the ability to edit a record displayed in a grid panel, as well as to view additional detail information not displayed in the panel. This feature allows an institution to only display key information in a panel to reduce scrolling while but still provide the ability to view and edit all pertinent information on a record by double-clicking a grid record.

Edit Screen attributes allow an administrator to select the screen that opens when an end-user double-clicks a record within the grid panel to view more information, update information, or add a new record.



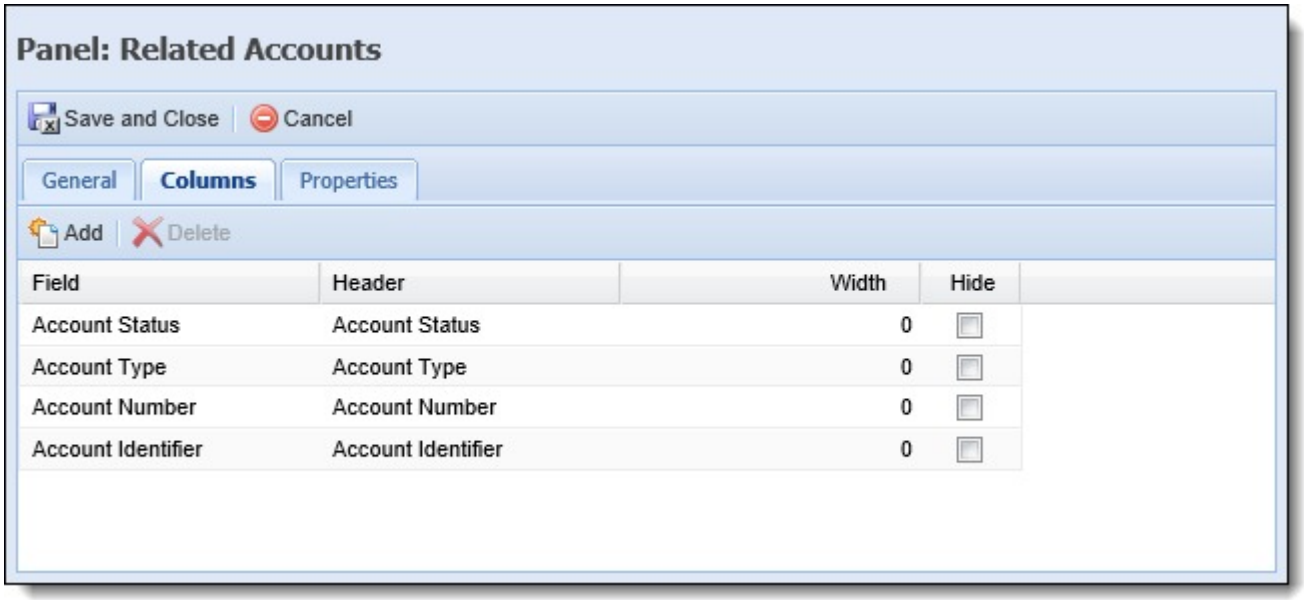
The below Edit Screen attributes are defined within the grid that displays in the Edit Screens tab:

Attribute	Description
Screen Type	A read-only attribute that displays the screen type available to be selected as the Edit Screen.
Screen	Select the Edit Screen that opens when an end-user adds or updates information within the panel. This drop-down only displays screens matching the screen type associated with the panel.

The Edit Screen attribute is only available for grid panels. For more information about grid panels and thCe screens that support them, please see the list of available Panel Types.

Columns

Column attributes enable administrators to customize the columns that appear within the grid panel.



The below Column attributes are defined within the Columns tab:

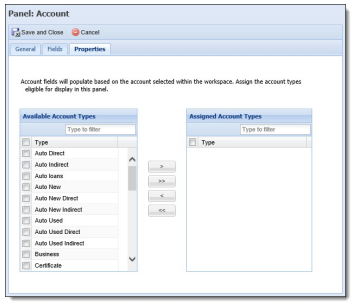
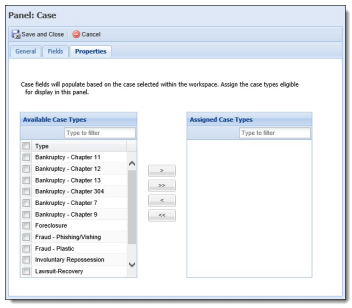
Attribute	Description
Field	A read-only attribute that displays the column selected.
Header	Enter the title of the column to be displayed within the user-defined panel/screen.
Width	Select the default pixel width of the column.
Hide	Select the check box if this column is never to be displayed within the panel. The Hide attribute facilitates Interactions functionality. If a column is always hidden, the column is available in the Interactions' condition and expression builder. For more information on the condition and expression builder, please refer to the Interactions section within this topic. At least one column must be visible in the panel.

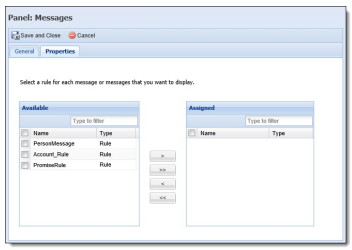
Properties

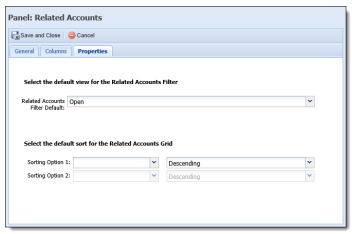
Property attributes only display when configuring Account, Case, and Messages panels on Person screens.

Property attributes for a panel are defined within the Properties tab. The appearance and behavior of this tab differs by panel type. Depending on the panel being configured, this tab may provide system administrators with the ability to determine the visibility of the panel for a specific account type

The following table provides an overview of each panel that supports the properties attribute, including a description of the functionality configured within the Properties tab for each panel, and example of how the tab appears for the panel:

Panel	Properties Configuration	Example
Account	Allows administrators to assign account types configured in System Management > Account Types to the panel.	
Case	Allows administrators to assign case types configured in System Management > Collections > Case Types to the panel.	

Messages	Allows administrators to assign rules to the panel. The rules assigned to the message panel execute when the screen is opened or refreshed. If the assigned rules result in displaying content, the content displays within the panel. In order to assign rules to the Messages Panel, the ability to author Business Rules must be enabled for the financial institution. For more information about Rules, please see the Rules Management section of this guide.	

<table>
<tr>
<td>Related Accounts</td>
<td>
Allows administrators to configure the following parameter, which determine how related accounts display by default in the Related Accounts panel:
<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>Related Accounts Filter Default</td><td>Allows the administrator to select the default filter that is applied to the Related Accounts panel. Within this drop-down list, users are able to select the following options:
• All Accounts
• Open
• Open Liable
• Delinquent
• Delinquent Liable
• Closed
By default, this parameter is set to Open.</td></tr>
<tr><td>Sorting Option 1</td><td>Allows the administrator to sort the grid based on a field that has been configured in the Columns tab.
If no fields have been configured within the Columns tab, no options are available in this drop-down list.
Once a field is selected, the administrator is able to determine whether the grid is sorted in Ascending or Descending order.
By default, the sorting option is set to Descending.</td></tr>
<tr><td>Sorting Option 2</td><td>Allows the administrator to select a secondary sorting option that is based on a field that has been configured in the Columns tab.
This parameter is disabled if a selection has not been made in Sorting Option 1.
The field selected in Sorting Option 1 is not an available option within this parameter.</td></tr>
</table>
Institutions are not required to identify a Sorting Option.
</td>
<td> 
</td>
</tr>
</table>

Report Parameters

Report Parameter attributes only display when configuring Report panels on Account, Case, and Person screens. Report parameter attributes for a panel are defined on the Report Parameters tab.

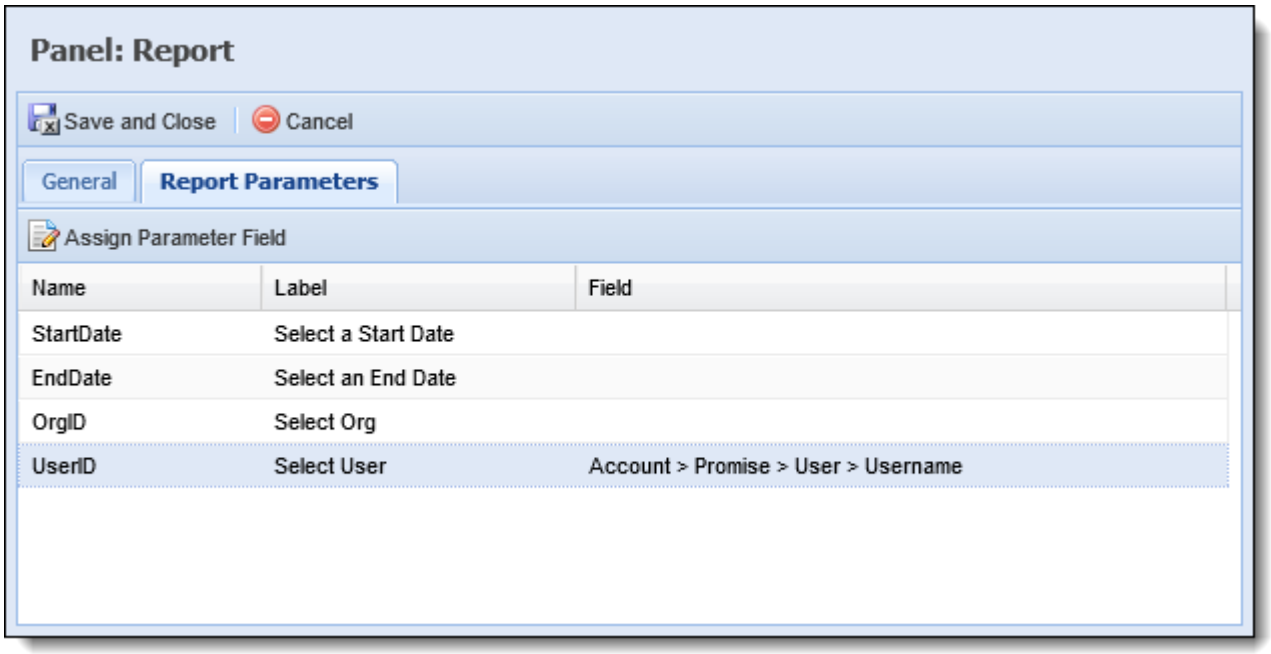
The Report Parameters tab allows administrators to define the fields that are used as the default report criteria. Assigning parameter fields when creating the panel provides the ability for administrators to determine the account, case, and person fields from which report data is pulled and eliminates the need for users to manually select parameters at runtime.

For example, the User ID parameter can be defined for the Promises To Pay (Person) report. Upon selection, the administrator is able to choose the field in which the User ID is stored at the Account > Promise level on the account. When the panel and report renders in the workspace, the data displayed in the report would default to include the value in the selected field for the person/account in context.

Defining parameter fields is optional. If parameter fields are not defined, the parameters are presented to the user for selection when the panel and report is rendered in the workspace.

The parameters populate within the Report Parameters tab based on the report selected for the panel within the General tab.

To ensure the entire report is displayed in the panel when rendered in the workspace, set the Maximum Height to 1500 on the panel's General tab.

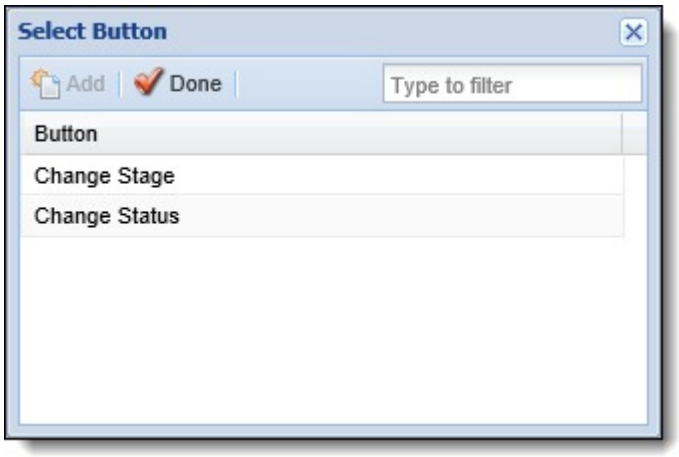


When a field is double-clicked, the Field Selector closes automatically. When selecting a field and clicking Add Field, the Field Selector must be closed manually by clicking Close.

Buttons

The Buttons attribute is available when configuring attributes for Case screen types.

Buttons provide the ability to perform an action directly within a screen. Button attributes enable administrators to add and delete screen buttons, as well as customize the button label that appears within the screen.



The following Button attributes are defined on the Buttons tab:

Attribute	Description
Button	Displays the name of the Button. This attribute is read-only.
Label	Enter the button label to appear within the application. To add a custom label, click within the **Label** column of the corresponding button and add custom text.

Available Buttons

The below table provides an overview of the buttons that are available for each screen type.

Button	Description
Finalize Recovery Account	Provides the ability to end the life cycle of a recovery account. Clicking this button performs validations to confirm that the sum of the recovery ledger balances equals zero and that the recovery account does not have any component balances with a fractional amount below a penny. If the recovery account passes the validations, the Recovered Date is set to today's date.
Case Screens	
Change Stage	Provides the ability to change the stage of a case. Clicking this button displays a Change Stage window that allows a user to select the desired Case Stage from a drop-down. Values in the drop-down are configured in the CASE_STAGE lookup defined in System Management > Field Configurations.
Change Status	Provides the ability to maintain the status of a case. Clicking this button displays a Change Status window that allows a user to select the desired Case Status from a drop-down. Values in the drop-down are configured in the CASE_STATUS lookup defined in System Management > Field Configurations.

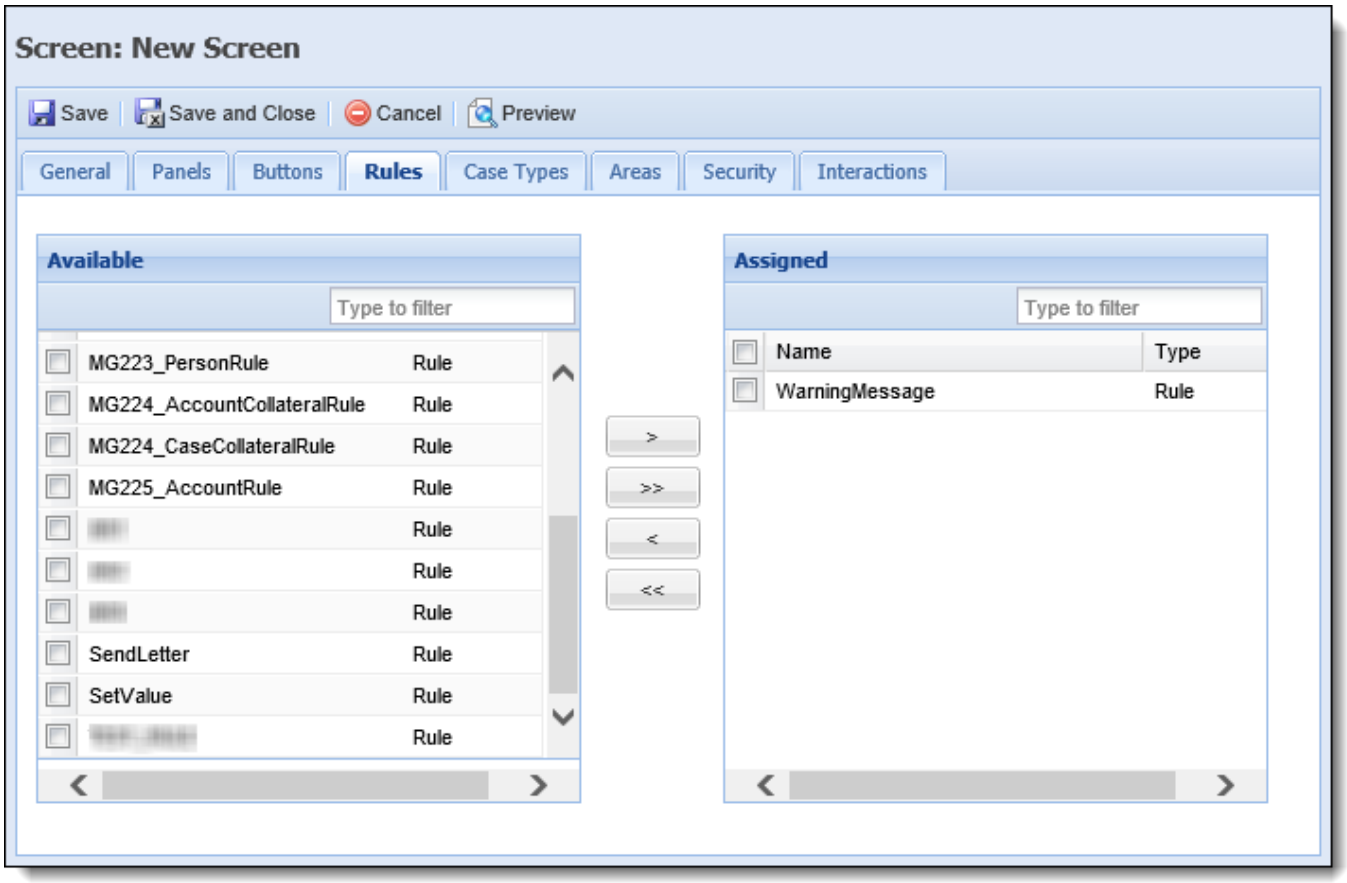
Rules

This tab is only displayed for screens of the following screen types:

- Account
- Account Credit Card Sub Record
- Account Collateral
- Case
- Case Collateral
- Person
- Person Address
- Person Email Address
- Person Phone

Validation Rules can be assigned to a screen to present a message to the user. Upon adding or modifying data within the screen in the workspace and clicking Save, these rules automatically execute to perform the desired action.

Rule attributes enable administrators to select Validation Rules from a list and assign them to the screen.



The following Rule attributes are defined within the Rules tab:

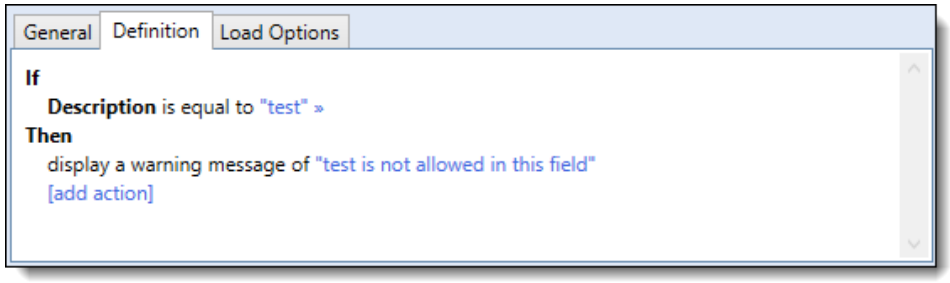
Attribute	Description
Available	Displays a list of all Validation Rules configured in System Management > Collections > Rules Management. To assign a Validation Rule to the screen, select a rule from the list and move it to the Assigned box using the arrows that display.

Assigned	Displays a list of the Validation Rules assigned to the screen. The assigned Validation Rules execute when Save is clicked after data is added or modified within the screen in the workspace.

▶ Rule Configuration

> In order to assign rules to a screen, the ability to author Business Rules must be enabled for the institution. For more information about how to enable this functionality, please contact a Temenos Customer Care Representative.

Validation Rules are configured in System Management > Collections > Rules Management. The following table provides an example of a validation rule that can be configured to execute within a screen:

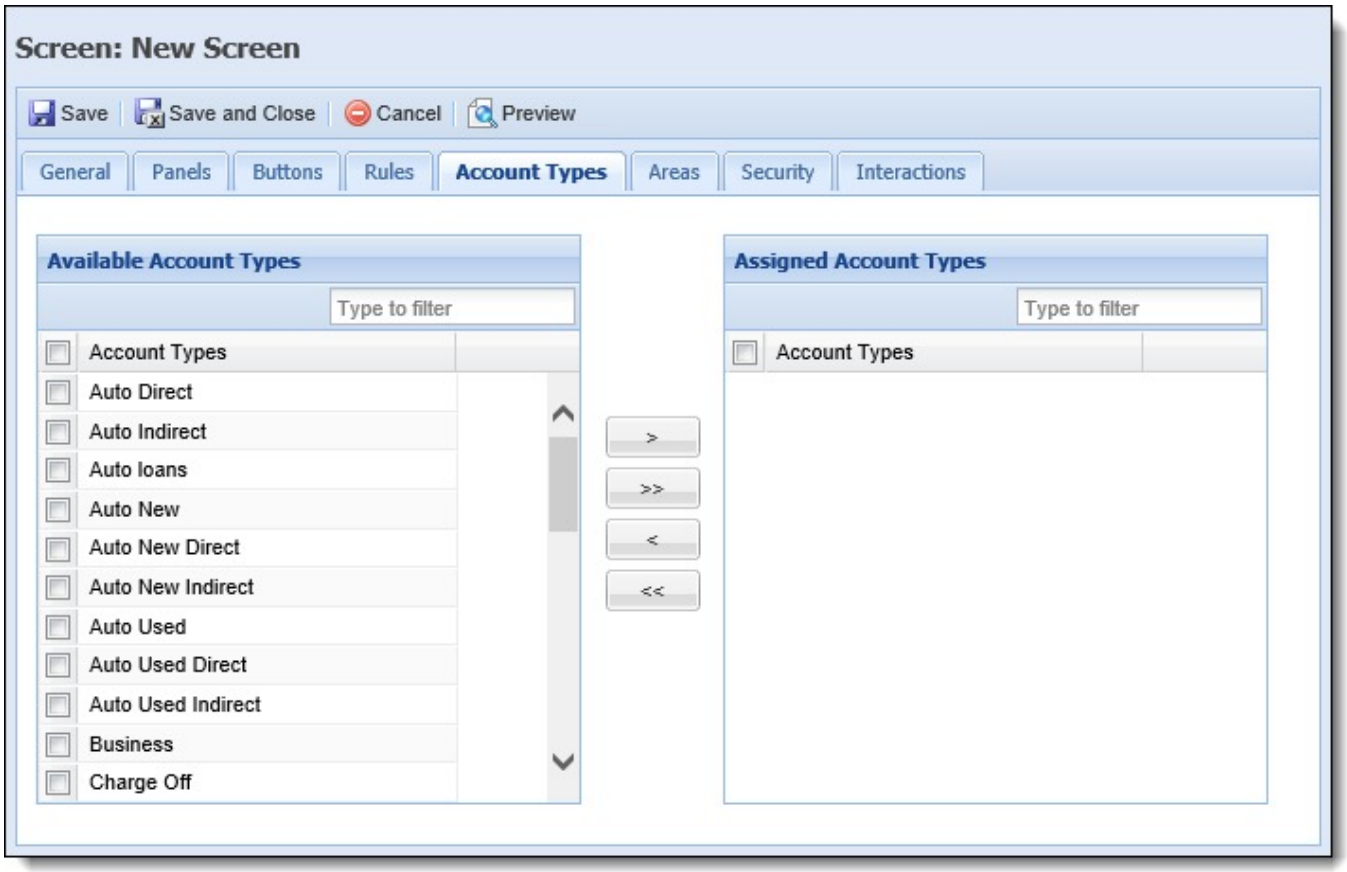
Action Template	What it Does
Display a Warning Message	Displays a warning message to the user. 

For more information on Validation Rules and other Rule Categories, please see the Getting Started with Rules Management topic within this guide.

Account Types

Account Types allow administrators to assign screens to specific account types. The screen is only available if the account in context is an account type that is assigned to the screen.

> For more information about accounts in context, please see the Overview Screen section in the Workspace topic in the user guide.



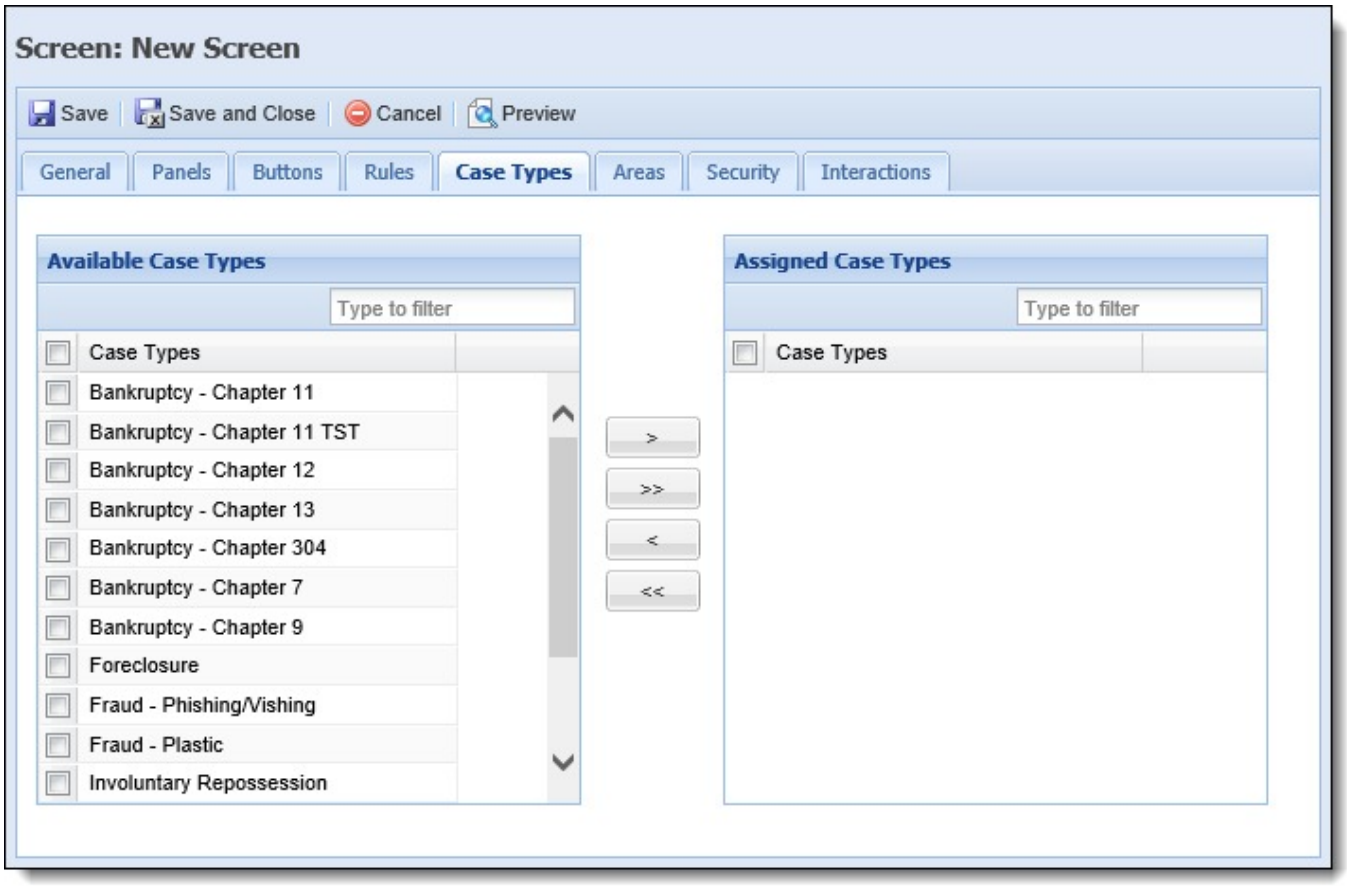
The Account Type attribute is defined on the Account Type tab:

Attribute	Description
Available	Displays a list of all the Account Types configured in System Management > Account Types. Assign access to the panel by selecting the desired account type(s) from the list and moving the account type(s) to the Assigned Account Type list using the arrows that are displayed.
Assigned	Displays a list of all Account Types that have been assigned to the screen.

Case Types

Case types allow administrators to assign screens to be available within specific case types.

> Case types attributes are only available while creating Case screens.

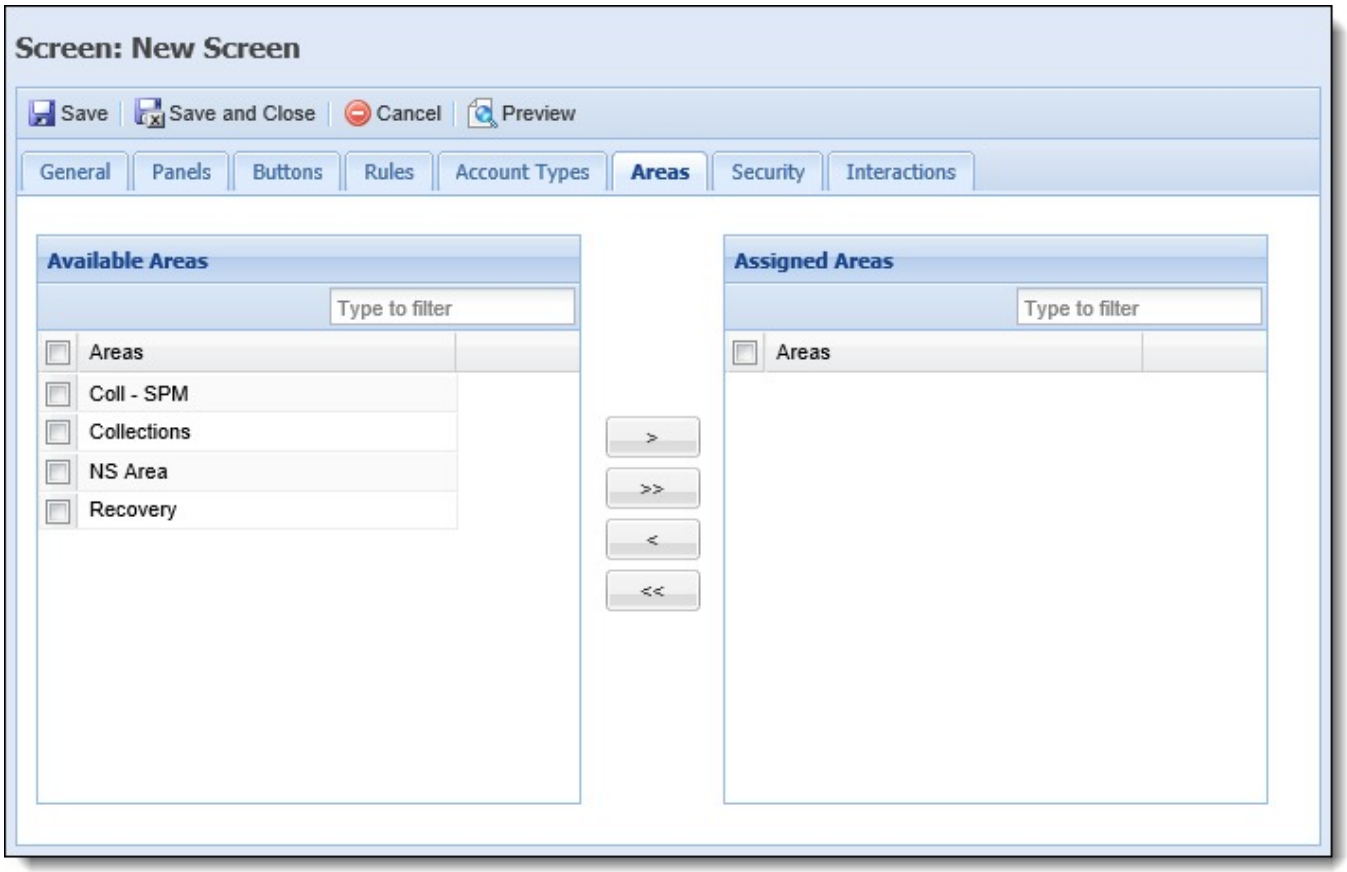


The Case Type attribute is defined on the Case Type tab:

Attribute	Description
Available	Displays a list of all the Case Types configured in System Management > Case Types. Assign access to the panel by selecting the desired case type(s) from the list and moving the case type(s) to the Assigned Case Type list using the arrows that are displayed.
Assigned	Displays a list of all Case Types that have been assigned to the screen.

Areas

The Areas attribute allows administrators to assign the areas in which a screen is available. If the screen is not assigned to an area, users will not be able to utilize the screen while working in that area.

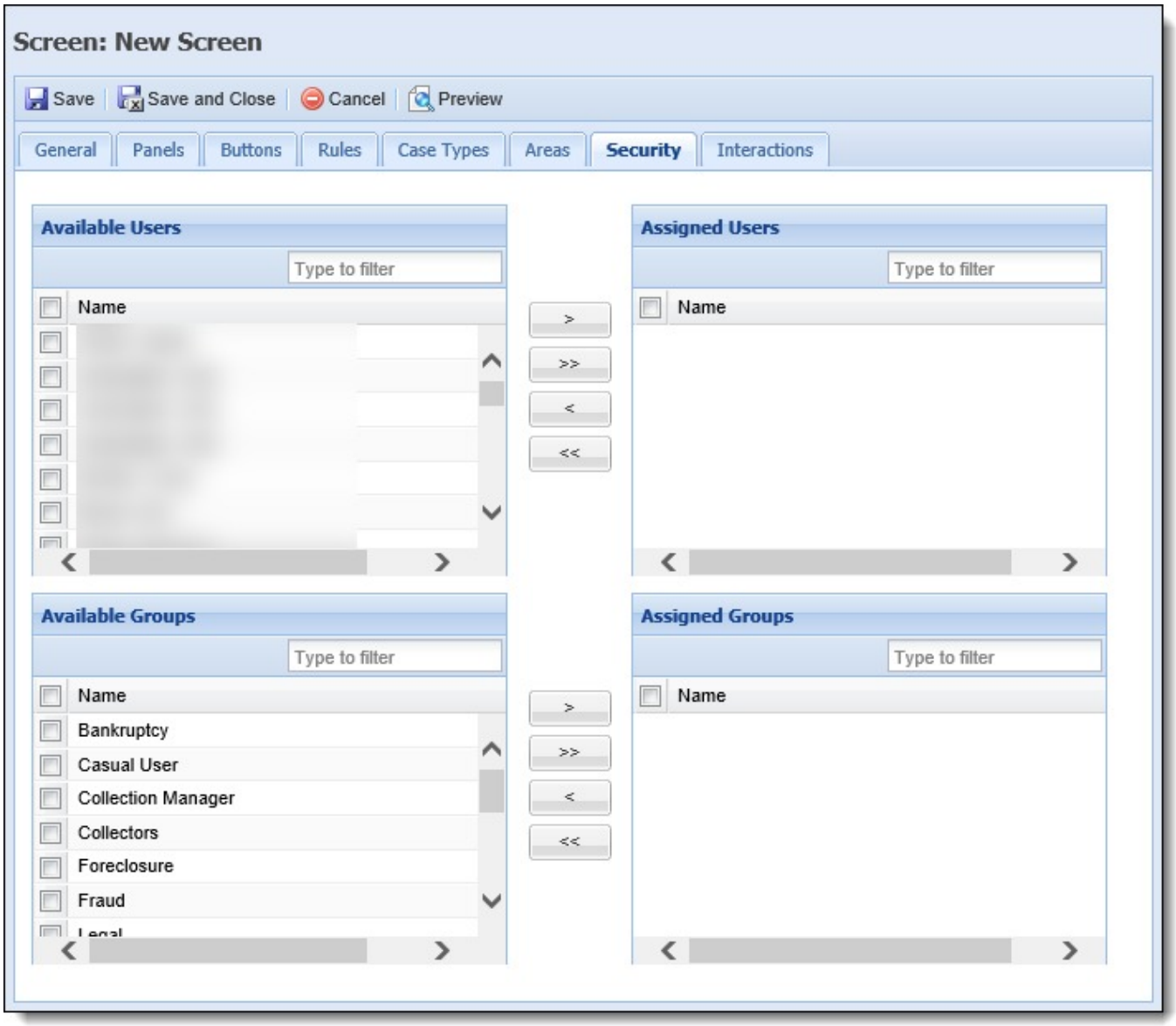


The Area attribute is defined on the Areas tab:

Attribute	Description
Available	Displays a list of all the Areas configured in System Management > Areas. Assign access to the screen by selecting the desired area(s) from the list and moving the area(s) to the Assigned Areas list using the arrows that are displayed.
Assigned	Displays a list of all Areas that have been assigned to the screen.

Security

Security attributes allow administrators to assign the user-defined screen to specific Users and Security Groups.

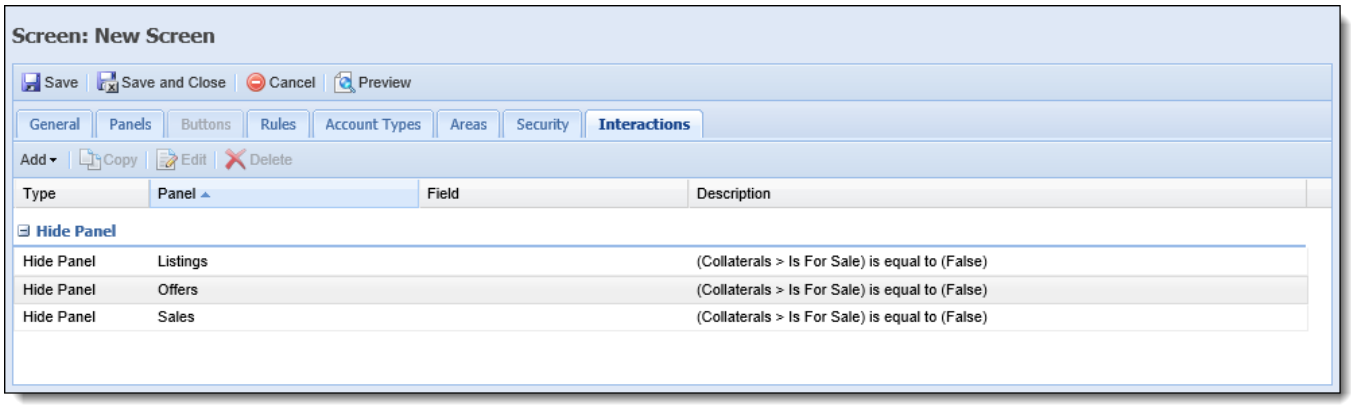


Security attributes are located within the Security Tab:

Attribute	Description
Available	Displays a list of all Users configured in System Management > **Users** and all Security Groups created in System Management > Groups > **Security Groups**. Assign access to the screen by selecting the desired user(s) and group(s) from the list and moving the name(s) to the Assigned Users/Groups boxes using the arrows that display.
Assigned	Displays a list of the Users and Groups assigned access to the screen. Once the screen is saved, it is accessible to the assigned Users and Groups.

Interactions

Interactions provide the ability to configure the conditions in which a screen's fields and panels are hidden from the workspace. This configuration allows institutions to ensure that only relevant fields and panels are displayed in the workspace.



Screen interactions are maintained using the following action buttons:

Button	Description

Add	Allows the administrator to create a new Interaction. Clicking Add displays a drop-down list , which allows the administrator choose from the following Interaction Types:

Interaction Type	Description
Hide Field	Allows the administrator to determine the conditions is which a field is hidden on a panel. Condition Logic Each Hide Field interaction must contain the following components: • A field to be hidden • At least one group of conditions • At least one condition in each group
Hide Panel	Allows the administrator to determine the conditions is which a panel is hidden on a screen. Condition Logic Each Hide Panel interaction must contain the following components: • A panel to be hidden • At least one group of conditions • At least one condition in each group
Hide Row	Allows the administrator to determine the conditions in which a row is hidden within a user-defined grid panel. Condition Logic Each Hide Row interaction must contain the following components: • A panel to be evaluated for hide conditions. • At least one group of conditions • At least one condition in each group Every row within the selected panel is evaluated by the Hide Row conditions. When the condition is True, the row is hidden. When a grid row is edited using an edit screen, the grid is refreshed when the user saves the screen. If an end user changes a value that causes the row to be hidden, the grid refreshes and the row is not visible. Additionally, a user may create a new item that does not display within the grid, because a value that causes the row to be hidden may have been set by the user during its creation. The Related Accounts and Related Tickets panels do not support Hide Row interactions. If a Hide Row interaction exists on an Addresses, Emails, or Phones panel, the interaction takes precedence over the Hide Duplicates filter.

	Field Validation	Allows administrators to determine the conditions in which the value entered in a field is invalid. ▶ Condition Logic Each Field Validation interaction must contain the following components: • A field to be validated • At least one group of conditions • At least one condition in each group A validation message is not required; however, it is recommended as the message provides end users useful information, when the field's value is invalid. Validation occurs in real-time and does not require Save or Save & Next to be clicked.
	Hide Look-up Value	Limit the values displayed to a user in drop-down fields based on the data in other fields on the application or account.
Copy	Allows the administrator to copy an existing Interaction.	
Edit	Allows the administrator to edit an existing Interaction.	
Delete	Allows the administrator to delete an existing Interaction.	

The following attributes are defined within the grid that displays in the Interactions tab:

All interactions for a screen are grouped together by type. Users are able to expand a grouping by clicking ⊞ and collapse a grouping by clicking ⊟.

Attribute	Description
Type	Identifies whether the interaction Type is Hide Field, Hide Panel, Hide Row, or Field Validation.
Panel	The value within the Panel attribute is determined by the interaction Type: • For Hide Field interactions, the Panel attribute indicates the name of the panel that contains the field to be hidden. • For Hide Panel interactions, the Panel attribute indicates the panel to be hidden. • For Hide Row interactions, the Panel attribute indicates the name of the panel to be evaluated for hide conditions. • For Validate Field interactions, the Panel attribute indicates the panel where the field being validated is located.
Field	The value within the Field attribute is determined by the interaction Type: • For Hide Field interactions, the Field attribute indicates the field to be hidden. • For Hide Panel interactions, the Field attribute is blank. • For Hide Row interactions, the Field attribute is blank. • For Validate Field interactions, the Field attribute indicates the field being validated.

Description	Indicates the Interaction condition(s).

To access the condition and expression builder, click Add, Copy, or Edit. Within the condition and expression builder, administrators are able to identify the field or panel to be hidden as well as the condition(s) that must be met for the interaction to occur.

Upon clicking Add, administrators are prompted to:

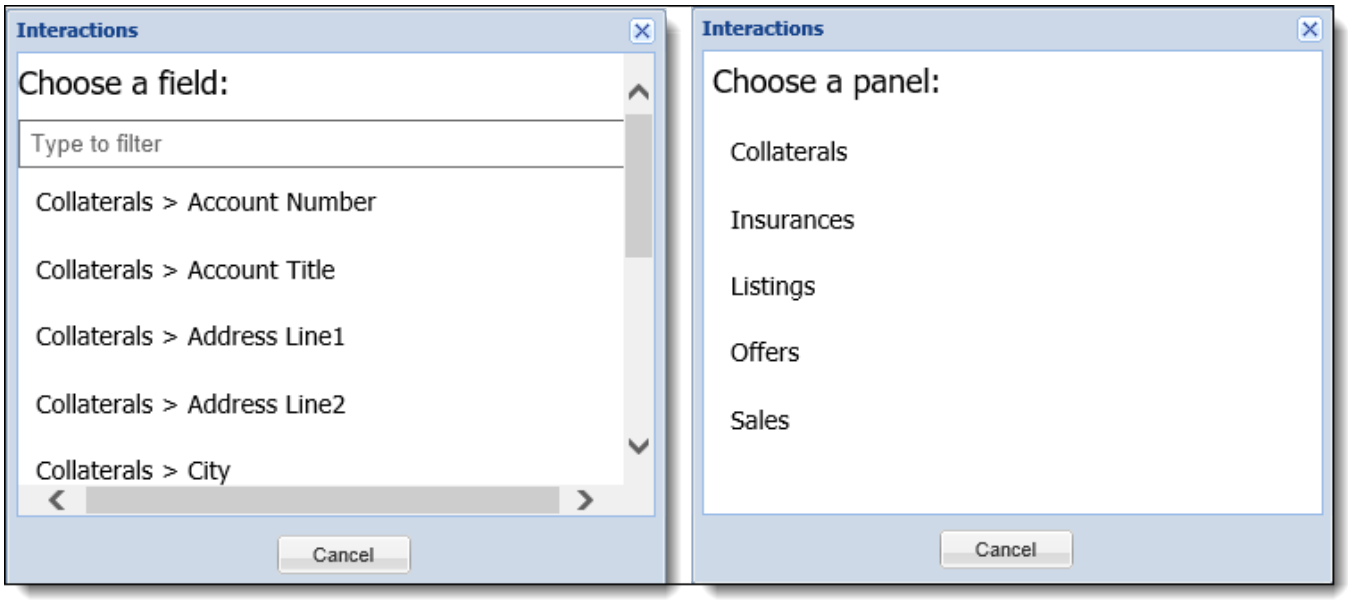
- Choose the field or panel to be hidden, if the interaction's conditions are met.
- Choose the panel that should have rows hidden, if the interaction's conditions are met.

> If there are no user-defined grid panels assigned to the screen, the Choose a Panel window appears blank.

- Choose the field to be validated, by the interaction's conditions.

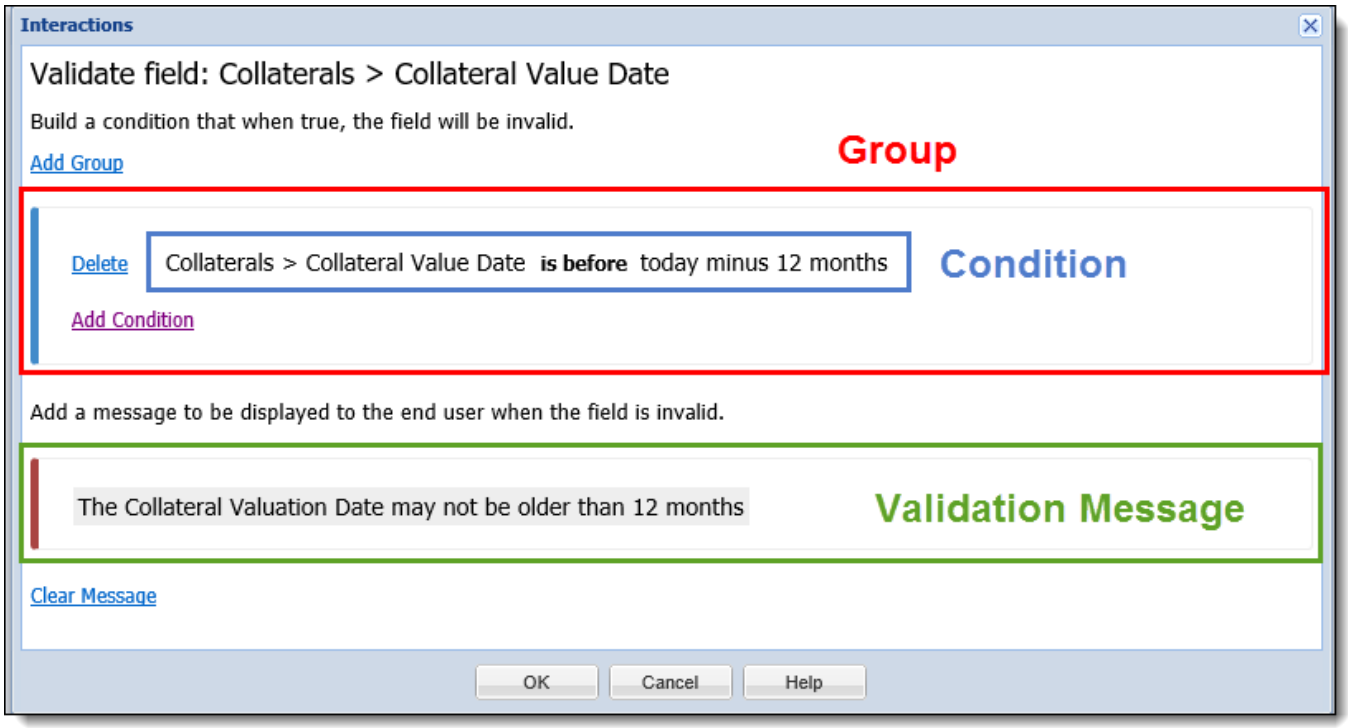
Click on the desired field/panel/row to advance to the condition and expression builder.

> If editing an existing interaction, administrators bypass the field/panel selection and are taken directly to the condition and expression builder.



> The fields that populate in the Choose a Field window are limited to the fields that appear within user-defined panels, which are assigned to the screen.
> The panels that populate in the Choose a Panel window are limited to the panels assigned to the screen.

In the condition and expression builder, administrators may define one or more groups that may contain multiple conditions. If an interaction contains multiple groups, each group may be linked with an AND/OR relationship. Click Add Group to begin authoring the hide condition(s). Once clicked, a new group is added to the Interactions pop-up window.



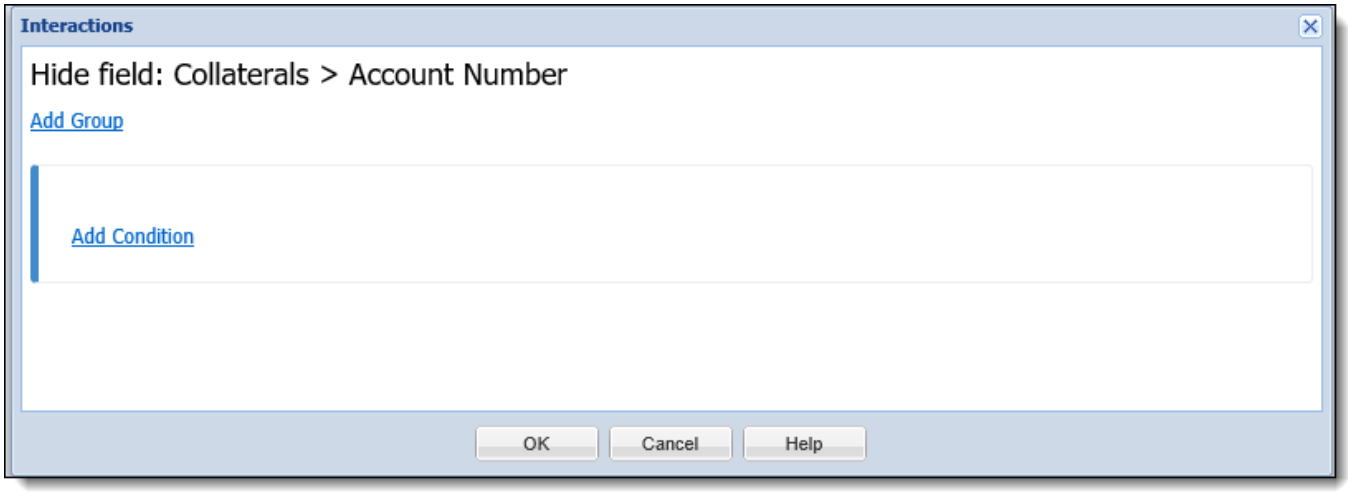
Groups

A group is a group of conditions, and at least one group must be defined for an interaction. Each group contains one or more condition, and administrators can define one or more groups that may contain multiple conditions. If an interaction contains multiple groups, each group may be linked with an AND/OR relationship.

> A screen interaction may contain an unlimited number of groups, and each group may contain an unlimited number of conditions.

Click Add Group to begin authoring the hide condition(s). Once clicked, a new group is added to the Interactions pop-up window.

> When creating a new interaction, one group is automatically added.



Within each group, administrators are able to perform the following actions:

Action	Description
Add Condition	Allows administrators to add an interaction condition to the group. Upon clicking this button, a new condition is added to the group. When a new condition is added, the first field available in the screen populates in the left expression. Click on the left expression to open the field and function menu. If a group contains multiple conditions, each condition may be linked with an AND/OR relationship. By default, the relationship is set to an AND relationship. Click on the AND to change it to OR.
Delete	Allows administrators to delete a condition from the group. Upon clicking this button, the condition is removed from the group.

Conditions

Each condition is comprised of two expressions (a left and a right) that are linked by a relationship operator.

Expressions

An expression is a calculation that returns a single value. Each expression can be comprised of one or more tokens, which may include a mixture of manually entered data, operators, fields, and functions. The following example contains seven tokens:

```
1  +  Collaterals > Collateral Type  +  5  +  the left 4 characters of Collaterals > Account Number
```

- Two manually pieces entered data (1, 5)
- Three operators (plus signs)
- One field (collateral type)
- One function (the left 4 characters of Account Number)

When building an expression, the following navigation capabilities are available:

- Click within an expression to select a token.

  > The arrow keys cannot be used to navigate through the field/function menu.

- Click on a field or function with the mouse to bring up the menu.
  - Clicking on a field opens the field and function menu.
  - Clicking on a function opens the function configuration window.
- Clicking the tab or right-arrow key to focus the next token.
- Clicking the shift-tab or left-arrow key to focus the previous token.
- Clicking the home key to highlight the first token.
- Clicking the end key to highlight the last token.
- Clicking an operator key to automatically enter the value and advance to the next token.
- Clicking the equal sign to bring up the field or function menu.
- Clicking the backspace/delete key to clear the field, function, or operator from the current token or remove the last character that was manually entered.
- Clicking the backspace/delete key on an empty token to remove the token and highlight the previous token.

Additionally, the following keys are supported for data entry:

Keys	Description

Letters	All upper and lowercase letters from A to Z
Numbers	All numbers 0-9
Space	The space bar
(	Begin grouping
)	End grouping
+	Add
-	Subtract
*	Multiply
/	Divide
\	Forward slash
.	Period or decimal
=	Equal sign
!	Exclamation
@	At symbol
#	Number sign, pound sign, hashtag
$	Dollar sign
%	Percent
^	caret
&	And symbol, ampersand
,	Comma
<	Less than
>	Greater than
?	Question mark

Expressions are validated as they are authored. Invalid tokens are highlighted in red, and the errors are indicated in a tooltip when the cursor hovers over the exception.

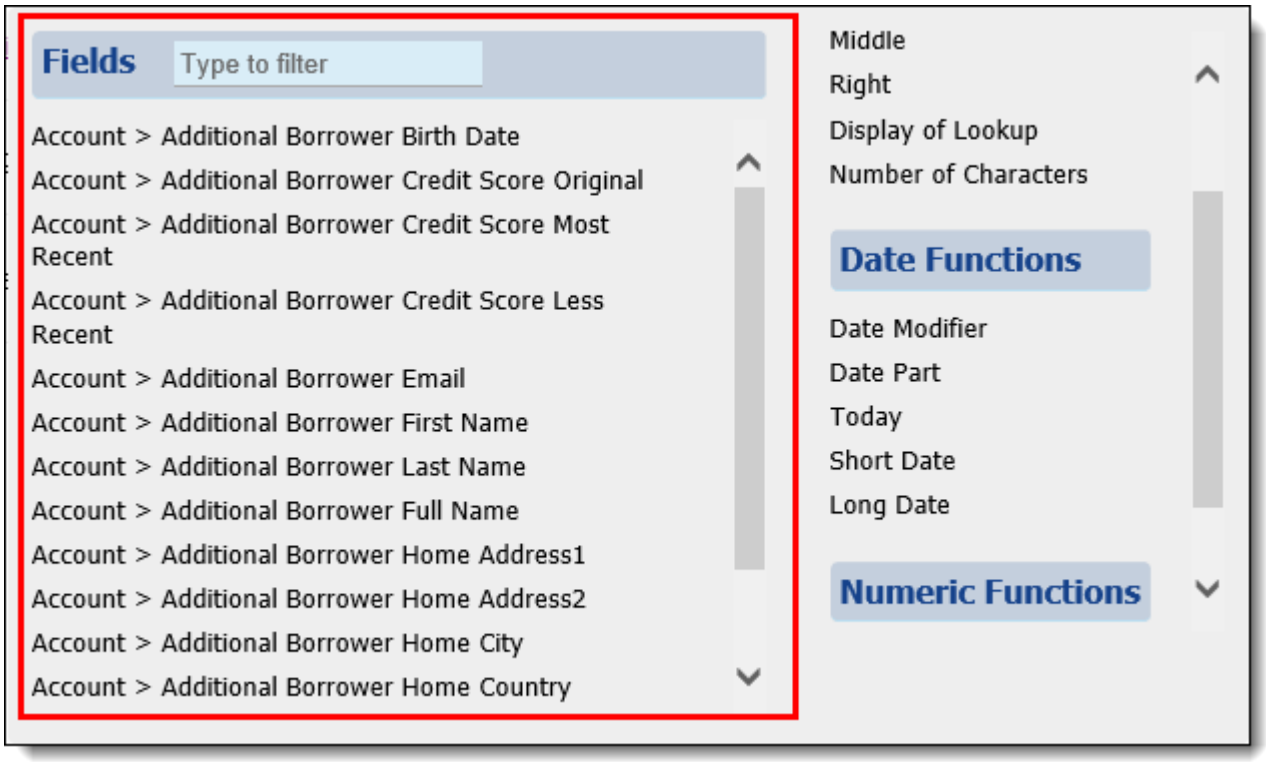
List of Validation Error Messages

- The first token must be text, field, function or open parenthesis.
- The last token must be text, field, function or close parenthesis.
- The number of open parentheses must match the number of close parentheses.
- Text must be followed by operator, close parenthesis.
- Field must followed by operator, close parenthesis.
- Function must be followed by operator, close parenthesis.
- Operator must be followed by text, field, function, open parenthesis.
- Open Parenthesis must be followed by text, field, function, open parenthesis.
- Close Parenthesis must be followed by operator, close parenthesis.

Fields

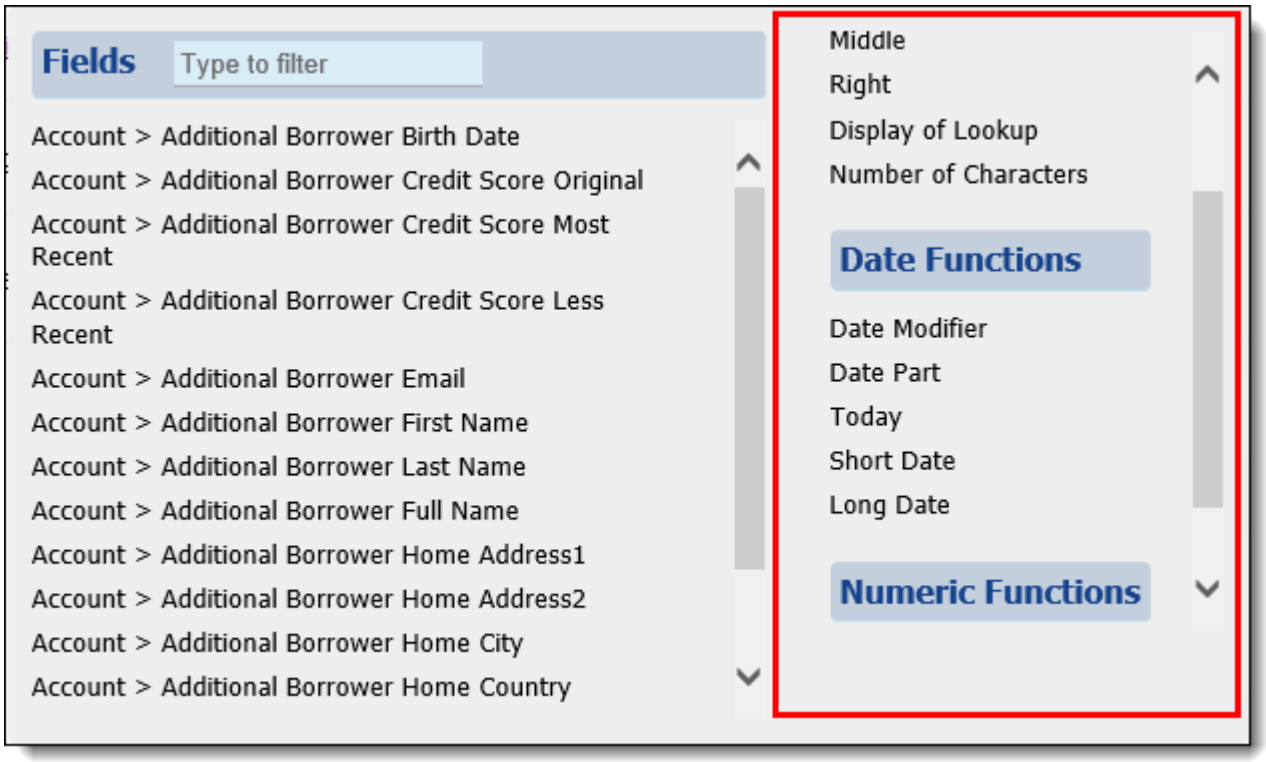
When authoring an expression, administrators may select a field from the left side of the Field and Function menu. The fields available within this list are limited to those that are assigned to the screen.

> The Field and Function menu is accessed by pressing the equal sign (=) on the keyboard within a blank token, or clicking on an existing field or function in a token.



Functions

A Function is a token that uses one or more inputs to produce a single value. The following functions appear on the right side of the Field and Function menu:

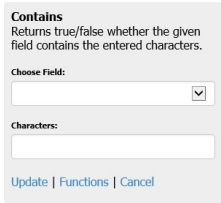
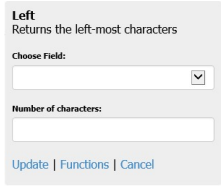
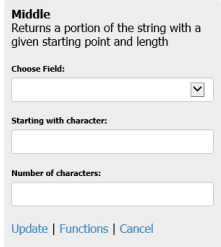
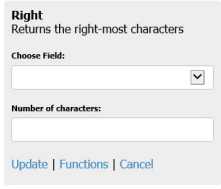


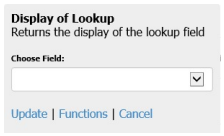
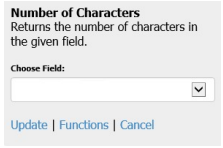
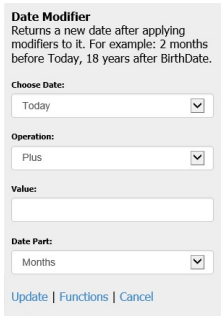
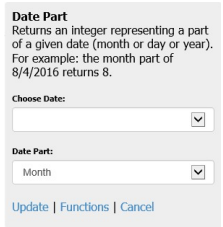
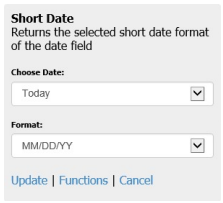
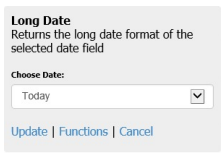
Upon selecting a function, the corresponding pop-up window opens. Within the function pop-up window, administrators are able to set the inputs to the desired values.

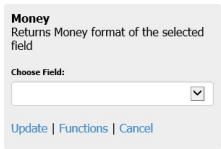
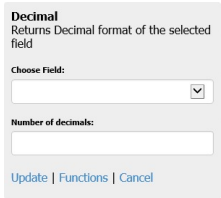
> The Today function does not require additional inputs to be configured; therefore, a pop-up window does not open.

Review the following table for an overview of the functions available within the condition and expression builder:

Function Name	Description	Function Logic and Inputs	Function
String			

Contains	Returns true or false, given whether the field contains the entered characters. To return true, the entered characters must exist in the field exactly as typed (case sensitivity is ignored).	Contains (b) within (a) a. Field b. Characters	 When the Contains function window displays, the Choose Field drop-down defaults to the first field in the list, and does not automatically populate with the field for the condition. The field for the condition must be selected from the drop-down list.
Left	Returns the left-most characters.	The left (b) characters of (a) a. Field b. Number of characters	
Middle	Returns a portion of the string with a given starting point and length.	The middle (c) characters of (a), starting with. a. Field b. Start c. Length	
Right	Returns the right-most characters.	The right (b) characters of (a) a. Field b. Number of characters	

Display of Lookup	Returns the display of the lookup field.	Choose the lookup field.	
Number of Characters	Returns the number of characters in the given field.	The number of characters in (a). a. Field	
Date			
Today	Returns today's date.	Today The Today function does not require any inputs to be configured; therefore, a pop-up window does not open.	
Date Modifier	Returns a new date after applying modifiers to the original date. For example: Today minus 2 months, or BirthDate plus 18 years.	(a)(b)(c)(d) a. Field or Today b. + or - c. Value d. Month, Day, Year	
Date Part	Returns an integer representing a part of a given date (month, day, or year). For example: The month of 4/1/77 is 4.	The (b) of (a) a. Field/Today b. Month, Day, Year	
Short Date	Returns the selected short date format of the date field.	Choose the date field. Choose the format: • MM/DD/YY • YY/MM/DD • MM/DD/YYYY • YYYY/MM/DD	
Long Date	Returns the long date format of the selected date field.	Choose the date field.	
Numeric			

Money	Returns the money format of the selected field.	Choose the field.	
Decimal	Returns the decimal format of the selected field.	Choose the field. Enter the number of decimal places.	

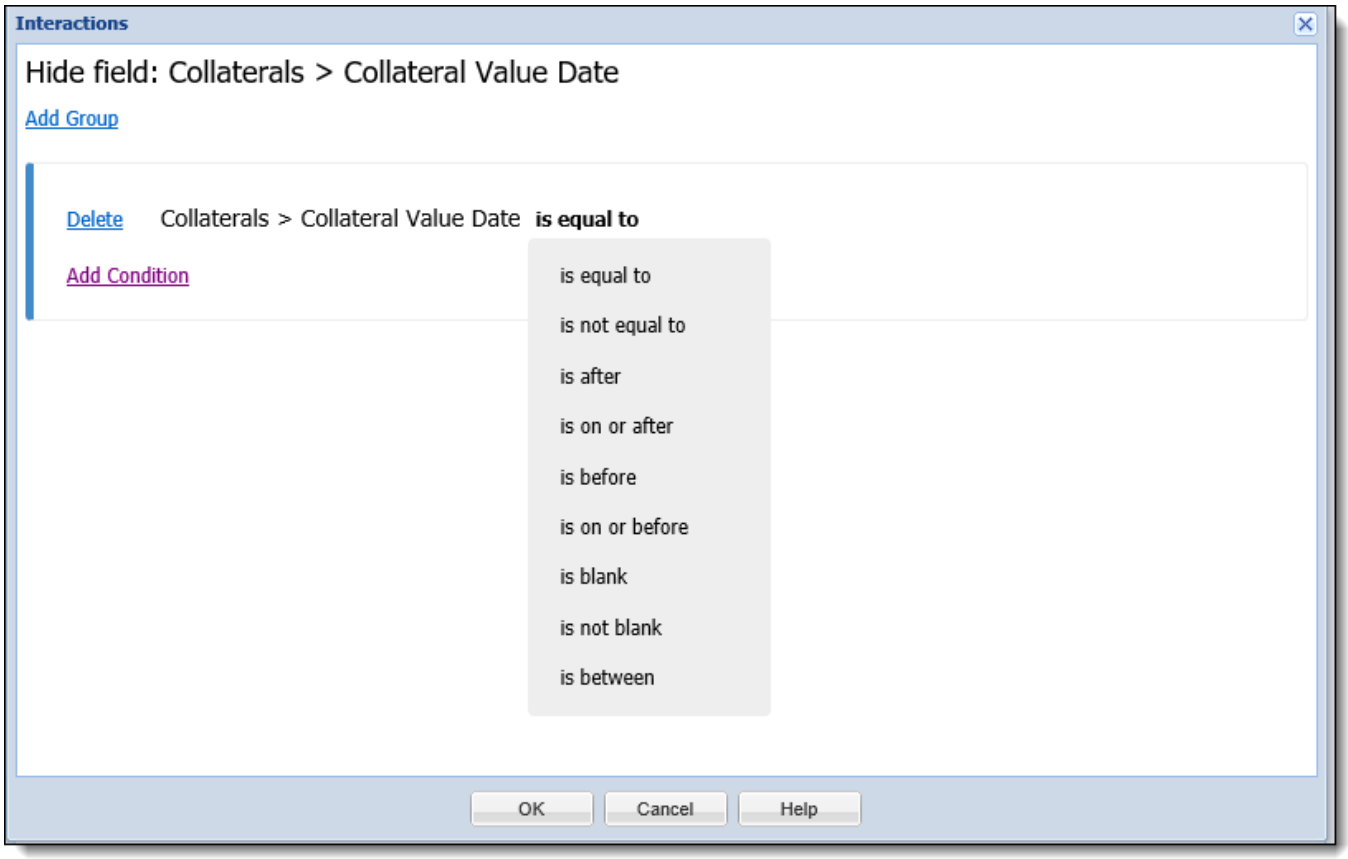
> When a calculated field requires formatting, an empty field must be created to hold the calculated value, and the formatting needs to be applied to the empty field.

In addition to setting the inputs, administrators are able to perform the following actions:

Action	Description
Update	Saves the selections made in the function's pop-up window, and returns the administrator to the condition and expression builder.
Functions	Closes the function's pop-up window, discards all selections, and returns the administrator to the field and function menu.
Cancel	Closes the function's pop-up window, discards all selections, and returns the administrator to the condition and expression builder.

Relationship operators

The relationship operators available in a condition are based on the left expression's data type. For example, in the following image, the left expression is a date field and operators available are limited accordingly.



Refer to the following matrix for an overview of the relationship operators available with each data type:

Operator	Data Type				
	Booleans	Dates	Strings	Lookups	Numerics
Is equal to	✓	✓	✓	✓	✓
Is not equal to		✓	✓	✓	✓
Is greater than			✓		✓
Is greater than or equal to			✓		✓
Is after		✓			
Is on or after		✓			
Is less than			✓		✓
Is less than or equal to			✓		✓
Is before		✓			
Is on or before		✓			
Is blank		✓	✓	✓	✓

Is not blank		✓	✓	✓	✓
Is between		✓			✓

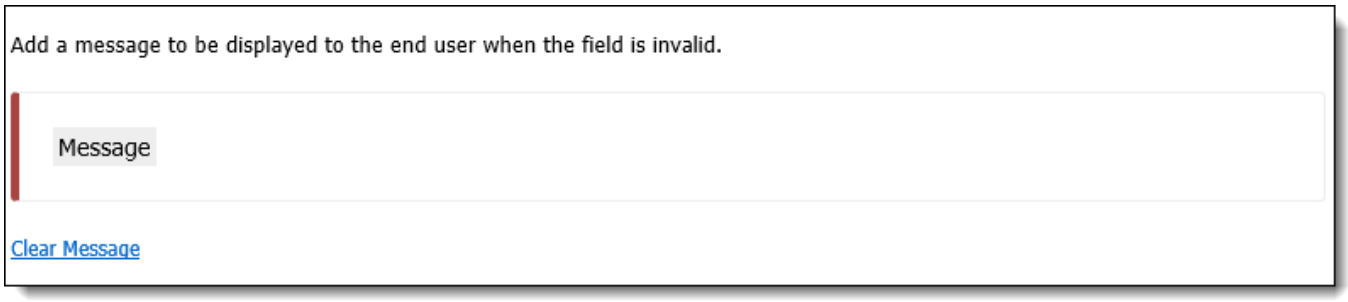
Reference the following list for an overview of information to consider for specific interactions and/or functions:

- When authoring conditions that use a lookup field, administrators are able to select multiple options within the pop-up window. Click each value to be included in the condition. Once selected, a check mark appears next to the item
- Hidden panels consume no space within a screen. If a screen is configured as one column, and contains a Hide Panel Interaction, panels shift up to consume the space of the hidden panel. If a screen is configured to include multiple columns, and contains a Hide Panel Interaction, panels shift to the left to occupy the space of the hidden panels; however, the panels that appear in subsequent rows do not wrap up to occupy the space, thus causing blank spaces in a screen.
- Hidden fields consume no space within a panel. If a one-column panel is configured on a screen containing a Hide Field Interaction, fields shift up to consume the space of the hidden field. If a multiple-column panel is configured on a screen containing a Hide Field Interaction, fields shift to the left to occupy the space of the hidden fields; however, the fields that appear in subsequent rows do not wrap up to occupy the space, thus causing blank spaces in a panel.
- When creating a Calculate Field interaction, the condition identifies when the field should be calculated. If the condition is true, the field is calculated. If the field should always be calculated, do not include a condition.
- If the Is Equal To or Is Not Equal To operators are used in a condition that includes a Number of Characters string function, the system automatically evaluates the defined value as a number.
- Though the Is Blank and Is Not Blank operators are available for a Number of Characters string function, the operators are not applicable when using the Number of Characters function to evaluate a text field. If a text field is NULL, the count of characters returns as "0," rather than NULL.

Validation Message

A Validation Message is a message that displays to the end user, if the value entered in the field does not meet the conditions identified in the Validate Field interaction.

The Validation Message section within the condition and expression builder only displays for Validate Field interaction types.



Click the mouse within the message text box or press the Tab button to select the Message text box.

Click Clear Message to remove the clear the validation message currently entered within the text box.

For more information on creating Interactions, please see the How to Create Screen Interactions topic.

Creating a Screen

The Create function enables administrators to define the structure of a user-defined screen. This function provides the ability to configure and customize all screen and panel attributes to meet an institution's needs.

To design a user-defined screen, navigate to System Management > Screens and click Create.

A Select Screen Type window appears.

The Screen types available within the selection window are both Main Screens and Edit Screens.

Main Screens

Main Screens are screens used to collect account, case, and person information within a variety of user-defined panels.

The following screen types are classified as main screens:

Screen	Description	Available Panels
Account	Screen type used to view and capture Account, Collateral, and Credit Card Sub Record information.	• Account • Collaterals • Credit Card Sub Records • Report • Rich Text

Case	Screen type used to view and capture case information such as bankruptcies, collaterals, foreclosures, legal matters, and repossessions.	• Bankruptcy Assets • Bankruptcy Claims • Bankruptcy Hearings • Bankruptcy Liabilities • Bankruptcy Parties • Bankruptcy Payments • Bankruptcy Reaffirmations • Case • Foreclosure Notices • Foreclosure Publications • Foreclosure Trustee Sale Guarantees • Legal Filings • Legal Hearings • Legal Parties • Legal Summons • Parties • Primary • Related Accounts • Related Cases • Related Collaterals • Related Persons • REO Invoices • REO Rental Terms • Report • Repossession Assignments • Repossession Conditions • Repossession Locations • Repossession Notices • Repossession Repairs

		• Rich Text • Service Request
Person	Screen type used to view and capture person information such as addresses, employers, payrolls, phone numbers, and promises. The Person screen type is typically used as an Overview screen in the Workspace.	• Account • Addresses • Case • Email Addresses • Employers • Financial Statements • Messages • Notepad • Payrolls • Person • Phone Classification History • Phones • Promise History • Related Accounts • Related Cases • Related Loan Applications • Related Persons • Report • W2s

Custom Workflow fields can be added to any Person, Account, or Case screen. However, if the screen to which these fields are assigned is accessed outside of a workflow, the custom workflow fields are dimmed and unavailable.

If address, phone and email panels are included in an Overview screen or top area of the workspace, information in these panels cannot be edited as they are read-only.

Edit Screens

Edit Screens are used to collect information for grid panels. When adding or editing information in a grid panel, an edit screen is used. Unlike main screens, edit screens are tied to panels and can only be accessed via the associated panels.

For information about the panels associated with Edit Screens, refer to the Panels Type section within this topic.

The following screen types are classified as Edit screens:

Screen	Description	Available Panels

Account Collateral	Screen type used to capture Account Collateral information, such as insurance, liens, taxes, and valuations.	• Collaterals • Insurances • Liens • Listings • Offers • Sales • Taxes • Valuations
Account Collateral Insurance	Screen type used to capture insurance information for account collateral.	Insurances
Account Collateral Insurance Claim	Screen type used to capture collateral insurance claim information.	Claims
Account Collateral Lien	Screen type used to capture lien information for account collateral.	Liens
Account Collateral Listing	Screen type used to capture listing information for account collateral.	Listings
Account Collateral Offer	Screen type used to capture offer information for account collateral.	Offers
Account Collateral Sale	Screen type used to capture sale information for account collateral.	Sales
Account Collateral Tax	Screen type used to capture tax information for account collateral.	Taxes
Account Collateral Valuation	Screen type used to capture valuation information for account collateral.	Valuations
Account Credit Card Sub Record	Screen typed used to capture Credit Card Sub Record information.	Credit Card Sub Record
Case Bankruptcy Assets	Screen type used to capture asset information for bankruptcy cases.	Assets
Case Bankruptcy Claims	Screen type used to capture claim information for bankruptcy cases.	Claims
Case Bankruptcy Hearings	Screen type used to capture hearing information for bankruptcy cases.	Hearings
Case Bankruptcy Liabilities	Screen type used to capture liability information for bankruptcy cases.	Liabilities
Case Bankruptcy Parties	Screen type used to capture information regarding the parties for bankruptcy cases.	Parties
Case Bankruptcy Payments	Screen type used to capture payments information for bankruptcy cases.	Payments
Case Bankruptcy Reaffirmations	Screen type used to capture bankruptcy case reaffirmations.	Reaffirmations

Case Collateral	Screen type used to capture Case Collateral information, such as insurance, liens, taxes, and valuations.	• Collaterals • Insurances • Liens • Listings • Offers • Sales • Taxes • Valuations
Case Collateral Insurance	Screen type used to capture insurance information for case collateral.	Insurances
Case Collateral Insurance Claim	Screen type used to capture insurance claim information for case collateral.	Claims
Case Collateral Lien	Screen type used to capture lien information for case collateral.	Liens
Case Collateral Listing	Screen type used to capture listing information for case collateral.	Listings
Case Collateral Offer	Screen type used to capture offer information for case collateral.	Offers
Case Collateral Sale	Screen type used to capture sale information for case collateral.	Sales
Case Collateral Tax	Screen type used to capture tax information for case collateral.	Taxes
Case Collateral Valuation	Screen type used to capture valuation information for case collateral.	Valuations
Case Foreclosure Notice	Screen type used to capture case foreclosure notices.	Notices
Case Foreclosure Publication	Screen type used to capture foreclosure publication information for cases.	Publications
Case Foreclosure Trustee Sale Guarantee	Screen type used to capture Trustee Sale Guarantee information for cases.	Trustee Sale Guarantees
Case Legal Filing	Screen type used to capture legal filing information for cases.	Filings
Case Legal Hearing	Screen type used to capture legal hearing information for cases.	Hearings
Case Legal Party	Screen type used to capture information regarding the legal parties involved in cases.	Parties
Case Legal Summon	Screen type used to capture legal summons information for cases.	Summons
Case Party	Screen type used to capture information regarding the parties involved in cases.	Party

Case REO Invoices	Screen type used to capture real estate owned invoice information for cases.	Invoices
Case REO Rental Income	Screen type used to capture real estate owned rental income information for cases.	Rental Incomes
Case REO Rental Terms	Screen type used to capture real estate owned rental term information for cases.	Rental Terms
Case Repossession Assignments	Screen type used to capture repossession assignment information for cases.	Assignments
Case Repossession Conditions	Screen type used to capture repossession condition information for cases.	Conditions
Case Repossession Locations	Screen type used to capture repossession location information for cases.	Locations
Case Repossession Notices	Screen type used to capture repossession notice information for cases.	Notices
Case Repossession Repairs	Screen type used to capture repossession repair information for cases.	Repairs
Case Service Request	Screen type used to capture service request information for cases.	Service Requests
Person Address	Screen type used to capture address information for persons.	• Person Address • Rich Text
Person Email Address	Screen type used to email address information for persons.	Person Email Address
Person Employer	Screen type used to capture employer information for persons.	Person Employer
Person Financial Statement	Screen type used to capture financial statement information for persons.	Person Financial Statement
Person Payroll	Screen type used to capture payroll information for persons.	Person Payroll
Person Phone	Screen type used to capture phone information for persons.	• Person Phone • Rich Text
Person W2	Screen type used to capture W2 information for persons.	Person W2

Once a screen type is selected, the Edit Screen window appears for administrators to define the attributes of the screen.

Within the Edit screen window, define the General attributes.

Once all General attributes are defined, navigate to the Panels tab to perform one of the following actions:

- Add a Panel

To add panels to a screen, select the Panels tab and click . Clicking opens the Select Panel window.

Select the desired Panel Type to be assigned to the screen and click **OK**.

> The panel types that display within the Select Panel window depend on the screen type selected. The example above displays the panels available to be added to a Person Screen. For more information on panel types and screen types that support them, please see the list of available Panel Types.

After selecting a panel type, an Edit Panel window opens to configure panel attributes.

Define the General attributes for the panel, and then navigate through the tabs to configure the additional attributes.

Depending on the panel type, the following actions may be available:

- Add and Remove Fields
- Manage Edit Screens
- Add and Remove Columns
- Determine Panel Properties
- Assign Report Parameters

Add and Remove Fields

Within the Fields tab, perform one of the following actions to determine the fields that are available within the panel:

- Add Fields
- Delete Fields

Add Fields

To begin adding fields to the panel:

- Click Add Field. The Field Selector window appears.
- Navigate through the folders to locate the desired field, or enter the name of the field in the search box at the top of the Field Selector window. Assign a field to the panel by double-clicking a field or by selecting a field and clicking Add Field.

	Note Box	

> Custom fields can only be added to user-defined screens.

> Workflow fields added to a panel only display when the screen is used as a workflow step.

- Once all fields have been added, click Close to return to the Fields tab.
- The fields populate in the grid on the fields tab.

> Specific fields may only be added to a screen or panel once. The exception to this rule is the Add Spacer/Text/Line fields.

- The order in which the fields are displayed on the Fields tab (from top to bottom) is the order in which the fields appear in the panel. The order can be changed by clicking a field and dragging it to the position in the list that is desired to display on the panel.

- By clicking Add Spacer, Add Text, and/or Add Line, these fields can be added to the panel.
- Within the grid columns, define the additional attributes, such as Field Label, Required, Recommended, Read-Only, Col. Span, and Text Line. If desired, click to define label and value style attributes.

> If a screen is configured to collect identical information in two locations, such as when two different panels contain the same field, the field information within one panel will be overwritten when data entered within the other panel is updated and the screen is saved.

Delete Fields

Once fields have been added to a panel, administrators are able to remove them by selecting the field in the Fields tab and clicking Delete.

> When deleting a field, the system checks whether the field is included in a Validate Field interaction condition. If the field is included in a Validate Field interaction condition, a warning message displays that asks whether the field as well as all interactions using it should be deleted. Click Yes to delete the field as well as the interactions related to the field. Click No to keep the field as well as the interactions.

Manage Edit Screens

If the panel is a grid, an edit screen is required. Navigate to the Edit Screens tab and define the Edit Screen attributes. To add an Edit Screen to the panel, click within the Screen column and select the desired screen. The screen name populates within the Screen column.

Add and Remove Columns

Within the Columns tab, perform one of the following actions to determine the columns that are available within a grid panel:

- Add Columns
- Delete Columns

Add Columns

To add columns to the panel:

- Click Add within the Columns tab.
- A Select Columns screen appears. Select the fields that are to be added to the column by selecting the field and clicking Add Field, or double-clicking on the field.
- Once all fields and columns have been selected, click Close. After closing, administrators are taken back to the Columns tab. This tab populates the selected columns and fields.
- The order in which the columns appear in the grid determines their order of appearance in the panel. Click a column and drag it to the desired location in the sequence.
- Define Column Header, Width, and Value Style attributes within the grid columns.

Delete Columns

- Once columns have been added to a panel, administrators can remove them by highlighting a column and clicking Delete.

- Upon completion of all panel attributes within the Edit Panel window, click Save and Close in the screen configuration window to return to the Panels tab.
- After returning to the Panels tab, administrators are able to define additional panels to be added to the screen or define other screen attributes to finish completing the screen.
- When the Buttons tab is enabled, navigate to the Buttons tab to define button attributes and add or delete buttons.

Determine Panel Properties

If the Properties tab is available:

- Select the desired properties within the Available list, and move them to the Assigned list using the arrows that appear.

Assign Report Parameters

To assign a default value for a parameter

- Select the parameter in the grid and click Assign Parameter Field. The Field Selector is displayed.
- Search for a specific field by entering text into the search box or navigate through the field tree to locate the field to use as the parameter default.
- Double-click the field or select the field and click Add Field to add it to the Report Parameters tab.
- If columns can be configured to appear in the panel, navigate to the Columns tab to define column attributes and add or delete columns.

Edit Panels

After a panel has been created, administrators are able to revisit the screen and edit the panels of previously created user-defined screen.

- To begin editing a panel, select the desired panel within the grid on the Panels tab and click Edit.
- Make the desired modifications to the panel attributes and click Save and Close to save the modifications and return to the Panels tab.

> Panel modifications are not saved until the screen in which the panel exists is saved.

Delete Panels

Administrators are able to delete panels from existing or in-progress user-defined screens.

- To delete a panel, select the panel within the grid on the Panels tab and click Delete.
- When finished, click **Save and Close** to finalize the screen modifications.

> When deleting panels, a confirmation message is not displayed. When delete is selected, the panel is deleted.

Upon completion of all panel attributes, if the Buttons tab is enabled, select the tab to add and a manage the buttons that appear on the screen.

Add a Button

When the Buttons tab is enabled, use this tab to manage screen buttons and their attributes.

- To add a button to a screen navigate to the Buttons tab and click Add. A Select Button window appears.
- Select the desired button and click Add.
- Once all buttons have been added, click Done.
- Define the attributes of the Button in the Buttons tab grid.

Delete Buttons

Once a button has been added to a screen, administrators are able to remove them by selecting the button and clicking Delete.

If desired, navigate to the Rules tab to assign rules to execute when the screen loads in the workspace.

After all rules have been assigned, select the Account Types and/or Case Types tabs to enable the availability of the screen for the applicable accounts and/or cases in the workspace.

Navigate to the Areas tab to assign the screen to specific workspace areas.

Once the screen has been assigned to the designated areas, select the Security tab to determine the users who have access to the screen.

If desired, select the Interactions tab to perform one of the following actions:

Add Interaction

Within the Interactions tab, add one of the following Interactions to the screen:

Hide Panel

- Click Add and click Hide Panel
- Select the panel to be hidden.
- Click Add Condition and identify the conditions in which the panel is to be hidden on the screen.
- Once all hide conditions have been identified, click OK.

Hide Field

- Click Add and click Hide Field.
- Select the field to be hidden.
- Click Add Condition and identify the conditions in which the field is to be hidden on screen.
- Once all hide conditions have been identified, click OK.

Hide Row

- Click Add and click Hide Row.
- Select the grid panel to be evaluated for hide conditions.
- Click Add Condition and identify the conditions in which rows within the panel are to be hidden.
- Once all hide conditions have been identified, click OK.

Validate Field

- Click Add and click Validate Field.
- Select the field to be validated.
- Click Add Condition and identify the conditions, where when true the value entered in the field is invalid.

- Once all validation conditions have been identified, click OK.

Copy Interaction

The Copy function enables users to duplicate the logic and structure of an existing Interaction. The existing interaction can be used as a base for creating a new interaction. After copying an interaction, users are able to add, modify or delete conditions.

- To copy an existing interaction, select the desired interaction within the Interactions grid and click Copy.
- Once the interaction has been copied, it appears as a new line item in the Interactions grid.

Edit Interaction

The Edit function enables users to revisit an existing interaction and modify the existing conditions to enhance usability.

- To edit an existing interaction, select the desired interaction from within the grid, and click Edit.

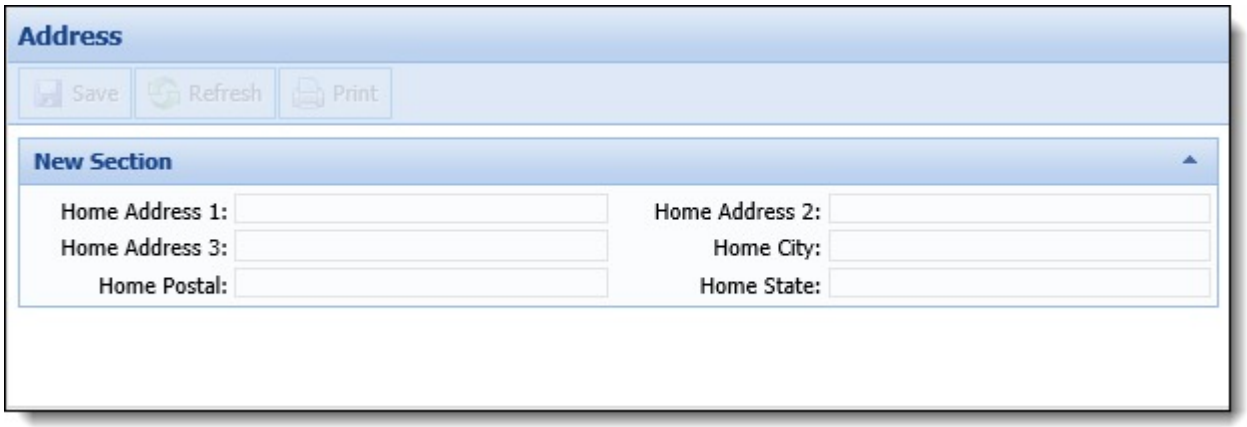
Delete Interaction

The Delete function enables users to remove an existing interactions and all of its conditions from a screen.

- To delete an existing interaction, select the desired interaction and click Delete.
- A Confirmation Message appears. Click **Yes** to delete the interaction. Click **No** to retain the interaction.

Upon completion of all screen attributes, click Preview for a view of the completed screen. A preview window appears displaying a rendition of the screen.

> Previewing a screen can be done at any point during creation of the screen, but is important to perform just prior to clicking Save. Doing so allows mistakes to be found before the screen is opened in the workspace.



When finished viewing the preview, click the **X** at the top right corner of the browser window. Any necessary changes can be made on the Screen window.

Once all updates have been made to the user-defined screen, click **Save and Close** to finalize the creation of the screen.

The newly created screen now populates within the Screens page.

Copying a Screen

The Copy function enables administrators to duplicate the structure of an existing user-defined screen. The existing screen can be used as a base for creating a new screen. After copying a screen, users are able to add, modify, or delete screen attributes and then save it with a different name in order to create a new user-defined screen.

- To copy an existing user-defined screen, select the desired screen within the grid on the Screens page and click Copy.
- Once the screen name has been changed and the attributes updated, click Save and Close to retain the changes and finalize the creation of a new screen.

Editing a Screen

The Edit function enables administrators to revisit an existing user-defined screen and modify the existing logic/structure to enhance usability.

> With the exception of Name and Instructions, users are unable to modify the content of System-Defined screens.

- To edit an existing user-defined screen, select the desired screen and click Edit.
- Once the desired updates have been made to the screen attributes, click Save and Close to finalize the screen modifications.

Deleting a Screen

The Delete function enables administrators to remove an existing user-defined screen and all of its existing logic to enhance usability.

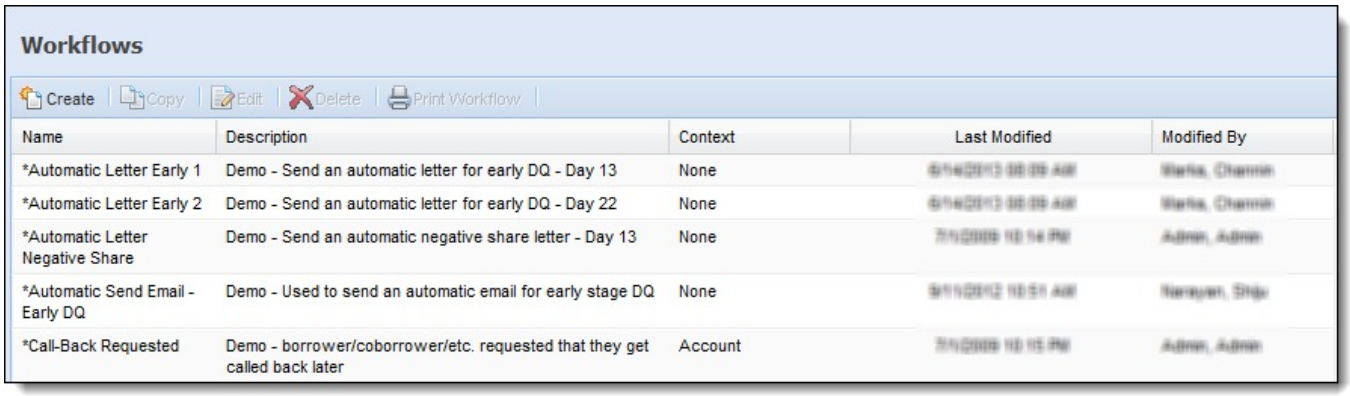
> System-Defined screens cannot be deleted.

- To delete an existing screen, select the desired screen and click Delete.
- A Confirmation Message appears. Click **Yes** to delete the user-defined screen. Click **No** to retain the user-defined screen.

Workflows

The Workflows page allows administrators to create and manage workflows. Workflows are used to document what occurs within an account, or case, and can be configured to be as basic or as complex as the creator desires.

To manage workflows, navigate to System Management > Workflow > Workflows.



Name	Description	Context	Last Modified	Modified By
*Automatic Letter Early 1	Demo - Send an automatic letter for early DQ - Day 13	None	[illegible]	[illegible]
*Automatic Letter Early 2	Demo - Send an automatic letter for early DQ - Day 22	None	[illegible]	[illegible]
*Automatic Letter Negative Share	Demo - Send an automatic negative share letter - Day 13	None	[illegible]	[illegible]
*Automatic Send Email - Early DQ	Demo - Used to send an automatic email for early stage DQ	None	[illegible]	[illegible]
*Call-Back Requested	Demo - borrower/coborrower/etc. requested that they get called back later	Account	[illegible]	[illegible]

Workflow view is filtered by context and displays those workflows that are Account-related, Case-related, both Account- and Case-related, and those that do not require an account or case (“None”).

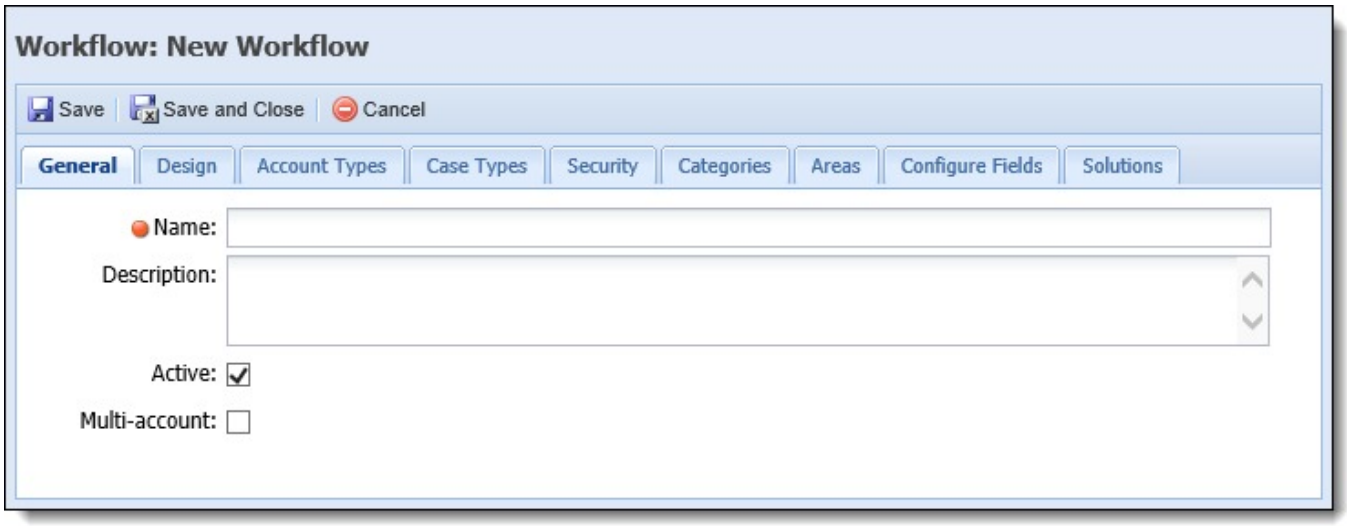
The following columns display within the Workflows page:

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Name</td><td>Name of the workflow.</td></tr>
<tr><td>Description</td><td>Description of the workflow.</td></tr>
<tr><td>Context</td><td>The level that the workflow is applied to, which is defined by the workflow steps added to the workflow. Reference the table below for an overview of each workflow context:
<table>
<tr><th>Workflow Context</th><th>Description</th><th>Example</th></tr>
<tr><td>Account</td><td>Workflow configured to include account-specific workflow steps, fields, or screens.</td><td>Next Contact Date Workflow Step</td></tr>
<tr><td>Case</td><td>Workflow configured to include case-specific workflow steps, fields, or screens.</td><td>Change Field Workflow Step configured to change the value of a Case Status</td></tr>
<tr><td>Both</td><td>Workflow configured to include a combination of Account and components.</td><td>Change Field Workflow Step configured to change the value of a Case Status, as well as a Change Field Workflow Step to set the value of an Account Flag.</td></tr>
<tr><td>None</td><td>Workflow configured to include components not specific to an account or case.</td><td>Post Comment Workflow Step</td></tr>
</table></td></tr>
<tr><td>Last Modified</td><td>Denotes when the last modification was made.</td></tr>
<tr><td>Modified By</td><td>Denotes who made the last modification.</td></tr>
</table>

Workflow Attributes

All workflows share common attributes that are defined while creating, copying, or editing a workflow.

General



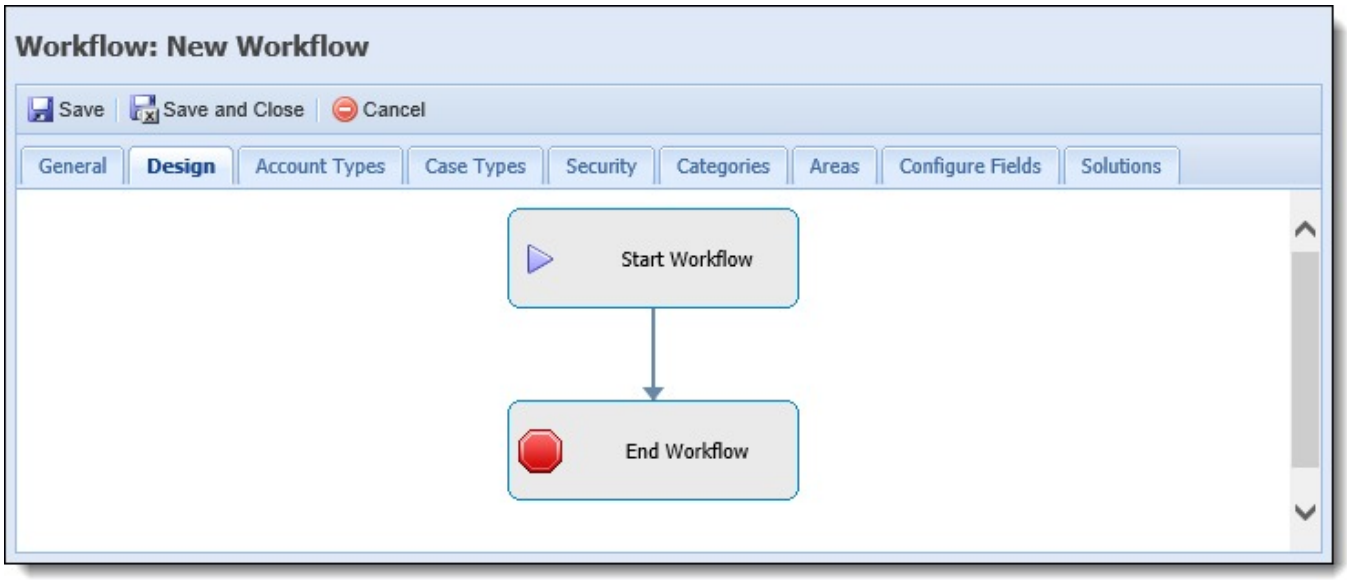
General attributes are located on the general tab:

Attribute	Description
Name	Name of the new workflow. This is a required field.
Description	Provide a description of the new workflow.
Active	Select whether the workflow is active in Temenos Infinity.
Multi-Account	Select whether the new workflow is multi-account.

When Multi-account is selected, only workflow steps that are multi-account capable appear within the Design tab when adding a new step to the workflow.

Design

The Design attribute provides administrators with the capability to create custom workflows.



Workflow steps can be added to the workflow design by right-clicking **Start Workflow** or **End Workflow**.

Workflow steps are displayed vertically under Start Workflow as they are added to the design.

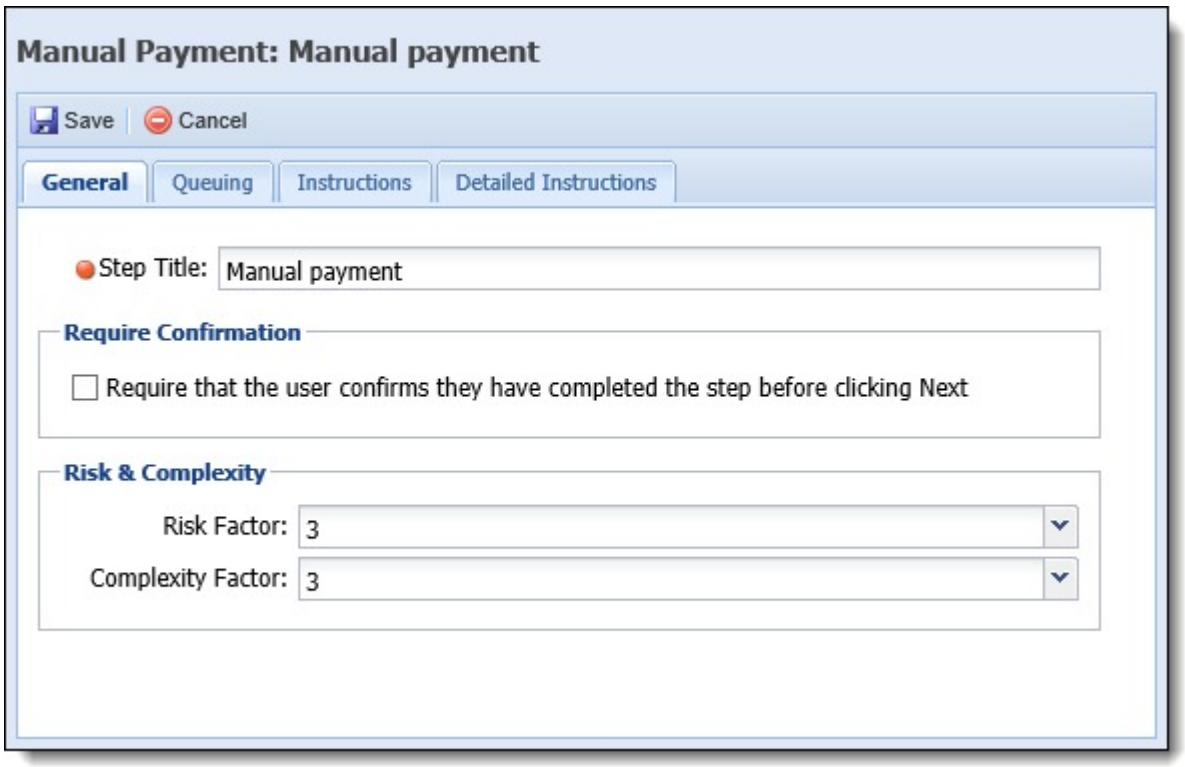
Workflow Step Attributes

All workflow steps share common General, Queuing, and Instruction attributes that are defined while creating, copying, or editing a workflow step.

Additional attributes may be defined for certain workflow steps.

General

The General tab allows administrators to define the basic information about the workflow step.



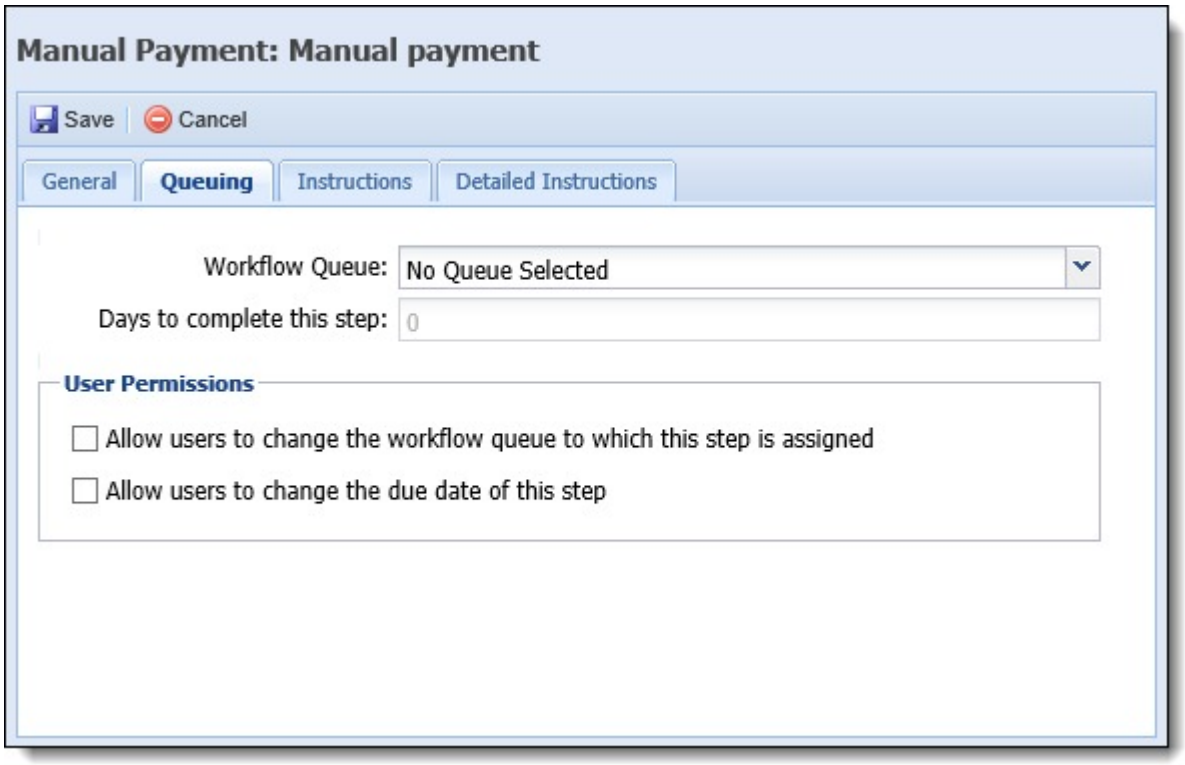
The following attributes are defined within the General tab:

Attribute	Description
Step Title	Provide a title for the workflow step. The title displays when the workflow step executes in the workflow.
Require Confirmation	If selected, the user must check the "I have completed this step" check box prior to clicking "Go To Next Step" when running the workflow.
Risk Factor	Determine the degree of risk if this step is not completed in a workflow. The higher the number, the higher the risk. This is used for reporting purposes
Complexity Factor	Determine the degree of complexity of the workflow step. Complexity is based on the degree of manual labor involved in executing the workflow. This is used for reporting purposes.

Queuing

If the workflow step is always automated, this tab is not available. If the workflow does not need to route into a different workflow queue, this tab can be skipped.

The Queuing tab allows administrators to assign the step to a specific Workflow Queue, determine the number of days to complete the step, as well as define user permissions for the workflow step.



The following attributes are defined within the Queuing tab:

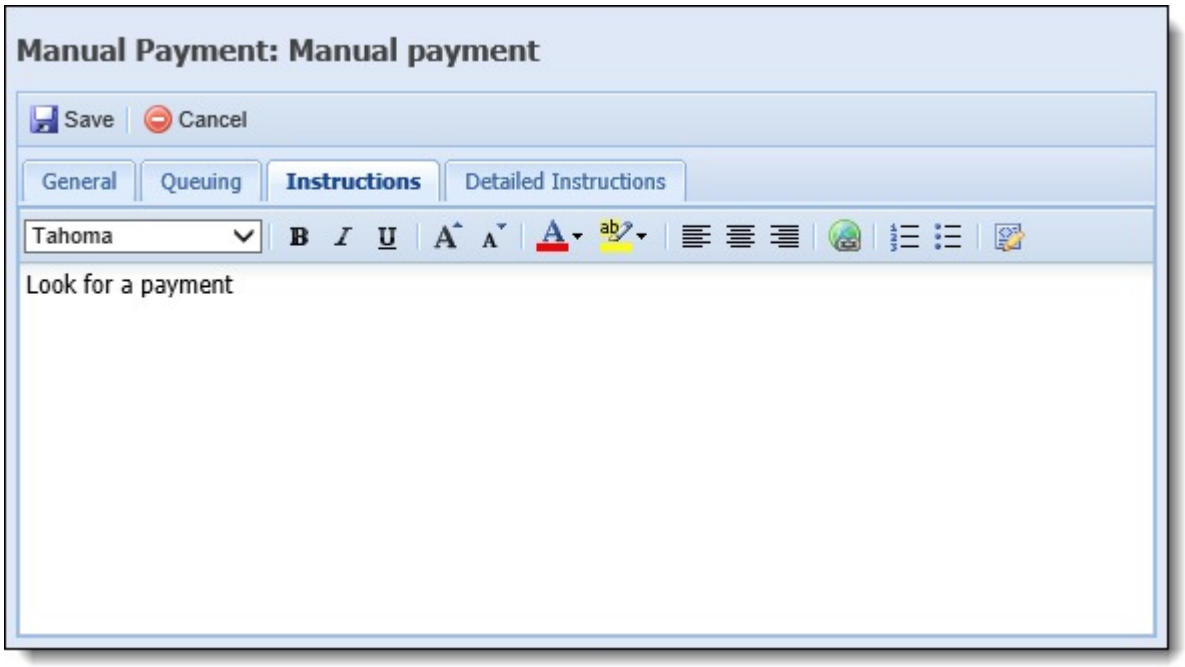
Attribute	Description
Workflow Queue	This drop-down contains all workflow queues in Temenos Infinity. If a user working the Workflow, does not have access to a chosen Workflow Queue, they receive a message stating that they are not permitted to work that step.
Days to complete this step	The administrator has the option to set the amount of days in which the task has to be completed. If a Workflow Queue has been chosen, this is a required field.
User Permissions	There are two User Permissions that can be set by the administrator. **User Permission** — **Description** Allows users to change the workflow queue to which this step is assigned — Select this box to display a drop-down of all the service queues available in the workspace and allow the user to assign the task to another Workflow Queue. Allow users to change the due date of this step — Select this box to allow users to change the due date for the workflow step.

Instructions

If the workflow step is always automated, this tab is not available.

The Instructions tab allows administrators to define a basic set of instructions for running the workflow in the

workspace. The instructions appear to the right of the workflow step that is open in the workspace.

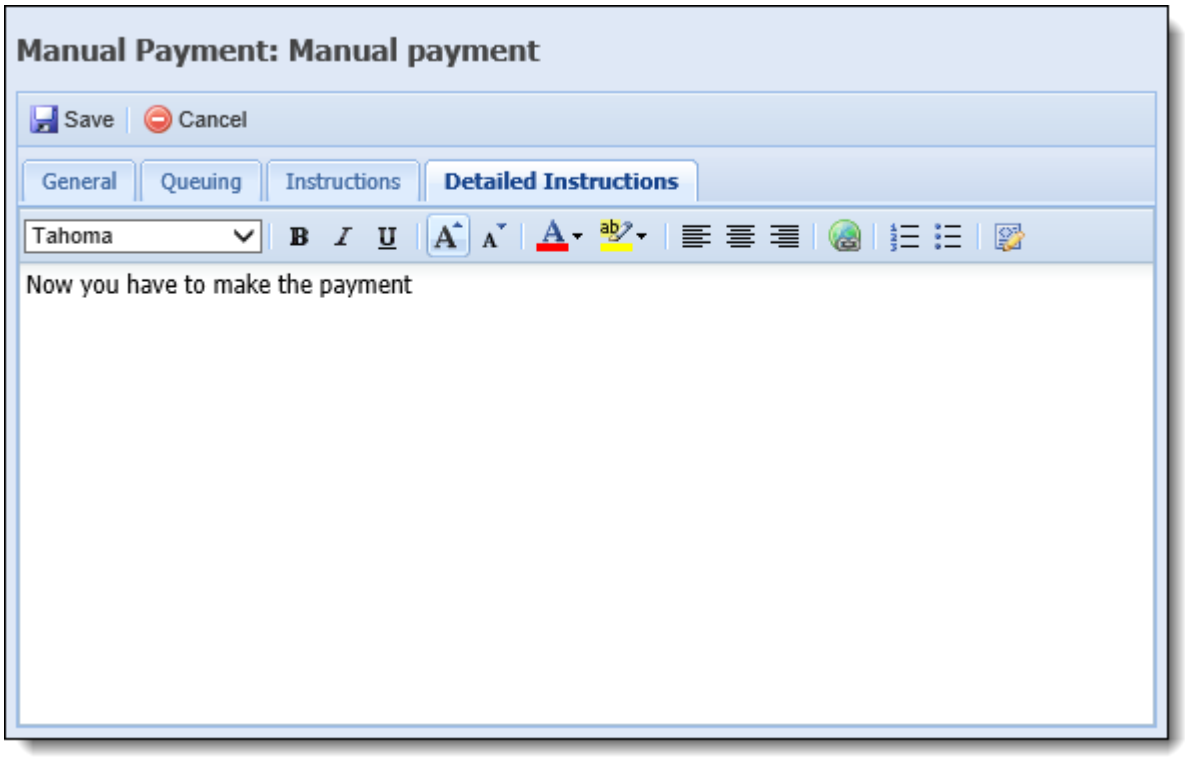


> If there are more instructions than what fits in the Instructions window, administrators are able to add more instructions within the Detailed Instructions tab.

Detailed Instructions

> If the workflow step is always automated, this tab is not available.

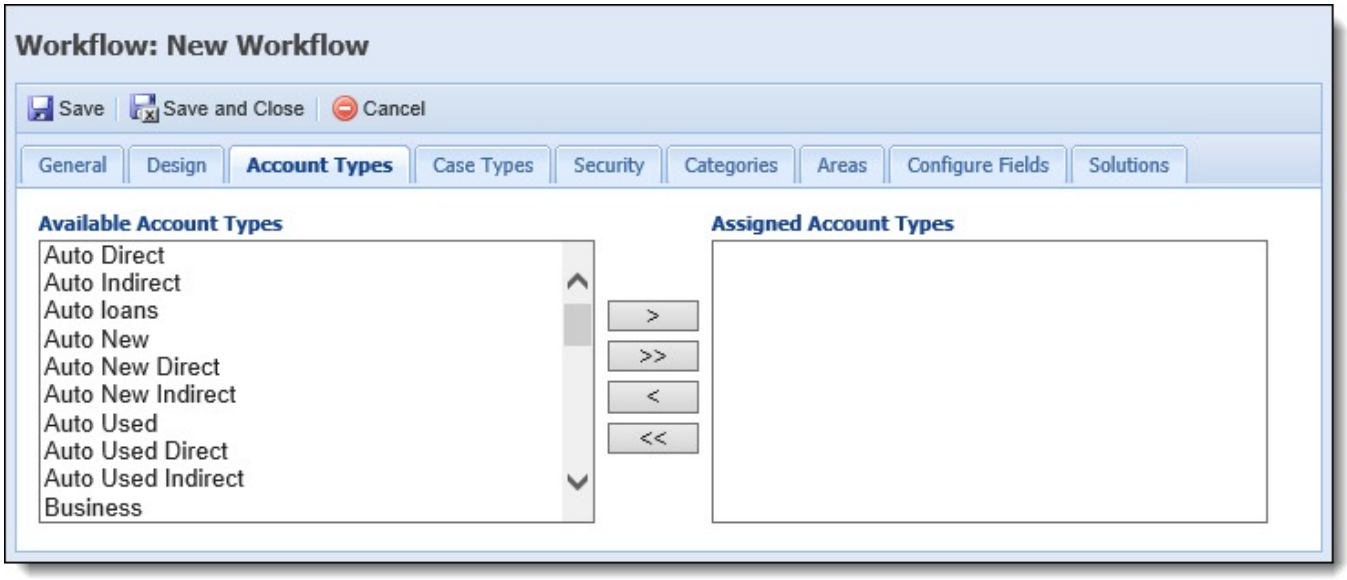
The Instructions tab allows administrators to define a more robust set of instructions that display while running the workflow in the workspace.



When processing a workflow, users are able to view the Detailed Instructions by clicking View Detailed Instructions.

Account Types

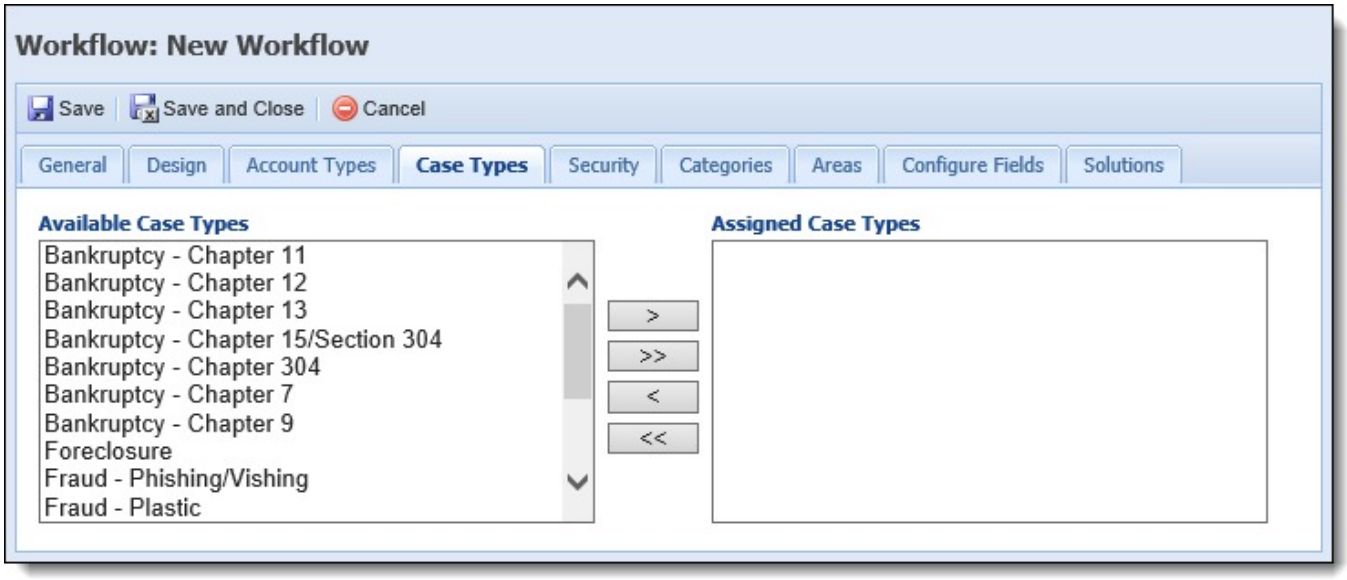
Administrators can assign account types to have access to the new workflow on the account types tab.



Attribute	Description
Assign Account Types	Select Account Types from the Available Account Types list and move them to the Assigned Account Types list to provide access to the workflow.

Case Types

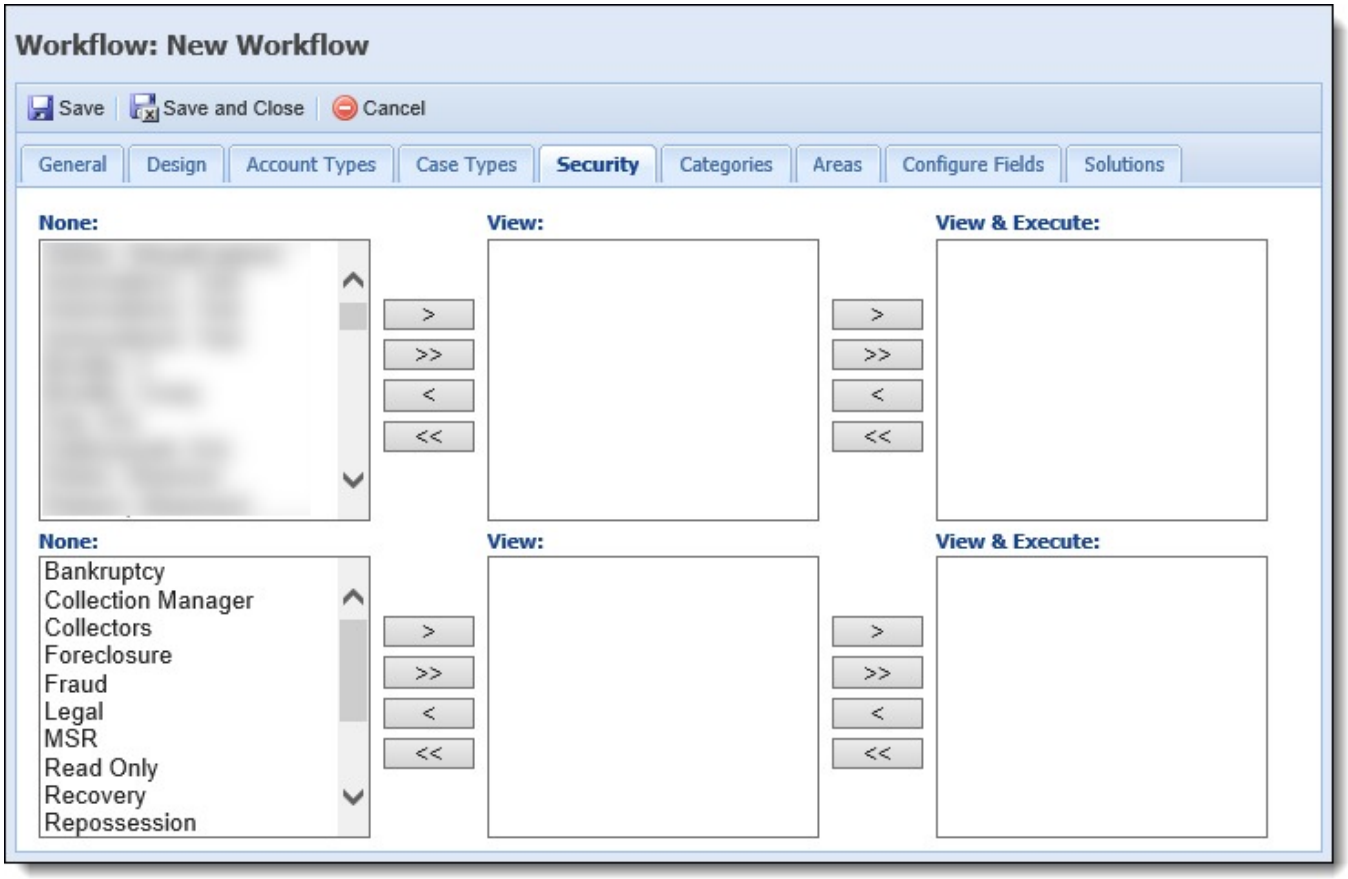
Administrators can assign case types to have access to the new workflow on the case types tab.



Attribute	Description
Assign Case Types	Select Case Types from the Available Case Types list and move them to the Assigned Case Types list to provide access to the workflow.

Security

Administrators can assign the level of access a user has to a workflow on the security tab.



Attribute	Description
Assign Users	Assign a level of access to indvidual users by selecting users and moving them between columns:

Access Level	Description
None	Users assigned to "None" are not able to execute the workflow or see it in the Workflow History screen.
View	Users assigned to "View" can view workflow details in the Workflow History screen but cannot execute the workflow.
View and Execute	Users assigned to "View and Execute" can execute the workflow and view the details in the Workflow History screen.

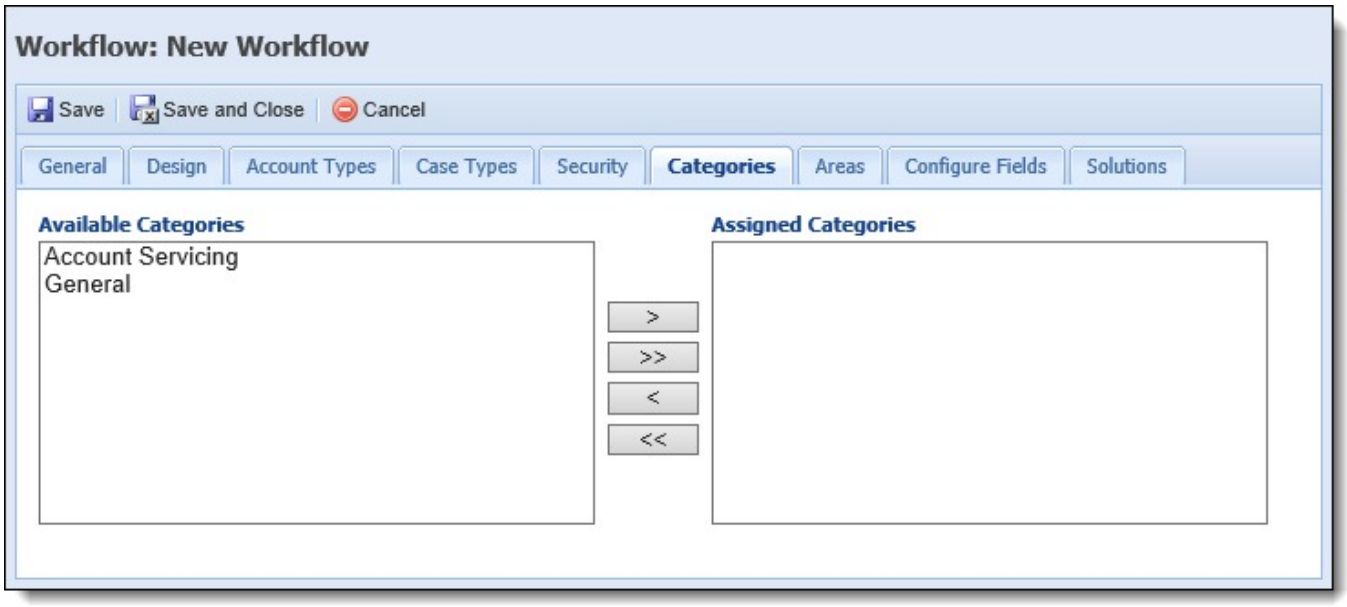
Assign Groups	Assign a level of access to a group of users by selecting the group and moving it between columns:

Access Level	Description
None	A group assigned to "None" is not able to execute the workflow or see it in the Workflow History screen.
View	A group assigned to "View" can view workflow details in the Workflow History screen but cannot execute the workflow.
View and Execute	A group assigned to "View and Execute" can execute the workflow and view the details in the Workflow History screen.

Users are able to right-click on an active workflow to complete it if they have View or View & Execute permissions.

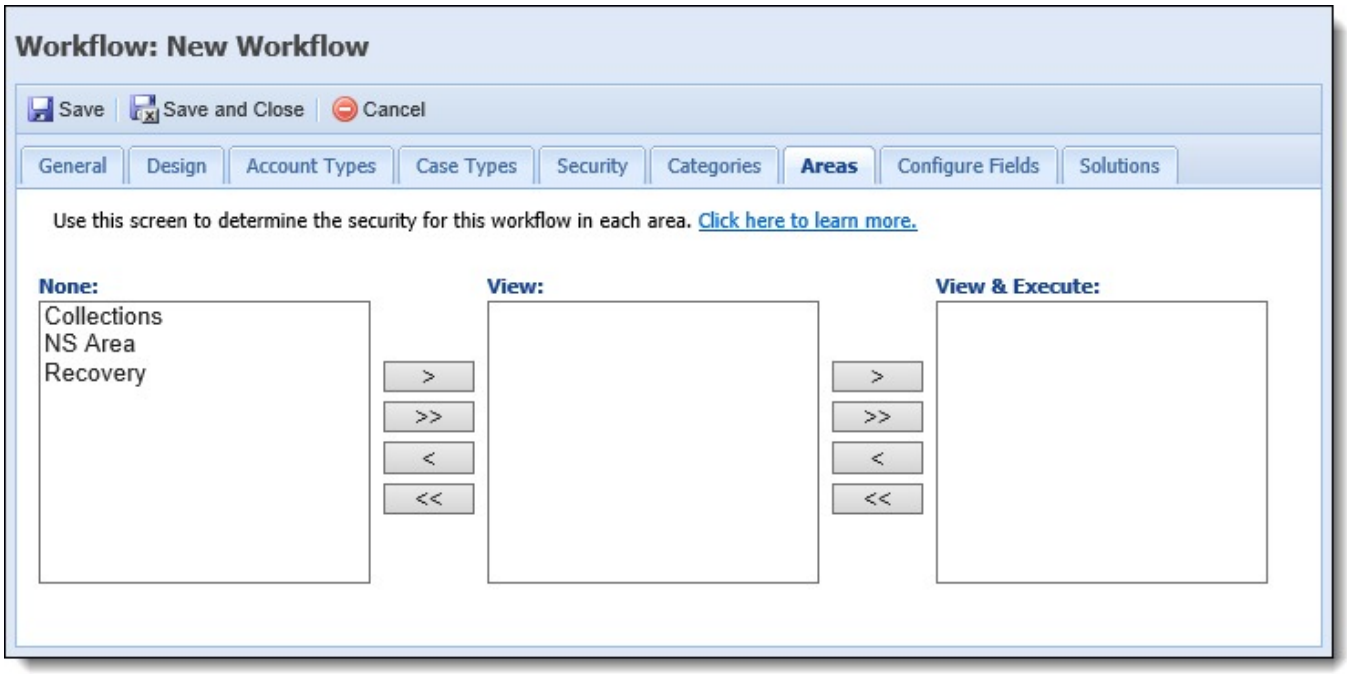
Categories

Assign specific categories to have access to the new workflow.



Areas

For each area, determine the level of access for the workflow in the Areas tab.



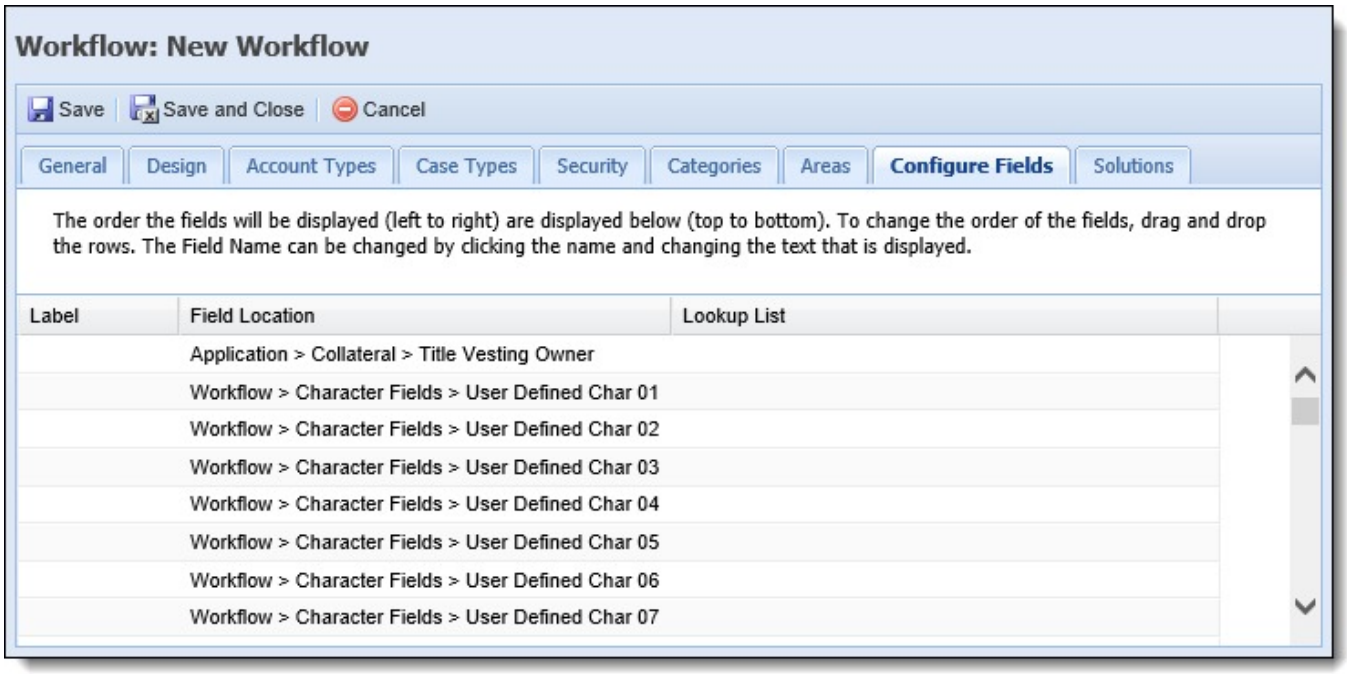
Attribute	Description
Assign Areas	Assign a level of access to each area by selecting the areas and moving them between columns:

Access Level	Description
None	Areas assigned to "None" are not able to execute the workflow or see it in the Workflow History screen.
View	Areas assigned to "View" can view workflow details in the Workflow History screen but cannot execute the workflow.
View and Execute	Areas assigned to "View and Execute" can execute the workflow and view the details in the Workflow History screen.

For a user to have access to the workflow on an Area, the workflow must be assigned to the area and the user must have access to the workflow individually or through a security group.

Configure Fields

While this tab is available within the Workflow configuration window, the functionality in the Configure Fields tab is not currently supported in Temenos Infinity.



To rename a configured field administrators must:

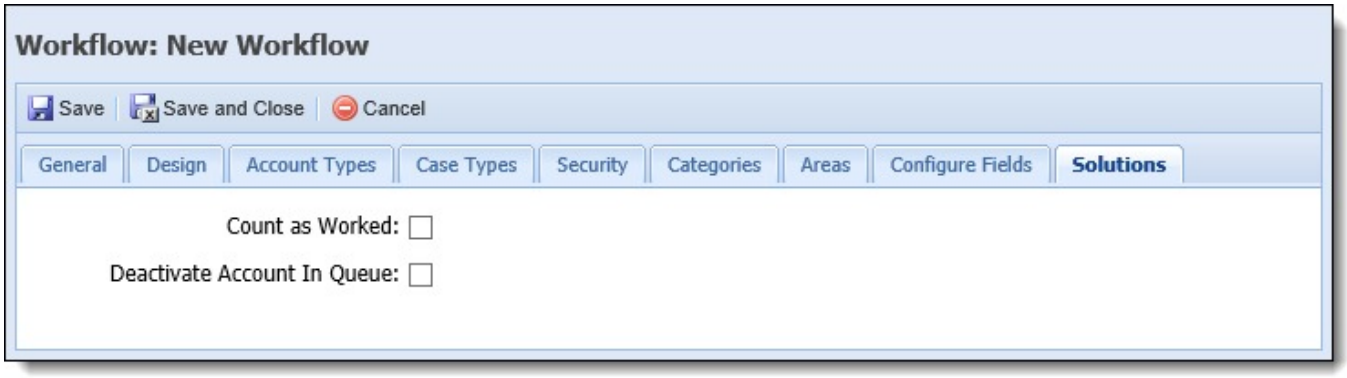
- Click the field's corresponding Label slot. Type in the desired Label name.

  > Save the Configure Field step before adding it to a screen. This re-labels the fields in the fields list.

- Add the "View Screen" workflow step as a part of the workflow. Within the screen tab, create a new screen.
- Within the "Screen Design" tab select the field under the workflow folder that was re-named in the configure fields tab and click **Add Field**. The field appears in the screen and is included as a part of the workflow.

Solutions

Solutions allow the administrator to select if running this workflow should count as a user worked the account and whether the account should be deactivated in the queue.



Attribute	Description

Count as Worked	If selected, indicates that the completion of this workflow should count as a worked account in performance reporting. When Count as Worked is set true for a Batch or Automated workflow, the Account > Account Flags > Worked Flag is set to true for the applicable accounts when the workflow completes. The Worked? field is also updated to Yes within the Fields tab in the Workflow History details.
Deactivate Account in Queue	If selected: • Worked accounts are removed from the queue once the workflow is complete. • The worked account does not return with the Get Next option while working a queue after the workflow is executed. • If the Related Accounts panel is configured to include **Queue Info**, the icon for the worked account updates within the panel column to reflect that the account was removed from the queue. For more information on **Queue Info** within Related Account, see the Workspace Overview section of this guide.

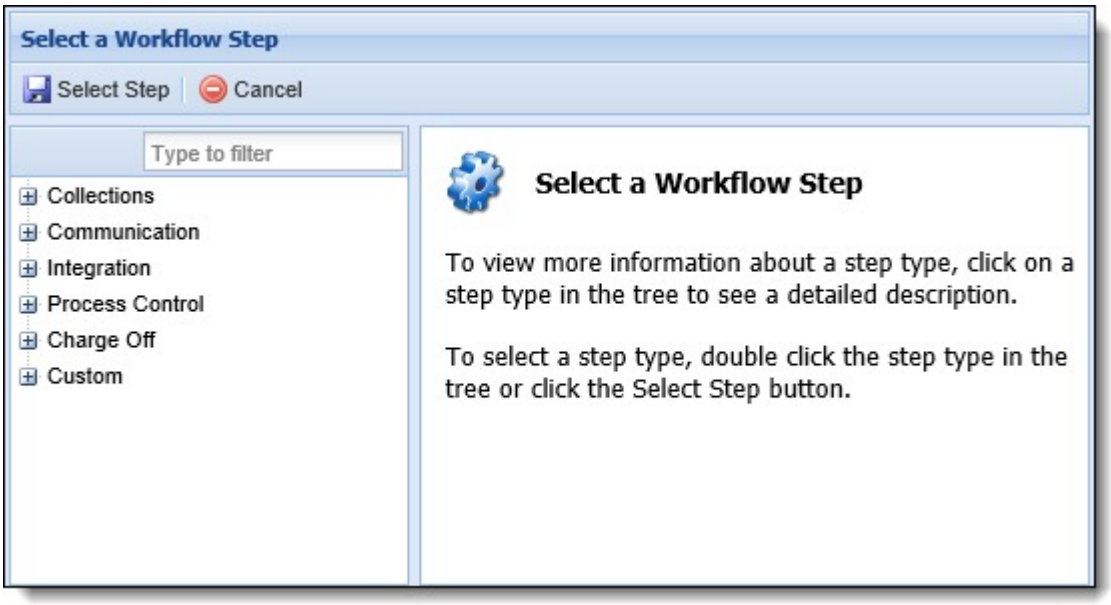
Creating and Managing Workflows

The Workflows page allows administrators to perform the following actions:

Creating a Workflow

To create a workflow:

- Click **Create**.
- The New Workflow window appears.
- Define the General attributes.
- When the General attributes are defined, navigate to the Design tab to build the workflow by adding workflow steps.
  - Right-click **Start Workflow** and select **New Step After**.
  - The Select a Workflow Step screen opens.



  - Select the desired step, and click **Select Step**.
  - The Step Properties window opens.
  - Complete each tab within the Step Properties window to configure the workflow step.
- Once all workflow steps are added, select the Account Types tab to assign account types to the workflow, and then the Case Types tab to assign case types to the workflow.
- After assigning account types and case types, navigate to the Security tab to assign users and security groups permission to the workflow.
- When all users are assigned to the workflow, navigate through the Categories and Areas tabs to assign the workflow to sections of the workspace.
- Navigate to the Solutions tab to determine if the workflow should count as a worked account, and/or deactivated in the queue.
- When all attributes are defined, click **Save** or **Save and Close** to create the new workflow and return to the Workflows page. The new workflow populates in the grid and is available to the users and/or groups who have permission to run the workflow on a case, person or account, depending on the context to which the workflow is assigned.

Copying a Workflow

- Select a workflow to highlight it and click **Copy**.
- The Copy of Workflow screen appears. Navigate through the tabs and make any necessary changes.
- Click **Save** or **Save and Close** to save the new workflow and return to the Workflows page. The new workflow populates in the grid and is now available to users and/or groups, who have permission to run the workflow on a person, account, or case depending on the context to which the workflow is assigned. Click **Cancel** to return without saving.

Editing a Workflow

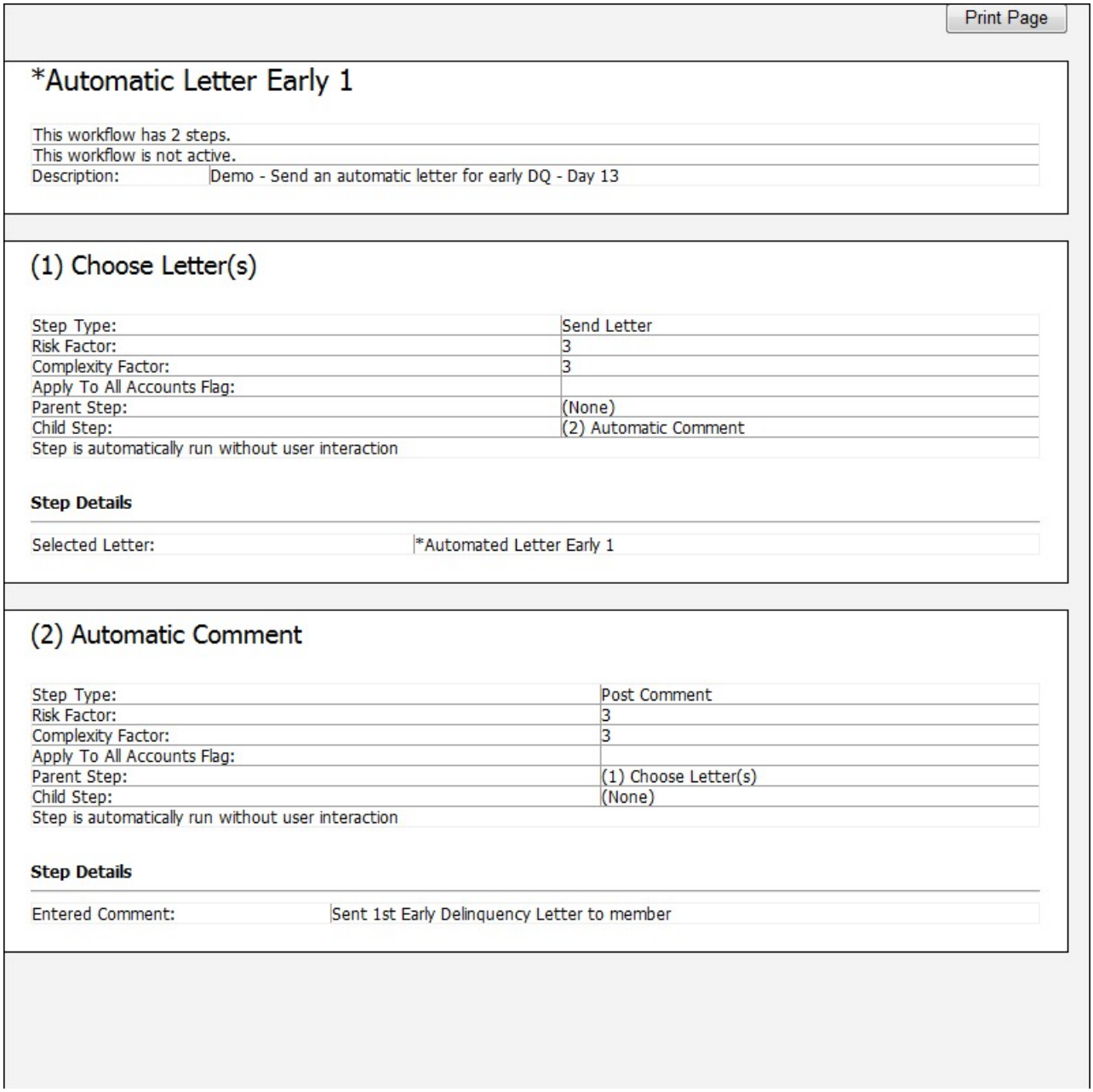
- Select a workflow to highlight it and click **Edit.**
- The Edit Workflow screen appears. Navigate through the tabs and make any necessary changes.
- When finished making edits click **Save** or **Save and Close** to save the changes and return to the Workflows page. Click **Cancel** to return without saving.

Deleting a Workflow

- Select a workflow to highlight it and click **Delete.**
- A confirmation message appears. Click **Yes** to delete the workflow. Click **No** to return to the Workflows page without deleting.

Printing a Workflow

- Select a workflow to highlight it and click **Print Workflow**.
- A preview screen appears. Click **Print Page** in the top right to print the workflow summary.



Print Page

*Automatic Letter Early 1

This workflow has 2 steps.	
This workflow is not active.	
Description:	Demo - Send an automatic letter for early DQ - Day 13

(1) Choose Letter(s)

Step Type:	Send Letter
Risk Factor:	3
Complexity Factor:	3
Apply To All Accounts Flag:	
Parent Step:	(None)
Child Step:	(2) Automatic Comment
Step is automatically run without user interaction	

Step Details

Selected Letter:	*Automated Letter Early 1

(2) Automatic Comment

Step Type:	Post Comment
Risk Factor:	3
Complexity Factor:	3
Apply To All Accounts Flag:	
Parent Step:	(1) Choose Letter(s)
Child Step:	(None)
Step is automatically run without user interaction	

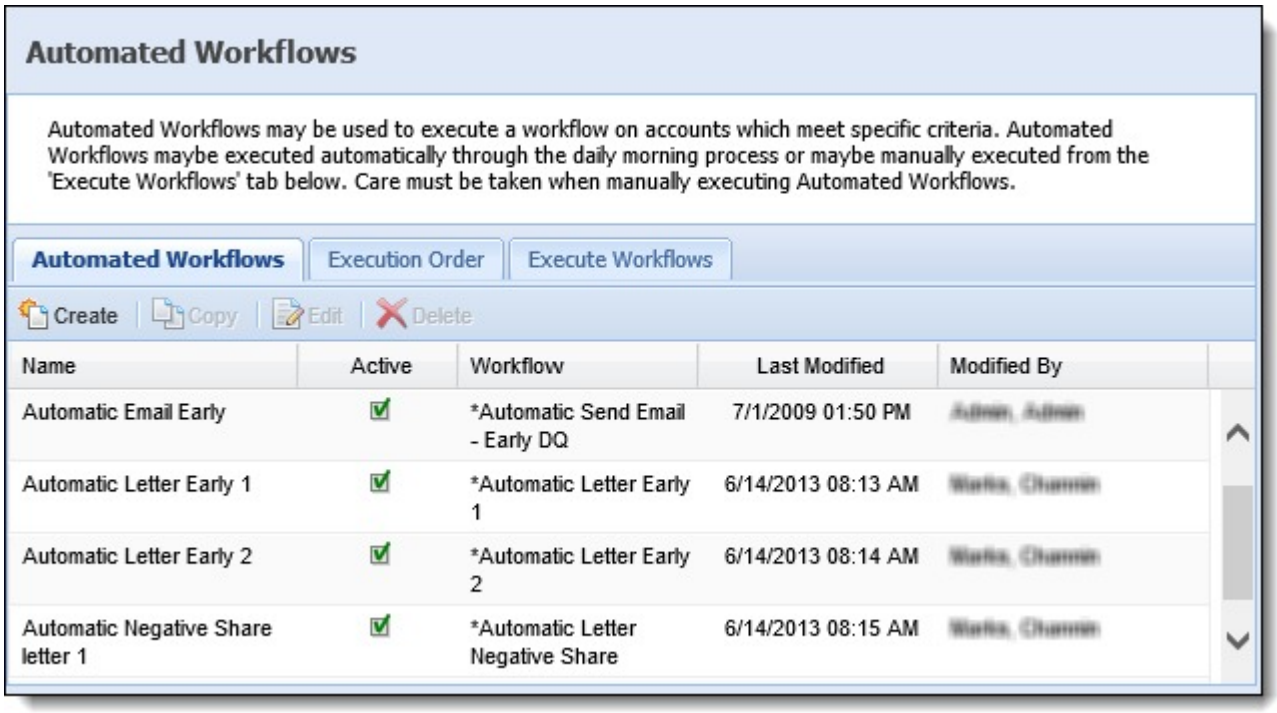
Step Details

Entered Comment:	Sent 1st Early Delinquency Letter to member

Automated Workflow

Automated Workflows are used to automatically execute a workflow on accounts or cases that meet specified criteria. Administrators can select workflows to be automated and executed daily during the morning batch process, or executed on a schedule defined by the financial institution. Automated workflows are managed in the System Management > Workflows > Automated Workflow page.

There are three tabs displayed within this page: Automated Workflows, Execution Order, and Execute Workflows.

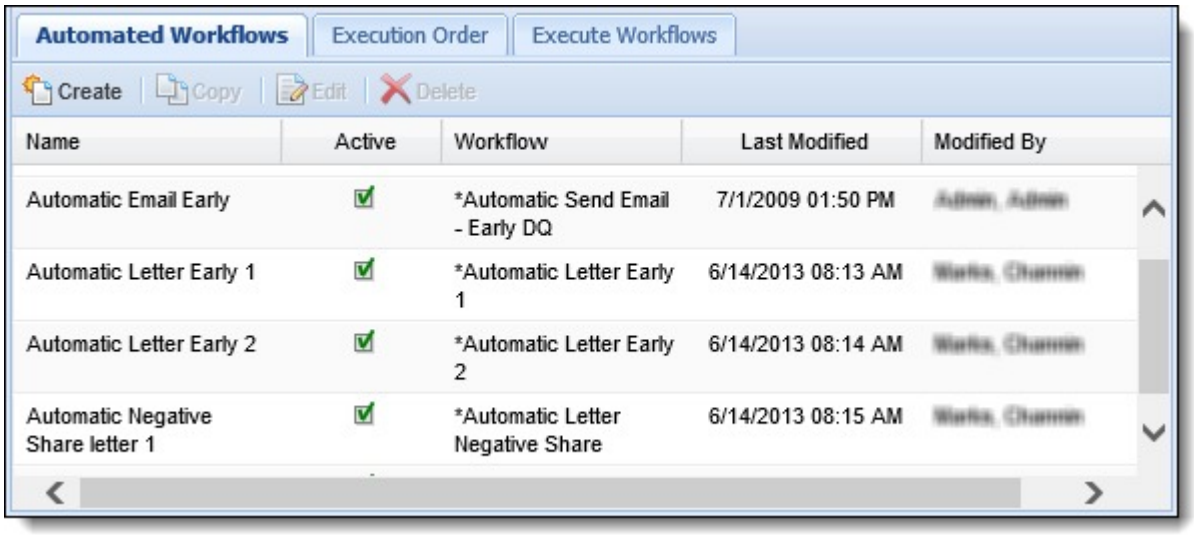


> Only workflows that have automated steps can be used in automated workflows. If a manual step is included in an automated workflow, the workflow is "suspended" and is marked as Active on the Workflow History screen in the workspace.

For a list of workflow steps that are automated, please see the Workflow Steps section of the End User Guide.

Automated Workflows

All automated workflows within Temenos Infinity are managed from the Automated Workflows tab. This tab is displayed by default when opening the Automated Workflows page in System Management.



The following columns display within the Automated Workflows tab:

Column Name	Description
Name	Displays the name of the automated workflow.

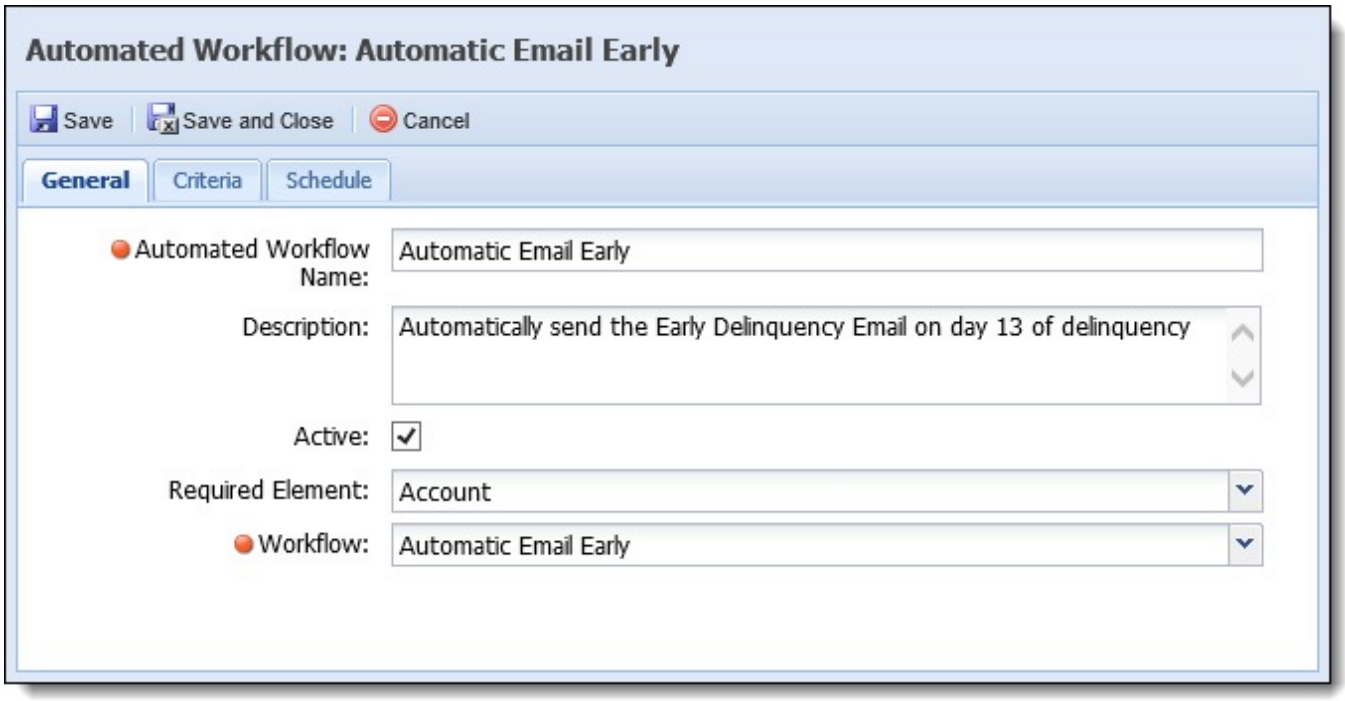
Active	Displays a ☑ if the automated workflow is active.
Workflow	Displays the name of the workflow that is run as a part of the automated workflow.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification.

Automated Workflow Attributes

All automated workflows share common attributes that are defined while creating, copying, or editing an automated workflow.

General

General attributes provide administrators with the ability to define the basic information pertaining to automated workflows.



The following attributes are located on the General tab:

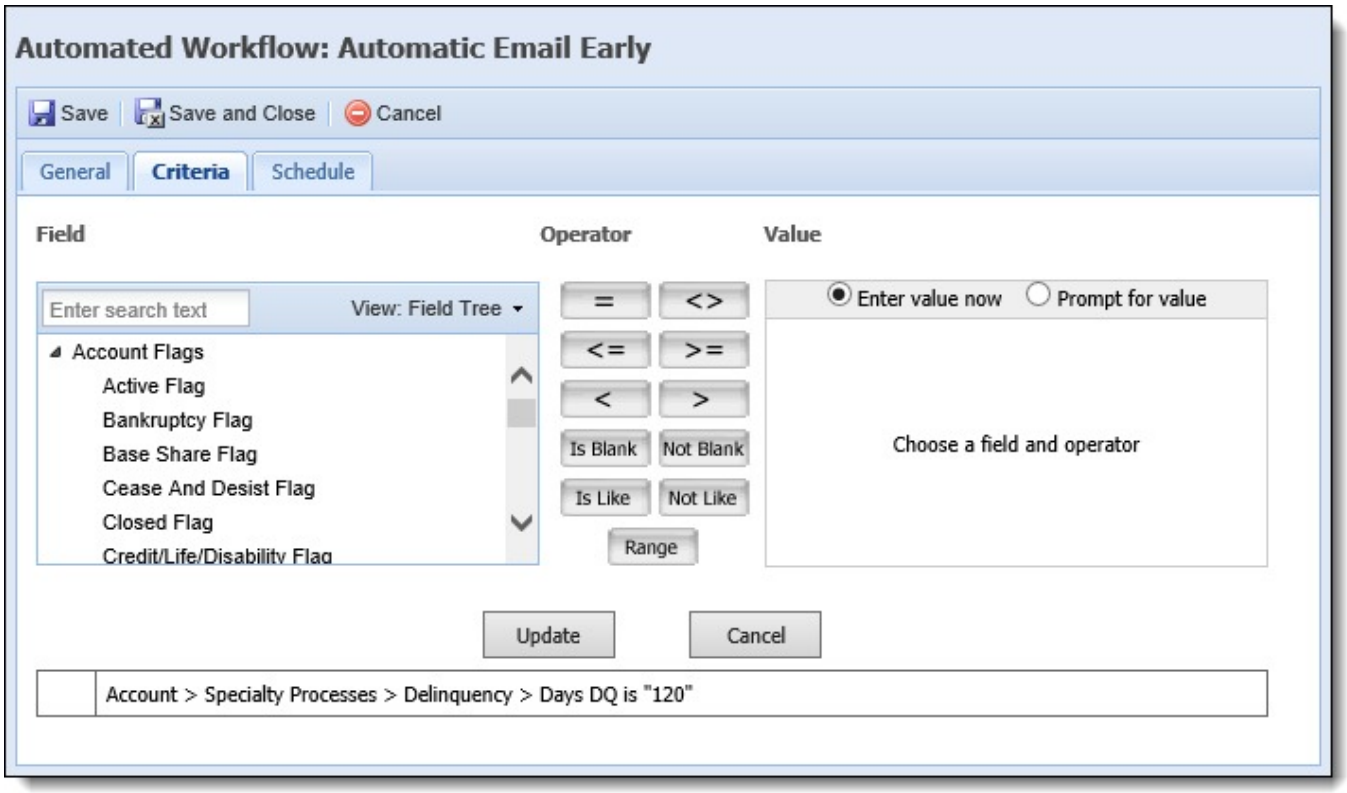
Attribute	Description
Automated Workflow Name	Enter a name for the automated workflow. This field is required.
Description	If desired, enter additional details about the automated workflow.
Active	Select this check box to activate the automated workflow.
Required Element	From the drop-down, select the level in which the automated workflow runs (Account or Case).
Workflow	From the drop-down, select the workflow to run as a part of the automated workflow.

Criteria

Criteria attributes provide administrators with the ability to determine on which accounts and persons the automated workflow runs by using the standard criteria builder.

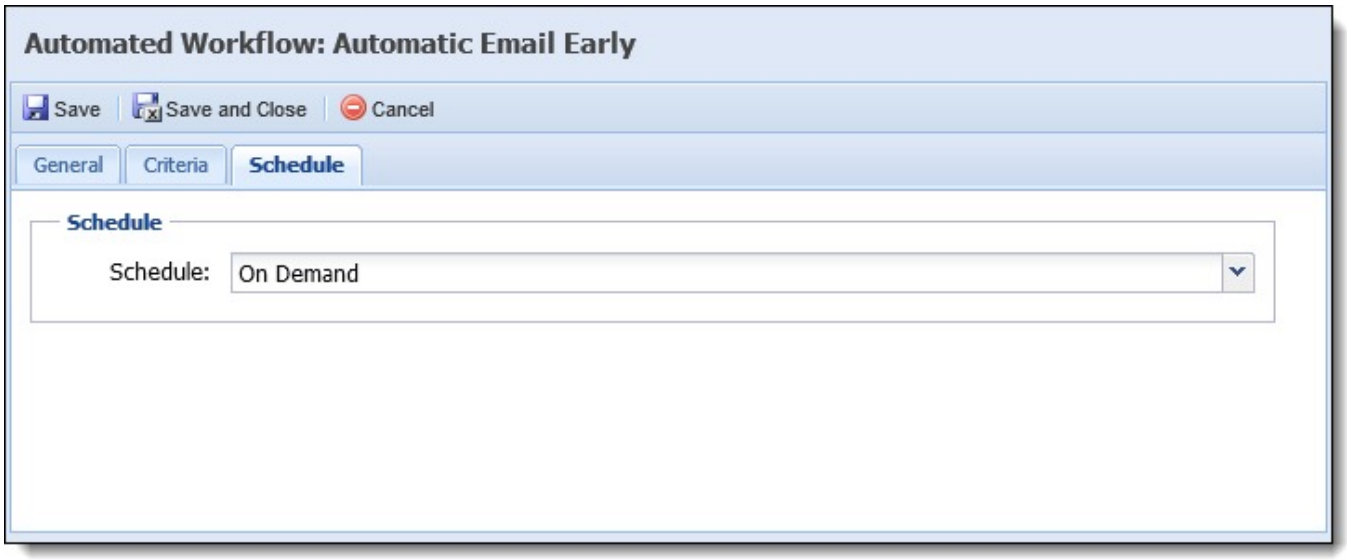
For more information on the criteria builder, please see the Criteria Builder Help topic in this guide.

Primary fields, not Person fields, are available when setting the criteria for an automated workflow.



Schedule

Schedule attributes provide administrators with the ability to define when an automated workflow runs.



Select one of the following runtime options from the Schedule drop-down:

Schedule Option	Description
On Demand	Select **On Demand** to manually run the automated workflow by clicking Execute on the Execute Workflows tab.
Daily	Select **Daily** for the workflow to run automatically each day without user intervention. When Daily is selected, a Time drop-down appears to select the specific run time. After upgrading to release 16 or higher, any automated workflows configured in the prior Temenos Infinity release automatically have the schedule set to Daily, with a run time similar to when the workflow executed in the prior release.

Weekly	Select **Weekly** for the workflow to run once a week without user intervention. When Weekly is selected, check boxes for each day of the week appear to allow the administrator to select the specific run day. The Time drop-down also appears to select the specific run time.
Monthly	Select **Monthly** for the workflow to run once a month without user intervention. When Monthly is selected, a Date of Month drop-down appears to select the specific day of the month that the workflow is to be run. The Time drop-down also appears to select the specific run time.

Creating an Automated Workflow

- To create an automated workflow, click **Create** on the Automated Workflows tab.
- The New Automated Workflow screen appears. Define any necessary attributes for the automated workflow.
- When finished entering all information, click **Save** or **Save and Close** to save the new automated workflow and return to the Automated Workflows page. The new automated workflow populates in the list and runs during the daily process as scheduled.

Copying an Automated Workflow

- To copy an automated workflow, select an automated workflow within the Automated Workflows tab and click **Copy**.
- The Copy Automated Workflow screen appears. Make any necessary changes to the automated workflow.
- When finished entering all information, click **Save** or **Save and Close** to save the new automated workflow and return to the Automated Workflows page. The new automated workflow populates in the list and runs during the daily process as scheduled.

Editing an Automated Workflow

- To edit an automated workflow, select an automated workflow within the Automated Workflows tab and click **Edit**.
- The Edit Automated Workflow screen appears. Make any necessary changes to the automated workflow.
- When finished entering all information, click **Save** or **Save and Close** to save the automated workflow and return to the Automated Workflows page.

Deleting an Automated Workflow

- To delete an automated workflow, select an automated workflow within the Automated Workflows tab and click **Delete**.
- A confirmation message appears. Click **Yes** to delete the automated workflow. Click **No** to retain the automated workflow and return to the Automated Workflows page.

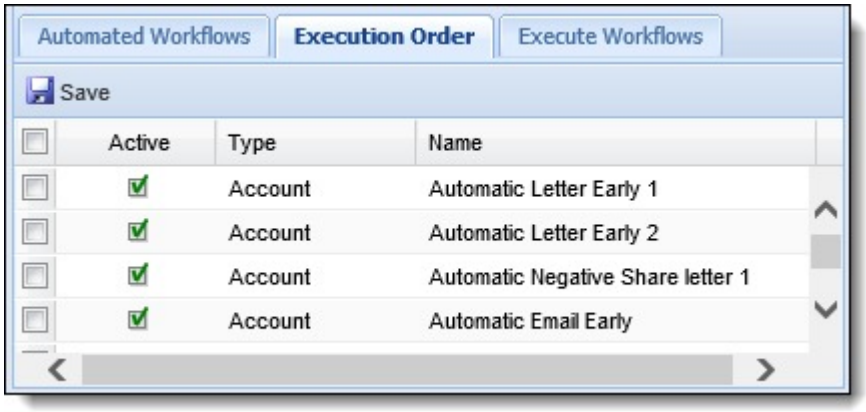
Automated Workflow Tips and Tricks

Automated workflows can be configured as a part of a multi-account workflow or a single-account workflow. When ran as a single-account versus a multi-account workflow, different results are produced. A good example of this is incorporating a send letter or send email workflow step as a part of an automated workflow.

- If the send letter or send email workflow step is incorporated as a part of a multi-account automated workflow, all of the account's information populates on one letter or email and the primary recipient receives one letter or email.
- If the send letter or send email workflow step is incorporated as a part of a single-account automated workflow, a separate letter or email is sent for each account and only contains that account's specific information.
- When an automated letter or email workflow is run on an account, a single letter or email is generated for each related person on each account based on the roles configured for the letter or email.

Execution Order

Administrators can set the order in which automated workflows are executed within the Execution Order tab. This feature is useful if an account meets criteria for multiple workflows. A higher workflow in the list on the Execution Order tab takes precedence over a workflow that is lower in the list.



The following columns display within the Execution Order tab:

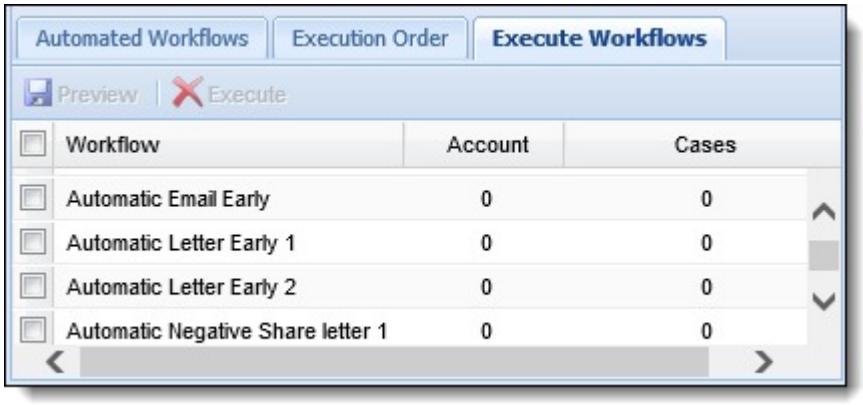
Column Name	Description
Active	Displays a ☑ if the automated workflow is active.
Type	Displays the level in which the automated workflow runs (Account or Case).
Name	Displays the name of the automated workflow.

Arranging the Execution Order

- To rearrange the automated workflow execution order, select one or more automated workflows to be moved.
- Click and drag the automated workflow to its desired location within the workflows list. A green check mark appears when the location is an acceptable place to relocate the workflow.
- When finished rearranging the order, click **Save**. A success message appears indicating the changes were saved successfully.

Execute Workflows

Administrators can manually execute automated workflows outside of the normal daily processing the defined runtime schedule through the Execute Workflows tab.



The following columns display on the Execute Workflows tab:

Column Name	Description
Workflow	Displays the name of the automated workflow.
Account	Displays the number of accounts that were affected by the Preview or Execute functions.
Cases	Displays the number of cases that were affected by the Preview or Execute functions.

From the Execute Workflows tab, administrators can manually Preview and Execute automated workflows.

Previewing an Automated Workflow

Previewing an automated workflow provides an administrator with the ability to assess the number of accounts or cases that would be affected if the automated workflow was executed at this point in time.

- To preview an automated workflow, select the automated workflow within the list and click **Preview**.
- A message appears indicating that the preview is complete and the list of workflows on the Execute Workflows tab is updated with the number of accounts or cases that would be affected by executing the automated workflow(s).

Executing an Automated Workflow

- To execute an automated workflow outside of daily processing its schedule, select the automated workflow within the list and click **Execute**.

- A message appears indicating that the workflow execution is complete and the list of workflows on the Execute Workflows tab is updated with the number of accounts or cases that were affected by the automated workflow execution. The Workflow History screen is also updated to reflect the execution of the workflow.

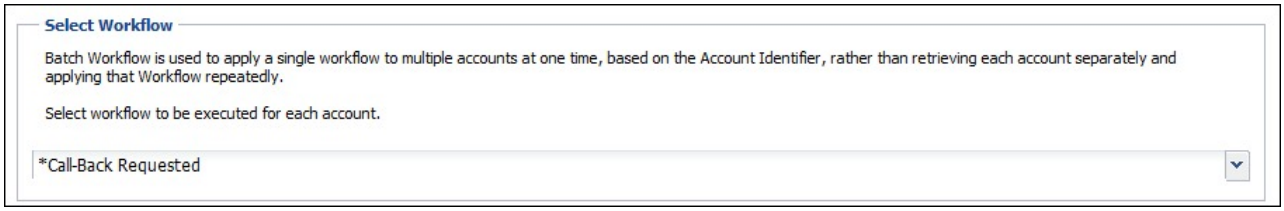
Batch Workflow

Batch Workflow allows administrators to use the Account Identifier to apply a single Workflow to multiple accounts at one time, rather than retrieving each account separately and applying the Workflow manually and repeatedly.

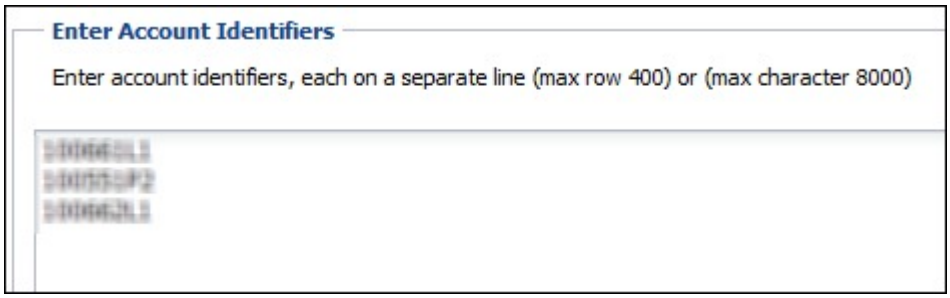
To Execute a Batch Workflow:

- Select a workflow from the **Select Workflow** drop-down. This drop-down contains all active workflows within the Framework.

> The workflow being used for the Batch Workflow should have all automated steps. If any manual step is in the workflow, the workflow runs and stops at that step, leaving the workflow active.



- Enter each account identifier on a separate line (maximum row 400) and (max character 8000) in the Enter Account Identifiers text box.



- Click **Execute**. A success message appears indicating the batch workflow completed successfully. The affected accounts/cases' workflow histories are reflected of the batch workflow running. Click **Cancel** prior to executing to clear the information on the screen without saving.

> If the account identifier is entered incorrectly or is not valid, an error message appears. Close the error message and enter the correct account identifier and run the process again.

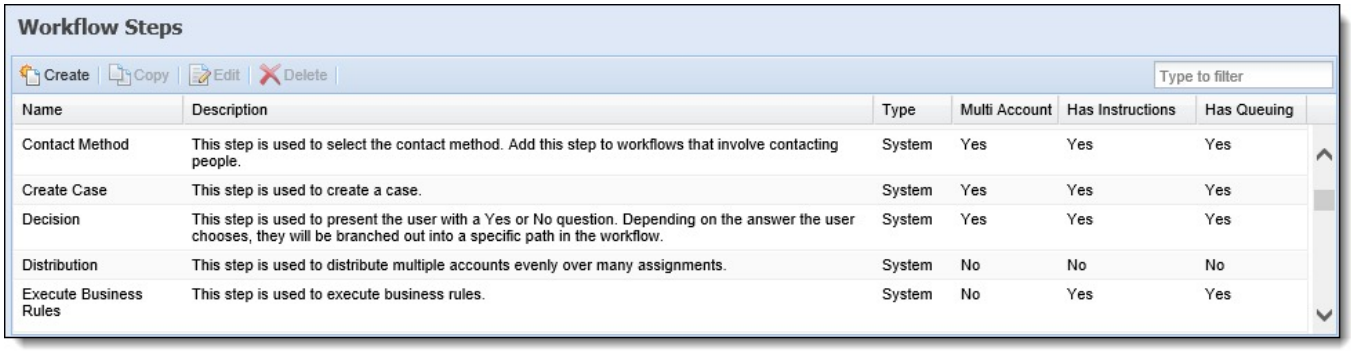
Workflow Steps

Workflow steps can be created to work with institution-specific custom functionality. These workflow steps are incorporated as a part of a workflow.

For example, if an institution uses Temenos Infinity's API functionality and creates their own webpage, a workflow step could be created to work with the website and perform a variety of actions, such as updating values in Temenos Infinity, or their own system.

Administrators can manage work flow steps by navigating to the System Management > Workflow > Workflows

Steps page.



Workflow Steps

Create | Copy | Edit | Delete | Type to filter

Name	Description	Type	Multi Account	Has Instructions	Has Queuing
Contact Method	This step is used to select the contact method. Add this step to workflows that involve contacting people.	System	Yes	Yes	Yes
Create Case	This step is used to create a case.	System	Yes	Yes	Yes
Decision	This step is used to present the user with a Yes or No question. Depending on the answer the user chooses, they will be branched out into a specific path in the workflow.	System	Yes	Yes	Yes
Distribution	This step is used to distribute multiple accounts evenly over many assignments.	System	No	No	No
Execute Business Rules	This step is used to execute business rules.	System	No	Yes	Yes

The following columns display on the Workflow Steps page:

Column Name	Description
Name	The name of the workflow step.
Description	Description of how the workflow step is used.
Type	Displays whether the workflow step is a system step or custom step.
Multi Account	Displays whether or not the workflow step is Multi-Account capable.
Has Instructions	Displays whether or not the workflow step contains an Instructions tab when configuring it as a part of a workflow. This allows instructions to appear to the end-user when they are running the workflow step.
Has Queuing	Displays whether or not the workflow step contains a Queuing tab when configuring it as a part of a workflow. This allows administrators to assign the workflow to workflow queues.

System Workflow Steps

The following system-defined workflow steps are available to incorporate into workflows:

> Institutions may see workflow steps in addition to the steps listed below. Please review the appropriate connector guide if the workflow step is connector-specific.

Workflow Step	Description	Multi-Account Workflow?	Can be Automated?
Assignment	This step is used to change the assignment of an account. The account can be assigned to any Internal or Third Party queue. This step can also remove all assignments from an account. This step runs automatically and is not presented to users executing the workflow. This workflow step forces the account in the queue and overrides the queuing logic. Queue logic is ignored until the account is removed by the assignment workflow step.	Yes	No

Change Field	This step is used to change a field to a specified value or to change the value of a field by copying a value from another field. This runs automatically and is not presented to users executing the workflow. Only fields with a one-to-one relationship to an account, person or case may be changed. • Specific Value - Provides the ability to change a field to a value specified during configuration. • Value From Other Field - Provides the ability to change a field by copying a source field to a destination field.	Yes	Yes
Charge Off Account	This step is used to approve an account that was recommended and approved for charge off.	No	No
Contact Method	This step is used to record the contact attempts made to the account holder or other liable persons on the account(s) and/or case(s). The results of each contact attempt are recorded. All of the unique phone numbers for the liable persons associated with the accounts and/or case(s) in context for the workflow are displayed in the Contact Method drop-down.	Yes	No
Create Case	This step is used to create a case on a person and account. This workflow step can be configured to be a manual step to allow the user to select the case type or automated so a specific case type is created automatically. This step cannot be run in a Batch workflow. If this step is included in a Batch workflow, the workflow starts but pauses at this step and should be finished manually.	Yes	Yes
Decision	This step runs automatically and is not presented to users executing the workflow. This workflow step is used to present a user with a Yes or No decision. Depending on the answer chosen, users are branched out into a specific path in a workflow. This step can be made automated where system administrators assign business rules to automatically guide a user down a **Yes** or **No** path. With the automated decision step, administrators may also configure the step to include an **Undetermined** decision. When this decision type is configured, users may be required to manually complete the workflow.	Yes	Yes
Distribution	This step is used to distribute accounts over multiple queues. This uses the same concept as the Assignment workflow step to force accounts in the queues and override all queuing logic.	No	No

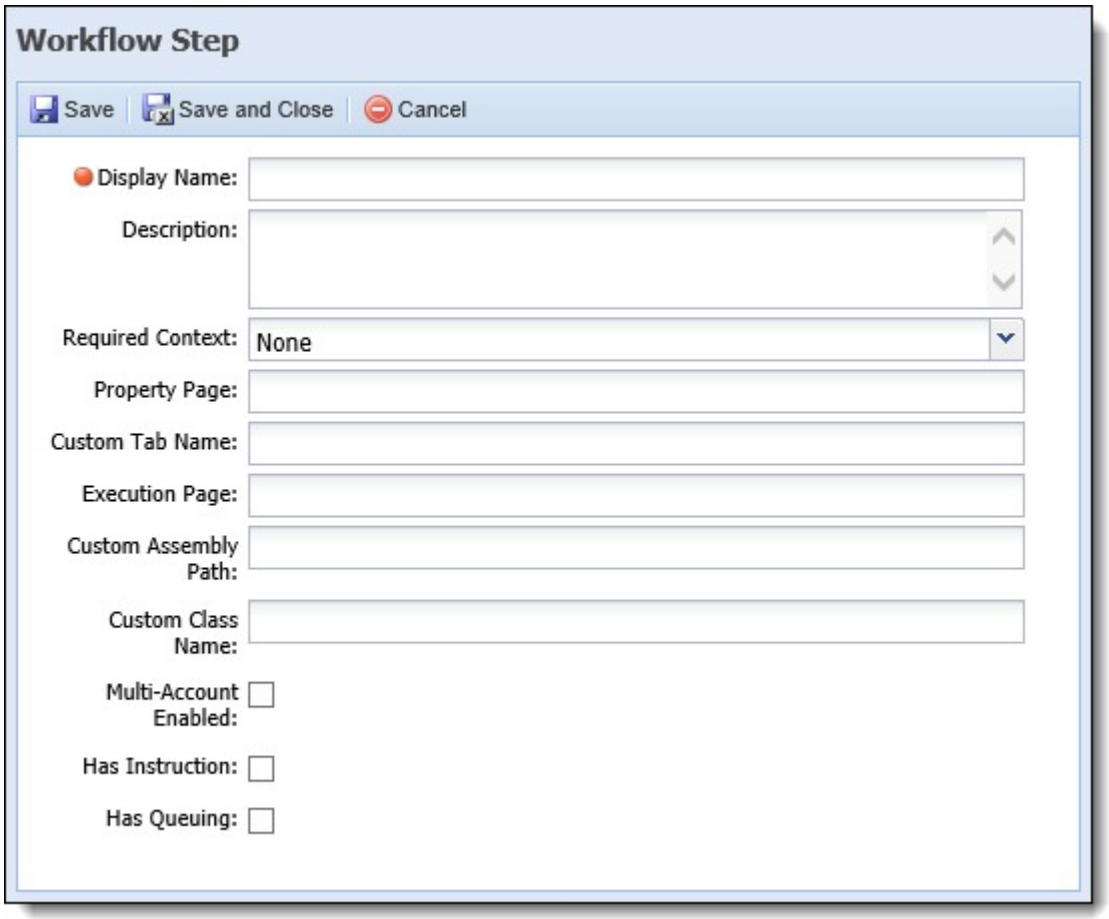
Execute Business Rules	This step runs automatically and is not presented to users executing the workflow. This workflow step is used to execute business rules within a workflow. Workflow rules are configured by system administrators to execute as a workflow. Rules run in order to automatically make a decision based on certain conditions and/or display a message regarding next actions. If an error exists within the rule logic, an error message displays upon execution of this workflow step. If an error message is received while executing this workflow step, please contact your system administrator. This step cannot be included in an Automatic or Batch workflow. If this step is included in an Automatic or Batch workflow, the workflow starts but pauses at this step and should be finished manually.	Yes	No
Income Interruption End Deferment	This step is used to terminate an active deferment by selecting a deferment date from the calendar.	No	No
Income Interruption Review	This step allows users to review requests for Income Interruptions. These requests are found within the file imported from a core system into Temenos Infinity. Based off of Income Interruption rules created within Rules Manager, accounts placed in the review section need to be approved or rejected via this workflow step.	No	No
Manual Payment	This step is used to record a payment on the account in context. If there is a promise on the account, the payment is applied to the promise. This step can be incorporated into a workflow if an institution does not have a payment import. Payments recorded through this step appear on the Payment History screen. Payments are automatically imported from an institution's core system; therefore, this workflow step is not needed for those payments to appear on the Payment History screen.	No	No
Next Contact Date	This step is used to schedule the next contact date for the account(s) in context for the workflow. Optionally, the next contact date may be applied to all of the person's accounts.	Yes	No
Post Comment	This step is used to post a comment on a workflow. This step can be automated using a predefined comment and the workflow step will not be presented to the user.	Yes	Yes
Promise to Pay	This step is used to record a promise to pay on account(s) in context for the workflow.	Yes	No

Reason	This step is used to prompt users to select the account holder's reason for delinquency from a list of available values.	Yes	No
Recommend for Charge Off	This step is used to recommend an account for charge off. This workflow step is only available when the Recovery module is active.	No	Yes
Recommendation Approval	This step is used to approve a recommendation for charge off. This workflow step is only available when the Recovery module is active.	No	Yes
Reverse Charge Off	This step is used to reverse the Charge Off status of an account. Upon successful completion of the step, all related charge off statuses, flags, fields, and transactions are cleared from the account. The account appears in Collection Queues with a classification of "Delinquency" instead of "Charge Off."	No	No
Send Email	This step is used to send an email to the account holder and/or contact related to the account(s) associated with the workflow. This step can be manual by allowing the user to select an email template and recipient. This step can also be automated by using a predetermined email template and recipient list. If the step is automated, it is not presented to the user.	Yes	Yes
Send Letter	This step is used to send one or more letters to the account holder and/or contact related to the account(s) associated with the workflow. Administrators can automate this workflow step to send single letters. If this step is manual, users can pick from a defined list of letter templates.	Yes	Yes
Set GL Amounts	This step is used to allocate money to individual general ledger accounts during the charge off process.	No	Yes
System Integration	This step is a component of the Temenos Infinity API. Customer-built applications can be integrated directly into workflows within the context of Temenos Infinity. Thus, these custom built applications can provide integration with the Host or other systems that Temenos Infinity does not currently integrate with, but also take advantage of the security, process control, and auditing capabilities of Temenos Infinity. Please contact a System Administrator for directions in completing this workflow step.	No	No
Task	This step is used to give a user a set of instructions to perform. This is used to track reasons for delinquency. Those values are configured in System Management > Workflow > Workflow Reason Codes.	Yes	No
View Screen	This step is used to display a screen in a workflow with a set of instructions.	Yes	No

From the Workflow Steps page, administrators can create custom workflow steps, copy existing custom workflow steps, edit existing custom workflow steps, and delete custom workflow steps.

Workflow Attributes

All workflows share common attributes that are defined while creating, copying, or editing a workflow.



The following fields display on the New Workflow Step screen:

Attributes	Description
Display Name	Enter the name as it should appear in the list of available workflow steps. This is a required field.
Description	Enter a description of how the workflow step is used. This is shown in the summary section when selecting which workflow step to add to a workflow.
Required Context	The level in which the workflow step can be run (Account, Case, Both, Calculate, None, Person).
Property Page	If configured, enter the URL of the Property Page. The Property Page appears when configuring a workflow step within a workflow. The URL must begin with "Custom/."
Custom Tab Name	If necessary, define the name of the tab that appears when configuring a workflow step within a workflow. This must be filled out if the Property Page field is filled out.
Execution Page	Enter the URL of the Execution Page. The Execution Page appears when the workflow is run in a workspace. The URL must begin with "Custom/."

Custom Assembly Path	Enter the DLL path used for reflection so an object can be examined and modified at runtime.
Custom Class Name	Enter the class inside of the DLL that is pulled out and used at runtime.
Multi-Account Enabled	If selected, the workflow can be run on Multiple accounts at a time.
Has Queuing	If selected, the new workflow step has the ability to be assigned to a workflow queue.

Creating a Workflow Step

To create a new workflow step:

- Click **Create**.
- The new workflow screen appears. Complete the necessary attributes.
- When finished entering all information, click **Save** or **Save and Close** to save the new workflow step and return to the Workflow Steps page. The new workflow step populates in the Workflow Steps page and is available when building workflows.
- The new workflow step is also available in the **Custom** folder when adding it to a workflow.

Copying a Custom Workflow Step

> System workflow steps cannot be copied.

To copy a workflow step:

- Select a workflow step to highlight it and click **Copy**.
- The Copy Workflow Step Screen appears. Make any necessary changes to the attributes.
- Click **Save** or **SAVE AND CLOSE** to save the workflow step and return to the workflow step page. Click **Cancel** to return to the workflow steps page without saving.
- The new workflow step populates in the workflow steps page.
- The new workflow step is also available in the **Custom** folder when adding steps to a workflow.

Editing a Custom Workflow Step

> System workflow steps cannot be edited.

To modify a workflow step:

- Select a workflow step to highlight it and click **Edit**.
- The Edit Workflow Step screen appears.
- Make any necessary changes to the workflow step.
- Click **Save** or **Save and Close** to save the workflow step and return to the Workflow Step page. Click **Cancel** to return to the Workflow Steps page without saving.

Deleting a Custom Workflow Step

> System workflow steps cannot be deleted.

To delete a workflow step:

- Select a workflow step to highlight it and click **Delete.**
- A confirmation message appears.
- Click **Yes** to delete the workflow step. Click **No** to return to the workflow steps page without deleting the workflow step.

Automated Decision Workflow Step

In order to assign and author rules for the Automated Decision Workflow Step, the ability to author Business Rules must be enabled for your institution. For more information about how to enable this functionality, please contact your Temenos Customer Care Representative.

The Automated Decision Workflow Step provides administrators with the ability to assign business rules to automatically determine a Yes, No, or Undetermined decision based on certain conditions being met. The user will automatically be placed in the next step down the Yes or No workflow path. If an Undetermined decision is reached, business rules can be used to display a message to users with instructions on how to proceed with the workflow's completion.

By configuring a workflow to include an automated workflow step, administrators can eliminate the need for users to manually complete the decision step, increasing the time spent on collection efforts and improving efficiency and productivity in Temenos Infinity.

Workflow Step Configuration

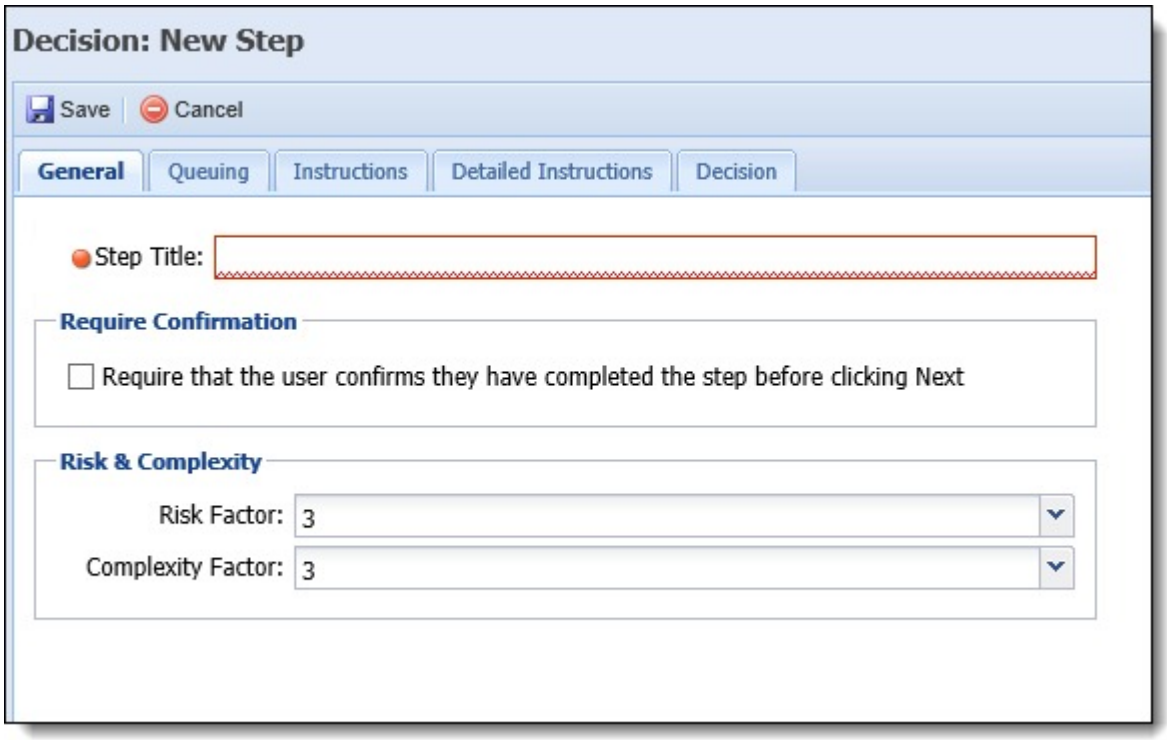
To configure a workflow to include the Automated Decision workflow step, include it in the Design attribute while creating or editing a workflow.

The Automated Decision workflow step cannot be configured for Batch or Automated workflows.

On the **Design** tab, in the Workflow Configuration window right-click on a step within the workflow design and select **New Step Before** or **New Step After**.

The **Select a Workflow Step** screen displays. Highlight the **Decision** workflow step and click **Select Step**.

The **Step Properties** window opens to configure the workflow step:



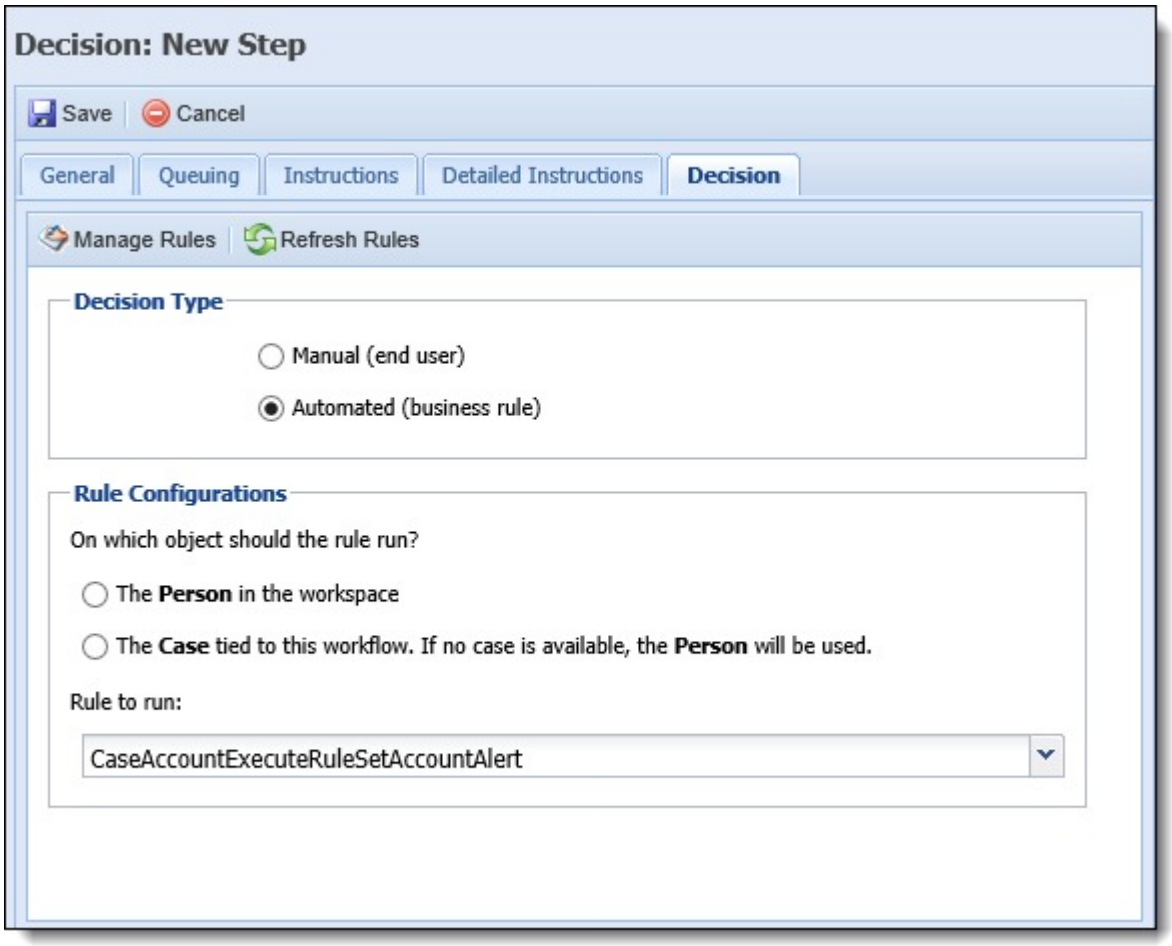
> The General, Queuing, and Instructions attributes for the Automated Decision workflow step are completed in the same manner as other workflow steps. For information regarding the completion of these attributes, please see the Workflow Steps section of this guide.

To assign rules to execute for this workflow step, navigate to the **Decision** Tab.

> By default, **Manual** is selected upon opening this tab.

In order to assign a Workflow rule to execute for this workflow step, **Automated** must be selected. Upon selecting Automated, the Rule Configurations section dynamically appears in the Decision pop-up window.

> If the ability to author Business Rules is not enabled and/or Workflow rules have not been defined, Automated Decision is disabled and cannot be selected.



Within the Rule Configurations section, the following parameters appear:

Parameter	Description
On Which Object Should the Rule Run	This parameter allows institutions to identify whether Case or Person objects are sent to rules in the Decision workflow step. If Case is selected, and the workflow does not include a Case, the Person objects are used.
Rule to Run	Use the drop-down list to select the rule to execute for the workflow step.

Rule Configuration

To create a new rule for this workflow step or update an existing Workflow rule, click **Manage Rules**.

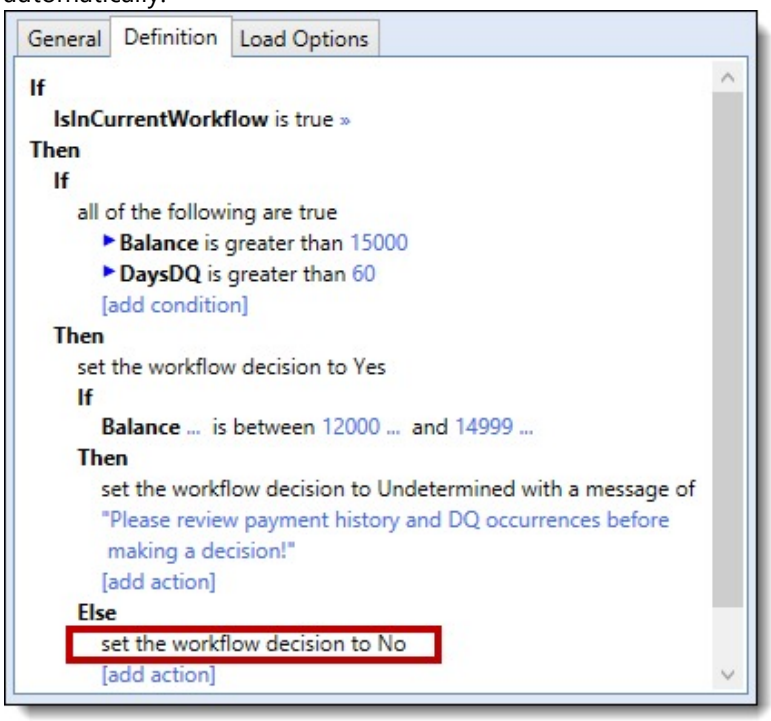
Rules Manager opens with the **Workflow** category pre-selected.

Click **Create** and select **Business Rule** to create a new Workflow rule or select a rule within the rules grid and click **Edit** to configure an existing Workflow rule for this workflow step.

Rule logic for the Automated Decision Workflow Step is defined within the Definition tab of the Edit Rule window.

Use the following table to assist with configuring business rules to execute within the Automated Decision Workflow Step:

Action Template	What it Does	Category Selection
set the workflow decision to yes	Sets workflow decision to yes to take user down the yes path automatically. General Definition Load Options If IsInCurrentWorkflow is true » Then If all of the following are true Balance is greater than 15000 DaysDQ is greater than 60 [add condition] Then set the workflow decision to Yes [add action]	Workflow
set the workflow decision to undetermined	Sets workflow decision to undetermined and presents a message to the user to manually answer yes/no. General Definition Load Options If IsInCurrentWorkflow is true » Then If all of the following are true Balance is greater than 15000 DaysDQ is greater than 60 [add condition] Then set the workflow decision to Yes If Balance ... is between 12000 ... and 14999 ... Then set the workflow decision to Undetermined with a message of "Please review payment history and DQ occurrences before making a decision!"	Workflow

set the workflow decision to no	Sets workflow decision to no to take user down the no path automatically.  	Workflow

When writing a rule to be used in an Automated Decision workflow step, the only action that can be defined is setting the decision value using the action templates shown in the above table. Other actions, such as setting the value of a field, cannot be included in that same rule. To define an action to occur as a result of the workflow decision, write a separate rule to include that action in an execute business rules workflow step within the workflow.

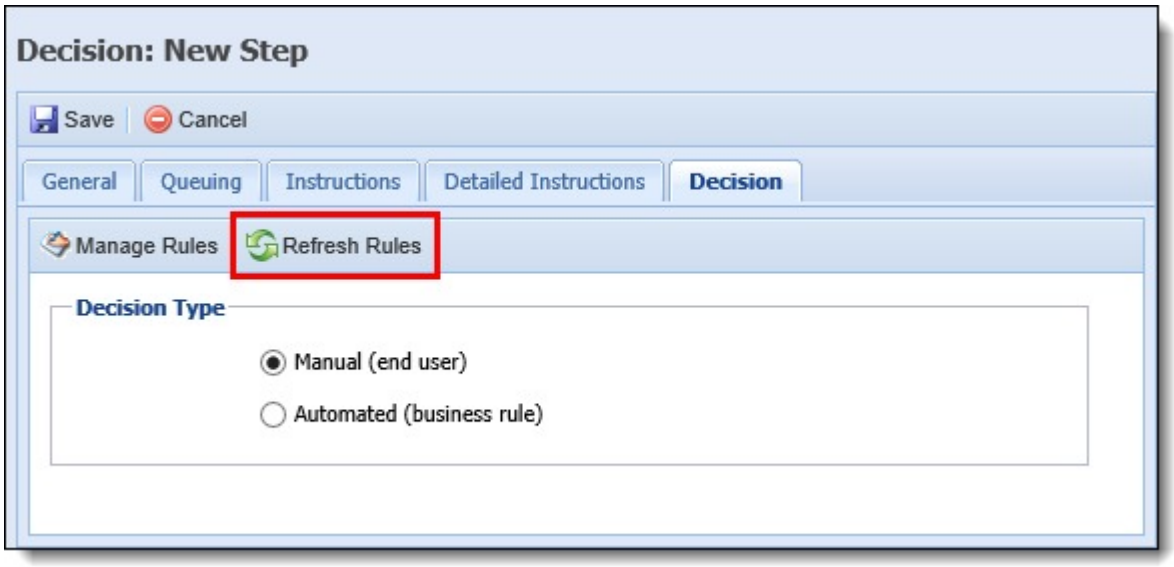
In order to produce the desired results, select the appropriate entity when authoring a rule. When this workflow step is to be run in a multi-account workflow, Root.Person is the recommended rule entity for the workflow rule, providing the ability to configure the rule logic to include account level fields and execute the rule one time to determine a decision. Selecting an entity such as Person.Accounts executes the rule one time for each account and could return multiple decisions. For more information regarding entities, click here.

For any workflow decision, make sure that the account or case being evaluated is included in the workflow by defining the condition **IsInCurrentWorkflow is true** to appear in the workflow rule.

Once all tabs for the rule are complete, click **Save** within the Edit Rule window to save the rule. Select **Save and Close** to save the rule and return to the Rules Management Application screen. Click **Cancel** to return to the Rules Management Application screen without saving.

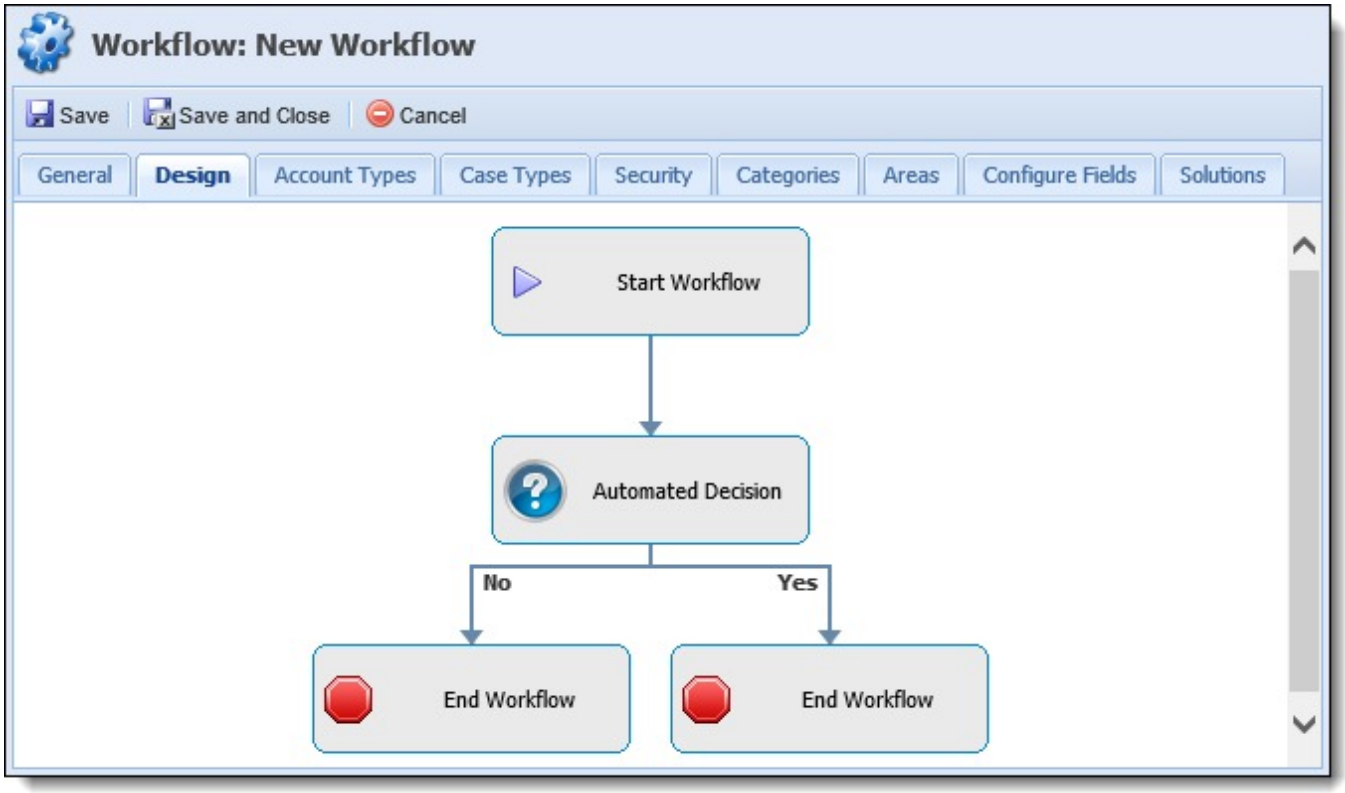
Save must also be selected on the Rules Management Application screen once all changes to rule logic are complete. Clicking Save within the individual rule does not save rule logic to the Rule Application without this final save.

Click the to exit Rules Manager and return to the Workflow Step Properties window. After the new or edited rule logic has been saved, select **Refresh Rules** to display the rule within the Automated Decision drop-down and add it to the workflow step.



Once the rule to be executed is identified within the drop-down, click Save within the Step Properties window to save the workflow step and return the workflow configuration window.

Continue configuring workflow steps for the decision path of the workflow and complete the remaining workflow attributes before saving the workflow and returning to the Workflow Management screen.



The Rules assigned to this workflow now executes when the Automated Decision workflow step is run in the workflow.

For more information on workflow configuration, please see the Workflows topic within this Guide.

Change Field Workflow Step

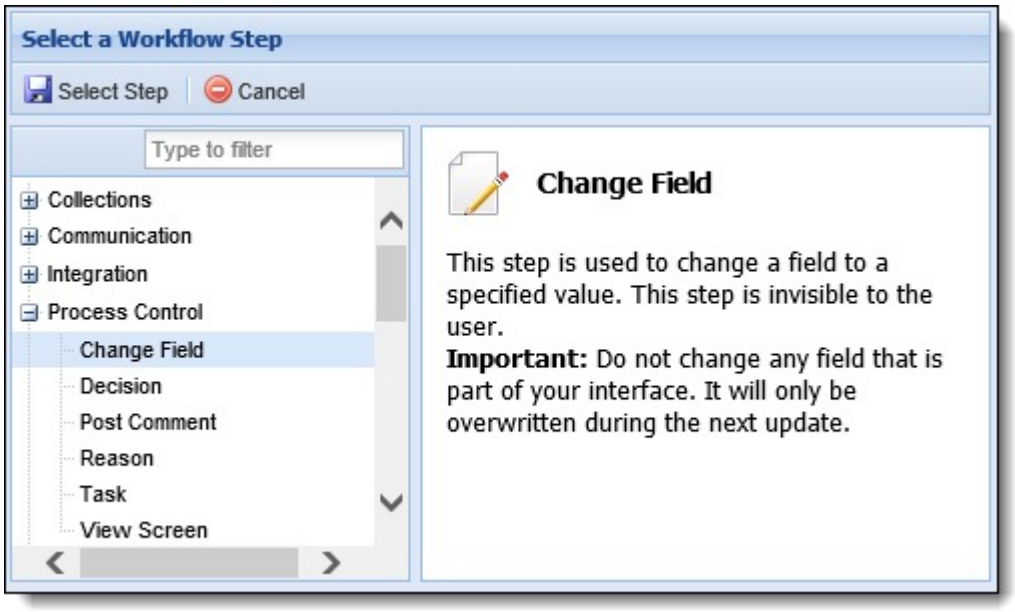
The Change Field workflow step provides the ability to automatically modify the value of a field to a pre-determined value, or to the value of another field, during execution of the workflow step. This workflow step is automated and is not presented to end users executing the workflow.

> The Change Field workflow step can be used in automated, batch, and manual workflows.

Workflow Step Configuration

The Change Field workflow step is configured to appear in a workflow from the Workflows page in System Management (System Management > Workflow > Workflows).

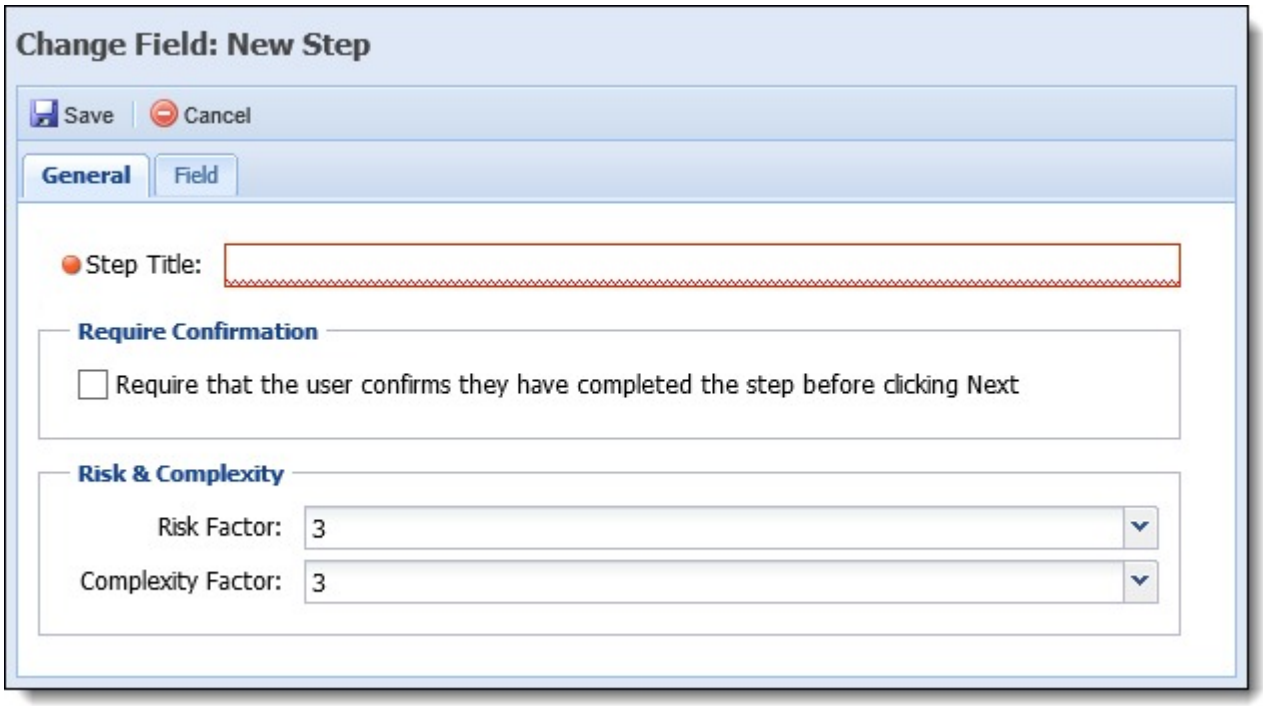
> Similar to other workflow steps, the Change Field step is added to a workflow from the the Design tab in the Workflow Configuration window. For information on this tab and how to configure a workflow, please see the Workflows topic in this guide.



Step Properties

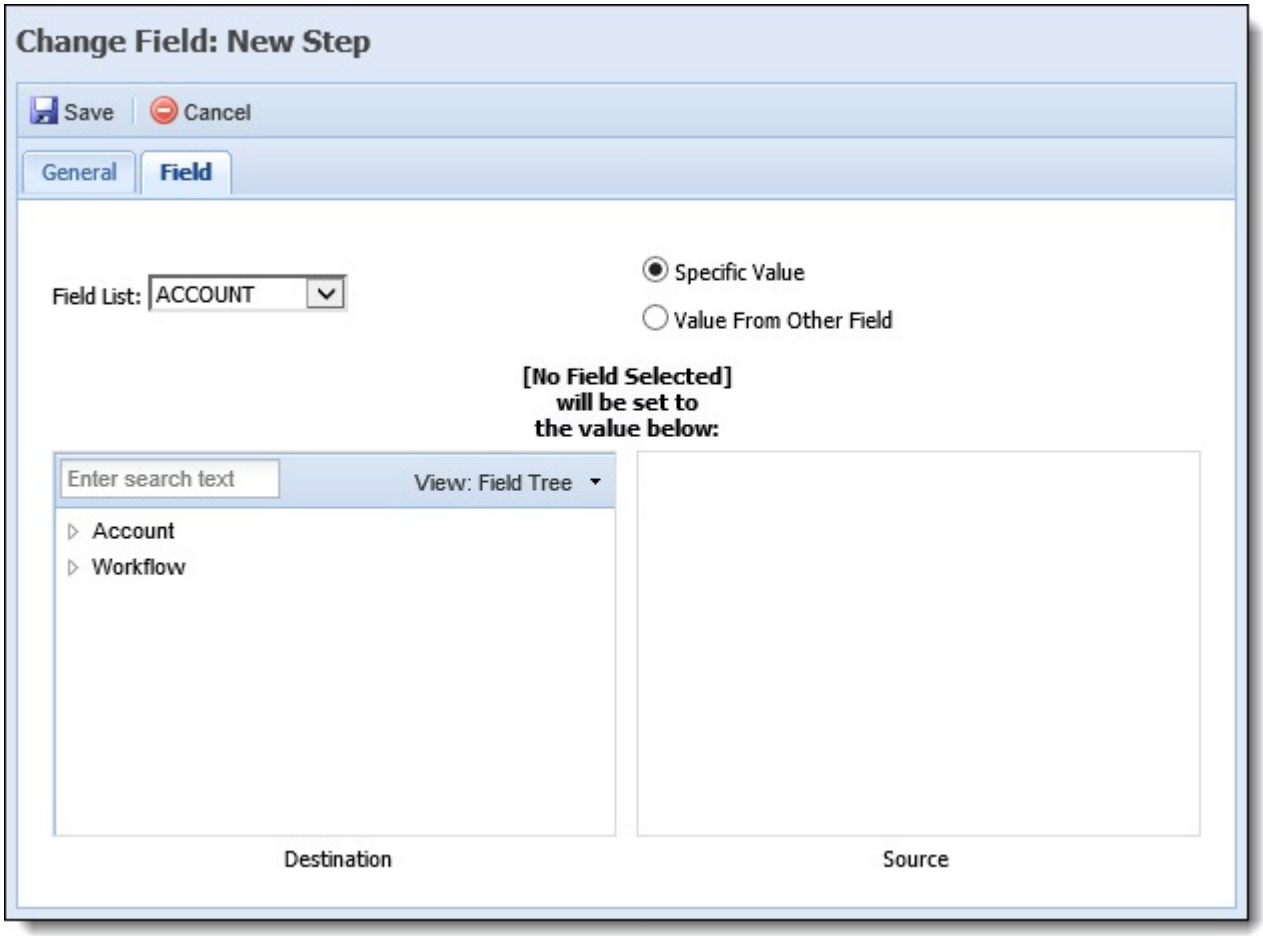
Once the Change Field step is selected, a window appears to configure the step properties.

> The General tab for the Change Field workflow step is completed in the same manner as other workflow steps. For information regarding the completion of this tab, please see the Configuring Workflow Steps section in the Workflows topic.



Field

From the Field tab, administrators are able to determine the field to be updated during workflow step execution as well as define the new value to populate for the field.



The Field List drop-down provides the ability to determine whether Account, Case, or Person fields are available to select from in the Destination box at the bottom of the tab. For example, when Account is selected, Account level fields populate within the Field Tree in the Destination box.

Once a Field List is determined, navigate to the Destination box and select the field to be updated with the Change Field workflow step.

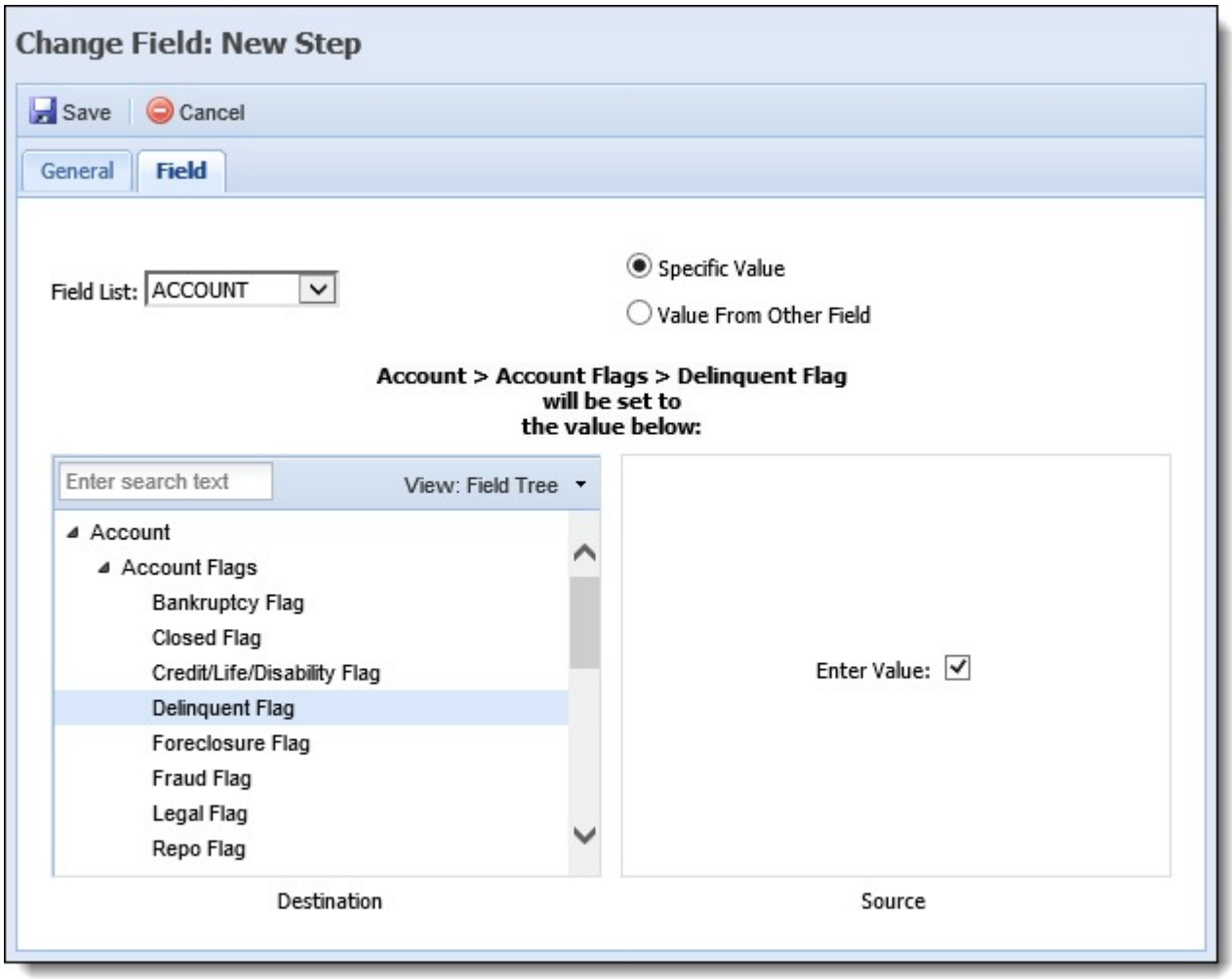
> Only fields with a one-to-one relationship to an account, person or case may be changed.

After selecting the destination field, determine the source of the new value by using the radio buttons next to the Field List. The source value options are as follows:

- Select **Specific Value** to set the destination field to a specific value. When this option is selected, a text box populates in the Source box to enter the desired value for the destination field.
- Select **Value From Other Field** to set the destination field to a specific value. When this option is selected, a Field List populates in the Source box to select the field that is providing the value for the destination field.

Once a source value option is selected, enter or select the new value for the destination field within the Source box.

When both the destination and source values are identified, the message in the middle of the tab displays the field path of the destination field and source value to be set with the workflow step. For example, when the Change Field workflow step is configured to update the value of the Delinquent Flag to true, the message in the tab appears as shown below:



Execute Business Rules Workflow Step

In order to assign and author rules for the Execute Business Rules Workflow Step, the ability to author Business Rules must be enabled for your institution. For more information about how to enable this functionality, please contact your Temenos Customer Care Representative.

The Execute Business Rules Workflow Step allows for multiple business rules to be executed as part of a workflow. A workflow can be configured to include the Execute Business Rules workflow step in order to display a rules generated warning, error, or information message to the user executing the workflow. Rules can also automatically change the value of a field, such as **Next Contact Date**, based on conditions being met.

Configuring a workflow to include this workflow step provides administrators with the ability to save time and increase collection efforts by automatically displaying important information and/or instructions to the user regarding the person/account associated with the workflow and eliminating the need for users to manually change or update information as a result of the workflow.

Workflow Step Configuration

To configure a workflow to include the Execute Business Rules workflow step, include it in the Design attribute while creating or editing a workflow.

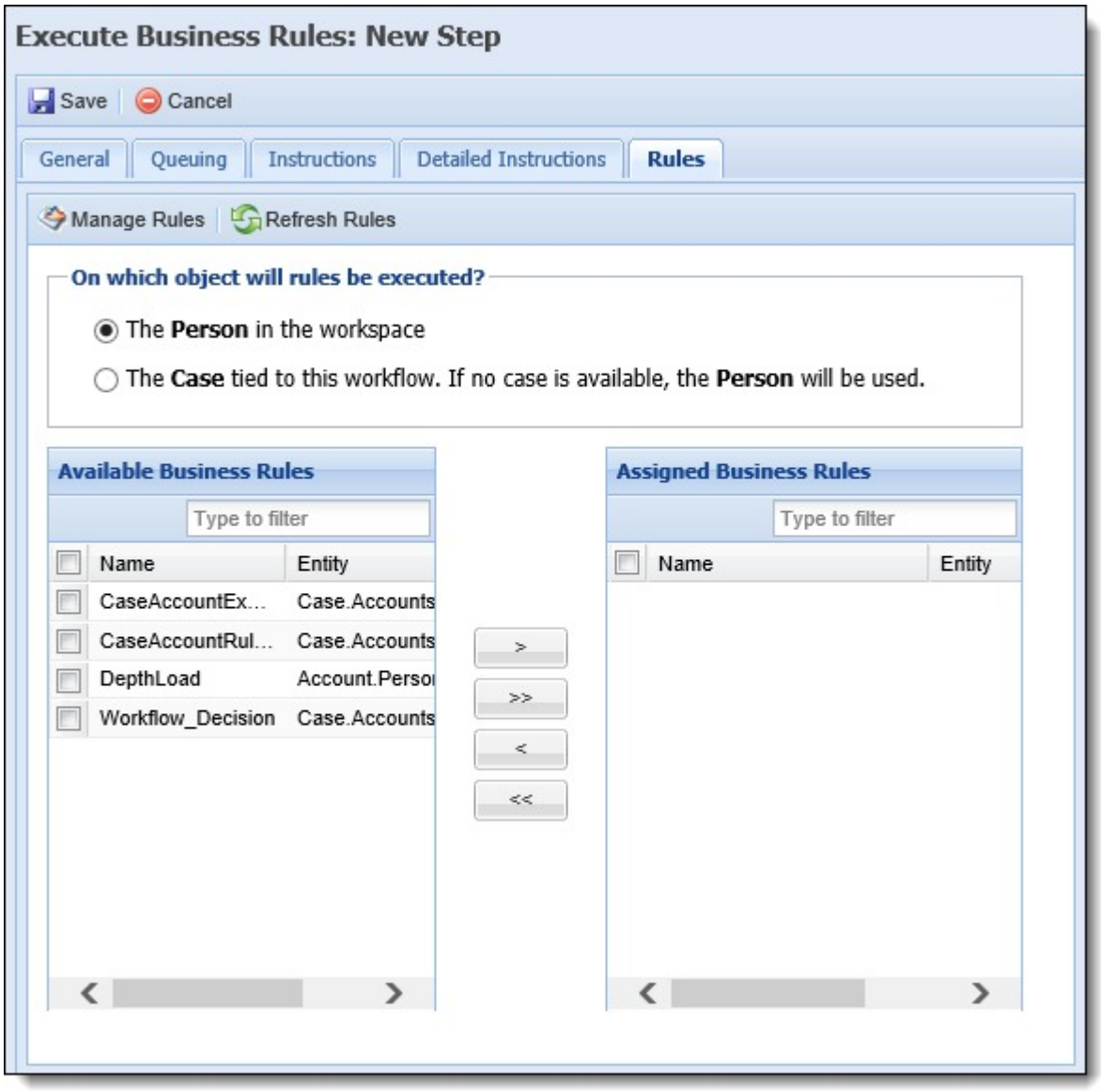
Right-click on a step within the workflow design and select **New Step Before** or **New Step After**.

The Select a Workflow Step screen displays. Highlight the Execute Business Rules step, and click **Select Step**.

The Step Properties window opens to configure the workflow step.

The General, Queuing and Instructions attributes for the Execute Business Rules workflow step are completed in the same manner as other workflow steps. See Workflows Steps for information regarding the completion of these tabs.

To assign rules to execute for this workflow step, navigate to the Rules tab.



Within the Rules tab, administrators are able to use the On Which Object Will Rules Be Executed parameter to identify whether Case or Person objects are sent to rules in the Execute Business Rule workflow step.

> If Case is selected, and the workflow does not include a Case, the Person objects are used.

Additionally, the Available Business Rules box lists the rules available to be assigned to this workflow step. These are the Workflow rules defined in System Management > Collections > Rules Management. The rules identified within the Assigned Business Rules box execute when the workflow step is run in the workflow.

Select a rule from the Available Business Rules box and move it to the Assigned Rules box using the arrows on the screen.

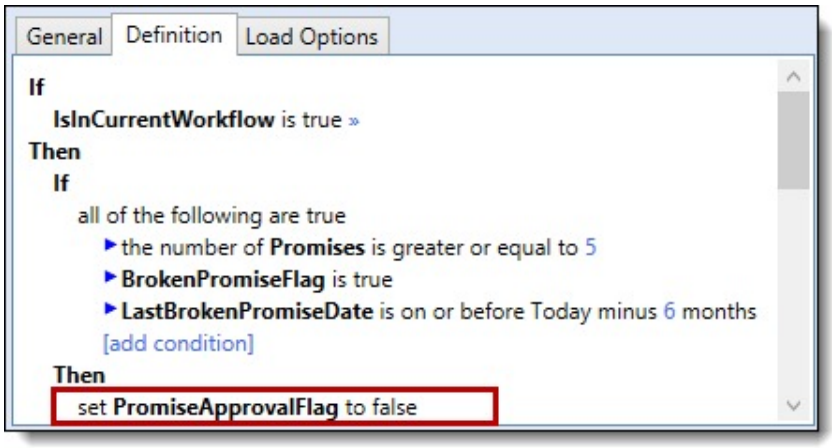
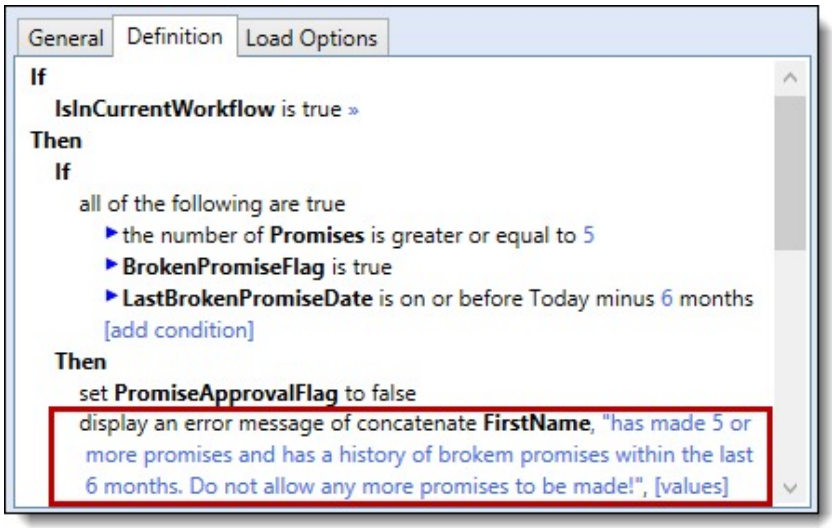
Rule Configuration

To create a new rule for this workflow step or update an existing rule, click

. Rules Manager opens with the **Workflow** category pre-selected. Click Create, and select **Business Rule** to create a new Workflow rule, or select a rule within the rules grid to configure it for this workflow step.

Rule logic for the Execute Business Rules Workflow Step is defined within the Definition tab of the Edit Rule window. Use the following table to assist with configuring business rules to execute within the Execute Business

Rules Workflow Step:

Action Template	What it Does	Category Selection
set the value of a field	Sets the value of a field (can use all math operations, concatenations etc.).  	Workflow
display an error message	Displays an error message and prevents the user from completing the workflow.  	Workflow

display a warning message	Displays a warning message to the user executing the workflow. General | Definition | Load Options **If** **IsInCurrentWorkflow** ^ is true » **Then** **If** all of the following are true ▸ the number of **Promises** is greater or equal to 5 ▸ **BrokenPromiseFlag** is true ▸ **LastBrokenPromiseDate** is on or before Today minus 6 months [add condition] **Then** set **PromiseApprovalFlag** to false display an error message of concatenate **FirstName**, "has made 5 or more promises and has a history of brokem promises within the last 6 months. Do not allow any more promises to be made!", [values] **If** the number of **Promises** is between 1 and 4 » and **BrokenPromiseFlag** is true » **Then** set **PromiseApprovalFlag** to true display a warning message of concatenate **FirstName**, "has a history of broken promises! Make sure to accept a reasonable promise amount!", [values]	Workflow

display an information message	Displays an information message to the user executing the workflow. General | Definition | Load Options **If** **IsInCurrentWorkflow** is true » **Then** **If** all of the following are true ▸ the number of **Promises** is greater or equal to 5 ▸ **BrokenPromiseFlag** is true ▸ **LastBrokenPromiseDate** is on or before Today minus 6 months [add condition] **Then** set **PromiseApprovalFlag** to false display an error message of concatenate **FirstName**, "has made 5 or more promises and has a history of brokem promises within the last 6 months. Do not allow any more promises to be made!", [values] **If** the number of **Promises** is between 1 and 4 » and **BrokenPromiseFlag** is true » **Then** set **PromiseApprovalFlag** to true display a warning message of concatenate **FirstName**, "has a history of broken promises! Make sure to accept a reasonable promise amount!", [values] **If** the number of **Promises** is greater or equal to 1 » and **BrokenPromiseFlag** is false » **Then** set **PromiseApprovalFlag** to true display an information message of concatenate **FirstName**, "has never broken a promise! Please schedule a promise to pay!", [values]	Workflow

In order to produce the desired results, select the appropriate entity when authoring a rule. The Entities **Root.Person** and **Person.Accounts** are recommended rule entities for this workflow step, but do not reflect the only entity choices that can be selected. The example above was written under the Person.Accounts entity to execute the rule one time for each account associated with the workflow. For further information about this concept, see the Getting Started with Rules Management topic in this guide.

For any workflow decision, make sure that the account or case being evaluated is included in the workflow by defining the condition **IsInCurrentWorkflow is true** to appear in the workflow rule.

Once all tabs for the rule are complete, click Save and Close to create the rule, and return to the Rules Management Application screen.

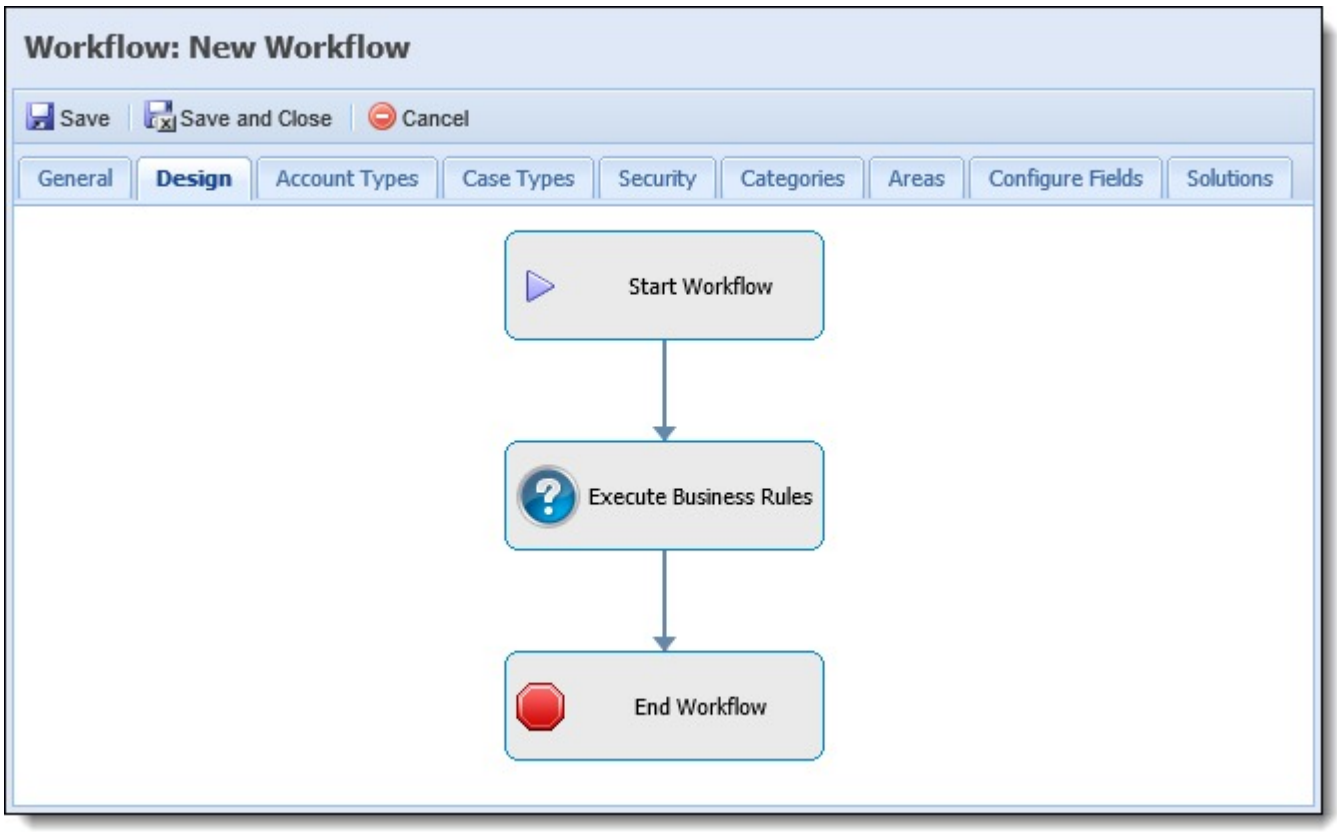
Save must also be selected on the Rules Management Application screen once all changes to rule logic are complete. Clicking Save within the individual rule does not save rule logic to the Rule Application without this final save.

After the new or edited rule logic has been saved, click Refresh Rules within the step properties window to

display the rule within the Available Business Rules box, and add it to the workflow step. Move any new or edited rules to the Assigned Business Rules box using the arrows on the screen.

Once all desired rules appear within the Assigned Business Rules box, click Save to create the workflow step.

Continue configuring workflow steps to appear in workflow and complete the remaining workflow tabs before saving the workflow and returning to the Workflow Management screen.



The Rules assigned to this workflow now execute when the Execute Business Rules workflow step is run in the workflow.

> For more information on workflow configuration, please see the Workflows topic in this guide. For more information on authoring rules, please see the Rules Management topic.

Income Interruption End Deferment Workflow Step

The Income Interruption End Deferment workflow step can be run in a workflow to terminate an active deferment.

> An income interruption can be ended individually with this workflow step as well as for an entire event through the End Event Deferments page in System Management.

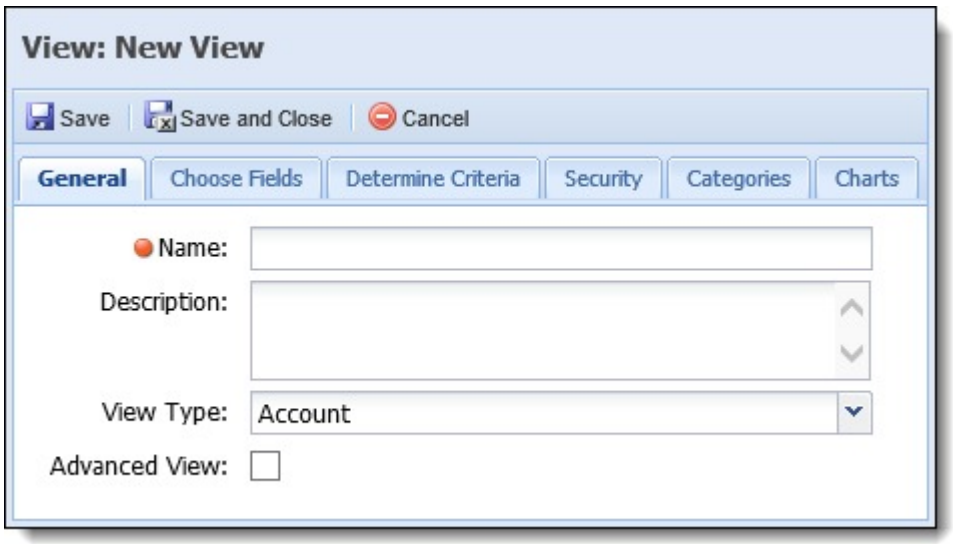
In order to provide access to Active Income Interruption requests, system administrators must first configure a View to list the accounts in Income Interruption.

View Configuration

To configure a view displaying Active Income Interruption accounts, select the **Views** icon within the Ribbon Bar to open the Views page.

Click **Create**.

The View Configuration window appears.



> The General, Determine Criteria, Security, Categories and Charts tabs are completed in the same manner as other views. See Views regarding information the completion of these tabs.

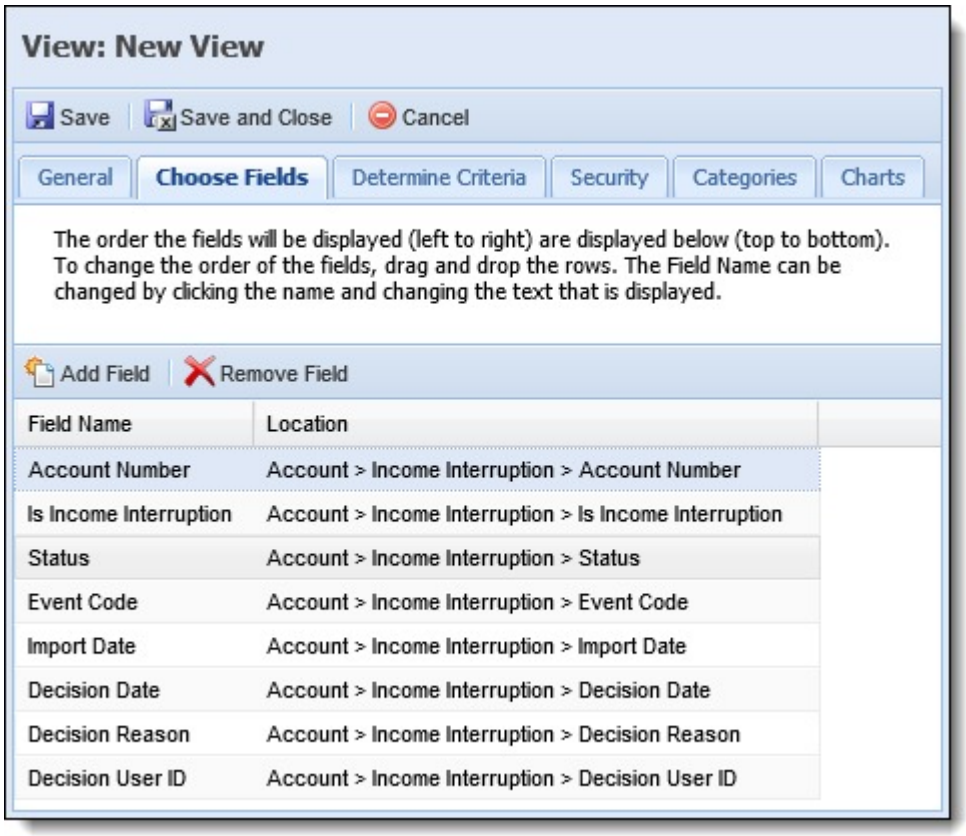
The fields that populate within this view are defined on the **Choose Fields** tab. Select **Add Field** to begin adding fields to the view.

A **Field Selector** pop-up appears. To easily locate Income Interruption fields, enter **Income Interruption** within the filter. All fields related to Income Interruption are displayed.

> See a complete list Income Interruption fields that can be added to a workflow.

Add fields to the view by double-clicking on the Field Name or highlighting a Field and selecting Add Field. Click **Close** once all fields are added.

The fields populate within the Choose Fields tab with the Field Name and Location listed:



Upon completing all configurations for the view, click **Save** to retain the view settings. Click **Save and Close** to retain the view settings and return to the Views page. Select **Cancel** to return to the Views page without saving.

The view can now be run from the Ribbon Bar to access active Income Interruption accounts. Double-clicking on an account within the view provides direct access to a workspace for the person related to the account in order to execute the Income Interruption workflow.

Workflow Configuration

To configure a workflow to include the Income Interruption End Deferment workflow step, navigate to System Management > Workflow > **Workflows**. Click **Create**.

> See more information on how to create a new workflow.

The Workflow Configuration window appears. The Income Interruption End Deferment workflow step is added on the **Design** tab. Click on **Start Workflow** within the workflow design and select **New Step After**.

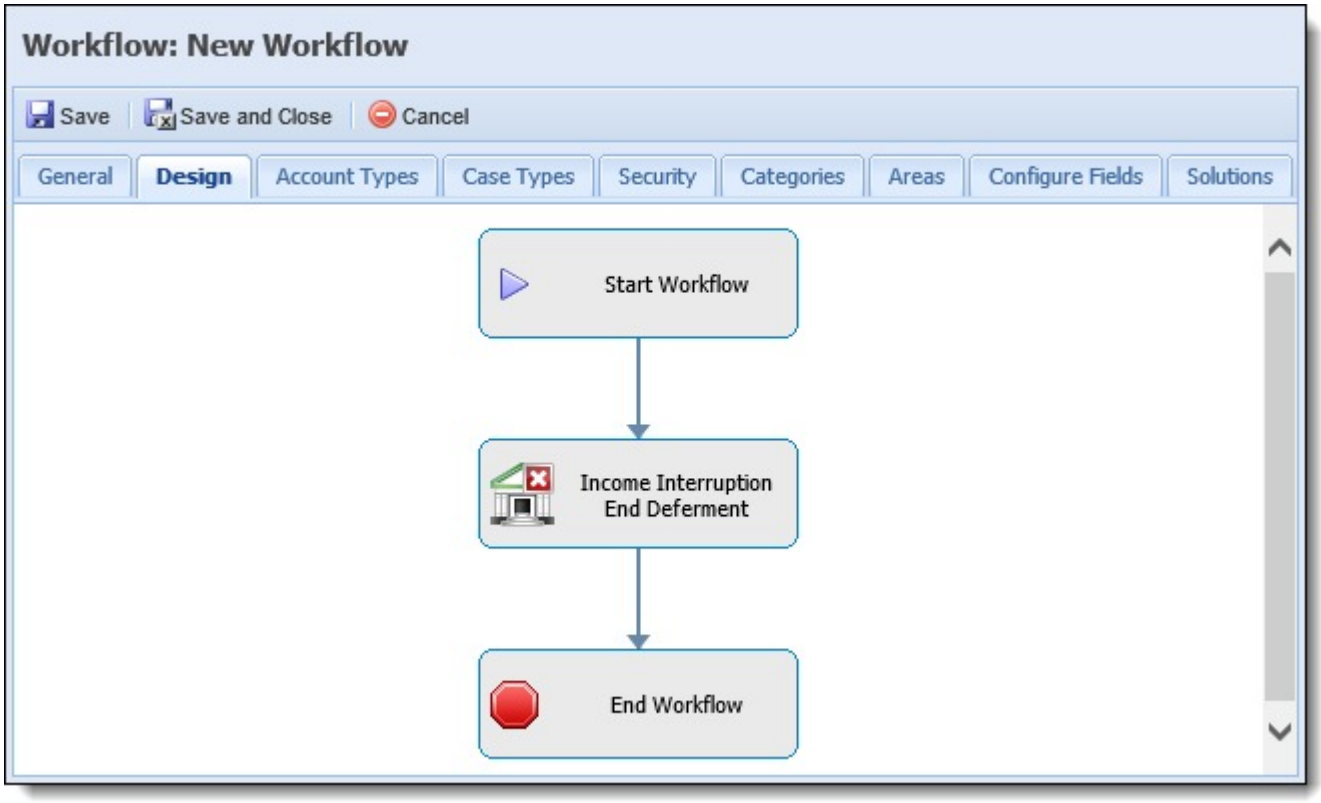
The **Select a Workflow Step** pop-up displays. Highlight the **Income Interruption End Deferment** step and click **Select Step**.

The **Step Properties** window opens to configure the workflow step.

Complete the **General**, **Queuing** and **Instructions** tabs for the Income Interruption End Deferment workflow step in the same manner as other workflow steps. See Workflows Steps for information regarding the completion of these tabs.

Once all information for this workflow step has been added, click Save to retain the workflow step settings.

Continue configuring workflow steps to appear in the workflow and complete the remaining workflow tabs before saving the workflow and returning to the Workflow Management screen.



Upon saving the workflow, the Income Interruption End Deferment workflow step can be run in the workflow to

terminate an active deferment.

For an overview of the Income Interruption process and information regarding rule configuration, please see the Income Interruption topic within this Guide.

See more information about the workflow step in order to execute the step within the workspace.

Income Interruption Review Workflow Step

When configuring business rules for the Income Interruption process, system administrators can define eligibility conditions that do not meet the requirements for automatic approval or declination, requiring a manager to review the request and manually determine a decision. If Manager Review is required, the Income Interruption Review workflow step can be run in the workspace to approve or deny an Income Interruption request.

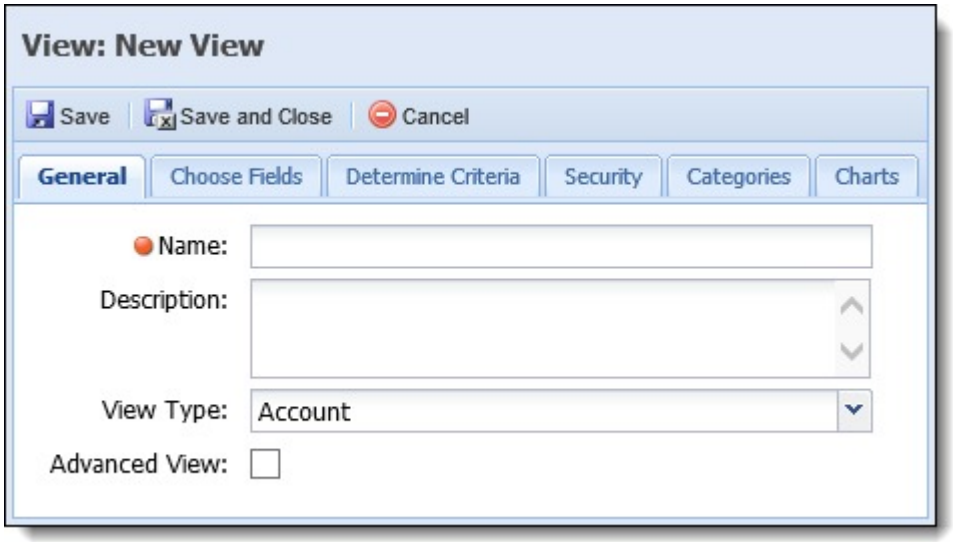
In order to provide access to Income Interruption requests in need of manager review, system administrators must first configure a view to list the results of the Income Interruption Import.

View Configuration

To configure a view displaying Income Interruption requests, select the Views icon within the Ribbon Bar to open the Views page.

Select **Create**.

The View Configuration window appears:



> The General, Determine Criteria, Security, Categories, and Charts tabs are completed in the same manner as other views. See Views for more information regarding the completion of these tabs.

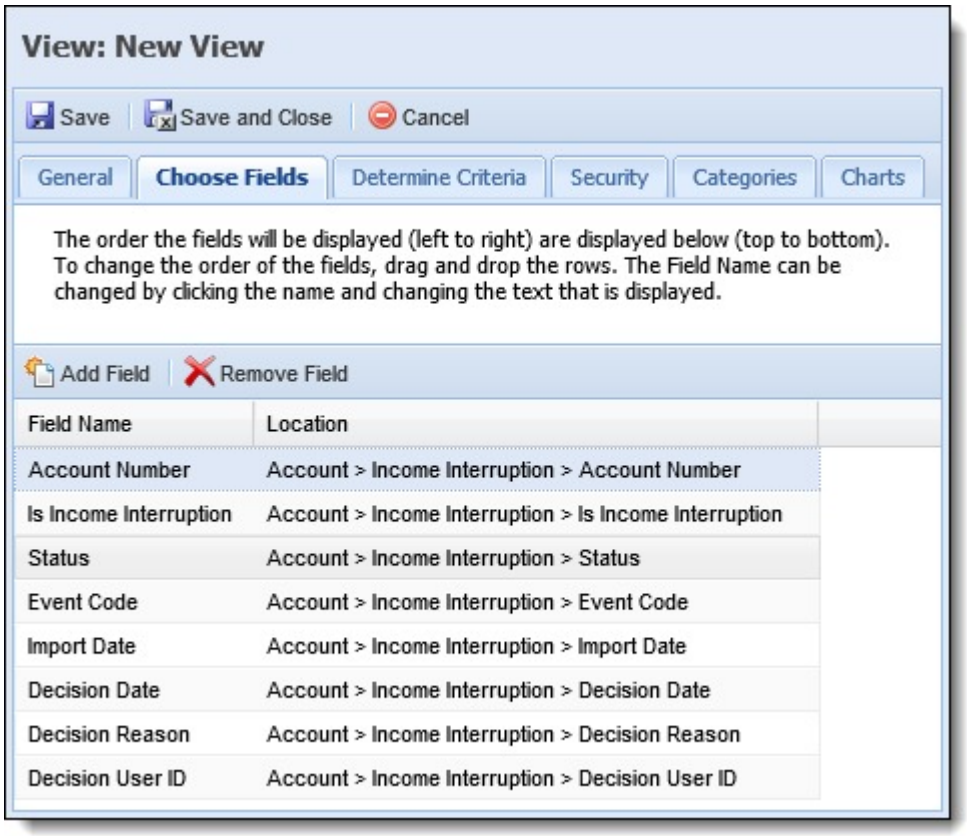
The fields that populate within this view are defined on the **Choose Fields** tab. Select **Add Field** to begin adding fields to the view.

A **Field Selector** pop-up appears. To easily locate Income Interruption fields, enter **Income Interruption** within the filter. All fields related to Income Interruption are displayed:

> See a complete list of available Income Interruption fields to add to the Income Interruption Review Workflow step.

Add fields to the view by double-clicking on the Field Name or highlighting a Field and selecting Add Field. Click **Close** once all fields are added.

The fields populate within the Choose Fields tab with the Field Name and Location listed:



Upon completing all configurations for the View, click **Save** to retain the view settings. Click **Save and Close** to retain the view settings and return to the Views page. Select **Cancel** to return to the Views page without saving.

The view can now be run from the Ribbon Bar to access active Income Interruption accounts. Double-clicking on an account within the view provides direct access to a workspace for the person related to the account in order to execute the Income Interruption workflow.

Workflow Configuration

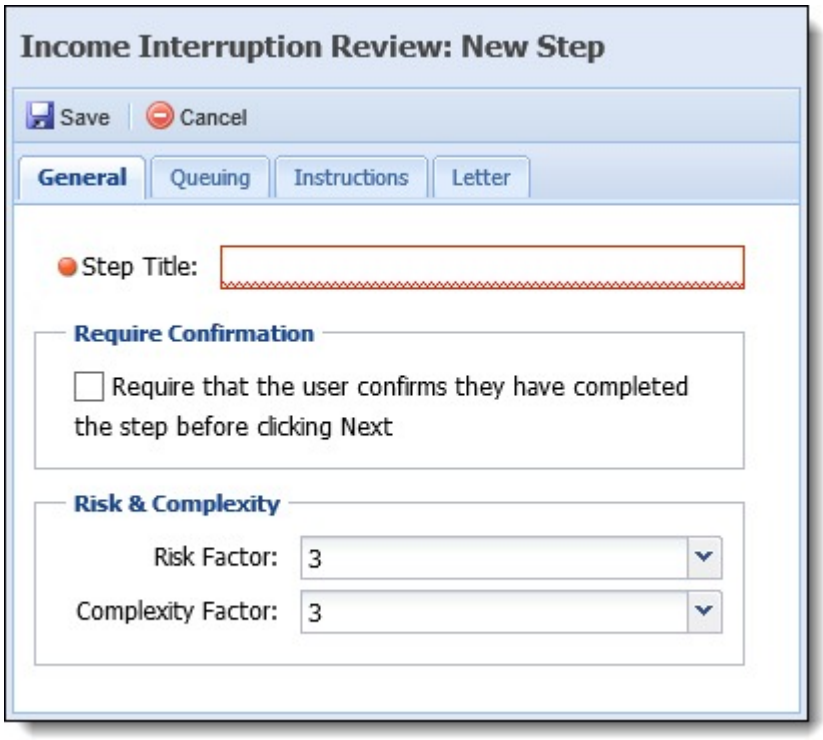
To configure a workflow to include the Income Interruption End Deferment workflow step, navigate to System Management > Workflow > **Workflows**. Click **Create**.

> See more information on how to create a new workflow.

The Workflow Configuration appears. The Income Interruption Review workflow step is added on the **Design** tab. Click on a step within the workflow design and select **New Step After**.

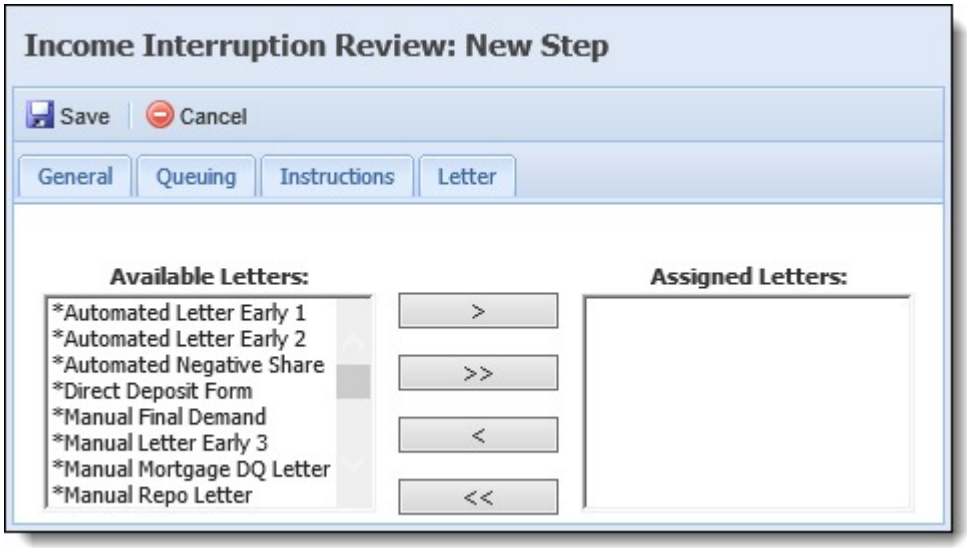
The **Select a Workflow Step** pop-up displays. Highlight the **Income Interruption Review** step and click **Select Step**.

The **Step Properties** window opens to configure the workflow step.



The **General**, **Queuing**, and **Instructions** tabs for the Income Interruption Review workflow step are completed in the same manner as other workflow steps. See Workflows Steps for information regarding the completion of these tabs.

To assign the letter(s) to be sent to the account holder upon manual approval or decline of an Income Interruption request, navigate to the **Letter** tab. On this tab, two boxes display: Available Letters and Assigned Letters.



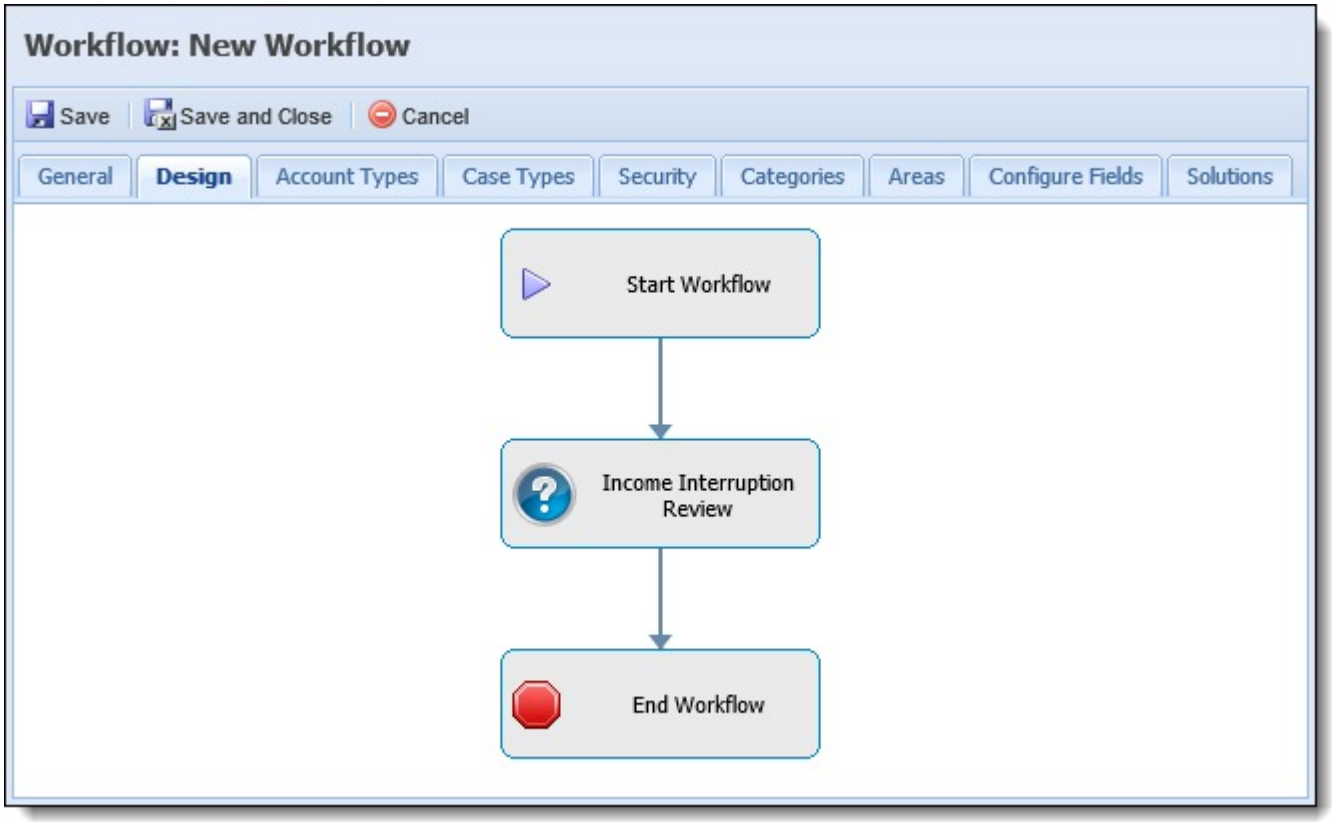
The **Available Letters** box lists the letters configured by system administrators in System Management > Communication > **Letters & Forms**. The letter(s) within the **Assigned Letters** box populate for selection within the Income Interruption Review workflow step.

> After execution of the Income Interruption Export, the letter selected within the Income Interruption Review workflow step is generated and sent to **Batch Letter Printing.** For more information on how to configure a letter for this workflow step, please see the Letters and Forms topic within this Guide. See more information about Batch Letter Printing in order to properly configure a letter.

Select a letter from the Available Letters box and move it to the Assigned Rules box using the arrows on the screen.

Once all desired letters appear within the Assigned Letters box, click Save to retain the workflow step settings.

Continue configuring workflow steps to appear in the workflow and complete the remaining workflow tabs before saving the workflow and returning to the Workflow Management screen.



Upon saving the workflow, the Income Interruption Review workflow step can be run to manually approve or decline an Income Interruption request in need of Manager Review.

For an overview of the Income Interruption process and information regarding rule configuration, please see the Income Interruption Overview topic within this Guide.

For more information regarding how this workflow step is executed in the workspace, please see workflow topic within this Guide.

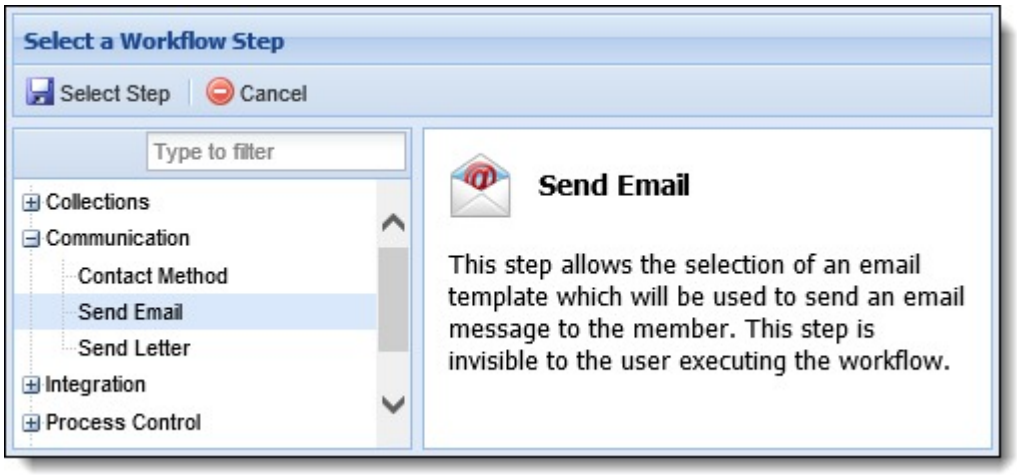
Send Email Workflow Step

The Send Email workflow step enables the ability to quickly and easily send an email to account holders to provide them with information regarding their account or case, such as a delinquency or repossession notice. By configuring a workflow to include this step, administrators are able to define which email is generated with the workflow step as well as determine whether an email is automatically generated during execution of the workflow step or if users have the ability to manually select the email to be sent.

Workflow Step Configuration

The Send Email workflow step is configured to appear in a workflow from the Workflows page in System Management (System Management > Workflow > Workflows).

Similar to other workflow steps, the Send Email step is added to a workflow from the Design tab in the Workflow Configuration window. For information on this tab and how to configure a workflow, please see the Workflows topic in this guide.



Step Properties

Once the Send Email step is selected, a window appears to configure the step properties.

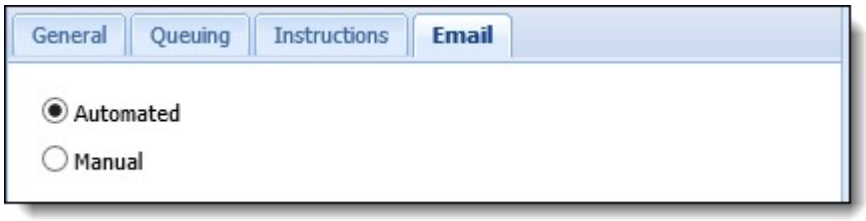
The General, Queuing and Instructions tabs for the Send Email workflow step are completed in the same manner as other workflow steps. For information regarding the completion of these tabs, please see the Configuring Workflow Steps section in the Workflows topic.

Email Tab

Within the Email tab, administrators are able to determine the execution method for the Send Email step as well as assign one or more emails(s) to be sent during execution of the workflow step.

The radio buttons that appear in the top of the tab determine how emails are generated with the Send Email workflow step.

> By default, the Automated radio button is selected upon opening the Email tab.

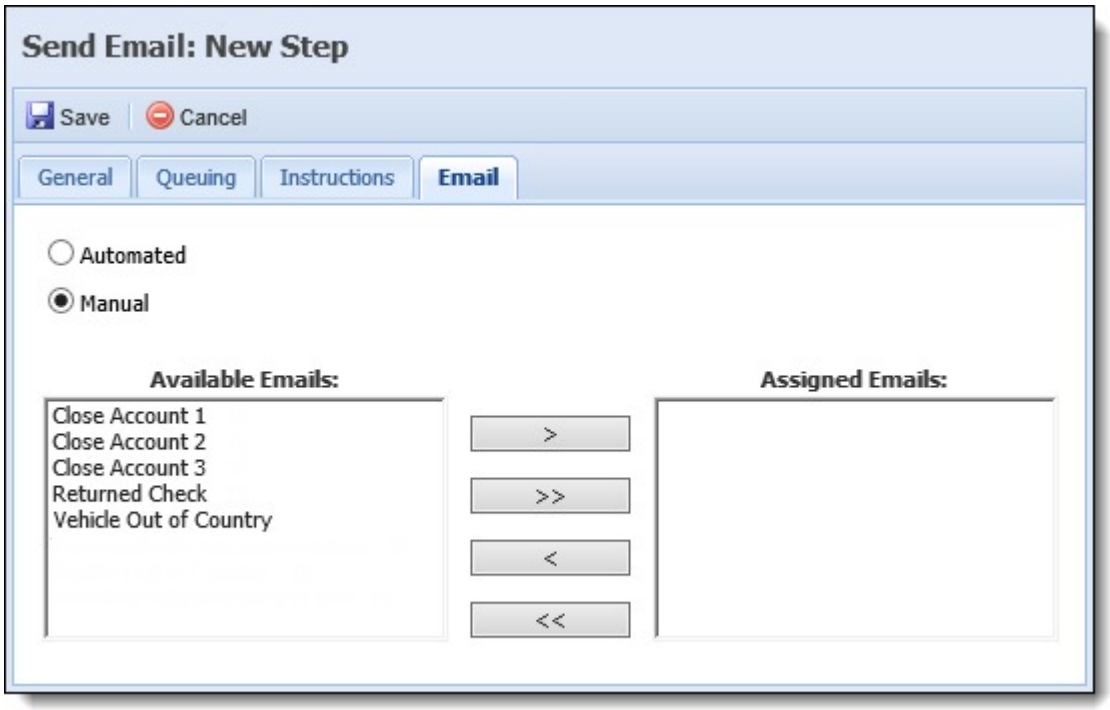


Select **Automated** to automatically send an email when the Send Email step executes in the workflow. Select **Manual** to allow users to select from a defined list of email templates when the step executes.

Once an option is selected, assign the email(s) to the workflow step within the Select an email section of the tab. This section appears differently depending on whether the step is configured as Automated or Manual.

When Automated is selected, the Email tab appears as shown below:

When set to Manual, the Email tab appears as follows:



Both the Select an email and Available Emails boxes display a list of the emails configured in System Management > Communication > Emails.

> For more information on configuring an email, please see the Emails topic in this guide.

To assign an email to the Send Email workflow step:

- When set to Automated, highlight the desired email within the Select an email box. The selected email is automatically sent to the related account holder(s) and/or contacts when the workflow step is executed.
- When set to Manual, highlight the desired emails) within the Available Emails box and move to the Assigned Emails box by clicking the arrows that display in the window.

Once an execution method has been determined and the desired emails are assigned to the workflow step, click Save to retain the workflow step configurations and add the Send Email step to the workflow.

Continue configuring workflow steps for the workflow and/or complete the remaining workflow attributes. Once saved, the workflow is available in the workspace to generate and send an email to the applicable account holders with the Send Email workflow step.

> For information on executing the Send Email workflow step in the workspace, please see the Send Email Workflow Step topic in the User guide.

Send Letter Workflow Step

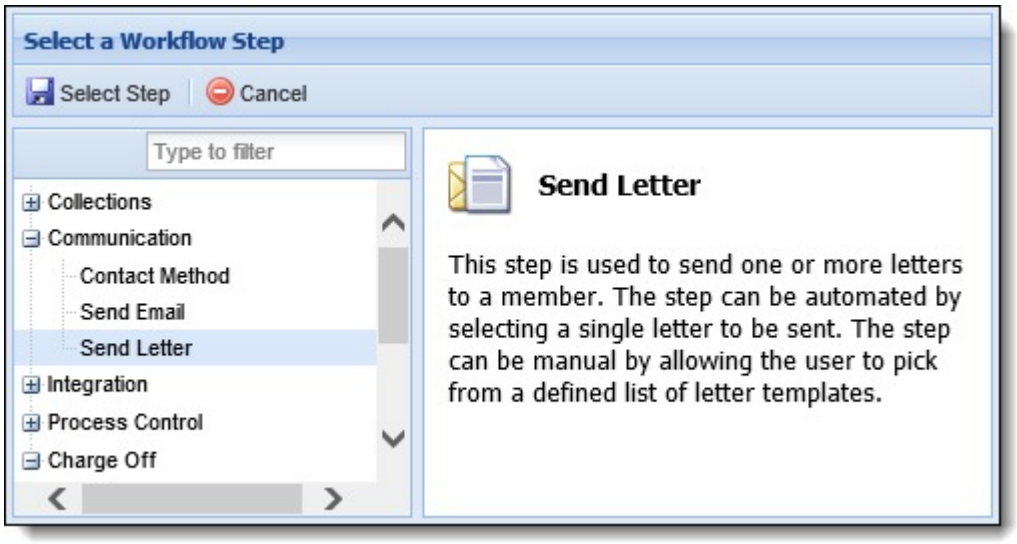
The Send Letter workflow step enables the ability to quickly and easily send one or more letters to account holders to provide them with information regarding their account or case, such as a delinquency or repossession notice. By configuring a workflow to include this step, administrators are able to define which letters are generated with the workflow step as well as determine whether a letter is automatically generated during execution of the workflow step, or users have the ability to manually select the letter(s) to be sent.

In order to edit a letter generated during the Send Letter workflow, the Edit Letters permission must be set to Change for the user and/or security group. This permission can be set under the Collections category in the Permissions tab of System Management > Users, or System Management > Groups > Security Groups.

Workflow Step Configuration

The Send Letter workflow step is configured to appear in a workflow from the Workflows page in System Management (System Management > Workflow > Workflows).

Similar to other workflow steps, the Send Letter step is added to a workflow from the Design tab in the Workflow Configuration window. For information on this tab and how to configure a workflow, please see the Workflows topic in this guide.



Step Properties

Once the Send Letter step is selected, a window appears to configure the step properties.

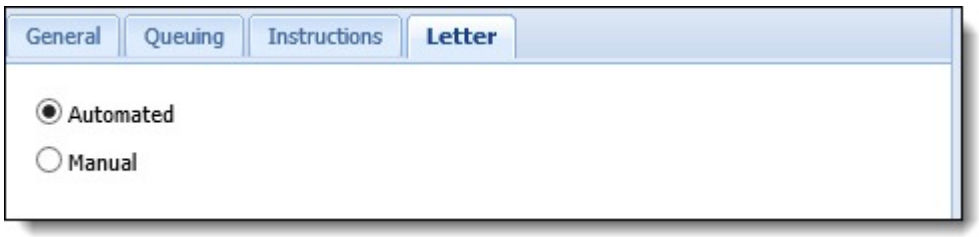
The General, Queuing and Instructions tabs for the Send Letter workflow step are completed in the same manner as other workflow steps. For information regarding the completion of these tabs, please see the Configuring Workflow Steps section in the Workflows topic.

Letter Tab

Within the Letter tab, administrators are able to determine the execution method for the Send Letter step as well as assign one or more letter(s) to be sent during execution of the workflow step.

The radio buttons that appear in the top of the tab determine how letters are generated with the Send Letter workflow step.

By default, the Automated radio button is selected upon opening the Letter tab.

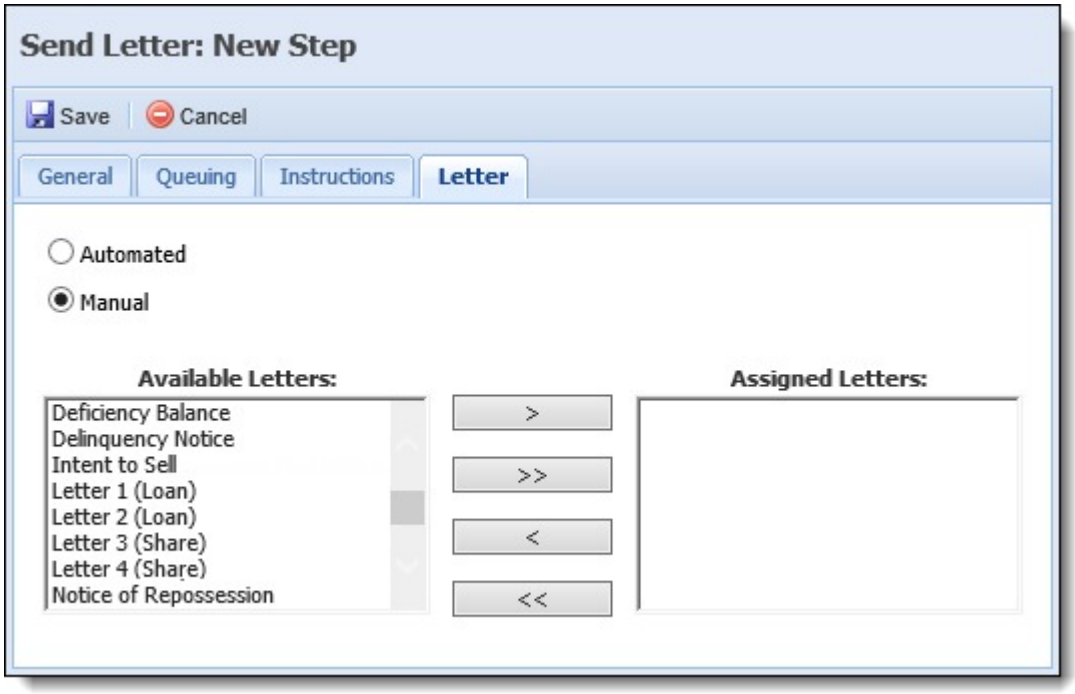


Select **Automated** to automatically send a single letter when the Send Letter step executes in the workflow. Select **Manual** to allow users to select from a defined list of letter templates when the step executes.

Once an option is selected, assign the letter(s) to the workflow step within the Select a Letter section of the tab. This section appears differently depending on whether the step is configured as Automated or Manual.

When Automated is selected, the Letter tab appears as shown below:

When set to Manual, the Letter tab appears as follows:



Both the Select a Letter and Available Letters box display a list of the letters configured in System Management > Communication > Letters and Forms.

> For more information on letter configuration, please see the Letters and Forms topic in this guide.

To assign a letter to the Send Letter workflow step:

- When set to Automated, highlight the desired letter within the Select a Letter box. The selected letter is automatically sent to the related account holder(s) when the workflow step is executed.

- When set to Manual, highlight the desired letter(s) within the Available Letters box and move to the Assigned Letters box by clicking the arrows that display in the window. The letters that appear in the Assigned Letters box are the options that display within the list of available letters in the first screen of the Send Letter workflow step.

Once an execution method has been determined and the desired letters are assigned to the workflow step, click Save to retain the workflow step configurations and add the Send Letter step to the workflow.

Continue configuring workflow steps for the workflow and/or complete the remaining workflow attributes. Once saved, the workflow is available in the workspace to generate and send letters to the applicable account holders with the Send Letter workflow step.

> For information on executing the Send Letter workflow step in the workspace, please see the Send Letter Workflow Step topic in the User guide.

Workflow Reason Codes

Workflow Reason Codes have been established so a user can record when a reason for delinquency is provided. There are a number of "reasons" that an account holder provides to a user to explain why a payment is late or incorrect. Reason Codes are not required by Temenos when submitting a note, but can be used for reporting capabilities on the reasons.

Administrators can manage reason codes by navigating to the System Management > Workflow > Workflow Reason Codes. The following columns display on the Workflow Reason Codes page:

Workflow Reason Codes

Workflow Reason Codes are used by callers to specify the reason for the call. These reasons are available when executing a workflow on an account.

Create | Copy | Edit | Delete

Name	Short Description	Long Description
REA01	Unemployed	Unemployed
REA02	Family Emergency	Family Emergency
REA03	Payment Posted Incorrectly	Payment Posted Incorrectly
REA04	Forgot to Send Payment	Forgot to Send Payment
REA05	Underemployed	Underemployed
REA06	Undisclosed Circumstances	Undisclosed Circumstances
REA07	Incarcerated	Incarcerated
REA08	Other Reason Given	Other Reason Given
REA09	Transfer Set Up Incorrectly	Transfer Set Up Incorrectly
REA10	Change In Financial Situation	Change In Financial Situation
REA11	Divorce	Divorce

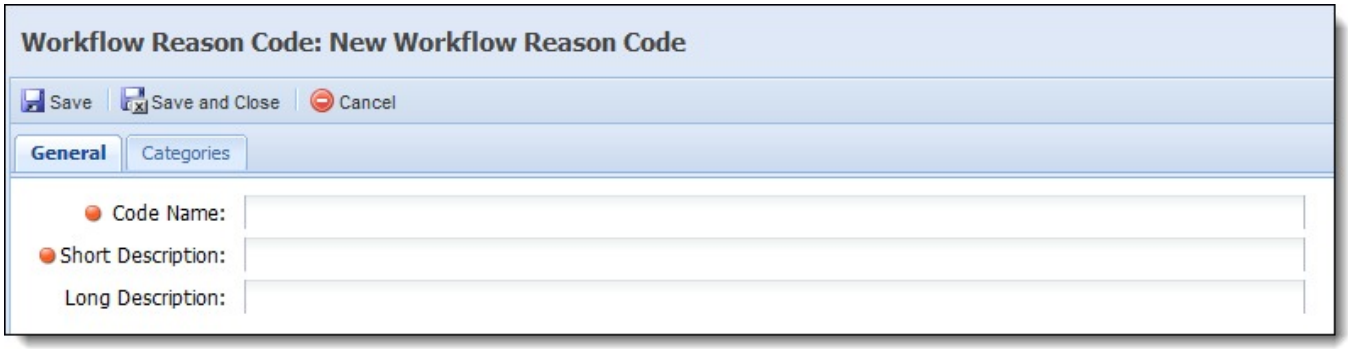
Column Name	Description
Name	The name of the reason code.
Short Description	The abbreviated description of the reason code.
Long Description	The full description of the reason code.

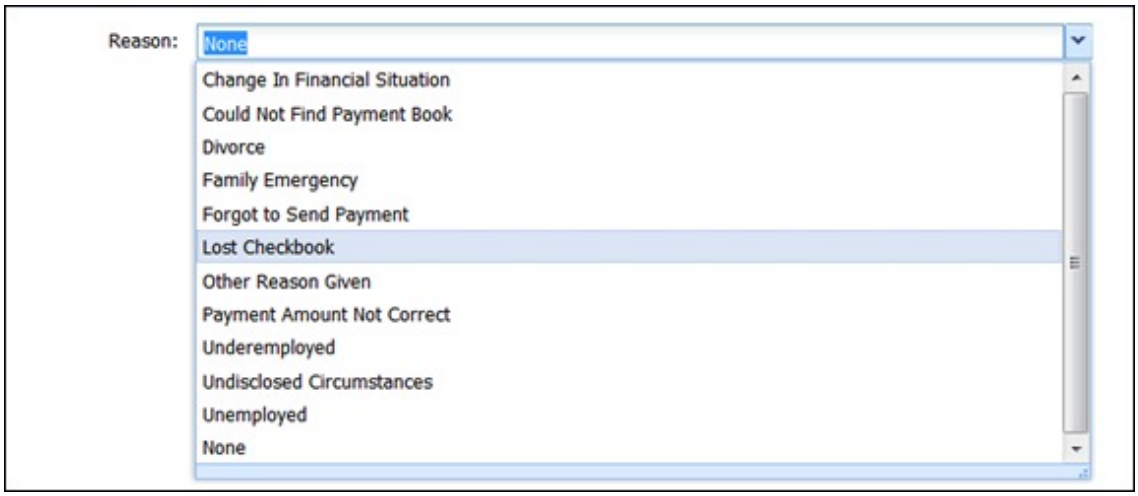
Workflow Reason Code Attributes

All workflow reason codes share common attributes that are defined while creating, copying, or editing a workflow

reason code.

General



Attribute	Description
Code Name	Provide an abbreviation of the Reason. This is a required field.
Short Description	Provide an abbreviated description of the reason code. The short description is shown to the user when selecting a reason. 
Long Description	Provide a full description of the reason code.

Categories

Categories are assigned to the reason code on the Categories tab.

Attribute	Description
Assign Categories	Assign available categories to have access to the reason code by selecting them and moving them to the Assigned Categories list.

Creating a Workflow Reason Code

- Click **Create.** The New Workflow Reason Code screen appears.
- Define the necessary attributes.
- When finished entering all information, click **Save** or **Save and Close** to save the new reason code and return to the Workflow Reason Code page. Click **Cancel** to return without saving.

- The new reason code populates in the grid and is now available to end-users when the Reason workflow step is included into a workflow.

Copying a Workflow Reason Code

- Select a reason code to highlight it and click **Copy.**
- The Coply Workflow Reason Code screen appears.
- Make all necessary changes.
- Click **Save** or **Save and Close** to save the reason code and return to the Workflow Reason Code page. Click **Cancel** to return without saving.
- The new copy is available to end-users when the Reason workflow step is included into a workflow.

Editing a Workflow Reason Code

- Select a reason code to highlight it and click **Edit.**
- The Edit Workflow Reason Code screen appears.
- Make all necessary changes.
- Click **Save** or **Save and Close** to save the reason code and return to the Workflow Reason Code page. Click **Cancel** to return without saving.

Deleting a Workflow Reason Code

- Select a reason code to highlight it and click **Delete**.
- A confirmation message appears.
- Click **Yes** to delete the reason code. Click **No** to return to the Workflow Reason Code page without deleting.

Cases

Cases provide a streamlined method of working specialty processes such as bankruptcies, repossessions, foreclosures, fraud, loan modifications, legal filings, and lawsuits.

Cases are suitable for complex processes that require flexibility in the tasks that are required for completion. Cases consist of one or more tasks which may be worked in parallel by multiple users. Cases can span across multiple account holders and accounts.

System Administrators can configure a icon to display in a column within the Related Accounts panel in System Management > Screens to alert that an account has an open case associated with it. Hovering over the icon displays the Case Number(s) and Case Type(s), providing immediate access to this information in the workspace.

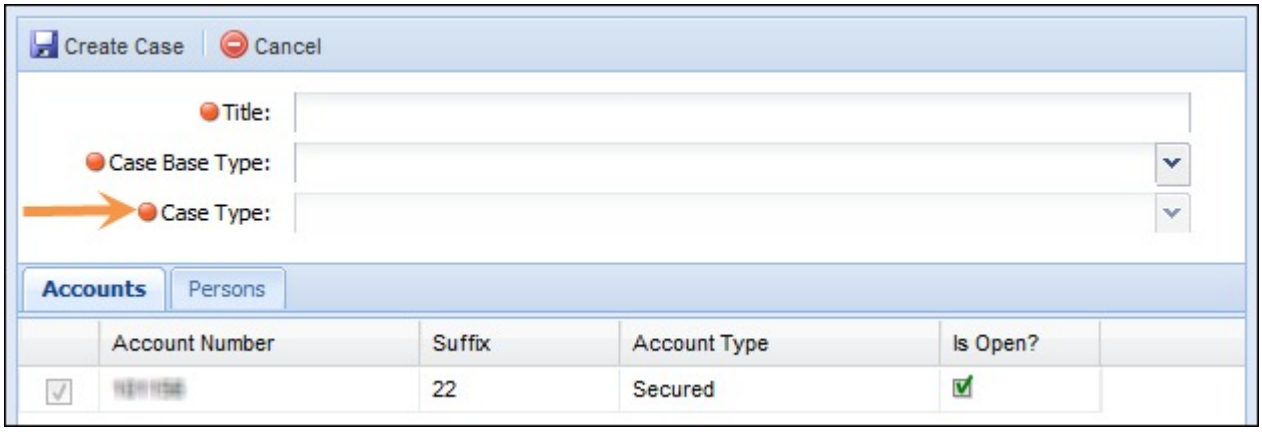
For more information about this field, please see the Top Area screen section of the Workspace Overview topic in this Guide.

See Cases for more information about cases in the workspace.

Case Types

When a new case is created, it has a Base Type which defines the general purpose of the case (repossession, bankruptcy, etc.). A Case Type is also chosen when creating a new case to define the more specific purpose of the case. For example, a case is created for a chapter 13 bankruptcy. Bankruptcy is the Base Type and Chapter 13 is the Case Type.

The Case Types feature allows administrators to create and manage individual case types that can be tied to system-defined Case Base Types. These individual case types are listed within a drop-down when a user creates a new case on an account.



The available fields in the Case Type drop-down is dependent on what is selected in the Case Base Type drop-down.

Case Processes and Case Queues

Administrators can configure Case Types to be tied to specific Case Processes and Case Queues. If assigned to a Case Process and that specific case type is selected in the workspace, a user with appropriate permissions can add the assigned process to the task list.

Case queues allow individual tasks to be organized and scheduled to be worked by different departments. If assigned to a case queue, all individual tasks associated to the case type are routed into the designated case queue to be worked. For more information on Case Types, see the Case Types topic in the System Administrator Guide.

Temenos Infinity contains several features that allow system administrators to customize the end-user experience when running tasks on cases. These features are highlighted below:

Feature	Description
Tasks	Cases are made up of tasks. Tasks define the steps that are required in order to work the case.
Case Processes	Case Processes are collections of individual tasks that perform a business function. These processes can be configured in System Management > Collections > Case Process page and tied to several features within Temenos Infinity. For example: • Assign a configured workday schedule to the process. • Assign one or more Case Types to the process. If a case type is assigned, users with appropriate permissions can add the process to an existing task tree in the workspace.

Case Queues	Case Queues are designed to house individual tasks that are scheduled to be worked by users with appropriate permissions. Administrators can assign individual users and/or security groups to have access to the Case Queue from the Ribbon Bar.

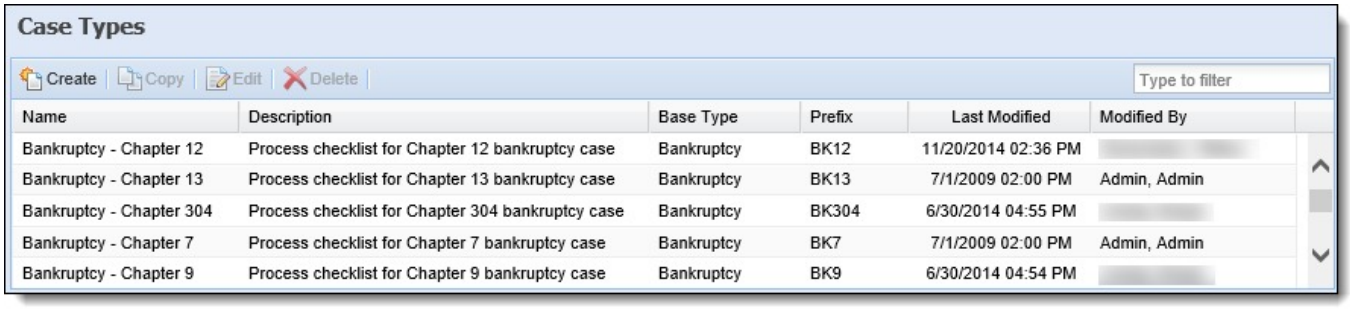
The Data Capture folder in the Field List for screens and reports includes fields that can be used to capture values when creating, working, and linking cases. Business Rule functionality can also be used to set the values of these fields automatically. The following fields have been added to capture data values:

Field	Data Values
Bankruptcy-Related Fields	• Balance At Bankruptcy • DQ Amount At Bankruptcy • Days DQ At Bankruptcy • Late Charges At Bankruptcy • Interest Due At Bankruptcy • Minor Code At Bankruptcy • Collateral Code At Bankruptcy • Purpose Code At Bankruptcy • Loan Type Code At Bankruptcy
Foreclosure-Related Fields	• Balance At Foreclosure • DQ Amount At Foreclosure • Days DQ At Foreclosure • Late Charges At Foreclosure • Interest Due At Foreclosure • Taxes Due At Foreclosure • Escrow Balance At Foreclosure • Minor Code At Foreclosure • Collateral Code At Foreclosure • Purpose Code At Foreclosure • Loan Type Code At Foreclosure
Legal-Related Fields	• Balance At Legal • DQ Amount At Legal • Days DQ At Legal • Late Charges At Legal • Interest Due At Legal
Repossession-Related Fields	• Balance At Repo • DQ Amount At Repo • Days DQ At Repo • Late Charges At Repo • Interest Due At Repo • Minor Code At Repo • Collateral Code At Repo • Purpose Code At Repo • Loan Type Code At Repo

Case Types

A Case Type denotes the specific purpose of a case. When a new case is created in Temenos Infinity, a Base Type is chosen which defines the general purpose of the case (repossession, bankruptcy, etc.). A Case Type is also chosen when creating a new case to define the more specific purpose of the case. For example, a case is created for a chapter 13 bankruptcy. Bankruptcy is the Base Type and Chapter 13 is the Case Type.

By navigating to the System Management > Collections > Case Types page administrators can manage existing Case Types and create new Case Types that are available to end users when creating a Case in the workspace.



Name	Description	Base Type	Prefix	Last Modified	Modified By
Bankruptcy - Chapter 12	Process checklist for Chapter 12 bankruptcy case	Bankruptcy	BK12	11/20/2014 02:36 PM	
Bankruptcy - Chapter 13	Process checklist for Chapter 13 bankruptcy case	Bankruptcy	BK13	7/1/2009 02:00 PM	Admin, Admin
Bankruptcy - Chapter 304	Process checklist for Chapter 304 bankruptcy case	Bankruptcy	BK304	6/30/2014 04:55 PM	
Bankruptcy - Chapter 7	Process checklist for Chapter 7 bankruptcy case	Bankruptcy	BK7	7/1/2009 02:00 PM	Admin, Admin
Bankruptcy - Chapter 9	Process checklist for Chapter 9 bankruptcy case	Bankruptcy	BK9	6/30/2014 04:54 PM	

The following columns display on the Case Types page:

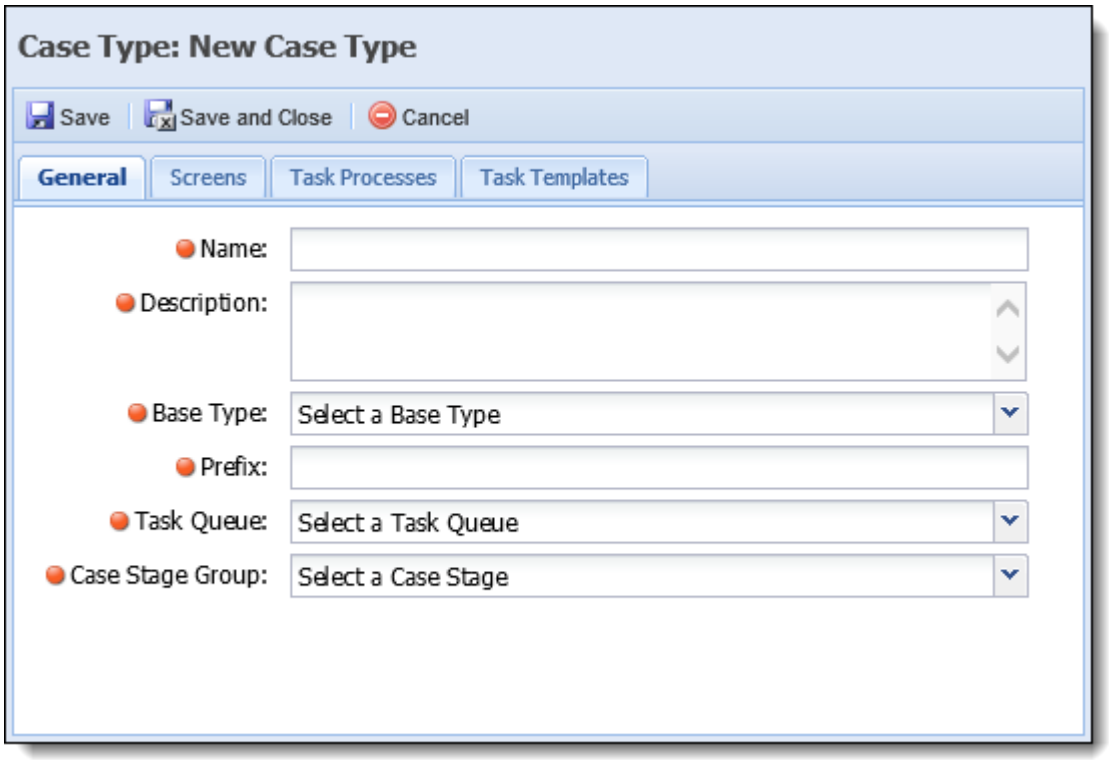
Column Name	Description
Name	Displays the name of the case type.
Description	Displays a description of the case type.
Base Type	Displays the case base type in which the case type is connected to.
Prefix	Displays the prefix associated to the case type.
Last Modified	Denotes when the last modification was made on a case type.
Modified By	Denotes who made the last modification on a case type.

Case Type Attributes

All case types share common attributes that are defined while creating, copying, or editing a case type.

General

All general attributes provide basic information about the case type and are required.

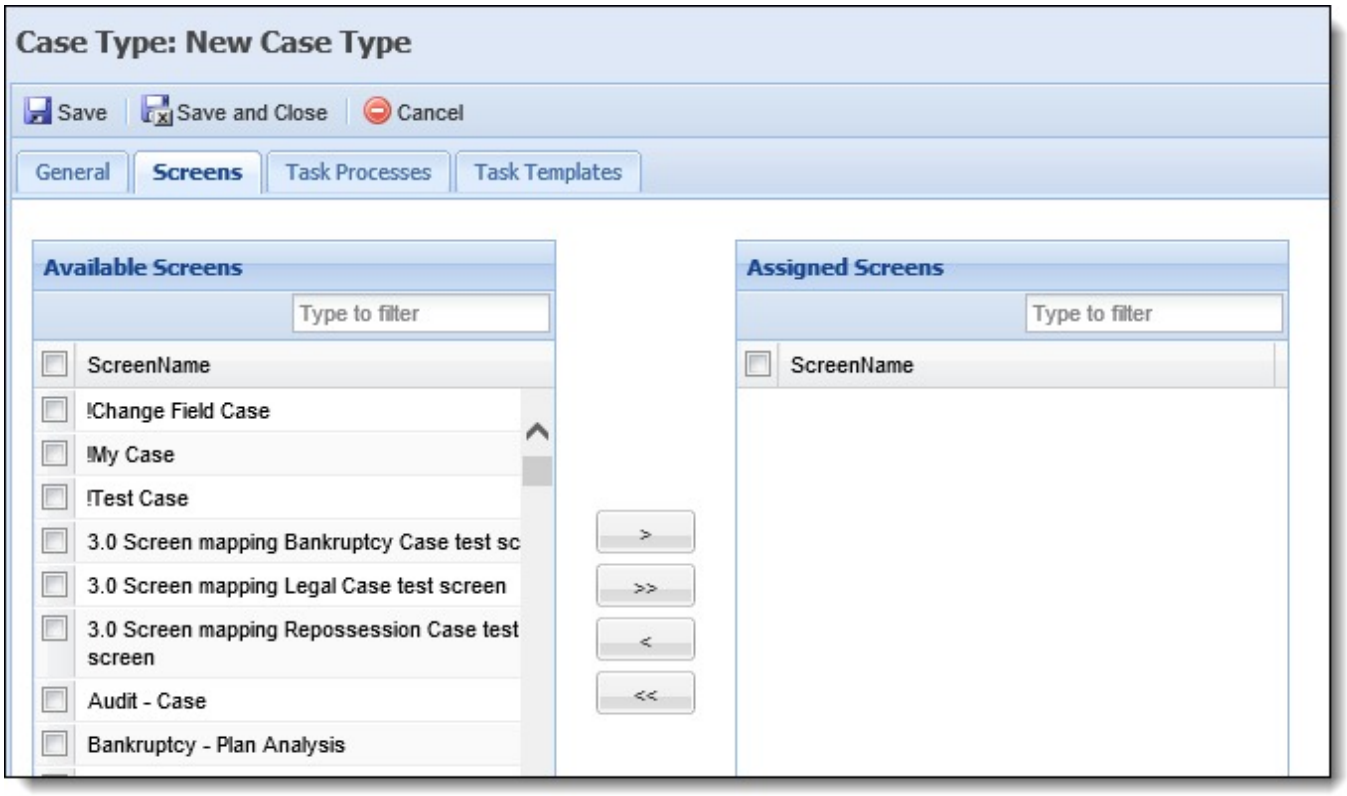


The following attributes are defined on the General tab:

Field	Description
Name	Enter a name for the new case type.
Description	Enter a description for the new case type to provide administrators more information about the case type on the page in System Management.
Base Type	Select a Base Type, the type of case (bankruptcy, repossession, etc.), to which the new case type is associated to. When creating a new case, the base type chosen drives the drop-down list of case types that are available.
Prefix	Enter a prefix for the new case type. The prefix is used when creating the case number: ([Prefix] - [Incremental Number]).
Task Queue	Select a Task Queue. All tasks assigned within this case type are assigned to the selected Case Queue by default. This value is overridden if a task is configured with an assigned task queue.
Case Stage Group	Select a Case Stage in which the new case type is applied. Case Stage Groups are defined in System Management > Field Configurations.

Screens

Screen attributes allow administrators to determine which additional screens are displayed in the Screens menu in the workspace of this case type.

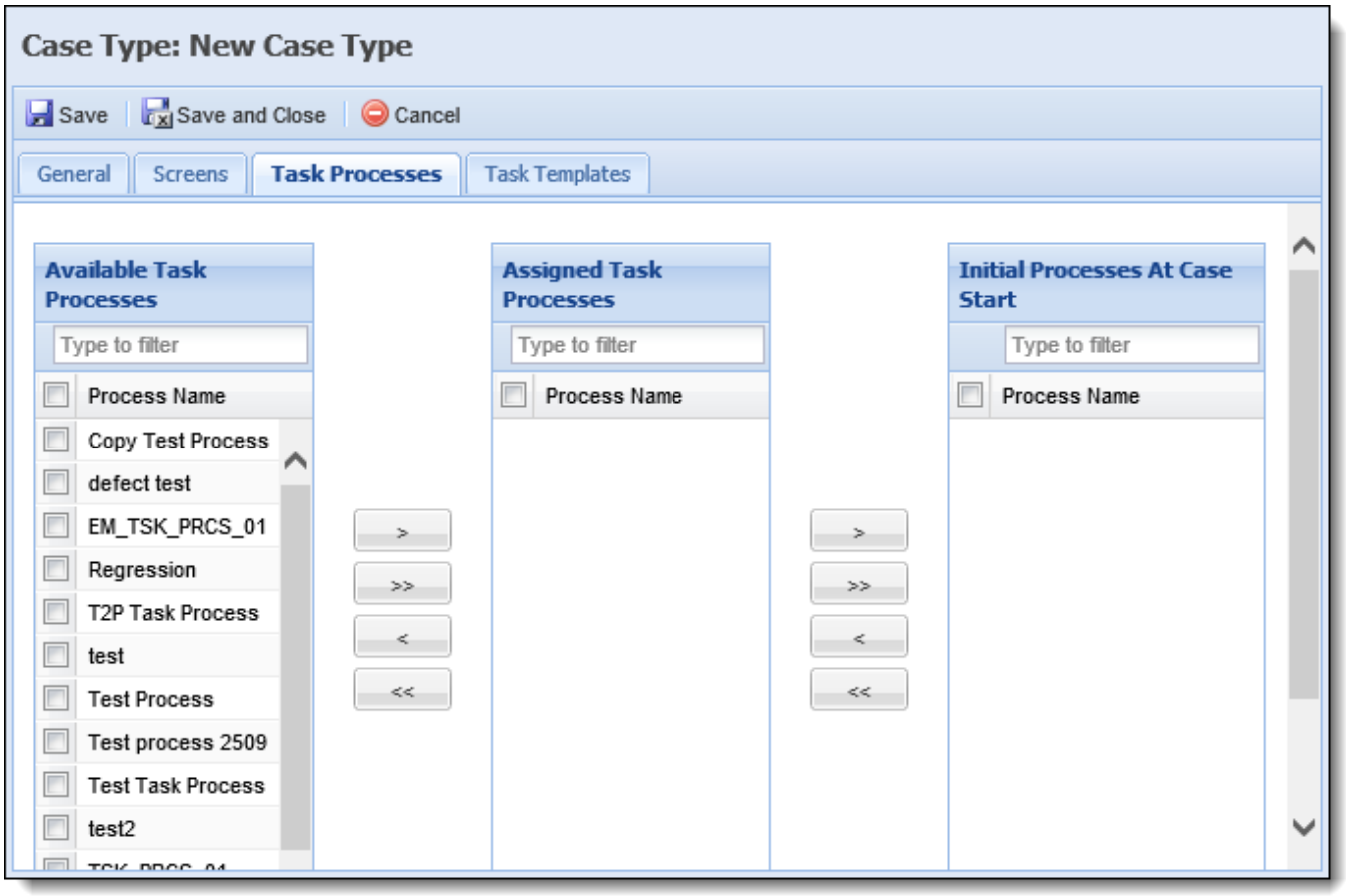


The Screen attributes defined on the Screens tab:

Attribute	Description
Available	Displays a list of all screens configured in System Management > Screens. Assign a screen to a case type by selecting the desired screen(s) from the list and moving the screen(s) to the Assigned Screens box using the arrows that display.
Assigned	Displays a list of the screens assigned to the case type. Once the case type is saved, the screens are available in the screen menu while the case type is in context in the workspace. The order of the screens listed in the workspace Screen menu determines the order in which processes appear in the Case Task screen. The process order can be rearranged by dragging and dropping screens in the Assigned list. This is not a required action to select screens.

Case Processes

The case process attributes allow administrators to assign a level of access to all case processes available in Temenos Infinity.



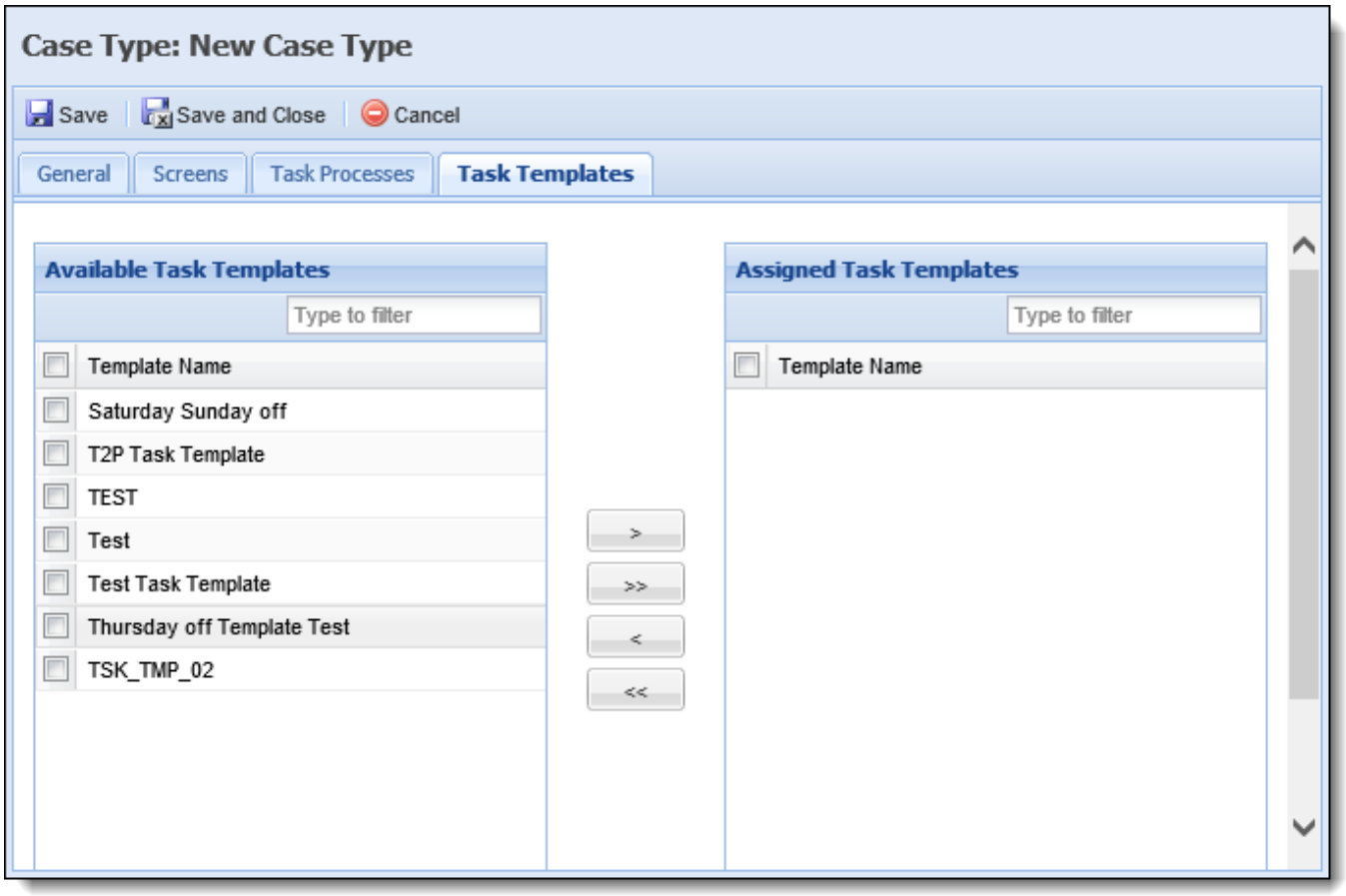
The Case Process attributes are defined on the Case Process tab:

Attribute	Description
Available Case Processes	Contains a list of all available case processes in Temenos Infinity.
Assigned Case Processes	Contains a list of available case processes that a user can add to the task tree while working a case. By default, case processes that assigned the appropriate case type attributes are assigned to this list.
Initial Processes At Case Start	Contains a list of case processes that are automatically included in the case type when a new case is created.

Case processes can be assigned to different lists by using the arrows that are displayed.

Case Tasks

The Case Task attribute allows individual tasks to be assigned to a Case Type separate from a case process.



Case Type attributes are defined on the Case Task tab:

Attribute	Description
Available Case Tasks	Displays a list of all case tasks configured in System Management > Collections > Case Tasks. Assign case task(s) to a case type by selecting the desired case task(s) from the list and moving it to the Assigned Case Tasks box using the arrows that display.
Assigned Case Tasks	Displays a list of all cast task(s) assigned to a cast type.

When finished entering all information on the tabs, click Save and Close to save the new case type and return to the case types page. The new case type populates in the case type list and is available for users to use when creating a case in Temenos Infinity. Click Cancel to return to the case types page without saving.

Creating and Managing Case Types

Within the Case Types page, administrators are able to perform the following actions:

- Creating a Case Type

The create function allows administrators to create new Case Types that can be used in the workspace.

- Navigate to the Case Types page in System Management and click Create
- The Case Type edit screen appears. Navigate through the tabs and define the necessary attributes.

- When finished, click Save and Close to save the new case type and return to the Case Types page. Click **Cancel** to return without saving.

Copying a Case Type

The Copy function enables administrators to duplicate an existing Case Type. The existing Case Type can be used as a base for creating a new Case Type.

- Highlight the case type that is to be copied and click Copy.
- The Copy Case Type screen appears. Navigate through the tabs and make any necessary changes to the case type attributes.
- When finished, click Save and Close to save the new case type and return to the Case Types page. Click Cancel to return without saving.

Editing a Case Type

The Edit function enables administrators to revisit existing case types and edit the attributes assigned to them.

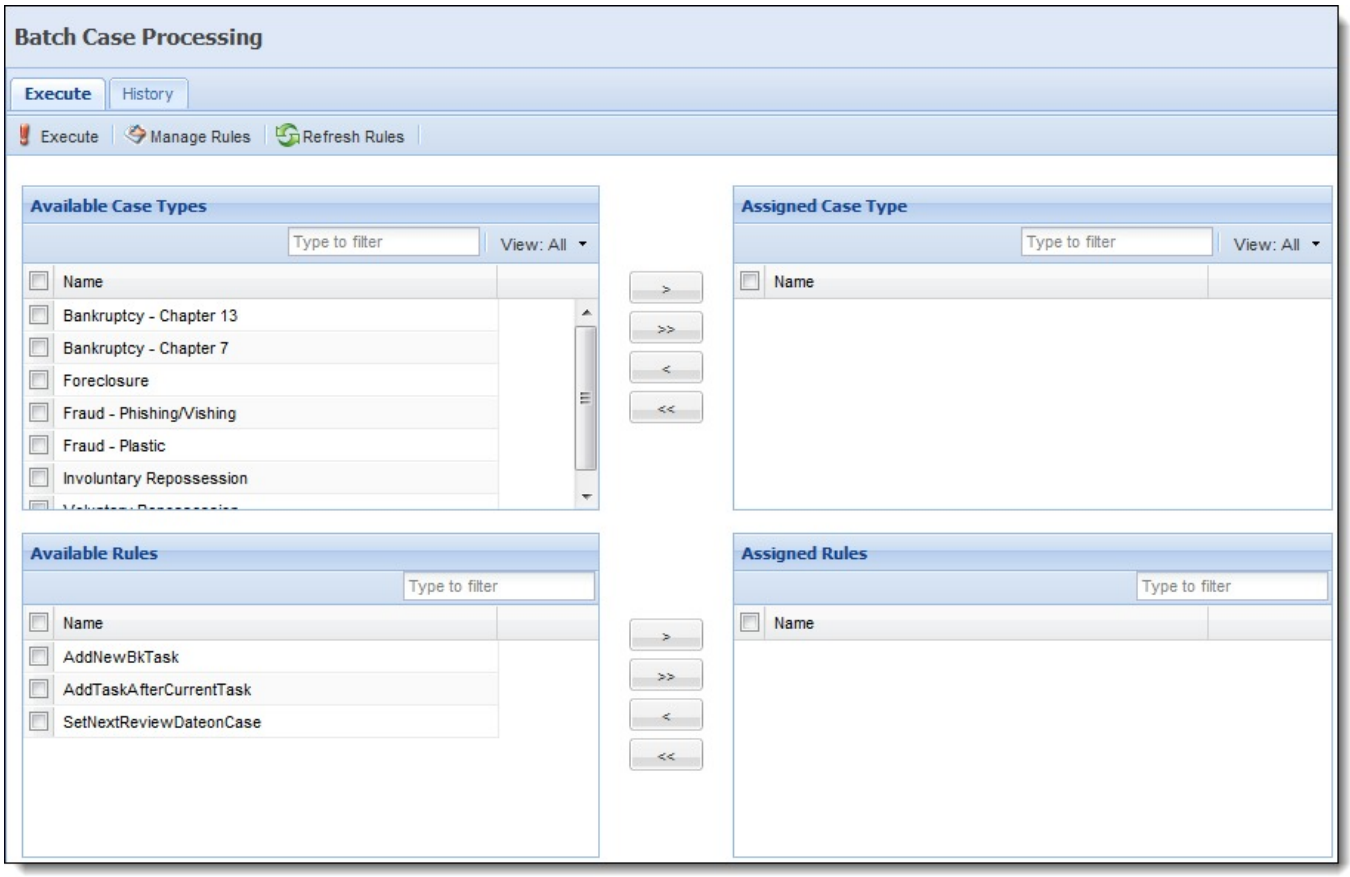
- Highlight the case type that is to be edited and click Edit.
- The Edit Case Type screen appears. Navigate through the tabs and make any necessary updates to the attributes.
- When finished, click Save and Close to save the case type and return to the Case Types page. Click Cancel to return without saving.

Deleting a Case Type

- Highlight the case type that is to be deleted and click Delete.
- A confirmation message appears.
- Click **Yes** to delete the Case Type. Click **No** to return to the Case Types page without deleting.

Batch Case Processing

From the Batch Case Processing page in System Management (System Management > Batch Case Processing), an administrator can execute business rules against cases. Administrators can filter which cases are included using the case type. The selected business rules can change fields on the case, add new tasks/processes, etc.



The Batch Case Processing page includes the following two tabs:

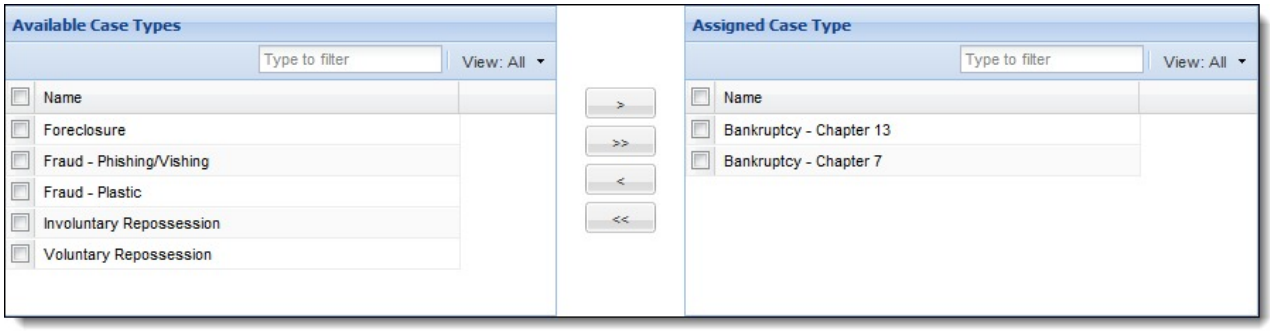
- Execute
- History

Execute

From the Execute tab, Administrators can assign available rules to run on designed case types populated in Temenos Infinity.

To Execute a Batch Case Process:

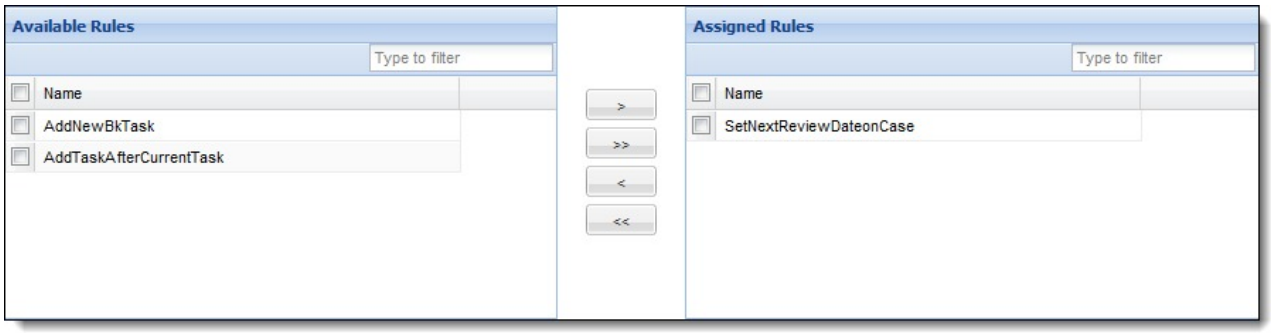
- From the Available Case Types box, click to highlight case types on which the business rules are to be run.
- Click the > button to move the selections to the Assigned Case Type box. Click >> to assign all the available case types.
- Double clicking an item moves the case type over as well.



- From the Available Rules box, click to highlight rules that are to run on the assigned case types.

> Clicking the **Manage Rules** button loads the Rules Management application. If any changes are made in the BatchCaseProcessing category in the Rules Management application they appear on this page by clicking the **Refresh Rules** button. Only rules built in the BatchCaseProcessing category are available to use.

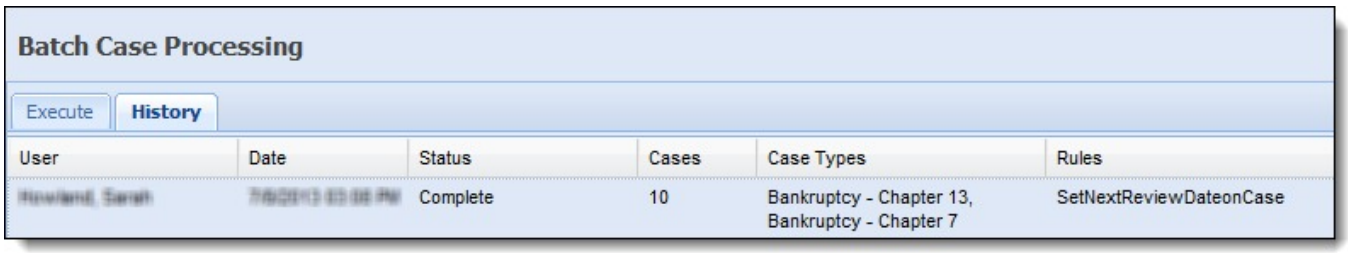
- Click the > button to move the selections to the **Assigned Rules** box. Click >> to assign all rules to run on the assigned case types. Double clicking an item moves the case type over, as well.



- Click **Execute**. A message appears showing that the execution has started. Click **OK** to navigate back to the Execute page.
- A Batch execution is in process message displays on the top right of the screen showing that the process is running.
- When the process completes, a success message appears. The process is documented in the History tab.

History

The History tab displays a list of Batch Case Processes that have been executed.



The following columns display on the History tab:

Column Name	Description
User	Displays the user who ran the process.
Date	Displays the date in which the process ran.
Status	Displays the status of the process (Complete or Failed).
Cases	Displays the number of cases affected by the process.
Case Types	Displays the case types associated to the process.
Rules	Displays the rules that were ran as part of the process.

Workday Schedules

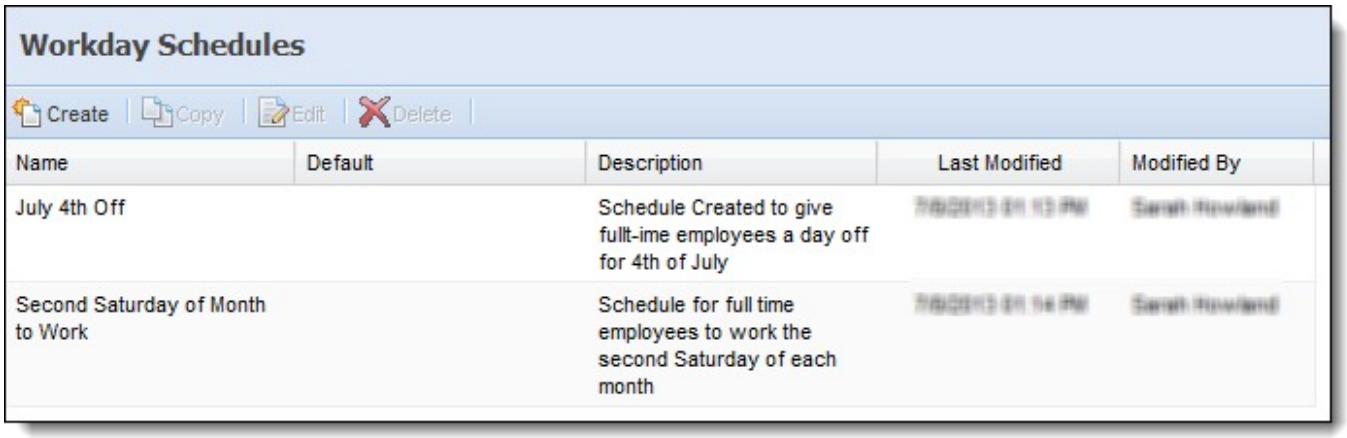
The Workday Schedules provides administrators the ability to define one or many calendars to include workdays and exclude days such as holidays and weekends. By default, calendar days are used with a default start time of 8:00 AM and end time of 5:00 PM. Workday schedules are also used in calculating the duration of a task.

> Administrators can change the default setting for start and end times on the Administrative Settings page.

Administrators can use workday calendars for many reasons such as if a financial institution, or a department within a financial institution, is not operating 7 days a week including holidays. In this scenario, it is recommended that the administrator define a working day calendar to define which days in the calendar year should be included when calculating a task's due date.

If different departments or areas have varying working days, multiple workday schedules can be created to ensure task due dates and Key Performance Indicators (KPI's) are calculated accurately.

By navigating to the System Management > Workday Schedules page, administrators can create new workday schedules, copy existing workday schedules, edit existing workday schedules, and delete workday schedules.



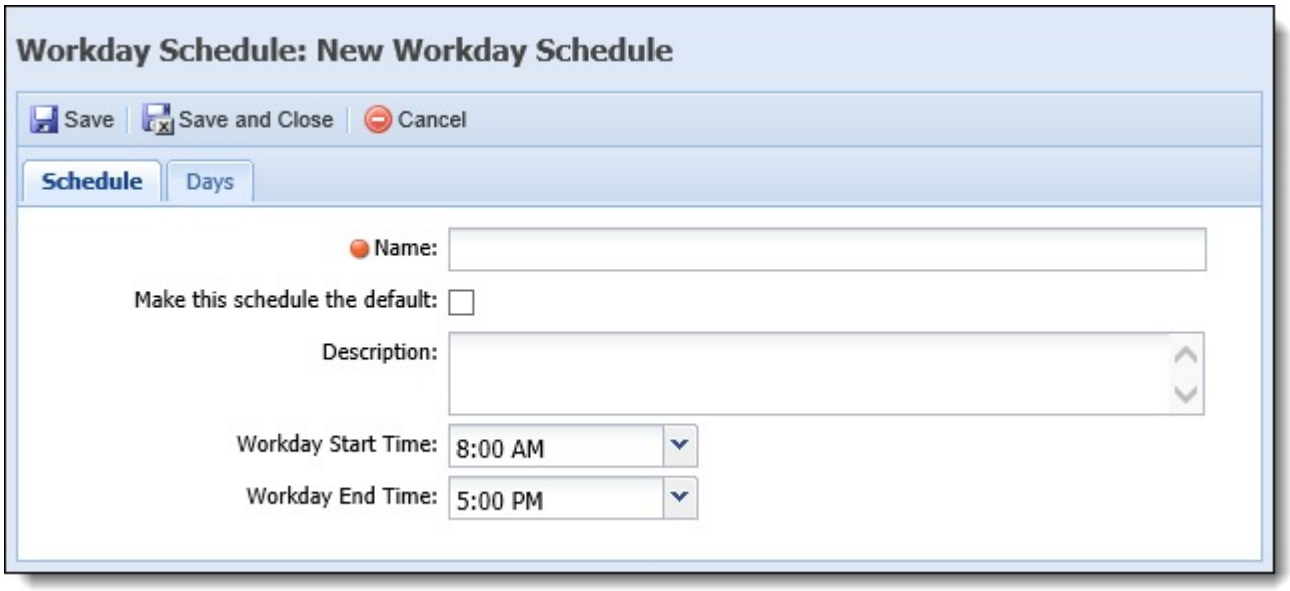
The Workday Schedules page contains the following columns:

Column Name	Description
Name	Name of the workday schedule.
Default	Displays whether the schedule is default.
Description	Description of the workday schedule.
Last Modified	Denotes when the last modification was made.
Modified By	Denotes who made the last modification.

Workday Schedule Attributes

All workday schedules share common attributes that are defined while creating, copying, and editing a Workday Schedule.

Schedule



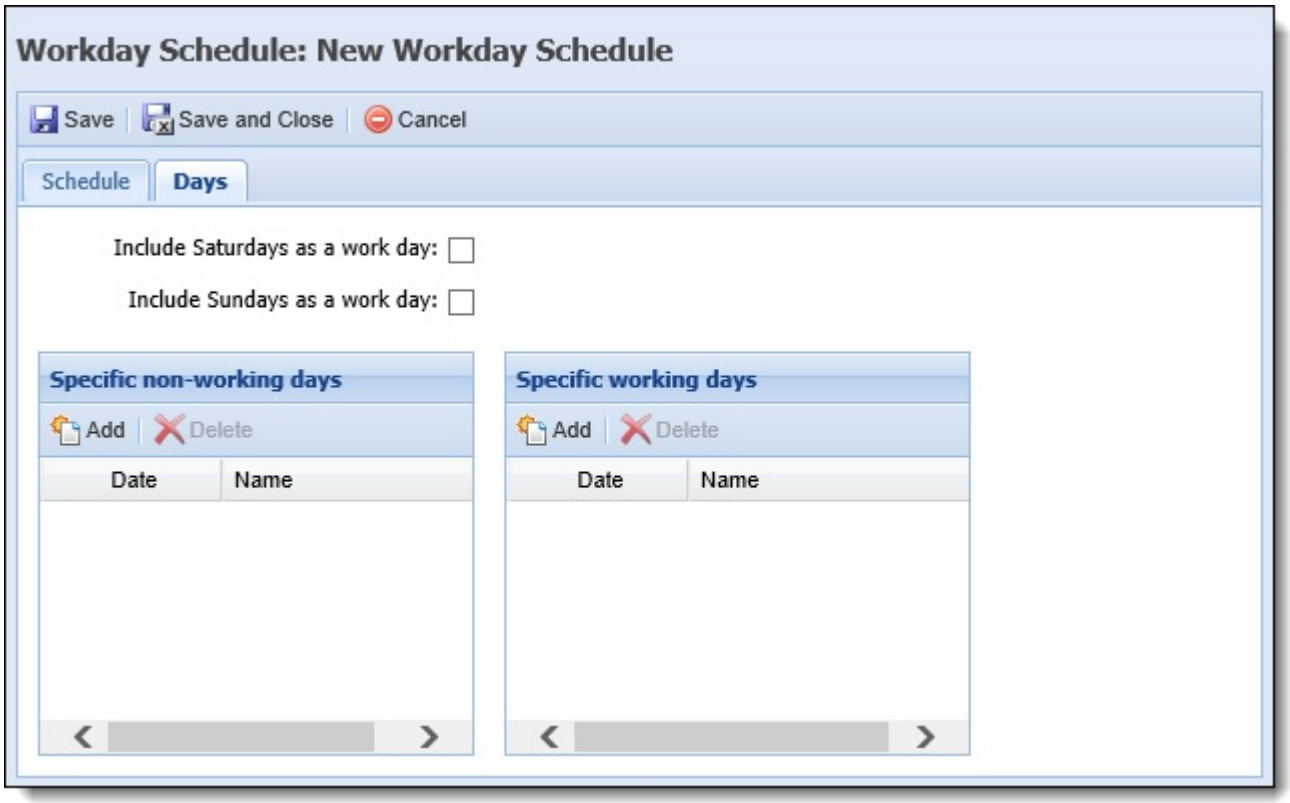
Schedule attributes are located within the Schedule Tab:

Field	Description
Name	Enter the name for the new Workday Schedule. This is a required field.
Make this schedule the default	Check this box to make this the default schedule for Temenos users. Only one schedule can be marked as default. If this new schedule is marked as default, the default flag is cleared on all other existing workday schedules.
Description	Enter a description to provide more specific information about the new Workday Schedule. The description can be seen by administrators on the Workday Schedules system management page.
Workday Start Time	Select the start time of a workday from the drop-down list. This is a required field.
Workday End Time	Select the end time of a workday from the drop-down list. This is a required field.

In Temenos Infinity, time is formatted in quarter hour increments.

When finished entering the fields in this tab, click **Save**. The Workday Schedule must be created and saved successfully before any days can be assigned to it. If a user advances to the Days tab without a record having been saved, the tab contents do not appear and a message displays stating, “the schedule record must first be saved.”

Days



Days attributes are located within the Days Tab:

Field	Description
Include Saturdays as a work day	Select the check box to include Saturday in the default work schedule.
Include Sundays as a work day	Select the check box to include Sunday in the default work schedule.
Specific non-working days	Click **Add.** A new entry appears with today's date as default. • To change the date, click in the Date column and use the calendar icon to select the date. • To enter a description, click in the Description column and manually enter a description of the non-working day. • To delete a non-working day, click to highlight the day to be deleted and click **Delete.**

Specific working days	Specify working days to override a default "do not include Saturdays/Sundays as a work day" choice to make a specific Saturday or Sunday calculated as a work day. To add working days: • Click **Add.** A new entry appears with today's date as default. • To change the date, click in the Date column and use the calendar icon to select the date. • To enter a description, click in the Description column and manually enter a description of the non-working day. • To delete a working day, click to highlight the day to be deleted and click **Delete.**

When a Workday Schedule is saved, it lasts for two years. After two years, the schedule restores back to the default and must be re-configured.

Creating a Workday Schedule

To create a new Workday Schedule click **Create**.

The New Workday Schedule screen appears. Navigate through the Schedule sand Days tabs to update attributes.

When finished entering all information for the new workday, click **Save and Close** to save the new workday schedule and return to the Workday Schedule page. The Workday Schedule populates in the list. Click **Cancel** to return to the Workflow Schedule page without saving.

Copying a Workday Schedule

Select to highlight the Workday Schedule that is to be copied, click **Copy**.

The Copy Workday Schedule screen appears. Navigate and make any necessary changes within the Schedule and Days tabs.

When finished, click **Save and Close** to save the new Workday Schedule and return to the Workday Schedules page. The Workday Schedule populates in the list and is available to apply to Task Templates and Task Processes. Click **Cancel** to return to the Workday Schedules list without saving.

Editing a Workday Schedule

Select to highlight the Workday Schedule to be edited, click **Edit**.

The Edit Workday Schedule screen appears. Navigate and make any necessary changes within the Schedule and Days tabs.

When a workday schedule is edited, all areas that adhere to it automatically pick up the modifications.

When finished, click **Save and Close** to save the Workday Schedule and return to the Workday Schedules page. Click **Cancel** to return to the Workday Schedules list without saving.

Deleting a Workday Schedule

Click to highlight the Workday Schedule that is to be deleted, click **Delete**.

A confirmation message appears. Click **Yes** to delete the Workday Schedule. Click **No** to return to the Workday Schedules page without deleting.

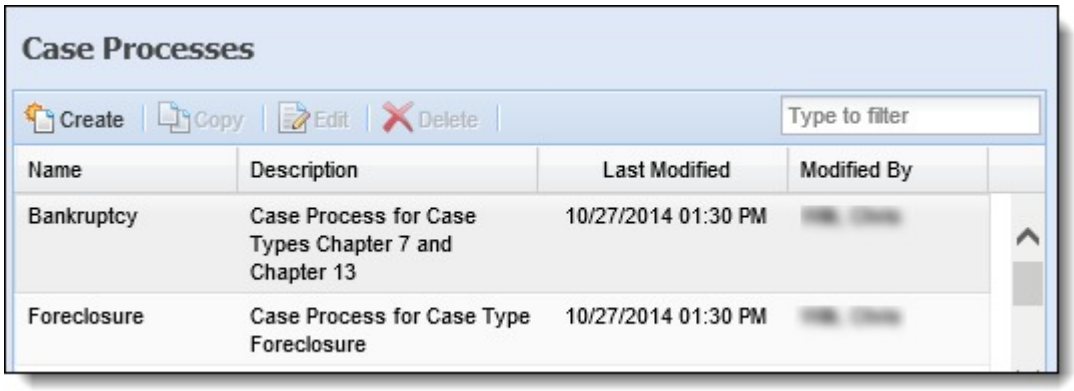
Case Processes

A Case Process is a collection of tasks grouped together to perform a business function such as an automobile repossession. Case processes are assigned to case types to include the business functions necessary to resolve a case.

The Case Process topic includes the following attributes and instructions to assist administrators with creating, copying, editing, and deleting case processes:

- Case Process Attributes
  - General
  - Tasks
  - Case Types
- Creating a Case Process
  - Building a Case Process
    - Adding Tasks
    - Creating Dependencies
    - Defining Results
- Copying a Case Process
- Editing a Case Process
- Deleting a Case Process

Administrators can create new processes and manage existing ones by navigating to the System Management > Collections > Case Processes page.



The Case Process page contains a grid that displays a list of all the case processes configured. This grid contains the following details:

Column	Description
Name	The name of the case process.
Description	Details about the case process.
Last Modified	Denotes when the last modification was made to the case process.
Modified By	Denotes who made the last modification to the case process.

Case Process Attributes

All case processes share common attributes that are defined while creating, copying, or editing a case process.

General

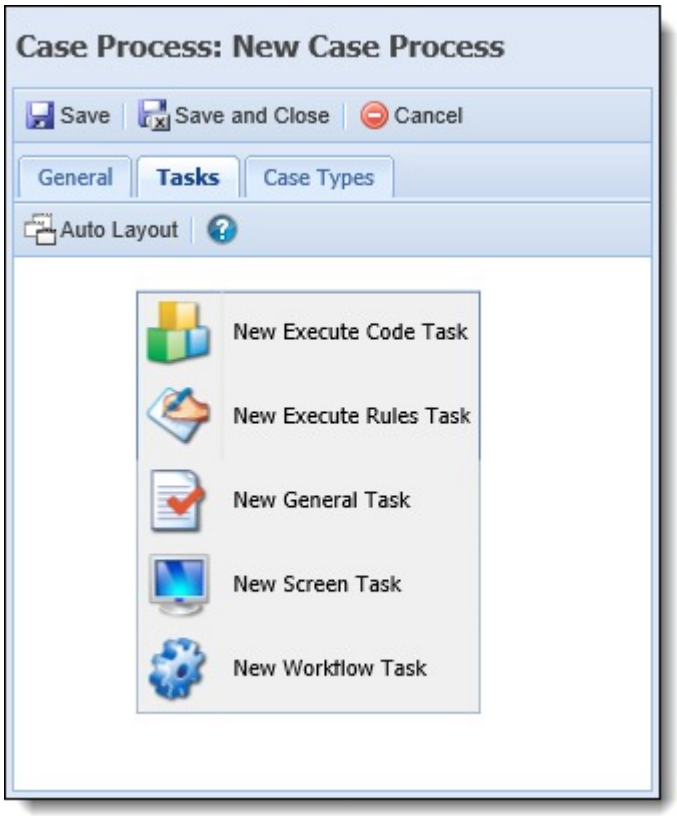
The general attributes provide basic information about case processes and are located on the general tab.

General attributes are located on the General Tab:

Attribute	Description
Name	Enter a name for the case process. This is a required field.
Description	Provide details about the purpose and use of the case process. The case process description is visible to administrators from the case processes administration page and end users when they browse case processes to add to a case.
Workday Schedule	Specify the default calendar to be used when creating new tasks within the Case process. The workday schedule calendar is used to calculate a task's expected start, completion, and due dates, and is also used to calculate the task Escalate Schedule. See Workday Schedules for more information. If the workday schedule is changed, the Case process must be saved in order for the new schedule to be used when creating new tasks.

Tasks

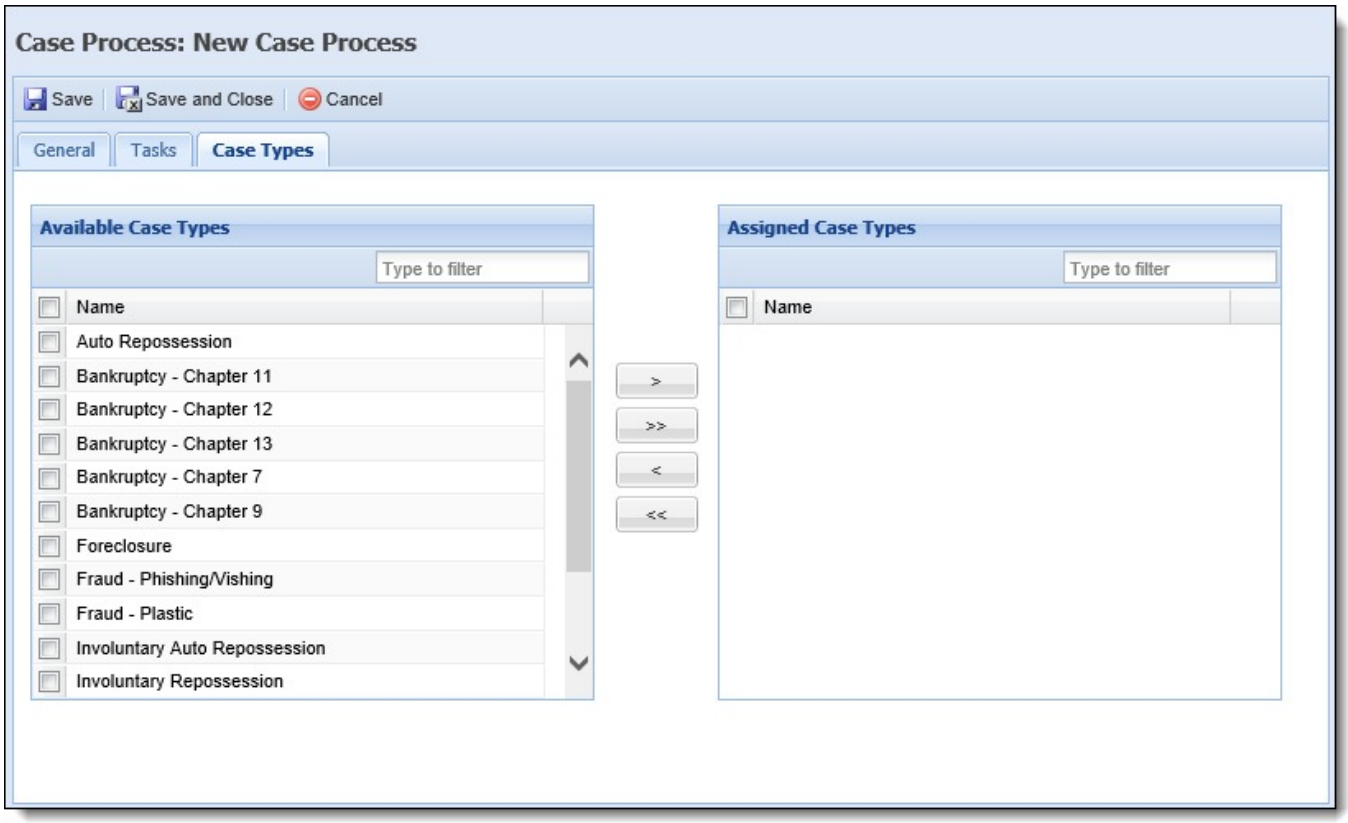
The tasks attribute is an interactive screen for administrators to build a Case process. There are five task types that can be included in a case process: General, Screen, Execute Code, Workflow, and Execute Rules.



For more information about the available task types, please see the Case Tasks topic in this guide.

Case Types

The case types attribute allows administrators to assign a case process to case types. If a case type is assigned to the case process, the process is available to be added to the case by a user with appropriate permissions.



Attribute	Description
Available	Displays a list of all Case Types configured in System Management > Collections > Case Types. Assign a case type by selecting the desired case type(s) from the Available Case Types list and move them to the Assigned Case Types.
Assigned	Displays a list of the Case Types assigned to the case process. Once the case process is saved, it is assigned to the designated Case Types.

Creating a Case Process

The Create function allows administrators to create new case processes that can be utilized in case types.

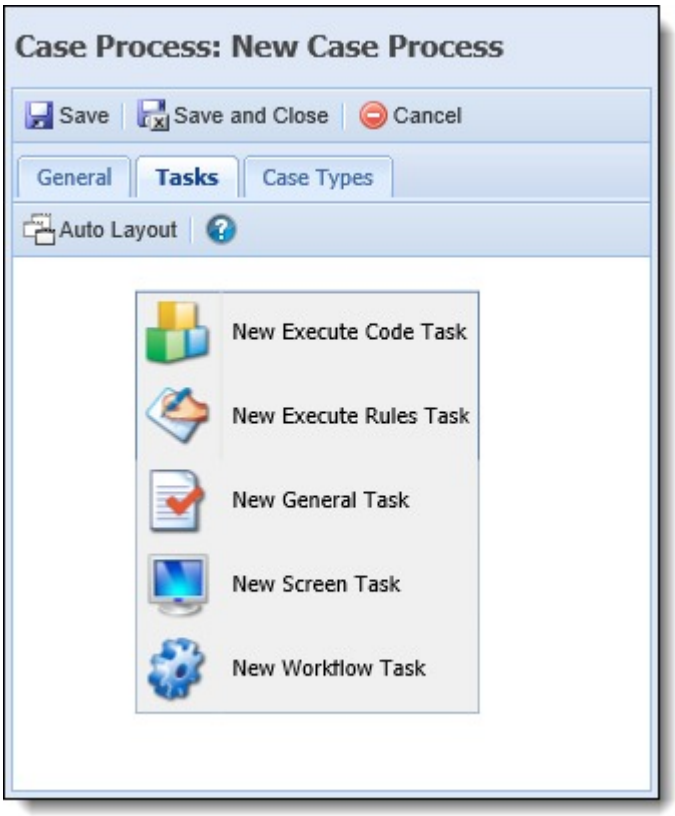
- To create a case process navigate to System Management > Collections > Case Processes and click Create.
- Navigate through the tabs and define the case process attributes.

Building a Case Process

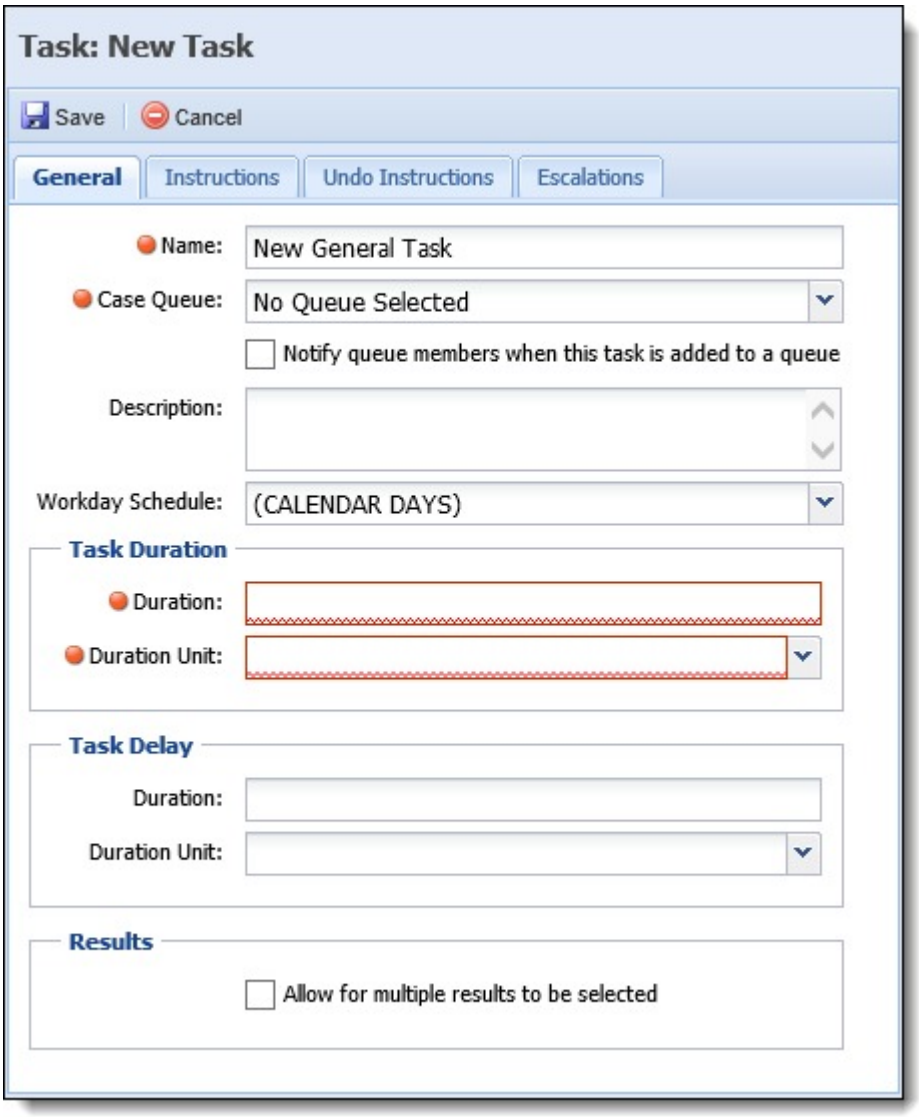
Custom case processes are built on the task tab using the interactive interface to add tasks, create dependencies, and define results. The tasks tab provides the ability to make complex case processes fast and easy.

Adding Tasks

To build a case process, right-click anywhere within the Tasks tab to display a list of task types available to create and add to a case process. Select a task type from the list.



The Task Editor screen appears. Navigate through the tabs and assign attributes to the task.



For more information about tasks and their attributes, see the Task Types topic in this guide.

When finished assigning attributes click Save. The new task populates within the Tasks tab.

Once a task is added to a case process, the task may be moved by clicking the task and dragging it to the desired location in the screen.

Editing a Task

- To edit a task, double-click within the task tile in the case process. The Task Editor appears.
- Navigate through the tabs making updates to the necessary attributes.
- When finished, click Save to return to the case process.
- Click Cancel to disregard any changes and return to the case process.

Deleting a Task

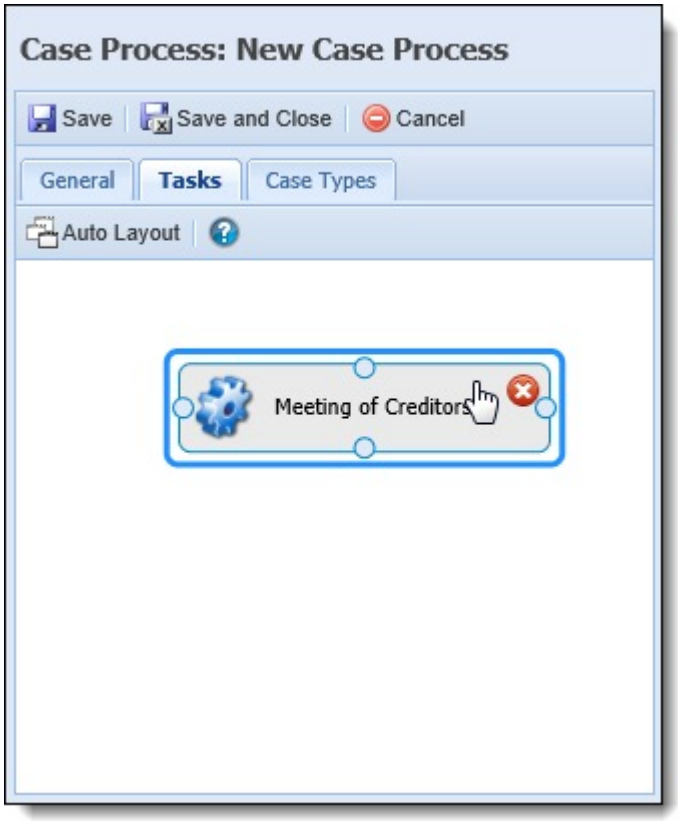
- To delete a task, click within the task tile in the case process. A confirmation message appears.
- Click **Yes** to delete the task and return to the case process.
- Click **No** to disregard and return to the case process.

Creating Dependencies

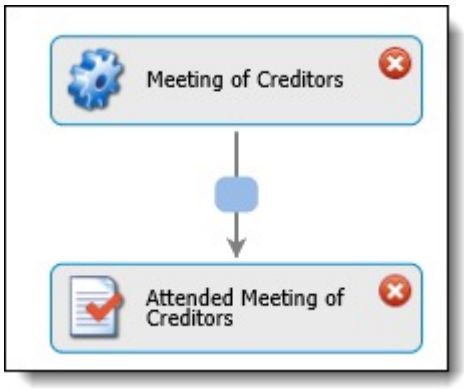
When multiple tasks are included in the process, they can be linked to create a dependency.

To link the tasks:

- Hover over a task to display the connection points of the task.



- Click on a connection point and drag the mouse to the result task that is to be dependent based on the completion of the first task. An arrow link is formed that represents the flow of the process.



The Attended Meeting of Creditors task is dependent on the Meeting of Creditors task and does not start until the Meeting of Creditors is completed.

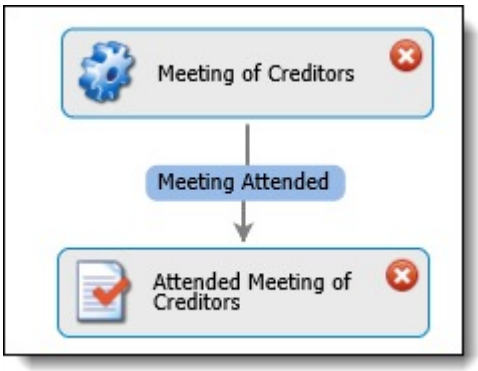
> A task can be dependent on multiple tasks. In this case, the task does not start until all dependent tasks have been completed.

- Any task in a process that is not dependent on another task is a startup task, and is available within the task tree when a case is opened. There is no limit as to how many start up tasks can be in a case process.

> If a delay has been assigned to a startup task it displays as a Waiting to Start task. If there is no delay, the task displays as an In Progress task. For more information on task statuses, please see the Task Statuses topic in the End-User guide.

Defining Results

Once tasks are linked, a result can be defined by typing the result in the blue text box on the link. The result creates a conditional dependency; therefore, a task is only eligible to be worked if a dependent task is completed with the result defined in the dependency.



> The results in the blue textbox are results available to the user to select from when completing a task. When a result is selected, the task associated with it becomes In Progress in the case.

Processes can be configured to allow a single task to have multiple resulting tasks based on the different results. For example, in an Auto Repossession case, if a car is auctioned off, the Auction task may need to result in a deficiency recovery task or a surplus payment task, depending on how much the car sells for. In this situation, a task can link to multiple tasks with a different conditional dependency defined for each result.

When configuring the task, an administrator has the option to allow for one or multiple results to be selected. This can drive the process down multiple paths.

- **Single Result** - If only a single result is allowed, users are presented with radio buttons to select the desired result.
- **Multiple Results** - If multiple results are allowed, users are presented with check boxes to select the desired results.

Example

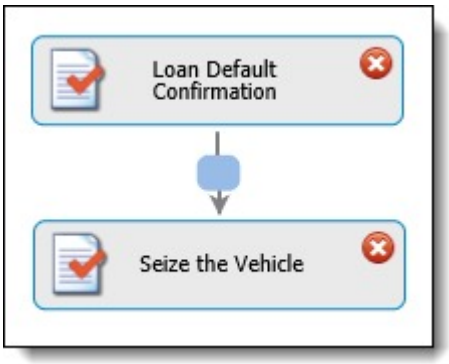
To illustrate how a case process is configured, please see the below example.

The following depicts an auto repossession case process. The administrator must configure a case process to complete the below tasks:

1. Verify the Loan has defaulted.
2. Seize the Vehicle.
3. Determine the fate of the vehicle: whether it is to be kept as payment, sold at auction, or to reinstate the loan for the account holder.
4. Once the fate of the vehicle is determined, the below tasks must be completed:
    - Return the Vehicle (only if the loan is reinstated)
    - Return Personal Property
    - Provide Surplus Payment or Recover Deficiency

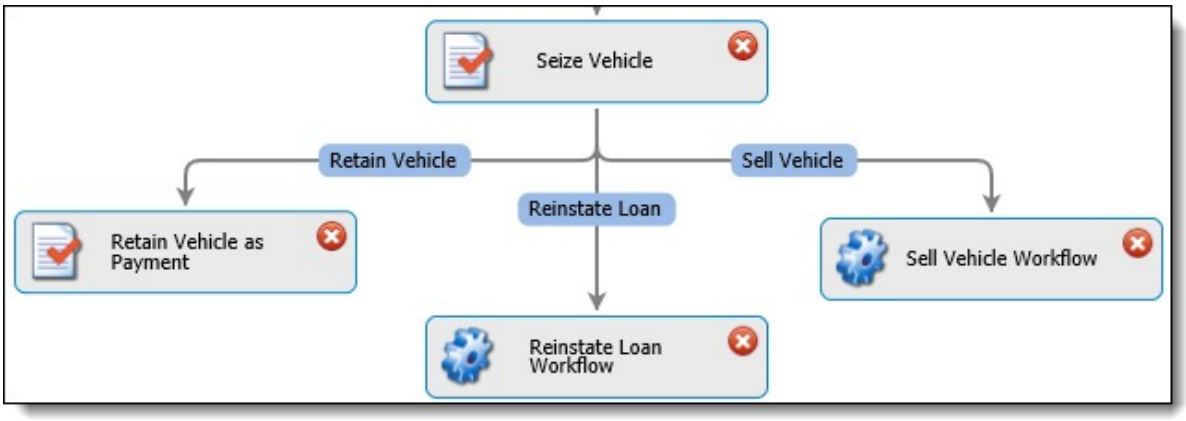
The tasks attribute of case processes makes building a complex process, such as the above, simple.

Once the defaulted loan has been verified, the next task is to seize the vehicle. Because seizing the vehicle is the only result after confirmation of a default, a conditional dependency is not required.

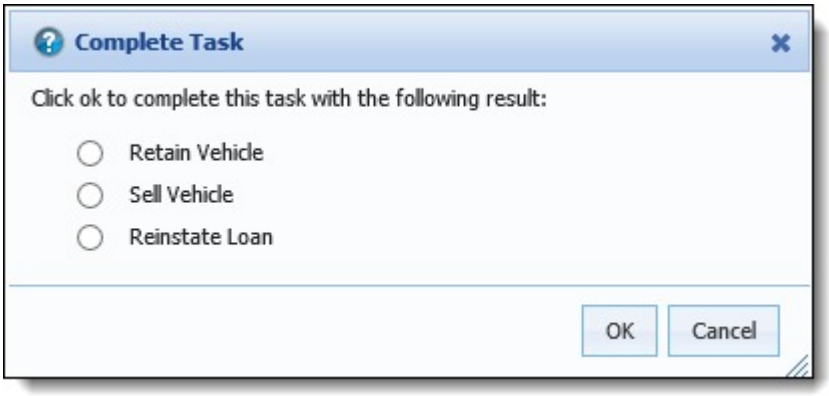


The administrator configures the process that determines what to do after the vehicle is seized, Retain the Vehicle, Reinstate the Loan, or Sell the Vehicle.

This is accomplished by creating conditional dependencies based on the completion of Seizing the Vehicle. By inserting results into the blue text boxes, an administrator can configure one task to have multiple results to select from while completing the task.



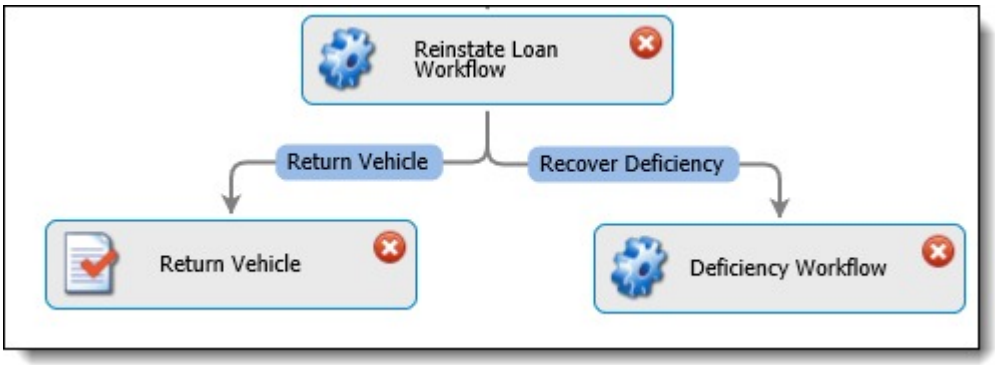
In this example, only one of the results can be selected by the end user when they complete the Seize Vehicle task.



> Tasks can be configured to allow users to select one or multiple results. There is no limit as to how many dependent tasks can be linked to a single task.

A task can produce multiple results. If there is no dependency between results, the resulting tasks can be completed simultaneously.

In the Auto Repossession case process, the Reinstate Loan Workflow results in the return of the vehicle to the account holder, and, if necessary, a deficiency recovery workflow.

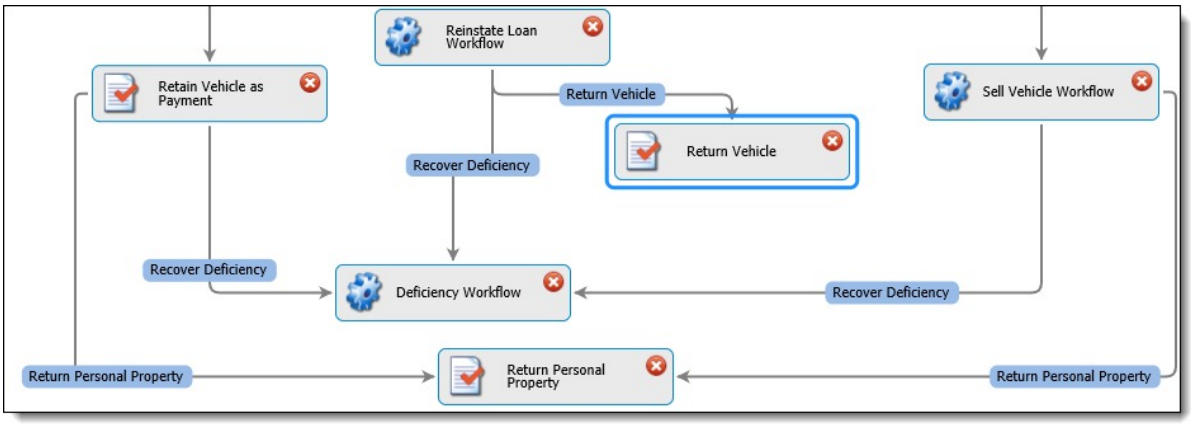


> To reduce the number of tasks in a process, a single task can be used as a result for multiple tasks.

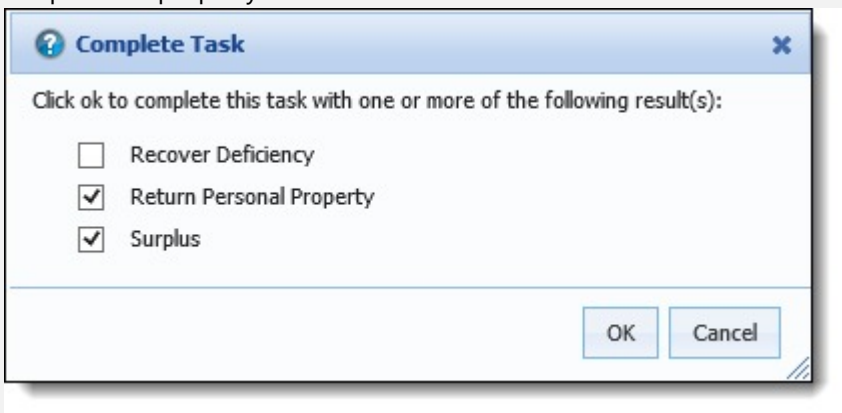
Continuing the auto repossession example, if an institution decides to retain the vehicle as payment

or sell the vehicle, the institution needs to return the account holder's personal property that was in the vehicle and potentially recover a deficiency payment.

Only a return personal property task needs to be configured because a deficiency workflow task already exists. The retain vehicle and sell vehicle tasks can be linked to both the return personal property task and the deficiency workflow tasks as shown below.



If the vehicle is sold, a surplus workflow may be needed instead of a deficiency workflow.When completing the sell vehicle workflow, users have to select a deficiency or surplus, and to return the personal property.



When finished entering all the information, click Save and Close to save the new case process and return to the Case Processes page. The new case process populates in the grid and can be worked by users with the appropriate permissions while working associated Case Types.

Useful tips to use while building a case process:

- **Auto Layout**: Clicking Auto Layout optimizes the layout of the tasks within the Tasks tab.
- **Resize Process**: Administrators can resize the case process by holding **ctrl** on the keyboard and scrolling the mouse scroll wheel. This allows larger case processes to be fully visible in the screen.
- **Moving Links**: After a link is formed, click the link to activate it. The link is highlighted blue and contains on the link. Click on and drag to reposition the link.

Copying a Case Process

The Copy function enables administrators to duplicate the structure of an existing Case Process. The existing Case

Process can be used as a base for creating a new Case Process.

- Highlight the process that is to be copied and click Copy.
- The Copy Case Process screen appears. Navigate through all of the tabs and make any necessary changes to the task process.
- When finished entering all information, click Save and Close to save the new process and return to the Case Processes page. The new process is now listed in the grid and available to be run by users when working a case. Click **Cancel** to return to the Case Process page without saving the case process.

Editing a Case Process

The Edit function enables administrators to revisit existing case processes and edit the attributes assigned to them.

- Highlight the process that is to be edited and click Edit.
- The Edit Case Process screen appears. Navigate through all of the tabs and make any necessary changes to the case process.
- When finished entering in all information, click Save and Close to save the process and return to the Cask Processes page. Click **Cancel** to return without saving.

Deleting a Case Process

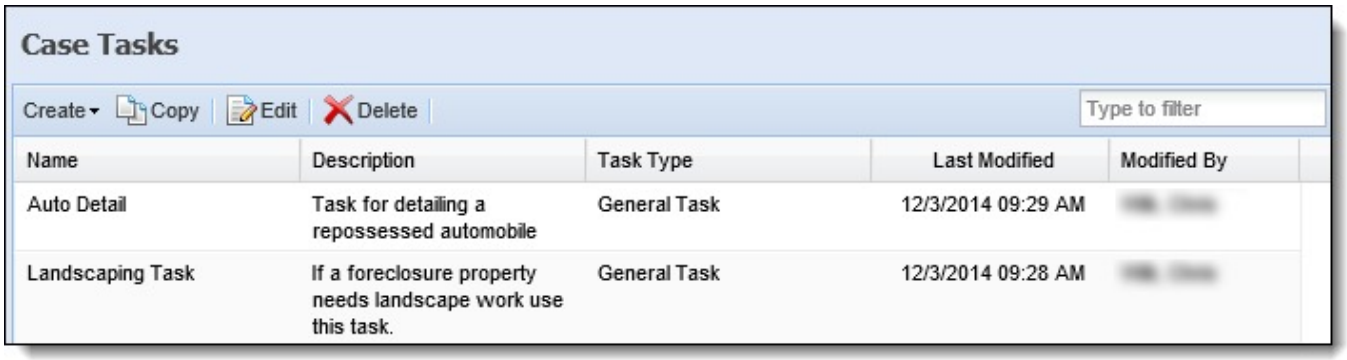
- Highlight the process that is to be deleted and click Delete.
- A confirmation message appears.
- Click **Yes** to delete the case process. Click **No** to return to the Case Processes page without deleting the case process.

Case Tasks

Case tasks are individual tasks created to be added to cases that are in progress. Case tasks can be included in a case without being part of an existing case process.

For example, in a foreclosure case, property maintenance is needed monthly for the duration of the time that an institution controls the property. A property maintenance case task can be configured to allow users to add the task every month to keep track of each month's maintenance individually.

By navigating to the System Management > Collections > Case Tasks page administrators can manage existing case tasks and create new case tasks.



The following columns display on the Case Tasks page in System Management:

Column Name	Description
Name	The name of the Case Task.
Description	If provided, displays a description of the Case Task.
Task Type	Denotes the task type of the Case Task.
Last Modified	Denotes when the last modification was made to the Case Task.
Modified By	Denotes who made the last modification to the Case Task.

The following list contains task attributes defined in the task type configuration processes:

- General
- Instructions
- Undo Instructions
- Escalation
- Execute Code
- Execute Rules
- Screen
- Workflow

There are five different task types available within the module.

Task Type	Description
Execute Code	This task type is used to run custom code that integrates with the API to update an external system. For assistance creating custom code in the API, contact your Temenos Customer Care Representative.
Execute Rules	This task type is used to execute business rules.
General	This task type displays general information in a task.
Screen	This task type is used to display a screen. New screens can be created while configuring a Screen Task.
Workflow	This task type provides the ability to run a workflow in a task.

Each Task Type has unique business functions providing the ability to customize individual cases.

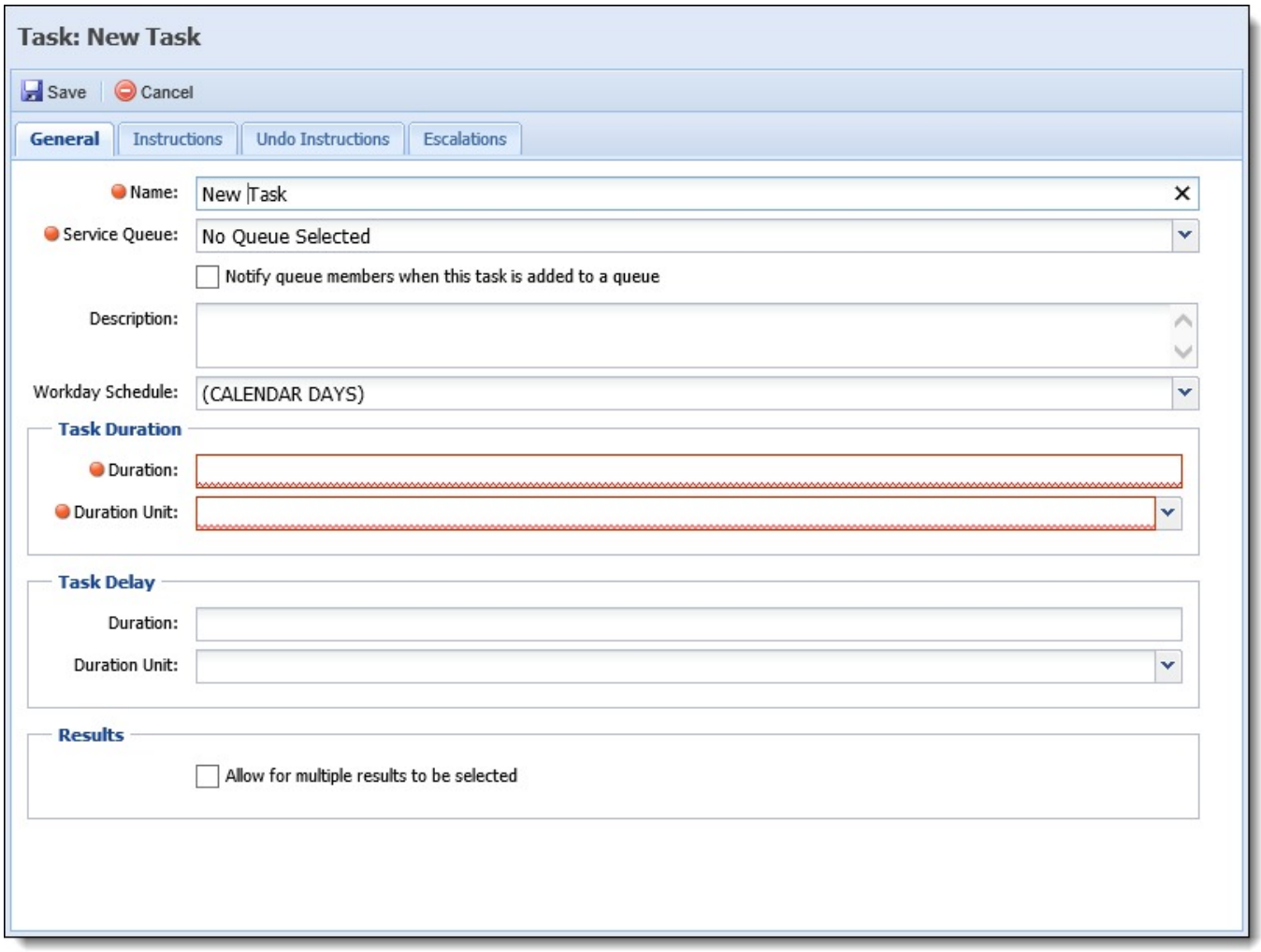
For example, an account holder can reinstate a loan during a Repossession Case. To quickly reinstate a loan an institution can allow users to run a Reinstate Loan workflow in a task. To update this information on the core, administrators can use an Execute Code task that runs automatically to update the core without user interaction.

Task Type Attributes

All task types share common attributes that are defined while creating or editing a task.

> All task types, with the exception of the General task type, have specific attributes that are located on a tab named the same as the task type.

General



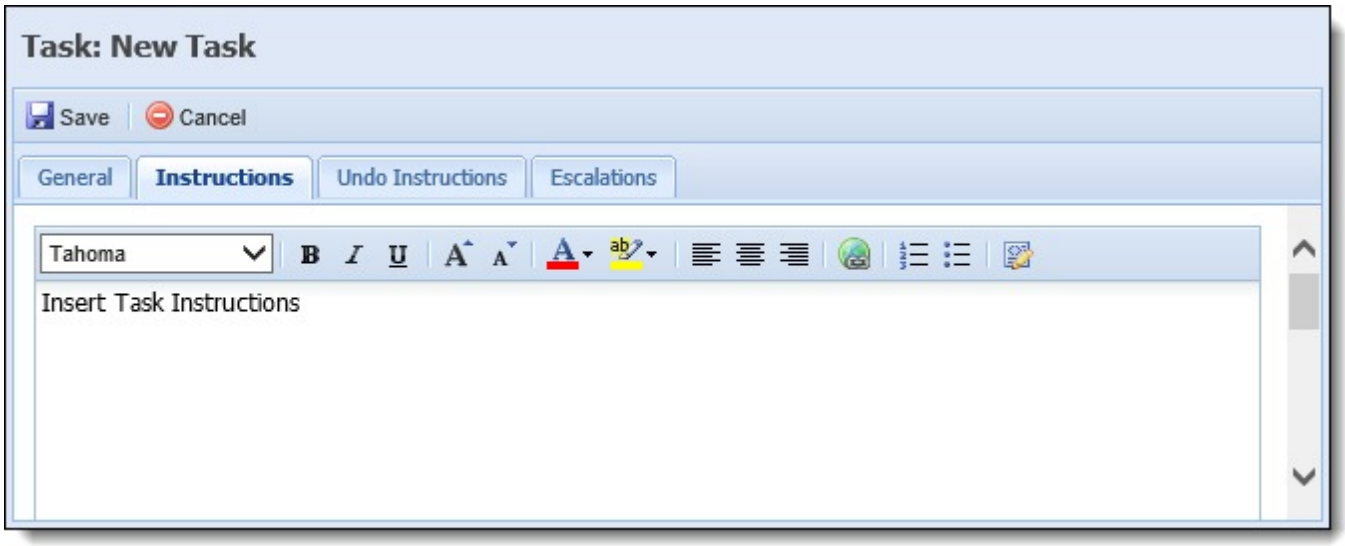
General attributes provide basic information for a task and are located within the general tab:

Attributes	Description
Name	Provide a name for the task. This is a required field. The task name can be changed by double-clicking the name of a task tile in the case process.

Case Queue	Assign a case queue to a task for specific users and departments to work the task. Selecting a case queue from the drop-down list. Once the task is active, it is assigned to this case queue. This is a required field. Queuing a task is required in order to track that all created tasks are addressed by a user. A system-defined Default Queue is included in the drop-down as an option to queue common tasks for all users. A task's queuing history is captured for Service-level Agreement (SLA's) reporting.
Notify queue members when this task is added to a queue.	Select this check box to send an email notification to users that have access to a queue, when a task enters that queue.
Description	Provide a brief description of the purpose and use of the task. The description is displayed to end users on the Summary tab of a task, as well as the Case Tasks page in System Management.
Workday Schedule	Assign a workday schedule, by default the workday schedule is Calendar Days. This can be overridden by selecting the workday schedule from the drop-down list. The workday schedule is used to start delayed tasks in a case process, to calculate Task Escalation, as well as task duration for SLA reporting.
Task Duration	Define the expected duration for the task to be completed using whole numbers. This is a required field. This value can be used for various purposes including SLA's reporting. Select the Duration Unit: • **Minutes:** Defined as 60 seconds. • **Hours:** Defined as 60 minutes. • **Days:** Defined as 24 hours. • **Week:** Defined as 7 days. • **Month:** Not all months have the same number of days; therefore, a month is calculated as 4 weeks and adheres to the workday schedule assigned to the task.

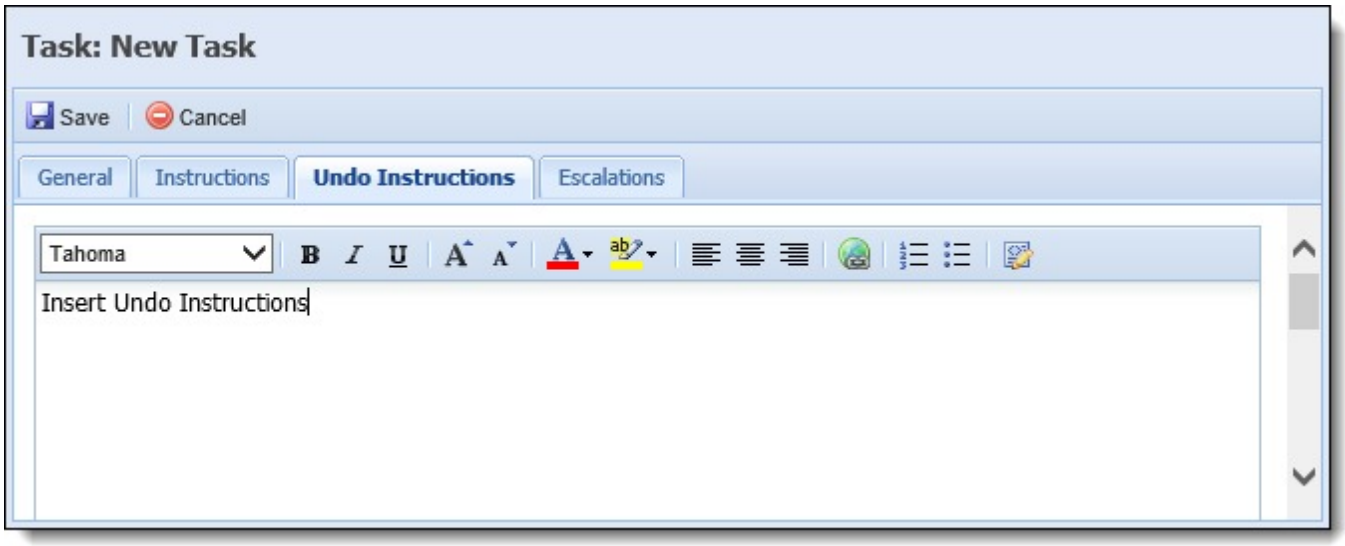
Task Delay	A task delay is used to start a task after a specified delayed period. For example, while wiring funds an institution allows 30 days for an account holder to return a signed wire transfer form. The administrator configures a Wire Transfer Confirmation task to have a delay of 30 days to allow the account holder enough time to return the forms. Define the duration of the delay using whole numbers and select the Duration Unit: • **Minutes:** Defined as 60 seconds. • **Hours:** Defined as 60 minutes. • **Days:** Defined as 24 hours. • **Week:** Defined as 7 days. • **Month:** Not all months have the same number of days, therefore a month is calculated as 4 weeks and adheres to the workday schedule assigned to the task. If a task is delayed, the queuing and escalation process of a task does not start until the end of the delay period.
Results	Administrators allow tasks to have more than one result by selecting the **Allow for multiple results to be selected** check box. If results are defined, the user must select the result(s) while completing the task. Results can be evaluated in business rules and code to determine what additional or remaining work is required to complete a service request. Multiple Results allow a case process to follow multiple paths. For more information, see the Case Process section of this guide.

Instructions



The Instructions attribute is used to provide clear instructions to the end-user explaining what work must be accomplished to complete this Task.

Undo Instructions



The Undo Instructions attribute is used to provide clear instructions to the end-user explaining what actions must be taken when a task status is undone.

> All task types must be completed manually when they are undone. Since users do not work automated tasks, such as Execute Code tasks, undo instructions on how to complete them manually are essential.

Escalation

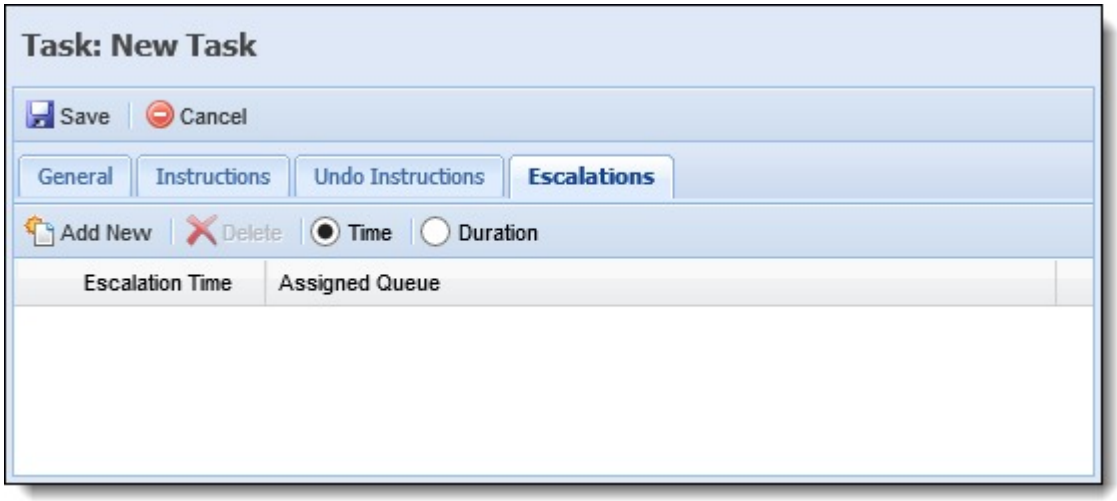
Task Escalation is a rule based attribute that aids in assuring that SLA's are met.

A task can be assigned an escalation process that can be made up of one or more levels. Each task escalation level associates a time value and case queue to a task.

Tasks escalate by moving to the assigned queues at the associated times. Times adhere to the Workday Schedule that is assigned to the task and are defined in one of two types: Time or Duration.

> If an Escalation Schedule is assigned to a task, the task begins escalation once it has been created in the ticket regardless of the task status. The only time a task does not escalate is while the person assigned to the ticket is in context. Once the person is no longer in context, the task resumes escalation.

Use the Escalation Tab to create an escalation schedule for a task.

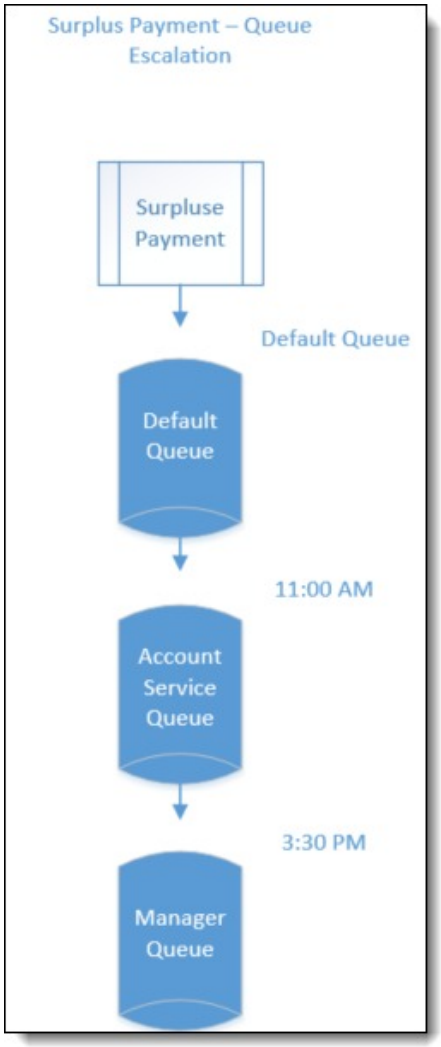


All levels within a single Task Escalation process can only use one time format, either Time or Duration. When changing between Escalation Types a message appears warning administrators that previous Escalation settings are lost if they continue.

Time Type

Time type escalation uses an absolute time method to escalate tasks. Administrators select this escalation type when a task needs to be completed by a specific time in a workday.

The below example uses a Time type escalation and a workday schedule with a start time of 9:00 am and end time of 5:00 pm.



Surplus Payment task is created to have a default queue and 2 levels of escalation.

1. An "Auto Repossession" case, containing the Surplus Payment task, is created at 9:30 AM. The task is placed into the Default Queue.
   - At 11:00 AM, the escalation process moves the task to the Account Service Queue. At 3:30 PM, the escalation process moves the task to the Manager Queue.
   - The task remains in Manager Queue until it is completed.
2. If a case containing the Surplus Payment task is created at 4:00 PM, the task escalates directly to the Manager Queue.

   This occurs because 4:00 PM is within the Workday schedule start and end time but after both escalation levels time settings.
3. If a case containing the Surplus Payment task is created at 5:30 PM, the task is placed in the Default Queue and escalates to the Account Service Queue at 11:00 AM the following morning.

   Since the 5:30 PM start time is outside the workday schedule, the escalation process begins at 9:00 AM the following morning.

To set escalation times using Time type, select the Time radio button in the Escalation tab toolbar.

Field	Description
Escalation Time	Enter the Time using absolute time values such as 10:00, 11:15, and 3:45. Also, from the drop-down select A.M. or P.M.

Assigned Queue	Enter the task queue for the escalation level.

Building a Time Escalation Schedule:

While building a Time Escalation Schedule administrators can add or delete levels of escalation.

To add an escalation level to a task:

- Click Add New to populate a new escalation level.
- Assign an Escalation Time and Queue to the escalation level from the drop-downs.

> When escalation level attributes are updated, the changes must be saved or canceled. If the administrator attempts to continue without saving or canceling, an error message is received.

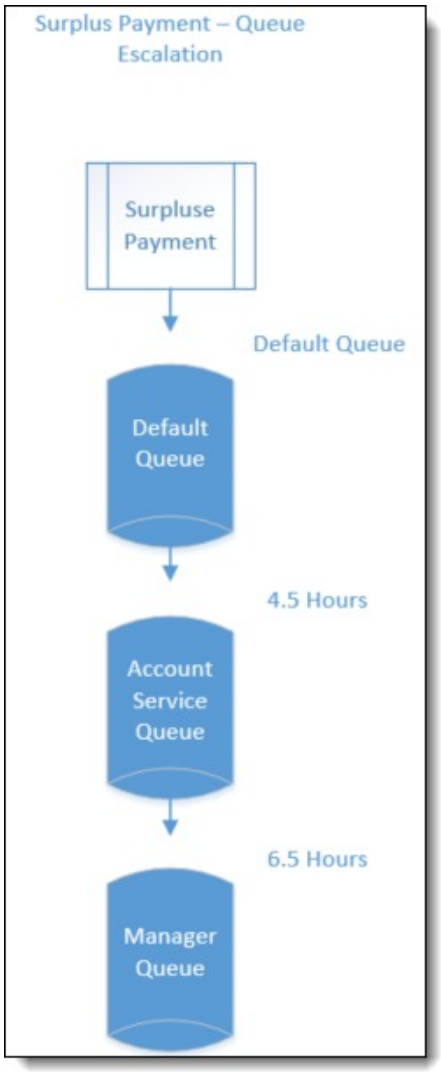
To remove an escalation level from a task select the level and click Delete.

> When multiple escalation levels are added to the Escalation Schedule, they automatically sort (from top to bottom) in the order of escalation based on the Escalation time assigned.

Duration Type

Duration type escalation times use a relative time method to escalate tasks. Administrators select this escalation type when a task needs to be completed within an allotted amount of time from when it is created.

The below example uses a Duration type escalation and a workday schedule with a start time of 9:00 AM and end time of 5:00 PM.



A Surplus Payment task is created to have 2 levels of escalation.

1. A case containing the Surplus Payment task is created at 9:30 AM and the task is placed into the Default Queue.
   - Four and a half hours after the task is created, the task is escalated to the Account Service Queue at 2:00 PM.
   - The task is escalated to the Manager Queue at 4:00 PM, two hours after it has entered the Account Service Queue.
   - The task remains in the Manager Queue until it is completed.
2. If a case containing the Surplus Payment task is created at 4:30 PM, the task is placed in the Default Queue and escalates to the Account Service Queue at 1:00 PM the following workday.

   Adhering to the workday schedule, the escalation process begins and runs until 5:00 PM on the start date. This process resumes escalation at 9:00 AM the following workday.
3. If a case, containing the Surplus Payment task is created at 5:30 PM, the task is placed in the Default Queue and escalates to the Account Service Queue at 12:30 PM the following workday.

   Since 5:30 PM is outside of the defined workday, 9:00 AM to 5:00 PM, the escalation process starts at 9:00 AM the following workday.

To set escalation times in Duration type, select the Duration radio button on the Escalation tab.

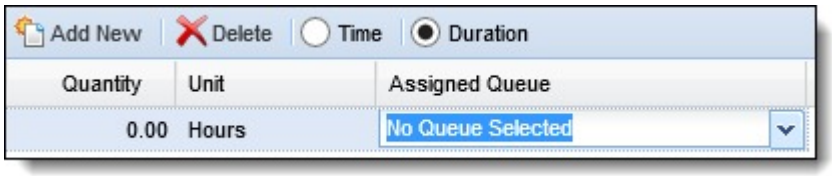
Field	Description
Quantity	Enter the Time using whole numbers for hours and decimals for minutes. Please see below for some examples: **Time** — **Description** 0.25 — 15 minutes 1.5 — 1 hour and 30 minutes 2.75 — 2 hours and 45 minutes 3 — 3 hours
Unit	Displays the unit of measurement for the quantity. Duration escalation is always set in hours.
Assigned Queue	Enter the Service queue for the escalation level.

Building a Duration Escalation Schedule:

While building a Duration Escalation Schedule, administrators can add or delete levels of escalation.

To add an escalation level to a task:

- Click Add New to populate a new escalation level.
- Assign a Quantity and Queue to the escalation level.



> Quantity is calculated as the total time elapsed from the creation of a task. In the above example, the Surplus Payment task spends two hours in the Account Service Queue before escalating to the Manager queue because the difference between the total time to reach the Manager Queue (6.5 hours) and the Account Service Queue (4.5 hours) is 2 hours.

- Click **Save** to add the new escalation level. Click **Cancel** to discard the escalation level.

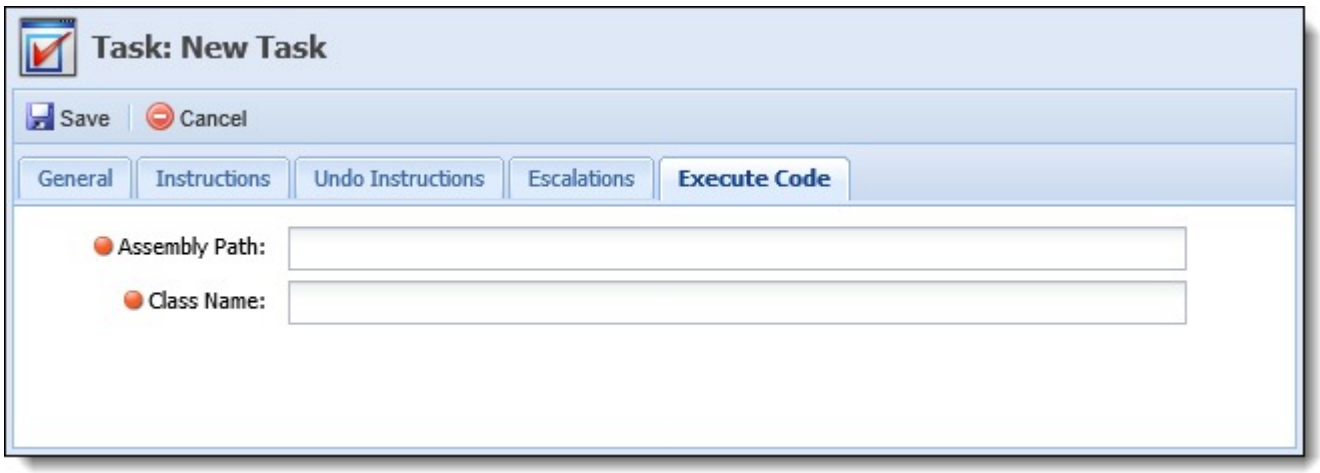
> When escalation level attributes are updated, the changes must be saved or canceled. If the administrator attempts to continue without saving or canceling, an error message is received.

To remove an escalation level from a task select the level and click Delete.

> When multiple escalation levels are added to the Escalation Schedule, they automatically sort (from top to bottom) in the order of escalation based on the Quantity of time.

Execute Code

The Execute Code task type is automated to run code that evaluates data and interact with systems outside the module. If the task is completed, results automatically activate the next task in the case.



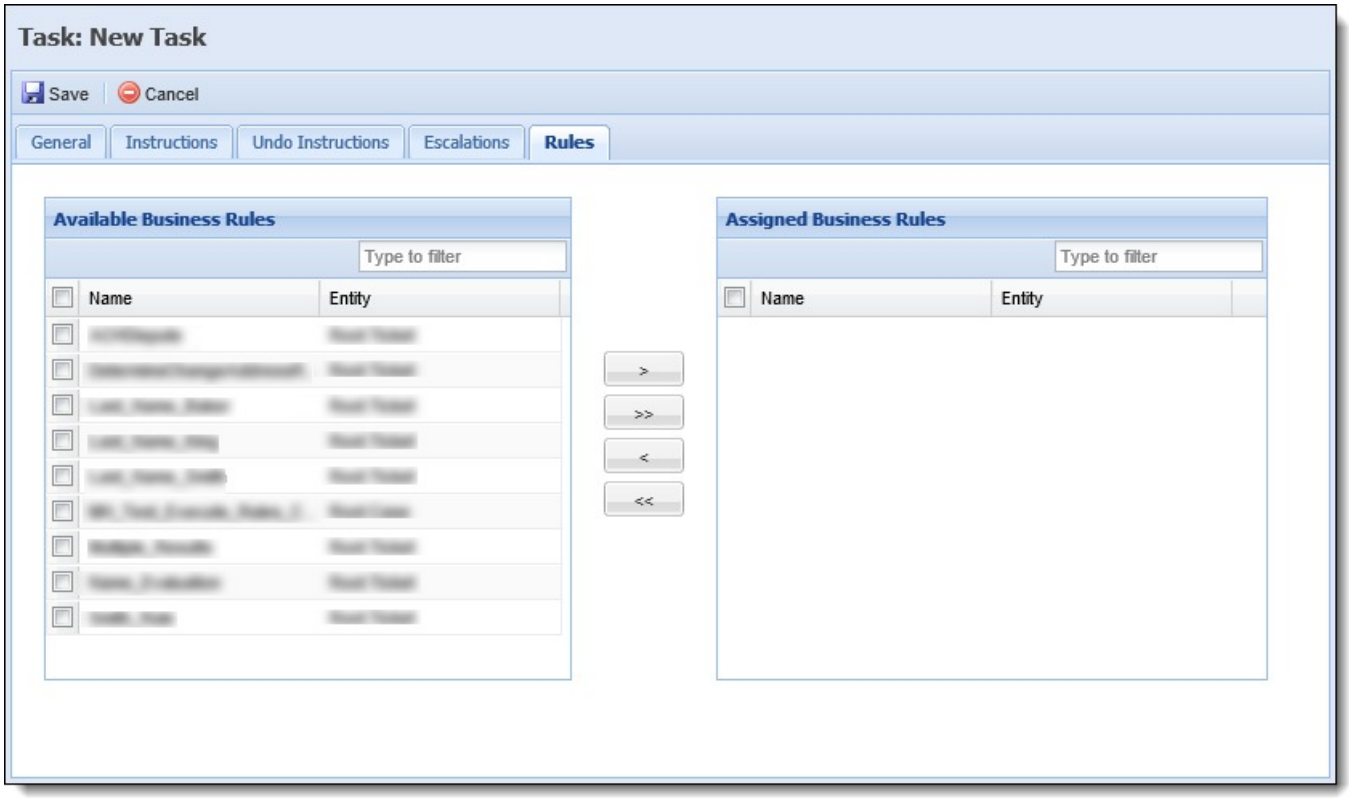
The Execute Code attributes displayed on the Execute Code Tab are Assembly Path and Class Name. Both of these attributes are required.

Attribute	Description

Assembly Path	Provide the assembly path of the custom code. This is provided by the developer that wrote the code.
Class Name	Provide the class name of the custom code. This is provided by the developer that wrote the code.

Rules

The Execute Rules task type is automated to apply business rules to analyze data at precise steps in a case process. The results returned by the assigned business rule(s) are used to drive users down different paths in a case process.



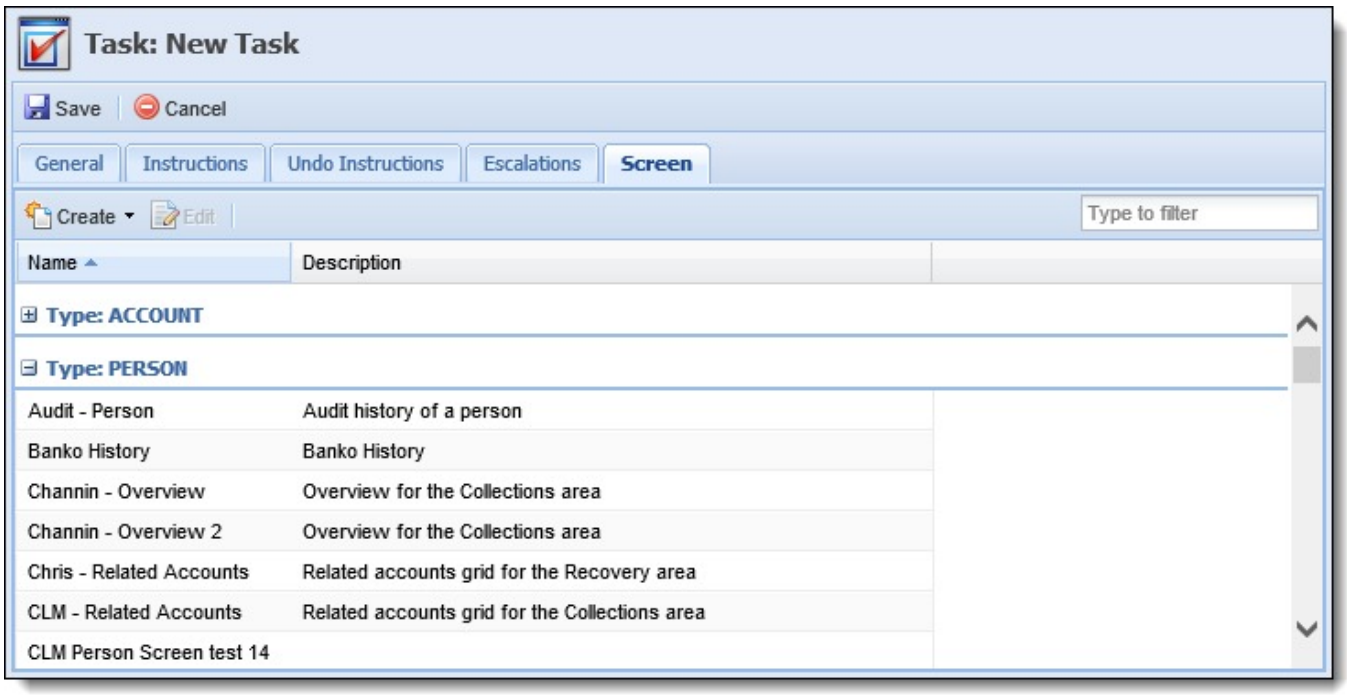
The Execute Rule attributes display on the Rules Tab:

Attribute	Description
Available	Displays a list of the Available Rules configured in System Management > Collections > Rules Manager. Assign a rule to evaluate by selecting the desired rule from the list and moving the rule to the Assigned Rules list using the arrows that are displayed. The Rule Manager can be opened from within the Rules tab by clicking Manage Rules in the toolbar. If a rule is created while in the Task Edit screen, clicking Refresh Rules displays the new rule.
Assigned	Displays a list of all rules that have been assigned to the task. Multiple rules can be assigned to a single task. All rules execute simultaneously

> Although an execute rule task can include multiple rules, it is recommended to configure a single rule to accomplish the desired task. This practice is beneficial for configuring rules and troubleshooting if there are any issues.

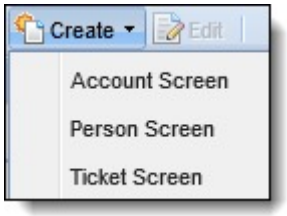
Screen

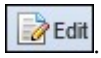
The Screen task type allows users to view and edit a screen in Temenos Infinity. Tasks such as filing for Bankruptcy can be completed in a screen task.



The Screens tab displays a grid with two fields Name and Description. These fields display the name and description that are provided to the screen when it is created. The grid organizes all Person, Account, and Case screens that are available in the system by type. Administrators must select the desired screen from the list or an error message appears when attempting to save the task.

From the Screens tab toolbar, administrators have the ability to create a new person, account, or ticket screen by selecting a screen type from the create drop-down.



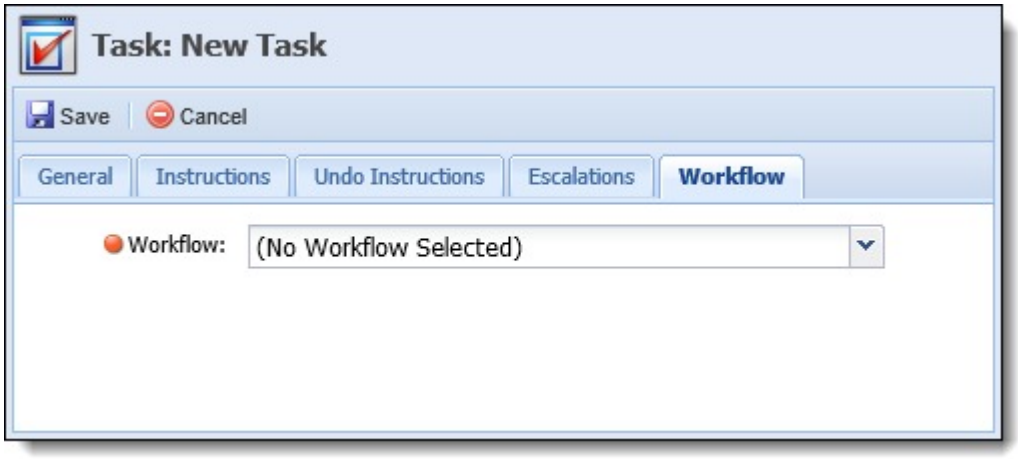
Administrators can also edit existing screens by selecting a screen from the list and clicking  .

> When a new screen is created through a task, it is available throughout the module the same as if it was created through the System Management > Screens page. For more information about creating and editing screens, please see the Screens topic of this guide.

Workflow

Workflows are step-by-step processes used to perform work on one or more accounts. The Workflow task

type provides the ability to run both automated and manual workflows within a case. For example, a deficiency payment workflow has multiple steps to complete the deficiency payment process. This process may need to be completed independently or it can be included in a case such as a "Auto Repossession" case.



The Workflow attribute includes a drop-down list of all workflows listed in alphabetical order. The first workflow in the list is pre-populated by default. Administrator must select a workflow or the default workflow is assigned to the task.

> Once a workflow is created it is included in the drop-down list. See the Workflow section of this guide for more information on creating a workflow.

Once all the neccessary attributes have been defined, click Save to save the task and return to the task process screen.

> Click Cancel to disgard changes to the task attributes and return to the tasks tab.

Creating a Case Task

The Create function enables administrators to configure a new task that can be added to a Case by a user.

- To create a new task, click Create, and select the desired task type of the new task.
- The Task Edit screen appears. Navigate through the tabs and assign attributes to the task.
- When finished assigning attributes click Save.
- The new task is populated in grid on the Case Task page.

Copying a Case Task

The Copy function enables administrators to duplicate the configuration of an existing Case Task. The existing screen can be used as a base for creating a new Case Task.

- To copy a case task, highlight the task that is to be copied and click Copy.
- The Task Edit screen appears. Navigate through the tabs and change any necessary attributes.
- When finished updating the case task attributes click Save to return to the Case Task page.
- The new task is populated in grid on the Case Task page.

Editing a Case Task

The Edit function enables users to revisit an existing case task and modify the current configuration.

- To edit a case task, highlight the task and click Edit.
- The Task Edit screen appears. Navigate through the tabs and make any necessary changes to the attributes
- When finished assigning attributes click Save to return to the Case Task page.

Deleting a Case Task

The Delete function enables administrators to remove case tasks.

- To delete a case task, select the desired task and click Delete
- A confirmation message appears.
- Click **Yes** to delete the case task. Click **No** to return to the Case Task page without deleting the task.

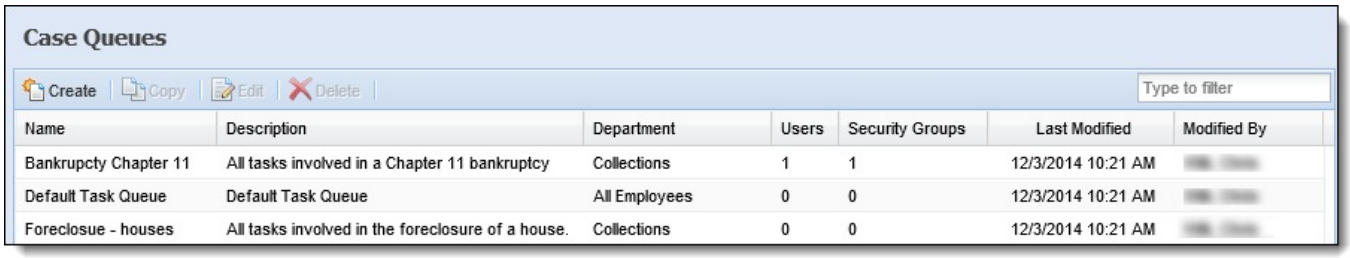
Case Queues

Case queues promote organization and management of service ticket tasks. Tasks are configured to be automatically assigned to a case queue when they are ready to be worked. Queuing facilitates:

- Specific tasks or functions to be worked by a specific group of resources through security settings.
- Management of aging tasks through the use of escalation.
- Visibility and management of tasks that are moved between resources before completion. The task queuing history is visible in a task's history tab in the workspace.

To access all case queues, navigate to System Management > Collection > Case Queues.

> While working a queue, the user works the first task in the queue to completion, then they are automatically directed to the remaining tasks in that ticket before getting the next task from the queue. Once all tasks within a single ticket that the user has access to are completed, the next task in the queue is retrieved.



The following columns display on the Case Queues page:

Column Name	Description
Name	The name of the Case Queue.
Description	The description of the Queue. This also appears to the end user accessing the queue.
Department	The department associated to the Case Queue.
Users	The number of users assigned to the Queue.
Security Groups	The number of security groups assigned to the Queue.

Last Modified	Denotes when the last modification was made to the Queue.
Modified By	Denotes who made the last modification to the Queue.

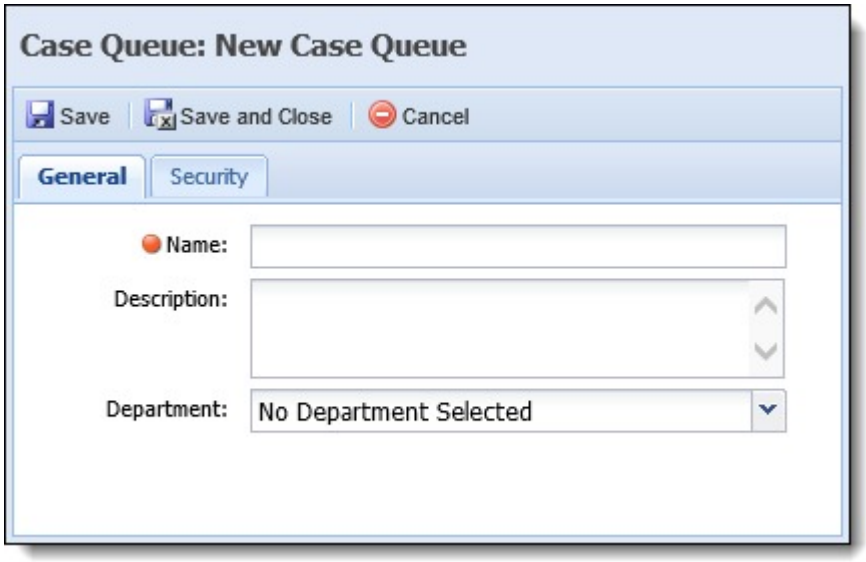
From the Case Queues page, administrators can create queues, copy queues, edit queues, and delete queues.

Queue Attributes

All case queues share common attributes that are defined while creating, copying, or editing a queue.

General

The general attributes include basic information pertaining to the case queue.

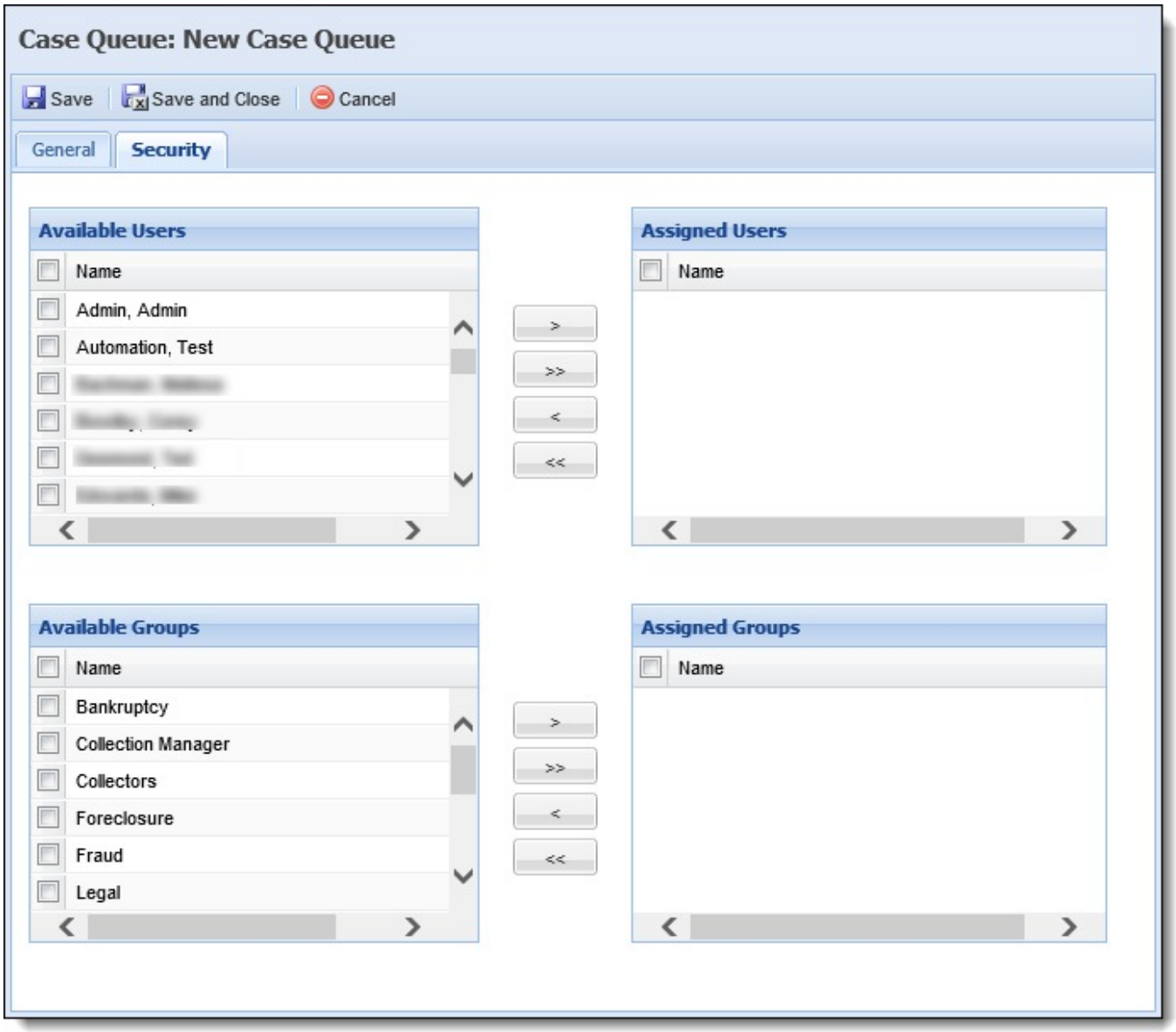


General attributes are located within the General Tab:

Attribute	Description
Name	Provide a unique name for the case queue. This is a required field.
Description	Provide details about the case queue. Although descriptions are not required, they appear within queues list to provide users with more detail when they work a case queue.
Department	Select a department from the drop-down; this is used for SLA reporting. No Department is pre-populated.

Security

Security attributes allow administrators to control which users and groups have access to work a case queue.



Security attributes are located within the Security Tab:

Attribute	Description
Assign Users	Select users from the Available Users list and move them to the Assigned Users to provide users access to the case queue from the Queues icon in the Ribbon Bar.
Assign Groups	Select groups from the Available Groups list and move them to the Assigned Groups to provide groups access to the case queue.

For information about assigning a task to a queue during configuration an assigning escalation schedules. Please see the Case Tasks topic in this guide.

Creating a Queue

The Create function enables administrators to create a new case queue.

To create a new Case Queue, click

.

The New Queue screen appears. Navigate through the General and Security tabs to update attributes.

When finished entering all the information, click Save and Close to create the new queue and return to the Case Queues page. The new case queue populates in the grid and can be worked by users with allocated permissions.

Copying a Queue

The Copy function enables administrators to copy an existing case queue. The copied queue can be used as the foundation for a new queue.

- Highlight the Case queue that is to be copied. Click Copy.
- The Copy Case Queue screen appears. Navigate through the tabs and make any necessary changes to the Case queue.
- When finished entering all the information, click Save and Close to save the new task queue and return to the Case Queues page. The new queue is now listed in the grid and available to be worked by users with appropriate permissions. Click Cancel to return without saving.

Editing a Queue

The Edit function enables administrators to edit an existing queue attributes.

- Highlight the queue that is to be edited. Click Edit.
- The Edit Queue Screen appears. Navigate through the tabs and make any necessary changes to the queue.
- When finished entering in all information, click Save and Close to save the queue and return to the Case Queues page. Click Cancel to return without saving.

Deleting a Queue

The Delete function enables administrators to remove an existing case queue.

- Highlight the queue that is to be deleted. Click Delete.
- A confirmation message appears.
- Click **Yes** to delete the task queue. Click **No** to return to the Case Queues page without deleting.

> Task Queues that have tasks still remaining in them cannot be deleted. Task Queues that also have a Case Type assigned to it cannot be deleted. Error messages appear if an attempt is made to delete a Task Queue with these features assigned to it.

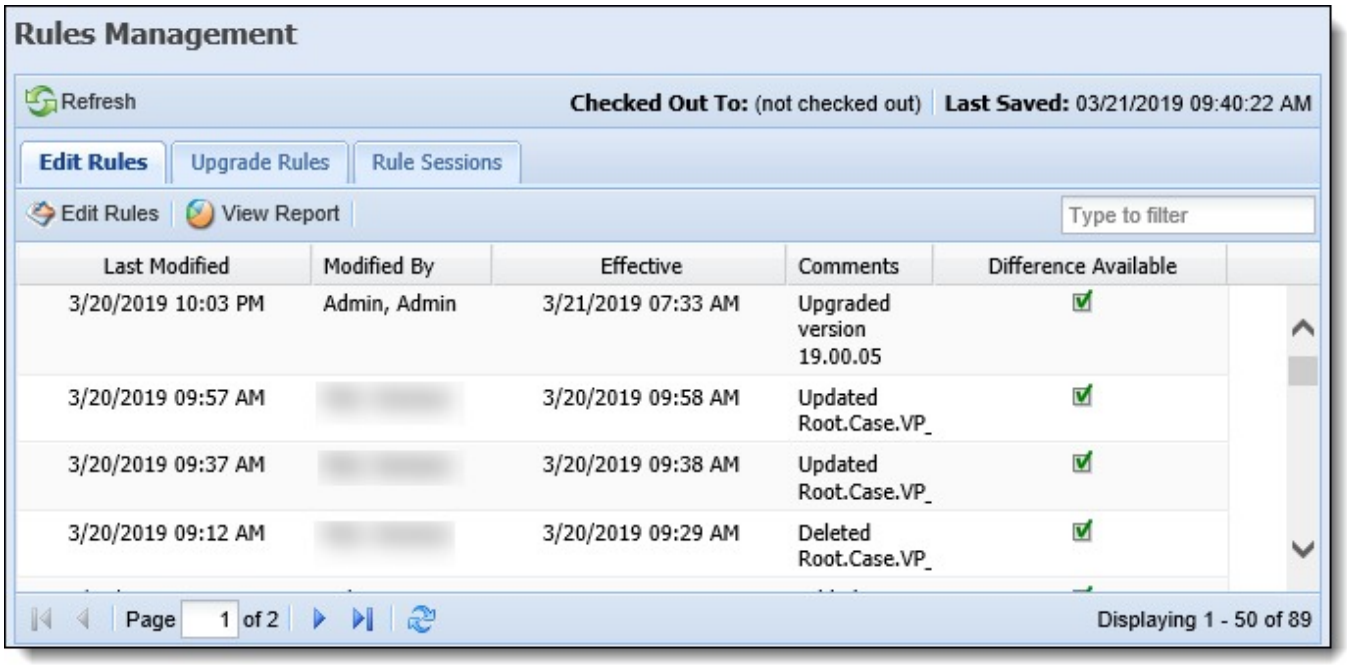
Welcome to Rules Management

Business Rules are a powerful mechanism for performing sophisticated data analysis, decisioning, and data updates. Account Servicing Business Rules can be integrated in many areas of the Collections module to perform activities such as advanced person and/or account queuing, automated decisioning in workflows, setting field values, and aggregating person and account data to display in the workspace. While the incorporation of Rules is not required to work in Temenos Infinity, they are available to make the Temenos Infinity experience more efficient and productive.

The use of Business Rules does require experience; therefore, Temenos Account Managers are available to facilitate an understanding for how to use rules as well as provide business rule packages and training options. For more information regarding the use of Account Servicing Business Rules in your institution, please contact a Temenos Customer Care Representative.

Rules Management Home Screen

Business Rules are created and managed in the Rules Management Application, which can be accessed from the Rules Management home screen in System Management > Collections > Rules Management.



At the top of the Rules Management home screen, institutions are able to:

- Refresh the Rules Management home screen.
- View if the rule application is currently checked-out to one or more users, as well as the date and time that the rule application was last saved.

  > If a user has an exclusive lock on the rule application, the Checked Out To label displays the first and last name of the user. If there are multiple rule sessions in progress, the label displays the total number of open sessions.

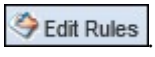
- View the date and time that the compiled rule application became current in Temenos Infinity.

The Rules Management home screen is organized into the following tabs:

- Edit Rules
- Upgrade Rules
- Rule Sessions

Edit Rules

Within the Edit Rules tab, users are able to launch Rules Management, and view the RuleApp Difference Report.

To launch rules management, click 

. The rule application opens in a new window.

> For more information on creating rules, see the Rule Authoring topic in this guide.

In addition to launching Rules Management, users are able to see an overview of the edits made to the rule application from the Edit Rules tab.

> For more information on viewing rule modifications, see the Rule Application Difference Report topic.

Upgrade Rules

The Upgrade Rules tab allows users to upgrade their institution's Rules Management application to a newer version.

> Unless instructed by a Temenos Customer Care Representative, Rules Management upgrades should only be performed as part of a pre-upgrade process. For more information on performing an upgrade to the Rules Management application, see the Upgrading Rules Management topic.

Rule Sessions

The Rule Sessions tab provides an overview of the active rule sessions in the Account Servicing rule application. From this tab, users are also able to end an active rule session.

> For more information, on this tab, please see the Rules Management - Rule Sessions topic in this guide.

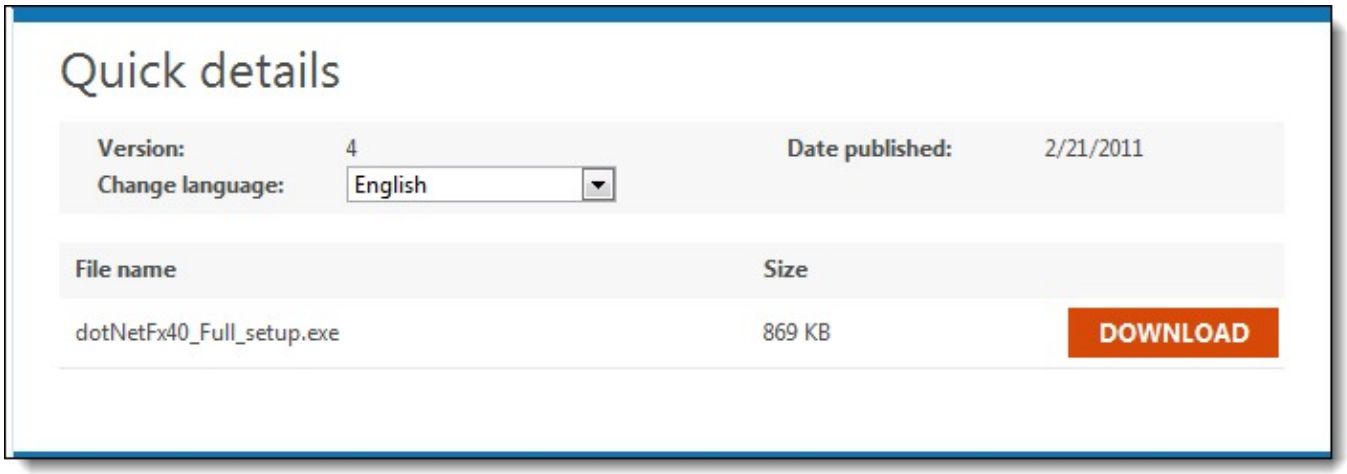
Installing Rules Management

Download Microsoft .NET Framework 4.0

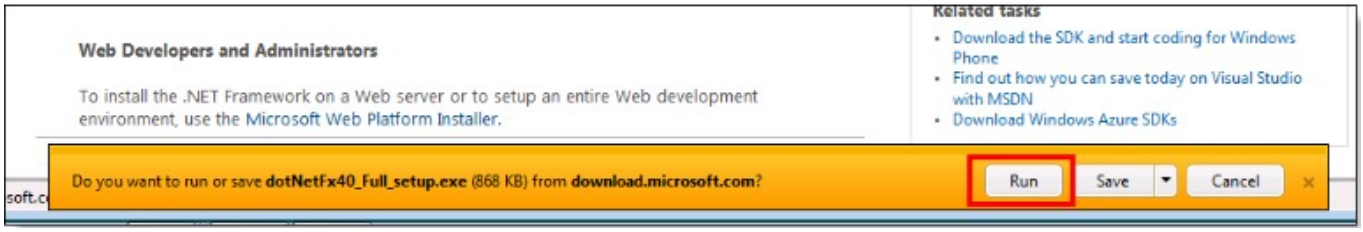
> The Rules Management application requires the installation of Microsoft .NET Framework 4.0; however, end users are not required to have this installed in order to use rules configured by the administrator. Follow the steps below to download the application.

Navigate to http://www.microsoft.com/en-us/download/details.aspx?id=17851.

Click **Download**.

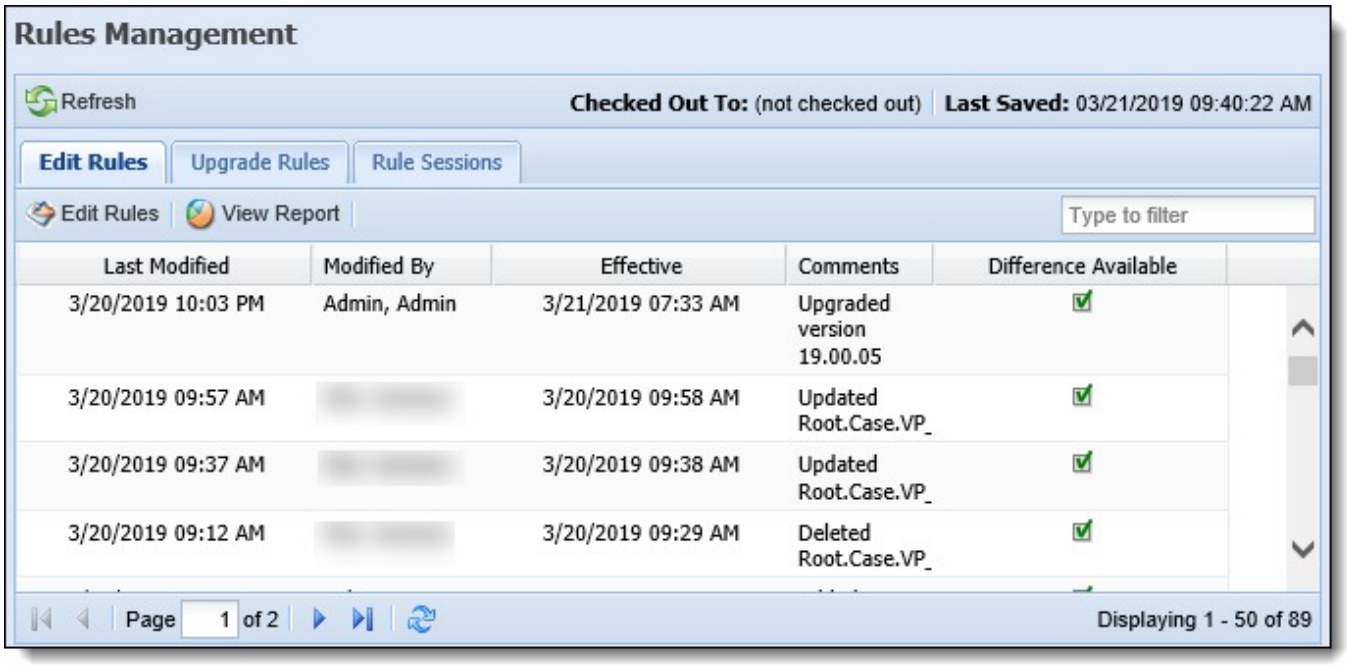


A message appears at the bottom of the screen. Click **Run** to begin the installation.



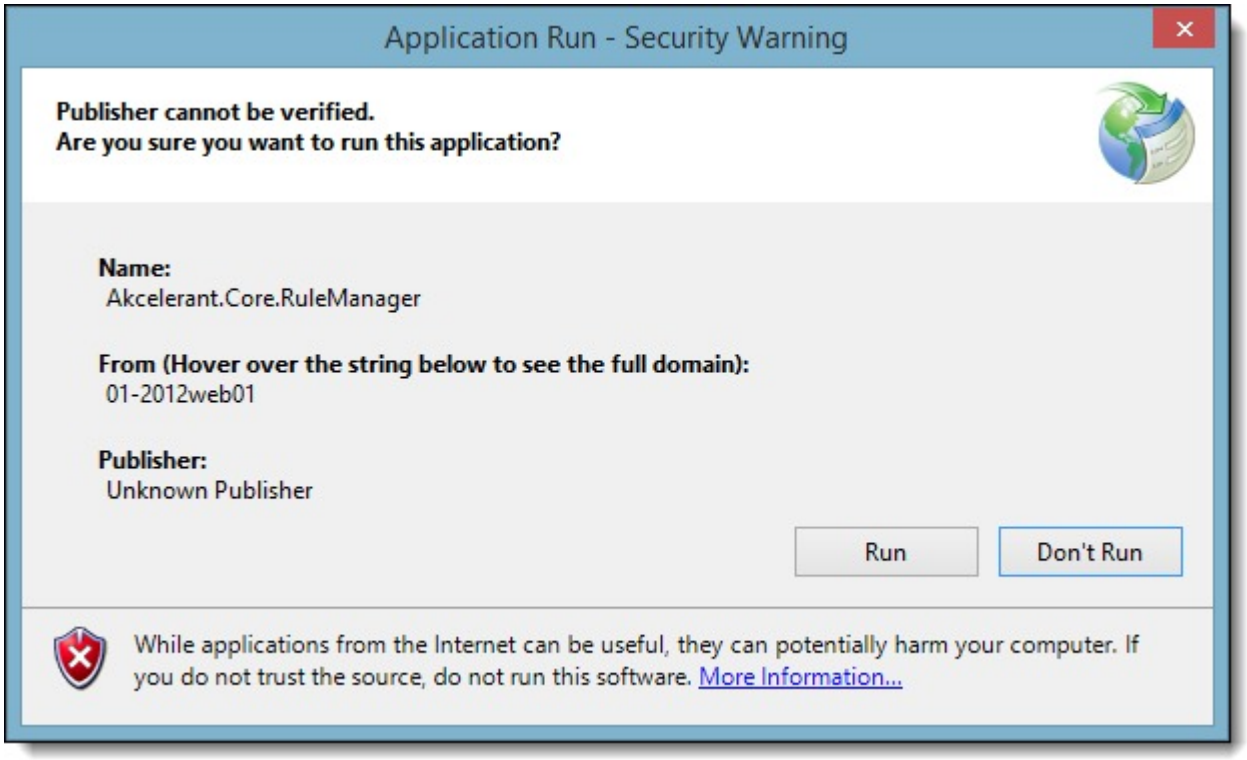
Download Rules Management

After Microsoft .NET Framework 4.0 is installed, follow all of the remaining steps to complete the installation of the Account Servicing Rules Management Application. Once the installation is complete, click Edit Rules.



> If rule authoring is not enabled, the Rules Management Application cannot be opened and an error message is received upon selecting Edit Rules. To discuss options for enabling Account Servicing Rule Authoring, please contact your Temenos Customer Care Representative.

An Application Install-Security Warning message displays. Click **Run** to continue the installation.



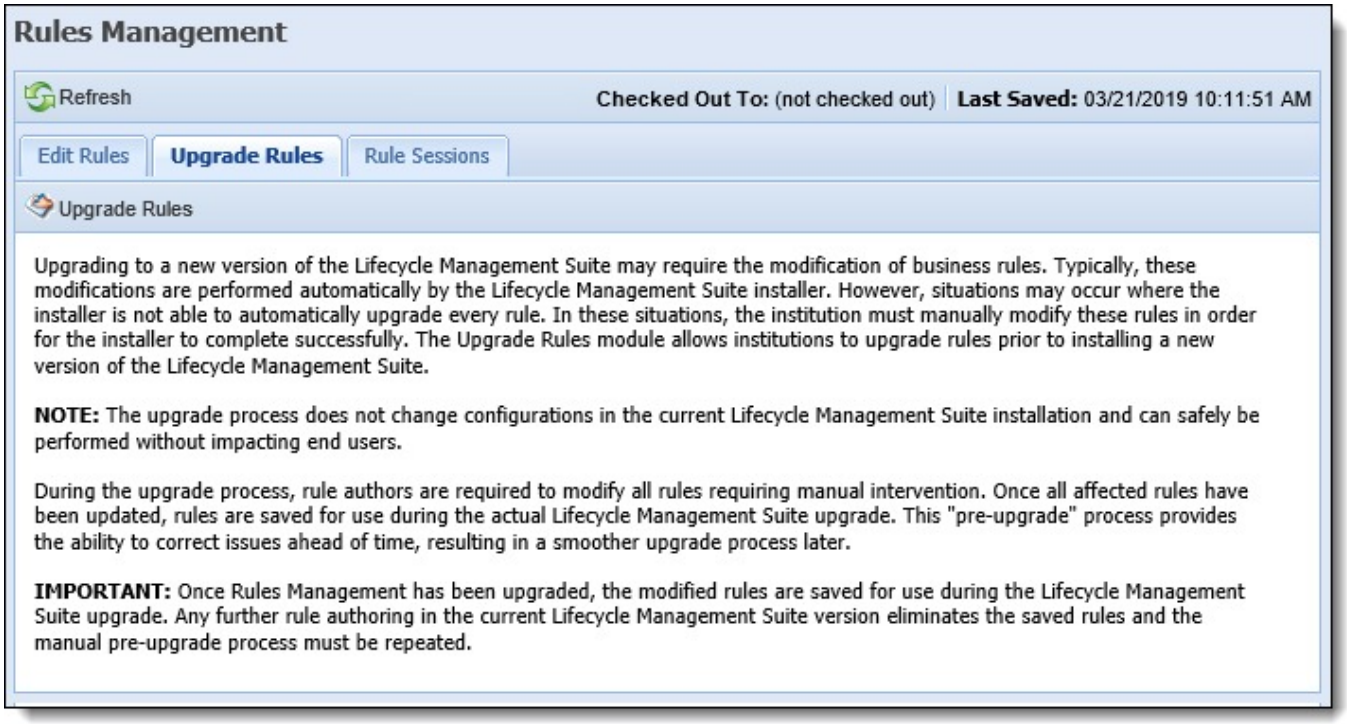
Once the installation is complete, the Rules Management Application opens.

> For an overview of the Account Servicing Rules Management Application, please see the Getting Started with Rules Management topic within this Guide.

Rules Management - Upgrading Rules Management

From the Rules Management Home Screen, institutions are able to upgrade their rule application to a newer version prior to upgrading to a newer version of Temenos Infinity. The rule upgrade process enables institutions to proactively address any necessary rule changes that might be identified during a system upgrade.

> To determine if an upgrade requires modifications of business rules, refer to the Important Upgrade Information section within the Temenos Infinity Release Notes document. Rules Management upgrades should only be performed as part of a pre-upgrade process.



Upgrade Process

Within the Upgrade Rules tab located on the launch screen, click Upgrade Rules to proceed with the rule application upgrade.

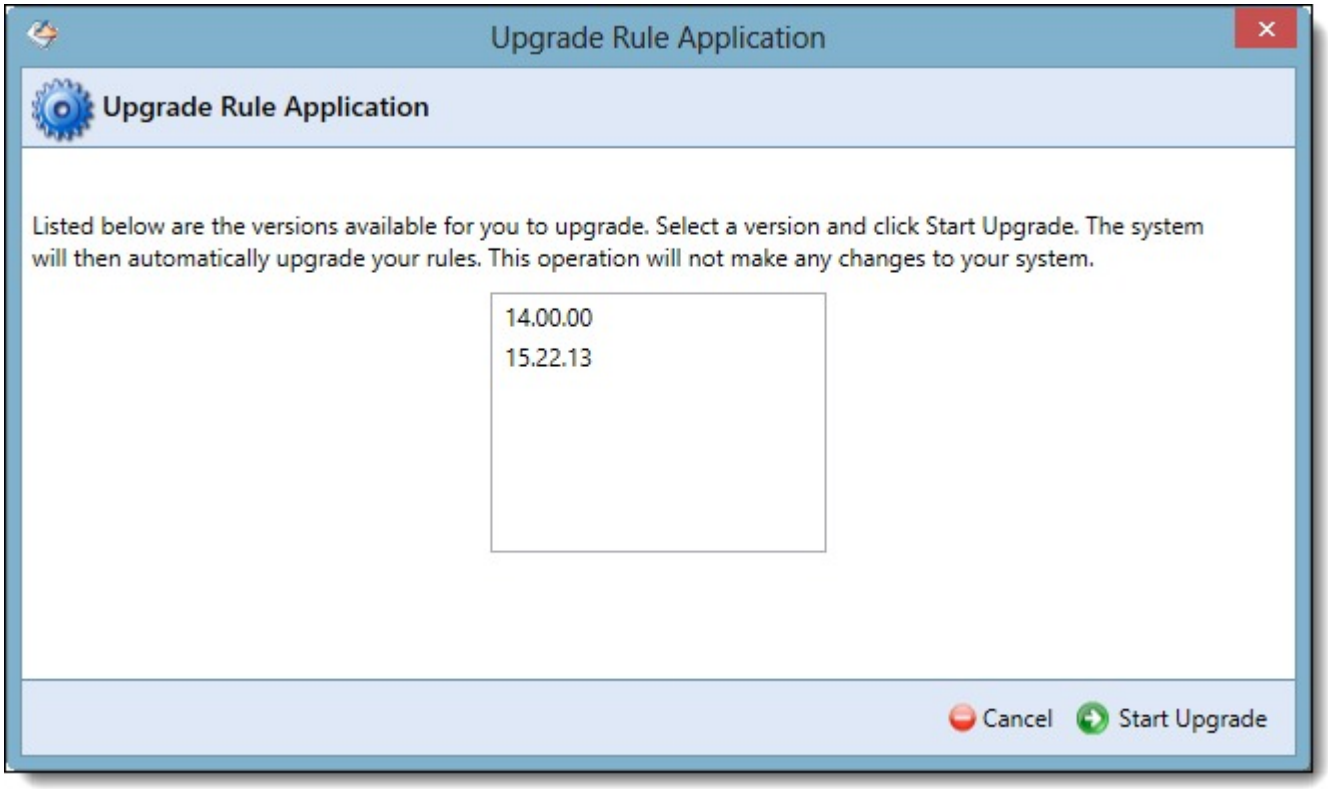
> When upgrading the rule application, an exclusive lock is placed on Rules Manager by the user performing the upgrade. When this occurs, the rule application can be accessed by another user upon clicking Edit Rules, the ability to Sync custom fields and Sync Lookups is not available.

Once Upgrade Rules is clicked, the upgrade wizard launches.

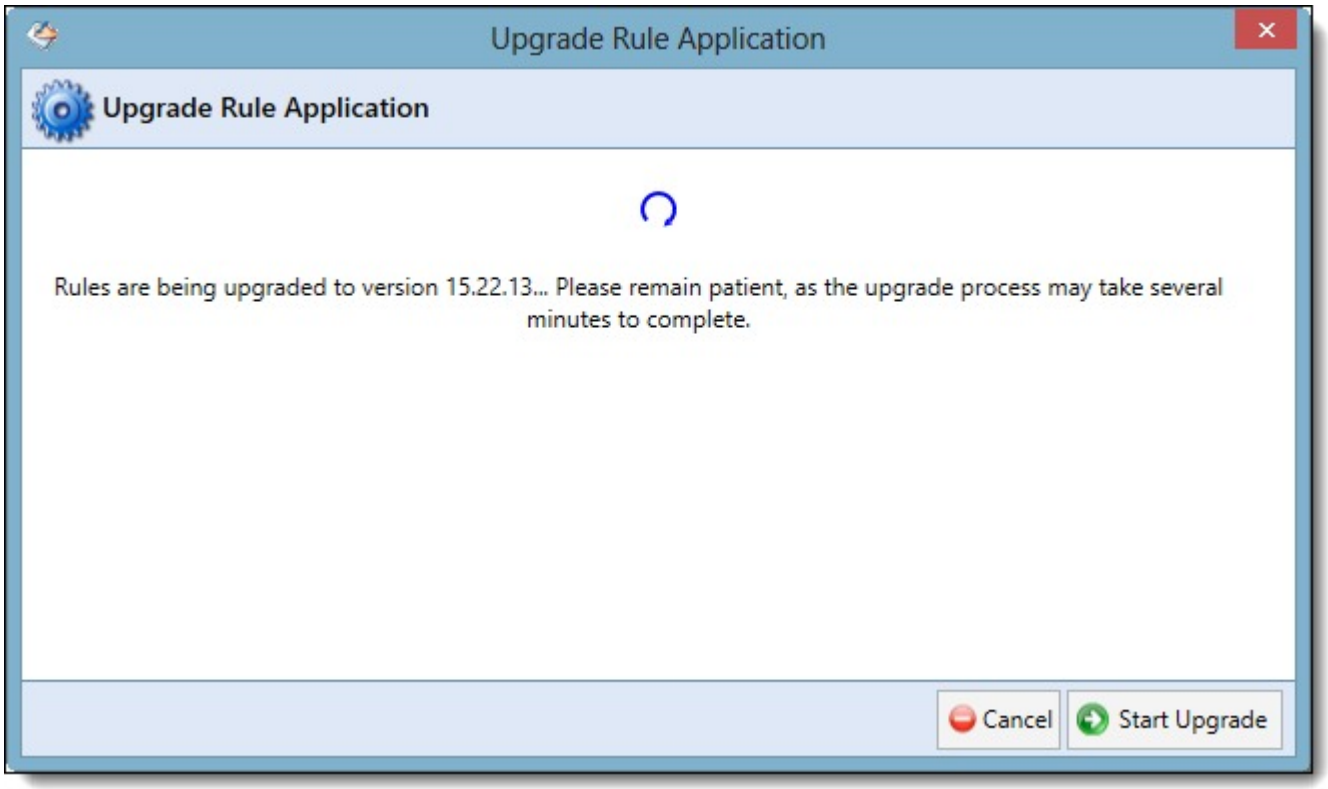
The system checks whether an upgrade is available. If an upgrade is available, the Upgrade Wizard returns a list of the From the available versions list, select the Rules Application version that corresponds with the system version

being upgraded to. Once selected, click Start Upgrade.

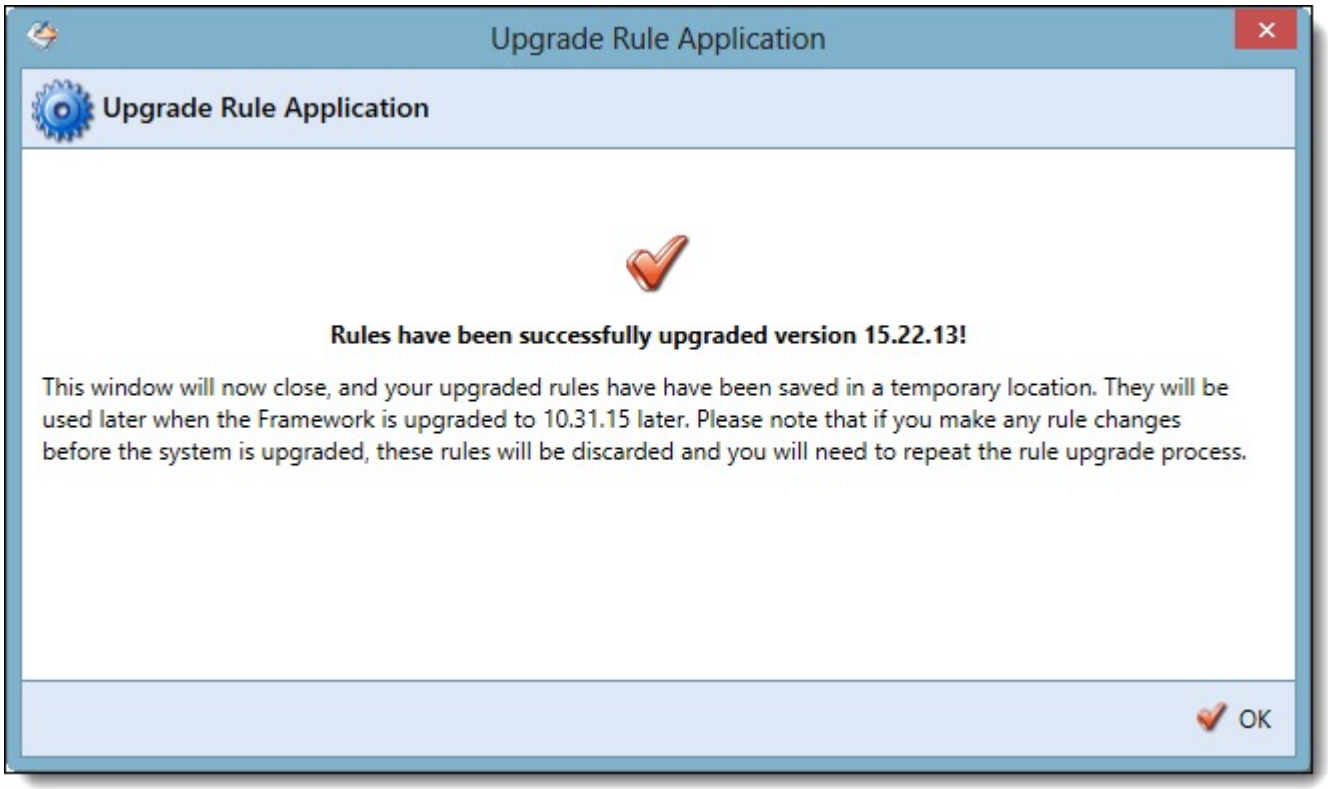
> The available version list only populates with the Rules Management versions later than the version currently installed at the institution.



Rules Management begins the upgrade process, which takes several minutes to complete. During this process, the system downloads and attempts to install the selected rule application package from the Temenos Service.



If the upgrade completes successfully, users are notified. Click OK to complete the Rules Management upgrade. \

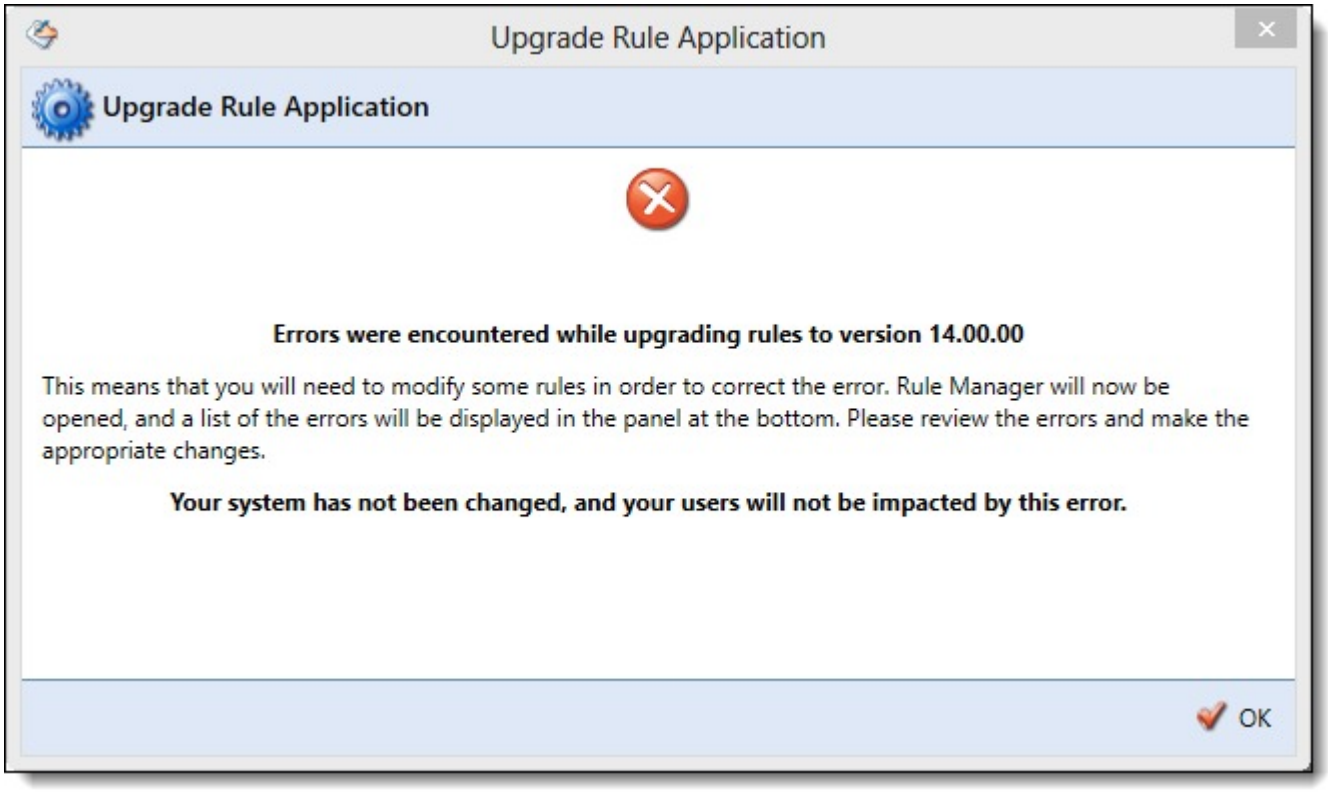


Upon clicking OK, the upgrade wizard closes, and users return to the Rules Management home screen. On the home screen, both tabs now indicate Rules have been upgraded.

After a successful upgrade, users should not update any rules within the current rule application until the system upgrade completes. Any updates made to the in the current version will be lost and the pre-upgrade process must be repeated.

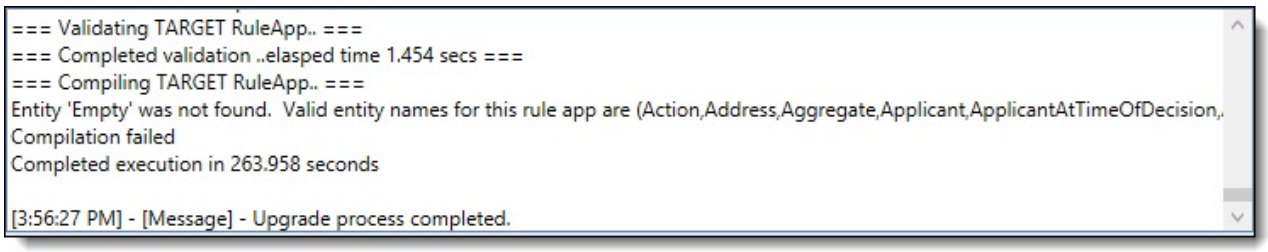
Upgrade Failure

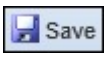
If the upgrade wizard fails to upgrade Rules Management, a failure message displays to users. Click OK to continue upgrading Rules Management in Upgrade Mode.



In Upgrade Mode, a protected instance of Rules Management opens that allows users to fix the rules which caused the upgrade failure.

- An informational message appears at the top of Rules Management that displays the current version of the rules application and the version to which the instituion is upgrading. For example:
  Upgrading from 10.31.15 to 14.00.00.
- In upgrade mode, the Save button is disabled, however Validate and Sync Lookups remain enabled.
- The Message section, located at the bottom of the Rules Management screen, alerts users the name of the field that caused the upgrade failure. Review the informational message and update all rules that require correcting.



- Once the all rules have been corrected and a click Validate. If no errors are found within the rule application, users are notified. Click **OK** to continue the upgrade.
- After a successful validation is performed, the Save button becomes enabled. Click 

to complete the upgrade.

> Users are unable to exit upgrade mode without losing progress until a successful validation occurs. Clicking Close without saving results in a loss of data and a failed upgrade.

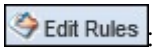
- Once Rules Management is successfully saved, upgrade mode is exited, and users return to the Rules Management home screen. On the home screen, both tabs indicate that rules have been upgraded.

Important Upgrade Information

- If Rules Management is upgraded to the wrong version, contact a Temenos Customer Care Representative to revert to the previous version of the rules application.
- If a Rules Management is open in upgrade mode, another rule author may end the exclusive lock on the rules application. If this occurs all upgrade progress is lost, and the upgrade process must start over from the beginning. It is advised that rule authors communicate that an upgrade is being performed, prior to proceeding with the upgrade.
- Upgrading the rule application without the Temenos Infinity version results in the rule application reverting to its prior version upon saving new rule logic. Upon attempting to save the rule application, authors are alerted that proceeding with the save overwrites stored version on the rule application.

Getting Started with Rules Management

> It is recommended to perform tasks within the Rules Management Application after-hours as saving the Rules Application may result in slowness within the Collections module.

This section provides an overview of the Rules Management Application that displays upon selecting 

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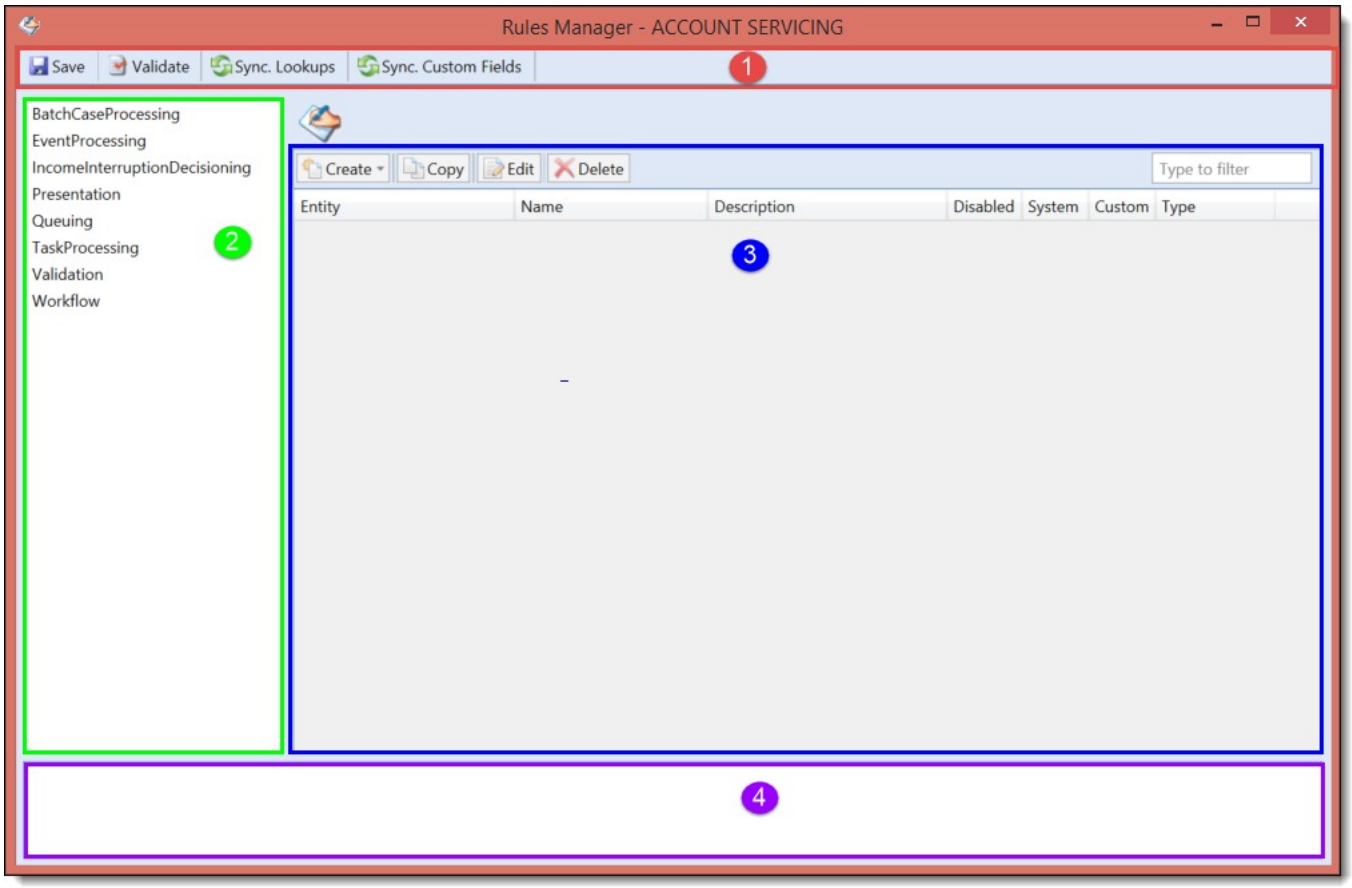


The Rules Management Application is comprised of four sections: the Application Toolbar, Left Navigation Pane, Main Window, and Message Window.

1- Application Toolbar

The following provides an overview of the five functions in the Application Toolbar, located along the top of the application screen:

Function	Description
Save	Click to retain all changes made within the Rule application. Save must be clicked at the Rule Application level once all changes to rule logic or lookup syncs are complete. Clicking Save or Save and Close within the individual rule does not save rule logic to the Rule Application without this final save. If a user tries to perform a save action while another user has an active saving session, the save fails, and an error message is received to inform that one or more other users have open sessions, which are preventing the saving session from occurring.
Validate	Click to check for errors in the rule logic without saving the Rule Application. After editing or authoring a rule, it is advised to perform this function.

Sync. Lookups	Click to import all of the most current information populated in Temenos Infinity, such as any new queues, and incorporate them into the Rules application. Prior to writing new rule logic, it is advised to perform this function. This function requires a saving session in Rules Management.
Sync. Custom Fields	Click to import all of the most current custom fields populated in Temenos Infinity. It is recommended to perform this function prior to writing new rule logic if new custom fields were recently created in Temenos Infinity. This function requires a saving session in Rules Management.

2- Left Navigation Pane

The Rules Management Application screen displays a left navigation pane containing Rule Categories. Selecting a category from the left navigation pane determines the type of rules that populate within the main window.

A category must be selected before a rule can be created or edited.

The following provides an overview of the categories in the Rules Management application and a description of when the category should be selected:

Category	Description
Batch Case Processing	Rules to use within the Batch Case processing functionality to automatically add tasks/task processing to cases.
Event Processing	Rules to use within an event process pair. The rules are run when a paired event, such as a field change, collection added, or collection removed, triggers them.
IncomeInterruptionDecisioning	Rules to use for the income interruption process to automatically approve, decline, set pending review, and determine the letters to be generated.
Presentation	Rules to define fields and/or aggregates to include in the Person Summary Panel and messages to be added in a Message Panel on Person Screens.
Queuing	Rules to define queuing options for Advanced Queuing. Advanced Queuing leverages business rules to enable administrators to write simple or complex criteria using account and/or account holder attributes to organize and assign accounts to a collections queue. Queuing rules are categorized as follows: • **AccountEligibility**: Use to define what people and accounts are eligible to be placed into a queue. • **AccountQueuing**: Use to build rules to determine how specific eligible accounts should be placed into a queue. • **PersonQueuing**: Use to build rules to determine how the person and their eligible accounts should be placed into queues.
TaskProcessing	Rules to use within the Execute Rules task type. For example, to automate the result of a task that drives the task process down a specific path.

Validation	Rules to use within Screens to perform an action after the screen is saved.
Workflow	Rules to use within the Execute Business Rules and Automated Decision workflow steps.

3- Main Window

When a category is selected in the left navigation pane, the rules associated with that category populate within the Rules grid in the main window.

The Rules grid consists of the following columns to display information related to the rule:

Column	Description

Entity	Identifies the Entity associated with the Rule. An Entity defines how a rule is applied, how an action is applied, and the information that the rule assesses in order to evaluate the conditions. For example, if writing a rule under the Workflow Category to be used in an Execute Business Rules workflow step, the key is to think about where the rule and workflow execute in order to determine the appropriate entity. Since the workflow runs on the Person workplace, the rule must be written at either Root.Person, Person.Accounts, or Person.Cases. The entity must start at the Person since that is the object that is being evaluated when running the workflow. If this rule is to capture the balance on the accounts included in the workflow, the rule is written under the Person.Accounts entity to execute the workflow on the Person and perform actions for each individual account associated with the workflow. The following table provides a list of the Entities in the Rules Management application along with a description of how the rule runs for each entity and an example of when to select the entity: ▶ Entity Table

Entity	How the Rule Runs	Example
Account	Rule runs once for every account.	Write a Queue Eligibility rule for Account Queuing to be called by the execute rule set action template in an AccountEligibilty rule.
Account.Cases	Rule runs once for each case related to the account in context.	Write a Task Processing rule to create a task based off of case attributes.
Account.Persons	Rule runs once for each person related to the account in context.	Write a rule to add a warning message to a panel listing each related person who has filed for Bankruptcy.
Case	Rule runs once for every case in the system.	Write a rule to be called by the execute rule set action template in a TaskProcessing rule.
Case.Accounts	Rule runs once for each account related to the case in context.	Write a rule to copy over the Balance at time of Bankruptcy for each account related to the Bankruptcy Case.
Case.Cases	Rule runs once for each case related to the case in context.	Write a rule to display any case numbers and other case related information for every legal case related to the case in context, providing the user with a full picture while working the case.

	Case.Persons	Rule runs once for each person related to the case in context.	Write a Task Processing rule to create a task for each person related to a case.
	Person	Rule runs once for every person in the system.	Write a Person Queuing rule to be called by the execute rule set action template in a PersonQueuing rule.
	Person.Accounts	Rule runs once for each account related to the person in context.	Write a rule to change a field, such as setting Next Contact Date, for accounts in a workflow.
	Person.Cases	Rule runs once for each case related to the person in context.	Write a rule to add a message to a panel for each active case displaying a stage.
	Root.Account	Rule runs once for the account in context.	*Only used for Income Interruption.
	Root.Case	Rule runs once for the case in context.	Write a rule to add tasks/processes to a case, not the person.
	Root.Person	Rule runs once for the person in context.	Write a rule to add a warning message to a panel regarding the number of open promises for the person.
	Root.Ticket	Rule runs once when the execute rules task is started.	Write a rule to determine which path to follow in a task process.
	Applicant.AssociatedNonBorrower	Rule runs for each associated non-borrower.	Write a rule to set associated non borrower host value.
Name	Identifies the Rule name provided in the Edit Rule window. When creating a new rule, this field defaults to **New_Rule**.		
Description	Identifies the Rule description provided in the Edit Rule window.		
Disabled	Identifies if the Rule is disabled. This functionality is defined by checking the **This rule is disabled** checkbox in the Edit Rule window.		
System	Identifies if the rule is a System Rule. System Rules are authored by Temenos and cannot be edited or deleted in Rules Manager. These rules can be disabled; however, by checking the **This rule is disabled** checkbox within the Edit Rule window.		
Custom	Identifies if the rule is a Custom Rule. Custom Rules are authored by Temenos and cannot be viewed, edited or deleted in Rules Manager.		

Type	Identifies if the rule is a standard Business Rule or Decision Table.

From the Main Window, administrators have the ability to create new business rules or decision tables, copy existing rules, edit existing rules, and delete existing rules by clicking the appropriate button along the top of the window. Type to filter through the list of rules that populate within the Rules grid.

4- Message Window

The Message Window displays messages for the Rule Application, including time of save or validation and whether or not the save or validation was successful.

If an error occurs during Rule Validation, it displays within this window. Double-click on the error to navigate to the item that caused the error to occur.

Rule Application Difference Report

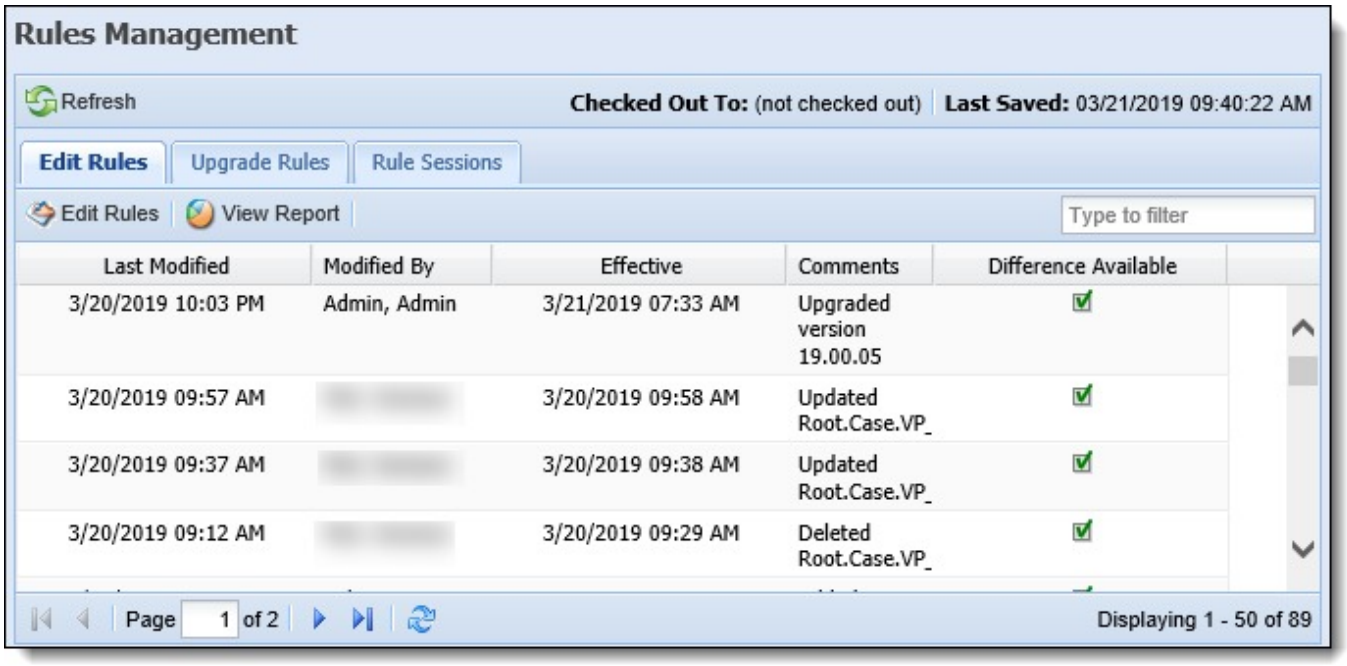
The Rule App Difference Report is a nightly process that searches for differences in the rule application. This process compares two versions of the rule application within the database for differences in both business rules and decision tables. If a difference is detected, the rule's previous logic and new logic are stored as images in the database and populate within the RuleApp Difference Report.

By default, this process occurs nightly at 10:00pm. However, this process can be configured to run at any time desired.

> The RuleApp Difference Report generation is an extensive process. It is advised that institutions do not run this report during business hours.

RuleApp Difference Summary

From the Edit Rules tab on the Rules Management Home Screen, users are able to view a summary of the changes to the rule application. An item is logged in the summary every time the rule application is saved. It is not determined by whether a change was made to the rule application or not.



A grid containing the following columns displays a brief overview of the changes made:

Column	Description
Last Modified	Displays the date the rule application was edited.
Modified By	Displays the name of the user who edited the rule application.
Effective	Displays the date and time that the compiled rule applicationwas put to use in the system.
Comments	Displays a short description of the changes to the rule application.
Difference Available	Displays if differences have been generated. After the overnight process runs, this box is automatically selected to indicate that different versions of the RuleApp have been captured and are available to view.

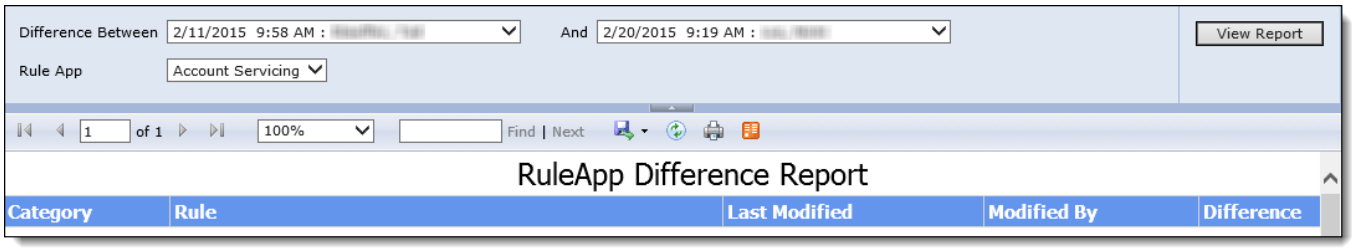
The Difference Available box is only selected when a difference in the two rule applications exists. If no changes were made during a save, the box is not selected after the overnight process is run.

At the bottom of the screen, users are able to refresh and navigate to subsequent pages of the difference report overview.

Viewing the RuleApp Difference Report

To view the complete RuleApp Difference Report, click View Report at the top of the page.

The report opens in a new window. At the top of the report, select the report's date range in the Difference Between fields and choose the Rule Application to include in the report. Once these parameters have been selected, click **View Report**.



The report renders in the lower section of the report screen. The results are organized by category and display the following information in columns:

Column	Description
Rule	Displays the entity level and name of the rule in the following format: Entity.Rule_Name
Last Modified	Displays the date the rule was edited.
Modified By	Displays the name of the user who edited the rule.
Difference	Displays the name of the rule as well as the original rule logic and the new rule logic.

The content of the report is determined by whether the rule is a business rule or decision table.

Business Rules

The differences between the two rules consists of the following information:

- If the rule existed on both the RuleApps, then the difference data contains the metadata about the Rule (RuleSet name, Entity, and category) and the text of both the before and after rules.
- If the rule was deleted, the difference data contains the metadata about the deleted Rule (RuleSet name, Entity, and category) and the deleted rule's text.
- If the rule was inserted, the difference data contains the metadata about the new Rule (RuleSet name, Entity, and category) and the new rule's text.
- If the rule name was changed or the rule was enabled or disabled, the difference data indicates information was "Modified."

Decision Tables

The difference between the two decision tables consists of the following information:

- If the decision table existed on both the RuleApps – then the difference data contains the metadata about the decision table (RuleSet name, Entity, and category) and the text indicating "Action" differences, "Condition" differences and "Row" differences.
- If the decision table was deleted – the difference data contains the metadata about the deleted decision table (RuleSet name, Entity, and category).
- If the decision table was inserted – the difference data contains the metadata about the new decision table (RuleSet name, Entity, and category).
- If the rule name was changed or the rule was enabled or disabled - The difference data indicates information was "Modified."

Rule Authoring

In order to efficiently author rules, it is important to be able to navigate through the Rules Management Application and to have an understanding for the available rule categories and entities. It is recommended to review the Getting Started with Rules Management topic within this guide prior to reviewing the following information regarding rule authoring.

Overview

Business Rules use business language to link the following:

Rule Language	Description
Condition	Logical circumstances, such as Fields, Field Values, or Functions, which are met in order for an Action to be assigned.
Action	Activities that are performed as a result of Conditions being met.

Rules can be used to create a logical statement such as, If [condition is true].....then [perform this action]. If that condition is not met, then the logic can continue into an Else statement. You then can nest and add more If [condition is true].....then [perform this action] statements.

Below are some guidelines to follow in preparation for authoring Business Rules:

- Write down what you are trying to accomplish before writing the rule. Remember that Business Rules can run on a person, an account, or a case.
- Review the Data Dictionary in conjunction with entities to understand what data fields are available.
- Think about categories and entities together. Each Rule runs on data that is available at the entity level and that which is mapped in the Load Options.

The overall steps to writing a Business Rule are as follows:

- Select a category.
- Select an entity.
- Define the conditions.
- Specify the actions to take place when the conditions are met.
- Map the Load Options necessary for the rule to execute.

Understanding Rule Sessions

Rule Sessions allow multiple users to work in the rule application simultaneously. Reference the table below for an overview of the session types that are supported in Rules Management:

Session Type	Description
Exclusive	Occurs when the entire rule application is locked by a single user, such as when the installer is run, or a Configuration Manager import is in progress. Only one user can have an exclusive lock on the rule application at a time. When a user has an exclusive lock on the rule application, other users can access Rules Management, but only in read-only mode, and no edits can be performed. In order to have an exclusive session, no other user can have an active rule session in the rule application.

Editing	Occurs when a user opens the rule application. Multiple users can have an editing session in the rule application simultaneously; however, each rule can only be edited by one user at a time. A lock is placed on a rule when a user opens the Edit Rule window to create, copy, or edit the rule.
Saving	Occurs when a user saves the rule application, or performs a Sync Lookups or Sync Custom Fields. Only one user can have a saving session at a time. In order to have a saving session, no other user can have an active exclusive or saving session.

The following behavior occurs in the rule application to ensure that more than one user is not able to edit the same rule at the same time, each user is working with the most up to date rule logic, and updated rule logic is able to be saved successfully:

- Once the Edit Rule window is open by a user, a lock is placed on the rule in the rule application. If another user attempts to edit the same rule while the lock is in place, the Edit Rule window opens in read-only mode, and the **Save** buttons are disabled within the window. A message also appears in the corner of the window to identify the username of the user who has the rule checked out for editing.

  > A lock is not released on a rule until the rule application is saved, or the user exits Rules Manager. If a rule is opened, and no changes are made within the Edit Rule window, the rule remains checked out for editing until the logic is saved.

- If a rule has been added and/or modified while the rule application is open, a message is received when the user accesses the rule to notify that updates were made, and the rule application must be refreshed. Clicking **OK** in the message refreshes the rule application, and provides the user with the most up to date rule logic in Rules Management.
- If a user tries to perform a save action while another user has an active saving session, the save fails, and an error message is received to inform that one or more other users have open sessions, which are preventing the saving session from occurring. This message displays the username of the user, and the session type.

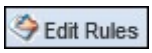
  > The above message is also received If a user tries to obtain an exclusive lock on the rule application while other rule sessions are in progress.

The active sessions in the rule application can be viewed within the Rule Sessions tab on the Rules Management home page.

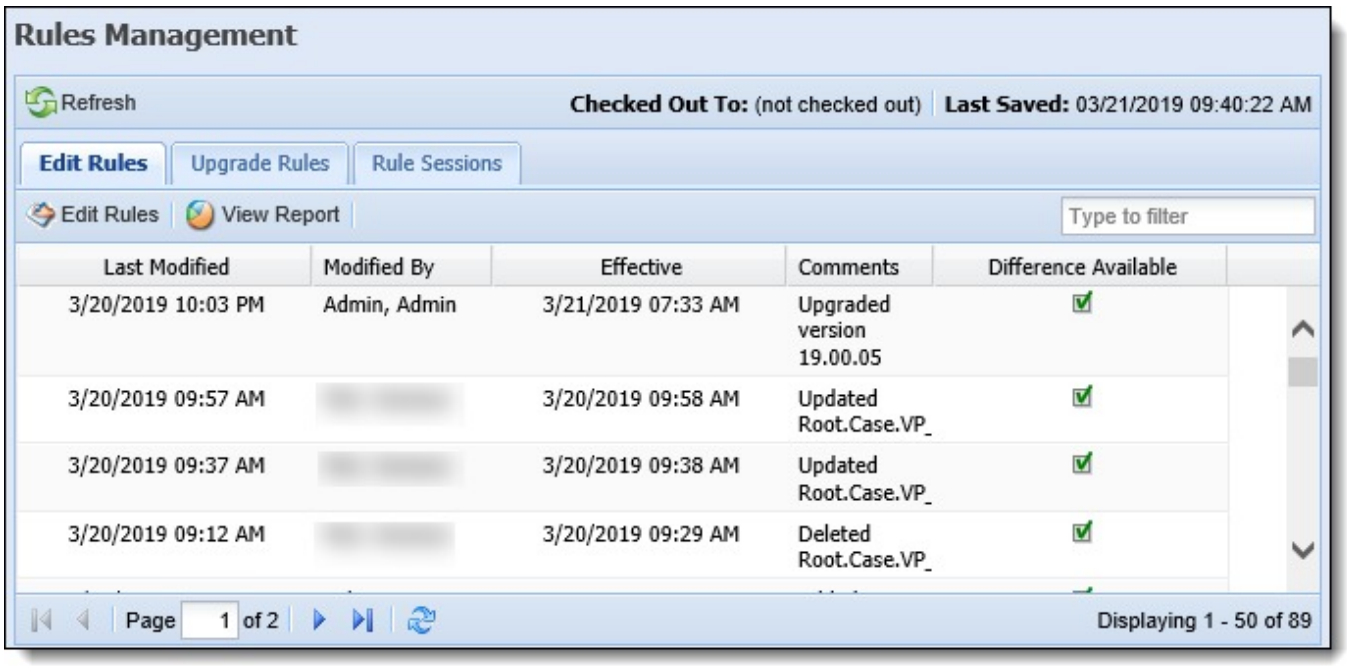
> Saving the rule application does not end a rule session. A rule session is ended by performing one of the following actions:
>
> - Saving the rule application, and then closing Rules Manager.
> - Clicking **End Session** within the Rule Sessions tab.
> - Logging out of Temenos Infinity.

> For more information, and to learn more about the behavior that occurs when a session is ended, please see the Rules Management - Rule Sessions topic in this guide.

Creating Rules

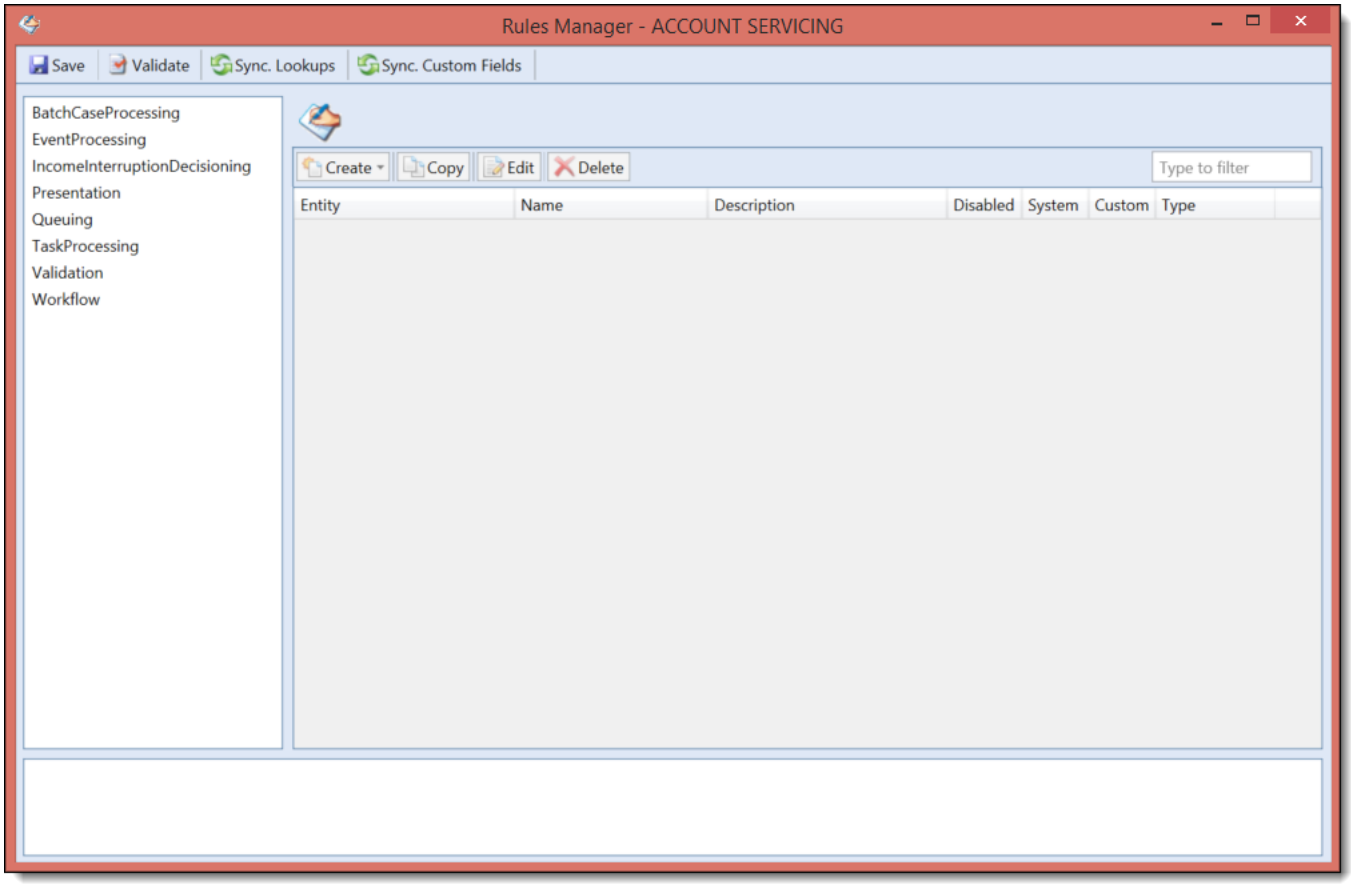
To begin authoring rules, click 

on the Rules Management Home Screen in System Management > Collections > Rules Management.



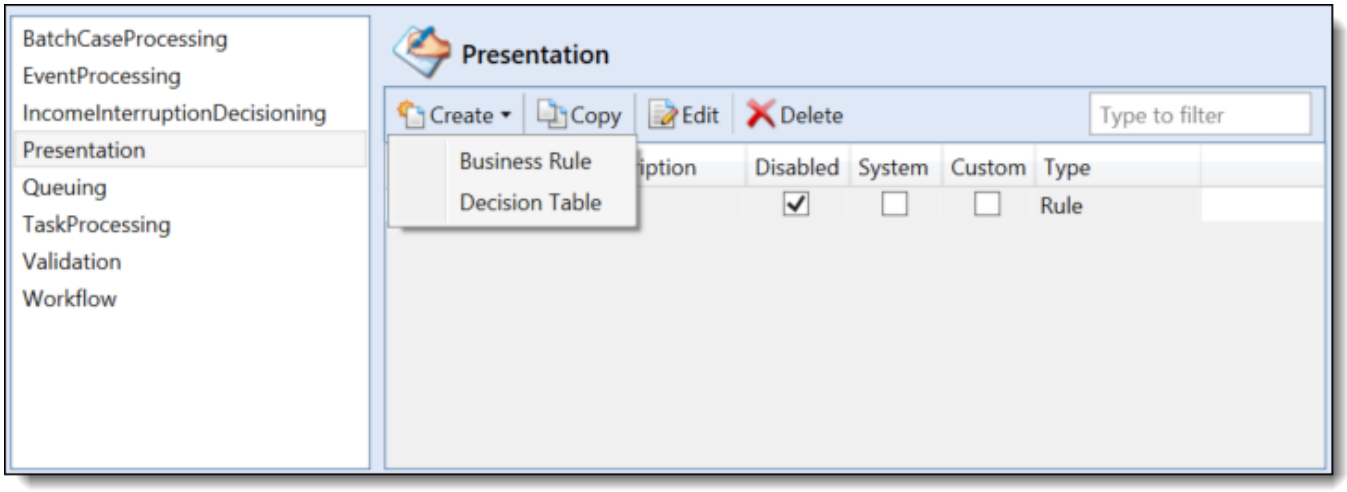
If rule authoring is not enabled, the Rules Management Application cannot be opened, and an error message is received upon selecting Edit Rules. To discuss options for enabling Account Servicing Rule Authoring, please contact your Temenos Customer Care Representative.

Upon clicking Edit Rules, the Rules Management Application displays:



To create a rule, select the appropriate rule category from the left navigation pane.

Click Create and select one of the following options:

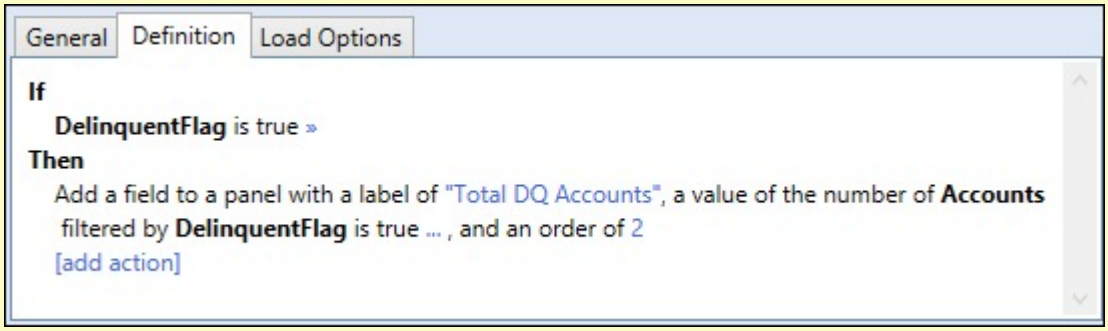


Rule	Description
Business Rule	Business Rules are based upon condition(s) and associated action(s) expressed in business language. Rule logic is typically expressed in the form of "If...Then..." statements.
Decision Table	Decision Tables are helpful to use in order to maintain complex business situations in a simple manner and are a powerful way to represent a set of related business rules in a table format in order to avoid repeating rule logic in several “If” statements. The resulting decision table evaluates the conditions and assigned actions from the top down until it finds a path where all conditions resolve to True.

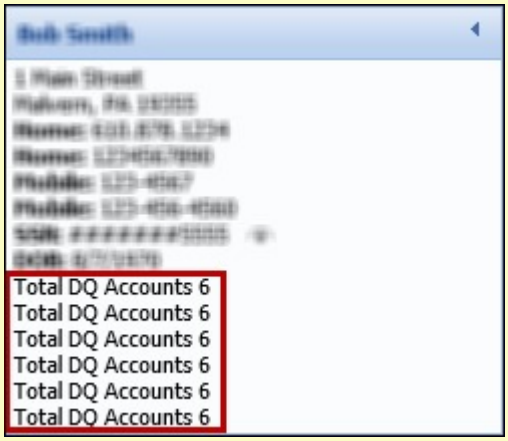
After selecting Business Rule or Decision Table from the Create drop-down, a **Select Entity** pop-up window displays. Select the appropriate Entity where the rule is to be applied and click **OK**.

To learn more about Entities, please see the Getting Started with Rules Management topic.

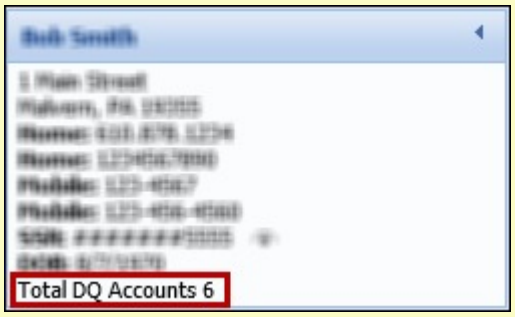
It is important to select the appropriate entity when authoring a rule to produce the desired results. For example John, an administrator, wants to use business rules to display in the person summary panel if any of the account holder's accounts are delinquent. Initially, John created a rule using the Person.Account entity using the following logic:



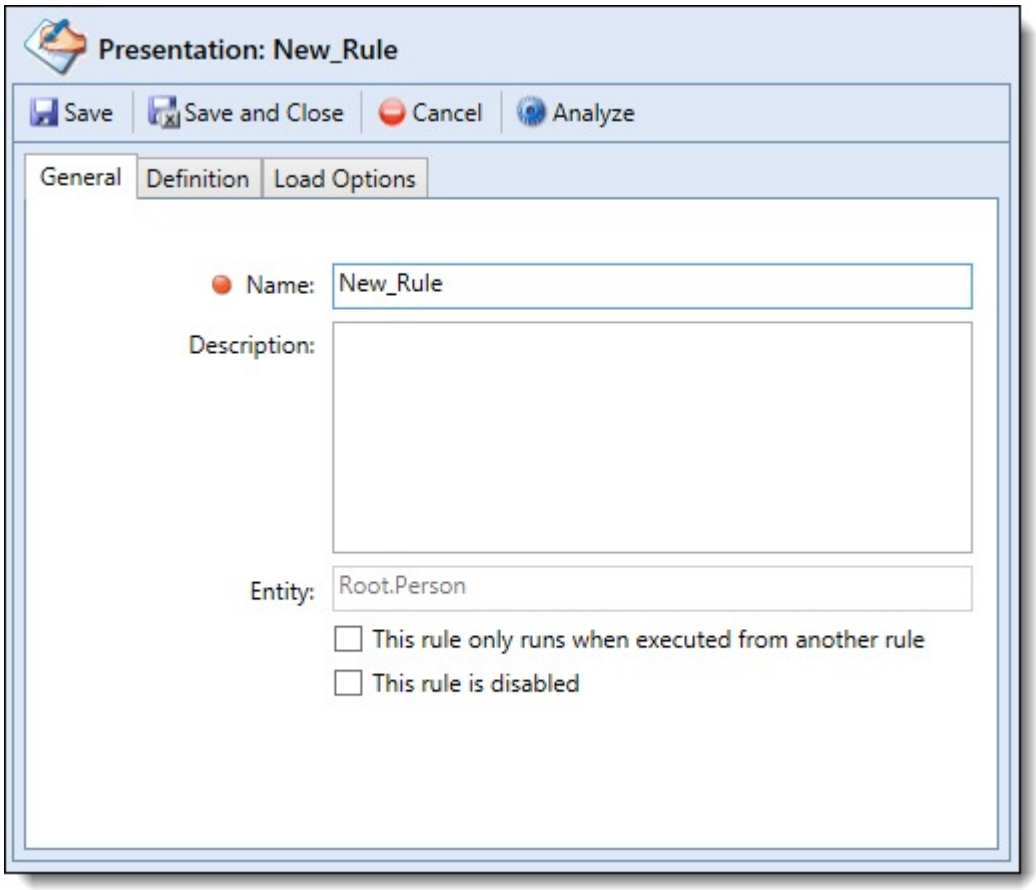
After testing the rule, John realized his rule was adding multiple fields to the person summary panel. Since the rule is written at the account level (Person.Account entity), the rule executes for each account individually and a separate field for each delinquent account is added.



John remembers this concept and authors a new rule using the Root.Person entity. By selecting the Root.Person entity, the rule is executed one time for the account holder to show a total of all DQ Accounts. Notice how a single field has been added displaying the total number of delinquent accounts versus a separate field for each delinquent account.



Once an entity is selected, the New Rule window appears displaying three tabs: **General**, **Definition**, and **Load Options**.



General

On the General Tab, the following fields display:

Field	Description
Name	Enter a Rule Name. This field cannot contain spaces or special characters. Rules under the same entity must be named differently in order to save the Rule Application. If this field is the same for more than one rule under the same entity, an error message is received when trying to save the Rule Application.
Description	Enter a Description. This field is not required, but is recommended in order to provide administrators with an understanding of the rule.
Entity	Displays the name of the entity. This field is not editable.

This rule only runs when executed from another rule	If checked, the rule is not executed as part of a rule category and is only executed if explicitly called from another rule. Users are able to call a different rule through action **execute rule set** and select the rule that is to be executed. This check box can be used to control the order of execution for rules in a group. This functionality must be defined when a rule is created. After a rule is saved, this check box is disabled and can no longer be configured. If authoring Queuing Rules for Advanced Queuing, and calling additional rules within the AccountEligibilty, AccountQueuing, or Person Queuing rules, this check box must be enabled in order to configure the rule to appear within the execute rule set action template.
This rule is disabled	If checked, the rule is disabled and not executed. This check box can be used for creating rules to be activated at a later date. It is recommended to disable a rule rather than permanently delete it from the Rules Management Application. When a rule is configured to execute from another rule, it cannot be disabled; therefore, this check box becomes inactive when the **This rule only runs when executed from another rule** check box is selected.

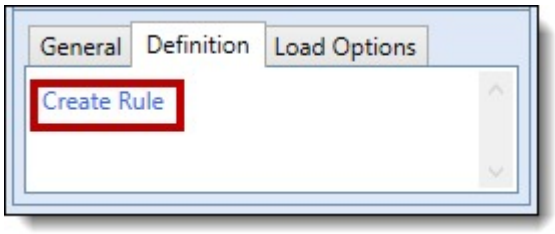
Once all fields are complete, navigate to the Definition Tab.

Definition

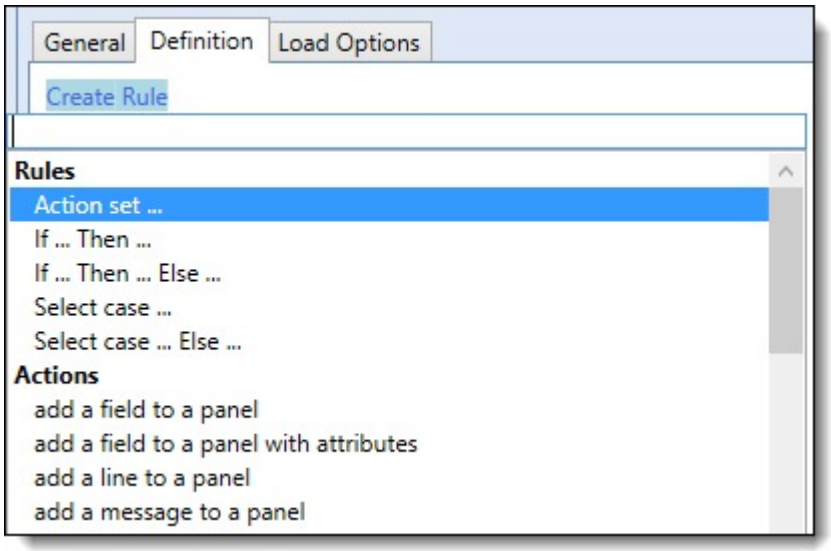
The Definition tab contains the rule logic and is where administrators can modify and build a rule. The Definition tab appears different depending on the type of rule being created.

Business Rule

To begin building a Business Rule, click **Create Rule**.



Select a rule construct or action from the list that displays:



Rule

The following table provides the different business rule languages for each conditional template and their definition:

Business Rule Language	Definition
Action Set	Take the following actions.
If...Then...	If the conditions are met, Then execute this action.
If...Then...Else	If the conditions are met, execute the Then action. If the conditions are not met, execute the Else action.
Select Case	Set up conditions within a case. If the case conditions are met, execute the Then action. The first case condition that is met gets executed.
Select Case...Else	Set up conditions within a case. If the case conditions are met, execute the Then action. The first case condition that is met gets executed. If no case conditions are met, then execute the Else action.

Action

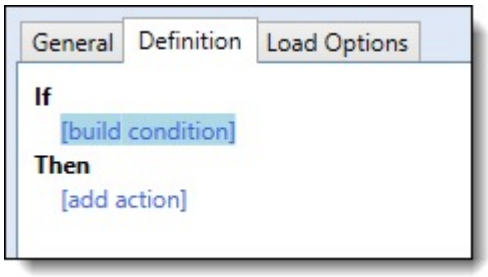
The following table displays the actions available when building a rule, what the action does, and the categories for which the action can be used:

Action	What it Does	Category Selection
add a field to a panel	Adds a field to the Person Summary panel- label, Order.	Presentation
add a field to a panel with attributes	Adds fields to the Person Summary panel- label, order and then attributes include size, color, and style.	Presentation
add a line to a panel	Adds a line to the Person Summary panel.	Presentation
add message to panel	Adds a good, bad, warning or none (information) message to a panel on Person screens.	Presentation

assign account to queue	Assigns accounts to a queue. Rules including this template must be authored under the Person.Accounts entity.	Queuing
assign person to queue	Assigns persons to queue. Rules including this template must be authored under the Root.Person entity.	Queuing
display warning message	Displays a warning message within a workflow or screen.	Workflow in conjunction with Execute Business Rules Step and Screens
display error message	Displays an error message and prevents user from completing the workflow or screen.	Workflow in conjunction with Execute Business Rules Step and Screens
display informational message	Displays an informational message within a workflow or screen.	Workflow in conjunction with Execute Business Rules Step and Screens
execute decision table	Executes Decision Table already configured in the system.	Can be used in any category
execute rule set	Executes a rule already configured in the system. Rules called by the execute rule set action template must be authored under the Account, Person, or Case entity.	Can be used in any category
set queue eligibility for account	Sets the person/account as eligible or not eligible for Advanced Queuing. Rules including this template must be authored under the Person.Accounts entity.	Queuing

set the value of a field	Sets the value of a field (can use all math operations, concatenations, etc.).	Workflow (in conjunction with Execute Business Rules step), Task Processing, Batch Case Processing
set the workflow decision to no	Sets workflow decision to no to take user down the no path automatically.	Workflow in conjunction with Automated Decision Step
Set the workflow decision to undetermined	Sets workflow decision to undetermined and presents a message to the user to manually answer yes/no.	Workflow in conjunction with Automated Decision Step
Set the workflow decision to yes	Sets workflow decision to yes to take user down the yes path automatically.	Workflow in conjunction with Automated Decision Step

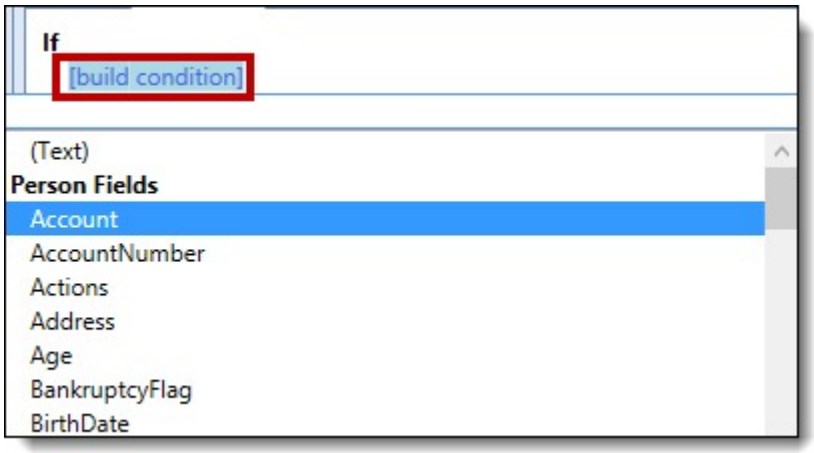
After a **Rule** or **Action** is selected, the rule template displays:



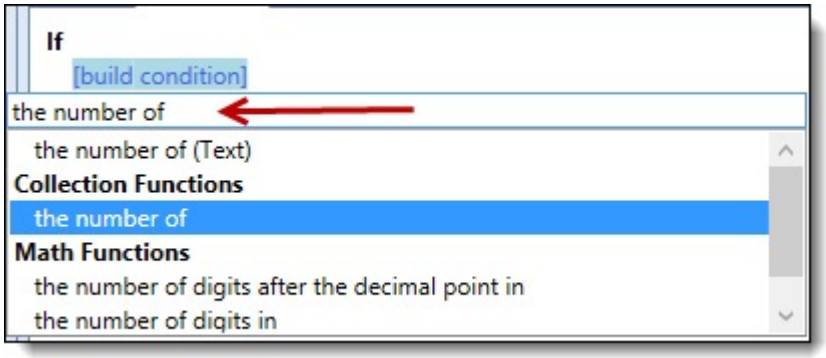
> There multiple ways to author a rule. The following demonstration uses an **If... Then** expression to build a **Presentation** Rule for a Messages Panel and should be used for EXAMPLE ONLY.

To begin building the rule condition, click [build condition]. A list of available fields and functions displays:

> The fields that display within this list are determined by the Entity chosen. For example, since the Root. Person Entity was chosen for this demonstration, a list of Person Fields is displayed. For more information on the fields available for rules, please see the Data Dictionary.

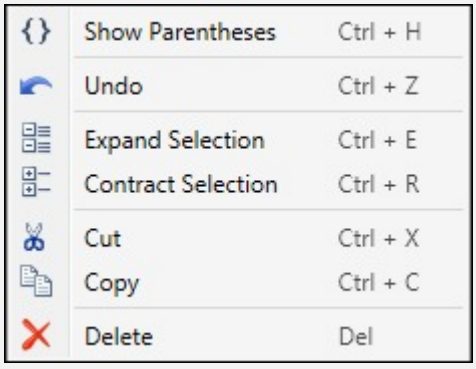


When building conditions and actions, select a field or function from the list or type in the drop-down to filter the selections.



Based on this selection, blue links populate within the template in order to build a complete expression.

To undo or add to a selection, right click on the selected item and choose an edit option from the list that displays:



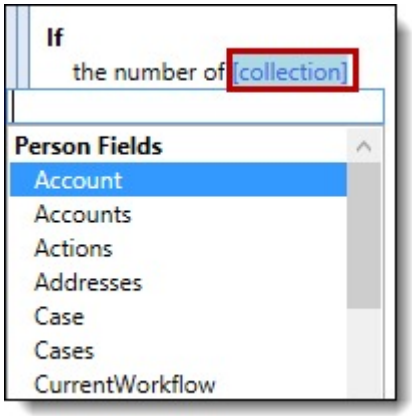
When deleting a field, expression, etc., all additional criteria after the deleted item is also removed.

When an expression is incomplete, these links appear to indicate that an additional field or function is required in

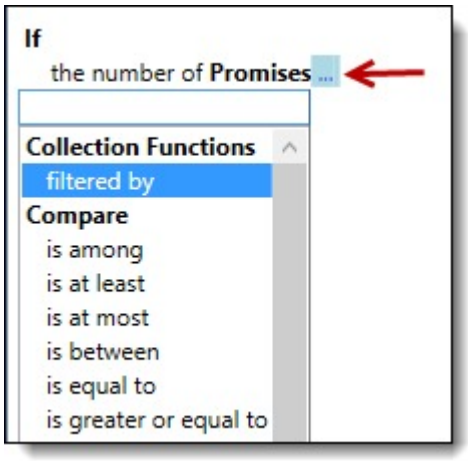
order to complete the rule expression. The blue links contain placeholders and special characters to alert to the following:

Name	Prompt	Description
Open Placeholder	...	Indicates that another template selection is required in order to complete the expression.
Named Placeholder	[collection]	Indicates that a value, field or additional template selection is required in order to complete the expression.
Chevron Extender	»	Indicates that the rule template can be extended by selecting a condition of "and" or "or."
Caret Extender	^	The ^ extender is used to append logic to the previous field, value or entire template, such as adding date or text functions.

Select a field to display a list of all relevant expressions applicable to the field. For example, clicking **[collection]** displays a list of the applicable **Person Fields**.

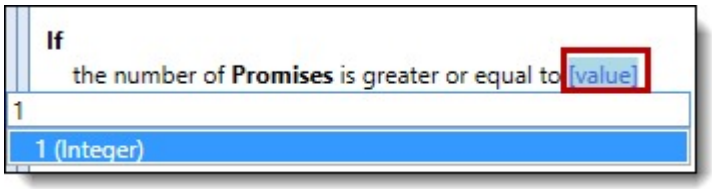


Click the **...** to display a list of the further information that is needed regarding the number of Promises. For this example, a value for the number of promises must be defined in order to complete this expression. Clicking the ... populates a list of applicable **Collection** and **Compare Functions**.



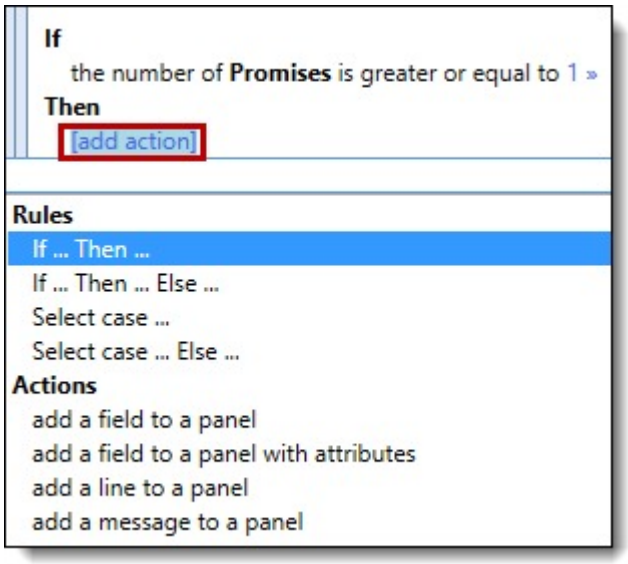
Select a function from the list in order to populate the **[value]** field.

Click [value] and enter an integer value within the top of the list.

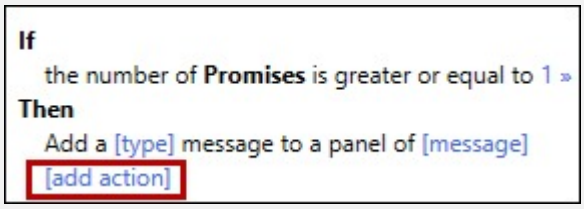


When all conditions are set, define the actions to occur as a result of those conditions.

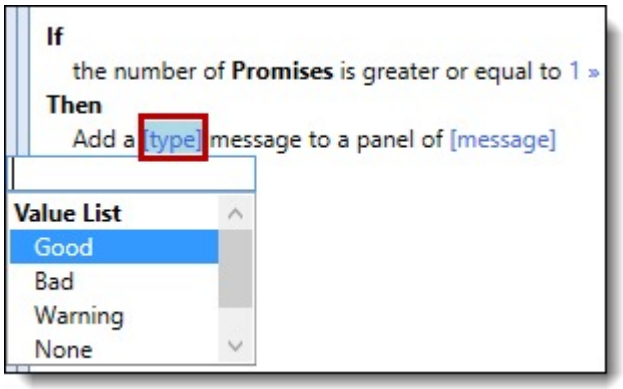
Click **[add action]** to define the resulting action and select an action from the list that displays.



Once one action is selected, a new [add action] link populates to allow for multiple actions to be defined.

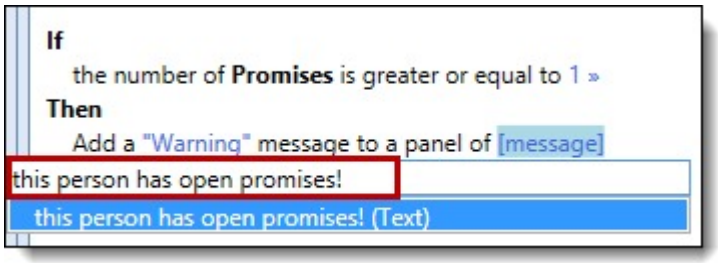


As previously mentioned, based on this selection, blue links populate within the template in order to build a complete expression. Select **[type]** to define the message type.

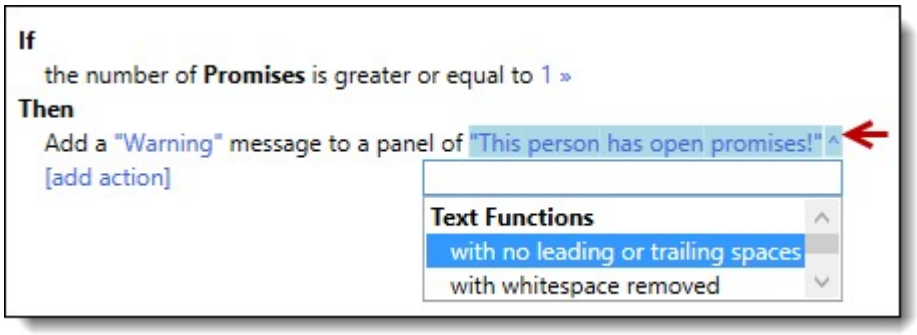


Once a type value has been selected, click **[message]** to define the panel message.

To add text, simply enter the message within the text box.



Click the ^ to define optional text options, such as **with no leading or trailing spaces** or **with whitespace removed**.

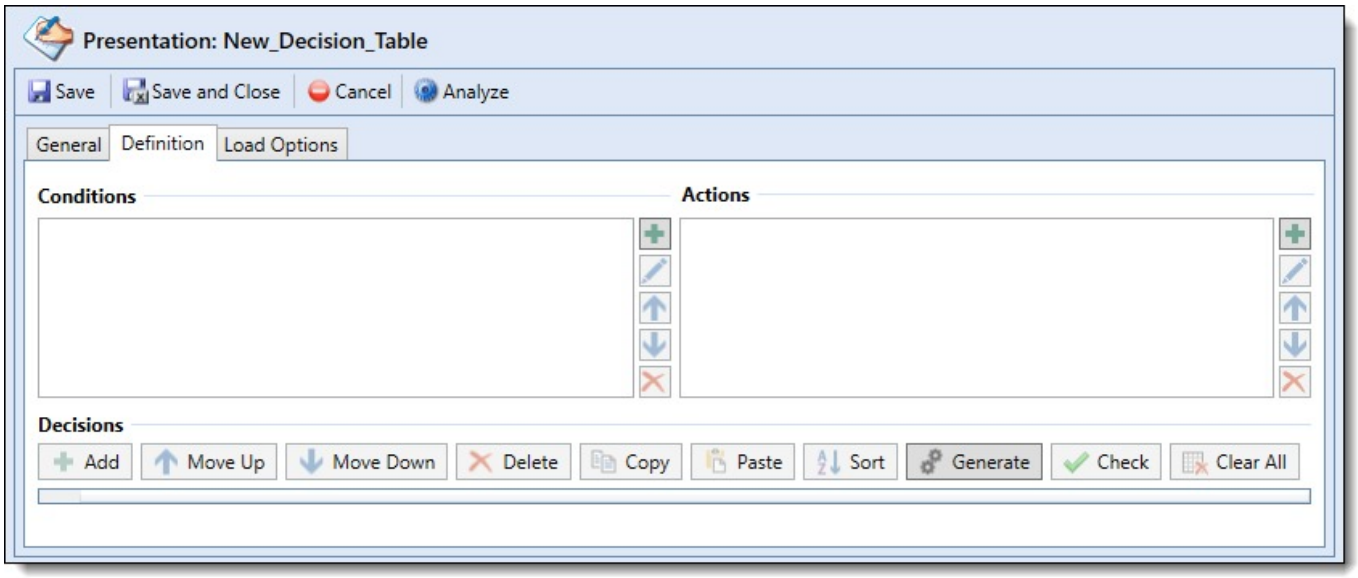


> Upon the completion of this rule, the user has the following logical statement: If the number of Promises is greater than or equal to 1, then add a “WARNING” message to a panel of “This person has open promises!”

Once all rule logic has been defined, navigate to the Load Options tab within the New Rule window to assign the Load Options for the Business Rule.

Decision Table

Administrators can modify and build a decision table using the Conditions, Actions, and Decisions boxes that display within the Definition tab.



This section provides an overview of the following information to assist administrators with configuring a Decision Table:

- Conditions
- Actions
  - Set Value
  - Business Language
- Decisions

Conditions

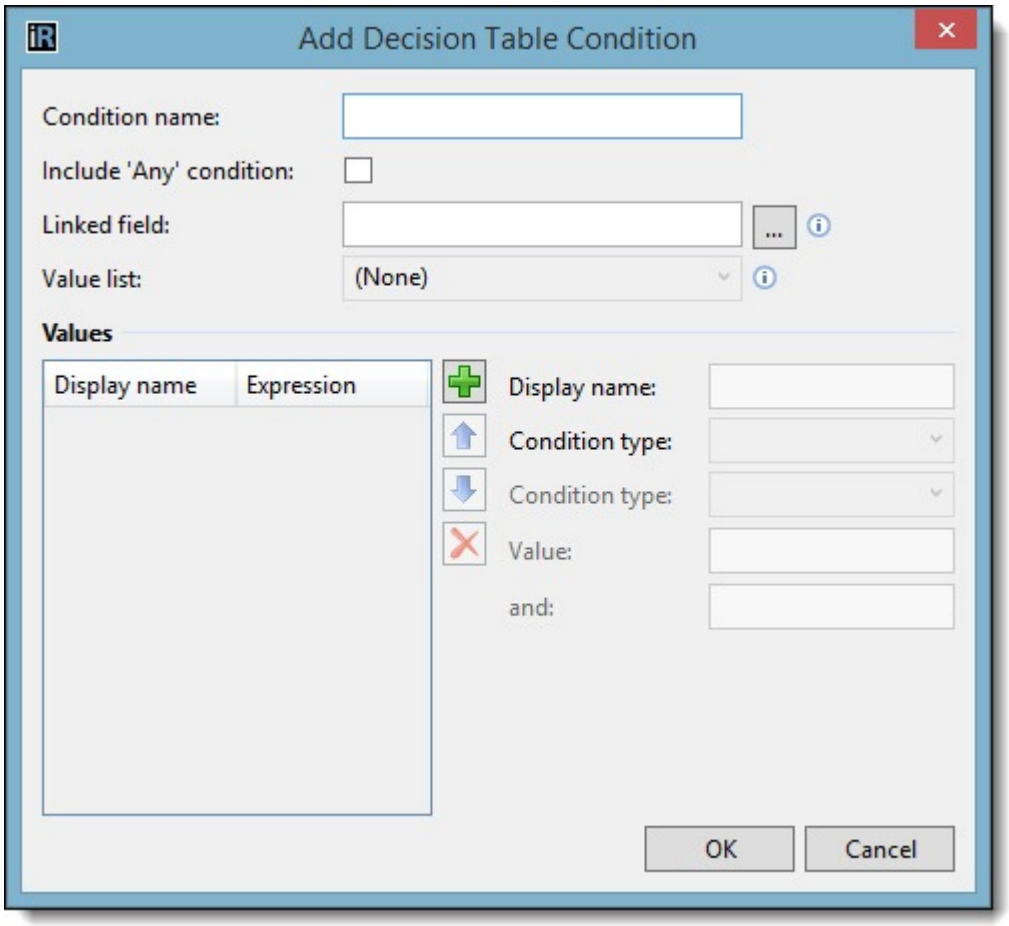
In a Decision Table, multiple conditions can be built to compare individual field values or ranges of values. The Decision Table evaluates from top to bottom until it finds a result where all conditions resolve to True.

The **Conditions** box contains the following buttons:

Button	Function
	Add Condition
	Edit an existing condition.
	Move the order that conditions appear in the columns of the Decision Table.
	Delete an existing condition.

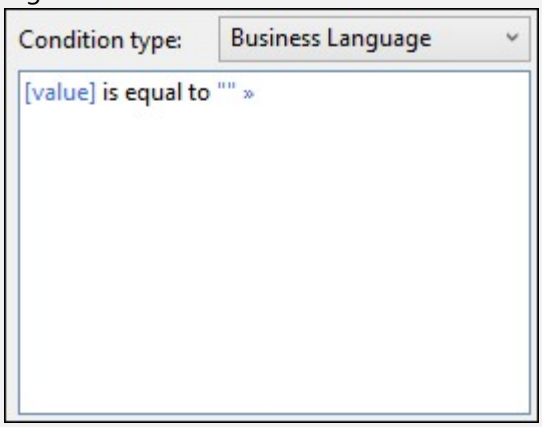
To add a condition, select the **Add Condition** button to begin building rule criteria.

The **Add Decision Table Condition** window appears:



Using the table below, complete the applicable Add Decision Table Condition fields:

Condition Field	Description
Condition name	Specifies the name of the condition that appears in the Decision Table column header. This is a required field.
Include 'Any' checkbox	Adds the 'Any' option to the list of conditions. Selecting 'Any,' in the table triggers that condition to be True under any circumstances.
Linked Field	Specifies if the condition relates to a specific field. Enter the field name in the box or click the ... icon to display a list of available fields. This is not a required field.
Value List	If linked to a field, select a value list from the drop-down. This drop-down contains the lookup lists available from System Management > Field Configurations. When a Value List is selected, the field values associated with the list automatically populate within the Values grid. A Value List cannot be selected if a Linked Field is not defined.

Values Grid	Specifies the Display name and Expression for each field value. When a Value List is selected, this grid pre-populates with the field values associated with the selected value list. When a field value is selected within the Values Grid, the **Display name**, **Condition type**, and **Value** fields pre-populate with information for the selected field value.
Display Name	Specifies the name that displays in the drop-down for the condition column of the Decision Table.
Condition type	Specifies if the condition set relates to a field or is defined using an expression or business language. If **Expression** or **Business Language** is selected, a window appears to define the rule logic: 
Condition type	Specifies the compare function used to define the condition criteria. This field does not display when the Expression or Business Language condition type is selected.
Value	Specifies the ID Value in the database for the selected field value.

Once all fields for the condition are configured, click **OK** to save the condition.

As previously mentioned, multiple conditions can be created within a decision table. Before defining actions for the decision table, create all conditions following the above steps.

Actions

In a Decision Table, the end result of the logic path is determined by the defined actions. Multiple action sets can be created and associated with various conditions.

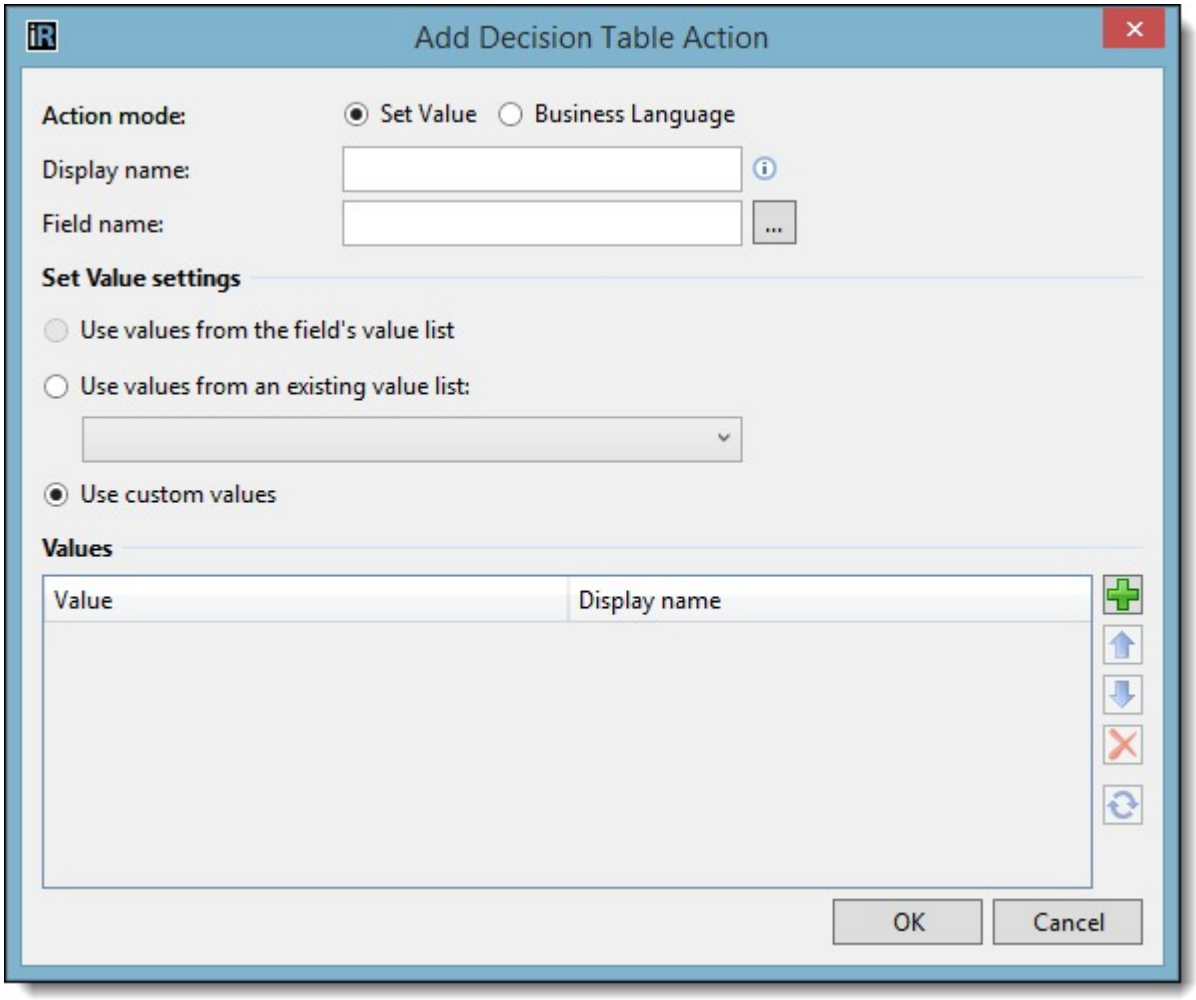
The **Actions** box contains the following buttons:

Button	Function
	Add an action.
	Edit an existing action.
	Move the order that actions appear in the columns of the Decision Table.

	Delete an existing action.

To create an Action, click the button to select the desired action template.

The **Add Decision Table Action** window appears. Select one of the following action modes:



Set Value

Select **Set Value** to link the action to a specific field in Temenos Infinity.

Using the table below, complete the applicable Add Decision Table Action fields when Set Value is selected:

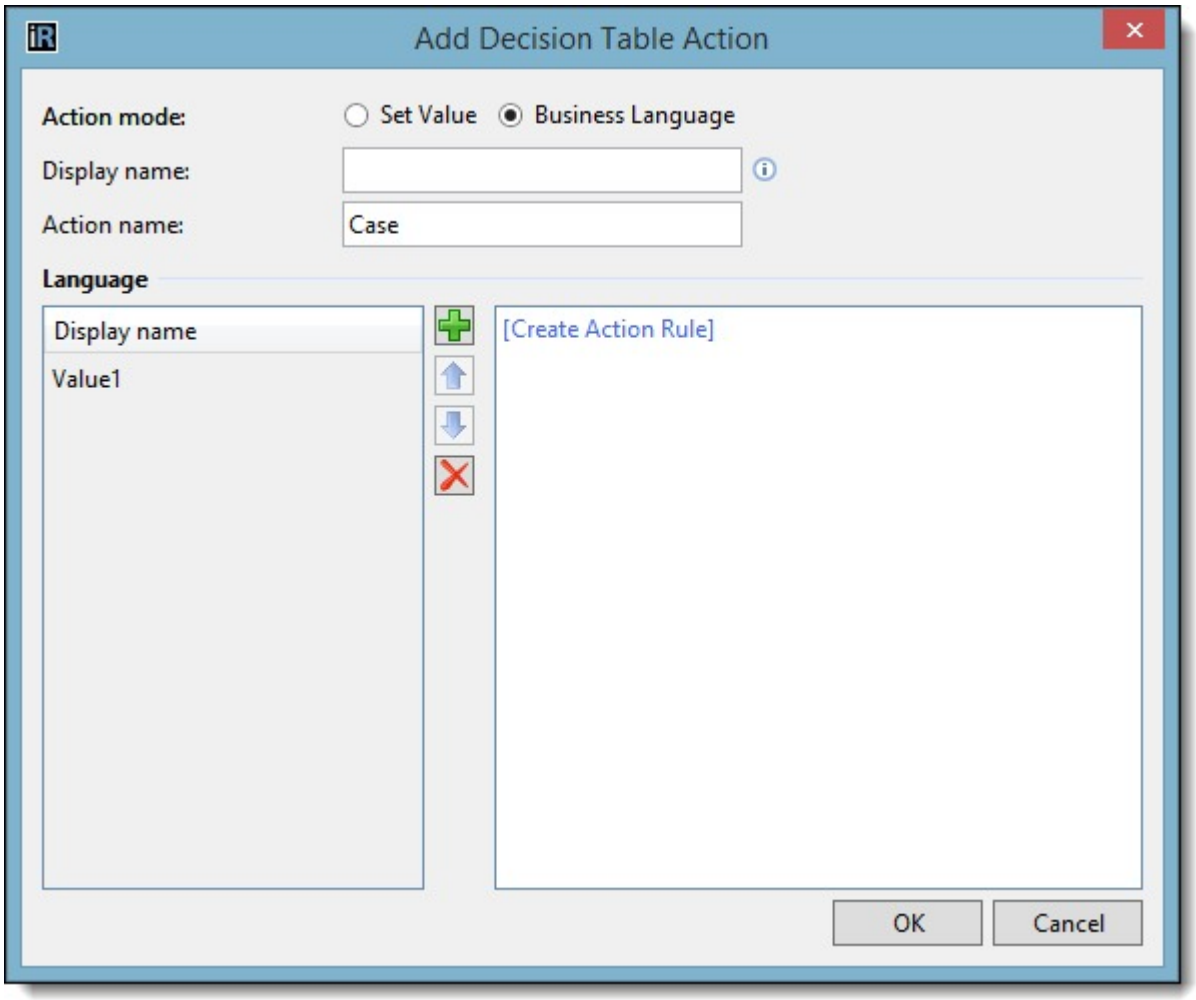
Action Field	Description
Display Name	Specifies the name that displays in place of the field name in the decision table column header. This is not a required field
Field Name	Specifies the name of the action that appears in the drop-down for the action column of the Decision Table. Enter a field name or click the button to select from a list of field values. This is a required field.

Set Value Settings	Select **Use values from the field's value list** to add lookup values for the field defined within **Field Name.** This setting is disabled if a lookup value is not defined within Field Name. Select **Use values from an existing value list** to add values from existing lookup lists. When this setting is selected, the values pre-populate within the Values grid. Select **Use custom values** to define custom values for the rule action. When this setting is selected, the Values grid becomes editable to define the value. The Value setting defaults to Use custom values.
Values Grid	Specifies the **Value** and **Display Name** for each field value. When the Use values from an existing value list is selected, this grid pre-populates with the field values associated with the selected value list and cannot be edited. When the Use Custom Values setting is selected, this grid becomes editable to allow for a custom value to be added. Click the button to add a custom value to the Values grid. The Display name defaults to Value(number) as values are added, but can be configured. Click within the field box to edit the name that displays.

Business Language

Select **Business Language** to define actions for the decision table using a rule template.

When the Business Language action mode is selected, the Add Decision Table Action window appears as follows:



Using the table below, complete the applicable Add Decision Table Action fields when Business Language is selected:

Action Field	Description
Display Name	Specifies the name that displays in place of the field name in the decision table column header. This is not a required field
Action Name	Specifies the name of the action that appears in the drop-down for the action column of the Decision Table. This is a required field.
Language	Specifies the **Display name** for the action and provides a window to create an Action Rule. Click the button to populate the **Create Action Rule** link and use business language to define the rule action. The Display name defaults to Value(number) as values are added, but can be configured. Click within the field box to edit the name that displays.

Repeat the steps for the selected action mode until all options for the action are defined. Click OK to save the action.

Once all actions are created, navigate to the Decisions box to complete the Decision Table.

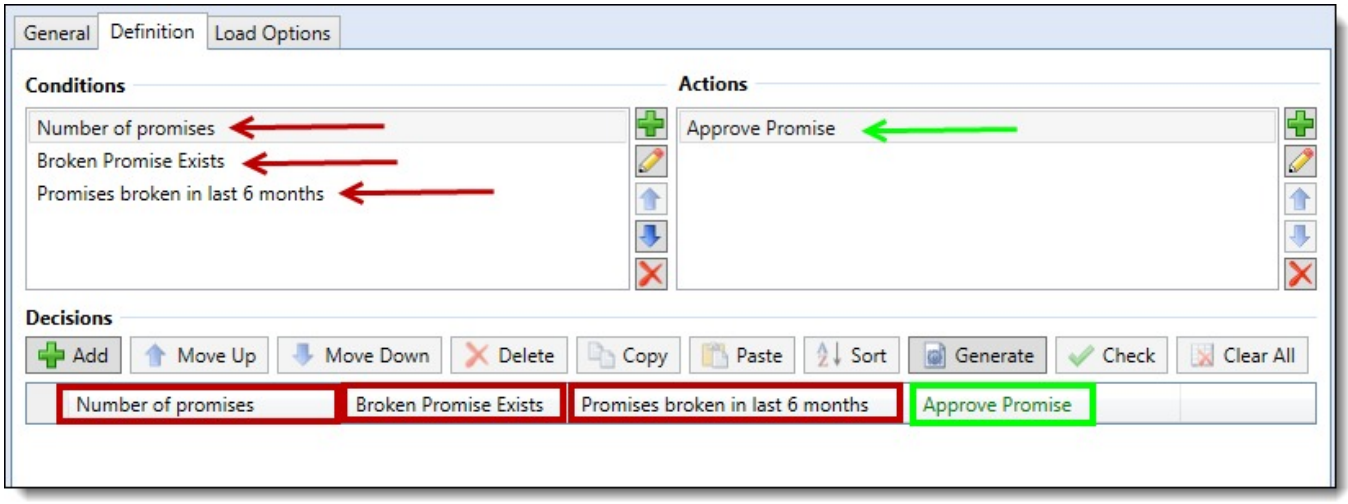
Decisions

The Decisions Table is ready to populate once all Conditions and Actions have been defined.

Within the Decisions Box, the following buttons display to configure the Decision Table:

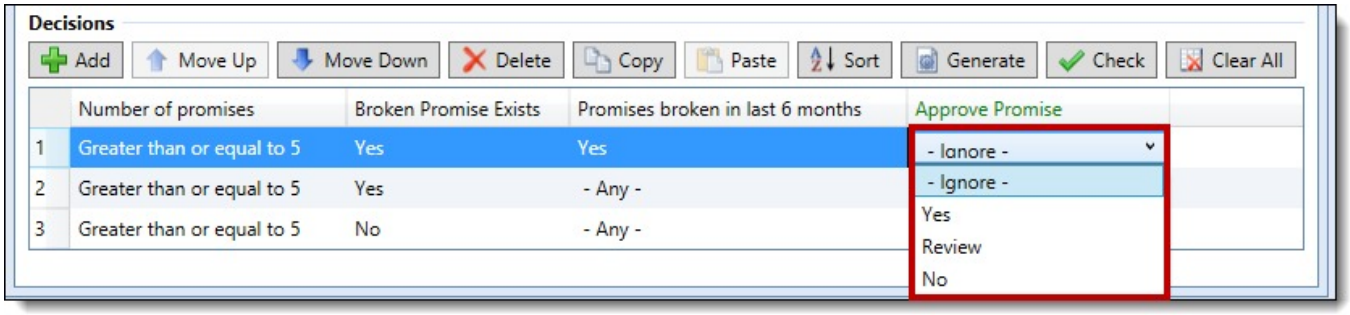
Button	Function
Add	Add new row to the Decision Table.
Move Up	Move selected row up.
Move Down	Move selected row down.
Delete	Delete selected row.
Copy	Copy selected row.
Paste	Paste the copy of a row.
Sort	Select the sort order of the Decision Table.
Generate	Generate an exhaustive list of all possible options for the table.
Check	Check Decision Table for any duplicated or missing options.
Clear All	Delete all rows of the Decision Table.

In the example below, notice how the defined Conditions and Actions have pre-populated within the top of the table:



Manually add rows to the Decision Table by clicking Add or select Generate to create an exhaustive list of all possible combinations for the table.

Using the associated drop-downs within an Action column, assign Conditions to Actions until all desired outcomes have been accounted for within the Decision Table.



All Actions default to **Ignore**. When Ignore is selected, no action is taken for the associated condition.

Once all rule logic has been defined, navigate to the Load Options tab within the New Rule window to assign the Load Options for the Decision Table.

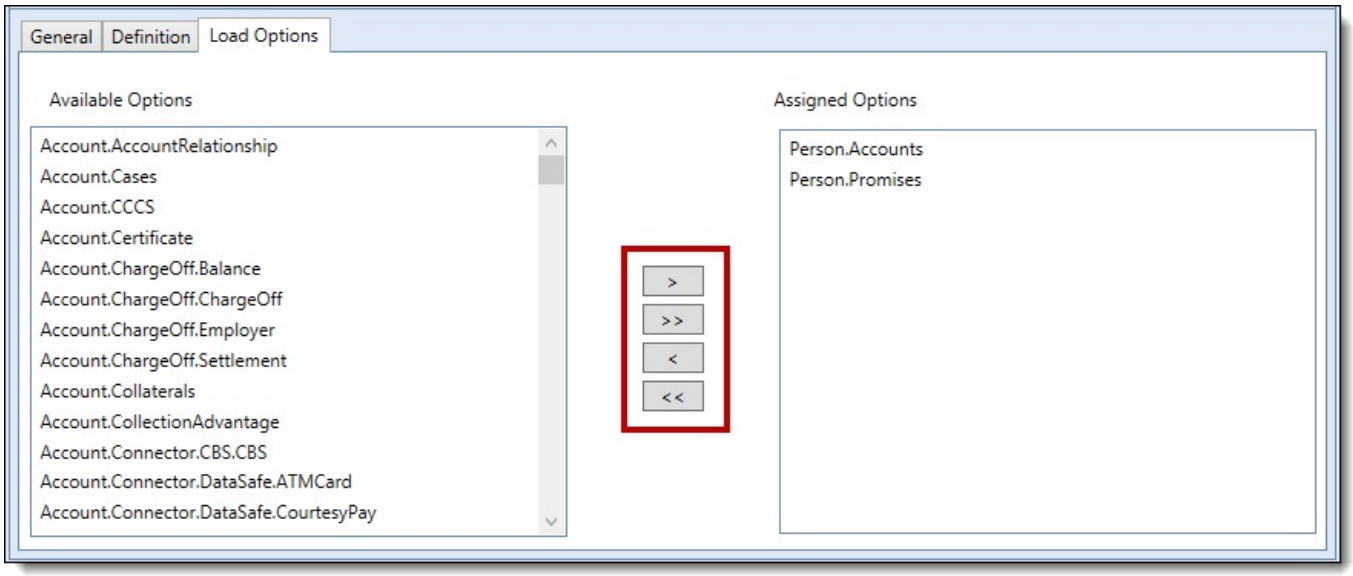
It is recommended to click Check to review the Decision Table for any duplicated or missing options before saving.

Load Options

Load Options define the data required to execute a rule and are used to improve performance by avoiding the transmission of unnecessary data. The Load Options for each rule are defined within the Load Options tab.

Load Options must be assigned for each rule. Rules that do not have Load Options assigned do not function as expected. When Load Options are not assigned for any rule containing a field, a value does not display for that field after the rule is executed. For example, in the demonstration above, if the Person.Accounts and Person.Promises Load Options are not assigned, the rule is unable to determine a value for the number of promises in order to display a message within the panel. For information regarding the fields available within Rules Manager to assist with assigning Load Options, please see the Data Dictionary.

The Load Options tab displays two boxes: **Available Options** and **Assigned Options**:



To assign Load Options to the rule, select the load option from the Available Options box and move it to the Assigned Options box using the arrows that display.

> All available Load Options display within the Available Options box, including load options for various connectors that may not be applicable to every institution.

In this demonstration, the rule being created is at the person level and, in order to retrieve promise information for each of the person's accounts, account and promise entities are needed to execute the rule. The correct Load Options to assign for this rule are **Person.Accounts** and **Person.Promises**.

By assigning these load options, the information regarding all person accounts and promises made by the person are transmitted before the rule is executed, in order to display the warning message regarding outstanding promises.

When defining an action of **execute rule set** to appear in a rule, the Load Options assigned to the rule being configured, or the parent rule, must include the same Load Options assigned to that of the rule set(s) being called, or the child rule(s).

For example, in the screenshot below, the new Queuing rule being created is the parent rule and the **Accounts Delinquent10to30** and **Accounts Delinquent30to90** rule sets being called are the child rules. When assigning Load Options for the new Queuing rule, the Load Options assigned for the Delinquent10to30 and Delinquent30to90 rules must also be included in order for the rule to execute successfully.

Finalizing a Rule

Upon completion of all rule logic, click Save and Close within the Edit Rule window to retain the new rule logic and return to the Rules Management screen. Once saved, the new rule populates within the Rules grid. Click Save within the Rules Management screen to save the new rule logic to the Rule Application.

> Clicking Save or Save and Close within an individual rule does not save the new rule logic to the Rule Application. Once all changes to the rule logic have been made, and/or lookup syncs are complete, click Save within the Rules Management screen to save the new rule logic to the Rule Application.

Clicking Save within the Rules Management toolbar initiates the compilation process where the rule application is updated to include the new rule logic. Once the process is complete, the updated rule logic is available for execution.

> When a new rule is created, additional users in the rule application may not see the new rule until they leave the rule category and navigate back.

Compiling the Rule Application

When the rule application is saved, a compilation process is initiated to update the current rule application and apply all new and modified rule logic.

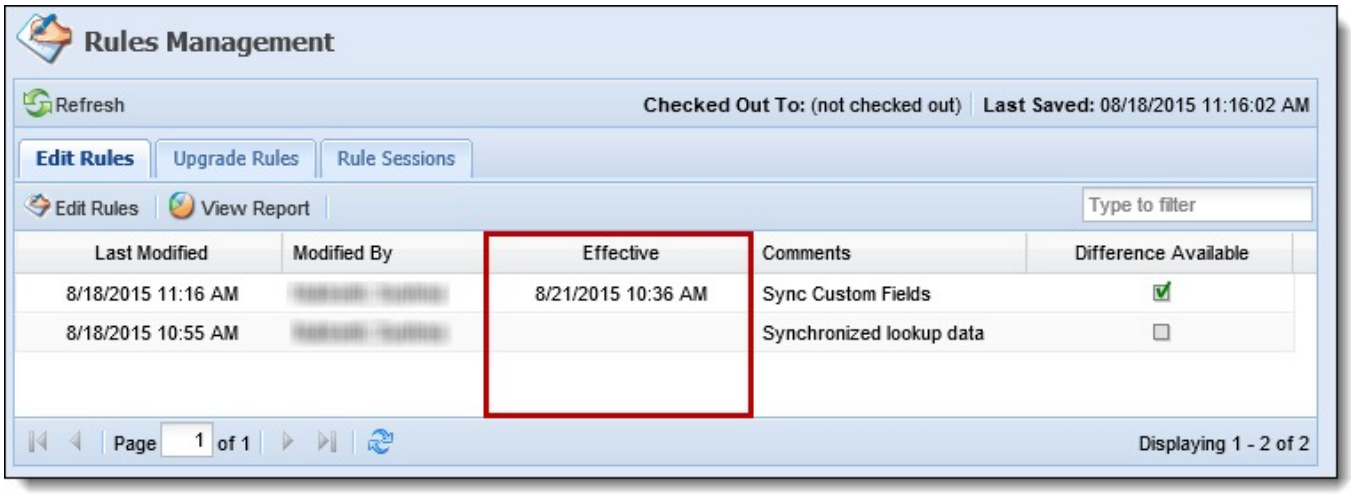
> The compilation process occurs prior to the new or modified rule being executed to improve performance in Temenos Infinity during rule execution.

Each time the rule application is saved, this process is automatically performed behind the scenes, resulting in a delay between the time that the rule application is saved and the time that the modified rule logic is applied in Temenos Infinity.

> The amount of time delay that occurs can be viewed within the grid that appears on the Rules Management Home page. The Last Modified date displays the date and time that the rule application was saved and the Effective Date displays the date and time that the compiled rule application was put to use in Temenos Infinity.

While the rule application is compiling, the logic within the previous rule application continues to be applied throughout the system. Once the compilation process is complete, the logic within the existing rule application is automatically discarded, and the updated logic within the compiled rule application is seamlessly put to use. The date and time that the compiled rule application became current populates within the Effective Date column in the grid on the Rules Management Home page.

> The time that it takes to compile the rule application varies and depends on the size of the rule application as well as the complexity and availability of server resources for the institution.



Copying Rules

> Before copying a rule, it is recommended to review the Creating Rules section of this topic for an overview of the information defined within each tab, and to develop an understanding for how to configure rule logic.

> If another user is editing a rule, the rule can still be copied.

To copy a Rule:

- Click to highlight a Rule within the Rules grid.
- Click Copy within the Application Toolbar. The Copy Rule window appears.
- Navigate through the tabs and make any required/necessary changes.
- When finished, click Save and Close to retain the new rule logic, and return to the Rules Management screen.

Editing Rules

> Before editing a rule, it is recommended to review the Creating Rules section of this topic for an overview of the information defined within each tab and to develop an understanding for how to configure rule logic.

> Once a rule is open by a user, a lock is placed on the rule in the rule application. If another user attempts to edit the rule while the lock is in place, the Edit Rule window opens in read-only mode, and the **Save** buttons are disabled within the window. A message also appears in the corner of the window to identify the username of the user who has the rule checked out for editing. For more information, please see the Understanding Rule Sessions section of this topic.

To edit a Rule:

- Click to highlight a Rule within the Rules grid.
- Click Edit within the Application Toolbar.
- The Edit Rule window appears. Navigate through the tabs and make any required/necessary changes.
- When finished, click Save and Close to retain the updated rule logic, and return to the Rules Management screen.

Deleting Rules

Clicking Delete permanently deletes the rule logic from the Rules Management Application. It is recommended to disable a rule from the Edit Rule window rather than permanently delete it in order to save the rule logic. For more information on how to disable a rule, please see the Creating Rules section of this topic.

If a rule is being edited by another user, the rule cannot be deleted from the rule application, and an error message is received upon clicking **Yes** to confirm that the rule should be deleted.

To delete a rule:

- Highlight the rule within the Rules grid, and click Delete.
- Upon clicking Delete, a confirmation message displays to confirm if the rule should be deleted:
- Click **Yes** to delete the rule, or **No** to retain the rule and return to the Rules Management Application screen.

Rules Management - Rule Trace Analyzer

The Rule Trace Analyzer is a detailed, analytical tool that provides administrators with an efficient method of testing and troubleshooting rules directly within the Rules Management Application. This functionality enables the ability to easily uncover issues within a business rule that may impact the rule's ability to execute properly. With this functionality, administrators can create a rule trace within Rules Manager that analyzes a specific rule and returns information about how the rule executes.

The Rule Trace Analyzer functionality provides the ability to evaluate data after a rule is executed. Running a trace on a rule written under the Workflow category might not populate an expected result as the actual test data is not being executed when the trace is run.

To see this functionality in action, view the Rule Trace Analyzer Video Tutorial.

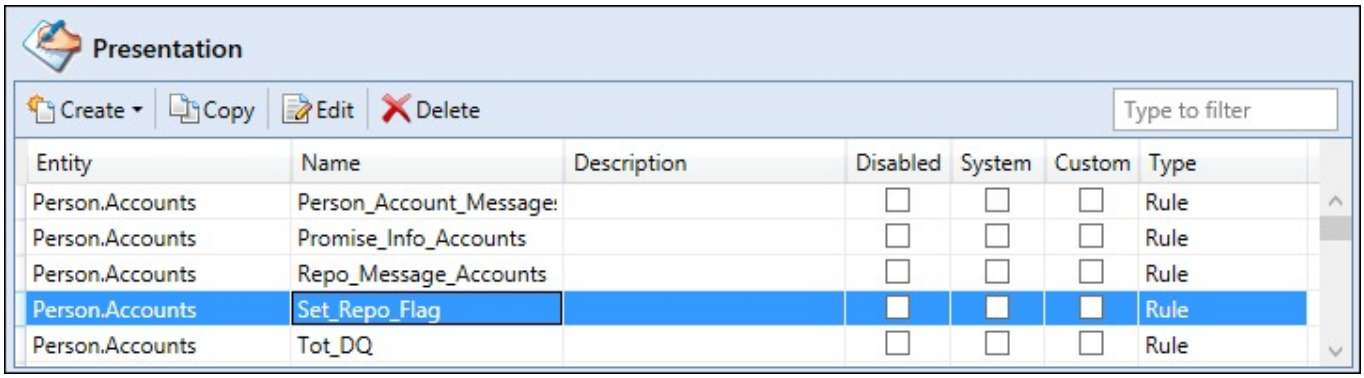
Generating a Rule Trace

A Rule Trace can be run to analyze a specific rule within the Rules Management Application and return information about how the rule executed.

To generate a rule trace within Rules Manager, click on the category associated with the desired rule to populate the Rules grid.

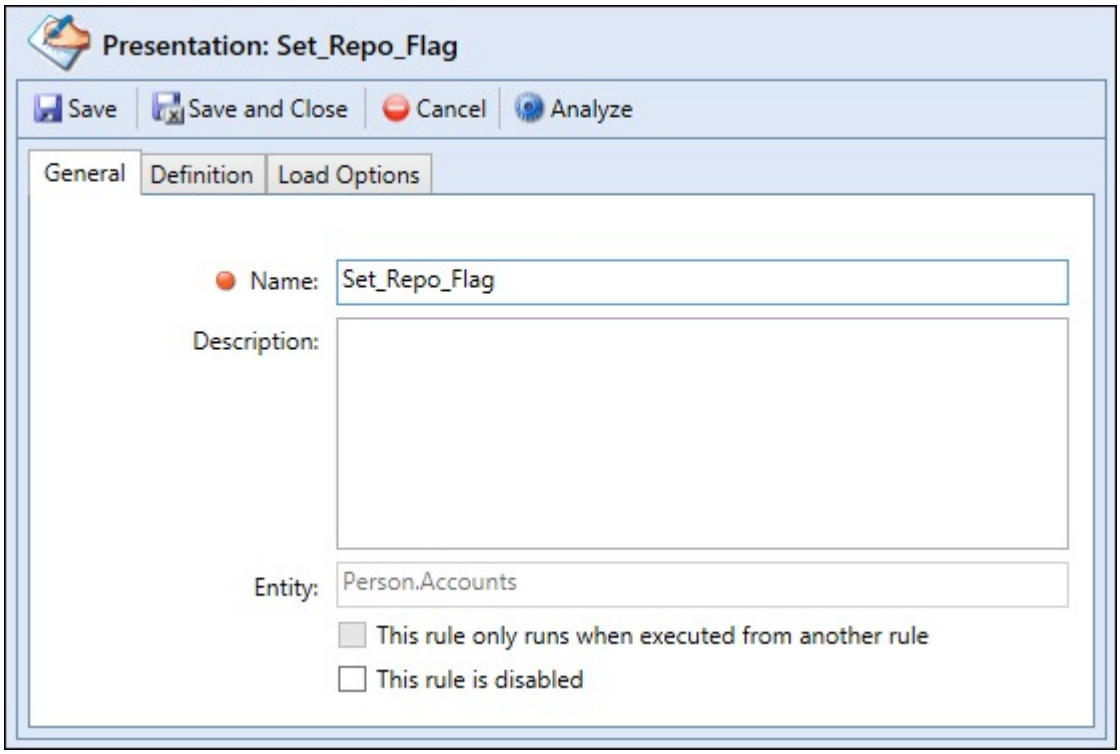
For an overview of the Rules Management Application, please see the Getting Started with Rules Management topic within this guide.

Double-click on the desired rule within the Rules grid, or highlight the rule and click Edit.

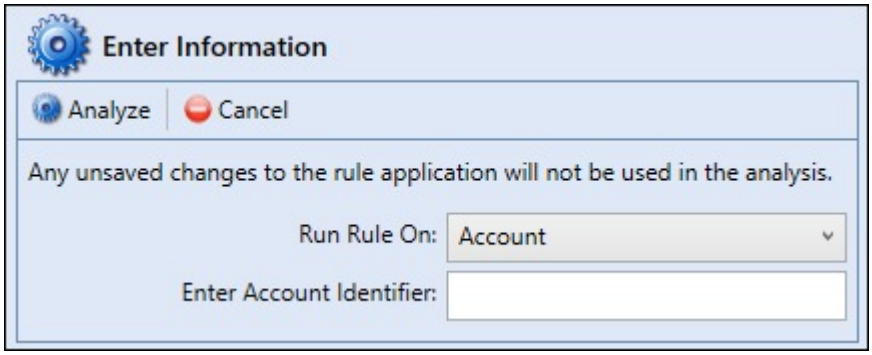


Within the Edit Rule window click Analyze.

Any unsaved changes to the rule application are not used in the analysis of the rule.



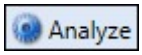
A window appears to identify the object on which the rule is to be run:



Within this window, enter the following information to run a trace on the rule:

Field	Description

Run Rule On	Select an option from the drop-down list to identify the object on which the rule is to be run. For example, if the rule should be run on a specific account, select Account. If the rule should be run on a person's entire relationship with the institution, select Person. The options within this drop-down include the following: • Account • Case • Person • Ticket This drop-down defaults to Account and controls the Number/Identifier required in the below field. For example, if Account is selected within this drop-down, an Account Identifier is required, but if Case is selected, a Case Number must be entered.
Enter Number/Identifier	Enter the specific number/identifier on which the rule is to be run. The title of this field changes depending on the object selected in the above field. For example, if Account is selected, this field displays as **Enter Account Identifier**. If the rule is to be run on a case, this field displays as **Enter Case Number**. If running a rule on a Person, a Person ID is required. To populate this number within a person screen, configure the Person ID field to appear in a panel within the screen. When configured, this field appears in the panel as read-only to display the Person ID value from the database for the person in context.

After all fields are complete, click 

to generate the rule trace.

If an invalid number/identifier is entered, an error message is received to alert that the entered number/identifier cannot be found.

Once a rule trace has been generated successfully, the Rule Trace Review screen opens in a separate Internet Explorer window.

The first time a rule trace is generated, a Rule Trace folder is created and stored on the sharepath. Each time a rule trace is run, the data is stored in the database and a file is placed in the Rule Trace folder.

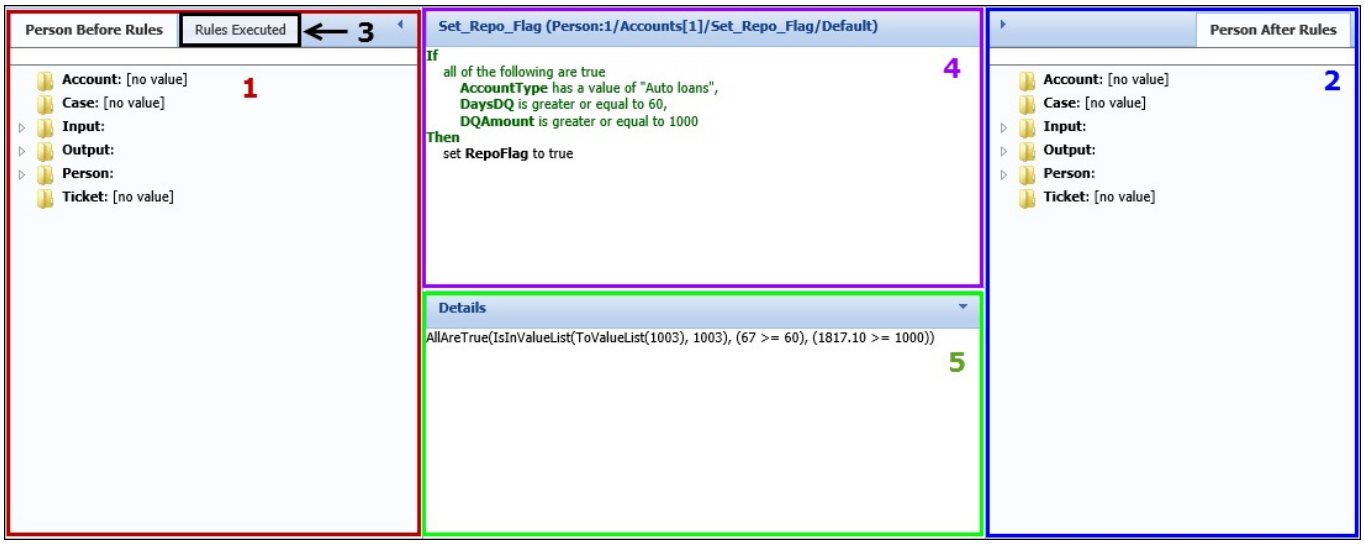
A record of each rule trace is stored for a default value of 45 days from the last day the trace was opened. This enables the ability to view past rule trace records with the assistance of a Temenos Customer Care Representative.

Rule Trace Review Screen

The Rule Trace Review screen displays detailed information about the rule's execution for testing and/or troubleshooting purposes and enables the ability to analyze specific details related to the rule's execution. Within this screen, administrators are provided with the ability to compare the values of an object before and after the rule is run as well as analyze each rule condition to understand how the rule executed.

The Rule Trace Review screen includes the following sections:

- 1- Object Before Rules
- 2- Object After Rules
- 3- Rules Executed
- 4- Rule Review
- 5- Details

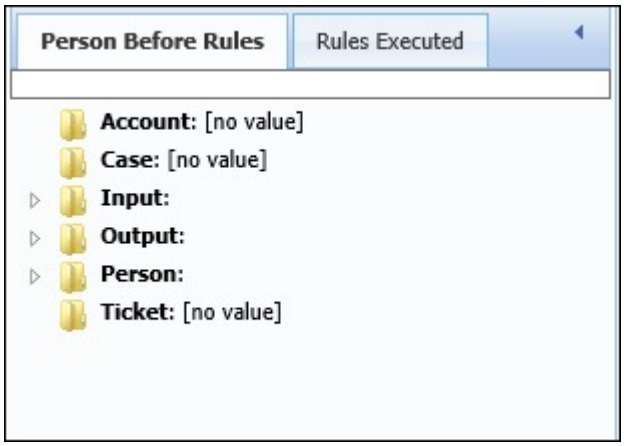


Object Before Rules/ Object After Rules

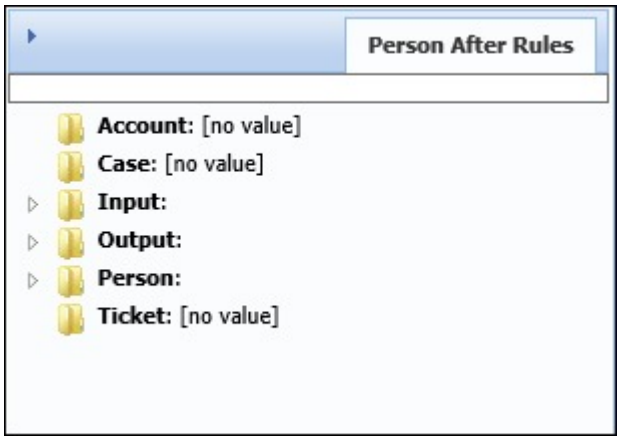
The Object Before Rules and Object After Rules sections include folders containing the object values on which the rule is run. Each folder can be expanded to display the specific field values that populated both before and after rule execution.

> The title of these sections and the folders that display are dependent on the rule trace object. For example, when a rule trace is run on a person, these sections appear as Person Before Rules and Person After Rules and the object values that populate are those related to the person.

The Object Before Rules section appears in the top left of the Rule Trace Review screen and provides an overview of the object values that appeared before the rule was executed.



The Object After Rules section appears in the top right of the Rule Trace Review screen and provides an overview of the object values that were updated after the rule executed.



These sections can be used to compare the value of a specific field, before and after rule execution, to verify whether it updated to an expected value. For more information, please see the Comparing Object Values Before and After Rule Execution section within this topic.

Rules Executed

The Rules Executed section provides a list of each rule that ran as a part of the initial rule. For example, when a rule is run on an account, a separate rule is run on every person related to the account.

> When multiple rules are run within the rule being analyzed, by default, the first rule that ran is selected within the list of rules executed. If any pre-processing rules were run, the default rule selected is the first rule run that is not a parent rule as shown in the below example.

A rule that appears in the tree as a child of another rule identifies that the parent rule called the child rule.

Select a rule within the Rules Executed list to populate a visual representation of the rule within the Rule Review section of the Rule Trace Review screen. When a new rule is selected, the existing rule and any loaded details are cleared from the Rule Review and Details sections before information for the new rule is displayed.

Rule Review

The Rule Review section is the main area of the rule trace that displays a visual representation of the rule selected within the list of rules executed. The visual that appears is dependent on the type of rule that ran. For example, if a rule is a Business Language rule, the Rule Review section appears as follows:

Set_Repo_Flag (Person:1/Accounts[1]/Set_Repo_Flag/Default)

```
If
   all of the following are true
      AccountType has a value of "Auto loans",
      DaysDQ is greater or equal to 60,
      DQAmount is greater or equal to 1000
Then
   set RepoFlag to true
```

The example below displays how the Rule Review section appears for a Decision Table:

Workflow_Decision (Person:1/Accounts[1]/Workflow_Decision/Default)

	Balance	Days DQ	Open Promise?	Set Workflow Decision	
1	> 1000	> 30	No	Manual	
2	> 1000	> 30	Yes	Yes	
3	> 5000	> 30	Yes	Manual	

Elements within the rule are colored to indicate whether the condition or decision table row evaluated to true, evaluated to false or did not execute.

Reference the table below for an overview of the colors that may appear within the each rule, as well as a description of what each color indicates about the Business Language Rule or Decision Table:

Color	Business Language Description	Decision Table Description
Red	Condition evaluated to false.	Conditions within the row evaluated to false.
Green	Condition evaluated to true.	Conditions within the row evaluated to true.
Gray	The section of the rule did not execute.	N/A
Black	The section of the rule was able to execute since condition(s) evaluated to true.	Conditions within the row were not considered for execution since an earlier condition was met.

Selecting a condition in the Rule Review section populates the specific values related to that condition within the Details section. This provides administrators with the ability to verify the exact values that caused a true or false evaluation.

Details

The Details section displays InRule execution details about the Business Language rule or Decision Table that was executed. When an "If" condition or decision row is selected within the Rule Review section, the details pane expands and displays the execution details.

> This section only displays details related to a condition or decision row that ran within the rule. No details are provided when a condition or decision row that did not run is selected within the Rule Review section.

The details within this section are populated from InRule and contain the object values that were updated during rule execution.

Details

```
AllAreTrue(IsInValueList(ToValueList(1003), 1003), (67 >= 60), (1817.10 >= 1000))
```

Analyzing a Rule

Within the Rule Trace Review screen, business language rules and decision tables can be analyzed according to the colors that appear within the Rule Review section of the screen, the InRule details that appear within the Details section as well as by comparing values that populate for the object both before and after rule execution.

This section contains the following information to assist administrators with analyzing a rule using Rule Trace Analyzer:

- Business Language Rules
- Decision Tables
- Comparing Object Values Before and After Rule Execution

Business Language Rules

Conditions in a business language rule are grouped by "If" statements. In the example below, since the entire "If" condition appears green, it can be determined that the person the rule was run on has an account that meets all of the specified criteria, therefore the "Then" portion of the rule is able to execute as indicated by the "Then" appearing green and the action appearing black.

Set_Repo_Flag (Person:1/Accounts[1]/Set_Repo_Flag/Default)

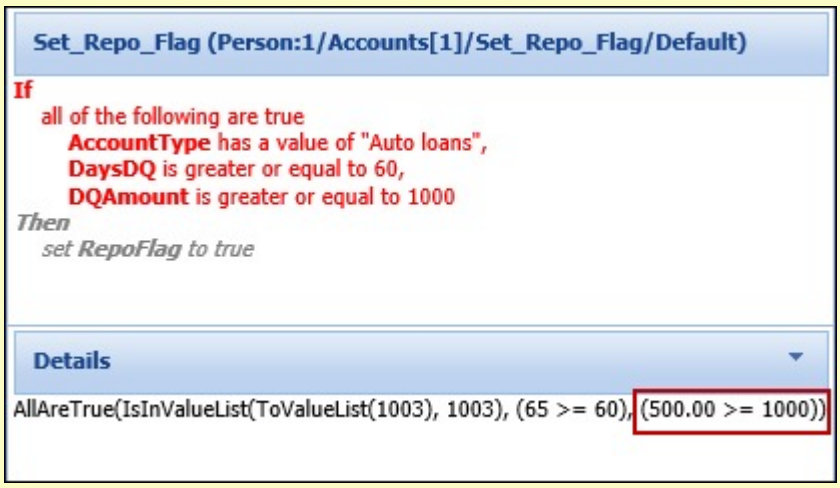
```
If
   all of the following are true
      AccountType has a value of "Auto loans",
      DaysDQ is greater or equal to 60,
      DQAmount is greater or equal to 1000
Then
   set RepoFlag to true
```

Clicking a condition populates the InRule details within the Details section of the Rule Trace Review screen. For example, in the screenshot below, The values for Days DQ and DQ Amount populate to indicate that amounts are greater or equal to the amount identified within the rule:

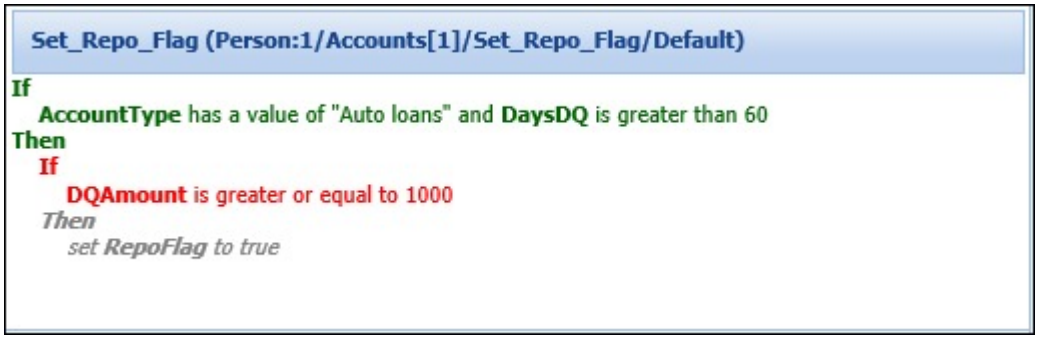
Details

```
AllAreTrue(IsInValueList(ToValueList(1003), 1003), (67 >= 60), (1817.10 >= 1000))
```

Since "If" conditions are grouped, when one condition evaluates to false, the entire "If" condition appears red. To identify which condition resulted in the false evaluation, click on the condition to populate the values within the Details section. Use the values within the Details section to identify which condition did not meet the specified criteria. In the example below, though the entire "If" condition evaluated to false, the information in the Details section identifies that DQ Amount was the condition that resulted in the false evaluation as 500 is less than 1000:



When multiple "If" conditions are included in a rule, and the "If" conditions evaluate differently, the rule appears as follows:



In the example above, the first "If" condition evaluated to true, as identified by the green, therefore the second "If" condition was able to execute. Since the second "If" condition evaluated to false, as identified by the red, the "Then" action did not execute and appears in gray.

Decision Tables

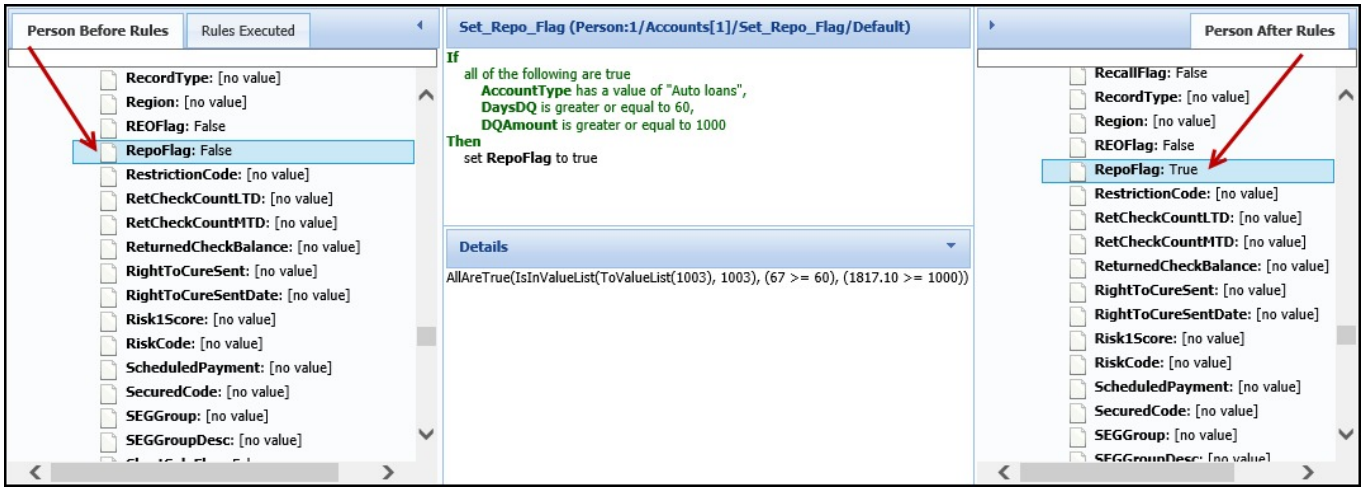
Conditions in a Decision Table are grouped by Decision row. In the example below, it can be determined that all conditions within the first decision row evaluated to true, as identified by the green. Since the rule conditions were met, the next rows are not considered for execution and display in black.

Workflow_Decision (Person:1/Accounts[1]/Workflow_Decision/Default)

	Balance	Days DQ	Open Promise?	Set Workflow Decision	
1	> 1000	> 30	No	Manual	
2	> 1000	> 30	Yes	Yes	
3	> 5000	> 30	Yes	Manual	

Comparing Object Values Before and After Rule Execution

When a rule is configured to change a value, the related values can be compared in the Object Before Rules and Object After Rules sections of the screen. For example, the rule executed was configured to set the value of the RepoFlag field to true based on the conditions of the rule being met. Since the conditions in the example rule evaluated to true, the value for the RepoFlag field was updated within the Person After Rules section as shown below:

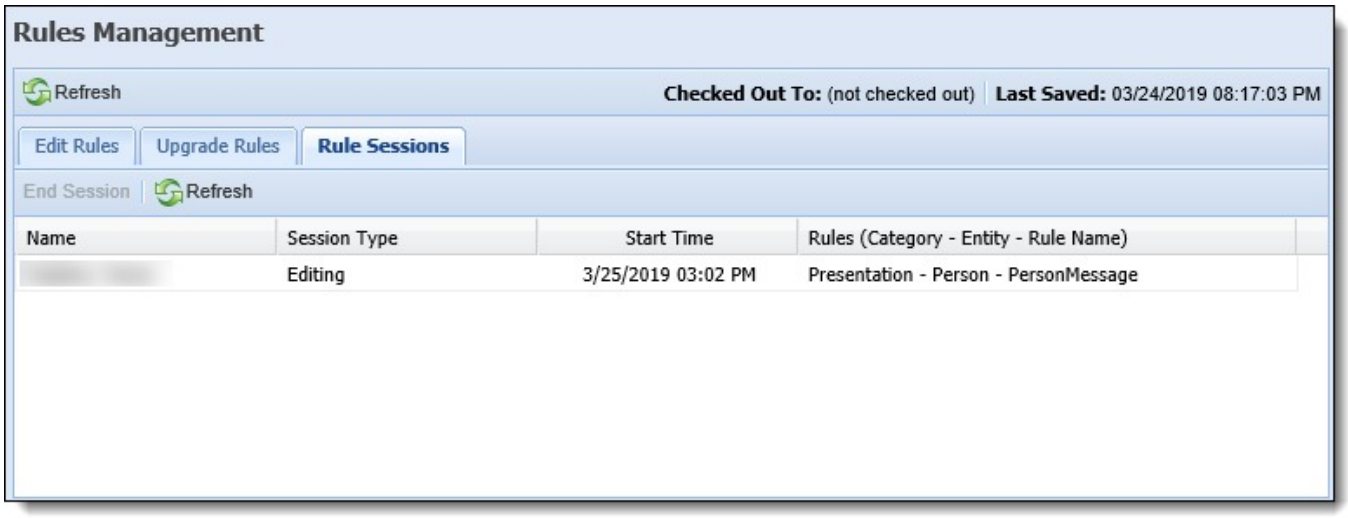


> If additional assistance is required with testing/troubleshooting a rule, or viewing a past rule trace record, please contact a Temenos Customer Care Representative.

Rules Management - Rule Sessions

Rule Sessions allow multiple users to work in the rule application simultaneously.

The Rule Sessions tab displays an overview of the active rule sessions in Rules Management, and provides the ability to release a lock on a particular rule, or an exclusive lock on the rule application, if necessary.



The grid in this tab displays the following columns of information for each active rule session in Rules Management:

Column	Description
Name	Displays the name of the user who has a session in Rules Management.

Session Type	Displays the type of rule sessions. The rule application supports the following session types: • Exclusive • Editing • Saving For more information on each session type, please see the Understanding Rule Sessions section of the Rule Authoring topic in this guide.
Start Time	Displays the date and time that the rule session began.
Rules	Displays the Category, Entity, and Name of each rule locked by the user. If a user has a lock on more than one rule, each rule is listed in the column, separated by a comma (,).

The buttons in the top of the tab allow users to perform the following actions:

Button	Description
End Session	Provides the ability to end a rule session for a user. By default, this button is disabled. If a user has access to Rules Management, the button is enabled upon selecting a row for an editing or saving session. To end an exclusive rules session, the End Exclusive Rule Authoring Session permission must be set to Change for the user. This permission is set under the Collections category of the Permissions tab in System Management > Users, or System Management > groups > Security Groups. Prior to ending a rule session, it is recommended to inform the user about the action, as he or she is unable to save or edit in the rule application once the session ends. If a user is active in the rule application when his or her session ends, an error is received upon saving, or trying to access any rules in Rules Manager to inform that the session has expired. Rules can be accessed, but only in read-only mode.
Refresh	Provides the ability to refresh the information in the Rule Sessions tab.

Rules Management - Tips and Tricks

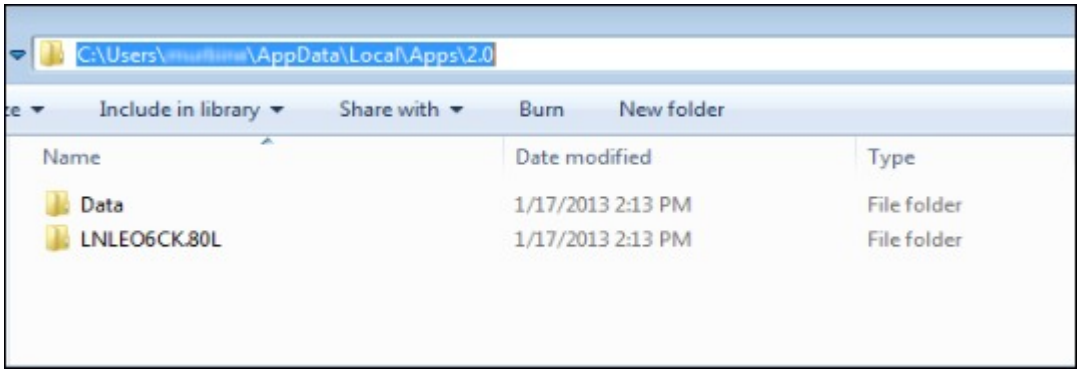
This topic includes the following tips and tricks for creating Business Rules:

- Removing Rules Management
- Two Rules changing the Same Field
- Displaying the Caret Extender (^)
- Selecting from a Value List
- Selecting from a Value List in the Set the Value of a Field Template
- Deleting/Editing a Field

- Modifying a Rule Type
- Completing Placeholders
- Using the Concatenate Function
- Using Conditional Expressions
- Using Expression Builder
- Converting Date Formats
- Naming Rules

Removing Rules Management

To remove the Rules Management application, navigate to windows explorer and enter the following path into the address bar: **C:\Users\user name (John Doe: Jdoe)\AppData\Local\Apps\2.0.** Delete the folders within this location.



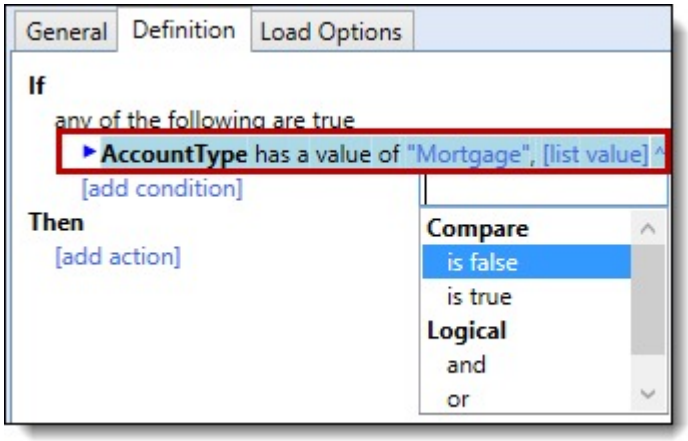
> The next time Rules Management is launched, it must be installed.

Two Rules changing the Same Field

If two rules are configured to change the same field and are being run at the same point in processing, an infinite loop occurs. To avoid this, put all rule logic to set the field into one rule.

Displaying the Caret Extender (^)

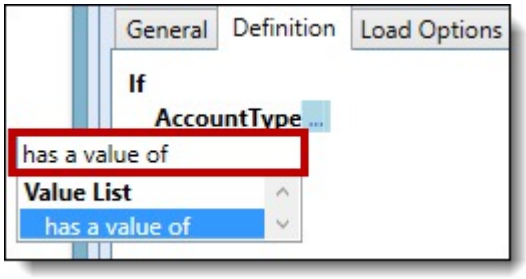
After selecting a **[value]**, press the right arrow on your keyboard to highlight the selection and display the caret extender (^). Select the enter key to display the list of value options.



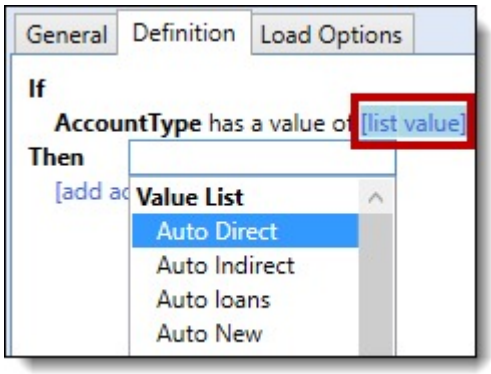
Selecting from a Value List

To define a value for a field, select from a list of lookup values. After a field is selected, click the **...** to display a list

of available fields to add to the expression. Enter **has a value of** or **does not have a value of** within the top of the drop-down list:

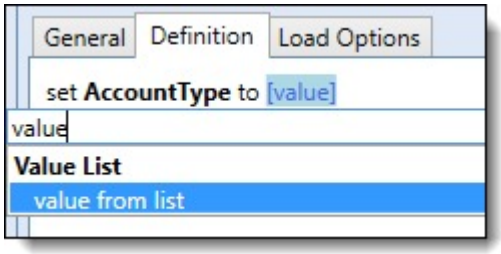


A placeholder for **[list value]** appears. Click [list value] to select the appropriate lookup value from the Value list that displays:



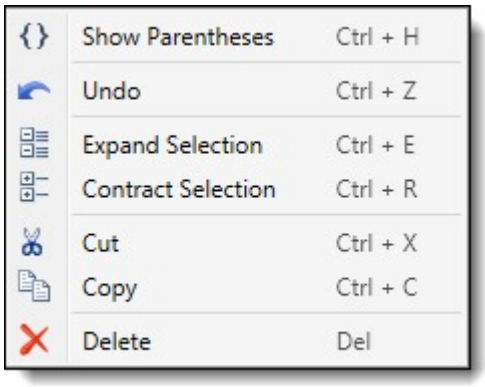
Selecting from a Value List in the Set the Value of a Field Template

When setting the value of a lookup field using the **set the value of a field** action template, enter **value** within the top of the list drop-down and select **value from list** to select a value from the field's lookup list.



Deleting/Editing a Field

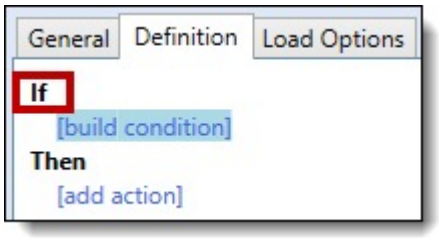
To undo or add to a selection, right click on the selected item and choose an edit option from the list that displays:



When deleting a field, expression, etc., all additional criteria after the deleted item is also removed.

Modifying a Rule Type

To modify the rule type selected, click the "If" at the top of the rule being authored.



Changing the type of rule determines whether or not the existing criteria is retained or deleted. For example:

- If the current rule type is "If...Then" and the new rule type is "If...Then...Else," the "Else" is added to the bottom without losing your changes within the "If...Then" portion of the rule.
- If the current rule type is "If...Then...Else" and the new rule type is "If...Then," the "Else" portion of the rule is deleted while the "If...Then" portion is retained.

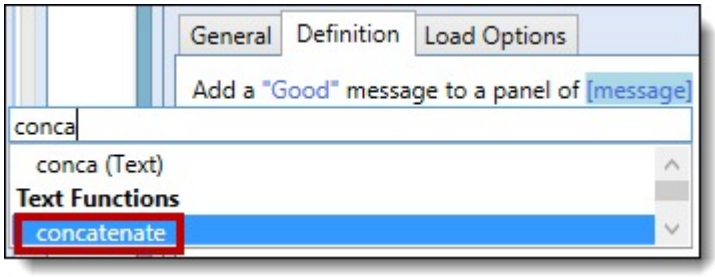
Completing Placeholders

When using templates, all placeholders MUST be completed or a compile error is returned when saving the rule or decision table.

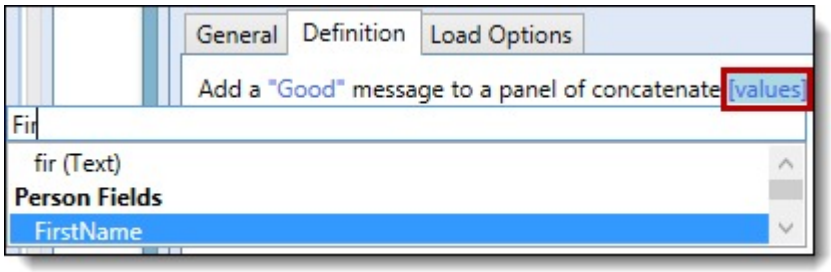
Using the Concatenate Function

When using the **display a message** or **add a message to a panel** templates, it is possible to combine fields, text, and line breaks by using the **concatenate** function. This function concatenates all of the values passed to it into a single string that is displayed in the message. Use the following example to understand how to use the concatenate function within the add a message to a panel template:

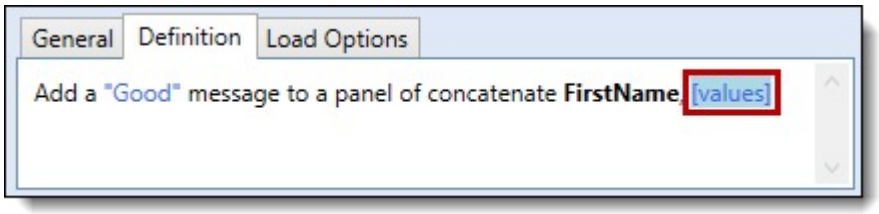
- After the add message to a panel template is selected, and a message type is defined, click [message] to configure the message for this action. Type concatenate within the top of the drop-down list to select concatenate from the available Text Functions.



- Once concatenate is selected, a **[values]** placeholder appears. Click [values] to define the value(s) to be concatenated.

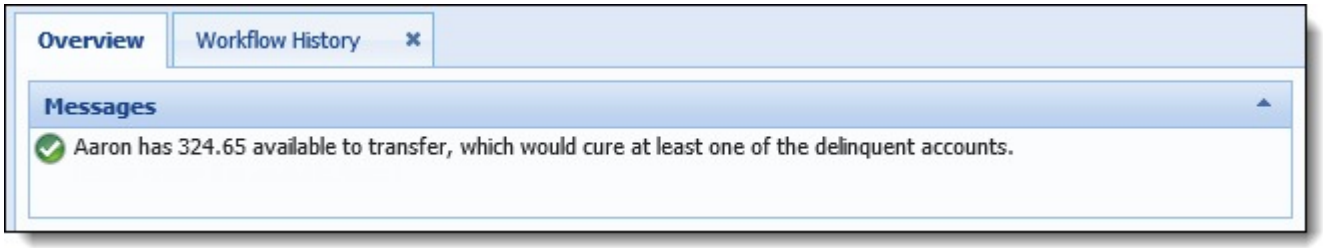


- Once the concatenated value has been defined, an additional [values] placeholder appears:



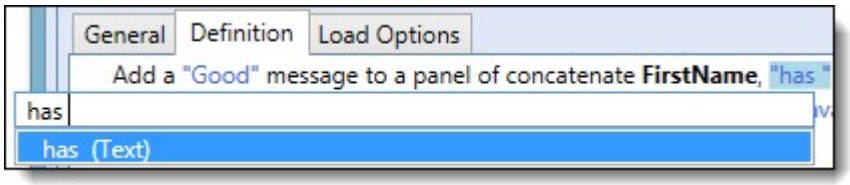
- Continue adding values to the expression until the message for the panel is complete.

- The concatenated message appears in the workspace as follows:

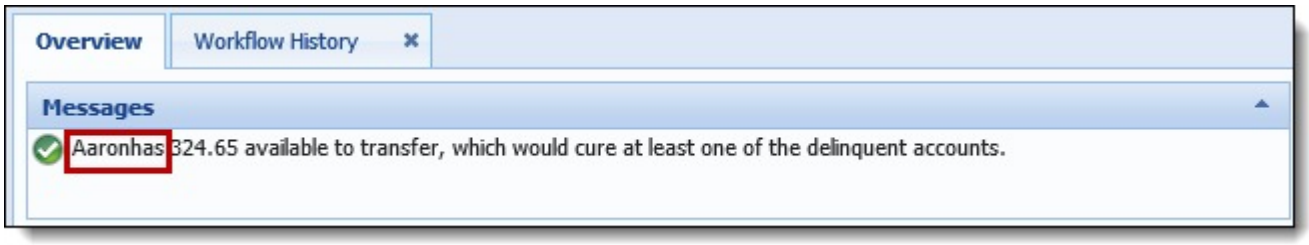


Use the following tips to help with configuring a message using the concatenate function:

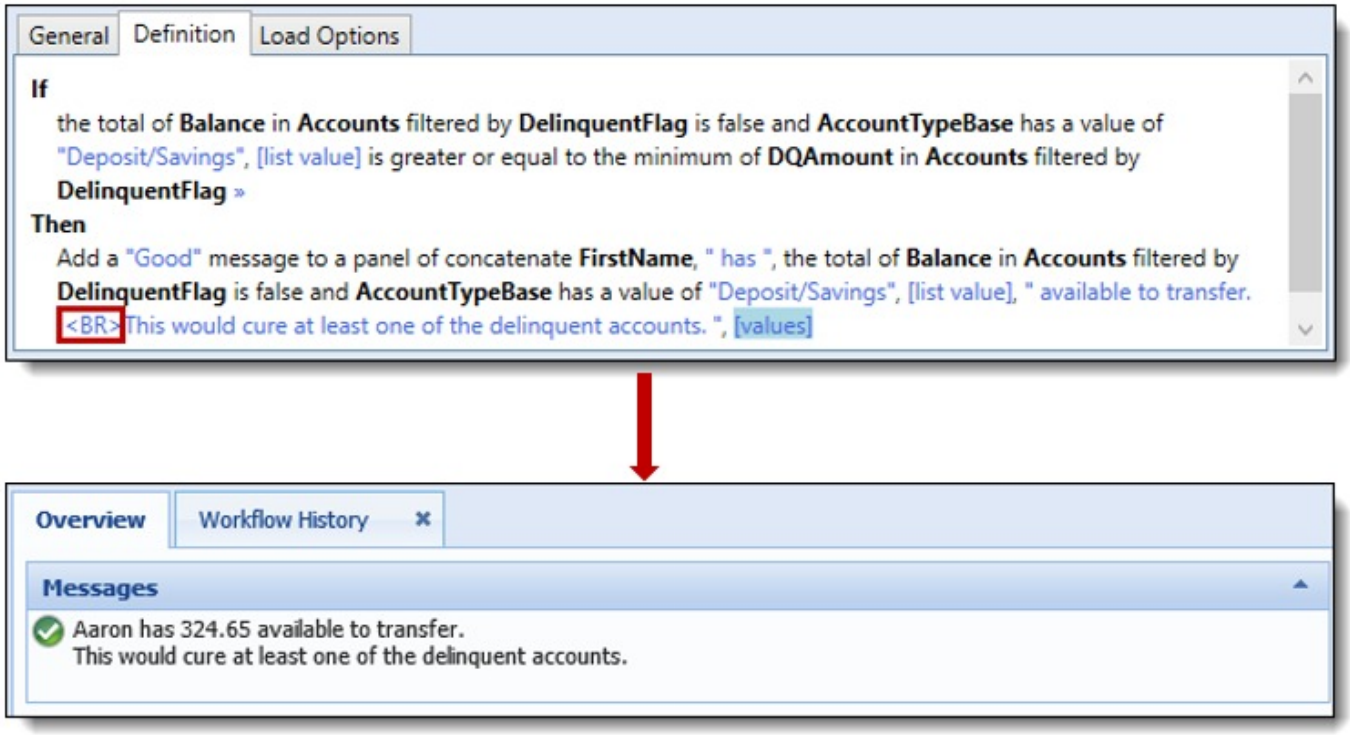
- Include a space before the first letter of the text in order to separate the text from the concatenated value. Without a space added, the concatenated values and text are combined.



- Without a space before "has," the message appears as follows:



- To insert a line break, include <BR> within the expression:



Using Conditional Expressions

When building If/Then type rules in Business Language that require the placement of parenthesis, it is recommended to use one of the following Conditional Expressions:

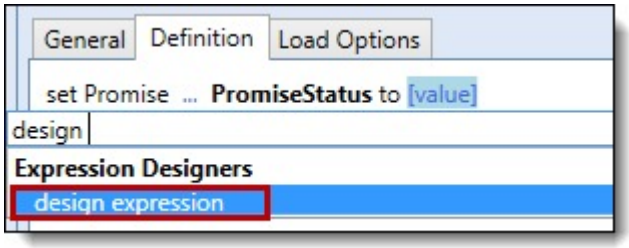
Conditional
- all
- any
- at least
- at most
- exactly
- less than
- more than
- none
- other than

Conditional Expressions can be nested and should be used instead of parenthesis to handle precedence. They can also be used in conjunction with logical operators (and/or).

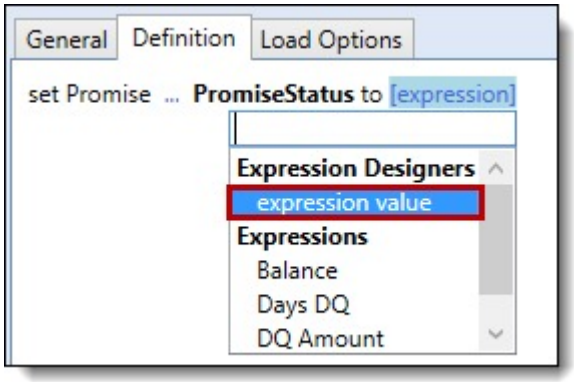
Using Expression Builder

When using the action template **set the value of a field**, use **Expression Builder** to add complex values to the expression. Use the following example to assist with accessing and using Expression Builder.

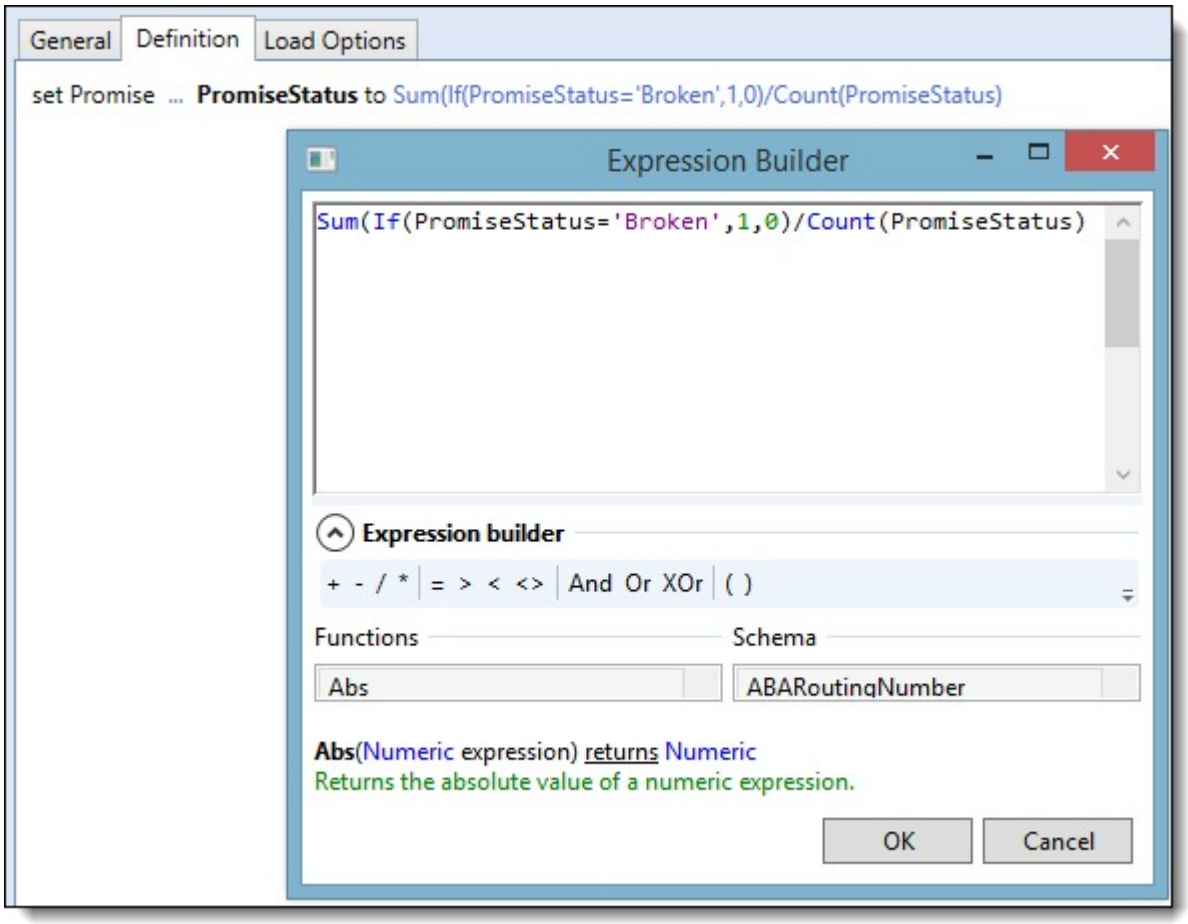
- After the set the value of a field template has been selected and a field has been defined, click **[value]** and enter **design expression** within the top of the drop-down list. Select design expression under **Expression Designers**.



- An **[expression]** link appears. Click [expression] and select **expression value** from the drop-down list to open the Expression Builder.

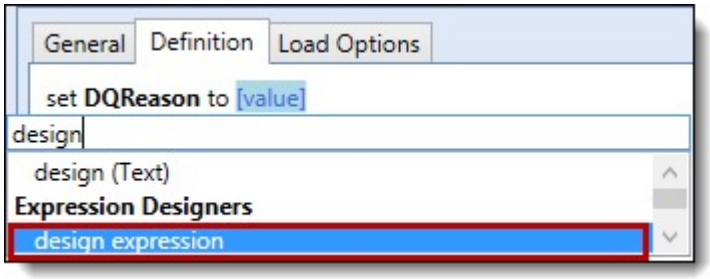


- Select the fields and functions needed to build the expression within the Expression Builder window. Click **OK**. The expression value then populates as part of the action.

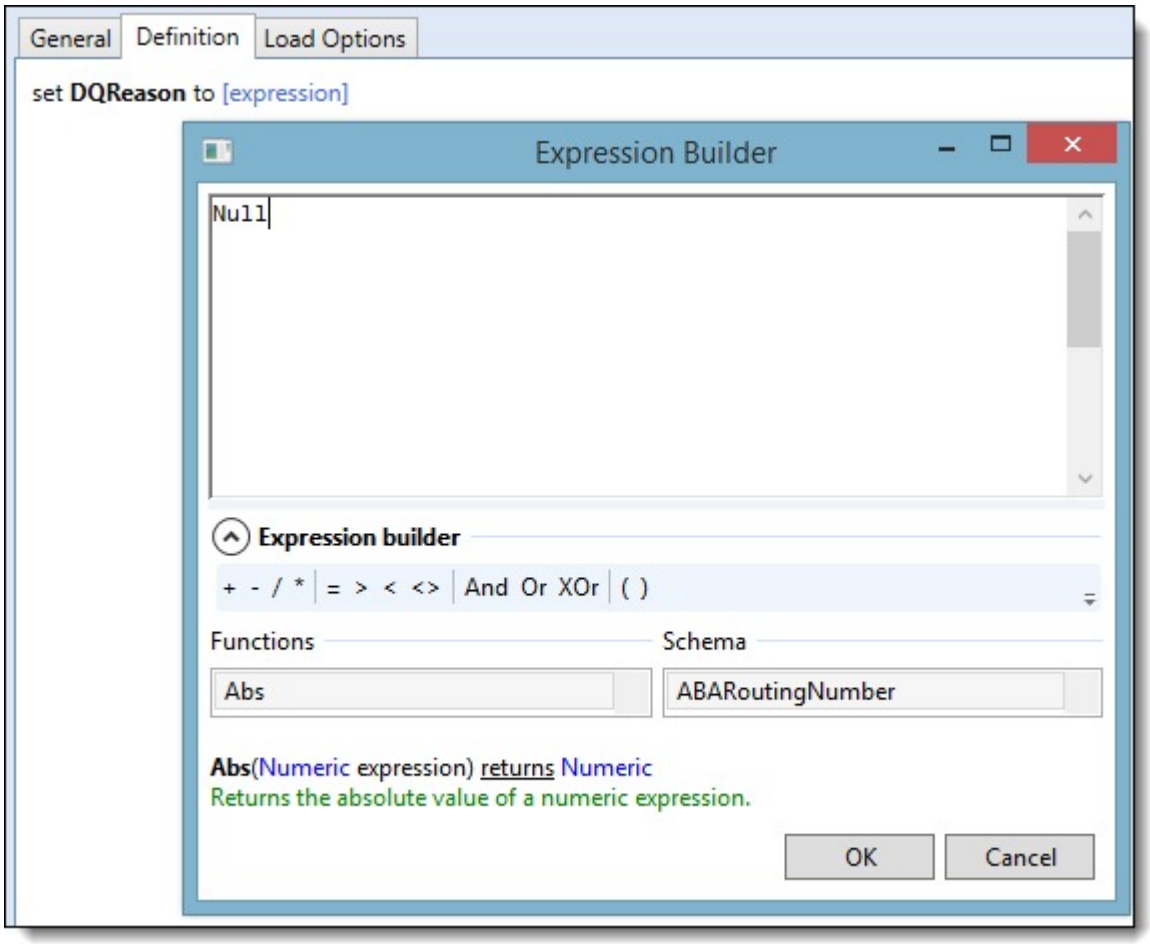


Expression Builder can also be used to populate a **NULL** value for a field using the steps below:

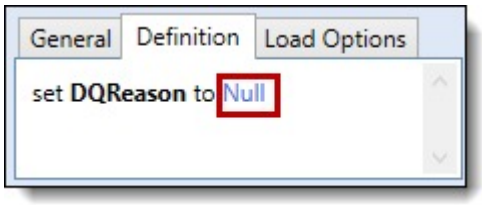
- After the set the value of a field template has been selected and a field has been defined, click **[value]** and type **design expression** within the top of the drop-down list. Select design expression under Expression Designers.



- An **[expression]** link appears. Click [expression] and select **expression value** from the drop-down list to open the **Expression Builder**. Enter **Null** within the Expression Builder window and click **OK**.

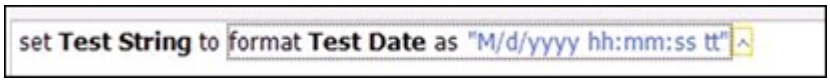


- The Null value then populates within the expression.



Converting Date Formats

Through **Business Language Editor**, a date can be converted to string format by using the **format** function. Select a format option such as Long date or Short date or enter a custom date/time format.



Naming Rules

When creating a rule, do not configure a rule name that is identical to the name of a field being used within the rule. Rules under the same entity must also be named differently in order to save the Rule Application. If this field is the same for more than one rule under the same entity, an error message is received when trying to save the Rule Application.

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Vocabulary Template Examples

Set the Case Status

The Set the Case Status vocabulary template allows institutions to automatically set the status of cases based on criteria set within the rule.

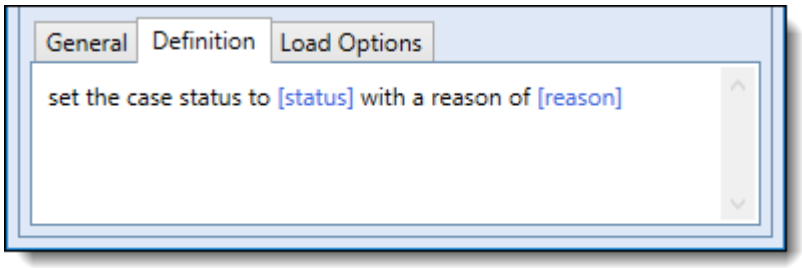
> This template may only be used in a Task Processing rule for a case. If it is used in any other scenario, the case status is not changed.

When a case is closed, its tasks are handled as follows:

Existing Task Status	How Task is Updated Post-Rule
Canceled	No changes to task status.
Completed	No changes to task status.
In Progress	Task is canceled.
Not Started	Task status changed to Will Not Start.
Waiting to Start	Task is canceled.
Will Not Start	No changes to task status.

To begin authoring a rule to set the status of cases, navigate to System Management > Collections > Rules Management, and click Edit Rules to open Rules Manager. Create a new rule using the TaskProcessing category and Root.Case entity.

When authoring the Then Statement, select the "Set the Case Status" action template. Upon selecting this template, the following vocabulary populates in the Definition tab:

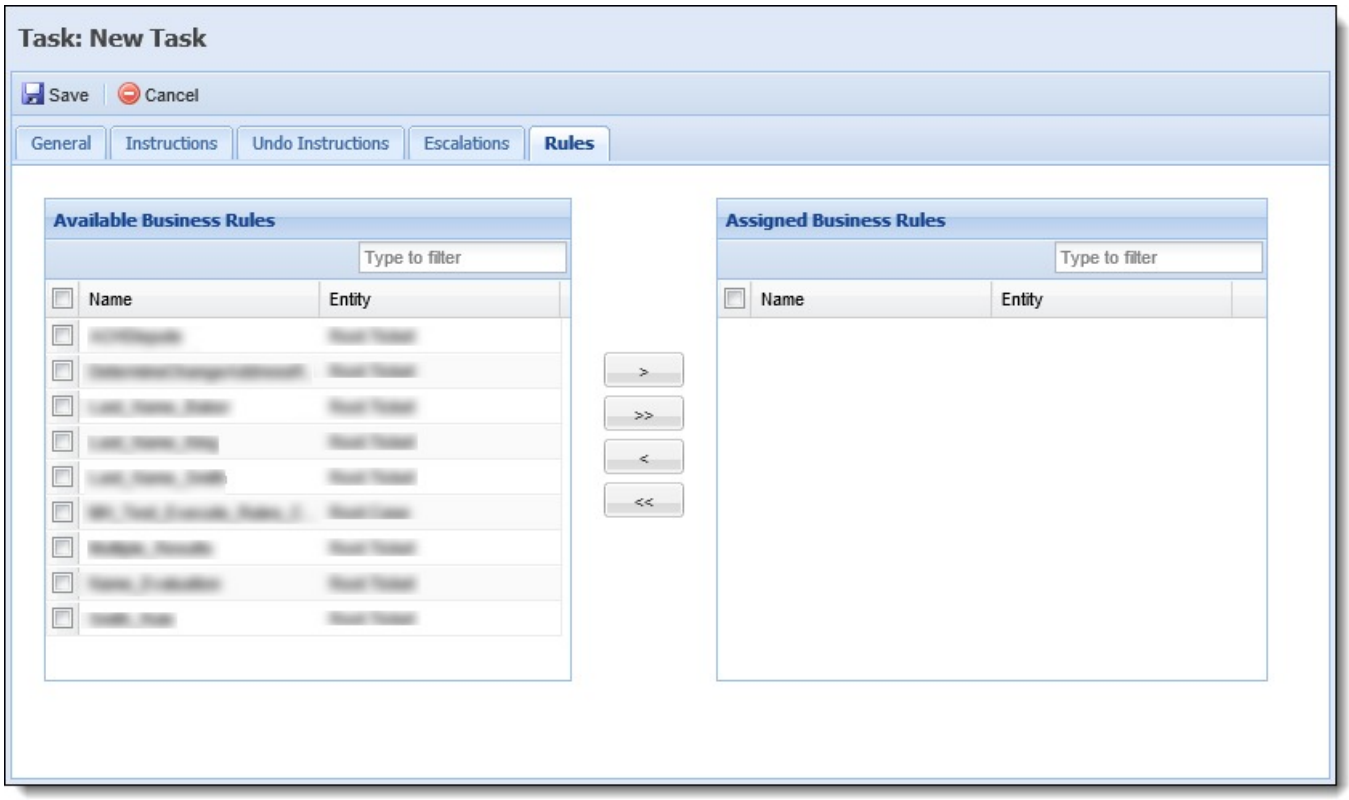


- **[status]** - Allows rule authors to select the case status from a drop-down list. This list includes all values configured for the CASE_STATUS lookup in System Management > Field Configurations.
- **[reason]** - Free-form text field that allows rule authors to explain why the case status changed.

Assigning the Set Case Status Rule

After a Set Case Status rule is created for a case, and saved to the rule application, the rule can be assigned to the desired application type within the Rules tab in System Management > Collections > Case Tasks.

Although an execute rule task can include multiple rules, it is recommended to configure a single rule to accomplish the desired task. This practice is beneficial for configuring rules and troubleshooting if there are any issues.

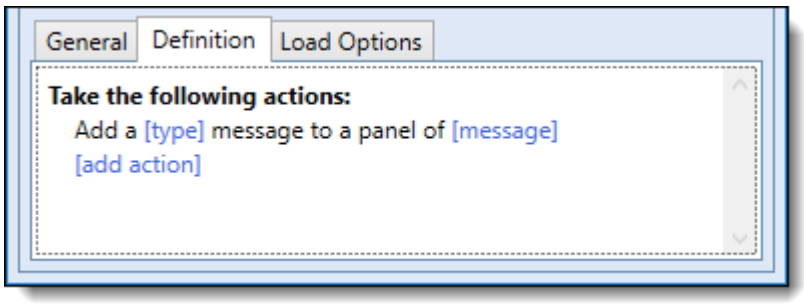


Add a Message to a Panel

The Add a Message to a Panel vocabulary template allows institutions to dynamically display messages in the Messages panel, based off the account in context in the based on criteria set within a Presentation rule.

To begin authoring that adds messages to a panel, navigate to System Management > Collections > Rules Management, and click Edit Rules to open Rules Manager. Create a new rule using the Presentation category and Person.Account entity.

When authoring the Then Statement, select the " Add a Message to a Panel" action template. Upon selecting this template, the following vocabulary populates in the Definition tab:



- **[type]** - Allows rule authors to select the type of message from a drop-down list. This list includes the following message types:
  - Bad
  - Good

  - Warning
  - None
- [message] - Free-form text field that allows rule authors to identify the message that appears to end users within the Messages panel.

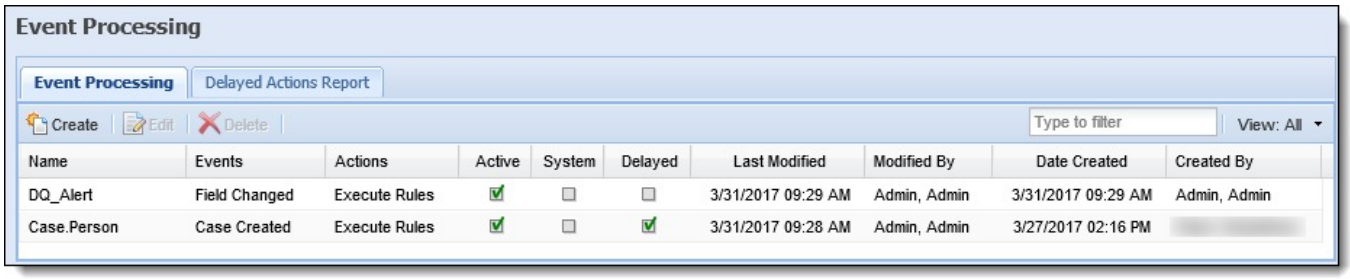
```
If
   DelinquentFlag is true »
Then
   Add a "Bad" account message to a panel of "This account is deliquent!"
   [add action]
[add action]
```

Event Processing

Event Processing provides an institution the ability to pair predefined events with corresponding actions. An event is a predefined occurrence within Temenos Infinity. When paired with an action, the event triggers the completion of the action. An action is a dependent business operation that only executes if an event is met. When a defined event occurs, the corresponding action automatically fires, or is queued until the configured time-delay expires.

For example, an institution can configure an event pair that uses an execute code action when a case creation action occurs to send a text message to account holders that a case has been created on an account of theirs.

The Event Processing page in System Management (System Management > Collections > Event Processing) enables administrators to maintain and customize event processes for their institution. This page displays a list of all system-defined and custom event/action pairings configured in Temenos Infinity, and provides administrators with the functionality to configure event processes to meet their institution's business needs.



This page is organized into the following two tabs:

- Event Processing
- Delayed Actions Report

Event Processing

The Event Processing tab displays a list of all event/action pairings configured in Temenos Infinity, and provides administrators with the functionality to create and maintain the event processes available at their institution.

The grid within this tab displays the following columns of information for each even/action pair:

Column	Description
Name	Displays the name of the event/action pair.
Events	Displays the event(s) configured to initiate the process.
Actions	Displays the action(s) to be performed during the event(s).

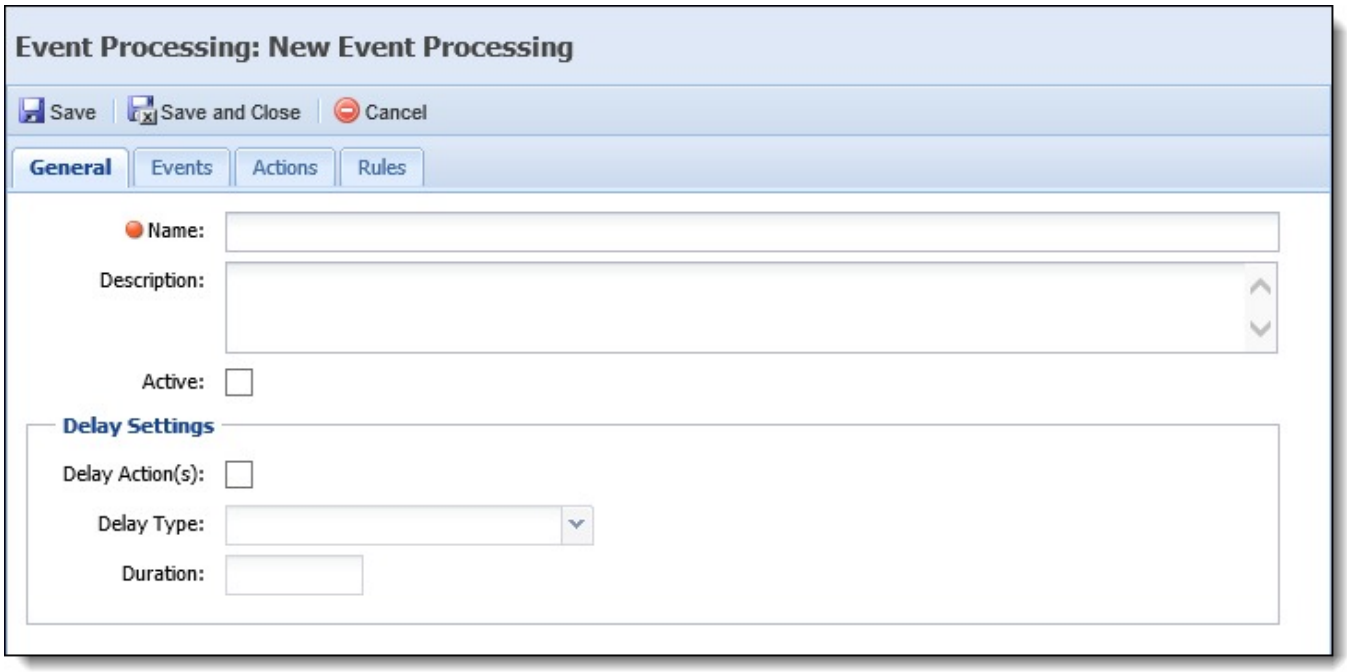
Active	Displays a ☑ to identify the pair as active in Temenos Infinity.
Delayed	Displays a ☑ to identify that the pair includes a time delay. For more information on the execution of delayed event/action pairs, please see the Executing a Delayed Event/Action Pair section in this topic. When an event/action pair includes a time delay, the status of the pairing can be viewed within the Delayed Actions Report tab. Please see the Delayed Actions Report section in this topic for more information.
System	Displays a ☑ to identify an event/action pair as system-defined. While this column appears within the Event Processing grid, there are currently no system-defined event pairings in the Collection module.
Last Modified	Displays the date of the most recent modification to the event pair.
Modified By	Displays the name of the user who made the last modification.
Date Created	Displays the date and time the event pair was created.
Created By	Displays the name of the user who created the event pair.

Event Pair Attributes

Each event/action pair contains attributes that are organized into a series of tabs. The defined attributes determine the functionality of each pair.

General

The General tab allows administrators to define basic information for the event/action pair, as well as set any time delay configurations for the event process.



The following fields are available within the top section of the General tab:

Field	Description
Name	Enter a name for the event/action pair.
Description	Enter a description for the event/action pair.
Active	Select the check box to enable the event/action pair in Temenos Infinity.

The Delay Settings section enables administrators to set the event/action pair on a time-delay. When set on a time delay, the assigned actions are not immediately performed when the event occurs, but execute according to the delay type and duration set for the pairing. This section includes the following fields:

This section is disabled for system-defined event/action pairs.

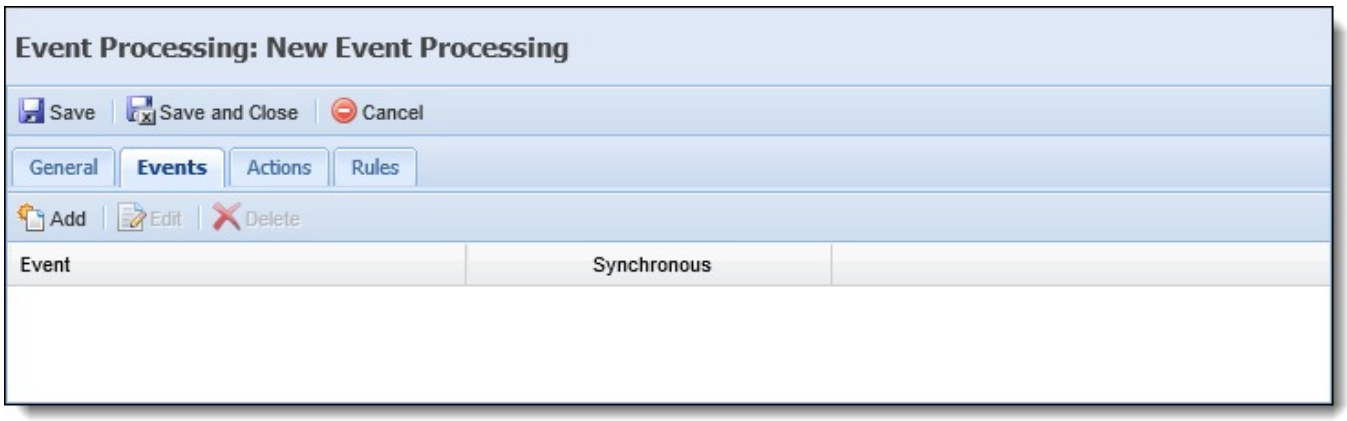
Field	Description
Delay Action(s)	Select the check box to enable a time delay for the event/action pair. By default, this field is disabled. Synchronous events cannot be set on a time delay. If this field is enabled for an Event Processing pair that is assigned a synchronous event, an error message is received that prevents the event/action pair from being created. When an event type is synchronous, a ☑ displays under the Synchronous column in the Events tab. For a complete list of the synchronous events, please see the Events section in this topic.

Delay Type	Select one of the following options to identify the amount of time the pair is to be delayed: • Days • Hours • Minutes • Seconds This field is disabled until the Delay Action(s) check box is selected.
Duration	Enter a whole number to identify the duration of the delay type. For example, if configuring an event/action pair to include a time delay of three days, select a Delay Type of Days and enter a value of 3 for the Duration. This field is disabled until the Delay Action(s) check box is selected.

For more information on time delay settings, please see the Time Delay Process section in this topic.

Events

The Events tab provides administrators with the ability to identify the event(s) that must occur in order for the defined actions(s) to execute.



A toolbar appears at the top of the tab to enable administrators to perform the following actions:

The following buttons are disabled within the Events tab for system-defined event/action pairs.

Button	Description
Add	Enables the ability to add an event to the Event Processing pair. When clicked, a window appears to allow administrators to select the Event Type to be added.
Edit	Enables the ability to edit an event assigned to the Event Processing pair. This button is only enabled for those events that require additional information, such as Field Changed. Please see the Editing Events section in this topic for more information on the event types that can be modified.
Delete	Enables the ability to remove an event from the Event Processing pair.

When an event type is added, the following information populates in the grid:

Field	Description
Event	Displays the name of the event.
Synchronous	Displays a ☑ to identify an event as synchronous. If the event type is not synchronous, a blank check box is displayed for the event. There are currently no synchronous events in the Collectionmodule.

More than one event may be added to an event/ action pairing. If more than one event is added, the event pairing is treated as an "Or Statement" meaning that if either event occurs, the action triggers.

Reference the Events table below for an overview of the system-defined event types available in the Collection module:

Additional events may be available within the Select Event Type window when certain third party connectors are active at the institution. For information on the events that are available for a connector, please see the applicable Connector Guide.

Event Type	Description	Synchronous
Case Created	Is raised whenever a new case is created.	
Collection Added	Is raised whenever a collection is added. Only Case level fields are available to be assigned to the Collection Added event type.	
Collection Removed	Is raised whenever a collection member is removed. Only Case level fields are available to be assigned to the Collection Removed event type.	
Custom Event	Is raised at a time determined by a custom event code. While this event type is available as standard functionality, the required event code is custom to each institution. If interested in using this functionality, please contact a Temenos Account Manager.	
Field Changed	Is raised whenever a field changes. Only Case level fields are available to be assigned to the Field Changed event type.	

While most events are straightforward, events such as Collection Added, Collection Removed, and Field Changed require additional input.

- Collection Added or Collection Removed

A Collection is a group of like entities such as Cases.

> Only Case level fields are available to be assigned to the Collection Added or Collection Removed event type.

When the Collection Added or Collection Removed event is selected, the Select Collections window appears to assign the desired collection(s) to the event. This window displays a list of all collections that are available in Temenos Infinity's Collection module.

> Multiple collection types may be added to an event; however, the event name is only displayed as Collection Added or Collection Removed in the Events tab. It is recommended that the Name and/or Description entered for the pairing in the General tab identifies the collection(s) that are being used for the event.

Field Changed

When the Field Changed event is selected, the Select Fields window opened to assign the desired fields to the event. This window displays a list of all fields in Temenos Infinity's Collection module.

> Only Case level fields are available to be assigned to the Field Changed event type.

> Multiple fields may be added to an event; however, the Event is displayed as Field Changed. It is recommended that the pairing's Name and/or Description indicates the field(s) that are being used in this pairing.

> In the Audit History screen, Field Changed events do appear as auditable actions under the Add a New Application item, but this information does not reflect updates made per the triggering of an event/action pairing. While these events do occur as part of the application initialization process, the Field Changed events configured in Event Processing are only triggered **AFTER** an application is already created.

Actions

The Actions tab provides administrators with the ability to assign the action(s) to occur as a result of the defined event(s). When an event occurs, the action assigned within tab automatically fires or is queued until the configured time-delay expires.

A toolbar appears at the top of the tab to enable administrators to perform the following actions:

> The following buttons are disabled within the Actions tab for system-defined event/action pairs.

Button	Description

Add	Enables the ability to add an action to the Event Processing pair. When clicked, a window appears to allow administrators to select the Action Type to be added.
Edit	Enables the ability to edit an action assigned to the Event Processing pair. This button is only enabled for those actions that require additional information, such as Execute Rules and Execute Code. Please see the Edit Actions section in this topic for more information on the action types that can be modified.
Delete	Enables the ability to remove an action from the Event Processing pair.

When an action type is added, the name of the action populates within the grid.

More than one action may be added to an event/action pair. If action priority is a concern, it is recommended to pair multiple actions to an event as opposed to creating two separate event pairings. When more than one action is added, the pairing is treated as an "And Statement," and are triggered simultaneously. If an event occurs, all actions trigger. If multiple events and multiple actions are paired, all actions trigger when one event occurs. If actions are not contained in the same Event pair, the actions may not fire in the intended order. Pairing Actions within one Event ensures that priority is handled as intended, as long as Actions are ordered properly within the Event.

Reference the table below for an overview of the system-defined action types available in the Collection module:

Additional actions may be available within the Select Action Type window when certain third party connectors are active at the institution. For information on the events that are available for a connector, please see the applicable Connector Guide.

Actions	Description
Execute Code	Execute system-defined or custom code to perform certain actions. This can also be used to inform third parties about changes to the case.
Execute Rules	Executes the configured rules that are assigned to the action.

While most actions are straightforward, actions such as Execute Code and Execute Rules require additional input.

Execute Code

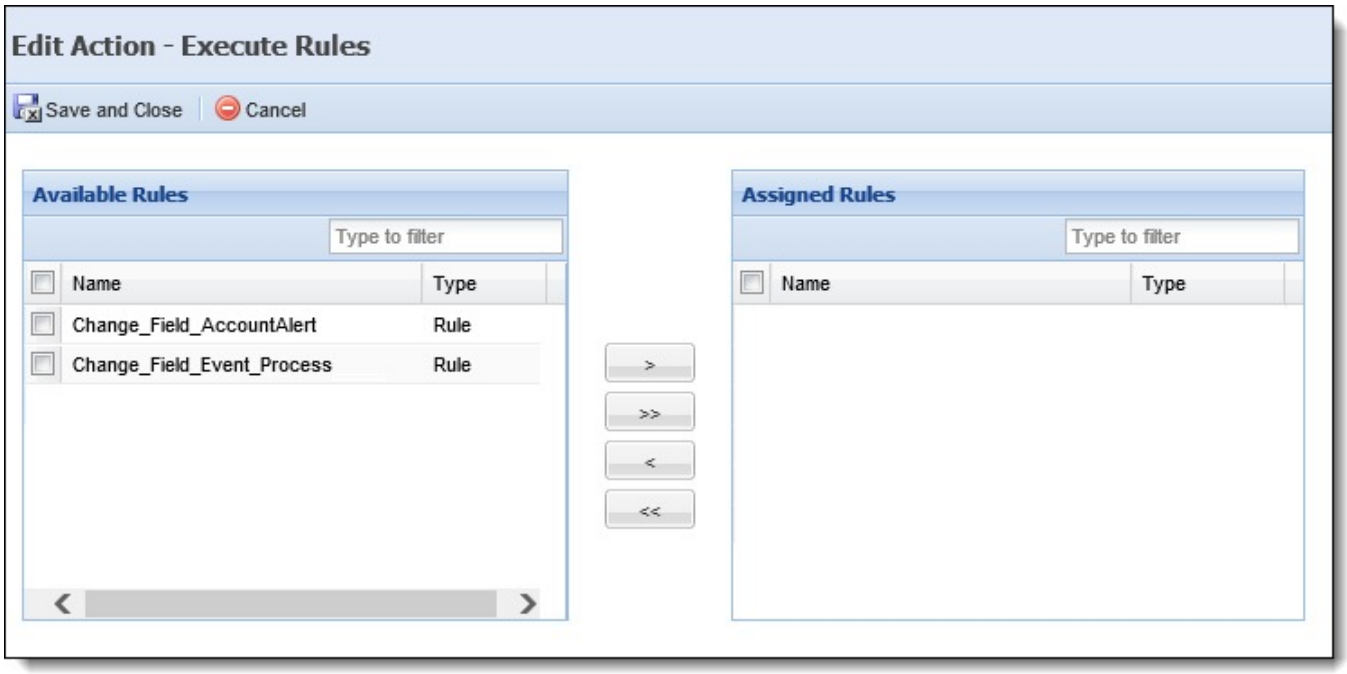
The Execute Code action is for development purposes only.

When the Execute Code action type is selected, the Edit Action – Execute Code window appears to enter the class name and assembly path required to assign the custom code to execute for the action.

Execute Rules

When the Execute Rules action type is selected, the Edit Action – Execute Rules window appears to assign the Event Processing rules that execute for the action.

> Only rules written in the Event Processing category in Rules Management are able to be assigned to the Execute Rules action type.



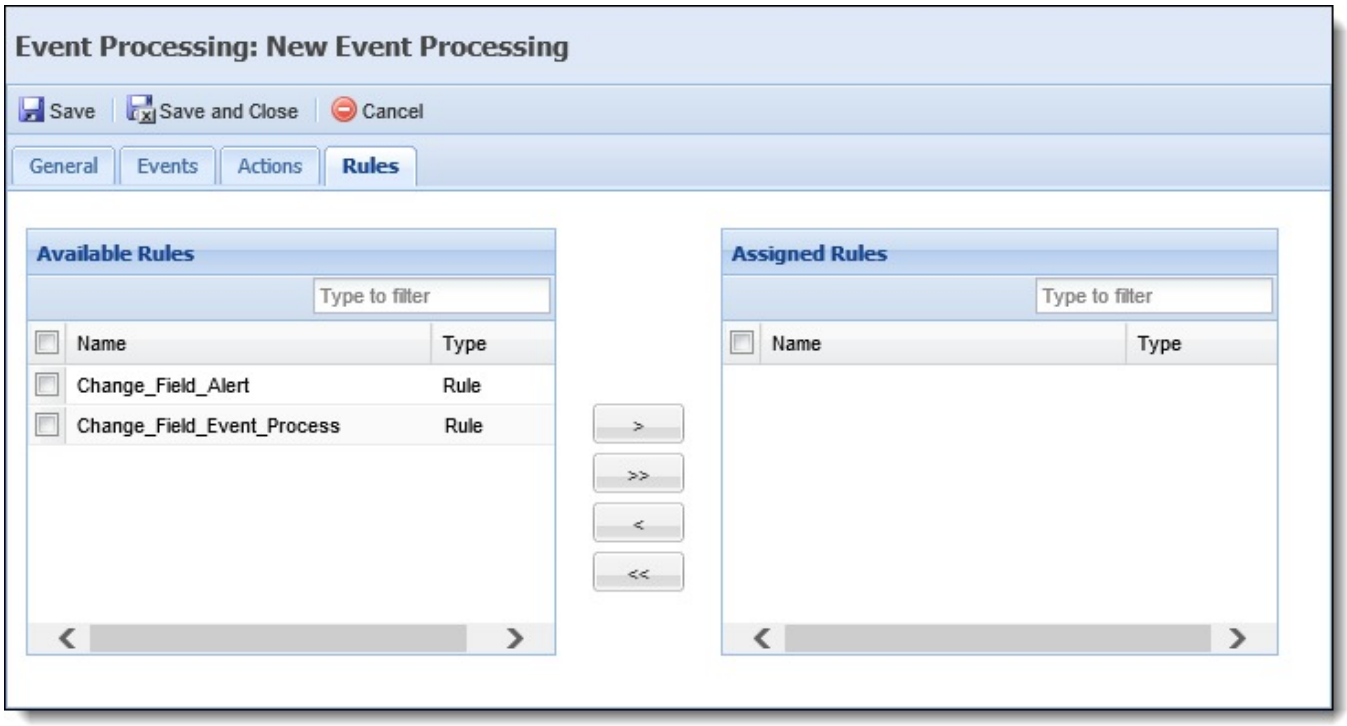
Get Collateral Data from Core

When the Get Collateral Data from Core action type is selected, the Edit Action – Get Collateral Data from Core window appears to assign the Event Processing rules that execute for the action.

> Only rules written in the Event Processing category in Rules Management are able to be assigned to the Execute Rules action type.

Rules

The Rules tab allows the administrator to set qualifiers for the Event Processing pair. Rules can be assigned to each event/ action pair to add clarification and control over the application of actions. These rules can be created under the “Event Processing” category in Rules Management to indicate if the action(s) should be executed.



This tab includes the following attributes to assign Events Processing rules to an event/action pair:

> The arrows are disabled within the Rules tab for system-defined event/action pairs.

Attribute	Description
Available	Displays a list of all Event Processing rules configured in System Management > Collection > Rules Management. Assign rules by selecting the desired rule(s) from the list and moving them to the Assigned box. The EventProcessing rules may employ a "Stop Event Processing" template which prevents an event/action pair from executing.
Assigned	Displays a list of all the rules that have been assigned to the event pair. Once the event fires, the assigned rules are executed.

Creating an Event/Action Pair

The Create function allows administrators to define and structure a new event/action pair.

To create a new pairing:

- Navigate to System Management >Collection > Event Processing and click Create.
- Within the Event Processing edit screen, define the General attributes, including any desired time delay configurations.
- After defining all General attributes, navigate to the Events tab and perform one of the following actions:

  ▶ Add Events

  To add an event:

  - Click Add within the Events tab.

- The Select Event Type window appears. Click the to display the available Event Types, and select the desired event from the drop-down list.

  For an overview of each system-defined event type, please see the Events section in this topic.

- Once the desired event has been selected, click OK to close the Select Event Type window and assign the event to the Event Processing pair.
- If the event requires additional configuration, a window appears upon clicking OK to present the options available to assign to the event. For example, the Collection Added event requires a Collection to be identified; therefore, a Select Collection window appears when the event is added to allow a field collection to be assigned to the event. Once the desired option is assigned to the event, click Done within the Select window to return to the Events tab.

  For more information on the events that require additional configurations, please see the Events section in this topic.

- Upon clicking OK, or Done, the event is added to the grid within the Events tab.

Edit Events

The Edit button is only enabled for those events that require additional information, such as:

- Collection Added
- Collection Removed
- Custom Event
- Field Changed

To modify an event that allows editing:

- Double-click the desired event within the Events tab or highlight the event and click Edit.
- Within the window that appears, make the necessary modifications.
- Click to close the window and return to the Events tab.

Delete Events

To delete an event:

- Highlight the desired event within the Events tab and click Delete.
- The event is removed from the Events tab.

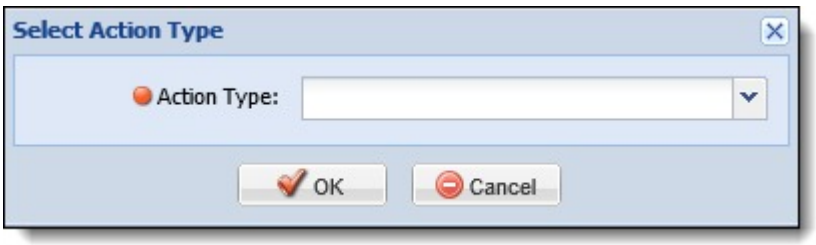
- Once all events have been added, select the Actions tab and perform one of the following actions:

Add Actions

To add an action:

- Click Add within the Actions tab.
- The Select Action Type window appears. Click the to display the available Action Types, and select the desired action from the drop-down list.

> For an overview of each system-defined action type, please see the Actions section in this topic.



- Once the desired action has been selected, click OK to close the Select Action Type window and assign the action to the Event Processing pair.
- Similar to events, if the action requires additional configuration, a window appears upon clicking to present the options available to assign to the action. For example, when the Execute Rules action is added, a window appears to assign one or more Event Processing rules to execute when the action fires in an application. Once the desired option is assigned to the event, click within the Select window to return to the Actions tab.

> For more information on the actions that require additional configurations, please see the Actions section in this topic.

- Upon clicking OK, or , the action is added to the grid within the Actions tab.

> If more than one action is added, the order the actions are executed can be rearranged by clicking the action and dragging it to the desired location in the grid.

Edit Actions

> The Edit button is only enabled for those actions that require additional information, such as:
>
> - Execute Code
> - Execute Rules

To modify an action that allows editing:

- Double-click the desired action within the Actions tab or highlight the action and click Edit.
- Within the window that appears, make the necessary modifications.
- Click Done to close the window and return to the Actions tab.

Delete Actions

To delete an action:

- Highlight the desired action within the Actions tab and click Delete.

- The action is removed from the Actions tab.

- If desired, select the Rules tab and assign any additional rules to execute for the event/action pair. For example, rules authored to stop actions from executing.
- Upon completion of all attributes, click Save and Close to create the event/action pair. The pairing is added to the grid in the Event Processing tab.

Editing an Event/Action Pair

The Edit function enables administrators to modify an existing event/action pair.

> When editing an event/action pair that is set on a time delay, any modifications made to the General, Events, and Rules tabs are applied to future executions of the pair. Modifications made to the Actions tab effect both queued actions and future executions of the pair. For more information, please see the Time Delay Process section in this topic.

To edit an event pair:

- Double-click the desired event/action pair within the grid, or highlight the pair and click Edit.
- Navigate through the tabs in the Event Processing edit screen and make any necessary changes to the attributes.
- Once the changes have been made, click Save and Close to retain the updated settings and return to the Event Processing page.

Deleting an Event/Action Pair

The Delete function enables administrators to remove custom event/action pairs from Temenos Infinity.

> System-defined event/action pairs cannot be deleted; therefore, the Delete button is disabled within the Event Processing tab when a system-defined pair is selected in the grid.

- To delete an event/action pair, highlight the desired pair within the Event Processing grid and click Delete.
- A message appears to confirm that the pair should be deleted.

  > If the event/action pair has been set on a time delay, a message appears to inform that the pair is configured for delayed actions, and confirm that the pair should be deleted from Event Processing.
  >
  > > If Yes is selected, any queued actions for the pair are also deleted. For more information on queued actions, please see the Time Delay Process section in this topic.

- Click **Yes** to delete the event pair or **No** to retain the event/action pair and return to the Event Processing tab.

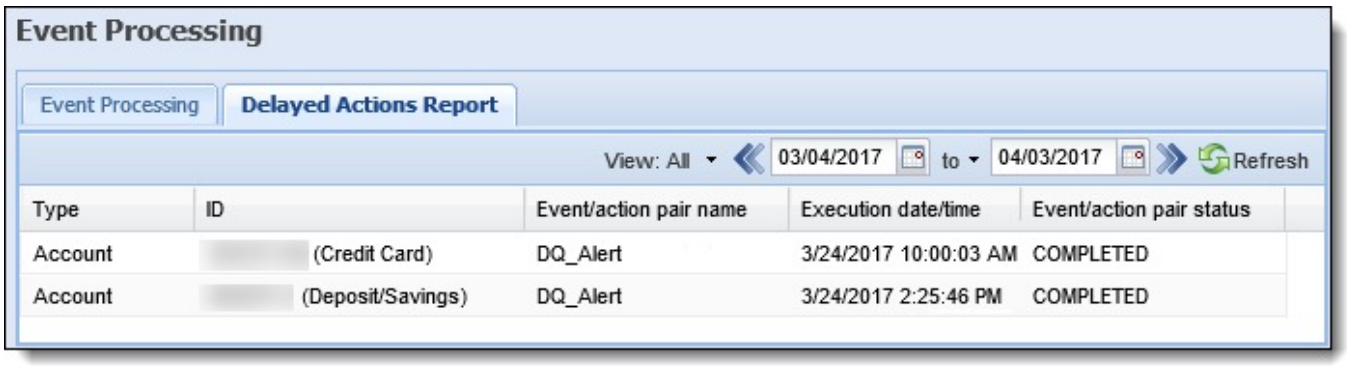
Delayed Actions Report

The Delayed Actions Report tab provides a detailed overview of each delayed event/action pair that has executed in Temenos Infinity.

> Please see the Time Delay Process section in this topic for a complete overview of this functionality.

This tab displays a read-only grid that can be used to view information about each delayed pairing, such as the status and the execution date and time.

> When more than one event is configured for a pairing, and the events are not triggered simultaneously, a record for each instance of the event process is added to the Delayed Actions Report. When the events occur simultaneously, the items are de-duped and only one record of the event process appears in the Delayed Actions grid. For example, if the Application Approved and Field Changed (Application.StatusId) events are assigned to a delayed pairing, only one record is added to the Delayed Actions grid since the events occur at the same time during the application process.



Within this tab, administrators can quickly and easily access the following information for each delayed event/action pair executed:

Column	Description
Type	Displays the object type on which the event process was run, such as Account, Case, or Person.
ID	Displays the ID of the object on which the event process was run, such as the Account Number. Reference the table below for an overview of the value that is displayed for each object type: **Object Type** / **ID Displayed** Account: Displays the Account Number, Suffix, and Account Type in the following format: <Account NUmber> - <Suffix> (<Account Type>). Case: Displays the Case Number and Case Title in the following format: <Case Number>(<Case Title>). Person: Displays the TIN of the person.
Event/action pair name	Displays the name of the event/action pair.
Execution date/time	Displays the date and time that the delayed action is set to execute.

Event/action pair status	Displays the status of the event/action pair. One of the following values populates within this column to identify the status of the delayed actions: **Status** — **Description** Pending — Identifies that the time delay for the event/action pair has not yet expired. The actions assigned to the pair have not executed and remain in the queue. Completed — Identifies that the time delay for the event/action pair has expired and all actions assigned to the pair have successfully executed. Failed — Identifies that a failure occurred while processing the event/action pair and the event process was unable to complete successfully.

By default, the Delayed Actions Report displays information for all delayed event/action pairs that have executed over the past 30 days; however, the toolbar in the top of the tab provides the following options to filter the data that appears within the grid:

Filter Option	Description
View: All	Enables the ability to filter by Event/Action Pair Status. By default, the View drop-down is set to All to display information for all event/action pairs regardless of status. To filter by status, click the drop-down arrow and select one of the following statuses: • Pending • Completed • Failed

02/26/2017 to 03/28/2017	Enables the ability to display information for a specific time period. By default, this tab displays status information for a time period of 30 days from the current date. To modify the date range, perform one of the following actions: • Manually enter the desired dates into each box. • Click the next to each box to select the desired date. • Select a pre-configured date range from the To drop-down list. The filter end date defaults to the current date; therefore, it may be necessary to adjust the end date to display execution times that are set in the future.
Refresh	Enables the ability to refresh the information that appears in the screen. The grid within the Delayed Actions Report tab does not automatically refresh. If an action executes while the tab is open, the status for the pairing is not updated until a refresh is performed.

Time Delay Process

The time delay functionality provides administrators with the ability to post-pone the execution of actions for an event process by determining the number of days, hours, minutes, or seconds that must pass before the actions assigned to the event/action pair are executed.

For example, when a vehicle is repossessed, the owner has a specific number of days to reclaim the vehicle. This functionality can be used to move the account to the Ready for Auction Queue 15 days after the value of the Date Repossessed field is modified.

Executing a Delayed Event/Action Pair

When an event for a delayed pairing occurs, the assigned actions are queued in the database until the delay settings configured within the General tab expire.

To learn more about the Delay Settings for a pairing, please see the General section under Event Processing in this topic.

Upon execution of the event, a record of the pairing is added to the Delayed Actions Report tab with a status of Pending. When the delay settings for the pairing expire, the actions are executed. If all actions execute successfully, the status of the pairing is updated to Completed.

If one or more of the actions assigned to a delayed event/action pair fail, the status for the pair is set to Failed. For assistance identifying the specific action that failed to execute, please contact a Temenos Customer Care or Professional Services Representative.

Events Queue Clean-up Process

The EVENTS_QUEUE_CLEANUP process allows institutions to determine the number of months that history for each delayed event/action pair is maintained in the database. When active, this process runs each night to review the records in the database for each event/action pair, and remove any records that exceed the number of months set for the EVENTS_QUEUE_DURATION parameter.

> The EVENTS_QUEUE_CLEANUP process is not automatically activated for each institution. If this process is not enabled, records for each delayed event/action pair remain in the database indefinitely. Please contact a Temenos Customer Care or Professional Services Representative for assistance with enabling the EVENTS_QUEUE_CLEANUP process.

By default, history for each delayed event/action pair is stored in the database for a time period of six months when the EVENTS_QUEUE_CLEANUP process is enabled; however, this value can be changed with the assistance of a Temenos Customer Care or Professional Services Representative.

Modifying a Delayed Event/Action Pair

When an event/action pair is set on a time delay, modifications made to certain attributes are applied to future executions of the pairing, but may also update any queued actions as well. Reference the table below for an overview of the behavior that occurs when specific attributes are updated for a delayed event/action pair:

Attribute	Effect on Behavior of Event/Action Pair
General	Modifications made to any of the General attributes only apply to future executions of the event/action pair. For example, it the duration of the time delay is updated from one day to two days, any queued actions are still performed after the one day expires, but all actions that are queued after the modification are not executed until two days have passed. If a delayed event/action pair is deactivated, all queued actions in a Pending status are still processed.
Events	Modifications made to the assigned events are only applied to future executions of the event/action pair.
Actions	Modifications made to the assigned actions are applied to future executions of the event/action pair, as well as all queued actions for the pairing that are in a Pending status. For example, if a rule is added to the Execute Rules action, all of the queued Execute Rule actions for the pairing are updated to execute the new rule when the action is performed.
Rules	Modifications made to any of the Rule attributes are only applied to future executions of the event/action pair.

LMS.Core.Process and SQL Service Broker

> This section is intended for an institution's IT department.

In order for the time delay functionality to occur in Temenos Infinity, the following services must be enabled for the financial institution:

LMS.Core.Process

The LMS.Core.Process windows service enables the ability to use the time delay functionality in Temenos Infinity by

listening for responses from the Service Broker queue, and, when a response comes in, calling the service that executes the delayed event/action pair. This windows service is automatically installed and enabled on the server for Temenos Infinity.

> The LMS.Core.Process windows service can be load-balanced across multiple servers; however, if it is desired to run the service on multiple servers, the LMS.Core.Process windows service must be manually installed on each additional server.

SQL Service Broker

Service Broker is a SQL-based messaging system that sends a response to the LMS.Core.Process windows service when a delayed event/action pair executes. This service is automatically enabled in the database for each institution; however, when a back-up and restore of the Temenos Infinity database is performed, SQL Service Broker is automatically disabled in the new location. To reactivate Service Broker on the SQL server for the institution, the following script must be run:

> The person running the following script must have ALTER permissions for the database.

```
IF (SELECT is_broker_enabled FROM sys.databases WHERE name = DB_NAME()) = 0
BEGIN
	DECLARE @BrokerGUID as UNIQUEIDENTIFIER = (SELECT service_broker_guid FROM sys.databases
WHERE name = DB_NAME())
	DECLARE @DBName NVARCHAR(50)  = DB_NAME()
	DECLARE @SetSingle NVARCHAR(100) = 'ALTER DATABASE [' + @DBName + '] SET SINGLE_USER WITH
ROLLBACK IMMEDIATE;'
	DECLARE @SetMulti NVARCHAR(100) = 'ALTER DATABASE [' + @DBName + '] SET MULTI_USER;'
	DECLARE @BrokerSQL NVARCHAR(200)
	SET @BrokerSQL = 'ALTER DATABASE [' + @DBName + ']'
	IF (SELECT COUNT(service_broker_guid) FROM sys.databases WHERE service_broker_guid =
@BrokerGUID) > 1
		BEGIN
			--if db is a back up and restore the broker guid could match the original so
we need to create a new broker
			SELECT @BrokerSQL = @BrokerSQL +' SET NEW_BROKER'
		END
	ELSE
		BEGIN
			SELECT @BrokerSQL = @BrokerSQL +' SET ENABLE_BROKER'
		END
	--broker needs exclusive locks to create without setting to single could cause the broker
creation to han
	EXEC sp_executesql @SetSingle
	EXEC sp_executesql @BrokerSQL
	EXEC sp_executesql @SetMulti
END
```

Charge Off Events

Within System Management, administrators have the ability to author Event Processing rules that automatically set the value of Recovery GL Account and Metro 2 Credit Reporting fields during and after the charge off process. For example, rules may be authored which automatically assess whether an account is eligible for credit reporting and subsequently set the IsEligibleForCreditReporting field to true or false at the time that an account is charged off.

The Charge Off Events topic provides an overview of the configurations required to automatically set the value of Recovery GL Account and Metro 2 Credit Reporting fields during and after the charge off process.

Rule Configuration

> For a complete overview of the rule configuration process, please see the Rule Authoring Topic within the Administrator Guide.

To begin authoring this type of rule, navigate to System Management > Collections > **Rules Management** and click Edit Rules to open Rules Manager. Create a new rule using the EventProcessing category. Click Create and select Business Rule. Within the pop-up window, select the Account or Account.Persons Entity.

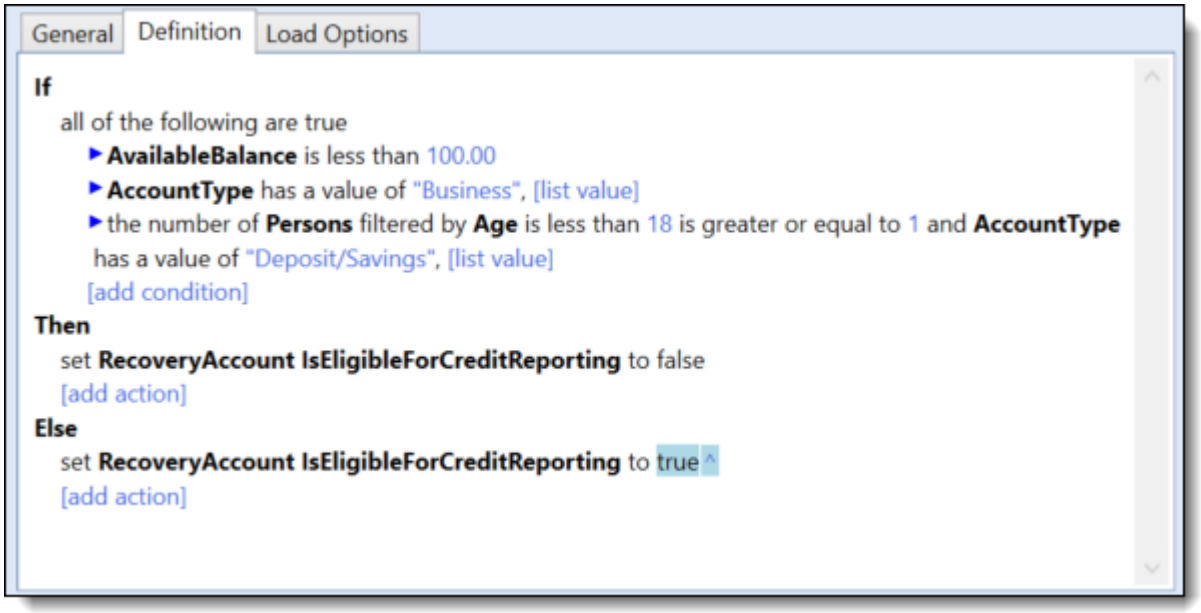
> There are many ways to author a rule; the rules provided below are to be used for example ONLY.

Within the **If Statement**, define the conditions which must be met in order for a field to be set at the time of charge off. For example:

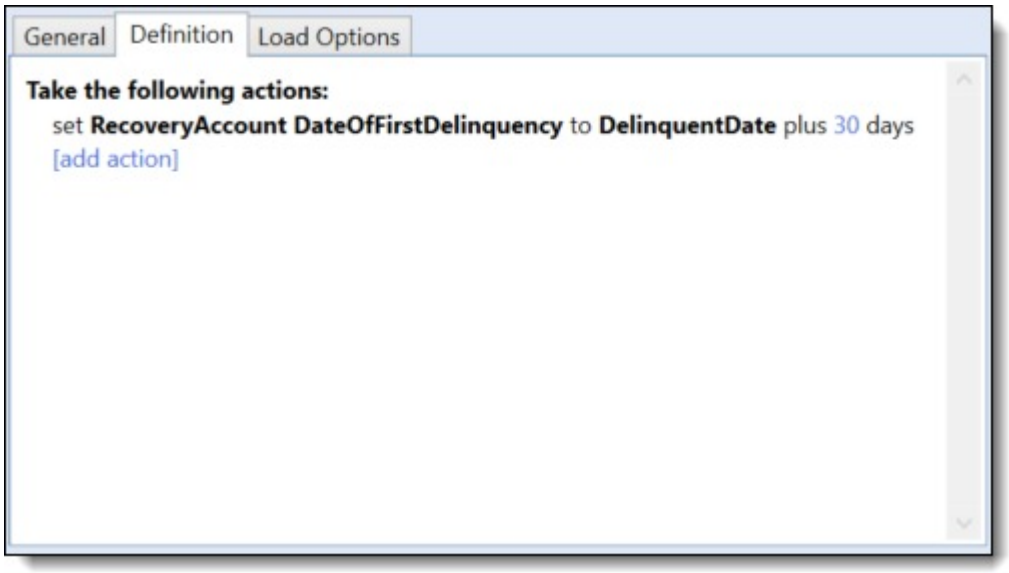
- AccountType
- AccountBalance

When authoring the **Then Statement**, select the "set the value of a field" action template. Upon selecting this template, the following vocabulary populates: "set **[field]** to **[value]**."

The example below provides a demonstration of a rule that assesses whether an account that has been charged off is eligible for credit reporting based on the account's available balance and account type:



The following is another example of a rule that sets the Date of First Delinquency when an account is charged off:



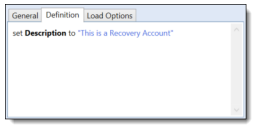
Create Event/Action Pair

Once a rule has been authored, Pre Charge Off and Post Charge Off events can be created by navigating to System Management > Collection > **Event Processing** and clicking Create.

Within the Events tab, select the Pre Charge Off or Post Charge Off event type. Within the Actions tab, select the Execute Rules action and assign the rule authored to set the value of Metro 2 credit reporting fields or Recovery GL account fields at the time of charge off.

Reference the table below for an example of the required configurations for a Post Charge Off Event, which assesses whether an account that has been charged off is eligible for credit reporting:

Configuration	Where Configured	Description

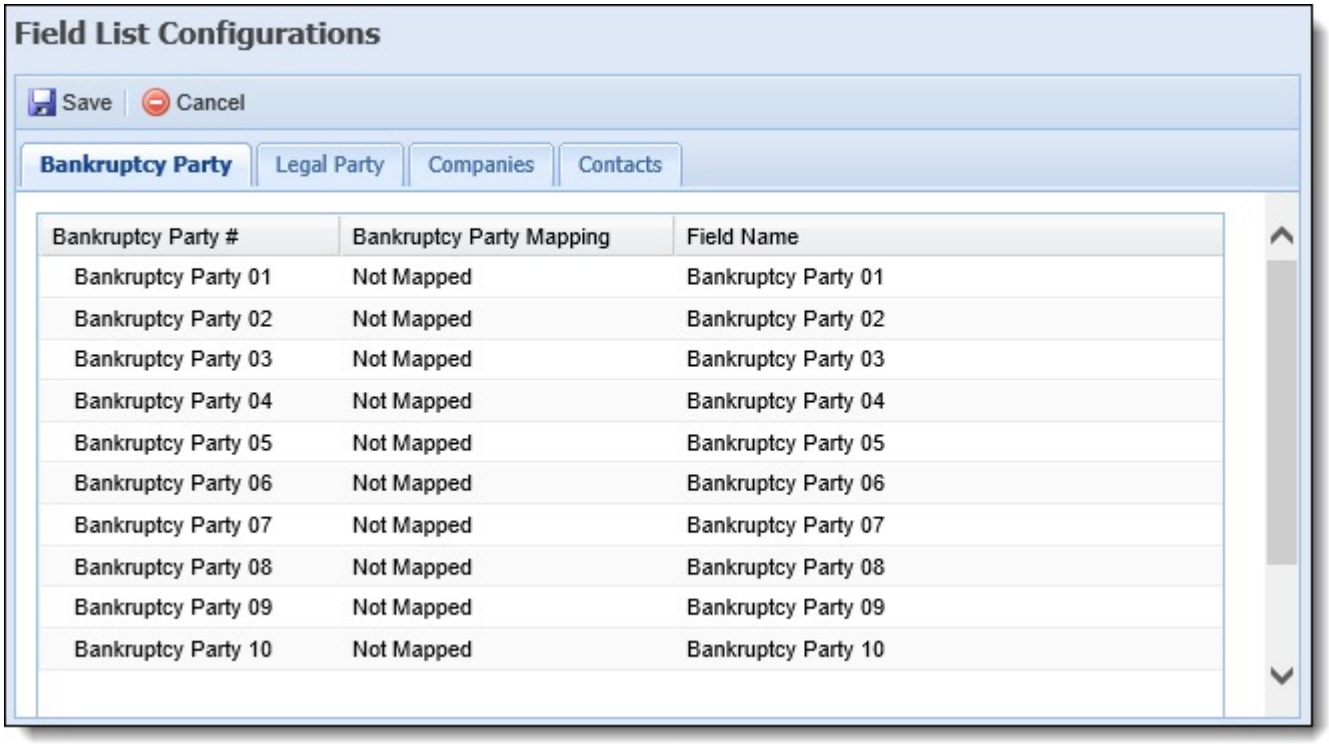
Author Event Processing Rule: • Entity - Account • Template - If/Then/Else, Set the Value of a Field	System Management > Collection > Rules Management	When this rule executes, the value of a designated field is set according to the rule configuration. For example, rules can be authored that execute when the Pre Charge Off Event is triggered to set an Account field on the Recovery Account, such as Description, to populate with a unique account description. The following is an example rule configuration to set the Description field on a Recovery Account: 
Configure Event/Action Pair: • Event - Post Charge Off • Action - Execute Rules ○ Assign the Event Processing rule configured to set the value of Metro 2 Credit Reporting fields.	System Management > Collection > Event Processing	This event/action pair executes when the charge off process is complete. When the charge off process completes, and the account in context is moved from the Collection module to the Recovery module, the rule assigned to the Execute Rules action fires to automatically set the value of Metro 2 Credit Reporting fields for the Recovery account in context.

For more information on Event Processing, please see the Event Processing topic within the Administrator Guide.

Field List Configurations

The Field List Configurations page (System Management > Field List Configurations) allows system administrators to map values from lookups in Field Configurations to flattened fields in the Field List for Temenos functionality, such as letters, reports, and views.

This page includes a separate tab for each lookup that allows values to be mapped to flattened fields.



Available Field List Configurations

From the Field List Configurations page, system administrators are able to map values within the following tabs:

- Bankruptcy Party
- Legal Party
- Companies
- Contacts

Each tab includes a grid with the following columns:

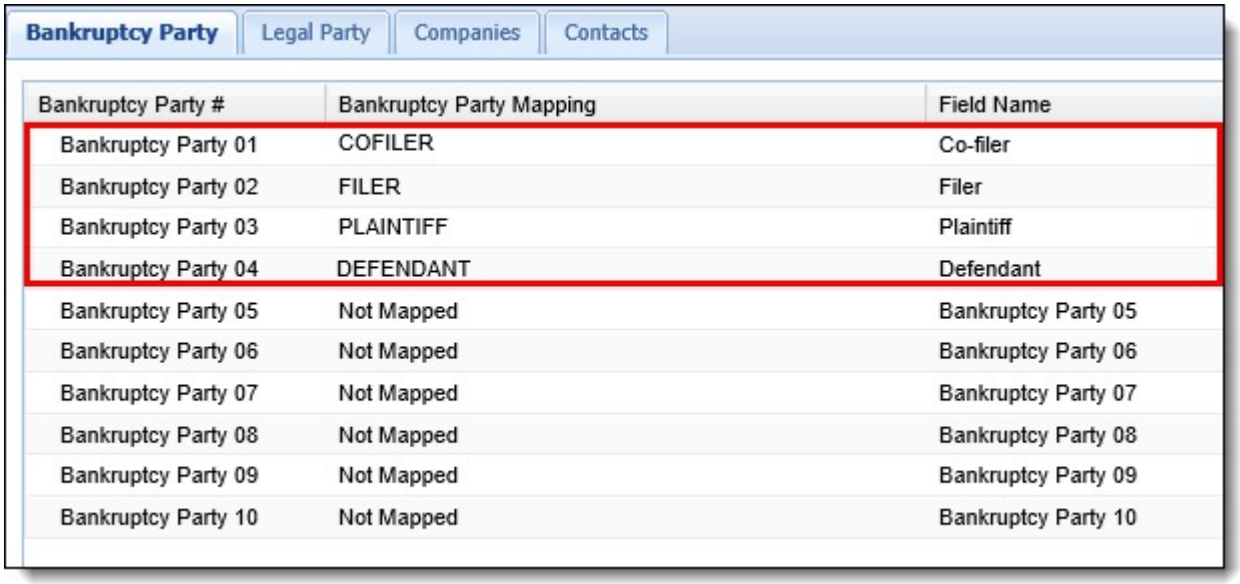
Column	Description

#	A read-only column that displays the Bankruptcy Party, Legal Party, Company, or Contact fields available to map to specific values in Temenos Infinity. This column displays a row for the following number of fields in each tab: • Bankruptcy Party: Bankruptcy Party 01 - Bankruptcy Party 10 • Legal Party: Legal Party 01 - Legal Party 10 • Companies: Company 01 - Company 20 • Contacts: Contact 01 - Contact 20
Mapping	An editable column that provides the ability to select the lookup value to map as the applicable type, or relationship, in the Field List. • In the Bankruptcy Party tab, the drop-down list includes the values configured for the BANKRUPTCY_PARTY_TYPE lookup in Field Configurations. • In the Legal Party tab, the drop-down list includes the values configured for the LEGAL_PARTY_TYPE lookup in Field Configurations. • In the Companies tab, the drop-down list includes the values configured for the COMPANY_TYPE lookup in Field Configurations. • In the Contacts tab, the drop-down list includes the values configured for the CONTACT_RELATIONSHIP lookup in Field Configurations.
Field Name	A read-only column that displays the value selected for the applicable mapping. This column identifies the name of the field as it appears in the Field List.

Bankruptcy Party

The Bankruptcy Party tab allows administrators to map values from the BANKRUPTCY_PARTY_TYPE lookup to up to ten flattened Bankruptcy Party fields. These mappings are then available in the Parties folder that appears under Bankruptcy in the Field List when adding Case fields to a letter, or building a Case type report or view. System administrators can use these fields to populate data specific to each Bankruptcy Party on a case in a letter, report, or view, such as Attorney Information and Party Demographics.

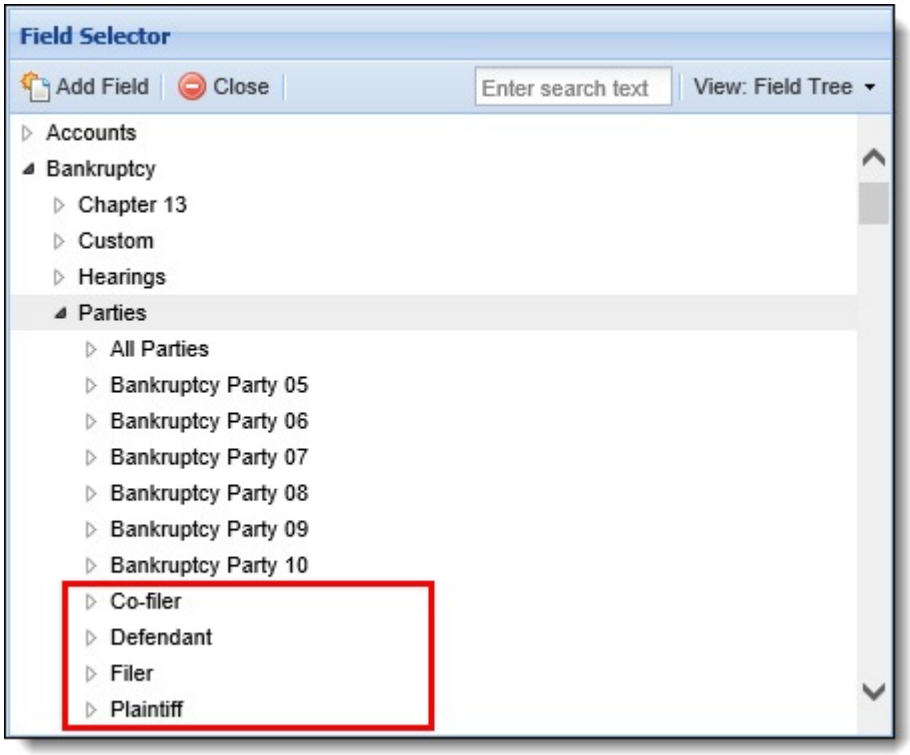
In the following example, four Bankruptcy Parties have been mapped in Field List Configurations:



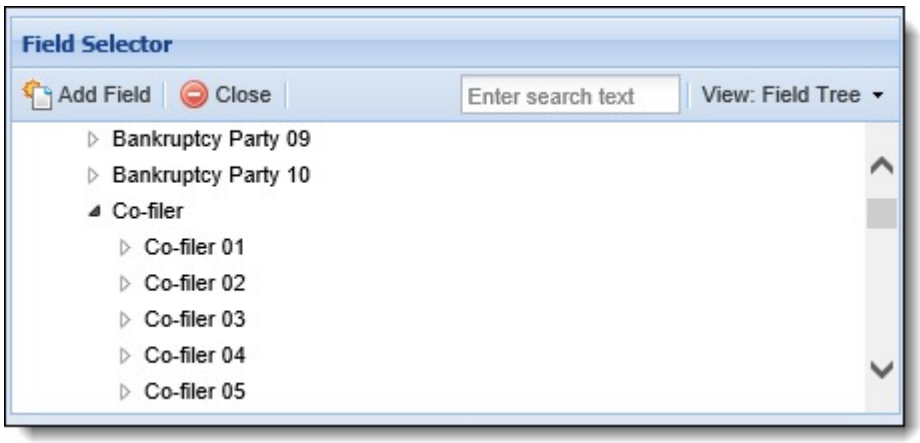
Bankruptcy Party | Legal Party | Companies | Contacts

Bankruptcy Party #	Bankruptcy Party Mapping	Field Name
Bankruptcy Party 01	COFILER	Co-filer
Bankruptcy Party 02	FILER	Filer
Bankruptcy Party 03	PLAINTIFF	Plaintiff
Bankruptcy Party 04	DEFENDANT	Defendant
Bankruptcy Party 05	Not Mapped	Bankruptcy Party 05
Bankruptcy Party 06	Not Mapped	Bankruptcy Party 06
Bankruptcy Party 07	Not Mapped	Bankruptcy Party 07
Bankruptcy Party 08	Not Mapped	Bankruptcy Party 08
Bankruptcy Party 09	Not Mapped	Bankruptcy Party 09
Bankruptcy Party 10	Not Mapped	Bankruptcy Party 10

Once the Field List Configurations are saved, the mappings populate in the Field List, as shown in the below image for a Case report:

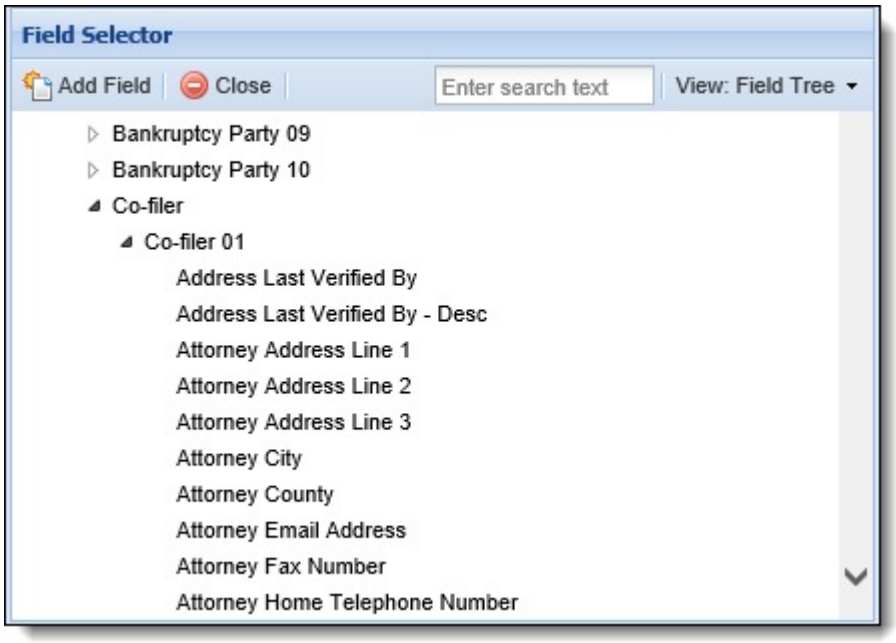


Under each Party type configured in Field List Configurations, administrators can map data specific to five Bankruptcy Parties on the case:



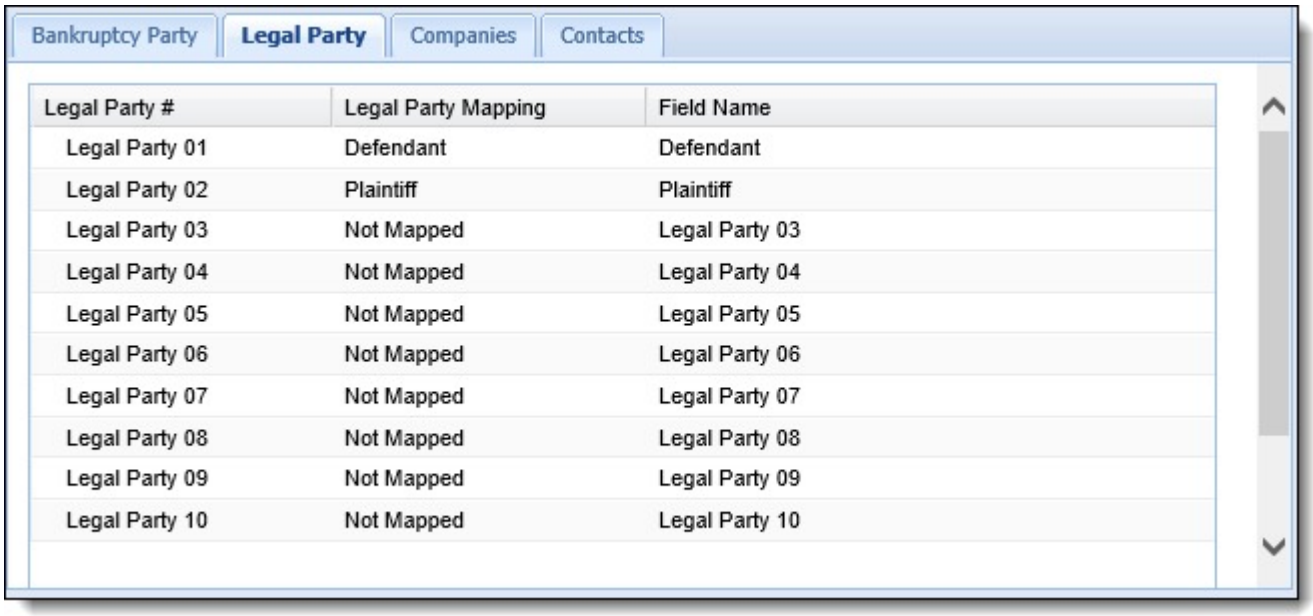
The folder for each party contains fields that populate data specific to the Bankruptcy Party when the fields generate in a report, view, or letter. In the below example, data populates for the person listed as the first Co-filer on the case.

> If a Party Type is not set in the Bankruptcy Party screen, any fields for the party populate a blank value when generated in a letter, report, or view.



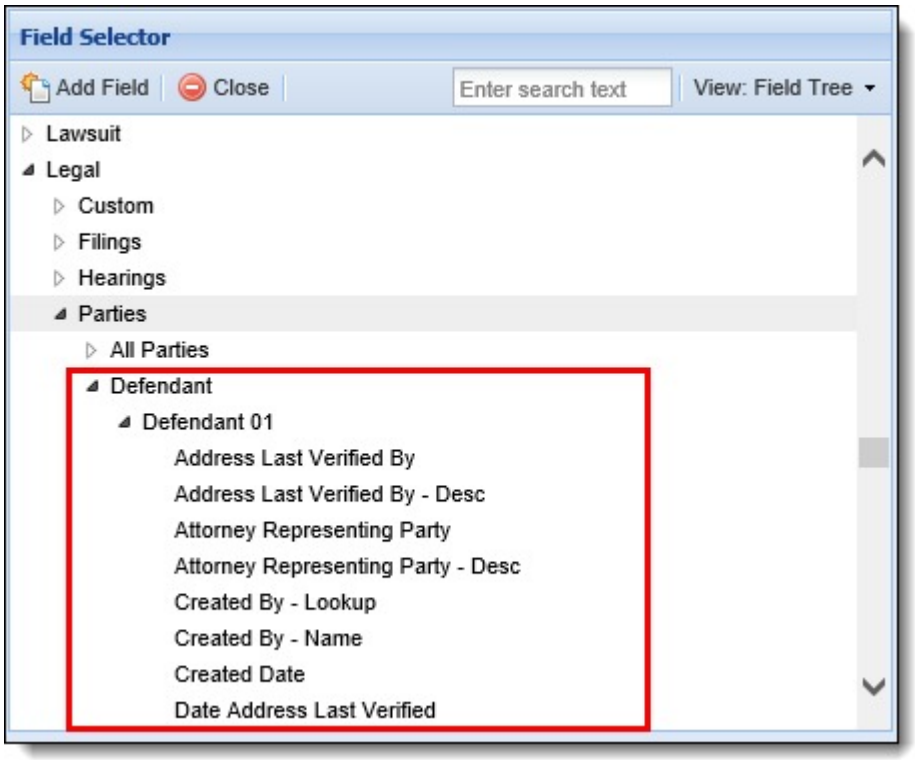
Legal Party

The Legal Party tab allows administrators to map values from the LEGAL_PARTY_TYPE lookup to up to ten flattened Legal Party fields. These mappings are then available in the Parties folder that appears under Legal in the Field List when adding Case fields to a letter, or building a Case type report or view. System administrators can use these fields to populate data specific to each Legal Party on a case, such as Attorney Information and Party Demographics.



Legal Party #	Legal Party Mapping	Field Name
Legal Party 01	Defendant	Defendant
Legal Party 02	Plaintiff	Plaintiff
Legal Party 03	Not Mapped	Legal Party 03
Legal Party 04	Not Mapped	Legal Party 04
Legal Party 05	Not Mapped	Legal Party 05
Legal Party 06	Not Mapped	Legal Party 06
Legal Party 07	Not Mapped	Legal Party 07
Legal Party 08	Not Mapped	Legal Party 08
Legal Party 09	Not Mapped	Legal Party 09
Legal Party 10	Not Mapped	Legal Party 10

Similar to the Bankruptcy Party tab, once the Field List Configurations are saved in the Legal Party tab, the mappings populate in the Field List to enable the ability to generate data specific to the Legal Party in a report, view, or letter.



If a Party Type is not set in the Legal Party screen, any fields for the party populate a blank value when generated in a letter, report, or view.

Companies

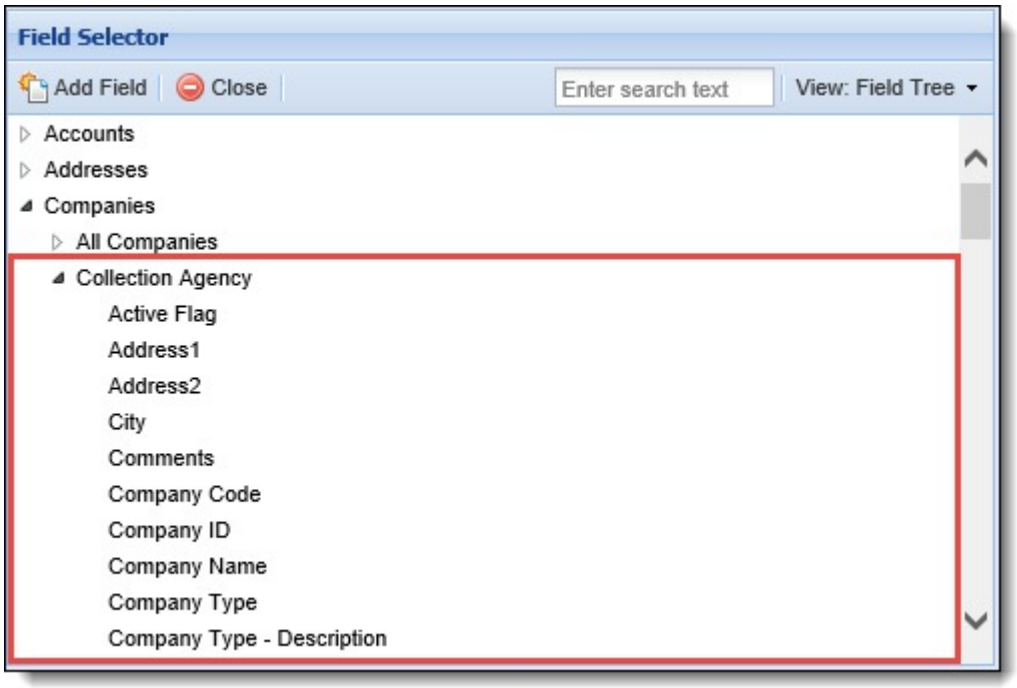
The Companies tab allows administrators to map values from the COMPANY_TYPE lookup to up to twenty flattened Company fields. These mappings are then available in the Companies folder in the Field List when adding Account, Case or Person fields to a letter, email, report, or view. System administrators can use these fields to populate data specific to each company, such as the company name and demographics.

Bankruptcy Party | Legal Party | **Companies** | Contacts

Company #	Company Mapping	Field Name
Company 01	COLLECTION	Collection Agency
Company 02	EASTERN	Eastern
Company 03	Not Mapped	Company 03
Company 04	Not Mapped	Company 04
Company 05	Not Mapped	Company 05
Company 06	Not Mapped	Company 06
Company 07	Not Mapped	Company 07
Company 08	Not Mapped	Company 08
Company 09	Not Mapped	Company 09
Company 10	Not Mapped	Company 10
Company 11	Not Mapped	Company 11
Company 12	Not Mapped	Company 12
Company 13	Not Mapped	Company 13
Company 14	Not Mapped	Company 14
Company 15	Not Mapped	Company 15
Company 16	Not Mapped	Company 16
Company 17	Not Mapped	Company 17
Company 18	Not Mapped	Company 18
Company 19	Not Mapped	Company 19
Company 20	Not Mapped	Company 20

Once the Field List Configurations are saved in the Companies tab, the mappings populate in the Field List to enable the ability to generate data specific to the company in a report, view, letter, or email.

> The Field List for reports and views includes an All Companies folder, as shown in the below example. These fields provide the ability to display information for all active companies within the report or view when generated. This folder does not appear in the Field List for letter and email templates.



Contacts

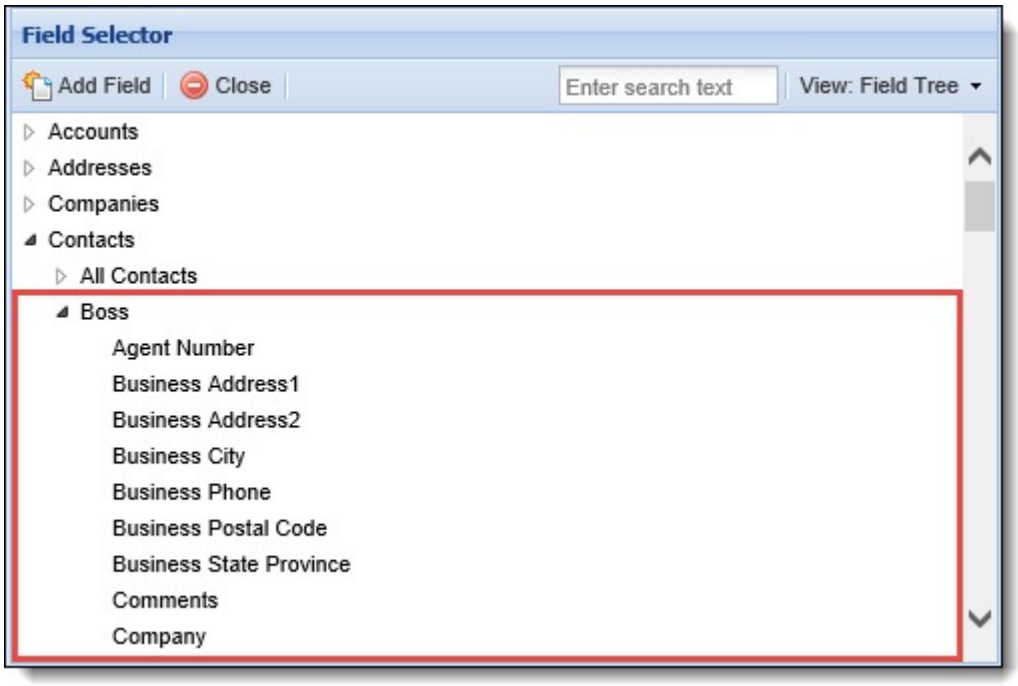
The Contacts tab allows administrators to map values from the CONTACT_RELATIONSHIP lookup to up to twenty flattened Contact fields. These mappings are then available in the Contacts folder in the Field List when adding Account, Case or Person fields to a letter, email, report, or view. System administrators can use these fields to populate data specific to each contact, such as the contact name, associated company, and home/business demographics.

Bankruptcy Party | Legal Party | Companies | **Contacts**

Contact #	Contact Mapping	Field Name
Contact 01	LANDLORD	Landlord
Contact 02	BOSS	Boss
Contact 03	Not Mapped	Contact 03
Contact 04	Not Mapped	Contact 04
Contact 05	Not Mapped	Contact 05
Contact 06	Not Mapped	Contact 06
Contact 07	Not Mapped	Contact 07
Contact 08	Not Mapped	Contact 08
Contact 09	Not Mapped	Contact 09
Contact 10	Not Mapped	Contact 10
Contact 11	Not Mapped	Contact 11
Contact 12	Not Mapped	Contact 12
Contact 13	Not Mapped	Contact 13
Contact 14	Not Mapped	Contact 14
Contact 15	Not Mapped	Contact 15
Contact 16	Not Mapped	Contact 16
Contact 17	Not Mapped	Contact 17
Contact 18	Not Mapped	Contact 18
Contact 19	Not Mapped	Contact 19
Contact 20	Not Mapped	Contact 20

Once the Field List Configurations are saved in the Companies tab, the mappings populate in the Field List to enable the ability to generate data specific to the contact in a report, view, letter, or email.

> The Field List for reports and views includes an All Contacts folder, as shown in the below example. These fields provide the ability to display information for all active contacts within the report or view when generated. This folder does not appear in the Field List for letter and email templates.



Defining Field List Configurations

The Field List Configurations page provides system administrators with the ability to define mapping values directly within the grid in each tab.

> Each field must be mapped to a different value; therefore, an error is received upon clicking Save if the same value is selected within the Mapping column for more than one Bankruptcy Party, Legal Party, Company, or Contact field.

To map values in Field List Configurations:

- Select the desired tab in the Field List Configurations page.
- Within the grid, locate the desired field #, and click within the Mapping column for that row.
- From the drop-down list, select the value to be mapped to the corresponding field in the Field List.
- Repeat the above steps for each of the desired fields in the tab.
- Click Save to retain the mappings.
- If desired, navigate to another tab in the Field List Configurations page, and repeat the above steps until all mappings are complete.

Account and Role Types

Account Types

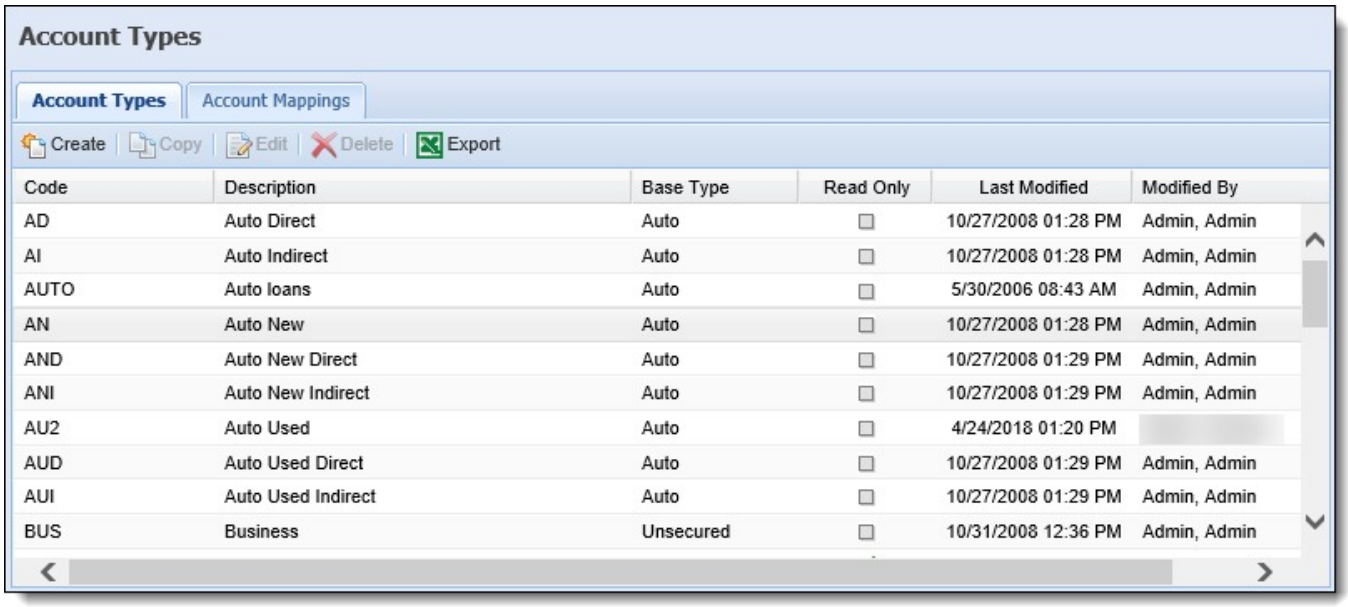
Temenos Infinity allows for the creation of account types to suit business needs while supporting standard account types for interface usage. Account types are a way to group/categorize specific accounts to allow for easier reporting, queuing, etc. within Temenos Infinity, and may vary from institution to institution.

For example, an institution may have ten different types of auto accounts. They can map those ten different codes to the Auto account type, and then use the account type field to select auto.

The Account Types page in System Management (System Management > Account Types) displays a list of the

current account types populated in Temenos Infinity. From this page, administrators are able to create and manage the account types available at their institution, as well as map interface codes to the appropriate account types in Temenos Infinity.

> Account Types included in a batch import file are not automatically added to this list; they must be manually added. If a new product and code is added to the core system, it is required that the new value is added to Account Type Mappings. If code is imported into Temenos Infinity, and there is no account type mapping for it, the code is set to Miscellaneous, and the exact account type is not known.



Code	Description	Base Type	Read Only	Last Modified	Modified By
AD	Auto Direct	Auto	☐	10/27/2008 01:28 PM	Admin, Admin
AI	Auto Indirect	Auto	☐	10/27/2008 01:28 PM	Admin, Admin
AUTO	Auto loans	Auto	☐	5/30/2006 08:43 AM	Admin, Admin
AN	Auto New	Auto	☐	10/27/2008 01:28 PM	Admin, Admin
AND	Auto New Direct	Auto	☐	10/27/2008 01:29 PM	Admin, Admin
ANI	Auto New Indirect	Auto	☐	10/27/2008 01:29 PM	Admin, Admin
AU2	Auto Used	Auto	☐	4/24/2018 01:20 PM	
AUD	Auto Used Direct	Auto	☐	10/27/2008 01:29 PM	Admin, Admin
AUI	Auto Used Indirect	Auto	☐	10/27/2008 01:29 PM	Admin, Admin
BUS	Business	Unsecured	☐	10/31/2008 12:36 PM	Admin, Admin

The Account Types page includes the following two tabs:

- Account Types
- Account Mappings

Account Types

The Account Types tab displays a list of the account types configured in Temenos Infinity, and enabled system administrators to create and manage the account types for their institution.

This tab is open by default when the Account Types page is accessed in System Management, and displays the following columns of information for each account type:

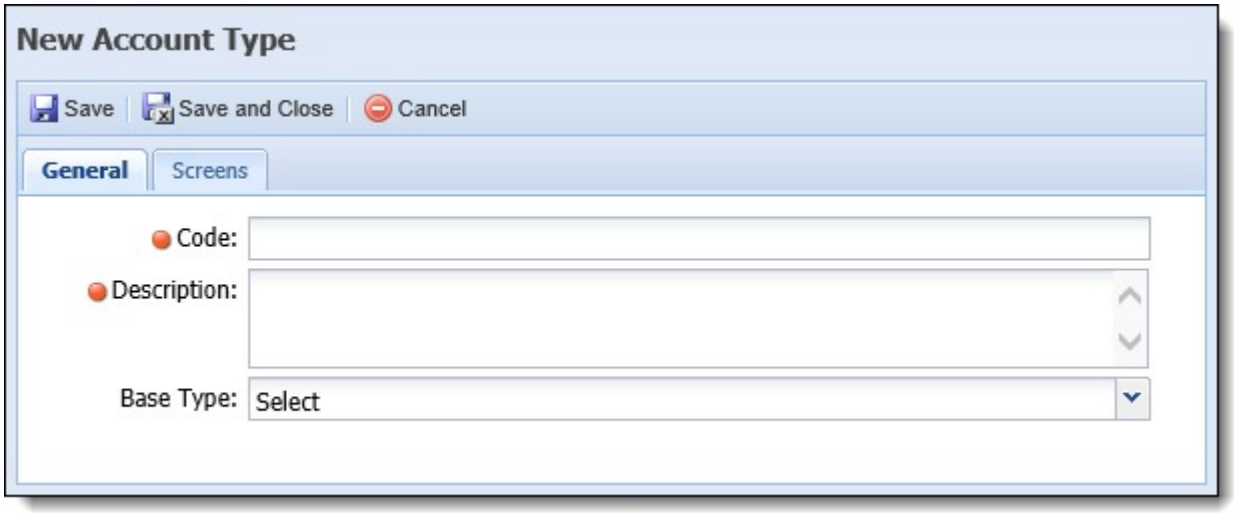
Column Name	Description
Code	Displays the code associated to the account type. This code needs to match account types being imported from the core.
Description	The actual name of the account type.
Base Type	Displays what the account type is based on.

Read Only	Displays a ☑ to identify the account type as read-only. Account Types marked as Read Only can be copied, but not edited. Standard Account Types, such as Credit Card, Deposit, Misc, and Mortgage are read-only.
Last Modified	Denotes when the account type was last modified.
Modified By	Denotes who made the last modification on the account type.

Account Type Attributes

All account types share common attributes that are defined while creating, copying, or editing an account type.

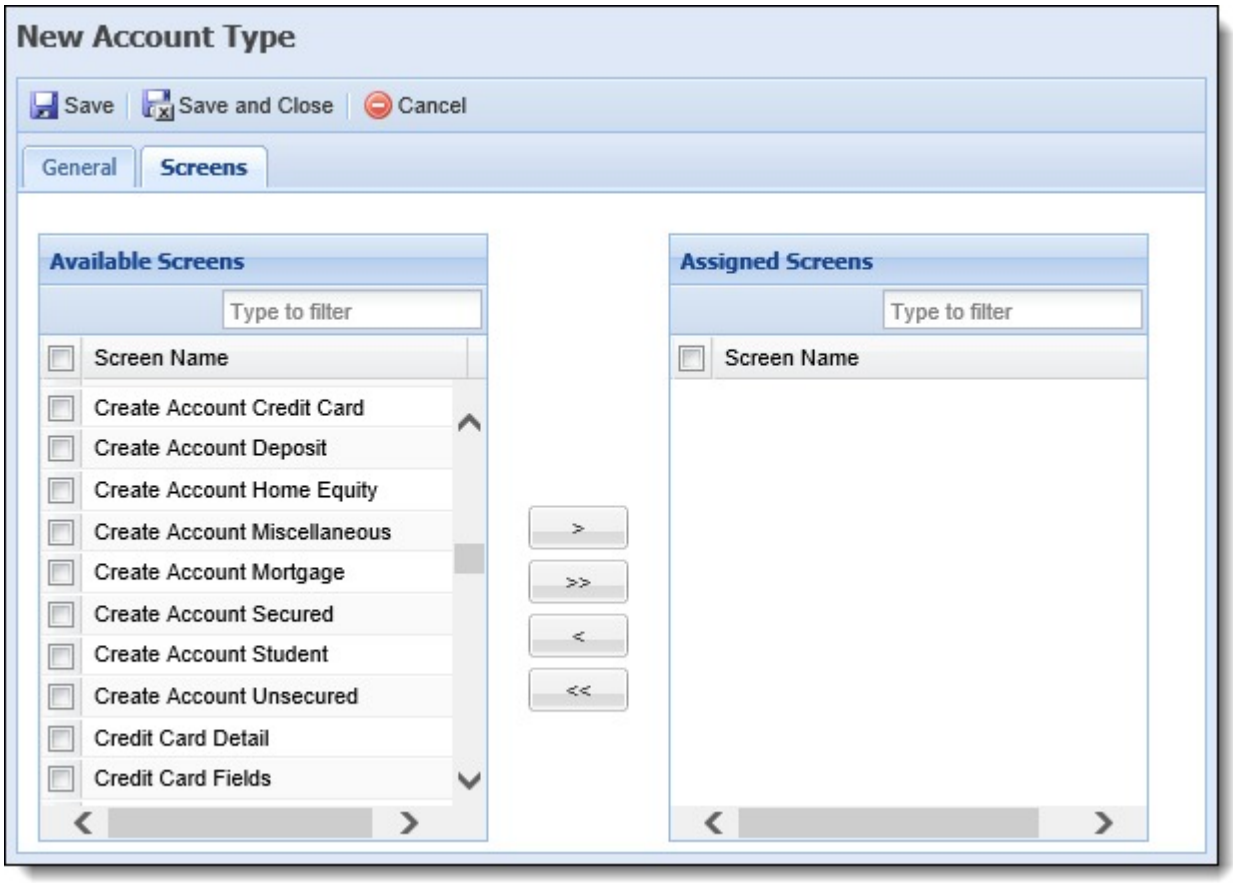
General



General attributes are located within the General Tab:

Field	Description
Code	Enter the code of the new account type. This is a required field.
Description	Enter the description of the new account type. This is a required field.
Base Type	Select a base type from the drop-down list. Base types are system defined.

Screens



Screen attributes are located within the Screens Tab:

Field	Description
Available Screens	Displays a list of all Account screens configured in System Management > Screens. Assign screens to the account type by selecting a screen from the list, and moving it to the Assigned Screens box using the arrows that display.
Assign Screens	Displays the screens that have been assigned to the account type. When the account type is active in the workspace, the screens in the Assigned Screens box are available within the Screens menu in the left navigation panel. The selected screens should apply to the account type. For example, an auto loan should not have a credit card screen assigned, but should have an auto collateral screen assigned. The order of the screens listed in the workspace screen menu can be rearranged by dragging and dropping screens in the Assigned list. This is not a required action.

Creating and Managing Account Types

The buttons within the top of the Account Types tab provide administrators with the ability to perform the following actions:

- Create an Account Type
- Copy an Account Types

- Edit an Account Type
- Delete an Account Type

Create Account Types

To create an Account Type:

- Click Create within the top of the Account Types page.
- The New Account Type screen appears.
- Define the General attributes for the account type.
- Once all General attributes are defined, navigate to the Screens tab and assign screens to the account type.
- When finished entering all attributes, click Save and Close to create the new account type.

> If authoring Business Rules, it is recommended to select the **Sync.Lookups button** on the Application Toolbar in Rules Manager before authoring a new rule in order to ensure the newly created Account Type is available within the Rules Management Application.

Copy Account Types

To copy an account type:

- Highlight the account type to be used as a base, and click Copy.
- The Copy Account Type screen appears with the values from the selected account type.
- Make any necessary changes to the new account type in the General and Screens tabs.

> The code for the new account type cannot match an existing account type code in Temenos Infinity; therefore, when copying an existing account type, the Account Type Code must be changed within the General tab.

- When finished making changes, click Save and Close to create the new account type.

Edit Account Types

To edit an existing account type:

- Double- click the account type to be modified within the grid, or highlight the account type, and click Edit.
- The Edit Account Type screen appears.
- Make any necessary changes to the account type in the General and Screens tabs.
- When finished making changes, click Save and Close to retain the account type attributes.

Delete Account Types

To delete an account type:

- Highlight the account type to be removed, and click Delete.
- A confirmation message appears. Click **Yes** to delete the Account Type. Click **No** to return to the Account Types page without deleting the account type.

Exporting Account Types

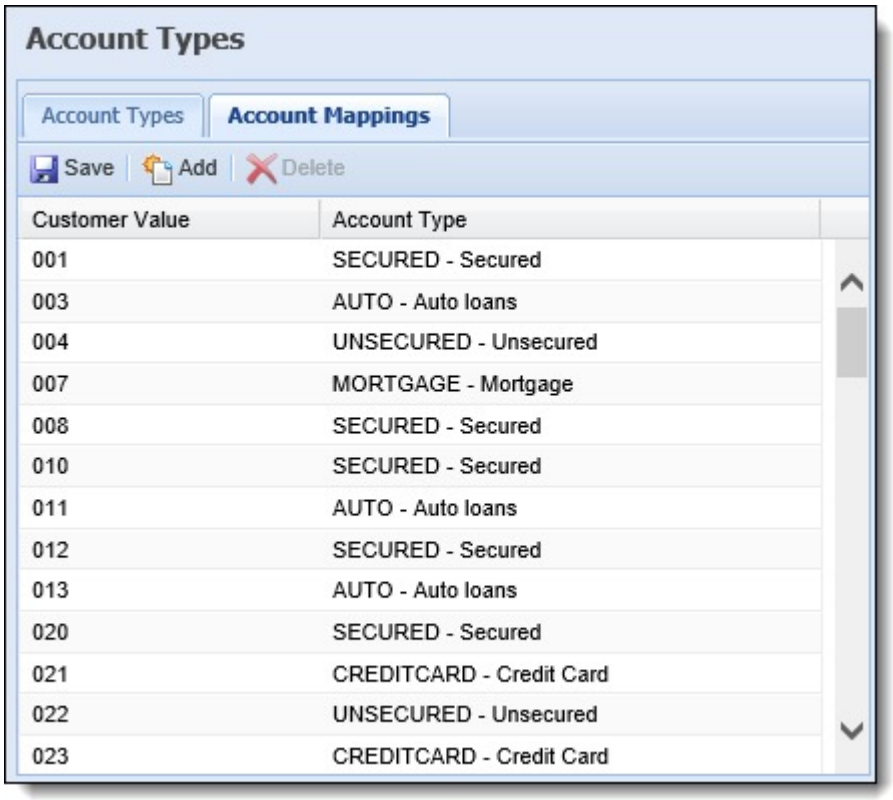
To export account type:

- Click Export.
- A message appears that prompts users to Open or Save the exported file.
  - Click open to open the file in Microsoft Excel.
  - Click save to save the file to a local or network drive.

Account Mappings

The Account Mappings tab includes an editable grid that allows administrators to map interface codes to the appropriate account types in Temenos Infinity.

> Any Customer Values that are not mapped default to the "Miscellaneous" account type.



The following columns display within the Account Mappings tab:

Column Name	Description
Customer Value	An editable column that enables the ability to define the value to be mapped to the specific account type imported from the core.

Account Type	An editable column that enables the ability to select the account type to be mapped to the value defined in the Customer Value column. The values in this column are displayed in the following format: <Account Type Code> - <Account Type Description>. By default, account types are listed in ascending order according to the Customer Value. If desired, the values in the Account Type column can be sorted in ascending or descending alphabetical order. To sort the values alphabetically, click the Account Type header in the top of the grid, or click the that appears when hovering over the header, and select the desired sort type from the drop-down list. When sorted alphabetically, account types are listed alphabetically by code, and not by the description. Additionally, the alphabetical sort is not maintained once the Account Types page is closed.

The buttons within the top of the tab allow administrators to perform the following actions:

- Add An Account Mapping
- Delete an Account Mapping

Adding an Account Mapping

To add an account mapping:

- Click Add.
- A new row appears in the grid.
- Within the new row, click in the Customer Value column, and enter the value to be mapped to the account type.
- Click in the Account Type column to select the desired account type to be mapped to the customer value from a drop-down list. This list includes all of the account types configured within the Account Types tab.
- Once all values have been mapped to the appropriate account types, click Save to retain the account type mappings.

The mapping to account types does not automatically occur when new mappings are added via this screen. The actual mapping to account types occurs during the morning batch import process.

Deleting an Account Type

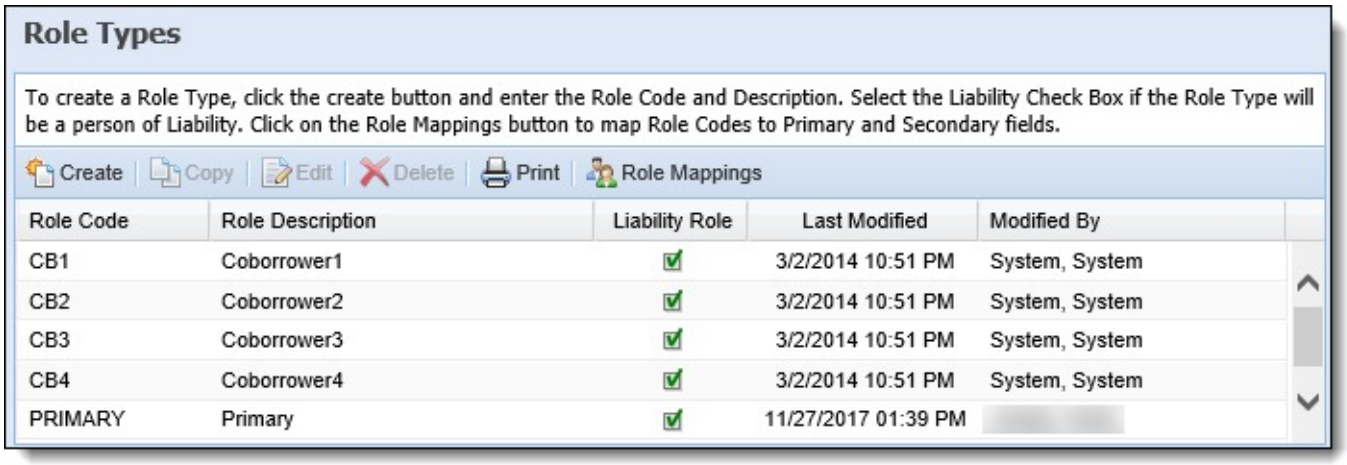
To remove an account mapping:

- HIghlight the desired row in the Account Mapping grid, and click Delete.
- A message appears to confirm that the mapping should be deleted. Click **Yes** to remove the mapping, or **No** to retain the mapping, and return to the Account Mappings tab.
- Upon clicking Yes, the mapping is removed from the grid.

Role Types

The Role Types page in System Management (System Management > Role Types) provides the ability to manage the role types available within Temenos Infinity. Role Codes provided by the host must be added to the Role Type

list within the system.



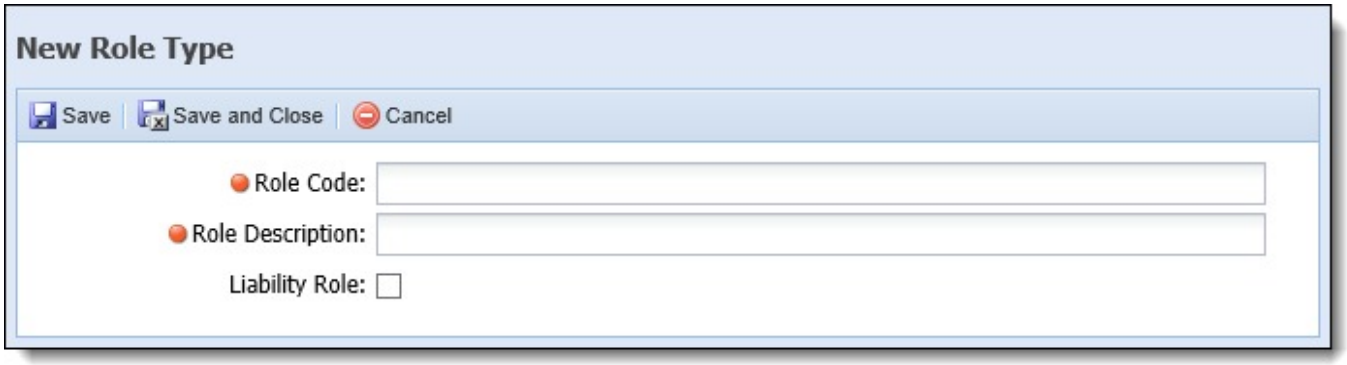
The following columns display on the Role Types page:

Column Name	Description
Role Code	Used to assign roles imported from the core to Role Types within Temenos Infinity. Role Codes can also be assigned to secondary roles in Role Mappings. Role Codes must match exactly the codes that are being provided in the file to be imported.
Role Description	Denotes the full name of the Role Type.
Liability Role	If selected, denotes that the Role Type is considered a liability role on an account.
Last Modified	Denotes when the Role Type was last modified in Temenos Infinity.
Modified By	Denotes what user made the last modification on the Role Type.

By navigating to the System Management > Role Types page, administrators can create new role codes, edit existing role codes, set role mappings, delete existing role codes, copy existing role codes, refresh role codes, and print the role codes grid.

Role Type Attributes

All role types share common attributes that are defined while creating, copying, or editing a role type.



Field	Description
Role Code	Enter the role code provided by the host. This is a required field.
Role Description	Enter the full name of the role type. This is a required field.

Liability Role	Select the check box to identify the role type as a liability role on an account.

Creating a Role Type

To create a role type:

- Click **Create**.
- The New Role Type screen appears.
- Enter the role type attributes.
- When finished, click **Save and Close** to create the new role type, and return to the role types page.
- The new role is now available to be mapped to certain features throughout Temenos Infinity.

Copying a Role Type

To copy a role type:

- Highlight the desired role type in the grid, and click **Copy.**
- The Copy Role Type screen appears. Make any necessary changes to the role type.
- When finished, click **Save and Close** to create the role type, and return to the Role Types page.
- The new role is now available to be mapped to certain features throughout Temenos Infinity.

Editing a Role Type

To edit a role type:

- Double-click the desired role type in the grid, or highlight the role type and click **Edit**.
- The Edit Role Type screen appears.
- Make any necessary changes to the role type attributes.
- When finished, click **Save and Close** to retain the modifications, and return to the Role Types page.

Deleting a Role Type

To delete a role type:

- Highlight the desired role type in the grid, and click **Delete**.
- A confirmation message appears. Click **Yes** to delete the Role Type. Click **No** to return to the Role Types page without deleting.

Printing a Role Type

To print the role type grid:

- Click **Print**. A print preview appears.

Role Types

	Role Code	Role Description	Liability Role	Last Modified	Modified By
1	CB1	Coborrower1 role during upgrade	True	[illegible]	System
2	CB2	Coborrower2 role during upgrade	True	[illegible]	System
3	CB3	Coborrower3 role during upgrade	True	[illegible]	System
4	CB4	Coborrower4 role during upgrade	True	[illegible]	System
5	PRIMARY	Primary role during upgrade	True	[illegible]	System

Role Mappings

Although all roles and people are imported from the core, the system allows for up to eight secondary roles to be mapped to specific fields in the field list. The Role Mappings feature allows administrators to map specific role types to secondary fields.

If more than one role code is mapped to a specific role mapping, and there is a person that holds each of the roles on the account, the system maps the first person that matches the role on the account. Also, if there are two people that hold the Joint Owner role, the system imports the first person that has that role in the file.

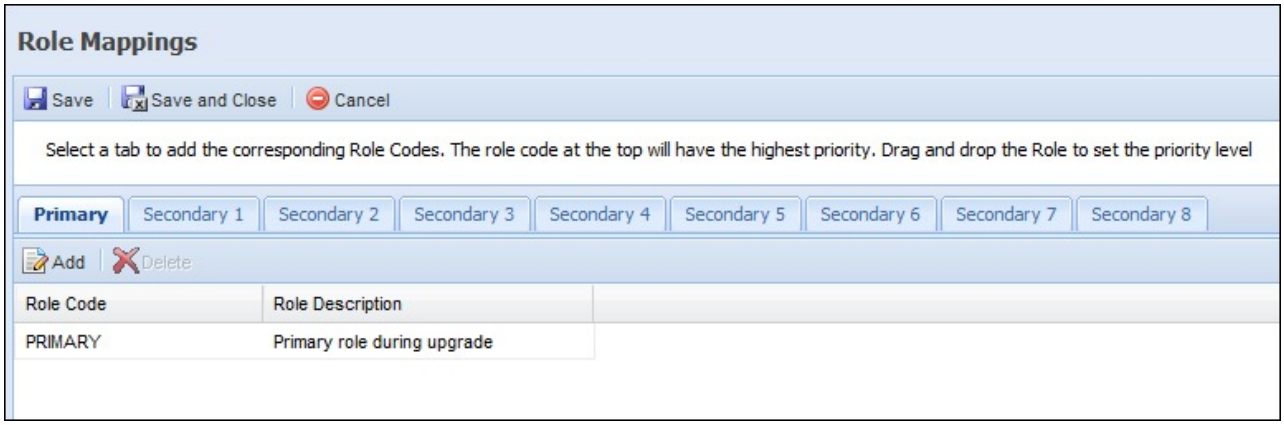
This feature is useful when building letters within Temenos Infinity. For example, when building a letter template in the letter template editor, secondary role fields are available to include in the letter template. If Joint Owner is mapped as Secondary 2 and Secondary 2 fields are included in the letter template and have a role on the account, the template populates the Joint Owner's information. This allows for both the Primary and Joint Owner's information to be populated in the same letter template.

The primary role code within the database is imported into Temenos Infinity and automatically mapped to all letters upon completion of the first batch import. For more information, please see the connector guide for the applicable core interface.

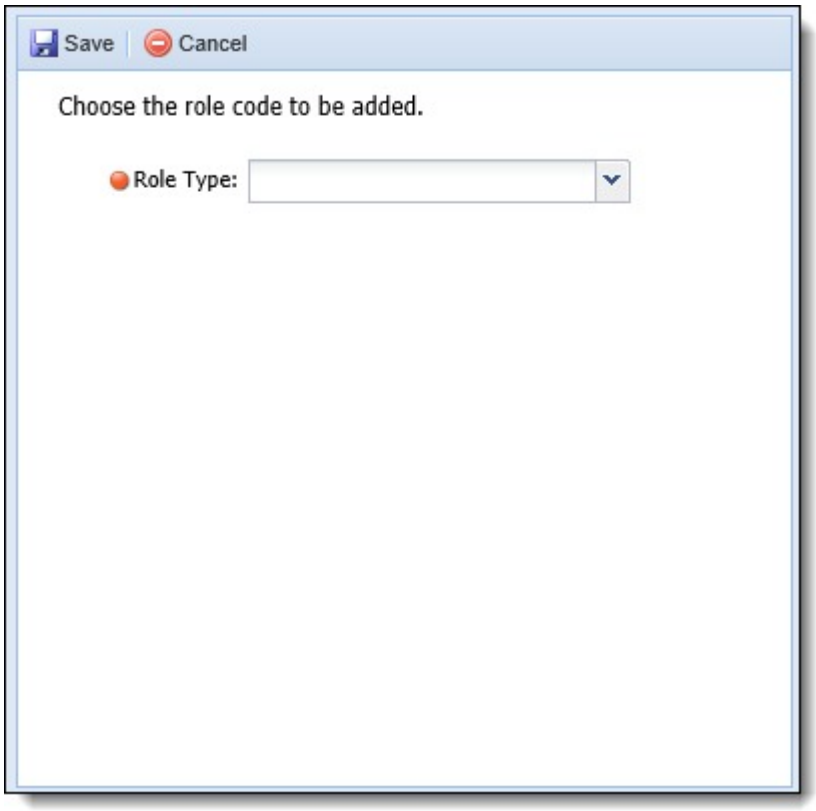
Configure Role Mappings

To map roles to fields in the field list:

- Click Role Mappings. The Role Mappings window appears:



- Click **Add** to assign a Role Code to each Role Type. Upon clicking **Add**, the following window appears:



- Select the desired role type from the drop-down list, and click **Save**.
- Navigate through the tabs to add role codes for each role type.
- When finished assigning roles, click **Save and Close** to retain the role mappings, and return to the Role Types page.

Phone Number Classification

In compliance with the standards set forth by the Telephone Consumer Protection Act (TCPA), Temenos Infinity supports the ability to categorize phone numbers as mobile regardless of how they are classified in the core system. The Phone Number Classification process reviews phone numbers imported, and compares them with phone numbers already in the system. If a phone number is not classified as mobile in the core system, but is classified as mobile in Temenos Infinity, the phone number is marked as Misclassified and the phone classification type is set to mobile or landline, alerting Temenos users and third parties that the number should not be called, as financial institutions must have permission from account holders to call their mobile phone numbers.

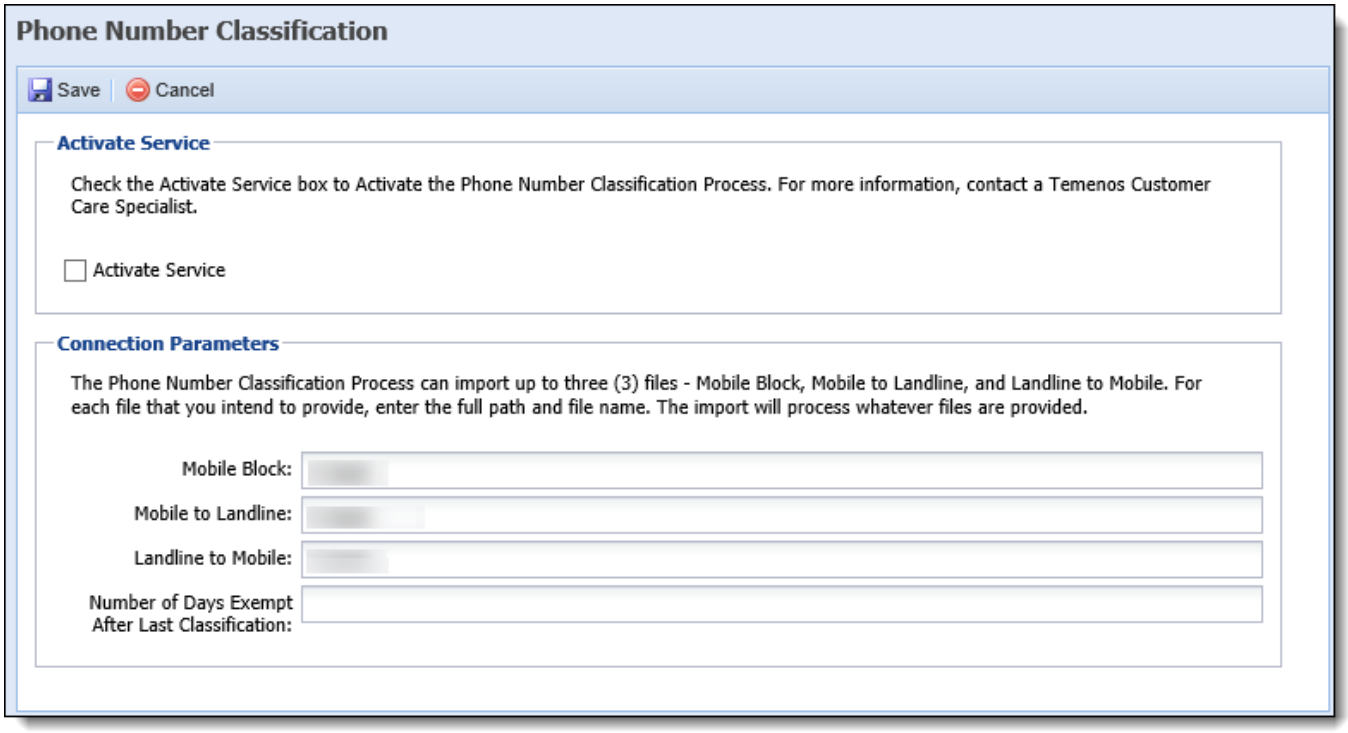
The Phone Number Classification screen in System Management (System Management > Collections > Phone Number Classification) provides administrators with the ability to enable the phone number classification process and configure the phone number classification files imported from the data provider.

Phone number classification data is provided by Interactive Data; however, other data providers can be used if they meet the file specifications. Please contact Interactive Data for more information on their phone number classification service. If interested in using another provider of phone classification data, please contact Temenos for the requirements.

To contact Interactive Data, please visit https://ididata.com/, or call one of the following phone numbers:

- Toll Free: (866) 584-2295
- Direct: (678) 584-5252

Access to the Phone Number Classification screen is controlled by the Phone Number Classification permission in Users and Security Groups.



Phone Number Classification Attributes

The Phone Number Classification screen contains the following fields:

Field	Description
Activate Service	Select this check box to activate Phone Number Classification functionality.
Mobile Block	Enter the full path and file name of the Mobile Block file. The Mobile Block file contains a range of phone numbers provided by a wireless carrier.
Mobile to Landline	Enter the full path and file name of the Mobile to Landline file. The Mobile to Landline file contains a list of phone numbers that changed from cellular to landline.
Landline to Mobile	Enter the full path and file name of the Landline to Mobile file. The Landline to Mobile file contains a list of phone numbers that changed from landline to cellular.

Number of Days Exempt after last Classification	Enter the number of days after the last phone classification process that a phone number should be exempt from execution of the next phone classification process. For example, setting this field to "7" identifies that any files classified within the last 7 days should be exempt from classification during the next phone classification process.

It is not required to import all three of the Phone Number Classification files into Temenos Infinity. If a file is not being imported, it is not necessary to complete the corresponding field on the Phone Number Classification screen. Files that do not contain field paths and file names on the Phone Number Classification screen are not imported into Temenos Infinity.

The data in the Mobile Block file is refreshed on a monthly basis. The data in the Mobile to Landline and Landline to Mobile files is refreshed daily.

Once all fields have been completed, click Save. Click Cancel to disregard any changes.

Phone Number Classification Fields

In order to view the phone number classification for a person in the workspace, the Misclassification Flag and Misclassification Date fields are available for addition to the Person Phone panel as read-only fields. Additionally, the Ready to Dial Flag is available for addition to the Person Phone panel as a read-only field. The Ready to Dial flag is automatically set to true when the Misclassification Flag is false and the TCPA Consent flag is true, serving as an additional indicator to a user that the phone number can be called.

In addition to the availability for screens, the Misclassification Flag, Misclassification Date, and Ready to Dial Flag are available for use in reports and views.

Phone Number Classification History Panel

The Phone Classification History panel is a read-only panel that is available for addition to Person screens in System Management > Screens to provide an overview of the phone classification history for a person in the workspace. This panel displays a historical account of the phone classification dates and phone classification types that are set for the person in context each time the phone classification process is run.

Phone Classification History

Phone Number	Phone Type	Classification Type	Classification Date
	HOME	Mobile	09/15/2016
	HOME	Mobile	09/14/2016

Phone Number Classification Process

The Phone Number Classification process looks for a mismatch in the Phone Type set for a phone number between what is currently in Temenos Infinity and what is imported from the phone classification files. Once the Mobile Block, Mobile to Landline, and Landline to Mobile information is imported into the system, the phone Misclassification Flag is set as follows:

The Classification Type and Classification Date can be viewed within the Phone Classification Type Panel assigned in System Management > Screens.

Phone Number Included in this File	Misclassification Flag Behavior
Mobile Block	Phone numbers in the Mobile Block file are compared to person phones already in the system, and, if the number in Temenos Infinity DOES NOT have a Phone Type of Mobile Phone, the following occur: • The Misclassification Flag is set to true. • The Misclassification Date is set to today. • The Classification Type is set to Mobile.
Mobile to Landline	Phone numbers in the Mobile to Landline file are compared to person phones already in the system, and, if the number in Temenos Infinity DOES have a Phone Type of Mobile Phone, the following occur: • The Misclassification Flag is set to true. • The Misclassification Date is set to today. • The Classification Type is set to Landline.
Landline to Mobile	Phone numbers in the Landline to Mobile file are compared to person phones already in the system, and, if the number in Temenos Infinity DOES NOT have a Phone Type of Mobile Phone, the following occur: • The Misclassification Flag is set to true. • The Misclassification Date is set to today. • The Classification Type is set to Mobile.

The Phone Number Classification process does not monitor for the same phone number in multiple files. If the same phone number exists in multiple files, the Misclassification Flag could be set to true due to one import file, then switched to false due to a subsequent import file.

The Misclassification Flag is removed and the Misclassification Date is cleared when a phone number is changed in Temenos Infinity. A phone number change can be made manually or through a batch import, real time update, or profile import.

File Layouts

Mobile Block File Layout

A full refresh of the Mobile Block file is provided on a monthly basis. This file is comma delimited with a carriage return line feed (CR LF) and an expected size of 6,500 KB. The following is a sample layout of the Mobile Block file:

Area Code	Separator	Prefix	Separator	1000's Block	Separator
201	,	202	,	0	CR LF

In this example file layout, phone numbers 201-202-0000 through 201-202-0999 are assigned to a wireless provider and are inserted into the Starting Block and Ending Block database fields with a Classification Type of Mobile Block.

Mobile to Landline File Layout

A full refresh of the Mobile to Landline file is provided on a daily basis. This file contains a 10-digit phone number followed by a line feed (LF) and has an expected size of 16,600 KB. The following is a sample layout of the Mobile to Landline file:

Phone Number	Separator
2012000080	LF

In this example file layout, phone number 201-200-0080 is assigned to a wireless provider and is inserted into the Phone Number database field. It has a Classification Type of Mobile Ported to Landline.

Landline to Mobile File Layout

A full refresh of the Landline to Mobile file is provided on a daily basis. This file contains a 10-digit phone number followed by a line feed (LF) and has an expected size of 16,600 KB. The following is a sample layout of the Landline to Mobile file:

Phone Number	Separator
2012000070	LF

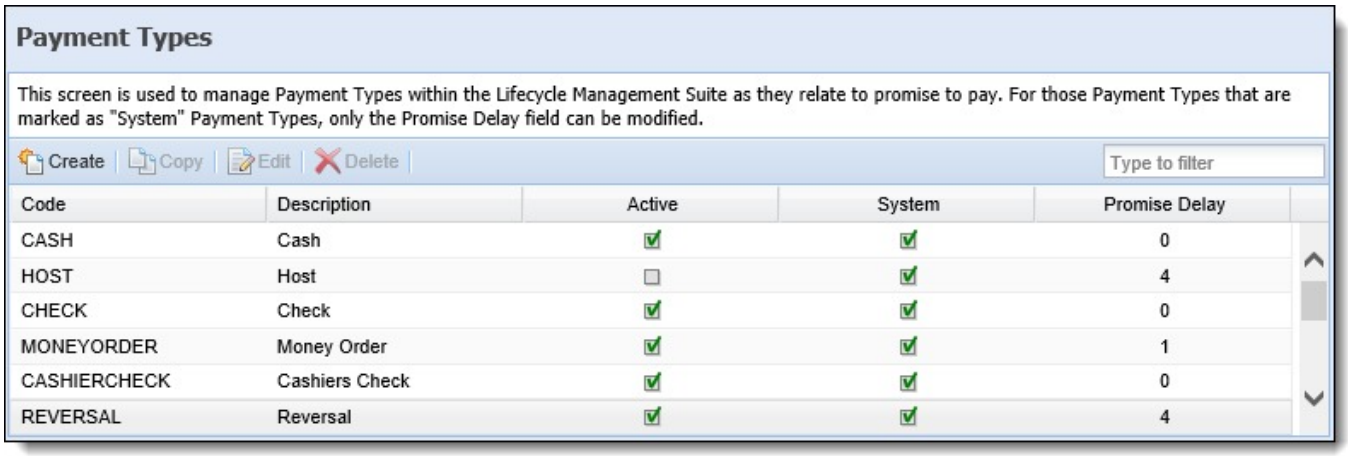
In this example file layout, phone number 201-200-0070 is assigned to a wireless provider and is inserted into the Phone Number database field. It has a Classification Type of Landline Ported to Mobile.

Promise to Pay

Payment Types

The Payment Types page (System Management > Payment Types) allows administrators to manage Payment Types within Temenos Infinity as they relate to promise to pay. When a user runs the promise to pay workflow step on a person/account, they are presented with a Payment method drop-down, which is controlled by the Payment Types configured in this page.

> While this topic has been updated to reflect the new Temenos Infinity branding, Lifecycle Management Suite will continue to appear in the instructions for this page until such a time that the branding can be updated.



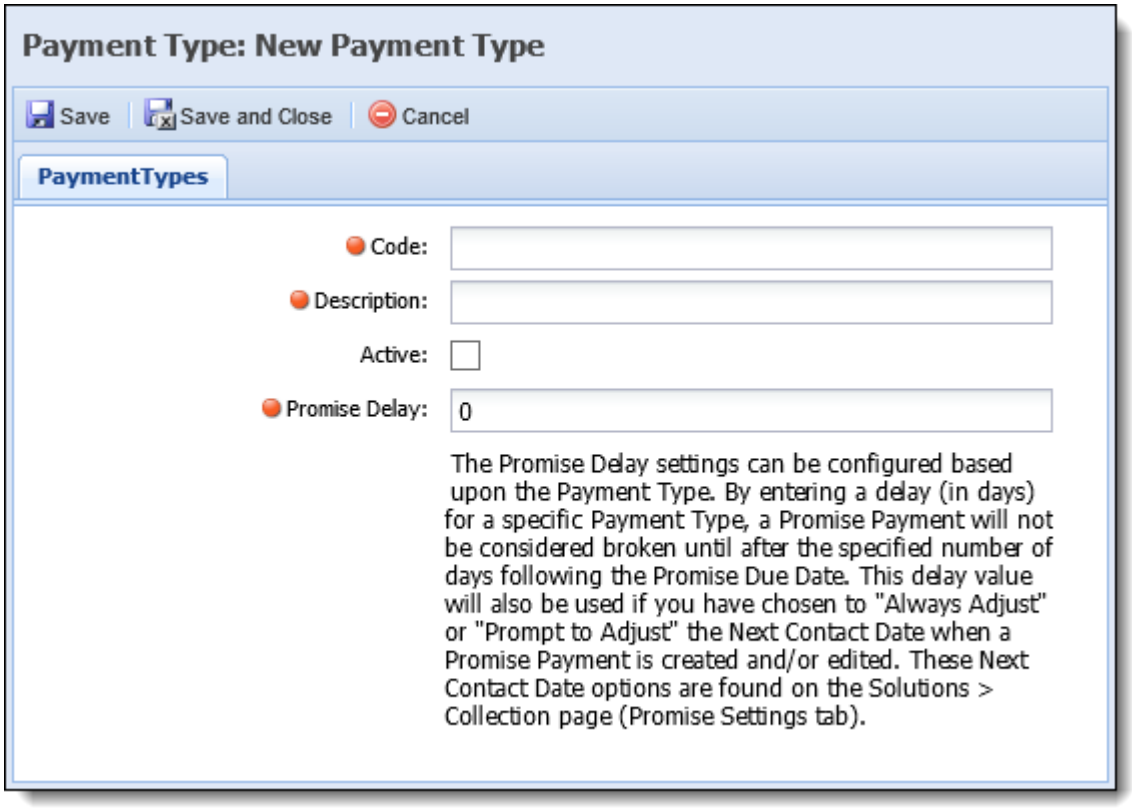
The following columns display on the Payment Types page:

Column Name	Description
Code	Displays the assigned code of the payment type.
Description	Displays the description of the payment type.
Active	If checked, the payment type is active and available to users.
System	If checked, the payment type is labeled as "System." Any system payment types cannot be deleted or completely edited. Only the promise delay can be changed.
Promise Delay	Indicates the promise delay, in days, for the payment type.

From this page, administrators can perform the following actions:

Creating a Payment Type

- Click **Create**. The Create New Payment Type screen appears.



- Enter in a code for the payment type. This is a required field.
- Enter in a description for the payment type. This is what appears to the user when taking a promise to pay.
- To make the payment type active, click the **Active** checkbox.
- Enter in an amount, in days, for the promise delay. The Promise Delay settings can be configured based upon the Payment type. By entering a delay (in days) for a specific payment type, a Promise Payment is not considered broken until after the specified number of days following the Promise Due Date.
- When finished, click **Save** or **Save and Close** to save the new payment type and return to the Payment Types page. The new payment type populates and is now available to users that run the promise to pay workflow step. Click **Cancel** to return without saving.

Copying a Payment Type

- Highlight the payment type that is to be copied.
- Click **Copy**. The Copy Payment Type screen appears.
- Make any necessary changes to the new payment type making sure the Code value does not match any other code.
- When finished, click **Save** or **Save and Close** to save the new payment type and return to the Payment Types page. The new payment type populates and is now available to users that run the promise to pay workflow step. Click **Cancel** to return without saving.

Editing a Payment Type

- Highlight the payment type that is to be edited.
- Click **Edit**. The Edit Payment Type screen appears.
- Make any necessary changes to the payment type.
- When finished, click **Save** or **Save and Close** to save the payment type and return to the Payment Types page. Click **Cancel** to return without saving.

> System payment types cannot be edited. The only field that can be changed if editing a system payment type is the Promise Delay setting.

Deleting a Payment Type

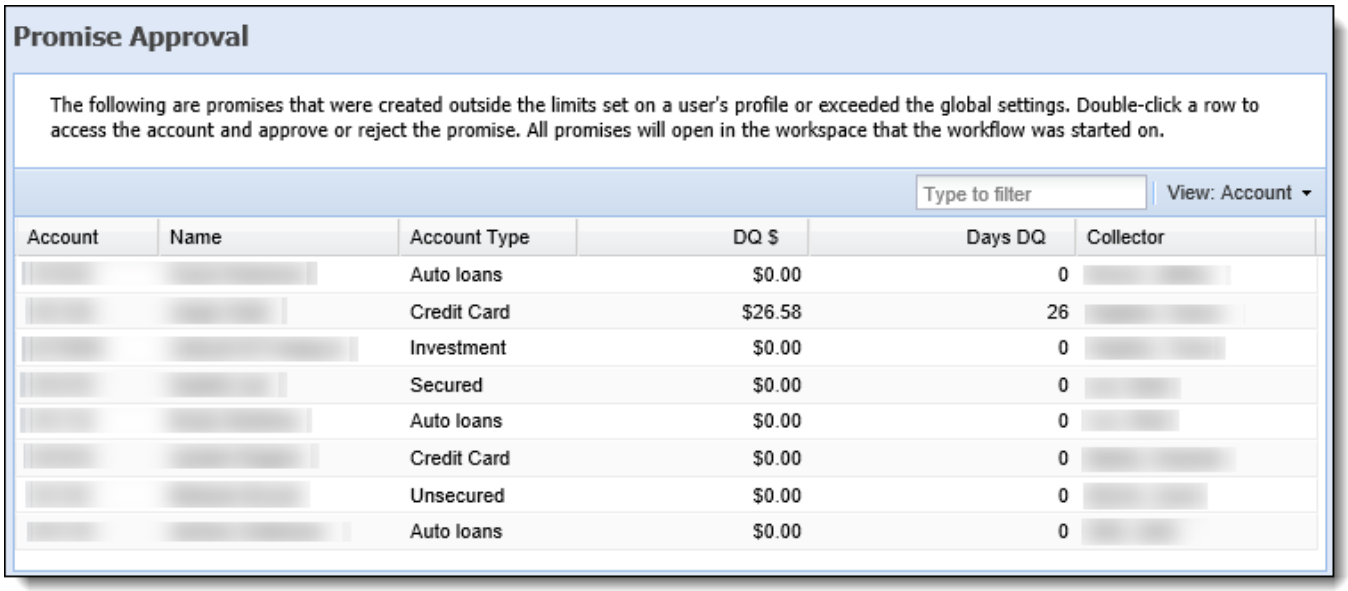
- Highlight the payment type that is to be deleted.
- Click **Delete**.
- A confirmation message appears. Click **Yes** to delete the payment type. Click **No** to return to the Payment Types page without deleting.

> System payment types cannot be deleted.

Promise Approval

The Promise Approval page in System Management (System Management > Collections > Promise Approval) displays promises that were created outside the limits set on a user's profile or exceeded the global settings. When a promise to pay workflow step is executed and a user exceeds or does not meet the standards set by the administrator, the promise is assigned to the administrator/manager in this page.

> Promises that are pending approval are not queued in Collection Queues.



The following columns display on the Promise Approval page:

Column Name	Description
Account	When the View drop down is set to Account, the account number of the person associated to the promise. When the View drop down is set to Person, the number of accounts associated to the promise for the person displayed.
Name	The Primary name on the account.
Account Type	The type of account the promise was made on.
DQ$	When the View drop down is set to Account, the total DQ amount on the account. When the View drop down is set to Person, the total DQ amount of the Person as a whole.
Days DQ	When the View drop down is set to Account, the amount of days the account is DQ is displayed. When the View drop down is set to Person, the highest amount of days the person is DQ is displayed.
Collector	The name of the collector who took the promise to pay.

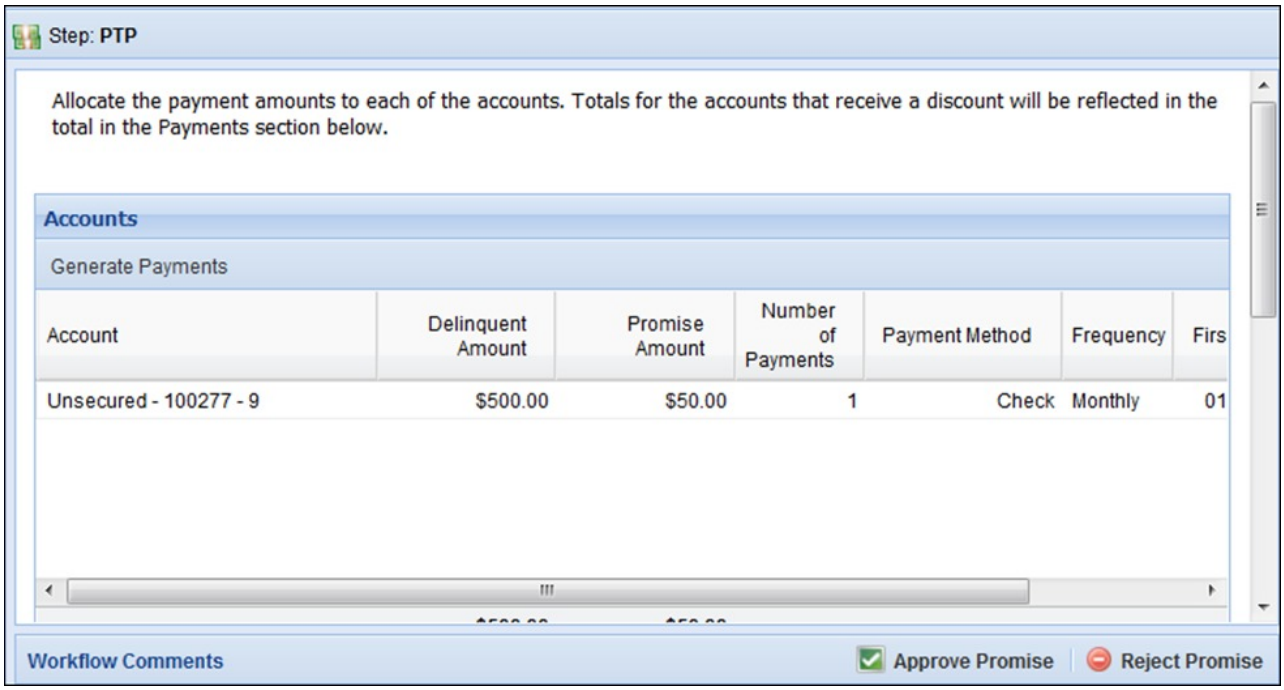
The promise settings that prompt the user to send for manager approval are set in the individual user's settings in System Management > Users. For more information, please see the Users topic in this guide.

The manager/administrator reviewing and approving/rejecting promises must have their collection settings set to greater than the end-users. The system does not allow the approval of promises if collection settings for the manager are equal to or less than the end-users settings.

Reviewing a Promise

To review a promise:

- Double-click a promise within the Promise Approval screen.
- The account associated to the promise opens in the workspace. The Promise to Pay step appears showing the details of the promise.



- If necessary, make any changes to the promise to pay by editing the information within the columns.

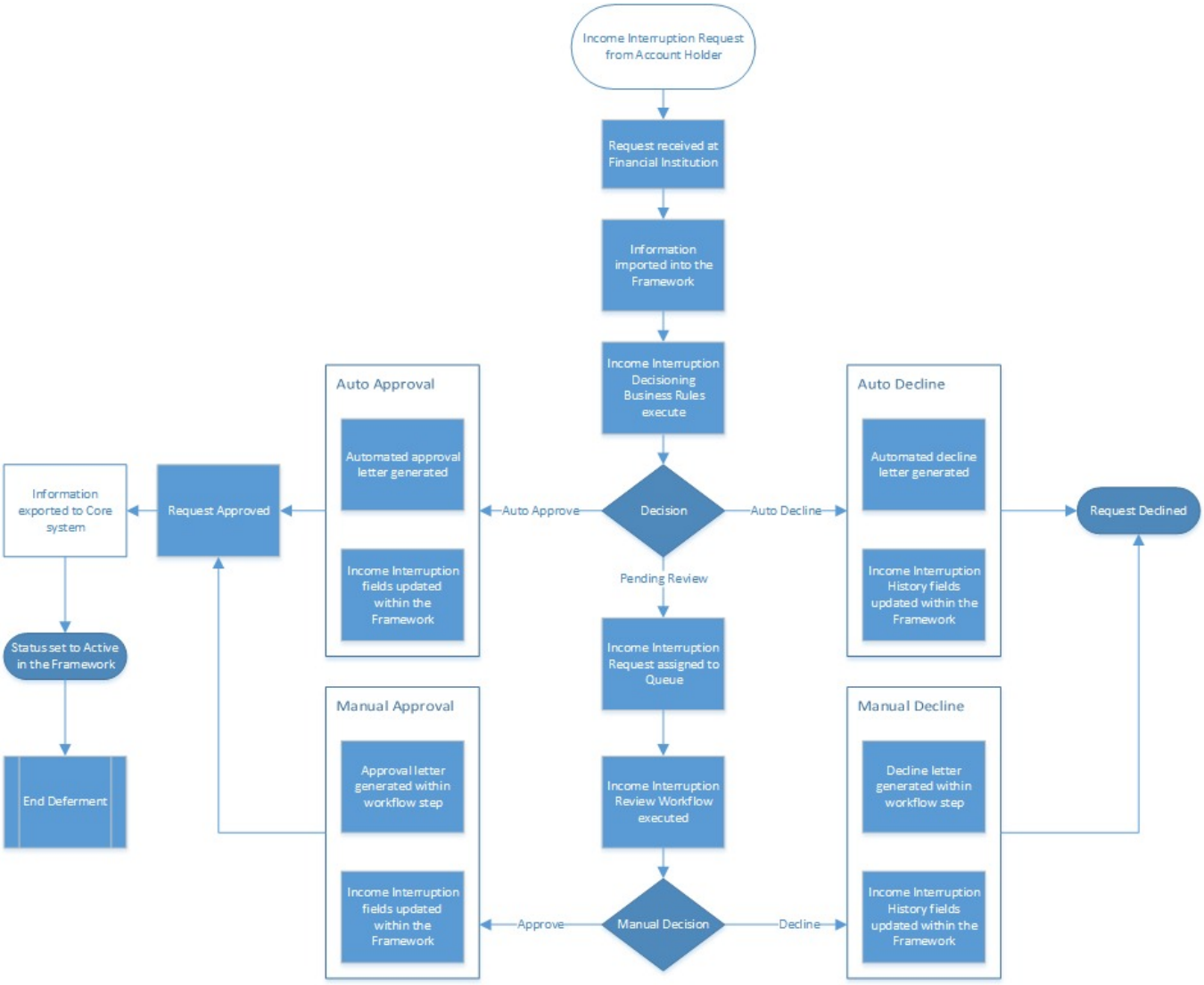
> For more information on the workflow step, see the Promise to Pay Workflow Step topic in the User Guide.

- To approve the promise, click **Approve Promise.** The workflow history screen updates indicating the workflow completed and updates the next contact date reflecting when the promise takes effect.
- To reject the promise, click **Reject Promise**. A message appears indicating the workflow was canceled successfully. The workflow history screen updates indicating the workflow was canceled. The promise is also removed from the Promise Approval page.

Income Interruption Overview

Income Interruption is a deferment process that account holders are able to request through their financial institution based on the occurrence of a specific event, such as a labor union strike or natural disaster. System administrators can configure business rules to automatically decide whether or not their accounts meet eligibility for this process, as well as assign disposition actions to automatically occur as a result of whether or not eligibility requirements are met.

The diagram below provides an overview of the Income Interruption process in Temenos Infinity:



Import of Information

> To enable and configure the Income Interruption Import for your institution, please contact a Temenos Customer Care Representative.

Temenos Infinity is able to accept one or more daily batch import files of accounts requesting an Income Interruption. Requests for deferment are imported into Temenos Infinity via comma-delimited text files including the following information:

- Account Identifier
- Date of Request
- Event Code A four character alphanumeric code imported with the Income Interruption import that is used to identify an event and group requests together in Temenos Infinity.
- Source Code A one character code identifying the source of the request such as (W) for Web or (P) for Phone.
- Phone Number

Automated Decision Process

After an Income Interruption request is imported, it is automatically run through a decisioning process using

Business Rules. Administrators can configure business rules under the **IncomeInterruptionDecisioning** category in System Management > Collections > Rules Management to determine eligibility requirements and assign disposition actions to occur based on whether or not the request meets eligibility.

Account Eligibility

Income Interruption Decisioning rules can be configured by the system administrator to determine one of the following results:

Automatically Decline

When an Income Interruption request is automatically declined, an automated letter is generated to the account holder explaining the reason for decline, the status is set to **Declined** and the following Income Interruption History fields are updated within the system:

- Decision Date
- Decision Reason
- Decision Letter

Automatically Approve

When an Income Interruption request is automatically approved, an automated letter is generated to the account holder, the status is set to Approved and the following Income Interruption fields are updated within Temenos Infinity:

- Decision Date
- Decision Letter ID
- Starting DQ Amount
- Starting Balance

With the Income Interruption Export, a file containing the approved accounts is exported back to the core processor and the status in Temenos Infinity is updated from **Approved** to **Active**.

Send for Manager Review

When configuring business rules for the Income Interruption process, system administrators can define eligibility conditions that do not meet the requirements for automatic approval or decline, requiring a manager to review the request and manually determine a decision.

When Manager Review is required, the Income Interruption status within Temenos Infinity is set to **Pending Review** and the **Decision Reason** is updated to reflect the reason identified within the Income Interruption Decisioning rule. The **Income Interruption Review** workflow step can then be used to approve or decline the Income Interruption request.

Depending on the decision, an approval or declination letter is selected within the workflow step and is sent to the **Batch Letter Printing** queue after execution of the Income Interruption Export.

Upon completion of the workflow, the account's Income Interruption status is updated from Pending Review to Approved or Declined and the applicable fields related to the decision are updated in Temenos Infinity.

Disposition Actions

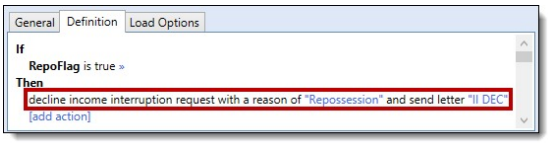
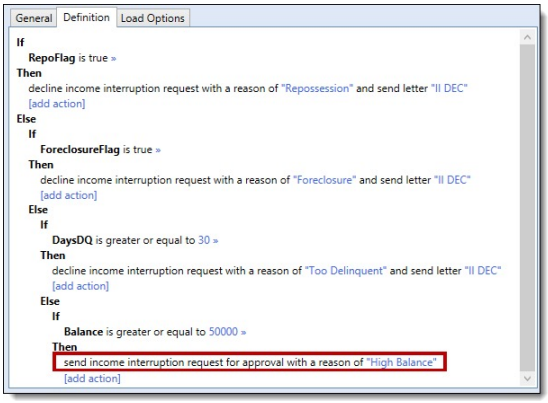
Disposition actions, such as generating a letter, are automated based on the eligibility of an account. Disposition actions are configured as part of the IncomeInterruptionDecisioning rule and vary depending on whether the request is declined, approved or sent for manager review.

Reference the table below for an overview of the disposition actions that could occur for an Income Interruption request in a declined, approved, or pending review status as well as information regarding where items related to those disposition actions are configured in the system:

Request Status	Disposition Action	Configuration
Declined	Generate an automated letter to the account holder explaining the reason for decline.	Decline letters for Income Interruption can be configured in System Management > Communication > Letters & Forms.
Approved	Generate an automated letter to the account holder and set a field on the account to identify it as in Income Interruption within the Related Accounts panel.	Approval letters for Income Interruption can be configured in System Management > Communicat > Letters & Forms. The Related Accounts panel can be configured to include the Is Income Interruption field and/or Status field in System Management > Screens. • IsIncomeInterruption is a flag field that can be set to identify an account as currently in income interruption. • Status is a field that can be used to identify whether an income interruption request is APPROVED, DECLINED, PENDING_REVIEW or ACTIVE.
Pending Review	Send the request to a manager to complete the analysis and determine the disposition of the request.	Requests in need of manager review can be approved or declined through execution of the Income Interruption Review workflow step. This workflow step can be configured to appear in a workflow in System Management > Workflow >Workflows.

Rule Configuration

An account's eligibility for income interruption and the disposition action that occurs as a result of whether or not eligibility is met are defined within the IncomeInterrutpionDecisioning rule configured in Rules Manager. Use the following table to assist with configuring business rules for the income Interruption process:

Action Template	What it Does	Category Selection
Auto-Decline Income Interruption Request	Automatically declines an income interruption request, identifies a reason for the decline and assigns a letter to be sent to the account holder.  	IncomeInterruptionDecisioning
Auto-Pending Review Income Interruption Request	Automatically sets the status of the income interruption request to Pending Review and identifies the reason for manual review.  Accounts in a Pending Review status require a manual decision to be made by a manager. As aforementioned, income interruption requests can be manually approved or declined through execution of a workflow containing the Income Interruption Review workflow step.	IncomeInterruptionDecisioning

Auto-Approve Income Interruption Request	Automatically approves the income interruption request and assigns a letter to be sent to the account holder. 	IncomeInterruptionDecisioning

> With Income Interruption, accounts are evaluated individually, therefore, rules for Income Interruption should be written under the Root.Account entity.

For more information on authoring business rules, please see the Rule Authoring topic within this Guide.

Income Interruption in Temenos Infinity

System administrators can manage Income Interruption accounts in Temenos Infinity through the following features:

Feature	Description	Location
End Event Deferments Page	System Management page used to identify the end of a deferment period for accounts associated to a specific event code.	System Management > End Event Deferments
Income Interruption End Deferment Workflow Step	Workflow step is used to terminate an active deferment.	System Management > Workflow > Workflows
Income Interruption Review Workflow Step	Workflow step is used to manually approve or decline an Income Interruption request that did not meet the eligibility requirement(s) for automatic approval or automatic decline defined through business rules.	System Management > Workflow > Workflows

The following fields specific to the Income Interruption process are also available for use in Queues, Screens, Views, and Reports:

- Income Interruption Fields

Income Interruption fields capture information for all accounts in an Active, Approved, or Pending Review Income Interruption status.

When a deferment period ends, the account's Income Interruption status is set to Released after execution of the Income Interruption export and information for the account is then updated within the Income Interruption History.

Reference the table below for an overview of the available Income Interruption fields and their location in the system:

Field Name	Location
Status	Account > Income Interruption > Status
Import Date	Account > Income Interruption > Import Date
Decision Date	Account > Income Interruption > Decision Date
Release Date	Account > Income Interruption > Release Date
Event Code	Account > Income Interruption > Event Code
Source Code	Account > Income Interruption > Source Code
Account Number	Account > Income Interruption > Account Number
End Date	Account > Income Interruption > End Date
Decision Reason	Account > Income Interruption > Decision Reason
Decision User ID	Account > Income Interruption > Decision User ID
Decision Letter ID	Account > Income Interruption > Decision Letter ID
Release Type	Account > Income Interruption > Release Type
Release Letter Date	Account > Income Interruption > Release Letter Date
Release Letter ID	Account > Income Interruption > Release Letter ID
Is Income Interruption	Account > Income Interruption > Is Income Interruption
Starting DQ Amount	Account > Income Interruption > Starting DQ Amount
Starting Balance	Account > Income Interruption > Starting Balance
Ending DQ Amount	Account > Income Interruption > Ending DQ Amount
Ending Balance	Account > Income Interruption > Ending Balance

Income Interruption History Fields

Income Interruption History fields capture information for all accounts in a Declined and/or Released Income Interruption status. Reference the table below for an overview of the available Income Interruption History fields and their location in the system:

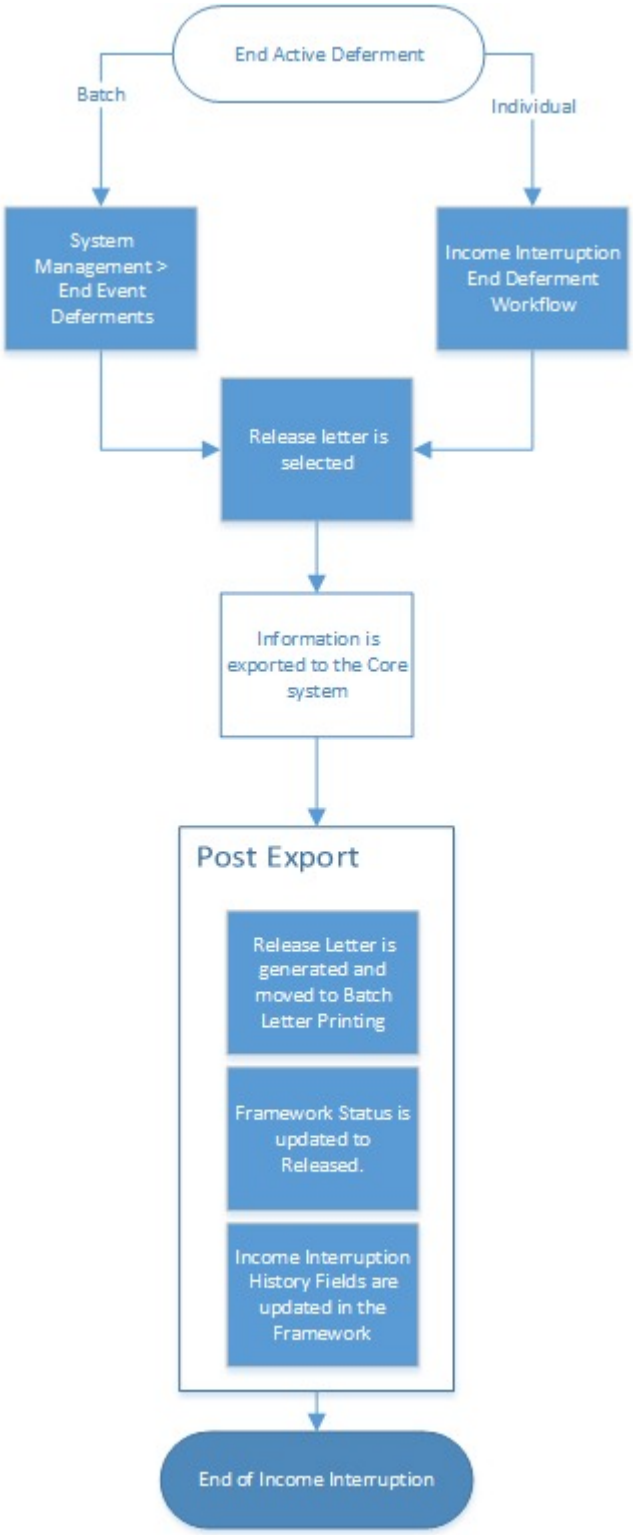
Field Name	Location
Account Number	Account > Income Interruption History > Account Number
Decision Date	Account > Income Interruption History > Decision Date
Decision Letter	Account > Income Interruption History > Decision Letter
Decision Reason	Account > Income Interruption History > Decision Reason

Decision User	Account > Income Interruption History > Decision User ID
End Date	Account > Income Interruption History > End Date
Ending Balance	Account > Income Interruption History > Ending Balance
Ending DQ Amount	Account > Income Interruption History > Ending DQ Amount
Event Code	Account > Income Interruption History > Event Code
Import Date	Account > Income Interruption History > Import Date
Release Date	Account > Income Interruption History > Release Date
Release Letter	Account > Income Interruption History > Release Letter
Release Letter Date	Account > Income Interruption History > Release Letter Date
Release Type	Account > Income Interruption History > Release Letter Type
Source Code	Account > Income Interruption History > Source Code
Starting DQ Amount	Account > Income Interruption History > Starting DQ Amount
Starting Balance	Account > Income Interruption History > Starting Balance

Ending a Deferment

A deferment event can be terminated individually through execution of the Income Interruption workflow step or as a batch from the End Event Deferments page in System Management.

The diagram below provides an overview of the Income Interruption End Deferment process in Temenos Infinity:



At the end of a deferment period, the status is updated from Active to Released for the terminated accounts and a file containing those accounts is exported to the core system in order for institutions to reinstitute the accounts' regular payment schedule.

After an Income Interruption status is set to Released, a letter is generated for all applicable accounts and the following fields are updated within Temenos Infinity:

- Ending Balance
- Ending DQ Amount

- End Date
- Release Type
- Release Letter Date
- Release Letter ID
- Status

> When a deferment is terminated through execution of the Income Interruption End Deferment workflow step, the Release Type is updated to **Individual**. The Release Type is updated to **Batch** for deferments terminated through the End Event Deferments page in System Management.

Export of Information

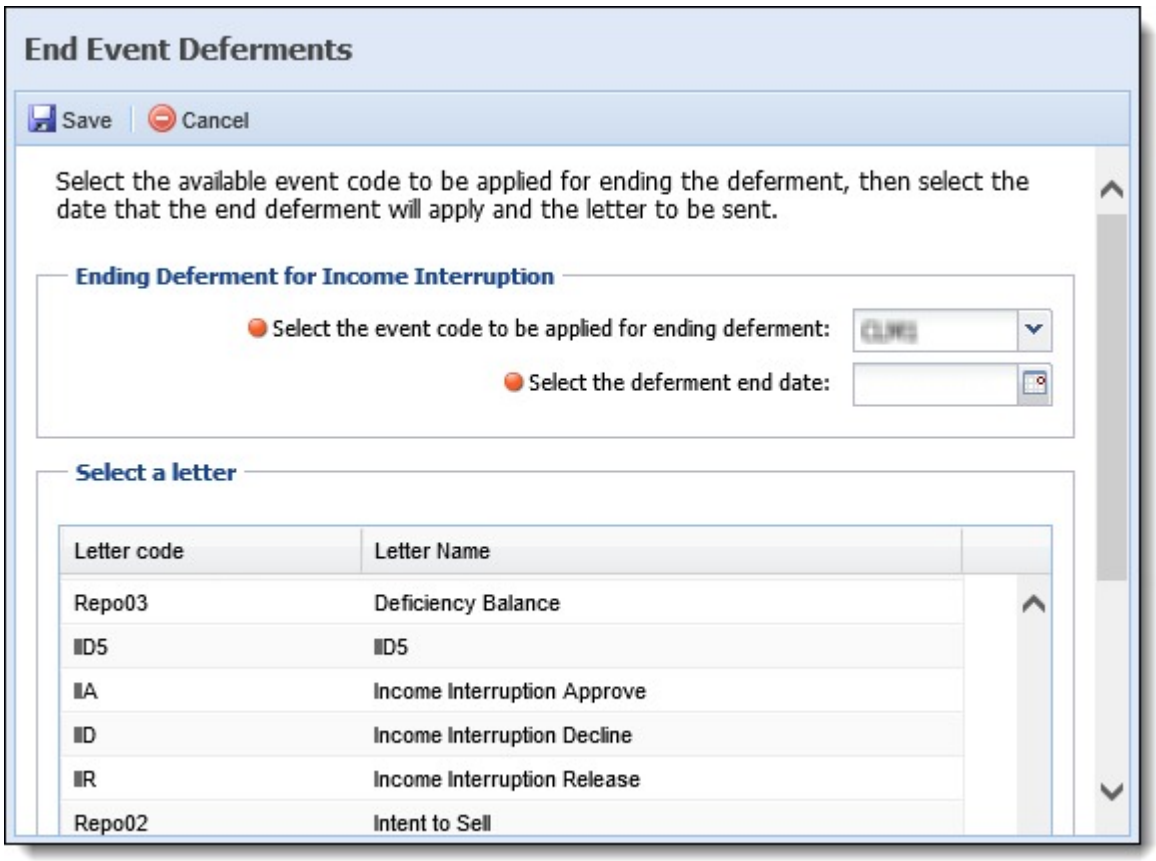
> To enable and configure the Income Interruption Export for your institution, please contact a Temenos Customer Care Representative.

Income Interruption accounts are exported in a single-column file containing the following field:

- Account Identifier

End Event Deferments

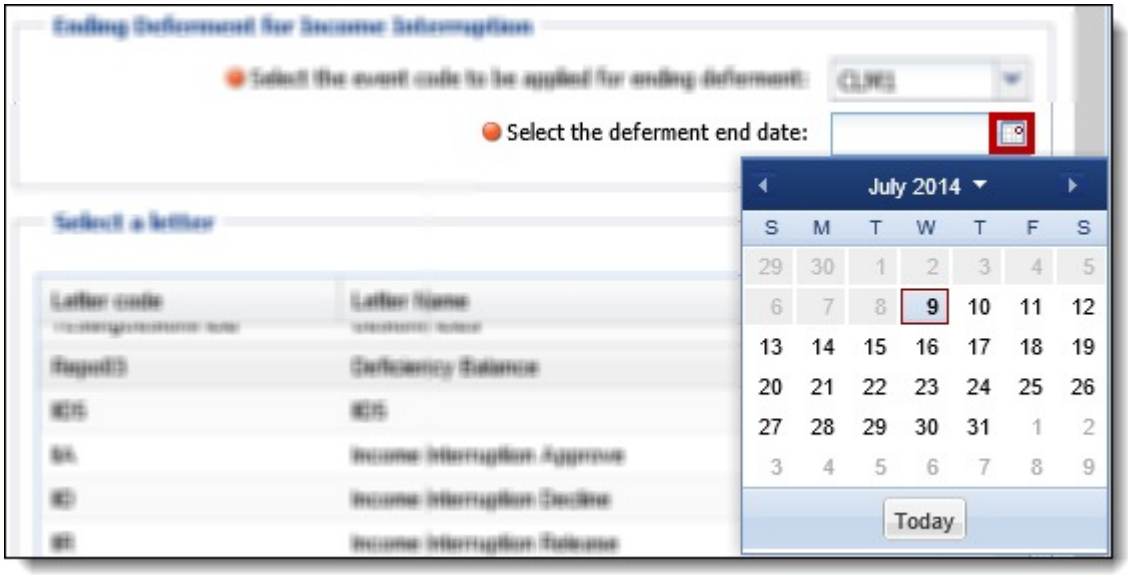
System administrators can end a deferment period for accounts associated to a specific event code from the End Event Deferments page in System Management > End Event Deferments.



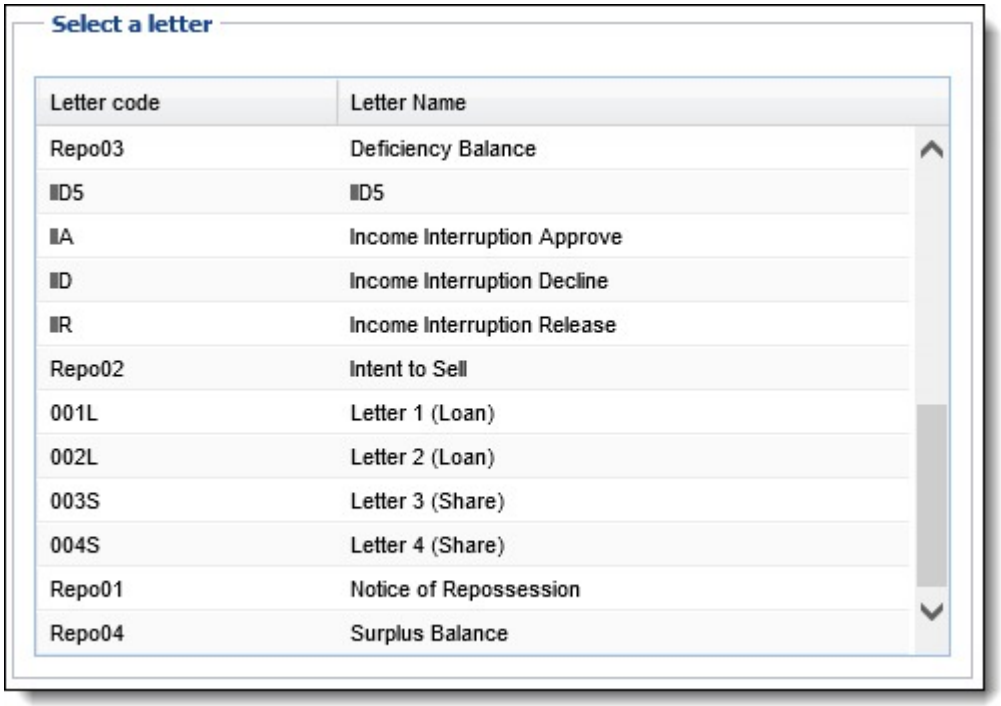
Creating an End Event Deferment

To assign a deferment end date for a specific event, select an event code from the drop-down that displays in the **Ending Deferment for Income Interruption** section.

Once an event code is identified, select an end date for the deferment by clicking the calendar icon:

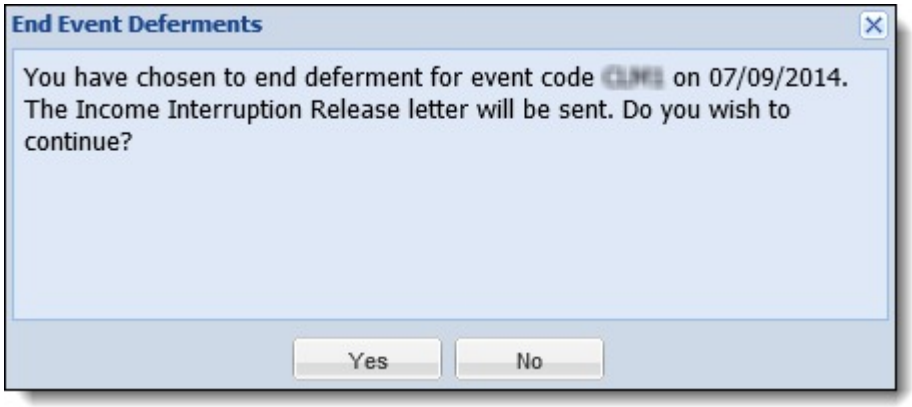


Within the **Select a Letter** section, assign a letter to be sent to the account holder regarding the end of their deferment. Click to highlight the letter within the grid.



> The letters within this section are configured by the system administrator in System Management > Communication > Letters & Forms.

Once all fields are complete, click **Save** to retain the deferment information. A confirmation message appears summarizing the selections that were made on the page. Click **Yes** to end deferment for the specified event or click **No** to return to the End Event Deferments page without ending the deferment.



Once the deferment information is saved, a success message appears to confirm the save was successful. Click **OK** to return to the End Event Deferments Page.

Upon the end of a deferment period, the following fields are updated in Temenos Infinity:

- End Date
- Ending Balance
- Ending DQ Amount
- Release Type
- Status

> When an Income Interruption is ended through the End Event Deferments page, the Release Type is updated to **BATCH.**

The status is updated from Active to Released for the terminated accounts. With the Income Interruption Export, a file containing those accounts is exported to the core system in order for institutions to reinstitute the accounts' regular payment schedule.

After executing the Income Interruption Export, the assigned letter is generated and moved to the Batch Letter Printing area.

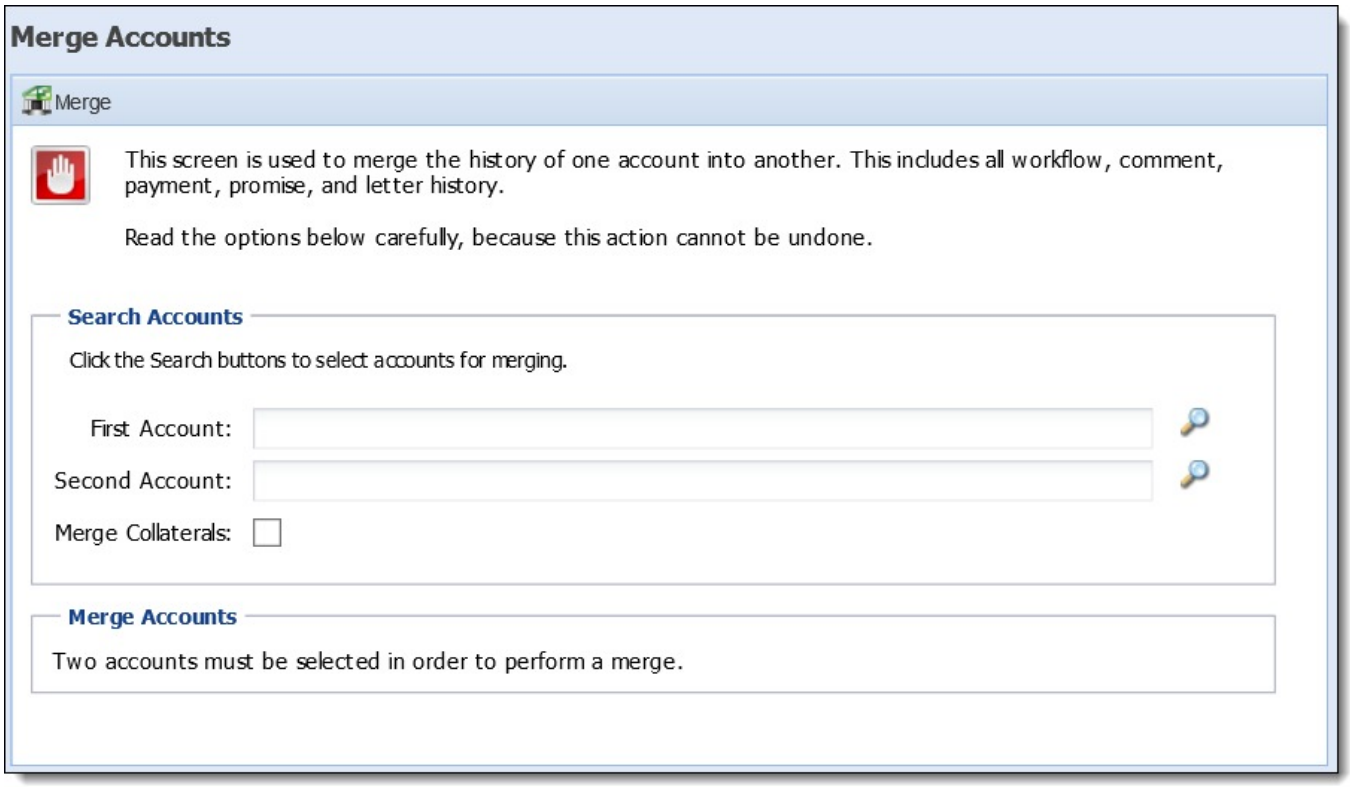
For additional information on Batch Letter Printing, click here.

To learn more about the Income Interruption process, please see the Income Interruption Overview topic within this guide.

Merge Accounts

The Merge Accounts page in System Management (System Management > Merge Accounts) provides the ability to merge the history of one account into another. This includes all workflow, comment, payment, promise, and letter history.

> Prior to Merging Accounts, ensure that all of the information is correct as this action cannot be undone.



Merging an Account

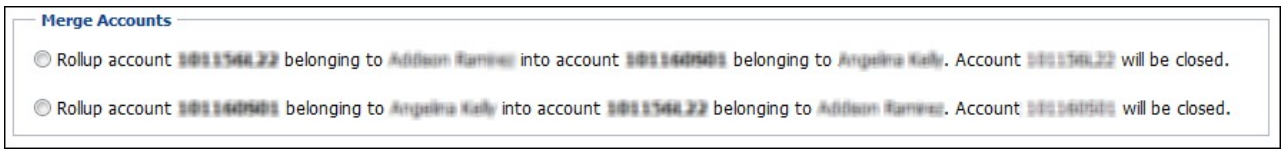
- In the **Search Accounts** section of the Merge Accounts page, click in the First Account row to open the Search function.
- Search for the first account that is to be merged. Double-click the account to populate it in the First Account field.

> Upon accessing the Search window, the Persons radio button is selected by default. Select the **Accounts** radio button to ensure Merge Accounts functionality works correctly. If Accounts is not selected, the account number does not populate in the Merge Accounts page and an error may be returned when a search result is selected. For more information on the Search function, see the End User Guide.

- Click in the Second Account row to open the Search function and search for the second account, using the same method as described in the previous step.
- If desired, select the Merge Collaterals check box to determine whether or not collateral from both accounts is merged to the primary account (merged to account). When the Merge Collateral check box is selected, the collateral from both accounts is populated in the collateral information for the primary account. When the

the Merge Collateral check box is blank, the collateral from the secondary account (merged from account) is not merged to the primary account; the collateral from the primary account remains on the primary account, and the collateral from the secondary account remains on the secondary account.

- Once the First and Second Account fields are populated, the Merge Accounts section populates with two options. Read each option carefully, and select which account to keep open and merge accounts into, and which account to close.



- Click **Merge**. A confirmation message appears. Click **Yes** to merge the accounts. Click **No** to not merge the accounts and return to the Merge Accounts page.
- After clicking **Yes**, a success message appears showing the accounts were successfully merged.

> The Account Merge details appear in the Workflow History screen of the account to which the records the merged.

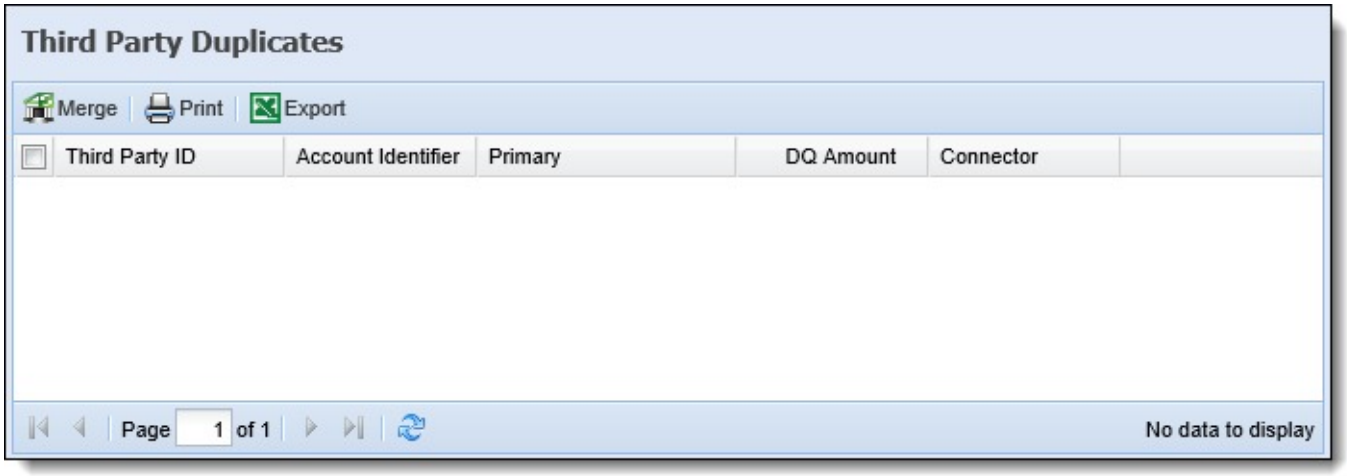
> - The status for the account merged into the other account is set to Closed. The account is not archived.
> - If an account is delinquent and merged into another account, it is closed but, the delinquent values are not removed. The account still fall appears in queues, reports, etc. unless the criteria contains "Closed Flag = 0," "Delinquent Flag = 1," or the delinquent values are manually removed from the account.

Third Party Batch Imports

Third Party Duplicates

The Third Party Duplicates page in System Management (System Management >Third Party Duplicates) displays any accounts imported from a third party that match multiple accounts with the same Third Party ID. For example, a third party may send over an account with the account number 12345. If there are two accounts in the database that have the same Third Party ID associated to that account number, both accounts display on this page.

From this page, administrators can Merge accounts, print the page, and export the page to an Excel spreadsheet.



The following columns display within this page:

Column Name	Description
Third Party ID	Displays the account's Third Party ID.
Account Identifier	Displays the Account Identifier of the account listed.
Primary	Displays the name of the Primary on the account.
DQ Amount	Displays the DQ Amount on the account.
Connector	Displays the name of the connecter that sent the account into Temenos Infinity.

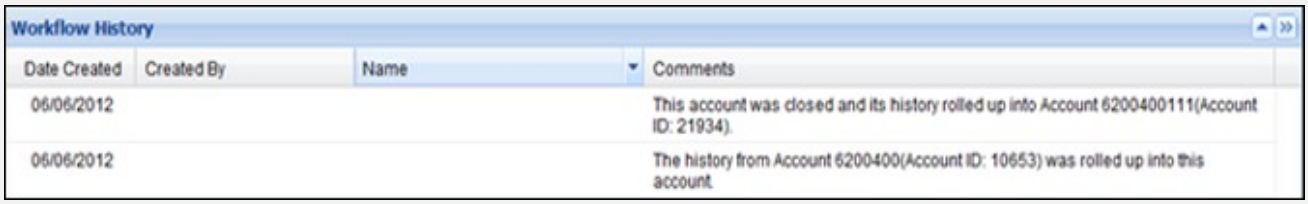
To Merge Accounts:

Prior to Merging Accounts, ensure that all the information is correct as this action cannot be undone.

- Select the accounts from the list that are to be merged.
- Click **Merge**. A confirmation message appears. Click **Yes** to merge the accounts. Click **No** to cancel merging the accounts and return to the Third Party Duplicates page.
- After clicking Yes, a success message appears showing the accounts were successfully merged.

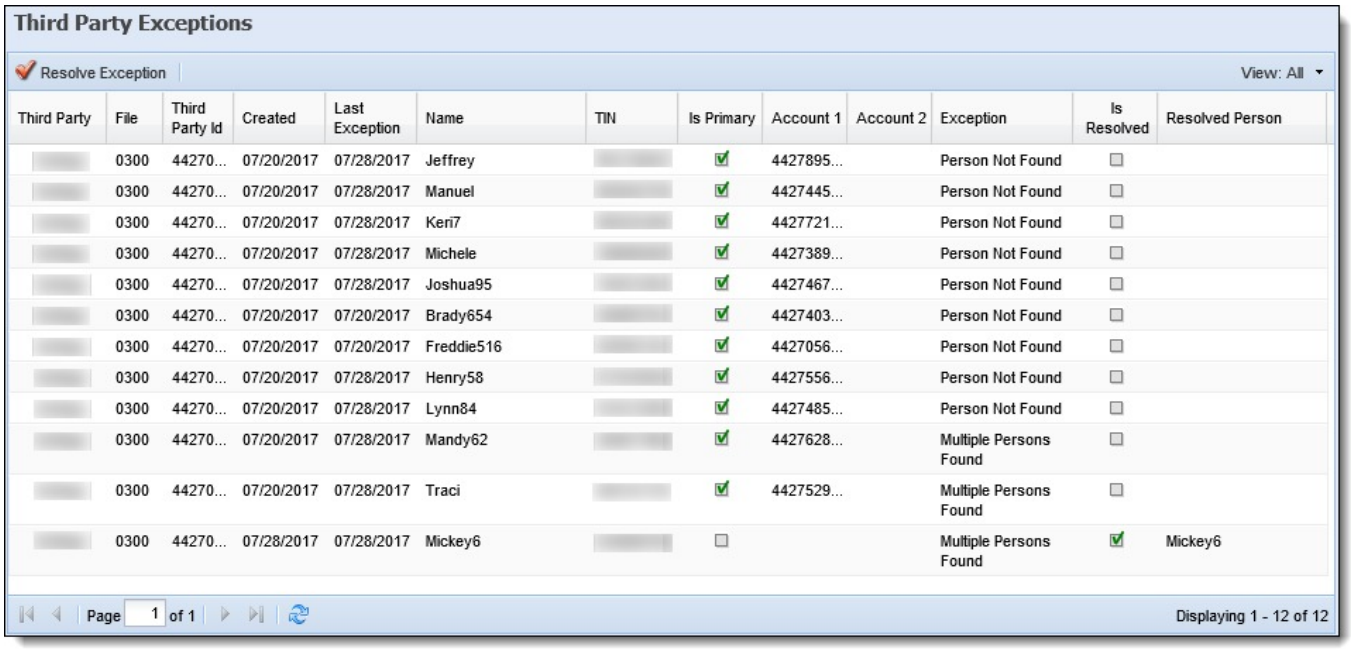
The Account Merge details appear in the Workflow History screen of the account into which they were merged.

- The account that was merged into the other account is then moved to a Closed status.
- If an account is delinquent and merged into another account, it is closed but the delinquent values are not removed. The account will still fall into queues, reports, etc. unless the criteria contains "Closed Flag = 0," "Delinquent Flag = 1" or the delinquent values are manually removed from the account.



Third Party Exceptions

The Third Party Exceptions page in System Management (System Management >Third Party Exceptions) displays accounts from third party interfaces such as PSCU, FICS, and Certegy that could not be imported into Temenos Infinity for various reasons. Exceptions must be resolved for all third party accounts to be imported into Temenos Infinity. From this page, administrators can review and resolve exceptions.



Third Party Exceptions

Resolve Exception | View: All

Third Party	File	Third Party Id	Created	Last Exception	Name	TIN	Is Primary	Account 1	Account 2	Exception	Is Resolved	Resolved Person
	0300	44270...	07/20/2017	07/28/2017	Jeffrey		☑	4427895...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Manuel		☑	4427445...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Keri7		☑	4427721...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Michele		☑	4427389...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Joshua95		☑	4427467...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/20/2017	Brady654		☑	4427403...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/20/2017	Freddie516		☑	4427056...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Henry58		☑	4427556...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Lynn84		☑	4427485...		Person Not Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Mandy62		☑	4427628...		Multiple Persons Found	☐	
	0300	44270...	07/20/2017	07/28/2017	Traci		☑	4427529...		Multiple Persons Found	☐	
	0300	44270...	07/28/2017	07/28/2017	Mickey6		☐			Multiple Persons Found	☑	Mickey6

Page 1 of 1 | Displaying 1 - 12 of 12

The following columns display on this page:

Column Name	Description
Third Party	The third party interface in which the exception was generated.
File	If the interface includes more than one file, the name of the file is indicated here. If only one file exists this column is blank.
Third Party Id	Displays the account's Third Party Id.
Created	The date the exception was created.
Last Exception	If the same exception is encountered again, the Last Exception date is updated with the date of the new, most recent exception.
Name	Displays the name of the account holder associated to the exception.
TIN	Displays the TIN of the account holder associated to the exception.
Is Primary	Displays a ☑ to identify the person as the primary owner of the account. A blank check box displays if the person is the secondary owner.
Account 1	Displays the specific account number included in the third party file.
Account 2	Displays an additional account number included in the third party file.
Exception	Displays the type of exception. The five types of exceptions are defined below.
Is Resolved	If checked, the exception is resolved.
Resolved Person	If the exception is resolved and a new account holder was selected for the account, their name is displayed.

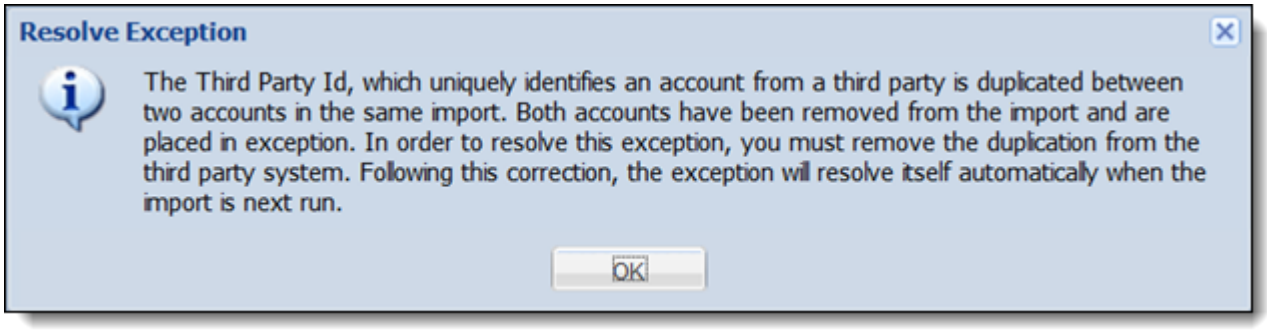
By default, all exceptions are displayed in the grid; however, the records can be filtered. Click the **View** drop down above the list area. All exceptions, resolved exceptions or unresolved exceptions can be displayed.

Exception Types

There are five types of exceptions that can appear on this page.

Duplicate Id

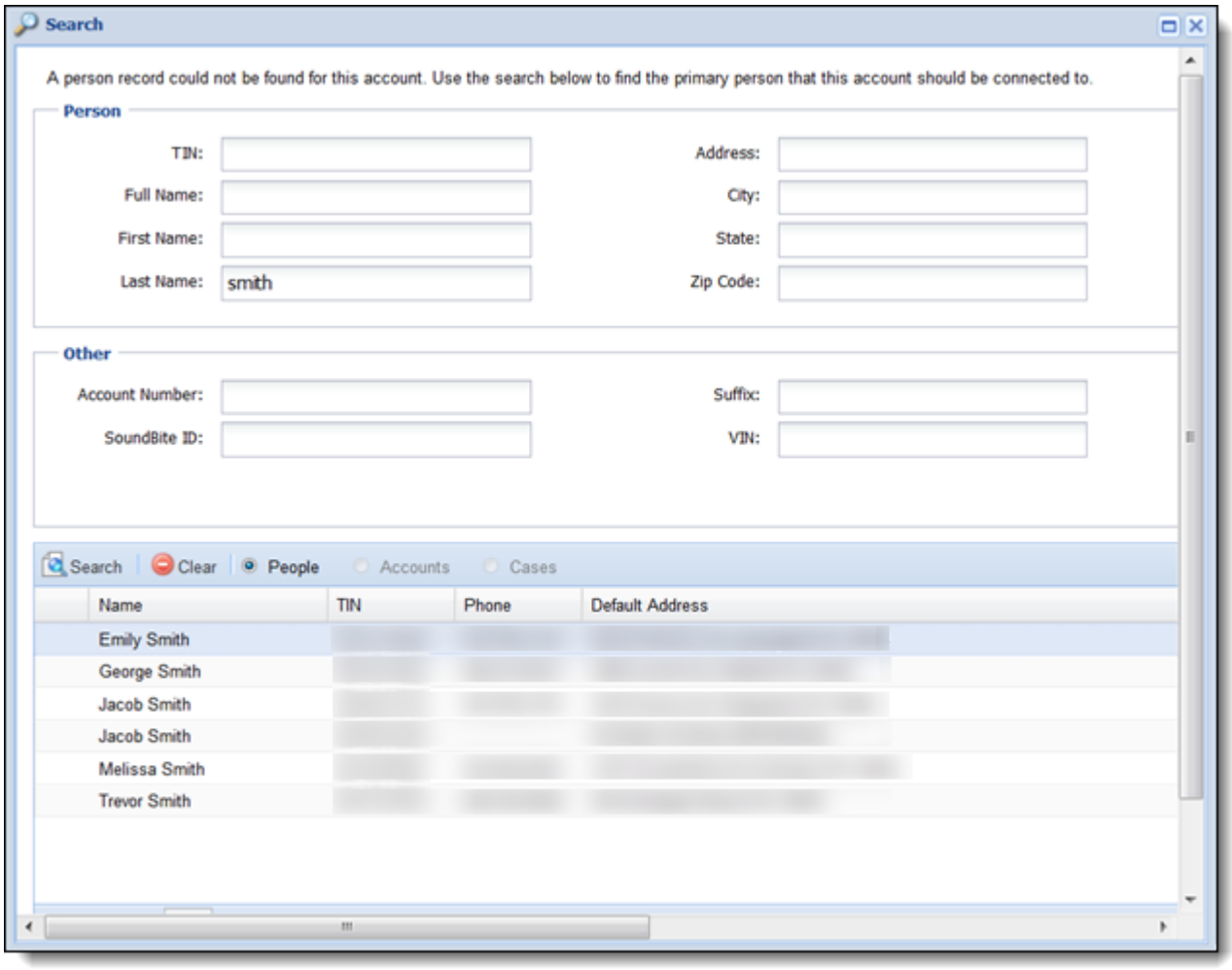
The Duplicate Id exception occurs when a Third Party Id is duplicated between two accounts in the same third party import. If this exception appears, steps need to be taken outside of Temenos Infinity to resolve. Highlighting the exception and clicking **Resolve Exception** displays a message containing directions to resolve the exception.



Clicking **OK** does not resolve the exception; it stays unresolved until the duplication is removed from the third party system and a new third party import is run.

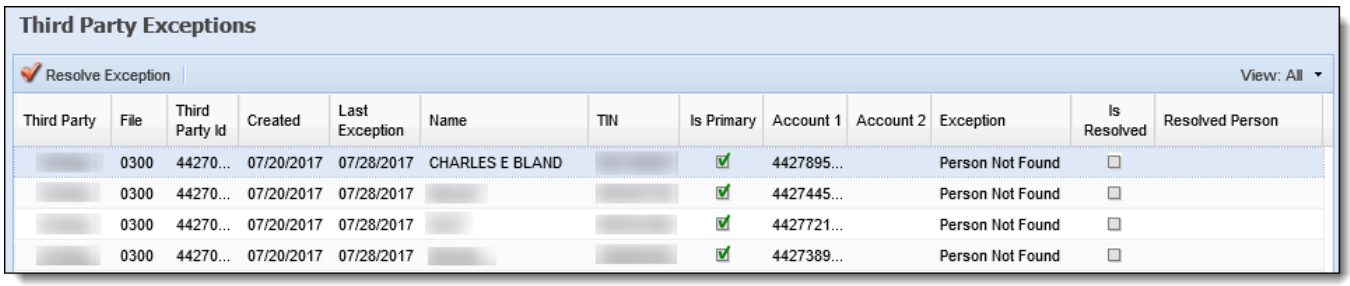
Person Not Found

The Person Not Found exception occurs when a person record cannot be found in Temenos Infinity. A person is required for an account to be imported from a third party. Highlighting the exception and clicking **Resolve Exception** opens the search function to allow administrators to search for the primary person to which the account should be connected. Enter any criteria and click **Search**.

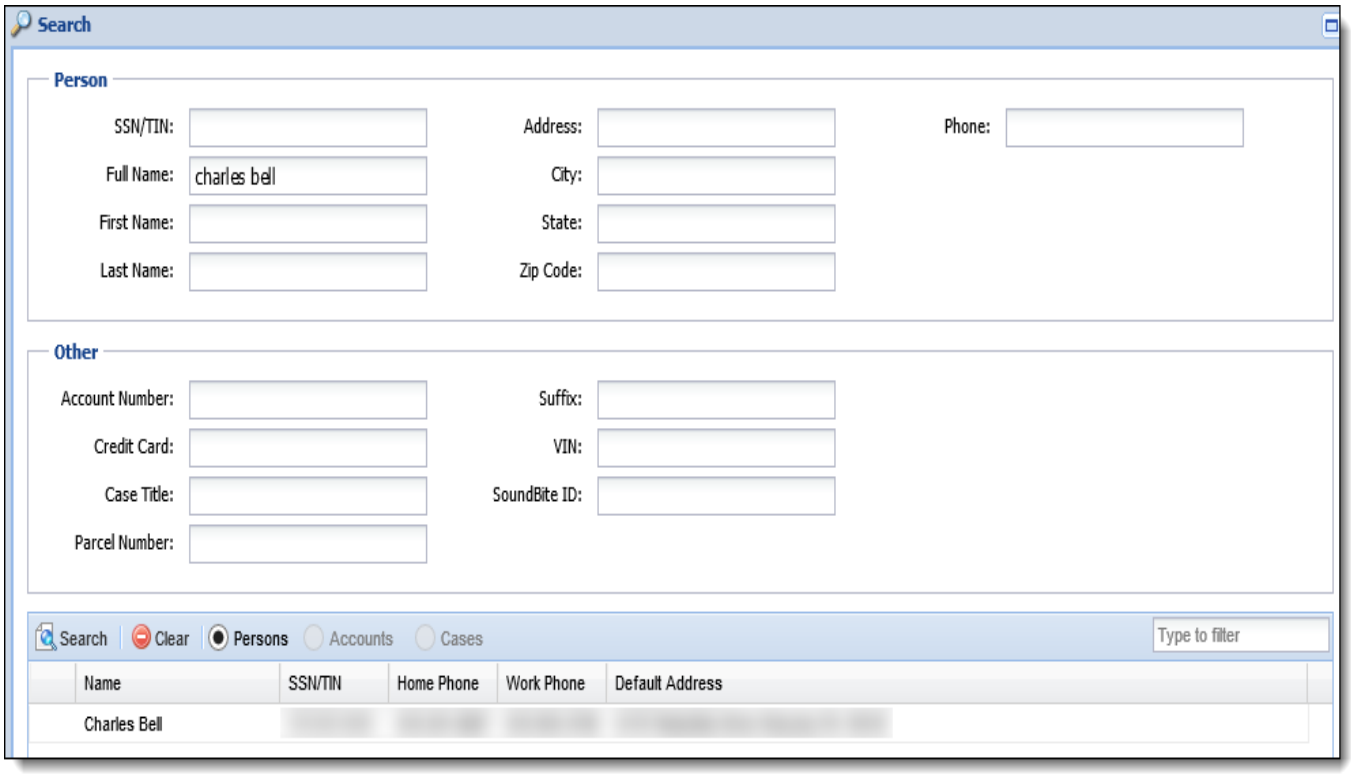


When the results display, double-click the desired result to select the person to relate the account to. The selected person's name appears as the Resolved Person on the Third Party Exceptions page, but accounts are not updated until a new third party import is ran.

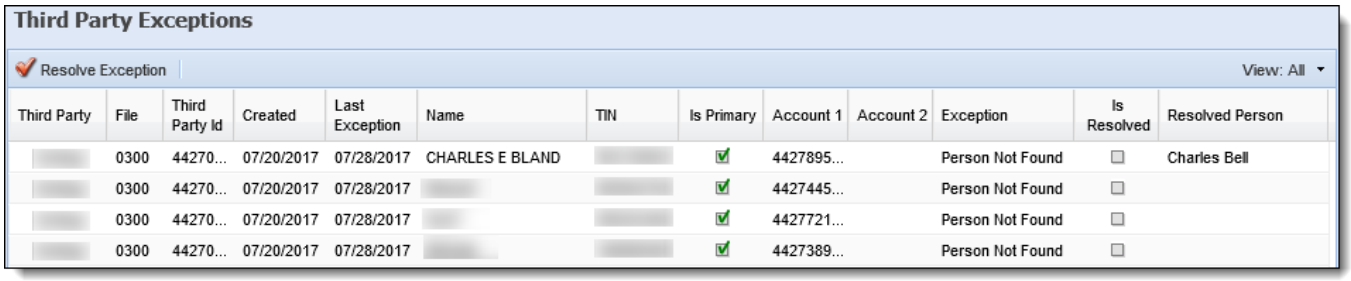
In the following example, Charles E. Bland was included in the file imported from a third party, but he is not in Temenos Infinity. AThe administrator selects Charles' exception from the list.



A screen displays to search for the correct person record. Since the administrator knows the account belongs to Charles Bell, he enters Charles Bell in the Full Name field and clicks **Search.** The record for Charles Bell appears in the search results.



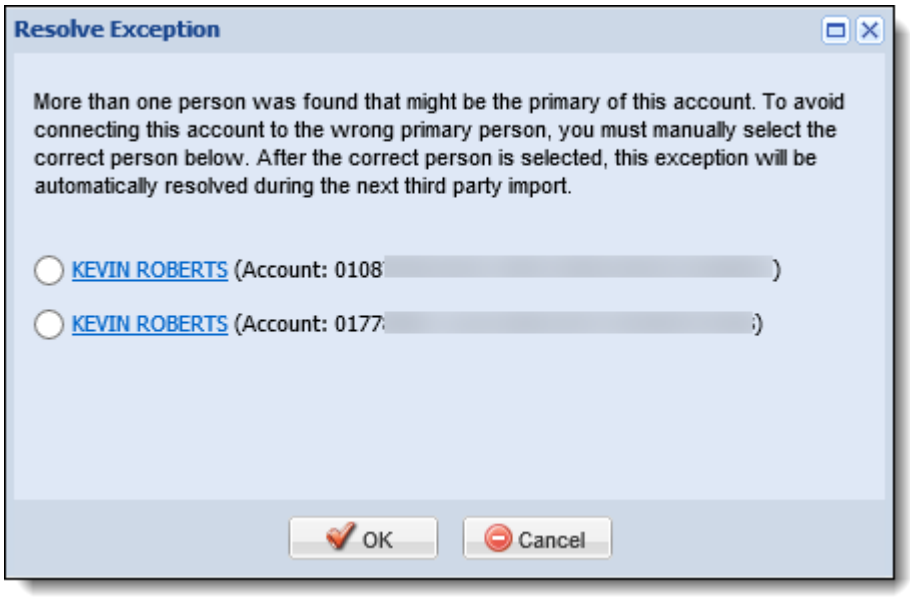
The administrator double-clicks the record for Charles Bell. The Search window closes, and Charles Bell appears as the Resolved Person on Charles Bland's third party import record. Next time the third party import runs, the account displays Charles Bell as the primary person.



Multiple Persons Found

The Multiple Persons Found exception occurs when more than one primary person was found in Temenos Infinity for an account based on the person linking defined on the third party connector page in System Management. Highlighting the exception and clicking **Resolve Exception** displays a message allowing the administrator to manually select the correct person for the account.

> The Source Identifier is displayed in parenthesis behind each person's name to allow for easier selection of the correct person.



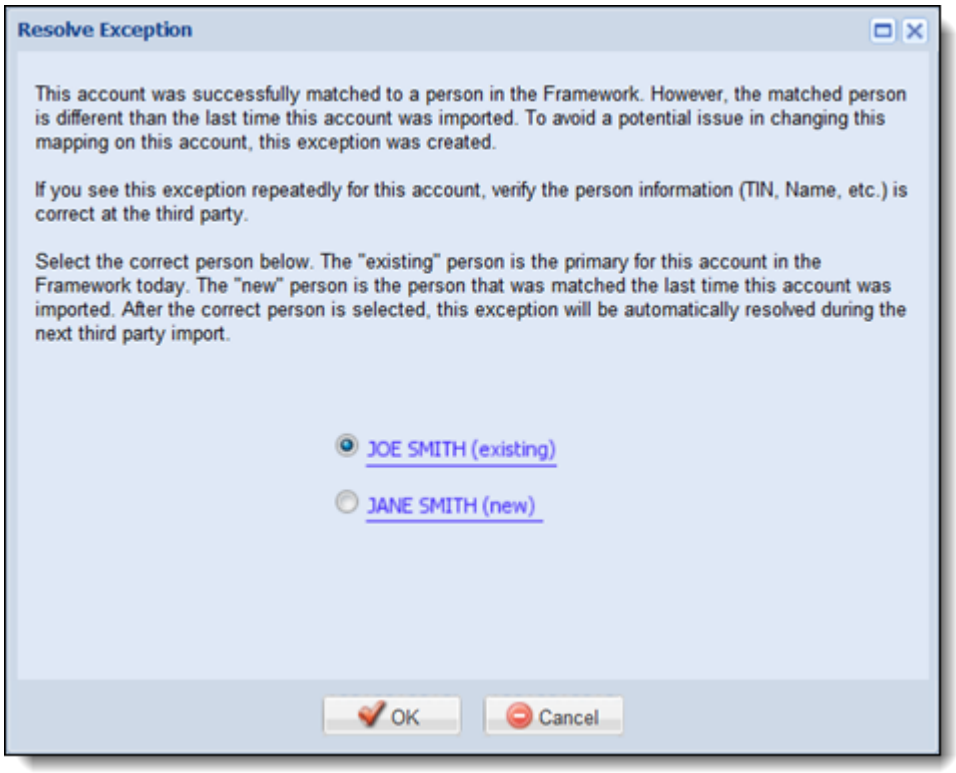
For example, a third party account is imported into Temenos Infinity with an SSN of 123456789. In Temenos Infinity, there already exists three persons with an SSN of 123456789. The three existing persons are displayed in the Resolve Exception message for the administrator to select.

The persons display as hyperlinks that, when clicked, navigate the administrator to that person's workspace for further investigation. Select the correct person using the radio button and click **OK**. The selected persons name appears as the Resolved Person on the Third Party exceptions page, but the account is not updated until a new third party import is ran.

Person Conflict

The Person Conflict exception occurs when an account is successfully matched to a person in Temenos Infinity, but the matched person is different than the last time the account was imported from the third party. For example, a third party account is imported into Temenos Infinity with an SSN of 123456789, and it matches a person in the system. The next day, the same account is imported but the SSN is 987654321. A new person is found but the system realizes that the account is moving from person A to person B, so this exception occurs. If this exception occurs repeatedly for the account, verify the person information (TIN, Name, etc.) is correct on the account at the third party so it can be consistently matched correctly.

Highlighting the exception and clicking **Resolve Exception** displays a message that allows the administrator to manually select the correct person for the account.



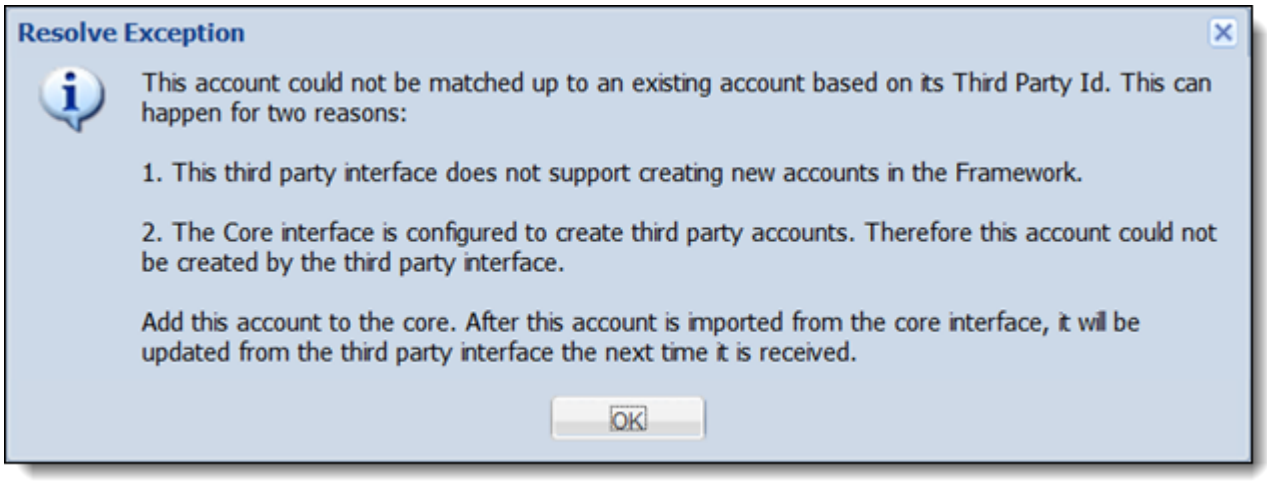
The “existing” and “new” persons display as hyperlinks that, when clicked, navigate the administrator to that person’s workspace for further investigation. The "existing" person is the current primary on the account in Temenos Infinity. The "new" person is the person that was a match the last time the account was imported from the third party. Select the correct person using the radio button and click **OK**. The selected persons name appears as the Resolved Person on the Third Party exceptions page, but the account is not updated until a new third party import is run.

Account Not Found

The Account Not Found exception occurs when the account cannot be matched to an existing account based on its Third Party Id. This can happen for two reasons:

- The third party interface does not support creating new accounts in Temenos Infinity.
- The Core interface is configured to create third party accounts, therefore this account cannot be the third party interface.

Highlighting the exception and clicking **Resolve Exception** displays a message indicating that the administrator must add the account to the core system.



After the account is imported from the core system, it is then updated in Temenos Infinity via the third party interface.

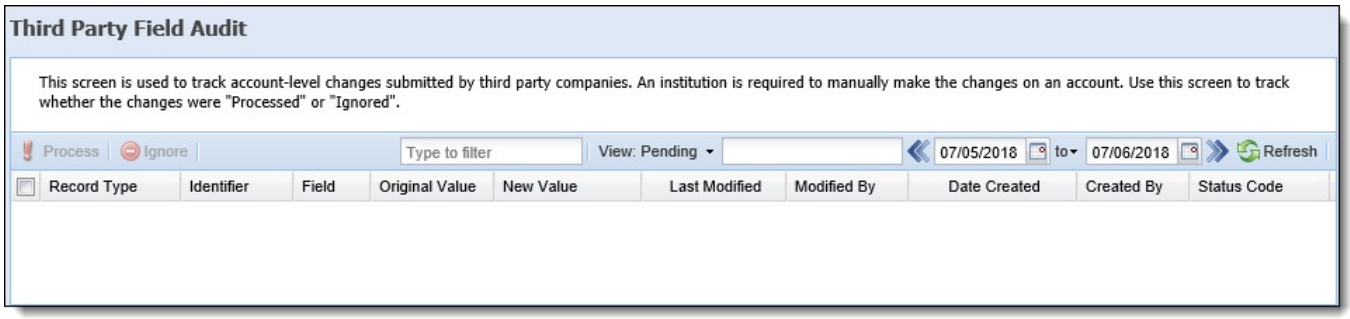
> Clicking OK on this message closes the window but does not resolve the exception. The exception is resolved when it is added to the core interface.

Resolving an Exception

To resolve an exception, highlight the exception, click **Resolve Exception** and follow the above instructions. The exception is marked as resolved and a Resolved Person is listed on the Third Party exceptions page, but the account is not updated until the next third party import occurs. After an import, the exceptions for an account are deleted from this page.

Third Party Field Audit

The Third Party Field Audit page in System Management (System Management >Third Party Field Audit) is used to track account-level changes submitted by third party companies. After a third party makes the change, the institution is required to manually make the changes on the account. Use this screen to track whether the changes are "Processed" or "Ignored." Within the toolbar above the grid area, users can Process changes, Ignore changes, filter the results, change the view, and set the date range of the list.



The following columns display in this page:

Column Name	Description
Record Type	The record type associated to the change.
Identifier	The account identifier associated to the change.
Field	The field on the account that is being updated.

Original Value	The original value of the field the third party would like to update.
New Value	The new value of the field the third party would like to update.
Last Modified	Denotes when the last modification was made to the field audit.
Modifed By	Denotes who made the last modification to the field audit.
Date Created	Denotes when the field audit was created by the third party.
Created By	Denotes the source of the field audit.
Status Code	Displays the status of the field audit (Pending, Processed, Ignored).

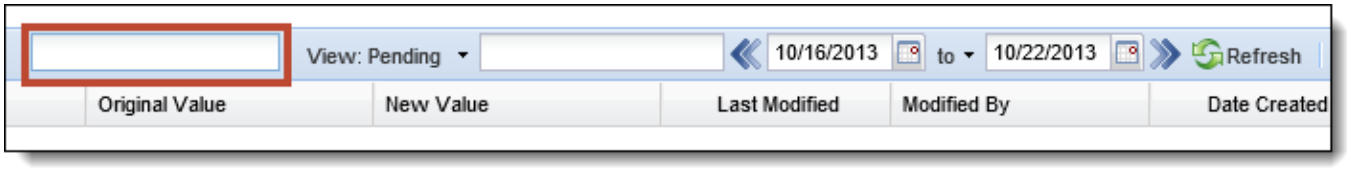
Double-click a row in the grid to display the record in the workspace.

To Process/Ignore a Change:

- After manually making the changes to the fields as shown in the list, highlight the items that are to be processed and click either **Process** or **Ignore**.
- A success message appears indicating the field processed successfully. The status of the field changes in the grid based on the option that was selected.

To Filter Results:

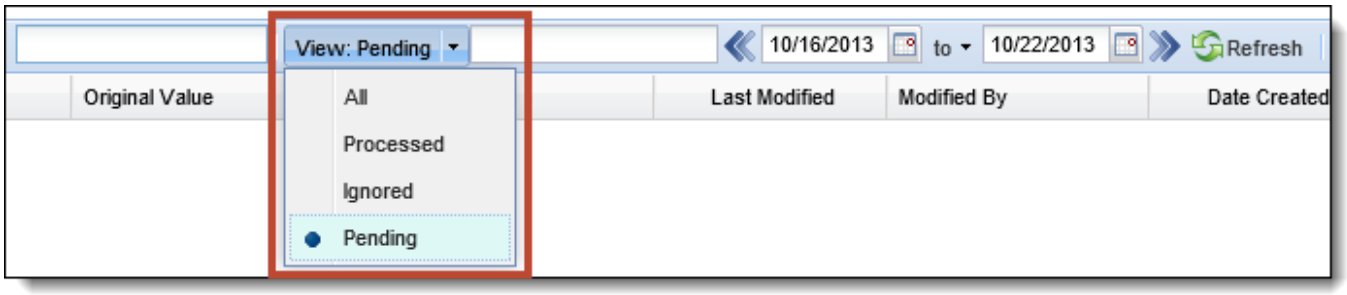
- Enter the text to filter by in the filter box.



- Click **Refresh**. The results are displayed in the grid.

To Change the View:

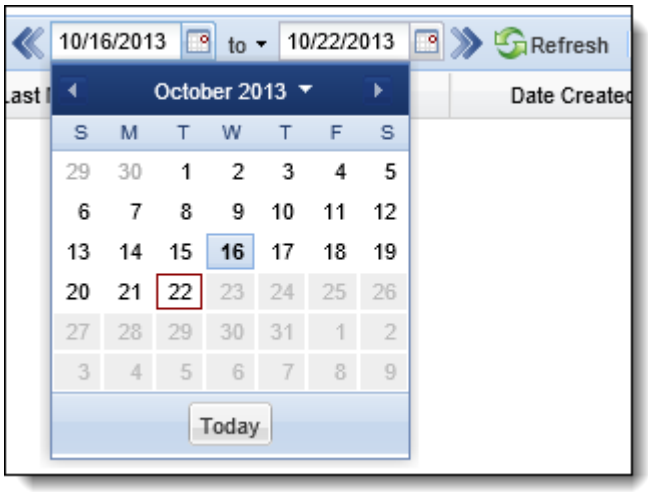
- Select either All, Processed, Ignored, or Pending from the View drop down to view accounts with those Status Codes.



- Click **Refresh**. The results are displayed in the grid.

To Set the Date Range:

- Select the desired start date and end date from the calendars.



- Click **Refresh**. The results are displayed in the grid.

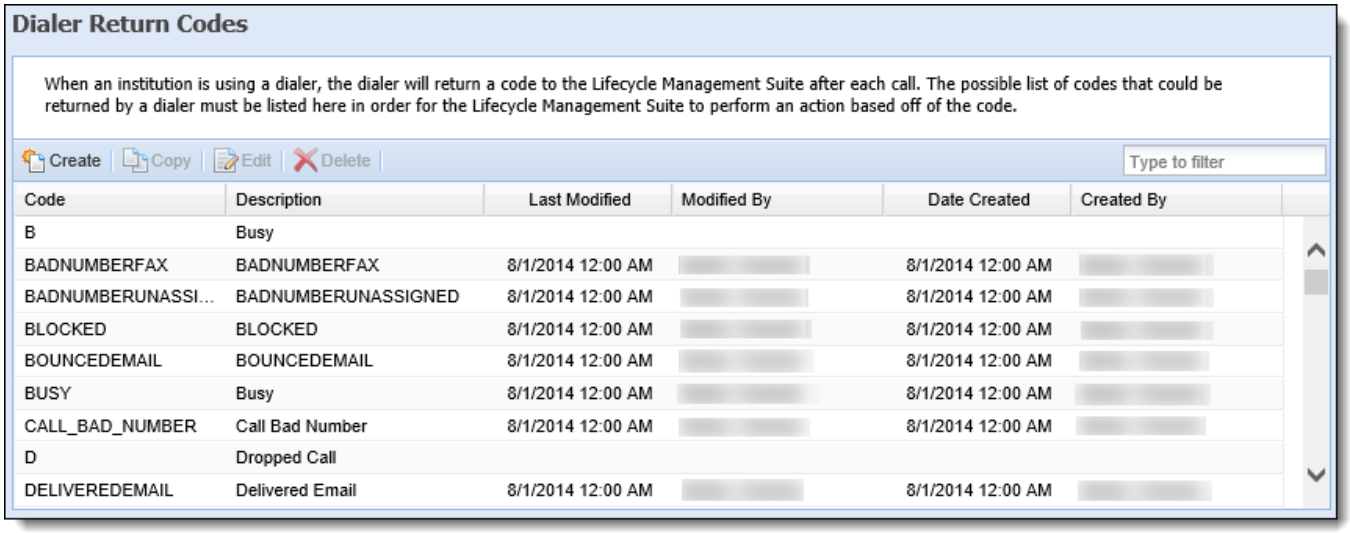
Dialers

Dialer Return Codes

When an institution is using a dialer, the dialer returns a code to Temenos Infinity after each call. The possible list of codes that could be returned by a dialer must be listed here in order for the system to perform an action based on the code.

The Dialer Return Codes page in System Management (System Management > Dialers > Dialer Return Codes) provides the ability to create and manage the dialer return codes available at an institution.

> While this topic has been updated to reflect the new Temenos Infinity branding, Lifecycle Management Suite will continue to appear in the instructions for this page until such a time that the branding can be updated.



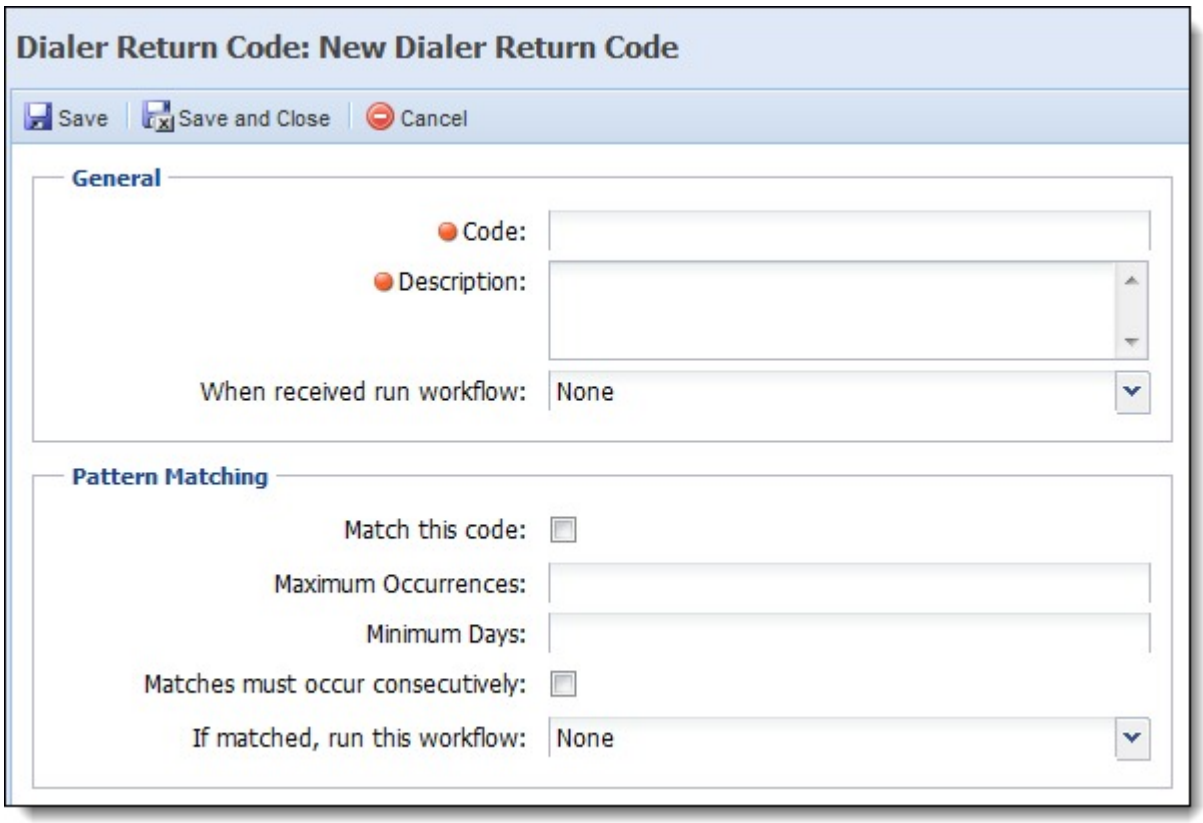
The following columns display in the Dialer Return Codes page:

Column Name	Description

Code	The code that is returned from a dialer must match a code displayed here.
Description	A description of the dialer code.
Last Modified	Denotes when the last modification was made to the dialer.
Modified By	Denotes who made the last modification to the dialer return code.
Date Created	Displays the date in which the dialer return code was created.
Created By	Displays the user that created the dialer return code.

Creating a Dialer Return Code

- Click **Create**. The New Dialer Return Code screen appears.



- Within the General section, enter in a code and a description for the dialer return code. The code must match the code that is coming over from the dialer.
- If necessary, select a workflow to run when the return code is triggered on the account/person.
- Within the Pattern Matching section, determine if the system should look for patterns within the results of dialer calls made on an account/person. The following fields display in this section:

> The DAYSOFFSET parameter in the database is used to adjust the current day value during the MATCHRELEASECODE process. For example, if set to 0, workflow execution and matching occurs on records from the current day. If set to -1, workflow execution and matching only occurs on records from the previous day.

Field	Description
Match this code	If selected, pattern matching is activated for the return code.
Maximum Occurrences	Enter the maximum number of times the code must be matched on an account.
Minimum Days	Enter the minimum number of days where the code is repeated.
Matches Must Occur Consecutively	If selected, the workflow is only run if the matches occur consecutively.
If matched, run this workflow	Select the workflow to be run if matches occur within the specified parameters. If using pattern matching, a workflow must be selected.

- When finished, click **Save** or **Save and Close** to save the new dialer return code and return to the Dialer Return Codes page. The new dialer return code populates in the list and can be mapped to the institution's dialer. Click Cancel to return without saving.

Copying a Dialer Return Code

- Click to highlight a dialer return code.
- Click **Copy**. The Copy Dialer Return Code screen appears.
- Make any required/necessary changes to the return code.
- When finished, click **Save** or **Save and Close** to save the new dialer return code and return to the Dialer Return Codes page. The new dialer return code populates in the list and can be mapped to the institution's dialer. Click **Cancel** to return without saving.

Editing a Dialer Return Code

- Click to highlight a dialer return code.
- Click **Edit**. The Edit Dialer Return Code screen appears.
- Make any necessary changes to the return code.
- When finished making changes, click **Save** or **Save and Close** to save the dialer return code and return to the Dialer Return Codes page. Click **Cancel** to return without saving.

Deleting a Dialer Return Code

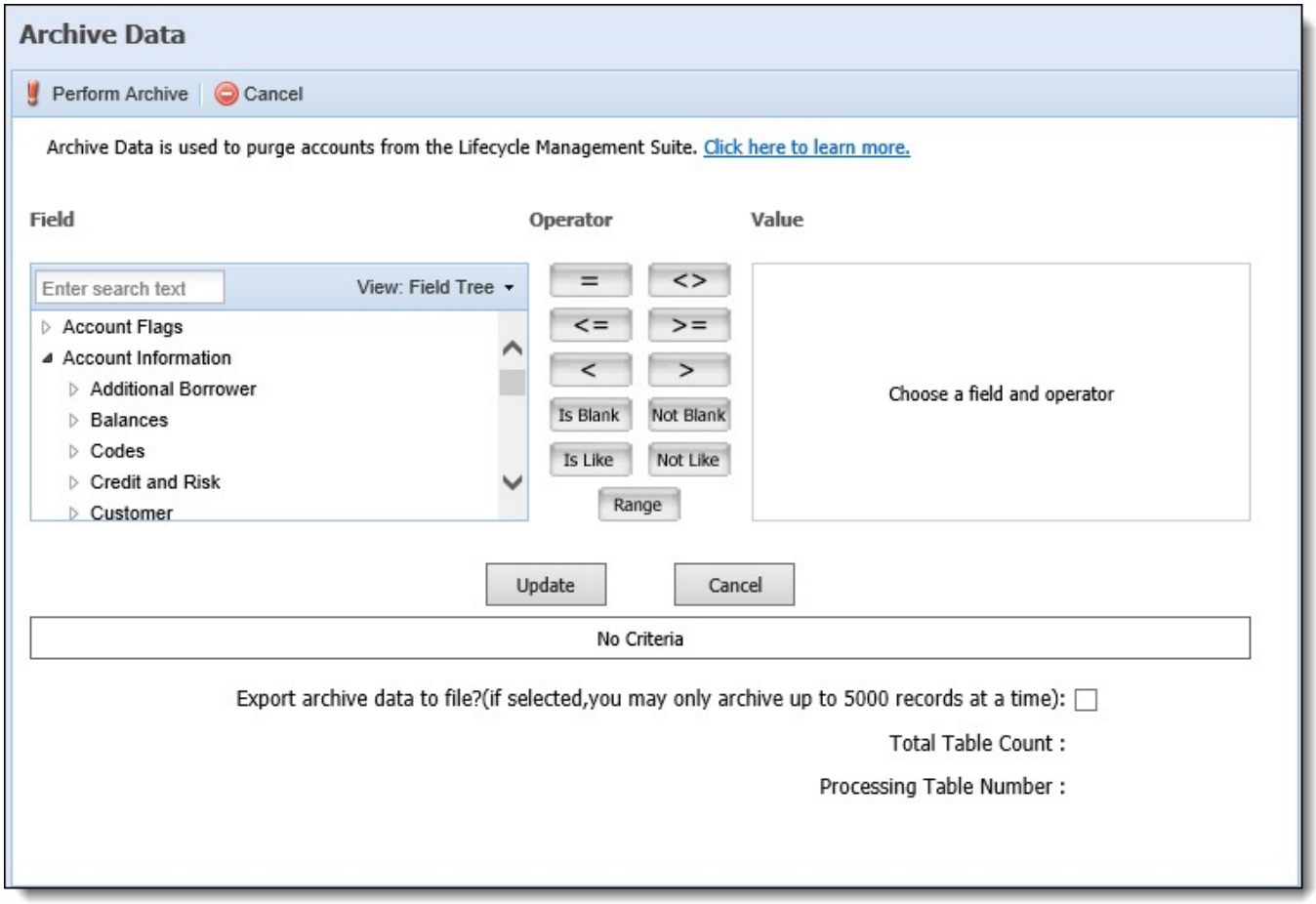
- Click to highlight a dialer return code.
- Click **Delete**.
- A confirmation message appears. Click **Yes** to delete the dialer return code. Click **No** to return to the Dialer Return Codes page without deleting.

Archive Data

Archive Data is used to purge accounts from Temenos Infinity. This removes the account and all related information such as Comments and Payment History. If all accounts for a person are archived, the entire person record is archived. Workflow data is archived if accounts and persons associated with the workflow are also being archived.

From this page in System Management (System Management > Archive Data), administrators can define the accounts to archive and perform the archive.

> This action cannot be undone. It is recommended that a View or Report is built prior to performing this function with criteria to review the accounts before they are removed.



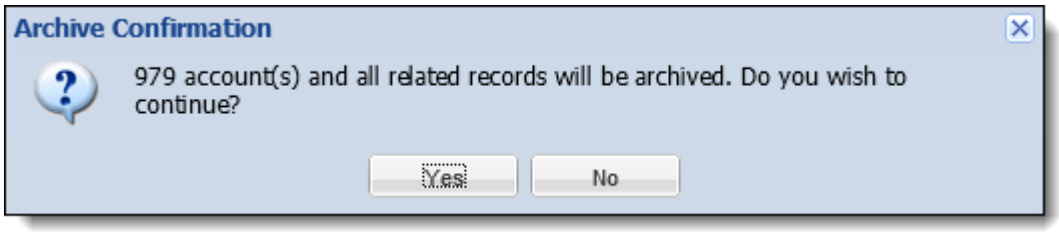
Use the Criteria Builder to define criteria for accounts that are to be archived.

> Refer to the Criteria Builder Help section for more information.

Select **Export archive data to file** to create a file containing the archived accounts. This file can be stored for future reference.

> Selecting Export archive data to file is optional.

Once the criteria has been defined, click Perform Archive. A confirmation message appears.



Click **Yes**. Another message displays stating the archive action is permanent and asks the administrator if they wish to continue. Click **Yes** to continue.

The archive process may take several minutes. As the archive is running, the Processing Table Number field on the Archive Data page is updated to provide a running count of the database tables that have been processed.

> The Total Table Count field displays the total database tables that require processing during the archive.

Once the archive has completed, a success message is displayed.

> If the account has not been closed on the host and is imported into Temenos Infinity again, it is treated as a new account. The purged data related to the account is not available.

Categories

This functionality is no longer used in Temenos Infinity, and will be removed from System Management in an upcoming product release.

Examples

The Examples section provides business cases, and more practical How To topics to help users understand Temenos Infinity features in a more depth way, and drive their business needs with examples provided by Temenos.

Batch Case Processing

Target Audiences

This example is helpful for system administrators.

Outcome

This example is to provide system administrators with a business case scenario of how Batch Case Processing functions within the Collection module, and the expected results when executing Batch Case Processing. At the end of this example, the system administrator should be able to understand why and when to use Batch Case Processing.

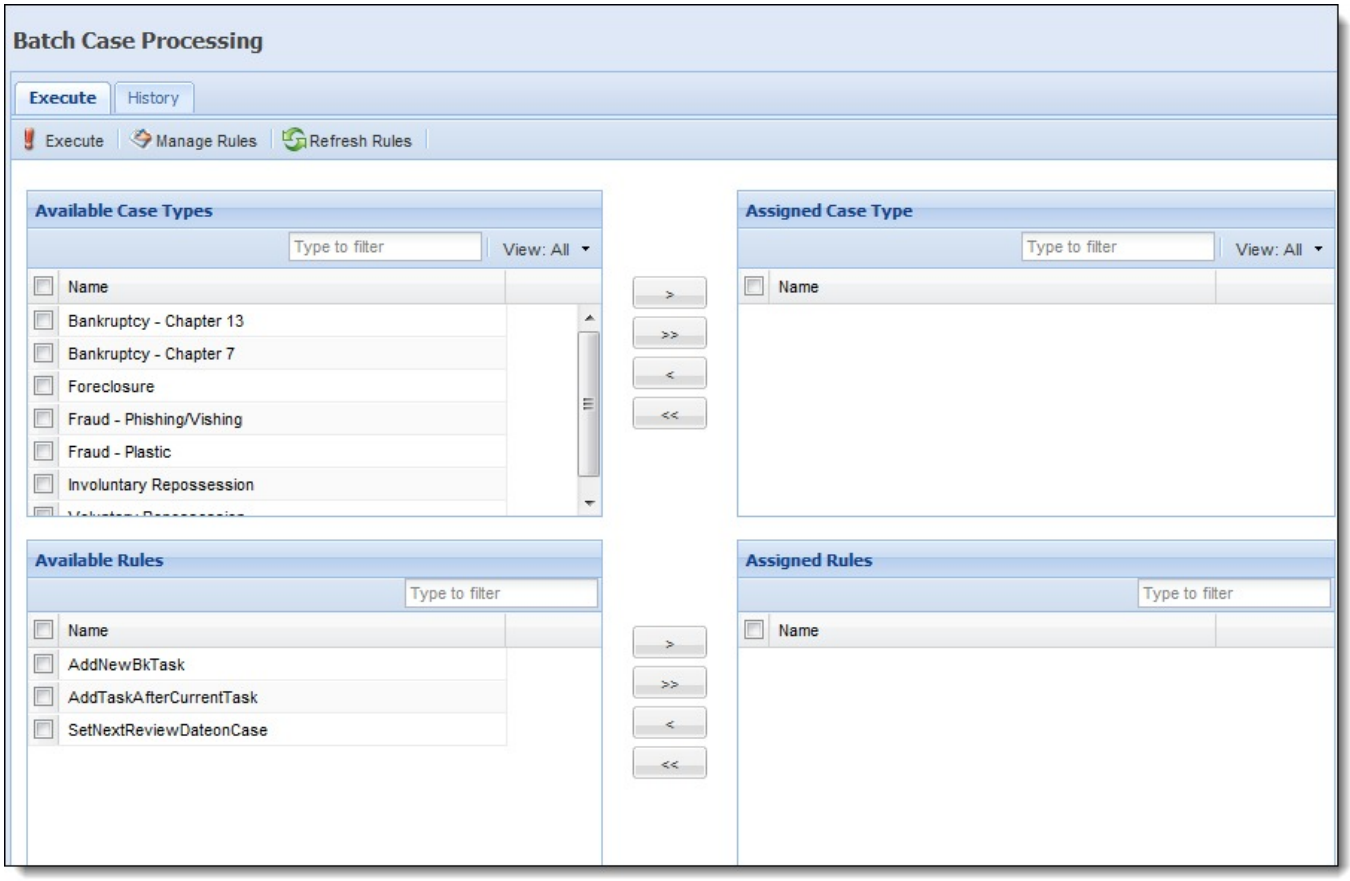
Steve uses Batch Case Functionality with Foreclosure Case Types

Steve is a Collections Manager at Temenos Credit Union. He was recently informed that a new state-wide regulation has been instituted pertaining to all types of foreclosure cases. Steve knows that there are several different foreclosure case types in Temenos Infinity that need an additional task template to satisfy the requirements of the new regulation. He realizes that the Batch Case Processing functionality in System Management can seamlessly add this task template to all foreclosure case types.

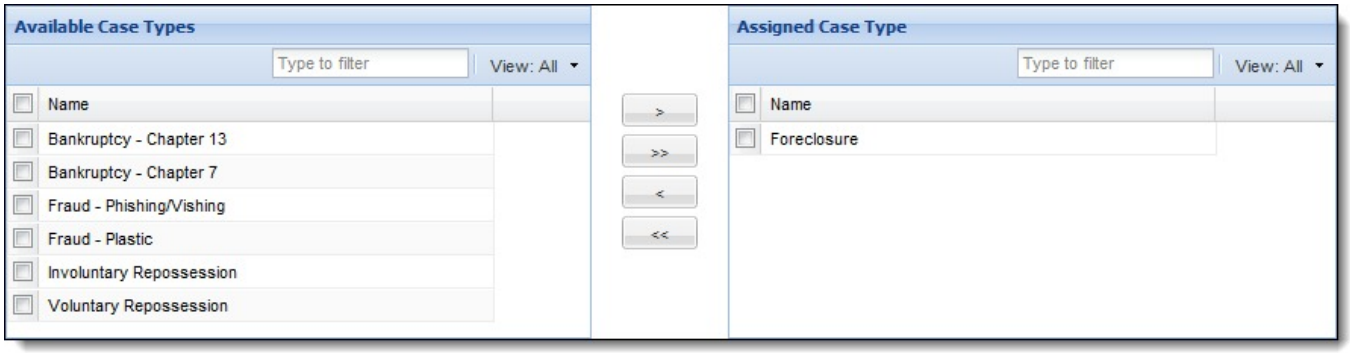
First, he instructs his system administrator to build a rule in the Rules Management application to add the task

template to all foreclosure case types.

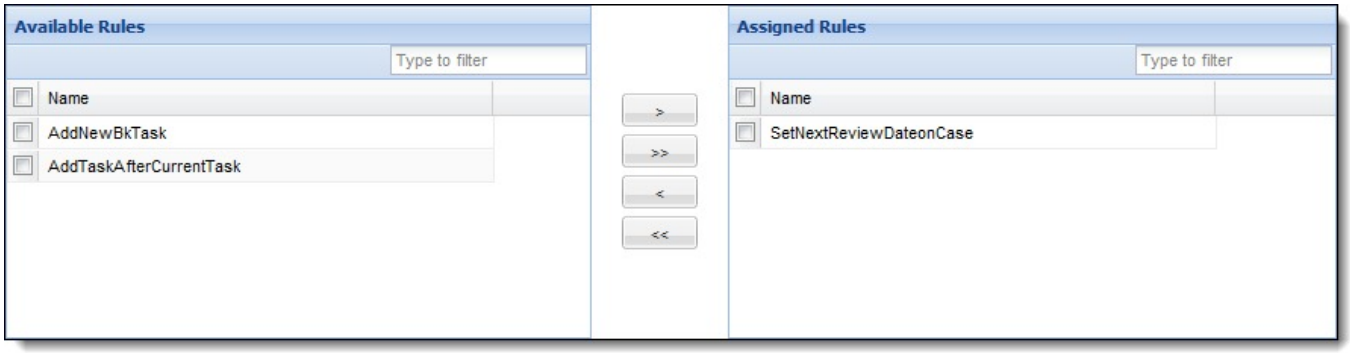
Once the rule is built, he navigates to System Management > Batch Case Processing.



In the list of available case types, he assigns all of the Foreclosure case types.



In the list of available rules, he assigns the new rule that was built.



He clicks **Execute**. A message appears showing the process has started. Once completed, a success message appears.

Just to make sure the process ran properly, he opens a Foreclosure case in the workspace. In the task list, he sees the new task template added.

Letters and Forms: Person vs. Account > Person Fields

Target Audience

This example is helpful for system administrators.

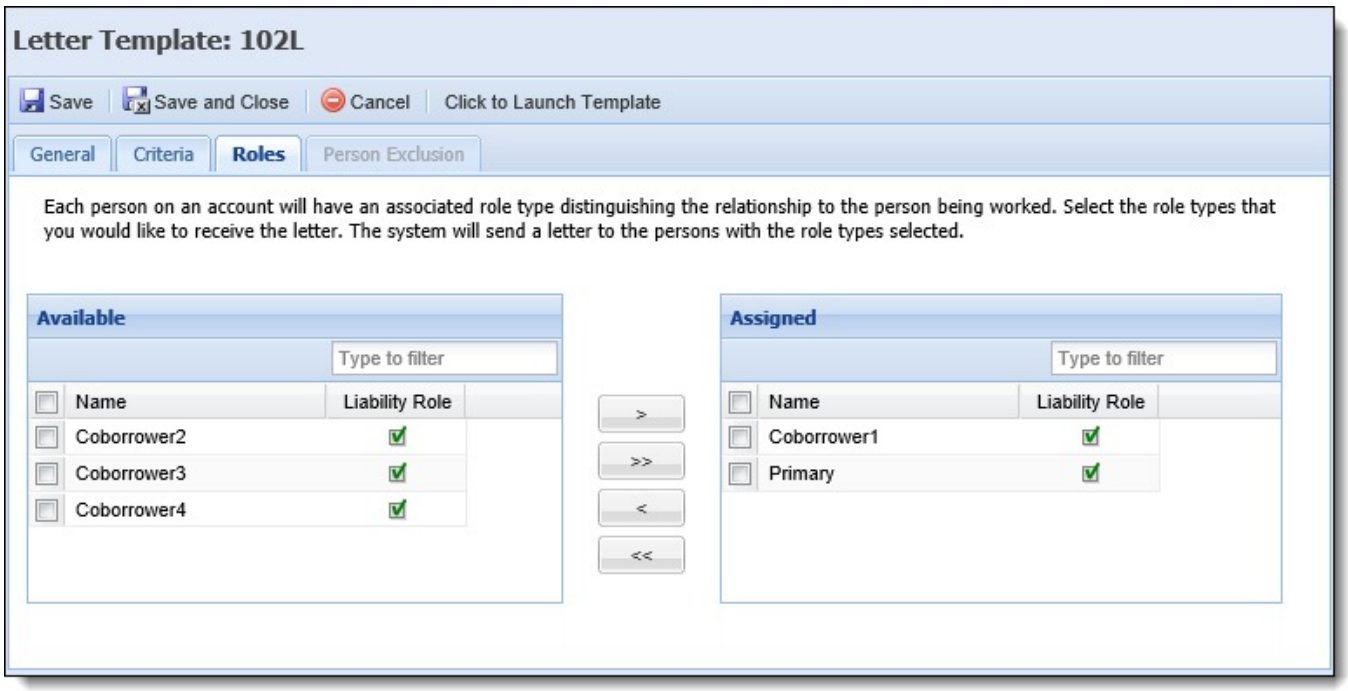
Outcome

This example is to provide system administrators with a business case scenario for when to configure Person fields and when to configure Account > Persons fields to appear in a letter template. At the end of this example, the administrator should have an understanding of what information populates within a letter when a Person field is added versus an Account > Persons field.

Dennis Configures a Letter to Include Both Person Fields and Account > Person Fields

Dennis is an administrator at Temenos Financial. He is configuring a letter to be sent to account holders that have not responded to multiple contact attempts regarding their delinquent accounts. Since several attempts to contact the primary account holder have already been made, the accounts are now severely delinquent and a letter must be generated for each person with a role on the account.

After providing the General and Criteria information, Dennis uses the Roles tab to define each person that should receive a copy of the letter by assigning the applicable role. Once the desired roles are assigned, Dennis opens the letter template editor by selecting **Click to Launch Template**.

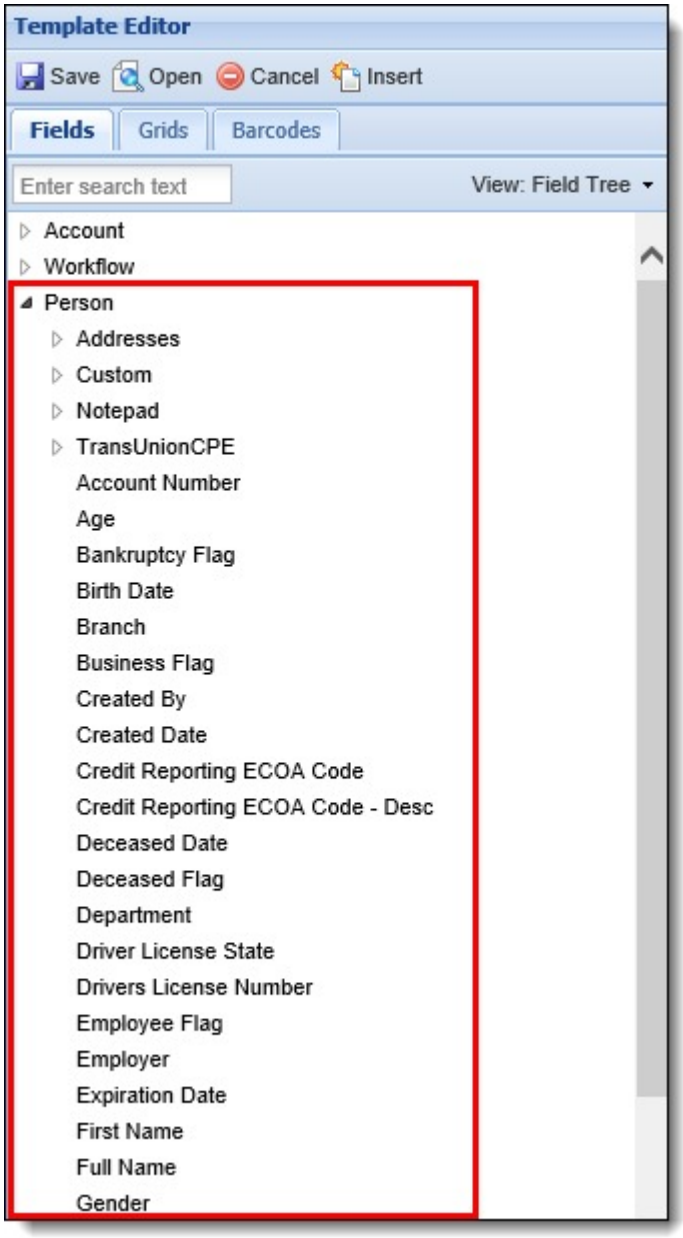


From the Template Editor, Dennis is able to create the letter and add fields that automatically populate information specific to each account holder. He creates the letter message and begins to add fields from the Fields tab. Within the Fields tab, he notices that he can add person fields from two locations: the Person folder and the Account >

Persons folder.

Dennis wants the letter to include a list of the account holders associated with each account, but also needs to ensure that each letter is addressed to a specific person since he wants the letters to be generated for both the Primary and the Coborrower.

Fields under the Person folder provide the ability to personalize the letter for each person regardless of their role on the account. This allows a single letter template to generate multiple letters for more than one person without having to update information within the letter, such as the name of the letter recipient.



By adding the Person >Addresses > Home Address information, Person > Full Name, and Person > First Name fields he ensures that the letter is addressed specifically to the person receiving the letter.

«Full_Name»
«Address_1»
«City__State__Zip»

Account #: «Account_Number»
Balance: $«Balance»
Account Holders: «Full_Name_0»
«Full_Name_1»

WE REALLY NEED TO HEAR FROM YOU!!

Dear «First_Name»,

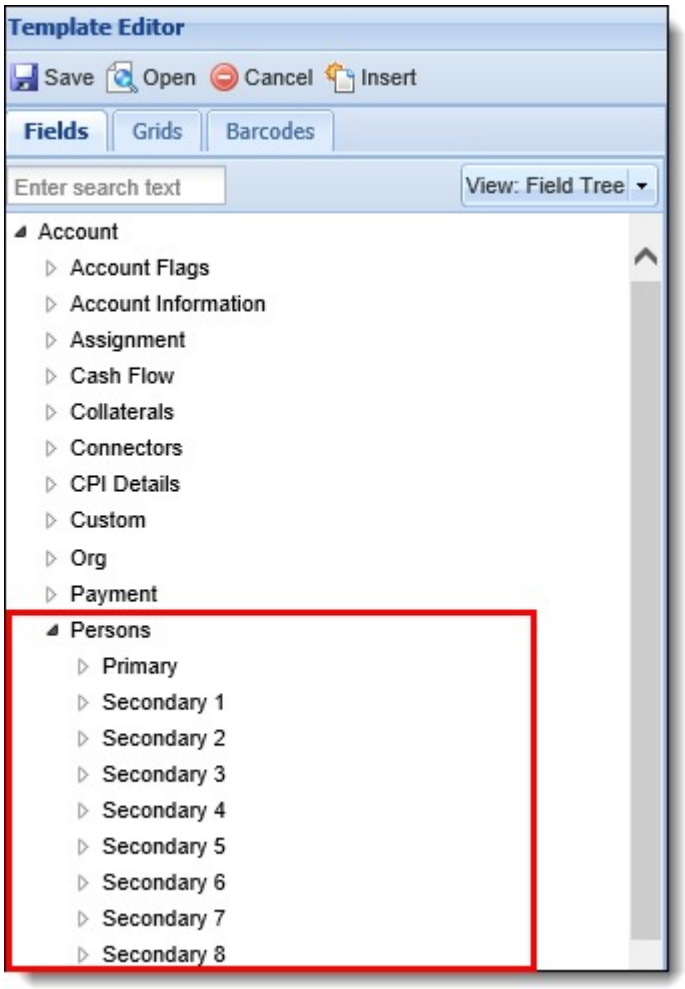
We have made several attempts to contact about the past due payment for the account above and several requests to bring the account current. Your loan is now considered severely delinquent. Unless the past due amount of $«DQ_Amount» is made within 10 days of the date of this notice (no later than «Current_Date_Plus_10»), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses.

Please contact me as soon as possible so that arrangements may be made to bring your account current. Your immediate attention would be greatly appreciated.

Sincerely,

«User_Name»

Next, Dennis wants to include account specific details within the letter, such as the account number, balance, and a list of the account holders, so he navigates to the Account folder. To include a list of the account holders, he selects the Persons folder and adds fields for each desired role. When fields from the Account > Persons folder are configured to appear in a letter, data is populated based on the person's role on the account. This information is static and included on all the letters generated.



For example, in his letter, Dennis wants to include the Full Name of the Primary and Coborrower related to the account. To do this, he adds the Account > Persons > Primary > Full Name field and Account > Persons > Secondary 1 > Full Name field. This populates the full name of the Primary and Secondary related to the account:

«Full_Name»
«Address_1»
«City__State__Zip»

Account #: «Account_Number»
Balance: $«Balance»
Account Holders: «Full_Name_0»
«Full_Name_1»

WE REALLY NEED TO HEAR FROM YOU!!

Dear «First_Name»,

We have made several attempts to contact about the past due payment for the account above and several requests to bring the account current. Your loan is now considered severely delinquent. Unless the past due amount of $«DQ_Amount» is made within 10 days of the date of this notice (no later than «Current_Date_Plus_10»), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses.

Please contact me as soon as possible so that arrangements may be made to bring your account current. Your immediate attention would be greatly appreciated.

Sincerely,

«User_Name»

After the letter is saved and assigned to a workflow, it can be sent to each account holder when the workflow is executed. Since Dennis assigned both the Primary and Coborrower roles to the letter within the Roles tab, when a workflow is executed to send the letter, two letters are generated, one for the Primary account holder and one for the Coborrower.

In the example below, Alexandra is the Primary and Hunter is the Coborrower on the account associated with the letter. Notice that the first letter is addressed specifically to Alexandra:

Alexandra [illegible]
[illegible]

Account #: [illegible]
Balance: $385.43
Account Holders: Alexandra [illegible]
Hunter [illegible]

WE REALLY NEED TO HEAR FROM YOU!!

Dear Alexandra,

We have made several attempts to contact about the past due payment for the account above and several requests to bring the account current. Your loan is now considered severely delinquent. Unless the past due amount of $139.84 is made within 10 days of the date of this notice (no later than 03/20/2015), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses.

Please contact me as soon as possible so that arrangements may be made to bring your account current. Your immediate attention would be greatly appreciated.

Sincerely,

[illegible]

The same letter is generated for the Coborrower, but the person fields populate with Hunter's information:

Hunter

Account #:
Balance: $385.43
Account Holders: Alexandra
Hunter

WE REALLY NEED TO HEAR FROM YOU!!

Dear Hunter,

We have made several attempts to contact about the past due payment for the account above and several requests to bring the account current. Your loan is now considered severely delinquent. Unless the past due amount of $139.84 is made within 10 days of the date of this notice (no later than 03/20/2015), the balance of the loan will be accelerated and the entire balance will become due. Furthermore, the account will be recommended for formal collections. The costs of collection efforts may include, but are not limited to, attorney fees and any additional collection expenses.

Please contact me as soon as possible so that arrangements may be made to bring your account current. Your immediate attention would be greatly appreciated.

Sincerely,

Letters and Forms: Send Letters with Roles

Target Audiences

This example is helpful to both system administrators and end-users.

Outcome

This example is to provide end-users with a business case scenario of how letters function in the Account Servicing moduels, and the expected results when a letter is sent with assigned roles. At the end of this example, the end user should be able to understand why a certain amount of letters were sent even if a user has multiple roles on many accounts.

John Uses an On-Demand Letter to Run a Multi-Account Workflow

John is a representaive at Temenos Federal Credit Union. He is working a person's account, Audrey, who is delinquent on several accounts at the institution. An administrator at the institution has incorporated a pre-built letter template into a send letter workflow step that John can run to send the letter out to the appropriate roles on the accounts. The following criterion has been set on the letter:

- The letter John is using is called “TEM CU Delinquent Letter,” as well as the workflow that was built using the letter.
- It is an On Demand letter.
- The assigned roles on the letter template are Administrator, Loan Co-signer, and Primary.

Prior to running the workflow, John pulls up the Account Relationship screen and sees there are multiple people that have roles associated to Audrey's accounts. Since John has been trying to get in touch of Audrey multiple times on all of her delinquent accounts, he determines that he wants to send a letter not only for the delinquent mortgage account he is on (100101) but also her delinquent auto accounts (100201 and 100202). John also wants to ensure those individuals that have roles associated to the account are notified.

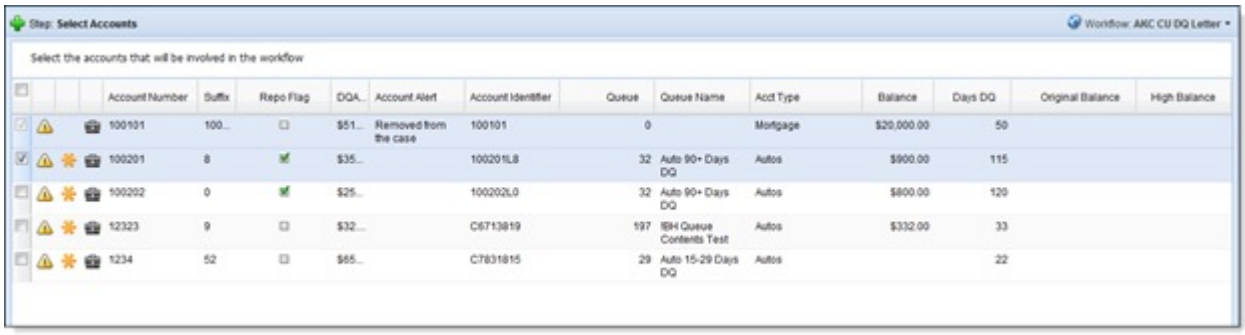
Account Number	Liable	Name	Role	Home phone	Work phone
100101	Yes	ARTURO BERNSTEIN	Primary	610-979-4936	215-895-3608
100101	Yes	LAURA DALY	Administrator	610-979-4936	Phone Work
100101	No	BRIAN IANELLI	Agent	610-979-4936	215-895-7534
100101	No	ESCOBAR MUNSON	Agent	610-979-4936	
100201	Yes	DONNA SNOW	Primary	610-687-5041	215-895-5323
100201	Yes	LATOYA KROLL	Administrator	606-432-7075	314-961-7234
100202	Yes	KIMVERLY BOW	Primary	610-687-5041	215-895-5323
100202	Yes	LATOYA KROLL	Administrator	606-432-7075	314-961-7234

Take note that Latoya has a role on two of Audrey's accounts. How many letters do you think Latoya receives?

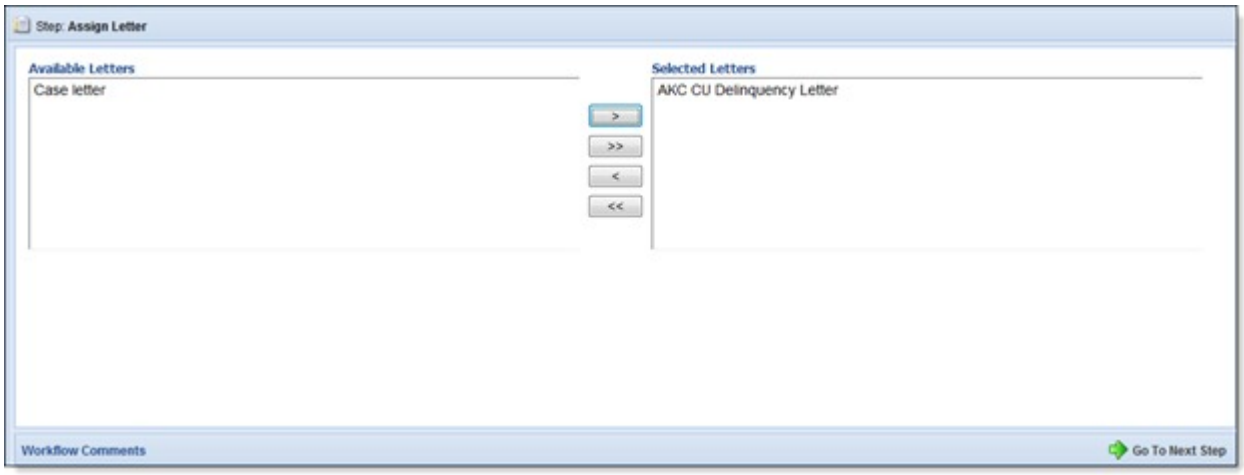
John opens the Workflows menu in the left navigation panel and selects "TEM DQ Letter" from the list of available workflows.

The workflow appears in his workspace.

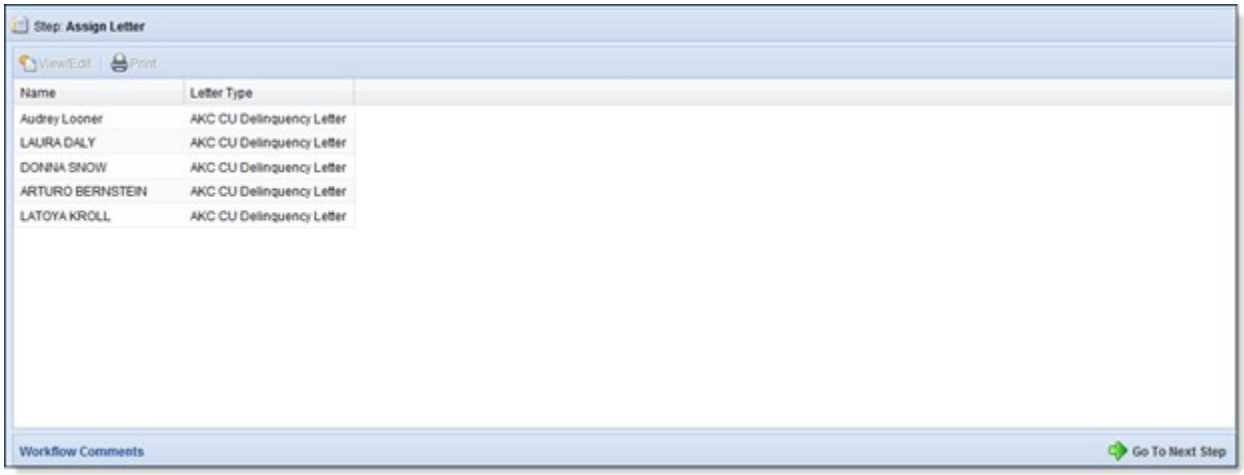
Because it is a multi-account workflow, he chooses which accounts are included when sending the letter in the **Select Accounts** workflow step. The account that is open on the person workspace is selected by default (100101). He chooses account number "100201" and "100202" to be included as well. He clicks **Go To Next Step** to continue the workflow.



The next step appears in the workspace, and John assigns an available letter. He selects the TEM CU Delinquency Letter from the Available letters box and clicks the **>** button to add it to the Selected letters box. He clicks **Go To Next Step** to continue the workflow.



The next step, as part of the "Assign Letter" workflow step, displays who receives the letter based on their relationships to the accounts. John views Audrey's letter to verify that information for each account is displayed on her letter and prints it. He can preview each letter prior to going to the next step by highlighting a person in the list and clicking **View/Edit**. This opens the letter template and template editor. The template editor contains account related fields and allows John, if he wishes, to add additional fields prior to printing and sending the letter.
John views all other letters before he prints him. He stops when he gets to Latoya's preview and realizes she has information regarding two accounts. He then remembers that Latoya was the administrator on two of Audrey's accounts as he sees the information in the letter.



> To view relationships on specific accounts, open a specific account in the workspace and open the Account Relationships system screen.

John may print the letters by highlighting a specific person and clicking **Print.** It automatically prints to his default printer.

Income Interruption

Target Audiences

This example is helpful for end-users.

Outcome

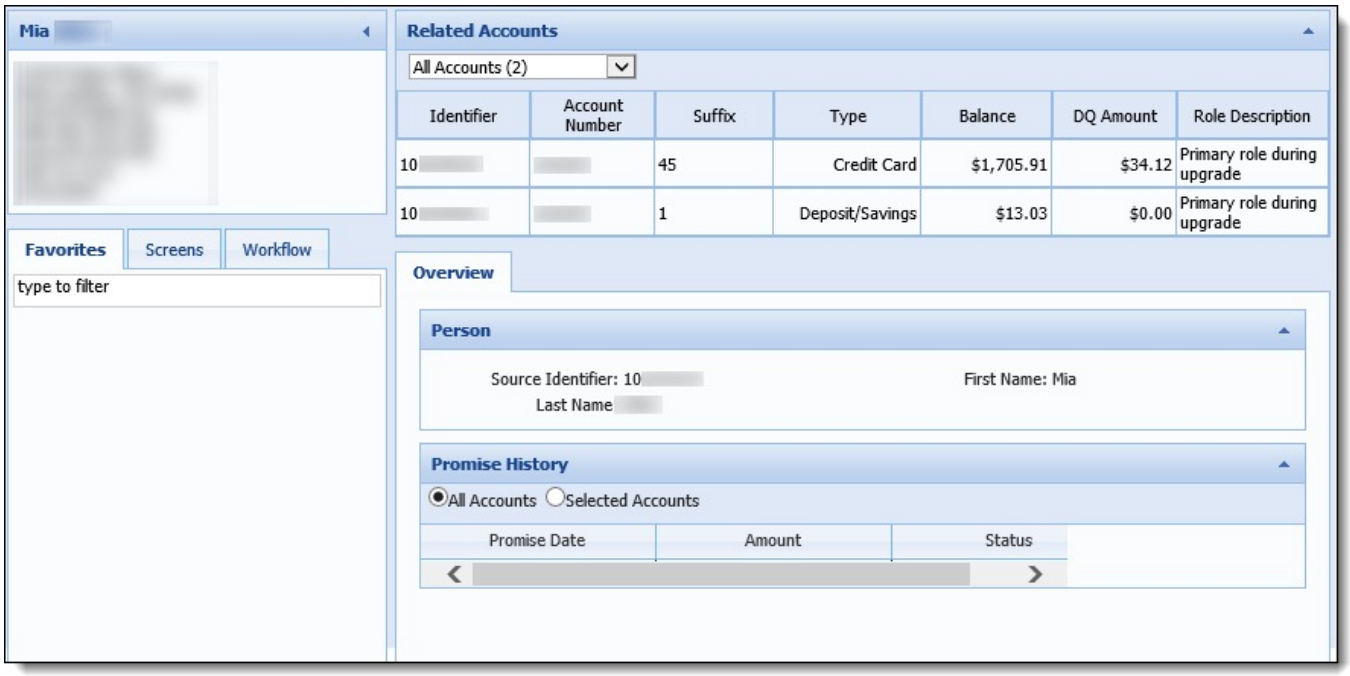
This example is to provide end-users with a business case scenario of how Income Interruption function within the

Collection module, and the expected results when the Income Interruption workflow steps are executed. At the end of this example, the end-user should understand how to use Income Interruption.

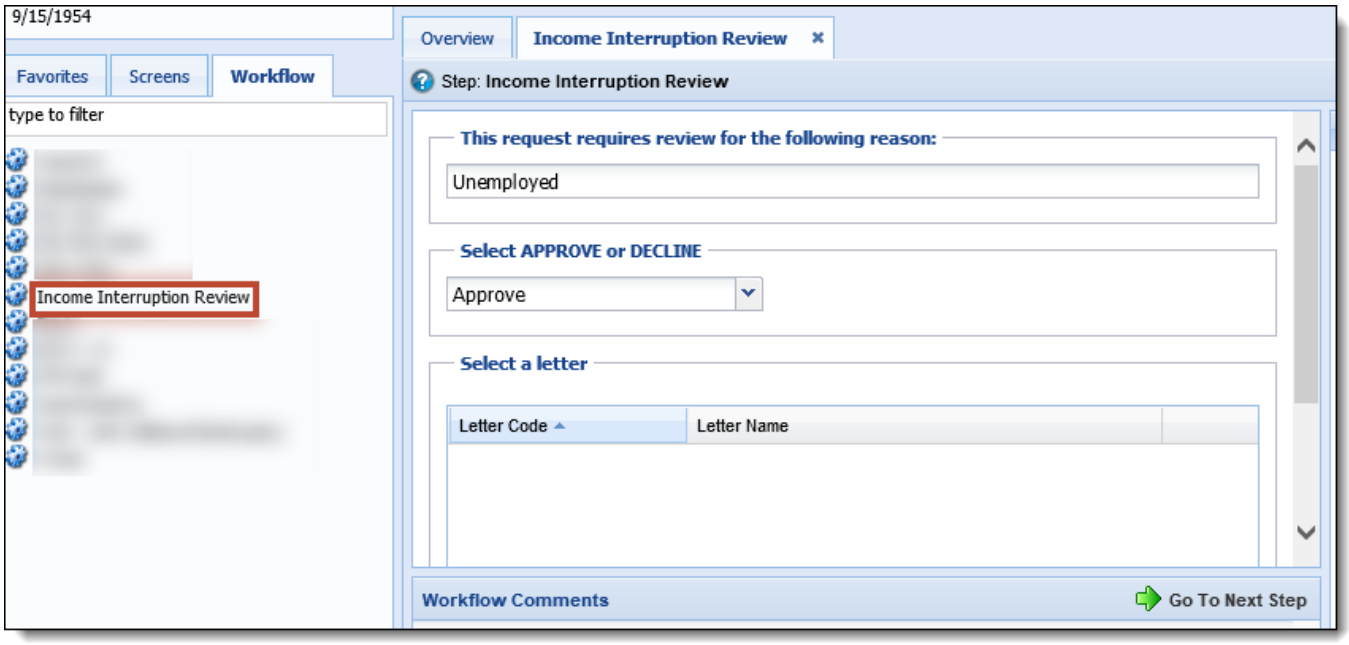
Justin Uses the Income Interruption Review Workflow Step to Review a Request on an Account

Justin is a Collector at Media Credit Union. He has been given the task of reviewing the Income Interruption requests that have been imported into Temenos Infinity. He runs the Income - Approved and Pending Review View his manager created that lists the results of the Income Interruption imports.

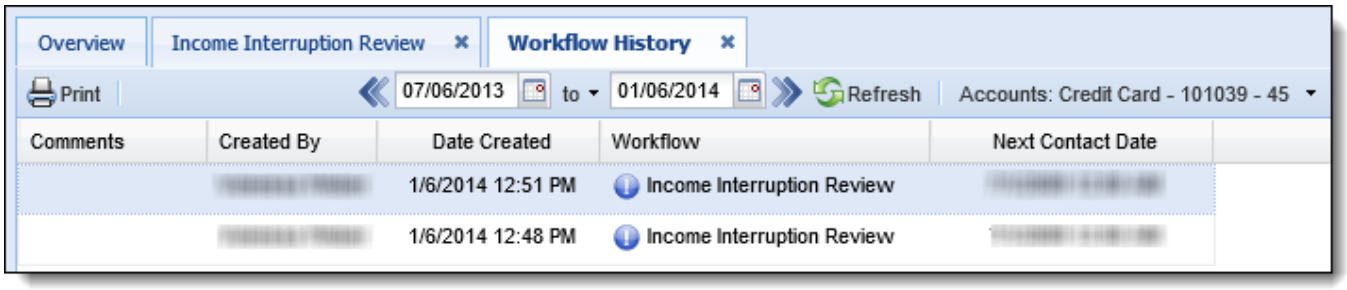
He double-clicks an account with Pending status to open it in the workspace.



On the Workflow tab, he selects the Income Interruption Review workflow his manager set up to approve or reject the Income Interruption request. He enters the reason the request requires review and either Approve or Decline from the drop down. He then selects a letter to be generated on the account to alert the account holder of the Approval or Declined status and clicks Go To Next Step.



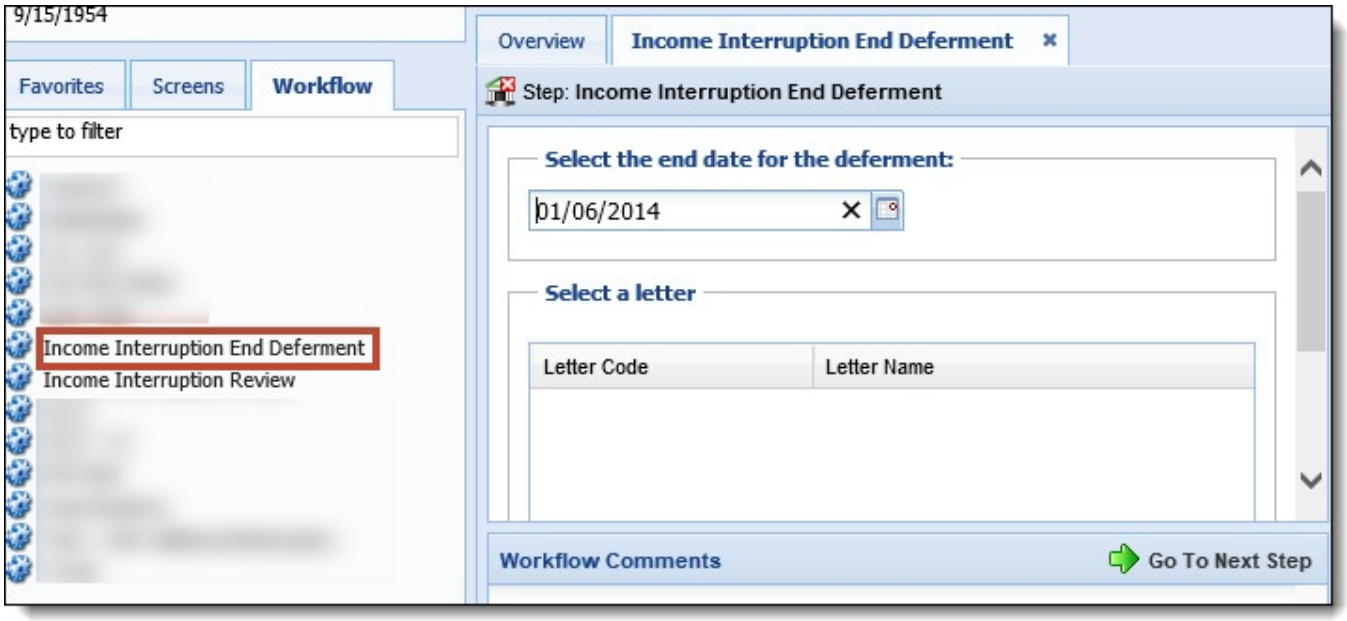
The workflow completes successfully and appears on the Workflow History screen in the workspace.



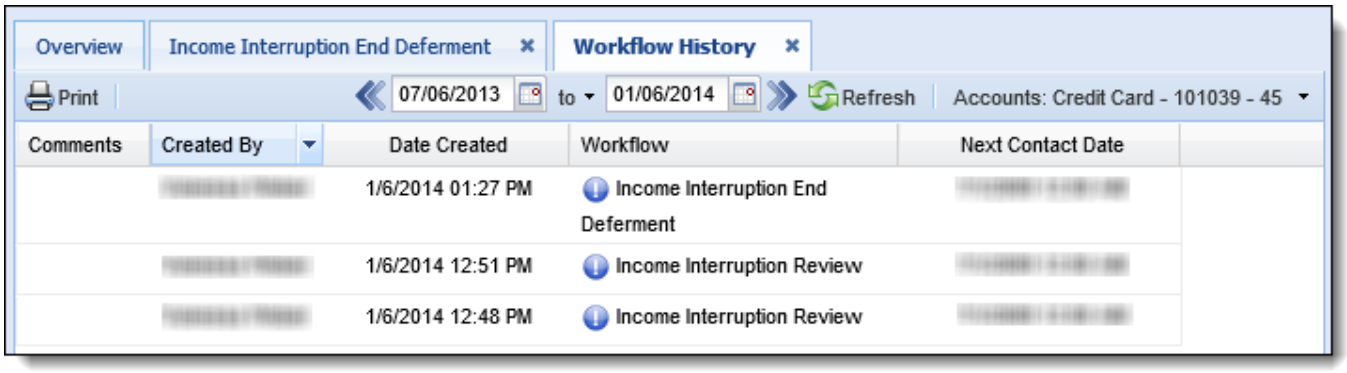
The Income Interruption Export then sends a file of the approved accounts back to the core system and changes the status from Approved to Active.

Justin Uses the Income Interruption End Deferment Workflow Step to Terminate an Income Interruption on an Account

Once Justin receives notification that it is time to end the deferment on this account, he runs the Income Interruption End Deferment workflow step, created by his manager, from the Workflow tab. He selects the date the deferment should end and a letter to be sent to the account holder notifiying them of the end in their deferment. He then clicks Go To Next Step.



The workflow completes successfully, and appears on the Workflow History screen in the workspace.



Pre-Petition and Post-Petition Cash Flows

Target Audiences

This example is helpful for system administrators and end-users.

Outcome

At the conclusion of this topic, users will understand how to configure and use pre-petition and post-petition cash flows in the Collection Module. This topic includes the following information:

- System Administrator
  - Screen Configurations
    - Cash Flow Details Screen
    - Cash Flows Panel
  - User and Security Group Permissions
  - Letters and Forms
- End User
  - Cash Flows Panel
    - Adding a Cash Flow
    - Editing a Cash Flow

- Deleting a Cash Flow
- Cash Flow Details Screen
- Transactions
  - Add Transaction
  - Reverse Transaction
  - Export

System Administrator

Screen Configurations

To use Pre-Petition and Post-Petition Cash Flows within the Collection module, there are several screen and panel configurations which must be completed. To configure screens for pre-petition and post-petition cash flows, navigate to System Management > Screens. Within Screens, system administrators are able to configure the Cash Flow Details screen type to capture and display information such as scheduled payments and transactions. Additionally, Account screens may be configured to include the Cash Flows panel type.

Cash Flow Details Screen

The Cash Flow Details screen is a user-defined screen that may be configured to contain the following panel types:

- Cash Flow Petition
- Cash Flow Scheduled Payments
- Cash Flow Transactions
- Rich Text

Additionally, the Cash Flow Details Screen may be configured to include the Calculate Payments button, which enables users with the appropriate permissions to calculate payments when adding a new cash flow, or editing an existing cash flow.

> Cash Flows exist at both the Pre-Petition and Post-Petition level. Separate screens may be configured to handle each cash flow type. The following fields are available at the Pre-Petition, Post-Petition, and All Cash Flow levels.

Cash Flow Petition Panel

The Cash Flow Petition panel is a user-defined panel that allows institutions to capture cash flow information. This panel may be configured with the following fields:

> These fields may also be included in Dashboards, Letters, Queues, Reports, Search, and Views.

Field Name	Description	Field List Path	Notes
Cash Flow Type	Displays the cash flow type that was selected when the cash flow was created. This field cannot be edited by the user in the workspace.	Account > Cash Flow > Cash Flow Type	Linked to the CASH_FLOW_TYPE lookup within System Management > Field Configurations.

Post-Petition Type	Allows users to identify whether the post-petition cash flow is stipulated or court-ordered.	Account > Cash Flow > Post-Petition Type	Linked to the CF_POST_PETITION_TYPE lookup within System Management > Field Configurations.
Payment Amount	Displays the cash flow's calculated payment amount. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Payment Amount	This field is used when cash flow payments are calculated.
Remaining Term	Displays the remaining term for the scheduled payments in months. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Remaining Term	
Status	Indicates the status of the cash flow. Users may set this field to Closed or Active.	Account > Cash Flow > Status	Linked to the CF_STATUS lookup within System Management > Field Configurations.
Last Payment Date	Displays the last payment date from the calculated payments schedule. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Last Payment Date	
Next Payment Date	Displays the date of the earliest payment yet to be satisfied from the calculated payments schedule. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Next Payment Date	For example, if a debtor owes $200 on the first of every month, and pays a lump sum of $1,000 on June 1st, the Next Payment Date displays as November 1st.

Remaining Balance	Indicates the remaining balance for the pre-petition cash flow. The amount displayed automatically updates based upon modifications to the cash flow, such as adjustments, or payments. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Remaining Balance	
Cash Flow Id	Indicates the unique identifier assigned to the cash flow. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Cash Flow Id	This value is auto-generated by the system, starting at number one.
Next Due Date	Displays the cash flow's next due date. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Next Due Date	This field is used when cash flow payments are calculated.
Original Balance	Displays the balance used to create the cash flow's payment schedule. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Original Balance	This field is used when cash flow payments are calculated.
Adjusted Balance	This will be used to create scheduled payments that might have been altered. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Adjusted Balance	This field is used when adjusted cash flow payments are calculated.

Number of Payments	Indicates the number of payments scheduled for a cash flow. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Number of Payments	This field is used when cash flow payments are calculated.
Payment Frequency	Indicates the interval between payments. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Payment Frequency	Linked to the CF_PAYMENT_FREQUENCY lookup within System Management > Field Configurations. This field is used when cash flow payments are calculated.
Payments Past Due	Indicates the number of payments that are past due. If a cash flow is current, this field displays a zero. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Payments Past Due	This value populates from the Payments Past Due on the scheduled payment for the last transaction.
Solve For	This will be used to determine which fields will be used for the scheduled payments. This field is a read-only field that cannot be edited in the workspace.	Account > Cash Flow > Solve For	Linked to the CF_SOLVE_FOR lookup within System Management > Field Configurations. This field is used when cash flow payments are calculated.

Cash Flow Scheduled Payments Panel

The Cash Flow Scheduled Payments panel is a user-defined grid panel that allows users to view all the payments scheduled for a cash flow. This panel is read-only, and may be configured with the following fields/columns:

These fields may also be included in Dashboards, Letters, Queues, Reports, Search, and Views.

Field Name	Description	Field List Path	Notes
Payment Date	Indicates the date when payments are due.	Account > Cash Flow > Scheduled Payment > Payment Date	Payment Date is calculated based on the Next Due Date and increases incrementally based on the Payment Frequency for the Remaining Term.

Payment Amount	Displays calculated payment amount for the cash flow.	Account > Cash Flow > Scheduled Payment > Payment Amount	
Actual Payment Date	Displays the Transaction Date of the payment that fulfilled the payment.	Account > Cash Flow > Scheduled Payment > Actual Payment Date	The Actual Payment Date populates with each Transaction Date in the statement billing period where the Transaction Type is Payment or Adjustment, and the Transaction has not been reversed. If the only transaction for the statement billing period is reversed, the Actual Payment Date is blank. This field only populates if there is a transaction in the statement billing period.
Total Statement Amount	Displays the total of all transactions that took place in the same month as the Payment Date.	Account > Cash Flow > Scheduled Payment > Total Statement Amount	The Total Payment Amount populates with the Applied Total Amount. The value of this field increases if multiple payments are applied, or decreases if a payment is reversed. This field only populates if there is a transaction in the statement billing period.

Bill Satisfied Date	Displays the date that the total bill amount was satisfied.	Account > Cash Flow > Scheduled Payment > Bill Satisfied Date	The Bill Satisfied Date populates with the Transaction Date that the Payment Amount was paid in full. The Transaction Date may satisfy multiple billing periods of payments depending on the Transaction Amount. This field only populates when the Payment Amount has been paid in full.
Bill Amount Satisfied	Displays the total amount of all payments that were made until the Payment Amount is satisfied.	Account > Cash Flow > Scheduled Payment > Bill Amount Satisfied	Bill Amount Satisfied populates with the total amount of each transaction applied to the Payment Amount in the billing period, up until it is paid in full. This field only populates when the transaction applies to the Payment Amount of the statement billing period.

Total Exclusion Amount	Displays the total of all exclusion amount transactions for a billing period.	Account > Cash Flow > Scheduled Payment > Total Exclusion Amount	Total Exclusion Amount populates with each Transaction Exclusion Amount. The value of this field increases if multiple exclusion payments are applied, or decreases if an exclusion payment is reversed. This field only populates if there is a transaction in the statement billing period.
Actual Payment Variance	Displays the difference between the monthly Payment Amount and the Amount Paid for the payment structure.	Account > Cash Flow > Scheduled Payment > Actual Payment Variance	Actual Payment Variance is equal to the prior billing periods Actual Payment Variance plus the Total Statement Amount minus Payment Amount.

Remaining Balance	Displays the remaining amount owed for the payment structure	Account > Cash Flow > Scheduled Payment > Remaining Balance	Remaining Balance is equal to the prior billing period's Remaining Balance minus the Total Statement Amount. During the first period, the Remaining Balance is equal to: • Original Balance minus the Total Statement Amount, if the Adjusted Balance is null. • Adjusted Balance minus the Total Statement Amount, if the Adjusted Balance is not null.

Payments Past Due	Displays the number of payments that are past due.	Account > Cash Flow > Scheduled Payment > Payments Past Due	Payments Past Due is equal to the Actual Payment Variance divided by Payment Amount multiplied by negative one (/) * -1. Any Actual Payment Variance that is more than half of the Payment Amount is one month past due. This field only populates if there is a transaction in the statement billing period.
Comments	Displays all Transaction Comments for the scheduled payments.	Account > Cash Flow > Scheduled Payments > Comments	Displays the Transaction Comments for the statement billing period. If there are multiple transactions in a statement billing period with transaction comments, the value of each Transaction Comment is concatenated into the Comments field. This field only populates if there is a transaction comment in the statement billing period.

Cash Flow Transactions Panel

The Cash Flow Transactions panel is a system-defined grid panel that allows users to view and process cash flow transactions. This panel contains the following fields/columns:

These fields may also be included in Dashboards, Letters, Queues, Reports, Search, and Views.

Field Name	Description	Field List Path	Notes
Transaction Date	Displays the date of each transaction.	Account > Cash Flow > Transaction > Transaction Date	

Transaction Type	Indicates the type of transaction that was processed.	Account > Cash Flow > Transaction > Transaction Type	Linked to the CF_TRANSACTION_TYPE lookup within System Management > Field Configurations.
Posting Type	Indicates whether the transaction was a debit or a credit.	Account > Cash Flow > Transaction > Posting Type	Linked to the CF_POSTING_TYPE lookup within System Management > Field Configurations.
Transaction Amount	Displays the amount of the transaction that was processed.	Account > Cash Flow > Transaction > Transaction Amount	This field only includes negative numbers when the posting type is Reversal.
Total Exclusion Amount	Displays a total of all exclusion types on the transaction.	Account > Cash Flow > Transaction > Total Exclusion Amount	This field displays a total of all of the Exclusion Amounts for a single Transaction.
Applied Total Amount	Indicates the amount of the transaction that was applied to the payment, and not excluded.	Account > Cash Flow > Transaction > Applied Total Amount	Applied Total Amount is equal to the Transaction Amount minus the Transaction Exclusion Amount. This value applies a negative or positive amount based off of the Posting Type. • For a credit, it appears as positive. • For a debit it appears as negative.
Transaction Comments	Displays any comments to be added to the transaction.	Account > Cash Flow > Transaction > Transaction Comments	
Reversal Reason	Displays the reason for the transaction reversal.	Account > Cash Flow > Transaction > Reversal > Reversal Reason	
IsReversed	Indicates if a transaction was reversed.	Account > Cash Flow Transaction > IsReversed	
Exclusion Fields			
Exclusion Type	Indicates the type of exclusion in which the transaction is categorized.	Account > Cash Flow > Transaction > Exclusion > Exclusion Type	Linked to the CF_EXCLUSION_TYPE lookup within System Management > Field Configurations.

Exclusion Amount	Indicates the amount that was excluded from the payment.	Account > Cash Flow > Transaction > Exclusion > Exclusion Amount	

Rich Text

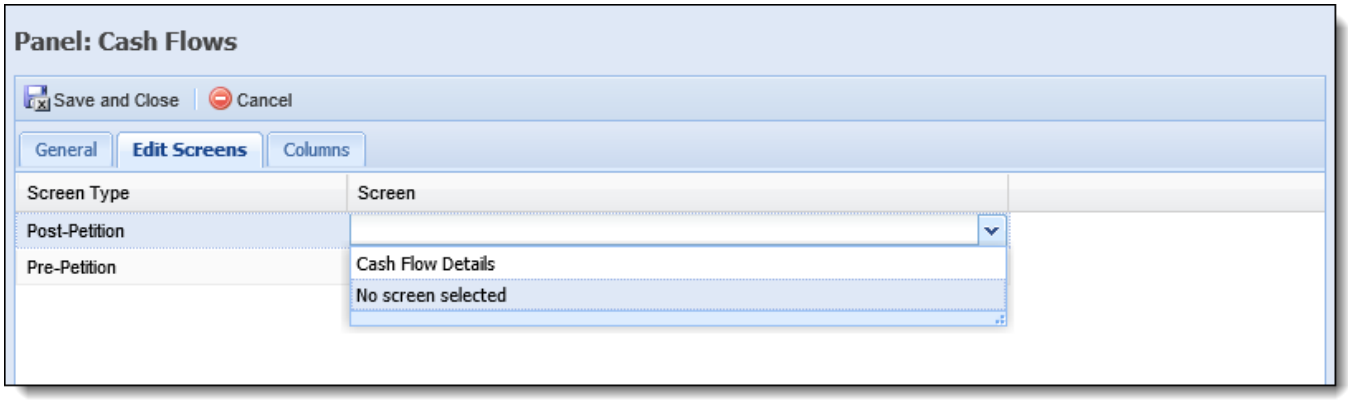
The Rich Text panel allows institutions to display rich text messages to users, such as instructions.

Cash Flows Panel

The Cash Flows panel is a user-defined grid panel that displays all cash flows associated with an account. In addition to the General attributes, this panel consists of the following attributes:

Edit Screens

Edit Screen attributes enable an administrator to identify the Cash Flow Details screen that opens when an end-user adds or edits a Pre-Petition or Post-Petition Cash Flow record. Within the Edit Screens tab, click in the Screen column to identify the screen that opens for Pre-Petition or Post-Petition Cash Flows. The Screen drop-down populates with all Cash Flow Details screens available within System Management > Screens.



Columns

Column attributes enable an administrator to identify the columns that appear within the panel's grid. This panel may be configured with the following fields:

- Cash Flow Type
- Post-Petition Type
- Payment Amount
- Remaining Term
- Status
- Last Payment Date
- Next Payment Date
- Remaining Balance
- Next Due Date
- Original Balance
- Adjusted Balance
- Number of Payments
- Payment Frequency
- Payments Past Due
- Solve For

For more information on these fields, please refer to the Cash Flow Petition Panel section in this topic.

For more information on configuring screens, please refer to the Screens topic in the Administrator Guide.

User and Security Group Permissions

Users and Security Groups may be assigned three collections permissions that enable the ability to add a new or edit an existing cash flow, as well as calculate a new or existing cash flow. To make a change for an individual User, navigate to System Management > Users. To change a Security Group, navigate to System Management > Groups > Security Groups.

Within the Permissions tab, the following permissions are available:

Permission	Description	Options
Add Cash Flow	Allows a user to add a cash flow, and make a transaction.	**None** = Users cannot add a cash flow to an account. **Change** = Users are able to add a cash flow to an account.
Calculate Cash Flow Payments	Allows users to calculate payments when adding a cash flow, or editing a cash flow.	**None** = Users cannot calculate an account's cash flow. **Change** = Users are able to calculate payments when adding or editing a cash flow.
Edit Cash Flow	Allows a user to perform transactions, and update cash flow fields, but not calculate payments.	**None** = Users can not view or update the details of a cash flow. **View** = Allows users to view but not make any changes to the details of a cash flow. **Change** = Allows users to view and make changes to the details of a cash flow.

For more information on configuring user and security group permissions, please refer to the User and Security Group topics within the Administrator Guide.

Letters

Letters may be configured with cash flow fields and grids that enable institutions to communicate cash flow details with debtors. To configure letters to include cash flow details, navigate to System Management > Communication > Letters & Forms.

Within the Template Editor, a Cash Flow drop-down is available in the Fields tab that includes Post-Petition Cash Flow and Pre-Petition Cash Flow fields.

> All Cash Flow Petition, Cash Flow Scheduled Payment, and Cash Flow Transaction fields are available to be added to letter templates at the pre-petition and post-petition levels.

In addition to fields, the Template Editor's Grids tab contains four grids that allow administrators to configure letter templates with scheduled payment and transaction details. Within the Grids tab, the following grids are available:

Grid Name	Description
Pre-Petition Cash Flow Scheduled Payment Fields	Allows the system administrator to add a grid containing the payments scheduled for a pre-petition cash flow.
Pre-Petition Cash Flow Transaction Fields	Allows the system administrator to add a grid containing the transaction details for a pre-petition cash flow.
Post-Petition Cash Flow Scheduled Payment Fields	Allows the system administrator to add a grid containing the payments scheduled for a post-petition cash flow.
Post-Petition Cash Flow Transaction Fields	Allows the system administrator to add a grid containing the transaction details for a post-petition cash flow.

> For more information on these cash flow fields, please refer to the Screens section earlier within this topic.

End User

Cash Flows Panel

The Cash Flows panel allows users, with the appropriate permissions, to view all existing pre-petition and post-petition cash flows associated with an account, as well as add new or edit existing cash flows.

Cash Flows

Add Edit Delete

Adjusted Balance	Cash Flow Type	Last Payment Date	Next Due Date	Next Payment Date	Number Of Payments	Original Balance	Payment Amount	Payment Frequency	Payments Past Due	Post Petition Type	Remaining Balance	Remaining Term	Solve For	Status
$12,000.00	Pre-Petition	08/09/2017	08/07/2017	12/07/2018	60	$12,000.00	$200.00	Monthly	0	Stipulated	$8,800.00	44	Adjusted Balance	
	Pre-Petition		08/09/2017		0	$0.00	$0.00			Court Ordered				Active
	Pre-Petition		08/09/2017		0	$0.00	$0.00							Active

Within this panel, the following columns/fields may appear:

Field Name	Description

Cash Flow Type	Indicates whether the cash flow is Pre-Petition or Post-Petition. • A pre-petition cash flow is a payment plan established between the debtor and the instituion, prior to the account holder filing for bankruptcy. • A post-petition cash flow is a payment plan established between the debtor and the instituion, after the account holder files for bankruptcy.
Post-Petition Type	Indicates whether the post-petition cash flow is Stipulated or Court-Ordered.
Payment Amount	Displays the cash flow's calculated payment amount for the cash flow.
Remaining Term	Displays the remaining term for the scheduled payments in months.
Status	Indicates the status of the cash flow. Users may set this field to Closed or Active.
Last Payment Date	Displays the last payment date from the calculated payments schedule.
Next Payment Date	Displays the date of the earliest payment that has yet to be satisfied from the calculated payments schedule. For example, if a debtor owes $200 on the first of every month, and pays a lump sum of $1,000 on June 1st, the Next Payment Date displays as November 1st
Remaining Balance	Indicates the remaining balance for the pre-petition cash flow. The amount displayed automatically updates based upon modifications to the cash flow, such as adjustments or payments.
Next Due Date	Displays the next due date for the cash flow.
Original Balance	Displays the balance used to create the cash flow's payment schedule.
Adjusted Balance	Indicates the adjusted balance that was used to create scheduled payments on an edited cash flow.
Number of Payments	Indicates the number payments that are scheduled for a cash flow.
Payment Frequency	Indicates whether the interval between payments is Bi-weekly, Monthly, Semi-monthly, or Weekly.
Payments Past Due	Indicates the number of payments that are past due. If a cash flow is current, this field displays a zero.
Solve For	Indicates whether the solve for method used to calculate a cash flow's payments is Adjusted Balance, Number of Payments, Original Balance, or Payment Amount.

In addition to the grid, the Cash Flows panel contains the following action buttons at the top of the panel:

> These buttons are disabled unless the appropriate permissions are assigned to a User or Security Group. For more information on cash flow permissions, please refer to the User and Security Group Permissions section within this topic's System Administrator section.

Icon	Description
Add	Allows a user to add a cash flow to the account in context. Upon clicking Add, users are able to select Pre-Petition or Post-Petition to add the desired cash flow type.
Edit	Allows a user to edit a cash flow.
Delete	Allows a user to remove a cash flow.

Panel Actions

Within the Cash Flow panel, users are provided with the ability to perform the following actions:

Adding a Cash Flow

To add a cash flow to an account:

- Click Add.
- Identify whether a Pre-Petition or Post-Petition cash flow is being added to the account.
- The Cash Flow Details screen opens.

> For more information on using the Cash Flow Details screen, please see the Cash Flow Details Screen section in this topic.

- Complete all applicable fields in the Cash Flow Petition panel, and click Save.

> Users are unable to calculate a payment schedule for a cash flow until a new cash flow has been saved at least once. Once the cash flow has been saved, the calculate payments button becomes active.

	Note Box	

- Click Calculate Payments to add a payment schedule to the cash flow. The Calculate Cash Flow Payments window opens. Enter the desired terms.

> For more information on calculating a cash flow's payment schedule, please see the Calculating a Payment Schedule section in this topic.

- Once the cash flow payment terms have been entered, click Calculate. The Calculate Cash Flow Payments window closes, and the payment schedule and details populate within the Cash Flow Scheduled Payments panel.
- Click Save and Close to exit the Cash Flow Details screen. The cash flow's details populate within the Cash Flows panel.

Editing a Cash Flow

To edit a cash flow:

- Select the cash flow to be edited from the Cash Flows panel by double-clicking on the item within the panel grid, or highlighting the desired item and clicking Edit.
- The Cash Flow Details screen opens. Update the desired cash flow attributes.

- Once the cash flow details have been updated, click Save and Close to exit the Cash Flow Details screen. The updated details populate within the Cash Flows panel.

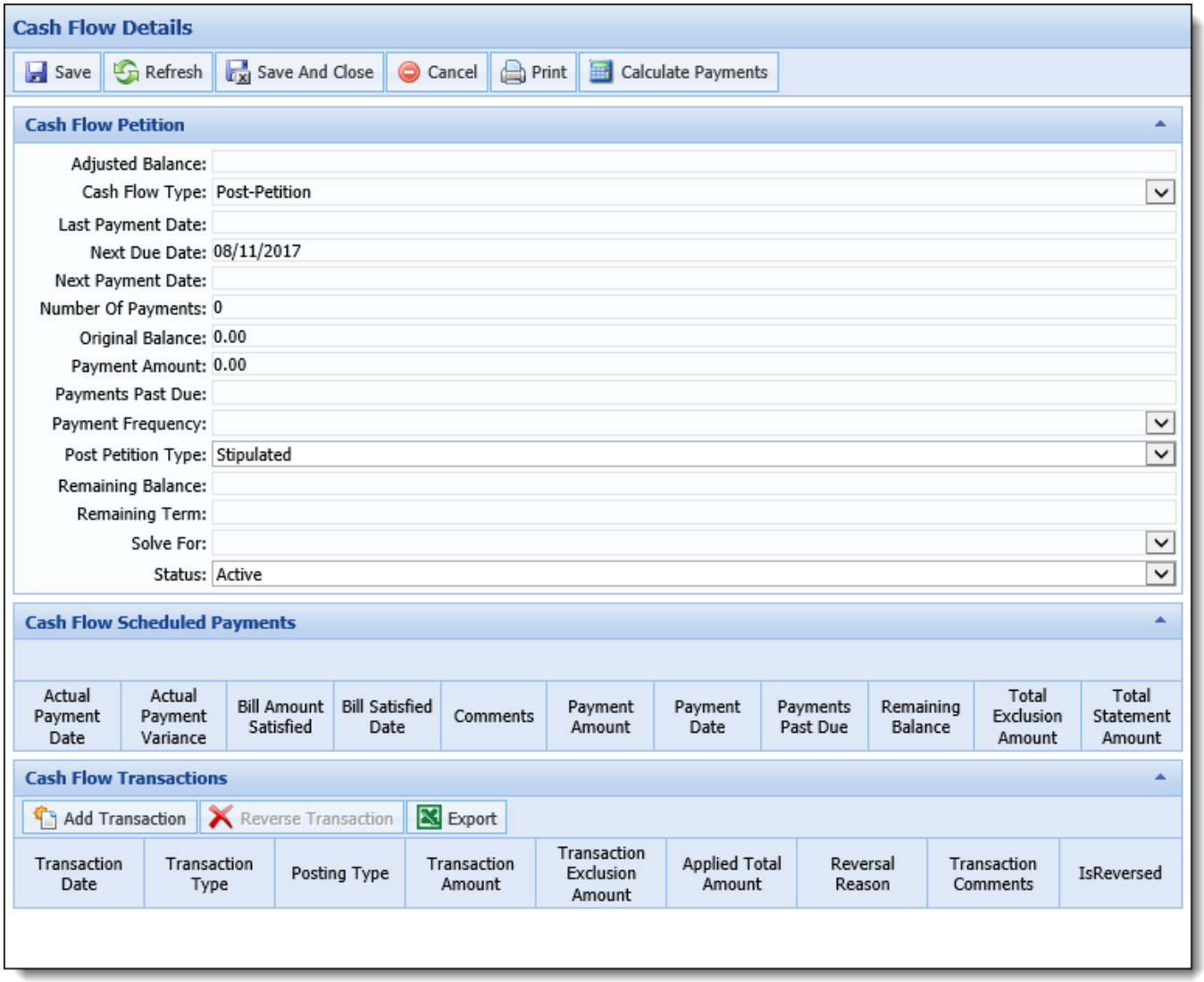
Deleting a Cash Flow

To delete a cash flow from an account:

- Highlight the cash flow to be removed from the Cash Flows panel and click Delete.
- A Confirmation Message appears. Click **Yes** to delete the cash flow. Click **No** to retain the cash flow.

Cash Flow Details Screen

The Cash Flow Details screen allows users, with the appropriate permissions, to view and maintain the cash flows associated with an account. This screen may be accessed directly from the Left Navigation Panel, or by adding or editing a cash flow from the Cash Flows panel.



The Cash Flow Details screen consists of two sections:

- Action Buttons
- Panels

Action Buttons

The Cash Flow Details screen contains buttons that allow users to perform the following actions:

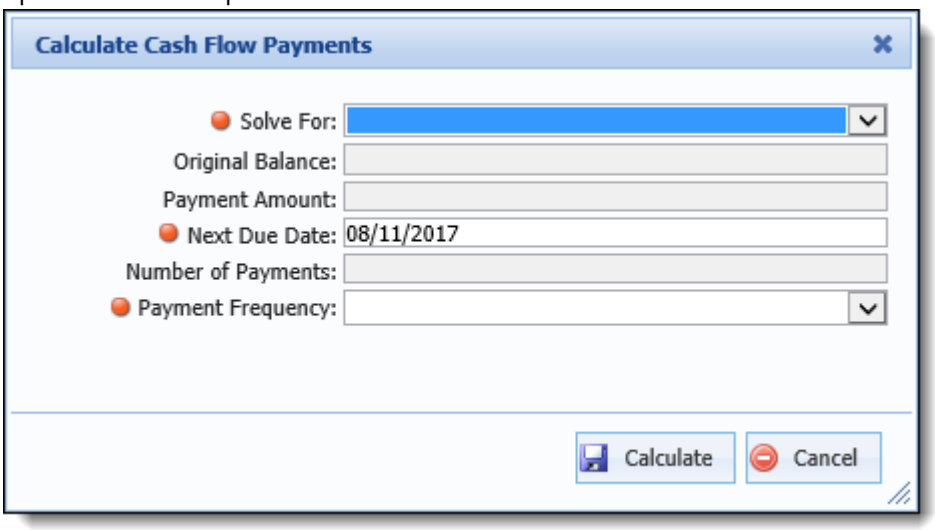
Button	Description
Save	Allows users to save the information entered within the Cash Flow Details screen.
Refresh	Allows users to refresh the details displayed within the Cash Flow Details screen.
Save and Close	Allows users to save the cash flow details, and exit the Cash Flow Details screen.
Cancel	Allows users to close the Cash Flow Details screen without saving changes to the cash flow.
Print	Allows users to print the details of a cash flow.

Allows users to calculate a payment schedule for a cash flow. Reference the section below for an overview of how to calculate payments within the Cash Flow Details screen:

▶ Calculate Payments

Upon clicking

, the Calculate Cash Flow Payments window opens in the workspace.



The fields that display within the Calculate Cash Flow Payments window vary based on whether a payment schedule is being calculated for the first time, or being re-calculated. The table below indicates the fields that display within the Calculate Cash Flow Payments window, as well as when they are available:

Field	Description	Available During
Reset Scheduled Payments	Allows users to replace the existing payment schedule with the recalculated repayment schedule.	Recalculation
Solve For	Allows users to select the value that the calculator is to "solve for."	Initial Calculation and Recalculation
Original Balance	Allows users to indicate and solve for the original balance used to create the cash flow's payment schedule.	Initial Calculation and Recalculation
Adjusted Balance	Allows users to set and solve for a new balance used to calculate an adjusted cash flow payment schedule.	Recalculation
Payment Amount	Allows users to indicate and solve for amount to be paid on each due date.	Initial Calculation and Recalculation

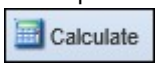
Next Due Date	Allows users to indicate the next date a payment is to be made.	Initial Calculation and Recalculation
Number of Payments	Allows users to indicate and solve for how many payments are to be made during the payment schedule.	Initial Calculation and Recalculation
Payment Frequency	Allows users to indicate whether the interval between payments is Bi-weekly, Monthly, Semi-monthly, or Weekly.	Initial Calculation and Recalculation

When calculating a payment schedule, the required input fields vary based on the selected Solve For method.

Solve For Method	Required Fields
Initial Calculation	
Number of Payments	• Solve For • Original Balance • Payment Amount • Next Due Date • Payment Frequency
Original Balance	• Solve For • Payment Amount • Next Due Date • Number of Payments • Payment Frequency
Payment Amount	• Solve For • Original Balance • Next Due Date • Number of Payments • Payment Frequency
Recalculation	
Adjusted Balance	• Solve For • Payment Amount • Next Due Date • Number of Payments • Payment Frequency

Number of Payments	• Solve For • Adjusted Balance • Payment Amount • Next Due Date • Payment Frequency If the Reset Scheduled Payments field is selected, the Adjusted Balance field is disabled, and the Original Balance field becomes a required input field.
Payment Amount	• Solve For • Adjusted Balance • Next Due Date • Number of Payments • Payment Frequency If the Reset Scheduled Payments field is selected, the Adjusted Balance field is disabled, and the Original Balance field becomes a required input field.

To calculate payments for a cash flow:

- Enter the input fields, as required.
- Click  to generate payment schedule.
- The Calculate Cash Flow Payments window closes, and the payment schedule populates within the Cash Flow Scheduled Payments panel.

Panels

Depending on configurations made by the system administrator, the Cash Flow Details screen may contain the following panels:

▸ Cash Flow Petition

The Cash Flow Petition panel allows users to view and edit capture cash flow information.

The Cash Flow Petition panel may be configured with the following fields:

Field Name	Description	Editable?
Cash Flow ID	Indicates the unique identifier assigned to the cash flow. This value is auto-generated by the system, starting with the number one.	
Cash Flow Type	Indicates whether the cash flow is Pre-Petition or Post-Petition.	
Post-Petition Type	Indicates the post-petition cash flow's type. Users may set this field to Stipulated or Court-Ordered.	Yes
Payment Amount	Displays the calculated payment amount for the cash flow.	
Remaining Term	Displays the remaining term for the scheduled payments in months.	
Status	Indicates the status of the cash flow. Users may set this field to Closed or Active.	Yes
Last Payment Date	Displays the last payment date from the calculated payments schedule.	
Next Payment Date	Displays the date of the earliest payment that has yet to be satisfied from the calculated payments schedule. For example, if a debtor owes $200 on the first of every month, and pays a lump sum of $1,000 on June 1st, the Next Payment Date displays as November 1st	
Remaining Balance	Indicates the remaining balance for the pre-petition cash flow. The amount displayed automatically updates based upon modifications to the cash flow, such as adjustments or payments.	
Next Due Date	Displays the next due date for the cash flow.	
Original Balance	Displays the balance used to create the cash flow's payment schedule.	
Adjusted Balance	Indicates the adjusted balance that was used to create scheduled payments on an edited cash flow.	
Number of Payments	Indicates the number payments are scheduled for a cash flow.	

Payment Frequency	Indicates whether the interval between payments is Bi-weekly, Monthly, Semi-monthly, or Weekly.	
Payments Past Due	Indicates the number of payments that are past due. If cash flow is current, this field displays a zero.	
Solve For	Indicates whether the solve for method used to calculate a cash flow's payments is Adjusted Balance, Number of Payments, Original Balance, or Payment Amount.	

Cash Flow Scheduled Payments

The Cash Flow Scheduled Payments panel is a read-only grid panel that allows users to view all payments scheduled for a cash flow.

Cash Flow Scheduled Payments

Actual Payment Date	Actual Payment Variance	Bill Amount Satisfied	Bill Satisfied Date	Comments	Payment Amount	Payment Date	Payments Past Due	Remaining Balance	Total Exclusion Amount	Total Statement Amount
08/09/2017	$3,000.00	$200.00	08/08/2017		$200.00	08/07/2017	0	$8,800.00	$25.00	$3,200.00
09/09/2017	$2,805.00	$200.00	08/09/2017		$200.00	09/07/2017	0	$8,795.00	$20.00	$5.00
			08/09/2017		$200.00	10/07/2017				
			08/09/2017		$200.00	11/07/2017				
			08/09/2017		$200.00	12/07/2017				
			08/09/2017		$200.00	01/07/2018				
			08/09/2017		$200.00	02/07/2018				
			08/09/2017		$200.00	03/07/2018				
			08/09/2017		$200.00	04/07/2018				

The Cash Flow Scheduled Payments panel may be configured to contain the following fields/columns:

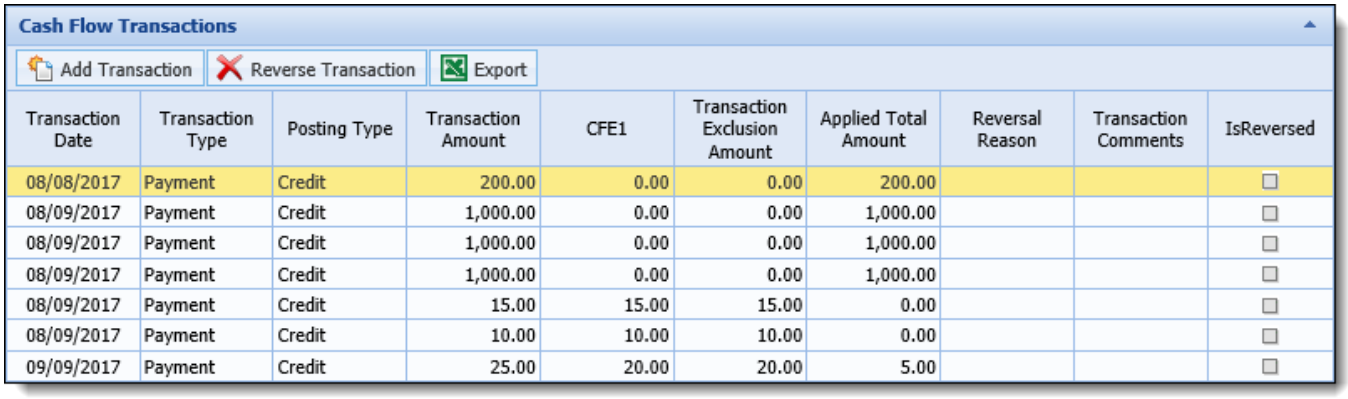
Field Name	Description
Payment Date	Indicates the date when payments are due. This field is calculated based on the Next Due Date, and increases incrementally based on the Payment Frequency for the Remaining Term.
Payment Amount	Displays the calculated payment amount for the cash flow.
Actual Payment Date	Displays the date of the transaction that fulfilled the payment in full. This field populates with each Transaction Date in the statement billing period where the Transaction Type is Payment or Adjustment, and the Transaction has not been reversed. If the only transaction in that statement billing period was reversed, the Actual Payment Date is blank. This field only populates if there is a transaction in the statement billing period.
Total Statement Amount	Displays the total of all transactions that took place in the same month as the Payment Date. This field populates with the Applied Total Amount, and increases when multiple payments are applied, or decreases if a payment is reversed. This field only populates if there is a transaction in the statement billing period.

Bill Satisfied Date	Displays the date that the total bill amount was satisfied. This field populates with the Transaction Date that the Payment Amount was paid in full. The Transaction Date may satisfy multiple billing periods of payments depending on the Transaction Amount. This field only populates when the Payment Amount has been paid in full.
Bill Amount Satisfied	Displays the total amount of all payments that were made until the Payment Amount was satisfied. This field populates with total amount of each transaction that is applied to the Payment Amount in the billing period, up until it is paid in full. This field only populates when the transaction applies to the Payment Amount of the statement billing period.
Total Exclusion Amount	Displays the total of all exclusion amount transactions for a billing period. This field populates with each Transaction Exclusion Amount, and increases if multiple exclusion payments are applied, or decreases if an exclusion payment is reversed. This field only populates if there is a transaction in the statement billing period.
Actual Payment Variance	Displays the difference between the monthly Payment Amount, and the Amount Paid for the payment structure. Actual Payment Variance is equal to the following for the prior billing period: (Actual Payment Variance + Total Statement Amount) - Payment Amount.
Remaining Balance	Displays the remaining amount owed for the payment structure. Remaining Balance is equal to the following for the prior billing period: (Remaining Balance - Total Statement Amount.) During the first period, the Remaining Balance is equal to: • Original Balance minus the Total Statement Amount, if the Adjusted Balance is null. • Adjusted Balance minus the Total Statement Amount, if the Adjusted Balance is not null.
Payments Past Due	Displays the number of payments that are past due. Payments Past Due is equal to the following: (Actual Payment Variance/Payment Amount) * -1. Any Actual Payment Variance that is more than half of the Payment Amount is one month past due. This field only populates if there is a transaction in the statement billing period.

Comments	Displays all Transaction Comments for the scheduled payments. If there are multiple transactions in a statement billing period that include transaction comments, the value of each Transaction Comment is concatenated into the Comments field. This field only populates if there is a transaction comment in the statement billing period.

Cash Flow Transactions

The Cash Flow Transactions panel is a system-defined grid panel that allows users to view and process cash flow transactions.



Cash Flow Transactions

Add Transaction | Reverse Transaction | Export

Transaction Date	Transaction Type	Posting Type	Transaction Amount	CFE1	Transaction Exclusion Amount	Applied Total Amount	Reversal Reason	Transaction Comments	IsReversed
08/08/2017	Payment	Credit	200.00	0.00	0.00	200.00			☐
08/09/2017	Payment	Credit	1,000.00	0.00	0.00	1,000.00			☐
08/09/2017	Payment	Credit	1,000.00	0.00	0.00	1,000.00			☐
08/09/2017	Payment	Credit	1,000.00	0.00	0.00	1,000.00			☐
08/09/2017	Payment	Credit	15.00	15.00	15.00	0.00			☐
08/09/2017	Payment	Credit	10.00	10.00	10.00	0.00			☐
09/09/2017	Payment	Credit	25.00	20.00	20.00	5.00			☐

This panel contains the following fields/columns:

Field Name	Description
Transaction Date	Displays the date of each transaction.
Transaction Type	Indicates the type of transaction that was processed.
Posting Type	Indicates whether the transaction was a debit or a credit.
Transaction Amount	Displays the amount of the transaction that was processed.
Total Exclusion Amount	Displays a total of all exclusion types on the transaction.
Applied Total Amount	Indicates the amount of the transaction that was applied to the payment, and not excluded. Applied Total Amount is equal to the Transaction Amount minus the Transaction Exclusion Amount. This value applies a negative or positive amount based off of the Posting Type. • For a credit, it appears as positive. • For a debit it appears as negative.
Transaction Comments	Displays any comments to be added to the transaction.
Reversal Reason	Displays the reason for the transaction reversal.
Reversed	Indicates if a transaction was reversed.
Exclusion Fields	
Exclusion Type	Indicates the type of exclusion in which the transaction is categorized.

Exclusion Amount	Indicates the amount that was excluded from the payment.

In addition to the grid, this panel contains action buttons, that allows users to perform the following cash flow transactions:

Button	Description
Add Transaction	Allows users to process payments and adjustments on a cash flow.
Reverse Transaction	Allows users to reverse a payment or adjustment that was previously processed on a cash flow.
Export	Allows users to export a cash flow's transactions to a spreadsheet.

For more information on processing cash flow transactions, please see the Transactions section in this topic.

Rich Text

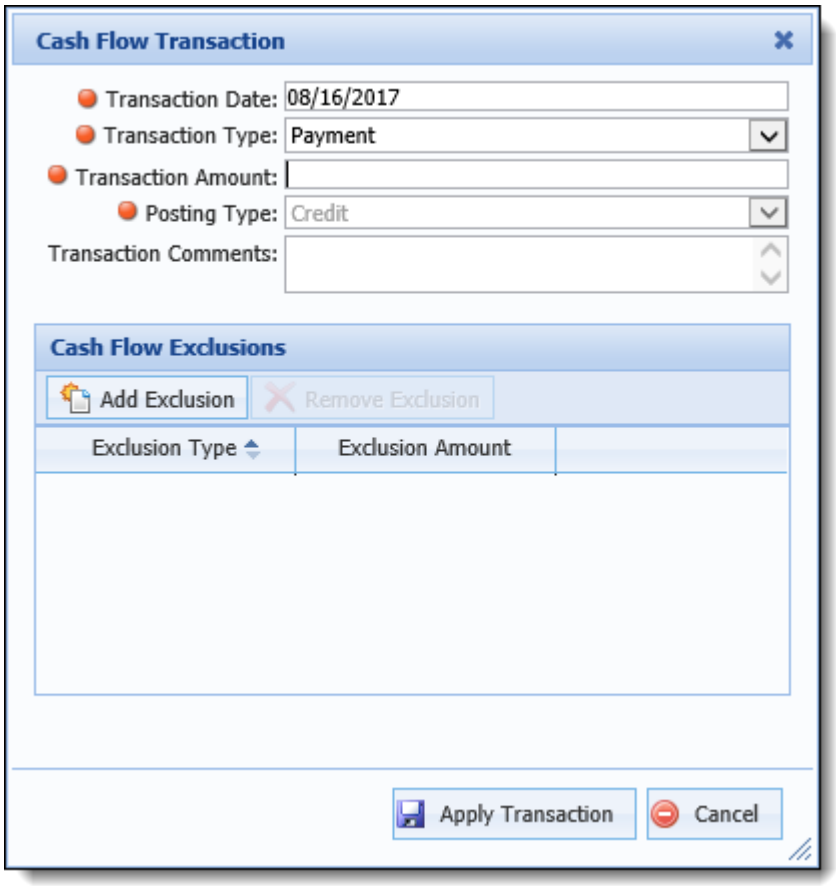
The Rich Text panel allows institutions to display rich text messages to users, such as instructions.

Processing Transactions

When the Cash Flow Details screen is configured to include the Cash Flow Transaction panel, users are able to process transactions, such as payments and reversals on a cash flow.

Add Transactions

End users are able to process payments, adjustments, and exclusion transactions on a cash flow by clicking Add Transaction located within the top of the Cash Flow Transaction panel. When clicked, the Cash Flow Transaction window opens in the workspace.



The Cash Flow Transaction window contains the following transaction fields:

Field	Description
Transaction Date	Allows users to indicate the date that the transaction should be applied.
Transaction Type	Allows users to identify whether the transaction is a payment, or an adjustment. Select **Payment** to process a regular payment transaction on the cash flow. Select **Adjustment** to process a transaction that directly increases or decreases the Remaining Balance owed.
Transaction Amount	Allows users to enter the total amount of the transaction being processed.
Posting Type	Allows users to indicate whether the transaction debits or credits the cash flow. If the Transaction Type is Payment, the posting type is automatically set to Credit. If the Transaction Type is Payment, users are unable to change the posting type. If the Transaction Type is Adjustment: • Select Credit to post a credit against the cash flow in the amount of the Transaction Amount. • Select Debit to post a debit against the cash flow in the amount of the Transaction Amount.
Transaction Comments	Allows users to input additional commentary on the transaction.

In addition to the above fields, the Cash Flow Transaction window contains a Cash Flow Exclusions panel. Within

this panel, users are able to specify if all or a portion of the transaction amount should be excluded from a payment, or adjustment. This panel consists of the following action buttons:

Button	Description
Add Exclusion	Allows users to add an exclusion to a cash flow transaction.
Remove Exclusion	Allows users to remove an exclusion from a cash flow transaction.

The grid that appears below the buttons allows users to view and maintain transaction exclusions. This grid consists of the following columns:

Column	Description
Exclusion Type	Allows users to view and set the type of exclusion included in the transaction from a drop-down list.
Exclusion Amount	Allows users to view and set the exclusion amount included in the transaction.

Adding a Transaction

To add a Transaction:

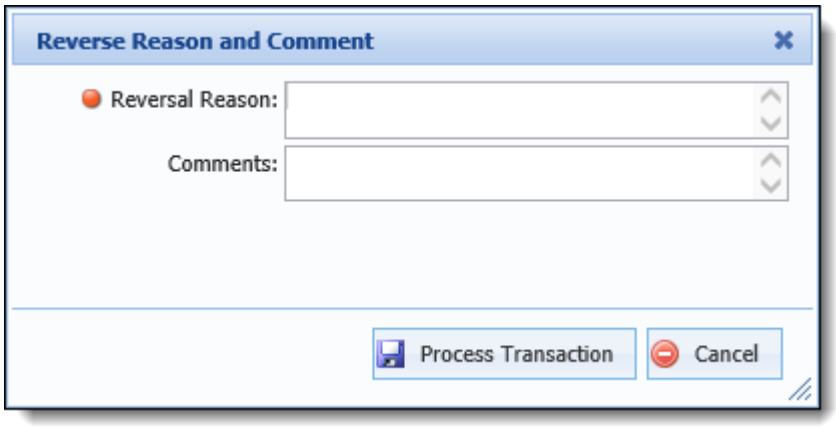
- Navigate to a Cash Flow Details screen that is configured with the Cash Flow Transaction panel.
- Click Add Transaction.
- Complete all the required fields
- If a portion of the transaction amount is to be excluded, click Add Exclusion. A new row is added to the Cash Flow Exclusions panel.
- Click within the Exclusion Type field and select the desired exclusion type from the drop-down list.
- Click within the Exclusion Amount field and enter the amount to be excluded.
- Once all transaction fields have been entered, click Apply Transaction.

To return to the Cash Flow Details screen without applying a transaction, click Cancel.

If an exclusion was mistakenly added, highlight the exclusion that is to be removed and click Remove Exclusion.

Reverse Transactions

End users are able to reverse a previously posted cash flow transaction by clicking Reverse Transaction located at the top of the Cash Flow Transaction panel. When clicked, the Reverse Reason and Comments window opens within the workspace.



The Reverse Reason and Comments window contains the following fields:

Field	Description
Reversal Reason	Allows users to indicate why the transaction is being reversed.
Transaction Comments	Allows users to input additional commentary on the transaction reversal.

Reversing a Transaction

To reverse a transaction:

- Navigate to the Cash Flow Details screen that is configured with the Cash Flow Transaction panel.
- Click Reverse Transaction.
- Enter the Reversal Reason.
- Enter any additional details in the Comments field.
- Once all fields have been entered, click Process Transaction.

> To return to the Cash Flow Details screen without reversing the transaction, click Cancel.

Export Transactions

End users are able to export a .CSV file containing all transactions on a cash flow by clicking Export located at the top of the Cash Flow Transaction panel. When clicked, a message appears asking to open or save the .CSV file. Select **Open** to open the file in Excel, or **Save** to automatically download the file.

Search

Target Audiences

This example is helpful to both system administrators and end-users.

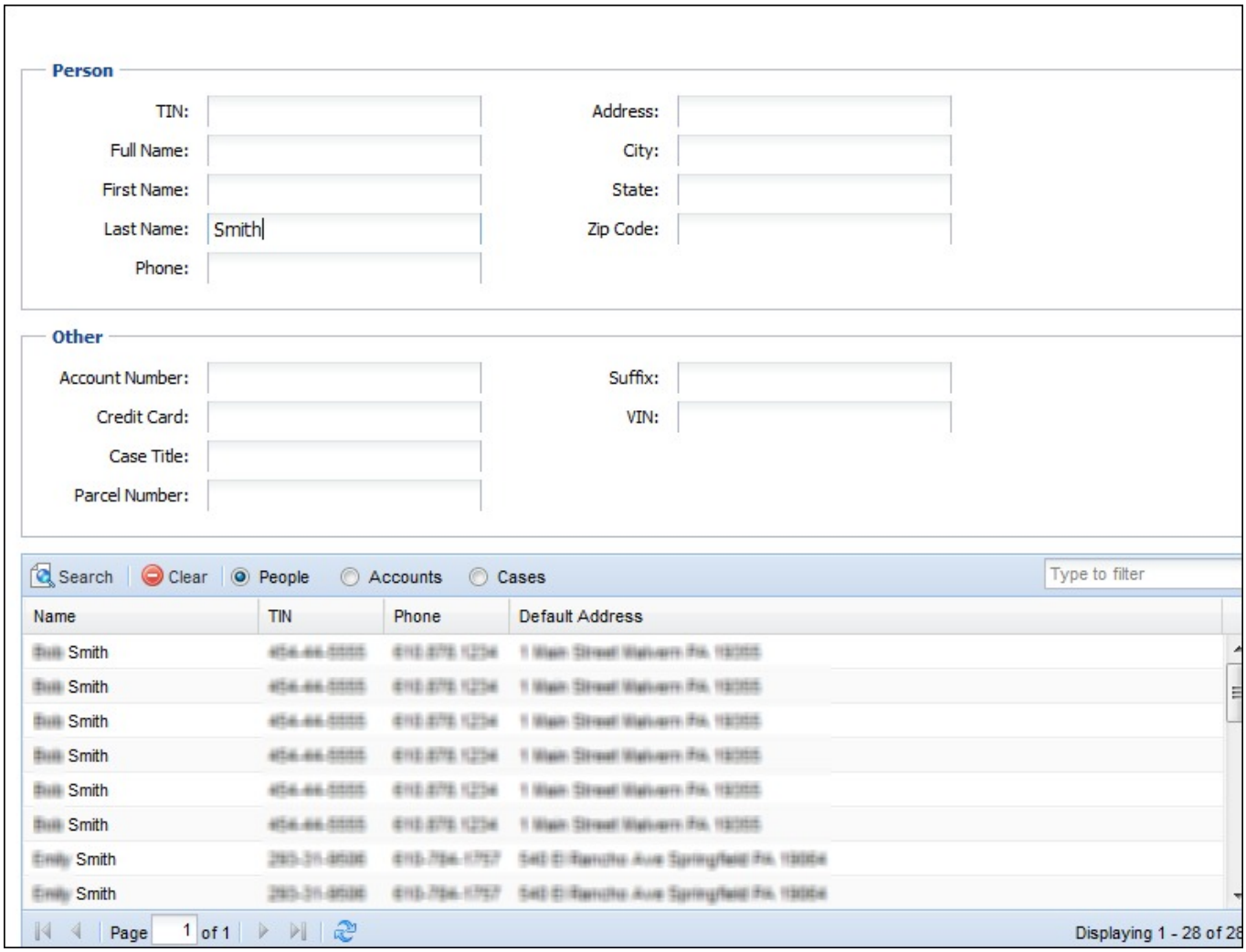
Outcome

This example is to provide end-users with a business case scenario of how users and/or system administrators can search a person or account number. At the end of this example the end user should be able to understand the

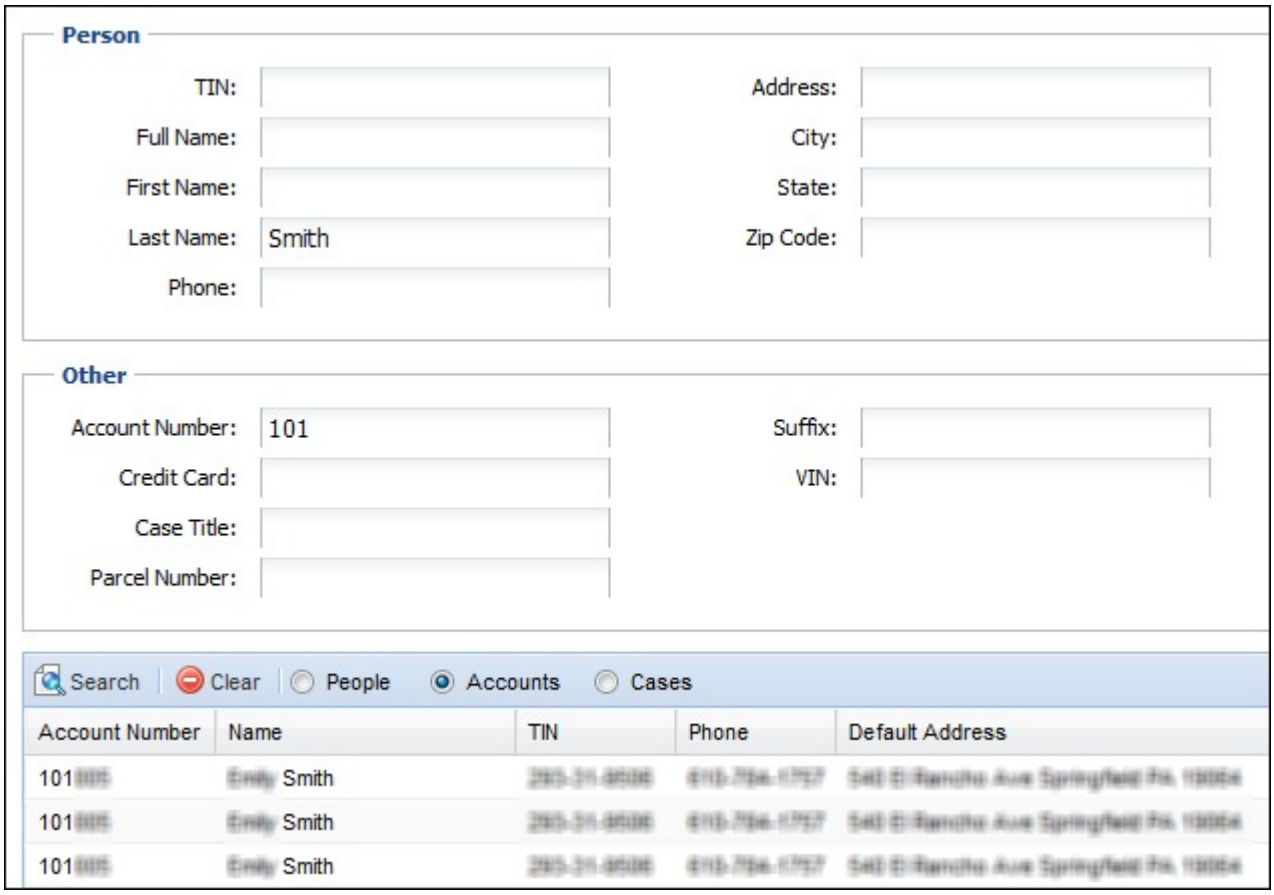
basic search functionality.

Janet Searches for an Account Holder

Janet is a collections agent at XYZ Credit Union. Before she leaves for the day, she comes across a reminder telling her to review an account with the last name of "Smith." She types Smith into the last name field of the Basic Search function and presses Enter on her keyboard.



By default the **People** radio option is selected. The search results displays information related to people with the last name of Smith. Janet realizes there are a lot of people with the last name of "Smith," thus she needs to refine her search. She remembers that the account she needs to open begins with "101" so she types that in the Account Number field and clicks the **Accounts** radio button. She clicks the **Search** button to display accounts related to her search.



With the Account Number displayed, Janet is able to determine the account she needs to review prior to leaving for the day. She double-clicks the account she needs to open in the workspace.

TCPA Consent Status

The Telephone Consumer Protection Act (TCPA) prohibits an auto-dialer from calling or sending SMS messages to cellular phones without consent. To be in compliance with the standards set forth by TCPA, Temenos Infinity supports the ability to set the TCPA Consent status of a person's phone number.

> In some instances, a person may provide a cellular phone number as a home phone number. In these instances, TCPA consent must still be attained.
>
> > A process exists that allows institutions to easily identify cellular phone numbers that were misclassified as home phone numbers. For more information, please see the Phone Number Classification topic in the Administrator Guide.

TCPA Consent Field

The TCPA Consent field is available within the Person Phone panel, and allows users to view and maintain the TCPA Consent status of person's phone number. This field may be set manually by a Temenos user, or automatically through a dialer script or Standard TCPA Import. The TCPA Consent field may have the following values:

Value	Description

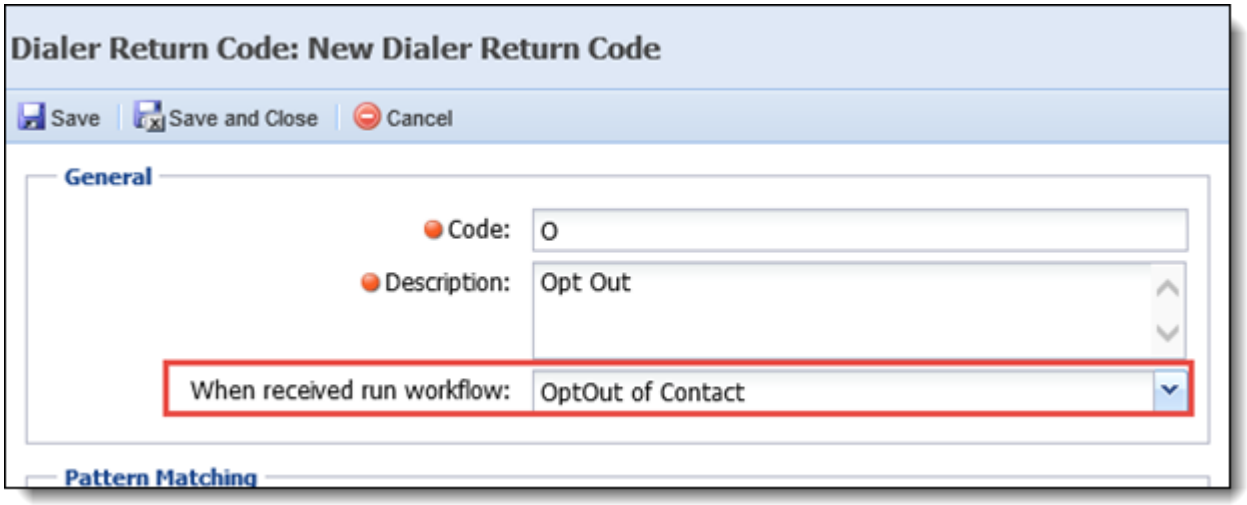
<blank>	An attempt to attain TCPA consent has not been made. By default, the TCPA Consent field is blank.
Yes	Account holder has given consent to contact the phone number.
No	Account holder has denied consent to contact the phone number.
Unknown	An attempt to attain consent was made, but an affirmative response or denial was not received.

To modify this field, navigate to the Person Phone panel. Open the edit screen associated with the Person Phone panel, click within the TCPA Consent field, and select the appropriate consent status. Once a status has been selected, save the edit screen.

Dialers

Phone numbers with a TCPA Consent of No are not included in dialer campaigns. Phone numbers with a TCPA Consent of <blank>, Yes, and Unknown may be included in dialer campaigns. It is up to an institution to configure whether accounts with these responses are included in a dialer campaign.

Financial institutions have the ability to create an OPTOUT dialer return code. The code can initiate a workflow to change a custom field used in queuing logic to restrict accounts from being sent to the dialer.



If an account holder Opts out of future contacts during a dialer campaign, the applicable phone number's TCPA Consent status is set to No and the number is not included in future dialer campaigns.

> The handling of TCPA Consent varies by the dialer used by an institution.

Standard Dialer

The Standard Dialer uses three fields to capture a debtor's TCPA consent: HomeTCPAConsent, WorkTCPAConsent, and MobileTCPAConsent. These fields are included in the Standard Dialer Export Process, if the Include TCPA Consent Indicator parameter is set to True within Temenos Infinity's database.

Custom Dialer

Institutions are able to include the HomeTCPAConsent, WorkTCPAConsent, and MobileTCPAConsent fields in the dialer output file. Institutions are able to modify their dialers to use these fields to prevent calling these numbers going forward.

Genesys

When Genesys calls a debtor, the script executes as outlined in the Script document. Once the script completes, the debtor is prompted to indicate if he or she would like to opt out of future automated calls. If the debtor chooses to opt out, the Genesys workflow has two potential outcomes that depends on whether the script has direct connect enabled on it.

> For more information on how Genesys handles TCPA Consent and customer Opt Outs, please refer to the Genesys connector guide.

TCPA Import

The TCPA Import updates the TCPA Consent status of existing phone numbers within Temenos Infinity based on data provided in an input file. This import is controlled the IMPORT_TCPA_CONSENT process, which is activated and maintained in Temenos Infinity's database.

By default, the IMPORT_TCPA_CONSENT process initiates daily at 6:45 AM; however, the start time and frequency may be updated by a Temenos Customer Care Representative within the database. Additionally, the IMPORT_TCPA_CONSENT process is dependent on the completion of the core payment import processes as well as Profile Import.

If a dependent process fails or exceeds beyond scheduled runtime, the TCPA Import will not initiate and will wait for the completion of the dependent process.

The IMPORT_TCPA_CONSENT process also has two associated process parameters that control specific behavior within the process. These parameters are also maintained in Temenos Infinity's database.

Process Parameter	Description
TCPA_IMPORT_SHARE	The TCPA_IMPORT_SHARE parameter provides the network location where documents will be available for import process.
TCPA_Account_Restrict	The TCPA_Account_Restrict parameter controls the restriction level of the phone number comparisons. This parameter includes the following options: • ACCOUNT - Compares the import file phone numbers to phone numbers that are assigned to an account number. For more information on the direct phone number comparisons, please refer to the Input File Layout and Mapping section below. • PHONE - Compares each phone number in the import file against every phone number within Temenos Infinity. • ACCOUNTLOAN - Compares each phone number in the import file against phone numbers associated with the loans on an account, not just the account itself. The ACCOUNTLOAN option is currently not supported.

Once the import runs successfully, the pipe-delimited file named TCPA_Account_Update_<YYYYMMDD>.txt is archived in the location identified in the TCPA_IMPORT_SHARE process parameter.

Process Exceptions

During this process, the system uses the following logic to evaluate whether or not an exception exists:

If

- TCPA consent status fails to update the database
  OR
- All phone numbers on file record do not exist

Then

- Add record to the exception file.

If the process successfully runs but exceptions exist, all exceptions are written to the TCPAImportExceptions.csv. This file is written in the same format as the original TCPA input file and is saved in the location identified in the TCPA_IMPORT_SHARE process parameter.

For more information on the input file format, please refer to the Input File Layout and Mapping section below.

Within the database, institutions have the ability to configure emails to be sent if an exception has occurred.

Process Failure

The TCPA import will fail if the initial or daily file process fails, or no file is present.

Within the database, institutions have the ability to configure emails to be sent if the TCPA import process fails.

Input File Layout and Mapping

Position	Field Format	Field Description	Field Path	Notes
1	Numeric	Account Number	Account > Account Number	
2	Numeric	Loan Number	Account > Loan Number	
3	Alphanumeric	Variable Field 1		
4	Alphanumeric	Variable Field 2		
5	Numeric	Phone Number 1	• Account > Persons > Phones > Home Phone > Phone • Account > Persons > Phones > Work Phone > Phone • Account > Persons > Phones > Mobile Phone > Phone • Account > Persons > Phones > Other Phone > Phone	Match Phone number against all existing phone numbers within Temenos Infinity.
6	Numeric	Phone Number 2	• Account > Persons > Phones > Home Phone > Phone • Account > Persons > Phones > Work Phone > Phone • Account > Persons > Phones > Mobile Phone > Phone • Account > Persons > Phones > Other Phone > Phone	Match Phone number against all existing phone numbers within Temenos Infinity.

7	Numeric	Phone Number 3	• Account > Persons > Phones > Home Phone > Phone • Account > Persons > Phones > Work Phone > Phone • Account > Persons > Phones > Mobile Phone > Phone • Account > Persons > Phones > Other Phone > Phone	Match Phone number against all existing phone numbers within Temenos Infinity.
8	Alphanumeric	Phone TCPA Consent 1	• Account > Persons > Phones > Home Phone > TCPAConsent • Account > Persons > Phones > Work Phone > TCPAConsent • Account > Persons > Phones > Mobile Phone > TCPAConsent • Account > Persons > Phones > Other Phone > TCPAConsent	Yes/No/Unknown/<Blank> Apply TCPA Consent update against corresponding TCPA Consent status for any phone number match within the system.
9	Alphanumeric	Phone TCPA Consent 2	• Account > Persons > Phones > Home Phone > TCPAConsent • Account > Persons > Phones > Work Phone > TCPAConsent • Account > Persons > Phones > Mobile Phone > TCPAConsent • Account > Persons > Phones > Other Phone > TCPAConsent	Yes/No/Unknown/<Blank> Apply TCPA Consent update against corresponding TCPA Consent status for any phone number match within the system.
10	Alphanumeric	Phone TCPA Consent 3	• Account > Persons > Phones > Home Phone > TCPAConsent • Account > Persons > Phones > Work Phone > TCPAConsent • Account > Persons > Phones > Mobile Phone > TCPAConsent • Account > Persons > Phones > Other Phone > TCPAConsent	Yes/No/Unknown/<Blank> Apply TCPA Consent update against corresponding TCPA Consent status for any phone number match within the system.

Data Purging

The Data Purging page provides system administrators the ability to control Temenos Infinity's database purge process from within System Management (System Management > Data Purging). During the database purge process, rows are deleted from the tables indicated, based on the desired time span.

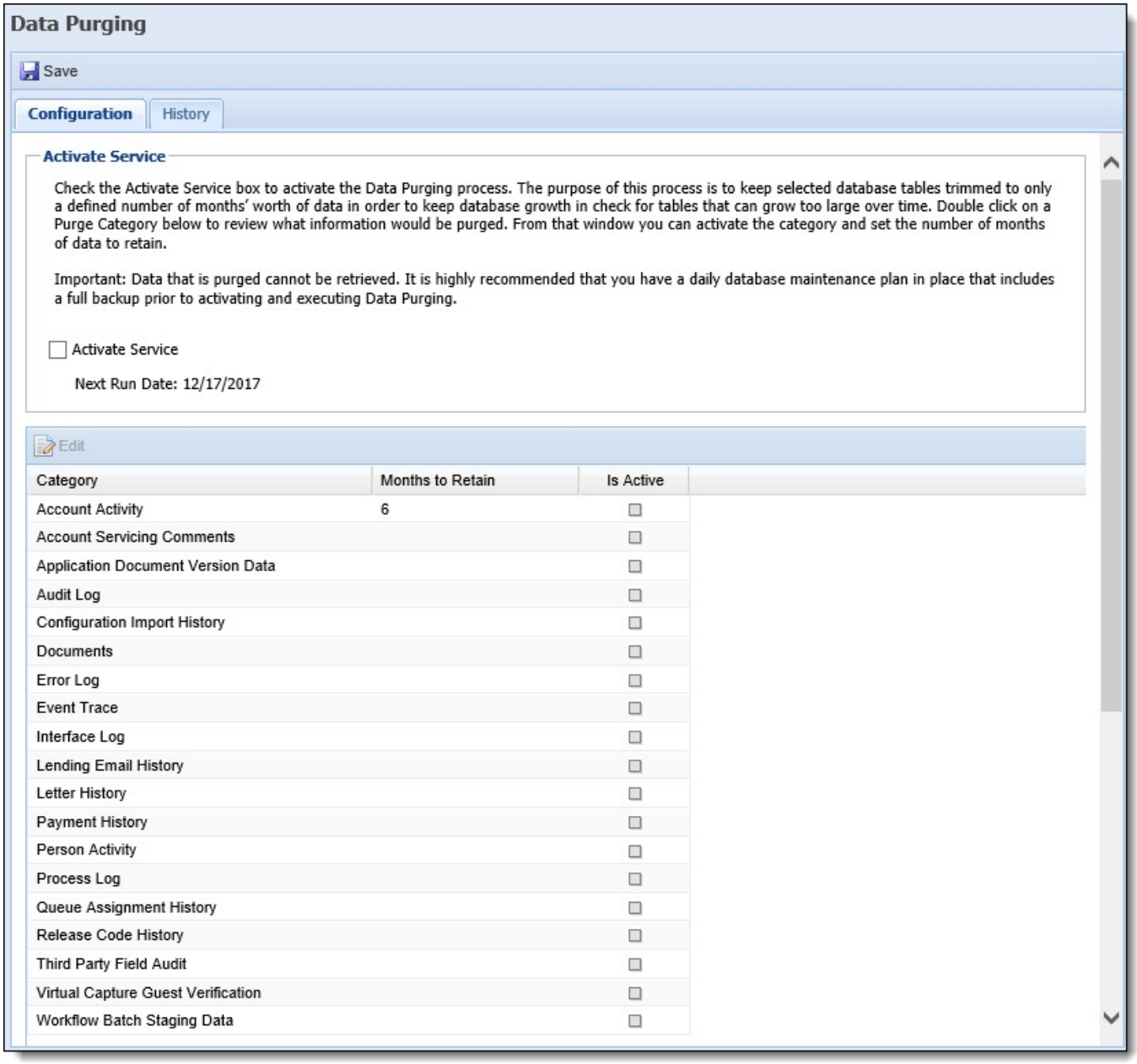
Data Purging Attributes

The Data Purging page includes two tabs:

- Configuration
- History

Configuration

Within the Configuration tab, system administrators are able identify the table categories to be purged from the database, as well as the time span of current data to be retained in the database.



The Configuration tab includes two sections: Activate Service, which allows administrators to enable or disable the data purging capabilities, and the purging options, which allows administrators to identify the data to be purged from the database.

In the Activate Service section, click the **Activate Service** check box to enable or disable the purge service.

- If the Activate Service check box is selected, the purge process runs based on a predefined schedule.

> By default, the purge process executes on Sunday at 1:00 AM. The start time may be configured by updating the DATABASE_CLEANUP process within Server Manager > Processes.
>
> To configure the days on which the DATABASE_CLEANUP process runs, please open a case with Temenos Support.

- If the Activate Service check box is not selected, the purge process does not run on a schedule.

In addition to the activation check box, this section also includes an overview of the data purge process, as well as a date that indicates when the purge process is set to run next.

Beneath the Activate Services section, a configuration grid allows system administrators to view and maintain the data included in the purge process. Within this grid, the following information is available:

Column	Description
Category	Indicates the names of the purge categories available to be included in the data purge. Purge categories are system defined groupings of data tables that are eligible for purging. For more information on categories, please see the list of categories below.
Months to Retain	Indicates the number of current months that the category data is to be retained. For example, if this value is set to 12, all data that is older than 12 months old is purged.
Is Active	Indicates if the purge category is included within the purge process.

Categories

Within the Category column, the following purge categories are available:

Category	Table(s) Included in Category	Description
Account Activity	AccountServicing.AccountActivity	The Account Activity category includes when a user views or works an account in the Person workspace. This data includes the User, the Account, the start date/time, and the end date/time.
Account Servicing Comments	Collections.Comment Collections.CommentMap	The Account Servicing Comments category contains comments added to Persons, Accounts, Cases, Tickets, or Tasks. This data includes system comments, dialer comments, ad-hoc comments, manual comments, and automated comments.

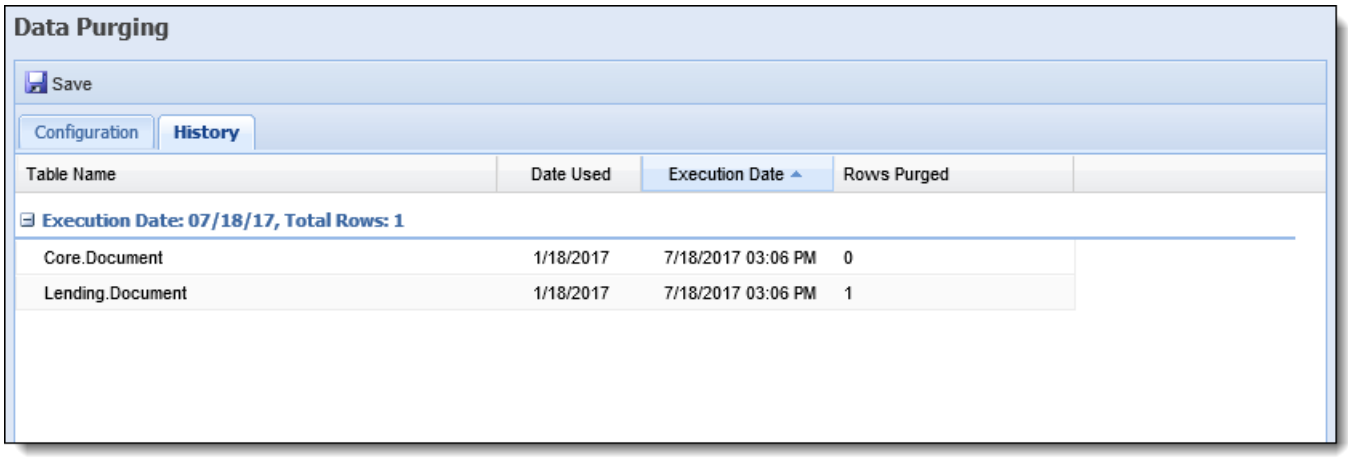
Application Document Version Data	Lending.ApplicationDocumentVersion	The Application Document Version Data category includes document sets that were generated and updated for Origination applications.
Audit Log	Core.AuditLog	The Audit Log category contains changes to auditable fields. This data includes fields for Persons, Accounts, Cases, Tickets, Tasks, Repayment Plans, and Applications.
Configuration Import History	Core.ConfigImportHistory	The Configuration Import History category stores the history row for each Configuration Import portion of the Configuration Export/Import process. This is where configurations can be moved from one instance of Temenos Infinity to another instance that has the same version.
Documents	Core.Document Lending.Document	The Documents category contains the documents attached to origination applications, documents attached to emails, documents from web origination, as well as documents used by third party document providers. This purge deletes the physical documents from the share path on the server. It is recommended that these documents are transferred or copied to an optical system or other location, prior to purging if retention is a concern.
Error Log	dbo.tblErrorLog	The Error Log category stores all errors that have occurred within Temenos Infinity. This includes errors that may be visible to the end user as well as background errors and errors returned from various processes that run.
Event Trace	Core.EventTrace	The Event Trace category records when Actions are triggered based on Events configured through Event Processing. This covers all modules that utilize Event Processing.

Interface Log	dbo.tblInterfaceLog	The Interface Log category stores all communications between Temenos Infinity and the system's Core Processor. This table stores information on the account, as well as the request/response through the interface.
Lending Email History	Lending.EmailHistory	The Lending Email History category includes all emails generated via Event Processing, or by utilizing the Send Email icon within an application.
Letter History	dbo.tblLetterHistory	The Letter History category includes letters generated in Account Servicing that are stored in dbo.tblLetterHistory, and in the share path on the server. This purge also deletes the physical document from the share path.
Payment History	dbo.tblPaymentHistory	The Payment History category stores all payments made on accounts. This includes manual payments, payments from a Core Processor, payments via a Third Party connectors, and payments via a Profile Import.
Person Activity	AccountServicing.PersonActivity	The Person Activity category stores all instances when a user views or works a Person in the workspace. This includes the User, the Person, the Start Date/Time, and the End Date/Time.
Process Log	dbo.tblProcessLog	The Process Log category stores the history of all processes executed within Temenos Infinity, across all Modules. This includes all core and third party imports and exports, as well as processes that execute within the system to update data.
Queue Assignment History	dbo.tblQueueAssignmentHistory	The Queue Assignment History category stores when accounts move in and out of queues. This includes the account, the queue, the dates assigned/unassigned, and beginning/ending Days DQ, DQ Amount, and Balance.

Reason Code History	dbo.tblReleaseCodeHistory	The Reason Code History category records when a dialer import runs, and a return code from the dialer attempt has a matching Dialer Return Code in Temenos Infinity.
Third Party Field Audit	dbo.tblThirdPartyFieldAudit	The Third Party Field Audit category identifies the third party that provided the updated data, the applicable Person/Account, the field, the original/new values, and the date the information was provided.
Virtual Capture Guest Verification	Lending.VCGuestVerification	The Virtual Capture Guest Verification category stores a listing of each attempt an applicant makes to use the Guest Verification process in Virtual Capture.
Workflow Batch Staging Data	dbo.tblWorkflowBatchStaging	The Workflow Batch Staging Data category contains a listing of identifiers for accounts that have had batch workflows executed against them via various methods (Batch Workflow, Automated Workflow, Dialer Return Code workflows/pattern matching, etc.). Purging this table does not delete any workflow history visible in Temenos Infinity.

History

The History tab allows administrators to review the results of data purges that have completed.



> The History tab retains the data purge results of the last six months. After six months have passed, purge results are removed from the History tab.

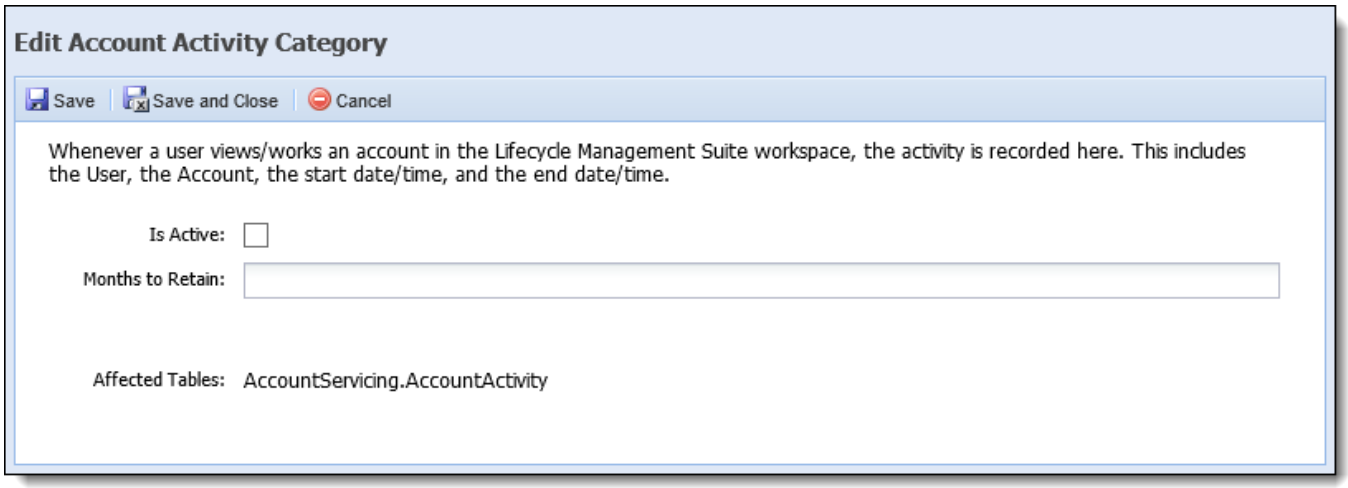
Within this tab, completed purge data populates within a grid containing the following columns:

Column	Description
Table Name	Indicates the names of the purge categories included in the data purge.
Date Used	Indicates the date value used to determine which records should be purged.
Execution Date	Indicates the date and time the purge process executed.
Rows Purged	Indicates the number of rows that were purged from a table during the process.

For each data purge that occurs, a new entry populates within the grid. Each entry displays a summary of information containing the date when the process executed, as well as the number of rows purged by the process. By default, each entry is collapsed within the grid. To expand the entry, click [+]. To collapse an entry, click [−].

Data Purge Category Activation

To activate a category for the purge, double-click on the category row or highlight the row and click [Edit]. The Edit Category screen opens in the workspace.



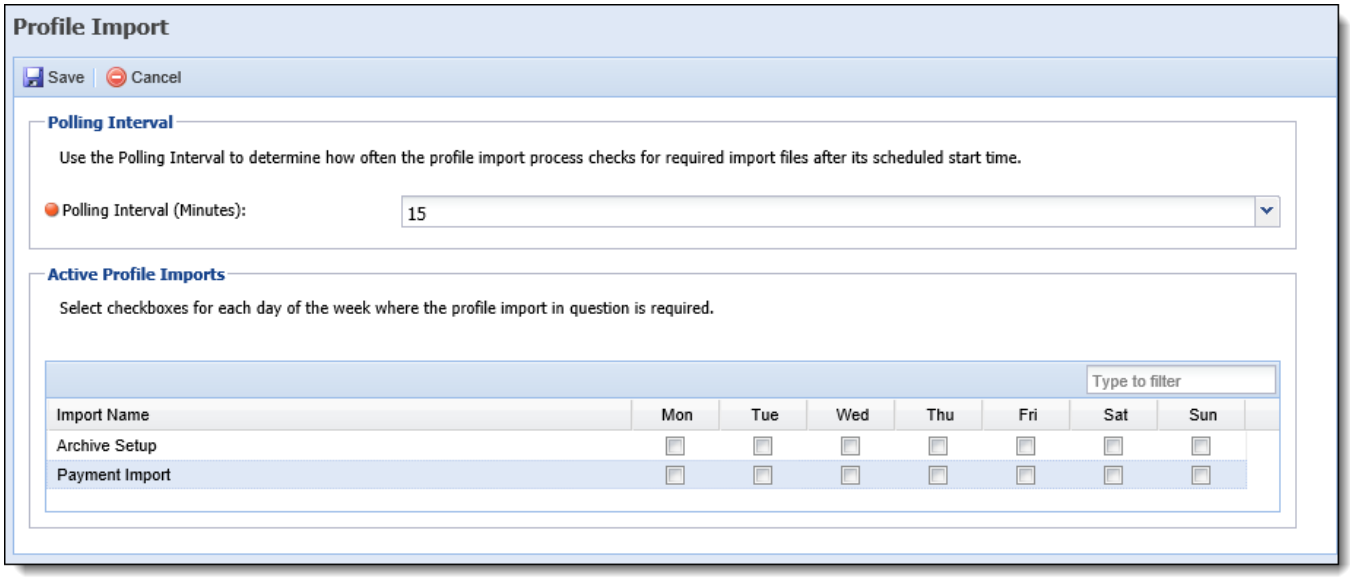
Within the Edit Category screen, system administrators are able to receive an overview of the purge category as well as activate and identify the number of months to be retained.

Field	Description
Is Active	A check box that allows system administrators to include and exclude a category from the purge process. • Select the check box to include the category in the purge process. • Clear the check box to exclude the category from the purge process. By default, this check box is not selected.

Months to Retain	Enter the number of months that the category data is to be retained. For example, if this value is set to 12, all data that is older than 12 months old is purged
Affected Tables	Read-only field that identifies the table(s) included in the category.

Profile Import

The Profile Import configuration page provides institutions the ability to configure active profile imports in Temenos Infinity. To access the Profile Import configuration page, navigate to System Management > Collections > Profile Import.



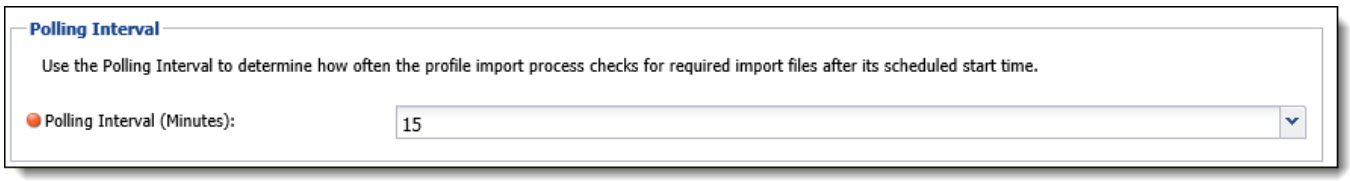
This page is comprised of the following sections:

- Polling Interval
- Active Profile Imports

Polling Interval

The Polling Interval section allows institutions to determine how often the profile import process checks for the required import files, after the profile's scheduled start time.

> The profile import process is only able to complete when all specified files for the day are available to be imported.

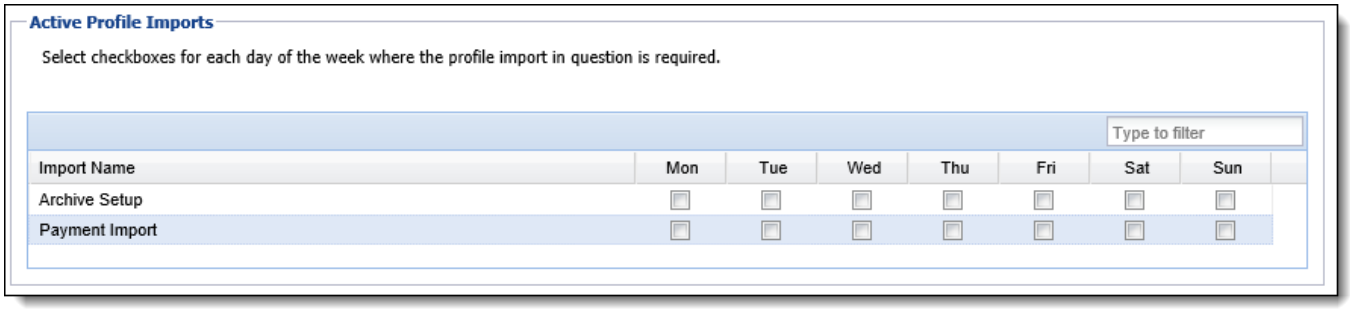


Within the Polling Interval field, use the drop-down list to identify the number of minutes that the process checks for the required import files.

> The profile import process continues to look for the files until the MaxWaitSec parameter in the database is reached. This parameter defaults to 14400 seconds (4 hours).

Active Profile Imports

The Active Profile Imports section contains a grid that lists out all active profile imports. Within this grid, administrators are able to view and identify on which days the profile import is required.



Select the check boxes associated with each day the profile import is required

> The Profile Import user/sercurity group permission must be set to Change in order for a user to be able to make updates on the Profile Imports configuration page.

Once the Polling Interval and days are identified, click

to retain the profile import settings

Profile Import Process

The Profile Import process checks whether the profile import is required for the current day of the week.

- If True, the profile import will not successfully complete until all the required files have been processes.
  - If the required files are not available, the profile import process checks back at the identified Polling Interval after the initial start time, until all files are available, or the MaxWaitSec has been reached.
  - Once all required imports have at least one available file, the imports runs in the profile import execution order.
- If False, the profile import runs at its scheduled start time, skips any files that are unavailable for import, and completes successfully after processing the available files.

How To Guides

Temenos provides the following "How To Guides" that depict processes and configurations allowing institutions to attain desired functionality. In some cases, a how to guide may provide a work-around for known design gaps currently being resolved.

The following how to guides have been provided for the Account Service, modules:

Title	Description
How to Create Screen Interactions	This topic provides administrators an overview of the screen interactions functionality, as well as business examples that depict how to create interactions for screens.

How to Create Screen Interactions

Temenos Infinity's Screen Designer allows institutions to create Interactions, which allows institutions to configure the conditions in which a screen's fields and panels are hidden in the workspace.

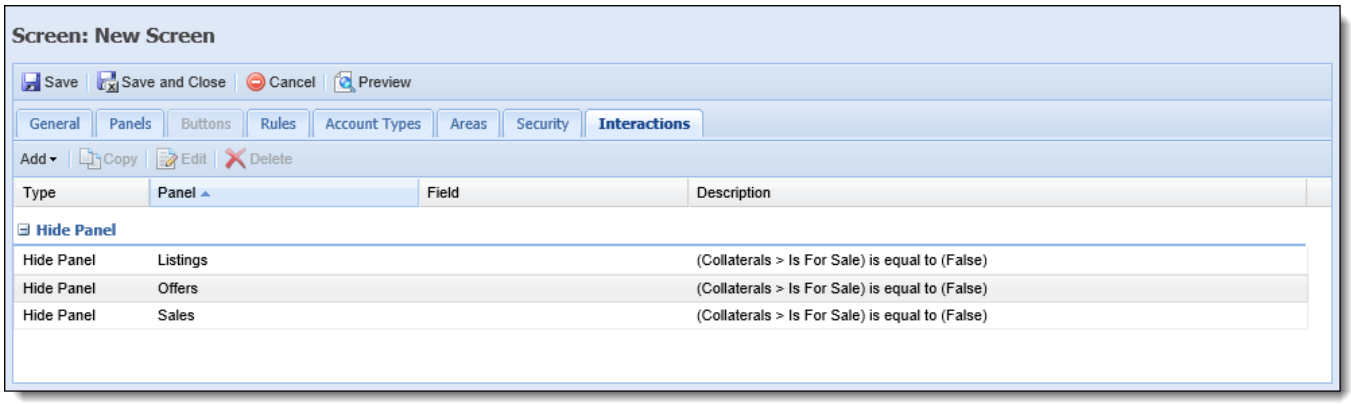
This How To Guide contains the following topics to help administrators configure the conditions in which a screen's fields and panels are hidden from the workspace:

- Interactions Tab Overview
- Business Example
  - Hide Panel Interactions
  - Hide Row Interactions
  - Validate Field Interactions

Overview

To create field and panel hide conditions, navigate to System Management >Screens.

While creating or editing a screen, select the Interactions tab.



Screen interactions are created and maintained using the following action buttons:

Button	Description

Add	Allows the administrator to create a new Interaction. Clicking Add displays a drop-down list, which allows the administrator choose from the following Interaction Types:

Interaction Type	Description
	Allows the administrator to determine the factors used to calculate the values that populate in a field. Condition Logic Each Calculate Field interaction must contain the following components: • A field to be calculated • Calculation logic Conditions are optional. Calculated fields are read-only, and only the interaction is able to update their values.
Hide Field	Allows the administrator to determine the conditions in which a field is hidden on a panel. Condition Logic Each Hide Field interaction must contain the following components: • A field to be hidden • At least one group of conditions • At least one condition in each group
Hide Panel	Allows the administrator to determine the conditions in which a panel is hidden on a screen. Condition Logic Each Hide Panel interaction must contain the following components: • A panel to be hidden • At least one group of conditions • At least one condition in each group

	Hide Row	Allows the administrator to determine the conditions in which a row is hidden within a user-defined grid panel. ▶ Condition Logic Each Hide Row interaction must contain the following components: • A panel to be evaluated for hide conditions. • At least one group of conditions • At least one condition in each group Every row within the selected panel is evaluated by the Hide Row conditions. When the condition is True, the row is hidden. The Related Accounts and Related Tickets panels do not support Hide Row interactions. If a Hide Row interaction exists on an Addresses, Emails, or Phones panel, the interaction takes precedence over the Hide Duplicates filter.
	Field Validation	Allows administrators to determine the conditions in which the value entered in a field is invalid. ▶ Condition Logic Each Field Validation interaction must contain the following components: • A field to be validated • At least one group of conditions • At least one condition in each group A validation message is not required; however, it is recommended as the message provides end users useful information, when the field's value is invalid. Validation occurs in real-time and does not require Save or Save & Next to be clicked.
Copy	Allows the administrator to copy an existing interaction.	
Edit	Allows the administrator to edit an existing interaction.	
Delete	Allows the administrator to delete an existing interaction.	

The following attributes are defined within the grid that displays in the Interactions tab:

All interactions for a screen are grouped together by type. Users are able to expand a grouping by clicking ⊞ and collapse a grouping by clicking ⊟.

Attribute	Description

Type	Identifies whether the interaction Type is Calculate Field, Hide Field, Hide Panel, Hide Row, or Field Validation.
Panel	The value within the Panel attribute is determined by the interaction type: • For Calculate Field interactions, the Panel attribute indicates the name of the panel that contains the field being calculated. • For Hide Field interactions, the Panel attribute indicates the name of the panel that contains the field to be hidden. • For Hide Panel interactions, the Panel attribute indicates the panel to be hidden. • For Hide Row interactions, the Panel attribute indicates the name of the panel to be evaluated for hide conditions. • For Validate Field interactions, the Panel attribute indicates the panel where the field being validated is located.
Field	The value within the Field attribute is determined by the interaction type: • For Calculate Field interactions, the Field attribute indicates the field being calculated. • For Hide Field interactions, the Field attribute indicates the field to be hidden. • For Hide Panel interactions, the Field attribute is blank. • For Hide Row interactions, the Field attribute is blank. • For Validate Field interactions, the Field attribute indicates the field being validated.
Description	For Calculate Field Interactions, this column indicates the formula used to calculate the value of the field. For all other Interaction Types, this column, indicates the interaction condition(s).

To access the condition and expression builder, click Add, Copy, or Edit. Within the condition and expression builder, administrators are able to identify the item to be hidden, as well as the condition(s) that must be met for the interaction to occur.

Upon clicking Add, administrators are presented with a selection window.

> If editing an existing interaction, administrators bypass the selection window, and are taken directly to the condition and expression builder.

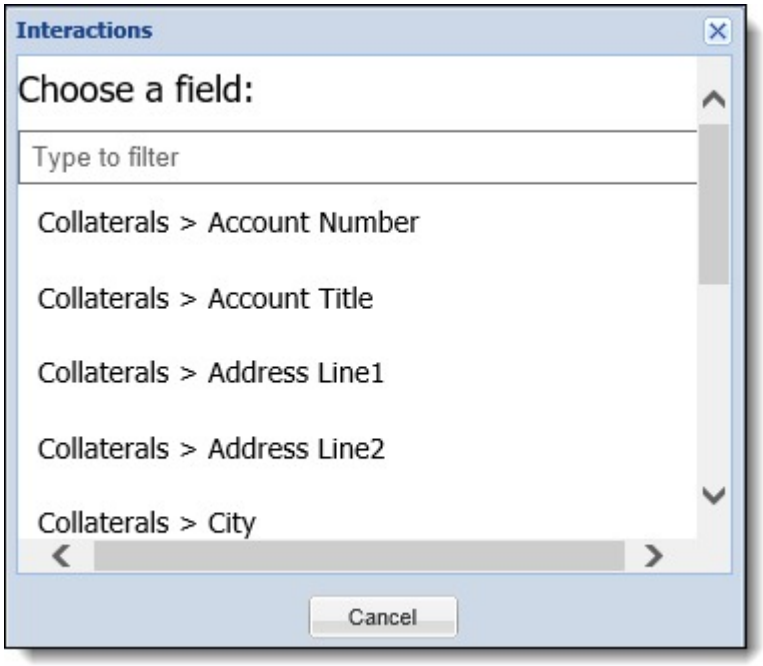
This window allows the administrator to:

- Choose the field to be calculated.
- Choose the field or panel to be hidden if the interaction conditions are met.
- Choose the panel that should have rows hidden if the interaction conditions are met.
- Choose the field to be validated by the interaction conditions.

A separate selection window is presented for each interaction type. Reference the table below for an overview of the values that appear in the selection window for each interaction type:

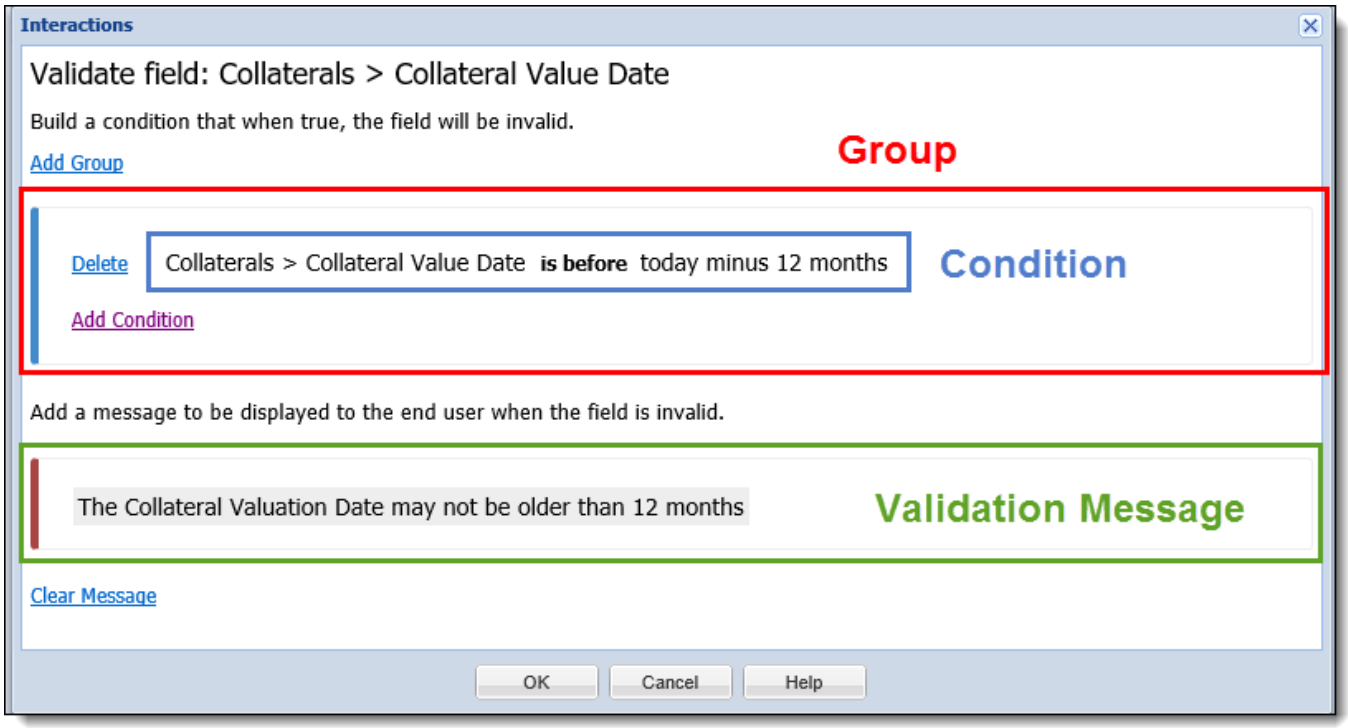
Interaction Type(s)	Selection Window Values
Calculate Fields, Hide Field, or Validate Field	The Choose a Field window appears with a list of all fields configured to appear in each user-defined panel assigned to the screen. Fields are listed in the following format within the window: (Panel Label > (Field Label).
Hide Panel	The Choose a Panel window appears with a list of all panels assigned to the screen. If there are no user-defined grid panels assigned to the screen, the Choose a Panel window appears blank.
Hide Row	The Choose a Panel window appears with a list of each user-defined grid panel assigned to the screen.

For example, if Hide Field is selected, the following window appears to determine which field should be hidden when conditions are met in the application:



The criteria defined within the condition and expression builder is comprised of the Calculations, Groups, Conditions, and Validation Messages.

The condition and expression builder also contains instructions, which provide users helpful information for creating screen interactions.



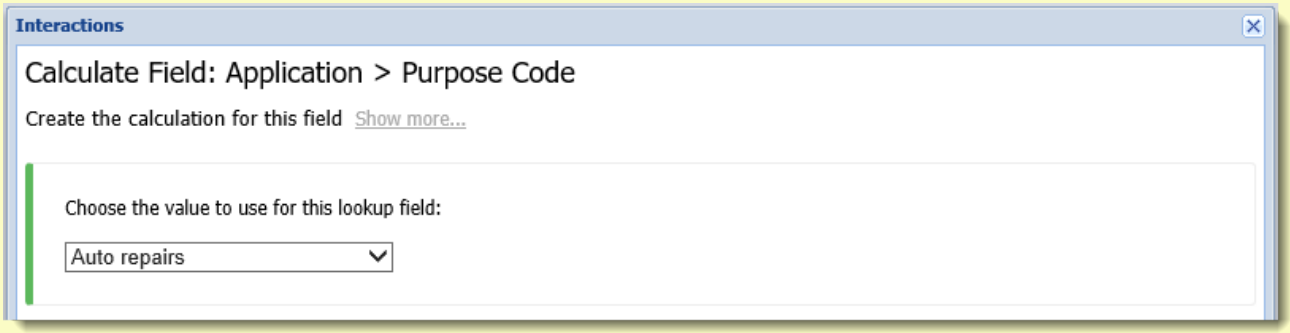
Calculations

A calculation is an expression that calculates the value which populates within any field assigned to the screen. The calculation executes, when the screen loads in the workspace. If any data included in the calculation changes, the calculation executes. For example, if Application > Requested Amount is included in the expression, and the applicant increases the Requested Amount,the calculated field updates accordingly.

Calculated fields are read-only, and only the interaction is able to update their values.

The field being calculated does not appear in the field and function menu.

If a lookup field is selected to be the calculated field, a calculation expression builder does not appear. The interaction only allows users to set the value of the field, and a drop-down field is presented that includes the lookup values for the field.



Click Clear Calculation to remove any calculation logic that currently exists for the interaction.

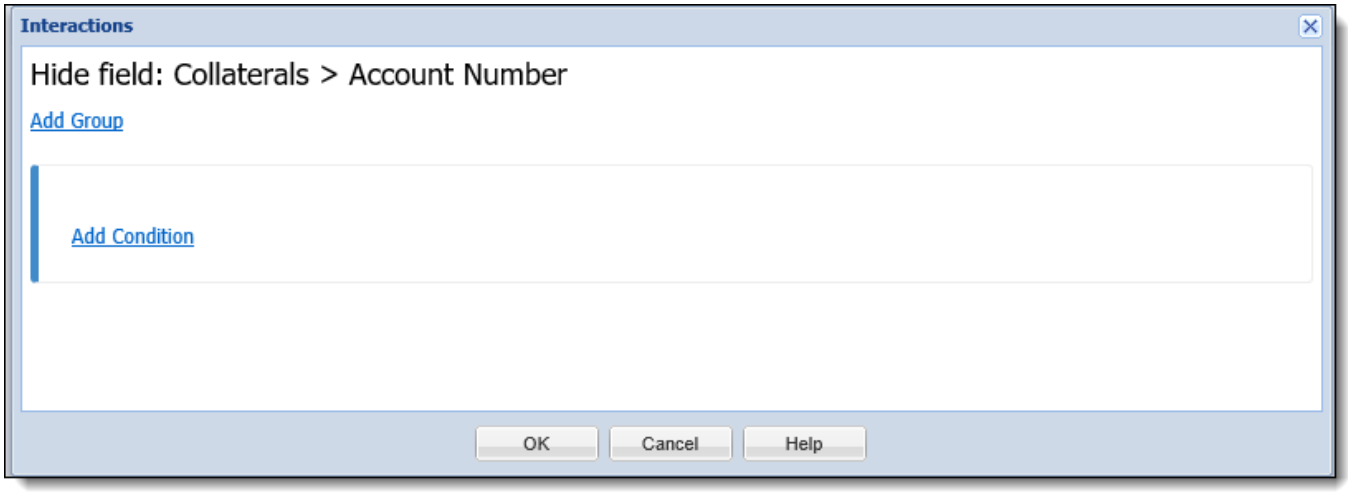
Groups

A group is a group of conditions. At least one Group must be defined. Each Group contains one or more Condition that is administrators can define one or more groups that may contain multiple conditions. If an interaction contains multiple groups, each group may be linked with an AND/OR relationship.

> A screen interaction mat contain an unlimited number of groups, and each group may contain an unlimited number of conditions.

Click Add Group to begin authoring the hide condition(s). Once clicked, a new group is added to the Interactions pop-up window.

> When creating a new interaction, one group is automatically added.



Within each group, administrators are able to perform the following actions:

Action	Description
Add Condition	Allows administrators to add an interaction condition to the group. Upon clicking this button, a new condition is added to the group. When a new condition is added, the first field available in the screen populates in the left expression. Click on the left expression to open the field and function menu. If a group contains multiple conditions, each condition may be linked with an AND/OR relationship. By default, the relationship is set to an AND relationship. Click on the AND to change it to OR.
Delete	Allows administrators to delete a condition from the group. Upon clicking this button, the condition is removed from the group.

Conditions

A condition is comprised of two expressions (a left and a right) that are linked by a relationship operator.

Expressions

An expression is a calculation that returns a single value. Each expression can be comprised of one or more tokens, which may include a mixture of manually entered data, operators, fields, and functions. The following example contains seven tokens:

1 + Collaterals > Collateral Type + 5 + the left 4 characters of Collaterals > Account Number

- Two manually pieces entered data (1, 5)
- Three operators (plus signs)
- One field (collateral type)
- One function (the left 4 characters of Account Number)

When building an expression, the following navigation capabilities are available:

- Click within an expression to select a token.

  The arrow keys cannot be used to navigate through the field/function menu.

- Click on a field or function with the mouse to bring up the menu.
  - Clicking on a field opens the field and function menu.
  - Clicking on a function opens the function configuration window.
- Clicking the tab or right-arrow key to focus the next token.
- Clicking the shift-tab or left-arrow key to focus the previous token.
- Clicking the home key to highlight the first token.
- Clicking the end key to highlight the last token.
- Clicking an operator key to automatically enter the value and advance to the next token.
- Clicking the equal sign to bring up the field or function menu.
- Clicking the backspace/delete key to clear the field, function, or operator from the current token or remove the last character that was manually entered.
- Clicking the backspace/delete key on an empty token to remove the token and highlight the previous token.

Additionally, the following keys are supported for data entry:

Keys	Description
Letters	All upper and lowercase letters from A to Z
Numbers	All numbers 0-9
Space	The space bar
(	Begin grouping
)	End grouping
+	Add
-	Subtract
*	Multiply
/	Divide
\	Forward slash
.	Period or decimal
=	Equal sign
!	Exclamation
@	At symbol

#	Number sign, pound sign, hashtag
$	Dollar sign
%	Percent
^	Caret
&	And symbol, ampersand
,	Comma
<	Less than
>	Greater than
?	Question mark

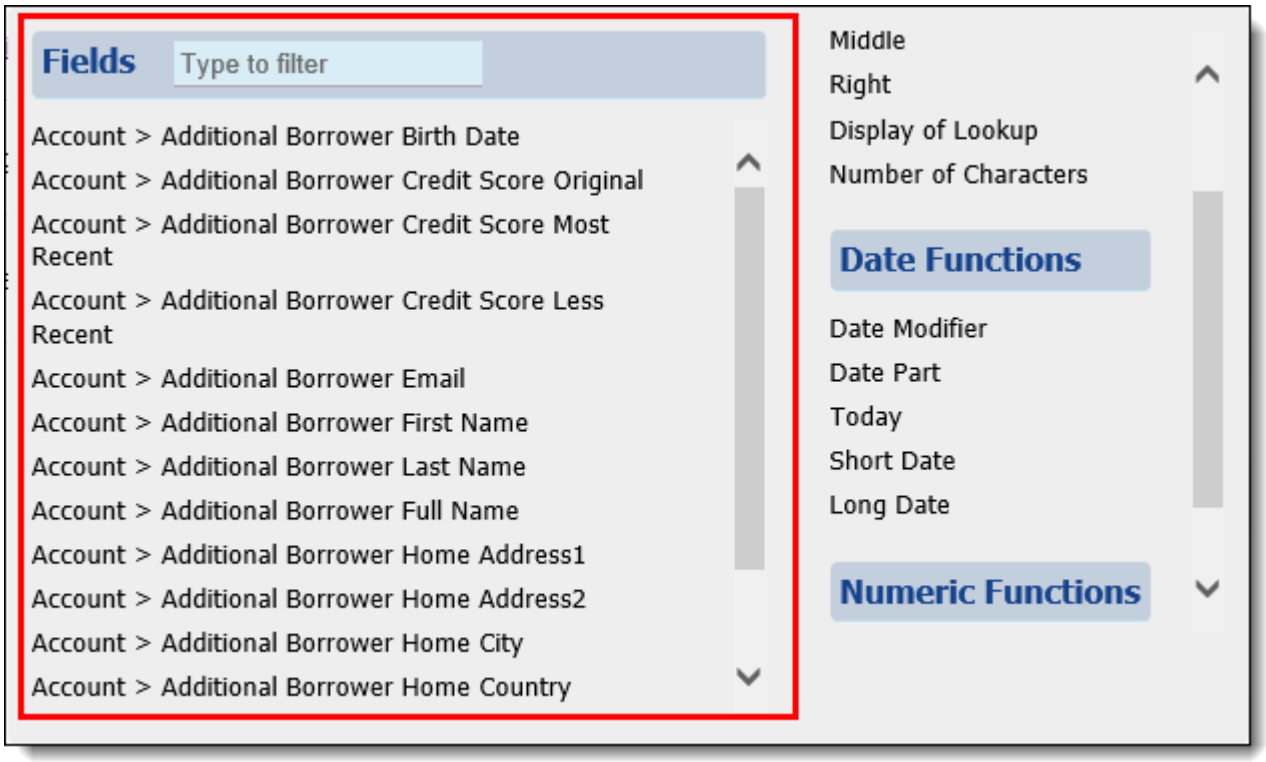
Expressions are validated as they are authored. Invalid tokens are highlighted in red and the errors are indicated in a tooltip when the cursor hovers over the exception.

List of Validation Error Messages

- The first token must be text, field, function or open parenthesis
- The last token must be text, field, function or close parenthesis
- The number of open parentheses must match the number of close parentheses
- Text must be followed by operator, close parenthesis
- Field must followed by operator, close parenthesis
- Function must be followed by operator, close parenthesis
- Operator must be followed by text, field, function, open parenthesis
- Open Parenthesis must be followed by text, field, function, open parenthesis
- Close Parenthesis must be followed by operator, close parenthesis

Fields

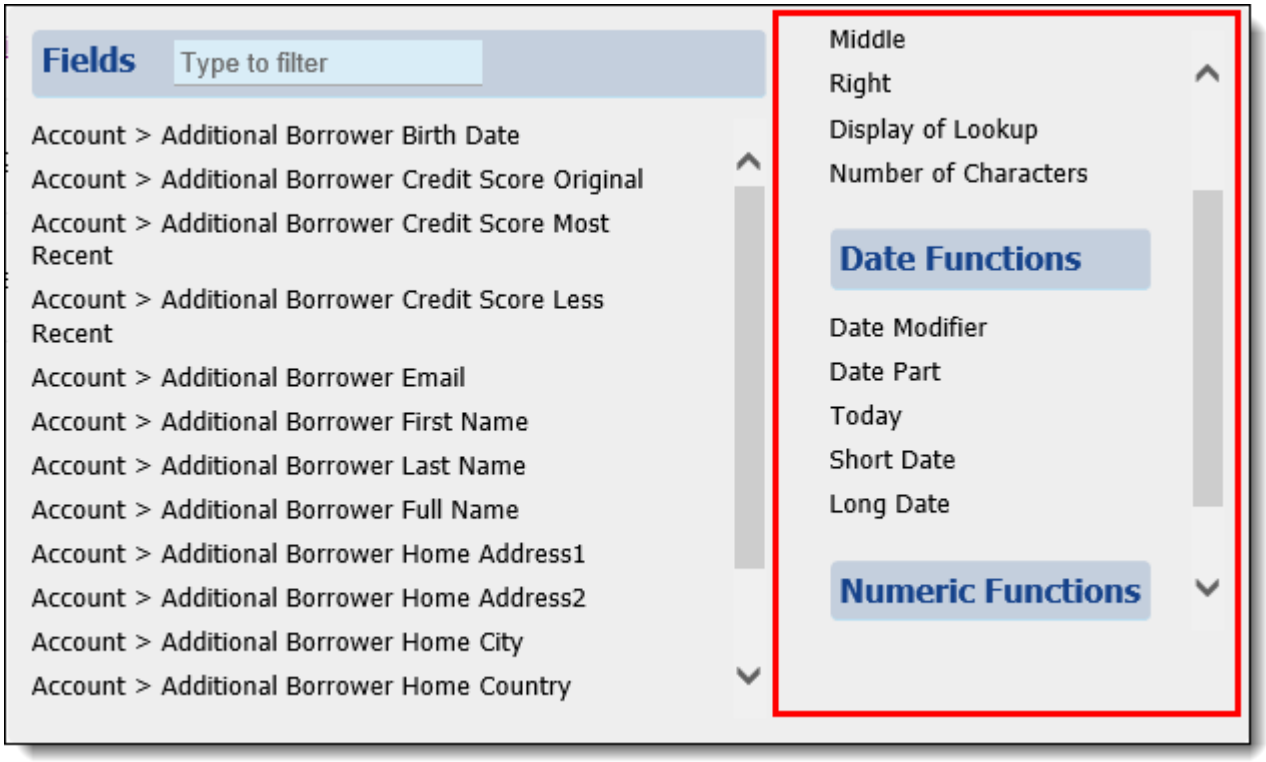
When authoring an expression, administrators may select a field from the left side of the field and function menu. The fields available within this list are limited to those that are assigned to the screen.



The fields displayed within the fields list include the fields assigned to panels that are always hidden.

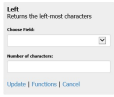
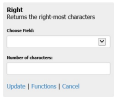
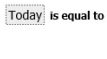
Functions

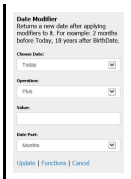
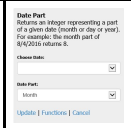
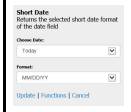
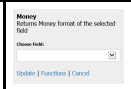
A Function is a token that uses one or more inputs to produce a single value. The following functions appear on the right side of the field and function menu:



If a function, such as Today, does not require an input, a dialogue box opens in which the function can be

configured. Review the following table for an overview of the functions available within the condition and expression builder:

Function Name	Description	Function Logic and Inputs	Function
String			
Contains	Returns true or false, given whether the field contains the entered characters. To return true, the entered characters must exist in the field exactly as typed (case sensitivity is ignored).	Contains (b) within (a) a. Field b. Characters	
Left	Returns the left-most characters.	The left (b) characters of (a) a. Field b. Number of characters	
Middle	Returns a portion of the string with a given starting point and length.	The middle (c) characters of (a), starting with. a. Field b. Start c. Length	
Right	Returns the right-most characters.	The right (b) characters of (a) a. Field b. Number of characters	
Display of Lookup	Returns the display of the lookup field.	Choose the lookup field.	
Number of Characters	Returns the number of characters in the given field.	The number of characters in (a). a. Field	
Date			
Today	Returns today's date.	Today The Today function does not require any inputs to be configured; therefore, a pop-up window does not open.	

Date Modifier	Returns a new date after applying modifiers to the original date. For example: Today minus 2 months, or BirthDate plus 18 years.	(a)(b)(c)(d) a. Field or Today b. + or - c. Value d. Month, Day, Year	
Date Part	Returns an integer representing a part of a given date (month, day, or year). For example: The month of 4/1/77 is 4.	The (b) of (a) a. Field/Today b. Month, Day, Year	
Short Date	Returns the selected short date format of the date field.	Choose the date field. Choose the format: • MM/DD/YY • YY/MM/DD • MM/DD/YYYY • YYYY/MM/DD	
Long Date	Returns the long date format of the selected date field.	Choose the date field.	
Numeric			
Money	Returns the money format of the selected field.	Choose the field.	
Decimal	Returns the decimal format of the selected field.	Choose the field. Enter the number of decimal places.	

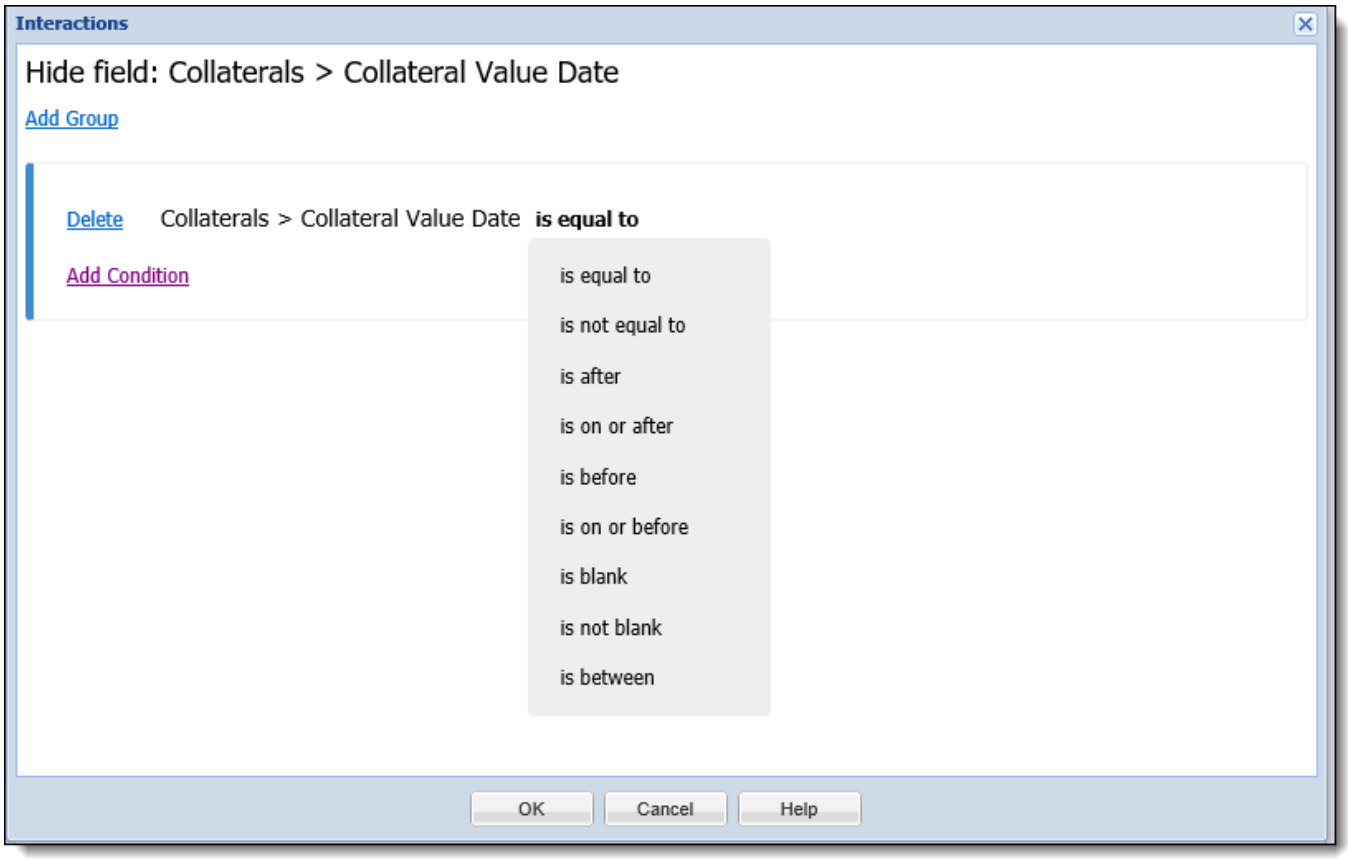
When a calculated field requires formatting, an empty field must be created to hold the calculated value, and the formatting needs to be applied to the empty field.

Upon selecting a function, the corresponding pop-up window opens. Within the function pop-up window, administrators are able to set the inputs to the desired values. In addition to setting the inputs, administrators are able to perform the following actions:

Action	Description
Update	Saves the selections made in the function's pop-up window and returns the administrator to the condition and expression builder.
Functions	Closes the function's pop-up window, discards all selections, and returns the administrator to the field and function menu
Cancel	Closes the function's pop-up window, discards all selections, and returns the administrator to the condition and expression builder.

Relationship Operator

The relationship operators available in a condition are based on the left expression's data type. For example, in the following image, the left expression is a date field and operators available are limited accordingly.



Refer to the following matrix for an overview of the relationship operators available with each data type:

Operator	Data Type				
	Booleans	Dates	Strings	Lookups	Numerics
Is equal to	✓	✓	✓	✓	✓
Is not equal to		✓	✓	✓	✓
Is greater than			✓		✓
Is greater than or equal to			✓		✓
Is after		✓			
Is on or after		✓			
Is less than			✓		✓
Is less than or equal to			✓		✓
Is before		✓			

Is on or before		✓			
Is blank		✓	✓	✓	✓
Is not blank		✓	✓	✓	✓
Is between		✓			✓

Reference the following list for an overview of information to consider for specific interactions and/or functions:

- When authoring conditions that use a lookup field, administrators are able to select multiple options within the pop-up window. Click each value to be included in the condition. Once selected, a check mark appears next to the item
- Hidden panels consume no space within a screen. If a screen is configured as one column, and contains a Hide Panel Interaction, panels shift up to consume the space of the hidden panel. If a screen is configured to include multiple columns, and contains a Hide Panel Interaction, panels shift to the left to occupy the space of the hidden panels; however, the panels that appear in subsequent rows do not wrap up to occupy the space, thus causing blank spaces in a screen.
- Hidden fields consume no space within a panel. If a one-column panel is configured on a screen containing a Hide Field Interaction, fields shift up to consume the space of the hidden field. If a multiple-column panel is configured on a screen containing a Hide Field Interaction, fields shift to the left to occupy the space of the hidden fields; however, the fields that appear in subsequent rows do not wrap up to occupy the space, thus causing blank spaces in a panel.
- When creating a Calculate Field interaction, the condition identifies when the field should be calculated. If the condition is true, the field is calculated. If the field should always be calculated, do not include a condition.
- If the Is Equal To or Is Not Equal To operators are used in a condition that includes a Number of Characters string function, the system automatically evaluates the defined value as a number.
- Though the Is Blank and Is Not Blank operators are available for a Number of Characters string function, the operators are not applicable when using the Number of Characters function to evaluate a text field. If a text field is NULL, the count of characters returns as a "0," rather than NULL.

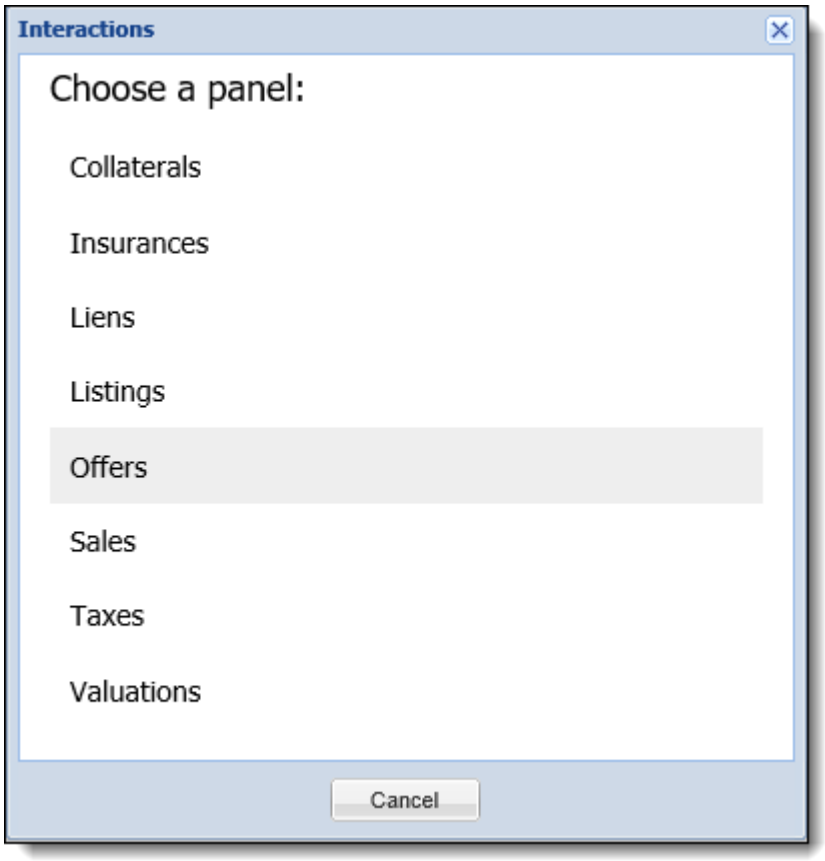
Business Example

Hide Panel Condition

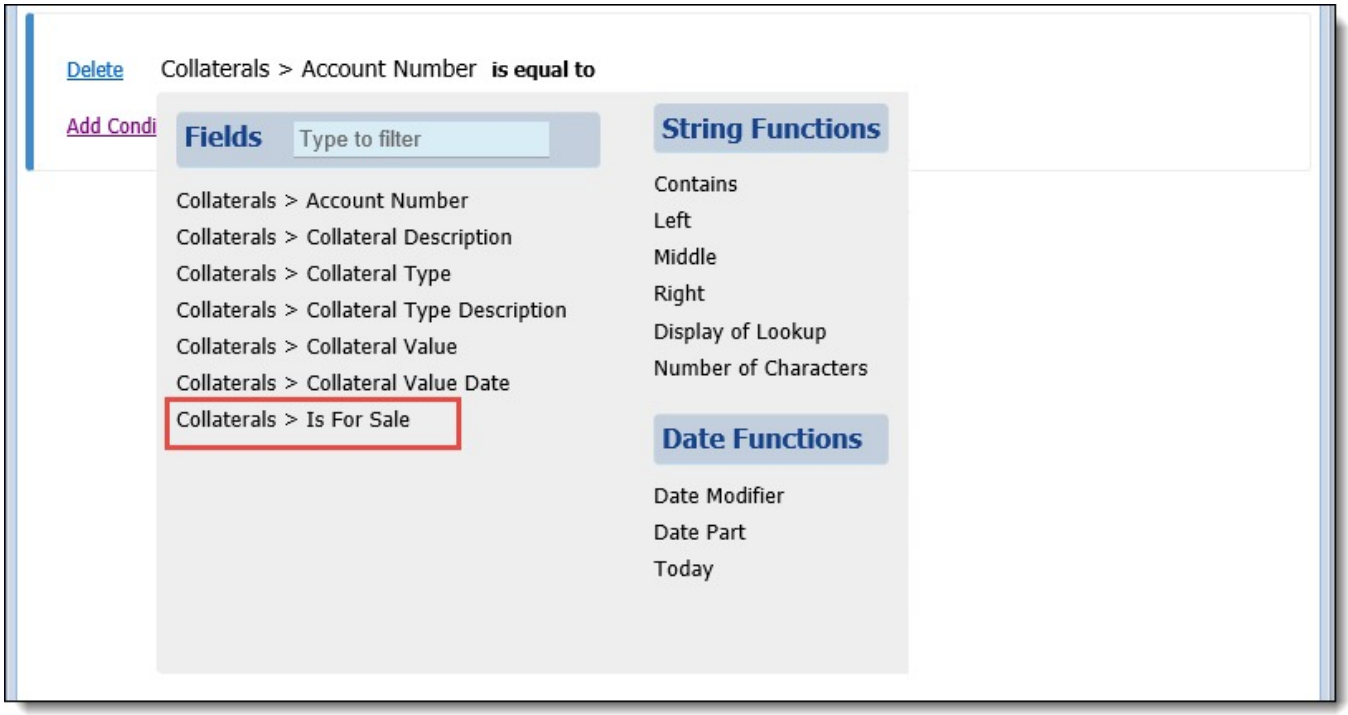
The following example demonstrates how to create an interaction that hides the Offers panel, if a collateral is not for sale.

> The following example assumes that an Account Collateral screen has been created with the Offers panel, as well as a Collaterals panel that includes the Is For Sale field.

Navigate to the Interactions tab, click Add, and select Hide Panel. Within the Interactions pop-up window, select Offers.



Once the Offers panel has been selected, the Interactions pop-up window closes, and the Condition and Expression Builder appears. Click Add Condition to begin authoring the conditions that hide the Offers panel. Click on the first token (Collaterals > Account Number) to open the field and function menu. Within the field menu, select Collateral > Is For Sale.



The field and function menu closes, and the first token displays Collaterals > Is For Sale. The relationship operator automatically updates to display **is equal to**, and the right expression updates to display **True**. Click on True to

change it to **False**.

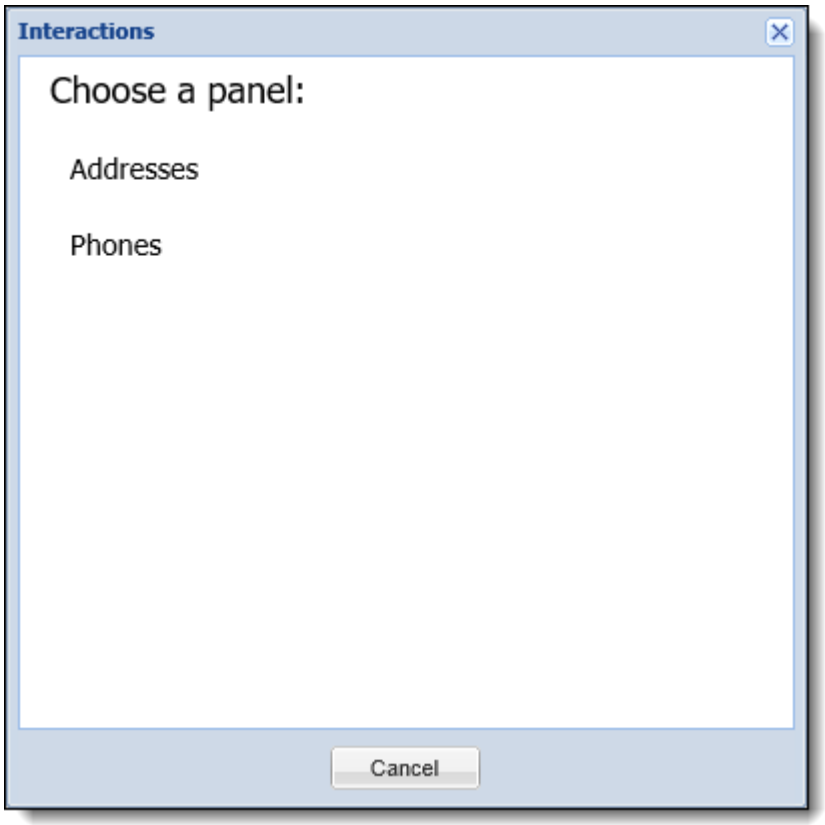
Based on the logic in this condition, the Offers panel will not appear on the Account Collateral screen, if the collateral is not for sale.

Hide Row Conditions

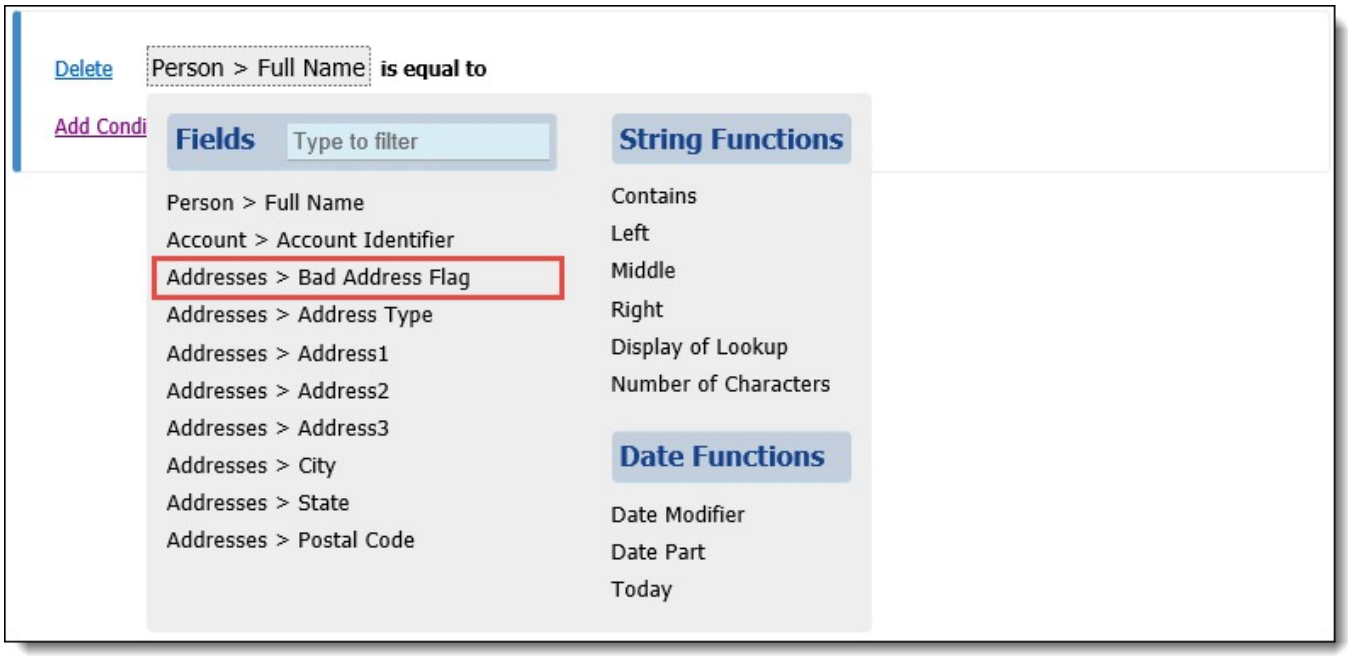
The following example demonstrates how to create an interaction that hides all bad addresses from the Addresses panel.

> The following example assumes that a Person screen has been created with an Addresses panel, that includes the Addresses > Bad Address Flag column.

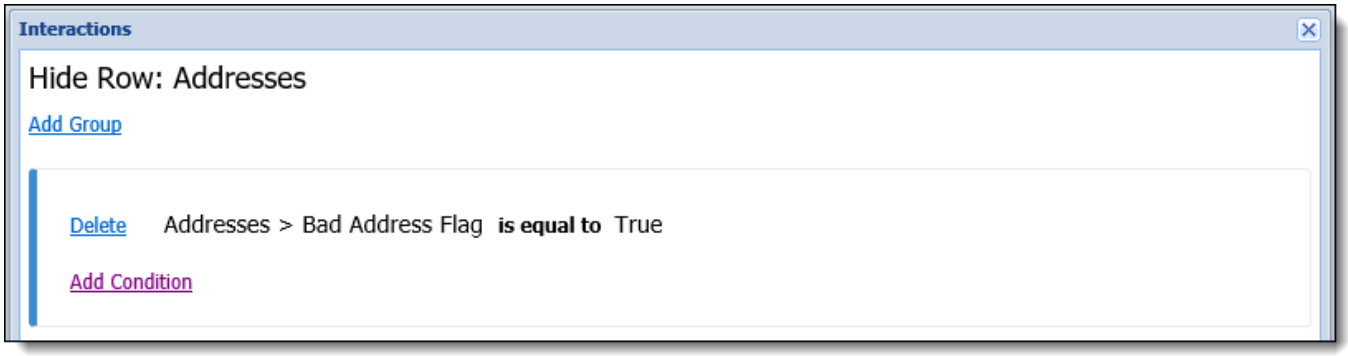
Navigate to the Interactions tab, click Add, and select Hide Row. Within the Interactions pop-up window, select the Addresses panel.



Once the Addresses panel is selected, the Interactions pop-up window closes, and the Condition and Expression Builder appears. Click Add Condition to begin authoring the hide conditions for the Addresses panel. Click on the first token (Person > Full Name) to open the field and function menu. Within the field menu, select Addresses > Bad Address Flag.



The field and function menu closes, and the first token displays Addresses > Bad Address Flag. The relationship operator automatically updates to display **is equal to**, and the right expression defaults to True. Since these are the desired conditions, no further updates are required. Click OK to save the interaction.



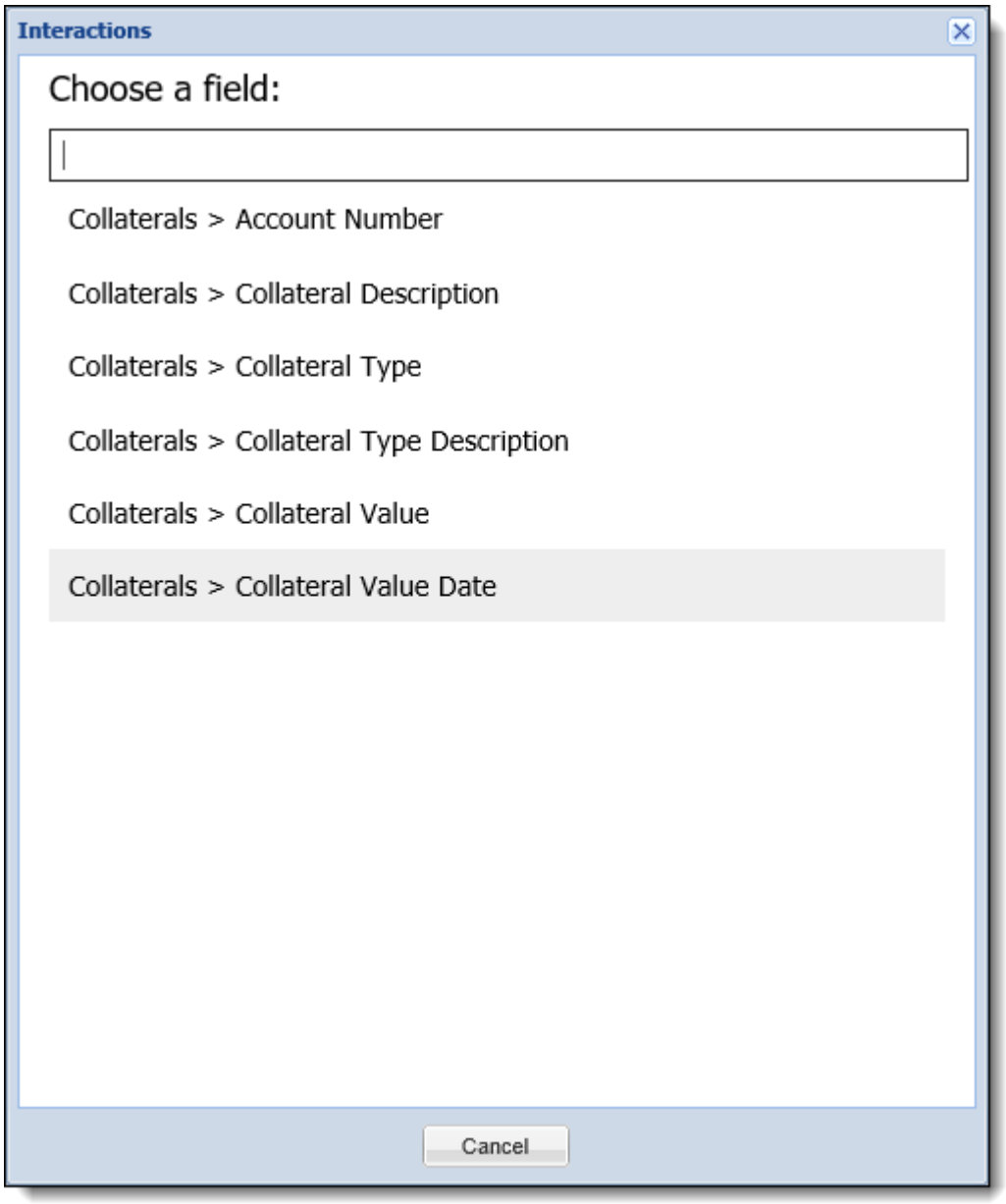
Based on the logic in this condition, the Addresses panel hides all addresses that are flagged as bad.

Validate Field Conditions

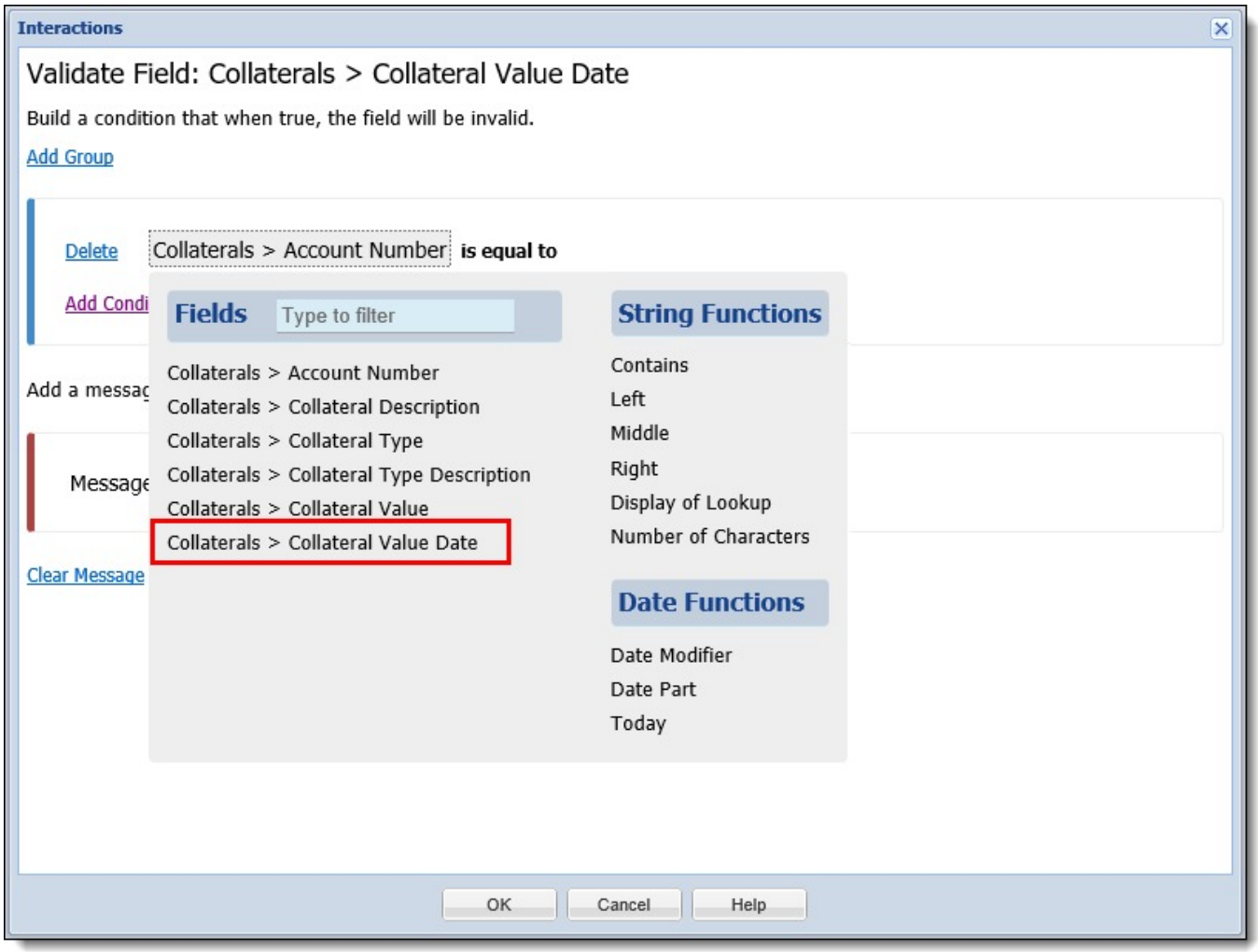
The following example demonstrates how to create an interaction that validates the values entered within the Collateral Value Date field.

> The following example assumes that an Account Collateral screen has been created with a Collaterals panel, that includes the Collaterals > Collateral Value Date field.

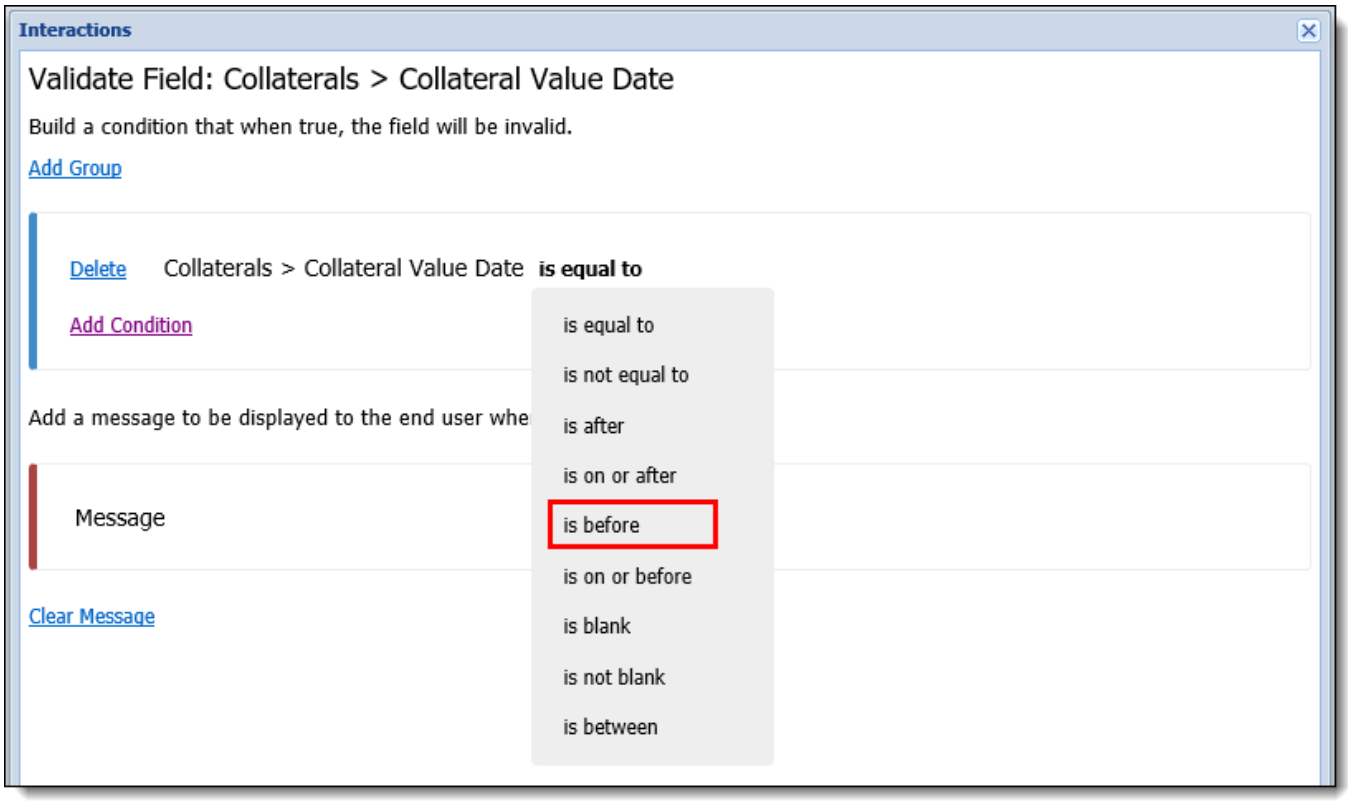
Navigate to the Interactions tab, click Add, and select Validate Field. Within the Interactions pop-up window, select Collaterals > Collateral Value Date.



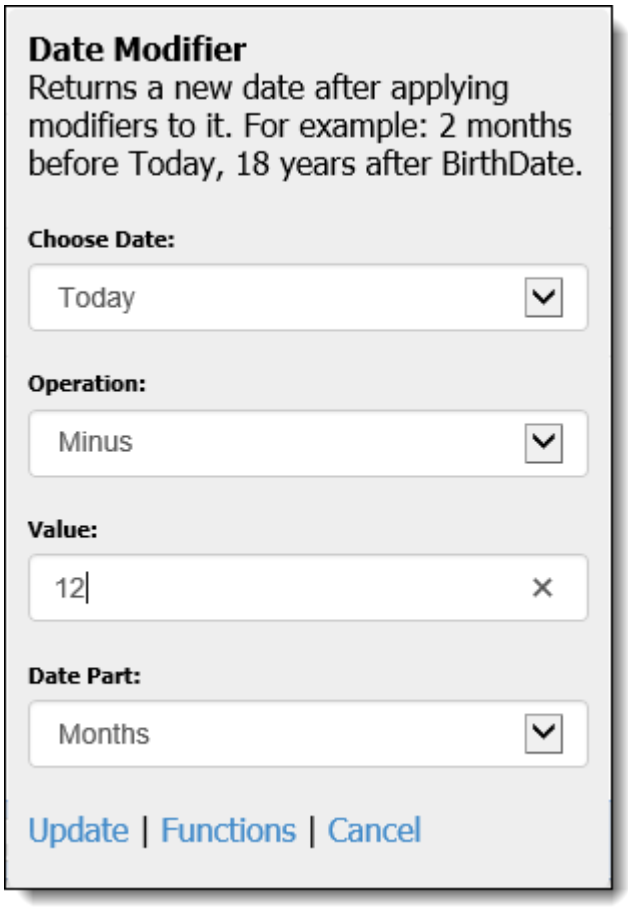
Once the Collaterals > Collateral Value Date has been selected, the Interactions pop-up window closes, and the Condition and Expression Builder appears. Click Add Condition to begin authoring the conditions in which a value entered in the Collateral Value Date field is invalid. Click on the first token (Collaterals > Account Number) to open the field and function menu. Within the field menu, select Collaterals > Collateral Value Date.



The field and function menu closes, and the first token displays Collaterals > Collateral Value Date. Click on the relationship operator (is equal to) to open the relationship operator menu. Select **is before** within the menu.

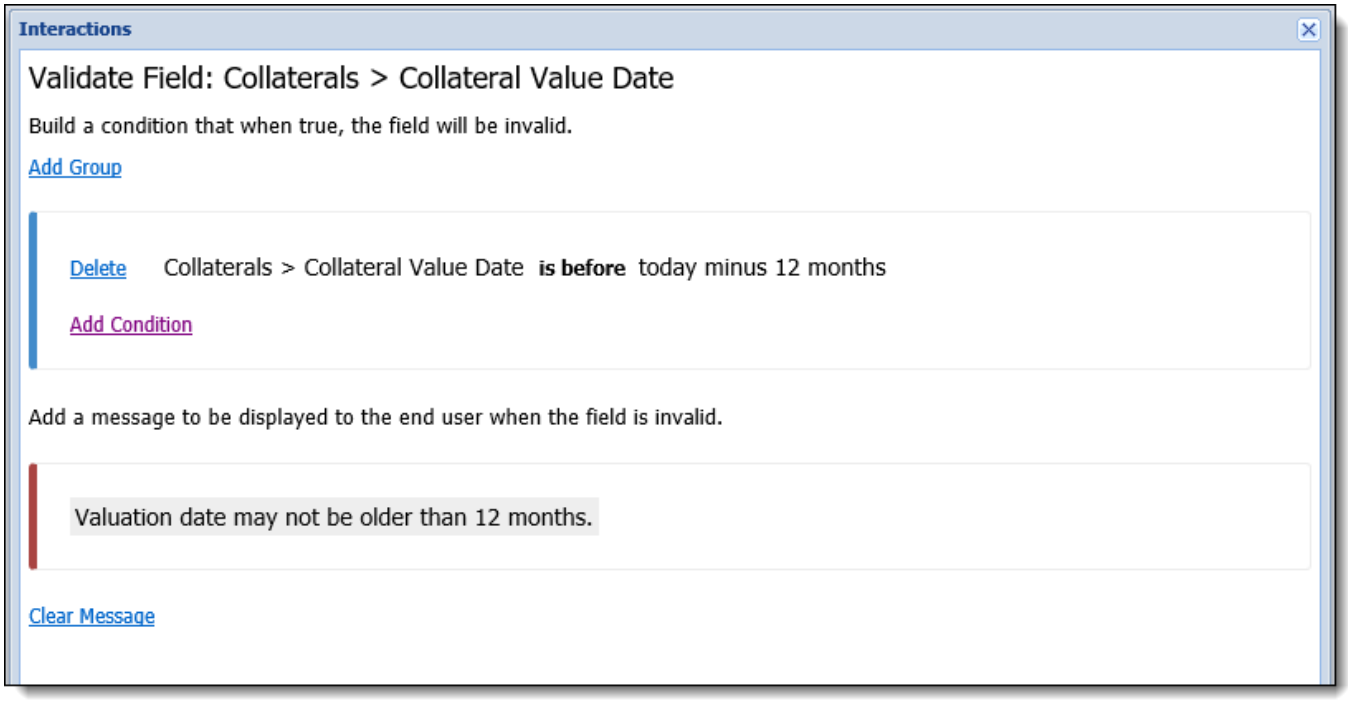


The menu closes, and the relationship operator displays as **is before**. Click on the empty token to the right of **is before** and press the Equal sign (=) on the keyboard. Upon pressing the Equal sign, the field and function menu opens. Select **Date Modifier** from the function menu. Update the Choose Date, Operation, Value, and Date Part attributes as displayed in the image below:



Once all function attributes have been set, click **Update**. The Date Modifier Input window closes, and the function populates to the right of the relationship operator in the condition.

Click within the Validation Message token, and enter the message that displays to an end user, if an invalid entry has been made.



Based on the logic in this condition, if the end user enters a date older than one year in the Collateral Value Date field, a validation message instructs the user that an invalid date has been entered.

Glossary

B

Bank
A for-profit financial institution that provides financial services, such as wealth management and currency exchange, to its customers. See also Financial Institution.

C

Core

This functionality is used to power all of its solutions.

Credit Union
A not-for-profit financial organization that exists to serve its members as a member-owned and cooperative institution. Credit union members can borrow from pooled deposits at reasonable interest rates. See also Financial Institution.

D

DataSafe
This is a Core. Formally known as USERS. Sometimes referenced as Fiserv DataSafe.

Disaster Recovery

A disaster recovery plan (DRP) - sometimes referred to as a business continuity plan (BCP) or business process contingency plan (BPCP) - describes how an organization is to deal with potential disasters. Just as a disaster is an event that makes the continuation of normal functions impossible, a disaster recovery plan consists of the precautions taken so that the effects of a disaster will be minimized and the organization will be able to either maintain or quickly resume mission-critical functions.

E

Enhancement

An enhancement adds efficiency, functionality, or productivity to an existing feature. It can also include a change to the way data is processed or may impact or change the way a user works in the system.

F

Financial Institution
A generic term for a firm, organization, or company engaged in the business of dealing with monetary transactions, such as deposits and loans. Can be used to refer to credit unions or banks. See also Credit Union and Bank.

Fixed Defect

A fixed defect implies that a correction has been made to a known issue in the product.

H

High Availability
In information technology, high availability refers to a system or component that is continuously operational for a desirably long length of time. Availability can be measured relative to "100% operational" or "never failing." High availability centers around backup and failover processing and data storage and access. For storage, a redundant array of independent disks (RAID) is one approach or another approach is storage area network (SAN). HA includes clustering, load balancing, and reports scale out.

HMDA
See Home Mortgage Disclosure Act.

Hot Fix
A hotfix is a single, cumulative package that includes one or more files that are used to address a problem in a software product. Typically, hotfixes are made to address a specific customer situation and may not be distributed outside the customer organization.

N

New Features
A new piece of functionality added to the product.

R

Release
Temenos's annual software release provides significant functionality. The deployment of a release is comprehensive and includes all components of the software. When installed, missing/dependent releases will also be installed. Releases are accompanied by Release Notes to describe all the new features, enhancements, and fixed defects for that release.

Release Notes
A series of product releases that are distributed each year that contain a number of new features, enhancements, and fixed defects. They provide detailed information regarding these product changes, how to install them, and how to use them.

Ribbon Bar

The ribbon bar allows users to quickly access major features and functionality via buttons found at the top of Temenos Infinity's user interface.

S

Spectrum
This is a Core. Formally known as Summit. Sometimes referenced as Spectrum from Fiserv.

T

Task Process

Contains many task templates and allows you to group these task templates together.

Task Templates
Defines a specific task that needs to get done

Temenos Infinity
Temenos's browser-based relationship management platform, providing common services such as dashboards, views, reports, workflows, business rules, and security with business-specific functionality to create solutions for origination, service, recovery, and profitability.

U

Update

A software update addresses minor issues or adds minor functionality to the Framework. Updates include all components of the software and will apply all missing/dependedent Releases/Updates. Updates may also be released when necessary for specific customers. Updates are accompanied by a bulletin and Release Notes.

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