1 Table of Contents

Basic Functionality

Logging into Temenos Infinity

To log into the Temenos Infinity, follow the below instructions:

- Type **http://[SERVERNAME]/Akcelerant/session/login** into an internet browser.

> Each institution's setup determines if the address path is http:// or https:// to access Temenos Infinity. Depending on the institution's set up, enter http://SERVERNAME/Akcelerant or https://SERVERNAME/Akcelerant into an internet browser.

- Press **Enter.** The Temenos Infinity login page opens.

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

- Enter the username and password in the designated fields.
- Click 
.
- If the log in attempt is successful, the system pre-loads workspaces for optimal performance.

- Once initialization is complete, the Temenos Infinity desktop appears.

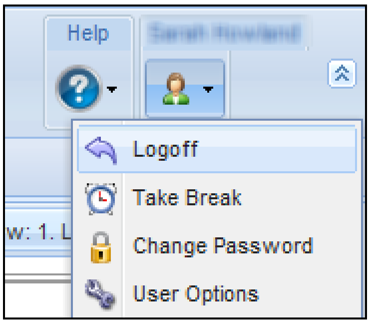
> - Click Use Windows Authentication if the system is configured to use windows login credentials. This is set by an administrator in the individual user's settings.
> - Both usernames and passwords are case sensitive.
> - The system is pre-configured to allow a certain number of login attempts. If the maximum number of login attempts is reached, the account is de-activated and the system administrator must be notified.

> - Click Use Single Sign-On if the system is configured to use SSO login credentials. This is set by an administrator in the individual user's settings.

Logging off Temenos Infinity

To successfully log off of Temenos Infinity:

- Click the person drop-down in the top right of the Ribbon Bar.
- Select Logoff.



- Within the prompt that appears, click **Yes** to complete the log off process.

> ⚠ It is highly recommended that users DO NOT log off by clicking the ✕ in the upper right corner of the browser, or the tab containing the desktop. Clicking the ✕ closes the browser, or the desktop, but does not log the user out of the system correctly, which can affect the recording of performance numbers.

Session Expiration

In addition to manually logging out of Temenos Infinity, users may be automatically logged out if their session is idle for too long.

> Session idle limits are set in System Management.

Once a session has been deemed idle, the user is logged out, and redirected to the log in page; where an error message indicates that "You were logged out for security reasons. Please log in again."

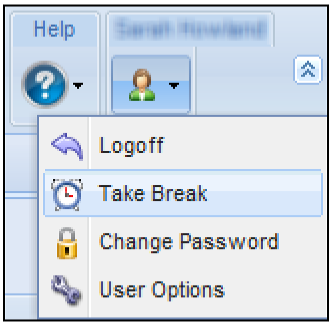
> Any unsaved work is lost, if a user's session expires.

⚠ When using the Take a Break functionality, if a user's break exceeds the Session Idle Limit or Expiration Period set by the administrator, the user is logged out, and redirected to the log in page.

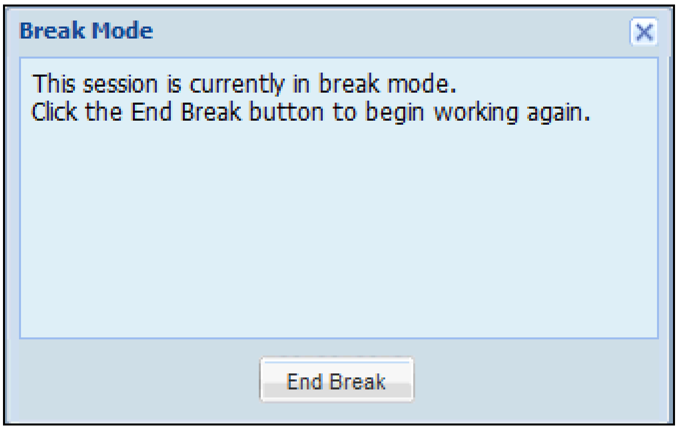
Taking a Break

Within Temenos Infinity, users are able to pause time within the application without logging out completely. This function allows users to remain logged into the system without affecting performance numbers.

- On the top right of your screen, click the person icon drop-down.
- Select **Take Break**.



- Click **Yes** to the prompt to take a break.
- A message appears on the screen displays indicating the user is currently in break mode.



- To end the break and continue working normally, click **End Break**.

> Any accounts a user has open remain locked until the user returns from break.

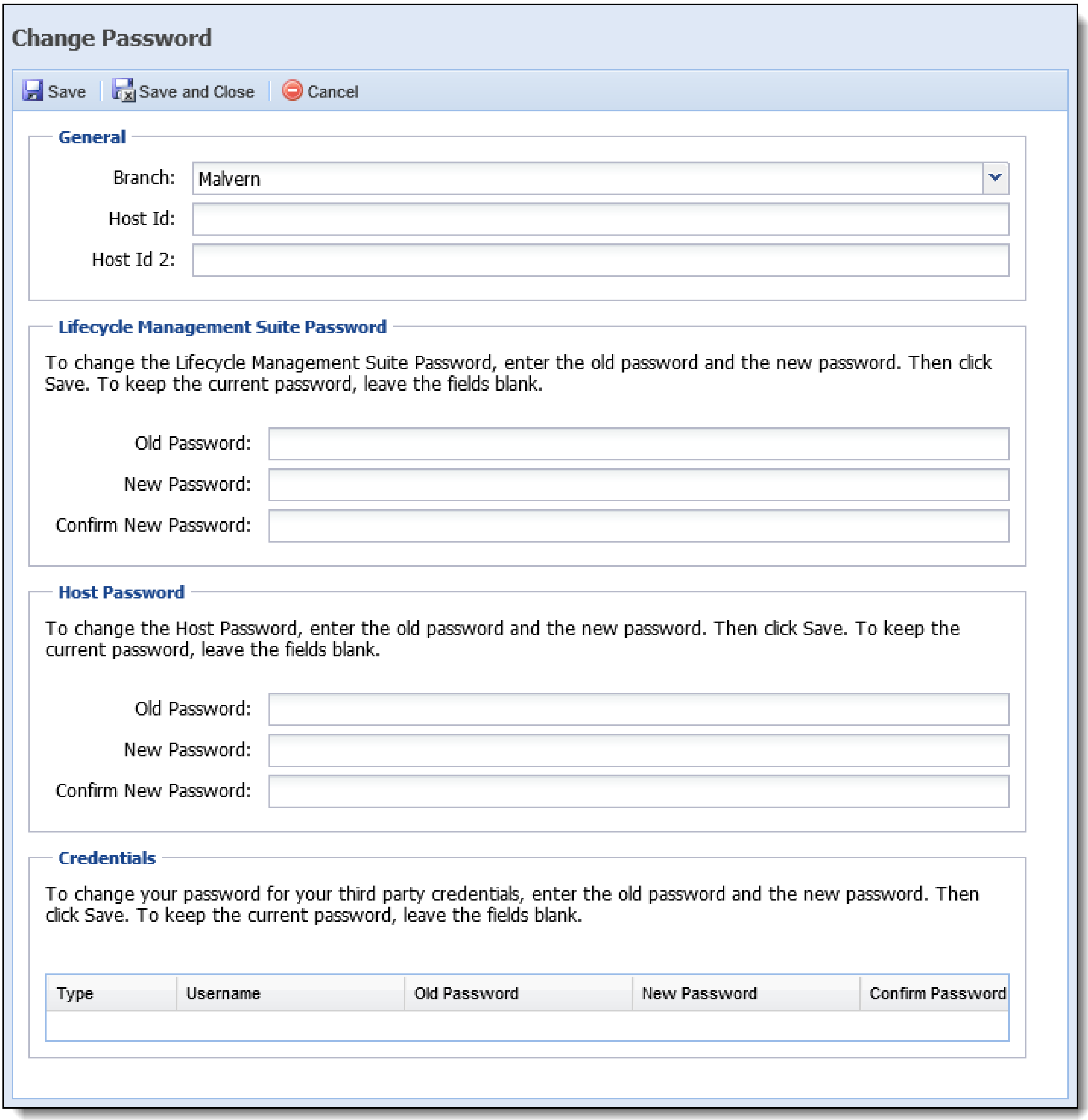
⚠ If a user's break exceeds the Session Idle Limit or Expiration Period set by the administrator, the user is logged out, and redirected to the log in page. Any unsaved work will be lost.

Changing Your Password

The Change Password window provides the ability to quickly and easily update passwords for the logged-in user. This window can be accessed from the User drop-down in the top right of the Ribbon Bar.

Within the User drop-down, selecting 

opens the Change Password window.



The following sections appear within the Change Password window to allow specific password and branch details to be updated for the logged-in user:

- General

The General section provides the ability to identify the branch where a user is currently working, as well as capture specific user information for certain core interfaces, such as the PC Alias Name. This section includes the following fields:

Field	Description

Branch	Select the branch where the user is currently working. This value is used for tracking purposes and is not a required field. This drop-down list includes the branches configured by the system administrator.
Host Id	This field is used to capture specific user information for certain core interfaces. For information on whether this field is used for a specific core and the information that populates, please see the applicable core connector guide.
Host Id 2	This field is used to capture specific user information for certain core interfaces. For information on whether this field is used for a specific core and the information that populates, please see the applicable core connector guide.

Lifecycle Management Suite Password

The Password section enables the ability to update the password used by the logged-in user to access Temenos Infinity.

This function is only available to users who do not use the Windows Authentication password option.

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

This section includes the following fields:

Field	Description
Old Password	Enter the current password that provides the logged-in user with access to Temenos Infinity.
New Password	Enter an updated password for the logged-in user.
Confirm New Password	Re-enter the value added within the New Password field to confirm that the password is being updated to the correct value.

Host Password

The Host Password section enables the ability to update the password that allows the logged-in user to write back changes to the host system. This section includes the following fields:

Field	Description
Old Password	Enter the current password that allows the logged-in user to write back changes to the host system.
New Password	Enter an updated host password for the logged-in user.
Confirm New Password	Re-enter the value added within the New Password field to confirm that the host password is being updated to the correct value.

Credentials

The Credentials section enables the ability to update the password for any third party connectors that the logged-in user has been granted permission to access. This section populates with the names of all third party connectors and core interfaces for which the user has been assigned credentials by the system administrator.

The grid within this section includes the following fields:

Field	Description
Type	Displays the name of the third party connector.
Username	Displays the user login name for the associated third party connector.
Old Password	Enter the current third party connector password for logged-in user.
New Password	Enter an updated third party connector password for the logged-in user.
Confirm New Password	Re-enter the value added within the New Password field to confirm that the third party connector password is being updated to the correct value.

When all of the desired information has been updated, click Save and Close to retain the new values.

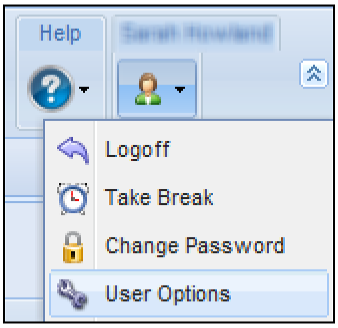
> If a new password does not meet the minimum requirements set by the system administrator, or the passwords entered are invalid, an error message appears upon clicking Save and Close.

User Options

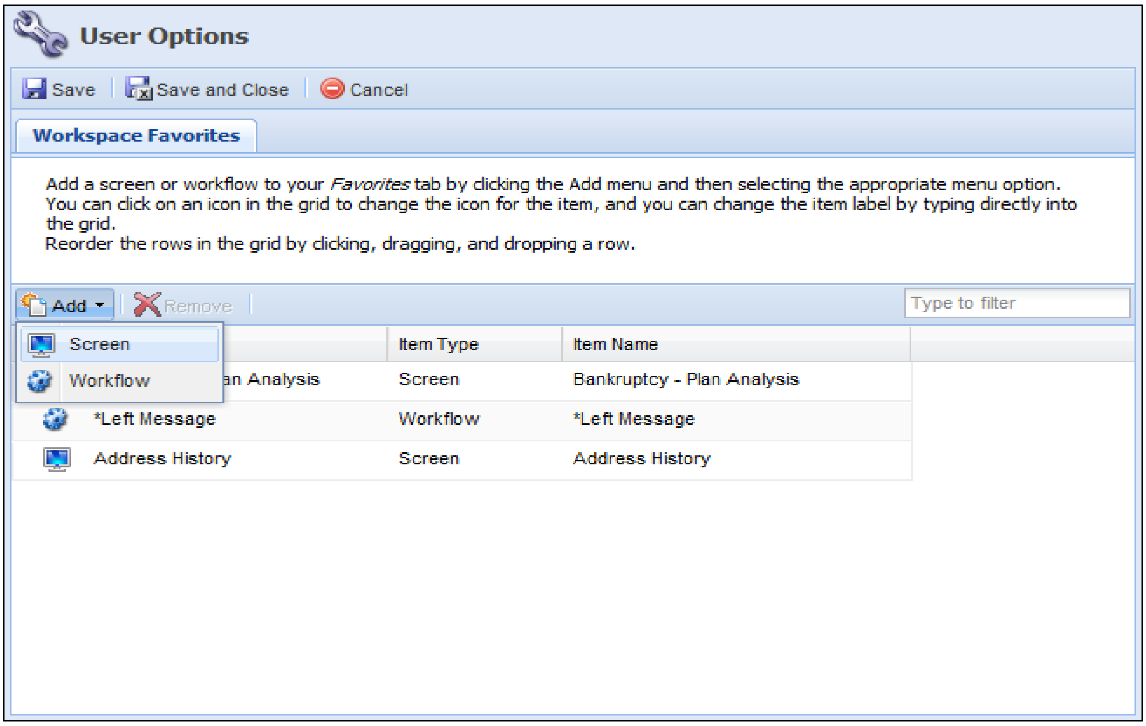
User Options allows users to manage their favorites section without having an account or case open. Changes made in this window appear in the Favorites menu in the left navigation panel.

To Manage Favorites

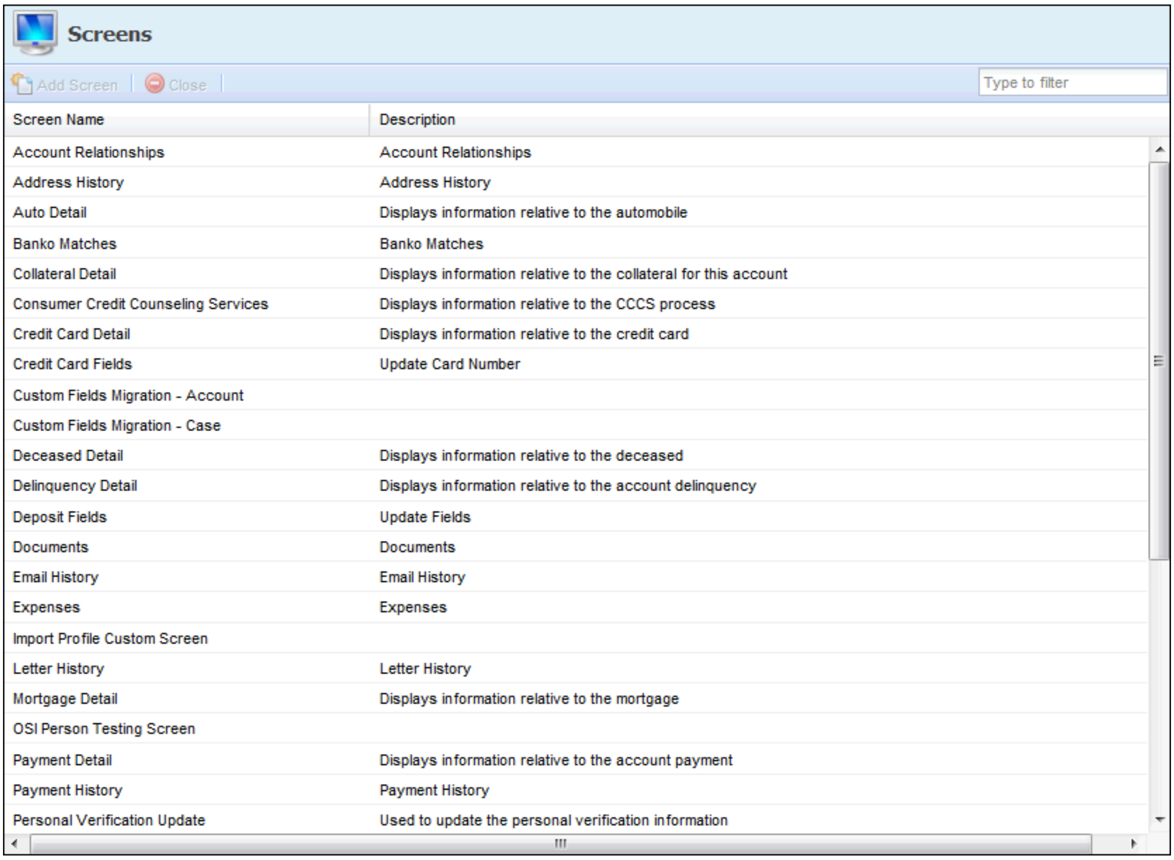
- In the top right of the Ribbon Bar, click the person icon drop-down.
- Select **User Options.**



- The User Options window appears. From this window users can add screens, workflows, and tickets populated within Temenos Infinity by clicking the **Add** drop-down and selecting the option of their choice.



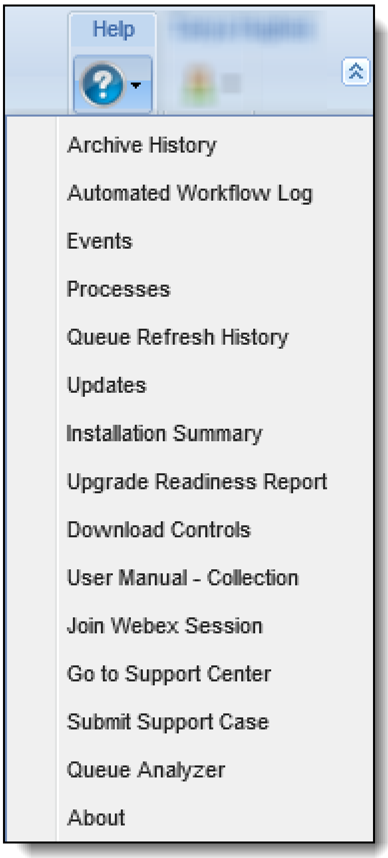
- A screen appears reflecting the selection. The Example below shows Screens. Click to highlight an item within the list and click **Add Screen** to add the item to the favorites list. Click **Close** to close the screen without adding any items.



- The new selections appear in the favorites list. Click **Save** or **Save and Close** to save the selections and close the window. Click **Cancel** to close the window without saving. To remove a favorite from the list, highlight an item and click **Remove.**

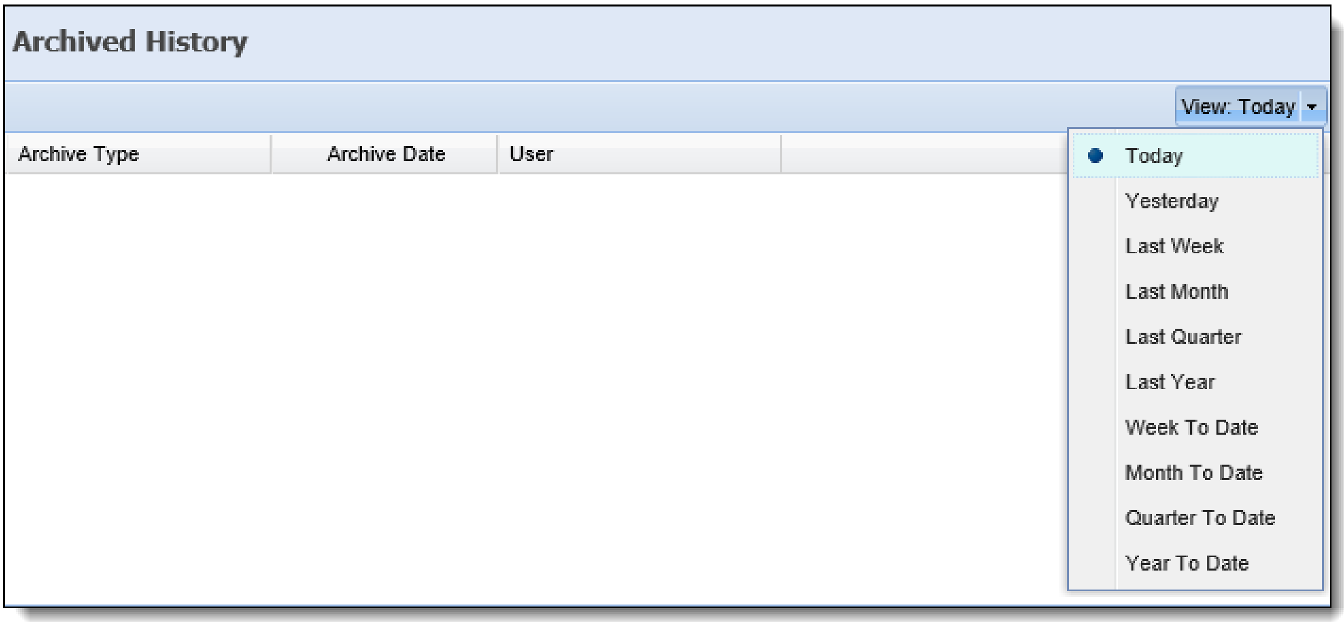
Help

Click the drop-down links below for more information on the options available in the Help menu.



Archive History

The Archive History screen displays a purge account history. It displays the Archive Type, Archive Date, and the user who performed the Archive. Users can group the results using the **View** drop-down to sort Archived History by time periods. System Administrators can use the Archive Data function found within System Management to perform the purge function. For more information see the System Administrator Guide.



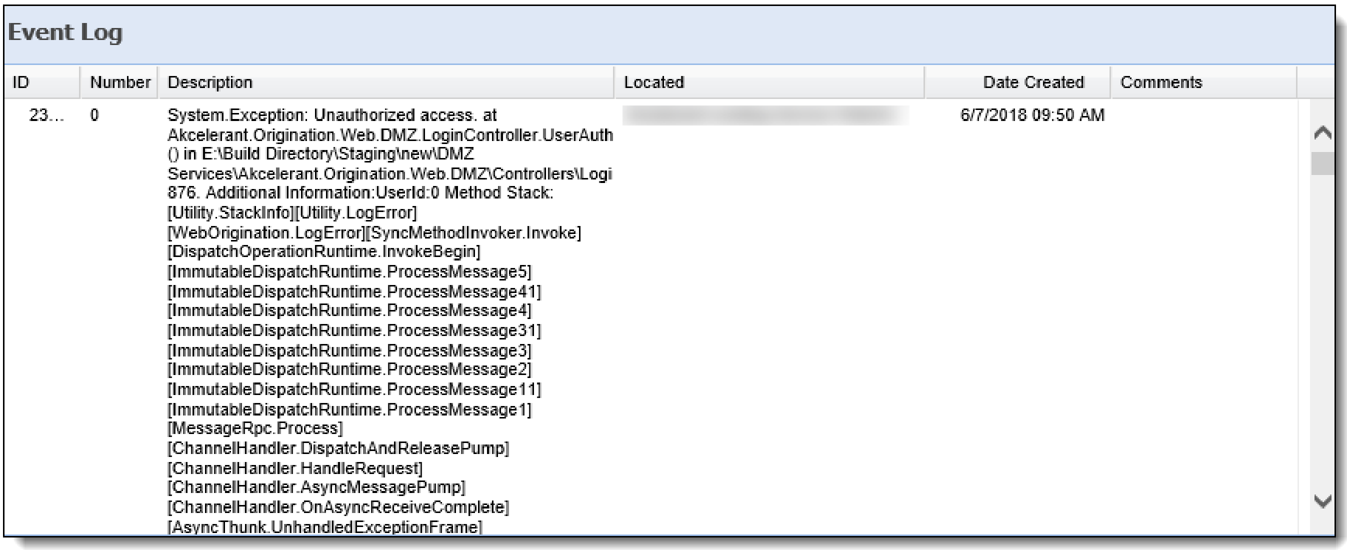
Automated Workflow Log

The Automated Workflow Log page shows a log of the automated workflows that were executed. This displays Name of the Workflow, the User who used the Workflow, the Account Count, the Case Count, and the Date Created of all automated workflows.

Events

The Events screen is an error log. If an error is received in Temenos Infinity, navigate to this screen to obtain details to place in a support ticket. Temenos Support may request that users access this page during a support call.

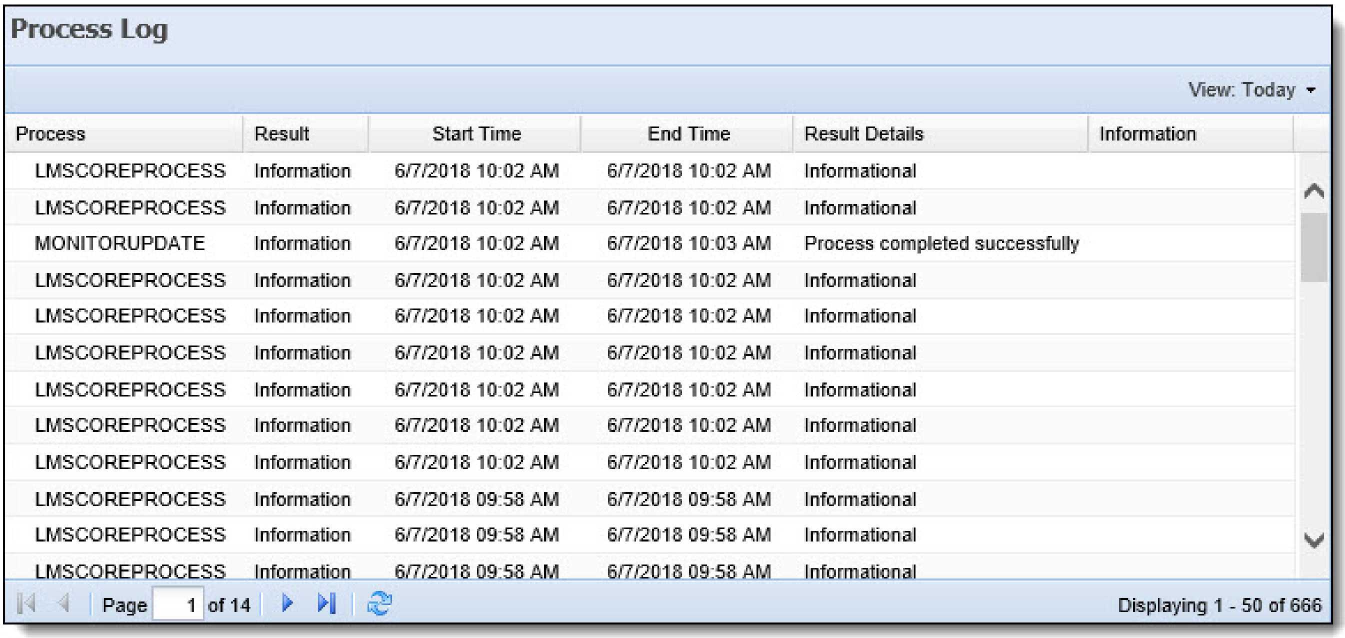
> The Event Log displays the top 500 errors recorded over the last two months.



Processes

This page lists the system processes that run throughout the day. This displays the system process name, the result of the process (completed or failed), the start and end time, result details, and additional information about the process. The view drop-down in the top right-hand corner allows the user to view the system process for various time periods. If any process has failed, please contact a Temenos Customer Support Representative as soon as possible.

> Failed process can be restarted by a system administrator in the Processes section of Server Manager.



Process Log

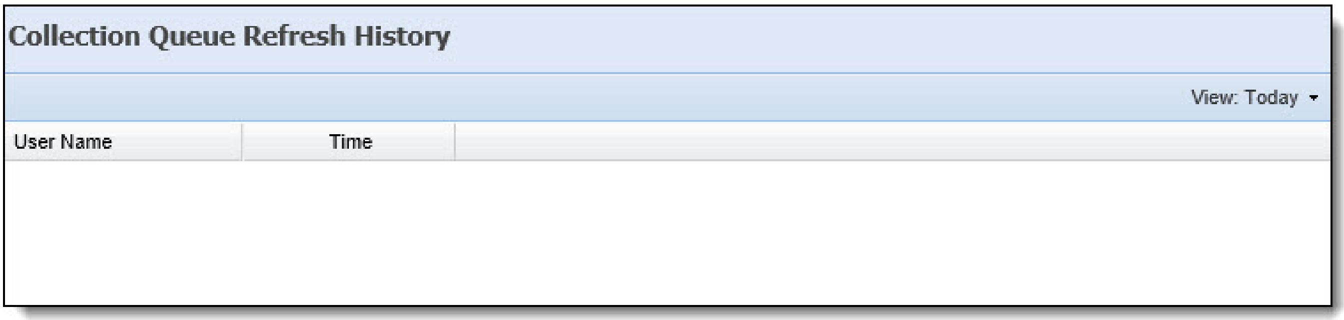
View: Today

Process	Result	Start Time	End Time	Result Details	Information
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
MONITORUPDATE	Information	6/7/2018 10:02 AM	6/7/2018 10:03 AM	Process completed successfully	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 10:02 AM	6/7/2018 10:02 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 09:58 AM	6/7/2018 09:58 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 09:58 AM	6/7/2018 09:58 AM	Informational	
LMSCOREPROCESS	Information	6/7/2018 09:58 AM	6/7/2018 09:58 AM	Informational	

Page 1 of 14 Displaying 1 - 50 of 666

Queue Refresh History

The Queue Refresh History shows a log of each time the queues were refreshed, either by the system or by a user. This displays the User Name, Date, and Time. View the queue refresh history by Today, Yesterday, Last Week, Last Month, Last Quarter, Last Year, Week to Date, Month to Date, Quarter to Date, and Year to Date.



Installation Summary

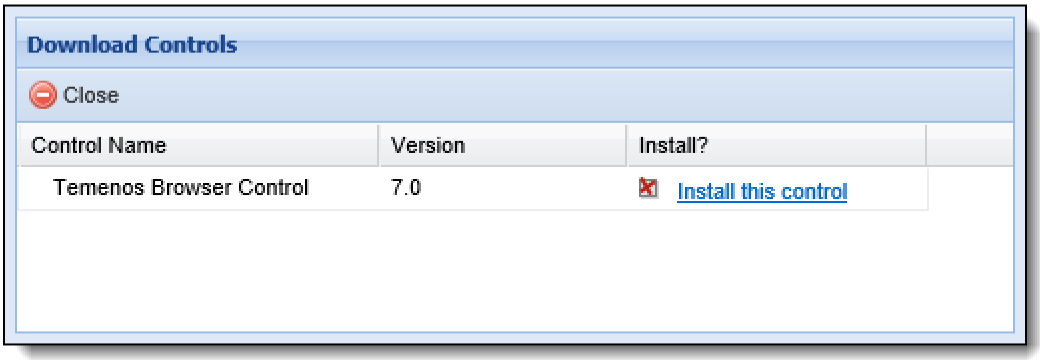
The Installation Summary lists all patches that have been applied to the application and what patch level the Temenos Infinity system is currently running. Temenos Customer Care Representatives may request that users access this page during a support call. It is very important to make sure the institution is up to date on all current upgrades/patches.

> The http://services.akcelerant.com URL must be added to Internet Explorer Trusted Sites in order to view the Installation Summary page.

Download Controls

The Download Controls screen provides a list of ActiveX controls used by Temenos Infinity, and displays installation status (Installed or Not Installed) for each control. Clicking on a control downloads and installs the control. This feature simplifies installation/updating of controls that are upgraded by Temenos.

The Temenos Browser Control control is only required when using Internet Explorer. If using an Edge browser, a message displays to inform that there are no controls to download for the browser.



Download Control Fields	Description
Temenos Browser Control	Temenos Browser Control is used for client-side document management, and has replaced Report Control. This control must be installed from this screen before the following functionality may be used: Screen-printing.

User Manual - Collection

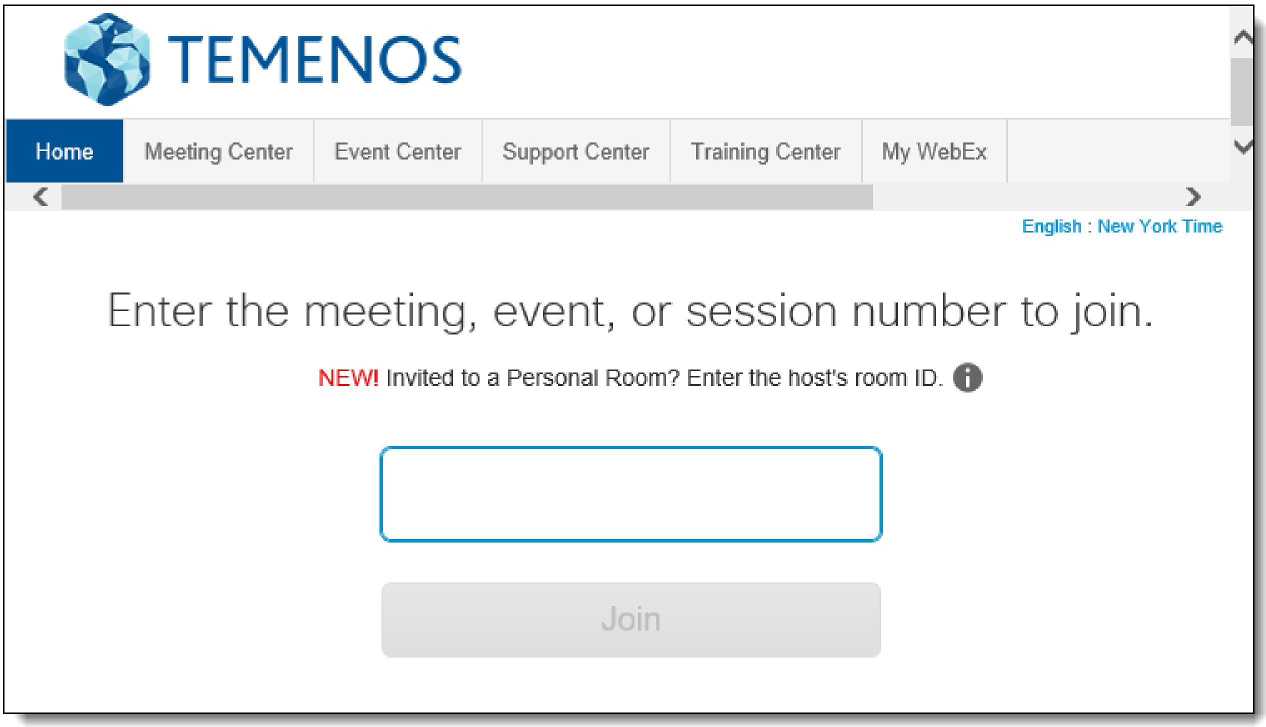
The User Manual – Collection Help option enables user access the User Manual for Temenos Infinity's collection module.

Join WebEx Session

This section is not available in the Help Menu for institutions using the Fiserv Premier core interface.

This link is used to quickly receive live assistance from a Temenos Customer Care Representative. Once the user clicks on Join WebEx Session, a new browser window opens and automatically navigates to the Temenos WebEx site with a Pre-Session Form displayed. To join a WebEx Session, follow the steps below:

- Click **Join WebEx Session**.
- Enter your name in the first and last name boxes.
- Type in the Support Center Number that is provided by the Customer Care Representative.
- Click **Submit** to being the session.



Go to Support Center

> This section is not available in the Help Menu for institutions using the Fiserv Premier core interface.

Selecting **Go to Support Center** directs users to the Temenos Customer Support Center, which requires successful login to the Temenos Client Portal.

Submit Support Case

> This section is not available in the Help Menu for institutions using the Fiserv Premier core interface.

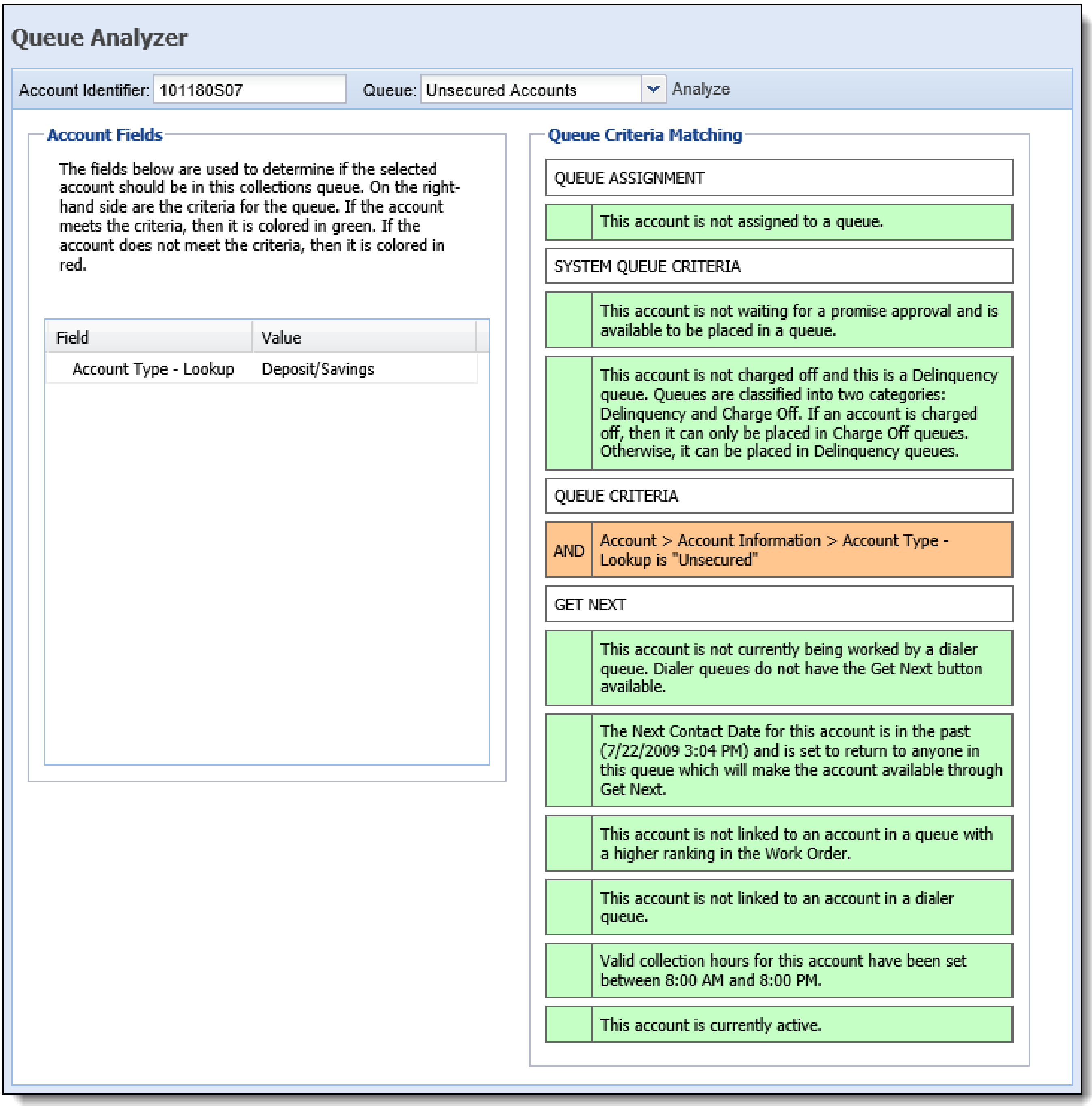
Report any issues that may arise in Temenos Infinity in order for them to be tracked and fixed in a timely manner. For instructions on how to create a New Support Case, please refer to the **Customer Care Link** on the main Support Page in the Temenos Client Portal, or contact a Customer Care Representative.

Enter your email and password to access the site. Should you forget your password, please contact a Customer Care Specialist.

Queue Analyzer

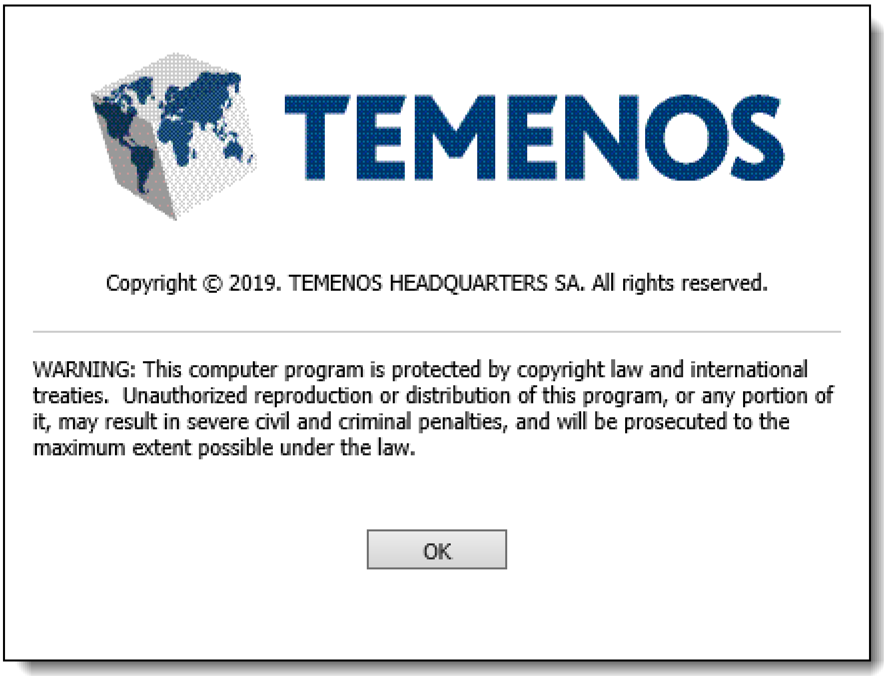
The Queue Analyzer determines what queues an account qualifies for or does not qualify for. When a valid Account Identifier has been entered, and the user clicks Analyze, the screen updates to display a list of all queues in a work orde,r and indicate which of the queues are “matched” as defined in the “Match” column. If the account meets the criteria, it is colored green. If the account does not meet the criteria, it is colored red.

> Please see the Queue Analyzer topic in this guide for more information.



About

Selecting **About** prompts an informational window that provides information about Temenos Temenos Infinity. This window contains copyright and security information about Temenos. Click **OK** to exit out of this screen.


TEMENOS
Copyright © 2019. TEMENOS HEADQUARTERS SA. All rights reserved.
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.
OK

General Navigation

Person Workspace

This topic explains how to navigate within the Person workspace in Temenos Infinity.

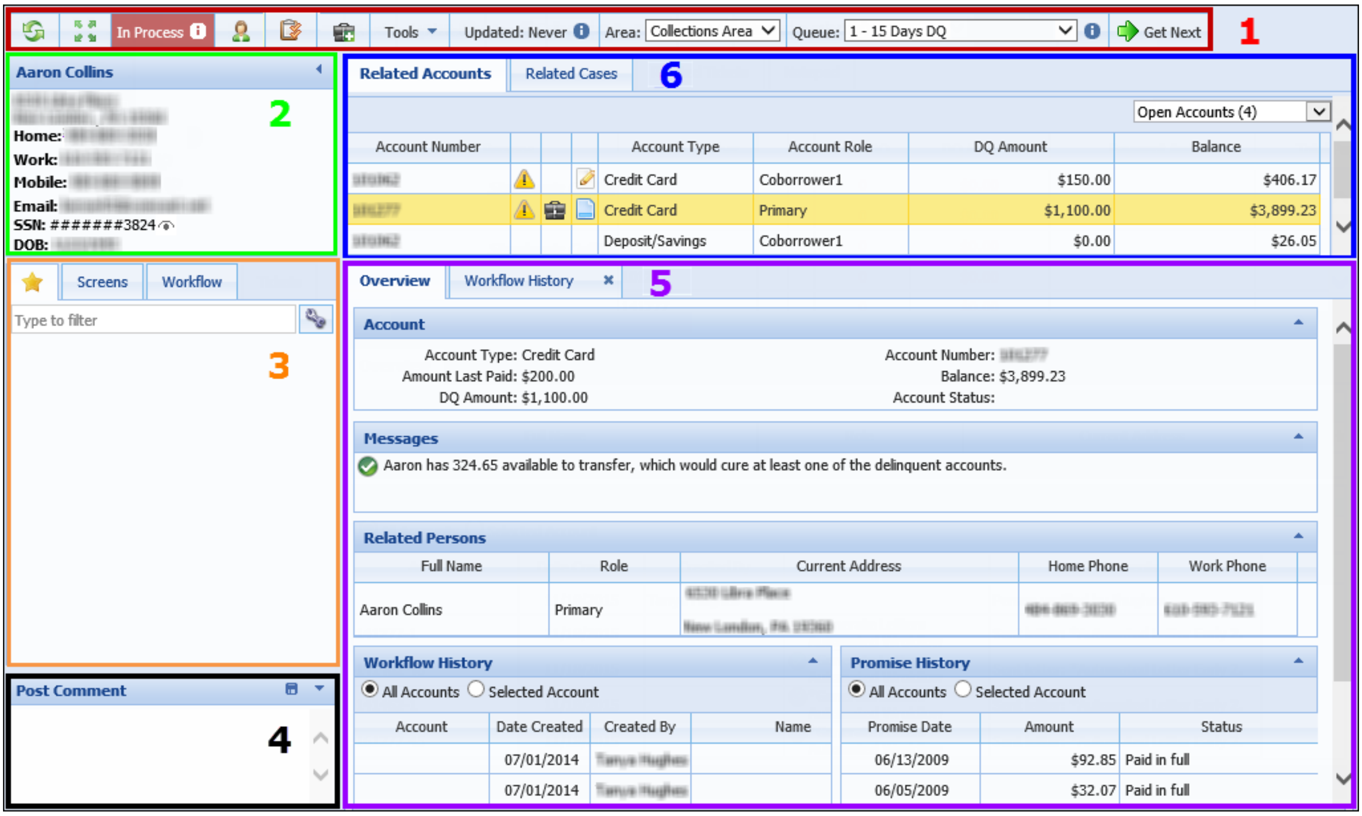
The workspace displays a 360 degree overview of a person in Temenos Infinity, and provides the ability to work all accounts and cases for that person on one screen. Workspace screens can be configured by administrators to display institution-specific information within various person, account, or case panels in the overview section, as well as all account or case information for a person within columns that display on the Related Panels in the top area screen.

While only one workspace is typically displayed for a single person in Temenos Infinity, there are instances where one person may have multiple distinct workspaces, with different accounts, due to the information received from the core or third party import. Reference the section below for an overview of the scenarios that could occur to create more than one workspace for a person in Temenos Infinity:

- Multiple Person Workspace Scenarios

Scenario 1: Financial institution is on a person-centric core. During the core import, information is sent to Temenos Infinity that identifies two distinct person records. For example, if the core sends a Person Number, and the person has two different Person Numbers on record in Temenos Infinity, the information is not linked to a current workspace as the system cannot determine the Person Number to which the information should be linked.

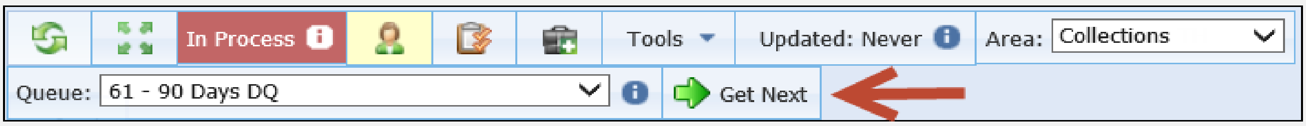
Scenario 2: Sufficient information is not sent for a person during a Third Party Import or Create Profile Import. For example, if the third party, or profile import, sends an unformatted SSN, the system may not be able to determine if the number is associated with an SSN or EIN; therefore, the information is not linked to a current workspace as there is not enough information to safely link the data in the import with a record in Temenos Infinity.



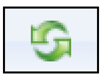
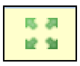
1 - Workspace Toolbar

The workspace toolbar is located on the top of all workspaces.

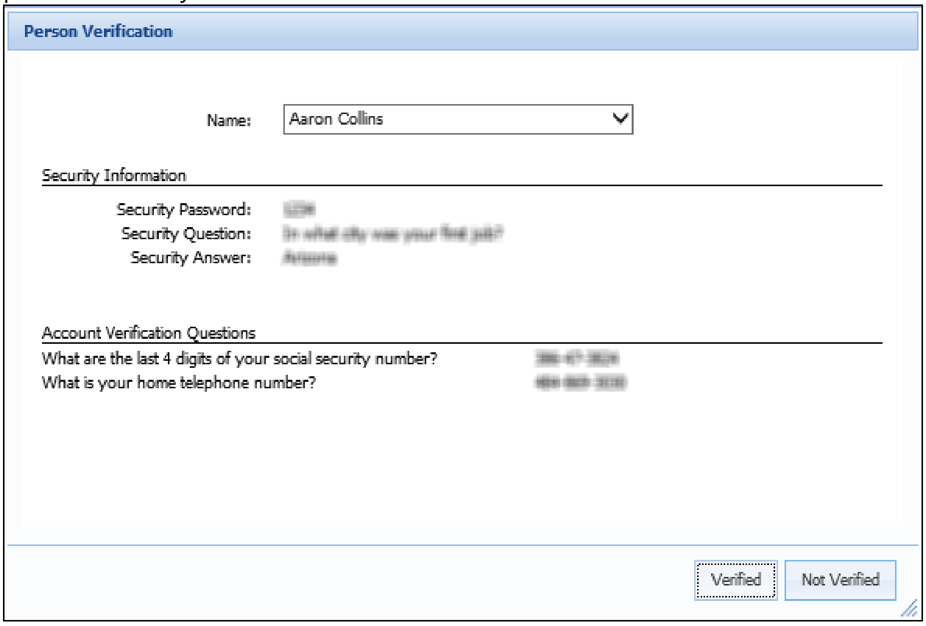
When a screen is enlarged, the icons on the workspace toolbar wrap to the next line and are left-justified in order to maintain accessibility.



Below is a list of the Toolbar icons and their descriptions:

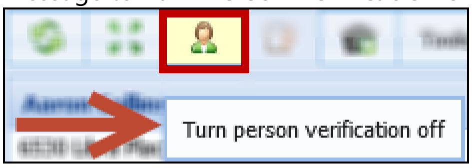
Toolbar Icon	Description
	Click the **Refresh icon** to refresh the workspace being viewed. Any updates made to the workspace are displayed upon selecting this icon.
	Click the **Full Screen icon** to maximize the amount of space available to work a person. When selected, the icon appears active  and the Person Summary Box, Left Navigation Panel, Post Comment Box, and Top Area Screen are collapsed to provide a large viewing area for screens. Clicking the Full Screen icon again reverts these modifications. The top area screen is automatically collapsed when this icon is selected. Click on one of the tabs that display on that screen to have it re-open.

Click the Person Verification icon to turn Person Verification on or off for the workspace. This feature is controlled by the system administrator in System Management > Areas. When this feature 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.



> Person Verification only display when a workspace is opened through a Search and do not appear when working a queue.

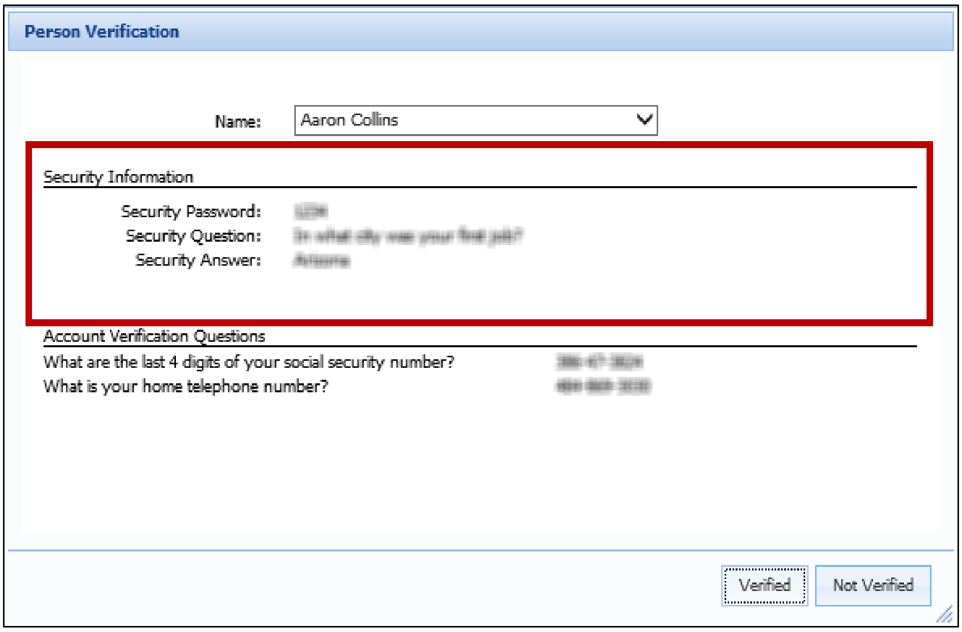
When Person Verification is on, the icon appears active and hovering over it displays a message to **Turn Person Verification off**.



Clicking this icon turns off the Person Verification functionality for your user. Person Verification does not display upon opening a new person workspace until the Person Verification functionality is enabled by re-clicking the icon.

- Configuring Security Information

Within the Person Verification message, a section for Security Information appears that includes a Security Password, Security Question, and Security Answer. These fields are configured on the Person Verification Screen created by a system administrator in System Management > **Screens**.



When in a person workspace, the Person Verification screen can be accessed from the Screens tab on the Left Navigation panel. Once this screen is selected, it populates next to the overview tab in the workspace.

The Person Verification screen consists of three fields:

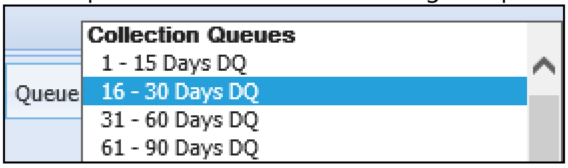
Field	Description
Security Password	If editable, the security password displayed on the Person Verification message for the person in the workspace is defined here. Enter a security password within this field.
Security Question Code	If editable, the security question displayed on the Person Verification message for the person in the workspace is defined here. Select a Security Question to display from the options within the drop-down. The questions available within this drop-down are configured by the system administrator.
Security Question Answer	If editable, the security question answer displayed on the Person Verification message for the person in the workspace is defined here. Enter the answer for the security question selected from the Security Question drop-down in this field.

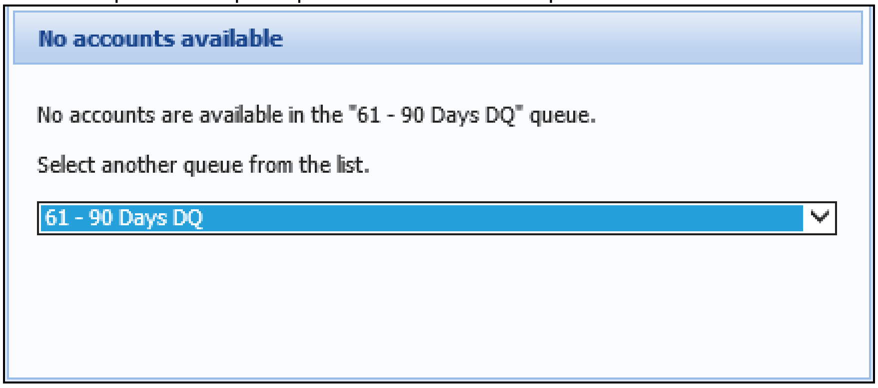
Additional panels and/or fields may display on the Person Verification screen if configured by system administrators in System Management > Screens. It is here that system administrators also determine if these fields are required, recommended or read-only.

Once all fields on the screen are complete, click Save. A success message appears to confirm that the screen saved successfully.

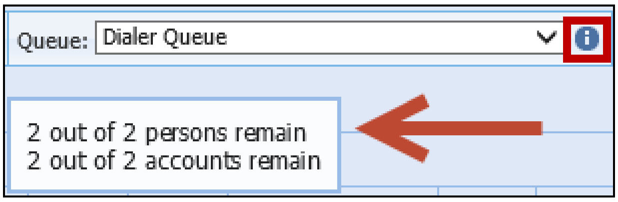
The Security Password, Security Question, and Security Answer defined on this screen now display within the Person Verification message for the person in the workspace.

	The Person Verification functionality is enabled by system administrators in System Management > Areas, and can also be controlled on the workspace toolbar.  This message does not appear if the Person Verification icon is turned off for a user and/or the functionality in not enabled by system administrators.
	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. The Queue Contents icon is disabled unless the person in the workspace is accessed by working a queue.
	Click the **Create New Case icon** 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. For more information on cases, please reference the Cases topic in this gudie.
Tools	The **Tools drop-down** provides quick links to external websites, such as the Temenos website and the websites defined by system administrators in System Management > Hyperlinks. Queue Analyzer, Credit Reporting, and Skip Trace functionality are also available in this drop-down.
Updated: Never	The **Updated icon** refreshes the person workspace from the host and displays when the last update occurred. If changes are made during the refresh, an information icon appears within this notification to alert users of these changes. Hovering over the icon displays the information that changed, as well as any errors that occurred.
Area: Collections	The **Area drop-down** identifies the area being worked, as well as other areas that are available.

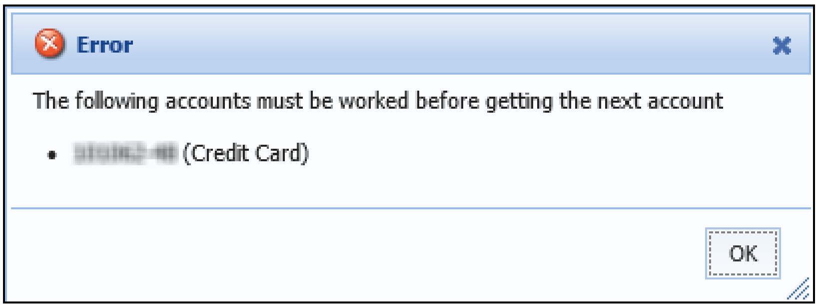
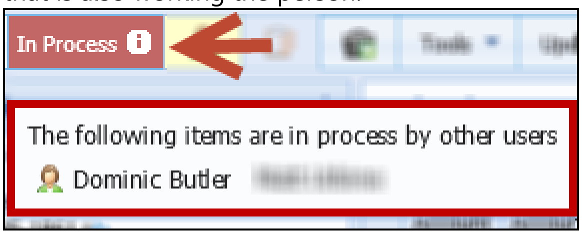
<table>
<tr>
<td>
</td>
<td>The **Queue Selector drop-down** displays the name of the queue being worked. Select the drop-down to see a list of all assigned queues and navigate to other queues.


Selecting a queue from the drop-down opens an account in that queue. If no accounts are available in a queue, a message displays stating that no accounts are available in the selected queue and prompts to select another queue from the list.


When a queue is selected from the Queue Selector drop-down, an information icon appears and hovering over this icon displays the number of persons and accounts remaining to be worked in that queue. This feature is controlled by system administrators in System Management > Areas.



For the information icon to appear within this section of the toolbar, a queue must be selected and the Total and Remaining Accounts and/or Persons functionality must be enabled by the system administrator in System Management > Areas.</td>
</tr>
</table>

	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. 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. A workflow must be executed on the required account(s) in order to count them as worked and update the icon(s) within the Related Accounts panel. For more information on these icons, please see the Top Area Screen section of this topic. If Get Next is selected before the required accounts are worked, the following error message displays:  While working a case queue, the Get Next button allows users to skip active tasks in a case and get the next case in the queue. When tasks are skipped, they are rescheduled to be worked the following workday, adhering to the workday schedule assigned to the task. The Get Next button is disabled unless the person is accessed by working a queue and the Get Next functionality is enabled by the system administrator.
	If another user is currently working the person in the workspace, an **In Process message** displays on the workspace toolbar. An information icon appears within this message to alert users that more information is available. Hovering over the icon displays the user that is also working the person.  Multiple users are able to work a person, but work may be duplicated. There is a possibility that saved changes will be overwritten if another user in process saves a screen containing the fields being edited.

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 this panel is system-defined and includes home address, the home, work, and mobile phone numbers related to the record for the person-in-context, email address, social security number (SSN), and date of birth. The address that displays within the Person Summary panel is the Default Home address identified in the database for that person.

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.

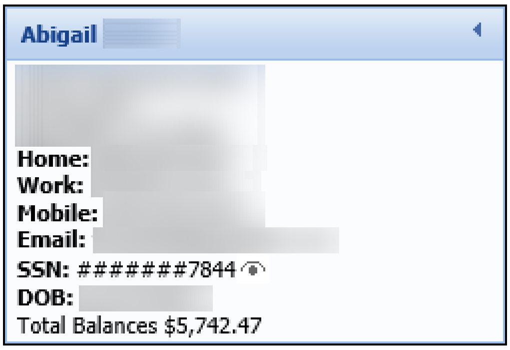
The content in the Person Summary Panel is driven by the person record selected to access the workspace. A person may include multiple person records such as joint checking accounts, third party mortgages, and third party credit cards that are grouped by SSN under a single Person Master record. This may cause a variation in the name displayed, as well as the home address. If a person record does not have a home address, any address associated to the person master record may be displayed.

By default, the system populates the most recent address record for the person in the Person Summary Panel. If that record has a blank value for Address 1 in the database, the system automatically populates the next most recent address that includes a value for Address 1.

The phone numbers displayed in the Person Summary panel are related to the record for the person-in-context.

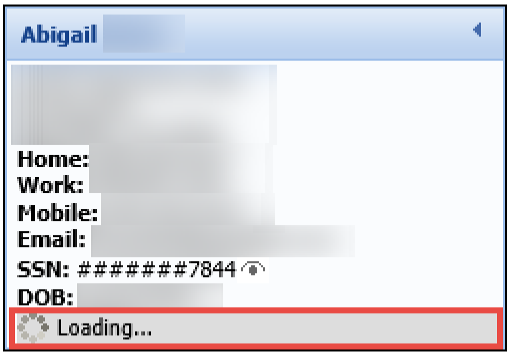
System administrators have the ability to determine whether phone numbers related to closed accounts appear in the Other Phones window. If the parameter is set to false by the system administrator, any phone numbers related to closed accounts for the PersonMasterID are excluded from the list that appears in the Other Phones window. If the parameter is set to true, the list includes all phone numbers for the PersonMasterID, including the numbers associated with any closed accounts.

Additionally, users may be able to call an account holder by clicking on the phone numbers in the Person Summary Panel, based on a configuration made in System Management.



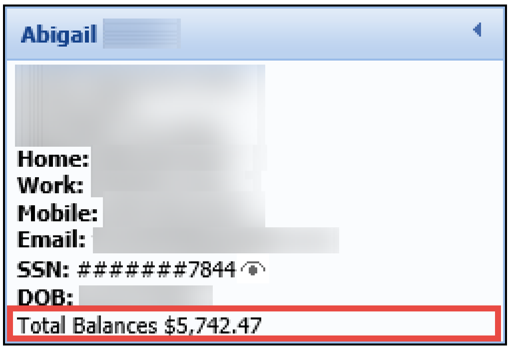
The Person Summary Panel does not display duplicate phone numbers of the same Type. For example, if a Home phone number and Mobile phone number share the same Phone Number, both the Home and Mobile phone numbers display. However, if two Home Phone Numbers are entered with the same Phone Number, only one Home phone number displays.

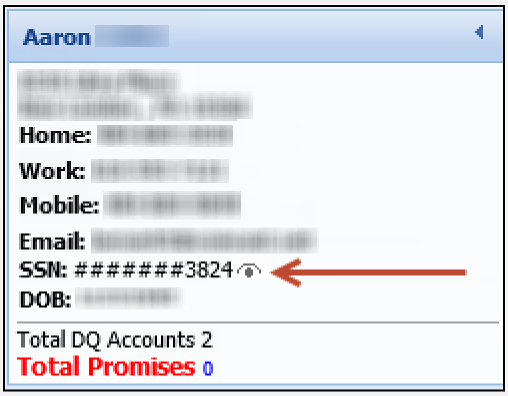
Administrators can also configure additional data to appear in the Person Summary by assigning Presentation rules to this area of the workspace. If rules are assigned to this area, a message displays within the panel to notify that rules are executing:



The additional data configured through rules appears below the current system-defined information once the workspace has completely loaded.

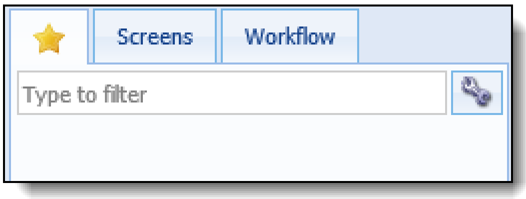
> When data is updated within the Person Summary panel during the real-time refresh process, any Presentation rules assigned to the area automatically re-run to display the most up to date information for the person.



> A tooltip is included in the Person Summary panel to display only the last four digits of a Social Security number. The rest of the SSN is masked until the icon next to the SSN is clicked to display the full number. When the click is released, the masked SSN displays once again. SSN masking cannot be disabled as PCI compliance dictates an SSN cannot be displayed in clear text on a screen.
>
> > The ability to unmask the value of the SSN is determined by the system administrator. If a user is not granted permission to view masked fields, a tool-tip is presented to the user upon clicking the icon to identify that permission to unmask the field is not enabled.
>
> 

3 - Left Navigation Panel

The Left Navigation Panel displays three tabs: Favorites, Screens, and Workflows. Use the filter within each tab for easy navigation to items within the lists. Simply type the name of the item that is being searched.

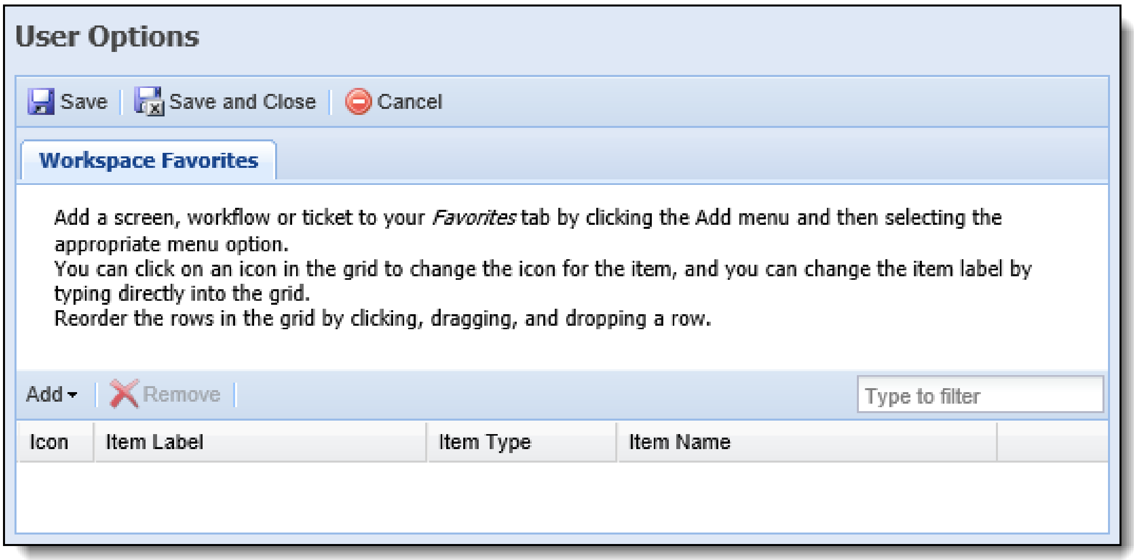


Tab	Description

<table>
<tr>
<td>Favorites</td>
<td>
Contains a list of configured screens and workflows. Commonly used screens and workflows can be added to this list for easier access.
The Favorites tab is configured by selecting the icon.

This tab can also be managed by selecting User Options from the User Menu in the Workspace Ribbon Bar.

Selecting the icon displays the User Options pop-up window.



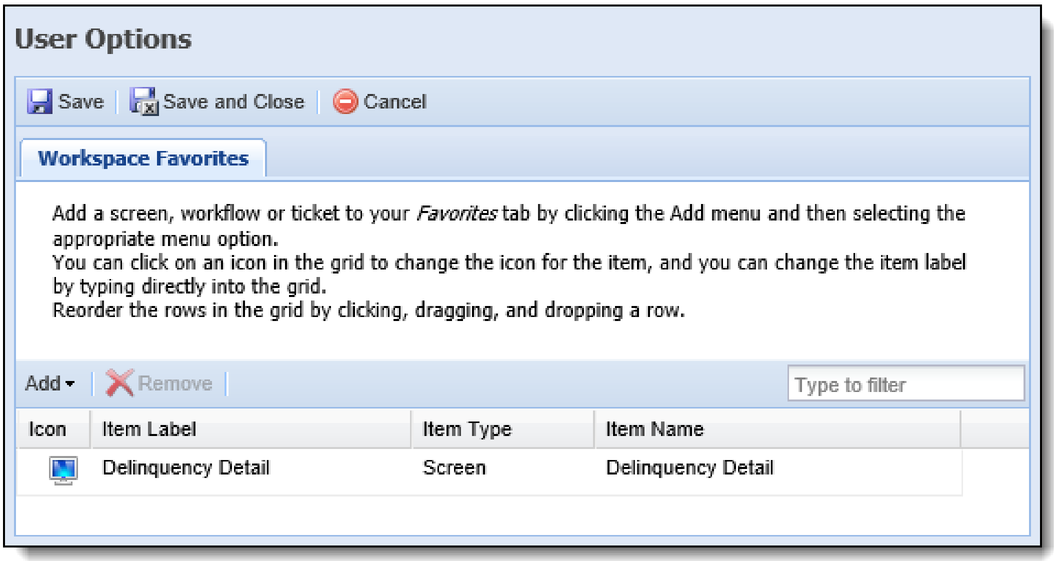
Within User Options, the following actions can be performed to customize the Favorites tab of the workspace:

Add a Favorite

To add a screen to the Favorites tab:

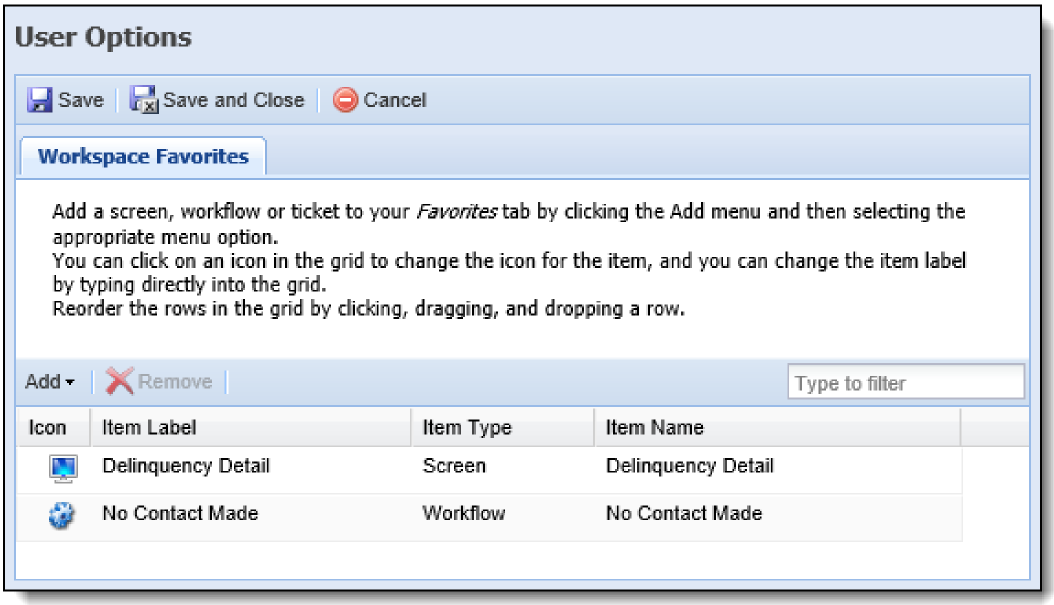
Click the Add drop-down in User Options, and select Screen.
An Add Screen pop-up window appears.
Highlight the desired screen in the list, and click Add Screen.
The Add Screen window closes, and the selected screen appears within the bottom grid of the User Options window.

</td>
</tr>
</table>



To add a workflow to the Favorites tab:

- Select Workflow from the Add drop-down in User Options.
- An Add Workflow pop-up window appears.
- Highlight the desired workflow in the list, and click Add Workflow.
- The Add Workflow window closes, and the selected workflow appears within the bottom grid of the User Options window.



Upon clicking **Save**, the desired items appear in the Favorites tab in the workspace.

Remove a Favorite

To remove an item from the Favorites tab:

- Highlight the item to be removed within the User Options window, and click Remove.

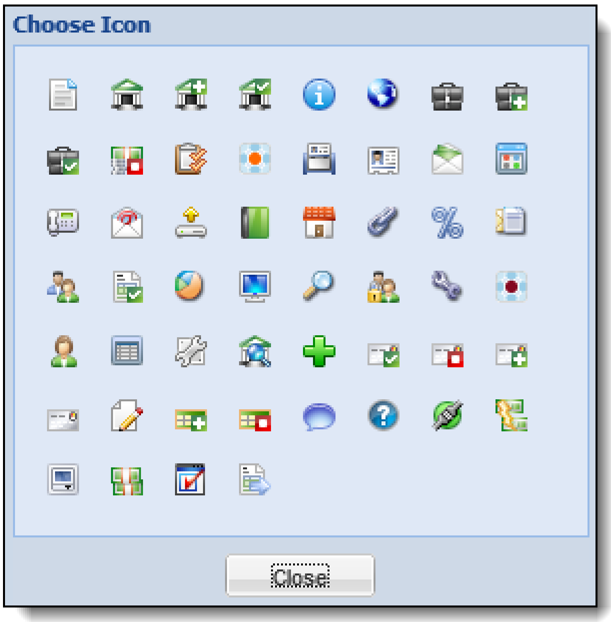
> The Remove button is not enabled until an item is selected within the grid.

- Upon clicking Remove, the selected item deletes from the bottom grid.
- Once the User Options window is saved, the selected item is removed from the Favorites tab in the workspace.

Configure icons or labels

To change the icon that appears for a specific item within the Favorites tab:

- Click on the icon to be changed within the User Options grid.
- A **Choose Icon** window appears. Select a new icon for the item from the choices displayed:

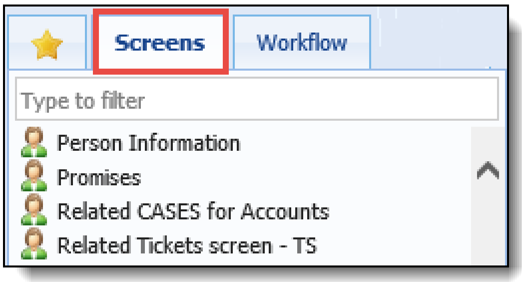
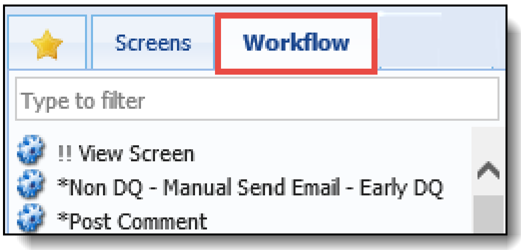


- Once an icon is selected, click **Close** to return the User Options window.
- The new icon appears under the Icon column the grid.

To change the name that appears for a specific screen or workflow within the Favorites tab:

- Click on the name of the item within the **Item Label** column. The field becomes editable and allows for changes to be made to the label.
- Once all changes have been made to the label, click outside of the Item Label field.
- Upon clicking **Save**, the configurations made to the icons or labels appear within the Favorites tab in the workspace.

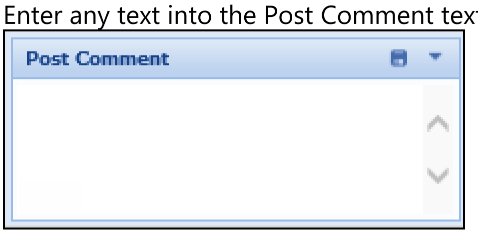
Click **Save** when all User Option configurations have been made. A success message appears confirming that the User Option saved successfully. Selecting **Save and Close** retains the changes made, and returns to the workspace. Once all User Options have been saved successfully, the changes appear within the Favorites tab in the workspace.

Screens	Contains a list of available screens. These screens are configured by the system administrator in System Management > **Screens**. The screens that appear in this list depend on the type of account or case in context in the workspace.  For each screen, icons display to identify if the Screen is Person, Account, or Case related. The icons are as follows: •  - Account screen •  - Person Screen •  - Case Screen
Workflows	Contains a list of available workflows. These workflows are configured by the system administrator in System Management > Workflow > Workflows. The workflows that appear in this list depend on the type of account or case in context in the workspace. 

4 - Post Comment Box

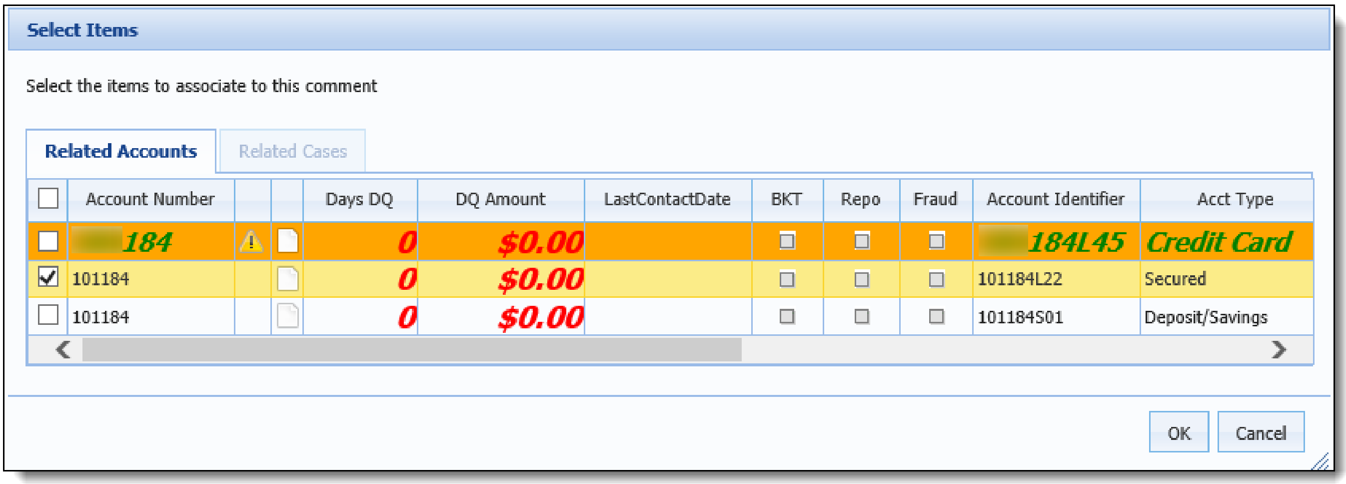
The **Post Comment Box** appears on the left navigation panel of the workspace. Comments are automatically posted to the person's workspace. Comments can be associated to specific accounts and cases ,in addition to the account holder.

Enter any text into the Post Comment text box.



To post the comment click the  icon. A Select Items pop-up window appears to associate accounts or cases to that comment.

> Depending on configurations made by the system administrator, the row for a delinquent account may display in different text and/or background color than a row for an account that is current, as shown in the below example. For more information, please see the Top Area Screen section of this topic.



After selecting the accounts and/or cases, click **OK** to post the comment. The comment appears on the Workflow History screen.

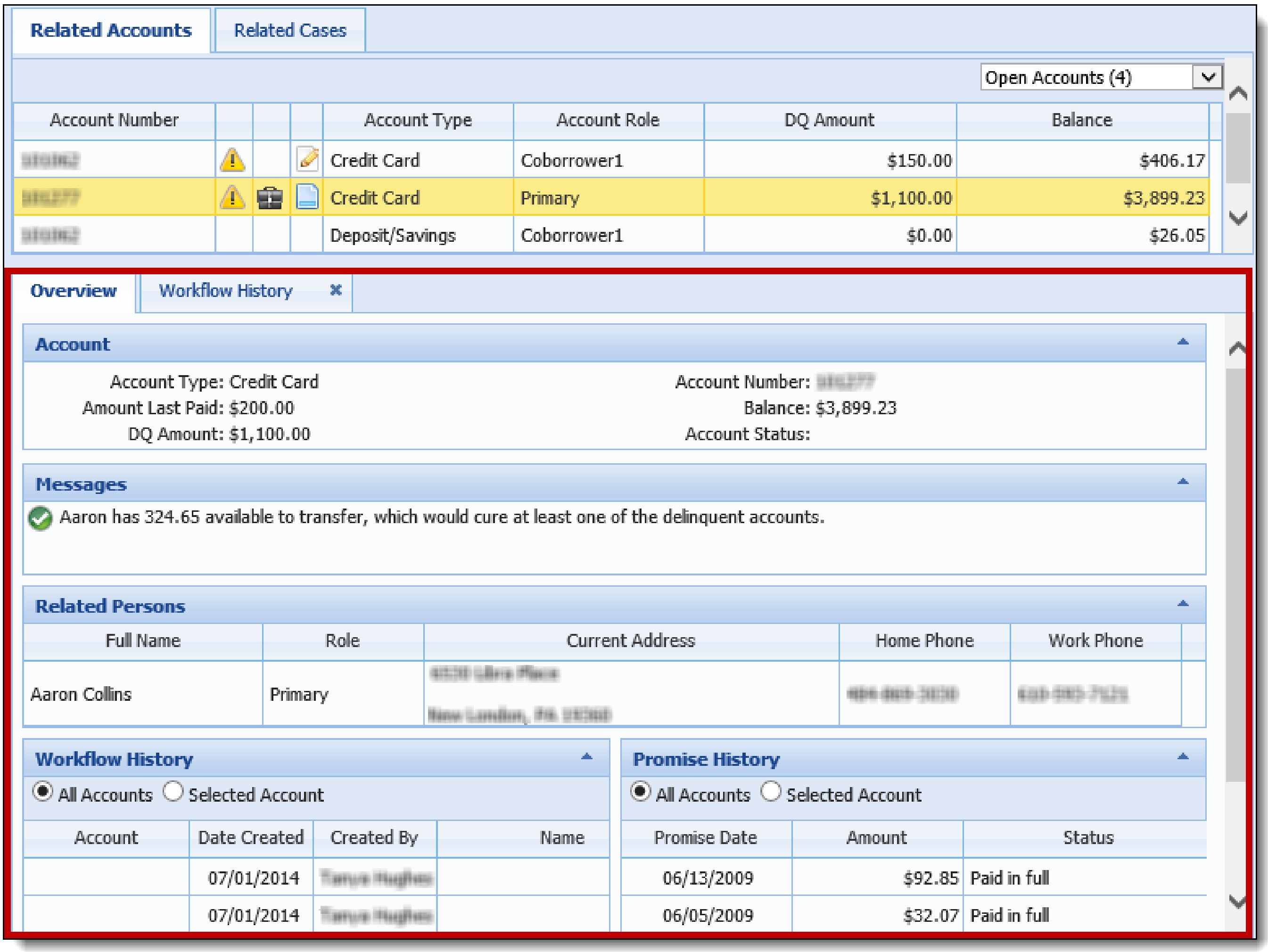
> Selecting an account or case is not required in order to post a comment. If an account or case is in context when posting a comment, that account or case is selected by default. If an account or case is not selected, the comment is posted for the person.

To collapse the Post Comment Box, click the icon. When the Post Comment Box is empty, clicking the icon also collapses the box.

5 - Overview Screen

The **Overview Screen** appears in the lower section of the workspace, and is used to display information on the person being worked, as well as the account or case in context.

> This screen cannot be closed.



The screens that preload within the workspace load based on the person, account, and case types in context, when the workspace initially loads or is refreshed. For example, if a person record is used to access the workspace, only person screens display within the Overview screen.

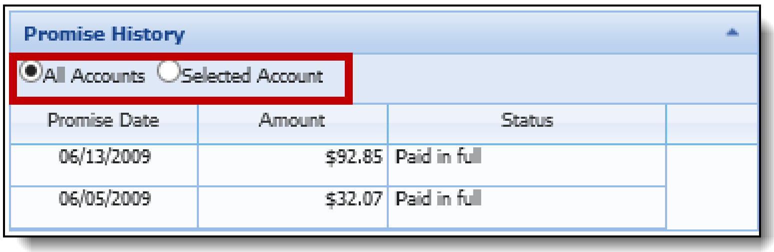
The following matrix provides an overview of the screens that preload in the workspace based on the item in context:

Person	Account	Case	Screens Preloaded in Workspace
✓			Person
✓	✓		Person Account screens matching the account type
✓		✓	Person Case screens matching the case type
✓	✓	✓	Person Account screens matching the account type Case screens matching the case type

> As the selected account/case in the workspace changes, the preloaded screens for that account/case type will not be loaded. Preloaded screens are only used when initially loading the workspace.

Information within some panels displayed in the Overview screen can be viewed for all accounts or only the selected account by clicking **All Accounts** or **Selected Account** within the panel.

Panels default to a selection of All Accounts.



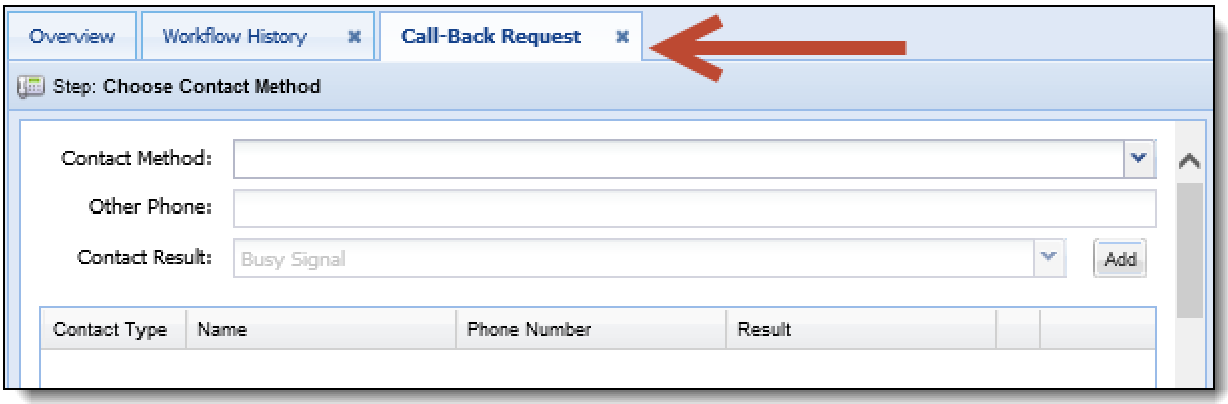
Through some panels, screens can be accessed, and other workspaces can be opened. For example, if the overview screen is configured to include the Related Persons panel, clicking on a Person within that panel displays a new workspace for that related person in a separate tab.

Information for a Joint account holder, such as the Joint account holder's primary address, appears in the Related Persons panel when the panel is configured to appear in the Workspace Overview.

If a related person is restricted, the person is not displayed in the related persons panel. Also, any accounts associated to the restricted person do not display in the Related Accounts.

Similarly, clicking on a workflow on the Workflow History Panel opens the Workflow History screen.

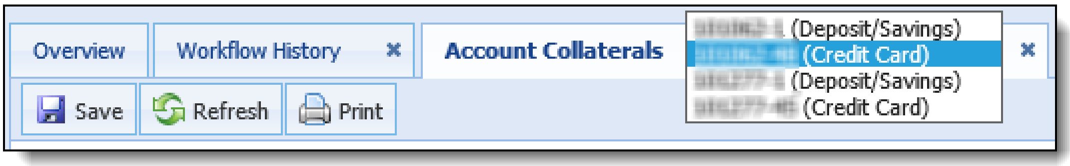
When accessing screens and executing workflows for a person, account, or case, the screen or workflow tab loads next to the Overview tab as shown below:



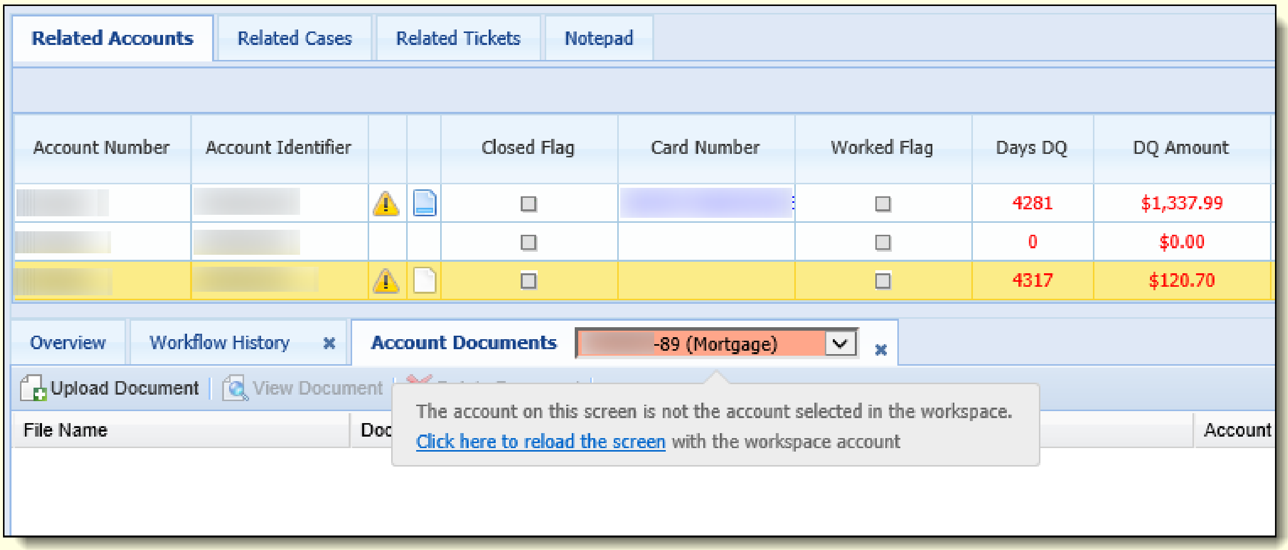
The information displayed within the Overview screen automatically refreshes upon the selection of a new account or case in the Related Accounts or Related Cases Panel.

In order for information within a panel on the Overview screen to update as a new account or case is selected within 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.

This automatic refresh does not occur when a new screen is opened. When a new screen is opened in the workspace, the information for the selected account or case displays and does not refresh if a new account or case is chosen within the Related Panels. To change the information that displays on a new Account or Case screen, use the drop-down within the top of the Screen tab.



If the account/case in selected in the Related Account/Case panel does not match the account or case selected in the drop-down, the background of the account/case drop-down displays as red. Users are also presented with a tooltip there is an account mismatch between the item selected in the Related Account/Case panel, and the drop-down. Click the link within the tooltip to reload the screen with the account/case selected in the Related Account/Case panel.

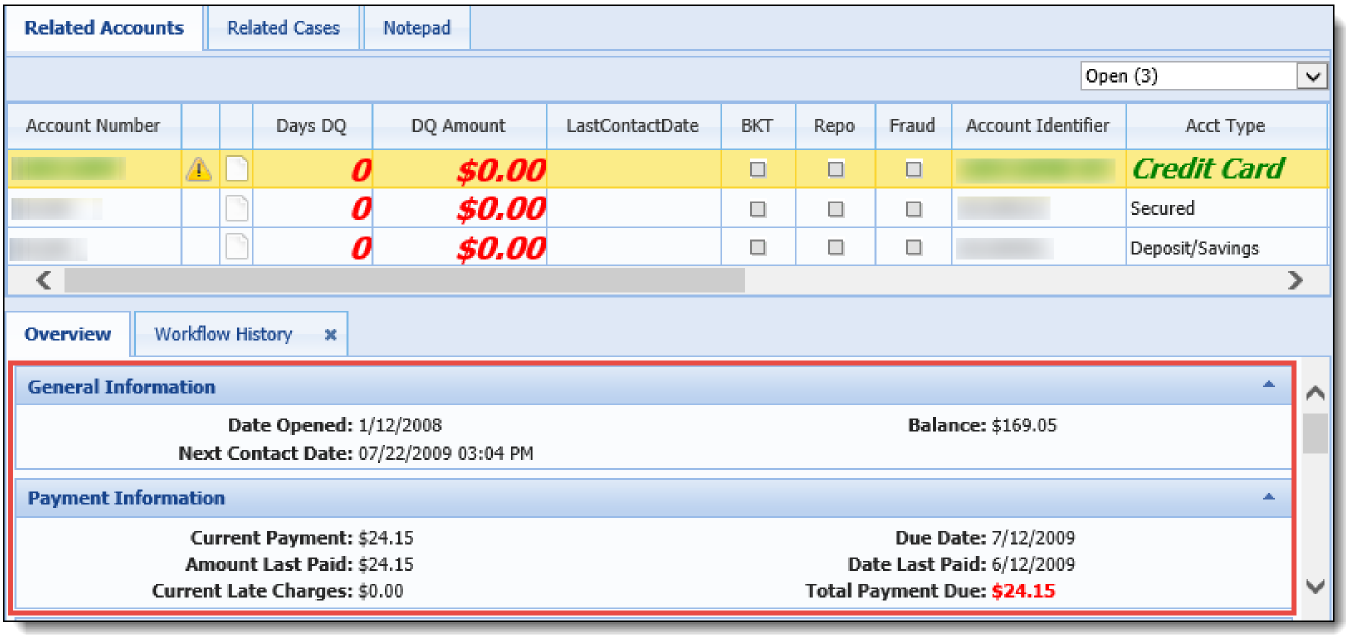


The Overview screen can be configured by system administrators to include Person, Account, or Case panels that populate to display information regarding the specific account or case in context.

If any address, phone or email panels are configured to appear in the Overview screen, the information in these panels cannot be edited as these panels are read-only. For more information on these panels, please see the Screens topic in this guide.

When a new account or case is selected within a related panel, the information automatically refreshes in the Overview to reflect information for the account or case in context. Depending on the configuration of the Overview screen, additional panels may display when users change the account or case in context.

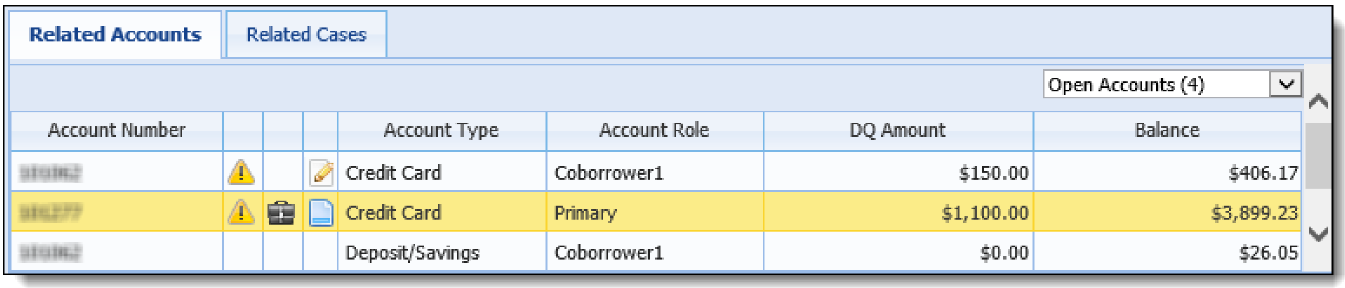
For example, when a user selects a credit card account, panels displaying transaction and payment history related to the account populate in the Overview as shown below:



6 - 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.

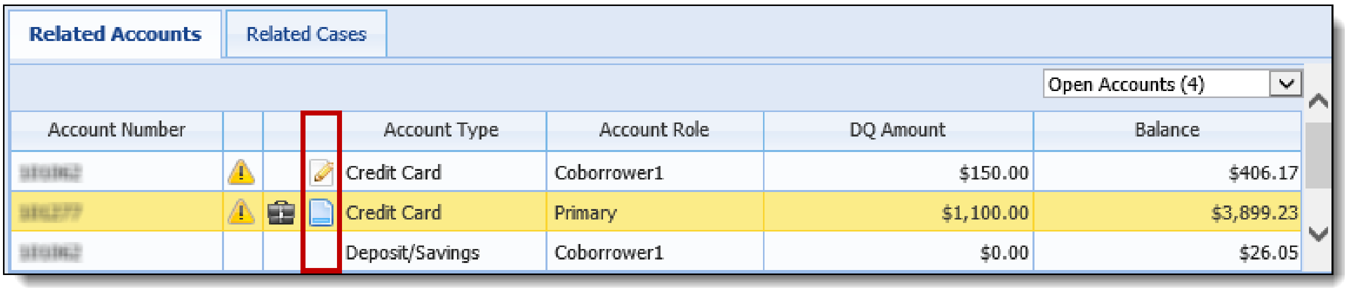
> By default, the Related Accounts panel displays open accounts, sorted in ascending order by Account ID, with the oldest account listed first. Users are able to update the Related Accounts filter to display All, Open, Open Liable, Delinquent, Delinquent Liable, and Closed Accounts. Additionally, users are able to change the sorting order by clicking on a column header.
>
> > Institution administrators are able to configure how the accounts in the Related Account panel are filtered, and sorted within panel's properties in System Management > Screens. If a user changes the filter or sorting within the workspace, refreshing the workspace returns the Related Accounts panel to the default view.
>
> The maximum number of accounts displayed in the panel is controlled by the Max Accounts to Load database parameter. By default, this parameter is set to 150 to display the first 150 accounts for a person in the panel. If an account is not displayed in the Related Accounts grid due to the value set in the Max Accounts to Load parameter, it must be searched for using Temenos Infinity's standard search functionality.
>
> Please contact Temenos if it is desired to change the value of the Max Accounts to Load parameter.



When the real-time refresh process runs, data within the Related Accounts grid is automatically updated to display the most up to date information from the core for the person.

For these panels to display, system administrators must configure a Person screen to include the Related Accounts and Related Cases panels and map it to the top area of the workspace. The fields that display within each panel are configured by the system administrator .

One of the columns that can be configured to display within the Related Accounts panel is **Queue Information**. Queue information alerts users to important queue messages by displaying a queue indicator icon within the column.



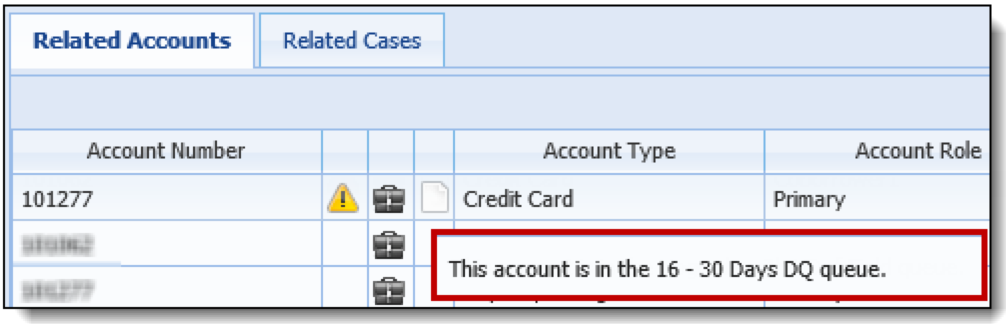
Hovering over the icon displays the following information about the account:

Icon	Description	Tooltip
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.

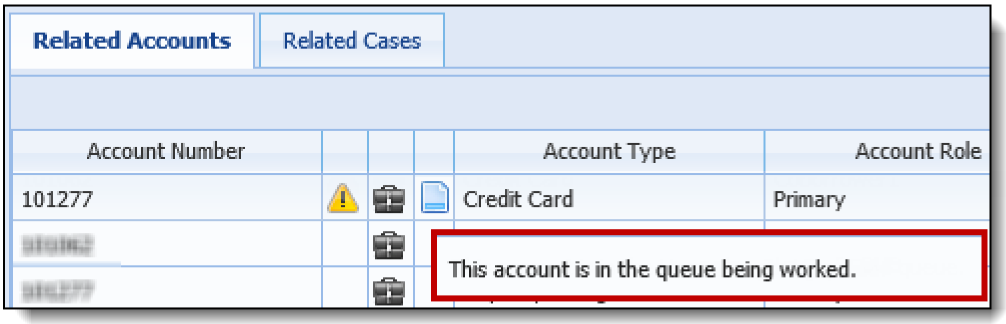
	The account is in a different queue and must be worked before selecting Get Next.	This account is in the [name of queue] queue and must be worked before getting next.

The functionality of the Queue Information icon and icon is determined by the Get Next setting configured by the system administrator. If no accounts are required to be worked before selecting Get Next, then these icons do not appear.

As queues are changed, the icons update to reflect the queue that is currently being worked. For example, in the screenshot below, the icon appears for account 101277 and identifies that the account is in the 16-30 days DQ queue:



Working the 16-30 days DQ queue updates the Queue Information column to display the icon identifying that the account is in the queue being worked.



If an icon includes a pencil, such as the icon and icon, then a workflow must be run on the account before Get Next can be selected.

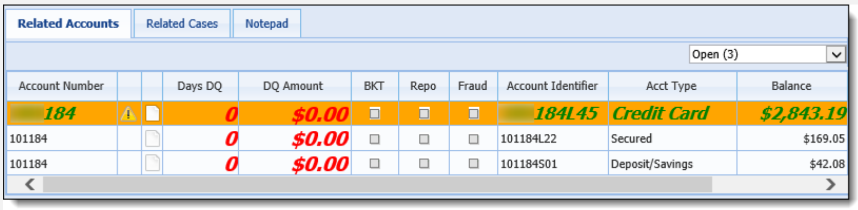
If the workflow run on the account is configured by the system administrator to Deactivate Account in Queue, the account is removed from the queue upon completion of the workflow, and the Queue Indicator icon for the account is also removed from the Related Accounts panel after the workspace is refreshed.

In addition to the Queue Indicator Icons, the following icons can also be configured to appear within a column in the Related Accounts panel, providing immediate access to important account information for the person in context as they are hovered over in the workspace:

<table>
<tr><th>Icon</th><th>Description</th><th>Tooltip</th></tr>
<tr><td></td><td>The account is delinquent.

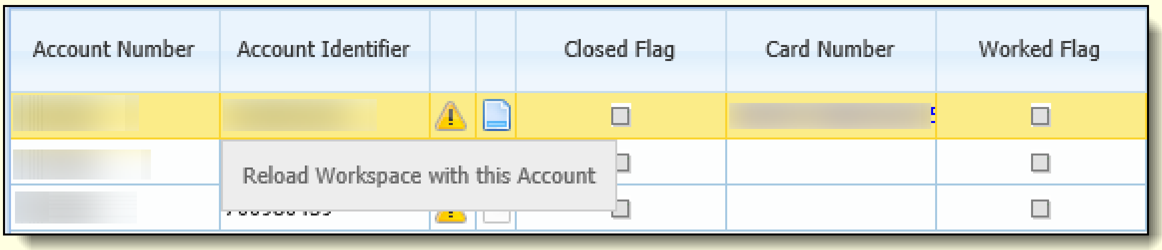
Depending on configurations made by the system administrator, the row for a delinquent account may display in different text and/or background color than a row for an account that is current. In the following example, the Related Accounts panel has been configured to display a different background color and text for delinquent accounts:

When a delinquent account is selected within the panel, the account displays as an active account with a yellow background, and not the background color configured for DQ Accounts. Any style set for the text, such as font size and color, is applied to each value for the delinquent account, but the row does not display the background color until a different account is selected within the grid.

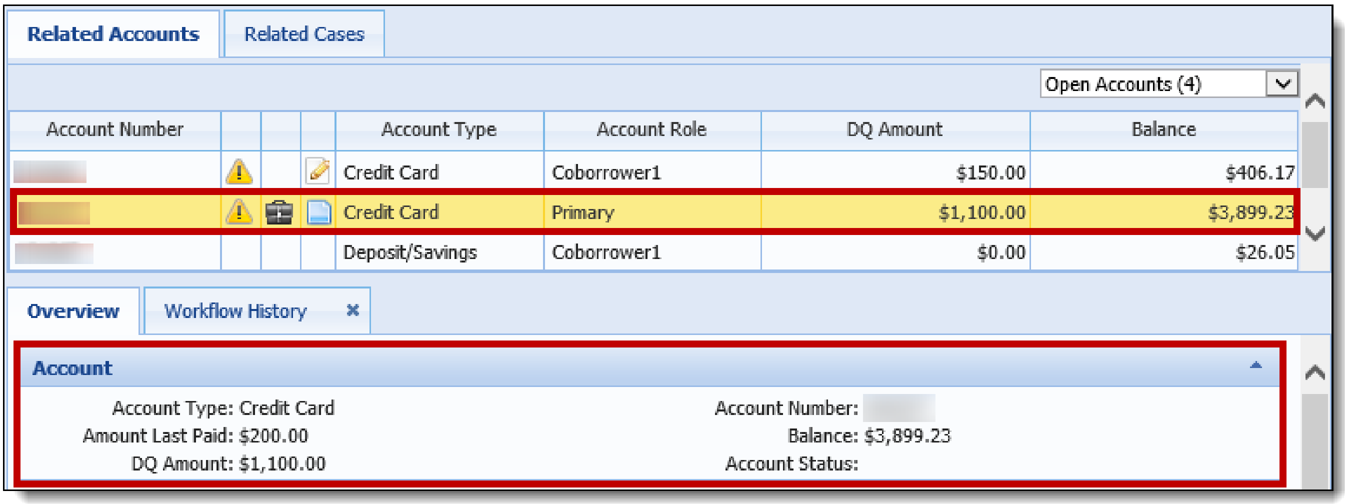

</td><td>This account is delinquent.</td></tr>
<tr><td></td><td>The account is associated with one or more open cases.</td><td>Case Number(s) and Case Type(s).</td></tr>
</table>

Selecting any account or case within the panel highlights the row, and refreshes the contents that pertain to the selected account or case in the workspace Overview.

Right-clicking on a row in the Related Accounts/Cases panel provides users the option to reload the workspace with the account/case in context.



If any address, phone or email panels are configured in the top area screen, the information in these panels cannot be edited as these panels are read-only.

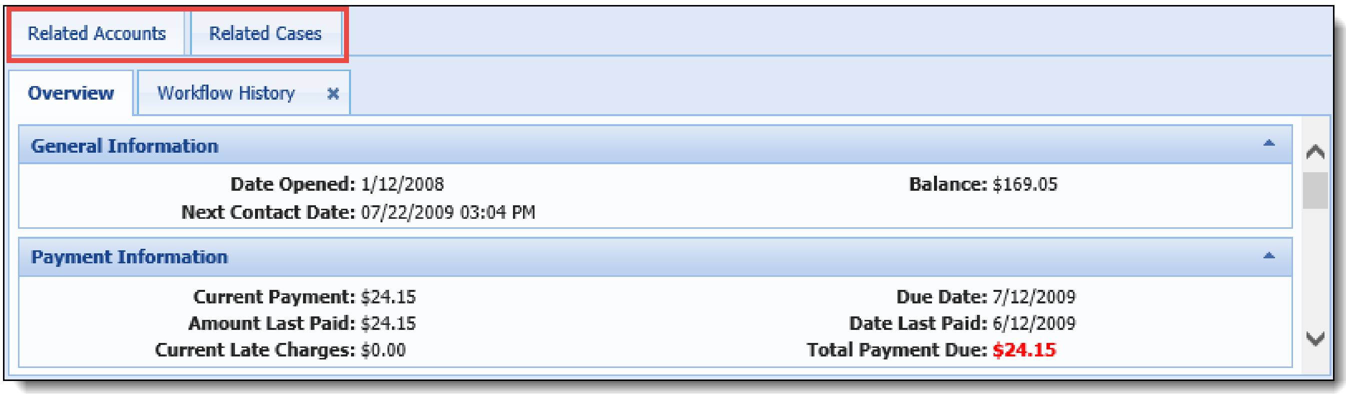


Use the drop-down in the top right-hand corner of the Related Accounts panel to determine if All Accounts, Open, Open Liable, Delinquent, Delinquent Liable, or Closed accounts display within the panel.

This drop-down defaults to Open Accounts.

A person is liable on an account if their Role Type on the account is set to Liable as configured by a system administrator.

The top area screen is collapsible by clicking on one of the tabs that display on the screen.

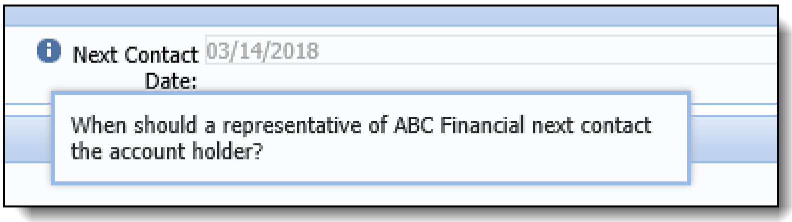


Workspace Tips and Tricks

Temenos Infinity provides many features that allow for seamless navigation.

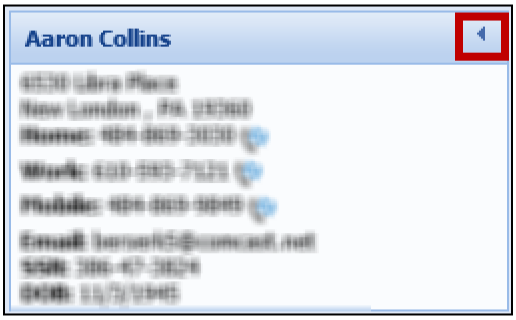
Tooltips

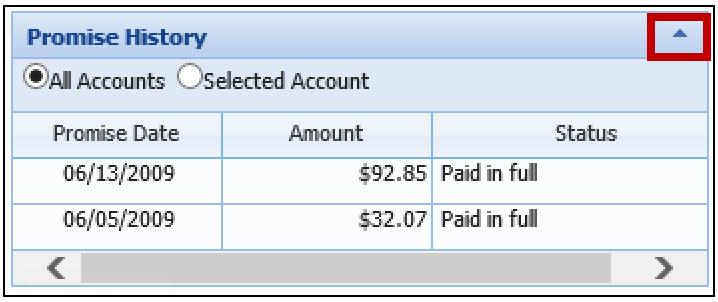
When a tooltip is configured for a field, ⓘ displays to the left of the field label. Hover over the ⓘ to reveal the tooltip.



Collapsing Areas within the Workspace

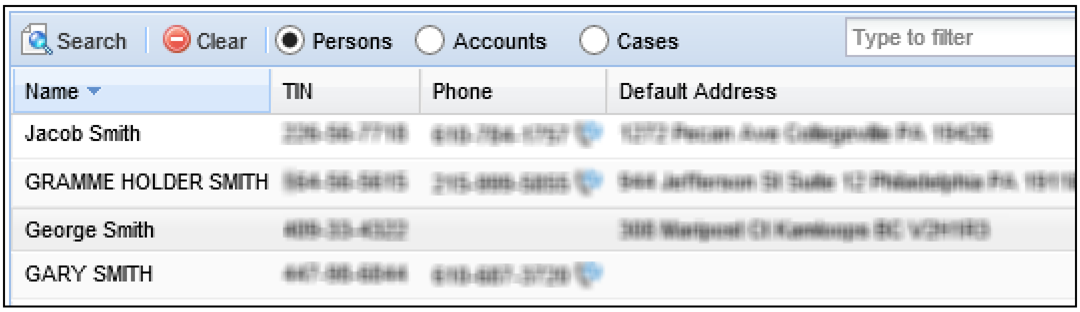
Certain areas of the workspace offer a collapse option to help manage space on the screen. Clicking the arrow within the header collapses the area.



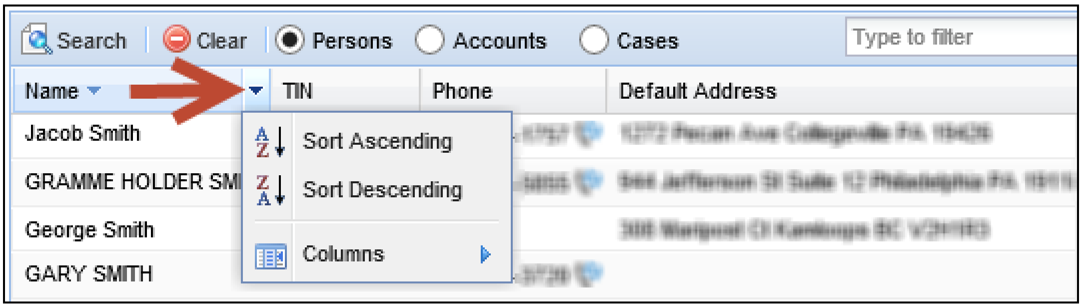


Column Organization

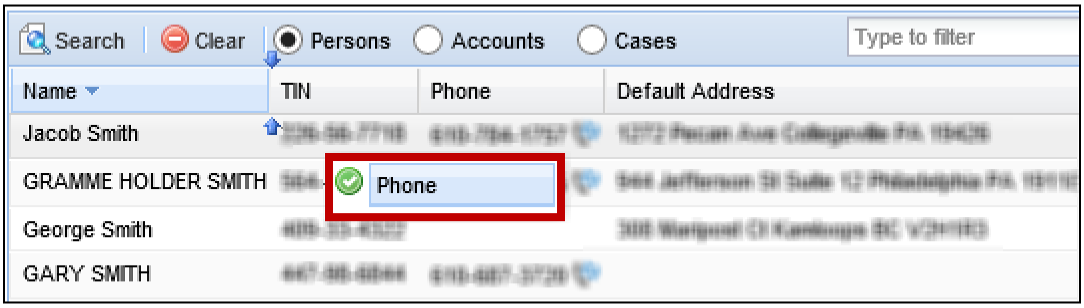
Tables throughout Temenos Infinity allow users to organize columns by ascending/descending order, by adding existing columns to a table, or by moving columns. Clicking the column header toggles listings between ascending and descending order.



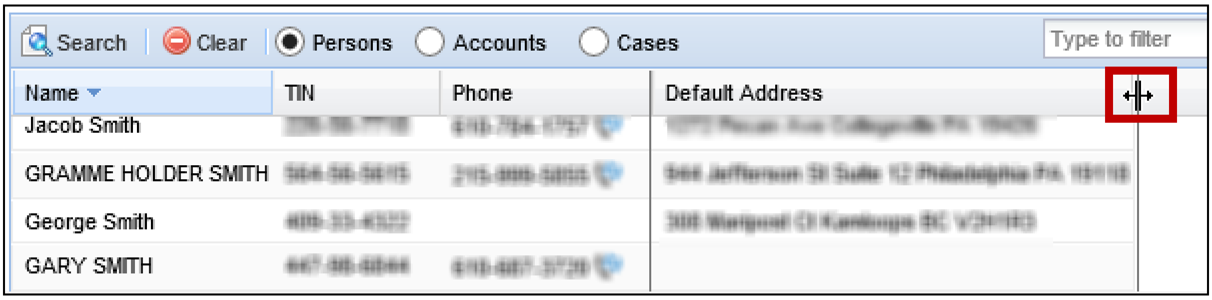
Users can also toggle between ascending and descending organization by clicking the column header drop down as shown below.



To organize organize column layout, click and drag a column header to the desired location. Columns are able to be placed when a green check mark appears as shown below.

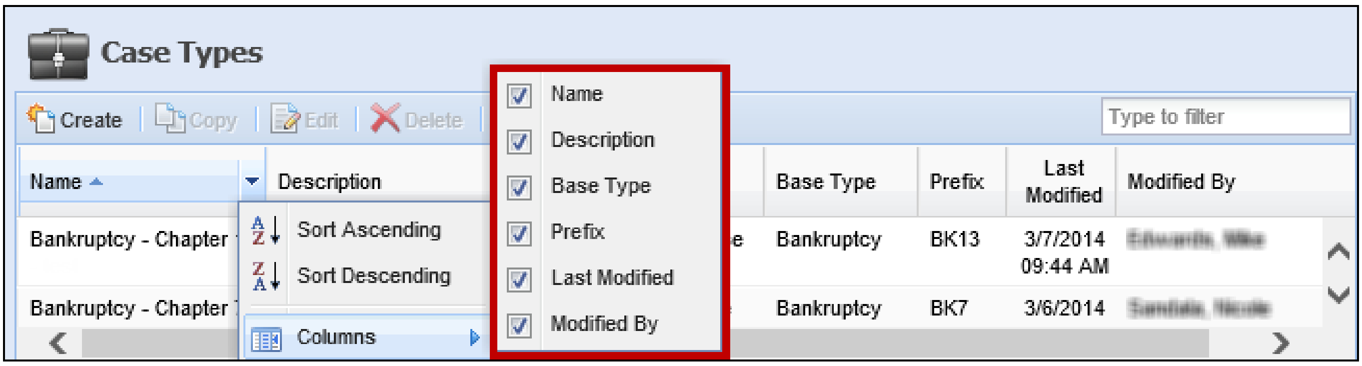


Columns and tables can be re-sized when presented with the re-size cursor as shown below. Click and drag to the desired size.



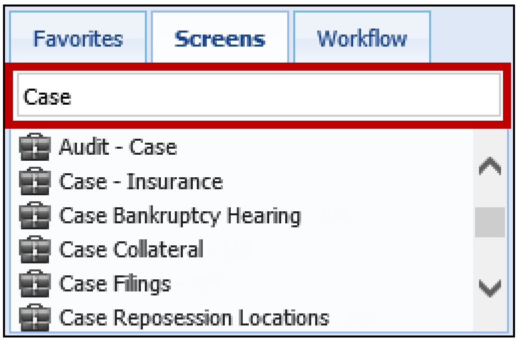
> When items are re-sized they are saved in that format unless changed. For example, when the Default Address column on the Search screen is re-sized, it appears in that format when the Search screen is re-opened.

In some cases, users can add columns based on pre-defined fields. To add columns, click the column header drop-down and expand the Columns option. Select check boxes for the columns that are to be included on the screen. For example, the Case Types screen has several fields that can be included to display case type information on this screen.

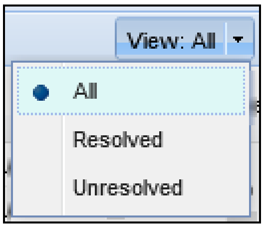


Filters

Many areas throughout Temenos Infinity allow users to filter lists for easier navigation. Typing in a whole or partial name in a designated filter box automatically filters lists based on the entry. To remove the filter, simply clear the text from the filter box.



Certain lists also have views associated to them. Users can click the **View** drop-down to display results only associated to a certain view.

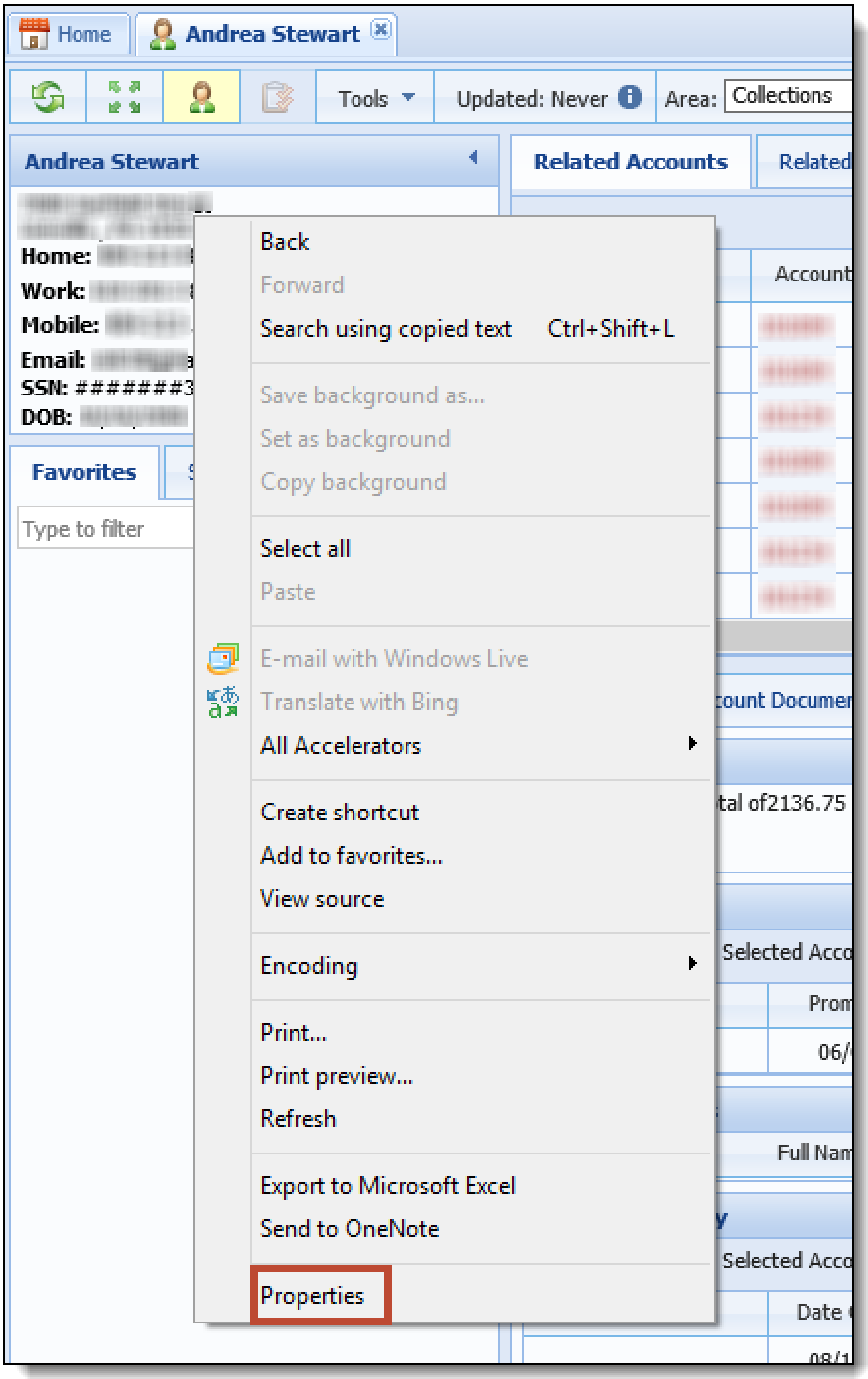


> When a page is filtered that has a View drop-down and a filter is typed in, selecting a different view negates the filter and displays a full list of the items associated with the view. To have the filter take over from this view, click the cursor in the filter box to reinstate the filter.

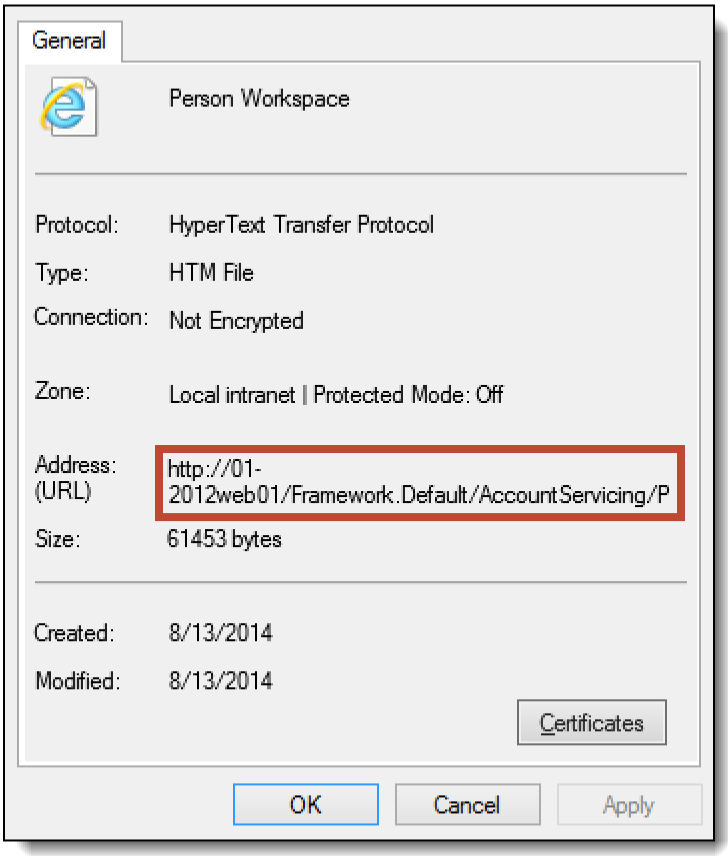
Checking Load Time of the Workspace

To troubleshoot performance-related issues, Temenos Customer Care might request that the load time of the workspace is reviewed.

From the workspace, right-click anywhere and select **Properties**.

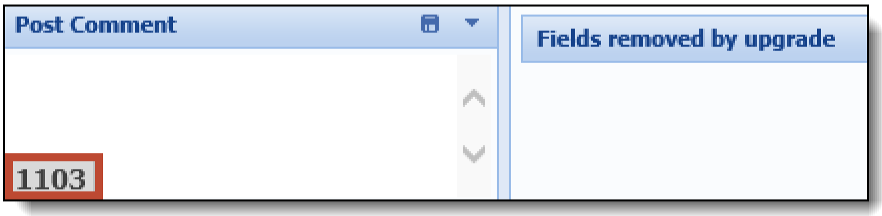


The Properties window displays. Copy the entire Address (URL).

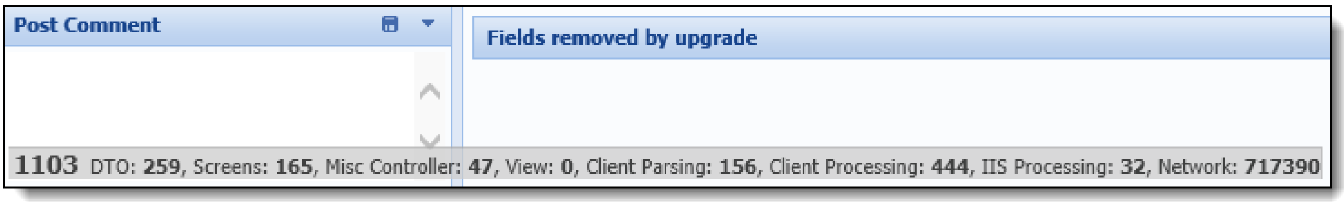


Open a new Internet Explorer tab and paste the URL into the address bar, adding the following to the end of the URL: &showstats=1.

Hit Enter on the keyboard. A new workspace for the same person displays with a number displayed in the bottom left-hand corner.



Click the number to display more information.



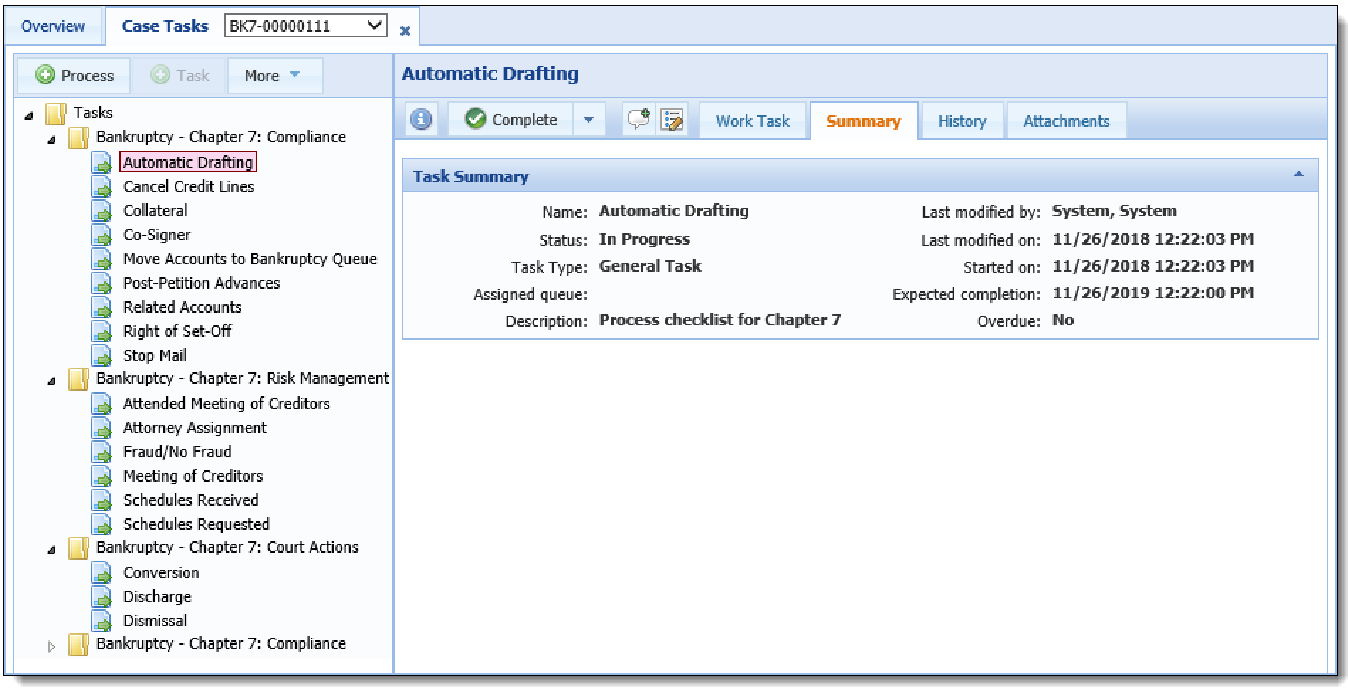
This information is provided to Temenos Customer Care.

Framework Features

Cases

Cases enable the tracking of specialty processes within Temenos Infinity. Cases provide a streamlined method of tracking processes such as bankruptcies, foreclosures, and repossessions, and are easily customizable by a System Administrator.

A case in context is displayed as a Case Tasks tab in the Overview section of the workspace. This tab contains a task navigation panel in the left side of the screen and Case Task Details, organized as tabs in the main area of the screen.



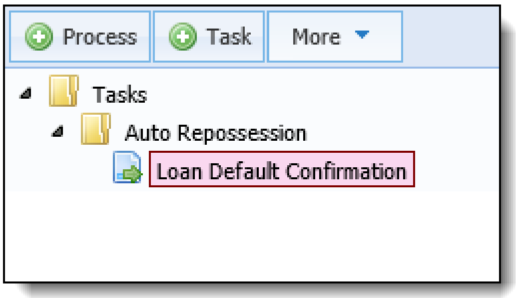
If no task is in context, the main area of the screen displays a "Select a task from the tree to the left" message.

If a task is in context, the main area displays the name of the task and the task details.

> If a person has multiple cases associated to them, a drop-down list is included in the Case Tasks tab to quickly navigate between cases.

Task Navigation Panel

The task navigation panel displays the tasks that have been scheduled to be worked to complete the case. Tasks display in a tree that groups individual tasks into processes which have been assigned to a case type by an administrator. From the task navigation panel, users can open a task, add additional tasks and case processes to the case, and cancel case processes.



If no processes or tasks exist on a Case, the system prompts users to close the case, when the task tree refreshes.

The task tree loads in the following scenarios:

- Case status changes
- Completing a task
- Canceling a task

Task Statuses

A Task Status is assigned to a task to indicate the state of the task. There are three states of task statuses: Active, Inactive, and Closed.

- **Active:** A task that is being worked or scheduled to be worked to complete a case. These tasks must be resolved and closed. There are two active statuses: In Progress and Waiting to Start.

  The task navigation panel only displays tasks that have an active status.

- **Inactive:** A task that is dependent on the result of an Active task. The only inactive status is Not Started.

  Inactive tasks are not visible to the user. These tasks automatically populate in the task tree when a closed task returns results that activate these tasks.

- **Closed:** A task that has been resolved. There are three closed statuses: Completed, Canceled, and Will Not Start.

When a case is created, every task in that case type is assigned a Task Status. Users can change task statuses by completing or canceling tasks.

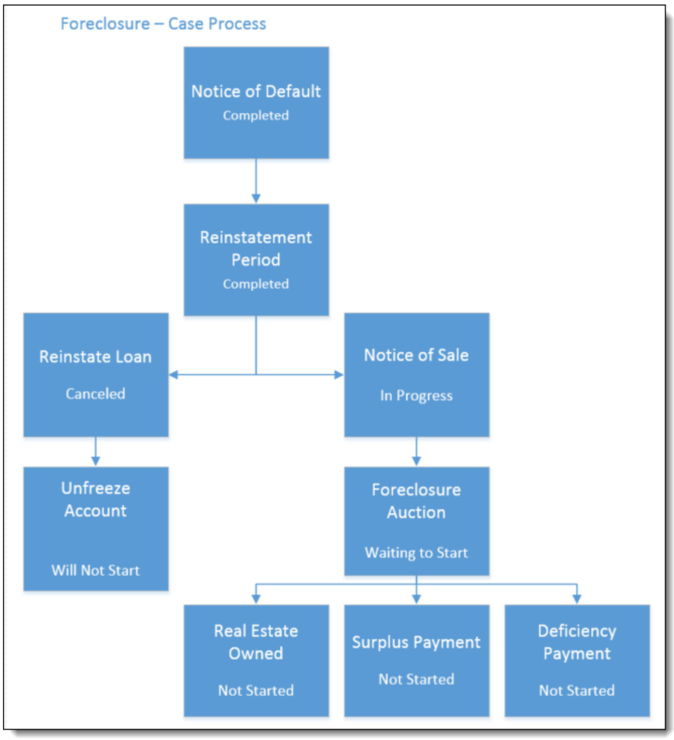
The below foreclosure case process example provides a reference for all the Task Statuses in Temenos Infinity.

In Progress

A task that is either ready to be worked or currently being worked. Users can close In Progress tasks by completing or canceling them.

In the Foreclosure Case Process example, the Notice of Sale task is currently being worked and is In Progress.

> When a task is In Progress, a displays next to the task in the task navigation panel.



Waiting to Start

A task that is scheduled to be worked at a delayed start time. Once this task is started it has a status of In Progress.

In the Foreclosure Case Process example, the Foreclosure Auction task is delayed from starting to allow time to pass from the time that the Notice of Sale is completed and has a Waiting to Start status.

> When a task is Waiting to Start, a displays next to the task in the task navigation panel.

Completed

A task that has been worked to completion and is considered closed.

In the Foreclosure Case Process example, the Notice of Default and the Reinstatement Period have been completed by the user and have Completed statuses.

> When a task is Completed, a displays next to the task in the task navigation panel.

Canceled

A task that is manually closed by a user without being completed.

In the Foreclosure Case Process example, the Reinstate Loan Task was canceled because the account holder failed to make the delinquent payments. This task has a status of Canceled.

> When a task is Canceled, a displays next to the task in the task navigation panel.

Not Started

A task that is dependent on an active task. Depending on the results returned when an active task is closed, a task that is Not Started becomes either active with a status of

In Progress or Waiting to Start, or closed with a status of Will Not Start.

In the Foreclosure Case Process example, the Real Estate Owned, Surplus Payment, and Deficiency Payment tasks have statuses of Not Started. This is because they are dependent on the result of the Foreclosure Auction that has not yet taken place.

Will Not Start

A task that is dependent on a closed task and the results necessary to start the task have not been returned.

In the Foreclosure Case Process example, the Unfreeze Accounts task has a status of Will Not Start. This task will not be used because the Reinstate Loan task has been canceled.

> Tasks are ordered in the task navigation panel by the task start date, which is set when a task status changes from Not Started to either Waiting to Start on In Process. If tasks share the same start date, the tasks with the same start date are ordered by task name.

Case Task Details

When a task is selected from the task tree, it opens in the main area of the case and provides task details grouped into tabs. The task's Work Task, Summary, History, and Attachments details are system defined screens. By default, when opening a task the Work Task tab is displayed.

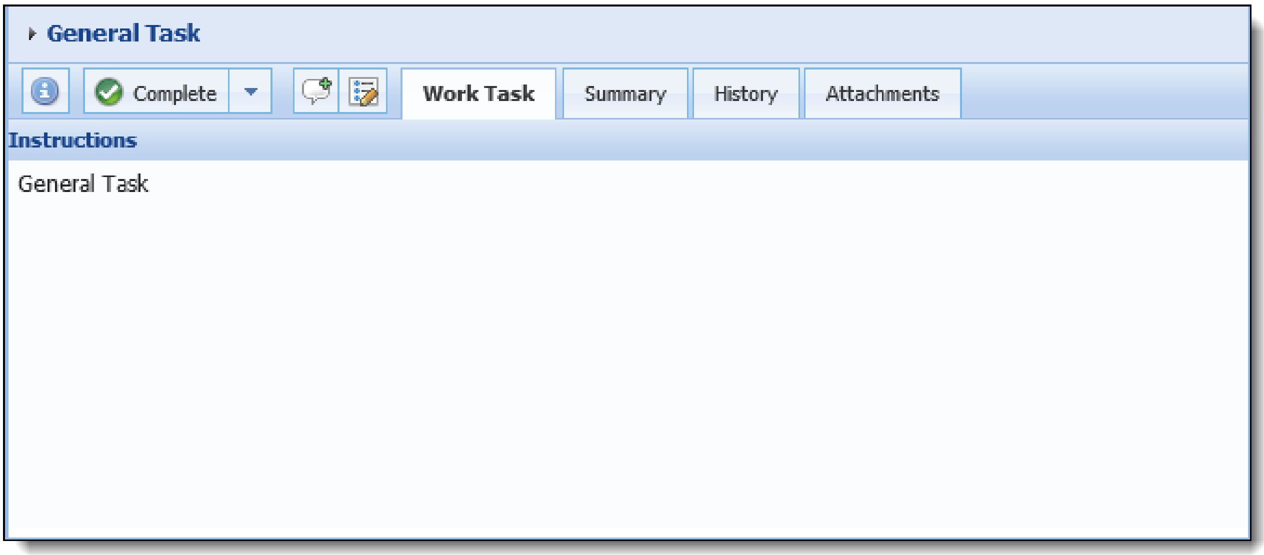
Work Task

The Work Task screen is used to complete all the work needed for a task. The work task details vary based on Task Type and change when a task changes status types from Active to Closed.

> To view instructions on how to complete a task, click in the task toolbar.

General

The General task type provides instructions for users to complete a basic business process such as Seizing Vehicles in an Auto Repossession case.



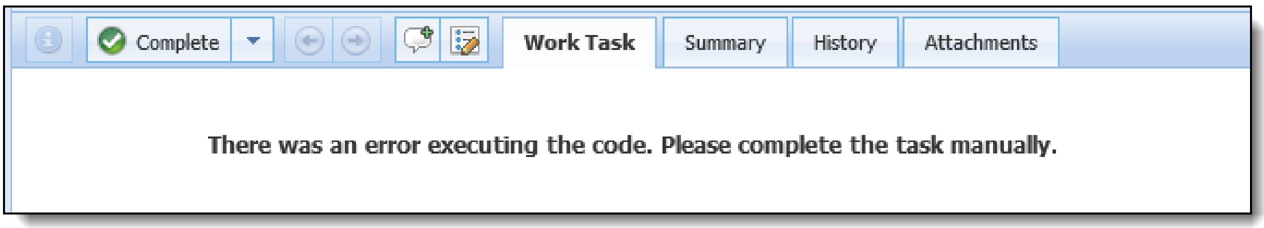
The status of a general task does not affect the content of the Work Task tab. Instructions are always displayed in the same format.

Execute Code

When the Execute Code task type is started, it is automated to run code to accomplish tasks such as evaluating data and interacting with systems outside Temenos Infinity. If the task is completed, results automatically activate the next task in the case.

On the Work Task screen, a message is displayed that varies depending on the status of the task:

- If the code runs successfully and the task is Completed, the work task screen displays a success message.
- If the code fails and the task is still In Progress, the work task screen displays a message stating "There was an error executing the code. Please complete the task manually." The user has to follow the instructions of the task to complete the task.
- If the task is Canceled, the work task screen displays a message stating "The task has been canceled."



More information about why the code has failed can be found in the event log. Access the event log by selecting Events from the Help drop-down in the Ribbon Bar.

Workflow

Workflows are predefined 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. In the Foreclosure Case Process example, the Reinstate Loan is a workflow task that consists of multiple steps that need to be completed to reinstate a mortgage loan.

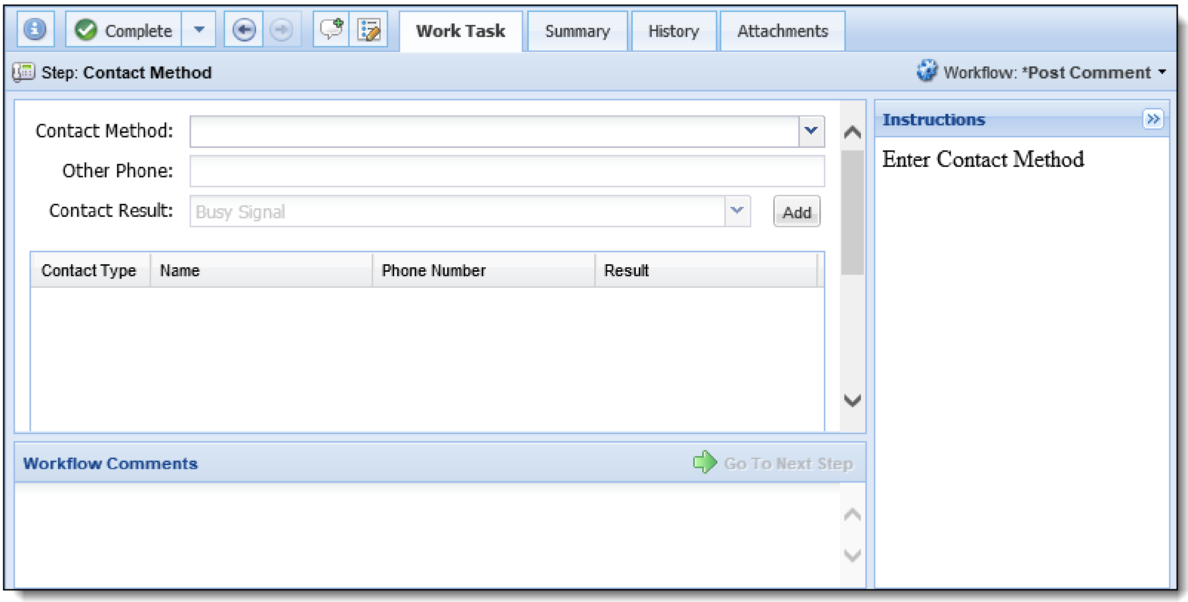
On the Work Task screen, a hyperlinked message displays and varies depending on the status of the Workflow.

- If the workflow has not been started, "Start the Workflow." displays. Clicking Start opens the workflow in the Work Task screen.

  > If no account is in context, clicking **Start** displays a pop up window containing the related accounts and related cases grid. Account(s) and/or case(s) must be selected to run the workflow.

- If the workflow is in progress, "The workflow is in progress. Continue the workflow." displays. Clicking Continue opens the workflow to the current workflow step.

  When a workflow is opened through a workflow task, it displays within the work task screen.

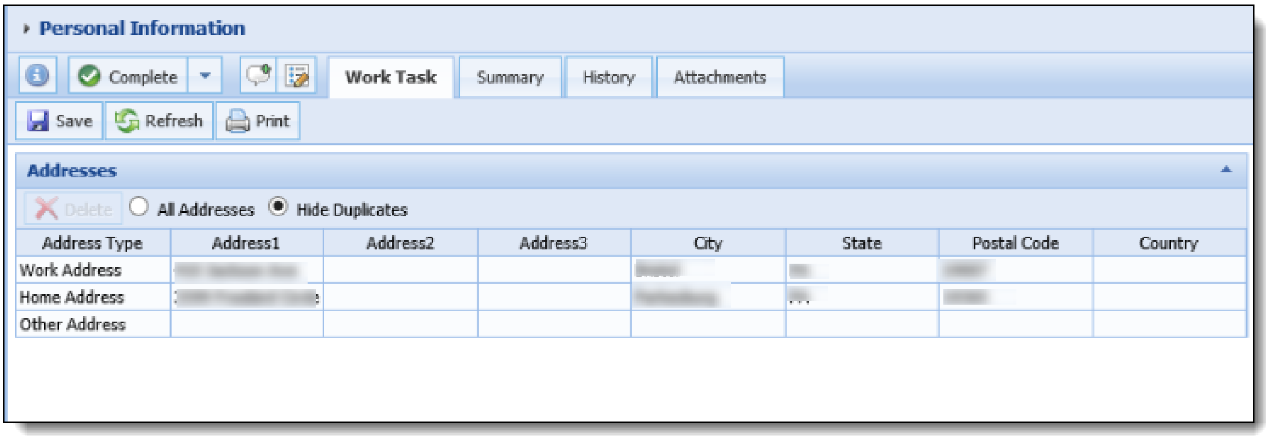


- If the workflow has been completed, "The workflow has completed. View the workflow details." displays. Clicking View opens the Workflow History Detail Screen in a new window.

> When a workflow exists within a task, the following behavior applies:
>
> - If the workflow is completed within the task, the task is automatically completed.
> - If the workflow is completed outside the task, such as in the workspace, the task remains open and the user must complete it.
> - If the workflow is canceled (within or outside the task), the task remains open and the user must complete it.
>
> If the workflow is configured to Count as Worked, the Case > Accounts > Account Flags > Worked Flag is NOT set to true when the workflow is run through a case task.

Screen

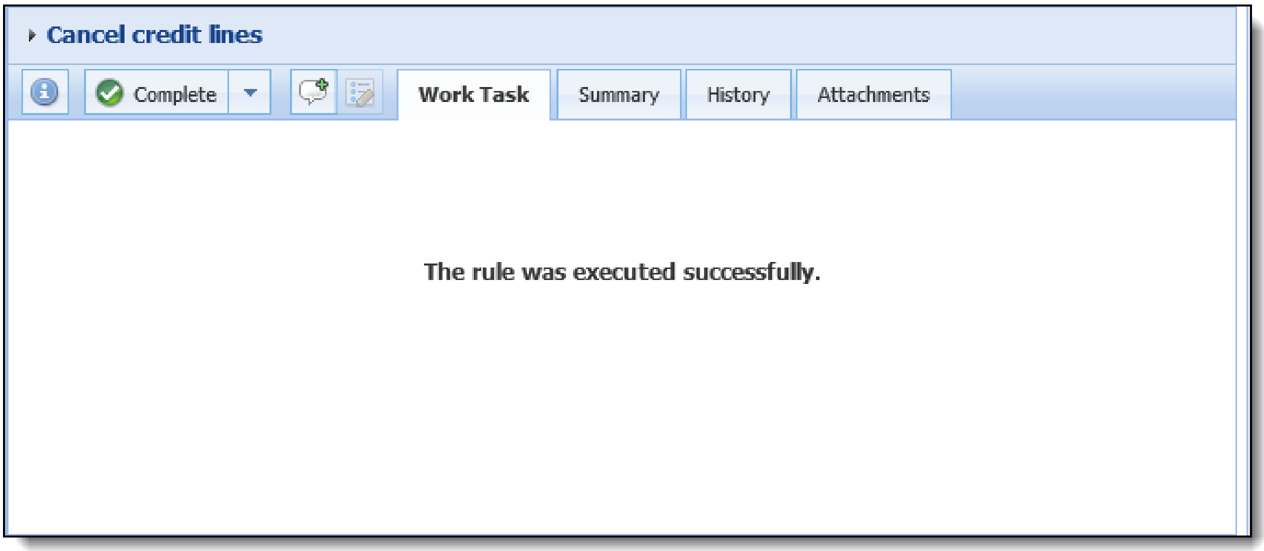
The Screen task type allows users to view and edit a screen. The Work Task tab displays the Screen that is selected for the task. From within the work task details, users can save, refresh, and print the screen while working on it. Once the task is completed, the screen saves automatically.



Execute Rules

Execute Rules task type is an automated task that uses business rules to analyze data and start additional tasks automatically. The work task tab for an Execute rule task displays a message to alert the user that the task was executed successfully.

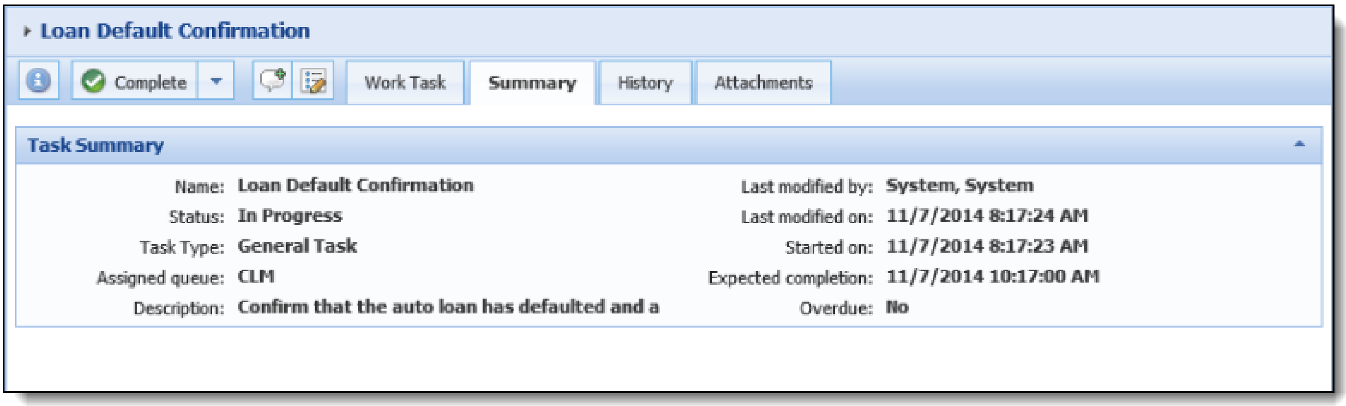
> If the task was not executed successfully, users manually select the result by completing the task.



> More information about why the rule(s) failed can be found in the event log. Access the event log by selecting Events from the Help drop-down in the Ribbon Bar.

Summary

The summary tab provides an overview of the task. Depending on the task status, the information displayed varies.



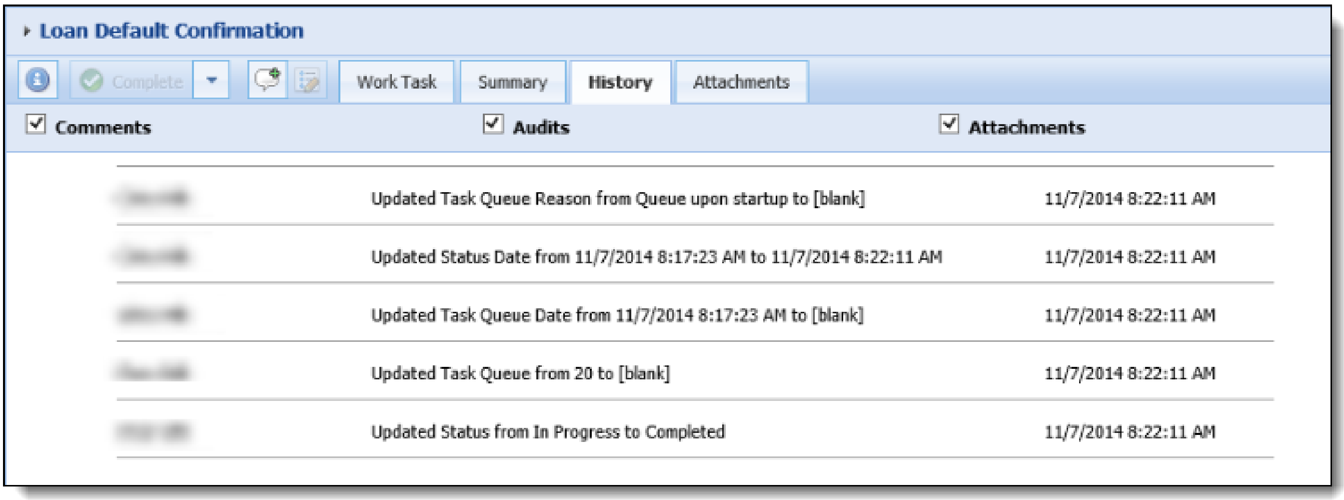
<table>
<tr><th>Status Type</th><th>Details</th></tr>
<tr><td>Active</td><td>A task that has a status of In Progress or Waiting to Start is considered active. The summary details of an active task are:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>Displays the name of the task.</td></tr>
<tr><td>Status</td><td>Displays the current status of the task.</td></tr>
<tr><td>Task Type</td><td>Displays the task type.</td></tr>
<tr><td>Assigned Queue</td><td>Displays the name of the queue in which the task is currently located.</td></tr>
<tr><td>Description</td><td>Displays the description of the task provided by an administrator.</td></tr>
<tr><td>Last modified by</td><td>Displays the name of the most recent user to make modifications to the task.</td></tr>
<tr><td>Last modified on</td><td>Displays the date and time the most recent modifications were made.</td></tr>
<tr><td>Started on</td><td>Displays the start date and time of the task.</td></tr>
<tr><td>Expected completion</td><td>Displays the date and time the task is expected to be completed.</td></tr>
<tr><td>Overdue</td><td>Displays a message based on the expected completion date.
If the expected completion date has not passed, No is displayed.
If the expected completion date has passed, Yes is displayed.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr>
<td>Closed</td>
<td>A task that has a status of Completed or Canceled is considered closed. The summary details of a closed task are:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>Displays the name of the task.</td></tr>
<tr><td>Status</td><td>Displays the current status of the task.</td></tr>
<tr><td>Task Type</td><td>Displays the task type.</td></tr>
<tr><td>Description</td><td>Displays the description of the task provided by an administrator.</td></tr>
<tr><td>Completed by</td><td>If applicable, displays the name of the user that completed the task. This field only displays if the task was closed due to completion.</td></tr>
<tr><td>Completed on</td><td>If applicable, displays the date and time the task was completed. This field only displays if the task was closed due to completion.</td></tr>
<tr><td>Canceled by</td><td>If applicable, displays the name of the user that canceled the task. This field only displays if the task was canceled.</td></tr>
<tr><td>Canceled on</td><td>If applicable, displays the date and time the task was canceled. This field only displays if the task was canceled.</td></tr>
<tr><td>Results</td><td>If the task was completed, displays the result(s) of the task.</td></tr>
</table>
</td>
</tr>
</table>

History

The history tab tracks the work done at the task level of a case. By default all history types are displayed; however, users can filter the history displayed by selecting and clearing check boxes next to the history types.

Comment History: Shows the history of all the comments associated to the task.
Audit History: Shows the history of all field changes made in the task.
Attachment History: Shows the history of any attachments associated to the task.



The columns displayed on the History screen are:

Column	Description
User	Displays the name of the user that performed the action.
Details	Displays a description of the action.

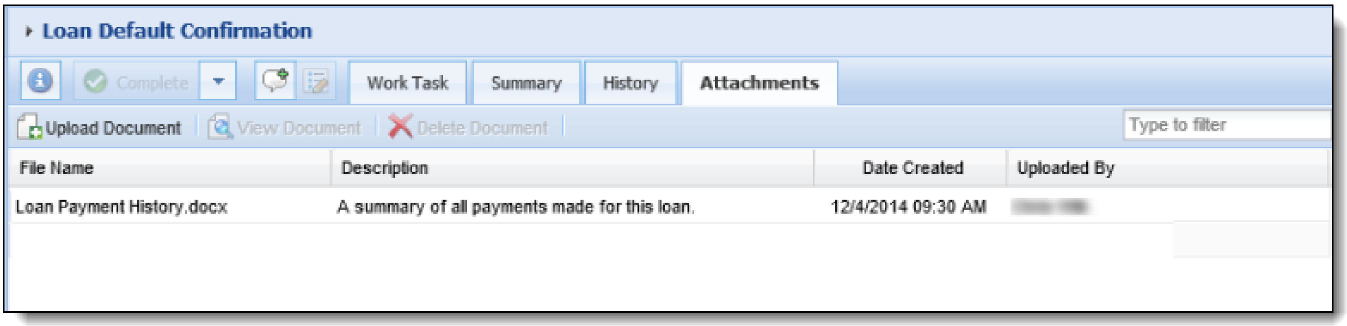
Date	Displays the date and time of the action.

Attachments

Attachments are used to provide supporting information to a task. Any document type such as .pdf, .docx, and .xlsx can be attached to the task. Users may attach a document for a number of reasons.

For example, while working a Loan Default Confirmation task in a Foreclosure Case Process, an institution may request users to attach a Loan Payment History directly to the task to display all payments made and the remaining balance of the defaulted loan.

> A task can have multiple attachments.



Details about the attachments are displayed on the Attachments screen:

Field	Description
File Name	Displays the name given to the file when it was uploaded.
Description	Displays details for the purpose of the attachment.
Date Created	Displays the date and time the upload was added to the task.
Uploaded By	Displays the name of the user that uploaded the attachment.

Creating a Case

There are two different ways to create a case on an account. Cases can be created by using the icon or by running the Create Case workflow step.

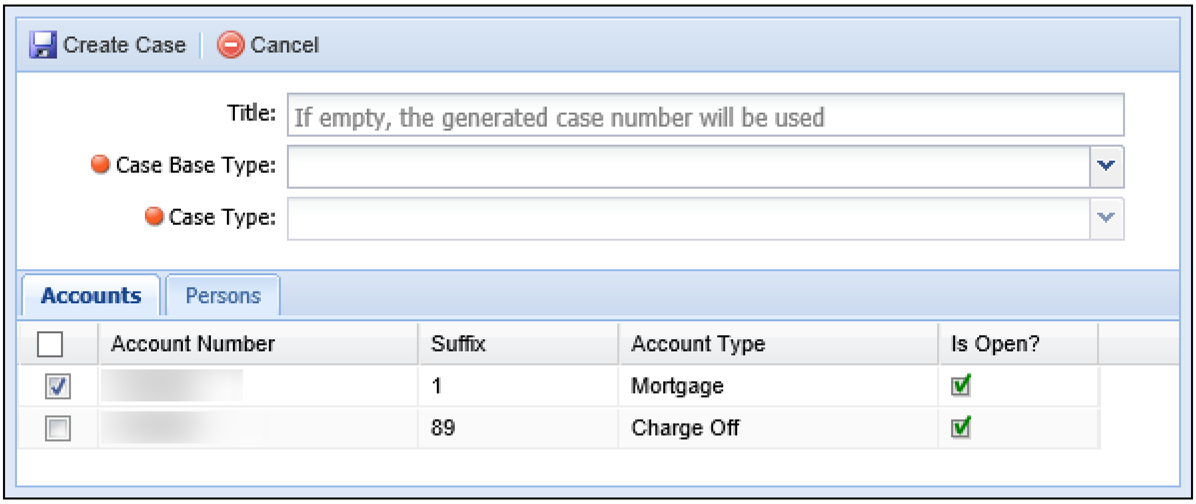
Creating a Case from the Workspace Toolbar

- Click .
- The Create Case window appears.
- Enter the Case Title using company defined standards.

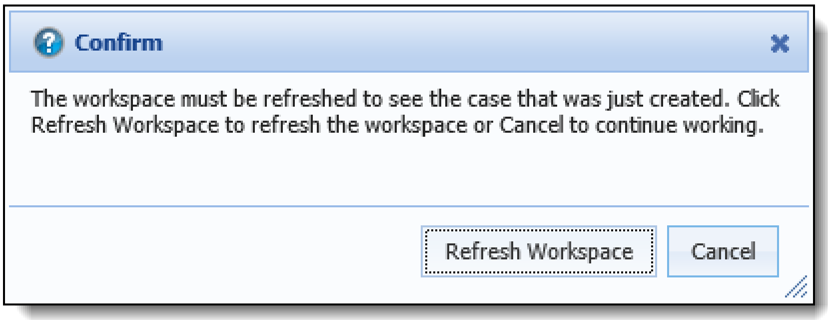
> If a Case Title is not provided, the system automatically populates the generated Case Number in the Case Title field.

- Select the Case Base Type from the drop-down. Case Base Types are pre-determined by the system administrator.
- Select the Case Type from the drop-down. Case Types in the drop-down are populated depending on the Case Base Type selected.
- The Accounts tab and Persons tab appears for all Case Base types selected, and depending on the Case Type

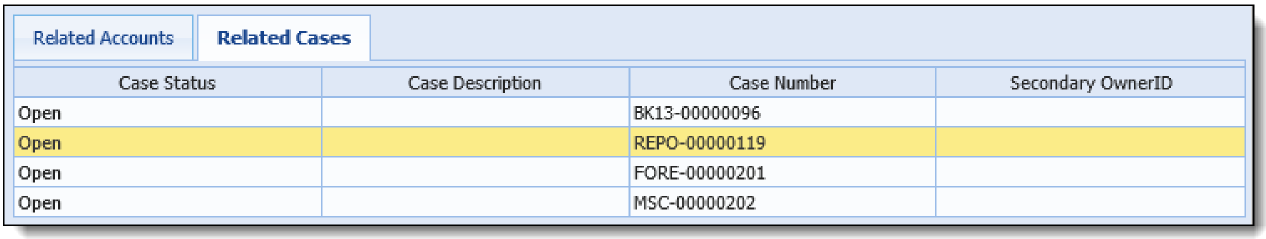
selected, a Collateral tab may display. On each tab, select the account(s), person(s) and collateral to relate to the case.



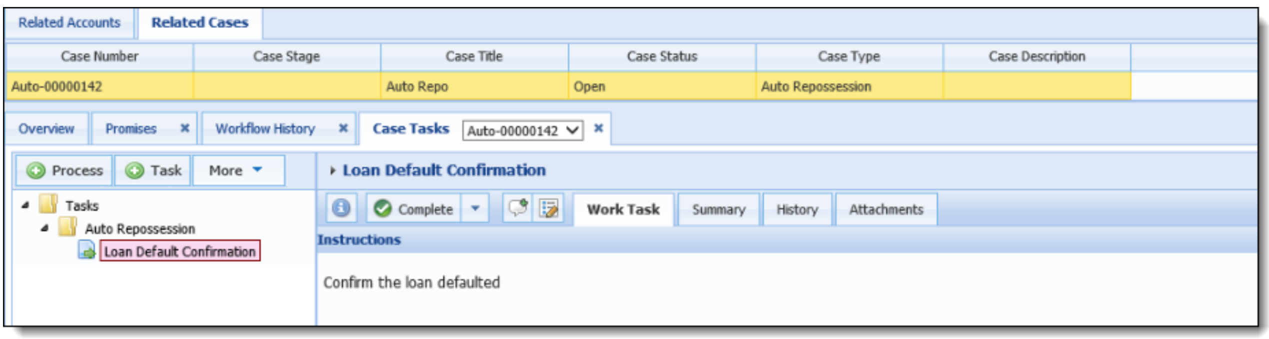
- When finished entering all of the necessary information, click **Create Case** to save and create the case.
- The Create Case window closes and a pop up message appears stating the workspace must be refreshed in order for the new case to display. Click **Refresh Workspace** to refresh the workspace.



- The new case then appears and is in context.



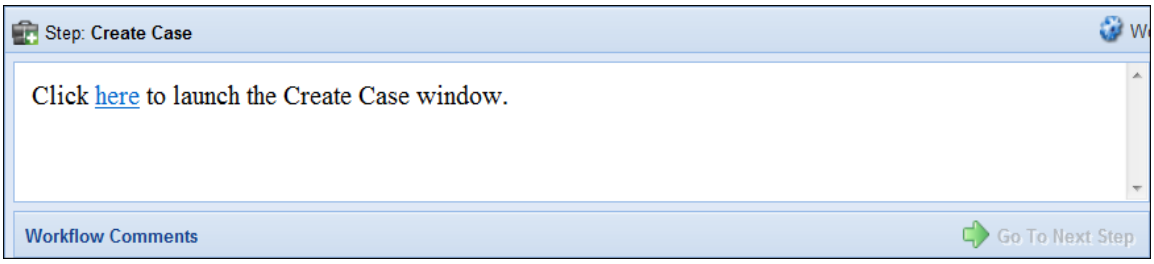
- The Case Tasks screen loads automatically so the case can be worked, provided the user has appropriate permissions to the screen.



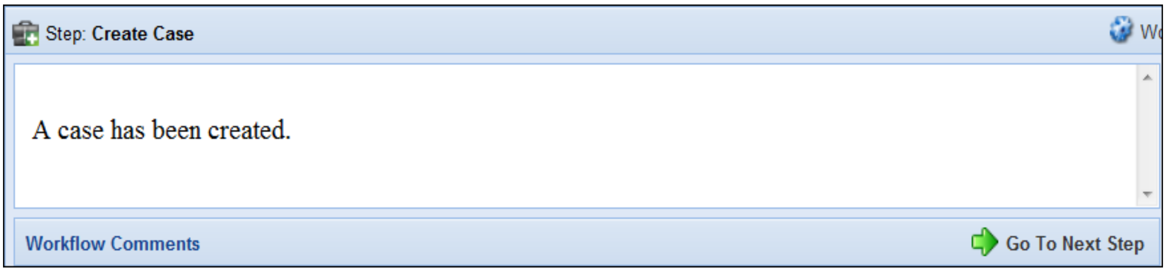
Creating a Case Workflow Step

Users can create cases by running the create case workflow step as a part of a workflow. The system administrator can configure the workflow step to be either automated or manual.

- **If set to automated**: When the workflow step executes, it completes automatically. No manual steps need to be performed. Refresh the workspace to see that the case was created.
- **If set to manual**: When the workflow step executes, a message appears that allows the user to manually create a new case from within the workflow step.



- Clicking the link opens the Create Case window. Follow the steps provided at the beginning of this section to create the case. When finished, a message appears in the workspace indicating the case has been created.



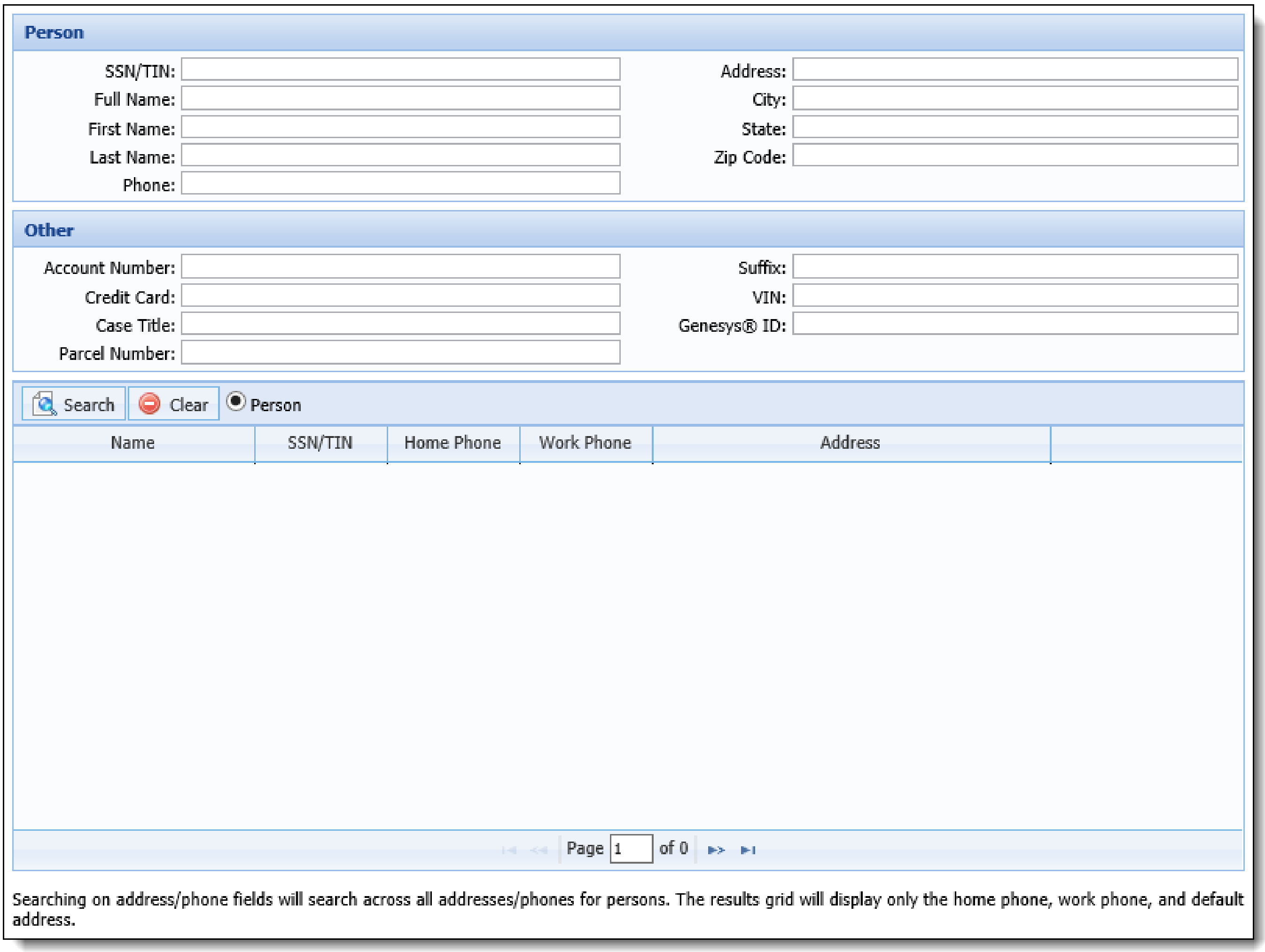
- After completing the workflow, refresh the workspace to see that the case was created. The case is in context in the Related Cases grid and the Case Task screen loads automatically.

> All associated collateral is linked to an account when using the automated Create Case workflow step from within an automated or manual workflow.

Adding Additional Persons and Accounts to Cases

Additional persons and accounts can be added to a case after it has been created. To add a person or account to a case, navigate to the Case type screen that contains the Related Person and Related Account panels and click Relate Person or Relate Account. The Basic Search window displays.

> A system administrator must configure a Case type screen to include the Related Persons panel and the Related Accounts panel, as well as the Relate Person, Relate Account, Remove Person, and Remove Account buttons.



Enter any person or account criteria to use in the search and click 

. Double-click on the desired result displayed within the Results grid to add the person/account to the case, automatically close the Basic Search window, and return to the workspace.

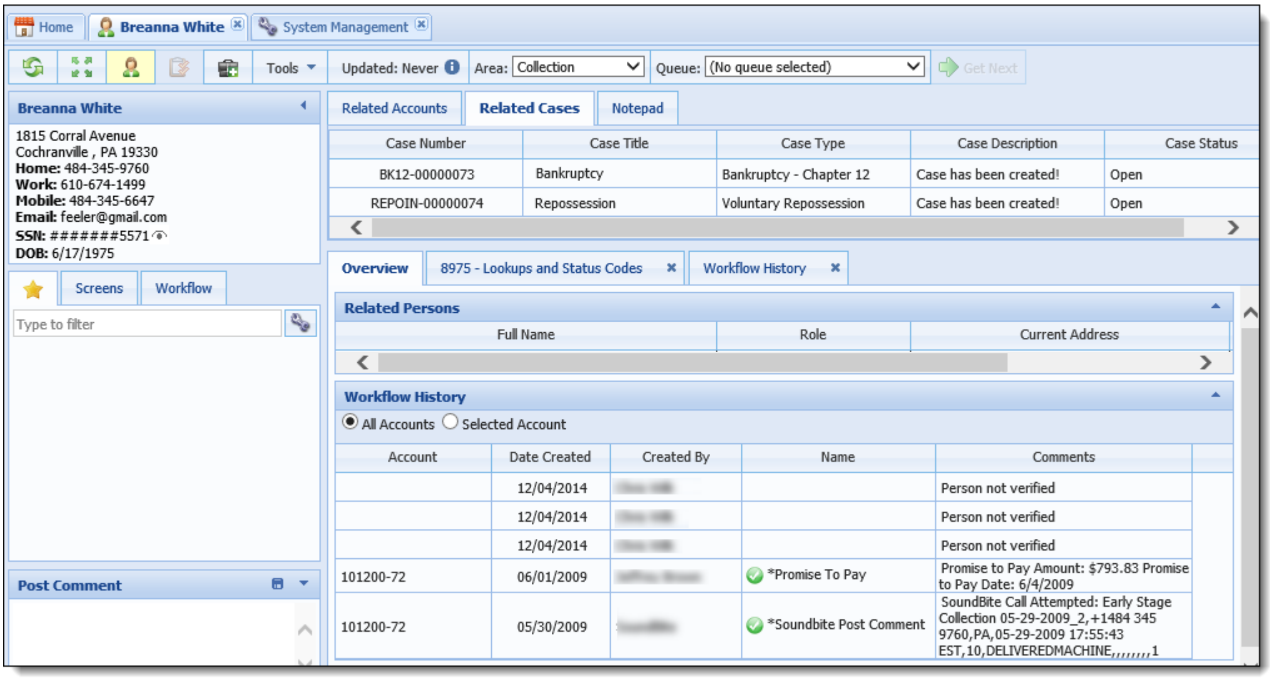
Opening a Case

Existing Cases can be accessed through a search or by selecting a case from the Related Cases panel in the workspace.

> Individual case tasks can be accessed through case queues. For more information about case queues, please see the Case Queue topic in this guide.

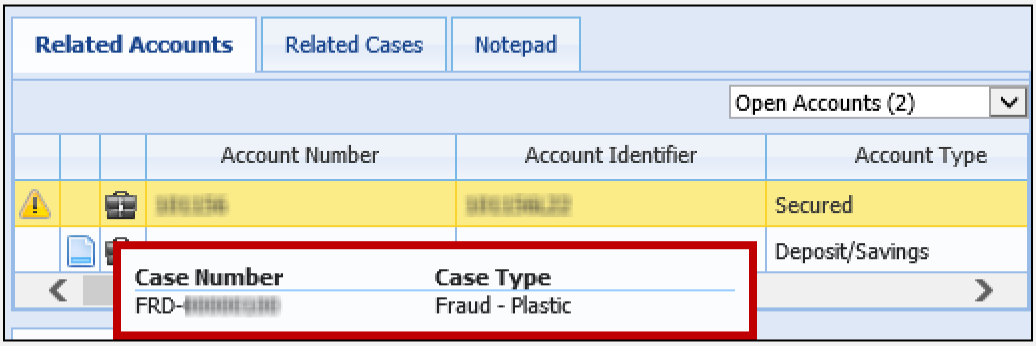
Opening a Case from the Workspace

- If configured to display in the workspace, click the Related Cases panel. All cases associated with the person display.



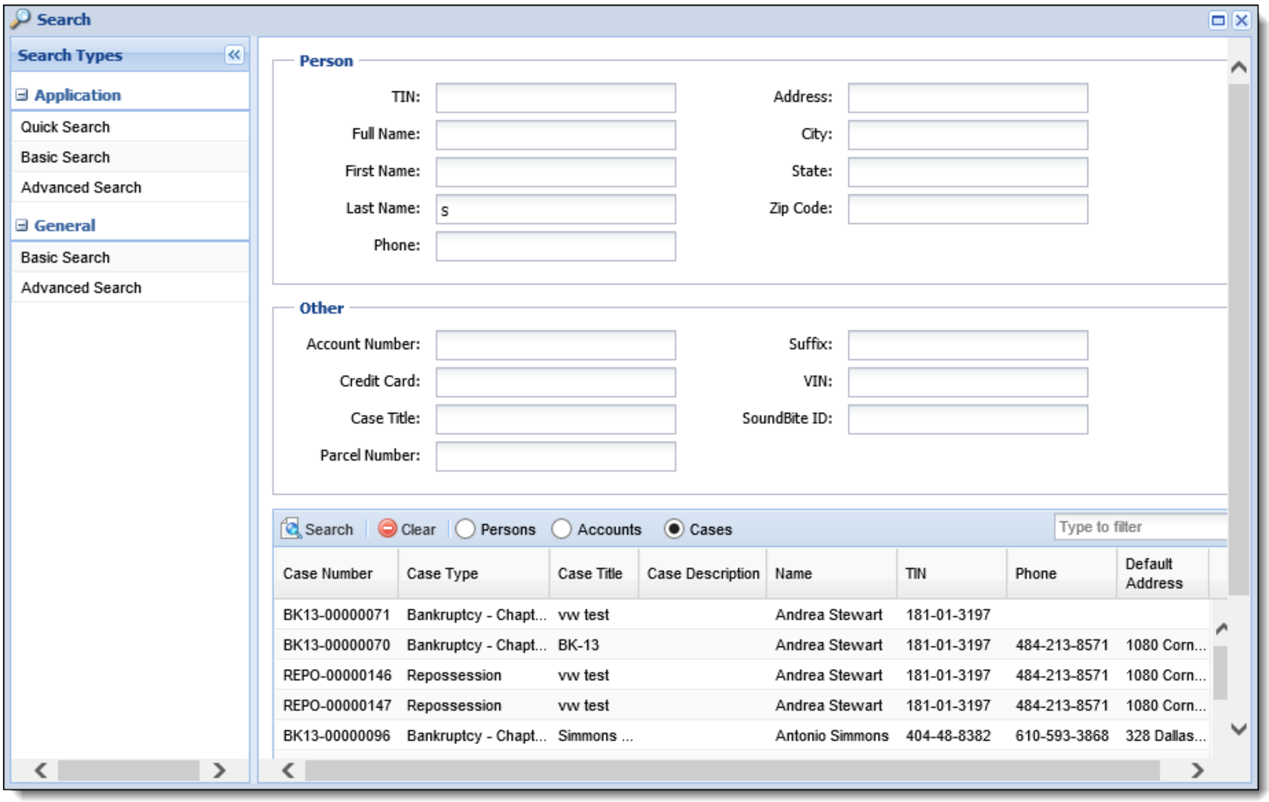
- Select a case from the grid. The case is now in context and can be worked via screens, workflows, and tools configured for the specific case type.

> System Administrators can configure a to display in a column within the Related Accounts panel 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.

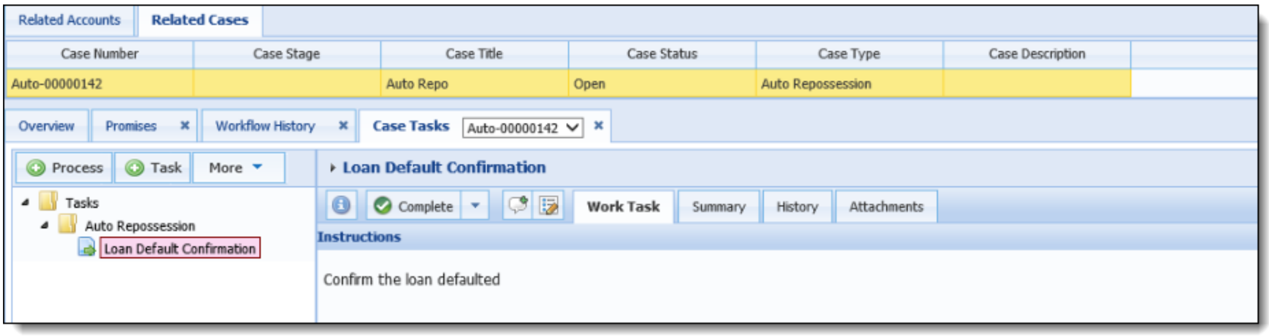


Opening a Case from a Search

- From the search window, enter any criteria to search for and select the **Cases** radio button. Click the **Search** button and the cases appear in the results grid.



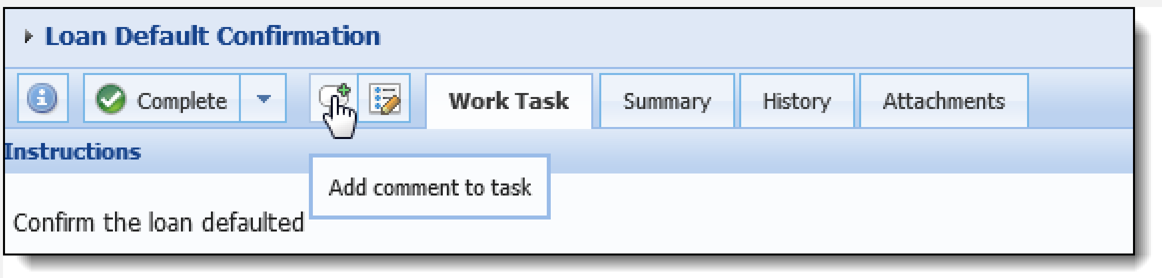
- Double-click a case in the results grid to open the workspace for which the case is associated. The case is in context (highlighted yellow) in the Related Cases panel and is displayed in the Overview section, ready to be worked, when the workspace is loaded.



Working a Case

A case is worked by resolving all the tasks in the Task Navigation Panel. While working tasks, users can perform actions such as changing the task status, posting comments, and assigning tasks to a case queue.

While hovering over toolbar actions, tool tips are displayed to indicate the purpose of the buttons.



Managing the Task Navigation Panel

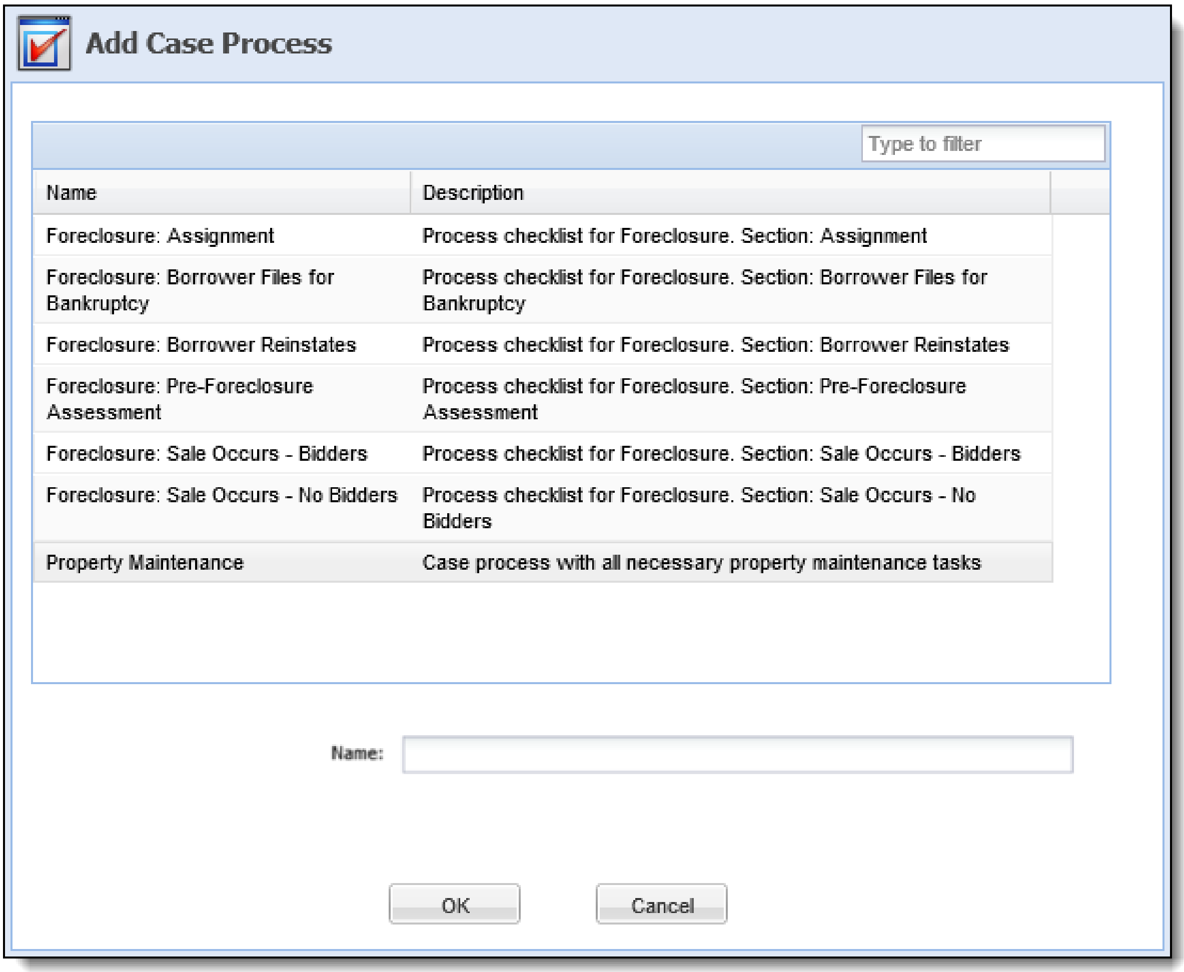
While working a case users may need to add additional processes and tasks or cancel existing tasks. These actions are performed within the task navigation panel.

Adding Case Processes

Users may need to add additional case processes that are not always required to complete a case, but sometimes are necessary. For example, in a foreclosure case a maintenance case process contains such tasks as landscaping and pest control and could be added to the case every month that the property is owned by an institution.

- To add a case process, click 

.
- An Add Case Process box appears. Select the case process that is to be added from the list of available processes.



> Available case processes are determined by an administrator when configuring case types.

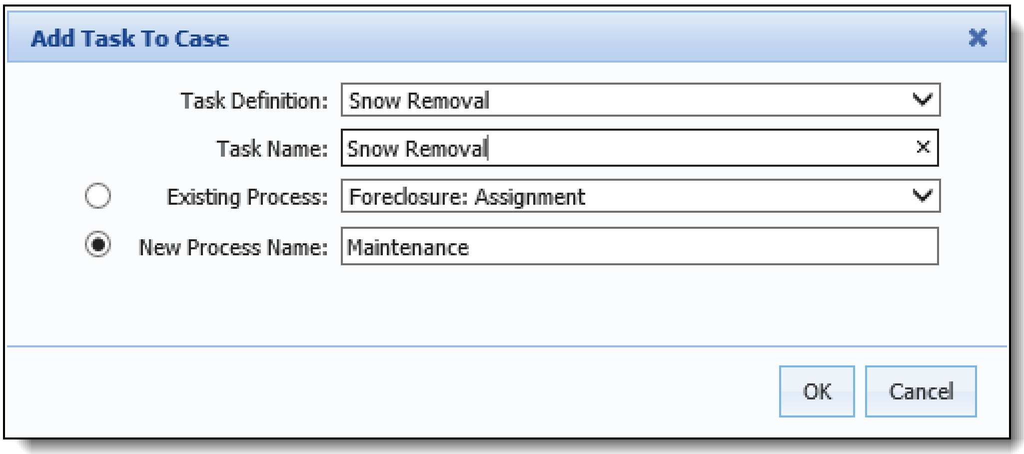
- Once a case process is selected, the name populates at the bottom of the screen. This is an editable field.
- Click **OK** to add the desired case process. Click **Cancel** to return to the case without adding an additional process.

> Adding a Case Process to a Closed or Cancelled case results in the case returning to an Open status. When attempting to add a case process to a Closed or Cancelled case, a message informs users "Adding this task process will reopen the case.".

Adding Case Tasks

Users may need to add individual case tasks that are not always required to complete a case, but sometimes are necessary. For example, in a foreclosure case, if a property in an institution's possession requires snow removal during the winter, a task can be added to the foreclosure case.

- To add a case task, click 
.
- An Add Task To Case box appears. Select the case task that is to be added from the Task Definition drop-down.



> Available case tasks are determined by an administrator when configuring case types.

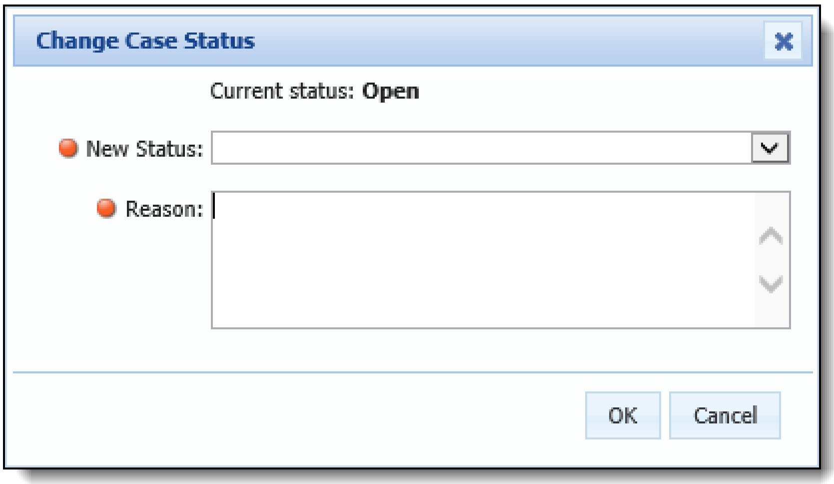
- Once a case task is selected, provide a name for the task.
- Select the radio button to add the new task to an existing case process and select the desired case process from the drop-down or select the radio button to create a new process and name the process.
- Click **OK** to add the desired case process. Click **Cancel** to return to the case without adding an additional process.

> Adding a Task to a Closed or Cancelled case results in the case returning to an Open status. When attempting to add a task to a Closed or Cancelled case, a message informs users "Adding this task will reopen the case."

Change Status

Users have the ability to change the status of cases from the task navigation panel.

- In the task navigation panel, click More, and select **Change Status**.
- Complete the New Status and Reason fields.



- Click **OK.**
- A confirmation message appears.
- Click **Yes** to change the status of the case. Click **No** to return to the case screen without changing the status of the case.

> If the new status is Canceled or Closed, all open tasks on the case are canceled.

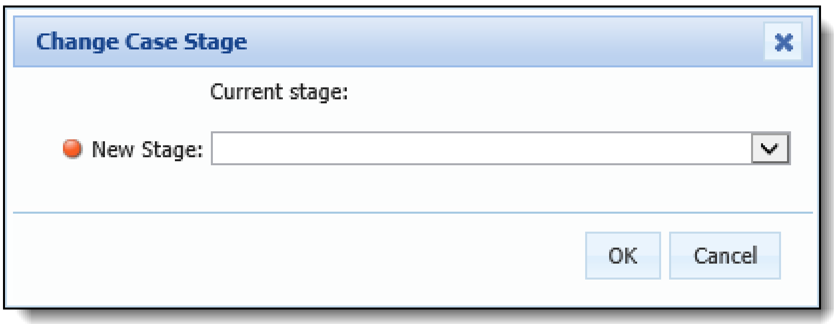
> The date a case was closed, or the date the status was changed for a case can be viewed in the workspace if the Case > Closed Date, and/or or Case > Current Status Date fields are configured to appear in a Case panel, or Related Cases panel on a Case or Person screen by the system administrator. These fields can also be configured to appear in a report or view.

Change Stage

Users have the ability to change a case's stage from the task navigation panel.

- In the task navigation panel, click More, and select **Change Stage**.
- Complete the New Stage field.

> The New Stage field does not show the current stage as an option.



- Click **OK.**
- A confirmation message appears.
- Click **Yes** to change the stage of the case. Click **No** to return to the case screen without changing the stage of the case.

Canceling Tasks

Users have the ability to cancel an individual task or all open tasks for an entire process from the task navigation panel. This functionality may be used when a user accidentally adds the wrong case process.

- In the task navigation panel, select the case process or case task that is to be canceled, click More, and select **Cancel Task**.

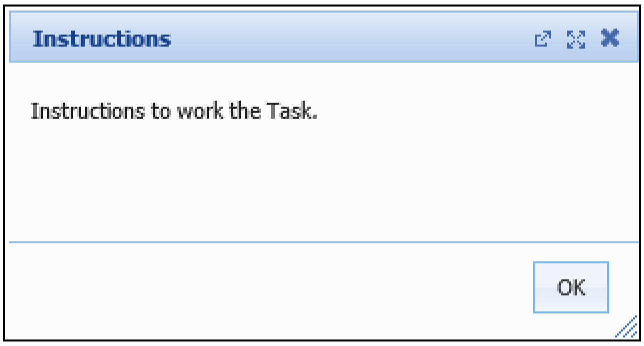
> If a user clicks Cancel, without selecting a process or task, an error message informs the user that a task or process must be selected prior to cancelling a task.

- A confirmation message appears.
- Click **Yes, Cancel Task** to cancel the task(s). Click **Close** to return to the case screen without canceling the task.

Viewing Task Instructions

Administrators provide instructions for users to reference on how to work a task to completion.

- If instructions have been provided for a task, clicking displays an instructions pop-up box. If an administrator has not provided instructions for a task the button is disabled.



> The instructions screen can be expanded to fill the case screen by clicking .
>
> Users can display the instruction screen in a new window by clicking .

- To close the Instructions screen click in the upper right corner, or click **OK**.

Changing a Task Status

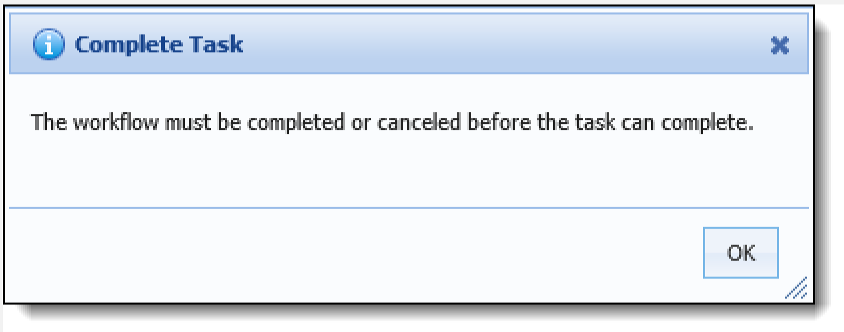
In the task toolbar, users can close a task by changing the status of a task within the Status drop-down.

The status drop-down contains three options: Complete, Cancel, and Undo. If a status is not available, the option is disabled. For example, if a task has not been canceled or completed, the status change cannot be undone; therefore, the Undo option is disabled.

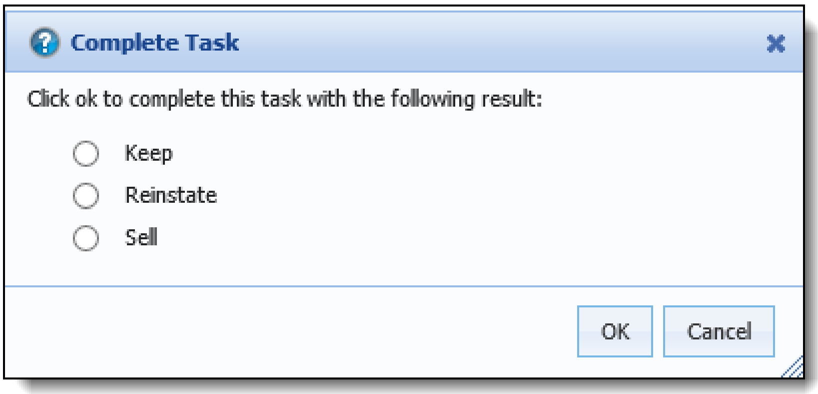
Complete

Completing a task can only be performed if the task is active and the work is completed. By default, the Complete option is the displayed selection from the Status drop-down.

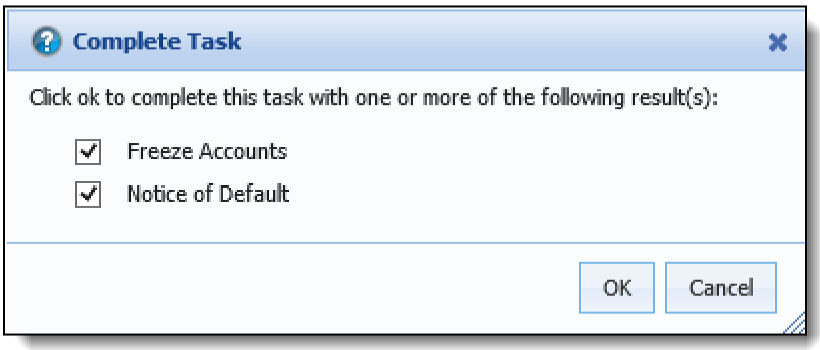
- To complete a task select Complete from the status drop-down

> If a user attempts to complete a workflow task that has not been worked, a message appears telling the user what must be done in order to complete the task.
>
> 
>

- A message box appears containing one of the following scenarios:
  - If the task can only be completed with no defined results to select, the only option is to complete or cancel the status change.
  - If a task can have only one result, select the radio button next to the desired result. For example, after a vehicle has been seized in a Repossession case an institution can keep the vehicle as payment, reinstate an account holder's loan, or sell the vehicle. Each of these results provides different tasks to be accomplished.



  - If multiple results can be chosen, select the check box next to the desired results. For example, when confirming a loan has defaulted, a user can selected to freeze the account holder's accounts, provide a notice of default, or do both.



- A confirmation message appears. Click **OK** to complete the task. Click **Cancel** to return to the task without completing it.

This confirmation message is bypassed, in certain scenarios:

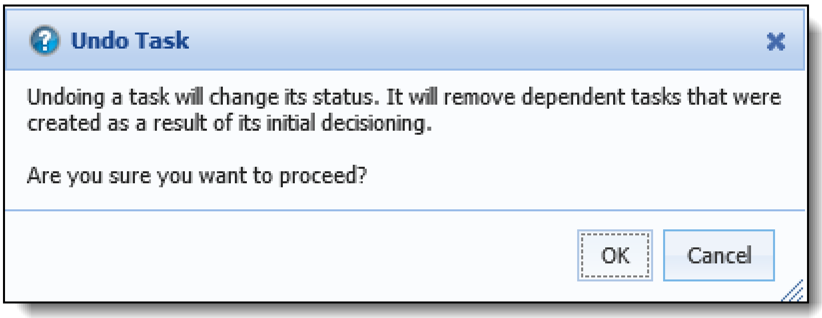
Scenario	Bypass Confirmation Dialog?
The task does not have defined results	Yes
The task has one defined result	Yes
The task has more than one defined result	No. The user must select the result

- After the task is completed, additional tasks populate in the task navigation panel if necessary.

Undo

Undoing a task provides users the ability to undo results of a closed task and work the task again to provide different results.

- If a task has a closed status, selecting **Undo Task** allows a user to undo the task and sets the task status to In Progress.
- A confirmation message appears.

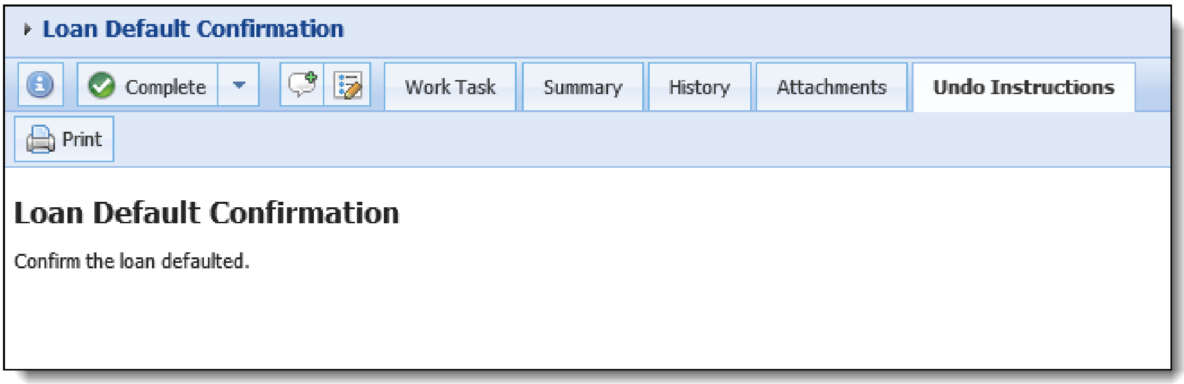


Click **OK** to undo the task. Click **Cancel** to return to the task without undoing the current results.

When a task is undone, all dependent task are also undone and set to Not Started. This happens because the new results of the undone task may produce different tasks that need to be completed.

- Once a task is undone, a new tab displays in the task called Undo Instructions.

The undo instructions provide the user details on how to proceed.



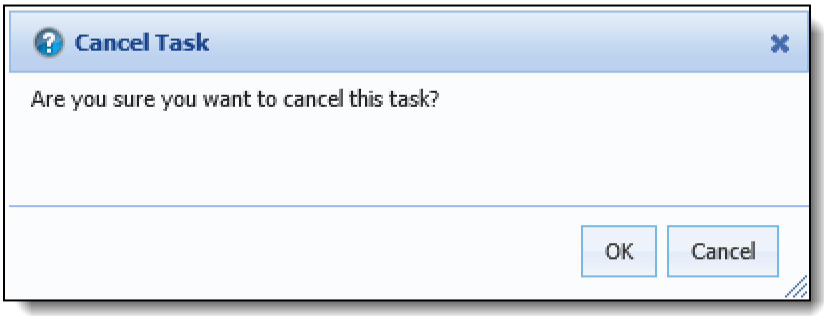
Once a user exits the task, the undo instructions tab is no longer available. It is recommended that the undo instructions are printed.

> ⚠ If a task is undone after dependent tasks have been closed, the undo instructions for all the tasks are displayed.

Cancel

Canceling a task can only be performed if the task is active. If a task is not active, canceling a task is disabled. This updates the status of all dependent tasks to Will Not Start.

- To cancel a task, select **Cancel Task** from the drop-down.
- A confirmation message appears

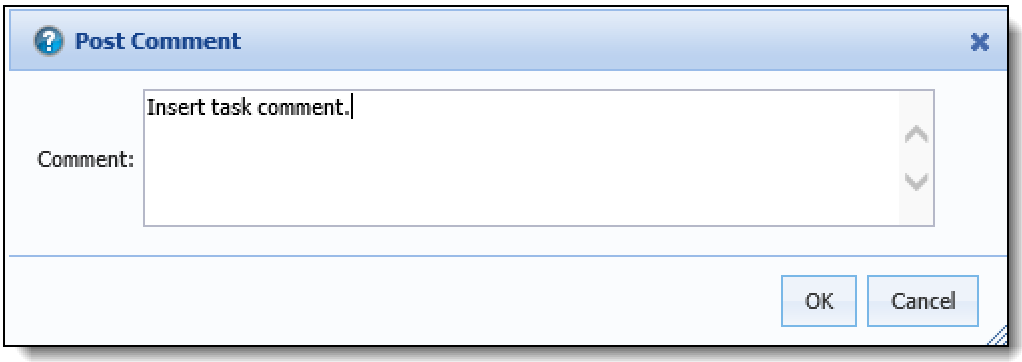


- Click **OK** to cancel the task. Click **Cancel** to return to the task without canceling it.

Posting a Comment

The Post Comment button in the task toolbar allows users to post a comment directly to a case task.

- To post a comment, click .
- A Post Comment box appears.



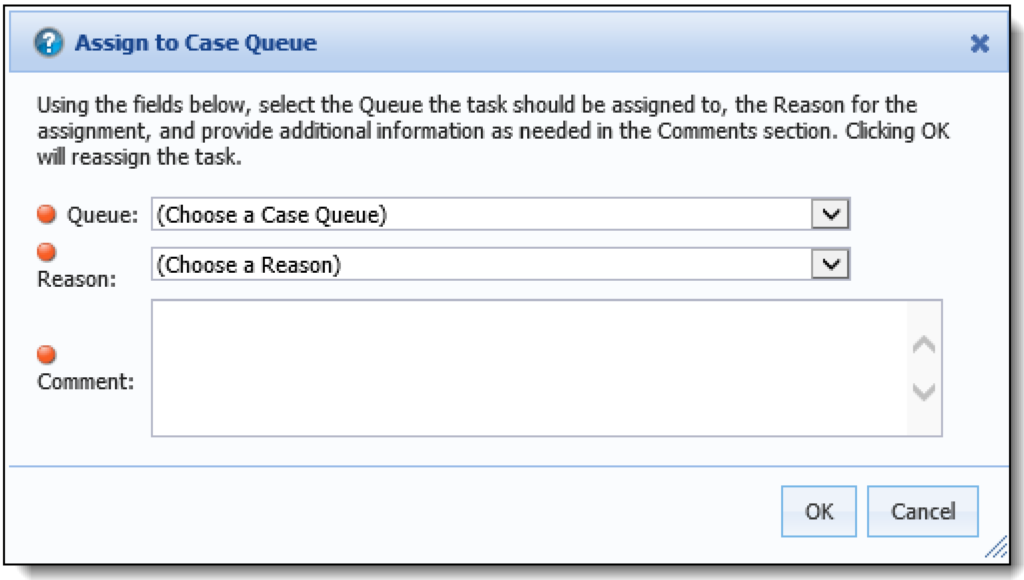
- Insert the comment in the textbox.
- Click **OK** to save the comment and close the Post Comment box. Click **Cancel** to return to the task without posting a comment.
- All comments posted to a task can be viewed in the History details tab.

> All comments posted to a task are also posted to the Person associated to the case and can be viewed in Workflow History in the workspace.

Assigning a Task to a Queue

Users can assign tasks to Case Queues for reasons such as to escalate a concern or to turn the task over to another department to address an issue with data captured earlier in the case.

- Assign a task to a Case Queue by clicking .
- An Assign to Case Queue box appears containing three required fields.



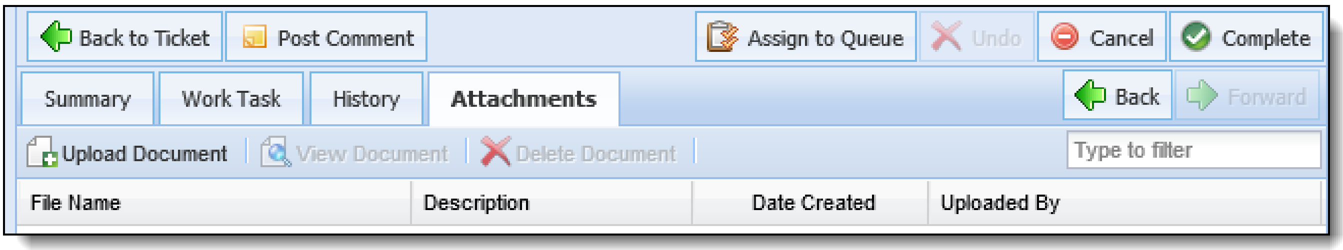
- Select the Queue from the Queue drop-down.
- Select the reason for Queuing the task from the reason drop-down.

> Inactive tasks are not visible to the user. These tasks automatically populate in a ticket when a closed task returns results that activate these tasks.

- Provide additional information about queuing the task.
- Click **OK** to Queue the task. Click **Cancel** to return to the task without queuing it.

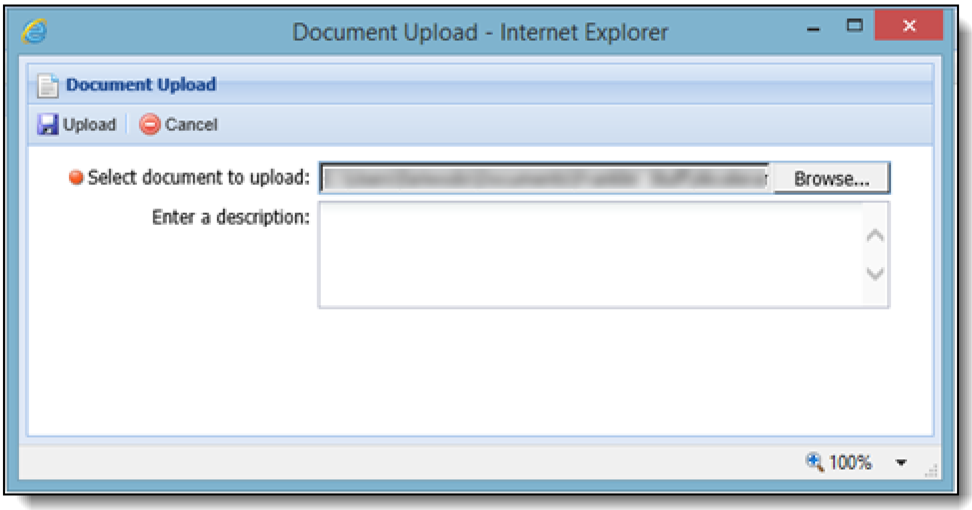
Managing Task Attachments

Case task documents can be uploaded, viewed, or deleted from the Attachments tab within a task.



Upload Document

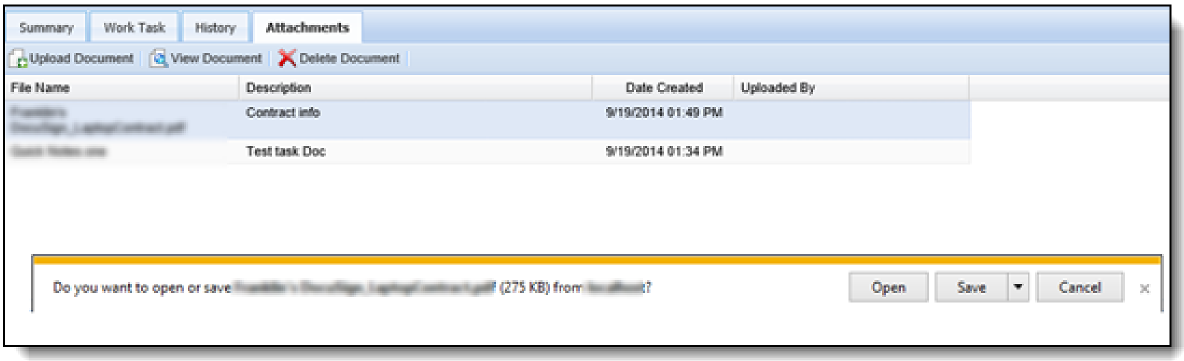
- Click  to display the document upload screen.



- Click **Browse** to locate the desired file to upload.
- Select a file and click **Open**. The document path is now populated in the Document Upload screen.
- Enter a description to provide details to users about the upload. The description is displayed in the Attachments tab.
- Click **Upload** to upload the document to the task and return to the Attachments tab. Click **Cancel** to return to the Attachments tab without uploading the document.

View Document:

- To view an attachment, select a document in the list and click .
- An Internet Explorer message appears asking to **Open**, **Save**, or **Cancel** viewing the document.



- **Open**: Selecting Open opens the file based on the file type. For example, a word document attempts to open in Microsoft Word, while a PDF file opens in a Picture Viewer.
- **Save**: Selecting Save allows the document to be saved to the user's local files.
- **Cancel**: Selecting Cancel cancels the attempt to view the document and returns the user to the Attachments tab.

Delete Document:

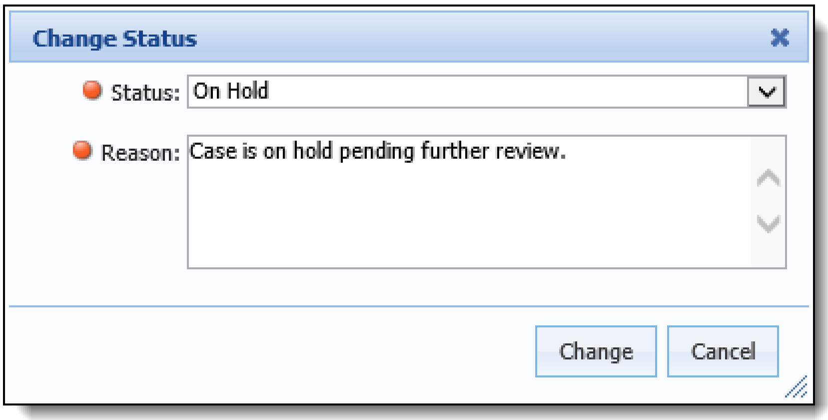
- To delete an attached document from a task, select the document and click .
- A confirmation message appears.
- Click **Yes** to delete the document. Click **No** to return to the Attachments tab without deleting the document.

Changing Case Status and Stage

While working a case, it is important to maintain the status and stage of the case. The case status can be updated by opening a case screen that has been configured to include the case status button.

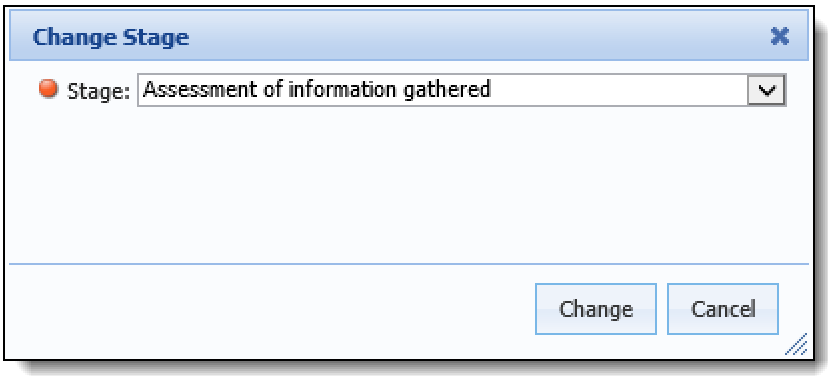
> To allow users to maintain the status and stage of the case, administrators must configure a case screen to include the status and stage button.

Clicking the case status button opens a Change Status pop-up. Select the status from the drop-down and supply a reason for the change in status. When finished, click **Change**.



Optionally, financial institutions may make use of the case stage that defines what stage or phase the case is in. For example, a repossession case in "Open" status has a stage of "Auction." The case stage provides better visibility to the progress of the case. The case stage can be updated by opening a screen that has been configured to include the case stage button.

Clicking the case stage button opens a Change Stage pop-up. Select the stage from the drop-down and click **Change**.



If no processes or tasks exist on a Case, the system prompts users to close the case, when the task tree refreshes.

The task tree loads in the following scenarios:

- Case status changes
- Completing a task
- Canceling a task

Storing Case Data

A number of fields are included in the database for value capture when creating, working, and linking cases. This replaces the need to create custom fields or rename User-Defined Fields and manually populating them. Business Rule functionality can be employed to set the values of these new fields automatically. The following fields have been added to capture data values and can be found in the field list when creating Screens and Reports:

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

In addition to the above fields the following fields are available in the Field List to capture the value of the Closed Date and/or Current Status Date for a case in rules, reports, and views. These fields can also be added as read-only fields to a Case panel, or Related Cases panel on a Case or Person screen:

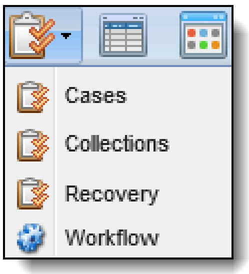
- Case > Closed Date
- Case > Current Status Date

Queues

Queues help organize accounts and cases within the system. System administrators define criteria for queues so similar accounts can be worked together by one user or a group of users. Queues serve as a user's list of work and are automatically updated each day, providing an efficient way to get work done in Temenos Infinity.

The Queues drop-down within the Work section of the ribbon provides access to the different types of queues within the Framework. From this drop-down, users can access and work queues to which they assigned.

The queue type(s) available in this drop-drown are determined by the institution's active module(s). For example, if the Loan Origination module is not active, Application queues do not appear in this drop-down.



The Temenos queue types are as follows:

Queue Type	Description
Collections	Collection Queues are made up of delinquency and recovery queues.
Cases	Case Queues are made up of tasks related to cases.
Workflow	Workflow Queues serve as a holding area for workflows that require management approval or are being routed from one department to another.

The ability to view and work queues is at the discretion of the System Administrator.

Service Queues

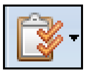
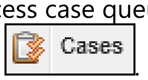
Case queues promote the organization and management of case and case process tasks. Tasks that have been scheduled to be worked are housed in case queues until they have been canceled or completed.

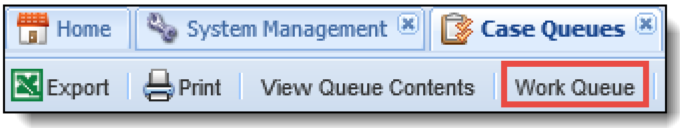
Once a task is started, it is placed in a default queue that is assigned by the system administrator. There are two ways a task can change queues:

1. An administrator can assign an escalation schedule to a task that moves the task to other queues at predetermined times or durations.
2. An administrator can manually change the queue a task is in from the task toolbar while they are

> For more information about Escalation, please see the Escalation section of the administrative guide.

Accessing Case Queues

- To access case queues, click the  drop-down in the Work section of the Ribbon.
- Select 
.
- The Case Queues window appears containing a list of all the Case Queues for which the user has permissions.
- Highlight a queue within the list, and click **Work Queue** to open a new tab containing the workspace and the first case that needs to be worked from that queue.



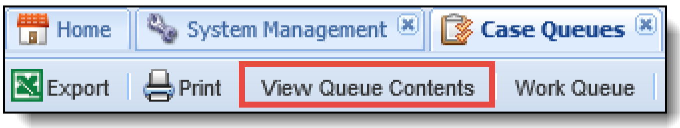
> Tasks in a case queue are prioritized and presented to the user based on the due date, then by importance.

While working a queue, users can get the next task in a queue by clicking 

in the workspace toolbar.

Viewing a Cases Queue's Contents

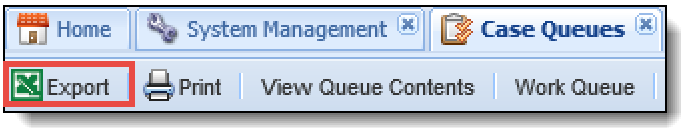
To view the queue's contents prior to working the queue, double-click a queue or select a queue to highlight it and click **View Queue Contents** to view its contents in a new tab.



A list of tasks in the queue displays. Double-click a task or click to highlight the task and click **Open Case** to view the task in the workspace.

Exporting the Case Queue List

From the case queue page, export the queue list to Excel by clicking to highlight the queue and clicking the **Export** option.



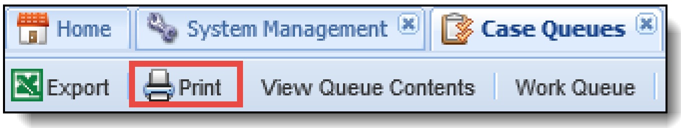
Excel asks the user to verify that the file is both uncorrupted and from a trusted source before allowing a user to open the file.

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

Name	Description	Tasks
Default Task Queue	Default Task Queue	37
KM- Legal	My task queue	1
MCE BK	Regression Testing	56

Printing the Case Queue List

To print a queue listing, click to highlight the queue and click **Print**.



Assigning Tasks to Cases Queues

Tasks are automatically assigned to a queue when they are started, this default queue is set by the system administrator while the task is being created. Tasks can also be assigned to queues manually by users. When working a case, assign a task to a queue by using in the task toolbar.

For example, if more information is needed in order to complete a task, users can assign tasks to queues manually for another department or co-worker to work. To complete a "Send to Auction" task, the auction date is specified by another user during a Notice of Delinquency task earlier in a Foreclosure case process. If the date was not assigned, the back office processing department may assign the Send to Auction task to the queue for Notice of Delinquency tasks in order to obtain the correct date.

If a task has been assigned an escalation schedule, tasks automatically change queues at predetermined times.

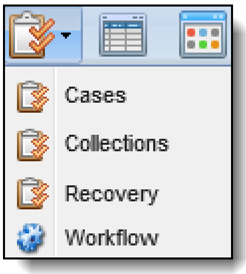
For more information on working a task, see the Case Task topic in this guide.

Workflow Queues

Workflow Queues contain individual workflow steps that can be assigned to a queue to be worked by another person. For example, a "Send Documents" workflow step may need to be handled by the mailroom. As the workflow is worked, the user completes the steps and is presented with a "Send Documents" step. The user is notified that the workflow step is assigned to another user. Once the mailroom accesses the workflow queue and performs the Send Documents step, the user performing the workflow is able to complete the remaining workflow steps on the account.

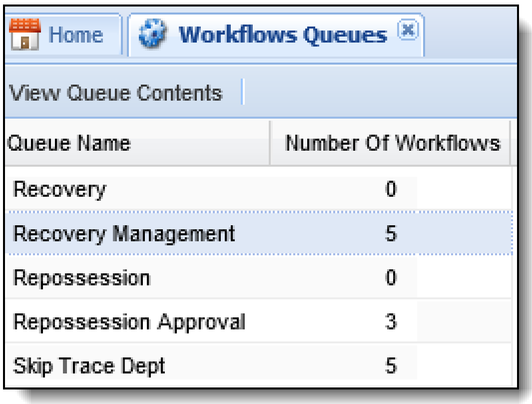
To Access a Workflow Queue

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



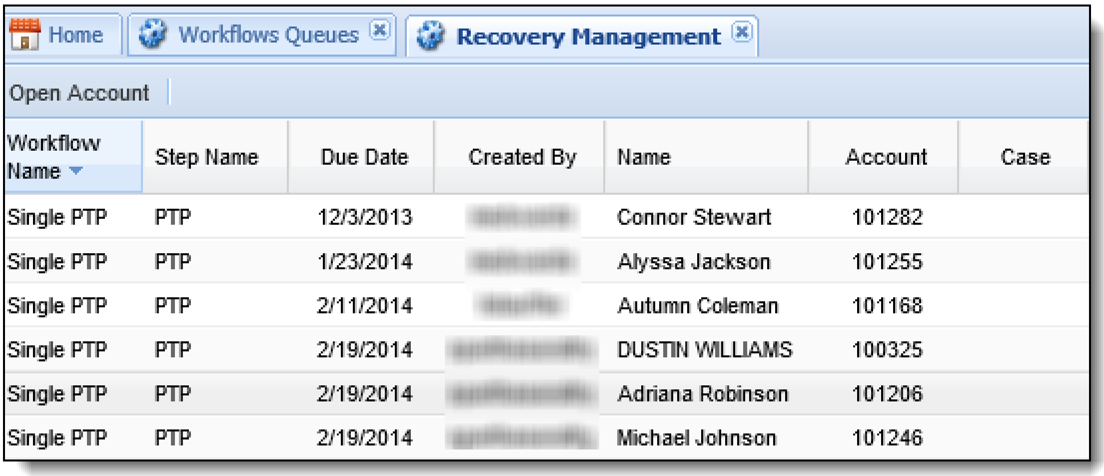
- The Workflow Queues tab appears containing a list of available Workflow Queues.

> Only workflows that have an Active status are displayed within the list.



Queue Name	Number Of Workflows
Recovery	0
Recovery Management	5
Repossession	0
Repossession Approval	3
Skip Trace Dept	5

- From this screen users can view contents of a queue by highlighting a queue and clicking **View Queue Contents.**
- A new tab opens displaying a list of workflows to be worked.



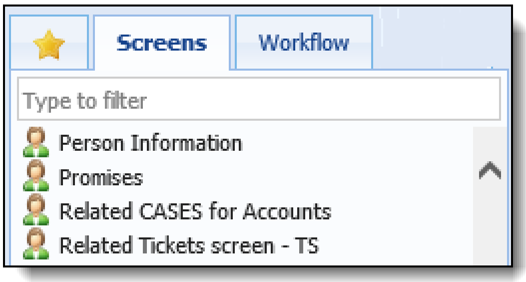
Workflow Name	Step Name	Due Date	Created By	Name	Account	Case
Single PTP	PTP	12/3/2013	[illegible]	Connor Stewart	101282	
Single PTP	PTP	1/23/2014	[illegible]	Alyssa Jackson	101255	
Single PTP	PTP	2/11/2014	[illegible]	Autumn Coleman	101168	
Single PTP	PTP	2/19/2014	[illegible]	DUSTIN WILLIAMS	100325	
Single PTP	PTP	2/19/2014	[illegible]	Adriana Robinson	101206	
Single PTP	PTP	2/19/2014	[illegible]	Michael Johnson	101246	

- Double-clicking an item from the list or highlighting and clicking **Open Account** opens the account in the workspace. By default, the workflow step to be worked is opened. When the workflow step is completed, it is removed from the list.

Screens

This topic contains general information about Account Servicing screens in Temenos Infinity. These screen types include person, account, and case screens. Screens allow users to create, edit, and view account, case, and account holder data. They are accessed from the Screens tab in the left navigation panel of the workspace.

> Ticket screens are not available in the screens tab.



The list of screens displayed varies based on the account or case in context, the user's security permissions, and the areas assigned to the screen. When configuring screens, the system administrator defines the account and case types for which the screen is available.

Screen Types

Person Screens

Person screens display information related to the person in context such as Contacts, Promises, and Workflow History. Person screens are identified in the Screens tab with a person icon.

> For more information on person screens, please see the Person System Screens topic in this guide.

Account Screens

Account screens display information related to the account in context such as Letter History, Payment History, and Documents. Account screens are identified in the Screens tab with a financial institution icon. For more information on account screens, please see the Account System Screens topic in this guide.

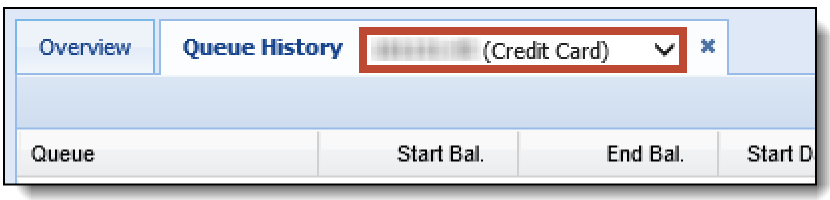
Case Screens

Case screens display information related to the case in context such as Case Tasks, or Bankruptcy or Repossession information. Case screens are identified in the Screens tab with a briefcase icon. For more information on case screens, please see the Case System Screens topic in this guide. Case screens are used in the Collections module.

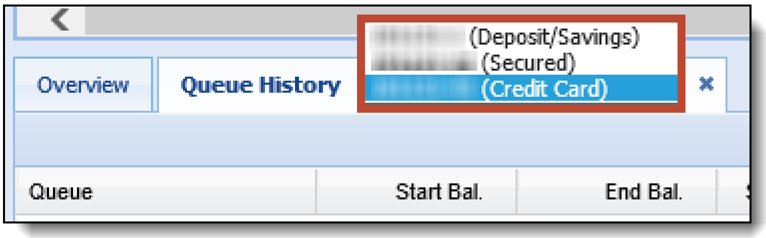
Screen Details

Account Selection

When any account or case screen is open in the workspace, the account selector drop-down within the screen tab can be used to change the screen to display information for the selected account or case.



Select an account from the drop-down to view information for a specific account.



Once the desired account/case is selected, the screen refreshes.

> The account selector drop-down defaults to All for the Promise History screen. When an account/case is selected within the Related Accounts or Related Cases panel, the account selector drop-down defaults to the account/case in context.

Panels

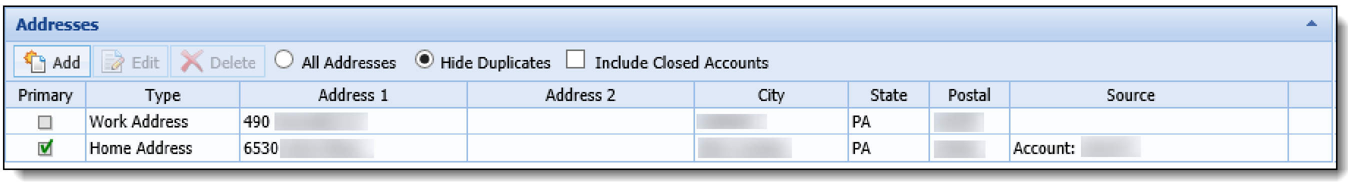
Screens are made up of panels, defined by the system administrator when creating the screen. Each panel may have its own unique behavior. For example, if an account or case panel is on a person screen, the panel is only displayed if it is mapped to the account or case in context in the workspace.

Additionally, a Messages panel can be configured to appear on a person screen to display important messages about the person in context.

> For more information on the Messages panel, please see the Messages Panel on Person Screens topic in this guide.

Address, Phone and Email Panels

Address, Phone and Email panels provide an overview of a person's demographic information in the workspace, as well as allow users to easily add an address, phone, or email record for a person.



The following options are available within the top of the panel to enable the ability to filter the number of records displayed when the panel renders in the workspace:

Panel Filter	Description
All Addresses All Phones All Email Addresses	Select this radio button to display all of the records for the person in context, including the duplicates. This button is labeled "All Addresses," "All Phones," or "All Emails" depending on the panel.

<table>
<tr><td>Hide Duplicates</td><td>By default, the Hide Duplicates button is selected within each panel to hide duplicate address, phone, or email address records in the panel grid.

A record is considered a duplicate if the value in all of its fields are an exact match to another record. If two records have the same values but different cases, 123 Elm Street and 123 elm street for example, they are not considered duplicates.

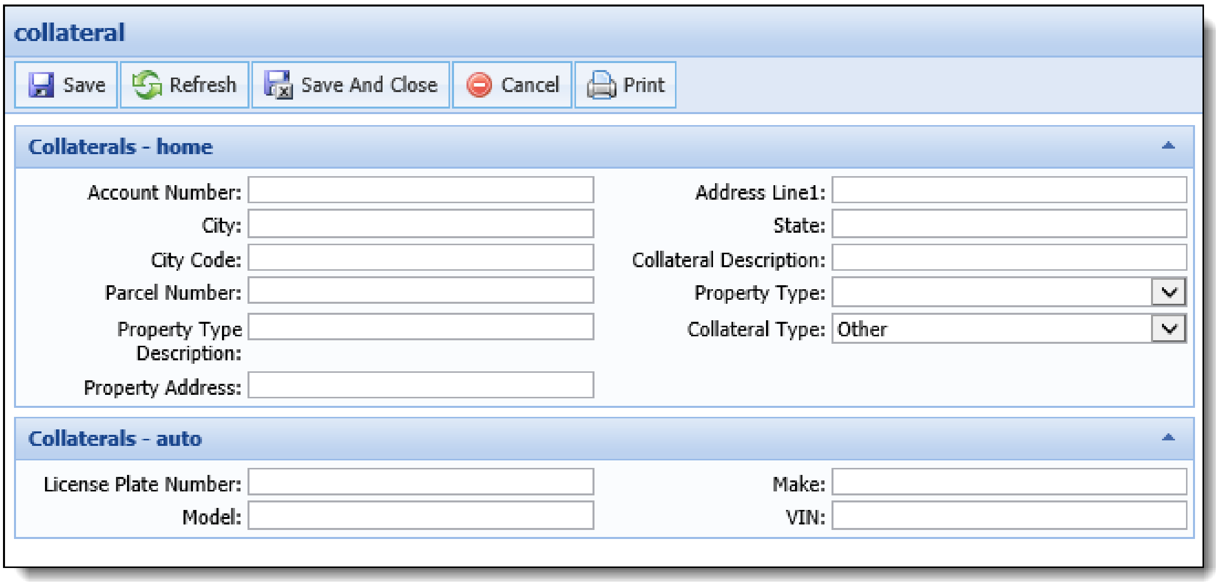
If the Hide Duplicates button is selected and a user tries to edit or delete a record, a message displays indicating the selected record is a duplicate and cannot be edited or deleted in the Hide Duplicates view. Records can only be edited or deleted in the All view.</td></tr>
<tr><td>Include Closed Accounts</td><td>Select this check box to include records related to any closed accounts for the PersonMasterID in the panel. By default, this check box is set to false to exclude records for closed accounts from appearing in the panel grid.</td></tr>
</table>

When rendering accounts in the above panels, the system first looks at the value of the 'Include Closed Accounts' check box, and then reviews the All/Hide Duplicates radio buttons.

- If the Include Closed Accounts check box is selected, and the All Addresses/Email Addresses/Phone Numbers radio button is selected, then all records associated to the PersonMasterID are displayed in the panel, including duplicate records, and those related to closed accounts.
- If the Include Closed Accounts check box is not selected, and the All Addresses/Emails/Phone Numbers radio button is selected, then all records associated to the PersonMasterID, and not linked to a closed account, are displayed in the panel.
- If the Include Closed Accounts check box is selected, and the Hide Duplicates radio button is selected, then a single instance of each record associated to the PersonMasterID is displayed in the panel, including those related to closed accounts.
- If the Include Closed Accounts check box is not selected, and the Hide Duplicates radio button is selected, then a single instance of each record associated to the PersonMasterID, and not linked to a closed account, is displayed in the panel.

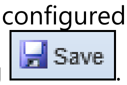
Viewing Screen Details

To view details relating to a record, such as collateral, double-click the record on the panel in the workspace. Once selected, an edit screen displays.



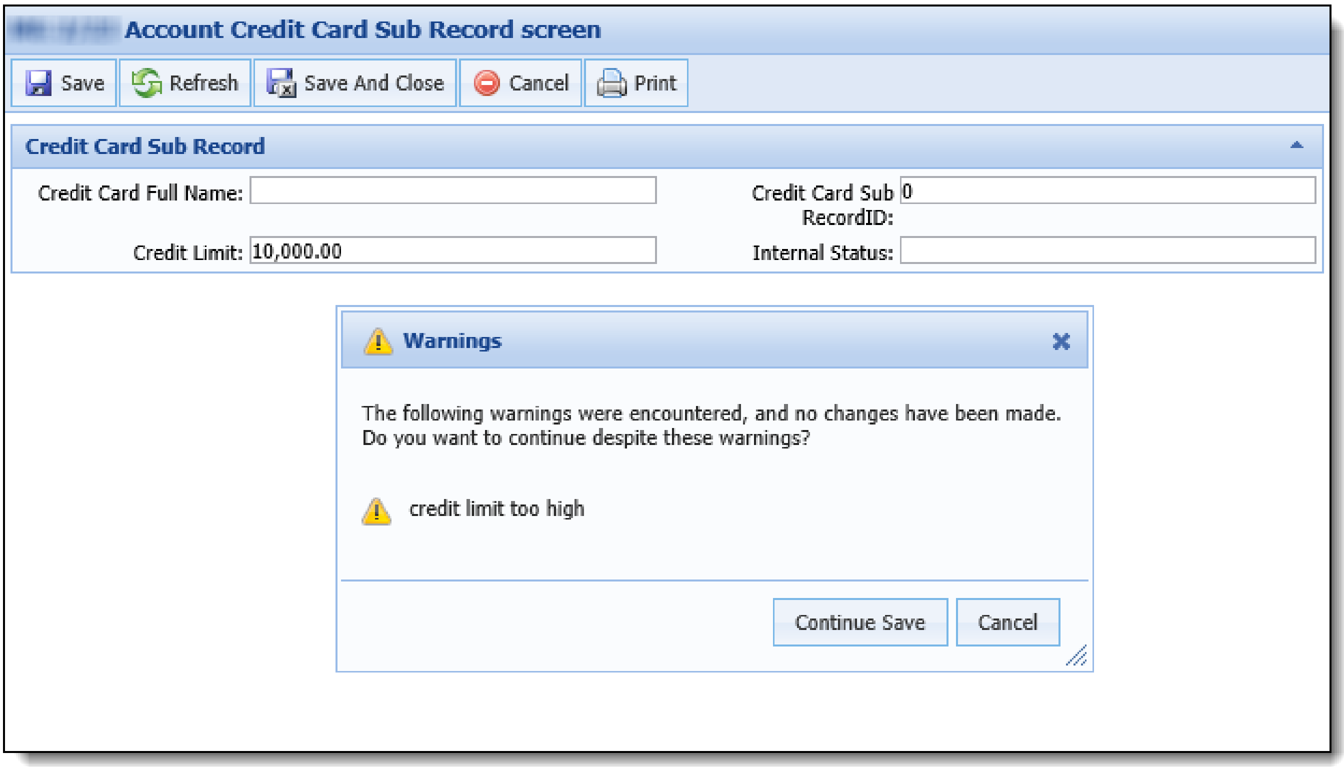
Add or edit any information and click **Save and Close** to return to the workspace. The updated information appears on the screen.

Validation Messages

Validation Rules can be configured by a system administrator to display a message after adding or editing information on a screen and clicking 

. Validation rules can present warning or error messages to the user, alerting them to issues or restrictions related to the information entered on the screen. The message informs the user of the warning or error and provides instructions on how to proceed.

In the example below, a warning validation rule was configured by a system administrator to warn the user when they enter a Credit Limit value that is above $5,000.00. The warning message allows the user to click **Continue Save** to proceed with saving the screen or click **Cancel** to return to the screen to make the necessary adjustments to the information.



Account System Screens

This section provides an overview of the Account system screens that are available in Temenos Infinity:

Screen	Description
Audit-Account	This screen displays user-initiated changes to fields flagged for audit on the account displayed in the workspace. The Account Audit screen displays the user who made the change, date the change was made, the type of change, and a description of the change. For help configuring the fields that are to be flagged, contact a Temenos Customer Care Specialist via a Request case on the Client Portal.
Collection Summary	This screen displays a summary of collection information that includes an Account Summary, Payments, Promises, Letters sent, and call information.
Documents	This screen displays any documents that are associated to the account. From this screen, users can manually upload, view, and delete documents. Also, any emails sent using the Send Email workflow step can be viewed from this screen.
Email History	This screen displays all emails that have been generated for the account in context. Double-clicking an email history record opens a copy of the email exactly how it appeared when it was generated. The most recent email sent appears at the top of the list.
Expenses	This screen displays all collection and recovery expenses recorded for the account in context. From this screen users can add, delete, and update expenses.

Letter History	This screen displays all letters that have been generated for the account in context. Double-clicking a letter history record opens a copy of the letter exactly how it appeared when it was generated. The most recent letter sent appears at the top of the list.
Loan Modification	This screen displays any loan modifications made by a user on an account. The purpose of this screen is to document and process any modifications that are to be made on a loan. From this screen, users can create modifications, edit existing modifications, process modifications, and delete modifications.
Payment History	This screen displays all payments that have been recorded for the account in context. The information on this screen may vary based on whether the payment was taken from within Temenos Infinity, as well as which core the institution uses.
Queue History	This screen displays a list of queues to which the account in context has been assigned. The queue name, starting balance, ending balance, starting days DQ, end days DQ, start DQ amount, end DQ Amount, age, start date, and end date are listed. The View drop-down offers all, delinquency, or charge off queues.

Person System Screens

This section provides an overview of the Person system screens that are available in Temenos Infinity:

Screen	Description
Audit-Person	This screen displays user-initiated changes to fields flagged for audit on the person displayed in the workspace. The Person Audit screen displays the user who made the change, the date the change was made, the type of change, and a description of the change. For help configuring the fields that are to be flagged, contact a Temenos Customer Care Specialist via a Request case on the Client Portal.
Contacts	This screen displays contacts that are related to the person in context. From this screen users can add contacts, add companies, and delete existing contacts. Contacts displayed may contain the name of the contact, the relation to the person, address of the person or company, and email.
Promises	This screen displays all promises made on any accounts related to the person in context. The promise history screen displays the account number the promise was made to, the due date, the date the promise was opened, the status, amount promised, number of payments, amount paid, who created the promise, notes, and reason for delinquency. Users can edit and cancel open promises from this screen. Promises are added by running a workflow and cannot be added directly by a screen.
Workflow History	This screen displays all workflows and comments that have been generated on the account or case in context. The Workflow History screen displays the name of the user who ran the workflow or entered the comment, the name of the workflow, and the date the workflow was ran or the comment was entered.
Related Accounts	This screen displays all of a person's related accounts.

Case System Screens

This section provides an overview of the Case system screens that are available in Temenos Infinity:

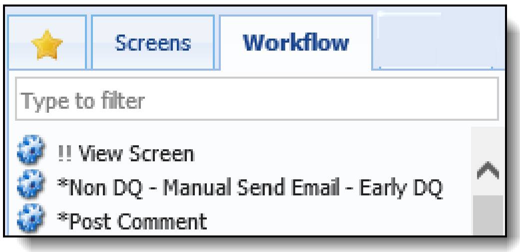
Screen	Description
Audit-Case	This screen displays all user-initiated changes to case fields that have been flagged for audit, for the case in context. The Audit-Case screen displays the user who made the change, date the change was made, the type of change, and a description of the change. For help configuring the fields that are to be flagged, contact a Temenos Customer Care Specialist via a Request case on the Client Portal.
Bankruptcy-Plan Analysis	This screen is used to manage payments to trustees and any payments received. From this screen, users can enter payment plan details, view received bankruptcy payments, and record new bankruptcy payments.
Bankruptcy-Proof of Claim	This screen is used to track Bankruptcy Proof of Claim records on the case in context. From this screen users can add, edit, and view proof of claim requests for each account associated to the case. This screen displays the account suffix, account type, whether it was filed, the date in which it was filed, the proof of claim number, and the date in which it was amended.
Bankruptcy-Reaffirmation	This screen is used to track Bankruptcy Reaffirmation agreements made between the debtor and the financial institution. From this screen users can view/edit reaffirmation agreements by double-clicking an item. This screen displays the account suffix, account type, whether it was filed, whether it was sent to the debtor, whether it was received from the debtor, whether it was sent to court, and the date of the court approval.
Case Tasks	This screen allows enables users to view, add, cancel, delete, and perform tasks that are assigned to a case.
Documents	This screen displays any documents that are associated to a case. From this screen, users can manually upload, view, and delete documents. Emails sent using the Send Email workflow step can be viewed from this screen.
Email History - Case	This screen displays all emails that have been generated for the case in context. Double-clicking on an email history record opens a copy of the email exactly how it appeared when it was generated. The most-recent email sent appears at the top of the list.
Expenses - Case	This screen displays all collection and recovery expenses recorded for the account in context. From this screen users can add, delete, and update expenses.
Letter History - Case	This screen displays all letters that have been generated for a person by the execution of a Send Letter workflow.
Meetings	This screen allows users to track all meetings associated with a case. From the Meetings screen users can view, add, edit, and delete case meetings.

Repossession - Rebates	This screen is used to manage rebates due to the debtor on a repossession such as unearned interest and credit insurance. From this screen users can create, view, edit, and delete repossession rebates. This screen displays the Product Name, Premium Amount, Claim Submitted Date, Rebate Received Date, and Rebate Amount.
Repossession - Repairs	This screen is used to track any repairs made on repossessed items associated to the case in context. From this screen users can create, edit, and delete repairs. This screen displays the Repairer Name, Estimate, Actual, Whether it is covered, Insurance Claim Filed Date, Out for Repair Date, and Repair Completed Date.

Introduction to Workflows

Workflows are predefined step-by-step processes used to perform work within the workspace. Workflows help to streamline processes and ensure that accounts are worked in the proper way. When running a workflow, a user completes the first step and is directed to next steps, if applicable based on the administrator's configuration, until the workflow is completed.

The list of workflows available to execute on the account or case in context are displayed in the left navigation panel of the workspace.



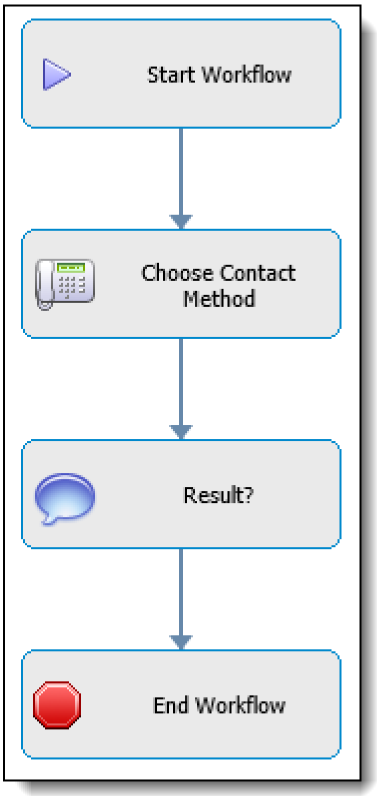
Workflows can be configured to run on a single account or case or multiple accounts or cases. They can also be configured to be manual or automated, where no steps are visible to the user. For more information on multi-account workflows, please see the Multi-Account Workflows section of this guide.

Running a Workflow

To run a workflow on a single account or case, with the account or case in context, click the desired workflow from the list in the left navigation panel.

The workflow displays in the workspace. Enter the information required in the step and click **Go to Next Step**.

Repeat until all steps are complete and a message appears stating the workflow is complete. The Workflow History updates to reflect the workflow has run.



- For example, the No Contact Made workflow is selected to run on an account.
- The first step to complete is to choose a contact method, or to record how contact was made with the account holder.
- When the step is complete, click **Go to Next Step**.
- The next step in the workflow is to record the result of the contact.
- When that step is complete, a message appears stating the workflow is complete.

For more information on running workflows, please see the Running Workflows section of this guide.

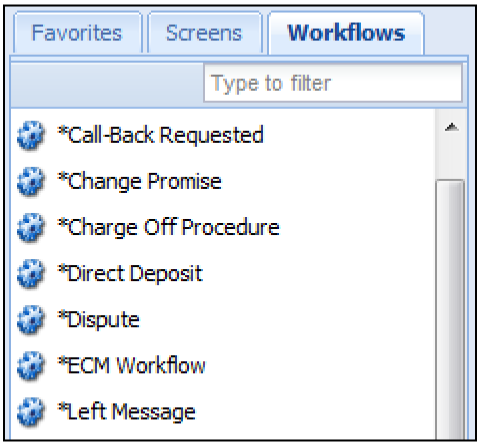
Running Workflows

This section explains how to run workflows on accounts/cases. The list of workflows available to choose is displayed in the left navigation panel. When selecting a workflow the user is prompted with various questions, decisions, tasks, and screens to complete the workflow. Once all of the steps are completed, a message is displayed indicating the workflow has been completed.

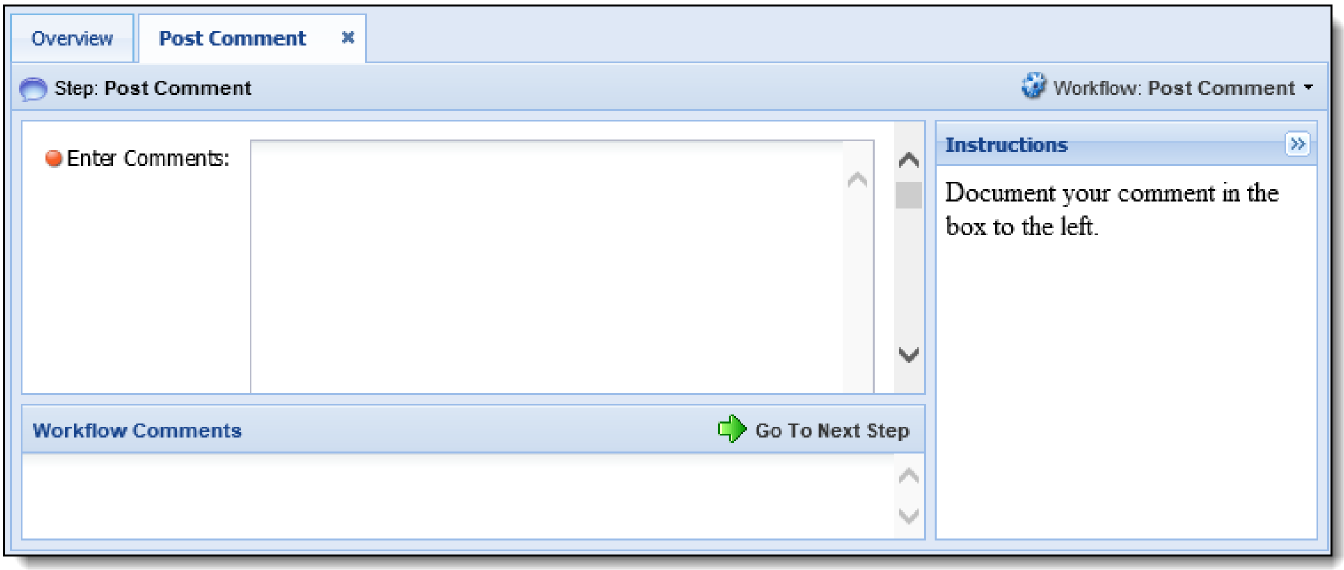
Workflows are configured to be either manual or automated. Automated workflows do not require any manual steps and process automatically once it is selected from the workflow list. The example below shows how to run a manual workflow.

> The list of workflows available to the user is configured by the System Administrator. For more information refer to the System Administrator Guide.

With an account or case in context in the workspace, navigate to the left navigation panel. Click the **Workflows** tab. The list of available workflows for the account or case populates in the tab.



Click to select the workflow to run. The workflow populates within the workspace. The example below is a Post Comment workflow. For a list of System Workflow Steps, please see the Workflow Steps section of this guide.



Enter all required information to complete the workflow step and click **Go To Next Step.**

The Instructions panel to the right of the Workflow step displays a basic set of instructions for running the workflow. If more detailed instructions exist for a workflow, click View Detailed Instructions.

When processing a workflow, users may be required to click Complete in a Task that was automatically completed by the workflow. Refer to the following list to identify the situations in which a task is automatically completed:

- When the workflow is completed within the task, the task is automatically be completed.
- When the workflow is completed outside the task, the task remains open, and requires the user to complete it manually.
- When the workflow is canceled, the task remains open, and requires the user to complete it manually.

If there are no further steps to take, the workflow completes successfully and a confirmation message appears in the workspace. The workflow history updates to indicate the workflow was run.

> Workflow steps may be assigned to workflow queues to which a user does not have access. If a user does not have access to a workflow step, a message appears indicating that the step has been assigned to another user for completion.

Workflow Steps

Below is a list of system workflow steps that can be used within 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, or review with a System Administrator.

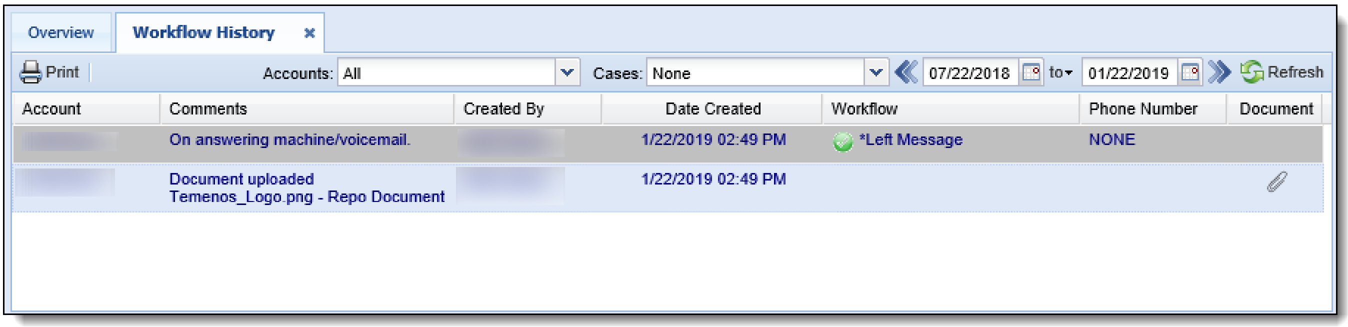
Workflow Step	Description
Assignment	This step is used to change the assignment of an account or remove all assignments from an account. The account can be assigned to any Internal or Third Party queue. This step runs automatically and is not presented to users executing the workflow. This step also 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.
Change Field	This step is used to change a field value to a specified value. This step runs automatically and is not presented to users executing the workflow. Only fields with a one-to-one relationship to an account or case may be changed.
Charge Off Account	This step is used to approve an account that was recommended and approved for charge off.
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 cases in context for the workflow are displayed in the Contact Method drop-down.
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.
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.

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. The Distribution Workflow step distributes accounts evenly across multiple queues. If there are an odd number of accounts satisfying the condition of an Automated workflow including the Distribution Workflow Step, then the accounts are distributed as evenly as possible over the assigned queues. For example, if 131 accounts satisfy the condition of the Automated workflow and three queues are assigned to the Distribution Step, then the accounts are distributed as follows: 44, 44, 43.
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 while a workflow is running 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.
Income Interruption End Deferment	This step is used to terminate an active deferment by selecting a deferment date from the calendar.
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 on Income Interruption rules created within Rules Manager, accounts placed in the review section need to be approved or rejected via this workflow step.
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.
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.
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.
Promise to Pay	This step is used to record a promise to pay on account(s) in context for the workflow.
Reason	This step is used to prompt users to select the account holder's reason for delinquency from a list of available values.
Recommend for Charge Off	This step is used to recommend an account for charge off.
Recommendation Approval	This step is used to approve a recommendation for charge off.

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."
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.
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.
Set GL Amounts	This step is used to allocate money to individual general ledger accounts during the charge off process.
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.
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 under System Management > Workflow > Workflow Reason Codes.
View Screen	This step is used to display a screen in a workflow with a set of instructions.

Workflow History

The Workflow History screen displays all comments and workflows that have been run on the person in context.



Each comment and workflow processed on the person in context is itemized within a grid containing the following columns:

Column Name	Description

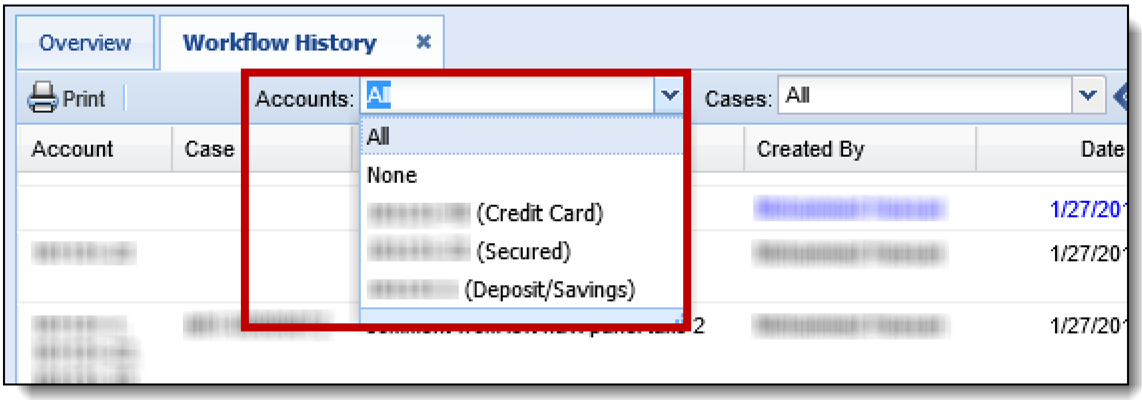
Account	Displays the account on which the workflow was run or comment was added. This column only appears when All is selected from the Accounts drop-down at the top of the screen.
Case	Displays the case on which the workflow was run or comment was added. This column only appears when All is selected from the Cases drop-down at the top of the screen.
Comments	Displays the comments added for the person via a workflow, the Post Comment box in the workspace, or automatically through other processes. If the comment is for a document upload event, the Comments column displays the following: "Document uploaded" & File Name & Description field in the Documents Upload screen.
Created By	Displays the name of the user who added the comment or processed the workflow.
Date Created	Displays the date the comment was added or the workflow was initiated.
Workflow	Displays the name of the workflow processed on the account or case. If comments were added while working a workflow, the name of the workflow is displayed in this column. If comments were added from the workspace or automatically through other processes, the name of the workflow is not displayed in this column. • The icon displayed before the name of the workflow indicates that the workflow has been completed. Right-click on this icon to view the workflow details or to copy the comment. • The icon displayed before the name of the workflow indicates that the workflow is incomplete. Right-click on this icon to view the workflow details, complete the workflow, cancel the workflow, or copy the comment. • The icon displayed before the name of the workflow indicates that the workflow was cancelled. Right-click on this icon to view the workflow details or to copy the comment.
Phone Number	Displays the phone number used while working the account.
Document	Displays a if a document was uploaded via the Account Documents screen. Upon clicking , the uploaded document opens in a new window.

Filter Workflow History by Accounts or Cases

By default, the Workflow History screen displays comments and workflows on all accounts and cases for the person in context.

> If a specific account or case is in context upon opening the workspace, such as through an account or case search or by clicking Get Next in a queue, the Workflow History screen is filtered to display comments and workflows for only that specific account or case.

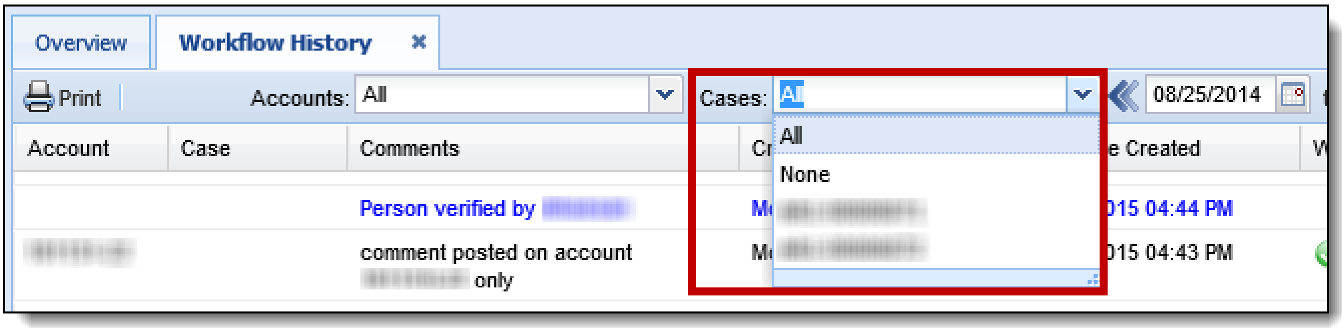
To filter the Workflow History by accounts, click the **Accounts** drop-down and select All, None, or a specific account number. The grid updates to display the desired option.



To filter the Workflow History by cases, click the **Cases** drop-down and select All, None, or a specific case number.

If a person is not related to a case, None is the only option available in the Cases drop-down.

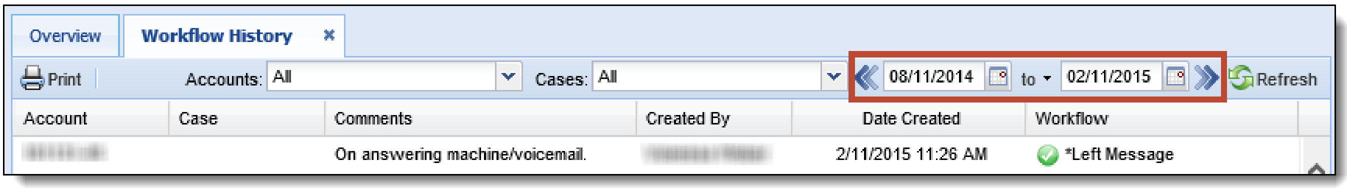
The grid updates to display the desired option.



Any combination of accounts and cases can be selected from the drop-downs to display in the Workflow History.

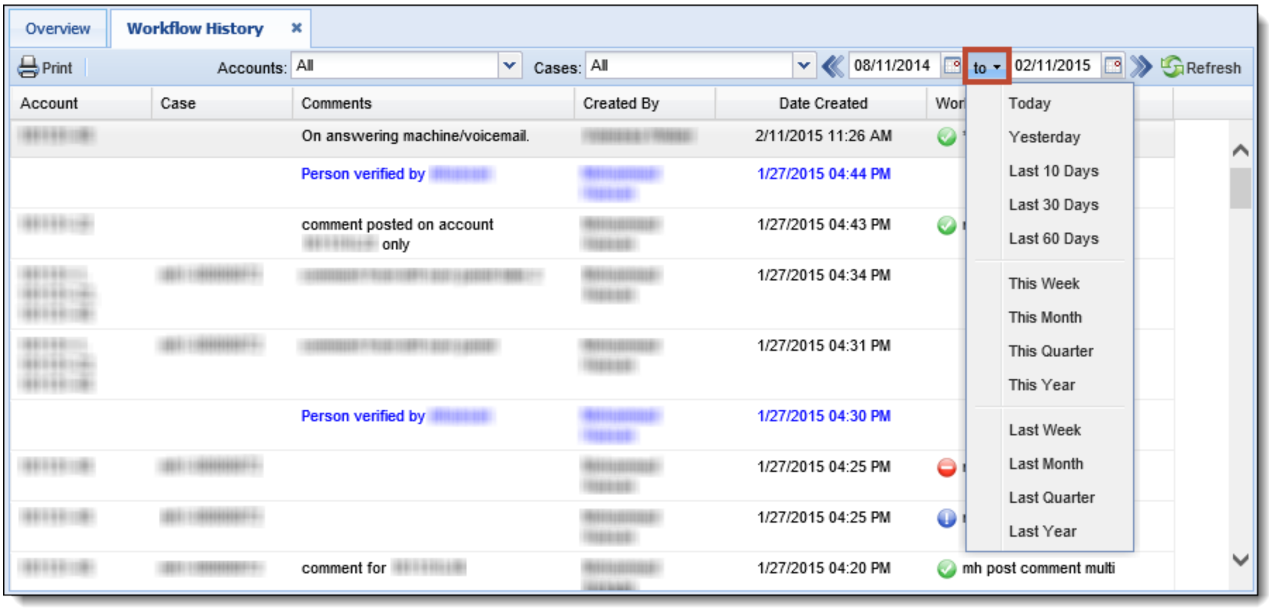
Filter Workflow History by Date

By default, the Workflow History screen displays all changes made within the last 30 days; however, users are able to refine the results displayed in the grid by modifying the date range.



The date range can be modified by using one of the following methods:

- Click the  button to change the date range to the previous 30 days.
- Click the  button to change the date range to the next 30 days.
- Manually enter dates into the **To** and **From** text boxes.
- Select a pre-configured date range from the **To** drop-down list.



After the date range is selected, click Refresh to update the grid to display the desired option.

Printing Workflow History

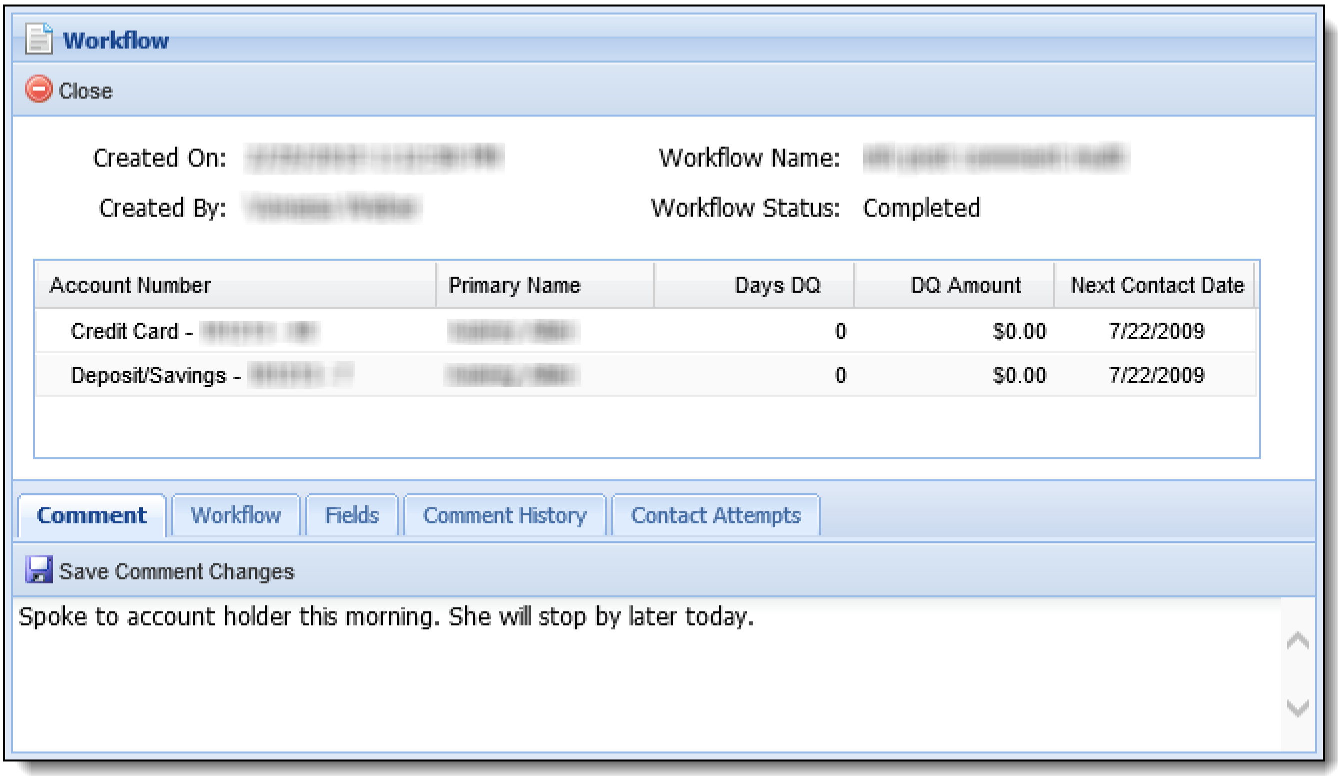
To print the Workflow History grid, click Print. The Windows print settings window displays.

Define the printing preferences and click **Print**.

> Screen name, account number, and suffix are included when the screen is printed.

Workflow History Details

Double-clicking a workflow history item in the grid opens the Workflow History Detail screen. From this screen users can edit comments and view details such as comment history, workflow design, fields, and previous contact attempts.



The Workflow History Detail screen contains the following information separated into tabs.

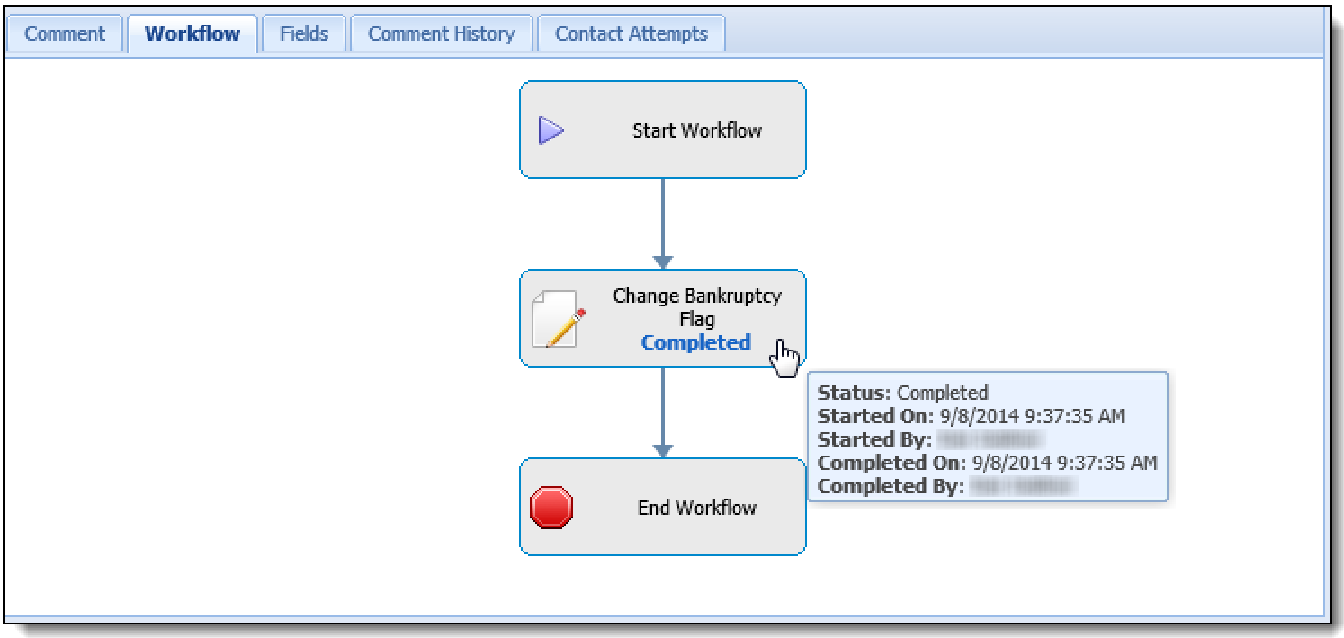
Comment

The Comment tab displays the comments generated by the workflow, as shown in the above example. If the Edit Comments permissions are granted by a system administrator in System Management > Users, the comments can be edited from this tab.

Make any comment changes and click Save Comment Changes. The changes are recorded on the Comment History tab of the Workflow History Detail screen.

Workflow

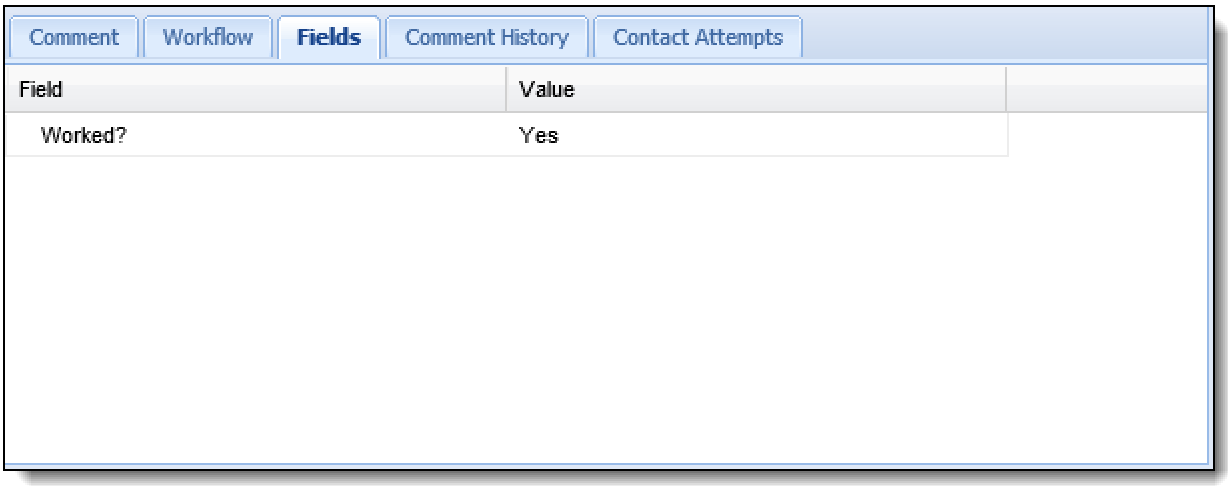
The Workflow tab displays the layout of the workflow. Hover the mouse over an individual workflow step to display its status, the date it was started and completed, and the users who started and completed the step.



Fields

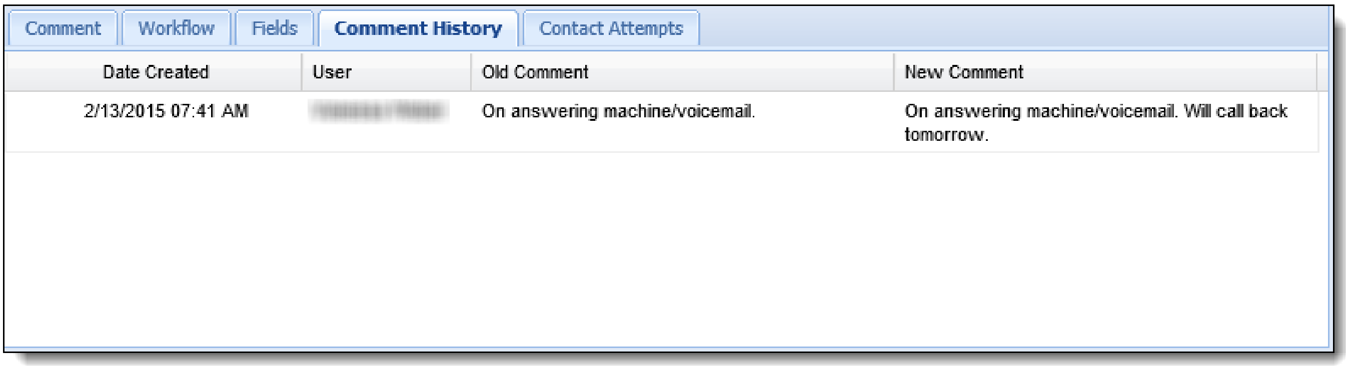
The Fields tab displays any workflow fields that were renamed by the system administrator during configuration of the workflow. Workflow fields are stored within the workflow when it is executed and can only be viewed on this tab.

> If Count as Worked is set true for the workflow, the Worked? field is updated to Yes within this tab once the workflow completes.



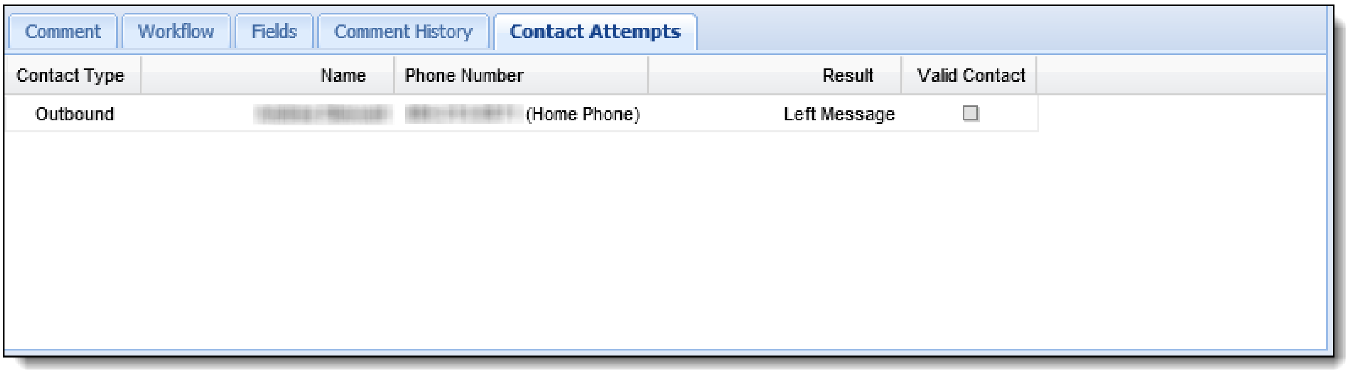
Comment History

The Comment History tab displays a record of the edits that occurred on the comment via the Comment tab of the Workflow History Detail screen. The edit date, the user who edited the comment, the comment before the change, and the comment after the change are displayed.



Contact Attempts

If the workflow contains a Contact Method step, the Contact Attempts tab displays the contact methods recorded through the workflow step. The contact type, name of the account holder, their phone number, the result of the contact, and if it is considered a valid contact are displayed.



When finished viewing the Workflow History Detail screen, click Close to exit the screen.