

WorkSpace

 We have moved to a new documentation platform. This section is no longer supported. For the up-to-date information, see [WorkSpace user guide](#).

 The guide below describes basic steps on how to work with WorkSpace, that is an application used for decision-making when processing manual tasks created in [Control Tower](#).

 To view full functionality WorkSpace provides for Enterprise Edition users, see [here](#).

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On running a business process that [contains a manual task](#), as soon as it comes to the manual task, it is transferred to WorkSpace, where you accept it, process, and submit the answer, so that the bot can continue the work based on your decision.

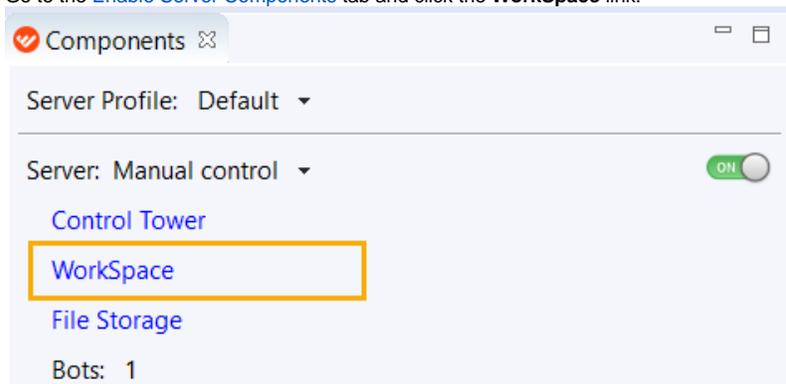
Thus, WorkSpace serves as a web platform, for you to:

- [look for](#) tasks
- view [statistics](#)
- [accept](#) and [submit](#) tasks

Getting Started

To get to WorkSpace from [WorkFusion Studio](#), do as follows.

1. Go to the [Enable Server Components](#) tab and click the **WorkSpace** link.



2. Log in using your credentials you have [specified](#) during installation.

LOG IN TO WORKSPACE

Username

Password

Log in OR **Register**

As soon as you are logged in, you can either view your statistics, or [get to work with manual tasks](#) in case there are any.

Viewing Statistics

The **Dashboard** tab is by default the first screen displayed when you have logged in to Workspace. It contains a summary of significant events associated with your user profile.

Workspace **Dashboard** Tasks Help WorkFusion Express

ACTIVE TASKS

No active tasks

STATISTICS

All Last 24 hours Last week Last 30 days Past month

Total Hours Worked

22 minutes 0 seconds

Tasks Total

Tasks You Have Accepted		Tasks You Have Submitted	
Tasks Accepted	15	Tasks Submitted	14
Tasks Submitted	14	Tasks Approved	14
Tasks Returned	1	Tasks Rejected	0
Tasks Abandoned	0	Tasks Pending	0

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Active Tasks

The **Active Tasks** section displays the tasks you are currently working on. These are the tasks that you have accepted but have not submitted yet, thus they can be revisited (until they expire).

You can keep track of active tasks by using the **Time left** field which is dynamically calculated based on the expiration time set for the task.

ACTIVE TASKS		
Task	Accept time	Time left
Extract invoice fields	4/30/19 10:01 AM	8 minutes 57 seconds

Statistics

WorkSpace accumulates statistics based on the tasks you have accepted and submitted. **Dashboard** lists the total amount of hours worked and the total number of tasks.

You can filter your statistics based on the time period that best suits your needs. To set the way your statistical data is filtered, click the appropriate filter button (**All**, **Last 24 hours**, **Last week**, **Last 30 days**, **Past month**).

STATISTICS

All
Last 24 hours
Last week
Last 30 days
Past month

Total Hours Worked

22 minutes 0 seconds

Tasks Total

Tasks You Have Accepted		Tasks You Have Submitted	
Tasks Accepted	15	Tasks Submitted	14
Tasks Submitted	14	Tasks Approved	14
Tasks Returned	0	Tasks Rejected	0
Tasks Abandoned	0	Tasks Pending	0

Processing Tasks

The **Tasks** tab contains your scope of tasks to be processed. Use the search field to filter your tasks. The field accepts keywords as well as more advanced search terms.

WorkSpace Dashboard Tasks
Help ▼ WorkFusion Express ▼

SELECT CATEGORY

Other
1

Miscellaneous Tasks
1

Within the **Select Category** section, you can select a category where your tasks are grouped. To view the tasks related to any of the categories, click on the specific category below.

SELECT CATEGORY

Other 10

Miscellaneous Tasks 10

Under the selected category, the task groups together with the total number of tasks to be processed will be displayed.

TASKS [Expand all](#) | [Collapse all](#) Order by: Creation date (latest first) ▼

▶ [Extract invoice fields](#) **View** ▼

Expires: 30 May 2019, 09:49 (4 weeks 1 day) **Number of tasks:** 10

The general procedure of working with tasks is as follows.

- [Accept](#) the task.
- Carefully read the task instructions and start working on it. Watch the timer to complete the task in time.
- [Submit](#) the task when you are done.

Accepting Tasks

Let's see the whole procedure from the very beginning. As soon as you [run your business process](#) in Control Tower and the turn comes to a [manual task](#) within it, it's time to check Workspace.

Click on the task group name to view detailed information.

TASKS [Expand all](#) | [Collapse all](#) Order by: Creation date (latest first) ▼

▶ [Extract invoice fields](#) **View** ▼

Expires: 30 May 2019, 09:49 (4 weeks 1 day)
Requester: cv_system_requester
Description: Miscellaneous Tasks
Task created: 29 Apr 2019, 12:08
Keywords: Miscellaneous Tasks, 1
Time allotted: 30 minutes
Qualifications required: None

Number of tasks: 10

To continue working on the task, you should accept it.

- Either click the **View** dropdown and select **Accept**.

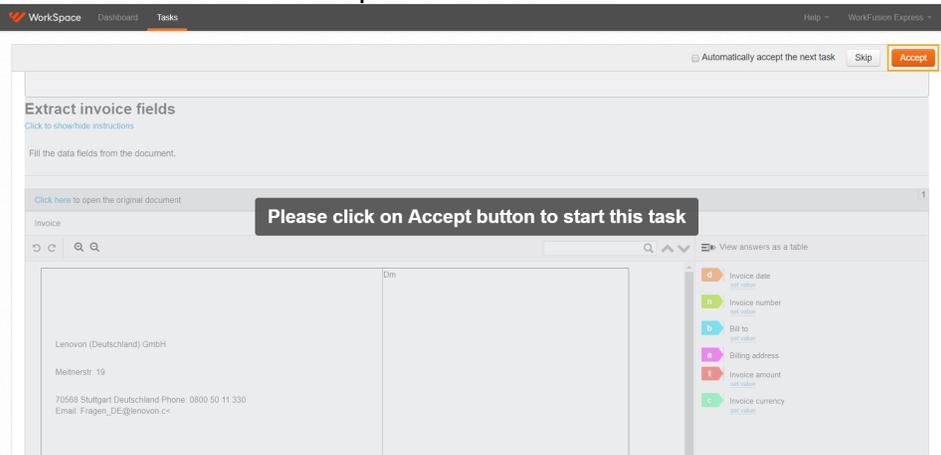
TASKS [Expand all](#) | [Collapse all](#) Order by: Creation date (latest first) ▼

▶ [Extract invoice fields](#) **View** ▼

Expires: 30 May 2019, 09:49 (4 weeks 1 day)

Accept

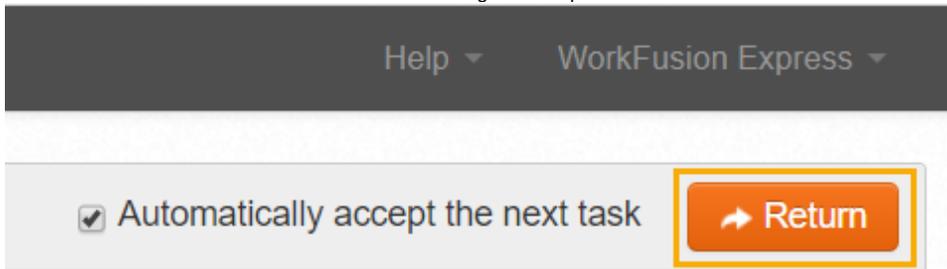
- Or click the **View** button and select **Accept** on the screen that follows.



i Click the **Automatically accept the next task** checkbox, to accept all tasks and have them load automatically after you submit your answer. All accepted tasks are displayed on your Dashboard as **Active Tasks**.

Executing Tasks

- As soon as you have accepted the task, the task timer starts. On the **Dashboard** tab, watch **the timer** to complete the task in time. If you cannot complete a task (lack of time, the task is too complicated, problems with Internet, etc.), click the **Return** button in the upper right corner. It is better to return a task than to submit wrong or incomplete answers.



- Carefully read the task instructions. You can expand or collapse the instructions section by using the **Click to show/hide instructions** link.



- Process the tasks one by one in the queue.

i You have an option to **Skip** a task by clicking on the appropriate button. In that case, the task will not be available for some time, though you will be able to accept other tasks in the same task group.

The progress status is displayed in **Control Tower** too.



Submitting Tasks

On having provided all the required task answers, check yourself, and click the **Submit** button in the bottom left corner. You can check your statistics of approved and rejected tasks on the **Dashboard** tab.

Extract invoice fields

[Click to show/hide instructions](#)

Fill the data fields from the document.

Click [here](#) to open the original document

Invoice

View answers as a table

Microzont Corporation		Order Number 11820417		INVOICE		
One Microzont Way		Invoice No.: 2205101		Date 12.01.2016		
Redmond WA 97052		Bill to:		SABBR Deutschland AG & Co. Hasso.		
Phone: 1 687 555 2345		Plattner-Ring 6		Walldorf 69290 Germany		
Email: gates@microzont.com		Phone: 49 6207 7 47474		sales@sabbr.com		
No	Item	Description	Quantity	Discount	Tax rate	Price (USD)
1	Windoors Server	R2 edition license	2	10%	0	2200
	2012					
2	Windoors Server	Server and security	2	10%	0	500
	Essentials	essentials				
			Subtotal			2700
			Tax			0
			Discount			270
			Total			2430

- d Invoice date 01/12/2016
- n Invoice number 2205101
- b Bill to SABBR Deutschland AG & Co. Hasso-Plattner-Ring 6 Walldorf 69290 Germany
- a Billing address 1
- t Invoice amount 2430
- c Invoice currency USD

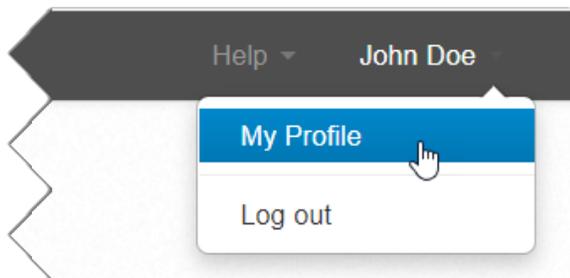
Submit

As soon as you finish with all the tasks in the queue, you will see the following messages.

No more tasks of this type are available for you. Try to **find** other tasks in categories available for you.

Your results have been submitted and will be approved or rejected shortly. You can use the following code as a unique reference for the task you have just submitted : . Start working on new tasks by clicking **Accept** button.

Changing Profile Settings



The user profile menu enables you to edit your profile information and log out. To access your user profile, select **My Profile** from the user profile menu in the upper right corner.

To specify or edit your profile information, do as follows.

1. Enter your data in the appropriate input fields.
2. Click the **Update** button at the bottom.

YOUR PROFILE

Your ID	<input type="text" value="DEFAULTCLICKWORKERUSERV"/>
Profile Name	<input type="text"/>
Email	<input type="text" value="john.doe@mycompany.com"/>
Name*	<input type="text" value="John"/>
Last Name	<input type="text" value="Doe"/>
Organization	<input type="text" value="MyCompany"/>
Time Zone	<input type="text" value="GMT"/>
Locale	<input type="text" value="English"/>
Current Password	<input type="password" value="....."/> <small>Leave blank if you don't want to change it</small>
New Password	<input type="password"/>
Repeat New Password	<input type="password"/>
Receive email notifications	<input type="checkbox"/>

Your profile page contains both read-only and input fields.

- Read-only fields:
 - **Your ID**
 - **Profile Name**
- Input fields:
 - **Email** – the email address used for notifications and authorization
 - **Name**
 - **Last Name**
 - **Organization**
 - **Time Zone**
 - **Locale** – WorkSpace UI language – you can select either English, Spanish, or Japanese

Locale	<input type="text" value="English"/>
	<input type="text" value="English"/>
	<input type="text" value="Española"/>
	<input type="text" value="日本人"/>

 Available from WorkFusion Intelligent Automation Cloud – Express and Business

2.4.0

• **Current Password, New Password, Repeat New Password**

 To change your password, you must enter your current password together with a new one, and repeat the new password to confirm.

- **Receive email notifications** (optional)