

Workspace 2 – Key processes

00:00:00.000 --> 00:00:14.270

Jamie Webster

Hi, this video will show how to use the DXP version of Workspace 2 up to down load data collection documents to put data in them to submit them to TC show how to upload a document like a plan document.

00:00:14.830 --> 00:00:17.280

Jamie Webster

A man how to navigate around that application.

00:00:18.700 --> 00:00:30.000

Jamie Webster

This system replaces the existing workspace to application inputs onto a modern web application, but the processes and the data in the files is or staying the same.

00:00:30.680 --> 00:00:48.870

Jamie Webster

Ah, so when you first come to the new application, you're presented with the option to log in using ESL education, sector login or TC staff, or click here. We've got some links here to the customer service, so if you have any problems accessing the application, please contact us on this number or this email address.

00:00:50.130 --> 00:00:55.490

Jamie Webster

So you'll be able to use your existing education sector login account to access the application.

00:00:59.080 --> 00:01:01.310

Jamie Webster

I'm going to use a test account today.

00:01:05.580 --> 00:01:23.700

Jamie Webster

It's when you first log into the application you're going to landing page that similar to today's, so you'll have a list of pages down the left hand side. We've got a home page, my documents archived, and terms of use. You can see the organization that you're logged in as in the top left corner on the top right.

00:01:24.960 --> 00:01:45.920

Jamie Webster

So initially when we go live or just have Workspace 2 available, we are adding, uh, it's Dio application for SDR and the registers, but that will be later next year and there will be the option to a log out as well in the middle. Here we've got notices, so these are any messages that TC want to share with. You will be available here.

00:01:46.230 --> 00:01:54.420

Jamie Webster

Uhm, you'll see the title and has more build up. You'll be able to see more and you can click on one of these to see more details.

00:01:55.930 --> 00:02:26.280

Jamie Webster

Down the bottom here again, we've got links to the customer service email address at numbers, so if you have any problems using the application you can get in touch with us. One thing we've changed on this front screen is if there's documents that TC want to share with all organisations that will provide us the lists of those documents. It can be accessed here on the first screen, so we've got notices here and if I click shared documents, this list as arguments will be ones that aren't specific to your organization. These are documents that are being shared with all organisations.

00:02:26.800 --> 00:02:33.660

Jamie Webster

So we've got things like the user guide for the new application, the fees free eligibility lists. They'll be here as well.

00:02:34.790 --> 00:02:55.200

Jamie Webster

So you see, for these grids, UM, when I hover over a row and say it's highlighting that row, and if I click anywhere on the row, it's going to download the document or right click on the file name. It also download it. Grids like this are used throughout the application, so you can see here. There's the option to change the number of items that are seen on a page.

00:02:56.100 --> 00:02:58.150

Jamie Webster

Uh, we can go to the next page.

00:02:59.050 --> 00:03:10.120

Jamie Webster

The previous page, the last page and the first page here. There's not many, so you can't really tell. But when we get to my documents, you'll see that I'm just going to click here to download the new user guide.

00:03:11.850 --> 00:03:33.180

Jamie Webster

So the new application it doesn't use Microsoft SharePoint at all. There's no concept of checking out documents and checking them in. Everything works by downloading documents. I'm having them locally and then uploading the back end. The application will work the same no matter what browser you're using. So Chrome, Firefox, Edge, and Safari on Mac or supported.

00:03:34.110 --> 00:03:34.660

Jamie Webster

Uhm?

00:03:35.260 --> 00:04:01.860

Jamie Webster

And I've just downloaded this user guide so you can see I click here to open it up. So this is the updated workspace. 2 user guides. This will be available within. The application. Will also be on the website as well, so it's got updated screenshots throughout and any minor changes that we've made have reflected in this document at the back of the document there is a fake, so if there's any questions you have, you might be able to find an answer here.

00:04:03.770 --> 00:04:07.140

Jamie Webster

So the main page you want to be using is my documents.

00:04:08.660 --> 00:04:31.210

Jamie Webster

And so this page is going to list all of the documents that TC have shared review and you are sharing with TC and all of the files will be migrated across from the old Workspace 2 application into this one. So all of the data collection spreadsheets, any PDFs or word documents that you've shared with CC, and they're all going to be broad across and their little display here.

00:04:32.030 --> 00:05:01.200

Jamie Webster

Everything about the files will be the same as that we're using the same files for this release. We're not changing the data, none of the rules in the spreadsheet will have changed the data collection documents will still have the same status is, so they start in a provision state they go to draft when you upload some data there, then go to submitted or submitted failed validation and we're going to show you what that looks like for a couple of documents today.

00:05:02.120 --> 00:05:07.760

Jamie Webster

This grid here UM, so again, you can see as I kind of hover over a line, it gets highlighted.

00:05:08.390 --> 00:05:15.460

Jamie Webster

Come and we've got the same paging functionality down the bottom. Here to go to the next page. Previous page.

00:05:17.260 --> 00:05:19.730

Jamie Webster

The grid itself will be sorted by.

00:05:21.020 --> 00:05:25.000

Jamie Webster

The ones that have most recently been modified will be displayed at this up by default.

00:05:25.490 --> 00:05:25.930

Jamie Webster

Uhm?

00:05:27.170 --> 00:05:40.810

Jamie Webster

So you'll see the latest documents at the top. Any that have been kind of modified within the last three days. We'll get a little icon just highlighting that something changed. You can click on any of these rows to change the sort order.

00:05:42.310 --> 00:05:43.890

Jamie Webster

Either ascending or descending.

00:05:45.940 --> 00:05:51.130

Jamie Webster

But most of the time now you're probably gonna wanna see the recently changed once at the top.

00:05:52.790 --> 00:06:21.690

Jamie Webster

You can also use up here to search through those documents, so if there's a specific fund or specific year that you want to see files for, you can use a combination of all of these fields, or one or none to be able to search for documents. So the first one we're going to be looking at is this Saquon. That's the top row here. So if I specifically wanted to find that, I could pick the fund and the year that I'm looking for and search and it's just going to narrow down the documents and find that specific one.

00:06:23.100 --> 00:06:24.070

Jamie Webster

Uh, so.

00:06:24.840 --> 00:06:35.010

Jamie Webster

If you click on a row on this page because there's more actions that you can do with these files. If I click on the row anywhere, that's not the filename itself, it's going to pop up this little actions menu.

00:06:35.660 --> 00:07:06.010

Jamie Webster

That's going to give me some summary information about the document so I can see the file name at the top. The correlation ID is a unique identifier for the data collection spreadsheets that ID is within the spreadsheet file itself and also in the application, so it can be used to help troubleshoot when things go wrong. If something is not matching about the spreadsheet, this number can be used to kind of help find what's gone. Wrong effects have put a date that they had, like the document returned by submitted by.

00:07:06.330 --> 00:07:10.500

Jamie Webster

You can say that will show up here as the due date and again we can see when it was last changed.

00:07:11.440 --> 00:07:41.600

Jamie Webster

Some of the actions you can take, some will be determined by what status the document is in, so this is a provision state, so we can see we're able to download it, but able to upload a draft version, but we're not able to submit it at the moment because it's provisioned doesn't have any data in it. You can always see the version history, so as this document goes on the journey from provision to submit it, that's kind of build up overtime here, and you can use this screen to download the document as it looked.

00:07:41.650 --> 00:07:49.660

Jamie Webster

Any point in time? So if you need to recover your old data in a file for whatever reason you ever come in here, click here and it's gonna download that.

00:07:50.580 --> 00:07:54.480

Jamie Webster

Also, any comments that have been left by either you or the TC will show here too.

00:07:56.450 --> 00:08:11.030

Jamie Webster

So as I said, we're no longer using SharePoint. There's no concept of checking out documents and checking in, so for us to add data into this file and submit it back, we need to download it. We're going to work on it locally, upload the file back in, and then submit it.

00:08:12.140 --> 00:08:16.320

Jamie Webster

To download the file, oh, we've got two options we gave a click on the file name.

00:08:17.380 --> 00:08:21.560

Jamie Webster

Or we can click here, click download. I'm just gonna click on the file name.

00:08:22.930 --> 00:08:24.140

Jamie Webster

And it's going to download the file.

00:08:25.040 --> 00:08:34.060

Jamie Webster

Every file that save it downloaded from the application or uploaded get some malware scanned, so keep her safe, keep you safe and it's kind of download there.

00:08:37.760 --> 00:08:51.630

Jamie Webster

The documents themselves. Everything about these is the same as the current application and will be migrating them across in whatever state they're at, so they'll still have your data. And if you've already uploaded some some data into them, everything about them is the same.

00:08:52.340 --> 00:09:04.230

Jamie Webster

Depending on your version of Excel and your policies and things like that, you'll often have to click some button just to say that you trust the document. So you see here it's not applied any of the formulas yet, but when I click this.

00:09:05.030 --> 00:09:33.110

Jamie Webster

Now, does assets now kind of an active blog document? All of these are structured in a similar way. So first you'll have an instruction sheet or a note sheet. This tells you what this data collection spreadsheet is about. It gives you some specific instructions on what we're expecting for each field gives you a note about some of the rules and things like that, and then there'll be a report sheet. This is where you add the data that's going to be shared with TC.

00:09:33.970 --> 00:09:39.050

Jamie Webster

Often they'll be some kind of spare worksheets that you can use to help prepare some of the data.

00:09:40.370 --> 00:09:51.610

Jamie Webster

So what I'm gonna do is add a couple of rows of data to this file, come in one of the rows I'm going to include a error on purpose to show what it's like when the data fails validation.

00:09:52.280 --> 00:09:55.240

Jamie Webster

Then we're gonna kind of correct that error and submit it again.

00:09:57.500 --> 00:10:08.780

Jamie Webster

For the rules, again, there's a mixture of rules that are applied within the spreadsheet themselves to give you quick feedback, but some of the rules can only be applied when you submit the template.

00:10:10.350 --> 00:10:21.600

Jamie Webster

So for this template you have to pick a combination of funding category and course classification code and say how many deaths are going to deliver against it. So for the 1st 40 I'm going to put it in a good combination.

00:10:22.450 --> 00:10:28.980

Jamie Webster

I'm just to show that there's still some rules applied in the spreadsheet, and that they're all the same if I try to enter a negative number, that's.

00:10:29.670 --> 00:10:36.120

Jamie Webster

Kind of applied in the spreadsheet, so it's going to tell me, hey, that wasn't good. He needs to try again. So instead we're going to put in.

00:10:36.790 --> 00:10:37.130

Jamie Webster

Number.

00:10:43.260 --> 00:11:03.490

Jamie Webster

So that first row has got a valid combination, so we're expecting that to pass for the 2nd row. I'm going to put in an invalid combination, so V1 is kind of science and I'm going to combine that with art, which is not valid, and it's not a rule that's applied in the spreadsheet or check there, so we're going to see that error later on.

00:11:06.640 --> 00:11:21.680

Jamie Webster

So at the moment I'm just working on this file. It's in my kind of downloads folder. It's not, you know, within the application itself. It's not checked out or anything like that, so I need to save it. This is kind of updated my local version of the file.

00:11:22.550 --> 00:11:25.580

Jamie Webster

Uh, and then I need to get the file back into the system.

00:11:26.510 --> 00:11:45.040

Jamie Webster

There's two ways to upload a document. There's even this upload document button here, so you can use that to upload any type of document. One of these spreadsheets, or maybe your plan document. Now we're going to show you that later on the other way is to click on the specific row that you're trying to update and click upload draft.

00:11:46.320 --> 00:11:48.230

Jamie Webster

So I'm gonna prompt you to select a file.

00:11:49.800 --> 00:11:52.780

Jamie Webster

Now we're gonna pick that one that we just downloaded and updated.

00:11:54.590 --> 00:12:00.540

Jamie Webster

I'm gonna hit save and this is gonna scan the document and then upload that into the application.

00:12:05.230 --> 00:12:33.410

Jamie Webster

So we got a little message to say that that worked and we can see that the this row here has updated to draft, so it's got some of our data and and the modified date changed, so that's good. So what we want to do now is submit this document. So I think in the current application you'd often get kind of spinning thing here and then it will say submit for us. Yeah to click onto the row.

00:12:33.480 --> 00:12:36.140

Jamie Webster

Then click submit here. So it's one of the actions that you can do.

00:12:36.850 --> 00:12:37.260

Jamie Webster

Uhm?

00:12:38.350 --> 00:12:49.190

Jamie Webster

This wasn't available, just gonna show here when something is provisioned, so we've got no submit option. But now that it's in a draft state and it's got some new data, and that's memorable to submit.

00:12:50.180 --> 00:13:21.450

Jamie Webster

Another change with the new application is what happens when you click submit an existing application. Everything would always go to kind of Q&A back end process and you'd be told to come back and check the results later. Uhm, that makes sense for a lot of the larger files that have 10s of thousands of rows, but we know that a lot of data that we collect a quite small so they don't have many rows at all. So for those when you hit submit, it's going to immediately try to work out whether the data is good.

00:13:21.510 --> 00:13:51.250

Jamie Webster

Whether it passes validation and give you an immediate response rather than queuing it up and you having to come back later, yeah, I think it's configured to spreadsheets that are under 300 rows initially, so anything under 300 rows when I hit submit, it's going to apply the validation rule straight away and let me know what the result was for anything over 300. It's going to queue it up. We're going to show today a kind of file doing both different paths, so for this one we only had two rows of data.

00:13:51.650 --> 00:14:04.060

Jamie Webster

So we're expecting when I hit submit, it's immediately gonna try to apply the validation rules. We put an error in the file on purpose, so it's hopefully going to say this failed validation and it's going to produce an error report for us.

00:14:05.140 --> 00:14:06.130

Jamie Webster

So I'm gonna hit submit.

00:14:11.000 --> 00:14:30.460

Jamie Webster

And we can see we got a message at the top here to say that that submission did not validate correctly. Other oh has updated to failed validation and we see a neuro has appeared at the top. It's got the same kind of filename up to a point and then it says validation result. And that's the error report that's going to tell us what we did wrong.

00:14:31.660 --> 00:14:38.480

Jamie Webster

So we want to download that so we can either click on the row and download, or we can just click on the file name itself.

00:14:42.030 --> 00:15:07.380

Jamie Webster

And it's downloaded that for us the error port again is the same as the one you'd see on the old application. So for each row of data that failed a rule, it's going to copy all the contents of that row into the error report, and it's going to highlight the piece of data that failed the rule. It's only going to do it for the Rose that fail validation, so you can see the Goodrow is not mentioned here.

00:15:08.220 --> 00:15:24.070

Jamie Webster

Uh, so populated the the problem is this three and it's not a valid combination. So do you want to three is not valid, so we need to fix that. There is a second sheet wherever you've got lots of the same type of errors on fields it's going to group them together for you.

00:15:26.630 --> 00:15:30.170

Jamie Webster

So we want to fix this data and resubmit the data.

00:15:31.280 --> 00:16:01.520

Jamie Webster

Uh, if we kind of got two options here because it's one that we've just kind of downloaded and been working on, uh, I could open up the file that's in my downloads, make the change, and upload that, UM, but if some time has passed or you've kind of forgotten about this document or yeah, downloads is very full or something like that, you might want to re download the document and change that and that can lead to a slight issue with the application in a certain path, so I'm going to demonstrate what that looks like, so I'm going to.

00:16:02.200 --> 00:16:05.880

Jamie Webster

Re download this document now, this time I run a quick errand. Click download.

00:16:28.610 --> 00:16:47.420

Jamie Webster

And you'll see that what Windows does is because we already had a file with this name and I'll download folder. It's added this little brackets one at the end, or if we already had a brackets one, it would add brackets too. So it's going to build up that kind of version number over time in your local folder.

00:16:48.090 --> 00:17:04.380

Jamie Webster

And this can present an issue if we try to upload the document using the generic upload document functionality. So I'll show that the first thing I want to do is correct the data. So V13 we want to change to a V. 118. So it's science.

00:17:05.740 --> 00:17:07.120

Jamie Webster

This will now be good data.

00:17:08.280 --> 00:17:09.080

Jamie Webster

I'm gonna save that.

00:17:11.460 --> 00:17:17.550

Jamie Webster

And I don't wanna upload this document back and I'm sorry if I tried to use the upload document button.

00:17:18.710 --> 00:17:26.570

Jamie Webster

This can be used for data collection documents, or it could be used for the other types of documents. You might want to share and we're going to show that later on in this video.

00:17:27.300 --> 00:17:31.860

Jamie Webster

So when I leave this as data collection document and if I wanted to pick this file.

00:17:33.080 --> 00:17:59.920

Jamie Webster

Uh, it's going to present me with a warning so it knows that this ends in one of these kind of Windows version numbers. And if you're using this upload document functionality, the file name needs to match exactly, otherwise it won't know which one to update, so this is going to present an issue, so that's why it's warning us. So we need to resolve this before we proceed, so it's kind of a few option to would you could have.

00:18:02.320 --> 00:18:14.140

Jamie Webster

We could in our downloads folder or wherever we've got the document, we could delete the original that had the the good name and we could rename this one to remove the brackets one once that's gone.

00:18:15.090 --> 00:18:41.280

Jamie Webster

We could move our latest one to a different folder, so somewhere else on your computer and then you'd be allowed to rename it to remove the extra part fix. It would be kind of unique in that folder and the other option maybe don't change anything about the file is instead to find the row that

you're trying to update so we could search to find it. If it's lower down or often it will be near the top because it'll be one that's recently been modified.

00:18:44.620 --> 00:18:55.890

Jamie Webster

And if we use this functionality to upload it, because we're already going in and telling it this is the road that I wanna update the file names don't need to match, so we're able to pick the one with the one at the end.

00:18:56.700 --> 00:18:59.290

Jamie Webster

And if we go this way and it's gonna work.

00:19:01.160 --> 00:19:07.430

Jamie Webster

So I say we get a message so that works and it's gone to draft state, so it's now got our latest data in.

00:19:08.240 --> 00:19:24.430

Jamie Webster

We click on the row and see the version history. We can see how this is building up over time, so we had our first draft week failed validation. We have now uploaded a second one. Clicking on any of these rows would be able to go back and see what was the data like at this point.

00:19:25.010 --> 00:19:26.150

Jamie Webster

So we can download.

00:19:27.910 --> 00:19:30.120

Jamie Webster

I don't see that this was when we had the bad combination.

00:19:30.980 --> 00:19:32.920

Jamie Webster

But the latest ones got the good combination.

00:19:33.790 --> 00:19:41.420

Jamie Webster

And now I want to submit this data so I wanna see if it passes validation and then that's the data that TC would use it. So right click on the row.

00:19:42.630 --> 00:19:50.040

Jamie Webster

And click submit again. It's not caught and many rows of data and just two rows, so it's gonna try to process as a meat immediately.

00:19:52.940 --> 00:20:06.700

Jamie Webster

So we can see that the documents gone to submitted, so this time it's past the validation rules and we get a message at the top to say that that worked. So at this point you know this is the data that TC would use and this is going to flow into other applications.

00:20:07.780 --> 00:20:19.180

Jamie Webster

Because it's now in a submitted state, uh, we don't have the option to upload a draft anymore, so we can't change this data until somebody from the TC asks us to change it.

00:20:21.190 --> 00:20:30.230

Jamie Webster

So that was a small file downloading it, putting some data and uploading into the system and trying to pass validation. We're now going to do.

00:20:30.980 --> 00:20:35.980

Jamie Webster

I large file so I phase three file and.

00:20:37.450 --> 00:20:39.340

Jamie Webster

Show what it's like when there's.

00:20:40.150 --> 00:20:40.770

Jamie Webster

More data.

00:20:42.110 --> 00:20:46.700

Jamie Webster

So I've got fees free blank spreadsheet here. I'm gonna download this.

00:20:48.240 --> 00:21:08.180

Jamie Webster

Anything to do with the fees? Freefall in general always takes slightly longer using the application from the spreadsheet itself as the formulas and the drop down menus. Things like that dragged along way down. So it means just the even that empty spreadsheet is quite large, so things like the virus scans any interactions with it. Just always take a little bit longer.

00:21:10.150 --> 00:21:12.290

Jamie Webster

So that's been scanned and downloaded.

00:21:24.900 --> 00:21:27.770

Jamie Webster

Cool, so again we're gonna click enable editing.

00:21:28.440 --> 00:21:29.600

Jamie Webster

So that we can add data.

00:21:36.950 --> 00:21:38.520

Jamie Webster

And I've got a file.

00:21:40.360 --> 00:21:42.790

Jamie Webster

With that data and say you don't.

00:21:43.760 --> 00:21:45.980

Jamie Webster

Wanna see any type out 21,000 rows?

00:21:48.900 --> 00:21:50.510

Jamie Webster

So we're just gonna copy this data.

00:21:57.380 --> 00:22:00.510

Jamie Webster

In here, we're going to save it locally to our computer.

00:22:06.900 --> 00:22:07.660

Jamie Webster

And then.

00:22:09.150 --> 00:22:20.350

Jamie Webster

That will stay all day and now we wanna upload that document that we just added the data into into the into the application. Right click upload document. I'll share adding it this way this time.

00:22:21.850 --> 00:22:23.030

Jamie Webster

Gonna choose the file.

00:22:24.670 --> 00:22:28.300

Jamie Webster

So it's this latest one, though I just added data to click open.

00:22:29.450 --> 00:22:31.480

Jamie Webster

And click upload draft.

00:22:33.230 --> 00:22:43.100

Jamie Webster

Uh, so currently it's kind of scanning that file to check that it's OK. It's going to find the matching record, so it's going to use the filename to find the matching record.

00:22:43.770 --> 00:22:45.440

Jamie Webster

Uh, and then it's gonna be.

00:22:47.310 --> 00:22:50.620

Jamie Webster

Adding that file to our storage and updating the database.

00:23:10.170 --> 00:23:30.290

Jamie Webster

So we get a message to say that that has worked. One thing that often happens when you use this method of uploading document is that the grid here that you see that won't get updated until you hit refresh. So the process that kind of puts data into this grid and the thing that shows it back out to your browser.

00:23:32.000 --> 00:23:47.390

Jamie Webster

They can sometimes get a little bit out of sync when use this button, so we just want to hit this refresh button here so you see it looks the same as the kind of Chrome refresh icon. Using this it's just going to refresh the data in this grid rather than the whole page, so it's a bit quicker if we just click this button.

00:23:48.550 --> 00:24:01.470

Jamie Webster

So if you've done some action through upload document or some other thing, and you're not seeing it kind of show at the top as the most recently updated item. Just remember to hit that refresh button to.

00:24:02.660 --> 00:24:30.270

Jamie Webster

Uh, so we've now put our document. That's got 21,000 rows into the application. So we're gonna want to click on this row and click submit this time because there's lots of rows of data it is going to go to a queue and it is going to be processed kind of on the back end away from us. So we're not going to get locked out of using the application, but we are going to have to come back and check whether it passed or failed after a few minutes. I'm going to click submit.

00:24:33.080 --> 00:24:36.780

Jamie Webster

So at the moment it's kind of adding this item to the queue to be processed.

00:24:38.030 --> 00:24:44.960

Jamie Webster

Now we can say instead of saying we're it's failed or passed, it's gone to pending validation, so this is more similar to how the current application would work.

00:24:46.630 --> 00:24:51.580

Jamie Webster

Just gonna show us around some of the other screens while we're waiting for this to validate.

00:24:52.590 --> 00:25:10.980

Jamie Webster

Uh, so we've got the archives screen, so any documents that aren't a data collection document so things that other document, strategic intent documents? Uh, once they reach a certain age, a few months old, they're going to move to this other view, so it just keeps that first view of it cleaner.

00:25:11.670 --> 00:25:24.760

Jamie Webster

Uh, this view works kind of exactly the same, so we've got the same paging. It's going to be sorted by the most recently modified at the top, and you're going to be able to click on any column to sort it as well.

00:25:26.110 --> 00:25:31.460

Jamie Webster

And you can search to find documents. So if I just wanted to see.

00:25:32.580 --> 00:25:40.680

Jamie Webster

That kind of documents from 2016 or some year I'm able to click here, click search and it's just going to show me those documents.

00:25:41.910 --> 00:25:45.590

Jamie Webster

Again, all of these files will be migrated from the existing application.

00:25:46.550 --> 00:26:00.510

Jamie Webster

Uh, we gotta terms of use page up so this has been updated. Just had some most recent stuff about ASL, how this application uses cookies and it's also got the most recent privacy contact information there.

00:26:03.590 --> 00:26:19.630

Jamie Webster

The other functionality we can do from this page that we haven't seen yet is how to upload a document that's maybe a Word document or a PDF, but some other file that you want to share with TC. So to do that, we've clicked on upload document from this screen.

00:26:20.630 --> 00:26:40.920

Jamie Webster

And then we click on the type of document we want. So maybe it's some other document. When I select one of these two, I get an additional couple of dropdowns so I could specify the fund and the funding year. These aren't mandatory, so you don't have to pick one. You don't have to select them for data collection document because we already know which funded year it applies for.

00:26:42.520 --> 00:26:55.000

Jamie Webster

So this is how you would add a file like a plan document. So I just got a PDF file here I'm going to select, click open, so let's pick that file. We then click upload. It's going to do a scan of that document.

00:26:56.560 --> 00:27:05.570

Jamie Webster

And we can see there it says that it worked again. We've gone this way. It says that it's worked, but it's not displayed at the top yet. So we just need to hit this refresh button.

00:27:06.980 --> 00:27:14.160

Jamie Webster

Now I can see now that that plan document has appeared at the top, so now people from TC would be able to see it too.

00:27:15.240 --> 00:27:40.490

Jamie Webster

For documents that you've uploaded into the application using this button, so something like a PDF or Word document, you have the option to delete it. So if there's something you've shared by accident that you don't want to be there, you see for this row and I click on it, I get the option to delete. But for the data collection, documents or documents that TC shared with you, that option is not available.

00:27:41.110 --> 00:27:49.080

Jamie Webster

Ah, so you just have to click on the row and then click delete. You'll get a little prompt just to make sure that you do want to do it and you click OK.

00:27:51.530 --> 00:27:54.920

Jamie Webster

How you got little message at the top to say that yes, that has worked.

00:28:04.540 --> 00:28:07.940

Jamie Webster

Coke just waiting on this document to complete processing.

00:28:11.990 --> 00:28:29.920

Jamie Webster

And we can see here that it's gone too submitted. So that's passed validation. UM, if you're on the verge in history, kind of see. Yeah it took just under 4 minutes, so we have done quite a bit of performance testing around the fees free files, and it's something we'll be monitoring closely after go live.

00:28:31.140 --> 00:28:39.670

Jamie Webster

So these two documents that are in a submitted state, as I said, we're not able to upload or change these documents. They're kind of sitting with TC to take a look at.

00:28:40.600 --> 00:28:45.450

Jamie Webster

Just to show you how that process works and what they look like when we come back, we're just going to log in.

00:28:46.160 --> 00:28:47.920

Jamie Webster

As a TC person.

00:28:48.630 --> 00:28:50.100

Jamie Webster

So when I look out the application.

00:28:52.850 --> 00:28:54.860

Jamie Webster

Log in as someone from TC.

00:29:00.080 --> 00:29:03.200

Jamie Webster

Navigate to that. Provide us page.

00:29:06.230 --> 00:29:37.280

Jamie Webster

And what they would be able to do is like and download this document. Take a look at it and then ultimately they can change the status if they want to show whether they're happy with it or whether it needs to be changed. And so we run option here and to set it to a revised status. So when it goes to revise, this means they want the TO to change the data they are able to leave a comment here just to prompt them on wife today and needs to be changed. Or the communications still go through the main.

00:29:37.330 --> 00:29:40.720

Jamie Webster

Channels this is just an additional way that they can put it in as a record.

00:29:42.450 --> 00:29:46.020

Jamie Webster

Now we're just gonna add one just to show how you would see it for the user interface.

00:29:54.040 --> 00:29:57.050

Jamie Webster

And for the second one will also change the status to revise.

00:30:04.080 --> 00:30:07.110

Jamie Webster

Then when I log out now as the user.

00:30:08.990 --> 00:30:09.960

Jamie Webster

And login.

00:30:10.690 --> 00:30:12.150

Jamie Webster

As the PTO again.

00:30:21.820 --> 00:30:23.650

Jamie Webster

And then navigate to my documents.

00:30:26.380 --> 00:30:39.830

Jamie Webster

And you can see that these two documents have gone to a revised date. That means when we click on the row, we are able to upload a draft again, so I'd be able to upload it afterward. The corrected or changed data, and we'd be able to. Once that's been done, submit it.

00:30:41.210 --> 00:30:42.480

Jamie Webster

In the version history.

00:30:43.890 --> 00:30:47.650

Jamie Webster

But that's where we can see this comment that's being left.

00:30:50.230 --> 00:31:20.310

Jamie Webster

OK, that brings us to the end of this session, so showed how to log into the application on the home page we showed the notices and the shared documents. We then showed how to download some data collection documents, how to upload them into the system, or what happens when you submit them out for a large file and a small file. Alder validation Error report works. How to add a different type of document like a plan document and we've looked at the.

00:31:20.360 --> 00:31:20.980

Jamie Webster

I'll copy it.

00:31:22.100 --> 00:31:22.540

Jamie Webster

Thank you.