

# Taskize onboarding guide

| 5 steps to help you get  
started right away





## **| Welcome to Taskize**

Taskize's award-winning collaboration platform minimises risk, improves client service and increases operational capacity.

Interoperable and web based, Taskize is used across securities settlements, corporate actions, and collateral management. Taskize is built around four key features:



You can use Taskize to:

- Resolve margin disputes
- Appeal CSDR penalties
- Reconcile cash credit
- Resolve unmatched trades
- And much more...

If you haven't already, finish setting up your account by creating your password by following the instructions in your welcome email.



# 1. Everything starts with a Bubble

To resolve issues with Taskize you need to raise or respond to Bubbles. Bubbles are secure spaces (like issue tickets) with built in workflow technology that enable you to quickly collaborate with your counterparties internally, and across the Taskize network.

You can also use Bubble templates for queries you raise regularly to save time, and you can include attachments for counterparties too.

Creating a Bubble is simple...

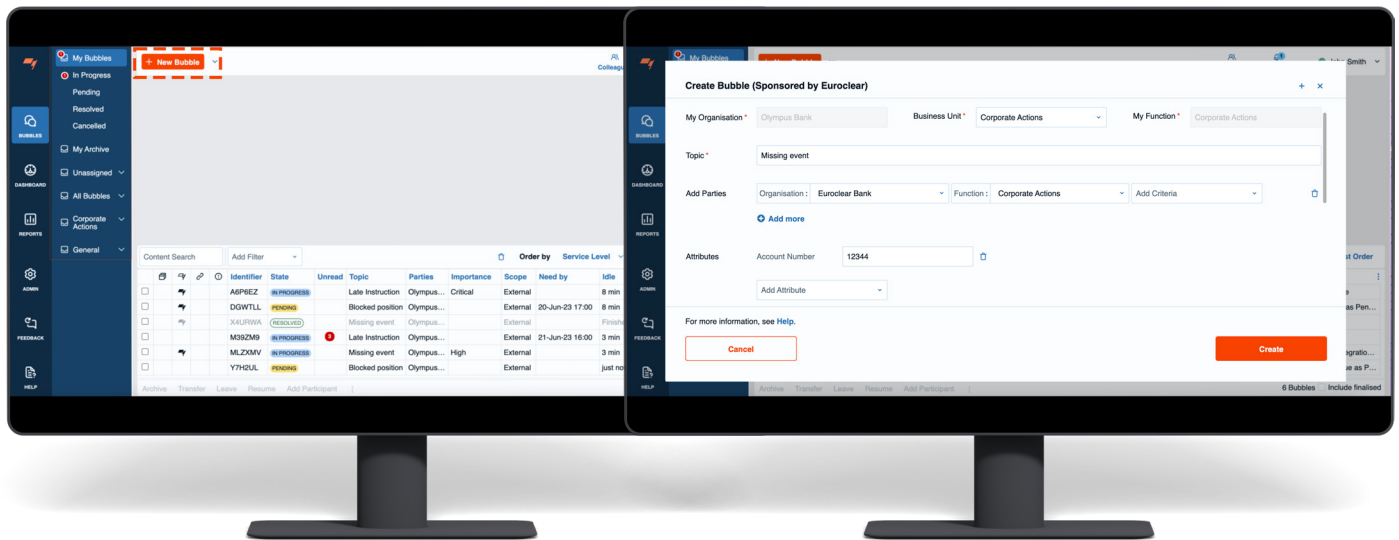


Bubbles remove the pain of managing long and complicated email threads, and our surveys show they provide better client satisfaction than both phone and email comms. You can keep all relevant messages and documents in one place, so nothing gets lost, and a clear audit trail is automatically generated.

[Learn more about Bubbles](#)

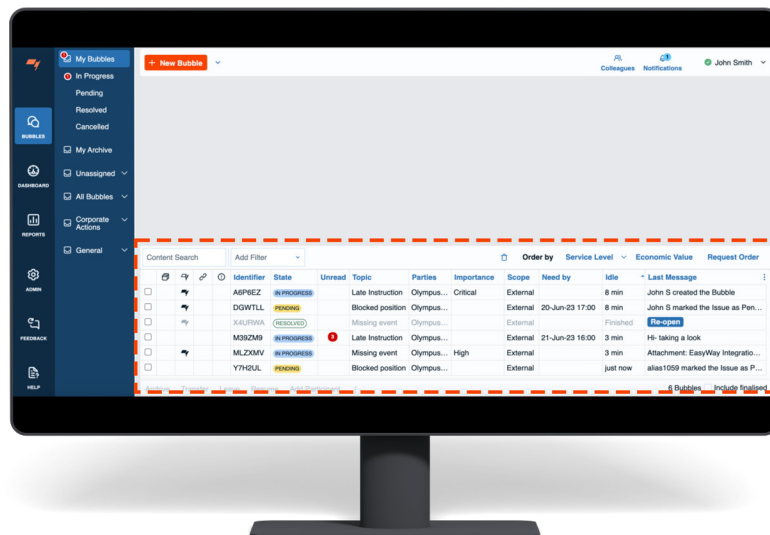


## 2. Raising a Bubble



To raise a Bubble on Taskize simply:

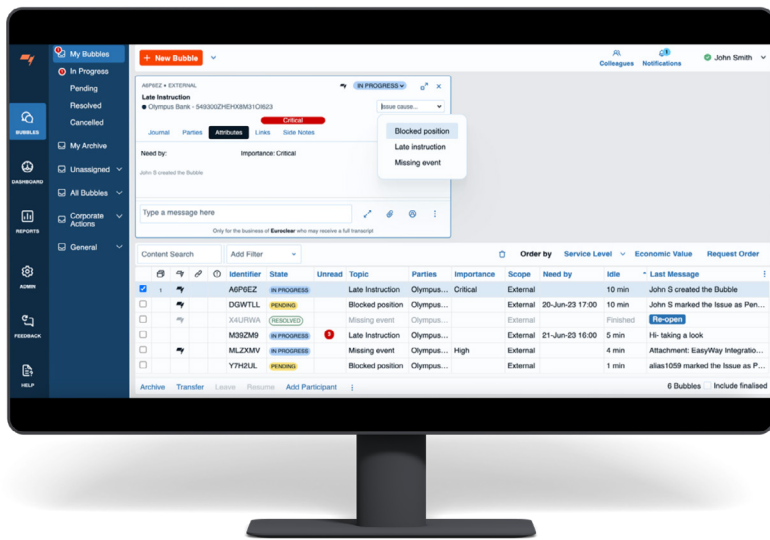
1. Create a Bubble
2. Invite someone to join it
3. Add the relevant function, for example, Corporate Actions
4. After you've filled out all the other relevant fields in the Bubble, click **Create**



All the Bubbles you are working on will appear on your **Bubble blotter** (highlighted above). It provides you with an overview of all open Bubbles, allowing you to prioritise your workload, identify and escalate urgent issues and manage your workload more effectively.

Learn more about the Bubble blotter





Once you've resolved a Bubble, select the issue cause from the dropdown menu. The platform gathers this info to provide management information and enable root cause analysis.

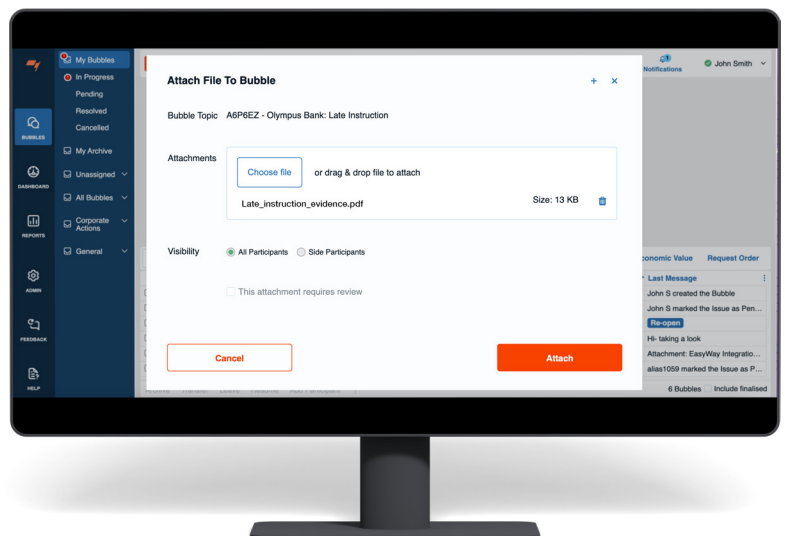
Learn more about issue cause



### 3. Making the most out of attachments

Taskize Bubbles can include attachments up to 200MB, and they can be sent internally and externally. File types supported include:

- Images
- Text files
- Microsoft Office documents
- Email messages
- PDF files
- XML files
- Compressed files



1. When creating a Bubble, you can drag and drop the attachment or select **Choose file**
2. After you've filled out all the other relevant fields in the Bubble, click **Create**



Depending on your organisations' settings, when you upload an attachment, you can track who has viewed and/or downloaded it.

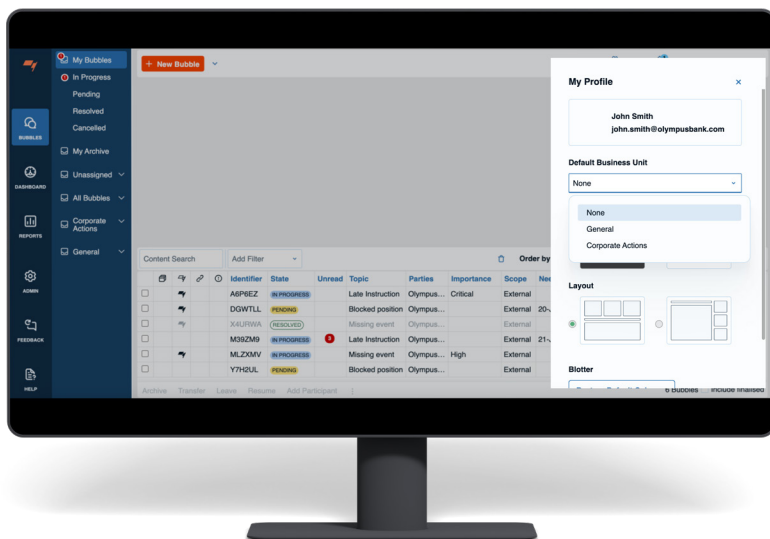
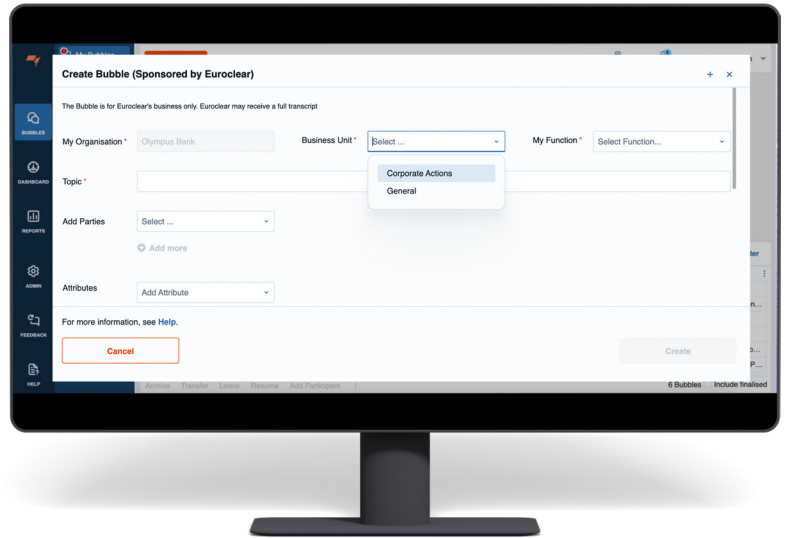
You can also set up a 'four eyes check' which allows an approver to review the attachment before others in the Bubble can view it. Automatic version control is available for all attachments so you can easily track any changes.

## 4. Working with business units

When you join the Taskize platform, your administrator should assign you to one or more business units.

This makes it easier for you to view and manage Bubbles relevant to you. By using business units, Taskize can also provide your organisation with more insightful and valuable statistics and reporting.

If you are a member of more than one business unit, **you will need to select the relevant business unit** when creating a new Bubble.



To set a default business unit:

1. Click on the arrow next to your name
2. Select **My profile**
3. Select your preferred default business unit from the drop-down menu

Learn more about business units



# 5. Understanding the icons

## My Bubbles

View your assigned Bubbles

## Unassigned

View unassigned Bubbles

## All Bubbles

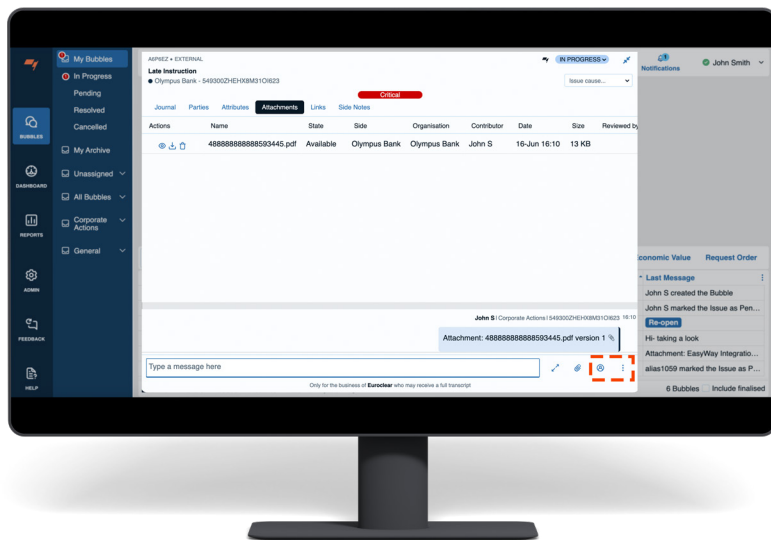
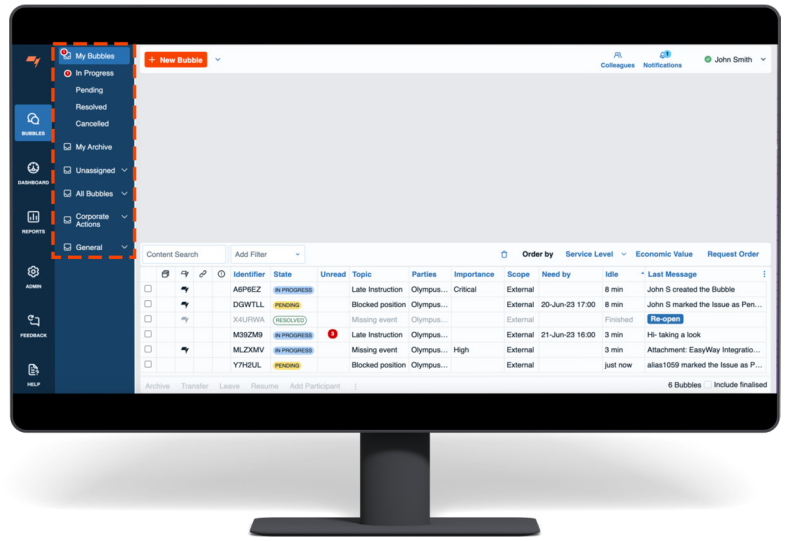
View all Bubbles assigned to your business unit

## Business unit

View all Bubbles assigned to any business unit you are a member of

## Colleagues

Check your colleagues' status and add them to existing Bubbles



## Bubble context menu

This menu allows you to do a variety of things, for example, transfer a Bubble, remove a participant, or create a linked Bubble

## Add participant

Add people to the Bubble

Learn more about Taskize



## I FAQs

### How do I find out who my admin is?

Raise a Bubble with Taskize support and we'll let you know.

### Which firms are on the Taskize network?

You can find out who's on the network [here](#).

### Do I need to download an app?

No, Taskize is a web-based platform.

## I Contacting support

The best way to contact Taskize support is to raise a Bubble with us. If you can't access

