

Task Menu
Release 14.3.0.0.0

Part No. F18790-01

May 2019

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Task Menu

Task menu has multiple sub menus. Based on the user role, the sub menus can be accessed by the user. Task Menu has the following sub menus:

- Completed Tasks
- Free Tasks
- Hold Tasks
- My Tasks
- Search

In the following sections, let's look at the details of each sub menus.

This section contains the following topics:

Completed Tasks	Free Tasks
Hold Tasks	My Tasks
Search	

Completed Tasks

Completed Tasks menu displays the tasks which has recently completed a stage in a process by the current user. This menu does not displays completed tasks of all the stages but displays only the latest stage. The task list will display the following details of the task:

- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Completed Tasks

Refresh Flow Diagram

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	GS1ELCLI0024250	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCLI0024250	GS1	000262	£18,000.00	Export LC Liquidation	Registration
M	GS1ELCLI0024233	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCLI0024233	GS1	000262	£15,000.00	Export LC Liquidation	Registration
M	GS1ELCDR0024204	GS1	000262	£15,000.00	Export LC Drawing	Data Enrichment
M	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

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Following actions can be performed on the Completed Tasks menu:

- Flow Diagram - Completed Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

Completed Tasks

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Refresh Flow Diagram

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	GS1ELCLI0024250	GS1	000262	£0.00	Export LC Liquidation	Liquidation
M	GS1ELCLI0024250	GS1	000262	£18,000.00	Export LC Liquidation	Registration
M	GS1ELCLI0024233	GS1	000262	£0.00	Export LC Liquidation	Liquidation
M	GS1ELCLI0024233	GS1	000262	£15,000.00	Export LC Liquidation	Registration
M	GS1ELCDR0024204	GS1	000262	£15,000.00	Export LC Drawing	Data Enrichment
M	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

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Free Tasks

Free Tasks menu will display the tasks which were not acquired by any user and for which the current user is entitled to access. The task list will display the following details of the task:

- Action
- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Following action can be performed on the Free Tasks menu:

- Acquire & Edit - Click **Acquire & Edit** to acquire the task and edit directly from free tasks menu.

- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.

Free Tasks

Refresh Acquire Delegate Reassign Flow Diagram

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
Acquire & Edit	M	GS1ELCLJ0024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval

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- Flow Diagram - Free Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

Free Tasks

Refresh Acquire Delegate Reassign Flow Diagram

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCLJ0024400	GS1	000262	£29,000.00	Export LC Liquidation	Liquidation
Acquire & Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval
Acquire & Edit		GS1ILCDR0024318	GS1	000262	£11,000.00	Import LC Drawing	Approval1

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- Reassign- Click **Reassign** to the task to sub-ordinates. This action can be performed only if user is provided with the assignment rights.

Free Tasks

Refresh Acquire Delegate Reassign Flow Diagram

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCDR0024410	GS1	000262	£2,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
Acquire & Edit	M	GS1ELCLJ0024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval

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Hold Tasks

Hold Tasks menu displays the tasks which were moved on hold by the current user. The task list will display the following details of the task:

- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Following action can be performed on the Hold Tasks menu:

- Resume - Select the task and click **Resume** to move the task to **My Tasks** menu and edit.

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	203ILCI000003665	093	001345	£1,200.00	Import LC	Data Enrichment

- Flow Diagram - Hold Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	203ILCI000003665	093	001345	£1,200.00	Import LC	Data Enrichment

My Tasks

My Tasks menu displays the tasks acquired from the free tasks menu by the current user. The task list will display the following details of the task:

- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Following action can be performed on the My Tasks menu:

- Edit - Click **Edit** to edit the selected task.
- Release - Click **Release** to release the selected task from **My Tasks** to **Free Tasks** menu.

The screenshot shows the 'My Tasks' interface in the FuTura Bank system. The interface includes a sidebar menu on the left with options like 'Core Maintenance', 'Corporate Lending', 'Dashboard', 'Maintenance', 'Security Management', 'Tasks', 'Trade Finance', and 'Virtual Account Manage...'. The main content area displays a table of tasks with columns: Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. Two tasks are listed: one with Application Number GS1ELCDR0024396 and another with GS1ELCDR0024391. The 'Edit' button in the first row and the 'Release' button above the table are highlighted with red boxes. Below the table, there is a pagination control showing 'Page 1 of 1 (1-2 of 2 items)' and '1 - 2 of 2 records'.

- Refresh - Click Refresh to refresh the task list.
- Flow Diagram - My Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.

This screenshot is similar to the previous one, showing the 'My Tasks' interface. In this view, the 'Refresh' button and the 'Flow Diagram' button above the table are highlighted with red boxes. The table and pagination controls remain the same as in the previous screenshot.

- Delegate - Click Delegate to assign the acquired task to any valid user for processing within the group.

Search

Search menu enables the user to search for the task(s) with the following filters. Search will fetch the results either will one filter criteria or with multiple filter criteria.

- Application Number

- Customer Name
- Branch Name
- Tasks
- Priority
- Process and Stage
- Entity Type
- Amount

The screenshot shows the FuTura Bank interface. On the left is a navigation menu with options like Core Maintenance, Maintenance, Tasks, Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search, Supervisor Tasks, and Trade Finance. The main area is titled 'Search' and contains a 'Filters' section with a 'Clear Filters' button. Below the filters are several input fields: Application Number (dropdown), Customer Name (text with search icon), Branch Name (dropdown), Tasks (checkbox), Priority (checkbox), Process (checkbox), Entity Type (text), and Amount (checkbox). To the right of the filters is a 'Task List' table with 8 rows. Each row contains an application number, a status (NA), an amount, and a description of the task's state. Each row also has a menu icon on the right.

Application Number	Status	Amount	Description	Actions
001346 203ILCI000003721	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	⋮
093001401 093ILCA000003720	NA Approval2 AIB Dublin	\$150,000.00	The Task is in Free State	⋮
001346 203ILCI000003689	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	⋮
093001401 093ILCA000003688	NA Retry HandOff AIB Dublin	\$100,000.00	The Task is in Free State	⋮
093001401 093ILCA000003687	NA Retry HandOff AIB Dublin	\$100,000.00	The Task is in Free State	⋮
093001401 093ILCA000003686	NA Retry HandOff AIB Dublin	\$150,000.00	The Task is in Free State	⋮
093001401 093ILCA000003684	NA Retry HandOff AIB Dublin	\$150,000.00	The Task is in Free State	⋮
093001401 093ILCA000003683	NA Retry HandOff AIB Dublin	\$150,000.00	The Task is in Free State	⋮

Following actions can be preformed on the tasks listed in the task list:

- Acquire - Click Acquire to acquire the task.

- Flow Diagram - enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.

The screenshot displays the FuTura Bank application interface. On the left is a dark sidebar with navigation options: Core Maintenance, Maintenance, Tasks (selected), Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search, Supervisor Tasks, and Trade Finance. The main content area has a search bar and a filters section with 'Clear Filters' button. Below filters are input fields for Application Number, Customer Name, and Branch Name (set to 'Bank Futura -Branch FZ1'). A 'Tasks' section has radio buttons for 'My Tasks', 'Free Tasks' (selected), 'Hold Tasks', and 'All Tasks'. A 'Priority' section is partially visible.

The 'Task List' table contains the following data:

Application Number	Category	Amount	Status	Action
001346 203ILCI000003721	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	Acquire, FlowDiagram
001346 203ILCI000003689	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	
001345 203ILCI000003678	NA Registration Bank Futura -Branch FZ1	£1,000.00	The Task is in Free State	
001346 203ILCI000003670	NA Registration Bank Futura -Branch FZ1	£10,000.00	The Task is in Free State	
001344 203GTEI000003667	NA Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	
001344 203GTEI000003666	NA Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	

A red box highlights the 'Acquire' and 'FlowDiagram' options in the menu for the first task row.

C

Completed Tasks 4

F

Free Tasks 5

H

Hold Tasks 7

M

My Tasks 8

S

Search 8

T

Task Menu 4

 Completed Tasks 4

 Free Tasks 5

 Hold Tasks 7

 My Tasks 8

 Search 8

References

For more information on any related features, you can refer to the following documents:

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

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