

Task Menu
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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.

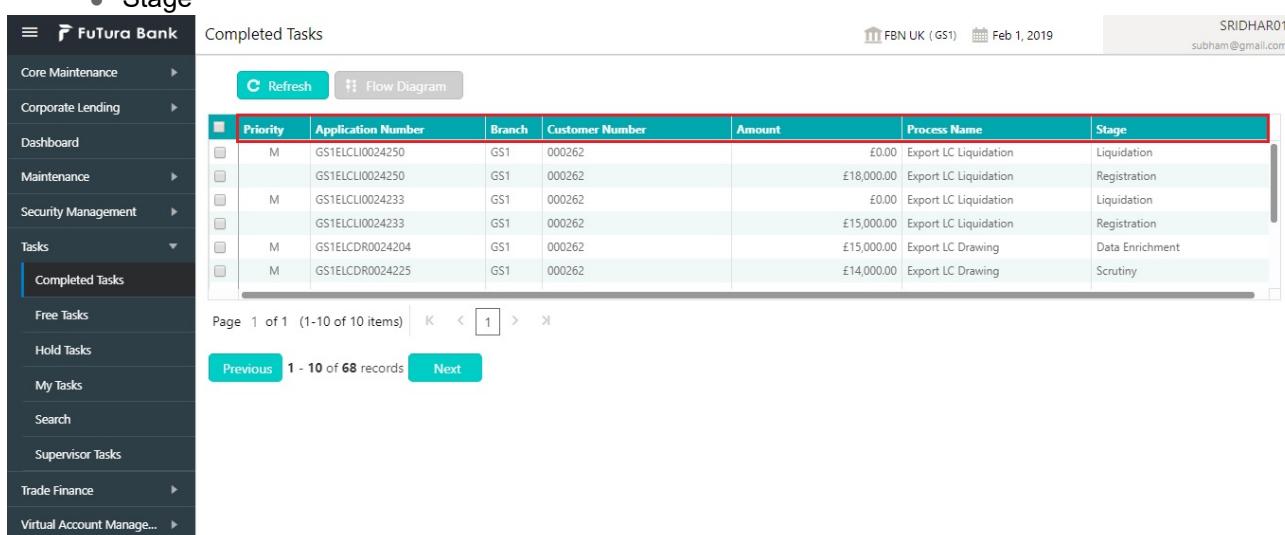
This section contains the following topics:

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



The screenshot shows the 'Completed Tasks' page of the Futura Bank application. The left sidebar has a 'Completed Tasks' link under the 'Tasks' section. The main content area has a 'Completed Tasks' header and a table with columns: Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. The table contains 6 rows of data. At the bottom, there are navigation buttons for 'Previous', '1 - 10 of 68 records', and 'Next'.

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
	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

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.

Futura Bank

Completed Tasks

FBN UK (GS1) Feb 1, 2019

SRIDHAR01
subham@gmail.com

Core Maintenance

Corporate Lending

Dashboard

Maintenance

Security Management

Tasks

Completed Tasks

Free Tasks

Hold Tasks

My Tasks

Search

Supervisor Tasks

Trade Finance

Virtual Account Manage...

C Refresh **Flow Diagram**

	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/>	M	GS1ELCLI0024250	GS1	000262	£0.00	Export LC Liquidation	Liquidation
<input type="checkbox"/>	M	GS1ELCLI0024250	GS1	000262	£18,000.00	Export LC Liquidation	Registration
<input type="checkbox"/>	M	GS1ELCLI0024233	GS1	000262	£0.00	Export LC Liquidation	Liquidation
<input type="checkbox"/>	M	GS1ELCLI0024233	GS1	000262	£15,000.00	Export LC Liquidation	Registration
<input type="checkbox"/>	M	GS1ELCDR0024204	GS1	000262	£15,000.00	Export LC Drawing	Data Enrichment
<input type="checkbox"/>	M	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

Page 1 of 1 (1-10 of 10 items) **K** < **1** > **X**

Previous 1 - 10 of 68 records **Next**

Free Tasks

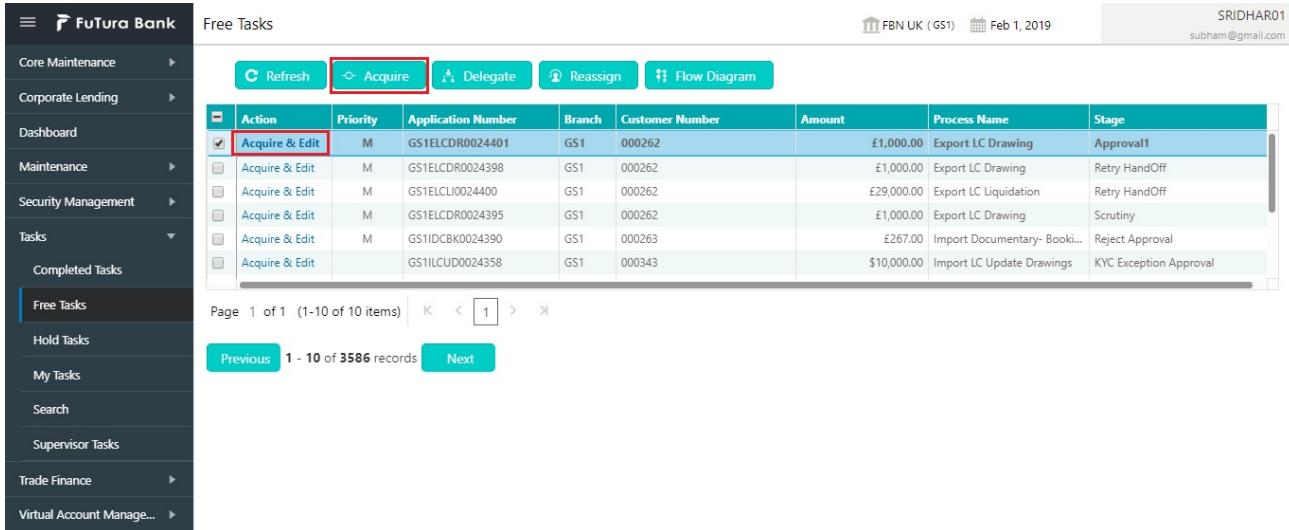
Free Tasks menu will display the tasks which were not acquired by any user and for which the current user is entitled to access. The task list will display the following details of the task:

- 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.

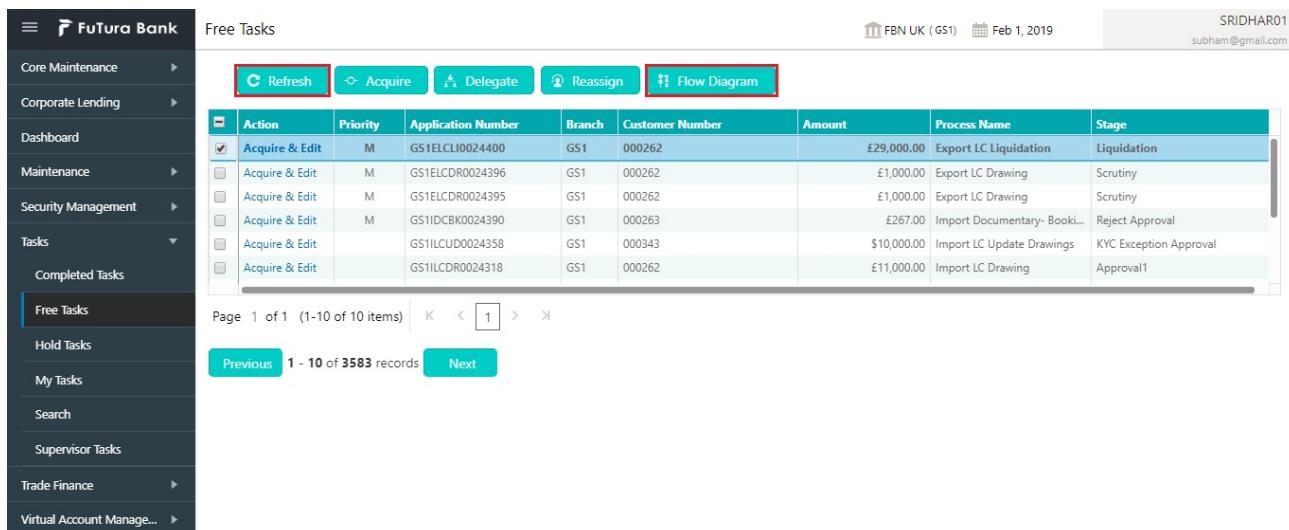
- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.



The screenshot shows the 'Free Tasks' page of the Futura Bank application. The 'Acquire' button is highlighted with a red box. The table below lists various tasks with columns for Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. One task is selected, and its details are shown in the table.

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	GS1ELCDR0024400	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- Book...	Reject Approval
Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval

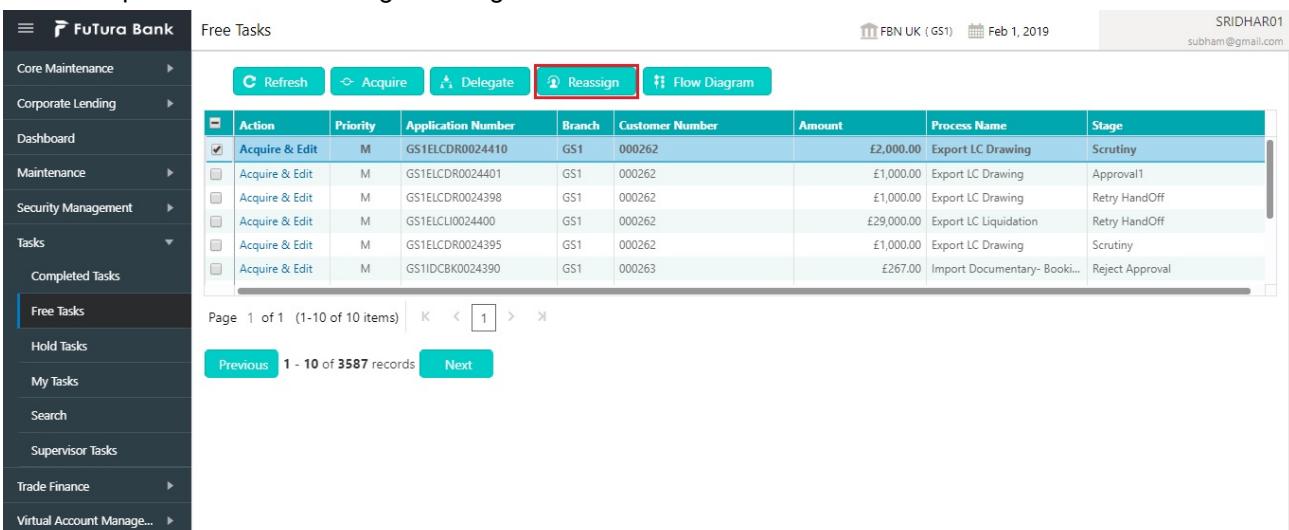
- Flow Diagram - Free Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.



The screenshot shows the 'Free Tasks' page with the 'Flow Diagram' button highlighted with a red box. The table below lists tasks, and the 'Flow Diagram' button is part of the header bar.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCDR0024400	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- Book...	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

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



The screenshot shows the 'Free Tasks' page with the 'Reassign' button highlighted with a red box. The table below lists tasks, and the 'Reassign' button is part of the header bar.

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	GS1ELCDR0024400	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- Book...	Reject Approval

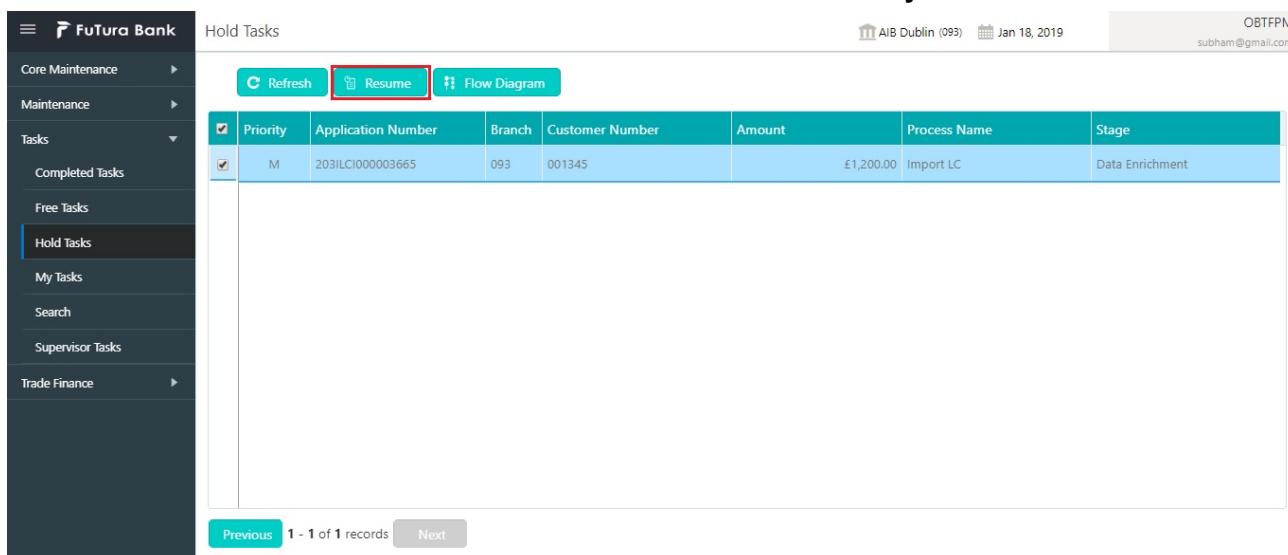
Hold Tasks

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

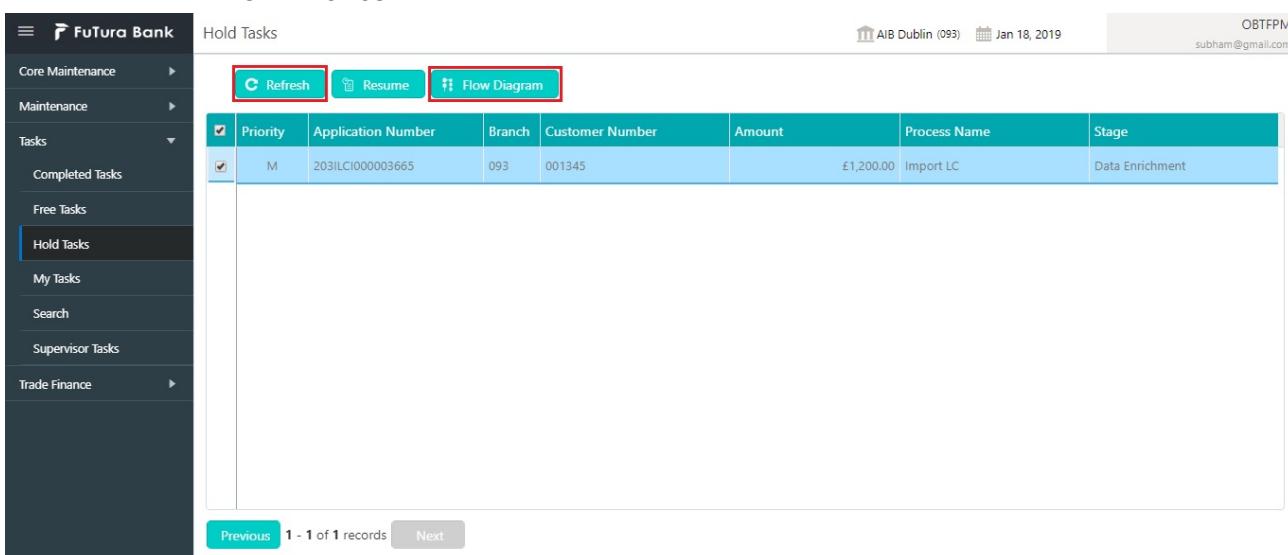
Following action can be performed on the Hold Tasks menu:

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



The screenshot shows the 'Hold Tasks' page of a banking application. The left sidebar has a 'Tasks' section with 'Completed Tasks', 'Free Tasks', 'Hold Tasks' (which is selected and highlighted in blue), 'My Tasks', 'Search', and 'Supervisor Tasks'. The main area is titled 'Hold Tasks' and shows a table with one record. The table columns are: Priority (M), Application Number (203ILCI000003665), Branch (093), Customer Number (001345), Amount (£1,200.00), Process Name (Import LC), and Stage (Data Enrichment). At the top of the table are buttons for 'Refresh', 'Resume' (which is highlighted with a red box), and 'Flow Diagram'. At the bottom are 'Previous' and 'Next' buttons, and a message '1 - 1 of 1 records'.

- 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.



The screenshot shows the 'Hold Tasks' page of a banking application. The left sidebar has a 'Tasks' section with 'Completed Tasks', 'Free Tasks', 'Hold Tasks' (which is selected and highlighted in blue), 'My Tasks', 'Search', and 'Supervisor Tasks'. The main area is titled 'Hold Tasks' and shows a table with one record. The table columns are: Priority (M), Application Number (203ILCI000003665), Branch (093), Customer Number (001345), Amount (£1,200.00), Process Name (Import LC), and Stage (Data Enrichment). At the top of the table are buttons for 'Refresh', 'Resume', and 'Flow Diagram' (which is highlighted with a red box). At the bottom are 'Previous' and 'Next' buttons, and a message '1 - 1 of 1 records'.

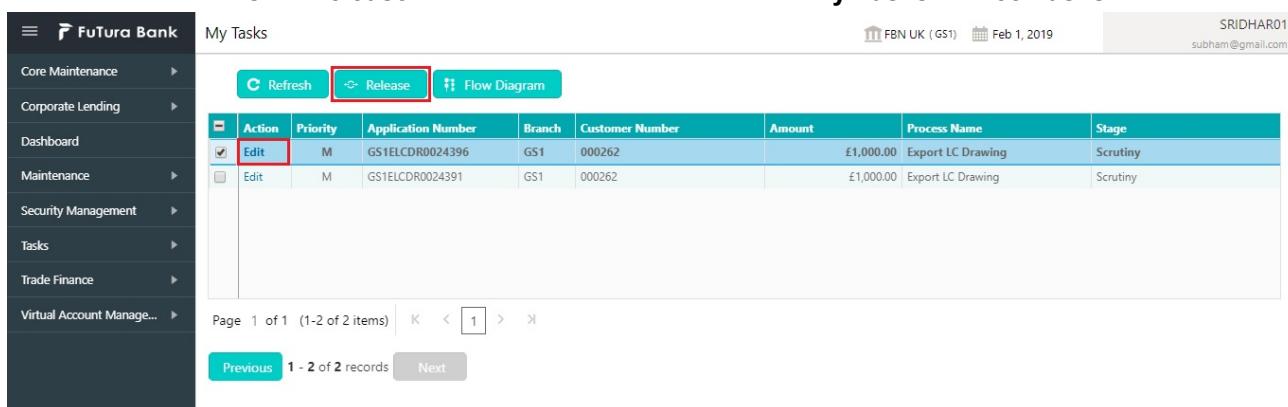
My Tasks

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

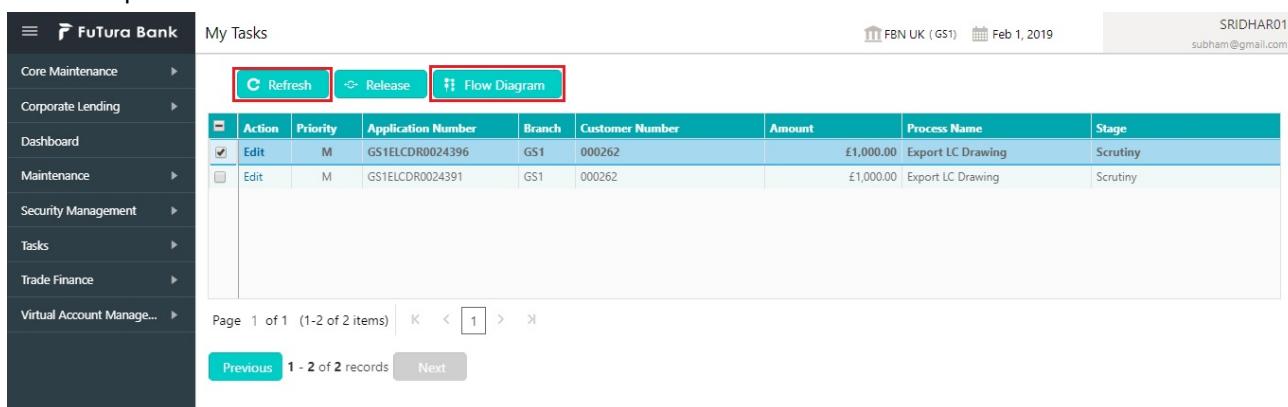
Following action can be performed on the My Tasks menu:

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



Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Edit	M	GS1ELCDR0024391	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny

- 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.



Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Edit	M	GS1ELCDR0024391	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny

- 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 with one filter criteria or with multiple filter criteria.

- Application Number

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

Task List

Application Number	Customer Name	Branch Name	NA	Amount	Task Status
001346	NA	NA	Scrutiny	£1,200.00	The Task is in Free State
203ILC000003721			Bank Futura -Branch FZ1		
093001401	NA	NA	Approval2	\$150,000.00	The Task is in Free State
093ILCA000003720			AIB Dublin		
001346	NA	NA	Scrutiny	£1,200.00	The Task is in Free State
203ILC000003689			Bank Futura -Branch FZ1		
093001401	NA	NA	Retry HandOff	\$100,000.00	The Task is in Free State
093ILCA000003688			AIB Dublin		
093001401	NA	NA	Retry HandOff	\$100,000.00	The Task is in Free State
093ILCA000003687			AIB Dublin		
093001401	NA	NA	Retry HandOff	\$150,000.00	The Task is in Free State
093ILCA000003686			AIB Dublin		
093001401	NA	NA	Retry HandOff	\$150,000.00	The Task is in Free State
093ILCA000003684			AIB Dublin		
093001401	NA	NA	Retry HandOff	\$150,000.00	The Task is in Free State
093ILCA000003683			AIB Dublin		

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 shows the Futura Bank application interface. The sidebar on the left includes links for Core Maintenance, Maintenance, Tasks (selected), Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search (selected), Supervisor Tasks, and Trade Finance. The main area has a search bar and a 'Filters' button. The 'Task List' table has columns for Application Number, Customer Name, Branch Name, Task ID, NA, Amount, and Status. Task 001346 is highlighted with a red box around the 'FlowDiagram' button in the status column.

Task List					
Application Number	Customer Name	Branch Name	Task ID	NA	Amount
Select Application Number		Bank Futura - Branch FZ1	001346	NA Scrutiny Bank Futura - Branch FZ1	£1,200.00
203ILCI000003721			001346	NA Scrutiny Bank Futura - Branch FZ1	£1,200.00
203ILCI000003689			001345	NA Registration Bank Futura - Branch FZ1	£1,000.00
203ILCI000003678			001346	NA Registration Bank Futura - Branch FZ1	£10,000.00
203ILCI000003670			001344	NA Registration Bank Futura - Branch FZ1	£2,000.00
203GTEI000003667			001344	NA Registration Bank Futura - Branch FZ1	£2,000.00
203GTEI000003666					

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Reference and Feedback

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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