

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

FuTura Bank

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...

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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Next

FBN UK (GS1)

Feb 1, 2019

SRIDHAR01
subham@gmail.com

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

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... ▶

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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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.

FuTura Bank Free Tasks FBN UK (GS1) Feb 1, 2019 SRIDHAR01 subham@gmail.com

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	GS1ELCL0024400	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	M	GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval

Page 1 of 1 (1-10 of 10 items) **Previous** 1 - 10 of 3586 records **Next**

- 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.

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Refresh **Acquire** **Delegate** **Reassign** **Flow Diagram**

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
☒ Acquire & Edit	M	GS1ELCL0024400	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	M	GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval
☐ Acquire & Edit	M	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.

FuTura Bank Free Tasks FBN UK (GS1) Feb 1, 2019 SRIDHAR01 subham@gmail.com

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	GS1ELCL0024400	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

Page 1 of 1 (1-10 of 10 items) **Previous** 1 - 10 of 3587 records **Next**

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.

Hold Tasks

Refresh Resume Flow Diagram

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

Previous 1 - 1 of 1 records Next

- 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.

Hold Tasks

Refresh Resume Flow Diagram

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

Previous 1 - 1 of 1 records Next

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 FuTura Bank interface. On the left is a sidebar menu with options like Core Maintenance, Corporate Lending, Dashboard, Maintenance, Security Management, Tasks, Trade Finance, and Virtual Account Manage... The main area is titled 'My Tasks'. At the top right, it shows 'FBN UK (GS1)' and 'Feb 1, 2019'. Below this, there are three buttons: 'Refresh', 'Release', and 'Flow Diagram'. The 'Release' button is highlighted with a red box. Below the buttons is a table with the following columns: Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. The table contains two rows. The first row has a checked checkbox in the Action column, 'Edit' in the Priority column, 'GS1ELCDR0024396' in the Application Number column, 'GS1' in the Branch column, '000262' in the Customer Number column, '£1,000.00' in the Amount column, 'Export LC Drawing' in the Process Name column, and 'Scrutiny' in the Stage column. The second row has an unchecked checkbox in the Action column, 'Edit' in the Priority column, 'GS1ELCDR0024391' in the Application Number column, 'GS1' in the Branch column, '000262' in the Customer Number column, '£1,000.00' in the Amount column, 'Export LC Drawing' in the Process Name column, and 'Scrutiny' in the Stage column. Below the table, there is a pagination bar showing 'Page 1 of 1 (1-2 of 2 items)' and buttons for 'Previous', 'Next', and '1'. The 'Previous' button is highlighted with a red box.

- 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 identical to the one above, showing the FuTura Bank 'My Tasks' menu. In this version, the 'Refresh' button and the 'Flow Diagram' button are highlighted with red boxes instead of the 'Release' button.

- 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
- Amount
- Contract Reference Number
- Other Bank Reference Number



Note

Contract Reference Number and Other Bank Reference Number is applicable only for OBTFPM product.

ORACLE

Search

International Payments-Fas...
Jan 1, 2016

Menu Item Search...

Filters ✕ Clear Filters

Application Number

Select Application Number

Customer Name

Branch Name

Select Branch

✕

Tasks

✕

Priority

✕

Process

✕

Amount

✕

OBTFPM

Task List

000823	Import LC Issuance	£10,000.00	The task is Held by null
000ELCA000031086	KYC Exceptional approval GS1		
001506	Import LC Issuance	£100,000.00	The task is Held by null
300ILCIS001324	DataEnrichment GS1		
001506	Import LC Issuance	£100,000.00	The task is Held by null
300ILCIS001324	Scrutiny GS1		
001506	Import LC Issuance	£100,000.00	The task is Held by null
300ILCIS001324	Registration GS1		
000823	Import LC Issuance	£10,000.00	The task is Held by null
000ELCA000031086	KYC Exceptional approval GS1		
001506	Import LC Issuance	£100,000.00	The task is Held by null
300ILCIS001324	DataEnrichment GS1		
001506	Import LC Issuance	£100,000.00	The task is Held by null
300ILCIS001324	Scrutiny GS1		
000823	Import LC Issuance	£10,000.00	The task is Held by null
000ELCA000031086	KYC Exceptional approval GS1		
000823	Import LC Issuance	£10,000.00	The task is Held by null
	Approval Task Level 1		

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.

FuTura Bank
Search
AIB Dublin (993) Jan 18, 2019
OBTFPM
subham@gmail.com

Core Maintenance

Maintenance

Tasks

Completed Tasks

Free Tasks

Hold Tasks

My Tasks

Search

Supervisor Tasks

Trade Finance

Application Number

Select Application Number

Customer Name

Branch Name

Bank Futura - Branch FZ1

Tasks

☐ My Tasks
☒ Free Tasks
☐ Hold Tasks
☐ All Tasks

Priority

Task List

001346	NA Scrutiny Bank Futura - Branch FZ1	£1,200.00	The Task is in Free State	☰
203ILCI000003721				
001346	NA Scrutiny Bank Futura - Branch FZ1	£1,200.00	The Task is in	☰
203ILCI000003689				
001345	NA Registration Bank Futura - Branch FZ1	£1,000.00	The Task is in Free State	☰
203ILCI000003678				
001346	NA Registration Bank Futura - Branch FZ1	£10,000.00	The Task is in Free State	☰
203ILCI000003670				
001344	NA Registration Bank Futura - Branch FZ1	£2,000.00	The Task is in Free State	☰
203GTEI000003667				
001344	NA Registration Bank Futura - Branch FZ1	£2,000.00	The Task is in Free State	☰
203GTEI000003666				

C

Completed Tasks 1

F

Free Tasks 2

H

Hold Tasks 4

M

My Tasks 5

S

Search 5

T

Task Menu 1

 Completed Tasks 1

 Free Tasks 2

 Hold Tasks 4

 My Tasks 5

 Search 5

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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