

Task Menu

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Contents

- Task Menu 1**
 - Completed Tasks 1
 - Free Tasks 2
 - Hold Tasks 4
 - My Tasks 5
 - Search 5
- Reference and Feedback 9**
 - References 9
 - Documentation Accessibility 9
 - Feedback and Support 9

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' 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', 'Free Tasks', 'Hold Tasks', 'My Tasks', 'Search', 'Supervisor Tasks', 'Trade Finance', and 'Virtual Account Manage...'. The main content area displays a table of completed tasks with columns for Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. The table contains 6 rows of data. Below the table, there is a pagination control showing 'Page 1 of 1 (1-10 of 10 items)' and a 'Previous' button, and another pagination control showing '1 - 10 of 68 records' with 'Previous' and 'Next' buttons. The top right of the interface shows the user's name 'SRIDHAR01' and email 'subham@gmail.com'.

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

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

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

Page 1 of 1 (1-10 of 10 items) | 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 in the FuTura Bank system. The 'Acquire' button is highlighted with a red box. The table below shows a list of tasks with columns for Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
<input type="checkbox"/> Acquire & Edit	M	GS1ELCL0024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
<input type="checkbox"/> 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 in the FuTura Bank system. The 'Refresh' button is highlighted with a red box. The table below shows a list of tasks with columns for Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Acquire & Edit	M	GS1ELCL0024400	GS1	000262	£29,000.00	Export LC Liquidation	Liquidation
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
<input type="checkbox"/> Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval
<input type="checkbox"/> Acquire & Edit		GS1ILCDR0024318	GS1	000262	£11,000.00	Import LC Drawing	Approval1

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

The screenshot shows the 'Free Tasks' page in the FuTura Bank system. The 'Reassign' button is highlighted with a red box. The table below shows a list of tasks with columns for Action, Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024410	GS1	000262	£2,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
<input type="checkbox"/> Acquire & Edit	M	GS1ELCL0024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	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.

Hold Tasks

Refresh Resume Flow Diagram

<input checked="" type="checkbox"/>	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/>	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

<input checked="" type="checkbox"/>	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/>	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 navigation menu with items like Core Maintenance, Corporate Lending, Dashboard, Maintenance, Security Management, Tasks, Trade Finance, and Virtual Account Manage... The main content area is titled 'My Tasks' and includes a header with 'FBN UK (GS1)', 'Feb 1, 2019', and 'SRIDHAR01 subham@gmail.com'. Below the header are three buttons: 'Refresh', 'Release', and 'Flow Diagram'. A table displays two task records:

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

Below the table is a pagination control showing 'Page 1 of 1 (1-2 of 2 items)' and '1' in a box, with 'Previous' and 'Next' buttons.

- 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' interface. The 'Refresh', 'Release', and 'Flow Diagram' buttons are highlighted with red boxes. The table and pagination controls are 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
- Amount
- Contract Reference Number
- Other Bank Reference Number



Note

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

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

Following actions can be performed 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 user 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 filter controls. The 'Task List' table contains the following data:

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

The 'Acquire' and 'FlowDiagram' options in the first row are highlighted with a red box. The 'Tasks' filter section on the left shows 'Free Tasks' selected.

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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