

Task Management Dashboard

DevOps Package Name : CDM - Task Management

Each user who has an associated operator has access to the Task Management Dashboard

The operator can change its status by pressing one of the 3 buttons:

- “Become Ready” button change operator status to Ready and all tasks with AllocatedButHoliday status, associated with the operator, become Allocated status
- “Become Unready” button change operator status to NotReady
- “Holiday” button change operator status to NotReadyHoliday and all tasks with Allocated, associated with the operator, become Allocated ButHoliday status

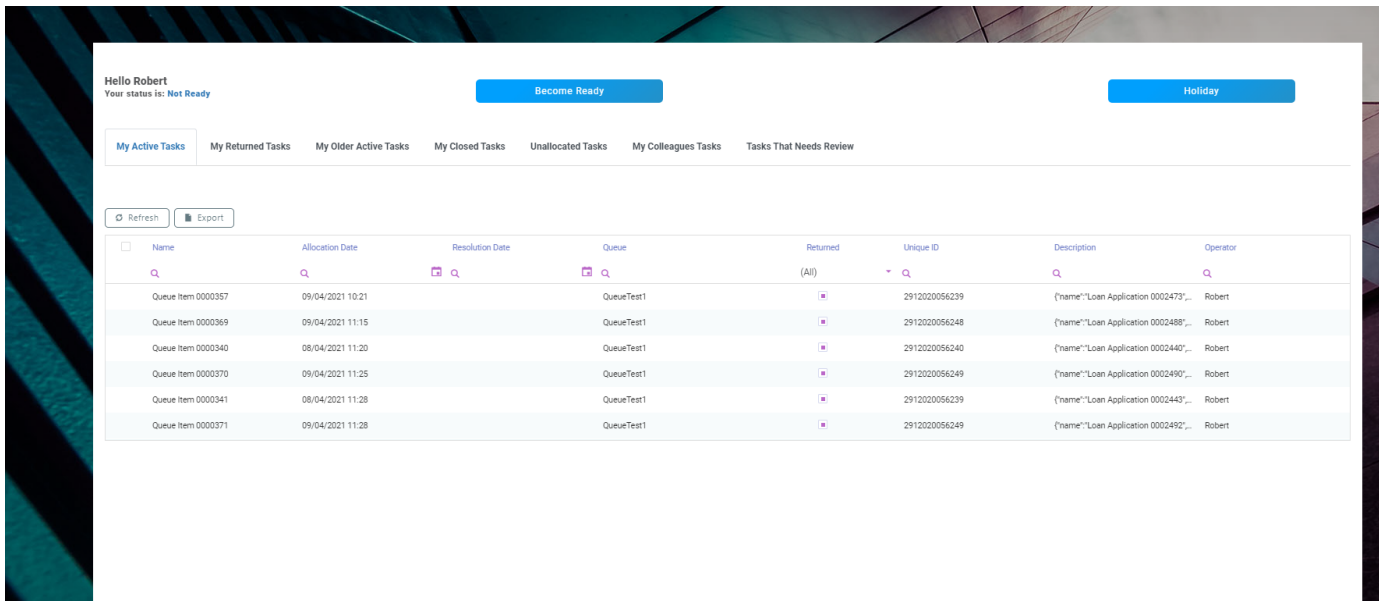
Task Management Dashboard contains 7 tabs:

- ['My Active Tasks' Tab](#)
- ['My Returned Tasks' Tab](#)
- ['My Older Active Tasks' Tab](#)
- ['My Closed Tasks' Tab](#)
- ['Unallocated Tasks' Tab](#)
- ['My Colleagues Tasks' Tab](#)
- ['Tasks That Needs Review' Tab](#)

1. Prerequisites for using business component

Common Data Model Installed

2. Print screens and Business Description and few words for where you can use it



The tabs are designed so that a tasks can be followed easily and give the operator structure an priority indications for his work. An operator can automatically receive tasks only if he's status is “ready”. The allocation process is triggered when the task is created and if not successful, the task will remain unallocated and available for manual reallocation from the unallocated tab. So it would be advised that when an operator comes to work, he makes sure to click the “become ready” button and when he leaves he clicks the “become unready” button.

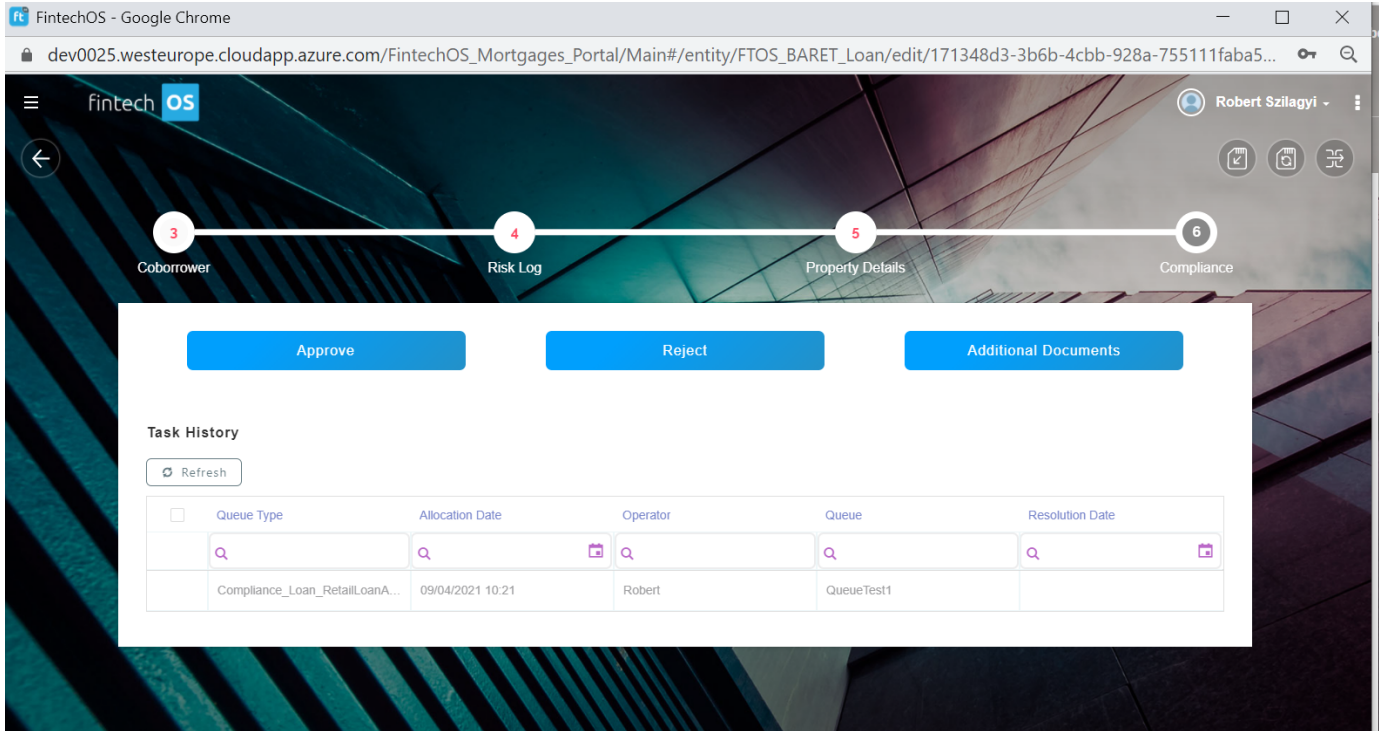
In the top right corner the user name and status is displayed, this can help to confirm that the Become Ready button has registered properly and the operator is ready to receive tasks.

Under the Tab name there are two buttons labeled as Refresh and Export. The refresh function is automatic by default and does this every 5 seconds but in case of need, the user can manually do this from this button. The export button gives the opportunity to extract the data from the current line/set into an XLS file.

The columns displayed in the tabs are:

- Name - this is the ticket number assigned for the task
- Allocation date - The date and time the the task was allocated to an operator
- Resolution Date - date and time an operator has set a resolution for the task
- Queue - the name of the queue in which the task has been allocated
- Returned - indicates if the task was previously managed by the same user and is returning again
- Unique ID - personal identification number for the customer
- Description - is a description that can provide further clarification about the task and can be written when the task is created
- Operator - Name of the operator that the task is assigned to
- Pick up - the option to allocate a task manually - only for certain users

In this view, the operator can pick up tasks and review them by double clicking on the row. The information displayed is editable and imported from the record form. After reviewing the task, the operator has 3 options:



- Approve - is a final resolution that approves the request and no further actions are required
- Reject - is a final resolution that rejects the request. For this resolution there is a mandatory "reject reason" field that needs to be filled in by the operator.
- Additional Documents - is an intermediary resolution that pushes back the task to the user that originated it and requires additional information/documents for the operator to give a final resolution. After the information/documents are provided, the task will return to the same operator and can be found in the "my returned tasks" tab.

3. Steps of the business component

4. Banking Control Panel Parameters used for the business component

None

5. Database model

FTOS_CMB_QueueItem

FTOS_CMB_Operator

FTOS_CMB_OperatorXQueue

FTOS_CMB_Queue

FTOS_CMB_QueuePriority

FTOS_CMB_CompetenceLevel

6. Libraries used and why

Server Script Library - FTOS_CMB_TaskManagementHelper

7. Server Scripts

FTOS_CMB_GetOperatorInfo - returns information about the Operator

- Input:
System User ID from systemuser_entity - `systemUserId`
- Output:
Status Operator from FTOS_CMB_Operator - `BusinessStatus`
Status ID Operator from FTOS_CMB_Operator - `BusinessStatusId`
Status Operator from FTOS_CMB_Operator - `BusinessStatusLabel`
HasHoliday from FTOS_CMB_Operator - `HasHoliday: false`
Operator ID from FTOS_CMB_Operator - `ID`
Operator last allocation date from FTOS_CMB_Operator - `LastAllocationDate`
Operator Name from FTOS_CMB_Operator - `Name`

FTOS_CMB_ChangeOperatorStatus - change the operator status in "Ready", "NotReady" or "NotReadyHoliday"

- Input:
The status ID in which the change is made - `statusId`
Operator ID from FTOS_CMB_Operator - `operatorId`
`hasHoliday: true or false`

FTOS_CMB_GetActiveQueuesOlderView - is called from the view: displayActiveQueueItemOlder(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['My Older Active Tasks' Tab](#)

FTOS_CMB_GetActiveQueuesView - is called from the view: displayActiveQueueItem(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['My Active Tasks' Tab](#)

FTOS_CMB_GetReturnedRequestsView - is called from the view: displayReturnedRequests(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['My Returned Tasks' Tab](#)

FTOS_CMB_GetAllocatedRequestsToMyColleaguesView - is called from the view: displayAllocatedRequestsToMyColleagues(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['My Colleagues Tasks' Tab](#)

FTOS_CMB_GetUnallocatedQueuesView - is called from the view: displayUnallocatedRequests(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['Unallocated Tasks' Tab](#)

FTOS_CMB_GetClosedQueuesView - is called from the view: displayClosedQueueItem(FTOS_CMB_QueueItem). Change the data source of the view, composing a dynamic fetch. Returns the records that are displayed in the grid on the ['My Closed Tasks' Tab](#)

FTOS_CMB_PickUpQueue - Allocate a Task to current operator ID

- If the task is unallocated - script will update task on current line(`operatorId = current operatorId`) and change the status to Allocated.
- If the task is allocated to my colleagues which are in holiday. The script will change the status from Allocated to ClosedReallocated to actual task and create a new line in FTOS_CMB_QueueItem and put the new Operator on `operatorId` attribute, status Allocated.

8. Stored Procedures

None

9. Filtered fields

None

10. Validations and Actions performed with Field Options

None

11. Actions called by the component , why and where

None

12. Processors called by the component , why and where

None

13. Validations to go forward

None

14. Actions triggered by Row Double Click

Opent the record form in edit mode. The link is generated using the attributes: recordId, mainEntityId and mainFormId from FTOS_CMB_QueueItem

15. Style Sheets used and where

FTOS_CMB_QueueStylesheet