

Queue

DevOps Package Name : CDM - Task Management

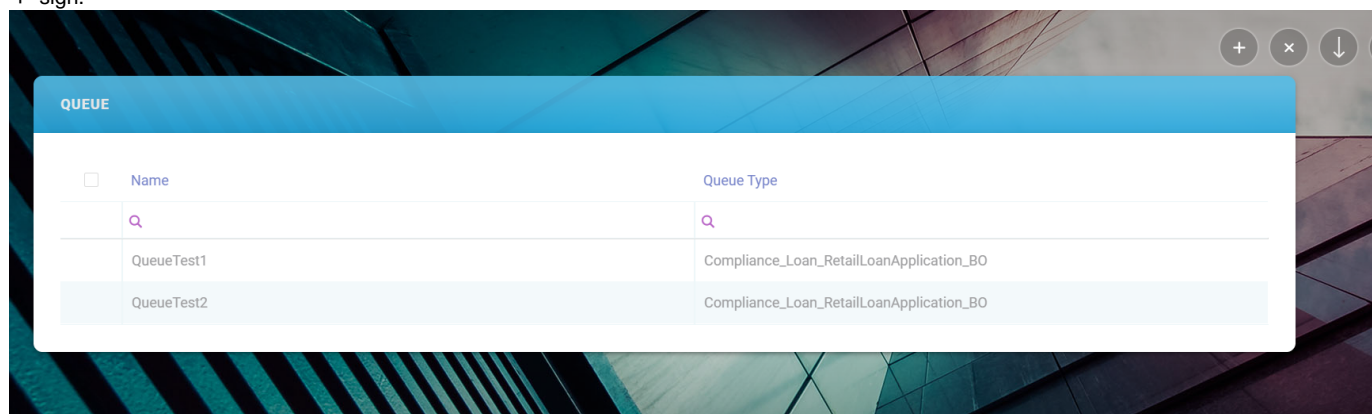
This Form was created in order to have an overview and access to configure the Queue.

1. Prerequisites for using business component

Common Data Model Installed

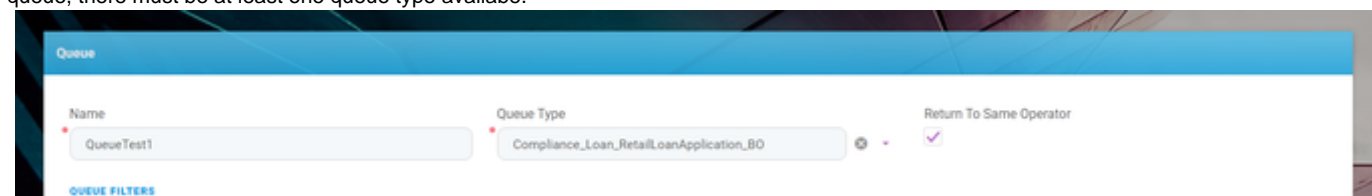
2. Print screens and Business Description and few words for where you can use it

At first, the grid will show all the available queues. The admin has the option to select an existing que or to create a new one using the top right “+” sign.



<input type="checkbox"/>	Name	Queue Type
<input type="checkbox"/>	QueueTest1	Compliance_Loan_RetailLoanApplication_BO
<input type="checkbox"/>	QueueTest2	Compliance_Loan_RetailLoanApplication_BO

For the user applications to be displayed as tasks and assigned to an operator, a queue must be created of a certain type. In order to create a queue, there must be at least one queue type available.



Queue

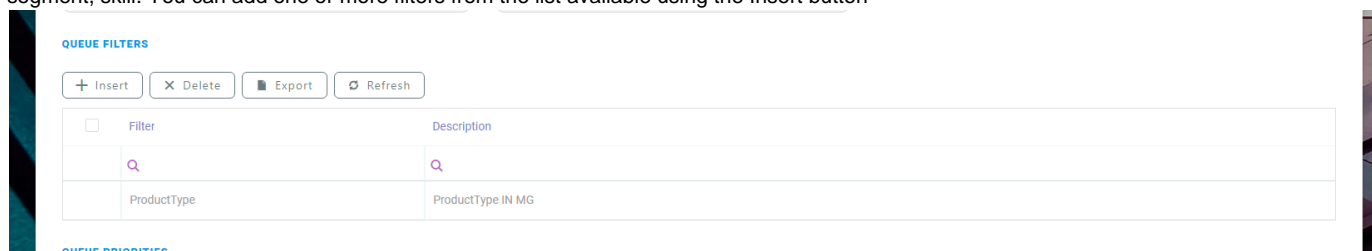
Name: QueueTest1

Queue Type: Compliance_Loan_RetailLoanApplication_BO

Return To Same Operator: ☒

Queue Filters

Following grid will display all the filters attached to the current Queue. On insert/edit, it will open [QueueFilterForm](#). Filters can be applied to make the queue more specific. For instance, using filters you can set the queue to run only for a certain product, for specific amounts, customer segment, skill. You can add one or more filters from the list available using the Insert button



QUEUE FILTERS

+ Insert X Delete Export Refresh

<input type="checkbox"/>	Filter	Description
<input type="checkbox"/>	ProductType	ProductType IN MG

Queue Priorities

Following grid will display all the priorities attached to the current Queue. On insert/edit, it will open [QueuePriorityForm](#). Queue Priorities can be set to define the order the tasks appear in the views and help to organize work.

QUEUE PRIORITIES

<input type="checkbox"/>	Name	Field	Order By Type	Priority
<input type="checkbox"/>	Q	Q	Q	Q
No data				

OperatorXQueue

Following grid will display all the operators attached to the current Queue. On insert/edit, it will open [OperatorXQueueForm](#). An operator can be assigned to multiple queues. In this screen you can edit or add new operators for a specific queue. To add an operator Click on the "+" button on the top right corner and fill in the following:

- Name - the name of the Operator
- Queue - is the current queue set by default
- Operator - the list of operators available to select from
- Competence level - the competence level assigned for that operator in this queue.
- Max active item allocation value - the maximum number of tasks an operator can have from this queue.

OPERATORXQUEUE

<input type="checkbox"/>	Name	Queue	Last Allocation Date	Item Count	Max Active Items	Priority for
<input type="checkbox"/>	Q	Q	Q	Q	Q	Q
	QueueTest1 - Oana3 Ciortianu	QueueTest1				
	QueueTest1 - Oana2 Ciortianu	QueueTest1				1
	BO	QueueTest1	01.04.2021 16:18	15		1
	QueueTest1 - Oana Ciortianu	QueueTest1	31.03.2021 14:56	9		1
	BO	QueueTest1	01.04.2021 14:20	14		1
	Robert on QueueTest1	QueueTest1	01.04.2021 14:29	1		1
	QueueTest1	QueueTest1			10,000	1
	QueueTest1	QueueTest1	01.04.2021 16:34	4	100	1
		QueueTest1				2

OperatorXQueue

Name
 Queue
 Operator
 Competence Level
 Last Allocation Date
 Max Active Item Allocation Number
 Item Count

Competence levels

Following grid will display all the Competence levels attached to the current Queue. On insert/edit, it will open [CompetenceLevelForm](#). A queue can have multiple competence levels assigned to it so that the tasks can be allocated to the necessary operators with the needed competence to work on them. You can edit competence level characteristics from this sections by double clicking on them and editing:

- Name - competence level name for that specific queue
- Queue - the queue name for the competence level assigned

- Level - this can be used to define the level in numerical value
- Replacement Competence Level - every queue has the option to have an replacement competence level. The replacement competence level can be set to help in case the operators with the necessary competence level are full with tasks. If tasks can't be allocated to the required competence level because of workload, replacement competence level will kick in and start assigning tasks for that particular replacement level. Operators with replacement competence level can review tasks and set a resolution but it won't be final. after the replacement competence operator sets a final resolution, a new review task will be created for the operators with the requested competence level. This is meant to help with supervision in case there is need for it. the replacement competence level can help balance tasks between different groups of operators and ease the work load for any specific type of competence level.

COMPETENCE LEVELS

Export Refresh

Name	Level
Level1 on QueueTest1	
Level2 on QueueTest1	
Level3 on QueueTest1	

Competence Level

Name: Level1 on QueueTest1 Queue: QueueTest1 Level: 1

Replacement Competence Level: Level2 on QueueTest1

COMPETENCE LEVEL FILTERS

+ Insert X Delete Export Refresh

Description
RequestedLoanAmount >= 0 - 80000

Queue Items

Following grid will display all the QueueItems of the current Queue. On edit, it will open [QueueItemForm](#). In this section the user can view all tasks allocated to that specific queue. this can help determine the entire workload for the queue, search for a specific item, monitor the assignation process. Also, in this area, the admin can manually allocate a task to the desired operator. To do this, you can double click on the que item and from the operator field you can selected any operator assigned to that queue and then click save and close.

The Queue Items list will depict the following columns:

- Name - the ID for the queue item
- Status - shows the status for the queue item. the available statuses are:
 - New- this is the default status for a new ticket, its assignat at the creation of the task
 - Allocated - this status will take place when the ticket has been allocated to an operator
 - Closed - this status will be set after the operator will review the task and select one of the three options:
 - Approve
 - Reject
 - Require more documents - in this instance, when the user responds with the additional documents/info requested, a new task will be created and the Previous Queue Items field will contain the name of this task.
- Operator - the name of the operator tasked with the ticket
- Record Name - the record tied to the current task
- Record Date - the date and time the current record has been created
- Unique ID - the customer unique identifier
- Task date - the date and time the current task was generated

The fields on the queue item record are:

- Name - queue item ID
- Required competence level - the needed competence level to review the task. This is calculated automatically by the rules set for the allocation process but the admin can edit the required competence level in this area for specific items
- To review - this tick box marks the task is needing review from the original competence level in case it was reviewed by a replacing competence level operator
- Returned - this tick box marks if the task has returned to the original operator, in case there were additional documents/info needed to finalize the request.
- Operator - the current operator assigned to that task
- Operator Profile - the profile set for the designated operator
- Operator competence level - the competence level of the operator that has been assigned with the task
- Task date - the date and time the task was created
- Allocation date - the date and time the task was allocated to an operator
- Resolution date - the date and time of the last resolution set on the task
- Replacement operator - this field is filled in in case a replacement operator has been assigned with that task
- Previous Queue Items - this field will help identify previous tasks that were correlated to the current one. For example, if a task was sent back to the originator for further clarification using the request more documents function, when a new task is created, the Previous Queue Items will have the Name of the task related to filled in.

QUEUE ITEMS

Export

Refresh

<input type="checkbox"/>	Name	Status	Operator	Record Name	Record Date	Unique ID	Task Date
<input type="checkbox"/>	Queue Item 0000202	Allocated	oana test1	Loan Application 0002247	01.04.2021 10:23	1515151515	01.04.2021 10:24
<input type="checkbox"/>	Queue Item 0000203	Allocated	oana test1	Loan Application 0002248	01.04.2021 10:28	1515151515	01.04.2021 10:29
<input type="checkbox"/>	Queue Item 0000204	Allocated	oana test1	Loan Application 0002249	01.04.2021 10:37	1515151515	01.04.2021 10:38
<input type="checkbox"/>	Queue Item 0000205	Allocated	oana test1	Loan Application 0002250	01.04.2021 10:47	1515151515	01.04.2021 10:48
<input type="checkbox"/>	Queue Item 0000206	Allocated	oana test1	Loan Application 0002251	01.04.2021 10:49	1515151515	01.04.2021 10:49
<input type="checkbox"/>	Queue Item 0000207	Allocated	oana test1	Loan Application 0002253	01.04.2021 10:57	1515151515	01.04.2021 10:58

Queue Item

Name

Queue Item 0000396

Required Competence Level

Level2 on QueueTest1

To Review

☐

Returned

☒

Operator

Liviu Pinzaru

Operator Profile

Profile3 - CS Default & RiskList - BlackLi...

Operator Competence Level

Select a value...

Task Date

09/04/2021 18:20

Allocation Date

12/04/2021 10:56

Resolution Date

Replacement Operator

Select a value...

Previous Queue Item

Description

{ "name": "Loan Application 0002525", "loanAmount": 85000, "financedAmount": 42500, "downPayment": 42500, "interestRate": 8.5 }

3. Steps of the business component

4. Banking Control Panel Parameters used for the business component

None

5. Database model

- FTOS_CMB_QueueFilter
- FTOS_CMB_Filter
- FTOS_CMB_OperatorXQueue
- FTOS_CMB_QueuePriority
- FTOS_CMB_QueueType

6. Libraries used and why

None

7. Server Scripts

None

8. Stored Procedures

None

9. Filtered fields

None

10. Validations and Actions performed with Field Options

- Name - Field is Required
- QueueType - Field is Required

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

None

15. Style Sheets used and where

None