

CYBAGE

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Instructor Lead Training

Brief: This ILT session was created to provide an overview of various features of a banking application, accompanied by handouts.

Tools & Technologies:



Acrobat PDF



Microsoft PPT



PRISM CONFIGURATION – MANAGE QUEUES

Objective



By the end of this training session, you will be able to add, edit, delete, and view queues.



Introduction



- Queues display a logical grouping of tasks based on roles or business rules.
- There are two types of queues – Role Queue and Custom Queue.
- The Manage Queue page allows the user to:
 - Manage queues
 - Add Custom Queues
 - Edit Role Queues
 - Associate roles to a queue (view all the queues in the system)

Default Queue and Custom Queue



- Advanced
- Spreadsheet Template
- Manage Users and Groups
- Manage Workflows
- Manage Tasks
- Manage Labels
- Manage Lookup
- Setup Index Rate
- Setup Currency Rate
- Manage Program/Product
- Setup Funding Rate
- Deal User Team
- Rules
- Team Roles
- Checklist Summary
- Manage Fee
- Manage Queue**
- Security Settings

- You can add, edit, and view queues on the Manage Queue page.
- When you assign a role using the Team Role, a default queue is created for that role in Manage Queue.
- Custom queues are created on the Manage Queue page.

Queue Summary

Queue Summary + Add

1 2 3 Next Last

| Queue Code ▲ | Queue Name | Queue Type | Action |
|--------------|--------------------------|------------|--------|
| DEFESCQUEUE | Default Escalation Queue | Custom | ▼ |
| QA_QA | QA_QA | Custom | ▼ |
| QC_1 | Queue Name 1 | Custom | ▼ |

Adding Custom Queues



- Click **Manage Queue** on the sidebar of the Homepage to open the Queue Summary page.
- Click **Add**.
- Enter the Queue Code, Queue Name, and Queue Type.
- Select an escalation queue from the list; when a role is deleted, the tasks are added to the selected escalation queue.
- Enter the Description and click **Save**.
- The queue is displayed on the sidebar of the Homepage.

The screenshot shows two parts of a web application interface. The top part is the 'Queue Summary' page, which includes a search bar, a table of existing queues, and an 'Add' button highlighted with a red box. The bottom part is the 'Queue Details' form, which has fields for Queue Code, Queue Name, Queue Type, Escalation Queue, and Description, along with 'Save' and 'Cancel' buttons.

Queue Summary

Queue Summary + Add

Prev 1 2 3 4 5 Next

| Queue Code | Queue Name | Action |
|---------------|--------------------|--------|
| WQ_AUTHORISER | R_Authorizer QUEUE | ▼ |
| WQ_Add | R_Add QUEUE | ▼ |

Queue Details

Queue Code : * Test

Queue Name : * Test Queue

Queue Type: Custom

Escalation Queue: ▼

Description: Default Escalation Queue
QA_QA
Queue Name 1
T QUEUE Name
T QUEUE Name
R_RoleABC QUEUE
R_Admin QUEUE

Save Cancel

Adding Roles to Custom Queues



- Click **Details**.
- Click **Edit**.
- Select the role from the Roles list.
- Click **Save**.
- You can add multiple roles in multiple rows.



The Roles section is not displayed for Role queues.

Queue Summary

Queue Summary ➕ Add

1 2 3 Next Last

| Queue Code | Queue Name | Queue Type | Action |
|-------------|--------------------------|------------|---------|
| DEFESCQUEUE | Default Escalation Queue | Custom | Details |
| QA_QA | QA_QA | Custom | Edit |
| QC_1 | Queue Name 1 | Custom | Edit |
| TQUEUE | T QUEUE Name | Custom | |
| TQUEUE | T QUEUE Name | Custom | |

Queue Details

Queue Details

Queue Code : DEFESCQUEUE

Queue Name : Default Escalation Queue

Queue Type: Custom

Escalation Queue:

Description: DEFAULT ESCALATION QUEUE

Edit

Queue Details

Queue Details

Queue Code : * DEFESCQUEUE

Queue Name : * Default Escalation Queue

Queue Type: Custom

Escalation Queue:

Description: DEFAULT ESCALATION QUEUE

Roles

Role

Action

Admin
Agent
Authorizer
Booking analyst
Business Bank Officer
Chief Credit Officer
Clerk
Closing Manager

Save **Cancel**

Editing Queues



- Select **Edit** from the Action list corresponding to the queue. The Queue Details page opens. This is the same page that opens while adding a queue.
- Modify the required details and click **Save**.

Queue Summary

Queue Summary ➕ Add

1 2 3 Next Last

| Queue Code | Queue Name | Queue Type | Action |
|-------------|--------------------------|------------|-------------|
| DEFESCQUEUE | Default Escalation Queue | Custom | Details |
| QA_QA | QA_QA | Custom | Edit |
| QC_1 | Queue Name 1 | Custom | |
| TQUEUE | T QUEUE Name | Custom | |
| TQUEUE | T QUEUE Name | Custom | |

← Queue Details

Queue Details

Queue Code : * QA_QA

Queue Name : * QA_QA

Queue Type: Custom

Escalation Queue: T QUEUE Name

Description:

Roles ➕ Add

| Role | Action |
|--------------|--------|
| Loan Officer | |

Save Cancel

Deleting Queues



- Select **Delete** from the Action list corresponding to the queue. The deleted queue is removed from the list.



You can only delete custom queues. Role queues and Default Escalation queues cannot be deleted. The Role queues and Default Escalation queue will not have the Delete option in the Action list.

Custom Queue

| | | | |
|----------|---------------|---------|---|
| TESTQ | For Testing | Details | |
| TESTQUE | Test Queue 23 | Edit | |
| WQ_ADMIN | R_Admin QUEUE | Delete | |
| WQ_AGENT | R_Agent QUEUE | | ▼ |

Hands-On Exercise



Create a queue and assign Admin role to this queue.



For detailed steps, refer to the
Manage Queues - Exercise Solutions handout.

Summary



You should now be able to view, add, edit, and delete queues.

