



**STATE BANK OF PAKISTAN BANKING SERVICES CORPORATION**

**FOREIGN EXCHANGE OPERATIONS DEPARTMENT**

**SBP REGULATORY APPROVAL SYSTEM**

**USER ADMINISTRATION GUIDE**

**VERSION: 1.0**

March 24, 2020

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## Revision History

Version	Author(s)	Description of Change	Effective Date
1.0	i) Shakeel M. Paracha Senior Joint Director ii) M Najeeb Ahmed Deputy Director iii) Umer Ahmed Assistant Director		March 24, 2020

## 1. Introduction

This document is intended for the master Users of Authorized Dealers (ADs) who will manage the users of ADs. Regulatory Approval System (RAS) This manual is designed to provide an in-depth knowledge of user management of FEOD Case Management – External Portal. The step-by-step instructions are provided with screenshots to explain the procedures to enable the Administrator to manage respective bank's Users.

### **Disclaimer(s)**

This step-by-step guidance mentioned in this document is applicable to the Release 1.0 of the application. Any subsequent releases will be accompanied with additional guidelines, wherever applicable.

This User Manual is for authorized personnel of banks only and should not be shared, forwarded to any entity or uploaded on the internet or any other social media without permission from FEOD.

## 2. Project Description:

RAS will enable Authorized Dealer's to submit the case request using online portal to SBP-BSC Foreign Exchange Operations Department (FEOD).

The application provides following features:

1. Creation of User for Commercial Bank
2. Edit User Details
3. Disable User ID
4. Enable User ID
5. Reassignment of Cases

## 3. Instructions

### 3.1. Add User

#### 3.1.1. Functional Description:

1. SBP will create/provide one Admin user to each Bank for User Administration purpose.
2. For creation or change in Admin user, Banks are advised to contact FEOD. (if required)
3. The Administrator of Banks will have the User Management option on their dashboard to Add/Edit/Disable/Enable user(s) of their respective bank.
4. Management of Admin User will be managed by SBP-IT.

#### 3.1.2. Cautions and Warnings:

1. FEOD will convey each Commercial bank, the number of Users that can be created by them. Banks must satisfy themselves before creating a user that the intended officer(s) has the necessary expertise and qualification. In this regard, banks are required to devise an internal approval mechanism.
2. The user confirmation email will be sent to the email address entered by the Administrator while creating a user. ***This email address will be used as User ID at the time of login on RAS.*** In case of wrong email, user will not receive confirmation email and will not be able to login.
3. System will accept only official email address, therefore user must enter official email address on respective bank's domain. Non-official email addresses such as Gmail, Yahoo etc. should not be entered
4. While creating user, administrator must complete all fields with correct information especially the selection of User's Region. Bank will be responsible in case of entry of wrong information or creation of User ID of an un-authorized user.
5. Admin User must carry out a periodic review on quarterly basis for identification and removal of Dormant User Accounts.
6. Admin User must ensure that passwords are not shared among banks users. In case of any loss or risk arising out of password sharing, bank and its officials will be solely responsible and accountable.

#### 3.1.3. Probable Errors and Possible Causes

1. User might not receive the email because of invalid email id entered at the time of creation.
2. If the user is trying to add two users with same email address, the system will show an error that the user already exists.
3. User is trying to enter an invalid mobile number. The mobile number format should be 03\*\*\*\*\*. (11 Digits)

#### 3.1.4. Procedure:

##### 3.1.4.1. Set-up and Initialization

User should be registered in the system and must have administrator privileges.

### 3.1.4.2. Navigational Steps

Step	Description	Navigation	Comments
1.	Login to the application as administrator	Login to the application as described in the login scenario	User is redirected to the dashboard
2.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the previously created Users are shown in grid.
3.	Click on Create User Button	Click on the Create User button available on screen	User is redirected to Create User screen
4.	Enter Full Name	Click on Full Name Field and Enter User Full Name	<b>Full Name:</b> New User full name
5.	Enter Mobile Number	Click on Mobile Number Field and Enter User Phone Number	<b>Mobile Number:</b> New User Mobile phone number
6.	Enter Email Id	Click on Email Id Field and Enter User Email Id	<b>Email Id:</b> New User email address
7.	Select Region	Click on the Drop Down Menu	<b>Region:</b> Select Region of the User. (Region= Respective Field Office of SBPBSC)
8.	Click on Save button	Click on Save button available on screen	Admin is redirected to the user management screen and the message prompted "Successfully Created"  Email sent to the User email address with Temporary Password and Username and Application Access link  Note: New user can refer to Login scenario to setup account

### 3.1.5. User Interface:

**Step 1:** Click on User Management option available on side navigation

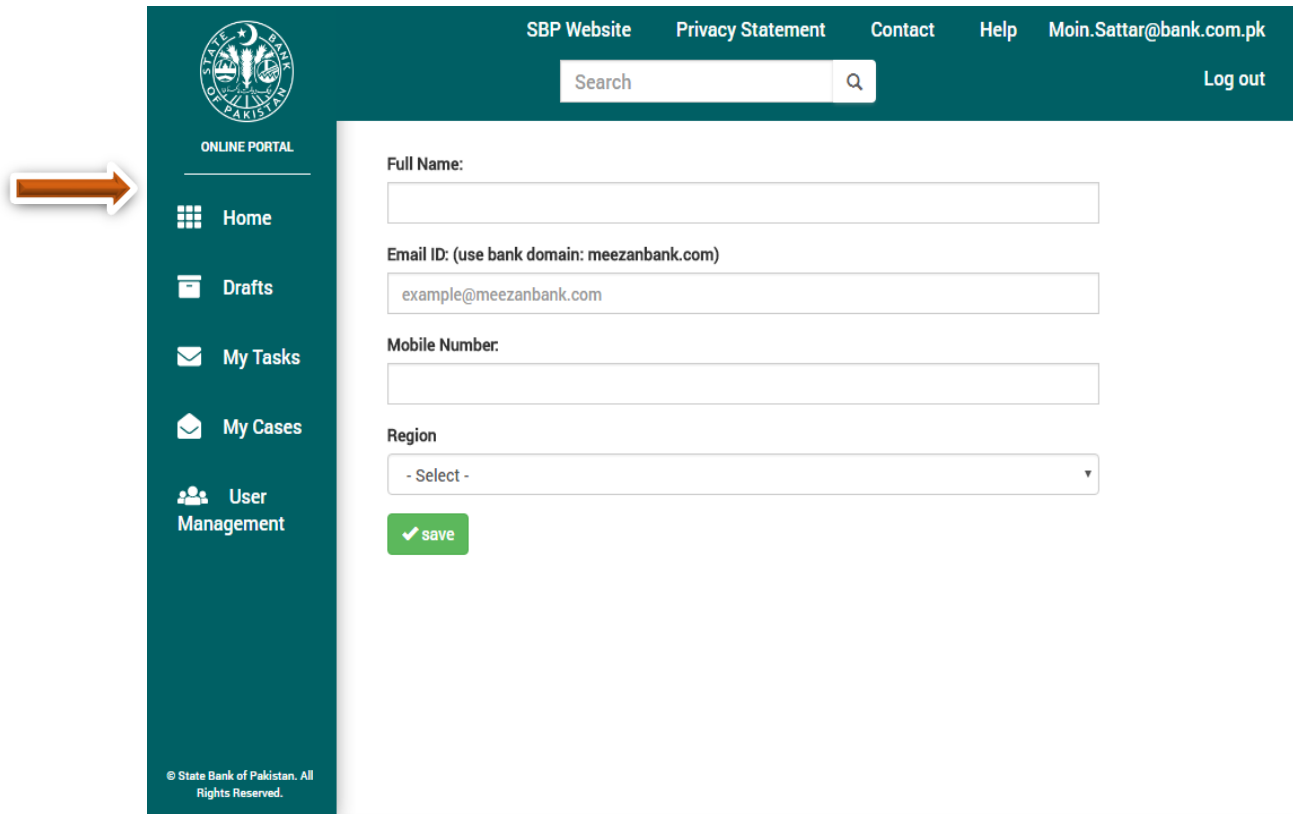
The screenshot shows the HBL Online Portal interface. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'hbladmin@techx.com'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and **User Management** (highlighted with a red box and an arrow). The main content area features the 'Initiate New Case' form with fields for Department, Category, Case Type, Case Title, and Region, along with a 'Proceed' button. On the right, there are four summary cards: 'Recent Submitted Cases', 'Recent Approved Cases', 'Recent Discrepant Cases' (showing Case No: SBPBSCHOKFEOD-WEBOC-HBL-485), and 'Recent Declined Cases'.

**Step 2:** Click on create user button. When first user will be created this screen will show no existing users.

The screenshot shows the 'User Management' screen in the HBL Online Portal. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'demo1.islamabad@bank.com.pk'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and **User Management** (highlighted with a red box and an arrow). The main content area features three buttons: '+ Enable User', '+ Create User', and '+ Task Reassign'. Below these buttons is a table of users with columns for Email, Bank, and Action.

Email	Bank	Action
hbladmin@hbl.com	HBL	Edit Disable
hbluser12@hbl.com	HBL	Edit Disable
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable

### Step 3: Add user details



SBP Website Privacy Statement Contact Help Moin.Sattar@bank.com.pk

Search  Q Log out

ONLINE PORTAL

- Home
- Drafts
- My Tasks
- My Cases
- User Management

Full Name:

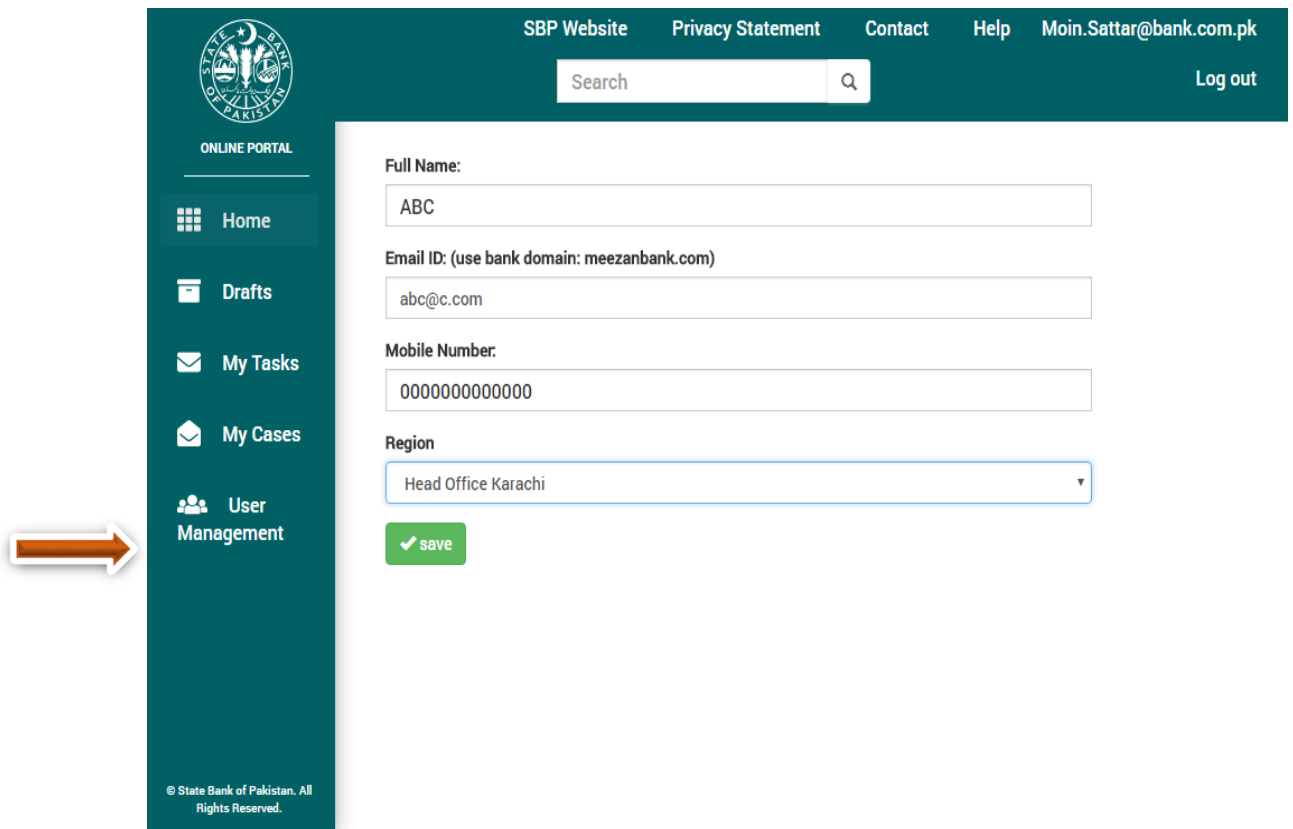
Email ID: (use bank domain: meezanbank.com)

Mobile Number:

Region:

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### Step 4: Click on Save button



SBP Website Privacy Statement Contact Help Moin.Sattar@bank.com.pk

Search  Q Log out

ONLINE PORTAL

- Home
- Drafts
- My Tasks
- My Cases
- User Management

Full Name:

Email ID: (use bank domain: meezanbank.com)

Mobile Number:

Region:


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### Step 5: User has been added successfully

SBP Website Privacy Statement Contact Help demo1.islamabad@bank.com.pk

Search

Log out

 ONLINE PORTAL

Home  
Drafts  
My Tasks  
My Cases  
User Management

Successfully created

+ Enable User + Create User + Task Reassign

Search

Email	Bank	Action
hbladmin@hbl.com	HBL	Edit Disable
hbluser12@hbl.com	HBL	Edit Disable
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable

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## 3.2.Edit User

### 3.2.1. Functional Description

Only the Administrator can edit the details of a User. Users who do not have administrator privileges will not be able to perform any action related to user management.

### 3.2.2. Cautions and Warnings:

1. The previous details of a User will be lost after edit/update in the system.
2. In this regard, an internal approval mechanism for editing/updating of User details may be devised by each bank.

### 3.2.3. Probable Errors and Possible Causes

1. User is trying to enter a wrong mobile number. The mobile number format should be 03\*\*\*\*\*. (11 Digits)

### 3.2.4. Procedure:

#### 3.2.4.1. Set-up and Initialization

User should be registered in the system and must have administrator privileges.

#### 3.2.4.2. Navigational Steps:

Step	Description	Navigation	Comments
1.	Login to the application as administrator	Login to the application as described in the login scenario	User is redirected to the dashboard
2.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the Users are shown in grid
3.	Click on Edit button	Click on the Edit button on any row in users grid available on screen	User is redirected to Edit User screen
4.	Enter Name	Click on Name Field and Enter User Full Name	<b>Name:</b> New User full name
5.	Enter Mobile Number	Click on Mobile Number Field and Enter User Phone Number	<b>Mobile Number:</b> New User phone number
6.	Click on Save button	Click on Save button available on screen	Admin is redirected to the user management screen and the message prompted "Successfully updated"

### 3.2.5. User Interface:

**Step 1:** Click on User Management option available on side navigation

The screenshot shows the SBP Online Portal interface. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'hbladmin@techx.com'. A search bar is present. The left sidebar contains the 'ONLINE PORTAL' logo and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box and an arrow). The main content area features the 'Initiate New Case' form with fields for Department, Category, Case Type, Case Title, and Region. A 'Proceed' button is at the bottom of the form. On the right, there are four panels for 'Recent Submitted Cases', 'Recent Approved Cases', 'Recent Discrepant Cases', and 'Recent Declined Cases'. The 'Recent Discrepant Cases' panel shows a case summary: Case No: SBPBSCHOK:FEOD-WEBOC-HBL-485, Dept: Foreign Exchange, Date: 1-10-2018, Operations Department | Category: WEBOC, with a 'View All' link. The footer contains copyright information for the State Bank of Pakistan.

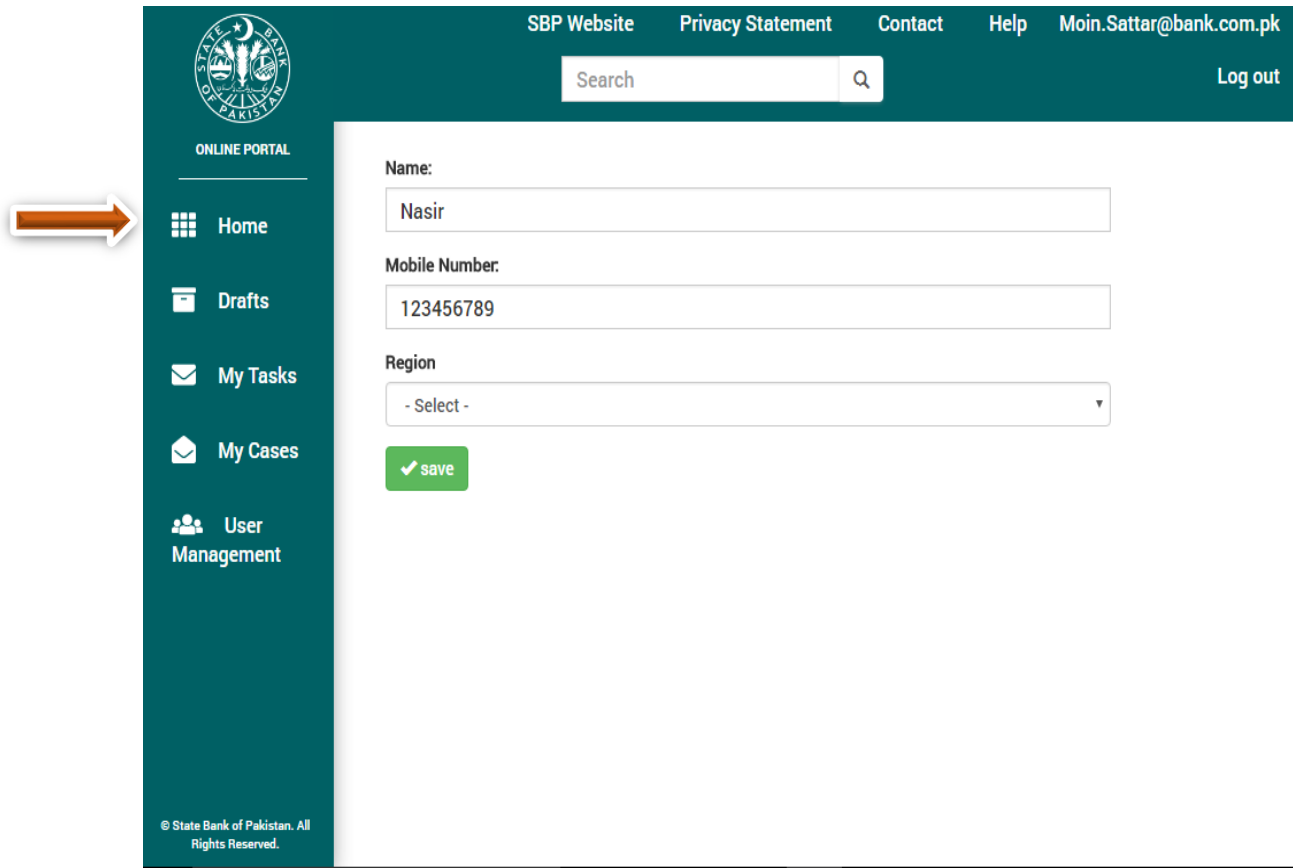
**Step 2:** Click on Edit button available on each row

The screenshot shows the 'User Management' page in the SBP Online Portal. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'Moin.Sattar@bank.com.pk'. A search bar is present. The left sidebar contains the 'ONLINE PORTAL' logo and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box and an arrow). The main content area features a '+ Create User' and '+ Task Reassign' button. Below is a table with columns for Email, Bank, and Action. The table contains the following data:

Email	Bank	Action
Moin.Sattar@bank.com.pk	MBL	Edit Disable
Farhan.raheem@bank.com.pk	MBL	Edit Disable
nasir.akbar@bank.com.pk	MBL	Edit Disable
Khawja.Hunanin@bank.com.pk	MBL	Edit Disable
ansar.mahmood@bank.com.pk	MBL	Edit Disable
ali.javed@bank.com.pk	MBL	Edit Disable
abc@abc.com	MBL	Edit Disable

The 'Edit' button for the user 'nasir.akbar@bank.com.pk' is highlighted with a red box and an arrow. The footer contains copyright information for the State Bank of Pakistan.

### Step 3: Edit user details



SBP Website Privacy Statement Contact Help Moin.Sattar@bank.com.pk

Search

Log out

ONLINE PORTAL

- Home
- Drafts
- My Tasks
- My Cases
- User Management

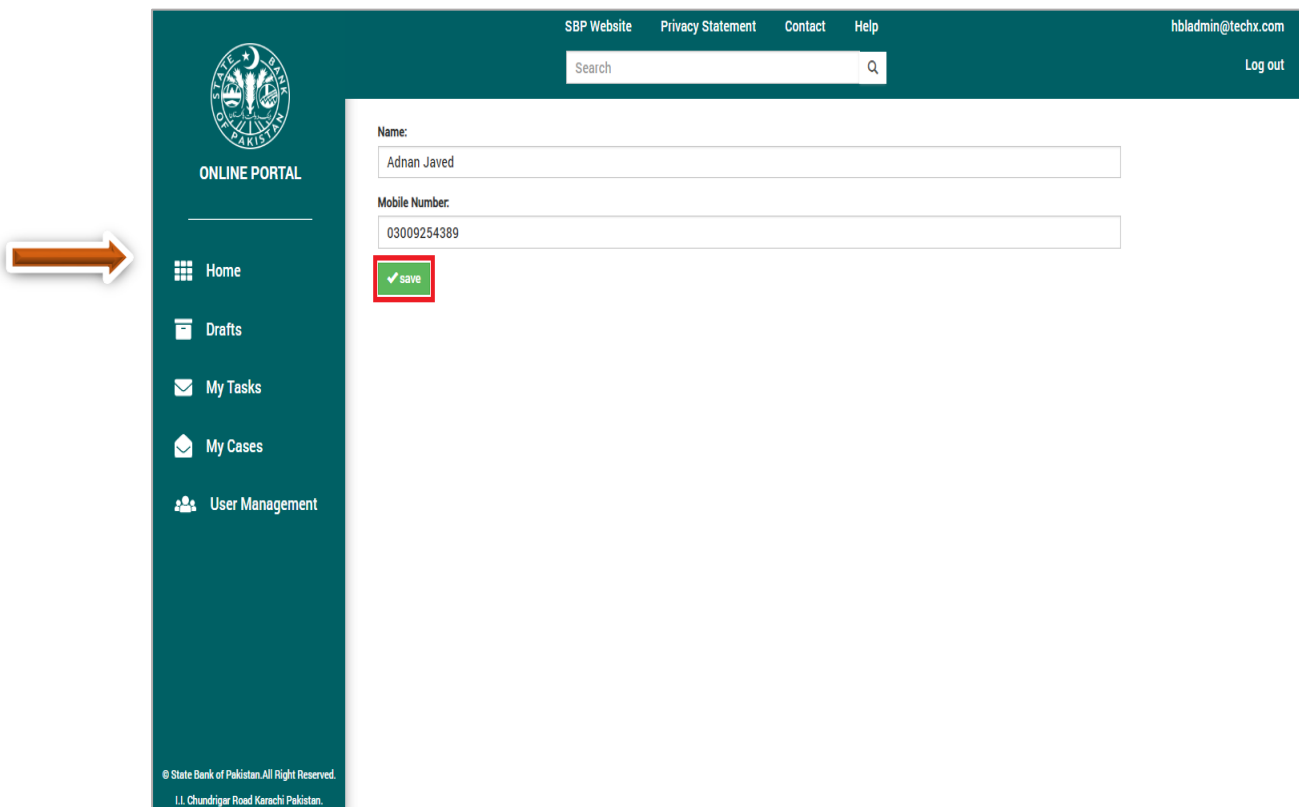
Name:

Mobile Number:

Region:

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### Step 4: Click on Save button



SBP Website Privacy Statement Contact Help hbladmin@techx.com

Search

Log out

ONLINE PORTAL


- Home
- Drafts
- My Tasks
- My Cases
- User Management

Name:

Mobile Number:

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Step 5: User has been updated successfully



SBP Website   Privacy Statement   Contact   Help   Moin.Sattar@bank.com.pk

Search

Log out

ONLINE PORTAL

- Home
- Drafts
- My Tasks
- My Cases
- User Management**

Successfully updated

Search

Email	Bank	Action
Moin.Sattar@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
Farhan.raheem@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
nasir.akbar@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
Khawja.Hunanin@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
ansar.mahmood@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
ali.javed@bank.com.pk	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
abc@abc.com	MBL	<input type="button" value="Edit"/> <input type="button" value="Disable"/>

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### 3.3.Disable User

#### 3.3.1. Functional Description

Only the Administrator can disable a User. User who does not have administrator privileges will not be able to perform any action related to user management.

#### 3.3.2. Cautions and Warnings:

1. **Administrator must ensure to re-assign the discrepant cases of intended officer prior to disabling the User.**
2. In this regard, an internal approval mechanism for disabling a User may be devised by each bank.
3. If a User is disabled, Administrator will be able to view and download decision letter on the case submitted by User from SBP-BSC FEOD.
4. If a User is disabled and the case(s) submitted by the User are marked Discrepant, Administrator will be able to reassign the case.

#### 3.3.3. Procedure:

##### 3.3.3.1. Set-up and Initialization

User should be registered in the system and must have administrator privileges.

##### 3.3.3.2. Navigation Steps

Step	Description	Navigation	Comments
1.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the Users are shown in grid
2.	Click on Disable button	Click on the Disable button on any row in users grid available on screen	User is redirected to Disable User screen which have following buttons 1. Disable 2. Cancel
3.	Click on Disable button	Click on the Disable button available on screen	User is redirected to user management screen and the message prompted "Successfully Disabled User"

### 3.3.4. User Interface:

**Step 1:** Click on User Management option available on side navigation

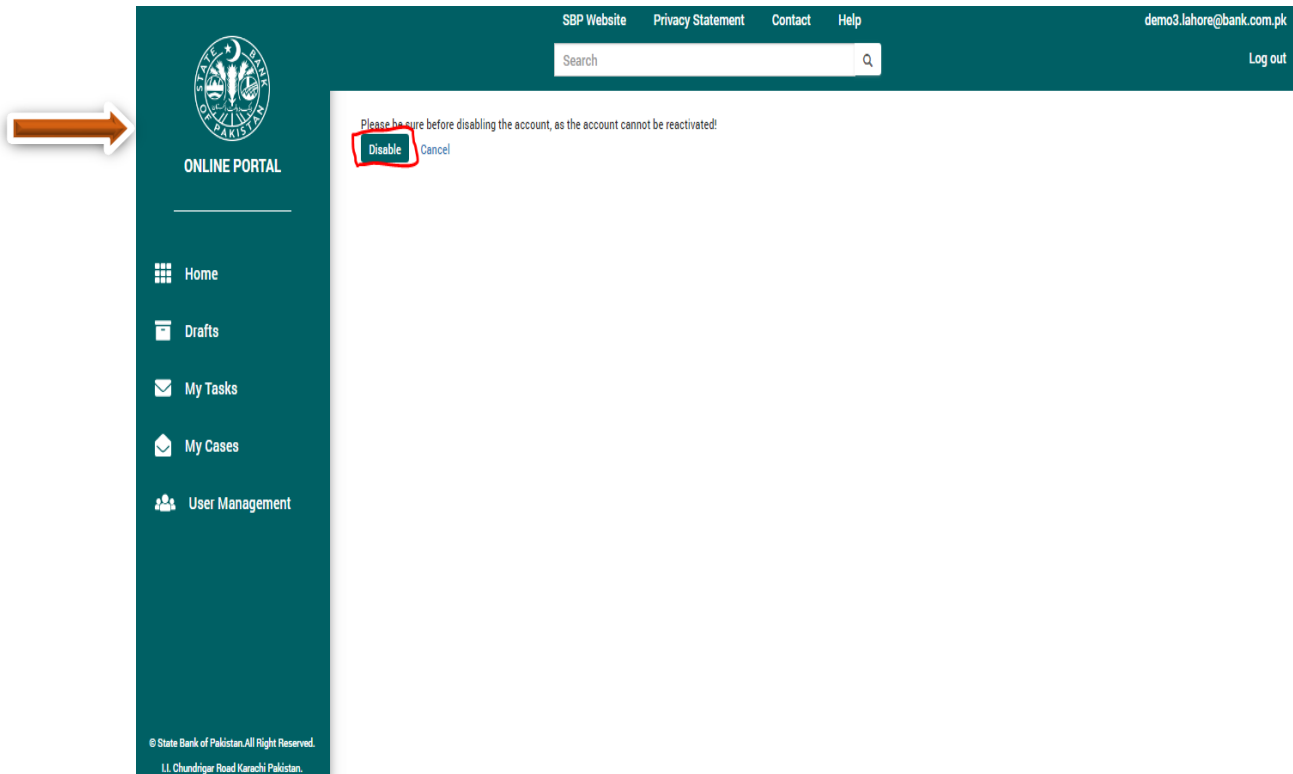
The screenshot shows the SBP Online Portal interface. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'hbladmin@techx.com'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box and an orange arrow). The main content area features the 'Initiate New Case' form with fields for Department, Category, Case Type, Case Title, and Region, and a 'Proceed' button. On the right, there are four summary cards: 'Recent Submitted Cases', 'Recent Approved Cases', 'Recent Discrepant Cases' (showing a case example), and 'Recent Declined Cases'.

**Step 2:** Click on Disable button available on each row

The screenshot shows the 'User Management' section of the SBP Online Portal. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'demo1.islamabad@bank.com.pk'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box). The main content area features a table with columns 'Email', 'Bank', and 'Action'. Above the table are buttons for '+ Enable User', '+ Create User', and '+ Task Reassign'. The table contains 9 rows of user data. The 'Action' column for each row contains 'Edit' and 'Disable' buttons. The 'Disable' button in the first row is highlighted with a red box and an orange arrow pointing to it.

Email	Bank	Action
hbluser12@hbl.com	HBL	Edit Disable
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable
najeeb110908@sbp.com.pk	HBL	Edit Disable

### Step 3: Click on Disable It button



SBP Website Privacy Statement Contact Help demo3.lahore@bank.com.pk

Search Q Log out

ONLINE PORTAL

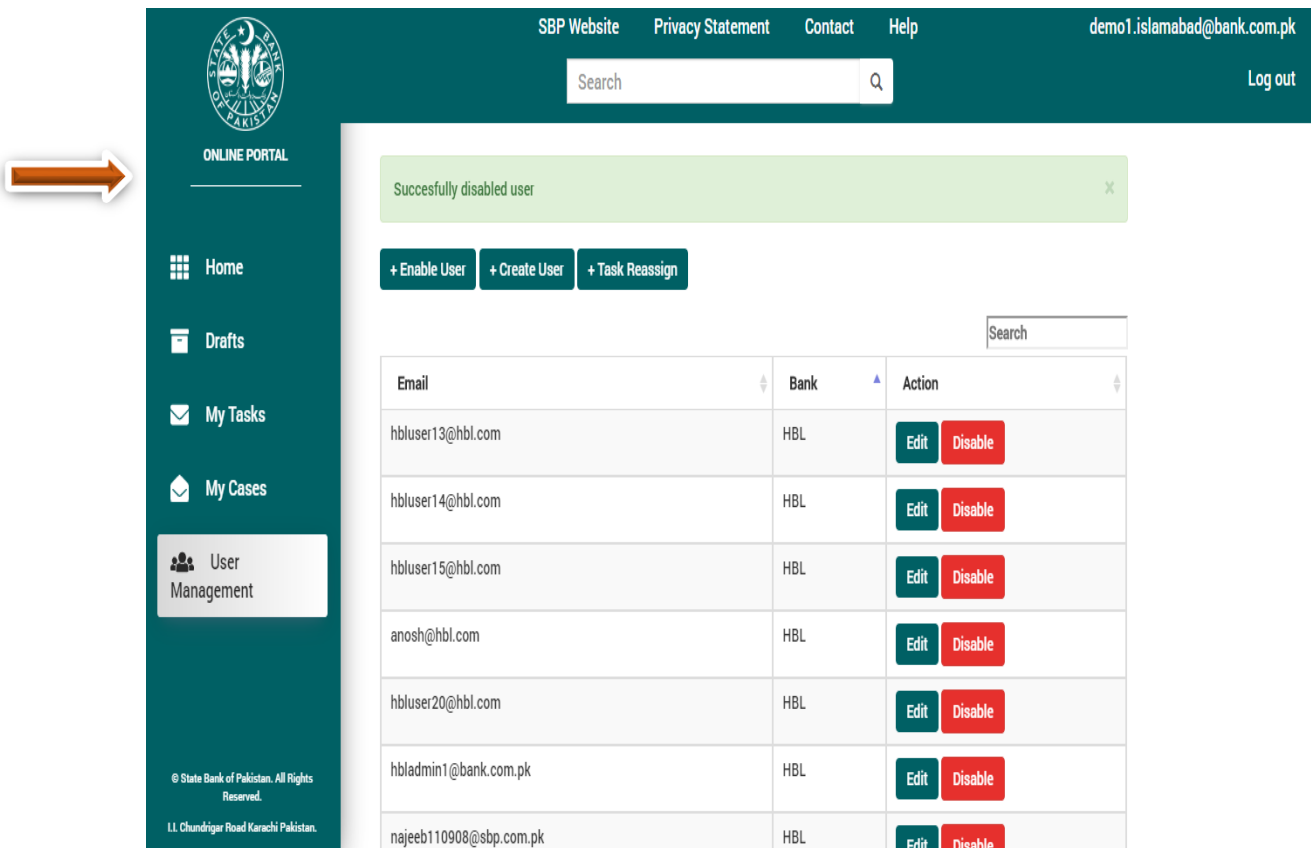
Home Drafts My Tasks My Cases User Management

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11 Chundrigar Road Karachi Pakistan.

Please be sure before disabling the account, as the account cannot be reactivated!

**Disable** Cancel

### Step 4: User has been disabled successfully



SBP Website Privacy Statement Contact Help demo1.islamabad@bank.com.pk

Search Q Log out

ONLINE PORTAL

Home Drafts My Tasks My Cases User Management

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11 Chundrigar Road Karachi Pakistan.

Successfully disabled user X

+ Enable User + Create User + Task Reassign

Email	Bank	Action
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable
najeeb110908@sbp.com.pk	HBL	Edit Disable

### 3.4.Enable User

#### 3.4.1. Functional Description

Only the Administrator can enable a User. User who does not have administrator privileges will not be able to perform any action related to user management.

#### 3.4.2. Cautions and Warnings:

1. **Administrator must ensure to enable user(s) who are in service of bank. Resigned/Retired users should not be enabled.**
2. In this regard, an internal approval mechanism for enabling a User may be devised by each bank.

#### 3.4.3. Procedure:

##### 3.4.3.1. Set-up and Initialization

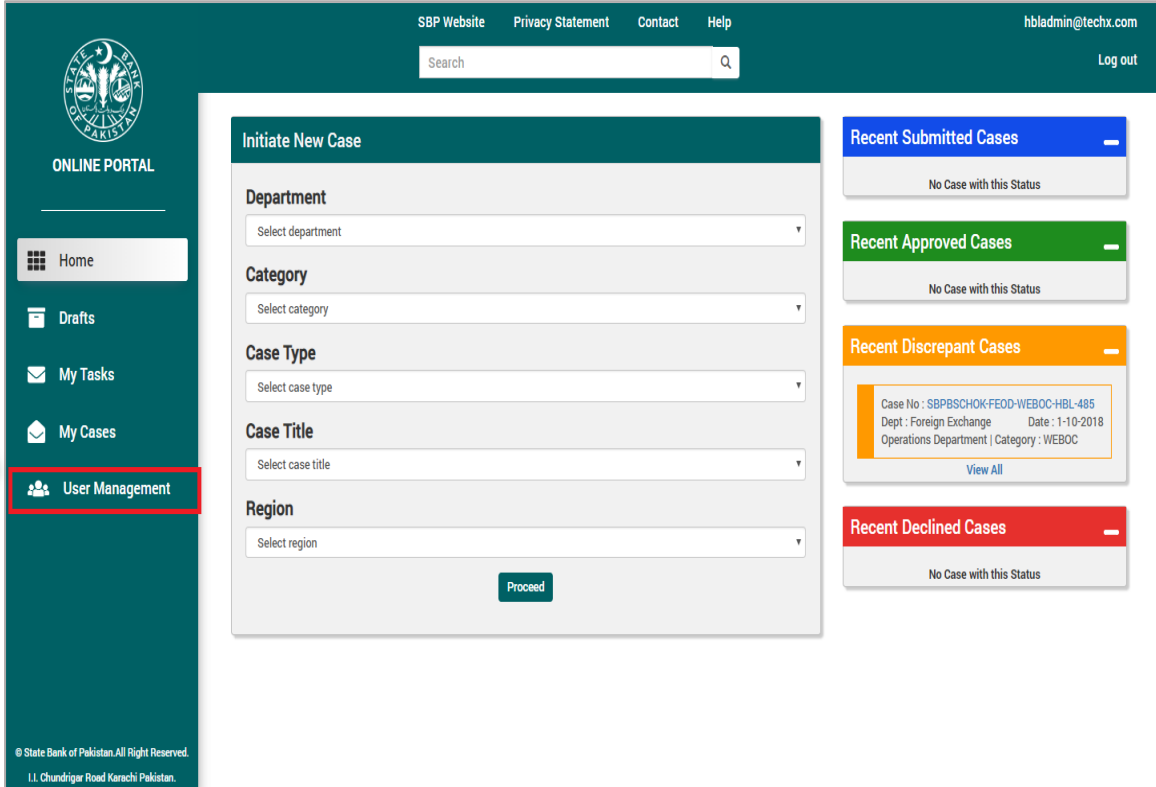
User should be registered in the system and must have administrator privileges.

##### 3.4.3.2. Navigation Steps

Step	Description	Navigation	Comments
1.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the Users are shown in grid
2.	Click on Enable button	Click on the Enable button on Top of screen.	User is redirected to Disabled User screen showing all disabled user of the bank.
3.	Click on Enable button	Choose your intended User and Click on Enable button	User is redirected to Enable User screen which have following buttons 1. Enable 2. Cancel
4.	Click on Enable button	Click on the Enable button available on screen	User is redirected to user management screen and the message prompted "Successfully Enabled User"

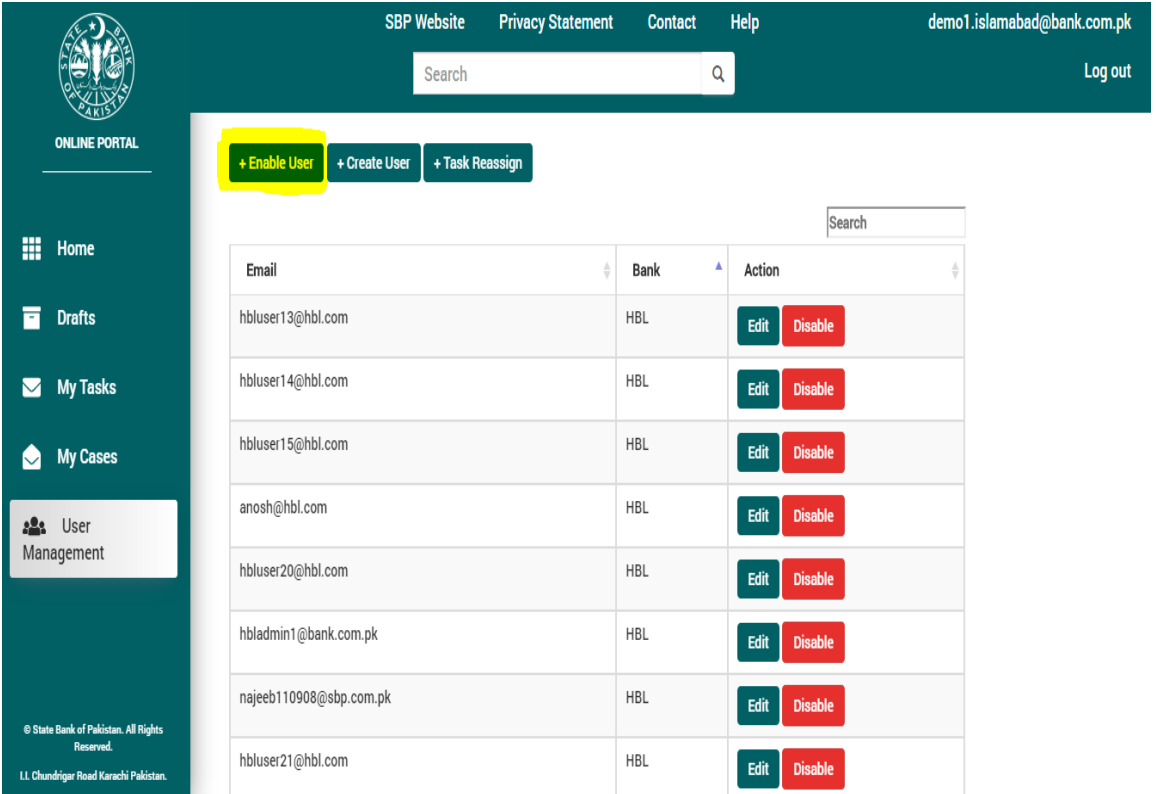
### 3.4.4. User Interface:

**Step 1:** Click on User Management option available on side navigation



The screenshot shows the SBP Online Portal interface. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'Log out' with the email 'hbladmin@techx.com'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box and an arrow). The main content area features the 'Initiate New Case' form with fields for Department, Category, Case Type, Case Title, and Region, and a 'Proceed' button. On the right, there are four summary cards: 'Recent Submitted Cases', 'Recent Approved Cases', 'Recent Discrepant Cases' (showing a case with details like Case No: SBPBSCHOK:FEOD-WEBOC-HBL-485), and 'Recent Declined Cases'.

**Step 2:** Click on Enable button



The screenshot shows the 'User Management' section of the SBP Online Portal. The top navigation bar includes 'SBP Website', 'Privacy Statement', 'Contact', 'Help', and 'Log out' with the email 'demo1.islamabad@bank.com.pk'. A search bar is present. The left sidebar contains 'ONLINE PORTAL' and navigation options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted with a red box and an arrow). The main content area shows a table of users with columns for Email, Bank, and Action. The '+ Enable User' button is highlighted with a yellow box and an arrow. The table contains the following data:

Email	Bank	Action
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable
najeeb110908@sbp.com.pk	HBL	Edit Disable
hbluser21@hbl.com	HBL	Edit Disable

### Step 3: Click on Enable button

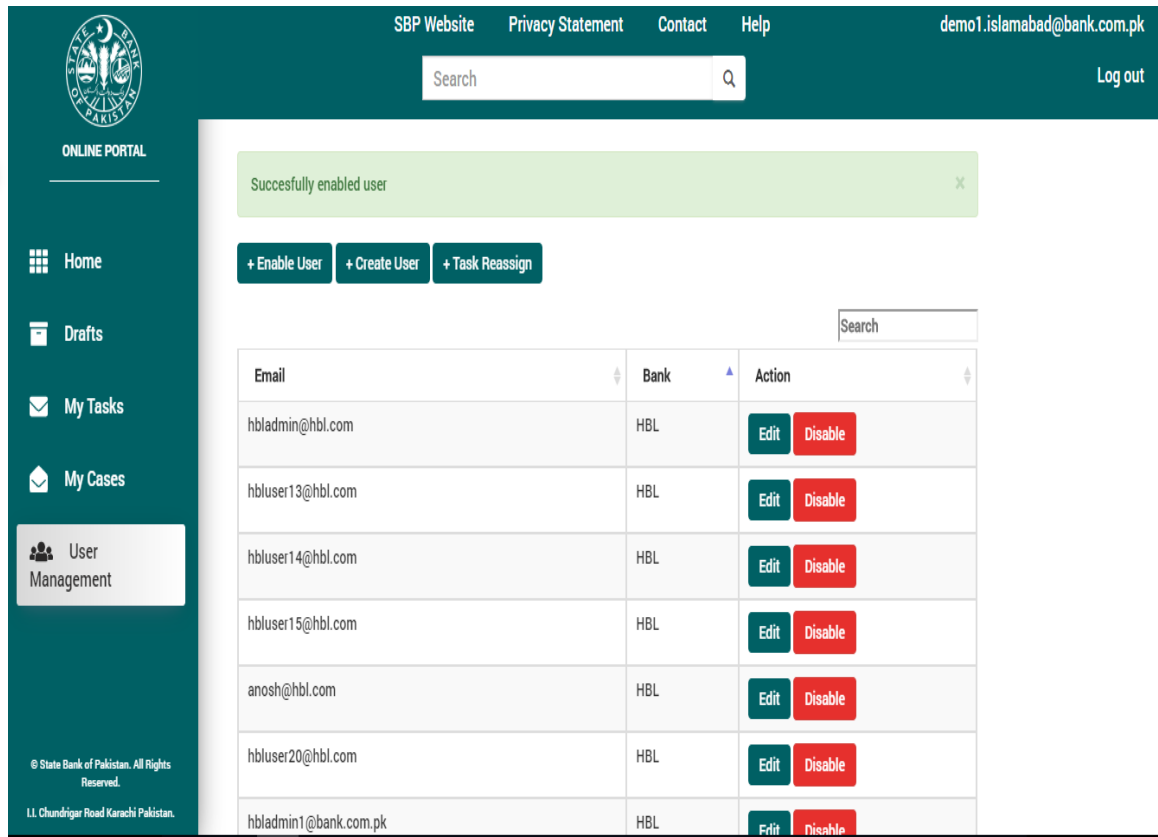
The screenshot shows the 'Disabled Users' section of the SBP Online Portal. A table lists several disabled users, each with an 'Enable' button. The 'Enable' button for the user 'hbladmin@hbl.com' is highlighted with a red box. An orange arrow points to this button from the left side of the page.

Email	Bank	Action
rushna.nizami@hbl.com	HBL	Enable
hbladmin@hbl.com	HBL	Enable
hbluser11@hbl.com	HBL	Enable
hbluser12@hbl.com	HBL	Enable
hbluser16@hbl.com	HBL	Enable
waseem@hbl.com	HBL	Enable
hbluser17@hbl.com	HBL	Enable

### Step 4: Click on Enable User

The screenshot shows a confirmation dialog box with the text 'Do you want to enable the account?'. There are two buttons: 'Enable' and 'Cancel'. The 'Enable' button is highlighted with a red box. An orange arrow points to this button from the left side of the page.

### Step 5: User has been enabled successfully



The screenshot shows the SBP Online Portal interface. At the top, there is a navigation bar with links for SBP Website, Privacy Statement, Contact, and Help, along with the user email demo1.islamabad@bank.com.pk and a Log out button. A search bar is also present. The main content area features a green notification banner that reads "Successfully enabled user". Below this, there are three buttons: "+ Enable User", "+ Create User", and "+ Task Reassign". A table with columns for Email, Bank, and Action is displayed, listing several users with their respective email addresses and HBL bank affiliation. Each user entry has "Edit" and "Disable" buttons. A search bar is located above the table. On the left side, there is a sidebar menu with options: Home, Drafts, My Tasks, My Cases, and User Management (highlighted). The footer contains copyright information for the State Bank of Pakistan.

Email	Bank	Action
hbladmin@hbl.com	HBL	Edit Disable
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable

## 3.5. Search User

### 3.5.1. Functional Description

Only the administrator has right to search all Users of respective bank.

### 3.5.2. Probable Errors and Possible Causes

1. The user name does not exist in the user group.

### 3.5.3. Procedure:

#### 3.5.3.1. Set-up and Initialization

User should be registered in the system and must have administrator privileges.

#### 3.5.3.2. Navigation Steps:

Step	Description	Navigation	Comments
1.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the Users are shown in grid
2.	Enter name in search box	Click on search field and Enter name of user	The grid displayed the record that match the entered user name

### 3.5.4. User Interface:

**Step 1:** Click on User Management option available on side navigation

The screenshot displays the State Bank of Pakistan Online Portal interface. The top navigation bar includes links for SBP Website, Privacy Statement, Contact, and Help, along with a search bar and a Log out button. The main content area is divided into a central 'Initiate New Case' form and a right-hand sidebar with case status summaries. The sidebar includes sections for 'Recent Submitted Cases', 'Recent Approved Cases', 'Recent Discrepant Cases', and 'Recent Declined Cases'. The 'Recent Discrepant Cases' section shows a specific case with details: Case No: SBPBSCHOK:FEOD-WEBOC-HBL-485, Dept: Foreign Exchange, Date: 1-10-2018, and Category: WEBOC. The 'User Management' option in the left-hand side navigation menu is highlighted with a red box and a blue arrow pointing to it.

## Step 2: Enter User name in search field

SBP Website Privacy Statement Contact Help demo3.lahore@bank.com.pk

Search

Log out

**ONLINE PORTAL**


- Home
- Drafts
- My Tasks
- My Cases
- User Management**

+ Create User

Search

Email	Bank	Action
rushna.nizami@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbladmin@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser11@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser12@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser13@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser14@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser15@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser16@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
anosh@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>
hbluser17@hbl.com	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>

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## Step 3: User has been searched successfully

SBP Website Privacy Statement Contact Help demo3.lahore@bank.com.pk

Search

Log out

**ONLINE PORTAL**


- Home
- Drafts
- My Tasks
- My Cases
- User Management**

+ Create User

Search

Email	Bank	Action
demo1.lahore@bank.com.pk	HBL	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Reassign</a>

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## 3.6.Re-Assignment of Cases

### 3.6.1. Functional Description

In case a Bank's User is on leave, resigned, etc. Administrator can re-assign the User's discrepant case(s) to another User. Users who do not have administrator privileges will not be able to perform any action related to user management.

### 3.6.2. Cautions and Warnings:

1. Once a case has been re-assigned previous User will not be able to view/change in the submitted case.
2. In this regard an internal approval mechanism for Re-Assignment of cases may be devised by each bank.

### 3.6.3. Probable Errors and Possible Causes

1. Previous User is trying to access submitted cases.

### 3.6.4. Procedure:

#### 3.6.4.1. Set-up and Initialization

User should be registered in the system and must have administrator privileges.

#### 3.6.4.2. Navigational Steps:

Step	Description	Navigation	Comments
1.	Login to the application as administrator	Login to the application as described in the login scenario	User is redirected to the dashboard
2.	Click on User Management	Click on the User Management option in the Side Navigation Bar or Side Menu available on screen	User is redirected to the User Management Screen where all the Users are shown in grid
3.	Click on Task Reassign button	Click on the Task Reassign button.	User is redirected to User Reassignment screen. User will be shown all active and disabled User of the Bank.
4.	Select User whose cases needs to be re-assigned.	Click on Reassign button.	User is redirected to case screen.
5.	Select Case	Click the check box for each case to be reassigned. Select User from a dropdown list to whom case will be reassigned.	Administrator is shown case number and intended User.
6.	Select the user to which the case needs to be re-assigned.	Select the user from the drop down list of active users.	Only active users will be shown here.
7.	Click on Reassign button	Click on Reassign button available on screen	Admin is redirected to the user management screen and the message prompted "Task has been reassigned to Username"

### 3.6.5. User Interface:

**Step 1:** Click on User Management option available on side navigation

SBP Website Privacy Statement Contact Help hbladmin@techx.com

Search Log out

ONLINE PORTAL

Home Drafts My Tasks My Cases **User Management**

**Initiate New Case**

Department  
Select department

Category  
Select category

Case Type  
Select case type

Case Title  
Select case title

Region  
Select region

Proceed

**Recent Submitted Cases**  
No Case with this Status

**Recent Approved Cases**  
No Case with this Status

**Recent Discrepant Cases**  
Case No : SBPBSCHOK:FEOD-WEBOC-HBL-485  
Dept : Foreign Exchange Date : 1-10-2018  
Operations Department | Category : WEBOC  
View All

**Recent Declined Cases**  
No Case with this Status

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**Step 2:** Click on Task Reassign button

SBP Website Privacy Statement Contact Help demo1.islamabad@bank.com.pk

Search Log out

ONLINE PORTAL

Home Drafts My Tasks My Cases **User Management**

+ Enable User + Create User **+ Task Reassign**

Email	Bank	Action
hbladmin@hbl.com	HBL	Edit Disable
hbluser13@hbl.com	HBL	Edit Disable
hbluser14@hbl.com	HBL	Edit Disable
hbluser15@hbl.com	HBL	Edit Disable
anosh@hbl.com	HBL	Edit Disable
hbluser20@hbl.com	HBL	Edit Disable
hbladmin1@bank.com.pk	HBL	Edit Disable
najeeb110908@sbp.com.pk	HBL	Edit Disable

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**Step 3: Select User whose case(s) needs to be reassigned.**

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Search

Log out

ONLINE PORTAL

Home Drafts My Tasks My Cases User Management

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### Tasks Reassignment

Search

Email	Bank	Action
rushna.nizami@hbl.com	HBL	Reassign
hbladmin@hbl.com	HBL	Reassign
hbluser11@hbl.com	HBL	Reassign
hbluser12@hbl.com	HBL	Reassign
hbluser13@hbl.com	HBL	Reassign
hbluser14@hbl.com	HBL	Reassign
hbluser15@hbl.com	HBL	Reassign
hbluser16@hbl.com	HBL	Reassign
anosh@hbl.com	HBL	Reassign
waseem@hbl.com	HBL	Reassign

**Step 4: Click on Reassign button**

SBP Website Privacy Statement Contact Help demo3.lahore@bank.com.pk

Search

Log out

ONLINE PORTAL

Home Drafts My Tasks My Cases User Management

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### User Reassignment

To: demo1.lahore@bank.com.pk

Search

Select All	Case Number	Department	Category	Status	Created
<input checked="" type="checkbox"/>	SBPBSCHOK-FEOD-WEBOC-HBL-3360	Foreign Exchange Operations	WEBOC	Discrepant	7-01-2019

Reassign

**Step 5: Case has been reassigned successfully**



SBP Website Privacy Statement Contact Help

**Task Assignment**

Task(s) has been assigned to hbladmin@techx.com .

OK

**ONLINE PORTAL**

Home

Drafts

My Tasks

My Cases

User Management

**User Reassignment**

To: hbladmin@techx.com

Select All	Case Number	Department	Category	Status	Created
<input checked="" type="checkbox"/>	SBPBSCHOK-FEOD-WEBOC-HBL-3363	Foreign Exchange Operations	WEBOC	Discrepant	7-01-2019

LOADING...

Reassign

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Waiting for uat-portal.sbp.org.pk...