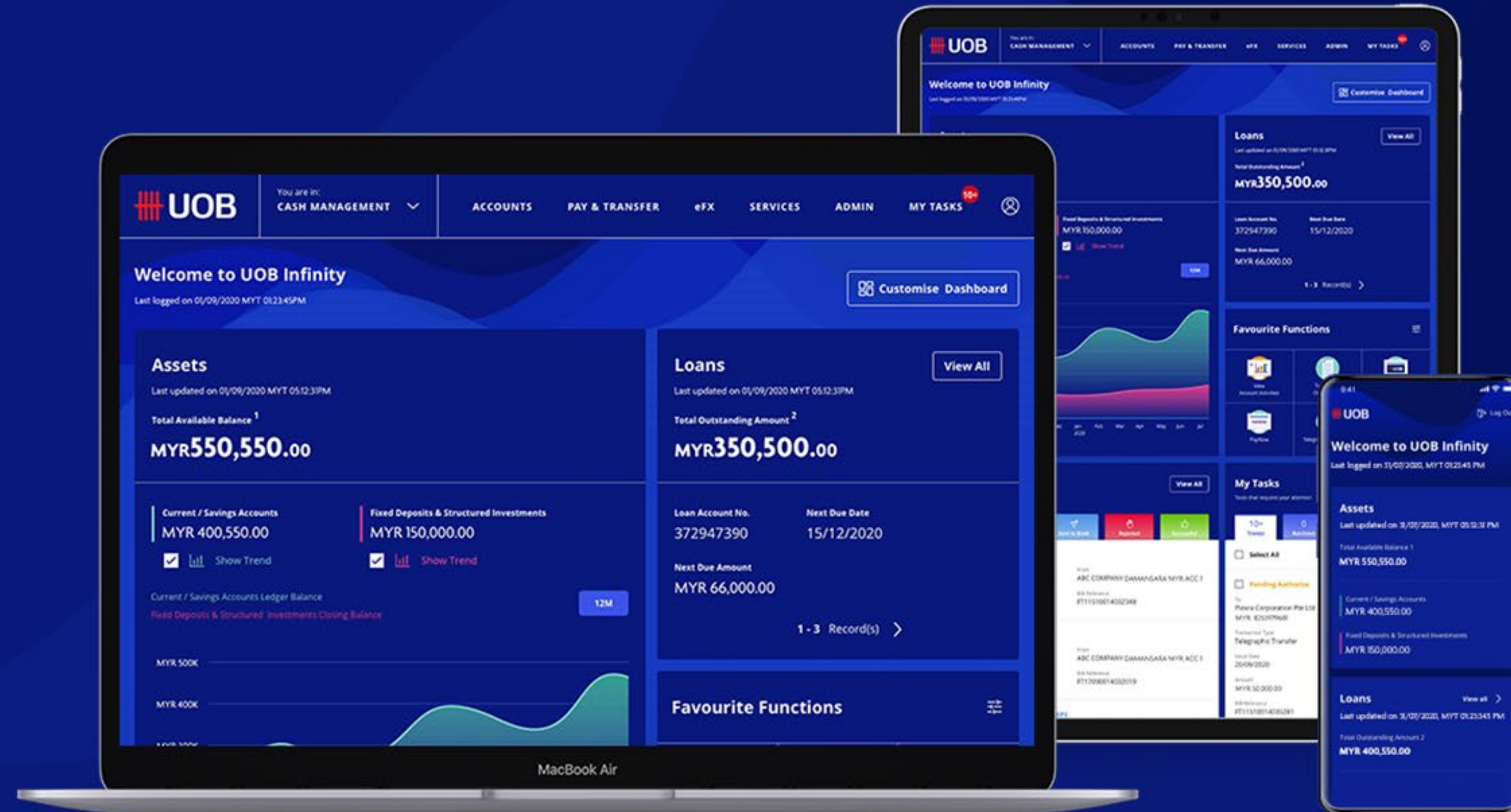


# INFINITY User Guide



# Approval Status

# Approval Status

## Overview

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- 1** How to Access Approval Status
- 2** An Overview of Approval Status
- 3** How to View Transaction Details
- 4** How to View the Audit Trail
- 5** How to Approve Your Transaction via Approval Status
- 6** How to Reject Transaction
- 7** How to Return the Transactions to Maker
- 8** How to Delete Transactions

# *1. How to Access Approval Status*

# How to Access Approval Status

## The Different Entry Points

### Entry point 1

Hover over “Accounts” on the navigation bar and select “Approval Status” (under “Status”).

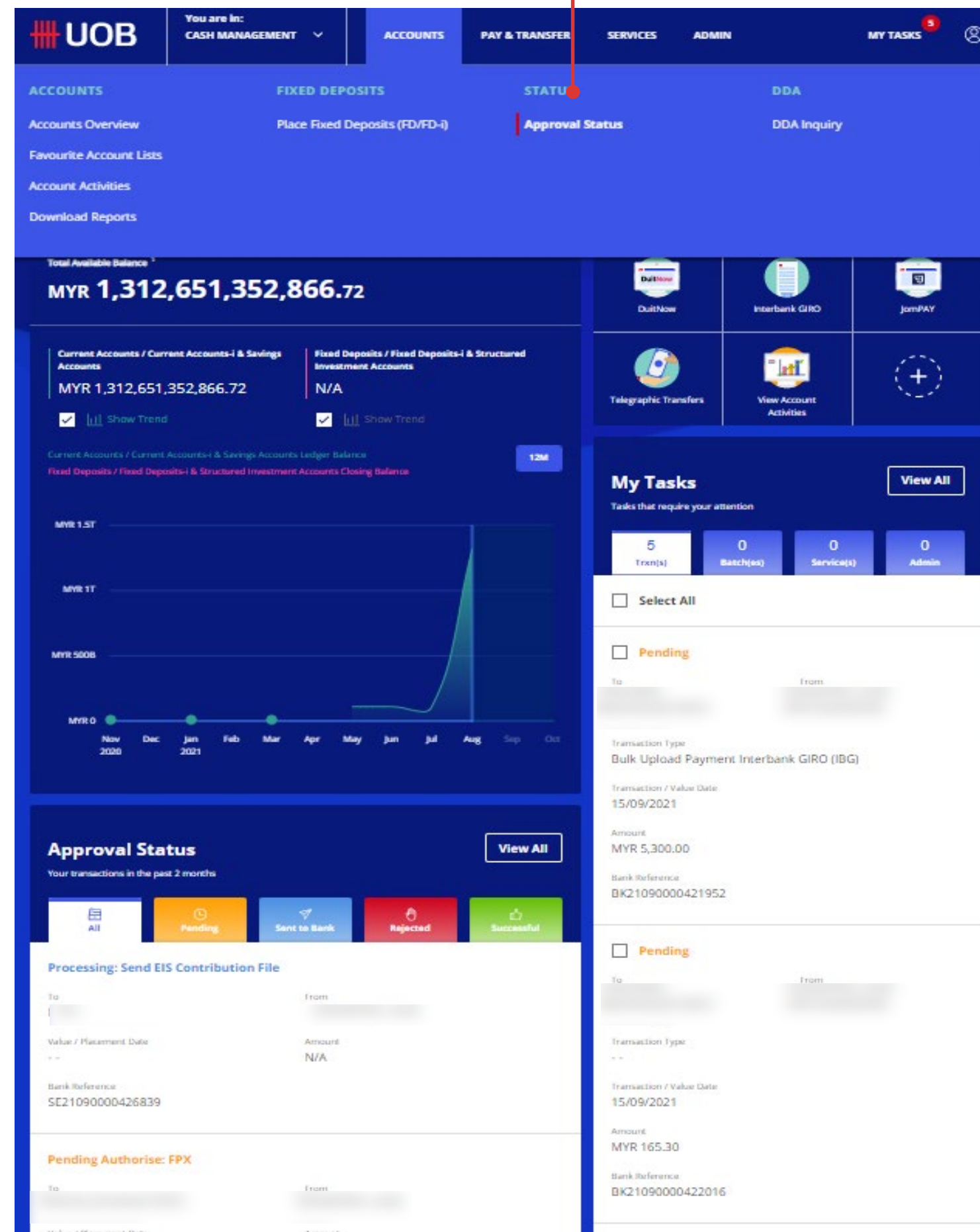
### Entry point 2

Under Dashboard’s Approval Status widget, tap onto “View All”.

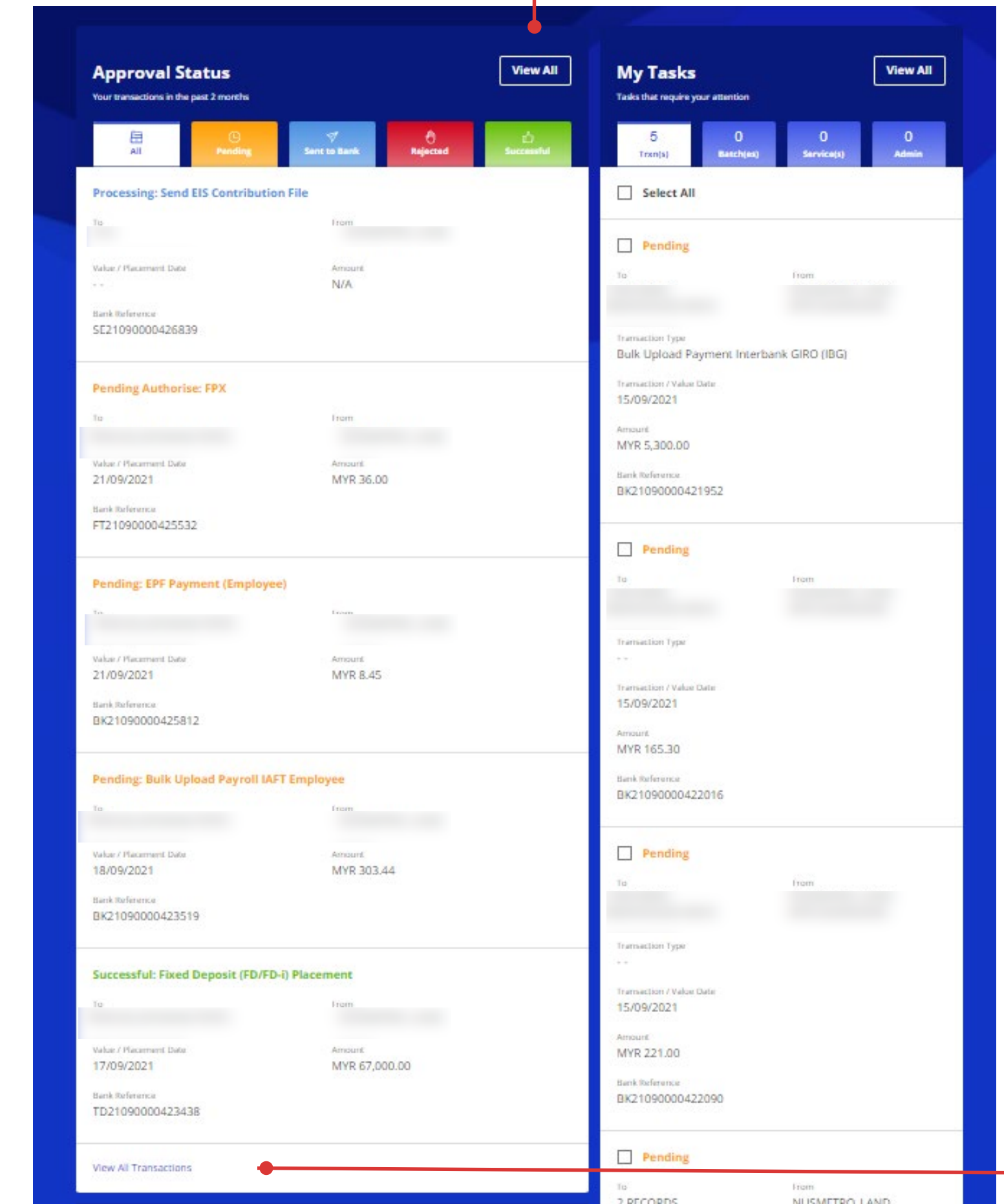
### Entry point 3

Under Dashboard’s Approval Status widget, tap onto “View All Transactions”.

Global Menu (Expanded View)



Approval Status Default View



## *2. An Overview of Approval Status*

# Overview of Approval Status

## Quick Guide

### 1. Tabs Toggle

Click on the tabs to toggle between “All”, “Pending”, “Sent to Bank”, “Rejected” and “Successful” transaction status. The explanation of each status will be explained in the next page.

### 2. Filter Options

You can customise the table’s content to suit your viewing needs by utilising the filter option.

### 3. Sort Options

You can sort the transactions in ascending or descending order using this button.

### 4. Clear Filter(s)

This button will clear existing selected filters.

### 5. Customise View Option

This allows you to customise the display of content type within the table.

### 6. Action

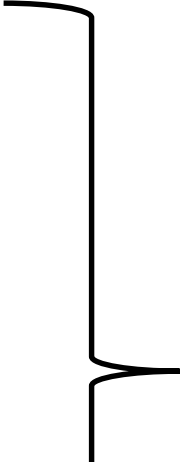
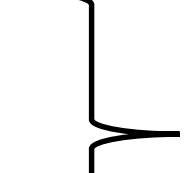
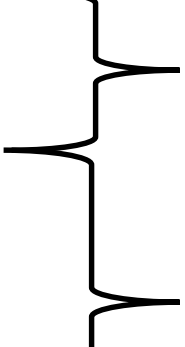
This allows you to view and access actionable options specific to the transaction in view.

### Approval Status (Default View)

The screenshot shows the UOB web interface for 'Approval Status'. At the top, there's a navigation bar with 'UOB' logo, 'You are in: CASH MANAGEMENT', and tabs for 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. A 'MY TASKS 10+' notification and a user profile icon are on the right. Below the navigation bar, the main heading is 'Approval Status' with an 'Export' button. A horizontal bar contains five status tabs: 'All' (1), 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. Below this is a filter bar with buttons for 'Transaction Type', 'Bank Reference', 'Customer Reference', 'Account', 'Currency', 'Amount', and 'Value / Placement Date'. A date range filter is set to 'Application Date: 04/07/2021 - 01/09/2021'. Other filter buttons include 'Payer / Payee', 'Status', and 'Clear Filter(s)' (4). Below the filters, it shows '631 Record(s)' and a note: 'Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.' A 'Customise View' button (5) is on the right. The table below has columns: 'Transaction Type', 'Account', 'Currency', 'Amount', 'Value / Placement Date', 'Payer / Payee', 'Status', and 'Action'. A sample row shows: 'Bulk Upload Payment IFT GPIDE0109800\_s1\_M Y012162A.xml', 'Account', 'MYR', '3,011.00', '01/09/2021', '2 Record(s)', 'Processing', and an action menu (6). A '3' callout points to the 'Currency' column header.

# Overview of Approval Status

## Transaction Status Mapping

UOB Infinity Transaction Status	Description	
Draft	Transaction is SAVED by user	 <b>Pending</b>
Pending Verification	Transaction is SUBMITTED for verification	
Pending Authorisation	Transaction is SUBMITTED for further authorisation according to your authorisation matrix	
Pending Send	Authorised transaction is PENDING RELEASE to the Bank	
Pending Rework	Transaction is RETURNED to Maker for amendment and re-submission	
Processing	Transaction is submitted to the Bank for PROCESSING	 <b>Sent to Bank</b>
Processing	Post-Dated transaction is submitted to the Bank for PROCESSING	
Successful	Transaction has been PROCESSED by the Bank	 <b>Successful</b> <b>Rejected</b>
Rejected	Transaction has been REJECTED by the Bank	
Partial Rejected	One or more records in the bulk transactions is/are rejected.	



# *3. How to View Transaction Details*

# How to View Transaction Details

## All Options

### Option 1

- Click on any part of the desired transaction row.

### Option 2

- Click on the icon under “Action”

### Option 3

- Click on the icon under “Action”, Tap on “View Details”

All end points would be reflected in **(A)** :  
The transaction details will appear in a pop up.

## Export Options

The “Export” button is located at the top right of the transaction details, beside the “Audit Trail” button **(B)**.

You can export a single transaction as:

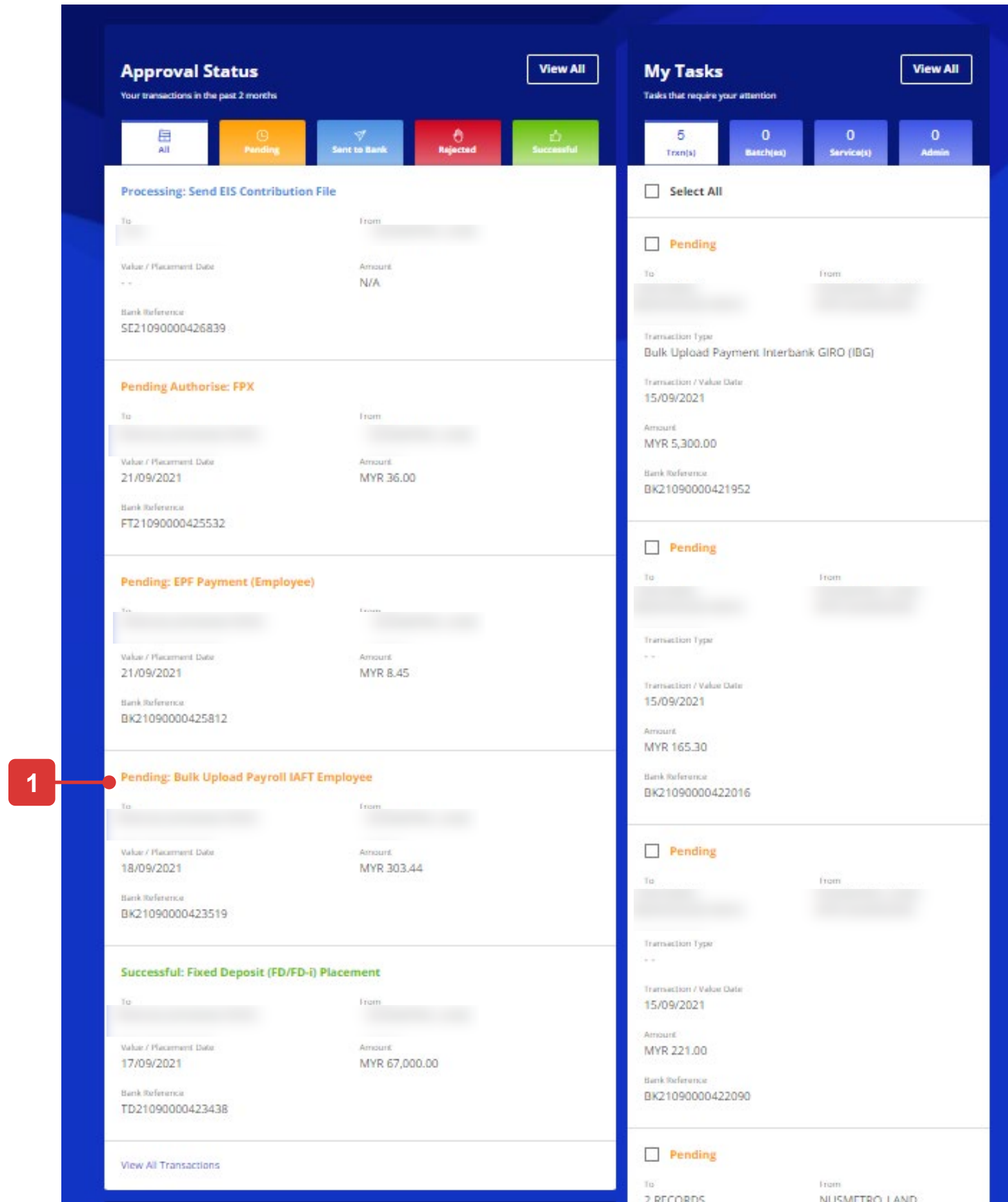
- PDF
- PDF with Audit Trails\*

You can export a bulk transaction as:

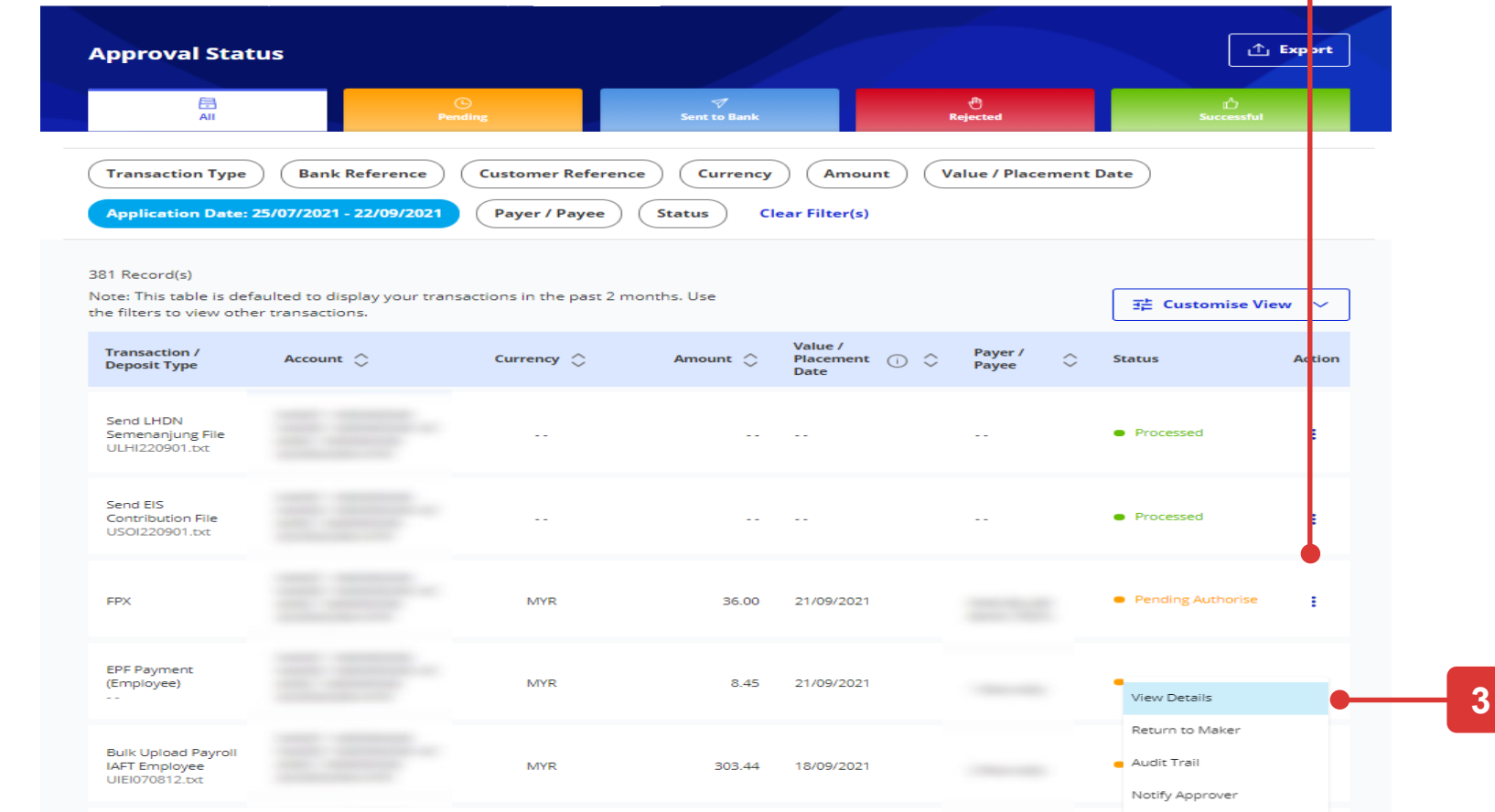
- PDF\*
- PDF with Transaction Details\*
- CSV\*

\*Note: If you select these export options, you will be able to receive an email to notify you once the exported file is ready for download. Once it is ready, you need to go to “Accounts” at the top menu bar, select “Download Reports” and go to “User Generated” tab to download the exported file.

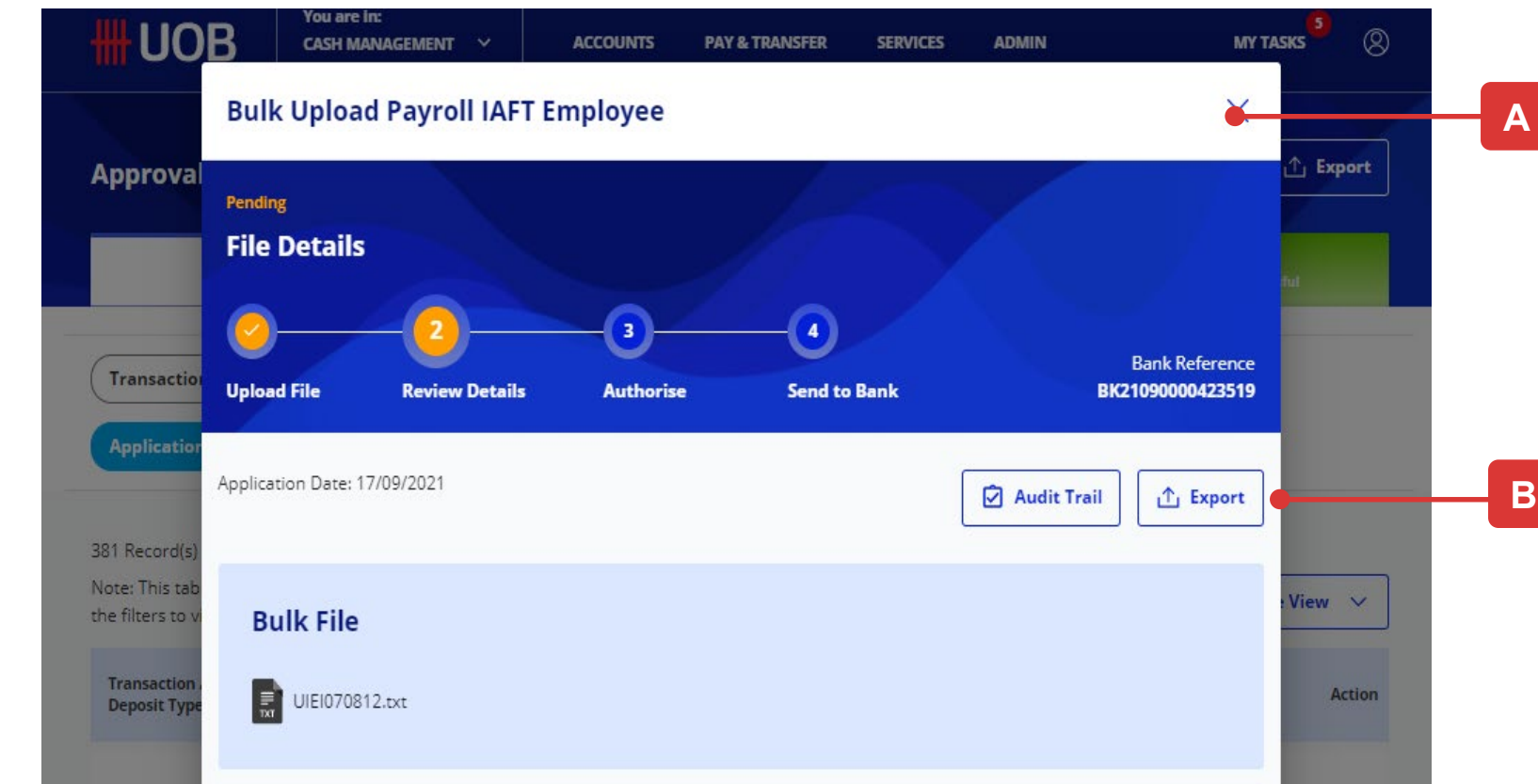
Dashboard (Default View)



Approval Status (Default View)



View Transaction Details



## *4. How to View the Audit Trail*

# How to View the Audit Trail

## All Options

### Option 1

- Click on any part of the desired transaction row.
- Select “Audit Trail” (Reflected in **A**)

### Option 2

- Click on the icon under “Action”
- Tap “Audit Trail” (Reflected in **A**)

All end points would be reflected in **(B)** :  
View your Audit Trail Details that will appear in a pop up.

If your transactions are pending for approval, you will be able to see the next approvers who are able to approve your transactions.

Approval Status (Default View)

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Send LHDN Semananjung File ULM220901.txt						Processed	
Send EIS Contribution File USQ220901.txt						Processed	
FPX		MYR	36.00	21/09/2021		Pending Authorisation	
EPF Payment (Employee)		MYR	8.45	21/09/2021		Pending	
Bulk Upload Payroll IAFI Employee UIE1070812.txt		MYR	303.44	18/09/2021		Pending	View Details Return to Maker <b>Audit Trail</b> Notify Approver
Fixed Deposit (FD/FD-) Placement		MYR	67,000.00	17/09/2021		Processing	
--		MYR	77.00	17/09/2021		Processing	
--		MYR	73.00	17/09/2021		Processing	
--		MYR	81.00	17/09/2021		Processing	
--		MYR	69.00	17/09/2021		Processing	

View Transaction Details

**Bulk Upload Payroll IAFI Employee**

Pending

**File Details**

1 Upload File 2 Review Details 3 Authorise 4 Send to Bank

Bank Reference BK2109000423519

Application Date: 17/09/2021

Audit Trail

**Bulk File**

UIE1070812.txt

View Audit Trail

**Audit Trail**

- ✓ Create  
**Michael Ding**  
17/09/2021 06:28:23 PM +08:00
- ✓ Authorise  
Authorisation Level: A or B  
See Authorisers

# *5. How to Approve Your Transaction (via Approval Status)*

# How to Approve Your Transaction? (via Approval Status)

## Option 1

### Step 1

- Click on any part of the desired transaction row.

### Step 2

Selected transaction summary will appear in a pop up

- Click on the **Approve** button at the bottom of the transaction's summary.

### Approval Status (Default View)

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	
--		MYR	65.30	15/09/2021		Rejected	
--		MYR	45.30	15/09/2021		Successful	
Bulk Upload Payment Interban GIRO (IBG) GPIDE1509115_s1 YD12162A.xml		MYR	5,300.00	15/09/2021		Pending	
DuitNow (DuitNow ID)		MYR	50,000.00	15/09/2021		Pending Authorisation	
DuitNow (DuitNow ID)		MYR	1,000.00	14/09/2021		Pending Authorisation	
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending Authorisation	
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	33,042.00	--		Draft	

1

### View Transaction Details

**From**

Company Name: [Redacted] Account Name: [Redacted]  
Account Number: [Redacted] Currency: MYR

**To**

Payee's account details

DuitNow ID Type: [Redacted] DuitNow ID: [Redacted]  
Passport Number: [Redacted]  
Payer's Nickname: UAT015  
Issuing Country: Malaysia  
Pre-Approved Payee  
Payee Residence Status: Resident

**Amount & When**

Transfer Date: 15/09/2021  
Transaction Currency: MYR Transaction Amount: 50,000.00  
Charges: 0.00  
Recipient Reference: LKH

Buttons: Cancel, Return, Approve

2

# How to Approve Your Transaction? (via Approval Status)

## Option 2

### Step 1

- Click on the icon under “Action” menu.
- Tap on “Approve” in the expanded menu

### Step 2

- Follow the on-screen instructions to authorise the request.

### Approval Status (Default View)

**Approval Status** [Export]

Transaction Type Bank Reference Customer Reference Currency Amount Value / Placement Date

Application Date: 25/07/2021 - 22/09/2021 Payer / Payee Status Clear Filter(s)

381 Record(s)  
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions. [Customise View]

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	
...		MYR	65.30	15/09/2021		Rejected	
...		MYR	45.30	15/09/2021		Successful	
Bulk Upload Payments Interban GIRO (IBG) GPIDE1509115_s1 Y012162A.xml		MYR	5,300.00	15/09/2021		Pending	
DuitNow (DuitNov ID)		MYR	50,000.00	15/09/2021		Pending	View Details Approve Return Audit Trail
DuitNow (DuitNov ID)		MYR	1,000.00	14/09/2021		Pending	
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending	
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	33,042.00	...		Draft	

### Token Response

**Enter Token Response** [Close]

Follow these steps on your token:

- 1 Press **1**
- 2 Enter **2022** & press **OK**
- 3 Enter **1013 3010** & press **OK**
- 4 Enter the **6-digit security code** on your token

Token Response

[ ] [ ] [ ] [ ] [ ] [ ]

By clicking 'Submit', you are deemed to have read and agreed to the [Terms & Conditions](#) of the respective product(s) and / or service(s).

[Cancel] [Submit]

1

2

## *6. How to Reject Transaction*




# How to Reject Transaction

## Option 1

### Step 1

- Click anywhere within the desired transaction row.

### Step 2

- Tap on  button at the bottom of the transaction summary.

### Approval Status (Default View)

The screenshot shows the 'Approval Status' interface. At the top, there are tabs for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. Below the tabs are filter buttons for 'Transaction Type', 'Bank Reference', 'Customer Reference', 'Currency', 'Amount', and 'Value / Placement Date'. There is also a date range filter for 'Application Date: 25/07/2021 - 22/09/2021' and buttons for 'Payer / Payee', 'Status', and 'Clear Filter(s)'. An 'Export' button is in the top right. The main area displays a table with 381 records. The table has columns for 'Transaction / Deposit Type', 'Account', 'Currency', 'Amount', 'Value / Placement Date', 'Payer / Payee', 'Status', and 'Action'. A red arrow points to the 'Rejected' status in the table.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	
--		MYR	65.30	15/09/2021		Rejected	
--		MYR	45.30	15/09/2021		Successful	
Bulk Upload Payment Interban GIRO (IBG) GPIDE1509115_s1 YD12162A.xml		MYR	5,300.00	15/09/2021		Pending	
DuitNow (DuitNow ID)		MYR	50,000.00	15/09/2021		Pending Authorisation	
DuitNow (DuitNow ID)		MYR	1,000.00	14/09/2021		Pending Authorisation	
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending Authorisation	
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	33,042.00	--		Draft	

### View Transaction Details

The screenshot shows the 'View Transaction Details' interface. It is divided into three main sections: 'From', 'To', and 'Amount & When'. The 'From' section includes fields for Company Name, Account Number, and Currency (MYR). The 'To' section includes fields for Payee's account details, DuitNow ID Type, Passport Number, Payer's Nickname (UAT015), Issuing Country (Malaysia), Pre-Approved Payee, and Payee Residence Status (Resident). The 'Amount & When' section includes fields for Transfer Date (15/09/2021), Transaction Currency (MYR), Transaction Amount (50,000.00), Charges (0.00), and Recipient Reference (DXT). At the bottom, there are four buttons: 'Cancel', 'Return', 'Reject', and 'Approve'. A red arrow points to the 'Reject' button.

1

2

# How to Reject Transaction

## Option 2

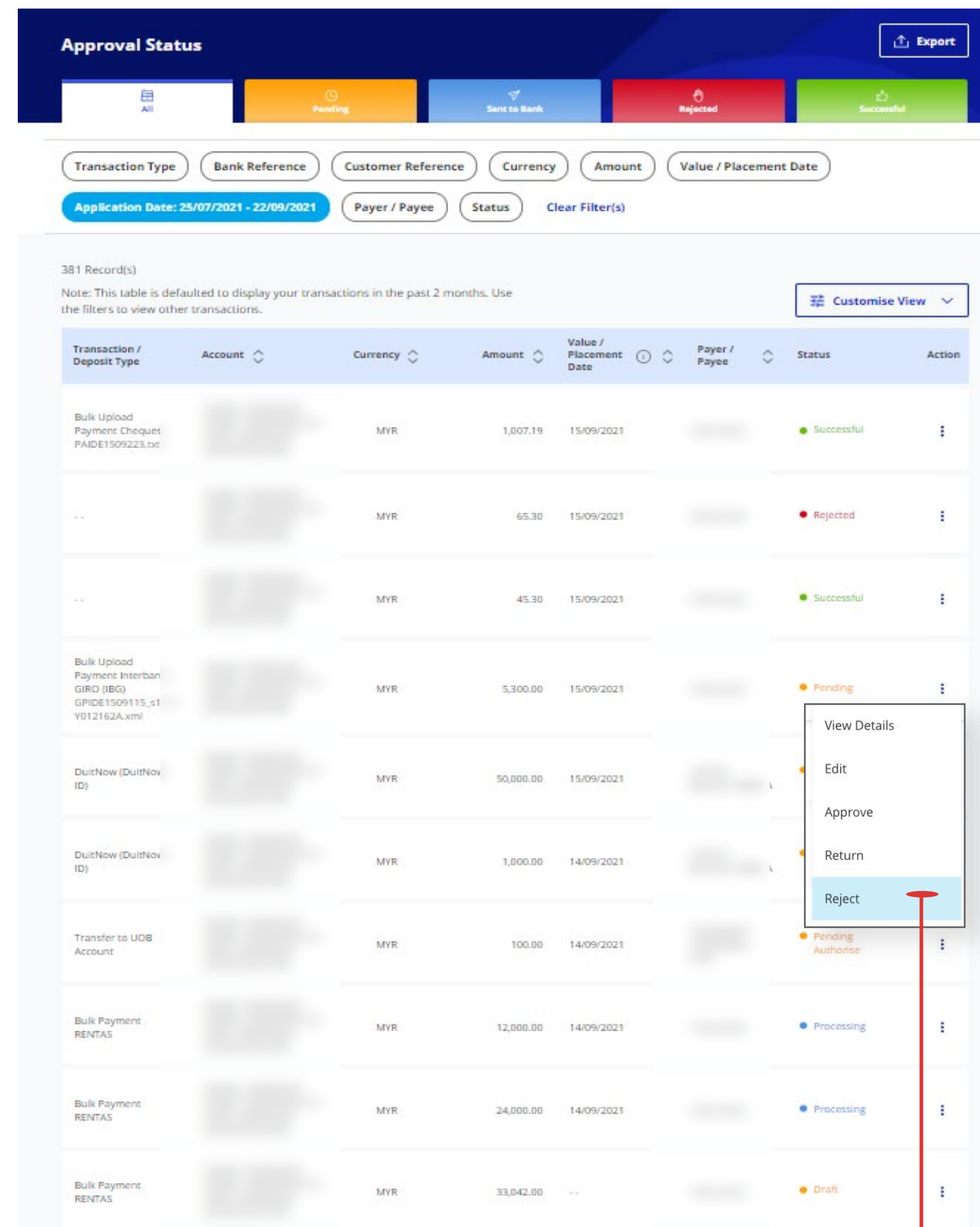
### Step 1

- Click on the icon under “Action” menu.
- Tap on “Reject” button in the expanded menu

### Step 2

- Click on  in the dialog box.

### Approval Status (Default View)



The screenshot shows the 'Approval Status' interface with a table of transactions. The table has columns for Transaction / Deposit Type, Account, Currency, Amount, Value / Placement Date, Payer / Payee, Status, and Action. A red box highlights the 'Reject' option in the action menu for a transaction with a 'Pending' status.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	⋮
--		MYR	65.30	15/09/2021		Rejected	⋮
--		MYR	45.30	15/09/2021		Successful	⋮
Bulk Upload Payment Interban GIRO (IBG) GPIDE1509115_s1 YD12162A.xml		MYR	5,300.00	15/09/2021		Pending	⋮
DuitNow (DuitNow ID)		MYR	50,000.00	15/09/2021		Pending	⋮
DuitNow (DuitNow ID)		MYR	1,000.00	14/09/2021		Pending	⋮
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending Authorise	⋮
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	⋮
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	⋮
Bulk Payment RENTAS		MYR	33,042.00	---		Draft	⋮

### Reject Transaction Modal



The screenshot shows a modal dialog box titled 'Reject Transaction'. It contains the question 'Are you sure you want to reject this item?' and two buttons: 'Cancel' and 'Yes'. A red line points from the 'Yes' button to a red box with the number '2'.

1

# *7. How to Return the Transactions to Maker*

# How to Return the Transaction to Maker

## Option 1

### Step 1

- Click anywhere within the desired transaction row.

### Step 2

- Tap on **Return to Maker** button at the bottom of the transaction summary.

### Step 3

- Status will be shown as as "Pending Rework".

### Approval Status (Default View)

The screenshot shows the 'Approval Status' interface with a table of transactions. The table has columns for Transaction / Deposit Type, Account, Currency, Amount, Value / Placement Date, Payer / Payee, Status, and Action. A red arrow labeled '1' points to the 'Pending Rework' status in the table.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Send LHDN Semenanjung File ULH220901.txt						Processed	
Send B5 Contribution File USD220901.txt						Processed	
...		MYR	140.00	23/09/2021		Processing	
FPX		MYR	36.00	21/09/2021		Pending Authorise	
EPF Payment (Employee)		MYR	8.45	21/09/2021		Pending	
Bulk Upload Payroll IAFI Employee UIE1070812.txt		MYR	303.44	18/09/2021		Pending	
Fixed Deposit (FD/FD-) Placemen		MYR	67,000.00	17/09/2021		Successful	
...		MYR	77.00	17/09/2021		Processing	
...		MYR	73.00	17/09/2021		Processing	
...		MYR	81.00	17/09/2021		Processing	

### View Transaction Details

The screenshot shows the 'View Transaction Details' interface. It includes sections for 'From' (Company Name, Account No., Currency), 'To' (Payroll Type, Employee), 'Bulk Transaction Summary' (No. of Transactions, Highest Amount, Total Amount), 'Transaction Type & Date' (View Standard Transaction Fees, Bulk Upload Payroll IAFI Employee, Transaction Date), and 'Bulk References'. A red arrow labeled '2' points to the 'Return to Maker' button at the bottom.

This is a close-up of the transaction table from the 'Approval Status' interface. It shows a transaction with the status 'Pending Rework'. A red arrow labeled '3' points to this status.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Telegraphic Transfer UTP030801.txt	2023032394 MYR	SGD	47,000.00	04/08/2021	2 Record(s)	Pending Rework	

# How to Return the Transaction to Maker

## Option 2

### Step 1

- Click on the icon under “Action” menu
- Tap on “Return to Maker” in the expanded menu

### Step 2

- Click on  button in the dialog box.

### Approval Status (Default View)

Approval Status (Default View)

Transaction Type Bank Reference Customer Reference Currency Amount Value / Placement Date

Application Date: 26/07/2021 - 23/09/2021 Payer / Payee Status Clear Filter(s)

382 Record(s)  
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Send LHDN Semenanjung File ULHI220901.txt						Processed	
Send EIS Contribution File USQI220901.txt						Processed	
...		MYR	140.00	23/09/2021		Processing	
FPX		MYR	36.00	21/09/2021		Pending Authorize	
EPF Payment (Employee)		MYR	8.45	21/09/2021		Pending	
Bulk Upload Payroll IAFI Employee UIEI070812.txt		MYR	303.44	18/09/2021		Pending	View Details Return to Maker Audit Trail Notify Approver
Fixed Deposit (FD/FD-) Placement		MYR	67,000.00	17/09/2021		Processing	
...		MYR	77.00	17/09/2021		Processing	
...		MYR	73.00	17/09/2021		Processing	
...		MYR	81.00	17/09/2021		Processing	

### Return Transaction Modal

#### Return Bulk Upload Payroll IAFI Employee

Are you sure you want to return this Bulk Upload Payroll IAFI Employee to the maker?

Add comments for return \*

Cancel

Submit

2

1

# *8. How to Delete Transactions*

# How to Delete Transactions

## Single Deletion Method

### Step 1

- Click on the icon under “Action” menu.
- Tap on “Delete”

### Step 2

- Click  in the modal to delete transaction.

### Approval Status (Default View)

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Payment RENTAS		MYR	33,042.00	--	3 Record(s)	Draft	⋮
Bulk Telegraphic Transfer		SGD	90.70	--	2 Record(s)	Draft	⋮
Bulk Payment Transfer to UOB Account		MYR	9,999.00	16/08/2021	1 Record(s)	Draft	⋮

### Delete Bulk Transaction Modal

**Delete Draft / Pending Rework**

Are you sure you want to only delete this record?

## Multiple Deletion Method


### Step 1

- Click on the icon under “Action” menu.
- Tap on “Delete”

### Step 2

- Click  in the modal to delete transaction.

### Step 3

- There will be a new column with checkboxes for users to tick which transactions to be deleted. Click  to confirm the deletion.

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

<input type="checkbox"/>	Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status
<input checked="" type="checkbox"/>	Bulk Payment RENTAS		MYR	33,042.00	--	3 Record(s)	Draft
<input checked="" type="checkbox"/>	Bulk Telegraphic Transfer		SGD	90.70	--	2 Record(s)	Draft
<input checked="" type="checkbox"/>	Bulk Payment Transfer to UOB Account		MYR	9,999.00	16/08/2021	1 Record(s)	Draft
<input type="checkbox"/>	Bulk Payroll DuitNow (DuitNow ID)		MYR	224.89	--	1 Record(s)	Draft
<input type="checkbox"/>	Bulk Payroll DuitNow (DuitNow ID)		MYR	--	--	0 Record(s)	Draft

1 - 5 of 5 Record(s)



**Right By You**