

Oracle FLEXCUBE Process Framework User Guide

Oracle FLEXCUBE Universal Banking

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1.1 Introduction

This manual helps you get acquainted with the Process Framework module of Oracle FLEXCUBE Universal Banking system. This manual explains the basic design of Oracle the process framework and the common operations that you will follow while using it.

1.2 Audience

This manual is intended for the back-end and front-end staff who setup/use Oracle FLEXCUBE Universal Banking process framework.

1.3 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

1.4 Abbreviations

The following abbreviations are used in this User Manual:

Abbreviation	Description
BPEL	Business Process Execution Language
WF	Workflow

1.5 Organization

This manual is organized as follows:





Chapter 1	<i>Preface</i> gives information on the intended audience. It also lists the various chapters covered in this User Manual.
Chapter 2	<i>Getting Started with Oracle FLEXCUBE Process Framework</i> explains the features of Oracle FLEXCUBE process framework accessible from the landing page.
Chapter 3	<i>Origination Dashboards</i> provides the details of origination dashboards in Oracle FLEXCUBE system.
Chapter 4	<i>Configurations</i> explains the methods to configure Queues, Landing and Sub-stages to suit your bank's requirements.
Chapter 5	Function ID Glossary contains the function IDs mentioned in this user manual.

1.6 Related Documents

- Security Management System user manual
- Procedures user manual

1.7 Glossary of Icons

This User Manual may refer to all or some of the following icons:

Icons	Function
	Exit
	Add row
	Delete row
	Option List

2. Getting Started with Oracle FLEXCUBE Process Framework

2.1 Introduction

This chapter explains the features of Oracle FLEXCUBE process framework accessible from the landing page.

Each transaction in workflow can be configured as a process. At certain points in a process, input from the user-end is required. The input could be in the form of data to initiate or enrich a transaction or to authorize an existing transaction. To facilitate this, human tasks are generated by the workflow engine as and when required during the process. These human tasks are associated with a Function ID. When a user initiates a task, the different user roles associated to the Function ID are assigned to the task.

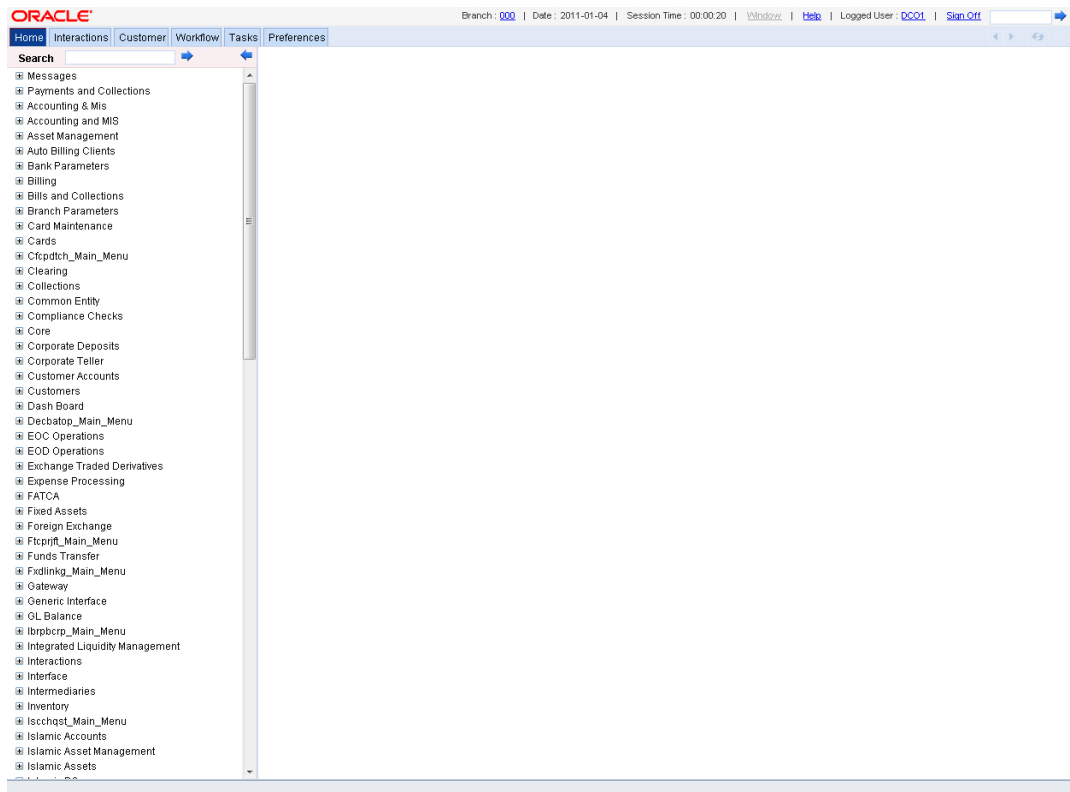
Also, each process (transaction) passes through the workflow layer in stages. Access to each stage is restricted to users who have the requisite rights. Once a task has been initiated or completed for a particular stage, it is placed in the relevant queue or task list (explained later). To proceed further with the process, a user - with relevant rights - needs to acquire it under his/her user ID.

Note

Oracle FLEXCUBE supports the co-existence of multiple composite versions of BPMN (Business Process Models and Notations) and BPEL process models. In BPMN processes, you can query the first task of a process by querying with the conversation id. You can customise the BPMN process using the BPM Composer.

2.2 Tasks

When you log into the application, the Landing Page, as shown below, is displayed:-



The following options are available to you in this screen:

- Menu
- Interactions
- Customer
- Workflow
- Tasks
- Preferences

Select 'Tasks' tab to view the tasks.

The screenshot shows the Oracle Tasks page. The top navigation bar includes links for Home, Interactions, Customer, Workflow, Tasks, and Preferences. The 'Tasks' tab is selected. The sidebar on the left contains a search bar, a list of tasks (including Origination, Dashboard, Acceptance/Confirmation, Application Verification, Document Verification, Know Your Customer, Lending Approval, My Personalizations, Productivity of the Day, Standard, Underwriting, demo_1, demo_ap, Queue, Search, Administrative, Application Statuses Across Various Parameters, Applications, Count Across Conventional High 1, Count Across Conventional Low, Count Across Conventional Medium, and Queue View), and a Summary Dash Board. The Summary Dash Board is expanded, showing a table with Queue Name and Count.

Queue Name	Count
Initiated	0
Reviewed	0
Processed	0
Cancelled	0
Approved	0
Funded	0

You have the following options under tasks:

- Quick Search
- Application
- Dashboard
- Queue
- Quick View

2.2.1 Quick Search

If you know the application number, you can quickly search for an application using the quick search feature.

The screenshot displays the Oracle Quick Search interface. On the left, there is a sidebar with a search bar and a list of application categories. The main area shows a table of search results with columns for Workflow Reference, Transaction Reference, Title, Assignee Users, Customer Name, Creation Date, Priority, Channel, Originated By, and Status.

Workflow Reference	Transaction Reference	Title	Assignee Users	Customer Name	Creation Date	Priority	Channel	Originated By	Status
OpenSavingsAccount2683		Receive And Verify		FAIZY1	2013-06-22 12:12:46 IST	Low			RECVNMF
OpenSavingsAccount2735		Input savings account details			2013-06-24 16:07:02 IST	Low			RECVNMF
RetailLending2836		Loan Approval	Abel		2013-06-28 10:33:50 IST	Low			UNAPPR
RetailLending2837		Loan Approval	Abel		2013-06-28 10:47:36 IST	Low			UNAPPR
OpenSavingsAccount2883		Input savings account details		ORDLEADM11	2013-06-29 13:15:10 IST	Low	Internet	35258AA	INPUTDTL

Specify the application number and click the adjoining search button. You can also specify a part of the application number. If the application number of any record has the number you have specified as a part of it, then the system will fetch that record.

Click any record to view the details.

2.2.2 Application

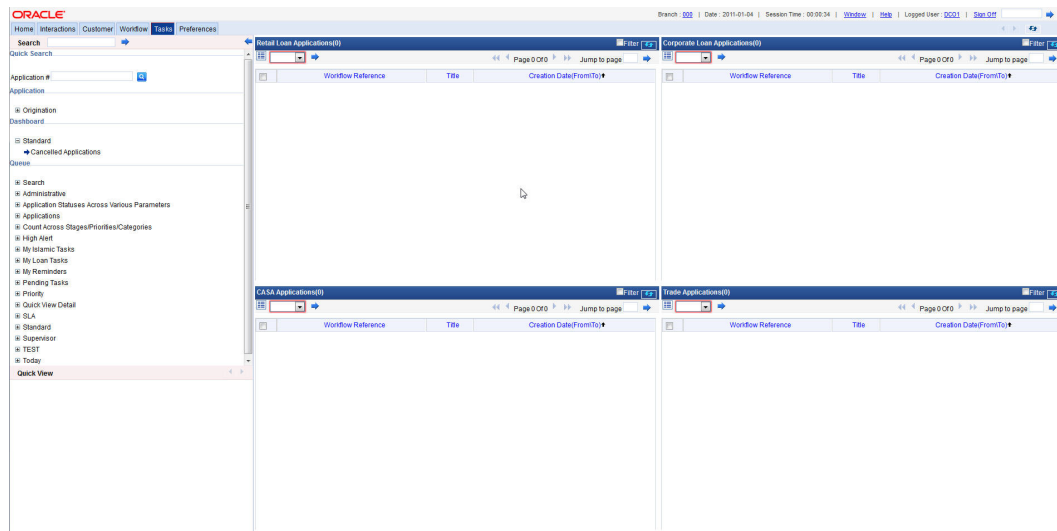
Under 'Application' section, you can view the menu to access the Oracle FLEXCUBE Origination screens.

The screenshot shows the Oracle Application menu. It includes a search bar and a list of application categories. The 'Application' section is expanded, showing a list of menu items: Origination, Maintenance, Operations, Reports, Templates, and View.

You can expand the menu items and invoke the Origination screens.

2.2.3 Dashboard

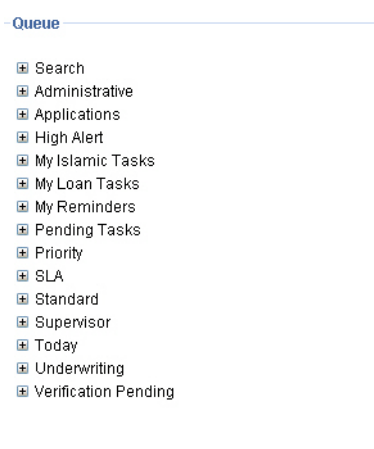
Under 'Dashboard' section, you can view the list of the maintained and configured dashboards along with the default dashboards.



You can expand the menu items and invoke the dashboards.

2.2.4 Queue

The 'Queue' menu displays the tasks under various queues. You can expand the menu and view the number of tasks under each queue.



If you select 'Search' and then click 'All', the 'Task List - Search' window will be displayed on the right hand side.

Task List - Search					
Workflow Reference	=		Customer Name	=	
Transaction Reference	=		Creation Date(FromTo)	=	
Title	=		Priority	=	
Assignee Group	=		Channel	=	
Originated By	=		Reminder	=	
Status	=		Currency	=	
Comments	=				
Amount	=				

Search

Here you need to input value for querying on the tasks. You can provide values for any or all of the following criteria:

- Work Reference
- Transaction Reference
- Title
- Assignee Group
- Assignee Users
- Customer Name
- Creation Date (From\To)
- Priority
- Channel – Channel from which the origination is initiated. In the search criteria, you can specify values available in 'COTMSOURCE' table of the 'Channel' field. These values are displayed in the 'Originated By' field of all stages of workflow.
- Originated By – Originator of the workflow
- Status – Status of the origination
- Comments

Click 'Search' button to initiate the query. Based on the details specified, the system will display all tasks satisfying the search criteria.

If you select 'Standard View', the system will display the number of records available in each of the task queues viz. 'Acquired', 'Assigned', 'Completed', 'Pending' and 'Supervisor'. Click the links to view the respective details in the right pane.

The Pending List displays tasks which are not yet acquired by anyone. On acquiring, the task goes to the Assigned List. From the Assigned List, you can capture the task and input the action. Then the transaction goes to Completed stage.

The following queues are available on this screen:

- Standard - this is the standard queue, which displays acquired, assigned, pending and completed applications
- Administrative - this queue displays the list of staled applications
- Applications - this queue lists the applications in each process
- Priority - this queue lists the applications with respect to their priority
- SLA - this queue lists the aging and expired applications
- Supervisor - this queue displays the applications escalated by the sub-ordinates and the list of acquired tasks

2.2.4.1 Operations under Standard Queue

The workflow actions that you can perform for a task are:

Acquire/Release

After a task is assigned to a group, you, as a user, can further process the task only if you acquire it. Select the transaction and click 'Acquire' button. The task will then be moved from the group queue to your task list. You can release the task that has already been acquired by clicking 'Release' button..

Reassign

A task can be re-assigned only by a supervisor to any of his subordinates. If you have the requisite rights, you can select the transaction and click 'Reassign' button in your task list. This is done when a contract is transferred from the maker of the contract to another user for further operations.

Resume

A task that has been suspended can be resumed when you click the 'Resume' button in your task list. You can then continue with the suspended task.

The system also gives you the option of carrying out the same action on many tasks simultaneously. To do this, you are required to select all the tasks that you want, by checking the box at the beginning of each row. The operations common to all the tasks are listed at the top of the Task Pane. You can select the appropriate one. The chosen action will be implemented for all the selected tasks. For example, after choosing the tasks that you require, you can acquire all of them in bulk (if the 'Acquire' operation is allowed for all the tasks).

Copy

A selected task can be copied by clicking on 'Copy' button in your task list. You can assign a task only if the task is assigned to your user role/ID.

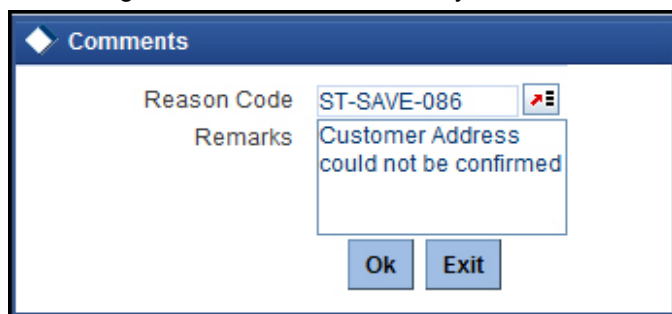
Escalate

System allows you to escalate a task to a supervisor or a higher authority. Follows are the types of escalations:

- Auto Escalation - When a task remains acquired yet un-attended at the end of the specified time span, system automatically escalates the task to the user's supervisor. If the supervisor does not take any action for the same time period, then system escalates the task to the second level in the hierarchy. This process goes on for a per-defined number of levels.
- Manual Escalation - In case a task requires an action from a higher authority, you can manually escalate a task to the user's supervisor by clicking the 'Escalate' button in the task list.

A task can be escalated only if it is acquired.

On clicking the 'Escalate' button, the system invokes the 'Comments' screen.



The system prompts to enter the following details:

Reason Code

Select the reason code from the adjoining option list. This list displays all valid reason codes maintained as 'Common'.

Remarks

Specify the reason for escalation here.

On escalation, the task appears under the 'Escalated' option in the Supervisor queue. When the supervisor opens the escalated task, system displays the reason of escalation and remarks as an information message.

2.2.4.2 Opening Multiple Queues

You can open multiple queues as tabs and perform the required tasks in each queue.

The screenshot displays the Oracle Supervisor Queue interface. On the left is a sidebar menu with categories like Search, Administrative, Application Statuses, Applications, Count Across, High Alert, My Escalated Applications, My Islamic Tasks, My Loan Tasks, My Reminders, Pending Tasks, Priority, Quick View Detail, SLA, Standard, Supervisor, TEST, and Today. The main area shows a 'Low Task List' with columns: Workflow Reference, Transaction Reference, Title, Assignee Users, Customer Name, Creation Date, Priority, Channel, Originated By, and Status. A 'Filters' section at the top allows for searching by Workflow Reference, Transaction Reference, Title, Assignee Users, Customer Name, Creation Date, Priority, Channel, and Status. Below the task list, there are tabs for History, Interactions, Documents, and Advices.

Check the 'Apply Filters' box for a detailed search in a particular task in the queue. System displays the following tabs in each queue:

- History
- Interactions
- Documents
- Advices

History

Under the 'History' tab, system displays the audit trail for the selected task.

History	Interactions	Documents	Advices						
Title	Action Time	Pick Up Time	User ID	User Name	Action Code	Action Description	Branch	Remarks	View
Receive And Verify	Wed Aug 28 20:39:43 IST 2013	Wed Aug 28 20:38:42 IST 2013	fcatorp	FCATOP	PROCEED	PROCEED	002		View
Approve Account Opening	Thu Aug 29 12:03:31 IST 2013	Wed Aug 28 20:39:46 IST 2013	m23403	Venkat Maker	APPROVE	APPROVE	002		View
Input savings account details	Thu Aug 29 12:05:04 IST 2013	Thu Aug 29 12:03:31 IST 2013	m23403	Venkat Maker	PROCEED	PROCEED	002		View
Verify savings account details	Thu Aug 29 12:05:21 IST 2013	Thu Aug 29 12:05:04 IST 2013	m23403	Venkat Maker	APPROVED	APPROVED	002		View

Click the 'View' button to view the corresponding task screen.

Interactions

Under the 'Interactions' tab, system displays the customer interactions captured for a particular Application.

History	Interactions	Documents	Advices
Conversation ID			
Customer ID			
Conversation Date			
Subject			
Original Request			
Customer Reply			
Details			

System displays the relevant details for the selected task in the queue.

Documents

Under the 'Documents' tab, you can view the documents maintained for a particular task at each stage.

History	Interactions	Documents	Advices		
Title	Category	Document Ref No	Document Type	Remarks	View

Click the 'View' button to view the relevant documents for the selected task in the queue.

Advices

Under the 'Advices' tab, you can view the advices generated for a particular task at each stage.

History	Interactions	Documents	Advices		
Title	Report Description	Report Name	Document Name	Document Ref No	View

System displays the advices for the selected task in the queue.

Click the 'View' button to view the advices generated for a particular task.

2.2.5 Scheduling Acquired Tasks

Oracle FLEXCUBE allows you to schedule you acquired tasks for a specific day/time based on your work structure, by setting reminders for the acquired tasks in your task list.

Acquired-Task List								
Acquire Release Resume Renew Reassign Escalate Copy Stage Status Page 1 Of 1 Jump to page Go								
	Workflow Reference	Transaction Reference	Title	Assignee Group	Customer Name	Amount	Creation Date(FromTo)	Priority
<input checked="" type="checkbox"/>	aka7093		LoanApproval	ALLROLES-001,ORIG-ROLE-001,ROLESCM-001			2012-10-26 10:50:33 IST	Low
<input type="checkbox"/>	ahAccount7115		IslamicMudarabahAccount	ALLROLES-000,ROLESCE-000,ROLESCM-000			2012-10-26 18:03:03 IST	
<input type="checkbox"/>	CreateCorporateCustomer7382		Input Basic Details	ALLROLES-000,CORMROLE-000,CRMROLE-000			2012-11-12 17:47:46 IST	

You can set a reminder by clicking the Reminder button for a task. System displays the following list of activities in the drop-down list:

- Highlight Task - Select this option to highlight the task.
- Set Reminder - Select this option to schedule a reminder. On selecting this option, system invokes the 'Reminder' screen. In this screen, you can select the reminder date, time and remarks. Depending on the scheduled reminder time, system automatically sets the flag colour.

In case a reminder has already been set for a task, on clicking the reminder flag, you will get the following options:

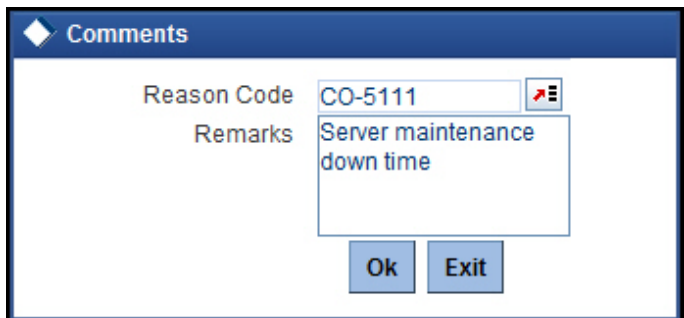
- View Reminder - Select this option to view the set reminders at any point of time. On selecting this option, system displays an information message with the reminder date or time and the remarks provided.
- Reset Reminder - Select this option to change/reset an existing reminder with a new date, time and remarks.
- Dismiss Reminder - Select this option to dismiss a reminder.

On setting a reminder, system sets the reminder flag for the task. Reminder flags are colour-coded to differentiate between time-spaced and time-barred tasks. When a task crosses the scheduled reminder date or time, the flag turns from green to red (tasks which that not cross the scheduled date or time will have green flags). At any point of time, you can view the reminder date, time and remarks, if any.

System allows you to set reminders for multiple tasks together. Select the tasks for which you want to set reminders and then select the appropriate option.

2.2.6 Holding a Task

You can hold a task from processing using 'Hold' button. When you withhold a task for some purpose, you can add a comment stating the reason for holding the task.



Specify the reason code for holding the task.

When you pick up the held task again from the 'Pending' queue, the system will remind you of the hold and display the reason and remarks as an information message.

2.2.7 Quick View

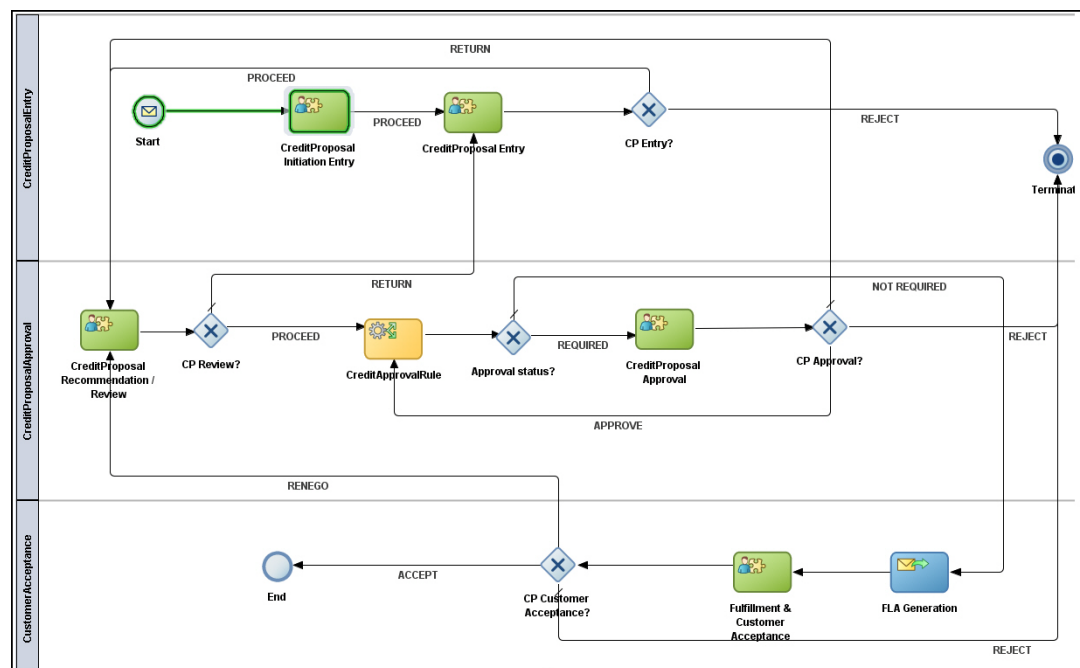
You can view the configured quick access dashboards in the Quick View. This frame consists of crisp and precise task-related information.

Quick View	
Application Monitor	
Queue Name	Count
RetailLoans	23
CorporateLoans	49
IslamicLoans	0
Trade	0
CASA	26

You can configure a dashboard for quick access by checking the 'Default' box in the 'Origination Dashboard Role Maintenance' screen.

2.3 Viewing Stage Status

In BPMN processes, the system allows you to view the flow diagram and the current stage of a particular task. On clicking the 'Stage Status' button in the task list, system displays the flow diagram, for the selected task, in a separate window.



Note

System supports the Stage Status image only for BPMN Processes.

3. Origination Dashboards

3.1 Maintenances

3.1.1 Maintaining Origination Dashboard Details

You can maintain dashboard related information using the 'Origination Dashboard Maintenance' screen. You can invoke this screen by typing 'ORDDSHMT' in the field at the top right corner of the Application tool bar and clicking the adjoining arrow button.

The screenshot shows the 'Origination Dashboard Maintenance' window. It includes a 'Save' button at the top left. The main area contains four input fields: 'Dashboard Id *', 'Main Menu *', 'Dashboard Description', and 'Language Code *'. Below these is a table with columns: 'Sequence Number', 'Queue Type', 'Queues', 'Report Id', 'Fields', 'Actions', and 'Mapping Details'. The 'Sequence Number' column has a checkbox and a text input. The 'Queue Type' column has a dropdown menu. The 'Queues' column has a text input. The 'Report Id' column has a text input. The 'Fields' column has a text input. The 'Actions' column has a text input. The 'Mapping Details' column has a 'Mapping Details' button. At the bottom of the window, there are fields for 'Maker', 'Checker', 'Date Time', 'Mod No', 'Record Status', 'Authorization Status', and a 'Cancel' button.

Specify the following details:

Dashboard Id

Specify the dashboard id here.

Dashboard Description

The system displays the dashboard description in the task pane.

Main Menu

Specify the main menu name here,

Language Code

Specify the language code of the dashboard.

Sequence Number

Specify the sequence number for the dashboard. It is used to sequence the order in which the frames are displayed in dashboard.

Queue Type

Select the queue type from the adjoining drop-down list. This list displays the following values:

- Queue - If you select this option, then system displays all valid queue ids in the 'Queue Id' option list.
- Count - If you select this option, then system displays the title for the frame selected. This is used when you want to configure a summary dashboard having multiple queue and their corresponding count.

Queue ID

If the 'Queue Type' is 'Queue', then the adjoining option list displays all valid queue ids maintained in the system. If the 'Queue Type' is 'Count', then the adjoining option list displays the title for the view.

Report Id

Select the report id for the dashboard from the adjoining option list. This list displays all valid report ids maintained in the system.

Fields

System displays the fields of the dashboard here, based on the fields selected from the 'Mapping Details' screen.

Actions

System displays the fields of the dashboard here, based on the fields selected from the 'Mapping Details' screen.

Note

Each dashboard should have minimum one and maximum six frames. If more than six dashboards are mapped to the main menu dashboard, then system displays the error message, "Cannot map more than 6 Queues for a Dashboard."

3.1.1.1 Specifying the Mapping Details

You can select the fields and actions by clicking the 'Mapping Details' button in the 'Origination Dashboard Maintenance' screen. This screen is used to select the action and columns that you want to perform on a particular frame of the dashboard ..

The screenshot shows the 'Mapping Details' window. At the top, there are fields for 'Dashboard Id' (QUICKVIEW) and 'Sequence Number' (1). Below these are two main sections: 'Available Fields' and 'Available Actions'. The 'Available Fields' section contains a table with columns 'List' and 'Description'. It lists various task states: ACQUIRED (Acquired Tasks), ASSIGNED (Assigned Tasks), SUPERVISOR (Supervisor Task), PENDING (Tasks on Hold), COMPLETED (Completed Task), RETAILLOAN (RetailLoan Task), and CORPORATELOAN (CorporateLoan Task). The 'Available Actions' section is currently empty. To the right of these sections are two more tables: 'Selected Fields' and 'Selected Actions'. The 'Selected Fields' table contains: ESCALATED (Escalated Tasks), EXPIRED (Expired Tasks), AGING (Aging Tasks), LOW (Low Priority Tasks), and TODAY (High Priority Tasks). The 'Selected Actions' table is empty. Navigation buttons (left, right, and search) are present between the available and selected sections. At the bottom right, there are 'Ok' and 'Cancel' buttons.

In this screen, you can select the required fields and actions for the dashboard from the Available Fields and Available Actions. Available fields displays all the queues maintained from SMDQUEMT screen, if the option selected is Count in queue type. Available action displays all the actions listed in the header of the task bar. On clicking the right-arrow button, system moves the selected fields and actions to the Selected Fields and Selected Actions sections respectively. Similarly, to de-select an action or a field, click the left-arrow button. Available fields displays blank if the queue type is selected queue and if the option is selected as 'Queue'. The mapping details are not allowed if the queue type is selected as BAM. The

system displays an error message as “No field mappings available for selected queue criteria”.

3.1.2 Maintaining Origination Dashboard Role Details

You can define the role and user for each dashboard using the ‘Origination Dashboard Role Maintenance’ screen. You can invoke this screen by typing ‘ORDDSHRL’ in the field at the top-right corner of the Application tool bar and clicking the adjoining arrow button.

The screenshot shows the 'Origination Dashboard Role Maintenance' window. It features a title bar, a 'Save' button, and input fields for 'Dashboard Id' and 'Description'. Below these is a table with columns 'Map To', 'User / Role Id', and 'Default'. The 'Map To' column has a dropdown menu with 'Role' selected. The 'User / Role Id' column has an input field. The 'Default' column has a checkbox. At the bottom of the window, there are labels for 'Maker', 'Checker', 'Mod No', 'Date Time:', 'Record Status', and 'Authorization Status'. A 'Cancel' button is in the bottom right corner.

Specify the following details:

Dashboard Id

Select the dashboard id from the adjoining option list. This list displays all valid dashboard ids maintained in the system.

Description

System displays the description for the selected dashboard id.

Map To

Select the dashboard mapping from the adjoining drop-down list. This list displays the following values:

- Role - If you select this option, then you can map the dashboard user with specific roles.
- User - If you select this option, then you can map the dashboard to a user.

User/Role Id

Select the user id or role id (based on the mapping type) from the adjoining option list. This list displays all valid user ids and role ids maintained in the system. You can select the appropriate one.

Default

Check this box to indicate that the dashboard should be included in the Quick View frame for a specific user or role.

If a dashboard is mapped as default for a role or user id, then you cannot map another dashboard as default. The system displays an error as “User /Role already has default dashboard” in such case.

If there are different dashboards mapped to role and user id having the same role, then dashboard mapped to the user id will take precedence over the dashboard mapped as default for the role.

3.2 Dashboards

Oracle FLEXCUBE allows you to configure dashboards with multiple queues, count various queues and map dashboards to specific user roles or users.

The screenshot displays the Oracle FLEXCUBE dashboard interface. At the top, there's a navigation bar with tabs: Home, Interactions, Customer, Workflow, and Tasks (selected). Below this is a search bar and a 'Quick Search' section. The main area is divided into several panels:

- Assigned Tasks(75):** A table with columns: Workflow Reference, Title, Creation Date(FromTo). It lists tasks like 'RetailLending8916', 'RetailLending8913', 'RetailLending8922', 'RetailLending8923', and 'RetailLending8924'.
- Acquired Tasks(6):** A table with columns: Workflow Reference, Title, Creation Date(FromTo). It lists tasks like 'RetailLending8867', 'RetailLending8874', 'RetailLending8864', 'RetailLending8907', 'RetailLending8906', and 'RetailLending8910'.
- Tasks on Hold(5):** A table with columns: Workflow Reference, Title, Creation Date(FromTo). It lists tasks like 'RetailLending8866', 'RetailLending8868', 'RetailLending8875', 'RetailLending8872', and 'RetailLending8871'.
- Completed Tasks(0):** A table with columns: Workflow Reference, Title, Creation Date(FromTo). It lists tasks like 'RetailLending9290', 'RetailLending9298', 'RetailLending9302', 'RetailLending9304', and 'RetailLending9307'.
- HIGH PRIORITY(0):** A table with columns: Workflow Reference, Title, Creation Date(FromTo). It lists tasks like 'CorporateLending12908ApplicationVerification', 'CreditProposal12911', 'CreditProposal12912', and 'CreditProposal12913'.
- Action List:** A table with columns: Queue Name, Count. It lists queues like 'Escalated', 'Expired', 'Aging', 'High', and 'TODAY'.

Mouse over on an item on the dashboard to view the details in a pop-up window.

Following are the features of Origination Dashboards:

- **Blow Up** - On clicking the 'Blow Up' button, system gives a detailed view of the particular frame in the dashboard.
- **Refresh** - On clicking the 'Refresh' button, system refreshes the particular frame in the dashboard.
- **Filter Search** - On checking the 'Filter' box, system displays the filter criteria. Using the filter option, you can search a particular task in a particular queue dashboard as well as in all queue dashboards.
- **Actions** - You can select task-specific actions such as Acquire, Copy, Release, Status, Resume, etc, on the dashboard queues.
- **Tool Tip** - You can view the details of the task when you place the cursor on the Workflow Reference Number of a particular task in the queue frames of the dashboard.

Note

Each dashboard has minimum one to maximum six frames.

Following are the pre-configured dashboards available in the system:

- Default Dashboard - This dashboard lists the Assigned, Acquired, Pending, Completed, High Priority tasks along with the Action List which lists the Escalated, Expired, Aging, High Priority and Today queue count.
- Cancelled Applications - This dashboard lists the cancelled Applications in Retail Lending, Corporate Lending, CASA and Trade.
- High Priority - This dashboard lists the high priority Applications in Retail Lending, Corporate Lending, CASA and Trade.
- High Value - This dashboard lists the high value Applications in Retail Lending, Corporate Lending, CASA and Trade.
- Quick View - This dashboard can be mapped to the Quick View frame. It displays details such as task count in each category (Escalated, Expired, Aging, High Priority and Today queue count) and Assigned, Acquired and High Priority Queue Dashboard.

You can click on workflow reference number to launch the application. The system launches the queue on click of the queue name in the count dashboards.

In addition to the pre-configured dashboards, you can create additional dashboards using the 'Origination Dashboard Maintenance' screen.

4. Configurations

4.1 Introduction

Oracle FLEXCUBE Process Framework allows you to configure Queues, Landing and Sub-stages in the workflow layer to suit your bank's requirements. It also keeps track of duplication of transactions on the basis of the fields that you indicate.

4.2 Configuring Landing Page

The page that is displayed on invoking the application is called as the 'Landing Page'. As mentioned above, you can launch a search for a particular task on the basis of the fields displayed in the Task List pane under the 'All' sub-menu in the 'Search' main menu item. The fields under this sub-menu (All) are pre-defined in the system and represent all process flows. The search fields under the 'All' sub-menu are displayed as shown in the screen below:

Queue Name	Count
Initiated	0
Reviewed	0
Processed	0
Cancelled	0
Approved	0
Funded	0

You can also choose to maintain additional fields for specific process flows. When you maintain additional fields for search operation for a process flow, the process flow is displayed under the 'Search' main menu and all the fields (pre-defined and the additional ones maintained for the process flow) become available for you to search on.

You can define the process-flow specific additional fields in the 'Landing Page Configuration' screen, which you can invoke by typing 'SMDLNDPG' in the field at the top right corner of the Application tool bar and clicking the adjoining arrow button. The following screen is displayed:

Here, you can capture the following details:

Process Code

Specify the function ID associated with the process work flow for which you are defining additional details.

Field Name

Select the field name which should appear in the Task List pane when you carry out a search for a task under the process flow mentioned above.

Field Label

Specify the name that should be displayed in the Task List pane.

Display

Check this box if the value of the field specified should be displayed as part of task details when you click on a task. This is applicable only when the 'Process Code' field is 'specified as 'All'.

Searchable

Check this box to indicate that the field should be made available for searching tasks. This facility is available for any 'Process Code'.

Seq No

Specify the order of display for the filed.

For instance, if you have maintained the fields 'Currency' and Product ID as an additional field for the Export LC process flow, you can see these fields along with the ones available under the 'All' sub-menu, when you click the 'Export LC' queue under the 'Search' main menu item.

4.3 Configuring Queues

A queue represents a set of human tasks that are grouped on the basis of the common characteristics they share. For instance, you could have groups based on whether the tasks have been completed, deleted or the type of transaction

You can define the basis for grouping for each queue in the 'Queue Maintenance' screen. To invoke this screen, type 'SMDQUEMT' in the field at the top right corner of the Application tool bar and click the adjoining arrow button. The following screen is displayed:

In this screen, you are required to specify the following details:

Queue ID

Specify a unique identification code for the queue.

Queue Type

Indicate the type of tasks that should be displayed for the queue you are defining. Select one of the following values from the adjoining drop-down list:

- Editable tasks: Tasks where the user will be allowed to modify existing data.
- Read-only Tasks: Tasks where the user can only view existing information.
- Normal Tasks – All the tasks for which the user has rights (editable/read-only)
- Supervisor – All tasks pertaining to the all the subordinates of the user.
- Current stage – The current stage of a process instance in which the user has performed at least one task.

Queue Criteria

Specify the criteria to be used to filter all tasks. The criteria specified here and the queue type you have indicated earlier determine the tasks that are displayed under each queue.

You can also associate Function IDs to queues by specifying them here. If you do so, only those Function IDs that have been associated can be accessed by the user. If there is no such association in the criteria, all Function IDs will be made available for the queue.

Filter Column

Indicate the basis for filtering the tasks.

Operator

Indicate the operator.

Filter Value

Specify the value to be considered for filtering.

Others

If 'Filter Value' chosen is 'Others', you can specify the value here.

Language Code

Indicate the language code to be used for the queue ID.

Main Menu

Indicate the name of the group under which the queue should be placed.

Sub-Menu

Specify the name for the queue. This will appear under the Main Menu.

Description

Specify a relevant description that will be displayed when you point the mouse on the Sub-Menu.

Workflow places the tasks that meet the criteria specified for each queue.

4.4 Configuring Sub-Stages

In the BPEL workflow layer, there are several points at which human tasks are generated. These tasks can be further divided into sub-stages which have entry conditions, exit outcomes etc. You can capture these details in the 'Task Sub Stage Maintenance' screen.

You can invoke this screen by typing 'SMDSUBST' in the field at the top right corner of the Application tool bar and clicking the adjoining arrow button. The following screen is displayed:

You are required to maintain the following details in this screen:

Function ID

Specify the Function ID associated with the human task for which you are defining sub-stages. The adjoining option list displays all valid function IDs available in the system. You can select the appropriate one.

Seq No

The system displays the sequence number for the current sub-stage.

Sub Stage Function Id

Specify the Function ID for the sub-stage. The adjoining option list displays all valid function IDs available in the system. You can select the appropriate one. The roles and the screen displayed for the sub-stage are fetched accordingly. This can be the same as the main Function ID for the task.

Sub Stage Name

Specify a unique name for the sub-stage.

Outcome List

Specify the possible outcomes allowed for this sub-stage. You can have any of the following:

- **MOVENXT:** If this is chosen, the current Function ID screen will be closed and the process will move on to the next sub-stage in sequential order
- **AUTOMOVENXT:** If this option is selected, the task will go to the next stage. The next sub-stage will be acquired automatically (provided the user has the relevant rights). The Function ID of the next sub-stage will be displayed in the screen.
- **MOVEPREV:** If this is chosen, the task will be moved to the previous stage mentioned or to the sub-stage sequence number specified in the 'Reject To Stage' field.

To facilitate this configuration, you need to map the first sub-stage to the Function ID of the human task. Also, you will be allowed to select only the 'MOVEPREV' option for the last sub-stage you have defined.

Entry Rule

Specify the conditions that need to be fulfilled for this sub-stage to be initiated. The specification is done in the same syntax as that for the queue configuration. If the criteria specified are satisfied, then the transaction comes to this sub-stage. If not, it moves to the next sub-stage.

Reject To Stage

This is the sub-stage to which a task is sent to in case the task is rejected at any point in the sub-stage process. If you do not specify any value for this, a rejected task will be sent to the previous level.

4.5 Checking Duplicate Transactions

During initiation of a process flow, when you enter and save the data, the system checks for duplicate transactions among all authorized and unauthorized tasks carried out on the same day. This check is performed based on a list of fields maintained for every transaction type. If duplicate transactions exist, The system will display the overrides message with Workflow reference numbers of all the matching tasks.

You can however, override the message and continue with the current process.

You can define the fields that need to be matched for duplication in the 'Function Description Maintenance' screen. You can invoke this screen by typing 'SMDFNDS' in the field at the top right corner of the Application tool bar and clicking the adjoining arrow button.

Function Description Maintenance

New Enter Query

Function Id * Name
Module List * Type Form
User Function Id Menu Head MODULE

Type String Maintenance

☐ Tanking Required
☐ Dual Authorization
☐ Remarks Required
☐ Excel Export Required
☐ Multi Branch Access
☐ Field Log Required

☐ Available
☐ Automatic End of Day aware
☐ Log Event
☐ Customer Access
☐ Auto Authorization
☐ Head Office Function
☐ Duplicate task check

Main Control String for functions and reports Duplicate Check Fields

Function Description

1 Of 1

Language Code *	Main Menu	Sub Menu 1	Sub Menu 2	Balloon Help	Description
-----------------	-----------	------------	------------	--------------	-------------

Field Properties

Maker Date Time: Mod No
Checker Date Time: Record Status
Authorization Status

Exit

In this screen, you are required to indicate the following details to facilitate checking for duplicate transactions:

Duplicate Check

Check this box to ensure that a validation is carried out to track duplication of transactions.

Field Name

Specify the field that should be the basis on which transaction duplication is checked.

Enabled

Check the box against each field whose values you want the system to compare across transactions.

4.6 Enabling User Rights

As mentioned earlier, each human task has a Function ID and the roles assigned to the Function ID are inherited by the task when it is initiated. A user, with access rights to the Function ID for the task, can either view the details of the task or perform edit operations on it.

You can define these rights in the 'Process Stage Rights' screen. To invoke this screen, type 'SMDROLDF' in the field at the top right corner of the Application tool bar and click the adjoining arrow button. In the 'Role Maintenance' screen that is displayed, click 'Process Rights' button. The following screen is displayed:

The screenshot shows a software window titled "Process Stage Rights". Inside, there's a "Process" section with a search bar containing "10f1". Below this is a table with two columns: "Role Function" and "Editable". The first row has a checkbox, a text field, and a checkbox. The second row has a checkbox, a text field, and a checkbox. At the bottom right are "Ok" and "Exit" buttons.

Specify the following details in the screen:

Role Function

Specify the Function ID for which you wish to define rights. The adjoining option list displays all valid function IDs available in the system. You can select the appropriate one.

Editable

Check this box if you wish to allow editing of data for this task/Function ID. If you do not check this box, the user can only view details for the role function specified earlier.

You can, therefore, use this screen to allow only editing or only modifying rights for a user for different role functions.

5. Function ID Glossary

O		SMDLNDPG	4-1
ORDDSHMT	1	SMDQUEMT	4-3
ORDDSHRL	3	SMDROLDf	4-7
S		SMDSUBST	4-5
SMDFNDSC	4-6		