

**Tasks User Guide**

# **Oracle Banking Microservices Architecture**

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## Tasks User Guide

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## Preface

### Purpose

This guide enables the user to integrate Oracle Products with External Product Processor through Oracle Banking Routing Hub Platform.

### Audience

This guide is intended for the customers and partners.

### 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>.

### Access to Oracle Support

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### Critical Patches

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### Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

### Related Resources

For more information on any related features, refer to the following documents.

- *Oracle Banking Common Core User Guide*
- *Oracle Banking Getting Started User Guide*

### Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

<i>Italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

## Acronyms and Abbreviations

The list of the acronyms and abbreviations used in this guide are as follows:

**Table -1 Acronyms and Abbreviations**

Abbreviation	Description
API	Application Programming Interface
JSON	Java Script Object Notation
XML	Extensible Markup Language
WSDL	Web Services Description Language

## Basic Actions














**Table -2 Basic Actions**

Action	Description
<b>Submit</b>	Click to complete the transaction after you specify all the input parameters for a particular transaction.
<b>Cancel</b>	Click to cancel the transaction input midway without saving any data.
<b>Clear</b>	Click to clear the transaction input data. The system displays a pop-up screen with confirmation to clear data. You can click <b>OK</b> to confirm or click <b>x</b> icon to retain the data.
<b>Query</b>	On completion of input of necessary parameters, click this button to fetch and display the details.
<b>OK</b>	Click to confirm the details in the pop-up screen.
<b>Save</b>	Click to save the details specified in the screen.
<b>Exit</b>	Click to close the screen and go to Home screen.

## Symbols and Icons

This guide has the following list of symbols and icons.

**Table -3 Symbols and Icons – Common**

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform search
	Add a file
	Edit a file
	Delete a row
	Import a file
	To perform the actions
	Navigate to the first page
	Navigate to the last page
	Navigate to the previous page
	Navigate to the next page

# 1 Tasks

Task menu has multiple sub menus. Based on the user role, the sub menus can be accessed by the user.

Task Menu has the following sections:

- [1.1 Awaiting Customer Clarification](#)
- [1.2 Completed Tasks](#)
- [1.3 Free Tasks](#)
- [1.4 Hold Tasks](#)
- [1.5 My Tasks](#)
- [1.6 Search](#)
- [1.7 Supervisor Tasks](#)
- [1.8 Business Process Maintenance](#)

## 1.1 Awaiting Customer Clarification

Awaiting Customer Clarification menu displays the tasks which are in awaiting customer clarification state. The task list will display the following details of the task:

- Action
- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

**Figure 1: Awaiting Customer Clarification**

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
<input type="checkbox"/> Edit	high	Savings Account Origin...	000SAVNEW0006137	000APP000014292	Application Enrichment	20-03-26	000	006096	

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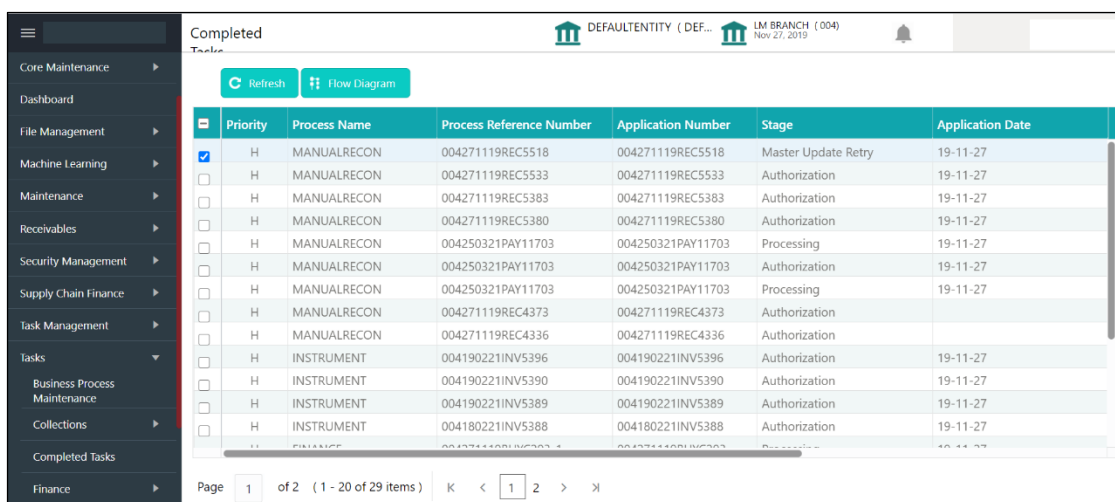


## 1.2 Completed Tasks

Completed Tasks menu displays the tasks which has recently completed a stage in a process by the current user. This menu does not display completed tasks of all the stages but displays only the latest stage. The task list will display the following details of the task:

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

**Figure 2: Completed Tasks**



	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/>	H	MANUALRECON	004271119REC5518	004271119REC5518	Master Update Retry	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5533	004271119REC5533	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5383	004271119REC5383	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5380	004271119REC5380	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC4373	004271119REC4373	Authorization	
<input type="checkbox"/>	H	MANUALRECON	004271119REC4336	004271119REC4336	Authorization	
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5396	004190221INV5396	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5390	004190221INV5390	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5389	004190221INV5389	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004180221INV5388	004180221INV5388	Authorization	19-11-27

Following actions can be performed on the Completed Tasks menu:

- Flow Diagram - Completed Tasks menu enables user to view the process flow of the selected task and user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

## 1.3 Free Tasks

Free Tasks menu will display the tasks which were not acquired by any user and for which the current user is entitled to access. The task list will display the following details of the task:

- Action
- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

**Figure 3: Free Tasks**

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20220	004240421INV20220	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20218	004240421INV20218	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20216	004240421INV20216	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20214	004240421INV20214	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20212	004240421INV20212	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20210	004240421INV20210	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20208	004240421INV20208	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20206	004240421INV20206	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20204	004240421INV20204	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20202	004240421INV20202	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20200	004240421INV20200	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20198	004240421INV20198	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20196	004240421INV20196	Authorization	19-11-27

Following action can be performed on the Free Tasks menu:

- Acquire & Edit - Click **Acquire & Edit** to acquire the task and edit directly from free tasks menu.
- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.
- Flow Diagram - Free Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

## 1.4 Hold Tasks

Hold Tasks menu displays the tasks which were moved on hold by the current user. The task list will display the following details of the task:

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

**Figure 4: Hold Tasks**

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
H	INSTRUMENT	004211220PAY3683	004211220PAY3683	Authorization	19-11-27

Following action can be performed on the Hold Tasks menu:

- Resume - Select the task and click **Resume** to move the task to **My Tasks** menu and edit.
- Flow Diagram - Hold Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

## 1.5 My Tasks

My Tasks menu displays the tasks acquired from the free tasks menu by the current user. The task list will display the following details of the task:

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

**Figure 5: My Tasks**

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20030	004230421INV20030	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20029	004230421INV20029	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN185	004220421CN185	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN184	004220421CN184	Authorization	19-11-27
<input type="checkbox"/> Edit	H	CMS	004140421CW287	004140421CW287	Authorization	
<input type="checkbox"/> Edit	H	INSTRUMENT	004090421INV11977	004090421INV11977	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004080421INV11968	004080421INV11968	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11956	004070421INV11956	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11953	004070421INV11953	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11949	004070421INV11949	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11946	004070421INV11946	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11945	004070421INV11945	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004060421INV11913	004060421INV11913	Authorization	19-11-27

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Following action can be performed on the My Tasks menu:

- Edit - Click **Edit** to edit the selected task.
- Release - Click **Release** to release the selected task from My Tasks to Free Tasks menu.
- Refresh - Click **Refresh** to refresh the task list.
- Flow Diagram - My Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Delegate - Click **Delegate** to assign the acquired task to any valid user for processing within the group.
- Escalate - Task will be assigned to Supervisor

## 1.6 Search

Search menu enables the user to search for the task(s) with the following filters. Search will fetch the results either will one filter criteria or with multiple filter criteria.

- Application Number
- Customer Name
- Branch Name
- Tasks
- Priority
- Process and Stage
- Entity Type
- Amount

**Figure 6: Search**

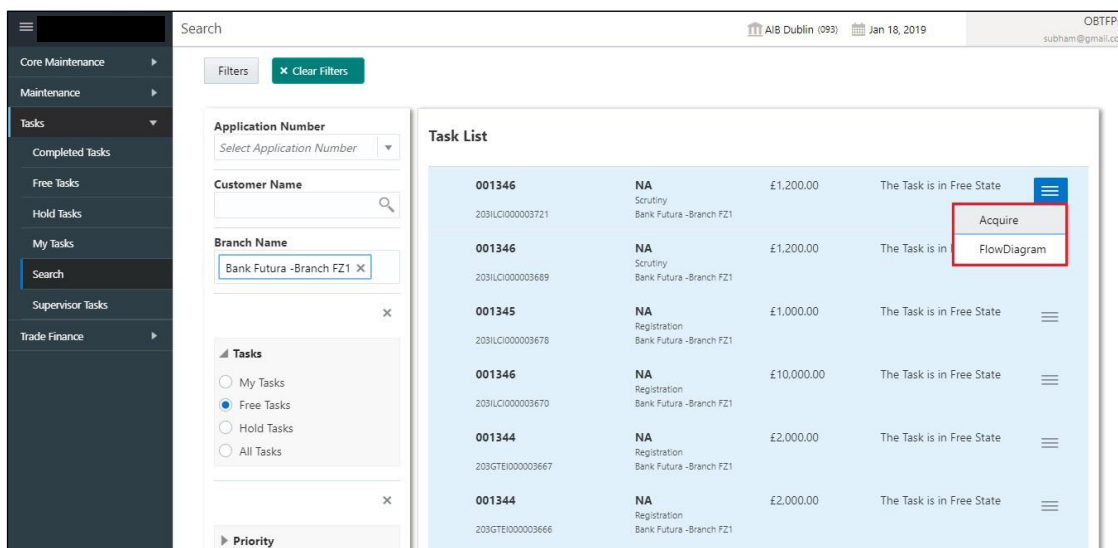
The screenshot displays the 'Search' interface. On the left, a sidebar lists navigation options: Core Maintenance, Maintenance, Tasks, Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search (highlighted), Supervisor Tasks, and Trade Finance. The main area is titled 'Search' and includes a 'Filters' section with a 'Clear Filters' button. The filters are organized into sections: Application Number (with a dropdown), Customer Name (with a search icon), Branch Name (with a dropdown), Tasks (with a dropdown), Priority (with a dropdown), Process (with a dropdown), Entity Type (with a dropdown), and Amount (with a dropdown). The 'Task List' section on the right displays a table of tasks.

Application Number	Customer Name	Branch Name	Amount	Status
001346 203ILC000003721	NA Scrutiny Bank Futura -Branch FZ1		£1,200.00	The Task is in Free State
093001401 093ILCA000003720	NA Approval2 AIB Dublin		\$150,000.00	The Task is in Free State
001346 203ILC000003689	NA Scrutiny Bank Futura -Branch FZ1		£1,200.00	The Task is in Free State
093001401 093ILCA000003688	NA Retry HandOff AIB Dublin		\$100,000.00	The Task is in Free State
093001401 093ILCA000003687	NA Retry HandOff AIB Dublin		\$100,000.00	The Task is in Free State
093001401 093ILCA000003686	NA Retry HandOff AIB Dublin		\$150,000.00	The Task is in Free State
093001401 093ILCA000003684	NA Retry HandOff AIB Dublin		\$150,000.00	The Task is in Free State
093001401 093ILCA000003683	NA Retry HandOff AIB Dublin		\$150,000.00	The Task is in Free State

Following actions can be performed on the tasks listed in the task list:

- Acquire - Click **Acquire** to acquire the task.
- Flow Diagram - enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.

**Figure 7: Search – Task List**



## 1.7 Branch Servicing Pending Transactions View

This screen provides details of pending branch servicing transactions that need to be completed before the end-of-day process begins. By default, the details are displayed for the logged-in branch and all users. Users can filter the pending transactions for specific users if needed.

When the screen is launched, pending service transactions for the logged-in branch are displayed with the following details:

- Number of pending transactions
- Process Name
- Reference Number
- Stage
- Status
- User ID



Figure 7: Branch Servicing Pending Transactions

Dashboard

(DEFAULTENTITY )

BRANCH CS7 (CS7 )

Mar 30, 2018

CASAAUTO2

Branch Servicing Pending Transactions

Branch  
CS7

Branch Name  
BRANCH CS7

Search User

2234 Transactions

Refresh

Process Name	Reference Number	Stage	Status	User
Deposit Redemption	DSRAPP2303200092987	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092983	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092981	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092980	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092979	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092978	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092977	Initiation	Inprogress	MITESH03
Deposit Redemption	DSRAPP2303200092976	Initiation	Inprogress	MITESH03

**NOTE:** This screen displays the pending branch servicing transactions that are configured for pending transaction checks. By default, all branch servicing screens are configured for pending transaction checks, and it is allowed to modify them in the CMN\_TM\_TRAN\_CONFIG table.

Field	Description
<b>Branch</b>	Display the user logged in branch and the pending transactions displayed for this branch.
<b>Branch Name</b>	Display the branch name.
<b>Search User</b>	Select the user id to filter the pending branch servicing transactions for a specific user. The LOV fetch all open and authorized user. The LOV screen, user can search the user by username and <b>User ID</b> .
<b>Refresh</b>	Click on this button to refresh the details.
<b>Process Name</b>	Display the process name for the pending transactions.
<b>Reference Number</b>	Display the related Reference Number for the pending transactions.
<b>Stage</b>	Display the current stage of pending transaction.
<b>Status</b>	Display the current status of pending transaction.
<b>User</b>	Display the user ID with whom the transaction is pending.  <b>Note:</b> If the transaction is not assigned to any user, the last actioned user ID should be displayed for the pending transactions

## 1.8 Validate Pending Branch Servicing Transactions as Part of the EOD Process

During the end-of-day (EOD) process, the system verifies if any system about the end of day if any pending branch servicing transactions are still incomplete. The bank can configure which branch servicing transactions need to be completed on the same day. Transactions do not configure for end-of-day validation can continue the next day, while processing the transactions in the next day system gives an information message to the user that the transaction was initiated on the previous day.

## 1.9 Supervisor Tasks

Supervisor Tasks menu will display 'User Tasks' or 'Free Tasks' based upon the option which is selected. The task list will display the following details of the task:

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 8: Supervisor Task

<div> <div></div> <div>Menu Item Search...</div> </div> <div> <div>Core Maintenance</div> <div>Dashboard</div> <div>Maintenance</div> <div>Security Management</div> <div>Tasks</div> <div>Awaiting Customer Clarification</div> <div>Business Process Maintenance</div> <div>Completed Tasks</div> <div>Free Tasks</div> <div>Hold Tasks</div> <div>My Tasks</div> <div>Search</div> <div>Supervisor Tasks</div> <div>Trade Finance</div> </div>		<div> <div>Supervisor</div> <div>Tasks</div> <div> <div>User Tasks</div> <div>Free Tasks</div> </div> <div> <div>Refresh</div> <div>Release</div> <div>Reassign</div> <div>Flow Diagram</div> </div> </div> <table> <tr> <th></th><th>Priority</th><th>Process Name</th><th>Process Reference Number</th><th>Application Number</th><th>Stage</th><th>Application Date</th></tr> <tr> <td><input checked="" type="checkbox"/></td><td>M</td><td>Import Documentary C...</td><td>PK2IDCB000004721</td><td>PK2IDCB000004721</td><td>DataEnrichment</td><td>21-04-23</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Export Documentary Co...</td><td>PK2EDCU000004543</td><td>PK2EDCU000004543</td><td>DataEnrichment</td><td>21-04-12</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import Documentary C...</td><td>PK2IDCB000004704</td><td>PK2IDCB000004704</td><td>Registration</td><td>21-04-20</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import Documentary C...</td><td>PK2IDCB000004703</td><td>PK2IDCB000004703</td><td>Registration</td><td>21-04-20</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Guarantee Claim Lodging</td><td>PK2GTEC000004683</td><td>PK2GTEC000004683</td><td>Scrutiny</td><td>21-04-19</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004642</td><td>PK2ILCU000004642</td><td>Scrutiny</td><td>21-04-16</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004604</td><td>PK2ILCU000004604</td><td>Scrutiny</td><td>21-04-15</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004603</td><td>PK2ILCU000004603</td><td>Scrutiny</td><td>21-04-15</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004601</td><td>PK2ILCU000004601</td><td>Scrutiny</td><td>21-04-15</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing</td><td>PK2ILCD000004561</td><td>PK2ILCD000004561</td><td>Scrutiny</td><td>21-04-13</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004483</td><td>PK2ILCU000004483</td><td>Scrutiny</td><td>21-04-08</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import LC Drawing Upd...</td><td>PK2ILCU000004439</td><td>PK2ILCU000004439</td><td>Scrutiny</td><td>21-04-07</td></tr> <tr> <td><input type="checkbox"/></td><td>M</td><td>Import Documentary C...</td><td>PK2IDCU000004310</td><td>PK2IDCU000004310</td><td>DataEnrichment</td><td>21-04-05</td></tr> </table> <div> <div>Page</div> <div>1</div> <div>of 22 (1 - 20 of 429 items)</div> <div>K</div> <div>&lt;</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>...</div> <div>22</div> <div>&gt;</div> <div>X</div> </div>						Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	<input checked="" type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004721	PK2IDCB000004721	DataEnrichment	21-04-23	<input type="checkbox"/>	M	Export Documentary Co...	PK2EDCU000004543	PK2EDCU000004543	DataEnrichment	21-04-12	<input type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004704	PK2IDCB000004704	Registration	21-04-20	<input type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004703	PK2IDCB000004703	Registration	21-04-20	<input type="checkbox"/>	M	Guarantee Claim Lodging	PK2GTEC000004683	PK2GTEC000004683	Scrutiny	21-04-19	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004642	PK2ILCU000004642	Scrutiny	21-04-16	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004604	PK2ILCU000004604	Scrutiny	21-04-15	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004603	PK2ILCU000004603	Scrutiny	21-04-15	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004601	PK2ILCU000004601	Scrutiny	21-04-15	<input type="checkbox"/>	M	Import LC Drawing	PK2ILCD000004561	PK2ILCD000004561	Scrutiny	21-04-13	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004483	PK2ILCU000004483	Scrutiny	21-04-08	<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004439	PK2ILCU000004439	Scrutiny	21-04-07	<input type="checkbox"/>	M	Import Documentary C...	PK2IDCU000004310	PK2IDCU000004310	DataEnrichment	21-04-05
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Following actions can be performed on the Supervisor Tasks menu:

- Refresh – It will refresh the data on the grid.
- Release – Supervisor can release the task of his/her repartee and the task will be available in free task.
- Reassign - After selecting tasks from the task list, click **Reassign** button to reassign the selected tasks to any of the subordinates.
- Flow Diagram - Click **Flow Diagram** button to preview the flow diagram of the selected task.

## 1.10 Business Process Maintenance

Business Process Maintenance menu allows the user to create Workflows. Basically, it comprises of three screens-

- [1.10.1 Process List Screen](#)
- [1.10.2 Process Management Screen](#)
- [1.10.3 Verify & Submit Screen](#)

### 1.10.1 Process List Screen

It shows the list of processes. User can select any one of the existing processes or a blank process can be selected in case the user wants to create a new workflow from scratch.

**Figure 9: Process List**

The screenshot shows the 'Process List' screen within the 'Workflow Maintenance' application. The interface includes a sidebar with navigation options: 'Process List' (selected), 'Process Management', and 'Verify & Submit'. The main area displays a table of existing processes. At the top, there is a search bar labeled 'Search Workflow' and an 'Upload DSL' button. The table lists processes with their names, versions, and descriptions. At the bottom right, there are 'Back', 'Next', and 'Cancel' buttons.

Process Name	Version	Process Description
blank	blank	
CMS	1	N/A
FINANCE	1	Completes the Finance flow from Processing to Alerts
INSTRUMENT	1	N/A
MANUALRECON	1	MANUALRECON
CMSGENERIC	1	N/A

Following actions can be performed on the Process List screen:

**Search** – For searching any of the existing workflows/Process.

**Upload DSL** – Can be used to upload workflow in JSON format.

**Next** – After selecting one process, click **Next** button to navigate to the next screen “**Process Management**”.

**Cancel** – To exit from the Business Process Maintenance Menu.

## 1.10.2 Process Management Screen

It shows the list of the stages under the process, which was selected from the Process List screen, on the right under the heading **Process Stage List**. Also, all stages are listed in table on the left under the heading **All Stage List**.

**Figure 10: Process Management**

Workflow Maintenance

Process Management

Process Name \* CMS Version 1 Process Description \*

All Stage List

Filter: http

Name	Type
master_update_task	HTTP
MasterDataUpdate	HTTP

Process Stage List

master\_update\_task

- Is Manual Enrichment Required
- Auto purge decision
- Is Auto Authorised
- Is Accounting Generation Required
- Is Clearing Required

Back Next Cancel

### Drag and Drop Functionality:

To add new stages in the process, Drag and drop any stage from All Stage List to Process Stage List.

### Creating a New Stage:

Click **Create Stage** button on the Process Management Screen to create new stage.

→ The **Create Task** screen is displayed.

The type of the stage can be changed in the core properties.

**Figure 11: Create Task**

The 'Create Task' dialog box is divided into two main sections: 'Input Parameters' and 'Stage Properties'.

**Input Parameters:**

Input Param	Values
FUNCTIONAL_CODE	
TASK_OUTCOMES	
APPLICATION_NO	\${workflow.input.applicationN...
processRefNo	\${workflow.input.processRefN...
lifecycleCode	

Below the table are '+' and '-' buttons.

**Stage Properties:**

Core Properties	Core Values
name	
taskReferenceName	
type	WAIT
startDelay	0
optional	false
asyncComplete	false

At the bottom right are 'Done' and 'Cancel' buttons.

**Edit/Delete Functionality**

Click **Edit** to Edit the stage in Process Stage List.

→ The **Modify Task** screen is displayed.

Click **Delete** to delete the stage from Process Stage List.

**Figure 12: Process Management – Edit/Delete Functionality**

The 'Process Management' screen displays details for a process named 'GTAAMDZ' (Version 1). The process description is 'Guarantee Advise Amendment Workflo'.

**All Stage List:**

Name	Type
SubmissionCheck	DECISION
ProcessingData	LAMBDA
DataEnrichment	WAIT
EnrichmentDecision	DECISION
SubmissionCheck	DECISION

**Process Stage List:**

- SubmissionCheck
- ProcessingData (highlighted with a blue bar and a context menu showing 'Edit' and 'Delete' options)
- DataEnrichment
- EnrichmentDecision

At the bottom are 'Back', 'Next', and 'Cancel' buttons.

**Figure 13: Modify Task**

**Modify Task**

**Input Parameters**

Input Param	Values
DataIn	\$(AutoRegistrationViaOnlineTr...
RegistrationIn	\$(Registration.output)
workflowIn	\$(workflow.input)
DataEnrichmentIn	\$(DataEnrichment.output)
scriptExpression	if (\$DataEnrichmentIn != null)...

**Stage Properties**

Core Properties	Core Values
name	ProcessingData
taskReferenceName	ProcessingData
type	LAMBDA
startDelay	0
optional	false
asyncComplete	false

Modify Task

Done Cancel

Following actions can be performed on the Process Management screen:

**Back** – Click **Back** button to navigate to the previous screen.

**Next** – After Modifying the stages, click **Next** button to navigate to the next screen “**Verify & Submit**”.

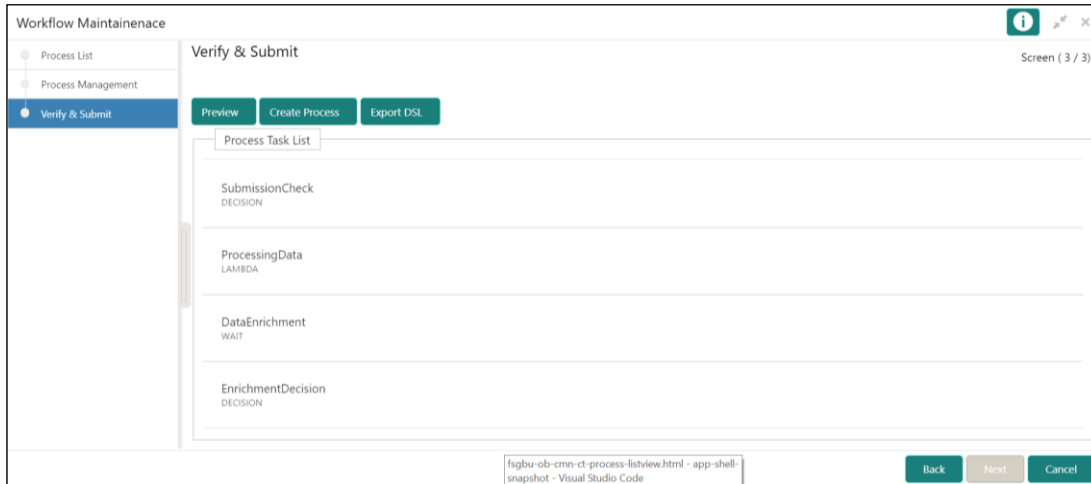
**Cancel** – To exit from the Business Process Maintenance Menu.



### 1.10.3 Verify & Submit Screen

Verify & Submit screen displays the process task list with all the new/modified tasks.

**Figure 14: Verify & Submit**



Following actions can be performed on the Process Management screen:

**Preview button-** Click **Preview** to view the flow diagram of the selected process.

**Create Process button -** Used to create new process. If an existing process is modified, a new process with updated version would appear on the process list screen or else a new process would appear.

**Export DSL button -** To Export DSL into a file in JSON format.

**Back –** Click **Back** button to navigate to the previous screen.

**Cancel –** To exit from the Business Process Maintenance Menu.

## 2 Reference and Feedback

### 2.1 References

For more information on any related features, you can refer to the following documents:

- Process Code Maintenance User Guide
- Queue Maintenance User Guide.

### 2.2 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>.

### 2.3 Feedback and Support

Oracle welcomes customers' comments and suggestions on the quality and usefulness of the document. Your feedback is important to us. If you have a query that is not covered in this user guide or if you still need assistance, please contact documentation team.

### 3 Error Codes and Messages

This topic contains the error codes and messages.

**Table 1: Error Codes and Messages**

Error Code	Messages
GCS-SAV-001	Record already exists
ORCH-0001	The system is unable to complete the task. Contact your supervisor.
ORCH-0002	Error in retrieving subordinates list.
ORCH-1001	Invalid operator is used in query criteria.
ORCH-1002	Found invalid field/s in query criteria. It allows only following fields (case sensitive):
ORCH-1003	Header or both headers are missing the request.
ORCH-1004	Invalid User/ branch in request.
ORCH-1005	Invalid query task type. Please use one of the given types:
ORCH-1006	Invalid task Id, please pass a valid task ID
ORCH-1007	Task Id should not be null, please pass a task Id in the body
ORCH-1008	In the body transaction model should not be empty
ORCH-1009	Current User cannot update the given task
ORCH-1010	Task which is completed cannot be updated.
ORCH-1011	Task must be in ACQUIRED state for update.
ORCH-1012	Invalid Supervisor/ branch in request.
file_error	Please upload json file only
select_error	Please select once process

## 4 Functional Activity Codes

This topic contains the functional activity codes.

Screen Name	Functional Activity Code	Action	Functional Activity Description
Tasks	CMC_FA_SUBMENU_1 _Awaiting	Awaiting	Awaiting Confirmation Menu
Tasks	CMC_FA_MENU_Tasks	Menu	Task Menu
Tasks	CMC_FA_SUBMENU_1 _Completed	Completed	Completed Task Menu
Tasks	CMC_FA_SUBMENU_1 _FreeTasks	FreeTasks	Free Task Menu
Tasks	CMC_FA_SUBMENU_1 _HoldTasks	HoldTasks	Hold Task Menu
Tasks	CMC_FA_SUBMENU_1 _MyTasks	MyTasks	My Task Menu
Tasks	REMO_FA_SUBMENU_1_MY_PENDING_TASKS	My Pending Tasks	FA code to access the My Pending Tasks on the Tasks page
Tasks	CMC_FA_SUBMENU_1 _SEARCH	Search	Task Search
Tasks	CMC_FA_SUBMENU_1 _Supervisor	Supervisor	Supervisor Task Menu
Tasks	CMC_FA_SUBMENU_1 _WORKFLOW_MAINT	Workflow Maintenance	Workflow Maintenance
Tasks	CMC_FA_CONFIGPROP	Configprop	Configprop Task
Tasks	CMC_FA_SUBMENU_1 _Subprocess	Subprocess	Subprocess Task Menu
Branch Servicing Pending Transactions View	FA_TDPYIN_READ FA_RDACOP_READ FA_TDREDM_READ FA_RDAMBK_READ FA_TDROLV_READ FA_RDPAYT_READ	Query	Get the details of pending account servicing transaction which needs to be completed on the same day.

	FA_TDAMBK_READ FA_TDPOMN_READ FA_RDPOMN_READ FA_RDREDM_READ FA_TDACMN_READ FA_RDACMN_READ FA_OBBRPC_READ FA_CcuSav_READ FA_TCPURC_READ FA_TCSALE_READ FA_CauSav_READ FA_MMACCL_READ FA_AauSav_READ		
Branch Servicing Pending Transactions View	FA_CASAPC_READ	Query	Get the details of pending account servicing transaction which needs to be completed on the same day.

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