

**Task Menu User Guide**

# **Oracle Flexcube Universal Banking**

Release 14.4.0.0.0

**Part No. F20443-01**

May 2020



## Task Menu User Guide

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## 1 Task Menu

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 sub menus:

- Completed Tasks
- Free Tasks
- Hold Tasks
- My Tasks
- Search

In the following sections, let's look at the details of each sub menus. This section contains the following topics:

- Completed Tasks
- Free Tasks
- Hold Tasks
- My Tasks
- Search

### 1.1 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 displays completed tasks of all the stages but displays only the latest stage. The task list will display the following details of the task:

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

The screenshot displays the 'Completed Tasks' menu in the Futura Bank system. The interface includes a sidebar with navigation options, a main content area with a table of tasks, and a footer with pagination controls.

**Completed Tasks**

Refresh | Flow Diagram

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	GS1ELCU0024250	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCU0024250	GS1	000262	£18,000.00	Export LC Liquidation	Registration
M	GS1ELCU0024233	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCU0024233	GS1	000262	£15,000.00	Export LC Liquidation	Registration
M	GS1ELCDR0024204	GS1	000262	£15,000.00	Export LC Drawing	Data Enrichment
M	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

Page 1 of 1 (1-10 of 10 items) | < 1 >

Previous | 1 - 10 of 68 records | Next

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 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.

Completed Tasks

Refresh Flow Diagram

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	GS1ELCLI0024250	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCLI0024250	GS1	000262	£18,000.00	Export LC Liquidation	Registration
M	GS1ELCLI0024233	GS1	000262	£0.00	Export LC Liquidation	Liquidation
	GS1ELCLI0024233	GS1	000262	£15,000.00	Export LC Liquidation	Registration
M	GS1ELCDR0024204	GS1	000262	£15,000.00	Export LC Drawing	Data Enrichment
M	GS1ELCDR0024225	GS1	000262	£14,000.00	Export LC Drawing	Scrutiny

Page 1 of 1 (1-10 of 10 items) 1

Previous 1 - 10 of 68 records Next

## 1.2 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
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

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.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
Acquire & Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
Acquire & Edit	M	GS1ELCLJ0024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval

- 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.

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCLJ0024400	GS1	000262	£29,000.00	Export LC Liquidation	Liquidation
Acquire & Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval
Acquire & Edit		GS1ILCDR0024318	GS1	000262	£11,000.00	Import LC Drawing	Approval1

- Reassign- Click **Reassign** to the task to sub-ordinates. This action can be performed only if user is provided with the assignment rights.

**Futura Bank** Free Tasks FBN UK (GS1) Feb 1, 2019 SRIDHAR01  
subham@gmail.com

[Refresh](#) [Acquire](#) [Delegate](#) [Reassign](#) [Flow Diagram](#)

<input type="checkbox"/>	Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/>	Acquire & Edit	M	GS1ELCDR0024410	GS1	000262	£2,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/>	Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
<input type="checkbox"/>	Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
<input type="checkbox"/>	Acquire & Edit	M	GS1ELCL00024400	GS1	000262	£29,000.00	Export LC Liquidation	Retry HandOff
<input type="checkbox"/>	Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/>	Acquire & Edit	M	GS11DCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval

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- Core Maintenance
- Corporate Lending
- Dashboard
- Maintenance
- Security Management
- Tasks
  - Completed Tasks
  - Free Tasks**
  - Hold Tasks
  - My Tasks
  - Search
  - Supervisor Tasks
- Trade Finance
- Virtual Account Manage...



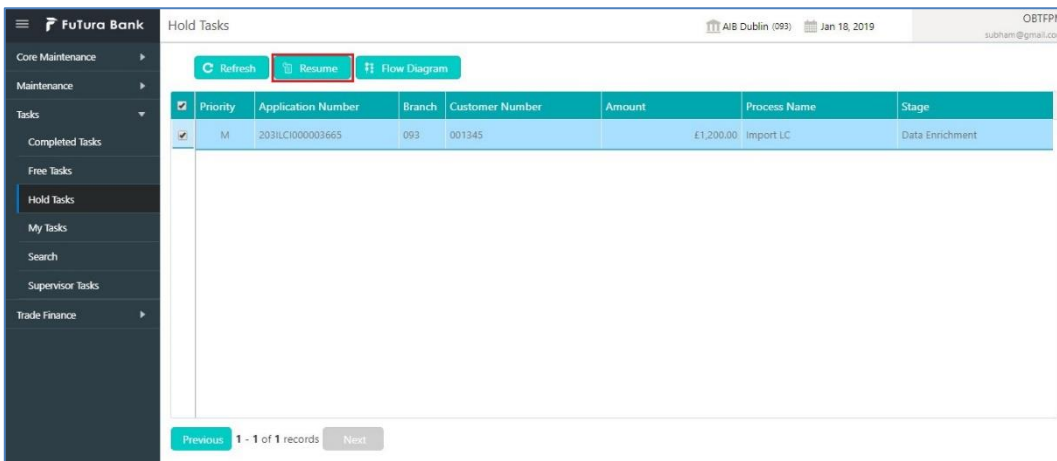
### 1.3 Hold Tasks

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:

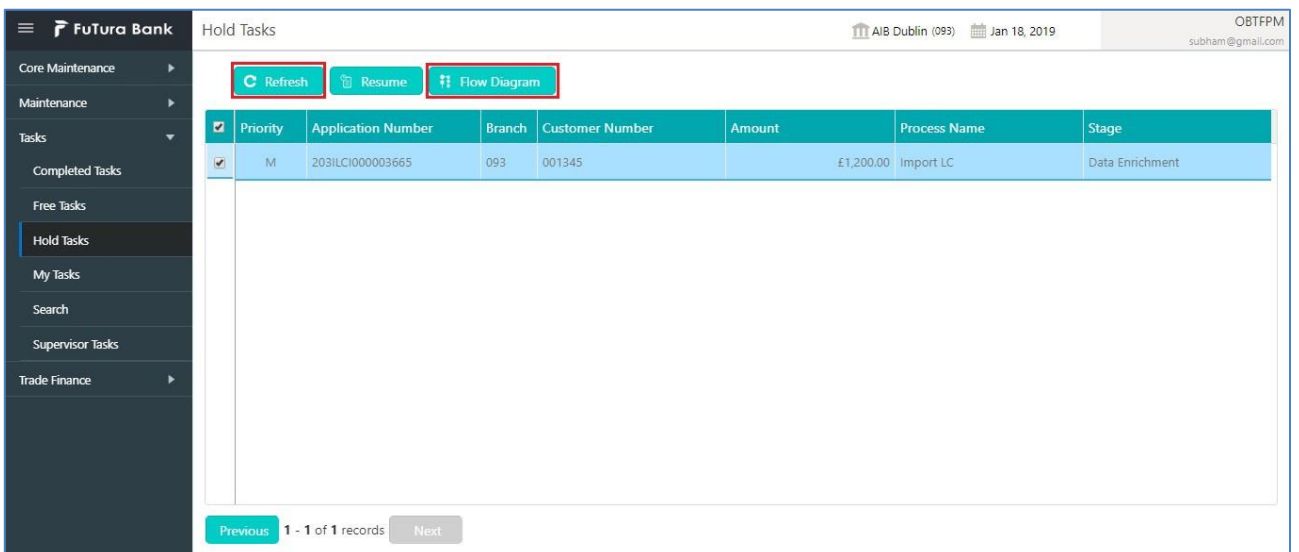
- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

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.

## 1.4 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
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Following action can be performed on the My Tasks menu:

- Edit - Click **Edit** to edit the selected task.

The screenshot shows the 'My Tasks' interface in the FuTura Bank system. The top navigation bar includes 'FuTura Bank', 'My Tasks', 'FBN UK (GS1)', 'Feb 1, 2019', and the user 'SRIDHAR01'. Below the navigation are buttons for 'Refresh', 'Release', and 'Flow Diagram'. The main area contains a table with the following data:

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
<input checked="" type="checkbox"/> Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Edit	M	GS1ELCDR0024391	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny

At the bottom, there is a pagination control showing 'Page 1 of 1 (1-2 of 2 items)' and '1 - 2 of 2 records'.

Release - Click **Release** to release the selected task from **My Tasks** to **Free Tasks** menu.

- Refresh - Click Refresh to refresh the task list.

This screenshot is identical to the previous one, but the 'Refresh' button is highlighted with a red box. The table and pagination controls remain the same.

- 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.

## 1.5 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

The screenshot displays the FuTura Bank search interface. On the left is a dark sidebar menu with categories like Core Maintenance, Maintenance, Tasks, My Tasks, Supervisor Tasks, and Trade Finance. The 'Search' option is highlighted. The main content area is titled 'Search' and includes a 'Filters' section with a 'Clear Filters' button. Below this are several filter 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). To the right of the filters is a 'Task List' table with columns for Application Number, Status, Amount, and Description. The table contains 10 rows of task data.

Application Number	Status	Amount	Description
001346	NA	£1,200.00	Scrutiny Bank Futura - Branch FZ1
203ILCI000003721			
093001401	NA	\$150,000.00	Approval2 AIB Dublin
093ILCA000003720			
001346	NA	£1,200.00	Scrutiny Bank Futura - Branch FZ1
203ILCI000003689			
093001401	NA	\$100,000.00	Retry HandOff AIB Dublin
093ILCA000003688			
093001401	NA	\$100,000.00	Retry HandOff AIB Dublin
093ILCA000003687			
093001401	NA	\$150,000.00	Retry HandOff AIB Dublin
093ILCA000003686			
093001401	NA	\$150,000.00	Retry HandOff AIB Dublin
093ILCA000003684			
093001401	NA	\$150,000.00	Retry HandOff AIB Dublin
093ILCA000003683			

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.

The screenshot displays the FuTura Bank Search interface. On the left is a dark sidebar with navigation options: Core Maintenance, Maintenance, Tasks (expanded), Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search (highlighted), Supervisor Tasks, and Trade Finance. The main content area is titled 'Search' and includes a search bar, a 'Filters' button, and a 'Clear Filters' button. Below these are filter sections for 'Application Number' (a dropdown menu), 'Customer Name' (a search input), and 'Branch Name' (a dropdown menu with 'Bank Futura -Branch FZ1' selected). A 'Tasks' section contains radio buttons for 'My Tasks', 'Free Tasks' (selected), 'Hold Tasks', and 'All Tasks'. A 'Priority' section is partially visible at the bottom.

The 'Task List' table on the right contains the following data:

Application Number	Customer Name	Amount	Status	Actions
001346 203ILCI000003721	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	Acquire, FlowDiagram
001346 203ILCI000003689	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	
001345 203ILCI000003678	NA Registration Bank Futura -Branch FZ1	£1,000.00	The Task is in Free State	
001346 203ILCI000003670	NA Registration Bank Futura -Branch FZ1	£10,000.00	The Task is in Free State	
001344 203GTEI000003667	NA Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	
001344 203GTEI000003666	NA Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	

## 2 Reference and Feedback

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

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

### 2.1 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>.

### 2.2 Feedback and Support

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