Task Menu
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Contents

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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	

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

Following actions can be performed on the Completed Tasks menu:

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- 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.

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.

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- 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.

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

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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:
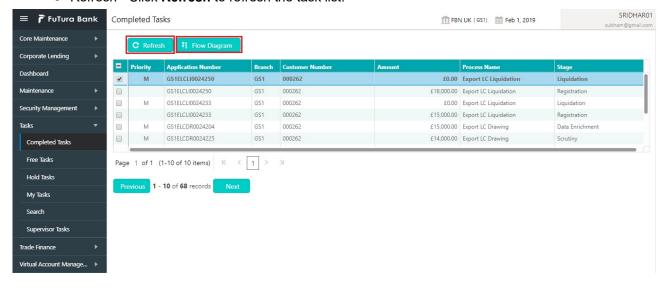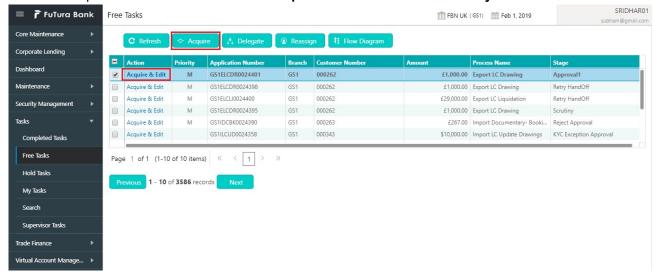
- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage
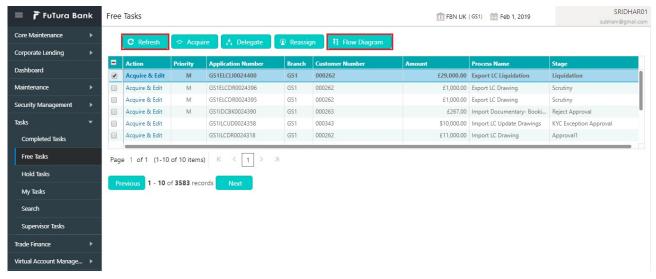
Following action can be performed on the Hold Tasks menu:

- 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.

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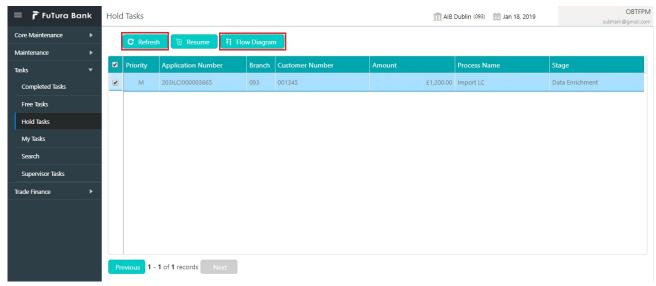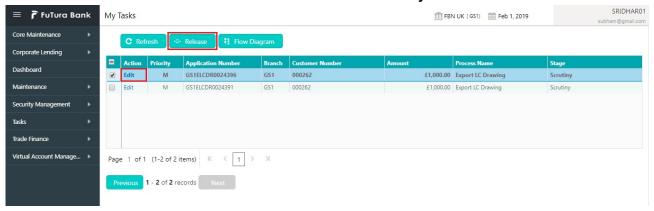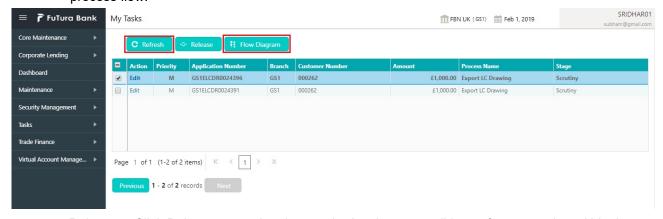
- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

Following action can be performed on the My Tasks menu:

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

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.
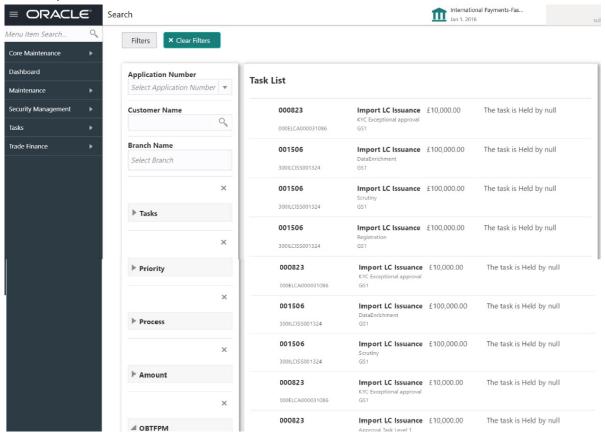
- Application Number

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- Customer Name
- Branch Name
- Tasks
- Priority
- Process
- Amount
- Contract Reference Number
- Other Bank Reference Number

Note

Contract Reference Number and Other Bank Reference Number is applicable only for OBTFPM product.
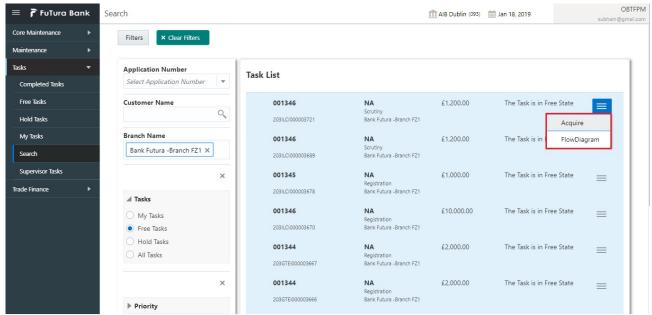

Following actions can be preformed on the tasks listed in the task list:

- 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.

Index

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Reference and Feedback

References

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

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

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