Task Menu User Guide

Oracle Flexcube Universal Banking

Release 14.4.0.1.0

Part No. F33267-01

August 2020

ORACLE

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

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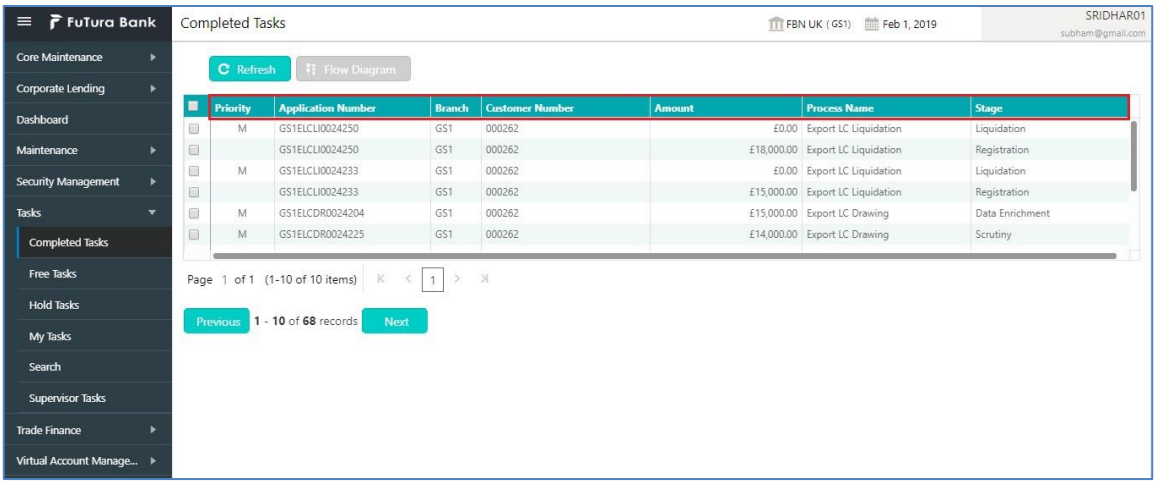

Following actions can be performed on the Completed Tasks menu:

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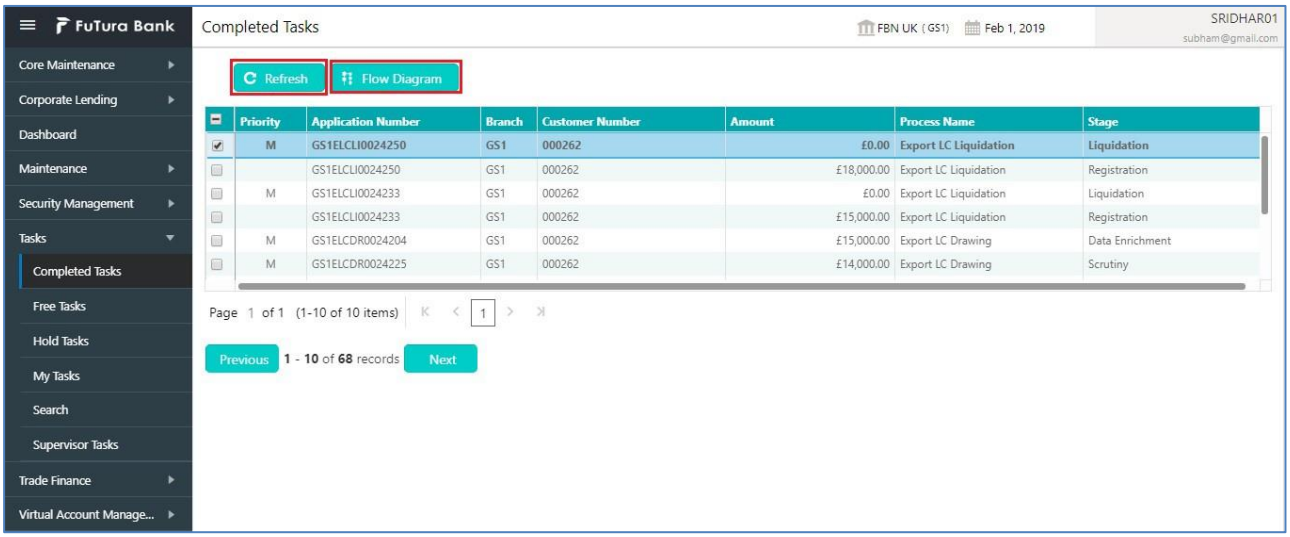
- Flow Diagram - Completed Tasks menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click Refresh to refresh the task list.



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.

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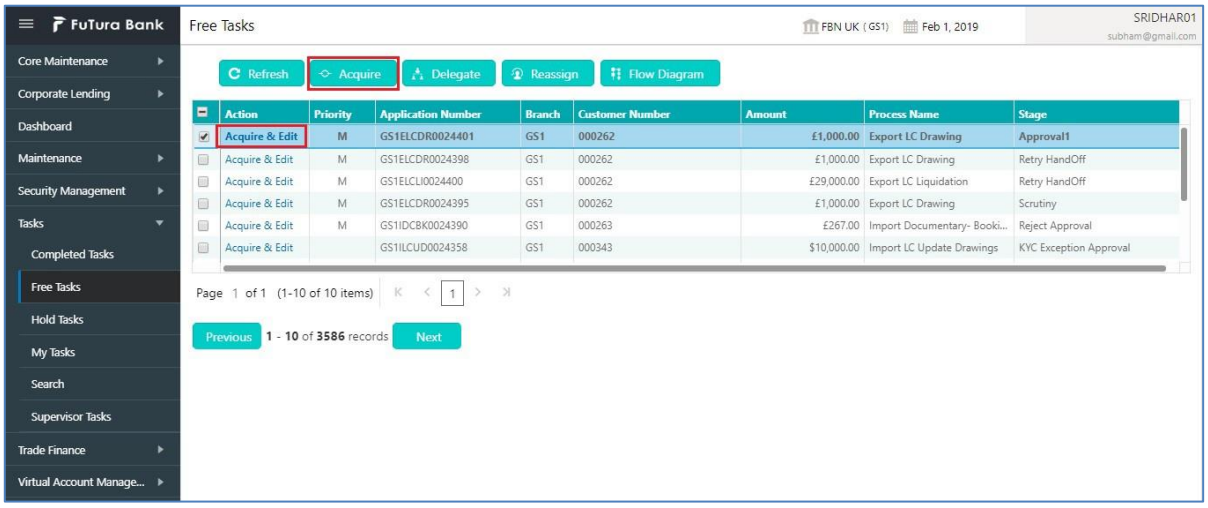
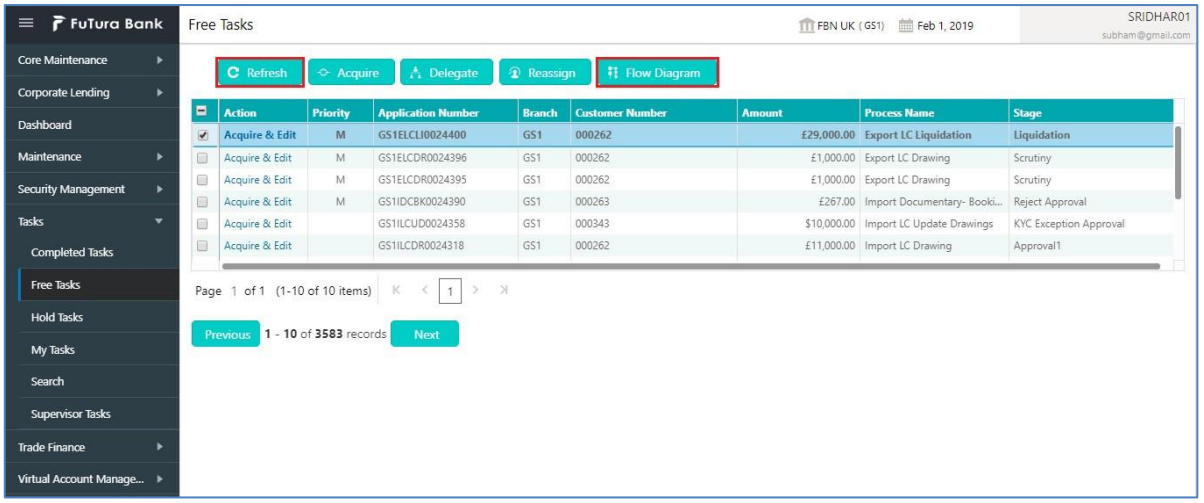
- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.



- 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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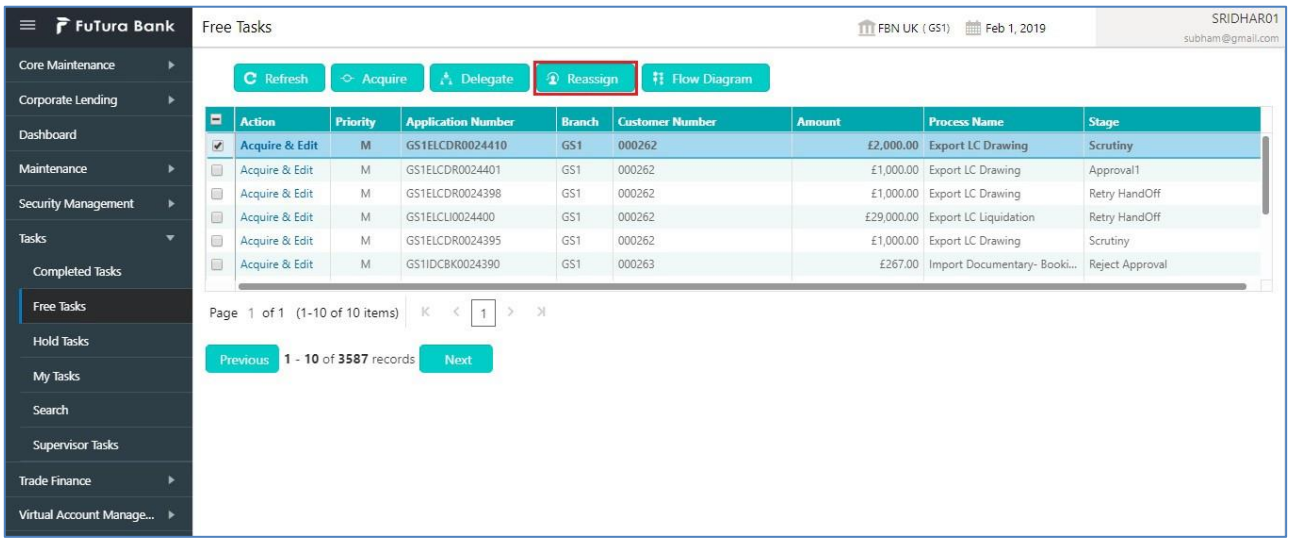

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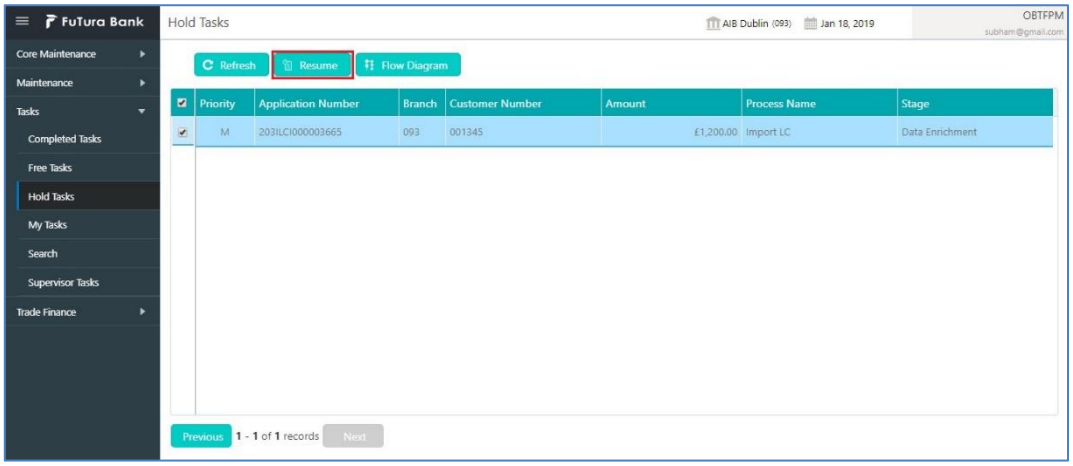
1.3 Hold Tasks

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:

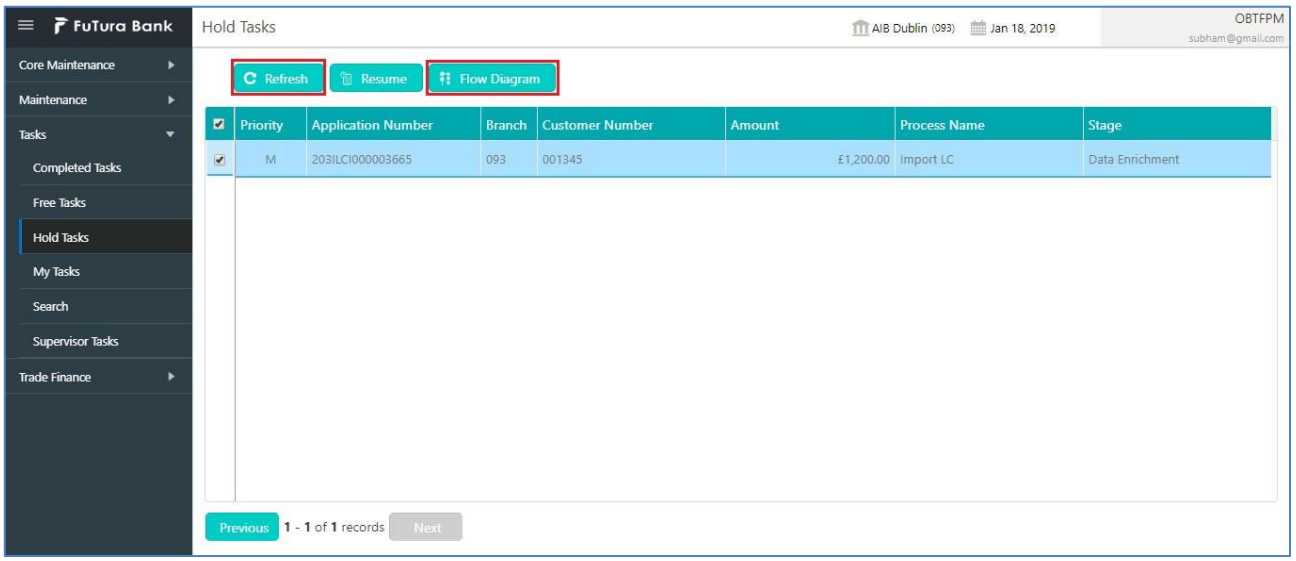
- Priority
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

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.

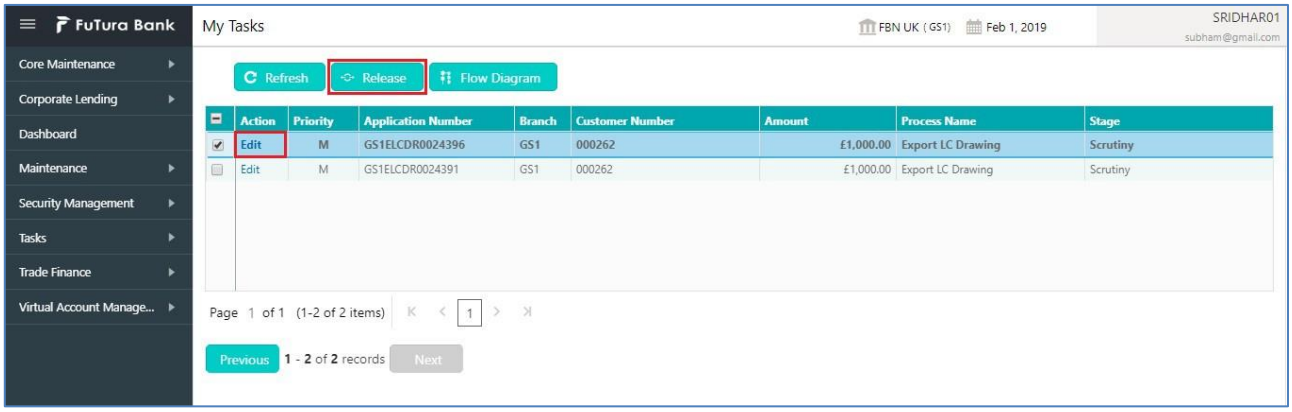
1.4 My Tasks

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

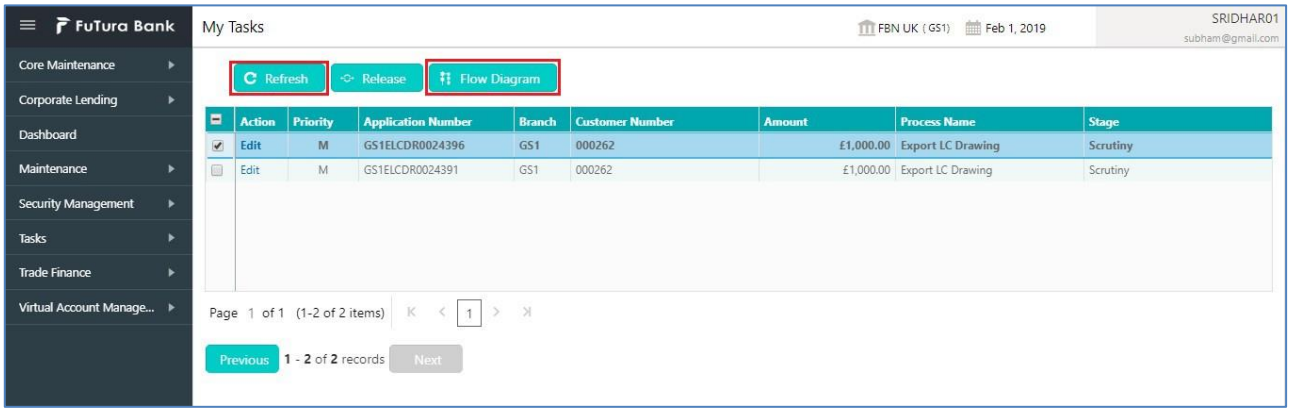
Following action can be performed on the My Tasks menu:

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



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.

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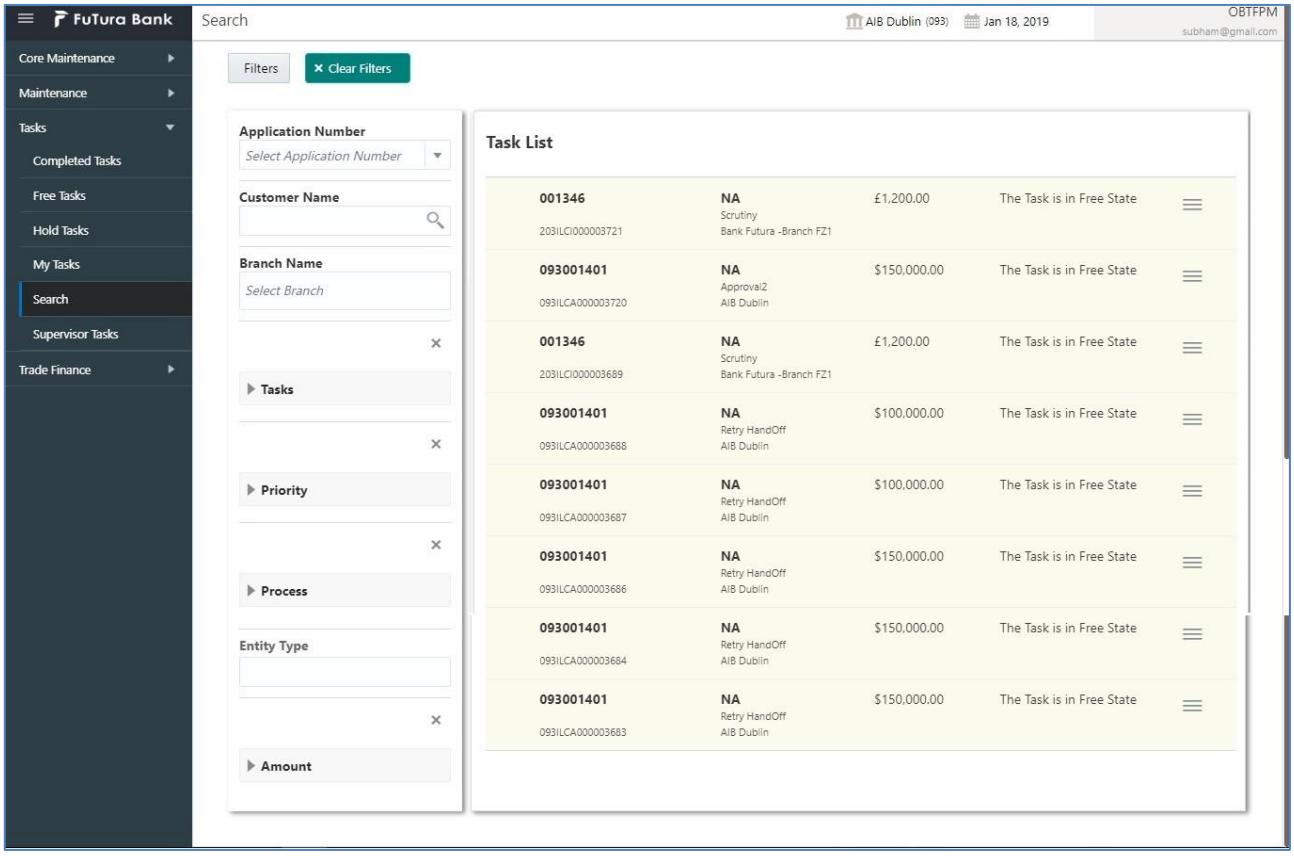
1.5 Search

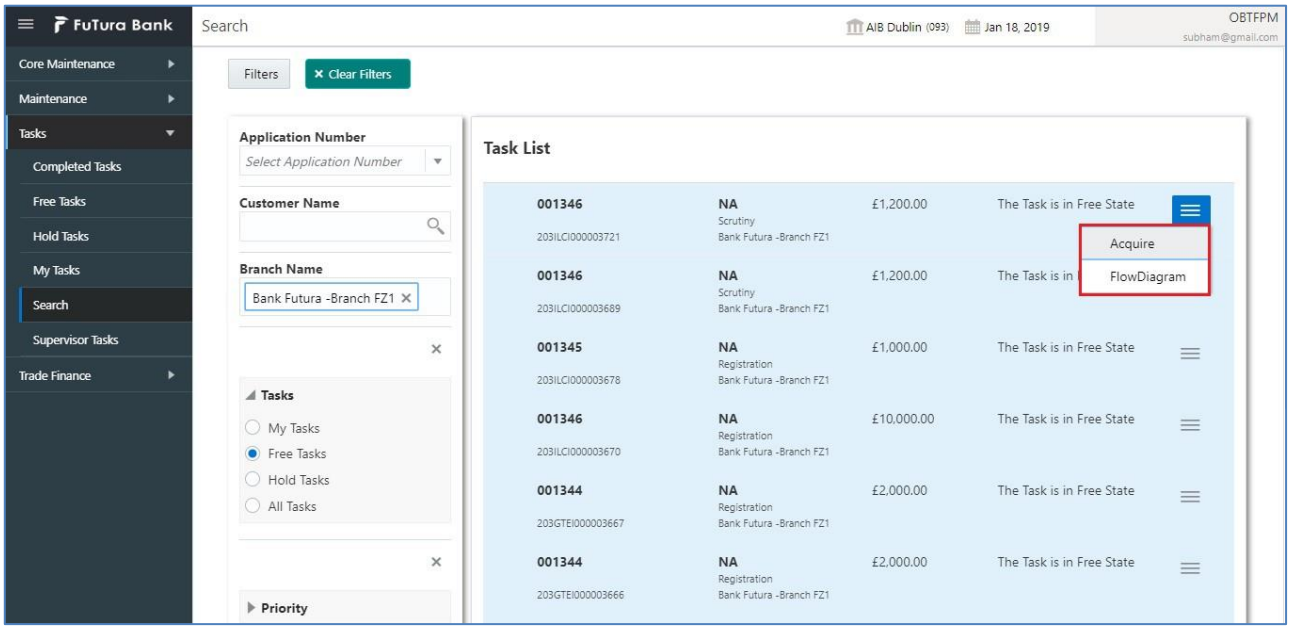
Search menu enables the user to search for the task(s) with the following filters. Search will fetch the results either will one filter criteria or with multiple filter criteria.

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



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.


FuTura Bank
Search
AIB Dublin (093)
Jan 18, 2019
OBTFPM
subham@gmail.com
Core Maintenance
Maintenance
Tasks
Completed Tasks
Free Tasks
Hold Tasks
My Tasks
Search
Supervisor Tasks
Trade Finance
Filters
Clear Filters
Application Number
Select Application Number
Customer Name
Branch Name
Bank Futura -Branch FZ1
Tasks
My Tasks
Free Tasks
Hold Tasks
All Tasks
Priority
Task List
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
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.

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