

Tasks User Guide

Oracle FLEXCUBE Onboarding

Release 14.4.0.0.0

Part Number F37096-01

January 2021

Tasks User Guide

Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway

Gurgaon (East)

Mumbai, Maharashtra 400 063

India

Worldwide Inquiries:

Phone: +91 22 6718 3000

Fax: +91 22 6718 3001

<https://www.oracle.com/industries/financial-services/index.html>

Copyright © 2021, Oracle and/or its affiliates. All rights reserved.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited. The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

1	Tasks.....	1
1.1	Completed Tasks	1
1.2	Free Tasks	3
1.3	Hold Tasks	5
1.4	My Tasks.....	6
1.5	Search	8
2	Reference and Feedback.....	10
2.1	References	10
2.1.1	Documentation Accessibility	10
2.2	Feedback and Support.....	10
3	Index.....	11

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 Completed Tasks](#)
- [1.2 Free Tasks](#)
- [1.3 Hold Tasks](#)
- [1.4 My Tasks](#)
- [1.5 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 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
- Application Number
- Branch
- Customer Number
- Amount
- Process Name
- Stage

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) 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 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) 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
<input checked="" 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	GS1ELCLU0024400	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
<input type="checkbox"/> Acquire & Edit		GS11LCUD0024358	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.

Free Tasks

Refresh Acquire Delegate Reassign Flow Diagram

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCLI0024400	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

Page 1 of 1 (1-10 of 10 items) Previous 1 - 10 of 3583 records Next

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

Free Tasks

Refresh Acquire Delegate Reassign Flow Diagram

Action	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
Acquire & Edit	M	GS1ELCDR0024410	GS1	000262	£2,000.00	Export LC Drawing	Scrutiny
Acquire & Edit	M	GS1ELCDR0024401	GS1	000262	£1,000.00	Export LC Drawing	Approval1
Acquire & Edit	M	GS1ELCDR0024398	GS1	000262	£1,000.00	Export LC Drawing	Retry HandOff
Acquire & Edit	M	GS1ELCLI0024400	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

Page 1 of 1 (1-10 of 10 items) Previous 1 - 10 of 3587 records Next

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.

The screenshot displays the 'Hold Tasks' menu in the FuTura Bank system. The interface includes a sidebar with navigation options like 'Core Maintenance', 'Maintenance', 'Tasks', 'Completed Tasks', 'Free Tasks', 'Hold Tasks', 'My Tasks', 'Search', 'Supervisor Tasks', and 'Trade Finance'. The main content area shows a table of tasks with the following columns: Priority, Application Number, Branch, Customer Number, Amount, Process Name, and Stage. A single task is listed with the following details:

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	2031LCI000003665	093	001345	£1,200.00	Import LC	Data Enrichment

At the top of the task list, there are buttons for 'Refresh', 'Resume', and 'Flow Diagram'. The 'Resume' button is highlighted with a red box. At the bottom of the table, there is a pagination control showing '1 - 1 of 1 records' with 'Previous' and 'Next' buttons.

- 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.

The screenshot shows the 'Hold Tasks' section of the FuTura Bank interface. The sidebar on the left lists various menu items, with 'Hold Tasks' currently selected. The main content area features a table with the following data:

Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
M	2031LC1000003665	093	001345	£1,200.00	Import LC	Data Enrichment

At the top of the table area, there are three buttons: 'Refresh', 'Resume', and 'Flow Diagram'. At the bottom, there are navigation buttons for 'Previous' and 'Next', and a status indicator '1 - 1 of 1 records'.

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.

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

- 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.

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

- 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 with navigation options: Core Maintenance, Maintenance, Tasks (with sub-options: Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search, Supervisor Tasks), and Trade Finance. The main area is titled 'Search' and includes a 'Filters' button and a 'Clear Filters' button. Below these are filter sections for Application Number, Customer Name, Branch Name, Tasks, Priority, Process, Entity Type, and Amount. The 'Task List' on the right shows a table of tasks with columns for ID, Status, Amount, and Description.

Application Number	Status	Amount	Description
001346 2031LCI000003721	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State
093001401 0931LCA000003720	NA Approval2 AIB Dublin	\$150,000.00	The Task is in Free State
001346 2031LCI000003689	NA Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State
093001401 0931LCA000003688	NA Retry HandOff AIB Dublin	\$100,000.00	The Task is in Free State
093001401 0931LCA000003687	NA Retry HandOff AIB Dublin	\$100,000.00	The Task is in Free State
093001401 0931LCA000003686	NA Retry HandOff AIB Dublin	\$150,000.00	The Task is in Free State
093001401 0931LCA000003684	NA Retry HandOff AIB Dublin	\$150,000.00	The Task is in Free State
093001401 0931LCA000003683	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.

The screenshot displays the FuTura Bank Tasks User Guide interface. On the left is a dark sidebar with navigation options: Core Maintenance, Maintenance, Tasks (selected), Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search, Supervisor Tasks, and Trade Finance. The main content area is titled 'Search' and includes a 'Filters' section with a 'Clear Filters' button. Below the filters are input fields for 'Application Number', 'Customer Name', and 'Branch Name' (set to 'Bank Futura -Branch FZ1'). A 'Tasks' section has radio buttons for 'My Tasks', 'Free Tasks' (selected), 'Hold Tasks', and 'All Tasks'. A 'Priority' section is also visible. The 'Task List' table on the right contains the following data:

Application Number	Task Name	Amount	Status	Actions
001346	Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in Free State	Acquire, FlowDiagram
203ILCI0000036721				
001346	Scrutiny Bank Futura -Branch FZ1	£1,200.00	The Task is in	
203ILCI0000036689				
001345	Registration Bank Futura -Branch FZ1	£1,000.00	The Task is in Free State	
203ILCI000003678				
001346	Registration Bank Futura -Branch FZ1	£10,000.00	The Task is in Free State	
203ILCI000003670				
001344	Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	
203GTEI000003667				
001344	Registration Bank Futura -Branch FZ1	£2,000.00	The Task is in Free State	
203GTEI000003666				

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

2.1.1 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

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 Index

Completed Tasks	1
Free Tasks.....	3
Hold Tasks.....	5
My Tasks	6
Search	8
Tasks.....	1