

Task Menu

Release 14.5.0.0.0

**Part No. F42343-01**

May 2021

Oracle Financial Services Software Limited

Oracle Park  
Off Western Express Highway  
Goregaon (East  
Mumbai, Maharashtra 400 063  
India

Worldwide Inquiries:

Phone: +91 22 6718 3000

Fax: +91 22 6718 3001

[www.oracle.com/financialservices/](http://www.oracle.com/financialservices/)

Copyright © 2018-2021, 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

- Task Menu .....4**
  - Completed Tasks ..... 4
  - Free Tasks ..... 5
  - Hold Tasks ..... 7
  - My Tasks ..... 8
  - Search ..... 8
- Reference and Feedback .....12**
  - References ..... 12
    - Documentation Accessibility ..... 12
  - Feedback and Support ..... 12

# 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:

<a href="#">Completed Tasks</a>	<a href="#">Free Tasks</a>
<a href="#">Hold Tasks</a>	<a href="#">My Tasks</a>
<a href="#">Search</a>	

## 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

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) K < 1 > X

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) | Previous 1 - 10 of 68 records Next

## 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	GS1ELCL0024400	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	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
<input type="checkbox"/> 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
<input checked="" type="checkbox"/> Acquire & Edit	M	GS1ELCL0024400	GS1	000262	£29,000.00	Export LC Liquidation	Liquidation
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024396	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1ELCDR0024395	GS1	000262	£1,000.00	Export LC Drawing	Scrutiny
<input type="checkbox"/> Acquire & Edit	M	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval
<input type="checkbox"/> Acquire & Edit		GS1ILCUD0024358	GS1	000343	\$10,000.00	Import LC Update Drawings	KYC Exception Approval
<input type="checkbox"/> 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.

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	GS1ELCL0024400	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	GS1IDCBK0024390	GS1	000263	£267.00	Import Documentary- Booki...	Reject Approval

# 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.

## 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.

The screenshot shows the FuTura Bank interface. On the left is a navigation menu with items like Core Maintenance, Corporate Lending, Dashboard, Maintenance, Security Management, Tasks, Trade Finance, and Virtual Account Manage... The main content area is titled 'My Tasks' and includes a header with 'FBN UK (GS1)', 'Feb 1, 2019', and 'SRIDHAR01 subham@gmail.com'. Below the header are three buttons: 'Refresh', 'Release', and 'Flow Diagram'. A table displays two task records:

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

Below the table is a pagination control showing 'Page 1 of 1 (1-2 of 2 items)' and '1' in a box, with 'Previous' and 'Next' buttons.

- 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.

This screenshot is identical to the one above, showing the FuTura Bank 'My Tasks' interface. The 'Refresh', 'Release', and 'Flow Diagram' buttons are highlighted with red boxes. The table and pagination controls are the same as in the previous screenshot.

- 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



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

The screenshot displays the FuTura Bank interface. On the left is a dark sidebar with navigation options: Core Maintenance, Maintenance, Tasks, Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search (highlighted), Supervisor Tasks, and Trade Finance. The main content area has a search bar and a filter panel. The filter panel includes sections for Application Number, Customer Name, Branch Name, Tasks, Priority, Process, Entity Type, and Amount. 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	☰
093001401 093ILCA000003720	NA Approval2 AIB Dublin	\$150,000.00	The Task is in Free State	☰
001346 203ILCI000003689	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.

The screenshot displays the FuTura Bank user 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 has a search bar and filter controls. The 'Task List' table contains the following data:

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

The 'Acquire' and 'FlowDiagram' options in the first row are highlighted with a red box. The interface also shows filter controls for Application Number, Customer Name, Branch Name, and Tasks (My Tasks, Free Tasks, Hold Tasks, All Tasks).

## C

Completed Tasks ..... 4

## F

Free Tasks ..... 5

## H

Hold Tasks ..... 7

## M

My Tasks ..... 8

## S

Search ..... 8

## T

Task Menu ..... 4

    Completed Tasks ..... 4

    Free Tasks ..... 5

    Hold Tasks ..... 7

    My Tasks ..... 8

    Search ..... 8

### References

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

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

### 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>.

### 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.