

Tasks User Guide

Oracle Banking Corporate Lending Process Management

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Tasks User Guide

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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 Awaiting Customer Clarification](#)
- [1.2 Completed Tasks](#)
- [1.3 Free Tasks](#)
- [1.4 Hold Tasks](#)
- [1.5 My Tasks](#)
- [1.6 Search](#)
- [1.7 Supervisor Tasks](#)
- [1.8 Business Process Maintenance](#)

1.1 Awaiting Customer Clarification

Awaiting Customer Clarification menu displays the tasks which are in awaiting customer clarification state. The task list will display the following details of the task:

- Action
- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 1: Awaiting Customer Clarification

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
<input type="checkbox"/> Edit	high	Savings Account Origin...	0005AVNEW0006137	000APP000014292	Application Enrichment	20-03-26	000	006096	

Page 1 of 1 (1 - 1 of 1 items) | K < 1 > X

1.2 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
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 2: Completed Tasks

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	
<input checked="" type="checkbox"/>	H	MANUALRECON	004271119REC5518	004271119REC5518	Master Update Retry	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5533	004271119REC5533	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5383	004271119REC5383	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5380	004271119REC5380	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC4373	004271119REC4373	Authorization	
<input type="checkbox"/>	H	MANUALRECON	004271119REC4336	004271119REC4336	Authorization	
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5396	004190221INV5396	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5390	004190221INV5390	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5389	004190221INV5389	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004180221INV5388	004180221INV5388	Authorization	19-11-27

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.

1.3 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
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 3: Free Tasks

The screenshot shows the Oracle Free Tasks interface. On the left is a navigation menu with categories like Security Management, Supply Chain Finance, Task Management, Tasks, Business Process Maintenance, Collections, Completed Tasks, Finance, Free Tasks, Hold tasks, Instruments, My Tasks, Recon, and Search. The main area displays a table of tasks. At the top of the table are buttons for Refresh, Acquire, and Flow Diagram. The table has the following columns: Action, Priority, Process Name, Process Reference Number, Application Number, Stage, and Application Date. The first row is selected, and the table contains 287 items in total, with the first page showing 20 items.

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20220	004240421INV20220	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20218	004240421INV20218	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20216	004240421INV20216	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20214	004240421INV20214	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20212	004240421INV20212	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20210	004240421INV20210	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20208	004240421INV20208	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20206	004240421INV20206	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20204	004240421INV20204	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20202	004240421INV20202	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20200	004240421INV20200	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20198	004240421INV20198	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20196	004240421INV20196	Authorization	19-11-27

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.
- 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.

1.4 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
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 4: Hold Tasks

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
H	INSTRUMENT	004211220PAY3683	004211220PAY3683	Authorization	19-11-27

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.

1.5 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
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- Customer Number
- Amount

Figure 5: My Tasks

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20030	004230421INV20030	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20029	004230421INV20029	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN185	004220421CN185	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN184	004220421CN184	Authorization	19-11-27
<input type="checkbox"/> Edit	H	CMS	004140421CW287	004140421CW287	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004090421INV1977	004090421INV1977	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004080421INV1968	004080421INV1968	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV1956	004070421INV1956	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV1953	004070421INV1953	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV1949	004070421INV1949	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV1946	004070421INV1946	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV1945	004070421INV1945	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004060421INV1913	004060421INV1913	Authorization	19-11-27

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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.
- Escalate - Task will be assigned to Supervisor

1.6 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

Figure 6: Search

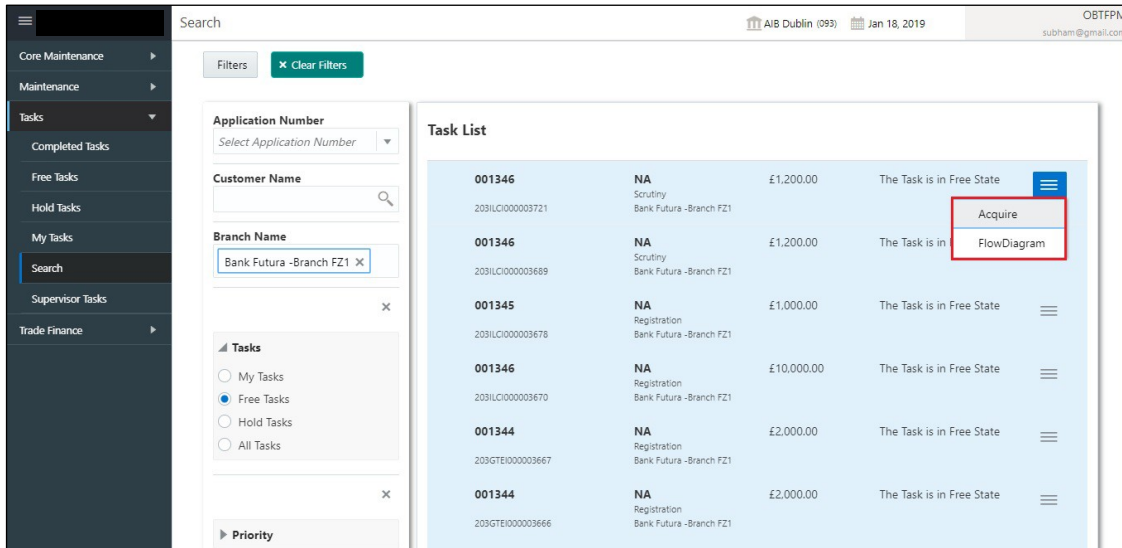
The screenshot displays a web application interface for searching tasks. On the left is a dark sidebar with a navigation menu including 'Core Maintenance', 'Maintenance', 'Tasks', 'Completed Tasks', 'Free Tasks', 'Hold Tasks', 'My Tasks', 'Search' (highlighted), 'Supervisor Tasks', and 'Trade Finance'. The main content area is titled 'Search' and includes a header with 'AIB Dublin (093)', 'Jan 18, 2019', and 'OBTFFPM subham@gmail.com'. Below the header are 'Filters' and 'Clear Filters' buttons. The filter section contains several input fields: 'Application Number' (with a dropdown), 'Customer Name' (with a search icon), 'Branch Name' (with a dropdown), 'Tasks' (with a dropdown and a close icon), 'Priority' (with a dropdown and a close icon), 'Process' (with a dropdown and a close icon), 'Entity Type' (with a dropdown and a close icon), and 'Amount' (with a dropdown and a close icon). To the right of the filters is a 'Task List' table with 10 rows. Each row contains an application number, a task name, a status, an amount, and a description. The status for all tasks is 'The Task is in Free State'. The table data is as follows:

Application Number	Task Name	Status	Amount	Description
001346	Scrutiny Bank Futura -Branch FZ1	The Task is in Free State	£1,200.00	203ILCI000003721
093001401	Approva2 AIB Dublin	The Task is in Free State	\$150,000.00	093ILCA000003720
001346	Scrutiny Bank Futura -Branch FZ1	The Task is in Free State	£1,200.00	203ILCI000003689
093001401	Retry HandOff AIB Dublin	The Task is in Free State	\$100,000.00	093ILCA000003688
093001401	Retry HandOff AIB Dublin	The Task is in Free State	\$100,000.00	093ILCA000003687
093001401	Retry HandOff AIB Dublin	The Task is in Free State	\$150,000.00	093ILCA000003686
093001401	Retry HandOff AIB Dublin	The Task is in Free State	\$150,000.00	093ILCA000003684
093001401	Retry HandOff AIB Dublin	The Task is in Free State	\$150,000.00	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.

Figure 7: Search – Task List



1.7 Supervisor Tasks

Supervisor Tasks menu will display 'User Tasks' or 'Free Tasks' based upon the option which is selected. The task list will display the following details of the task:

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

Figure 8: Supervisor Task

The screenshot shows the 'Supervisor Tasks' interface. At the top, there is a navigation bar with the Oracle logo, the text 'FLEXCUBE UNIVERSAL BAN...', the date 'May 6, 2019', and a user profile 'SUJANA01 subham@gmail.com'. Below the navigation bar, there are two radio buttons: 'User Tasks' (selected) and 'Free Tasks'. There are also four action buttons: 'Refresh', 'Release', 'Reassign', and 'Flow Diagram'. The main area contains a table with the following columns: Priority, Process Name, Process Reference Number, Application Number, Stage, and Application Date. The table has 10 rows of data. The first row is selected with a checkmark in the first column.

	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004721	PK2IDCB000004721	DataEnrichment	21-04-23
<input type="checkbox"/>	M	Export Documentary Co...	PK2EDCU000004543	PK2EDCU000004543	DataEnrichment	21-04-12
<input type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004704	PK2IDCB000004704	Registration	21-04-20
<input type="checkbox"/>	M	Import Documentary C...	PK2IDCB000004703	PK2IDCB000004703	Registration	21-04-20
<input type="checkbox"/>	M	Guarantee Claim Lodging	PK2GTEC000004683	PK2GTEC000004683	Scrutiny	21-04-19
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004642	PK2ILCU000004642	Scrutiny	21-04-16
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004604	PK2ILCU000004604	Scrutiny	21-04-15
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004603	PK2ILCU000004603	Scrutiny	21-04-15
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004601	PK2ILCU000004601	Scrutiny	21-04-15
<input type="checkbox"/>	M	Import LC Drawing	PK2ILCD000004561	PK2ILCD000004561	Scrutiny	21-04-13
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004483	PK2ILCU000004483	Scrutiny	21-04-08
<input type="checkbox"/>	M	Import LC Drawing Upd...	PK2ILCU000004439	PK2ILCU000004439	Scrutiny	21-04-07
<input type="checkbox"/>	M	Import Documentary C...	PK2IDCU000004310	PK2IDCU000004310	DataEnrichment	21-04-05

At the bottom of the table, there is a pagination bar showing 'Page 1 of 22 (1 - 20 of 429 items)' and navigation arrows.

Following actions can be performed on the Supervisor Tasks menu:

- Refresh – It will refresh the data on the grid.
- Release – Supervisor can release the task of his/her reportee and the task will be available in free task.
- Reassign - After selecting tasks from the task list, click **Reassign** button to reassign the selected tasks to any of the subordinates.
- Flow Diagram - Click **Flow Diagram** button to preview the flow diagram of the selected task.

1.8 Business Process Maintenance

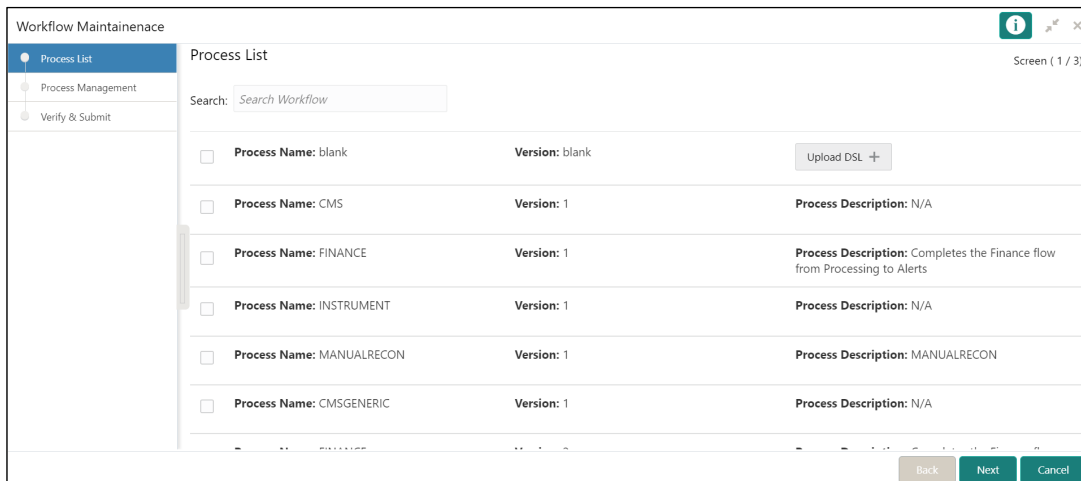
Business Process Maintenance menu allows the user to create Workflows. Basically, it comprises of three screens-

- [1.8.1 Process List Screen](#)
- [1.8.2 Process Management Screen](#)
- [1.8.3 Verify & Submit Screen](#)

1.8.1 Process List Screen

It shows the list of processes. User can select any one of the existing processes or a blank process can be selected in case the user wants to create a new workflow from scratch.

Figure 9: Process List



Following actions can be performed on the Process List screen:

Search – For searching any of the existing workflows/Process.

Upload DSL – Can be used to upload workflow in JSON format.

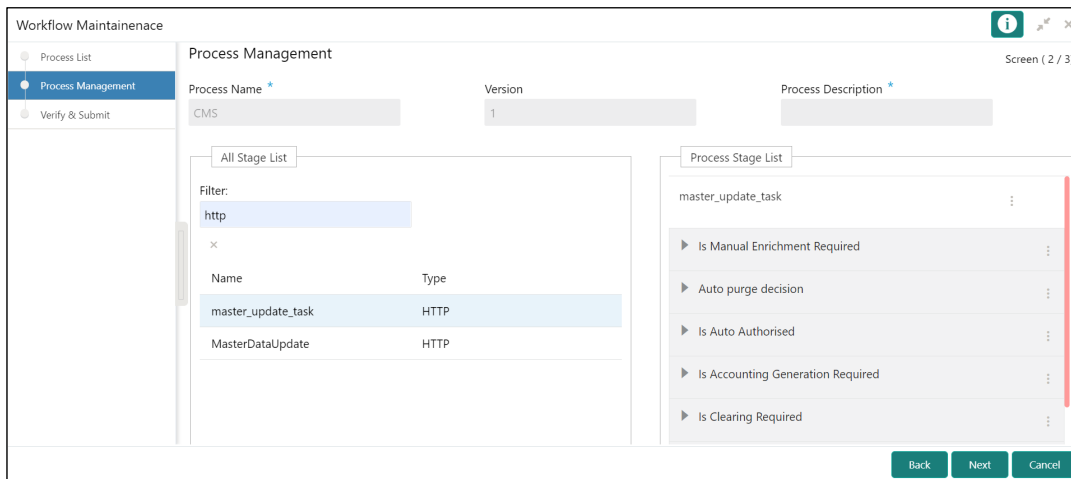
Next – After selecting one process, click **Next** button to navigate to the next screen “**Process Management**”.

Cancel – To exit from the Business Process Maintenance Menu.

1.8.2 Process Management Screen

It shows the list of the stages under the process, which was selected from the Process List screen, on the right under the heading “**Process Stage List**”. Also, all stages are listed in table on the left under the heading “**All Stage List**”.

Figure 10: Process Management



Drag and Drop Functionality:

To add new stages in the process, Drag and drop any stage from All Stage List to Process Stage List.

Creating a New Stage:

Click **Create Stage** button on the Process Management Screen to create new stage.

→ The **Create Task** screen is displayed.

The type of the stage can be changed in the core properties.

Figure 11: Create Task

Input Param	Values
FUNCTIONAL_CODE	
TASK_OUTCOMES	
APPLICATION_NO	\$(workflow.input.applicationN...
processRefNo	\$(workflow.input.processRefN...
lifecycleCode	

Core Properties	Core Values
name	
taskReferenceName	
type	WAIT
startDelay	0
optional	false
asyncComplete	false

Edit/Delete Functionality

Click **Edit** to Edit the stage in Process Stage List.

→ The **Modify Task** screen is displayed.

Click **Delete** to delete the stage from Process Stage List.

Figure 12: Process Management – Edit/Delete Functionality

Figure 13: Modify Task

Input Param	Values
DataIn	\$(AutoRegistrationViaOnlineTr...
RegistrationIn	\$(Registration.output)
workflowIn	\$(workflow.input)
DataEnrichmentIn	\$(DataEnrichment.output)
scriptExpression	if (\$DataEnrichmentIn != null)...

Core Properties	Core Values
name	ProcessingData
taskReferenceName	ProcessingData
type	LAMBDA
startDelay	0
optional	false
asyncComplete	false

Following actions can be performed on the Process Management screen:

Back – Click **Back** button to navigate to the previous screen.

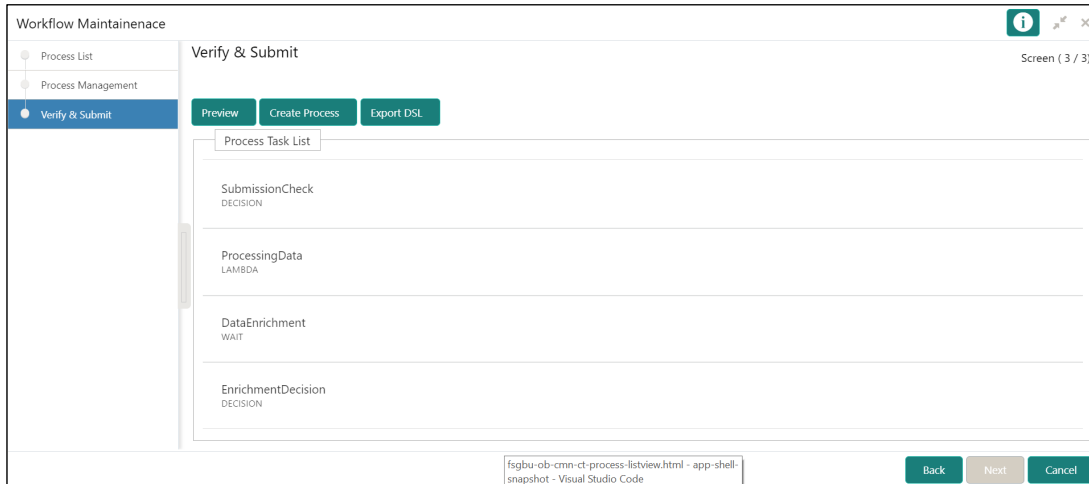
Next – After Modifying the stages, click **Next** button to navigate to the next screen “**Verify & Submit**”.

Cancel – To exit from the Business Process Maintenance Menu.

1.8.3 Verify & Submit Screen

Verify & Submit screen displays the process task list with all the new/modified tasks.

Figure 14: Verify & Submit



Following actions can be performed on the Process Management screen:

Preview button- Click **Preview** to view the flow diagram of the selected process.

Create Process button - Used to create new process. If an existing process is modified, a new process with updated version would appear on the process list screen or else a new process would appear.

Export DSL button - To Export DSL into a file in JSON format.

Back – Click **Back** button to navigate to the previous screen.

Cancel – To exit from the Business Process Maintenance Menu.

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 Error Codes and Messages

This topic contains the error codes and messages.

Table 1: Error Codes and Messages

Error Code	Messages
GCS-SAV-001	Record already exists
ORCH-0001	The system is unable to complete the task. Contact your supervisor.
ORCH-0002	Error in retrieving subordinates list.
ORCH-1001	Invalid operator is used in query criteria.
ORCH-1002	Found invalid field/s in query criteria. It allows only following fields (case sensitive):
ORCH-1003	Header or both headers are missing the request.
ORCH-1004	Invalid User/ branch in request.
ORCH-1005	Invalid query task type. Please use one of the given types:
ORCH-1006	Invalid task Id, please pass a valid task ID
ORCH-1007	TaskId should not be null, please pass a task Id in the body
ORCH-1008	In the body transaction model should not be empty
ORCH-1009	Current User cannot update the given task
ORCH-1010	Task which is completed cannot be updated.
ORCH-1011	Task must be in ACQUIRED state for update.
ORCH-1012	Invalid Supervisor/ branch in request.
file_error	Please upload json file only
select_error	Please select once process

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