Tasks User Guide

Oracle Banking Credit Facilities Process Management

Release 14.6.0.0.0

Part Number F57002-01

May 2022

ORACLE®

Tasks User Guide

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

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

ORACLE®

Contents

ORACLE®

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:

ORACLE®

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

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

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

ORACLE®

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.

ORACLE®

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
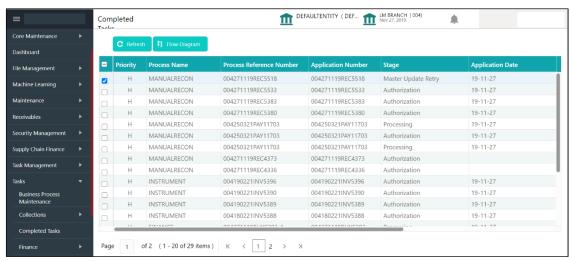
- Branch

- Customer Number

- Amount

Figure 4: Hold Tasks

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.
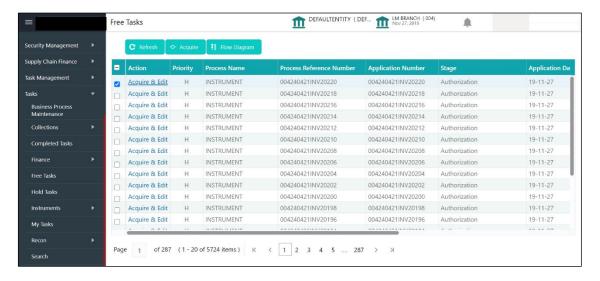
- Refresh - Click **Refresh** to refresh the task list.

ORACLE®

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

ORACLE®

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

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.
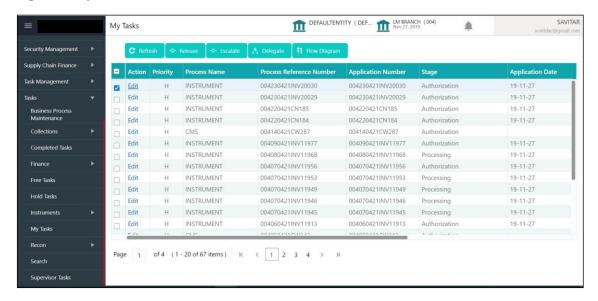
Figure 7: Search – Task List

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

ORACLE®

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.

ORACLE®

Figure 11: Create Task

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

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**".

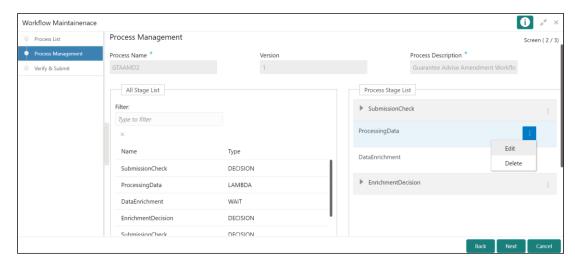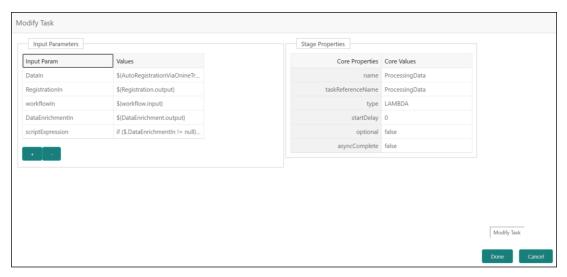Cancel – To exit from the Business Process Maintenance Menu.

ORACLE®

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.

ORACLE®

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

4   Index

ORACLE®