

Tasks User Guide

Oracle Banking Origination

Release 14.7.0.0.0

Part Number F72113-01

November 2022

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>

Copyright © 2021, 2022, 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	Awaiting Customer Clarification	2
1.2	Completed Tasks	3
1.3	Free Tasks	4
1.4	Hold Tasks	5
1.5	My Tasks	6
1.6	Search	8
1.7	Supervisor Tasks	10
1.8	SubProcess Tasks	11
1.9	Business Process Maintenance	12
1.9.1	Process List Screen	12
1.9.2	Process Management Screen	13
1.9.3	Verify & Submit Screen	16
2	Reference and Feedback	17
2.1	References	17
2.1.1	Documentation Accessibility	17
2.2	Feedback and Support	17
3	Error Codes and Messages	18
4	Index	19

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:

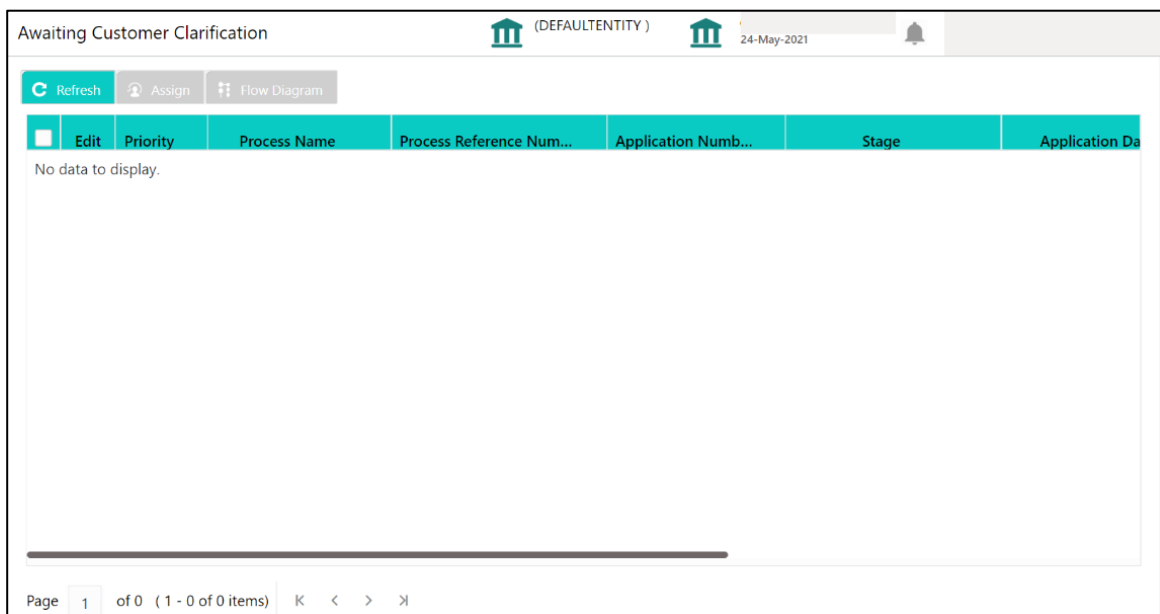
- [1.1 Awaiting Customer Clarification](#)
- [1.2 Completed Tasks](#)
- [1.3 Free Tasks](#)
- [1.4 Hold Tasks](#)
- [1.5 My Tasks](#)
- [1.6 Search](#)
- [1.7 Supervisor Tasks](#)
- [1.8 SubProcess Tasks](#)
- [1.9 Business Process Maintenance](#)

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

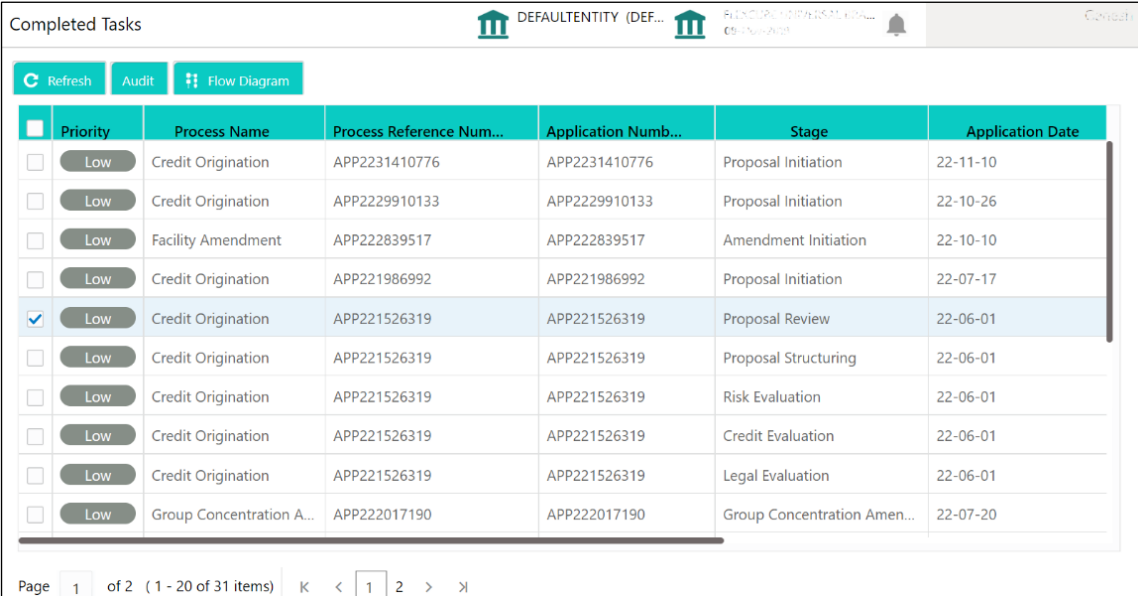


1.2 Completed Tasks

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



<input type="checkbox"/>	Priority	Process Name	Process Reference Num...	Application Numb...	Stage	Application Date
<input type="checkbox"/>	Low	Credit Origination	APP2231410776	APP2231410776	Proposal Initiation	22-11-10
<input type="checkbox"/>	Low	Credit Origination	APP2229910133	APP2229910133	Proposal Initiation	22-10-26
<input type="checkbox"/>	Low	Facility Amendment	APP222839517	APP222839517	Amendment Initiation	22-10-10
<input type="checkbox"/>	Low	Credit Origination	APP221986992	APP221986992	Proposal Initiation	22-07-17
<input checked="" type="checkbox"/>	Low	Credit Origination	APP221526319	APP221526319	Proposal Review	22-06-01
<input type="checkbox"/>	Low	Credit Origination	APP221526319	APP221526319	Proposal Structuring	22-06-01
<input type="checkbox"/>	Low	Credit Origination	APP221526319	APP221526319	Risk Evaluation	22-06-01
<input type="checkbox"/>	Low	Credit Origination	APP221526319	APP221526319	Credit Evaluation	22-06-01
<input type="checkbox"/>	Low	Credit Origination	APP221526319	APP221526319	Legal Evaluation	22-06-01
<input type="checkbox"/>	Low	Group Concentration A...	APP222017190	APP222017190	Group Concentration Amen...	22-07-20

Page 1 of 2 (1 - 20 of 31 items) K < 1 2 > X

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

<input type="checkbox"/>	Acquire & E...	Priority	Process Name	Process Reference Num...	Application Numb...	Stage	Appl
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231910980	APP2231910980	Proposal Initiation	22-11-15
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810921	APP2231810921	Proposal Initiation	22-11-14
<input checked="" type="checkbox"/>	Acquire & E...	Low	Collateral Evaluation	APP2231810913	APP2231810913	Enrichment	19-11-01
<input type="checkbox"/>	Acquire & E...	Low	Collateral Perfection	APP2231810912	APP2231810912	Enrichment	19-11-01
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810911	APP2231810911	Proposal Initiation	22-11-14
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810910	APP2231810910	Proposal Initiation	22-11-14
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810909	APP2231810909	Proposal Initiation	22-11-14
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810908	APP2231810908	Proposal Initiation	22-11-14
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810907	APP2231810907	Proposal Initiation	22-11-14
<input type="checkbox"/>	Acquire & E...	Low	Credit Origination	APP2231810906	APP2231810906	Proposal Initiation	22-11-14

Page 1 of 66 (1 - 20 of 1305 items) K < 1 2 3 4 5 ... 66 > >

Following action can be performed on the Free Tasks menu:

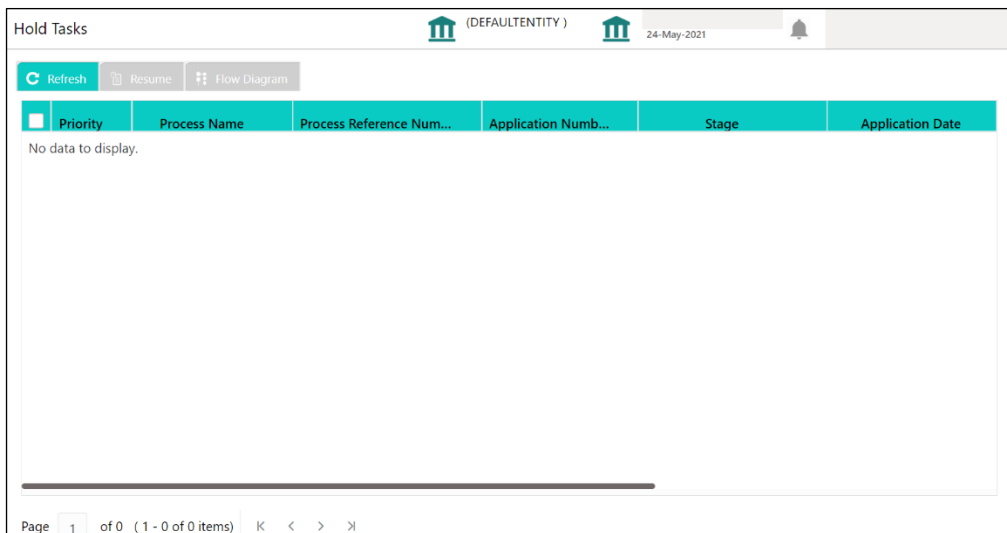
- Acquire & Edit - Click **Acquire & Edit** to acquire the task and edit directly from free tasks menu.
- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.
- Flow Diagram - Free Tasks menu enables user to view the process flow of the selected task and also 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



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

<input type="checkbox"/>	Edit	Priority	Process Name	Process Reference Num...	Application Numb...	Stage	Application t
<input type="checkbox"/>	Edit	Low	Facility Closure	APP2230710535	APP2230710535	Closure Initiation	22-11-03
<input type="checkbox"/>	Edit	Low	Facility Closure	APP2230710534	APP2230710534	Closure Initiation	22-11-03
<input type="checkbox"/>	Edit	Low	Facility Amendment	APP2230010218	APP2230010218	Amendment Initiation	22-10-27
<input type="checkbox"/>	Edit	Low	Facility Amendment	APP222839517	APP222839517	Amendment Enrichment	22-10-10
<input type="checkbox"/>	Edit	Low	Facility Amendment	APP222839516	APP222839516	Amendment Initiation	22-10-10
<input type="checkbox"/>	Edit	Low	Facility Amendment	APP222699046	APP222699046	Amendment Initiation	22-09-26
<input type="checkbox"/>	Edit	Low	Group Concentration A...	APP222528457	APP222528457	Group Concentration Amen...	22-09-09
<input type="checkbox"/>	Edit	Low	Credit Origination	APP222448227	APP222448227	Proposal Initiation	22-09-01
<input checked="" type="checkbox"/>	Edit	Low	Credit Origination	APP221986992	APP221986992	Proposal Enrichment	22-07-17
<input type="checkbox"/>	Edit	Medium	Credit Origination	APP222167757	APP222167757	Proposal Structuring	22-08-04

Page 1 of 2 (1 - 20 of 33 items) K < 1 2 > »

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 search interface with a sidebar on the left containing filters and a main 'Task List' table. The sidebar includes filters for Application Number, Customer Id, Party Id, Branch Name, Processes/Tasks (with radio buttons for My Tasks, Free Tasks, Hold Tasks, All Tasks, Active Processes, Completed Processes), Priority, Process, and Amount. The 'Task List' table contains the following data:

Application Number	Task Name	Amount	Description	Actions
05117 APP2231810834	Facility Closure Closure Initiation 000	\$2,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 14, 2022 11:59 PM	⋮
22705884 APP2231910856	Facility Amendment Amendment Initiation 000	\$1,00,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 11, 2022 12:08:14 PM	⋮
222996434 APP2231910857	Facility Amendment Amendment Initiation 000	\$50,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 11, 2022 12:07:12 PM	⋮
22455522 APP2231910852	Facility Review Process Facility Review Initiation 000	\$5,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 11, 2022 11:07:47 AM	⋮
222034967 APP2231910840	Group Concentration Extension Process Group Concentration Extension Initiation 000	\$25,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 11, 2022 9:10:37 AM	⋮
223146712 APP2231410776	Credit Origination Proposal Initiation 000	\$1,00,99,98,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 10, 2022 9:49:44 PM	⋮
222996434 APP2231410780	Facility Amendment Amendment Initiation 000	\$50,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 10, 2022 11:19:06 PM	⋮
223146711 APP2231410775	Credit Origination Proposal Initiation 000	\$0.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 10, 2022 11:27:19 AM	⋮
222996434 APP2231410786	Facility Amendment Amendment Initiation 000	\$50,00,000.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 10, 2022 10:11:40 AM	⋮
000409 APP2231210816	Facility Closure Closure Initiation 000	\$6,54,321.00	This task is acquired by GANESH(Ganesh) and last modified on Nov 8, 2022 12:00:49 PM	⋮

A context menu is open over the third task, showing options: Release, Edit, FlowDiagram, and Audit. The page footer indicates 'Page 1 of 4 (1 - 10 of 33 Items)' and a 'Fetch' button is visible at the bottom left.

Following actions can be performed on the tasks listed in the task list:

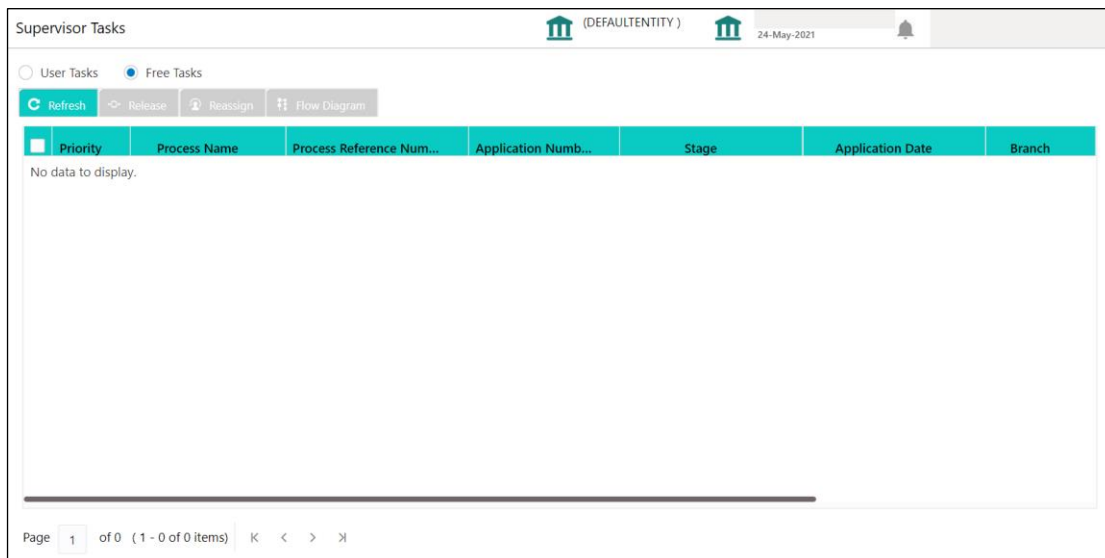
- Acquire and Edit - Click **Acquire and Edit** to acquire and edit the task.
- Flow Diagram - enables user to view the process flow of the selected task and the user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Audit – Click **Audit** to view the task history.
- Resume - Select the task and click **Resume** to move the task to **My Tasks** menu and edit.
- Edit – Click **Edit** to edit the selected task.
- Release - Click **Release** to release the selected task from **My Tasks** to **Free Tasks** menu.
- View – Click **View** to view the task in read only mode.

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
- Assigned To (in user tasks)

Figure 7: Supervisor Task



Following actions can be performed on the Supervisor Tasks menu:

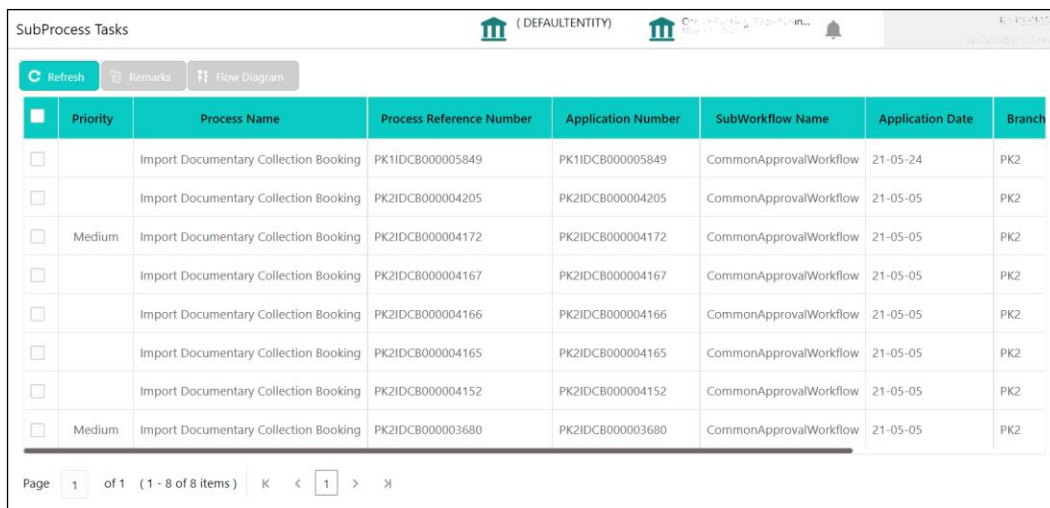
- Refresh – It will refresh the data on the grid.
- Release – Supervisor can release the task of his/her reportee and the task will be available in free task.
- Reassign - After selecting tasks from the task list, click **Reassign** button to reassign the selected tasks to any of the subordinates.
-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

1.8 SubProcess Tasks

SubProcess Tasks menu displays the tasks which are available in the subprocess which are accessed by the user based on the user rights. User can track the tasks which are available in the subprocess (it's a read only queue). The task list will display the following details of the task:

- Priority
- Process Name
- Process Reference Number
- Application Number
- SubWorkflow name
- Application Date
- Branch
- Customer Number
- Amount

Figure 8: SubProcess Tasks



	Priority	Process Name	Process Reference Number	Application Number	SubWorkflow Name	Application Date	Branch
<input type="checkbox"/>		Import Documentary Collection Booking	PK1IDCB000005849	PK1IDCB000005849	CommonApprovalWorkflow	21-05-24	PK2
<input type="checkbox"/>		Import Documentary Collection Booking	PK2IDCB000004205	PK2IDCB000004205	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>	Medium	Import Documentary Collection Booking	PK2IDCB000004172	PK2IDCB000004172	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>		Import Documentary Collection Booking	PK2IDCB000004167	PK2IDCB000004167	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>		Import Documentary Collection Booking	PK2IDCB000004166	PK2IDCB000004166	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>		Import Documentary Collection Booking	PK2IDCB000004165	PK2IDCB000004165	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>		Import Documentary Collection Booking	PK2IDCB000004152	PK2IDCB000004152	CommonApprovalWorkflow	21-05-05	PK2
<input type="checkbox"/>	Medium	Import Documentary Collection Booking	PK2IDCB000003680	PK2IDCB000003680	CommonApprovalWorkflow	21-05-05	PK2

Page 1 of 1 (1 - 8 of 8 Items) K < 1 > X

Following action can be performed on the SubProcess Tasks menu:

- Refresh - Click **Refresh** to refresh the task list.
- Remarks - Click **Remarks** to display the remarks associated with that selected task.
- 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.

1.9 Business Process Maintenance

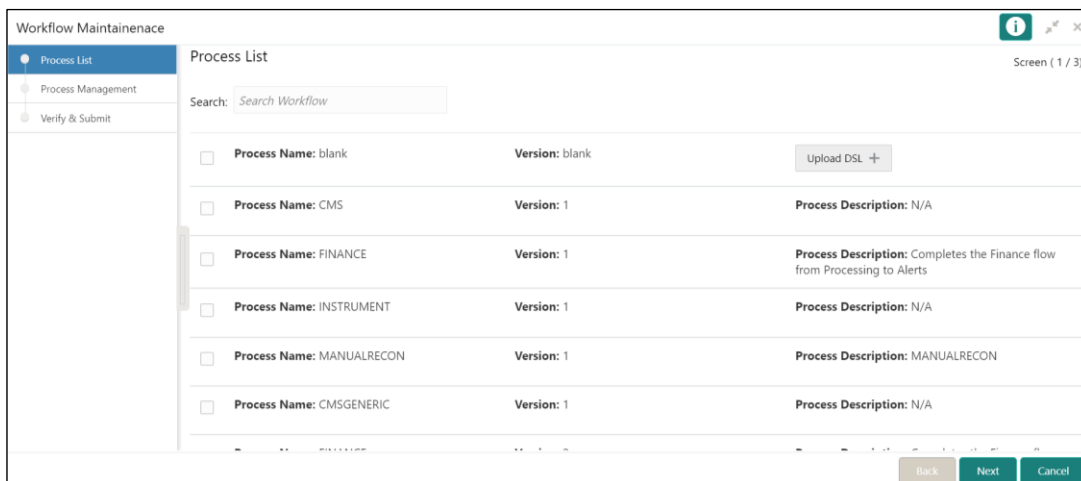
Business Process Maintenance menu allows the user to create Workflows. Basically, it comprises of three screens-

- [1.9.1 Process List Screen](#)
- [1.9.2 Process Management Screen](#)
- [1.9.3 Verify & Submit Screen](#)

1.9.1 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.

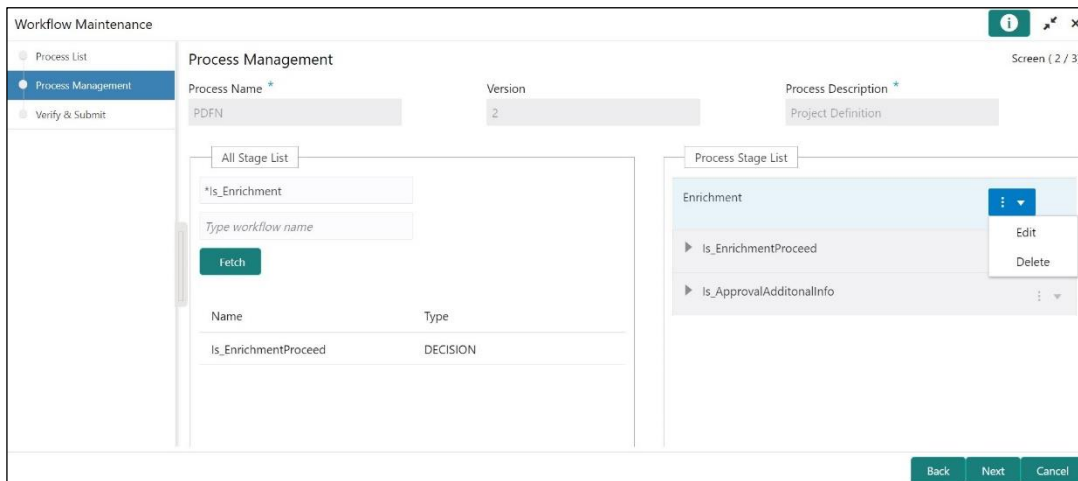
Next – After selecting one process, click **Next** button to navigate to the next screen “**Process Management**”.

Cancel – To exit from the Business Process Maintenance Menu.

1.9.2 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

The screenshot shows the 'Modify Task' dialog box with the following data:

Input Parameters		Stage Properties	
Input Param	Values	Core Properties	Core Values
DataIn	\$(AutoRegistrationViaOnlineTr...	name	ProcessingData
RegistrationIn	\$(Registration.output)	taskReferenceName	ProcessingData
workflowIn	\$(workflow.input)	type	LAMBDA
DataEnrichmentIn	\$(DataEnrichment.output)	startDelay	0
scriptExpression	if (\$DataEnrichmentIn != null)...	optional	false
		asyncComplete	false

Following actions can be performed on the Process Management screen:

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

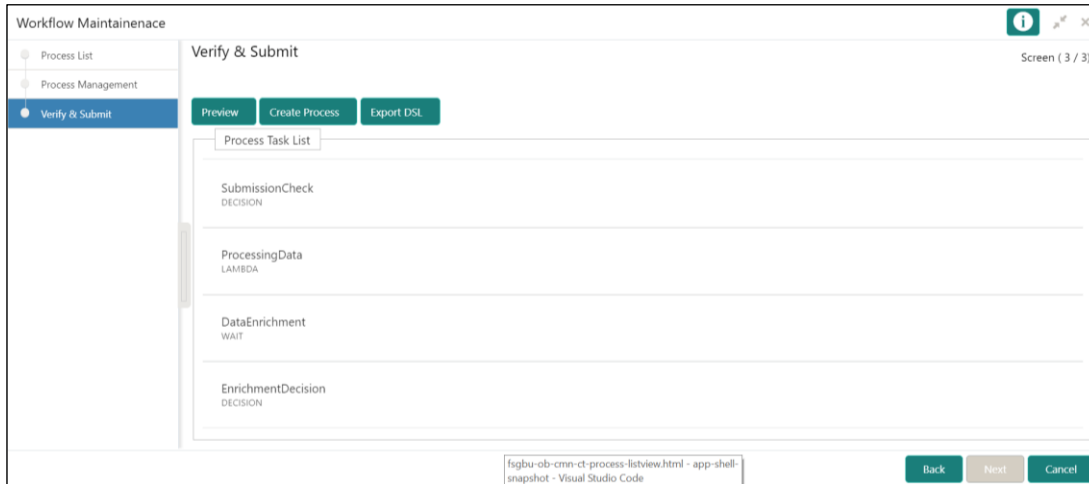
Next – After Modifying the stages, click **Next** button to navigate to the next screen “**Verify & Submit**”.

Cancel – To exit from the Business Process Maintenance Menu.

1.9.3 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

4 Index

Awaiting Customer Clarification	2
Business Process Maintenance	12
Completed Tasks	3
Free Tasks	4
Hold Tasks	5
My Tasks	6
Process List Screen	12
Process Management Screen.....	13
Search	8
Supervisor Tasks	10
Task Menu.....	1
Verify & Submit Screen	16