

Tasks User Guide

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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 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:

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

Figure 1: Awaiting Customer Clarification

☐	Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
No data to display.										
Page 1 of 0 (1 - 0 of 0 items) < 4 >										

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	Branch	Customer Number	Amount
Medium	Retail Loan Origination...	006VELN00026143	006APP000061557	Account Parameter Setup	18-03-30	006	006007061	£50,000.00
Medium	Retail Onboarding	231712946	006APP000060556	Approval	18-03-30	006	231712946	
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	CC Approval	18-03-30	006		£200,000.00
Medium	Retail Onboarding	231712946	006APP000060556	Recommendation	18-03-30	006	231712946	
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	CC Assessment	18-03-30	006		£200,000.00
Medium	Retail Onboarding	231712946	006APP000060556	KYC	18-03-30	006		
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	Application Entry	18-03-30	006		£200,000.00
Medium	Retail Application Initia...	006INIT000060556	006APP000060556	Application Initiation	18-03-30	006		
Medium	Retail Onboarding	231702870	006APP000060315	KYC	18-03-30	006		

Page 1 of 1 (1 - 14 of 14 items)

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:

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

Figure 3: Free Tasks

Free Tasks										
☐ Acquire & Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount	
☐ Acquire & Edit	Medium	CcOriginationProcess	006CCREWA0003198	006APP000006806	Application Entry	18-03-30	006	006007147	£60,000.00	
☐ Acquire & Edit	Medium	Retail Loan Originatio...	006HMLN010026217	006APP000006775	Application Entry	18-03-30	006		£56,222.00	
☐ Acquire & Edit	Medium	Small and Medium Bu...	0065MBCA10012712	006APP000006573	Overdraft Limit Details	18-03-30	006			
☐ Acquire & Edit	Medium	SMB Onboarding	23743136	006APP000006573	KYC	18-03-30	006			
☐ Acquire & Edit	Medium	Retail Loan Originatio...	006PRLN020026214	006APP000006770	Application Enrichment	18-03-30	006		£54,500.00	
☐ Acquire & Edit	Medium	Retail Application Init...	006NINT00006750	006APP000006750	Application Initiation	18-03-30	006			
☐ Acquire & Edit	Medium	Retail Loan Originatio...	006VELN010026185	006APP000006788	Account Parameter Setup	18-03-30	006	006007061	£50,000.00	
☐ Acquire & Edit	Medium	Retail Loan Originatio...	006HMLN010026186	006APP000006779	Application Entry	18-03-30	006	006007061	£12,109,192.00	
☐ Acquire & Edit	Medium	Retail Loan Originatio...	006VELN010026162	006APP000006190	Handoff Retry	18-03-30	006	006007061	£50,000.00	
☐ Acquire & Edit	Medium	SMB Loan Origination	0065MTL010026161	006APP000006189	Handoff Retry	18-03-30	006	006007065	£50,000.00	

Following action can be performed on the Free Tasks menu:

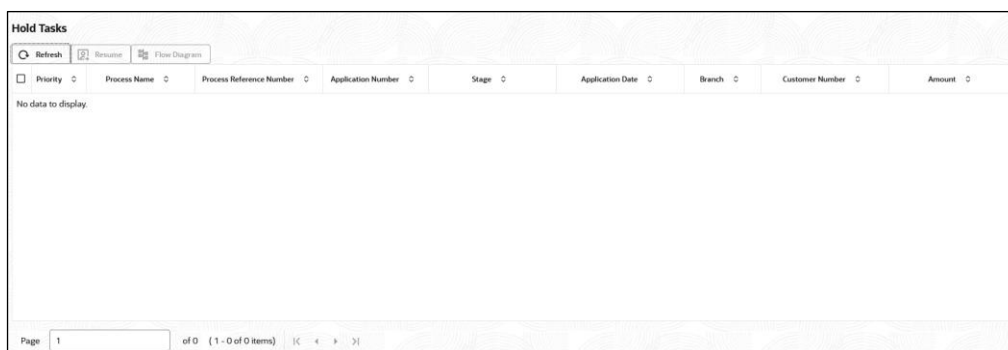
- Acquire & Edit - Click **Acquire & Edit** to acquire the task and edit directly from free tasks menu.
- Acquire - Select the task and click **Acquire** to edit the task later from **My Task** menu.
- Flow Diagram - Free Tasks menu enables user to view the process flow of the selected task and also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

My Tasks										
Refresh Release Escalate Delegate Flow Diagram										
☐	Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
☐	Edit		Retail Application Initi...	006INIT000006020	006APPO00006020	Application Initiation	18-03-30	006		
☐	Edit		Retail Application Initi...	006INIT000006004	006APPO00006004	Application Initiation	18-03-30	006		
☐	Edit	Medium	Small and Medium Bu...	006SMB5810016421	006APPO000061572	Application Entry	18-03-30	006	006007065	
☐	Edit	Medium	Retail Onboarding	231733107	006APPO000061556	KYC	18-03-30	006		
☐	Edit		SMB Loan Origination	006SMBL010026140	006APPO000061546	Application Entry	18-03-30	006		\$99,000.00
☐	Edit	Medium	Retail Onboarding	231733040	006APPO000061284	KYC	18-03-30	006		
☐	Edit	Medium	Retail Loan Originatio...	006ALHMLN0025429	006APPO000060315	Application Enrichment	18-03-30	006		£60,000.00
☐	Edit	Medium	Retail Loan Originatio...	006VELN010025285	006APPO000060057	Application Enrichment	18-03-30	006	006007061	£50,000.00
☐	Edit	Medium	Retail Loan Originatio...	006EDLN010025410	006APPO000060273	Application Entry	18-03-30	006	006007061	£50,000.00
☐	Edit		Current Account Origi...	006CURPCA0012495	006APPO000060142	Application Entry	18-03-30	006		
Page 1 of 4 (1 - 20 of 80 items) 1 2 3 4 >										

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, a 'Search' sidebar contains a 'Filters' section with a 'Clear Filters' button. Below this, several filter categories are listed, each with a search input field and a magnifying glass icon: 'Application Number' (with a dropdown menu), 'Customer Id', 'Party Id', 'Branch Name' (with a dropdown menu), 'Processes/Tasks', 'Priority', 'Process', and 'Amount'. Each filter category has a small 'X' icon to its right. At the bottom of the sidebar is a 'Fetch' button. The main area on the right is titled 'Task List' and shows 'No items to display.' Below this, there is a pagination bar indicating 'Page 1 of 0 (1 - 0 of 0 items)' with navigation arrows. The background of the interface features a subtle, repeating geometric pattern.

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

SubProcess Tasks									
Refresh Remarks Flow Diagram									
☐	Priority	Process Name	Process Reference Number	Application Number	SubWorkflow Name	Application Date	Branch	Customer Number	Amount
☐	Medium	SMB Onboarding	231745158	006APP0000061816	Approval	18-03-30	006		
☐	Medium	SMB Onboarding	231745158	006APP0000061816	Recommendation_Workflow	18-03-30	006		
☐	Medium	Retail Onboarding	231753120	006APP0000061657	Approval	18-03-30	006		
☐	Medium	Retail Onboarding	231753120	006APP0000061657	Recommendation	18-03-30	006		
☐	Medium	Retail Onboarding	231753119	006APP0000061610	Approval	18-03-30	006		
☐	Medium	Retail Onboarding	231753119	006APP0000061610	Recommendation	18-03-30	006		
☐	Medium	SMB Onboarding	231753115	006APP0000061570	Approval	18-03-30	006		
☐	Medium	SMB Onboarding	231753115	006APP0000061570	Recommendation_Workflow	18-03-30	006		
☐	Medium	Retail Onboarding	231753109	006APP0000061558	Approval	18-03-30	006		
Page 1 of 94 (1 - 20 of 1874 items) < 1 2 3 4 5 ... 94 >									

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

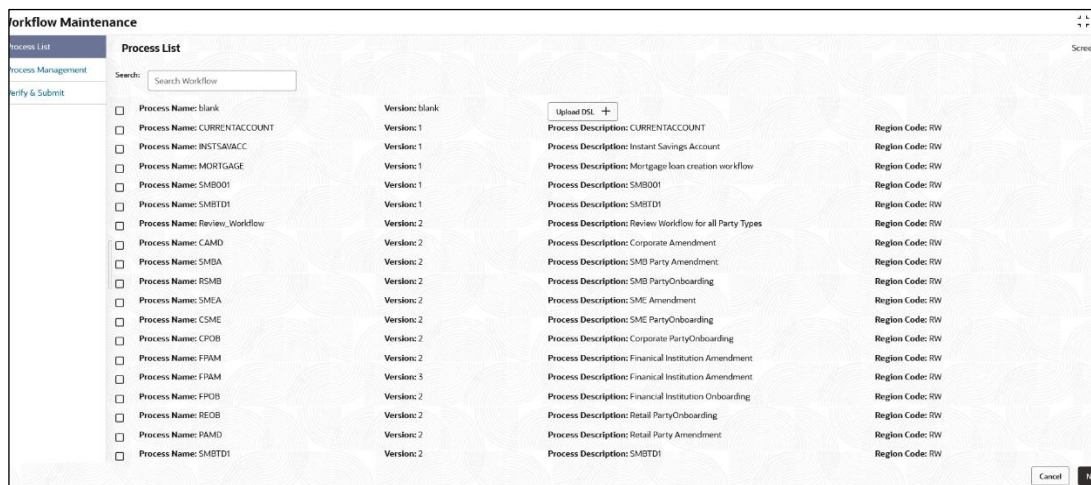
Business Process Maintenance menu allows the user to create Workflows. Basically, it comprises of three screens-

- [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.

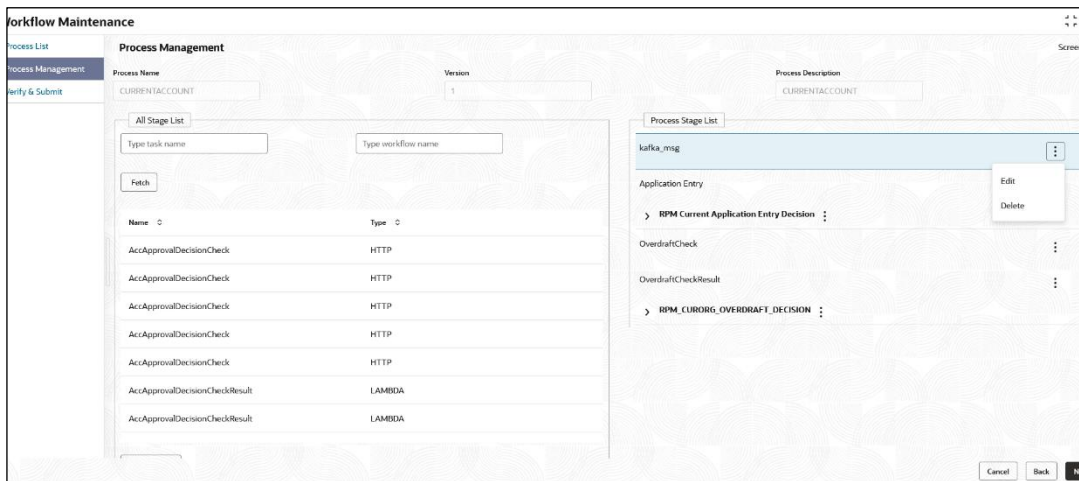
Next – After selecting one process, click **Next** button to navigate to the next screen “**Process Management**”.

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.

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 11: Process Management – Edit/Delete Functionality

The screenshot shows the 'Workflow Maintenance' application with the 'Process Management' tab selected. The 'Process Name' is 'CURRENTACCOUNT' and the 'Version' is '1'. The 'Process Description' is also 'CURRENTACCOUNT'. The 'All Stage List' table shows a list of stages with columns for Name and Type. The 'Process Stage List' shows a list of stages with columns for Name and Type. The 'kafka_msg' stage is selected, and a context menu with 'Edit' and 'Delete' options is visible.

Name	Type
AccApprovalDecisionCheck	HTTP
AccApprovalDecisionCheck	HTTP
AccApprovalDecisionCheck	HTTP
AccApprovalDecisionCheck	HTTP
AccApprovalDecisionCheck	HTTP
AccApprovalDecisionCheckResult	LAMBDA
AccApprovalDecisionCheckResult	LAMBDA

Name	Type
kafka_msg	
Application Entry	
RPM Current Application Entry Decision	
OverdraftCheck	
OverdraftCheckResult	
RPM_CURORG_OVERDRAFT_DECISION	

Figure 12: Modify Task

The screenshot shows the 'Modify Task' screen. The 'Input Parameters' section shows a table with columns for Input Param and Values. The 'Stage Properties' section shows a table with columns for Core Properties and Core Values.

Input Param	Values
kafka_request	[object Object]

Core Properties	Core Values
name	kafka_msg
taskReferenceName	KAFKA_RPM_CURACC_APPEN
type	KAFKA_PUBLISH
startDelay	0
optional	true
asyncComplete	false

Following actions can be performed on the Process Management screen:

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

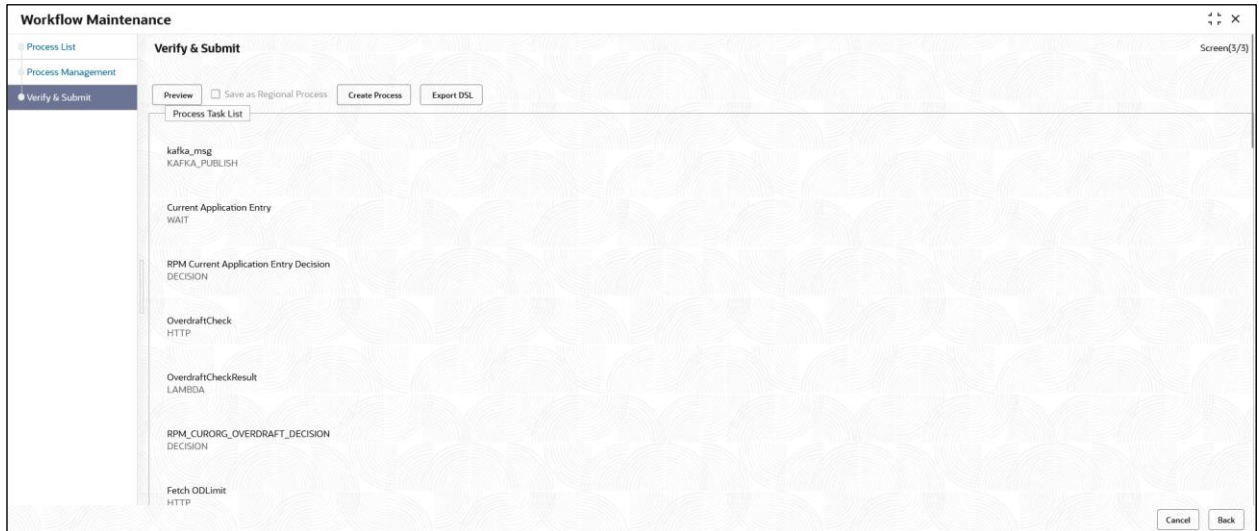
Next – After Modifying the stages, click **Next** button to navigate to the next screen “**Verify & Submit**”.

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 13: 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 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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