Task Menu

Oracle Banking Trade Finance Process Management

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Contents

1. Preface

1.1 Introduction

This user manual is designed to help you quickly get acquainted with Task Menu process in Oracle Banking Trade Finance Process Management.

1.2 Audience

This manual is intended for the following User/User Roles:

- Oracle Implementers
- Customer Service Representatives (CSRs)
- Oracle user

1.3 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.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1.4 Organization

This manual is organized into the following chapters:

- Preface gives information on the intended audience, structure, and related documents for this User Manual.
- The subsequent chapters provide an overview to the module.

1.5 Related Documents

- Getting Started User Guide
- Common Core User Guide

1.6 Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry

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standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

1.7 Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.8 Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

1.9 Glossary of Icons

This User Manual may refer to all or some of the following icons.

Icons	Function
✕	Exit
+	Add row
—	Delete row
🔍	Option List

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2. 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:

2.1 Awaiting Customer Clarification

The Awaiting Customer Clarification menu displays the tasks that are in the waiting for customer clarification state.

The following information is displayed on the task list:

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

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- Amount

2.2 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 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
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Number
- Branch
- Reference Number
- Customer Number
- Amount

Following actions can be performed on the Completed Tasks menu:

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- 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.

- The user can select the check box and click on Audit to view the details of the task's audits.
- The Task Audit Trail Details screen is displayed with the task details.

2.3   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

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- Reference Number
- Customer Number
- Amount

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.

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- Reassign- Click **Reassign** to the task to sub-ordinates. This action can be performed only if user is provided with the assignment rights.

2.4   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
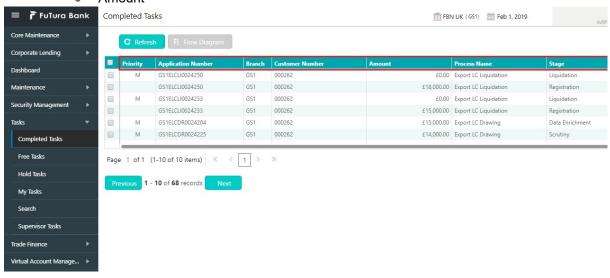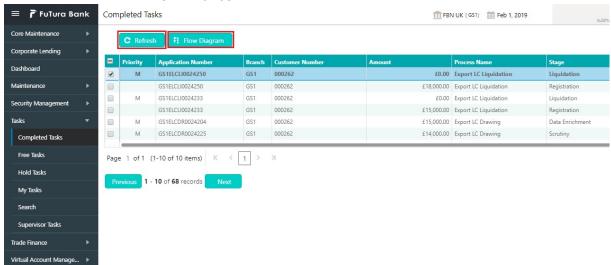- Stage
- Application Date
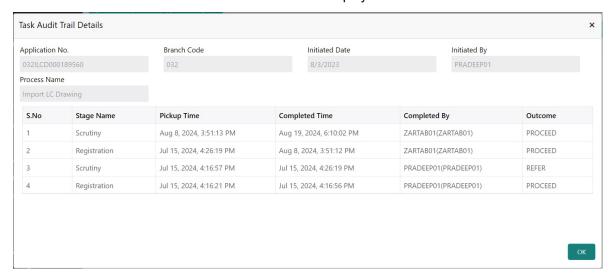- Branch
- Reference Number
- Customer Number
- Amount

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.

	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
☑	M	203ILCI000003665	093	001345	£1,200.00	Import LC	Data Enrichment

- 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.

	Priority	Application Number	Branch	Customer Number	Amount	Process Name	Stage
☑	M	203ILCI000003665	093	001345	£1,200.00	Import LC	Data Enrichment

2.5 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:

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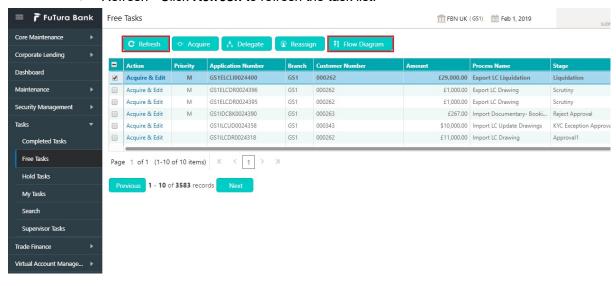- Application Number
- Stage
- Application Date
- Branch

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- Reference Number
- Customer Number
- Amount

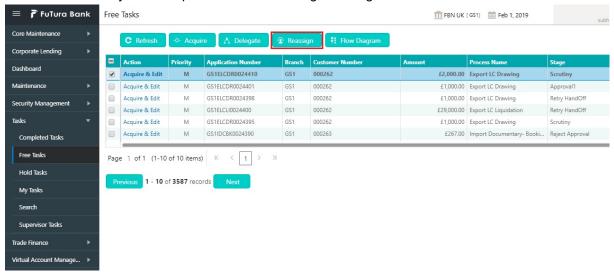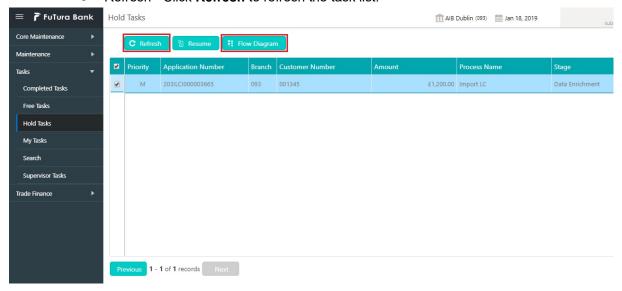Following action can be performed on the My Tasks menu:

- 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.

2.6 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 ID
- Party ID
- Branch Name
- Processes/Tasks
- Priority

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- Process
- Amount

Note

Contract Reference Number and Other Bank Reference Number is applicable only for OB-TFPM product.

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

- Acquire - Click Acquire to acquire the task.

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- 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.

2.7   Supervisor Tasks

Supervisor Tasks menu displays the 'User Tasks' or 'Free Tasks' based upon the option that is selected.

The following information is displayed on the task list:

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

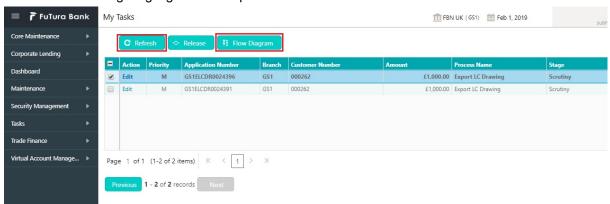ORACLE®

- Amount

Following actions can be performed on the Supervisor Task menu:

- Refresh - It will refresh the data on the grid.
- Release - Supervisor can release the task of his/her report 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.

2.8   Business Process Maintenance

This topic describes the systematic instruction to create the workflows.

It comprises of the following three screens:

- Process List Screen
- Process Management Screen
- Verify & Submit Screen

Specify User ID and Password, and login to Home screen.

2.8.1   Process List

The Process List screen shows a list of processes. The user can select any of the existing processes. A blank process can also be selected in case the user wants to create a new workflow.

1.   On **Home** screen, click Task Management. Under Tasks, click Business Process Maintenance.

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- The Process List screen displays.

2. Select the required process and perform any one of the following actions:

-   Click **Next** to navigate to the next screen.
-   Click **Search** to search for any of the existing workflows/processes.
-   Click **Upload DSL** button to upload a workflow in JSON format.
-   Click **Cancel** button to exit the Business Process Maintenance screen.

2.8.2   Process Management

The Process Management screen displays 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.

3. Click **Next**.

The **Process Management** screen displays.

4. Drag and drop any stage from the All Stage List to the Process Stage List to add new stages in the process. The user can also perform the following actions in the Process Management screen:

- Click More Options and select Edit to edit a stage in the Process Stage List.
- The Modify Task screen displays.

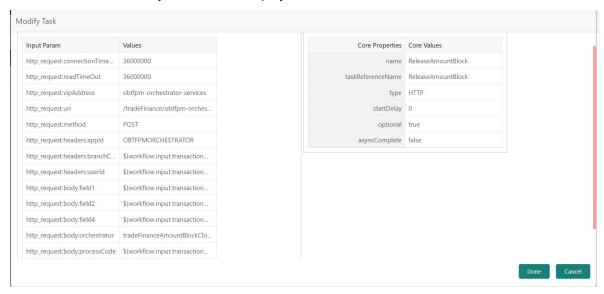| Input Param	Values		Core Properties	Core Values
http_request:connectionTime...	36000000		name	ReleaseAmountBlock
http_request:readTimeOut	36000000		taskReferenceName	ReleaseAmountBlock
http_request:vipAddress	obtfpm-orchestrator-services		type	HTTP
http_request:uri	/tradeFinance/obtfpm-orches...		startDelay	0
http_request:method	POST		optional	true
http_request:headers:appId	OBTFPMORCHESTRATOR		asyncComplete	false
http_request:headers:branchC...	${workflow.input.transaction...			
http_request:headers:userId	${workflow.input.transaction...			
http_request:body:field1	${workflow.input.transaction...			
http_request:body:field2	${workflow.input.transaction...			
http_request:body:field4	${workflow.input.transaction...			
http_request:body:orchestrator	tradeFinanceAmountBlockClo...			
http_request:body:processCode	${workflow.input.transaction...			

Modify Task

Done   Cancel

- Click More Options and select **Delete** to delete a stage from the Process Stage List.

5. Perform one of the following action on the Process Management screen.

- Click Next to navigate to the next screen after modifying the stages.
- Click Back to navigate to the previous screen.
- Click Cancel to exit the Business Process Maintenance screen.

2.8.3 Verify & Submit

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

6. Click **Next**.

- The **Verify & Submit** screen displays.

7. Perform one of the following actions in the Verify & Submit screen.

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

    ●   **Create Process** – Click this button to create a new process. If an existing process is modified, a new process with updated version appears in the process list.

    ●   **Export DSL** – Click this button to export DSL into a file in JSON format.

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

    ●   **Cancel** – Click this button to exit the Business Process Maintenance screen.

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3. A Errors Codes and Messages

The following is the list of Error Codes and Messages:

Error Codes	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	Task Id 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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4. B Functional Activity Codes

This topic describes about the functional activity for Plato Services.

Screen Name	Functional Activity Codes	Action	Description
Tasks	CMC_FA_SUBMENU_1_Awaiting	Awaiting	Awaiting Confirmation Menu
Tasks	CMC_FA_MENU_Tasks	Menu	Task Menu
Tasks	CMC_FA_SUBMENU_1_Completed	Completed	Completed Task Menu
Tasks	CMC_FA_SUBMENU_1_FreeTasks	Free Task	Free Task Menu
Tasks	CMC_FA_SUBMENU_1_HoldTasks	Hold Tasks	Hold Task Menu
Tasks	CMC_FA_SUBMENU_1_MyTasks	MyTasks	My Task Menu
Tasks	CMC_FA_SUBMENU_1_SEARCH	Search	Task Search
Tasks	CMC_FA_SUBMENU_1_Supervisor	Supervisor	Supervisor Task Menu
Tasks	CMC_FA_SUBMENU_1_WORKFLOW_MAINT	Workflow Maintenance	Workflow Maintenance
Tasks	CMC_FA_CONFIGPROP	Configprop	Configprop Task
Tasks	CMC_FA_SUBMENU_1_Subprocess	Subprocess	Subprocess Task Menu

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