Oracle® Banking Microservices Architecture

Tasks User Guide

Release 14.7.5.0.0
G16741-02
September 2024

Oracle Banking Microservices Architecture Tasks User Guide, Release 14.7.5.0.0

G16741-02

Contents

1 Tasks

1.1 Awaiting Customer Clarification 1-1
1.2 Completed Tasks 1-2
1.3 Free Tasks 1-3
1.4 Hold Tasks 1-5
1.5 My Pending Tasks 1-6
1.6 My Tasks 1-7
1.7 Search 1-8
1.8 Servicing Transaction Inquiry 1-9
1.9 Branch Servicing Pending Transactions View 1-11
1.10 Supervisor Tasks 1-12
1.11 Business Process Maintenance 1-13

A Errors Codes and Messages

B Functional Activity Codes

Index

Preface

- Purpose
- Audience
- Documentation Accessibility
- Critical Patches
- Diversity and Inclusion
- Related Resources
- Conventions
- Screenshot Disclaimer
- Basic Actions
- Symbols and Icons

Purpose

This guide provides an overview of the tasks that are accessed by the user and takes you through the various steps involved in handling all the necessary activities in performing the various tasks.

Audience

This guide is intended for the User/User Roles.

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.

Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at Critical Patches, Security Alerts and Bulletins. All critical patches should be applied in a timely manner to make sure effective security, as strongly recommended by Oracle Software Security Assurance.

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

Related Resources

For more information on any related features, refer to the following documents

- *Oracle Banking Getting Started User Guide*

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 or the glossary.
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.

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.

Basic Actions

Table Basic Actions

Action	Description
Approve	Used to approve the initiated report. This button is displayed, once the user click **Authorize**.
Audit	Used to view the maker details, checker details, and report status.
Authorize	Used to authorize the report created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a report, created by a maker.
Close	Used to close a record. This action is available only when a record is created.
Confirm	Used to confirm the performed action.
Cancel	Used to cancel the performed action.
Compare	Used to view the comparison through the field values of old record and the current record. This button is displayed in the widget, once the user click **Authorize**.

Table (Cont.) Basic Actions

Action	Description
Collapse All	Used to hide the details in the sections. This button is displayed, once the user click **Compare**.
Expand All	Used to expand and view all the details in the sections. This button is displayed, once the user click **Compare**.
New	Used to add a new record. When the user click **New**, the system displays a new record enabling to specify the required data. **Note:** The fields which are marked with asterisk are mandatory.
OK	Used to confirm the details in the screen.
Save	Used to save the details entered or selected in the screen.
View	Used to view the report details in a particular modification stage. This button is displayed in the widget, once the user click **Authorize**.
View Difference only	Used to view a comparison through the field element values of old record and the current record, which has undergone changes. This button is displayed, once the user click **Compare**.
Unlock	Used to update the details of an existing record. System displays an existing record in editable mode.

Symbols and Icons

The following symbols and icons are used in the screens.

Table Symbols and Icons - Common

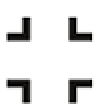
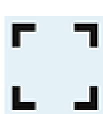
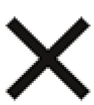
Symbol/Icon	Function
	Minimize
	Maximize
	Close

Table (Cont.) Symbols and Icons - Common

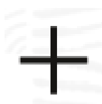
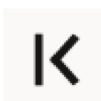
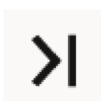
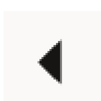
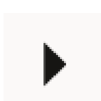
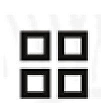
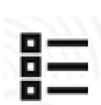
Symbol/Icon	Function
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view

Table (Cont.) Symbols and Icons - Common

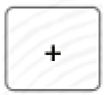
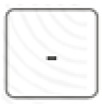
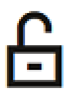
Symbol/Icon	Function
	Refresh
	Click this icon to add a new row.
	Click this icon to delete an existing row.
	Click to view the created record.
	Click to modify the fields.
	Click to unlock, delete, authorize or view the created record.

Table Symbols and Icons - Audit Details

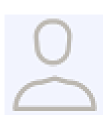
Symbol/Icon	Function
	A user
	Date and time

Table (Cont.) Symbols and Icons - Audit Details

Symbol/Icon	Function
	Unauthorized or Closed status
	Authorized or Open status

1
Tasks

The task menu has multiple submenus. Based on the user role, the submenus can be accessed by the user.

The following sections are included in the task menu:

- Awaiting Customer Clarification
- Completed Tasks
- Free Tasks
- Hold Tasks
- My Pending Tasks
- My Tasks
- Search
- Servicing Transaction Inquiry
- Branch Servicing Pending Transactions View
- Supervisor Tasks
- Business Process Maintenance
  This topic describes the systematic instruction to create the workflows.

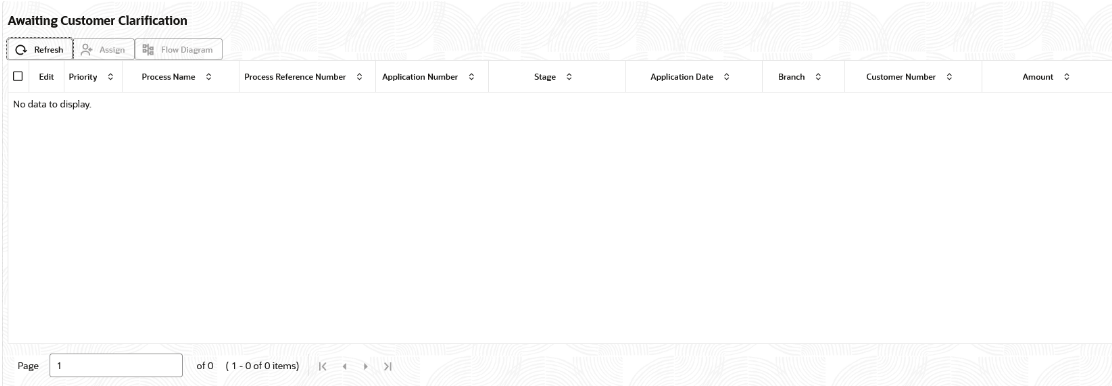
1.1 Awaiting Customer Clarification

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**
- **Amount**

Figure 1-1 Awaiting Customer Clarification



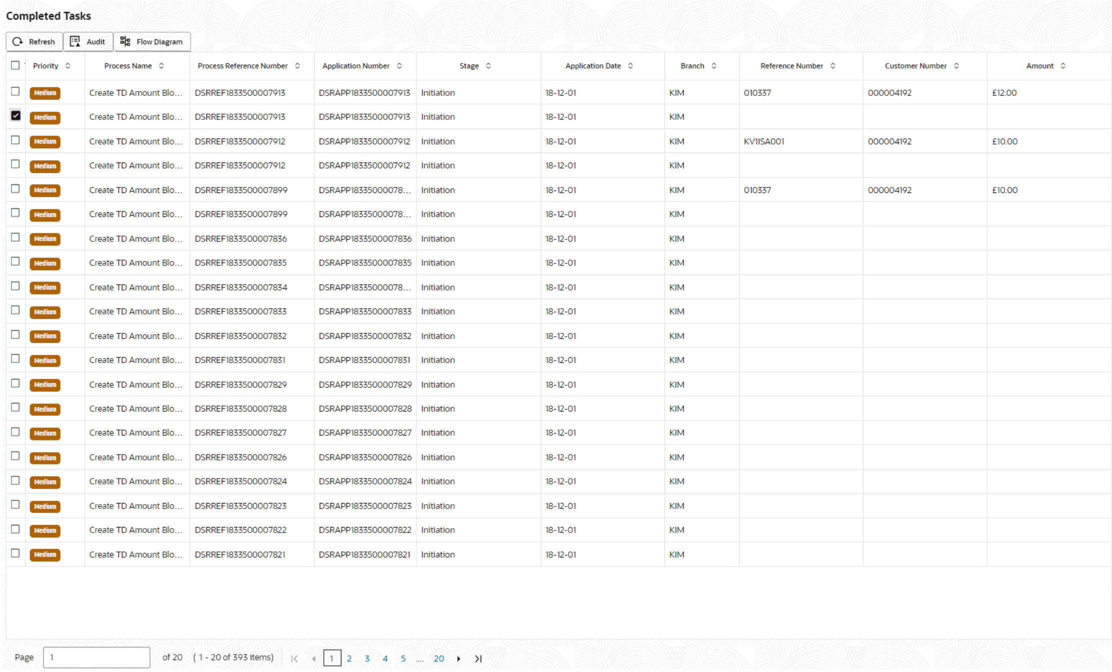
1.2 Completed Tasks

The completed tasks menu displays the tasks that the current user has recently completed at a stage in a process. This menu displays the most recent stages of completed tasks.

The following information is displayed on the task list:

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

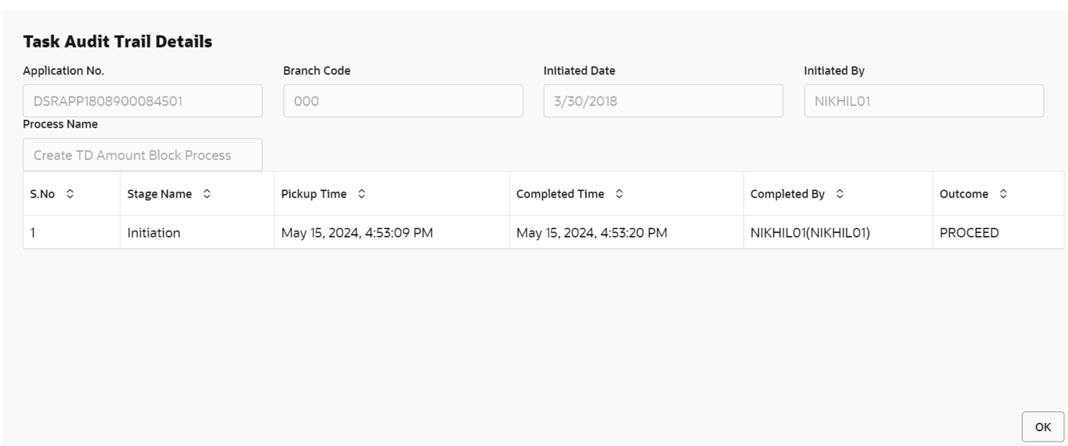
Figure 1-2 Completed Tasks



Below are the actions performed on the **Completed Tasks** menu:

1. **Flow Diagram** - The user can view the process flow and find the completed stages within the selected task in the Completed Tasks menu. The current stage is highlighted in the process flow.
2. **Refresh** - Click the **Refresh** button, to refresh the task list.
3. 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.

   Figure 1-3 Task Audit Trail Details

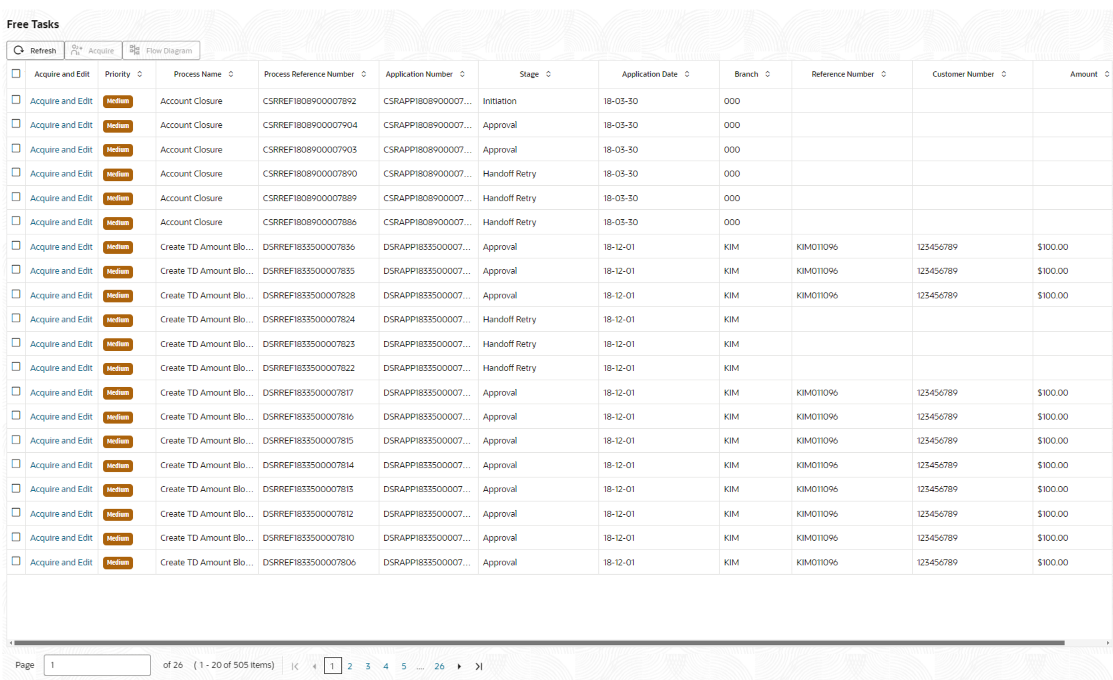
1.3 Free Tasks

The free tasks menu displays the tasks which are not acquired by any user and for the current user entitled to access.

The following information is displayed on the task list:

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

Figure 1-4 Free Tasks


Free Tasks

Refresh
Acquire
Flow Diagram

Acquire and Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Reference Number	Customer Number	Amount
Acquire and Edit	Medium	Account Closure	CSRREF1808900007892	CSRAPP1808900007...	Initiation	18-03-30	000			
Acquire and Edit	Medium	Account Closure	CSRREF1808900007904	CSRAPP1808900007...	Approval	18-03-30	000			
Acquire and Edit	Medium	Account Closure	CSRREF1808900007903	CSRAPP1808900007...	Approval	18-03-30	000			
Acquire and Edit	Medium	Account Closure	CSRREF1808900007890	CSRAPP1808900007...	Handoff Retry	18-03-30	000			
Acquire and Edit	Medium	Account Closure	CSRREF1808900007889	CSRAPP1808900007...	Handoff Retry	18-03-30	000			
Acquire and Edit	Medium	Account Closure	CSRREF1808900007886	CSRAPP1808900007...	Handoff Retry	18-03-30	000			
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007836	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007835	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007828	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007824	DSRAPP1833500007...	Handoff Retry	18-12-01	KIM			
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007823	DSRAPP1833500007...	Handoff Retry	18-12-01	KIM			
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007822	DSRAPP1833500007...	Handoff Retry	18-12-01	KIM			
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007817	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007816	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007815	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007814	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007813	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007812	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007810	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00
Acquire and Edit	Medium	Create TD Amount Blo...	DSRREF1833500007806	DSRAPP1833500007...	Approval	18-12-01	KIM	KIM011096	123456789	$100.00

Page 1 of 26 (1 - 20 of 505 items) 1 2 3 4 5 26

The following action can be performed on the Free Tasks menu:

1. **Acquire and Edit** - Click **Acquire and Edit** to acquire the task and edit directly from the free tasks menu.
2. **Acquire** - Select the task and click **Acquire** to edit the task later from **My Task** menu.
3. **Flow Diagram** - Free Tasks menu enables the user to view the process flow of the selected task, find the stages completed and the current stage highlighted in the process flow.

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

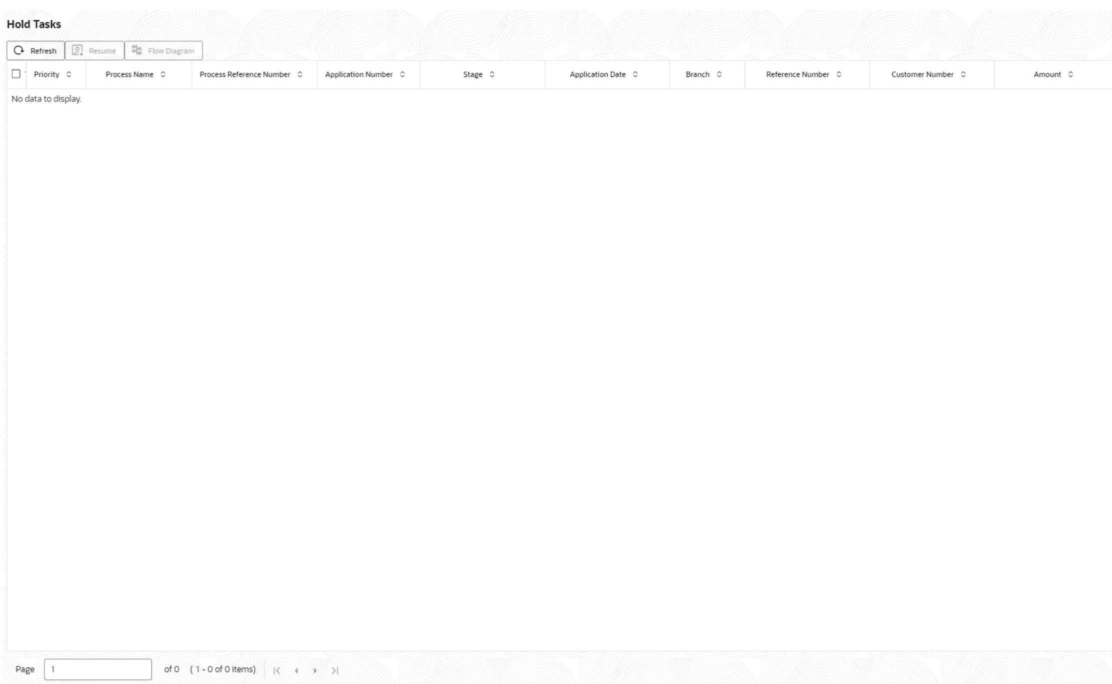
1.4 Hold Tasks

Hold Tasks menu displays the tasks that are moved on hold by the current user.

The following information is displayed on the task list:

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

Figure 1-5 Hold Tasks



The following are the actions performed on the Hold Tasks menu:

1. **Resume** - Select the task and click **Resume** button to move the task to **My Tasks** menu and then edit.
2. **Flow Diagram** - Hold Tasks menu enables the user to view the process flow of the selected task, find the stages completed and the current stage highlighted in the process flow.

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

1.5 My Pending Tasks

> **Note:**
>
> This screen is applicable only for **Branch Servicing**.

My Pending Tasks menu displays,

1. Tasks acquired from Free Tasks and which are pending for approval.
2. Tasks that are saved and closed in the initiation stage.
3. Tasks that are rejected in the authorization stage and are back to the initiation stage, assigned to the maker of the transaction.

The following information is displayed on the task list:

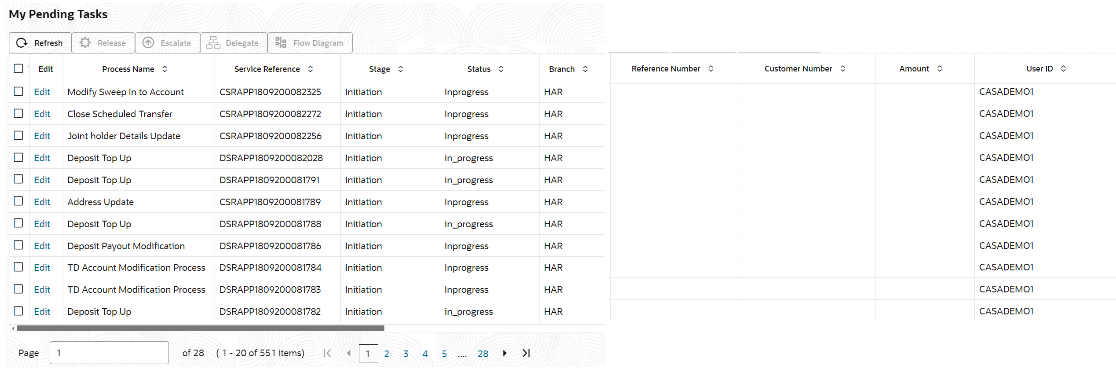
- **Edit**
- **Process Name**
- **Service Reference**
- **Stage** - Displays the current stage of the servicing transaction. The possible values are **Initiation**, **Approval**, or **Handoff Retry**.
- **Status** - Displays the current status of the servicing transaction relevant to the Stage.
    1. If the maker clicks on **Save and Close** in the transaction screen, the transaction will be in Initiation stage and the Status would be displayed as **Inprogress**.
    2. If the checker acquires a servicing transaction from the Free Tasks page, the transaction will be in Approval stage and the Status would be displayed as **Pending Approval**.
    3. If the checker rejects a servicing transaction, it will be returned to the maker. The transaction will be in Initiation stage and the Status would be displayed as **Rejected**.
    4. If the transaction fails in the authorization stage, it will be returned to the checker. The transaction will be in Handoff Retry stage and the Status would be displayed as **Failed**.

    Other statuses that are not displayed on the My Pending Tasks page are,

    1. **Reject By Bank** - This status is updated against a servicing transaction when the maker reopens a transaction that was saved and closed earlier and deletes it. The status of the deleted transaction is updated in the Completed Tasks under the **Audit** details tab.
    2. **Completed** - This status is updated against a servicing transaction when the transaction is approved and the details are successfully updated in the host system. The status of the completed transaction is updated in the Completed Tasks under the **Audit** details tab.
- **Branch**
- **Reference Number -** For servicing transactions, this column is updated with the Account or Deposit Number. In case if the transaction does not start with the account number (For example, Consolidated Adhoc Account Statement), this column will remain blank.

- **Customer Number** - For all servicing transactions, this column is updated with the Customer ID that is linked to the account number.
- **Amount**
- **User ID**

Figure 1-6 My Pending Tasks



Edit	Process Name	Service Reference	Stage	Status	Branch	Reference Number	Customer Number	Amount	User ID
Edit	Modify Sweep In to Account	CSRAPP1809200082325	Initiation	Inprogress	HAR				CASADEMO1
Edit	Close Scheduled Transfer	CSRAPP1809200082272	Initiation	Inprogress	HAR				CASADEMO1
Edit	Joint holder Details Update	CSRAPP1809200082256	Initiation	Inprogress	HAR				CASADEMO1
Edit	Deposit Top Up	DSRAPP1809200082028	Initiation	in_progress	HAR				CASADEMO1
Edit	Deposit Top Up	DSRAPP1809200081791	Initiation	in_progress	HAR				CASADEMO1
Edit	Address Update	CSRAPP1809200081789	Initiation	Inprogress	HAR				CASADEMO1
Edit	Deposit Top Up	DSRAPP1809200081788	Initiation	in_progress	HAR				CASADEMO1
Edit	Deposit Payout Modification	DSRAPP1809200081786	Initiation	Inprogress	HAR				CASADEMO1
Edit	TD Account Modification Process	DSRAPP1809200081784	Initiation	Inprogress	HAR				CASADEMO1
Edit	TD Account Modification Process	DSRAPP1809200081783	Initiation	Inprogress	HAR				CASADEMO1
Edit	Deposit Top Up	DSRAPP1809200081782	Initiation	in_progress	HAR				CASADEMO1

Page 1 of 28 (1 - 20 of 551 items) 1 2 3 4 5 28

The following action can be performed on the My Pending Tasks menu:

1. **Release** - Click **Release** to release the selected task from My Pending Tasks to Free Tasks menu.
2. **Edit** - Click **Edit** to edit the selected task.
3. **Refresh** - Click **Refresh** button to refresh the tasks list.
4. **Flow Diagram** - The user can view the process flow, find the completed stages, and see the current stage highlighted in the process flow of the selected task in the PendingTasks menu.
5. **Delegate** - Click **Delegate** to assign the acquired task to any valid user for processing within the group.
6. **Escalate** - Task will be assigned to Supervisor.

1.6 My Tasks

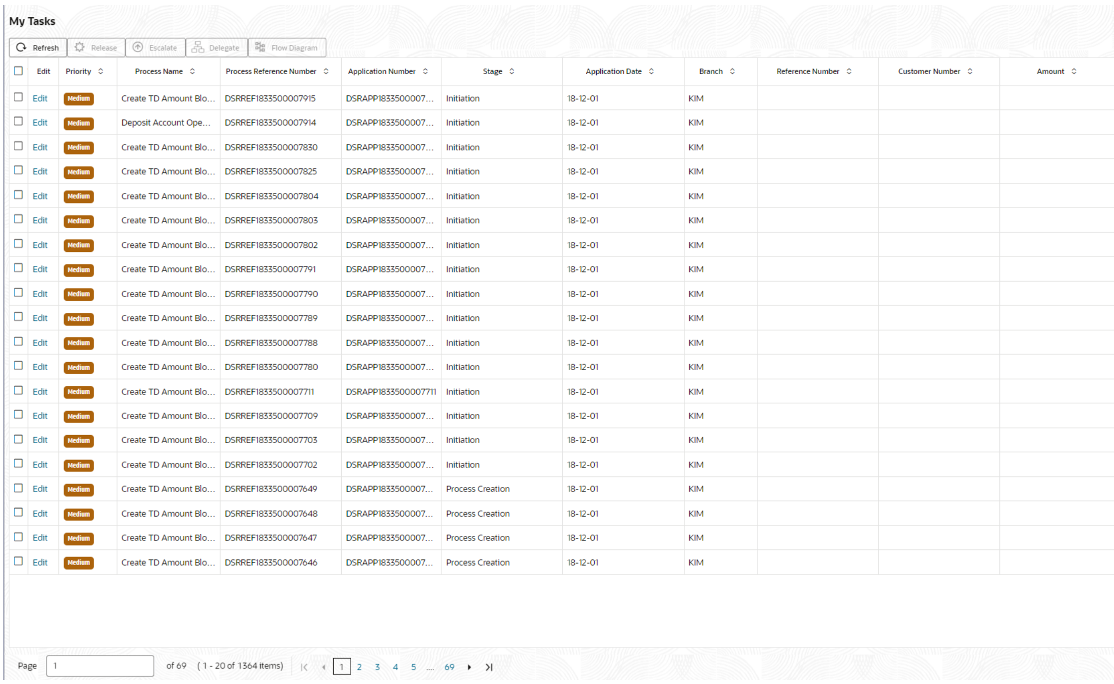
My Tasks menu displays the tasks acquired from the free tasks menu by the current user.

The following information is displayed on the task list:

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

- **Reference Number**
- **Customer Number**
- **Amount**

Figure 1-7   My Tasks



My Tasks

Refresh | Release | Escalate | Delegate | Flow Diagram

Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Reference Number	Customer Number	Amount
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007915	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Deposit Account Ope...	DSRREF1833500007914	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007830	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007825	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007804	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007803	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007802	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007791	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007790	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007789	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007788	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007780	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007711	DSRAPP1833500007711	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007709	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007703	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007702	DSRAPP1833500007...	Initiation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007649	DSRAPP1833500007...	Process Creation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007648	DSRAPP1833500007...	Process Creation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007647	DSRAPP1833500007...	Process Creation	18-12-01	KIM			
Edit	Medium	Create TD Amount Blo...	DSRREF1833500007646	DSRAPP1833500007...	Process Creation	18-12-01	KIM			

Page 1 of 69 (1 - 20 of 1364 items) 1 2 3 4 5 69

The following action can be performed on the My Tasks menu:

1. **Release** - Click **Release** to release the selected task from My Tasks to Free Tasks menu.
2. **Edit** - Click **Edit** to edit the selected task.
3. **Refresh** - Click **Refresh** button to refresh the task list.
4. **Flow Diagram** - My Tasks menu enables the user to view the process flow of the selected task, find the stages completed and the current stage highlighted in the process flow.
5. **Delegate** - Click **Delegate** to assign the acquired task to any valid user for processing within the group.
6. **Escalate** - Task will be assigned to Supervisor.

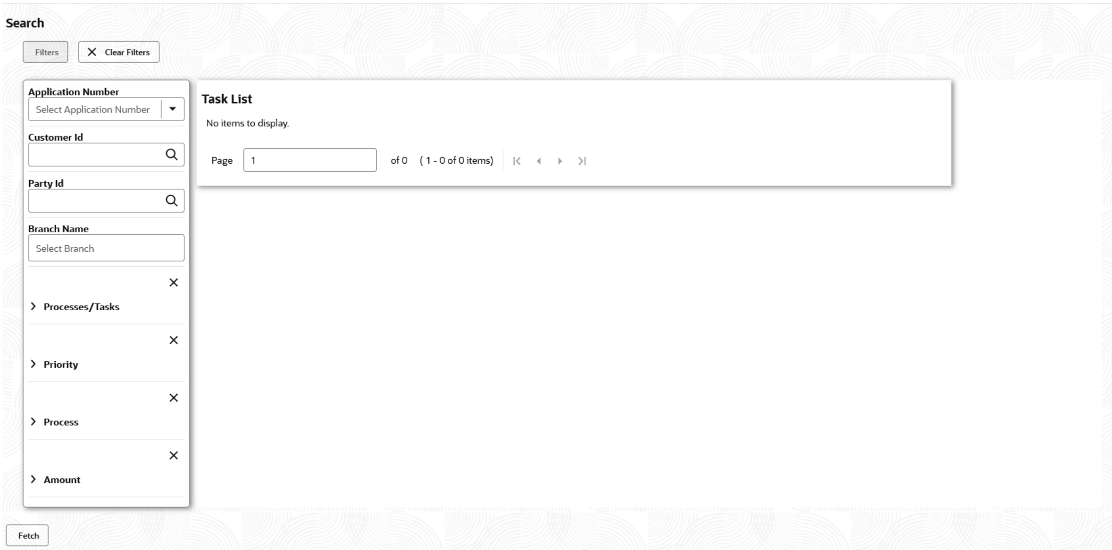
1.7 Search

Search menu enables the user to search for the task(s) with the following filters. Search will fetch the results either with one filter criteria or with multiple filter criteria.

- **Application Number**
- **Customer ID**
- **Party ID**
- **Branch Name**

- **Processes/Tasks**
- **Priority**
- **Process**
- **Amount**

Figure 1-8 Search



1.8 Servicing Transaction Inquiry

The user can search or filter servicing transactions that have been worked on and view the current status of the servicing transaction through Servicing Transaction Inquiry. This screen displays all the servicing transactions.

The user can search for a specific servicing transaction by using the filters for **Service Reference**, **Account Number**, or **Customer ID** from the drop-down.

Refresh - The user stays on the screen while the data is continuously refreshed. However, when the screen is closed and reopened, the data is automatically refreshed.

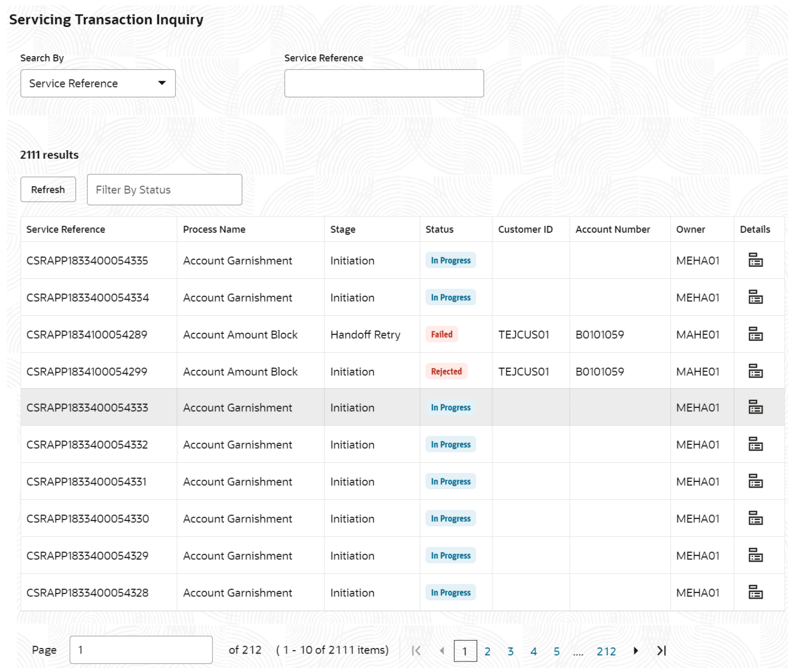
Filter By Status - **Pending Approval**, **Handoff in Progress**, **Failed**, **Rejected**, **In Progress**, and **Approved** are included in the drop-down list. With one filter criteria or multiple, you will fetch the results from the searches.

The following information is displayed on the screen:

- **Service Reference**
- **Process Name**
- **Stage**
- **Status**
- **Customer ID**
- **Account Number**

- **Owner**
- **Details**

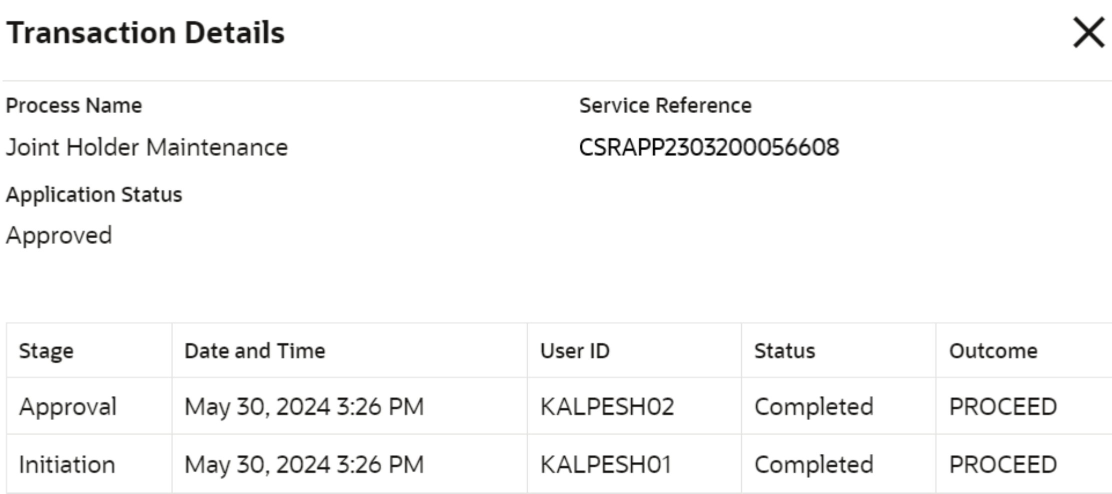
Figure 1-9 Servicing Transaction Inquiry



When the user clicks the **Details** button on a transaction, the audit details of that transaction are displayed on the screen.

- **Process Name**
- **Service Reference**
- **Application Status**
- **Stage**
- **Date and Time**
- **User ID**
- **Status**
- **Outcome**

Figure 1-10   Transaction Details



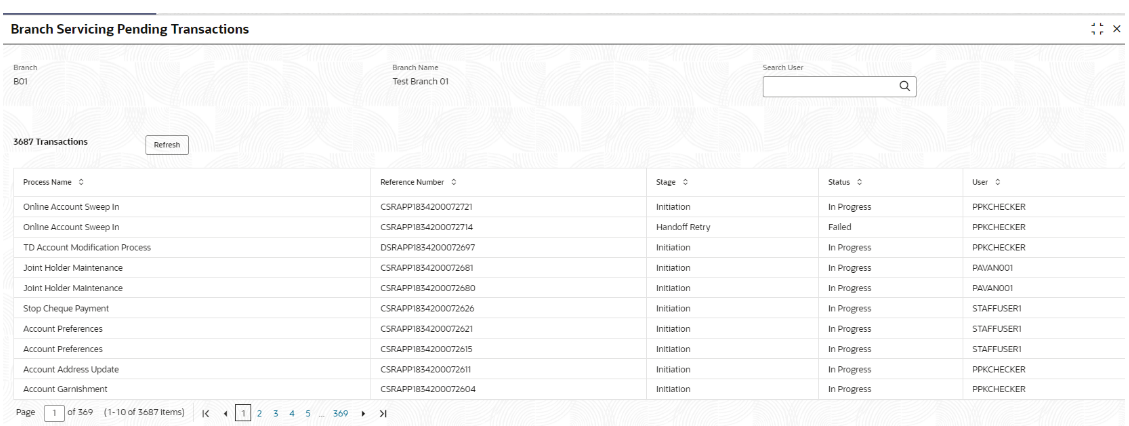
1.9 Branch Servicing Pending Transactions View

This screen provides details of pending branch servicing transactions that need to be completed before the end-of-day process begins. By default, the details are displayed for the logged-in branch and all users. Users can filter the pending transactions for specific users if needed.

When the screen is launched, pending service transactions for the logged-in branch are displayed with the following details:

- Number of pending transactions
- Process Name
- Reference Number
- Stage
- Status
- User ID

Figure 1-11   Branch Servicing pending Transactions



> **Note:**
>
> This screen displays the pending branch servicing transactions that are configured for pending transaction checks. By default, all branch servicing screens are configured for pending transaction checks, and it is allowed to modify them in the **CMN_TM_TRAN_CONFIG** table.

Table 1-1 Branch Servicing Pending Transactions

Field	Description
Branch	Display the user logged in branch and the pending transactions displayed for this branch.
Branch Name	Display the branch name.
Search User	Select the user id to filter the pending branch servicing transactions for a specific user. The LOV fetch all open and authorized user. The LOV screen, user can search the user by user name and **User ID**.
Refresh	Click on this button to refresh the details.
Process Name	Display the process name for the pending transactions.
Reference Number	Display the related Reference Number for the pending transactions.
Stage	Display the current stage of pending transaction.
Status	Display the current status of pending transaction.
User	Display the user ID with whom the transaction is pending. **Note:** If the transaction is not assigned to any user, the last actioned user ID should be displayed for the pending transactions.

Validate pending branch servicing transactions as part of the EOD process

During the end-of-day (EOD) process, the system verifies if any system about the end of day if any pending branch servicing transactions are still incomplete. The bank can configure which branch servicing transactions need to be completed on the same day. Transactions not configure for end-of-day validation can continue the next day, while processing the transactions in the next day system gives a informatuion message to the user that the transaction was initiated on the previous day.

1.10 Supervisor Tasks

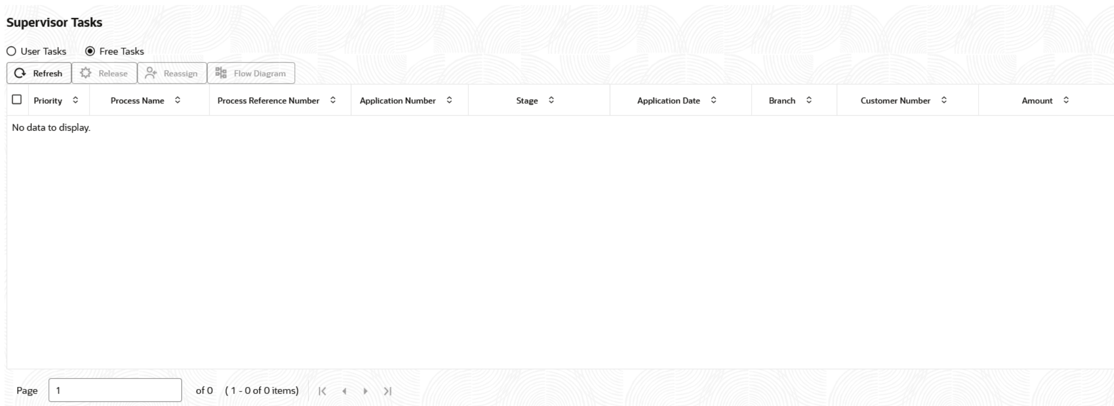
Supervisor Tasks menu displays the ‘User Tasks’ or ‘Free Tasks’ based upon the option that is selected.

The following information is displayed on the task list:

- **Priority**
- **Process Name**

- **Process Reference Number**
- **Application Number**
- **Stage**
- **Application Date**
- **Branch**
- **Customer Number**
- **Amount**

Figure 1-12 Supervisor Task



Following actions can be performed on the Supervisor Task menu:

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

1.11 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

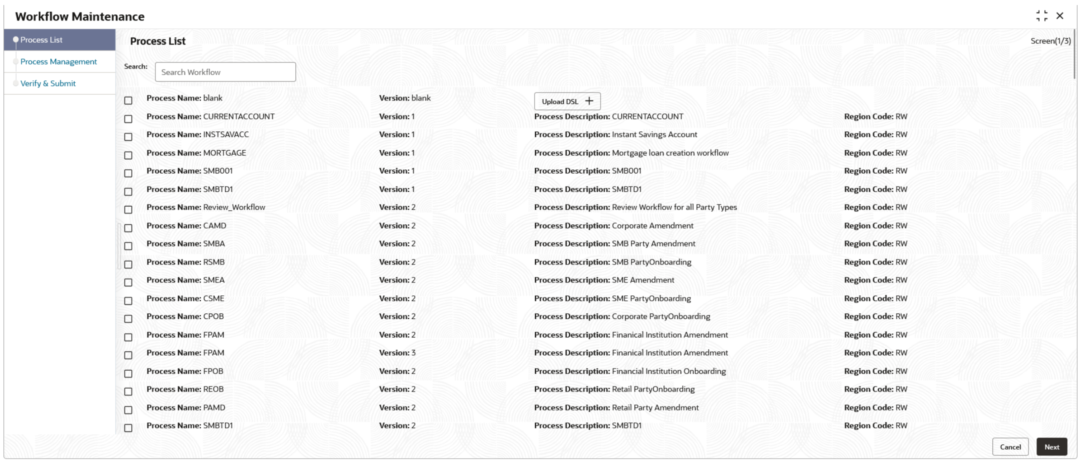
Specify **User ID** and **Password**, and login to **Home** screen.

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**.

   The **Process List** screen displays.

   Figure 1-13 Process List



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.

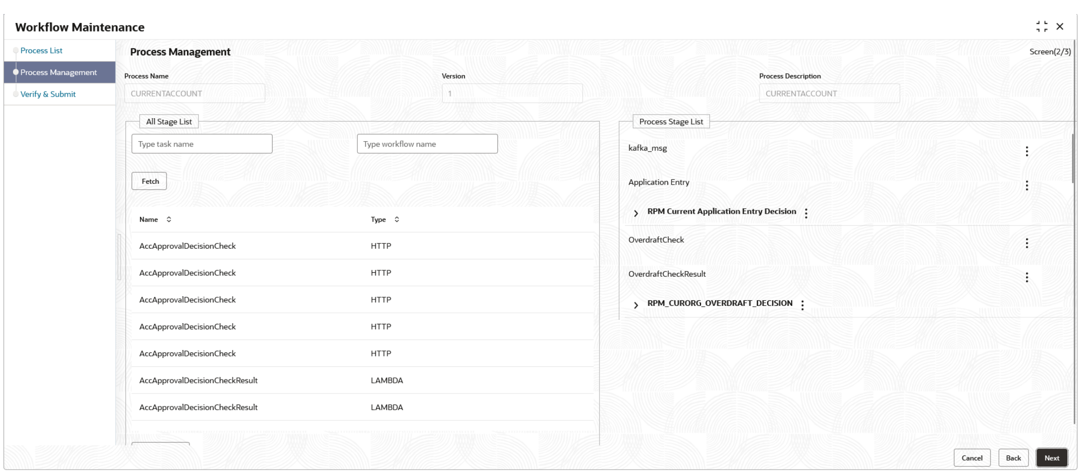
Process Management

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.

   Figure 1-14 Process Management

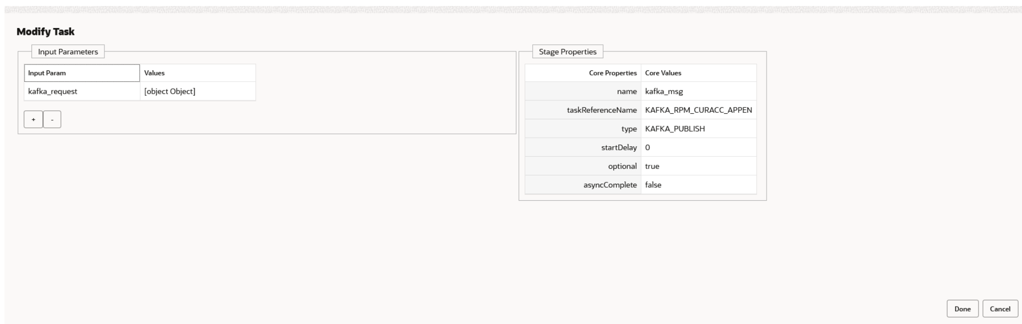


4. Drag and drop any stage from the **All Stage List** to the **Process Stage List** to add new stages in the process. The user can also perform the following actions in the **Process Management** screen:

   a. Click ⋮ and select **Edit** to edit a stage in the **Process Stage List**.

      The **Modify Task** screen displays.

      Figure 1-15 Modify Task

   b. Click ⋮ and select **Delete** to delete a stage from the **Process Stage List**.

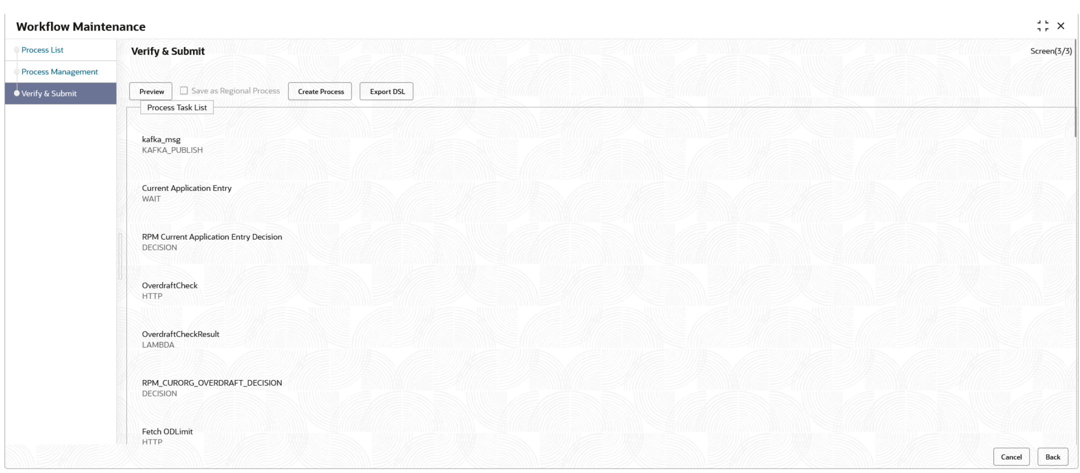
5. Perform one of the following action on the **Process Management** screen.
   - Click **Next** to navigate to the next screen after modifying the stages.
   - Click **Back** to navigate to the previous screen.
   - Click **Cancel** to exit the **Business Process Maintenance** screen.

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

6. Click **Next**.

   The **Verify & Submit** screen displays.

   Figure 1-16 Verify & Submit

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.

A

Errors Codes and Messages

Table A-1 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

B

Functional Activity Codes

This topic describes about the functional activity for Plato Services..

Table B-1 List of Functional Activity Codes

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	FreeTasks	Free Task Menu
Tasks	CMC_FA_SUBMENU_1_HoldTasks	HoldTasks	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

Index

A

Awaiting Customer Clarification, *1-1*

B

Business Process Maintenance, *1-13*

C

Completed Tasks, *1-2*

E

Errors Codes and Messages, *A-1*

F

Free Tasks, *1-3*
Functional Activity Codes, *B-1*

H

Hold Tasks, *1-5*

M

My Pending Tasks, *1-6*
My Tasks, *1-7*

S

Search, *1-8*
Servicing Pending Transactions, *1-11*
Servicing Transaction Inquiry, *1-9*
Supervisor Tasks, *1-12*

T

Tasks, *1-1*