Oracle® Banking Corporate Lending Process Management

Tasks Menu User Guide

Release 14.7.5.0.0

G14992-01

September 2024

Oracle Banking Corporate Lending Process Management Tasks Menu User Guide, Release 14.7.5.0.0

G14992-01

Contents

Index

Preface

This topic contains following sub-topics:

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

Purpose

This manual is designed to help acquaint you with the Tasks module of the Oracle Banking Corporate Lending Process Management (OBCLPM). It provides an overview of the module and guides you, through the various steps involved in viewing the Oracle Banking Corporate Lending Process Management services for the customers of your bank.

Audience

This document is intended for the following audience:

- Customer Service Representatives (CSRs)
- Staff in charge of setting up new products in a bank

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 customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

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:

- *OBCLPM Bilateral Loans User Guide*
- *OBCLPM Loan Syndication User Guide*
- *OBCLPM Configuration 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.

Acronyms and Abbreviations

The list of the acronyms and abbreviations that are used in this guide are as follows:

Table 1 Acronyms and Abbreviations

Acronyms	Abbreviations
DSL	Domain Specific Language
JSON	JavaScript Object Notation
OBCLPM	Oracle Banking Corporate Lending Process Management

Basic Actions

Table 2 List of Basic Actions

Action	Description
Approve	Click **Approve** to approve the initiated report. This button is displayed, once the user click **Authorize**.
Audit	Click **Audit** to view the maker details, checker details of the particular record, and record status. This button is displayed only for the records that are already created.
Authorize	Click **Authorize** to authorize the record created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a record. This button is displayed only for the already created records.
Close	Click **Close** to close a record. This action is available only when a record is created.
Confirm	Click **Confirm** to confirm the performed action.
Cancel	Click **Cancel** to cancel the performed action.
Compare	Click **Compare** 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**.
Collapse All	Click **Collapse All** to hide the details in the sections. This button is displayed, once the user click **Compare**.
Expand All	Click **Expand All** to expand and view all the details in the sections. This button is displayed, once the user click **Compare**.
New	Click **New** to add a new record. The system displays a new record to specify the required data. **Note:** The fields which are marked with Required are mandatory.
OK	Click **OK** to confirm the details in the screen.
Save	Click **Save** to save the details entered or selected in the screen.
View	Click **View** 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	Click **View Difference only** 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**.

Symbols and Icons

The following symbols and icons are used in the screens.

Table 3 Symbols and Icons - Common

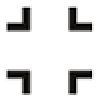
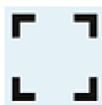
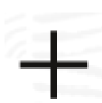
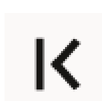
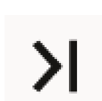
Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record

Table 3 (Cont.) Symbols and Icons - Common

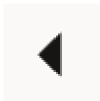
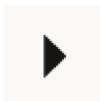
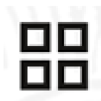
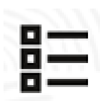
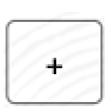
Symbol/Icon	Function
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Calender
	Filter
	Copy a record
	Click this icon to add a new row.

Table 3 (Cont.) Symbols and Icons - Common

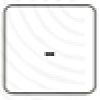
Symbol/Icon	Function
	Click this icon to delete an existing row.
	Click to view the created record.
	Click to unlock, delete, authorize or view the created record.

Table 4 Symbols and Icons - Audit Details

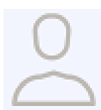
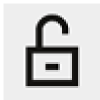
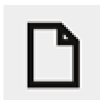
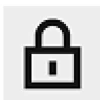
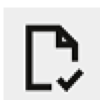
Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status

Table 5 Symbols and Icons - Widget

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

1
Tasks Menu

Task menu has multiple sub menus. Based on the user role, the sub menus can be accessed by the user.

This topic contains following sub-topic.

- Awaiting Customer Clarification
  Use **Awaiting Customer Clarification** menu to display the tasks which are in awaiting customer clarification state.
- Completed Tasks
  Use **Completed Tasks** menu to display the tasks which has been 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.
- Free Tasks
  Use **Free Tasks** menu to display the tasks which were not acquired by any user and for which the current user is entitled to access.
- Hold Tasks
  Use **Hold Tasks** menu to display the tasks which were moved on hold by the current user.
- My Tasks
  Use **My Tasks** menu to display the tasks acquired from the free tasks menu by the current user.
- Search
  Use **Search** menu to search for the task(s) with the filters. Search fetches the result either with one or multiple filter criteria.
- Supervisor Tasks
  Use **Supervisor Tasks** menu to view the **User Tasks** or **Free Tasks**. The tasks gets displayed based upon the option selected.

1.1 Awaiting Customer Clarification

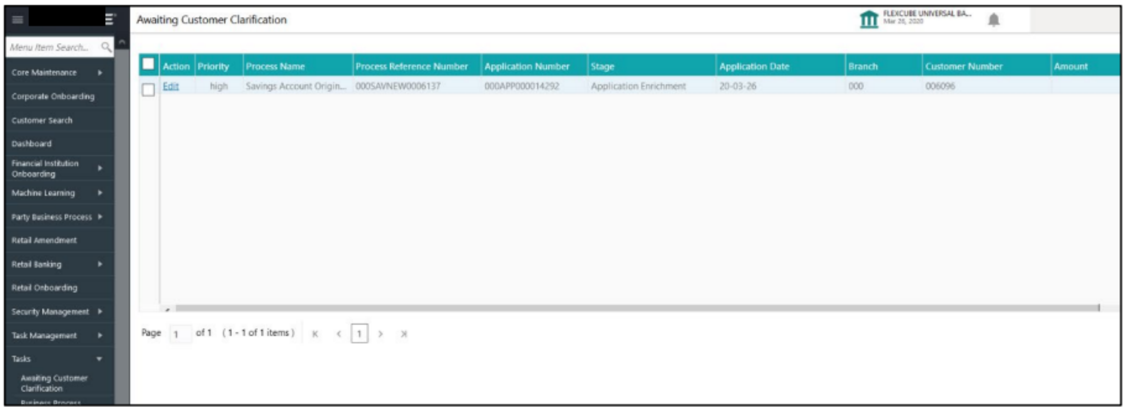
Use **Awaiting Customer Clarification** menu to display the tasks which are in awaiting customer clarification state.

The task list displays the following details of the task.

- Action
- 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

Use **Completed Tasks** menu to display the tasks which has been 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.

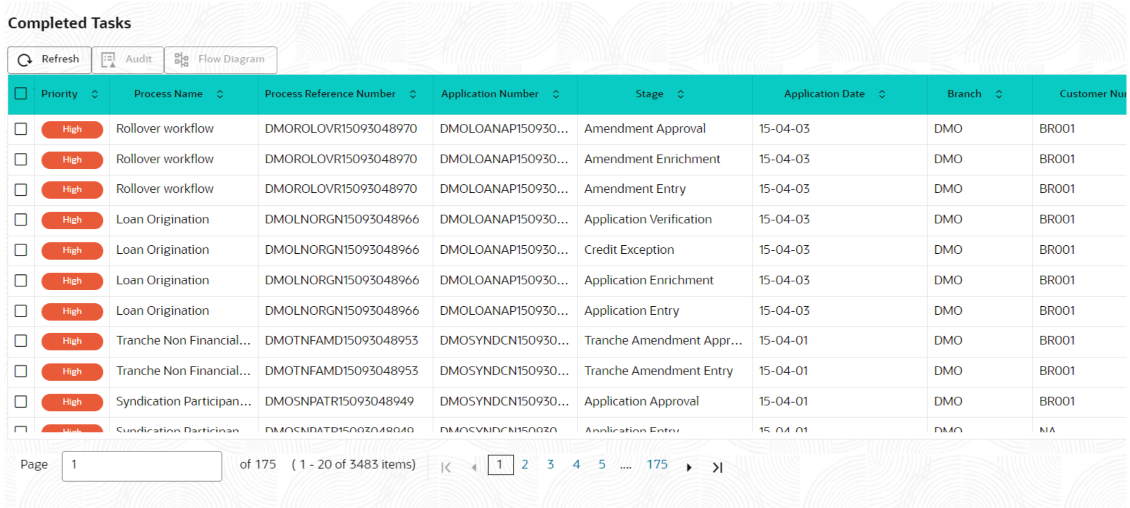
The task list displays the following details of the task.

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

Following actions can be performed on the Completed Tasks menu:

- **Flow Diagram** - **Completed Tasks** menu enables you to view the process flow of the selected task and you 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.

Figure 1-2   Completed Tasks



1.3 Free Tasks

Use **Free Tasks** menu to display the tasks which were not acquired by any user and for which the current user is entitled to access.

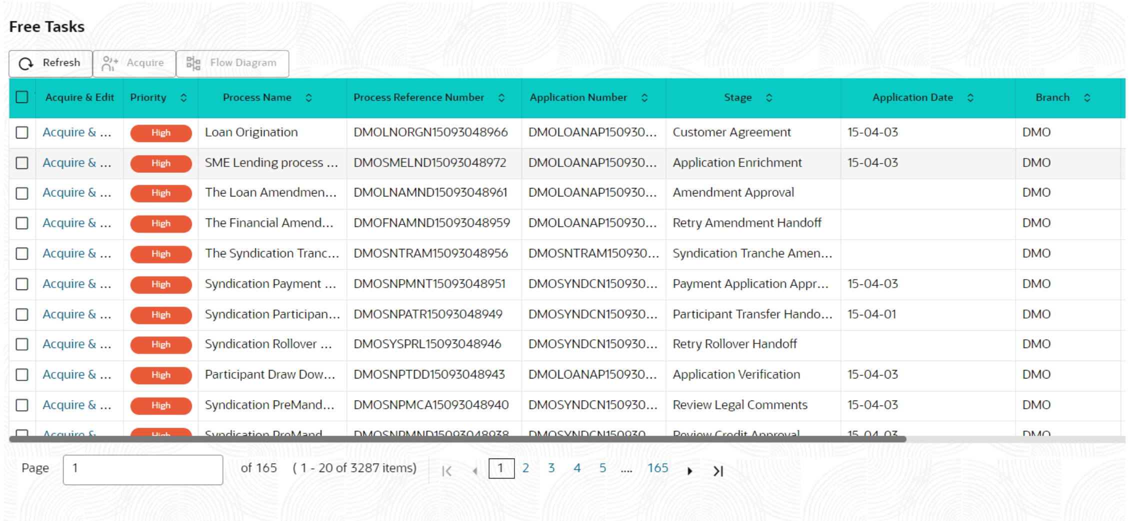
The task list displays the following details of the task.

- Action
- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- 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.

Figure 1-3 Free Tasks



1.4 Hold Tasks

Use **Hold Tasks** menu to display the tasks which were moved on hold by the current user.

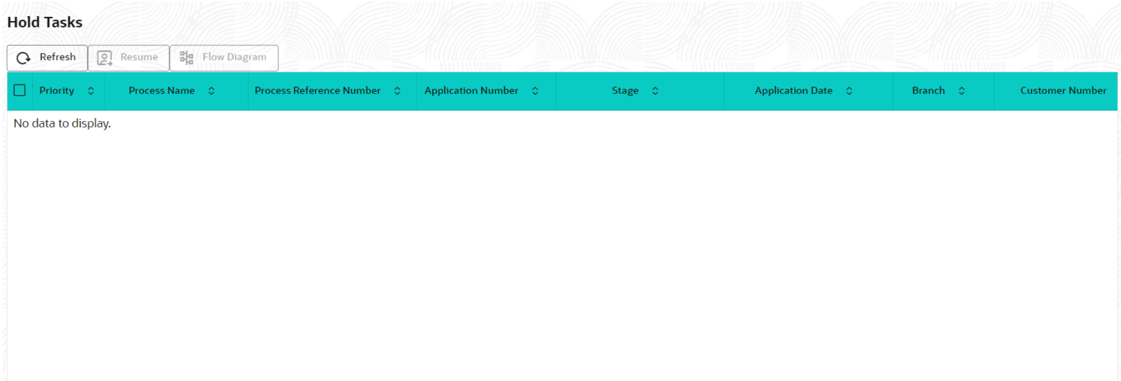
The task list displays the following details of the task.

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- 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.
- **Flow Diagram** - **Hold Tasks** menu enables you to view the process flow of the selected task and also you 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.

Figure 1-4 Hold Tasks



1.5 My Tasks

Use **My Tasks** menu to display the tasks acquired from the free tasks menu by the current user.

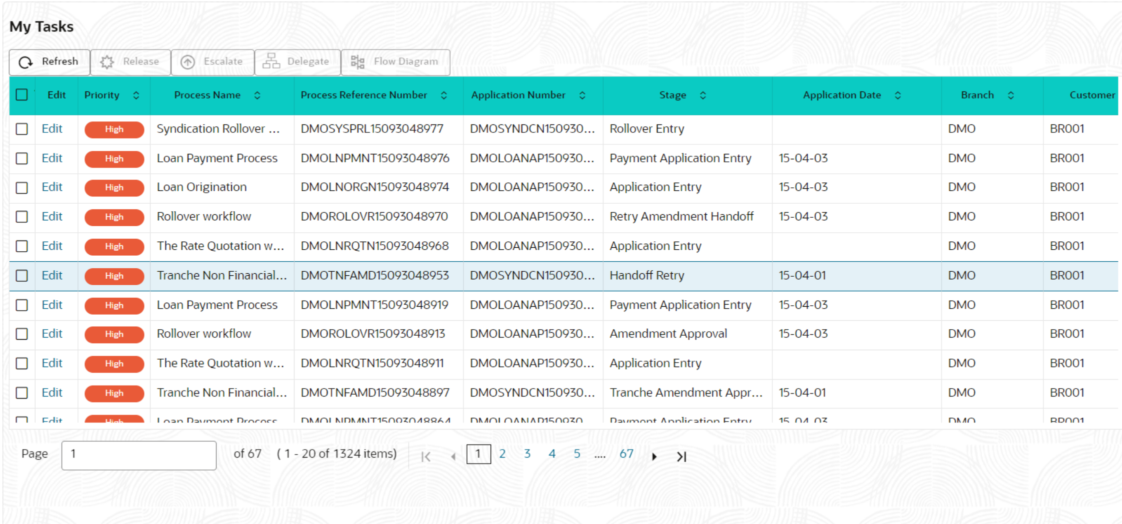
The task list displays the following details of the task.

- Priority
- Process Name
- Process Reference Number
- Application Number
- Stage
- Application Date
- Branch
- 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 you to view the process flow of the selected task and also you 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 withinthe group.
- **Escalate** - Task is assigned to Supervisor

Figure 1-5 My Tasks



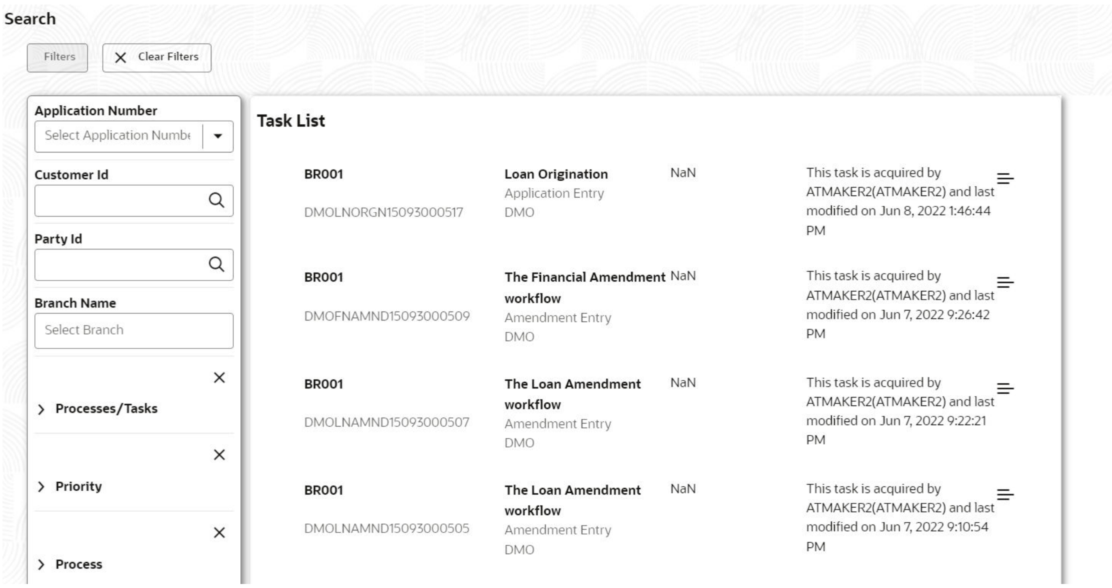
1.6 Search

Use **Search** menu to search for the task(s) with the filters. Search fetches the result either with one or multiple filter criteria.

The task list displays the following details of the task.

- Application Number
- Customer Number
- Branch Name
- Taks
- Priority
- Process and Stage
- Entity Type
- Amount

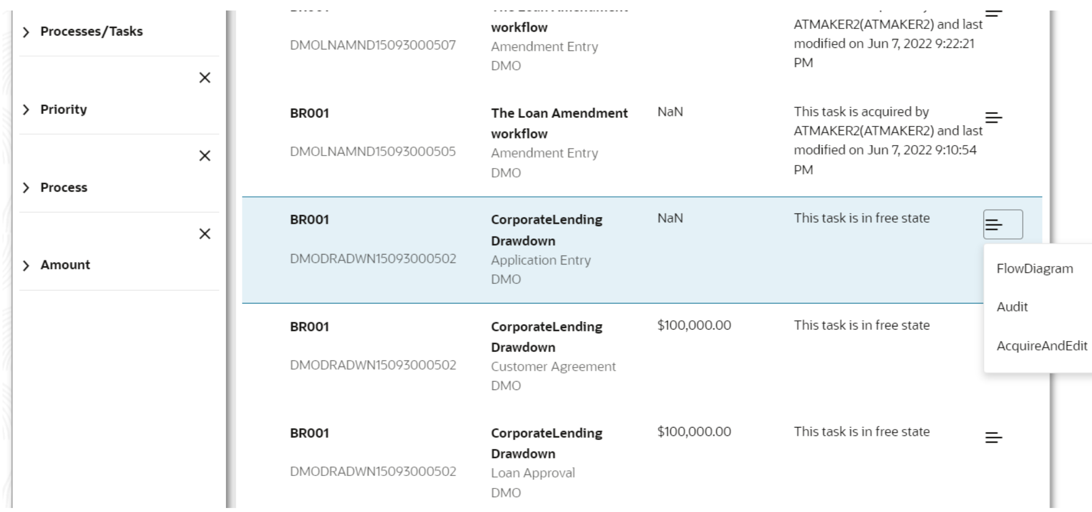
Figure 1-6 Search



Following action can be performed on the tasks listed in the task list.

- **Acquire** - Click **Acquire** to acquire task.
- **Flow Diagram** - Enables you to view the process flow of the selected task and also you can find the stages completed by the selected task and the current stage highlighted in the process flow.

Figure 1-7 Search Task



1.7 Supervisor Tasks

Use **Supervisor Tasks** menu to view the **User Tasks** or **Free Tasks**. The tasks gets displayed based upon the option selected.

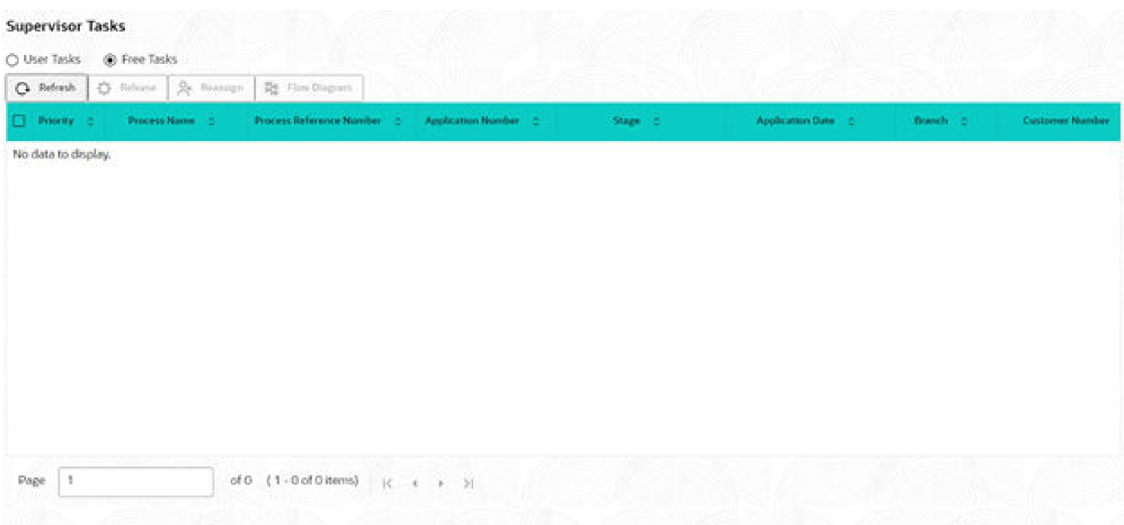
The task list displays the following details of the task.

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

Following actions can be performed on the **Supervisor Tasks** menu

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

Figure 1-8 Supervisor Tasks



2

Business Process Maintenance

Use **Business Process Maintenance** menu to allow the user to create workflows.

Basically, it comprises of three screens.

- Process List Screen
  Use **Process List** screen to view the list of processes. You can select any one of the existing process or a blank process. Blank process can be selected if you want to create a new workflow from scratch.
- Process Management Screen
  Use **Process Management** screen to view 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** . In addition, all stages are listed in table on the left under the heading **All Stage List**.
- Verify and Submit Screen
  Use **Verify & Submit** screen to view the process task list with all the new/modified tasks.

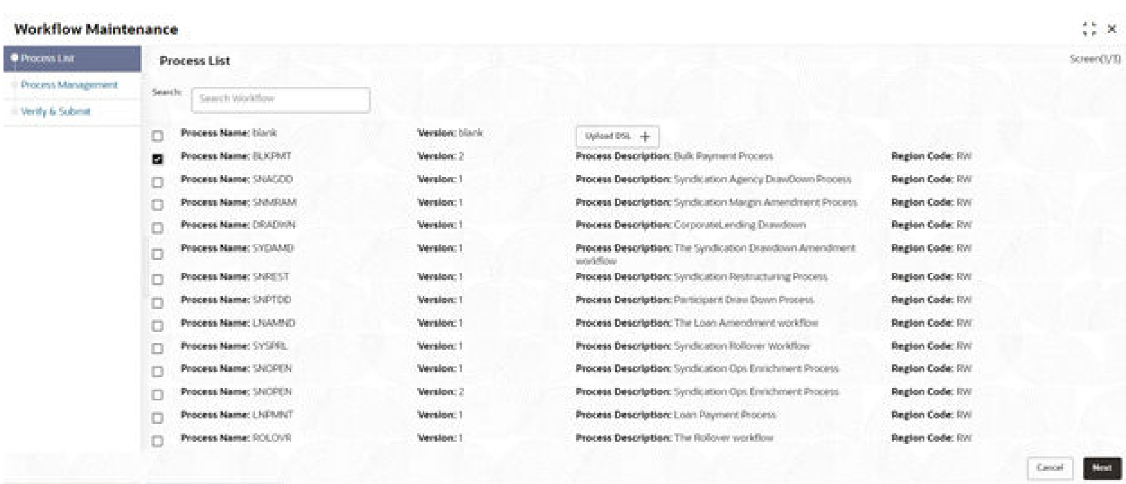
2.1 Process List Screen

Use **Process List** screen to view the list of processes. You can select any one of the existing process or a blank process. Blank process can be selected if you want to create a new workflow from scratch.

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** to navigate to the **Process Management** screen
- **Cancel** – To exit from the **Business Process Maintenance** menu.

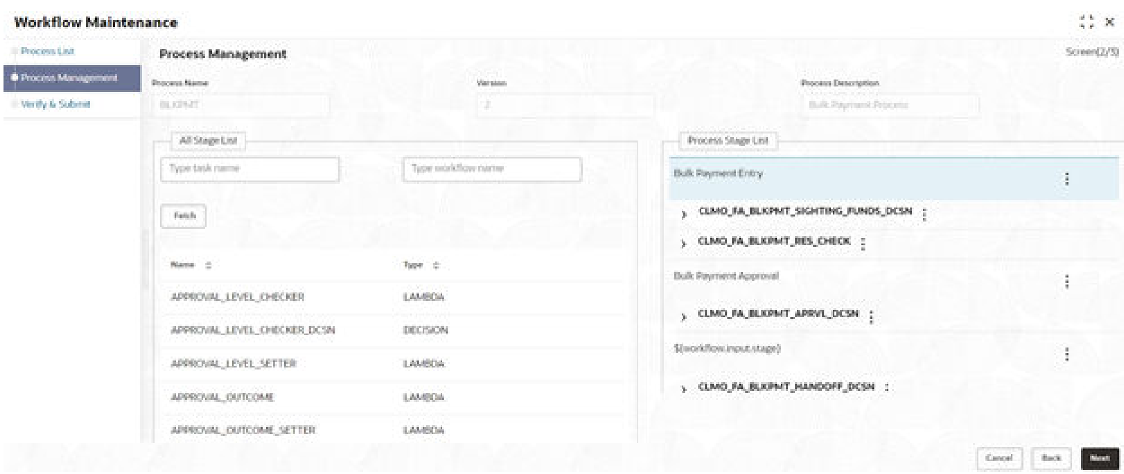
Figure 2-1 Process List



2.2 Process Management Screen

Use **Process Management** screen to view 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** . In addition, all stages are listed in table on the left under the heading **All Stage List**.

Figure 2-2 Process Management Screen



Drag and Drop Functionality:

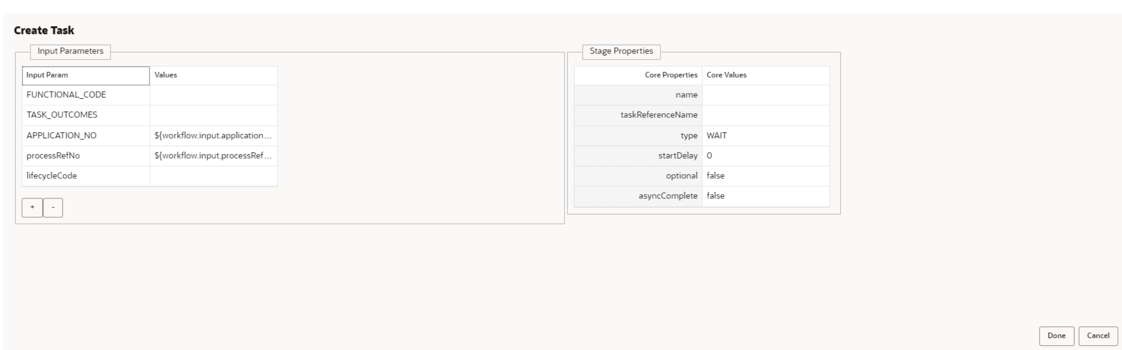
To add new stages in the process, drag and drop any stage from **All Stage List** to **Process Stage List**.

Creating a New Stage

- Click **Create Stage** 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 2-3 Create Tasks



Edit/Delete Functionality

1. Click **Edit** to edit the stage in **Process Stage List**. The **Modify Task** screen is displayed.
2. Click **Delete** to delete the stage from **Process Stage List**.

Figure 2-4 Edit-Delete functionality

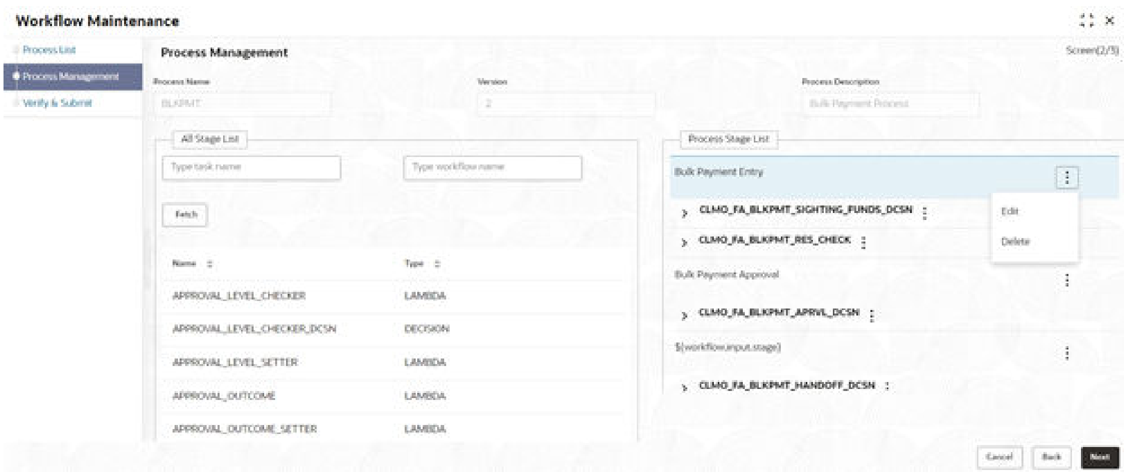
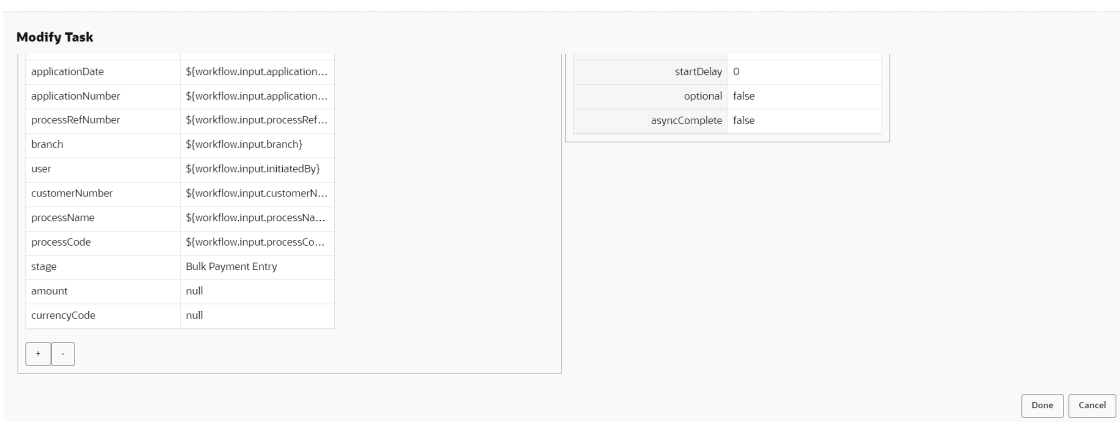


Figure 2-5 Modify Tasks



Following actions can be performed on the Process Management screen:

- **Back** – Click **Back** to navigate to the previous screen.
- **Next** – After modifying the stages, click **Next** to navigate to the next screen **Verify & Submit**
- **Cancel** – To exit from the **Business Process Maintenance** menu.

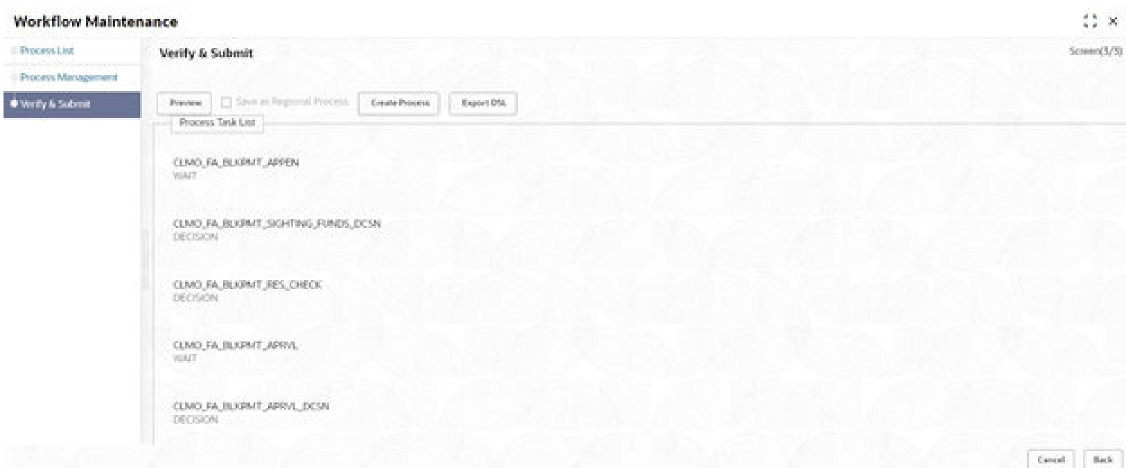
2.3 Verify and Submit Screen

Use **Verify & Submit** screen to view the process task list with all the new/modified tasks.

Following actions can be performed on the Process Management screen:

- **Preview** - Click **Preview** to view the flow diagram of the selected process.
- **Create Process** - 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** - To **Export DSL** into a file in JSON format.
- **Back** – Click **Back** to navigate to the previous screen.
- **Cancel** – To exit from the **Business Process Maintenance** menu.

Figure 2-6 Verify and Submit



3 Error Codes and Messages

Use this topic to view the error codes and messages

Table 3-1 Error code 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

Index

A

B

C

E

F

H

M

P

S

T

V