Oracle® Banking Microservices Architecture
Tasks User Guide

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Preface

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.

Before You Begin

Kindly refer to the **Getting Started User Guide** for information on common functionalities like login, navigation, and general settings before proceeding with this guide.

Module Pre-requisite

Specify **User Id** and **Password**, and login to the **Home** screen.

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 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.

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.

Symbols and Icons

The following symbols and icons are used in the screens.

Table   Symbols and Icons - Common

Symbol/Icon	Function
	Minimize

Table   (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Maximize
	Close
	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

Table   (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Grid view
	List view
	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
	Unauthorized or Closed status
	Authorized or Open status

Module Post-requisite

After finishing all the requirements, log out from the **Home** screen.

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:

- Configure Task
  This topic describes the systematic instruction to configure the triggering of a particular task.

- Create Task
  This topic describes the systematic instruction to create a task for a specific purpose.

- Trigger Tasks
  This topic describes the systematic instruction to trigger tasks manually when required.

- View FrameWork Jobs
  This topic describes the systematic instruction to view the Framework jobs.

- View Job Trigger
  This topic describes the systematic instruction to view a list of configured tasks.

- View Task
  This topic describes the systematic instruction to view a list of existing tasks.

- View Tasks Status
  This topic describes the systematic instruction to view a list of existing tasks.

- 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 Configure Task

This topic describes the systematic instruction to configure the triggering of a particular task.

The task can be scheduled for execution on a designated day of the month or week, at a specific time. Configure the task to be triggered when a particular event occurs.

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **Configure Task**.

The **Configure Task** screen is displayed.

Figure 1-1   Configure Task

For more information on fields, refer to the field description table.

Table 1-1   Configure Task – Field Description

Field	Description
Event / Schedule	Select the **Event** option if tasks should be triggered when a specific event occurs. Select the **Schedule** option if tasks should be triggered on a specific day and time using a CRON expression.
Task Name	Select the task for which a trigger should be configured.
Task Trigger Name	Specify a unique name for the task trigger.

Table 1-1   (Cont.) Configure Task – Field Description

Field	Description
CRON Expression / Topic Name	Enter the CRON Expression pattern to schedule the triggering of the task for a specific day and time. The pattern is a list of six single space-separated fields, representing second, minute, hour, day, month, and weekday. For the month and weekday, provide the first three letters of their English names. This field is enabled if you select the **Schedule** option. OR Enter the Topic Name or the destination for which the task should be triggered on the arrival of a new message. This field is enabled if you select the **Event** option. **Note**: Examples of CRON expression patterns: • "0 0 * * * *" = the top of every hour of every day. • "*/10 * * * * *" = every ten seconds. • "0 0 8-10 * * *" = 8, 9 and 10 o'clock of every day. • "0 0 6,19 * * *" = 6:00 AM and 7:00 PM every day. • "0 0/30 8-10 * * *" = 8:00, 8:30, 9:00, 9:30, 10:00 and 10:30 every day. • "0 0 9-17 * * MON-FRI" = on the hour nine-to-five weekdays • "0 0 0 25 12 ?" = every Christmas Day at midnight

2. Perform one of the following action:

   • Click **Save** to save the configuration and send for authorization (if applicable).

   • Click **Cancel** to discard the changes and close the screen.

1.2 Create Task

This topic describes the systematic instruction to create a task for a specific purpose.

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **Create Task**.

   The **Create Task** screen is displayed.

Figure 1-2   Create Task

2. Specify the fields on **Create Task** screen.

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-2   Create Task – Field Description

Field	Description
Task Name	Specify a unique name for the task being created.
Task Description	Specify the description for the task being created. The syntax is: **appId:::<<appId>>;microServiceName:::<<microServiceName>>;contextRoot:::<<contextRoot>>;type:::<< type Of Schedule >>;jobName:::<< JOB to be triggered >>;destination:::<<Topic for which the trigger is defined>>;cronExpression:::<<cronExpression>>** (without spaces) The values that must be provided for the appId, the microServiceName, the contextRoot, and the jobName are detailed in the Task Description Formats table. Some of these tasks come as part of the day 0 set up. For example : Task Name: processFutureDatedDisbursementPO Task Definition: appId:::OBSCFCMBATCH;microServiceName:::obscfcm-batch-jobs;contextRoot:::obscfcm-batch-jobs;jobName:::futureDatedDisbursementPOJob;

3. Perform one of the following action:

   - Click **Save** to save the details.
     The external chart of account is successfully created and can be viewed using the **View Task** screen.

   - Click **Cancel** to discard the changes and close the screen.

1.3 Trigger Tasks
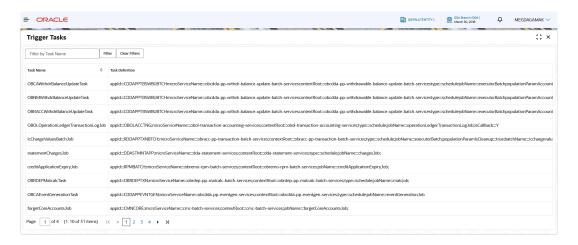
This topic describes the systematic instruction to trigger tasks manually when required.

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **Trigger Task**.

   The **Trigger Task** screen is displayed.

Figure 1-3   Trigger Task

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-3   Trigger Task – Field Description

Field	Description
Task Name	Displays the name of the task.
Task Definition	Displays the description of the task.
Actions	Select the option to trigger the task record.

2. Click **Trigger** button in the Actions column to trigger a particular task manually.

A message appears stating that the task is triggered successfully.

3. Specify the criteria in the **Filter by Task Name** to fetch the required tasks. icon, click **Filter**.

The search result is displayed based on the criteria.

1.4 View FrameWork Jobs

This topic describes the systematic instruction to view the Framework jobs.

The batch framework is a part of plato-batch-framework library. It is designed to provide common batch framework in order to adopt by product teams for executing batch services. It configures the batch configurations such as Commit Frequency, Stream Size, Skip Policy etc. It has following are the features:
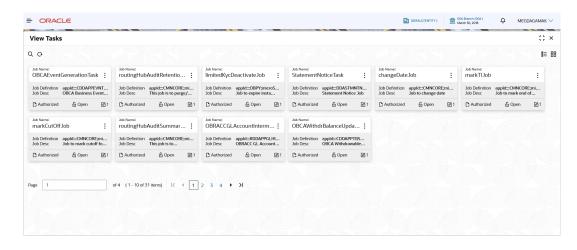
• Option to execute batch in either of configuration

1. Remote Chunking by using kafka implementation for scalability.

2. Partition chunking that is. Spawning of threads without eventing for smaller Bank volumes

- Skipping policy for each job in case error occurs (Multiple execution of the same batch job on the same day for example Intra Day)

- Choice to execute batch job using

   1. Chunklet step execution

   2. Tasklet step execution

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **View FrameWork Jobs**.

   The **View FrameWork Jobs** screen is displayed.

Figure 1-4   View FrameWork Jobs

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-4   View FrameWork Jobs – Field Description

Field	Description
Job Name	Displays the name of job for which task is created.
Job Definition	Displays the definition of the job task.
Job Description	Displays the description of the Job task.
Authorization Status	Displays the authorization status . The options are: • **Authorized** • **Rejected** • **Unauthorized**
Record Status	Displays the record status. The options are: • **Open** • **Closed**
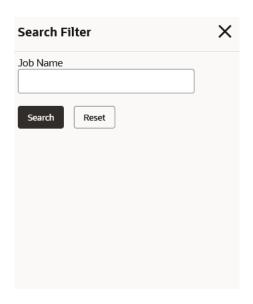
2. On the **View FrameWork Jobs** screen, click ![search icon] icon.

   The **Search Filter** screen is displayed.

   Figure 1-5   View FrameWork Jobs - Search

   a. On the **View FrameWork Jobs - Search** screen, specify the **Search Filter** to fetch the required tasks.

      > ⓘ **Note**
      >
      >   The fields marked as **Required** are mandatory.

      For more information on fields, refer to the field description table.

      Table 1-5   View FrameWork Jobs - Search - Field Description

Field	Description
Job Name	Specify the name of job for which task is created.

   b. Click **Search** to display the required jobs.

      Based on the search criteria the jobs is displayed.

      > ⓘ **Note**
      >
      >   You can perform **Unlock**, **Close**, **Authorize** or **View** the jobs.
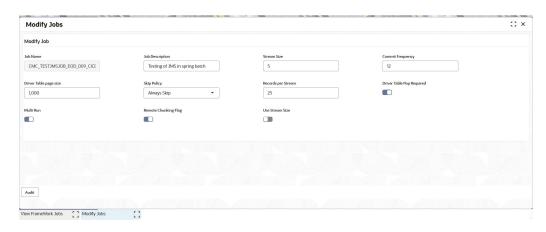
   ⋮

3. Perform one of the following action from the

- Click **Unlock** to modify the created job.

  The **Modify Job** screen is displayed.

- When you click **Close**, the record's status is updated to **Closed**. The record is not deleted and remains in the database.

- Click **View** to view the modified job details.
  The **Modify Job** screen is displayed.

Figure 1-6   Modify Job

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-6   Modify Job - Field Description

Field	Description
Job Name	Displays the name of job for which task is created.
Job Description	Displays the description of the Job task.
Stream Size	Specify the t number of threads to spawn.
Commit Frequency	Specify the Batch commit size.
Driver Table page size	Specify batch reader page size to read from driver table.
Skip Policy	Select the exception handling flag from the drop-down list. The available options are: – **Never Skip** :It abort stream on first occurrence of record processing exception. – **Always Skip** : Always skips, no matter the exception or the total number of skipped items. – **Limit Skip**: Skips failed record till limit maintained in column SKIP_COUNT.
Records Per Stream	Specify the number of records per thread/stream.
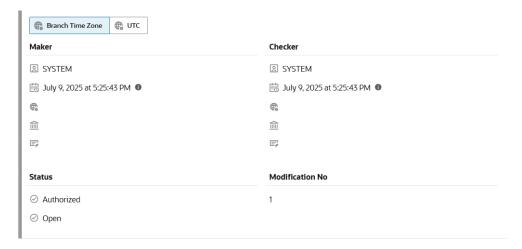
Table 1-6   (Cont.) Modify Job - Field Description

Field	Description
Driver Table Pop Required	Click the toggle status to enable populating driver table. Invoke domain service even if driver table is already populated. If disabled, skips the invocation of domain service for driver table population if table is already populated.
Multi Run	Click the toggle status to enable multiple execution of the same batch job on the same day (example Intra Day). To enable multi run, SKIP_POLICY has to be set Always skip.
Remote Chunking Flag	Click the toggle status to enable batch execution based on either Event-based configuration (across JVM) or Partition-based configuration (within JVM). By default, this option is disabled (Partition based execution).
Use Stream Size	Click the toggle status to enable

– Click **Audit** to view the **AUDIT** of this screen.

Figure 1-7   View FrameWork Jobs - Audit

1.5 View Job Trigger

This topic describes the systematic instruction to view a list of configured tasks.

The users are also provided with the option to view the details of the particular task, if required. The list and card view options are provided on the screen to view the tasks, where in the list view, tasks are listed in tabular form while in card view, user can view in the form of a cards.

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **View Job Trigger**.

   The **View Job Trigger** screen is displayed.

Figure 1-8   View Job Trigger

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-7   View Job Trigger – Field Description

Field	Description
Definition Name	Displays the definition name of the job task.
Definition	Displays the description of the definition.
Definition	Displays the definition of the job task.
Authorization Status	Displays the authorization status . The options are: • **Authorized** • **Rejected** • **Unauthorized**
Record Status	Displays the record status. The options are: • **Open** • **Closed**
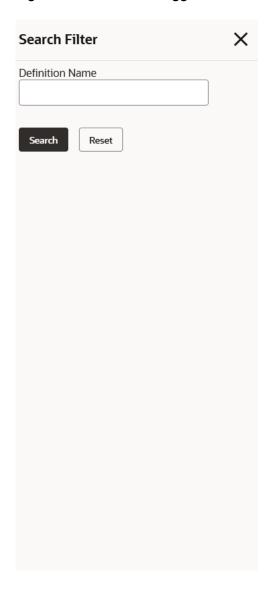
2. On the **View Job Trigger** screen, click ⌕ icon.

   The **Search Filter** screen is displayed.

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Figure 1-9   View Job Trigger - Search

a. On the **View Job Trigger - Search** screen, specify the **Search Filter** to fetch the required jobs of the task.

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-8   View Job Trigger - Search - Field Description

Field	Description
Definition Name	Specify the definition name of the job task.

b. Click **Search** to display the required tasks.

Based on the search criteria the tasks is displayed.

> ⓘ **Note**
>
> You can perform **Unlock**, **Close**, **Authorize** or **View** the created tasks.

⋮

3. Perform one of the following action from the ⋮

   - Click **Unlock** to modify the created job.

     The **Modify Job** screen is displayed.

   - When you click **Close**, the record's status is updated to **Closed**. The record is not deleted and remains in the database.

   - Click **View** to view the configured tasks.

Figure 1-10   Create Job Trigger

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.
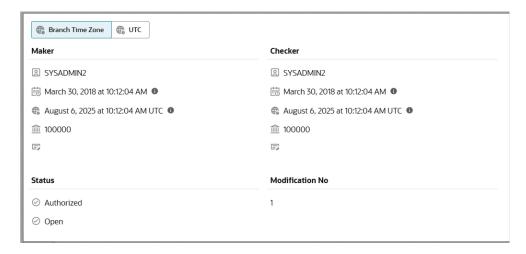
Table 1-9   Task Maintenance - View - Field Description

Field	Description
Task Trigger Name	Specify a unique name for the trigger task being created.
Definition	Specify the definition for the triggered task.

– Click **Audit** to view the **AUDIT** of this screen.

Figure 1-11   Create Trigger Tasks - View Audit
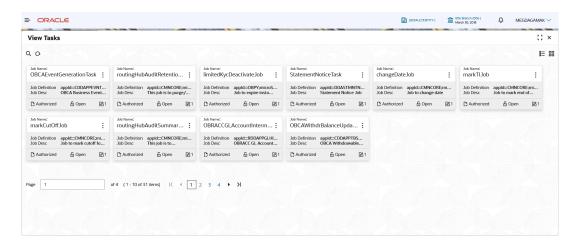
1.6 View Task

This topic describes the systematic instruction to view a list of existing tasks.
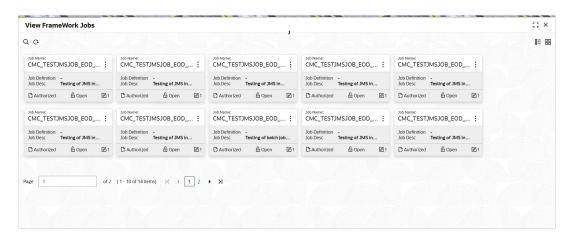
The users are also provided with the option to delete a particular task, if required. The list and card view options are provided on the screen to view the tasks, where in the list view, tasks are listed in tabular form while in card view, user can view in the form of a cards.

1.   From **Home** screen, click **Task Management**. Under **Task Management**, click **View Task**.

The **View Task** screen is displayed.

Figure 1-12   View Task

ⓘ **Note**

The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.
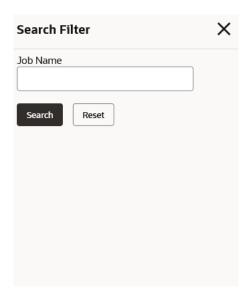
Table 1-10   View Task – Field Description

Field	Description
Job Name	Displays the name of job for which task is created.
Job Definition	Displays the definition of the job task.
Job Description	Displays the description of the Job task.
Authorization Status	Displays the authorization status . The options are: • **Authorized** • **Rejected** • **Unauthorized**
Record Status	Displays the record status. The options are: • **Open** • **Closed**

2. On the **View Tasks** screen, click   icon.

    The **Search Filter** screen is displayed.

Figure 1-13   View Tasks - Search

a. On the **View Tasks - Search** screen, specify the **Search Filter** to fetch the required tasks.

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-11   View Tasks - Search - Field Description

Field	Description
Job Name	Specify the name of job for which task is created.

b.   Click **Search** to display the required tasks.

Based on the search criteria the tasks is displayed.

> ⓘ **Note**
>
> You can perform **Unlock**, **Close**, **Authorize** or **View** the created tasks.

3.   Perform one of the following action from the

- Click **Unlock** to modify the created tasks.

  The **Tasks Maintenance - Modify** screen is displayed.

- When you click **Close**, the record's status is updated to **Closed**. The record is not deleted and remains in the database.

- Click **View** to view the created tasks. The **Create Task** screen is displayed.

Figure 1-14   Create Tasks - View

> ⓘ **Note**
>
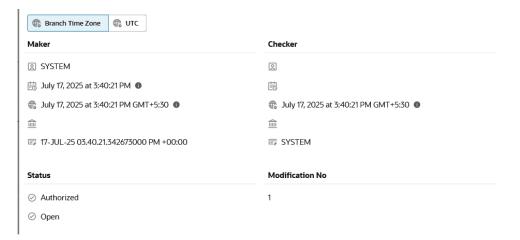> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-12   Task Maintenance - View - Field Description

Field	Description
Task Name	Specify a unique name for the task being created.
Task Description	Specify the description for the task being created. The syntax is: **appId:::<<appId>>;microServiceName:::<<microServiceName>>;contextRoot:::<<contextRoot>>;type:::<< type Of Schedule >>;jobName:::<< JOB to be triggered >>;destination:::<<Topic for which the trigger is defined>>;cronExpression:::<<cronExpression>>** (without spaces) The values that must be provided for the appId, the microServiceName, the contextRoot, and the jobName are detailed in the Task Description Formats table. Some of these tasks come as part of the day 0 set up.

– Click **Audit** to view the **AUDIT** of this screen.

Figure 1-15   Create Tasks - View Audit

1.7 View Tasks Status
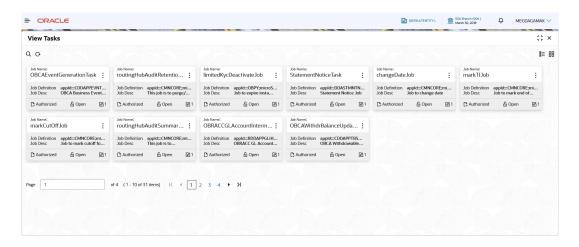
This topic describes the systematic instruction to view a list of existing tasks.

The users are also provided with the option to delete a particular task, if required. The list and card view options are provided on the screen to view the tasks, where in the list view, tasks are listed in tabular form while in card view, user can view in the form of a cards.

1. From **Home** screen, click **Task Management**. Under **Task Management**, click **View Task**.

   The **View Task** screen is displayed.

Figure 1-16   View Task

> (i) **Note**
>
>   The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-13   View Task – Field Description

Field	Description
Job Name	Displays the name of job for which task is created.
Job Definition	Displays the definition of the job task.
Job Description	Displays the description of the Job task.
Authorization Status	Select the authorization status from the drop-down list. The available options are: • **Authorized** • **Rejected** • **Unauthorized**
Record Status	Select the record status from the drop-down list. The available options are: • **Open** • **Closed**

2.   On the **View Tasks** screen, click [search icon] icon.
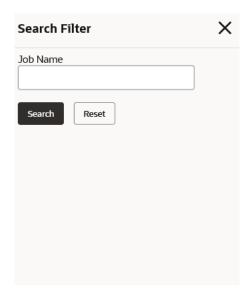
     The **Search Filter** screen is displayed.

Figure 1-17   View Tasks - Search

a. On the **View Tasks - Search** screen, specify the **Search Filter** to fetch the required tasks.

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.

Table 1-14   View Tasks - Search - Field Description

Field	Description
Job Name	Specify the name of job for which task is created.

b. Click **Search** to display the required tasks.

Based on the search criteria the tasks is displayed.

3. Perform one of the following action from the

> ⓘ **Note**
>
> You can perform **Unlock**, **Delete**, **Authorize** or **View** the created tasks.

• Click **Unlock** to modify the created tasks.

The **Tasks Maintenance - Modify** screen is displayed.

• Click **View** to view the created tasks.

Figure 1-18   Create Tasks - View

> ⓘ **Note**
>
> The fields marked as **Required** are mandatory.

For more information on fields, refer to the field description table.
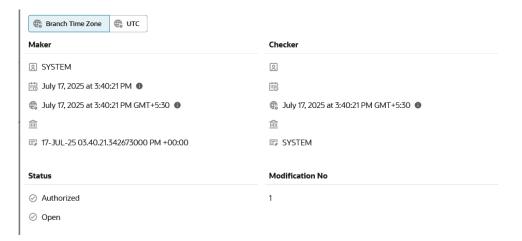
Table 1-15   Task Maintenance - View - Field Description

Field	Description
Task Name	Specify a unique name for the task being created.
Task Description	Specify the description for the task being created. The syntax is: **appId:::<<appId>>;microServiceName:::<<microServiceName>>;contextRoot:::<<contextRoot>>;type:::<< type Of Schedule >>;jobName:::<< JOB to be triggered >>;destination:::<<Topic for which the trigger is defined>>;cronExpression:::<<cronExpression>>** (without spaces) The values that must be provided for the appId, the microServiceName, the contextRoot, and the jobName are detailed in the Task Description Formats table. Some of these tasks come as part of the day 0 set up.

– Click **Audit** to view the **AUDIT** of this screen.

Figure 1-19   Create Tasks - View Audit

1.8 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 1-20   Awaiting Customer Clarification
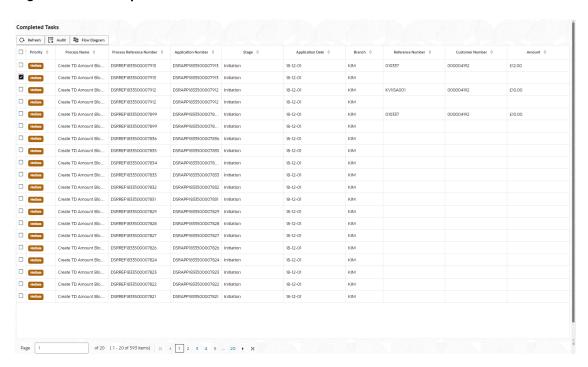
1.9 Completed Tasks

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 1-21   Completed Tasks

Below are the actions performed on the **Completed Tasks** menu:
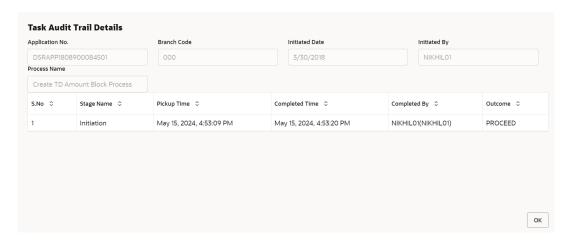
1. **Flow Diagram** - The user can view the process flow and find the completed stages within the selected task in the Completed Tasks menu. The current stage is highlighted in the process flow.

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 1-22   Task Audit Trail Details

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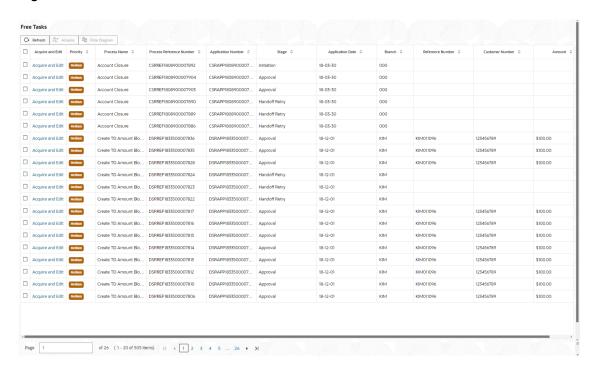
The free tasks menu displays the tasks which are not acquired by any user and for the current user entitled to access.

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 1-23   Free Tasks

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.

1.11 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 1-24   Hold Tasks

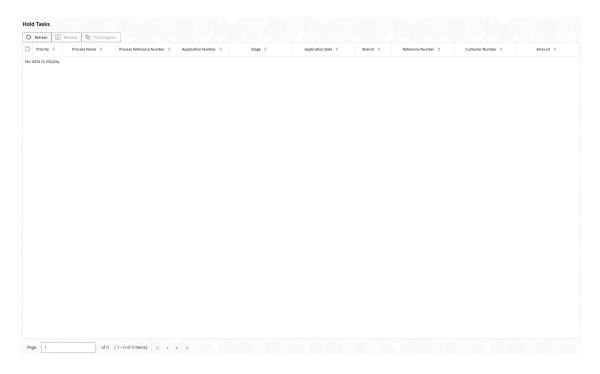The following are the actions performed on the Hold Tasks menu:

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.

1.12 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 1-25   My Pending Tasks

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.

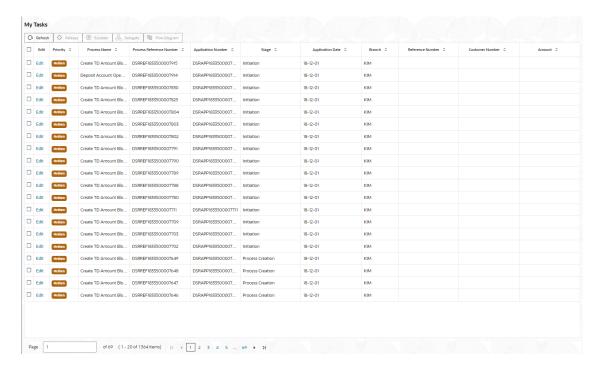6. **Escalate** - Task will be assigned to Supervisor.

1.13 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 1-26   My Tasks

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.

1.14 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 1-27   Search

1.15 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.
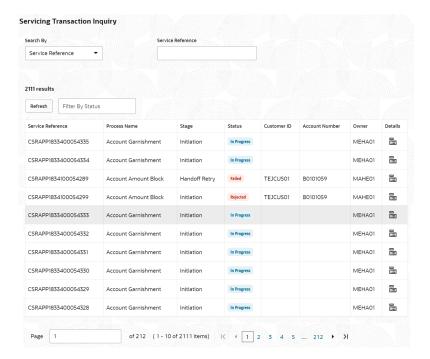
Filter By Status - **Pending Approval**, **Handoff in Progress**, **Failed**, **Rejected**, **In Progress**, and **Approved** are included in the drop-down list. With one filter criteria or multiple, you will fetch the results from the searches.

The following information is displayed on the screen:

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

Figure 1-28   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**

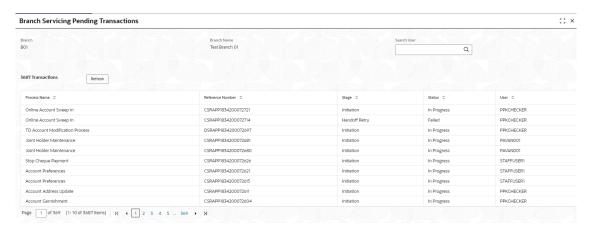• **Outcome**

Figure 1-29   Transaction Details

1.16 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 1-30   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 1-16   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.

1.17 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 1-31   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.

1.18 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

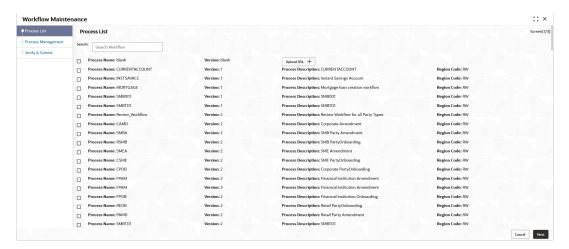• Verify & Submit Screen

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 is displayed.

Figure 1-32   Process List

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

- Click **Search** to search for any of the existing workflows/processes.

- Click **Upload DSL** button to upload a workflow in JSON format.

- Click **Next** to navigate to the next screen.

- 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, in the form of nodes. The **Process Management** screen includes **Workflow Actions** and a toolbar at top right that contains actions:
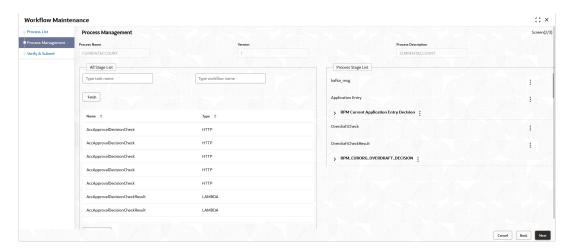
Table 1-17   Process Management

Field	Description
Expand Node	To expand nodes.
Edit Parameters	To modify the parameters of the selected node (stage).
Delete Node	To remove the selected node from the workflow.
Workflow Info	To view the information of the selected process (including name, description and version).
DSL	To view the DSL of the process or for a selected node.
Save button	To save the DSL as JSON at any point of time.

3.   Click **Next**.

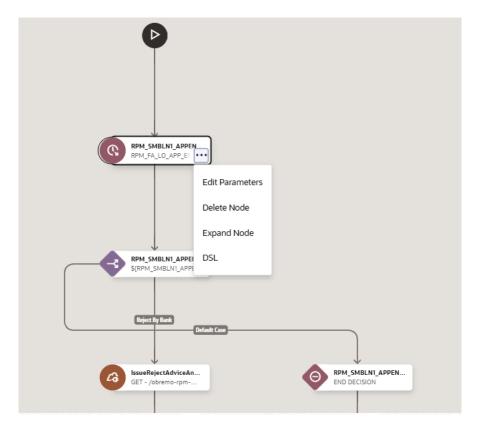The **Process Management** screen is displayed.

Figure 1-33   Process Management

4. On **Process Management** screen, on the individual nodes, click ••• icon to select **Edit Parameters** to edit a stage.

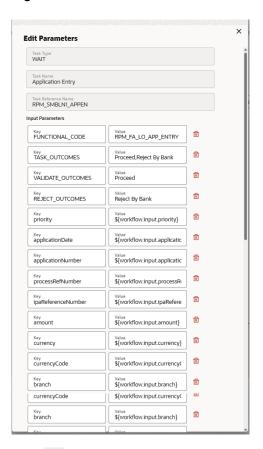**Figure 1-34   Node Options**

a. Click ••• icon to select **Edit Parameters** or select a node and click **Edit Parameters** button to edit a stage.

The **Edit Parameters** screen is displayed.

Figure 1-35   Edit Parameters

b. Click ••• icon to select **DSL** or select the node and click **DSL** button to edit DSL of a stage.
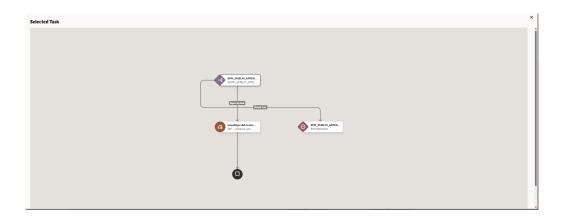
The **DSL** screen is displayed.

Figure 1-36   DSL

c. Click ••• icon to select **Expand Node** or select the node and click **Expand Node** button to edit a stage.

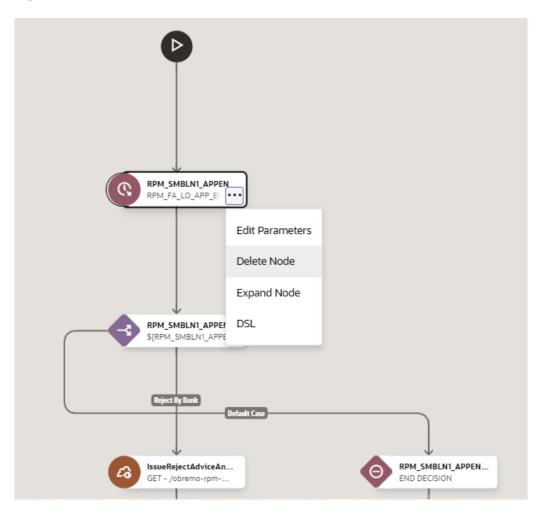The **Expand Node** screen is displayed.

d. Click ⋯ icon to select **Delete Node** or select the node and click **Delete Node** button to del a stage.

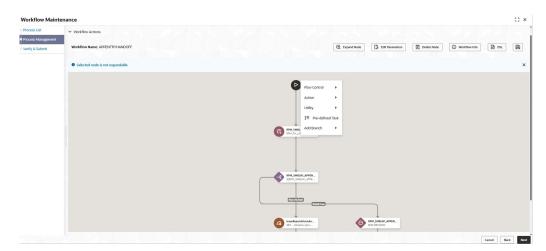The **Delete Node** screen is displayed.

Figure 1-37   Delete Node

Adding a Task

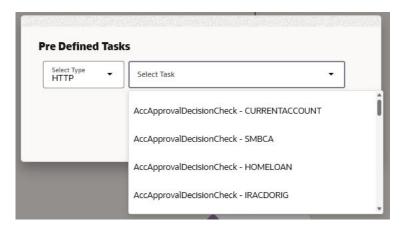a. Click **+** button on paths or the **+** button on Nodes for special cases.

Figure 1-38   Adding a Task

b. The user can create a new task or add an existing task using the pre-defined tasks option.

The **Pre-Defined Tasks** screen is displayed.

Figure 1-39   Pre Defined Tasks

c. On **Pre-Defined Tasks** screen, specify the fields.

For more information, refer to field and description table.

Table 1-18   Pre Defined Tasks

Field	Description
Select Type	Select the type from the drop-down list.
Select Task	Select the task from the drop-down list.

d. To add a new task, click **+** icon to select **Action** and select the task type to displays the from the list.

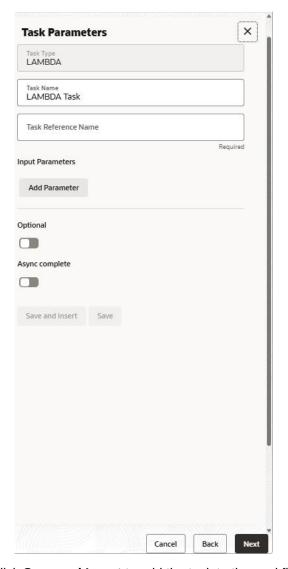The **Task Parameters** screen is displayed.

Figure 1-40   Task Parameters

5. Click **Save and Insert** to add the task to the workflow or **Save** to save the task for future use after completing the necessary information.

6. 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.
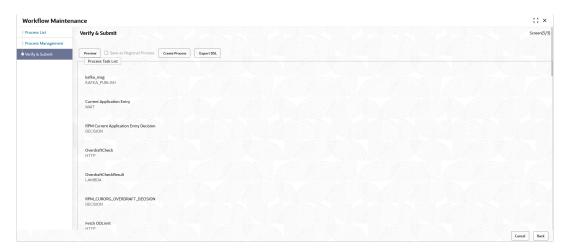
Verify & Submit
The **Verify & Submit** screen displays the process task list with all the new/modified tasks.

7. Click **Next**.

   The **Verify & Submit** screen is displayed.

Figure 1-41   Verify & Submit

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

- **Preview Diagram** - 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.

- **View individual tasks** - Click on a specific task in the list to view the diagram for that task.

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/API Name	Functional Activity Codes	Action	Description
Tasks	CMC_FA_MENU_Tasks	Menu	Task Menu
Completed Task	CMC_FA_SUBMENU_1 _Completed	Completed	Completed Task Menu
Free Task	CMC_FA_SUBMENU_1 _FreeTasks	FreeTasks	Free Task Menu
Hold Task	CMC_FA_SUBMENU_1 _HoldTasks	HoldTasks	Hold Task Menu
My Task	CMC_FA_SUBMENU_1 _MyTasks	MyTasks	My Task Menu
Search Task	CMC_FA_SUBMENU_1 _SEARCH	Search	Task Search
Supervisor Task	CMC_FA_SUBMENU_1 _Supervisor	Supervisor	Supervisor Task Menu
Workflow Maintenance	CMC_FA_SUBMENU_1 _WORKFLOW_MAINT	Workflow Maintenance	Workflow Maintenance
Configure Task	CMC_FA_CONFIGPRO P	Configprop	Configprop Task
Subprocess Task	CMC_FA_SUBMENU_1 _Subprocess	Subprocess	Subprocess Task Menu
	PLATO_FA_TASK_CON FIGURE		Configure Tasks
	PLATO_FA_TASK_NEW		Task Create
	PLATO_FA_TASK_STAT USVIEW		View Task Status
	PLATO_FA_TASK_TRIG GER		Trigger Tasks
	PLATO_FA_TASK_VIE W		View Tasks
	PLATO_FA_JOBTRIGG ER_ABORT		Abort Scheduled Job
	PLATO_FA_JOBTRIGG ER_CREATE		Create Job Trigger Definition
	PLATO_FA_JOBTRIGG ER_DELETE		Delete Job Trigger Definition
	PLATO_FA_JOBTRIGG ER_GET		Job Trigger Definitions
	PLATO_FA_JOBTRIGG ER_SCHEDULE		Reschedule Job Trigger Definition
	PLATO_FA_JOB_CALL BACK		Callback for a Job

Table B-1   (Cont.) List of Functional Activity Codes

Screen Name/API Name	Functional Activity Codes	Action	Description
	PLATO_FA_JOB_EXPLORER		Fetch Trigger Definitions Execution Details
	PLATO_FA_JOB_LAUNCH		Launch Job
	PLATO_FA_JOB_REGISTRY		CRUD Operations On Job Registry Tasks
	PLATO_FA_BATCHFRM_PLATOBATCH_UI_GET_FUNC		UI Get Batch Framework Functionality
	PLATO_FA_BATCHFRM_PLATOBATCH_FUNC		Batch Framework Functionality
	PLATO_FA_BATCH_PLATOBATCH_FUNC		Batch Core Functionality
	PLATO_FA_PLATOBATCH_UI_GET_JOBTRIGGER_MENU		Menu for View Job Trigger

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