

Oracle® Banking Microservices Architecture Tasks User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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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.

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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.
<i>italic</i>	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 .
Collapse All	Used to hide the details in the sections. This button is displayed, once the user click Compare .

Table (Cont.) Basic Actions

Action	Description
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. <div style="border-left: 2px solid #0070C0; padding-left: 10px; margin-left: 150px;"> <p> Note: The fields which are marked with asterisk are mandatory.</p> </div>
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 Tasks](#)
- [Search](#)
- [Supervisor Tasks](#)
- [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

Awaiting Customer Clarification

Refresh Audit Flow Diagram

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

No data to display.

Page 1 of 0 (1 - 0 of 0 items)

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

Figure 1-2 Completed Tasks

Completed Tasks

Refresh Audit Flow Diagram

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
Medium	Retail Loan Origination...	006VELN010026143	006APP000060557	Account Parameter Setup	18-03-30	006	006007061	£50,000.00
Medium	Retail Onboarding	231712946	006APP000060556	Approval	18-03-30	006	231712946	
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	CC Approval	18-03-30	006		£200,000.00
Medium	Retail Onboarding	231712946	006APP000060556	Recommendation	18-03-30	006	231712946	
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	CC Assessment	18-03-30	006		£200,000.00
Medium	Retail Onboarding	231712946	006APP000060556	KYC	18-03-30	006		
Medium	CcOriginationProcess	006MASTER0003153	006APP000060556	Application Entry	18-03-30	006		£200,000.00
Medium	Retail Application Initia...	006INIT000060556	006APP000060556	Application Initiation	18-03-30	006		
Medium	Retail Onboarding	231702870	006APP000060315	KYC	18-03-30	006		

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

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

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

Figure 1-3 Free Tasks

Acquire & Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
Acquire & Edit	Medium	CcOriginationProcess	006CCREWA0003198	006APP0000061806	Application Entry	18-03-30	006	006007147	E60,000.00
Acquire & Edit		Retail Loan Originatio...	006HMLN10026217	006APP0000061775	Application Entry	18-03-30	006		E56,222.00
Acquire & Edit		Small and Medium Bu...	006SMBCA10012712	006APP0000061573	Overdraft Limit Details	18-03-30	006		
Acquire & Edit	Medium	SMB Onboarding	231743156	006APP0000061573	KYC	18-03-30	006		
Acquire & Edit	Medium	Retail Loan Originatio...	006PRLN020026214	006APP0000061770	Application Enrichment	18-03-30	006		E54,500.00
Acquire & Edit		Retail Application Initi...	006INIT0000061750	006APP0000061750	Application Initiation	18-03-30	006		
Acquire & Edit	Medium	Retail Loan Originatio...	006VELN010026185	006APP0000061718	Account Parameter Setup	18-03-30	006	006007061	E50,000.00
Acquire & Edit	Medium	Retail Loan Originatio...	006HMLN10026186	006APP0000061719	Application Entry	18-03-30	006	006007061	E12,109,192.00
Acquire & Edit	Medium	Retail Loan Originatio...	006VELN010026162	006APP0000061690	Handoff Retry	18-03-30	006	006007061	E50,000.00
Acquire & Edit	Medium	SMB Loan Origination	006SMTL010026161	006APP0000061689	Handoff Retry	18-03-30	006	006007063	E50,000.00

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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.

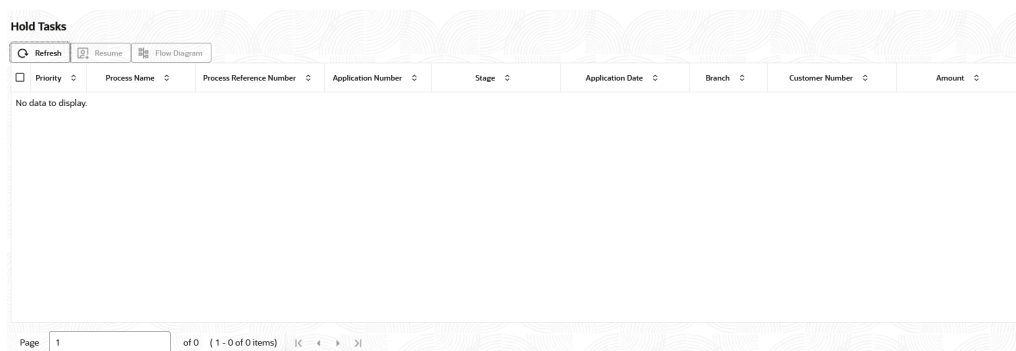
1.4 Hold Tasks

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

Figure 1-4 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. **Resume** - Select the task and click **Resume** button to move the task to **My Tasks** menu and then edit.
3. **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.
4. **Refresh** - Click **Refresh** button to refresh the task list.

1.5 My Tasks

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

The 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 1-5 My Tasks

My Tasks

Refresh Release Escalate Delegate Flow Diagram

<input type="checkbox"/>	Edit	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
<input type="checkbox"/>	Edit		Retail Application Initi...	006INIT000061620	006APPO00061620	Application Initiation	18-05-30	006		
<input type="checkbox"/>	Edit		Retail Application Initi...	006INIT000061604	006APPO00061604	Application Initiation	18-05-30	006		
<input type="checkbox"/>	Edit	Medium	Small and Medium Bu...	006SMB5B10016421	006APPO00061572	Application Entry	18-05-30	006	006007063	
<input type="checkbox"/>	Edit	Medium	Retail Onboarding	231733107	006APPO00061556	KYC	18-05-30	006		
<input type="checkbox"/>	Edit		SMB Loan Origination	006SMBL010026140	006APPO00061546	Application Entry	18-03-30	006		\$99,000.00
<input type="checkbox"/>	Edit	Medium	Retail Onboarding	231733040	006APPO00061284	KYC	18-05-30	006		
<input type="checkbox"/>	Edit	Medium	Retail Loan Originatio...	006ALJHMLN0025429	006APPO00060315	Application Enrichment	18-05-30	006		£60,000.00
<input type="checkbox"/>	Edit	Medium	Retail Loan Originatio...	006VELN010025285	006APPO00060057	Application Enrichment	18-05-30	006	006007061	£50,000.00
<input type="checkbox"/>	Edit	Medium	Retail Loan Originatio...	006EDLN010025410	006APPO00060273	Application Entry	18-05-30	006	006007061	£50,000.00
<input type="checkbox"/>	Edit		Current Account Origi...	006CJRPCA0012495	006APPO00060142	Application Entry	18-05-30	006		

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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.

1.6 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 Name**
- **Branch Name**
- **Tasks**
- **Priority**
- **Process and Stage**
- **Entity Type**
- **Amount**

Figure 1-6 Search

The screenshot shows a search interface with a sidebar of filters and a main task list area. The filters include:

- Application Number (dropdown)
- Customer Id (text input)
- Party Id (text input)
- Branch Name (dropdown)
- Processes/Tasks (checkbox)
- Priority (checkbox)
- Process (checkbox)
- Amount (checkbox)

The task list area shows "No items to display." and a pagination control: "Page 1 of 0 (1 - 0 of 0 items) | < < > >".

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

1. **Acquire and Edit** - Click **Acquire and Edit** to acquire and edit the task.
2. **Flow Diagram** - 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. **Audit** – Click **Audit** to view the task history.
4. **Resume** - Select the task and click **Resume** to move the task to **My Tasks** menu and edit
5. **Edit** – Click **Edit** to edit the selected task.
6. **Release** - Click **Release** to release the selected task from **My Tasks** to **Free Tasks** menu
7. **View** – Click **View** to view the task in read only mode

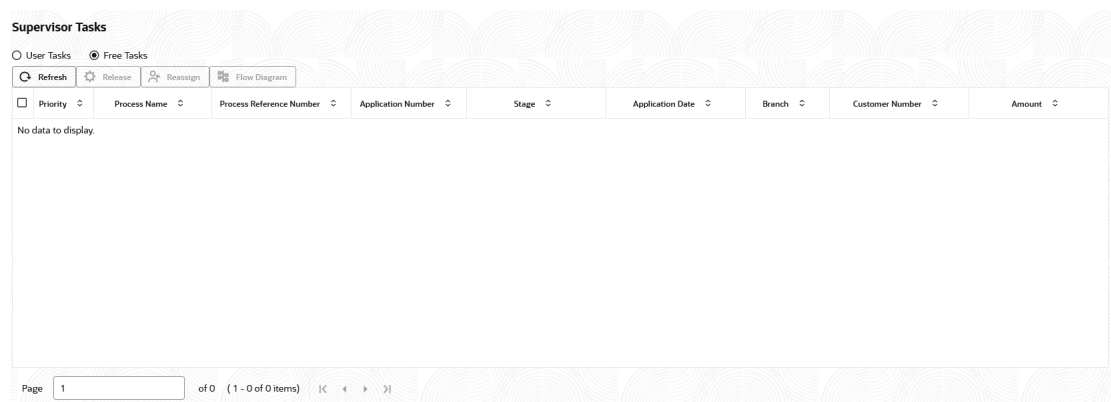
1.7 Supervisor Tasks

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

The following information is displayed on the task list:

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

Figure 1-7 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.

1.8 Supervisor Tasks

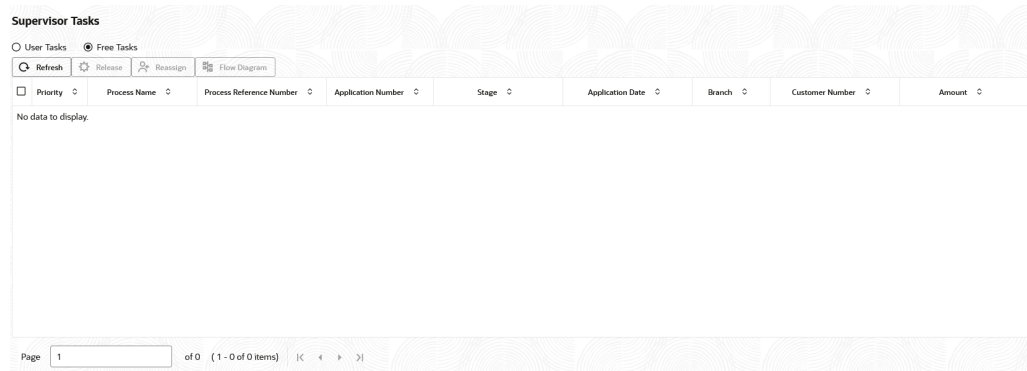
Supervisor Tasks menu displays the 'User Tasks' or 'Free Tasks' based upon the option that is selected.

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 1-8 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.

1.9 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.

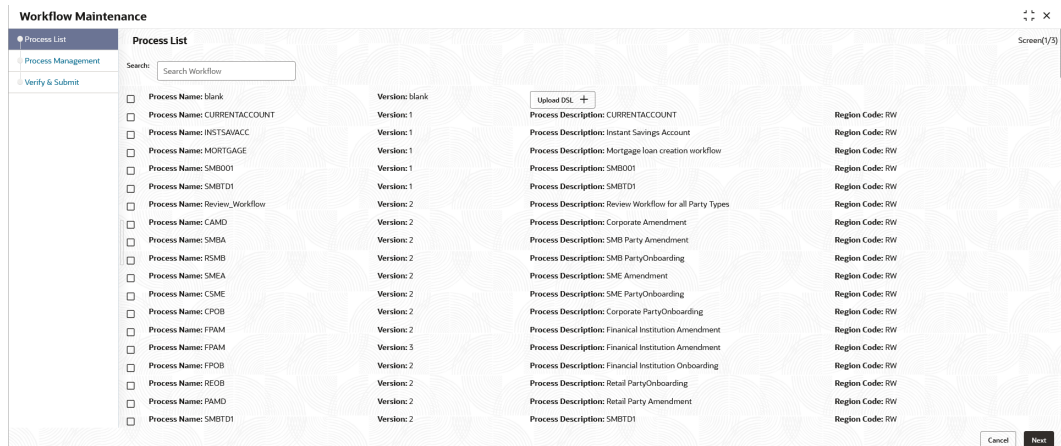
Process List

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 1-9 Process List



- 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.

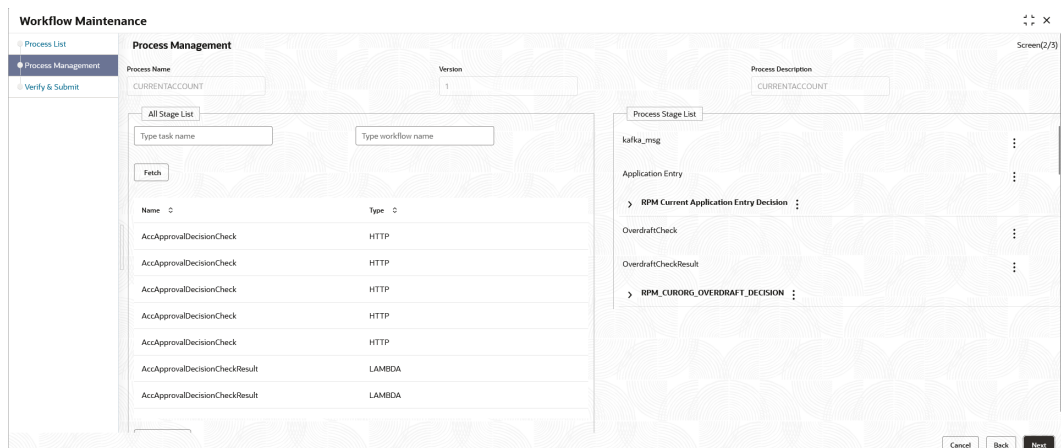
Process Management

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**.

- Click **Next**.

The **Process Management** screen displays.

Figure 1-10 Process Management



- Drag and drop any stage from the **All Stage List** to the **Process Stage List** to add new stages in the process. The user can also perform the following actions in the **Process Management** screen:
 - Click and select **Edit** to edit a stage in the **Process Stage List**.
The **Modify Task** screen displays.

Figure 1-11 Modify Task

Input Param	Value
kafka_request	[Object Object]

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

- 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.

Verify & Submit

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

6. Click **Next**.
The **Verify & Submit** screen displays.

Figure 1-12 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

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