

# 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.

## Audience

This guide is intended for the User/User Roles.

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## 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  |
|------------------------|--|
| <b>boldface</b>        | 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.                          |
| <code>monospace</code> | 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  |
|---------------------|--|
| <b>Approve</b>      | Used to approve the initiated report.<br>This button is displayed, once the user click <b>Authorize</b> .  |
| <b>Audit</b>        | Used to view the maker details, checker details, and report status.  |
| <b>Authorize</b>    | Used to authorize the report created.<br>A maker of the screen is not allowed to authorize the report. Only a checker can authorize a report, created by a maker.            |
| <b>Close</b>        | Used to close a record.<br>This action is available only when a record is created.   |
| <b>Confirm</b>      | Used to confirm the performed action.  |
| <b>Cancel</b>       | Used to cancel the performed action.   |
| <b>Compare</b>      | Used to view the comparison through the field values of old record and the current record.<br>This button is displayed in the widget, once the user click <b>Authorize</b> . |
| <b>Collapse All</b> | Used to hide the details in the sections.<br>This button is displayed, once the user click <b>Compare</b> .  |
| <b>Expand All</b>   | Used to expand and view all the details in the sections.<br>This button is displayed, once the user click <b>Compare</b> .   |

Table (Cont.) Basic Actions

| Action                      | Description   |
|-----------------------------|---|
| <b>New</b>                  | Used to add a new record.<br>When the user click <b>New</b> , the system displays a new record enabling to specify the required data.<br><br><div>  <b>Note:</b><br/>The fields which are marked with required are mandatory. </div> |
| <b>OK</b>                   | Used to confirm the details in the screen.  |
| <b>Save</b>                 | Used to save the details entered or selected in the screen.   |
| <b>View</b>                 | Used to view the report details in a particular modification stage.<br>This button is displayed in the widget, once the user click <b>Authorize</b> .   |
| <b>View Difference only</b> | Used to view a comparison through the field element values of old record and the current record, which has undergone changes.<br>This button is displayed, once the user click <b>Compare</b> .   |
| <b>Unlock</b>               | Used to update the details of an existing record.<br>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

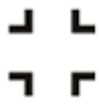

















| Symbol/Icon   | Function |
|---|----------|
|  | Minimize |
|  | Maximize |
|  | Close    |

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:

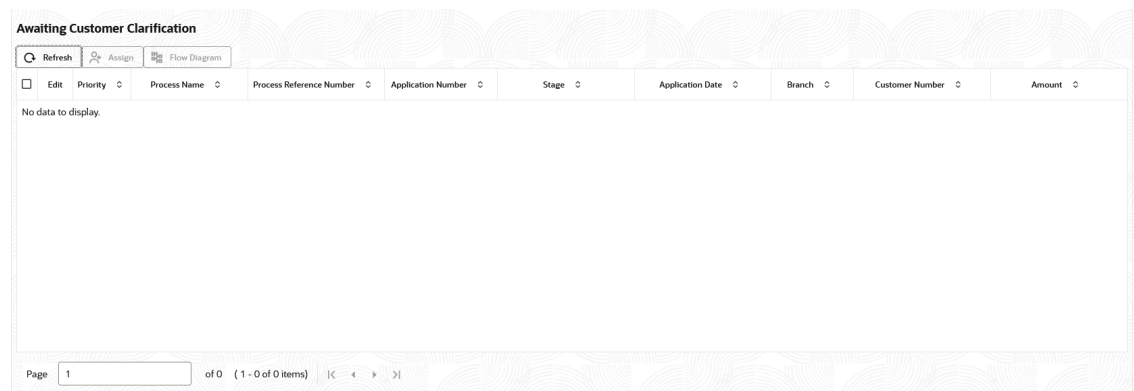
### Awaiting Customer Clarification

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**



### Completed Tasks

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

The following information is displayed on the task list:

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

Figure 1-2 Completed Tasks

Completed Tasks

| Refresh                             | Audit                    | Flow Diagram             | Priority | Process Name            | Process Reference Number | Application Number  | Stage      | Application Date | Branch | Reference Number | Customer Number | Amount |
|-------------------------------------|--------------------------|--------------------------|----------|-------------------------|--------------------------|---------------------|------------|------------------|--------|------------------|-----------------|--------|
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007915      | DSRAPP1833500007915 | Initiation | 18-12-01         | KIM    | 010337           | 000004192       | £12.00 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007915      | DSRAPP1833500007915 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007912      | DSRAPP1833500007912 | Initiation | 18-12-01         | KIM    | KV1ISA001        | 000004192       | £10.00 |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007912      | DSRAPP1833500007912 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007899      | DSRAPP1833500007899 | Initiation | 18-12-01         | KIM    | 010337           | 000004192       | £10.00 |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007899      | DSRAPP1833500007899 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007836      | DSRAPP1833500007836 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007835      | DSRAPP1833500007835 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007834      | DSRAPP1833500007834 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007833      | DSRAPP1833500007833 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007832      | DSRAPP1833500007832 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007831      | DSRAPP1833500007831 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007829      | DSRAPP1833500007829 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007828      | DSRAPP1833500007828 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007827      | DSRAPP1833500007827 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007826      | DSRAPP1833500007826 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007824      | DSRAPP1833500007824 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007823      | DSRAPP1833500007823 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007822      | DSRAPP1833500007822 | Initiation | 18-12-01         | KIM    |                  |                 |        |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Medium   | Create TD Amount Blo... | DSRREF1833500007821      | DSRAPP1833500007821 | Initiation | 18-12-01         | KIM    |                  |                 |        |

Page 1 of 20 (1 - 20 of 393 items) | 1 2 3 4 5 ... 20 > X |

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

1. **Flow Diagram** - The user can view the process flow and find the completed stages within the selected task in the Completed Tasks menu. The current stage is highlighted in the process flow.
2. **Refresh** - Click the **Refresh** button, to refresh the task list.
3. The user can select the check box and click on **Audit** to view the details of the task's audits.  
The **Task Audit Trail Details** screen is displayed with the task details.

**Figure 1-3 Task Audit Trail Details**

**Task Audit Trail Details**

Application No.  
DSRAPPI808900084501

Branch Code  
000

Initiated Date  
3/30/2018

Initiated By  
NIKHIL01

Process Name  
Create TD Amount Block Process

| S.No | Stage Name | Pickup Time              | Completed Time           | Completed By       | Outcome |
|------|------------|--------------------------|--------------------------|--------------------|---------|
| 1    | Initiation | May 15, 2024, 4:53:09 PM | May 15, 2024, 4:53:20 PM | NIKHIL01(NIKHIL01) | PROCEED |

OK

## Free Tasks

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

The following information is displayed on the task list:

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

Figure 1-4 Free Tasks

Free Tasks

Refresh Acquire Flow Diagram

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

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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.

## Hold Tasks

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

The following information is displayed on the task list:

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

- **Amount**

**Figure 1-5 Hold Tasks**

Hold Tasks

Refresh Resume Flow Diagram

| Priority            | Process Name | Process Reference Number | Application Number | Stage | Application Date | Branch | Reference Number | Customer Number | Amount |
|---------------------|--------------|--------------------------|--------------------|-------|------------------|--------|------------------|-----------------|--------|
| No data to display. |              |                          |                    |       |                  |        |                  |                 |        |

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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.

## My Pending Tasks



### Note:

This screen is applicable only for **Branch Servicing**.

My Pending Tasks menu displays,

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

The following information is displayed on the task list:

- **Edit**
  - **Process Name**
  - **Service Reference**
  - **Stage** - Displays the current stage of the servicing transaction. The possible values are **Initiation**, **Approval**, or **Handoff Retry**.
  - **Status** - Displays the current status of the servicing transaction relevant to the Stage.
    1. If the maker clicks on **Save and Close** in the transaction screen, the transaction will be in Initiation stage and the Status would be displayed as **Inprogress**.
    2. If the checker acquires a servicing transaction from the Free Tasks page, the transaction will be in Approval stage and the Status would be displayed as **Pending Approval**.
    3. If the checker rejects a servicing transaction, it will be returned to the maker. The transaction will be in Initiation stage and the Status would be displayed as **Rejected**.
    4. If the transaction fails in the authorization stage, it will be returned to the checker. The transaction will be in Handoff Retry stage and the Status would be displayed as **Failed**.
- Other statuses that are not displayed on the My Pending Tasks page are,
1. **Reject By Bank** - This status is updated against a servicing transaction when the maker reopens a transaction that was saved and closed earlier and deletes it. The status of the deleted transaction is updated in the Completed Tasks under the **Audit** details tab.
  2. **Completed** - This status is updated against a servicing transaction when the transaction is approved and the details are successfully updated in the host system. The status of the completed transaction is updated in the Completed Tasks under the **Audit** details tab.
- **Branch**
  - **Reference Number** - For servicing transactions, this column is updated with the Account or Deposit Number. In case if the transaction does not start with the account number (For example, Consolidated Adhoc Account Statement), this column will remain blank.
  - **Customer Number** - For all servicing transactions, this column is updated with the Customer ID that is linked to the account number.
  - **Amount**
  - **User ID**

Figure 1-6 My Pending Tasks

My Pending Tasks

| Refresh              | Release                         | Escalate   | Delegate   | Flow Diagram |                  |                 |        |           |  |  |
|----------------------|---------------------------------|------------|------------|--------------|------------------|-----------------|--------|-----------|--|--|
| Service Reference    | Process Name                    | Stage      | Status     | Branch       | Reference Number | Customer Number | Amount | User ID   |  |  |
| <a href="#">Edit</a> | Modify Sweep In to Account      | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Close Scheduled Transfer        | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Joint holder Details Update     | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Deposit Top Up                  | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Deposit Top Up                  | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Address Update                  | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Deposit Top Up                  | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Deposit Payout Modification     | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | TD Account Modification Process | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | TD Account Modification Process | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |
| <a href="#">Edit</a> | Deposit Top Up                  | Initiation | Inprogress | HAR          |                  |                 |        | CASADEMOI |  |  |

Page 1 of 28 (1 - 20 of 551 Items) 1 2 3 4 5 ... 28 >

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

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

## My Tasks

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

The following information is displayed on the task list:

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



Figure 1-7 My Tasks

My Tasks

Refresh

Release

Escalate

Delegate

Flow Diagram

| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div></div></div></div> <div>Priority</div> | <div><div><div></div></div></div> <div>Process Name</div> | <div><div><div></div></div></div> <div>Process Reference Number</div> | <div><div><div></div></div></div> <div>Application Number</div> | <div><div><div></div></div></div> <div>Stage</div> | <div><div><div></div></div></div> <div>Application Date</div> | <div><div><div></div></div></div> <div>Branch</div> | <div><div><div></div></div></div> <div>Reference Number</div> | <div><div><div></div></div></div> <div>Customer Number</div> | <div><div><div></div></div></div> <div>Amount</div> |
|---|---|---|---|---|--|---|---|---|--|---|
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF183350007915  | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Deposit Account Ope...                                    | DSRREF1833500007914   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007830   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007825   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007804   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007803   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007802   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007791   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007790   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007789   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007788   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007780   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007771   | DSRAPP1833500007711   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007709   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007703   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007702   | DSRAPP1833500007...   | Initiation   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007649   | DSRAPP1833500007...   | Process Creation                                   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007648   | DSRAPP1833500007...   | Process Creation                                   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007647   | DSRAPP1833500007...   | Process Creation                                   | 18-12-01  | KIM   |   |  |   |
| <div><div><div></div></div></div> <div>Edit</div> | <div><div><div>Medium</div></div></div>               | Create TD Amount Blo...                                   | DSRREF1833500007646   | DSRAPP1833500007...   | Process Creation                                   | 18-12-01  | KIM   |   |  |   |

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of 69 (1 - 20 of 1364 items)

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Page 1 of 69 ( 1 - 20 of 1364 items ) &lt; 1 2 3 4 5 ... 69 &gt;

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.

## Search

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

- **Application Number**
- **Customer ID**
- **Party ID**
- **Branch Name**
- **Processes/Tasks**
- **Priority**
- **Process**
- **Amount**

Figure 1-8 Search

The screenshot shows a web application interface for searching servicing transactions. On the left, there is a 'Search' sidebar with a 'Filters' button and a 'Clear Filters' button. The sidebar contains several filter categories: 'Application Number' (a dropdown menu with 'Select Application Number'), 'Customer Id' (a text input with a search icon), 'Party Id' (a text input with a search icon), 'Branch Name' (a dropdown menu with 'Select Branch'), and a list of expandable filter categories: 'Processes/Tasks', 'Priority', 'Process', and 'Amount'. Each category has a search icon and a close button (X). At the bottom of the sidebar is a 'Fetch' button. On the right, the 'Task List' section displays 'No items to display.' Below this, there is a pagination bar showing 'Page 1 of 0 (1 - 0 of 0 items)' and navigation icons for previous, next, and other page controls.

## Servicing Transaction Inquiry

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

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

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

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

The following information is displayed on the screen:

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

Figure 1-9 Servicing Transaction Inquiry

Servicing Transaction Inquiry

Search By  
Service Reference

Service Reference

2111 results

Refresh Filter By Status

| Service Reference   | Process Name         | Stage         | Status      | Customer ID | Account Number | Owner  | Details |
|---------------------|----------------------|---------------|-------------|-------------|----------------|--------|---------|
| CSRAPP1833400054335 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054334 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1834100054289 | Account Amount Block | Handoff Retry | Failed      | TEJCUS01    | B0101059       | MAHE01 |         |
| CSRAPP1834100054299 | Account Amount Block | Initiation    | Rejected    | TEJCUS01    | B0101059       | MAHE01 |         |
| CSRAPP1833400054333 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054332 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054331 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054330 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054329 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |
| CSRAPP1833400054328 | Account Garnishment  | Initiation    | In Progress |             |                | MEHA01 |         |

Page 1 of 212 (1 - 10 of 2111 items) < 1 2 3 4 5 ... 212 >

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

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

**Figure 1-10 Transaction Details**

## Transaction Details



|                          |                     |
|--------------------------|---------------------|
| Process Name             | Service Reference   |
| Joint Holder Maintenance | CSRAPP2303200056608 |
| Application Status       |                     |
| Approved                 |                     |

| Stage      | Date and Time        | User ID   | Status    | Outcome |
|------------|----------------------|-----------|-----------|---------|
| Approval   | May 30, 2024 3:26 PM | KALPESH02 | Completed | PROCEED |
| Initiation | May 30, 2024 3:26 PM | KALPESH01 | Completed | PROCEED |

## Branch Servicing Pending Transactions View

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

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

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

**Figure 1-11 Branch Servicing pending Transactions**

Branch Servicing Pending Transactions

Branch  
B01

Branch Name  
Test Branch 01

Search User

3687 Transactions

Refresh

| Process Name                    | Reference Number    | Stage         | Status      | User        |
|---------------------------------|---------------------|---------------|-------------|-------------|
| Online Account Sweep In         | CSRAPP18S4200072721 | Initiation    | In Progress | PPKICHECKER |
| Online Account Sweep In         | CSRAPP18S4200072714 | Handoff Retry | Failed      | PPKICHECKER |
| TD Account Modification Process | DSRAPP18S4200072697 | Initiation    | In Progress | PPKICHECKER |
| Joint Holder Maintenance        | CSRAPP18S4200072681 | Initiation    | In Progress | PAVAN001    |
| Joint Holder Maintenance        | CSRAPP18S4200072680 | Initiation    | In Progress | PAVAN001    |
| Stop Cheque Payment             | CSRAPP18S4200072626 | Initiation    | In Progress | STAFFUSER1  |
| Account Preferences             | CSRAPP18S4200072621 | Initiation    | In Progress | STAFFUSER1  |
| Account Preferences             | CSRAPP18S4200072615 | Initiation    | In Progress | STAFFUSER1  |
| Account Address Update          | CSRAPP18S4200072611 | Initiation    | In Progress | PPKICHECKER |
| Account Garnishment             | CSRAPP18S4200072604 | Initiation    | In Progress | PPKICHECKER |

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(1-10 of 3687 items)

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Page 1 of 369 (1-10 of 3687 items) | < 1 2 3 4 5 ... 369 > |

**Note:**

This screen displays the pending branch servicing transactions that are configured for pending transaction checks. By default, all branch servicing screens are configured for pending transaction checks, and it is allowed to modify them in the **CMN\_TM\_TRAN\_CONFIG** table.

**Table 1-1 Branch Servicing Pending Transactions**

| Field                   | Description  |
|-------------------------|--|
| <b>Branch</b>           | Display the user logged in branch and the pending transactions displayed for this branch.  |
| <b>Branch Name</b>      | Display the branch name.   |
| <b>Search User</b>      | 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 <b>User ID</b> .   |
| <b>Refresh</b>          | Click on this button to refresh the details.   |
| <b>Process Name</b>     | Display the process name for the pending transactions.   |
| <b>Reference Number</b> | Display the related Reference Number for the pending transactions.   |
| <b>Stage</b>            | Display the current stage of pending transaction.  |
| <b>Status</b>           | Display the current status of pending transaction.   |
| <b>User</b>             | Display the user ID with whom the transaction is pending. <div><b>Note:</b><br/>If the transaction is not assigned to any user, the last actioned user ID should be displayed for the pending transactions.</div> |

## Supervisor Tasks

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

The following information is displayed on the task list:

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

- **Amount**

**Figure 1-12 Supervisor Task**

Following actions can be performed on the Supervisor Task menu:

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

## 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 is displayed.

**Figure 1-13 Process List**

| Process Name    | Version    | Process Description                                      | Region Code     |
|-----------------|------------|--|-----------------|
| blank           | blank      |  |                 |
| CURRENTACCOUNT  | Version: 1 | Process Description: CURRENTACCOUNT                      | Region Code: RW |
| INSTSAVACC      | Version: 1 | Process Description: Instant Savings Account             | Region Code: RW |
| MORTGAGE        | Version: 1 | Process Description: Mortgage loan creation workflow     | Region Code: RW |
| SMB001          | Version: 1 | Process Description: SMB001                              | Region Code: RW |
| SMBTD1          | Version: 1 | Process Description: SMBTD1                              | Region Code: RW |
| Review_Workflow | Version: 2 | Process Description: Review Workflow for all Party Types | Region Code: RW |
| CAMD            | Version: 2 | Process Description: Corporate Amendment                 | Region Code: RW |
| SMBA            | Version: 2 | Process Description: SMB Party Amendment                 | Region Code: RW |
| RSMB            | Version: 2 | Process Description: SMB Party Onboarding                | Region Code: RW |
| SMEA            | Version: 2 | Process Description: SME Amendment                       | Region Code: RW |
| CSME            | Version: 2 | Process Description: SME Party Onboarding                | Region Code: RW |
| CPOB            | Version: 2 | Process Description: Corporate Party Onboarding          | Region Code: RW |
| FPAM            | Version: 2 | Process Description: Financial Institution Amendment     | Region Code: RW |
| FPOB            | Version: 2 | Process Description: Financial Institution Onboarding    | Region Code: RW |
| REOB            | Version: 2 | Process Description: Retail Party Onboarding             | Region Code: RW |
| PAMD            | Version: 2 | Process Description: Retail Party Amendment              | Region Code: RW |
| SMBTD1          | Version: 2 | Process Description: SMBTD1                              | Region Code: RW |

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:

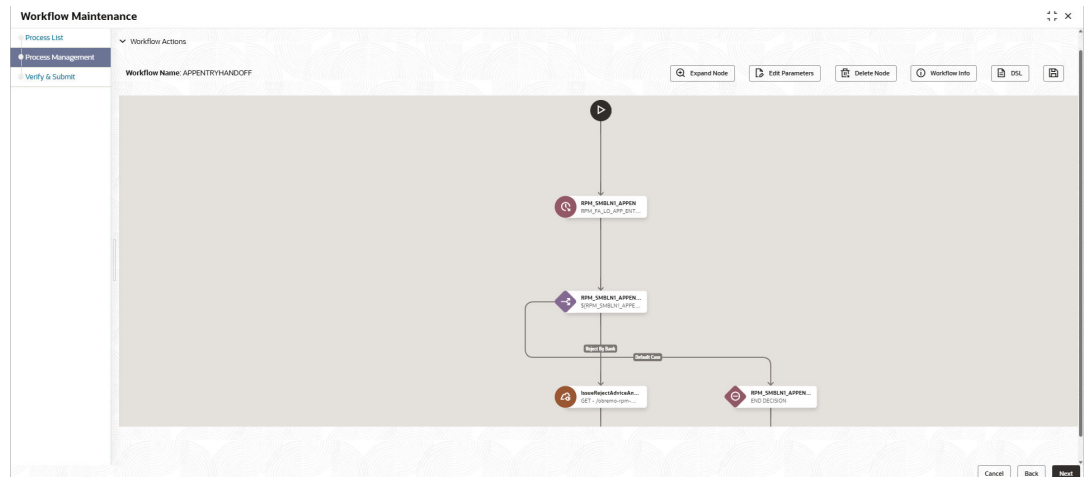
**Table 1-2 Process Management**

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

3. Click **Next**.

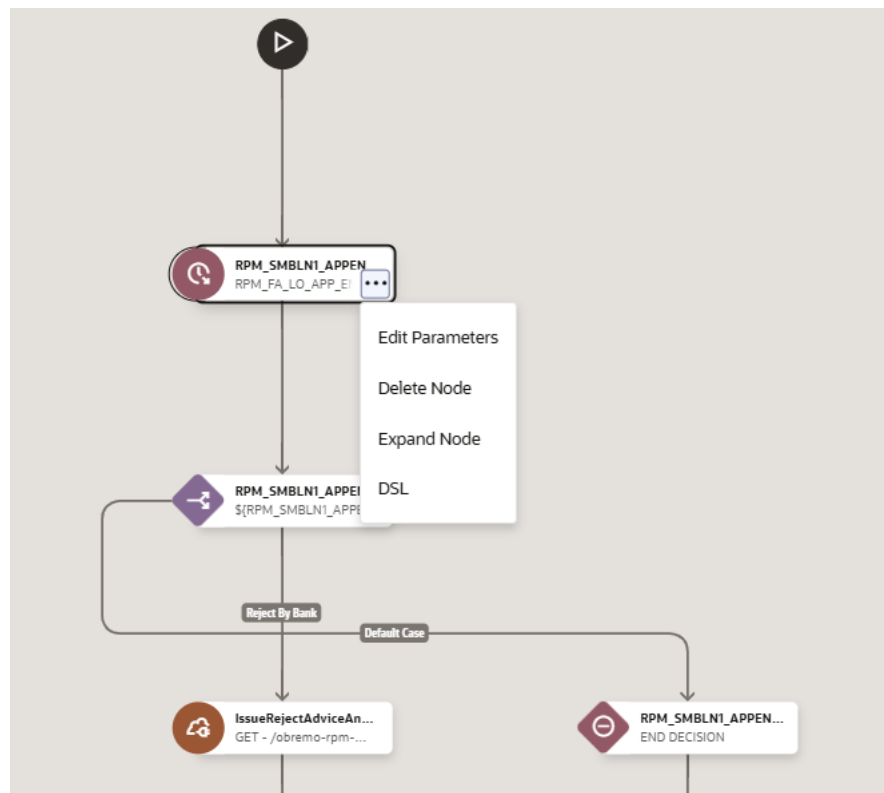
The **Process Management** screen is displayed.

Figure 1-14 Process Management



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

Figure 1-15 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 1-16 Edit Parameters**

| Key                | Value                        |
|--------------------|------------------------------|
| FUNCTIONAL_CODE    | RPM_FA_LO_APP_ENTRY          |
| TASK_OUTCOMES      | Proceed, Reject By Bank      |
| VALIDATE_OUTCOMES  | Proceed                      |
| REJECT_OUTCOMES    | Reject By Bank               |
| priority           | \${workflow.input.priority}  |
| applicationDate    | \${workflow.input.applicatic |
| applicationNumber  | \${workflow.input.applicatic |
| processRefNumber   | \${workflow.input.processR   |
| ipaReferenceNumber | \${workflow.input.ipaRefere  |
| amount             | \${workflow.input.amount}    |
| currency           | \${workflow.input.currency}  |
| currencyCode       | \${workflow.input.currencyt  |
| branch             | \${workflow.input.branch}    |
| currencyCode       | \${workflow.input.currencyt  |
| branch             | \${workflow.input.branch}    |

- 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.

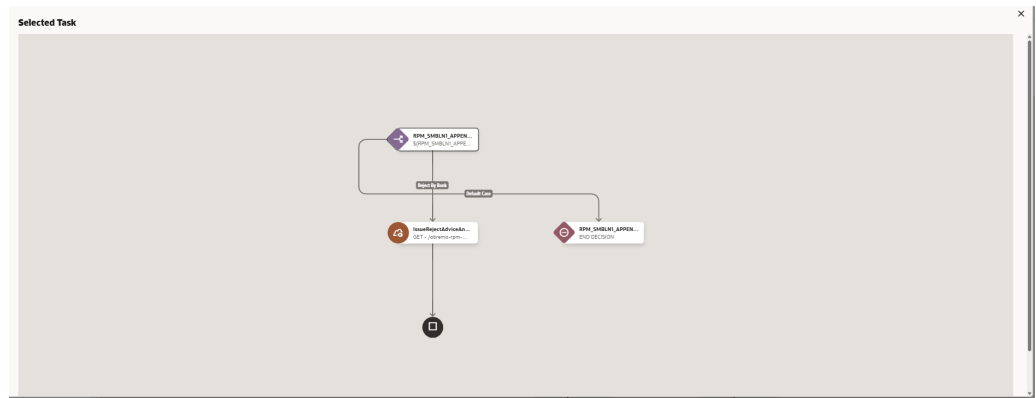
**Figure 1-17 DSL**

```

DSL
1 {
2   "asyncCompleta": false,
3   "inputParameters": {
4     "FUNCTIONAL_CODE": "RPM_FA_LO_APP_ENTRY",
5     "TASK_OUTCOMES": [
6       "Proceed",
7       "Reject By Bank"
8     ],
9     "VALIDATE_OUTCOMES": [
10      "Proceed"
11    ],
12    "REJECT_OUTCOMES": [
13      "Reject By Bank"
14    ],
15    "priority": "${workflow.input.priority}",
16    "applicationDate": "${workflow.input.applicationDate}",
17    "applicationNumber": "${workflow.input.applicationNumber}",
18    "processRefNumber": "${workflow.input.processRefNumber}",
19    "ipaReferenceNumber": "${workflow.input.ipaReferenceNumber}",
20    "amount": "${workflow.input.amount}",
21    "currency": "${workflow.input.currency}",
22    "currencyCode": "${workflow.input.currencyCode}",
23    "branch": "${workflow.input.branch}",
24    "currentBranch": "${workflow.input.currentBranch}",
25    "user": "${workflow.input.user}",
26    "customerNumber": "${workflow.input.customerNumber}",
27    "processNumber": "${workflow.input.processNumber}",
28    "simplifiedApplication": "${workflow.input.simplifiedApplication}",
29    "processCode": "${workflow.input.processCode}",
30    "stage": "Application Entry",
31    "lifecycleCode": "loadrig",
32    "moduleCode": "NOD"
33  },
34  "name": "Application Entry",
35  "isTotal": false
36 }
  
```

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

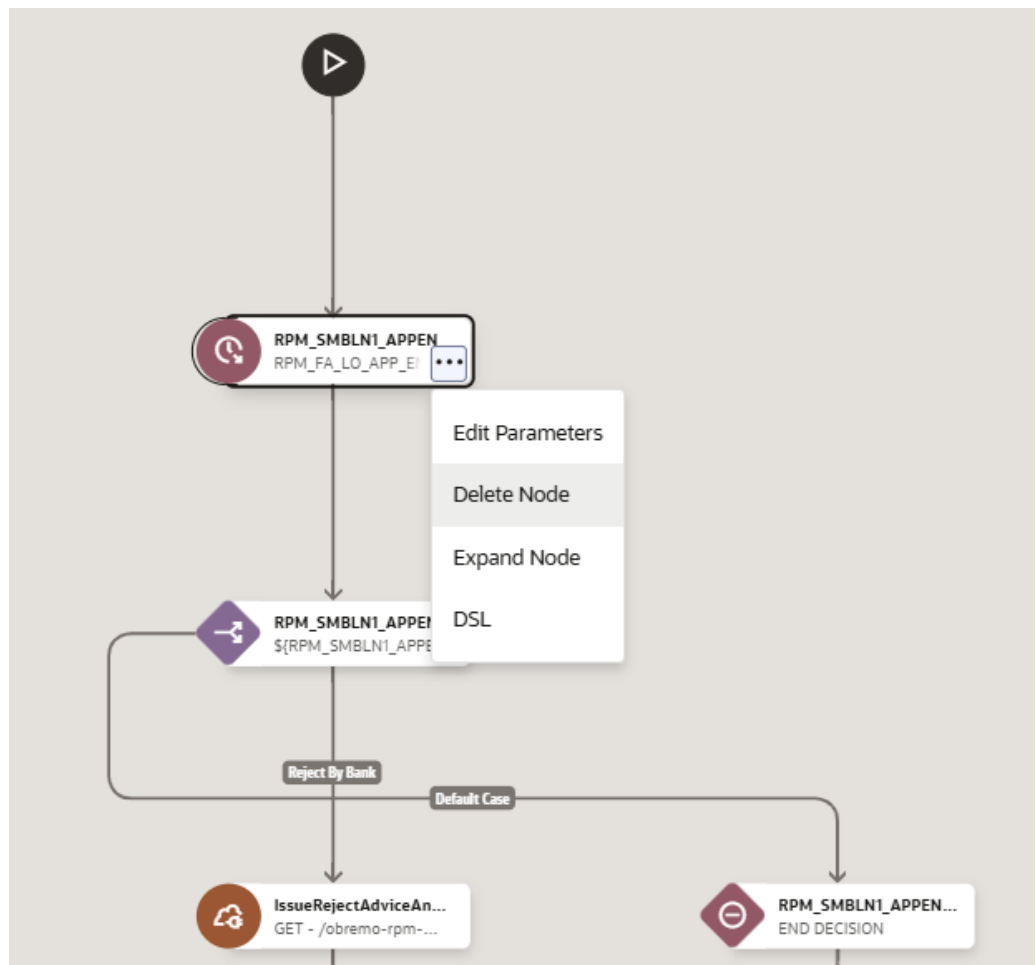
The **Expand Node** screen is displayed.



- 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.

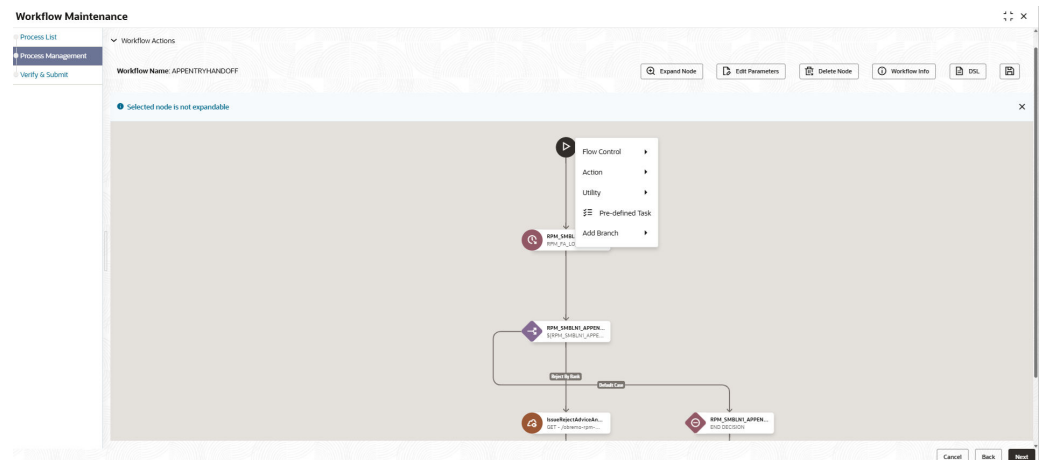
**Figure 1-18 Delete Node**



### Adding a Task

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

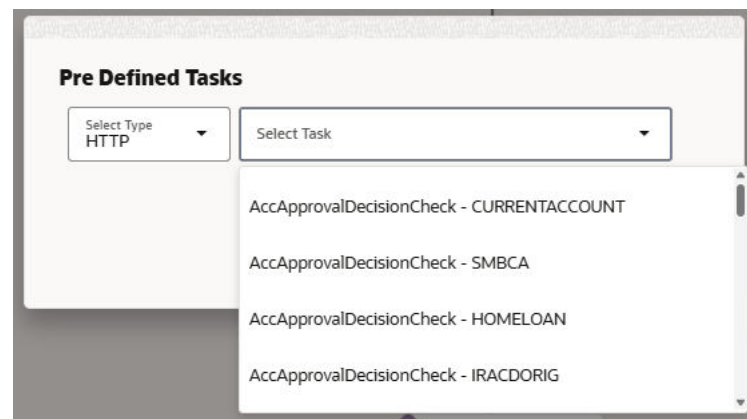
**Figure 1-19 Adding a Task**



- 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 1-20 Pre Defined Tasks**



- c. On **Pre-Defined Tasks** screen, specify the fields.  
For more information, refer to field and description table.

**Table 1-3 Pre Defined Tasks**

| Field              | Description                              |
|--------------------|--|
| <b>Select Type</b> | Select the type from the drop-down list. |
| <b>Select Task</b> | 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 1-21 Task Parameters**

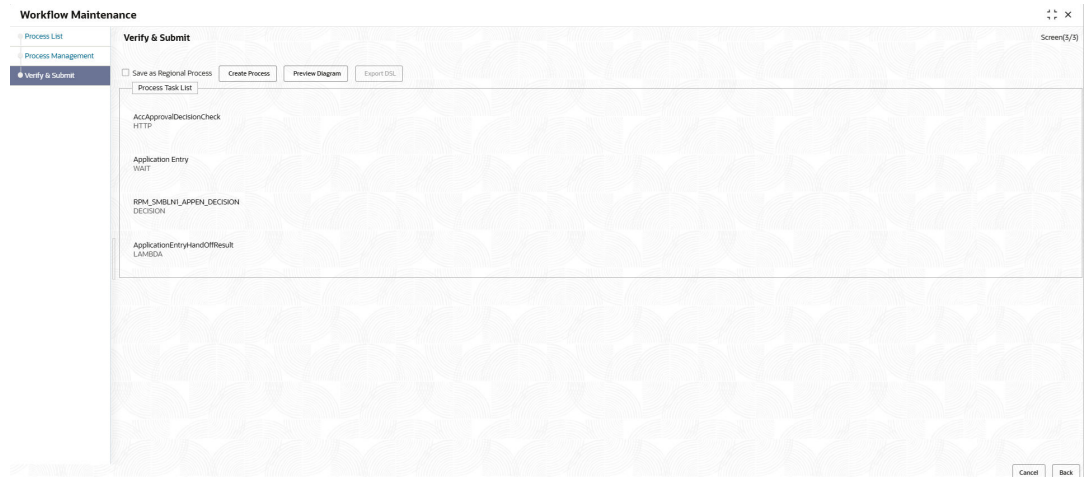
5. Click **Save and Insert** to add the task to the workflow or **Save** to save the task for future use after completing the necessary information.
6. Perform one of the following action on the **Process Management** screen.
  - Click **Next** to navigate to the next screen after modifying the stages.
  - 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 1-22 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  | Functional Activity Codes       | Action               | Description                |
|--------------|---------------------------------|----------------------|----------------------------|
| <b>Tasks</b> | CMC_FA_SUBMENU_1_Awaiting       | Awaiting             | Awaiting Confirmation Menu |
| <b>Tasks</b> | CMC_FA_MENU_Tasks               | Menu                 | Task Menu                  |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_Completed      | Completed            | Completed Task Menu        |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_FreeTasks      | FreeTasks            | Free Task Menu             |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_HoldTasks      | HoldTasks            | Hold Task Menu             |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_MyTasks        | MyTasks              | My Task Menu               |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_SEARCH         | Search               | Task Search                |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_Supervisor     | Supervisor           | Supervisor Task Menu       |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_WORKFLOW_MAINT | Workflow Maintenance | Workflow Maintenance       |
| <b>Tasks</b> | CMC_FA_CONFIGPROP               | Configprop           | Configprop Task            |
| <b>Tasks</b> | CMC_FA_SUBMENU_1_Subprocess     | Subprocess           | Subprocess Task Menu       |

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