

Oracle® Banking Corporate Lending Process Management Tasks Menu User Guide



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Preface

This topic contains following sub-topics:

- [Introduction](#)
- [Audience](#)
- [Acronyms and Abbreviations](#)
- [List of Topics](#)
- [Related Documents](#)

Introduction

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

Audience

This document is intended for the following audience:

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

Acronyms and Abbreviations

You may find the following acronyms/abbreviations in this manual.

Table 1 Acronyms and Abbreviations

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

List of Topics

Topics	Description
Tasks Menu	This topic provides the information about Task menu. Based on the user role, the sub menus can be accessed by the user
Business Process Maintenance	This topic provides the information about Business Process Maintenance menu allows you to create Workflows

Related Documents

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

- *Oracle Banking Corporate Lending Process Management Bilateral Loans User Guide*
- *Oracle Banking Corporate Lending Process Management Loan Syndication User Guide*
- *Oracle Banking Corporate Lending Process Management Configuration User Guide*

1

Tasks Menu

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

This topic contains following sub-topic.

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

1.1 Awaiting Customer Clarification

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

The task list displays the following details of the task.

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

- Branch
- Customer Number
- Amount

Figure 1-1 Awaiting Customer Clarification

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Customer Number	Amount
<input type="checkbox"/> Edit	high	Savings Account Origin...	000SAVNEW0006137	000APP00014292	Application Enrichment	20-03-26	000	006096	

1.2 Completed Tasks

Use **Completed Tasks** menu to display the tasks which has been recently completed a stage in a process by the current user. This menu does not display completed tasks of all the stages but displays only the latest stage.

The task list displays the following details of the task.

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

Following actions can be performed on the Completed Tasks menu:

- **Flow Diagram - Completed Tasks** menu enables you to view the process flow of the selected task and you can find the stages completed by the selected task and the current stage highlighted in the process flow.
- **Refresh** - Click **Refresh** to refresh the task list.

Figure 1-2 Completed Tasks

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	
<input checked="" type="checkbox"/>	H	MANUALRECON	004271119REC5518	004271119REC5518	Master Update Retry	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5533	004271119REC5533	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5383	004271119REC5383	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC5380	004271119REC5380	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Authorization	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004250321PAY11703	004250321PAY11703	Processing	19-11-27
<input type="checkbox"/>	H	MANUALRECON	004271119REC4373	004271119REC4373	Authorization	
<input type="checkbox"/>	H	MANUALRECON	004271119REC4336	004271119REC4336	Authorization	
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5396	004190221INV5396	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5390	004190221INV5390	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004190221INV5389	004190221INV5389	Authorization	19-11-27
<input type="checkbox"/>	H	INSTRUMENT	004180221INV5388	004180221INV5388	Authorization	19-11-27

1.3 Free Tasks

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

The task list displays the following details of the task.

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

Following action can be performed on the Free Tasks menu:

- **Acquire & Edit** - Click **Acquire & Edit** to acquire the task and edit directly from free tasks menu.
- **Acquire** - Select the task and click **Acquire** to edit the task later from **My Task** menu.
- **Flow Diagram - Free Tasks** menu enables user to view the process flow of the selected task and also user can find the stages completed by the selected task and the current stage highlighted in the process flow.
- Refresh - Click **Refresh** to refresh the task list.

Figure 1-3 Free Tasks

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20220	004240421INV20220	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20218	004240421INV20218	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20216	004240421INV20216	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20214	004240421INV20214	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20212	004240421INV20212	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20210	004240421INV20210	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20208	004240421INV20208	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20206	004240421INV20206	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20204	004240421INV20204	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20202	004240421INV20202	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20200	004240421INV20200	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20198	004240421INV20198	Authorization	19-11-27
<input type="checkbox"/> Acquire & Edit	H	INSTRUMENT	004240421INV20196	004240421INV20196	Authorization	19-11-27

1.4 Hold Tasks

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

The task list displays the following details of the task.

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

Following action can be performed on the Hold Tasks menu:

- **Resume** - Select the task and click Resume to move the task to **My Tasks** menu and edit.
- **Flow Diagram - Hold Tasks** menu enables you to view the process flow of the selected task and also you can find the stages completed by the selected task and the current stage highlighted in the process flow.
- **Refresh** - Click **Refresh** to refresh the task list.

Figure 1-4 Hold Tasks

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
H	INSTRUMENT	004211220PAY3683	004211220PAY3683	Authorization	19-11-27

1.5 My Tasks

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

The task list displays the following details of the task.

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

Following action can be performed on the **My Tasks** menu:

- **Edit** - Click **Edit** to edit the selected task.
- **Release** - Click **Release** to release the selected task from **My Tasks** to **Free Tasks** menu.
- **Refresh** - Click **Refresh** to refresh the task list.
- **Flow Diagram - My Tasks** menu enables you to view the process flow of the selected task and also you can find the stages completed by the selected task and the current stage highlighted in the process flow.
- **Delegate** - Click **Delegate** to assign the acquired task to any valid user for processing within the group.
- **Escalate** - Task is assigned to Supervisor

Figure 1-5 My Tasks

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20030	004230421INV20030	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004230421INV20029	004230421INV20029	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN185	004220421CN185	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004220421CN184	004220421CN184	Authorization	19-11-27
<input type="checkbox"/> Edit	H	CMS	004140421CW287	004140421CW287	Authorization	
<input type="checkbox"/> Edit	H	INSTRUMENT	004090421INV11977	004090421INV11977	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004080421INV11968	004080421INV11968	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11956	004070421INV11956	Authorization	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11953	004070421INV11953	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11949	004070421INV11949	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11946	004070421INV11946	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004070421INV11945	004070421INV11945	Processing	19-11-27
<input type="checkbox"/> Edit	H	INSTRUMENT	004060421INV11913	004060421INV11913	Authorization	19-11-27

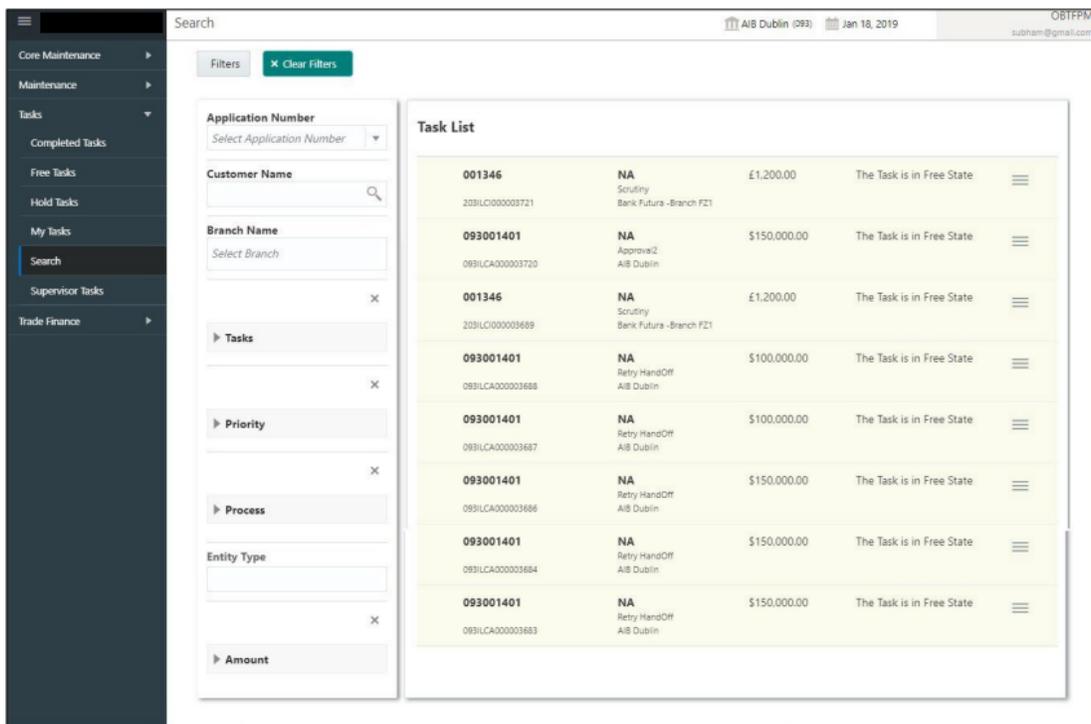
1.6 Search

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

The task list displays the following details of the task.

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

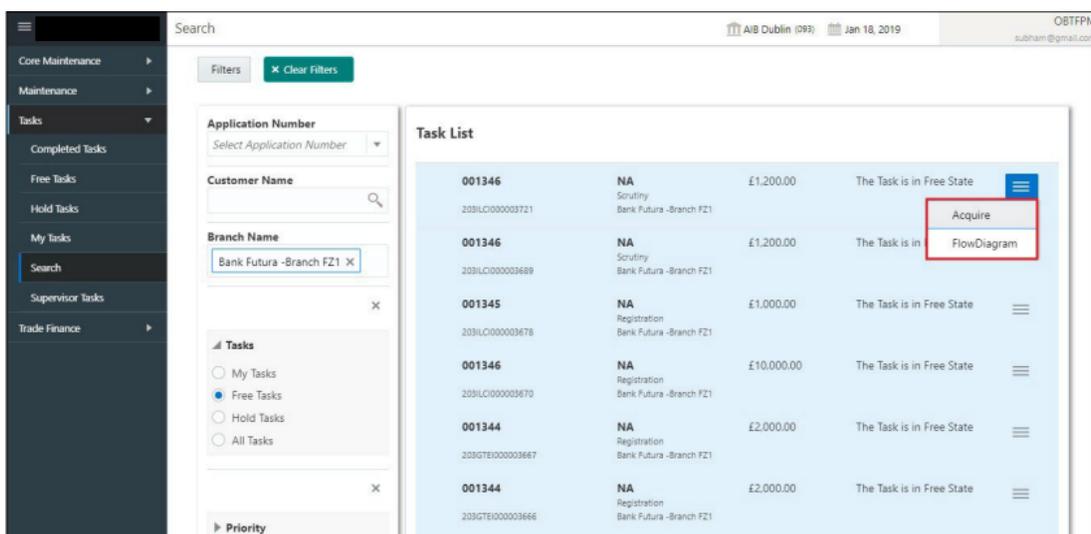
Figure 1-6 Search



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

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

Figure 1-7 Search Task



1.7 Supervisor Tasks

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

The task list displays the following details of the task.

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

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

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

Figure 1-8 Supervisor Tasks

Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
<input checked="" type="checkbox"/>	M Import Documentary C...	PK2IDCB000004721	PK2IDCB000004721	DataEnrichment	21-04-23
<input type="checkbox"/>	M Export Documentary Co...	PK2EDCU000004543	PK2EDCU000004543	DataEnrichment	21-04-12
<input type="checkbox"/>	M Import Documentary C...	PK2IDCB000004704	PK2IDCB000004704	Registration	21-04-20
<input type="checkbox"/>	M Import Documentary C...	PK2IDCB000004703	PK2IDCB000004703	Registration	21-04-20
<input type="checkbox"/>	M Guarantee Claim Lodging	PK2GTFC000004683	PK2GTFC000004683	Scrutiny	21-04-19
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004642	PK2ILCU000004642	Scrutiny	21-04-16
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004604	PK2ILCU000004604	Scrutiny	21-04-15
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004603	PK2ILCU000004603	Scrutiny	21-04-15
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004601	PK2ILCU000004601	Scrutiny	21-04-15
<input type="checkbox"/>	M Import LC Drawing	PK2ILCD000004561	PK2ILCD000004561	Scrutiny	21-04-13
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004483	PK2ILCU000004483	Scrutiny	21-04-08
<input type="checkbox"/>	M Import LC Drawing Upd...	PK2ILCU000004439	PK2ILCU000004439	Scrutiny	21-04-07
<input type="checkbox"/>	M Import Documentary C...	PK2IDCU000004310	PK2IDCU000004310	DataEnrichment	21-04-05

2

Business Process Maintenance

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

Basically, it comprises of three screens.

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

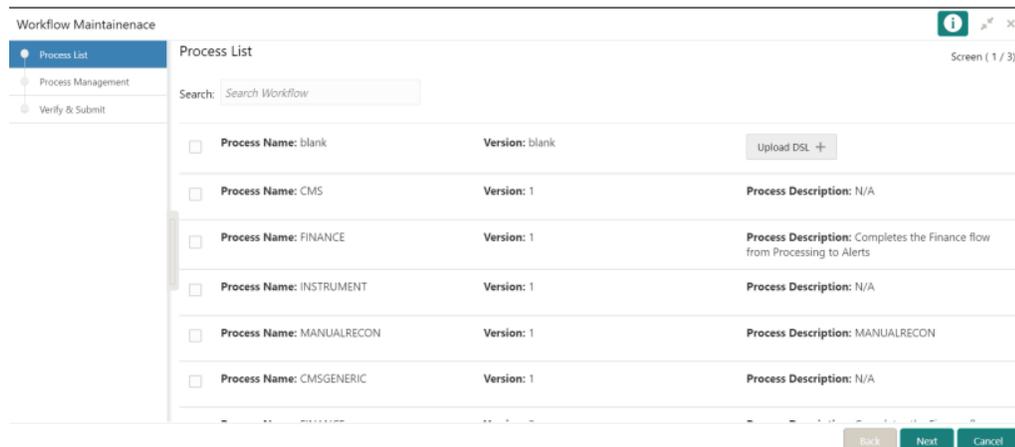
2.1 Process List Screen

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

Following actions can be performed on the **Process List** screen:

- **Search** – For searching any of the existing workflows/Process.
- **Upload DSL** – Can be used to upload workflow in JSON format.
- **Next** – After selecting one process, click **Next** to navigate to the **Process Management** screen
- **Cancel** – To exit from the **Business Process Maintenance** menu.

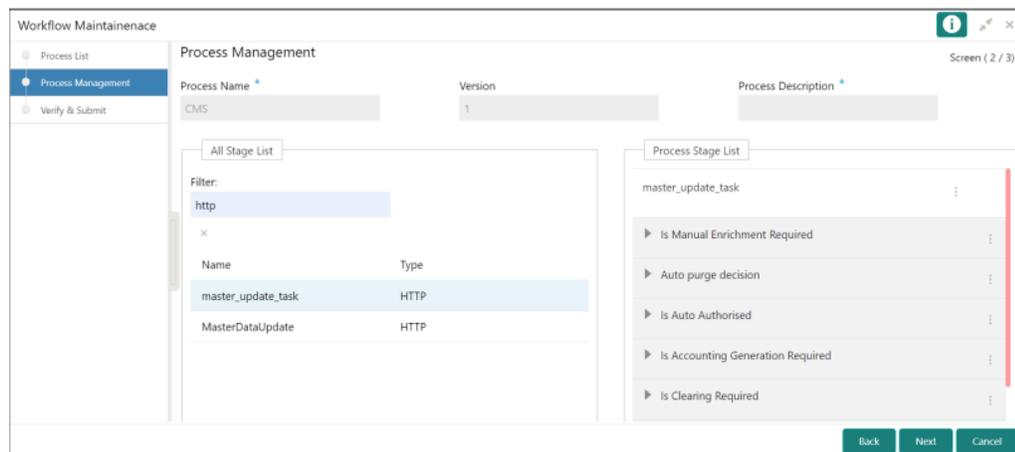
Figure 2-1 Process List



2.2 Process Management Screen

Use **Process Management** screen to view the list of the stages under the process, which was selected from the **Process List** screen, on the right under the heading **Process Stage List**. In addition, all stages are listed in table on the left under the heading **All Stage List**.

Figure 2-2 Process Management Screen



Drag and Drop Functionality:

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

Creating a New Stage

- Click **Create Stage** on the **Process Management** screen to create new stage.

The **Create Task** screen is displayed. The type of the stage can be changed in the core properties.

Figure 2-3 Create Tasks

Input Param	Values
FUNCTIONAL_CODE	
TASK_OUTCOMES	
APPLICATION_NO	\$(workflow.input.applicationN...
processRefNo	\$(workflow.input.processRefN...
lifecycleCode	

Core Properties	Core Values
name	
taskReferenceName	
type	WAIT
startDelay	0
optional	false
asyncComplete	false

Edit/Delete Functionality

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

Figure 2-4 Edit-Delete functionality

Workflow Maintenance

Process Management

Process Name: GTAAMD2 | Version: 1 | Process Description: Guarantee Advise Amendment Workflo

All Stage List

Name	Type
SubmissionCheck	DECISION
ProcessingData	LAMBDA
DataEnrichment	WAIT
EnrichmentDecision	DECISION
SubmissionCheck	DECISION

Process Stage List

- SubmissionCheck
- ProcessingData (Selected)
- DataEnrichment
- EnrichmentDecision

Context Menu: Edit, Delete

Figure 2-5 Modify Tasks

The screenshot shows the 'Modify Task' interface with two main sections: 'Input Parameters' and 'Stage Properties'.

Input Parameters:

Input Param	Values
DataIn	\${AutoRegistrationViaOnlineTr...}
RegistrationIn	\${Registration.output}
workflowIn	\${workflow.input}
DataEnrichmentIn	\${DataEnrichment.output}
scriptExpression	if (\$.DataEnrichmentIn != null)...

Stage Properties:

Core Properties	Core Values
name	ProcessingData
taskReferenceName	ProcessingData
type	LAMBDA
startDelay	0
optional	false
asyncComplete	false

At the bottom right, there is a 'Modify task' label and two buttons: 'Done' and 'Cancel'.

Following actions can be performed on the Process Management screen:

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

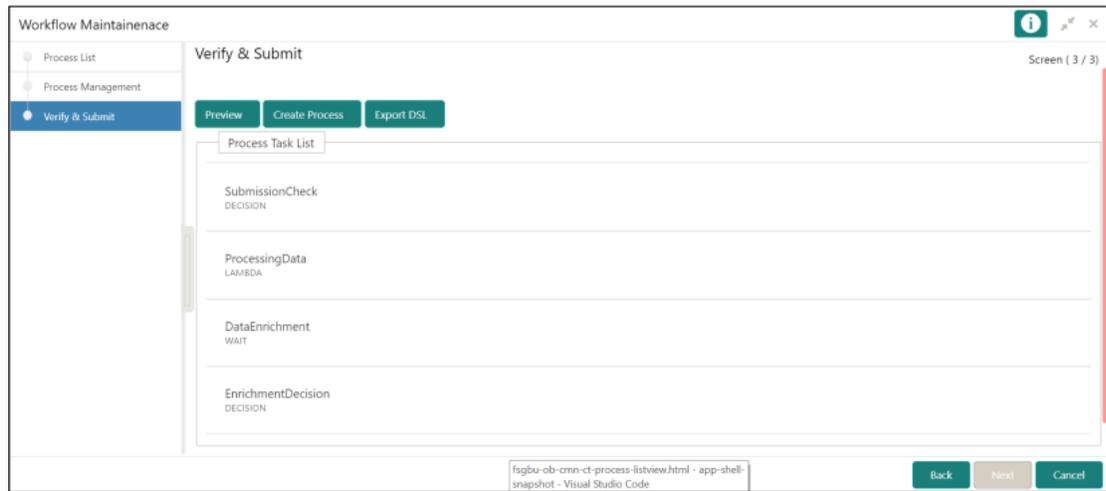
2.3 Verify and Submit Screen

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

Following actions can be performed on the Process Management screen:

- **Preview** - Click **Preview** to view the flow diagram of the selected process.
- **Create Process** - Used to create new process. If an existing process is modified, a new process with updated version would appear on the process list screen or else a new process would appear.
- **Export DSL** - To **Export DSL** into a file in JSON format.
- **Back** – Click **Back** to navigate to the previous screen.
- **Cancel** – To exit from the **Business Process Maintenance** menu.

Figure 2-6 Verify and Submit



3

Error Codes and Messages

Use this topic to view the error codes and messages

Table 3-1 Error code and Messages

Error code	Messages
GCS-SAV-001	Record already exists
ORCH-0001	The system is unable to complete the task. Contact your supervisor.
ORCH-0002	Error in retrieving subordinates list
ORCH-1001	Invalid operator is used in query criteria.
ORCH-1002	Found invalid field/s in query criteria. It allows only following fields (case sensitive):
ORCH-1003	Header or both headers are missing the request.
ORCH-1004	Invalid User/ branch in request.
ORCH-1005	Invalid query task type. Please use one of the given types
ORCH-1006	Invalid task Id, please pass a valid task ID
ORCH-1007	TaskId should not be null, please pass a task Id in the body
ORCH-1008	In the body transaction model should not be empty
ORCH-1009	Current User cannot update the given task
ORCH-1010	Task which is completed cannot be updated.
ORCH-1011	Task must be in ACQUIRED state for update
ORCH-1012	Invalid Supervisor/ branch in request.
file_error	Please upload json file only
select_error	Please select once process

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