

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.

Documentation Accessibility

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Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to

build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

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

- *Oracle Banking Getting Started User Guide*

Conventions

The following text conventions are used in this document:

| Convention | Meaning |
|-----------------|--|
| boldface | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| <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 . |

Table (Cont.) Basic Actions

| Action | Description |
|-----------------------------|---|
| Collapse All | Used to hide the details in the sections. This button is displayed, once the user click Compare . |
| 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; border-bottom: 2px solid #0070C0; padding: 5px; margin-left: 20px;"> <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 Pending Tasks](#)
- [My Tasks](#)
- [Search](#)
- [Servicing Transaction Inquiry](#)
- [Branch Servicing Pending Transactions View](#)
- [Supervisor Tasks](#)
- [Business Process Maintenance](#)

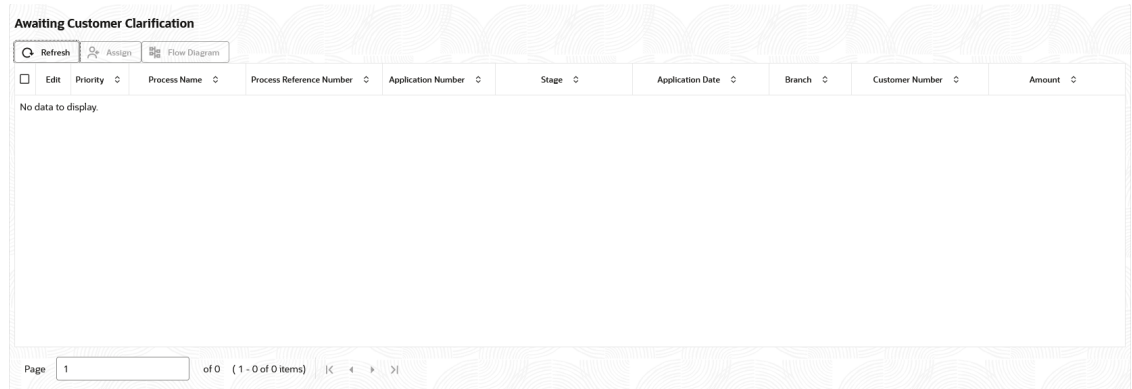
This topic describes the systematic instruction to create the workflows.

1.1 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

| <input type="checkbox"/> | Edit | 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**
- **Reference Number**
- **Customer Number**
- **Amount**

Figure 1-2 Completed Tasks

| Priority | Process Name | Process Reference Number | Application Number | Stage | Application Date | Branch | Reference Number | Customer Number | Amount |
|----------|-------------------------|--------------------------|---------------------|------------|------------------|--------|------------------|-----------------|--------|
| Medium | Create TD Amount Blo... | DSRREF1833500007913 | DSRAPP1833500007913 | Initiation | 18-12-01 | KIM | 010337 | 000004192 | E12.00 |
| Medium | Create TD Amount Blo... | DSRREF1833500007913 | DSRAPP1833500007913 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007912 | DSRAPP1833500007912 | Initiation | 18-12-01 | KIM | KV1ISA001 | 000004192 | E10.00 |
| Medium | Create TD Amount Blo... | DSRREF1833500007912 | DSRAPP1833500007912 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007899 | DSRAPP1833500007899 | Initiation | 18-12-01 | KIM | 010337 | 000004192 | E10.00 |
| Medium | Create TD Amount Blo... | DSRREF1833500007899 | DSRAPP1833500007899 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007836 | DSRAPP1833500007836 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007835 | DSRAPP1833500007835 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007834 | DSRAPP1833500007834 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007833 | DSRAPP1833500007833 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007832 | DSRAPP1833500007832 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007831 | DSRAPP1833500007831 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007829 | DSRAPP1833500007829 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007828 | DSRAPP1833500007828 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007827 | DSRAPP1833500007827 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007826 | DSRAPP1833500007826 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007824 | DSRAPP1833500007824 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007823 | DSRAPP1833500007823 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007822 | DSRAPP1833500007822 | Initiation | 18-12-01 | KIM | | | |
| Medium | Create TD Amount Blo... | DSRREF1833500007821 | DSRAPP1833500007821 | Initiation | 18-12-01 | KIM | | | |

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

| 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 |

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

Figure 1-4 Free Tasks

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

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.

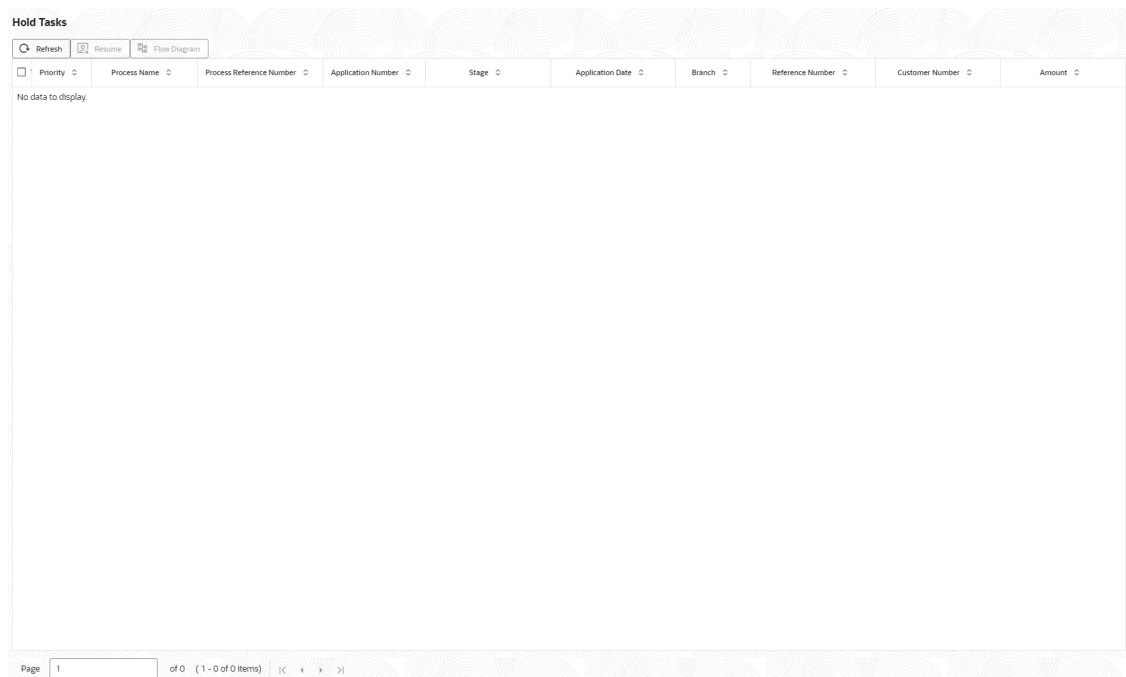
1.4 Hold Tasks

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

Figure 1-5 Hold Tasks



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

1. **Resume** - Select the task and click **Resume** button to move the task to **My Tasks** menu and then edit.
2. **Flow Diagram** - Hold Tasks menu enables the user to view the process flow of the selected task, find the stages completed and the current stage highlighted in the process flow.

3. **Refresh** - Click **Refresh** button to refresh the task list.

1.5 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

| <input type="checkbox"/> | Edit | Process Name | Service Reference | Stage | Status | Branch | Reference Number | Customer Number | Amount | User ID |
|--------------------------|------|---------------------------------|---------------------|------------|-------------|--------|------------------|-----------------|--------|-----------|
| <input type="checkbox"/> | Edit | Modify Sweep In to Account | CSRAPP1809200082325 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Close Scheduled Transfer | CSRAPP1809200082272 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Joint holder Details Update | CSRAPP1809200082256 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Deposit Top Up | DSRAPP1809200082028 | Initiation | In_progress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Deposit Top Up | DSRAPP1809200081791 | Initiation | In_progress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Address Update | CSRAPP1809200081789 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Deposit Top Up | DSRAPP1809200081788 | Initiation | In_progress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Deposit Payout Modification | DSRAPP1809200081786 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | TD Account Modification Process | DSRAPP1809200081784 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | TD Account Modification Process | DSRAPP1809200081783 | Initiation | Inprogress | HAR | | | | CASADEMOI |
| <input type="checkbox"/> | Edit | Deposit Top Up | DSRAPP1809200081782 | Initiation | In_progress | HAR | | | | CASADEMOI |

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

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

1.6 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

| □ Edit | Priority | Process Name | Process Reference Number | Application Number | Stage | Application Date | Branch | Reference Number | Customer Number | Amount |
|--------|----------|-------------------------|--------------------------|---------------------|------------------|------------------|--------|------------------|-----------------|--------|
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007915 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Deposit Account Ope... | DSRREF1833500007914 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007830 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007825 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007804 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007803 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007802 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007791 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007790 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007789 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007788 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007780 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007711 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007709 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007703 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007702 | DSRAPP1833500007... | Initiation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007649 | DSRAPP1833500007... | Process Creation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007648 | DSRAPP1833500007... | Process Creation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007647 | DSRAPP1833500007... | Process Creation | 18-12-01 | KIM | | | |
| □ Edit | Medium | Create TD Amount Blo... | DSRREF1833500007646 | DSRAPP1833500007... | Process Creation | 18-12-01 | KIM | | | |

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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.

1.7 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 search interface with a left-hand filter panel and a main task list area. The filter panel includes fields for Application Number (a dropdown), Customer Id, Party Id, and Branch Name (a dropdown). Below these are expandable filter sections for Processes/Tasks, Priority, Process, and Amount, each with a close button (X). The main area is titled 'Task List' and currently shows 'No items to display'. A pagination bar at the bottom of the main area indicates 'Page 1 of 0 (1 - 0 of 0 items)' with navigation arrows. At the top of the search panel, there are 'Filters' and 'Clear Filters' buttons. A 'Fetch' button is located at the bottom left of the main area.

1.8 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

2111 results

| 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 |

1.9 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
BO1

Branch Name
Test Branch 01

Search User

3687 Transactions Refresh


| Process Name | Reference Number | Stage | Status | User |
|---------------------------------|---------------------|---------------|-------------|------------|
| Online Account Sweep In | CSRAPP1854200072721 | Initiation | In Progress | PPKCHECKER |
| Online Account Sweep In | CSRAPP1854200072714 | Handoff Retry | Failed | PPKCHECKER |
| TD Account Modification Process | DSRAPP1854200072697 | Initiation | In Progress | PPKCHECKER |
| Joint Holder Maintenance | CSRAPP1854200072681 | Initiation | In Progress | PAVAN001 |
| Joint Holder Maintenance | CSRAPP1854200072680 | Initiation | In Progress | PAVAN001 |
| Stop Cheque Payment | CSRAPP1854200072626 | Initiation | In Progress | STAFFUSER1 |
| Account Preferences | CSRAPP1854200072621 | Initiation | In Progress | STAFFUSER1 |
| Account Preferences | CSRAPP1854200072615 | Initiation | In Progress | STAFFUSER1 |
| Account Address Update | CSRAPP1854200072611 | Initiation | In Progress | PPKCHECKER |
| Account Garnishment | CSRAPP1854200072604 | Initiation | In Progress | PPKCHECKER |

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 |
|-------------------------|---|
| Branch | Display the user logged in branch and the pending transactions displayed for this branch. |
| Branch Name | Display the branch name. |
| Search User | Select the user id to filter the pending branch servicing transactions for a specific user. The LOV fetch all open and authorized user. The LOV screen, user can search the user by user name and User ID . |
| Refresh | Click on this button to refresh the details. |
| Process Name | Display the process name for the pending transactions. |
| Reference Number | Display the related Reference Number for the pending transactions. |
| Stage | Display the current stage of pending transaction. |
| Status | Display the current status of pending transaction. |
| User | Display the user ID with whom the transaction is pending. <div data-bbox="925 1092 1055 1134" data-label="Section-Header"> Note:</div> <div data-bbox="974 1155 1412 1249" data-label="Text"> <p>If the transaction is not assigned to any user, the last actioned user ID should be displayed for the pending transactions.</p> </div> |

Validate pending branch servicing transactions as part of the EOD process

During the end-of-day (EOD) process, the system verifies if any system about the end of day if any pending branch servicing transactions are still incomplete. The bank can configure which branch servicing transactions need to be completed on the same day. Transactions not configure for end-of-day validation can continue the next day, while processing the transactions in the next day system gives a information message to the user that the transaction was initiated on the previous day.

1.10 Supervisor Tasks

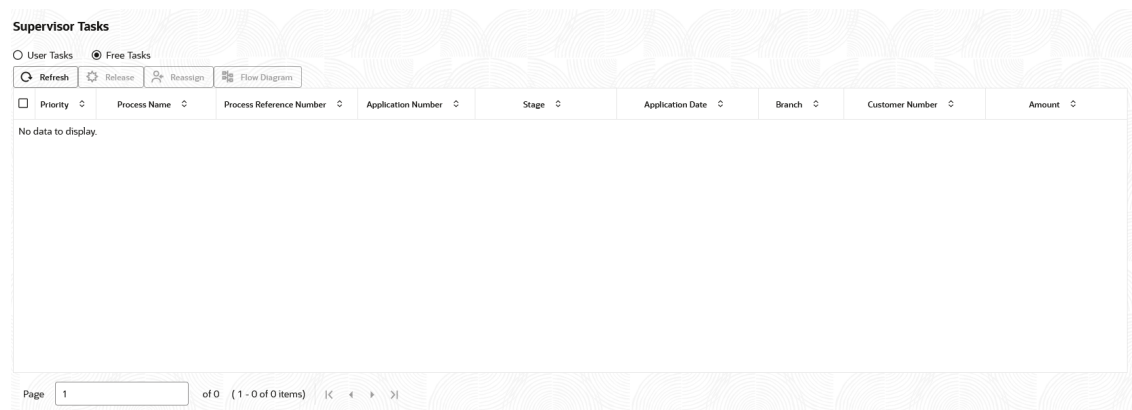
Supervisor Tasks menu displays the 'User Tasks' or 'Free Tasks' based upon the option that is selected.

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.

1.11 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.

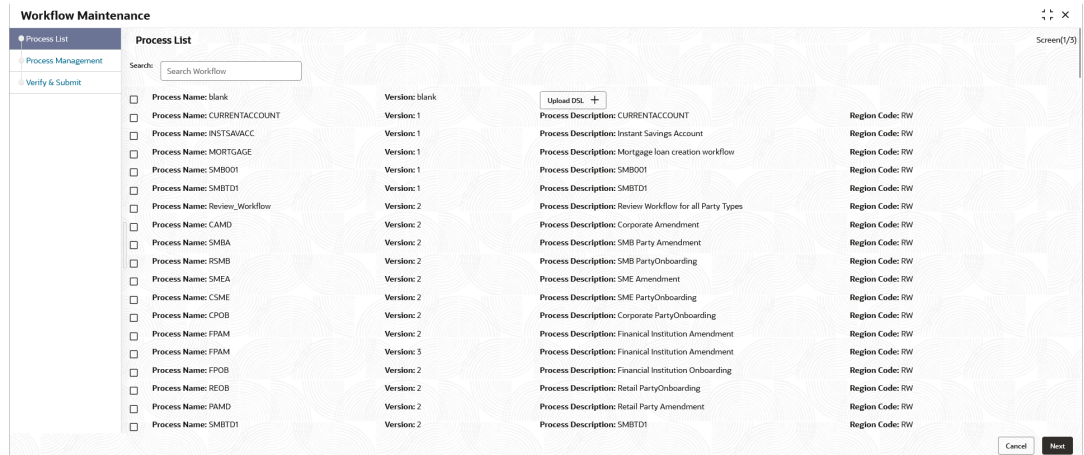
Process List

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 1-13 Process List



2. 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.

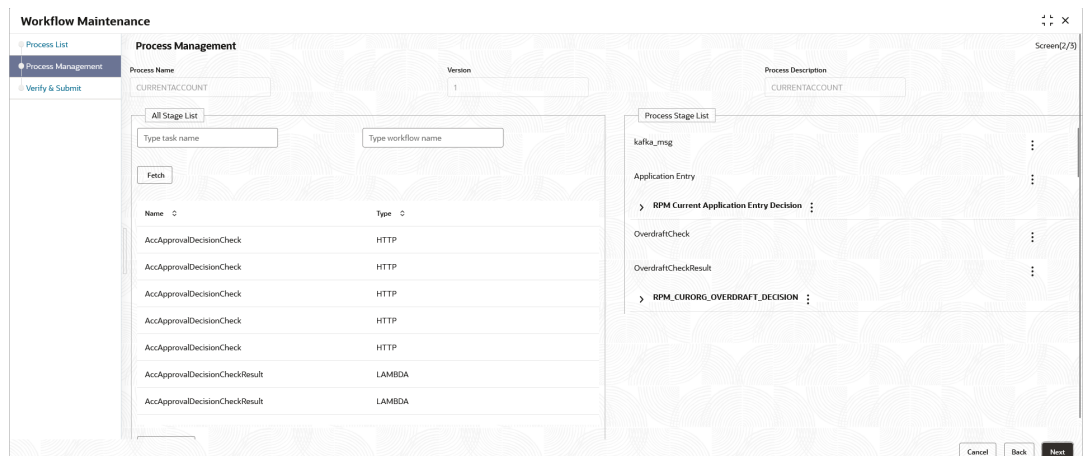
Process Management

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**.

3. Click **Next**.

The **Process Management** screen displays.

Figure 1-14 Process Management




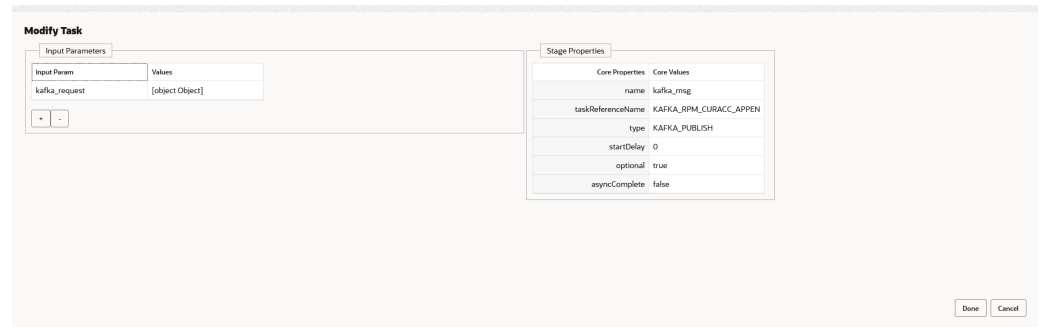

4. Drag and drop any stage from the **All Stage List** to the **Process Stage List** to add new stages in the process. The user can also perform the following actions in the **Process Management** screen:
 - a. Click  and select **Edit** to edit a stage in the **Process Stage List**.
The **Modify Task**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

Figure 1-15 Modify Task



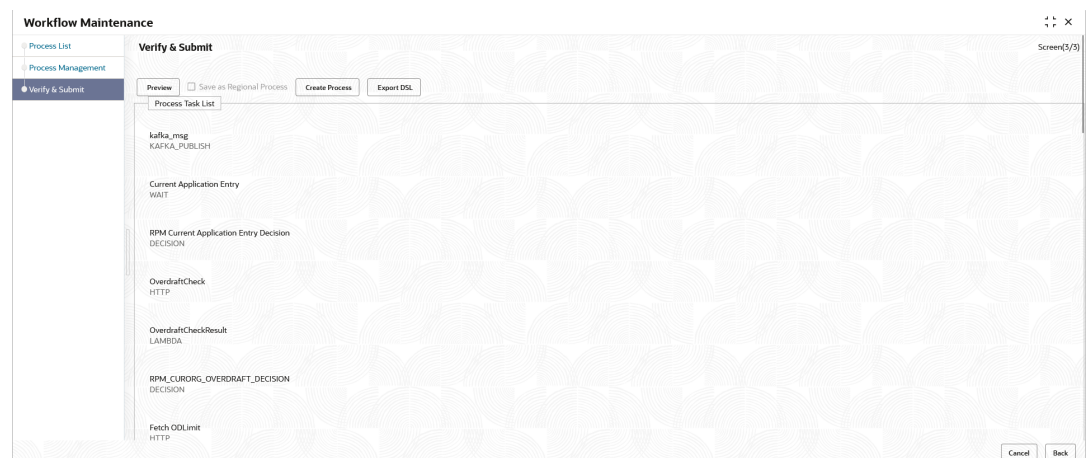
- b. Click  and select **Delete** to delete a stage from the **Process Stage List**.
5. Perform one of the following action on the **Process Management** screen.
 - Click **Next** to navigate to the next screen after modifying the stages.
 - Click **Back** to navigate to the previous screen.
 - Click **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 1-16 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 |

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 |
|-------------|---------------------------------|----------------------|----------------------------|
| Tasks | CMC_FA_SUBMENU_1_Awaiting | Awaiting | Awaiting Confirmation Menu |
| Tasks | CMC_FA_MENU_Tasks | Menu | Task Menu |
| Tasks | CMC_FA_SUBMENU_1_Completed | Completed | Completed Task Menu |
| Tasks | CMC_FA_SUBMENU_1_FreeTasks | FreeTasks | Free Task Menu |
| Tasks | CMC_FA_SUBMENU_1_HoldTasks | HoldTasks | Hold Task Menu |
| Tasks | CMC_FA_SUBMENU_1_MyTasks | MyTasks | My Task Menu |
| Tasks | CMC_FA_SUBMENU_1_SEARCH | Search | Task Search |
| Tasks | CMC_FA_SUBMENU_1_Supervisor | Supervisor | Supervisor Task Menu |
| Tasks | CMC_FA_SUBMENU_1_WORKFLOW_MAINT | Workflow Maintenance | Workflow Maintenance |
| Tasks | CMC_FA_CONFIGPROP | Configprop | Configprop Task |
| Tasks | CMC_FA_SUBMENU_1_Subprocess | Subprocess | Subprocess Task Menu |

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