

Dashboards User Guide

Oracle Banking Credit Facilities Process Management

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Oracle Banking Credit Facilities Process Management User Guide
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1 Welcome to Oracle Banking Credit Facilities Process Management

Welcome to the Oracle Banking Credit Facilities Process Management (OBCFPM) Dashboards User Manual. This manual provides an overview on the Dashboard widgets available in OBCFPM and guides you through the various features in Dashboards.

If you need any information, look out for the help icon.

This document helps you conveniently make use of Dashboards in OBCFPM

Overview of OBCFPM Dashboards

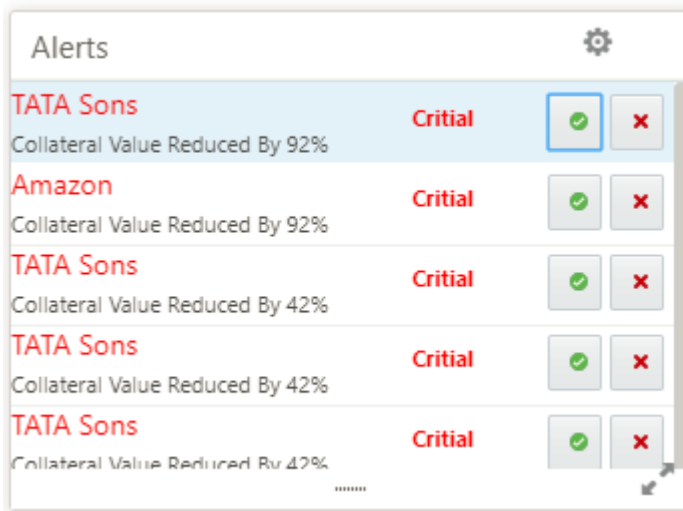
OBCFPM Dashboards will ease the trouble of looking for data or statistics in the system. Following six type of Dashboards created for specific purpose and explained in details in the coming sections.

- Alerts
- Collateral Due for Review
- Facility Due for Review
- Collateral Due for Review – by RM
- Facility Due for Review – by RM
- Pending Exceptions

2 Alerts

Alerts dashboard comes handy in reminding user on taking actions like review, substitution or covenants tracking. The user also has an option to dismiss the alert.

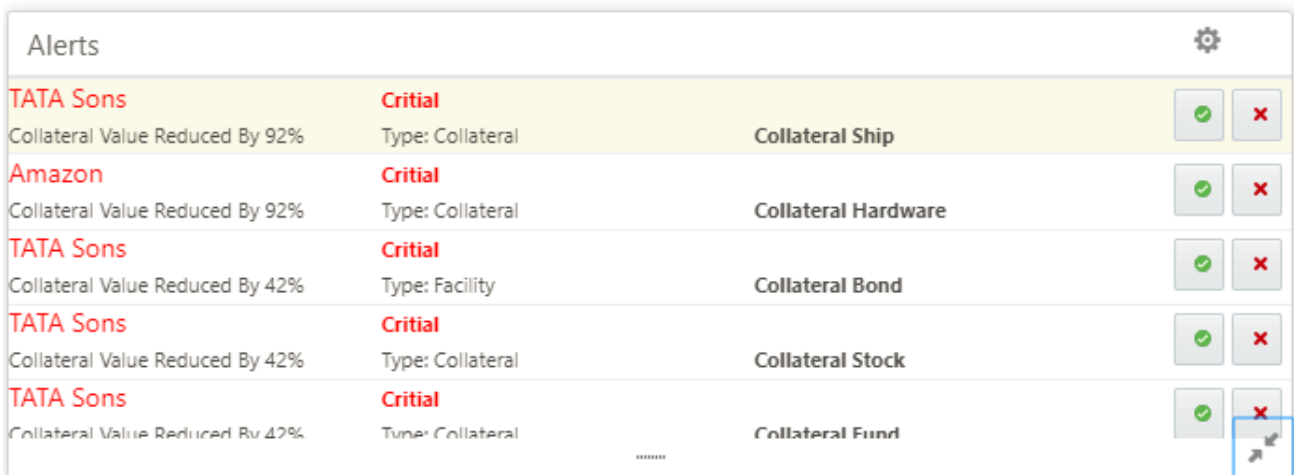
Short View:



The Short View of the Alerts dashboard shows a list of alerts in a compact format. Each alert entry includes the customer name, the alert description, the severity level, and two action buttons (a green checkmark and a red 'x'). The first alert for 'TATA Sons' is highlighted with a blue border.

Customer	Alert Description	Severity	Actions
TATA Sons	Collateral Value Reduced By 92%	Critical	<input checked="" type="checkbox"/> <input type="checkbox"/>
Amazon	Collateral Value Reduced By 92%	Critical	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	<input type="checkbox"/> <input type="checkbox"/>

Expanded View:



The Expanded View of the Alerts dashboard provides more detail for each alert. It includes the customer name, alert description, severity, type of collateral, and the collateral name. The first alert for 'TATA Sons' is highlighted with a yellow background, and the 'Dismiss' button (red 'x') is highlighted with a blue border.

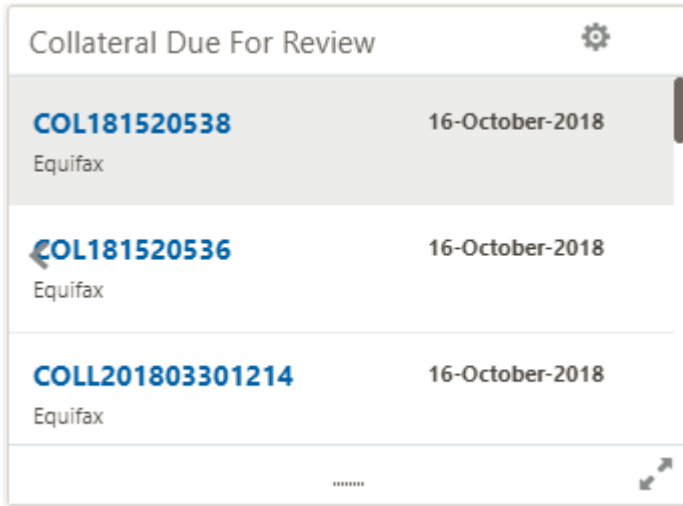
Customer	Alert Description	Severity	Type	Collateral	Actions
TATA Sons	Collateral Value Reduced By 92%	Critical	Type: Collateral	Collateral Ship	<input checked="" type="checkbox"/> <input type="checkbox"/>
Amazon	Collateral Value Reduced By 92%	Critical	Type: Collateral	Collateral Hardware	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	Type: Facility	Collateral Bond	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	Type: Collateral	Collateral Stock	<input type="checkbox"/> <input type="checkbox"/>
TATA Sons	Collateral Value Reduced By 42%	Critical	Type: Collateral	Collateral Fund	<input type="checkbox"/> <input type="checkbox"/>



Shorter view of Alerts dashboard will show the customer name followed by remarks, type, and criticality of alert.

Expanded view of Alerts dashboard will show in addition to the above set of fields, type of Collateral.

3 Collateral Due for Review

Collateral due for Review dashboard reminds user on collaterals that are about to expire or expired and pending for an action. The user also has an option to dismiss the alert.

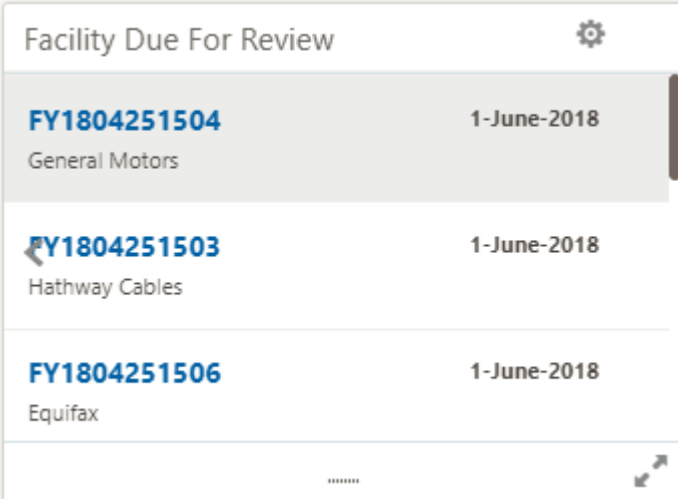




Collateral Due For Review 	
COL181520538 Equifax	16-October-2018
COL181520536 Equifax	16-October-2018
COLL201803301214 Equifax	16-October-2018
	

Collateral pending for Review dashboard will show the collateral code, customer name followed by review date.

4 Facility Due for Review

Collateral due for Review dashboard reminds user on collaterals that are about to expire or expired and pending for an action. The user also has an option to dismiss the alert.

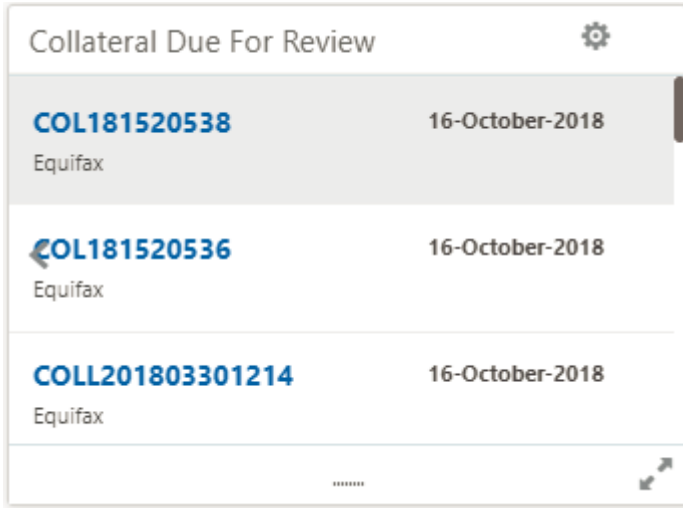




Facility Due For Review		
FY1804251504	1-June-2018	
General Motors		
FY1804251503	1-June-2018	
Hathway Cables		
FY1804251506	1-June-2018	
Equifax		
.....		

Facility pending for Review dashboard will show the Facility code, customer name followed by review date.

5 Collateral Due for Review – By Relationship Manager

Collateral due for Review for the logged in Relationship manager(RM) dashboard reminds the RM on collaterals that are about to expire or expired and pending for an action.

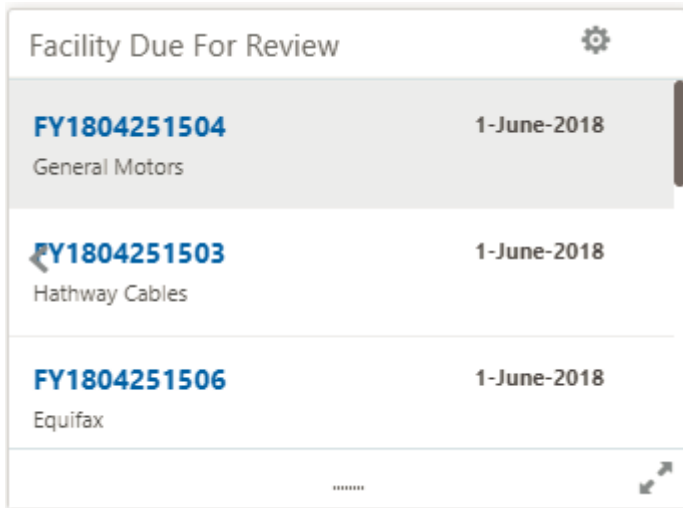




Collateral Due For Review 	
COL181520538 Equifax	16-October-2018
COL181520536 Equifax	16-October-2018
COLL201803301214 Equifax	16-October-2018
	

Collateral pending for Review – by RM dashboard will show the collateral code, customer name followed by review date.

6 Facility Due for Review – By Relationship Manager

Collateral due for Review – by Relationship Manager (RM) dashboard reminds RM on collaterals that are about to expire or expired and pending for an action.



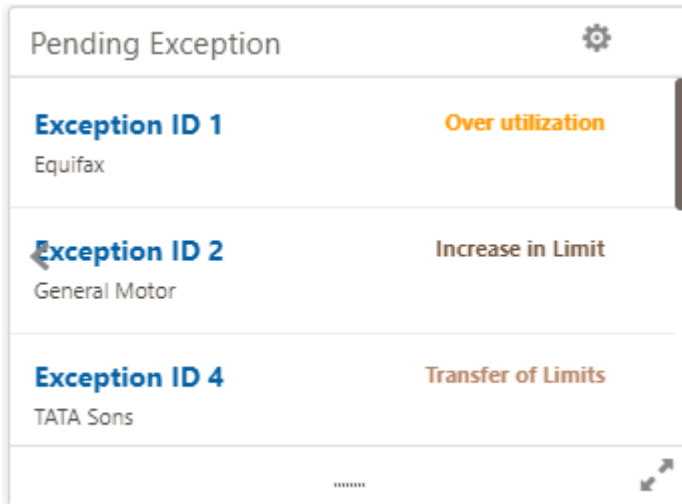
Facility Due For Review 	
FY1804251504 General Motors	1-June-2018
FY1804251503 Hathway Cables	1-June-2018
FY1804251506 Equifax	1-June-2018
.....	

Facility pending for Review – by RM dashboard will show the Facility code, customer name followed by review date.

7 Pending Credit Exception

Pending Credit Exception dashboard comes handy in reminding user on exceptions that are pending to be actioned.

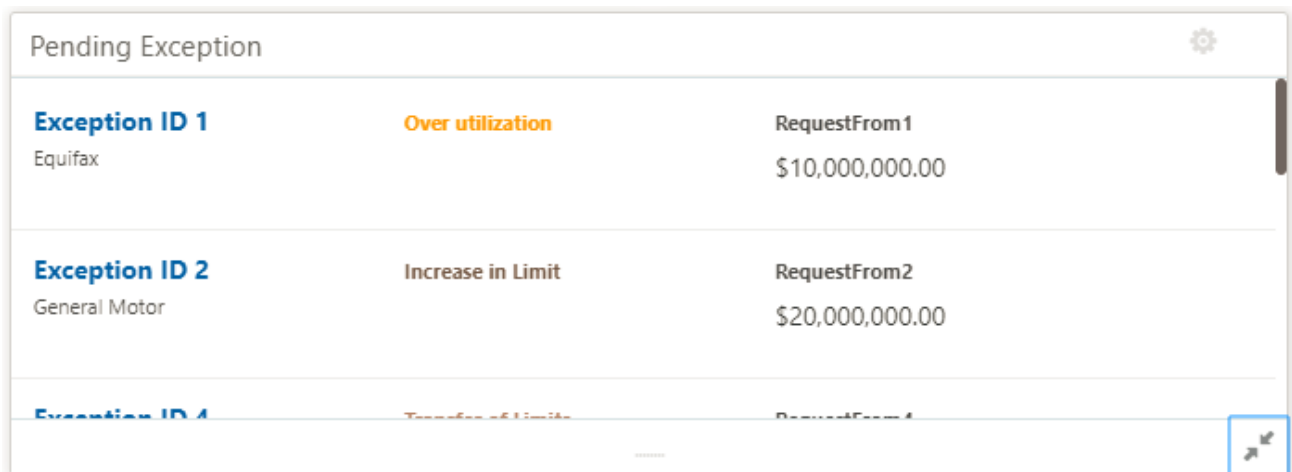
Short View:



The short view dashboard shows a list of pending credit exceptions. Each entry includes an Exception ID, the customer name, and the exception status. A settings gear icon is in the top right, and a scroll bar is on the right side.

Pending Exception	
Exception ID 1 Equifax	Over utilization
Exception ID 2 General Motor	Increase in Limit
Exception ID 4 TATA Sons	Transfer of Limits

Expanded View:



The expanded view dashboard shows the same list of pending credit exceptions but includes an additional column for the requested amount. A settings gear icon is in the top right, a scroll bar is on the right side, and a zoom-out icon is in the bottom right corner.

Pending Exception		
Exception ID 1 Equifax	Over utilization	RequestFrom1 \$10,000,000.00
Exception ID 2 General Motor	Increase in Limit	RequestFrom2 \$20,000,000.00
Exception ID 4 TATA Sons	Transfer of Limits	RequestFrom4 \$10,000,000.00

Shorter view of Pending Credit Exception dashboard will show the Exception Id, customer name followed by exception status.

Expanded view of Pending Credit Exception dashboard will show in addition to the above set of fields, requested from module and utilization amount.

8 Reference and Feedback

8.1 References

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

- Oracle Banking Getting Started User Guide
- Security Management System User Guide
- Common Core User Guide
- Process Maintenance Worklist User Guide
- Oracle Banking Credit Facilities Process Management Installation Guides

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