

User Manual

OBTFPM – Widgets

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Oracle Banking Trade Finance Process Management User Guide
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1 SLA Breach Detailed Widget

User can access SLA Breach widget from the Dashboard

Summary

As a User you can access SLA Breach widget from the Trade Mid Office (TMO) system Dashboard.

Description

User when he logs in to Tread Mid Office (TMO) Solution application with appropriate credentials, User will be able to see the Dashboard screen. User can see the SLA Breach widget on dashboard.

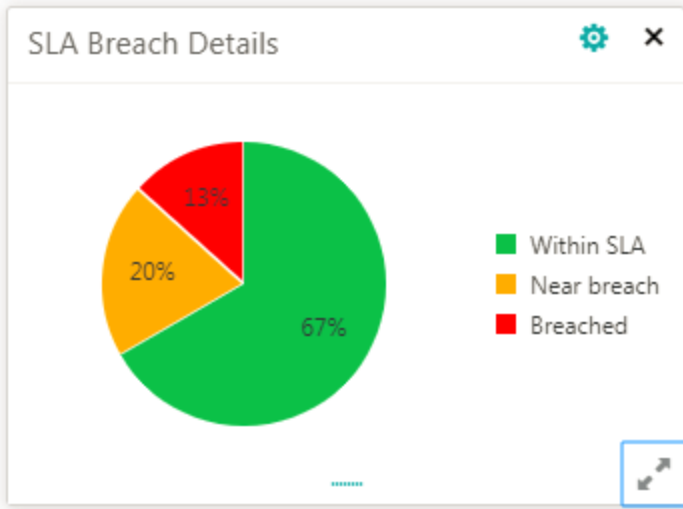
SLA Breach Widget Screen

Customer Name.	SLA Breached (Mins)	Priority	User Id	Process Reference Number	Process Name	Stage Name
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This widget should list the applications that have not been completed within the SLA time. This report can be directly generated from menu or from within SLA status in dashboard.

Logic: SLA Breach Time = (present time - Start time) - SLA maintained

SLA Breach Details			
Customer Name	SLA Breached(mins)	Prior	
NA	16397	H	KEERTIV01
HSBC BANK	19590	M	SHUBHAM
WALL MART	16418		SHUBHAM
EMR & CO	19703	M	GOPINATH01



2 Priority Summary Widget

As a user I want to access Priority Summary widget from the Dashboard

Summary

An User can access Priority Summary widget from the Trade Mid Office (TMO) system Dashboard.

Description

As a user when you log in to Trade Mid Office (TMO) System with appropriate credentials, you should be able to see the Dashboard screen. User can also see the Priority Summary widget on dashboard.

Priority Transaction Widget Screen Shot

Branch	Process Name	Stage Name	User Id	No.of High Priority Items	No.of Medium Priority Items	No.of Low Priority Items
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Priority Summary			Export LC Advising		⚙️ ×	
Branch	Process Name	Stage Name	No of High Priority Items	No of Medium Priority Items	No of Low Priority Items	
203	Export LC Advising	Sanction Exception Approval	0	0	0	
203	Export LC Advising	AML Exception Approval	0	0	0	
203	Export LC Advising	Retry Hand Off	0	0	0	



3 Priority Detailed Widget

As a user I want to access Priority Detailed widget from the Dashboard

Summary

As a User you can access Priority Detailed Widget from the Trade Mid Office (TMO) system Dashboard. Once user clicks on an item in the widget, based on his access credentials, the system will allow you only a read only view of the record.

Description

As a user when you log in to Tread Mid Office (TMO) Solution application with appropriate credentials, user should be able to see the Dashboard screen. User will be able to see the Priority Detailed Widget on dashboard.

Priority Detailed Widget Screen Shot

Branch	Process Name	Stage Name	Process Reference Number	Customer Name	User Id
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Priority Details					
Branch	Process Name	Stage Name	Process Reference Number	Customer Name	User ID
004	CorporateLending Loan Origination	Loan Application Entry	004LNORGN181030373	NA	OBCLPM8
004	NA	Amendment Entry	004LNRSTR181030372	NA	OBCLPM8
004	NA	Amendment Entry	004LNRSTR181030370	NA	OBCLPM8

4 Hold Transaction Widget

As a user you can access Hold Transaction widget from the Dashboard

Summary

As a User you can access Hold Transaction widget from the Trade Mid Office (TMO) system Dashboard. Based on user access credentials, the system will allow you only a read only view of the record

Description –

As a user when you log in to Tread Mid Office (TMO) system with appropriate credentials, user will be able to see the Dashboard screen. User can see the Hold Transaction widget on dashboard. This widget will list the transactions put 'on hold'.

Hold Transaction Widget Screen Shot

Branch	Process Name	Stage Name	Process Reference Number	Customer Name	Hold time	Hold Reson	User Id
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Hold Transactions							
Branch	Process Name	Stage Name	Process Reference Number	Customer Name	Hold Time	Hold Reason	User ID
No data to display.							

Filters:

Filter criteria available for Hold Transaction will be based on - Branch, Date Range, Process Name, Stage name.

Status= Hold

5 Hand-off Failure Widget

User can access Hand-Off Failure widget from the Dashboard

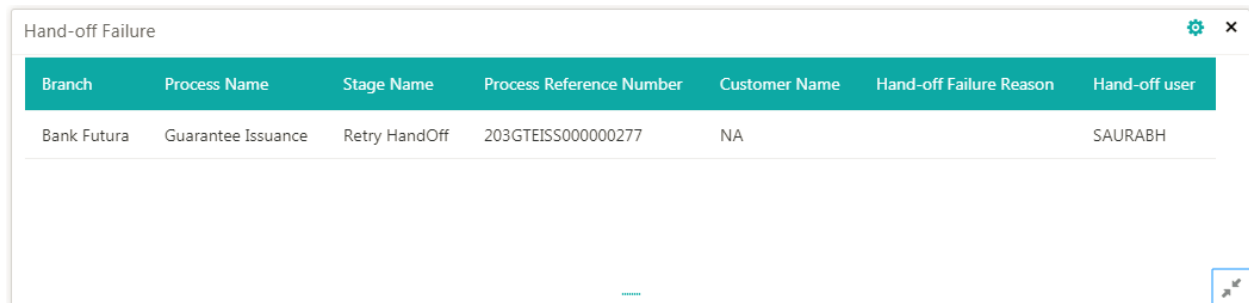
Summary

User can access Hand-Off Failure widget from the Trade Mid Office (TMO) system Dashboard. Based on user access credentials, the system will allow you only a read only view of the available record.

Description

When the user logs in to Tread Mid Office (TMO) Solution application with appropriate credentials,he will be able to see the Dashboard screen. User can see the Hand-Off Failure widget on dashboard. System should list the items that failed hand off and need to be retried.

Hand-Off Failure Widget Screen Shot:

A screenshot of a web application window titled "Hand-off Failure". The window contains a table with 7 columns: Branch, Process Name, Stage Name, Process Reference Number, Customer Name, Hand-off Failure Reason, and Hand-off user. The first row of data shows: Bank Futura, Guarantee Issuance, Retry HandOff, 203GTEISS000000277, NA, and SAURABH. The table is styled with a teal header and a light gray body. There are settings and close icons in the top right corner of the window, and a small icon in the bottom right corner.

Branch	Process Name	Stage Name	Process Reference Number	Customer Name	Hand-off Failure Reason	Hand-off user
Bank Futura	Guarantee Issuance	Retry HandOff	203GTEISS000000277	NA		SAURABH

*List the transactions for the given criteria where Status= Hand-off Failed

6 High Value Transactions Widget

User can access High Value Transaction widget from the Dashboard

Summary-

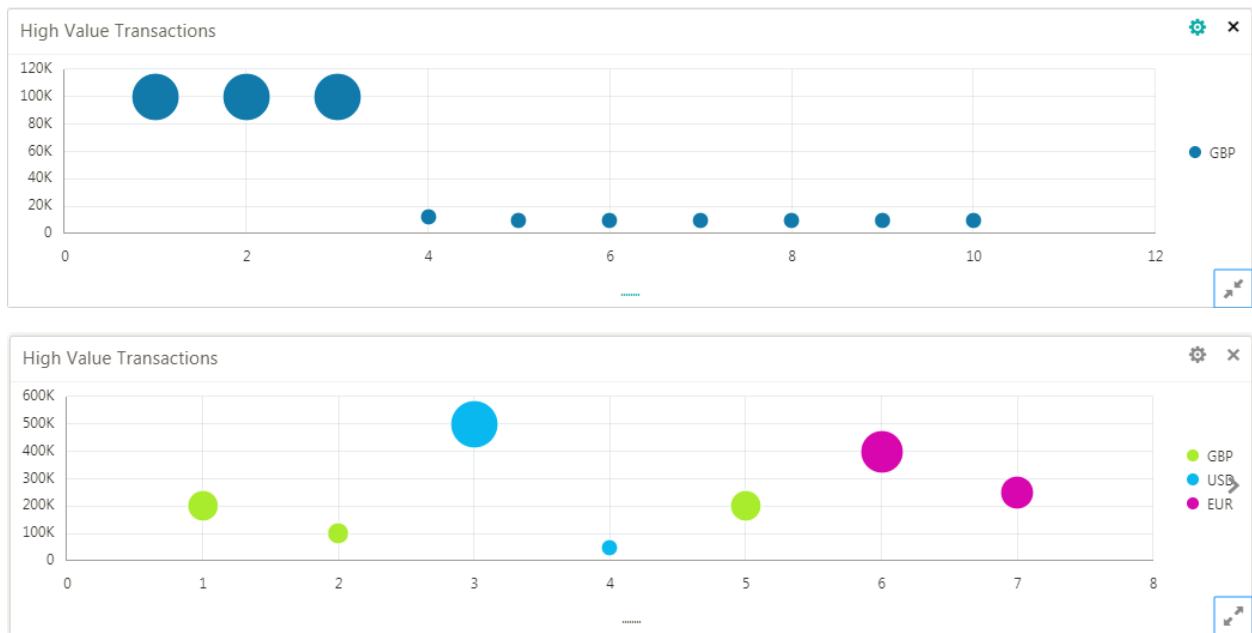
User can access High Value Transaction widget from the Trade Mid Office (TMO) system Dashboard.

Based on user access credentials, you can view (read only) the detailed transaction from the widget.

Description

User when logs in to Tread Mid Office (TMO) System with appropriate credentials, user will be able to see the Dashboard screen. User can see the High Value Transaction widget on dashboard.

High Value Transaction Widget Screen Shot



Filters:

Filter criteria available for High Value Transaction will be based on - Branch, Date Range, Process Name, Customer Name, Currency (Cur) and Amount.

7 Task Detailed Widget

User can access Task Detailed widget from the Dashboard



Summary

User can access Task Detail widget from the Trade Mid Office (TMO) system Dashboard.

Description –

User when logs in to Tread Mid Office (TMO) Solution application with appropriate credentials, User will be able to see the Dashboard screen. User can see the Task Detail widget on dashboard.

Task Detailed Widget Screen Shot

Tasks Detailed		Export LC Advising				 
Process Reference Number	Process Name	Stage Name	Currency	Amount	Branch Name	
203ELCADV000000343	Export LC Advising	Scrutiny	GBP	1000	Bank Futura	
203ELCADV000000300	Export LC Advising	Amount Block Exception Approval	GBP	12112	Bank Futura	
203ELCADV000000252	Export LC Advising	Data Enrichment	GBP	99999	Bank Futura	

Filters:

Filter criteria will be based on - Branch, Date Range, Process Name, Stage Name, Currency (Cur) and Amount.

Process Reference Number	Process Name	Stage Name	Currency	Amount	Branch name

8 Draft Confirmation Pending Widget

User can access Draft Confirmation Pending widget from the Dashboard

Summary

User can access Draft Confirmation Pending widget from the Trade Mid Office (TMO) system Dashboard.

Description –

User when logs in to Tread Mid Office (TMO) Solution application with appropriate credentials, user will be able to see the Dashboard screen. User can see the Draft Confirmation Pending widget on dashboard.

This widget provides a branch wise, customer wise breakup of Draft confirmation for Import LC and Guarantee that are pending for receipt from customer.

From the widget, user will be able to send a reminder to the customer.

Draft Confirmation Pending Widget Screen Shot

Draft Confirmation Pending						
Customer Name	Application Date	Currency	Amount	Process Reference Number	Process Name	Branch Name
EMR & CO	25-06-2018	GBP	1200	203ILCISS000000196	NA	Bank Futura
NA	25-06-2018	GBP	10001	203GTEISS000000188	Guarantee Issuance	Bank Futura
NA	21-06-2018	GBP	100000	203GTEISS0000001661	Guarantee Issuance	Bank Futura

Customer Name	Application Date	Currency	Amount	Process Reference Number	Branch name
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Filters:

Filter criteria will be based on - Branch, Date Range, Process Name, Stage Name, Currency (Cur) and Amount.

Reference and Feedback

References

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

- Oracle Banking Procedure User Guide
- Oracle Banking Common Core

Feedback and Support

Oracle welcomes customers' comments and suggestions on the quality and usefulness of the document. Your feedback is important to us. If you have a query that is not covered in this user guide or if you still

need assistance, please contact documentation team.