Oracle Banking Credit Facilities Process Management

Dashboard User Guide

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Chapter 1

Introduction

A brief introduction to the OBCFPM Dashboard User Guide.

This guide helps you in getting familiarize with the various tiles in OBCFPM Dashboard and performing necessary operations from the Dashboard.

Audience

Intended audience of OBCFPM Dashboard User Guide.

This document is intended for all the users of OBCFPM application in the bank.

Common Icons in OBCFPM

List of icons commonly used in OBCFPM for quick reference.

The following table describes the icons that are commonly used in OBCFPM:

Table 1-1 Common Icons

Icons	Purpose
	To add new record.
	To modify existing record.
	To delete a record.
	To pick start or end date.
	To configure or change default settings.
	To view the data in graphical format.

Table 1-1 (Cont.) Common Icons

Icons	Purpose
	To change the screen layout to list view.
	To change the screen layout to table view.
	To change the screen layout to tree view.
	To view, edit, and delete a record.
	To hold the process.
	To go back to the previous screen.
	To go to the next data segment.
	To save the captured information and exit the process window.
	To submit the task to next stage.
	To exit the window without saving the captured information.

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Chapter 2

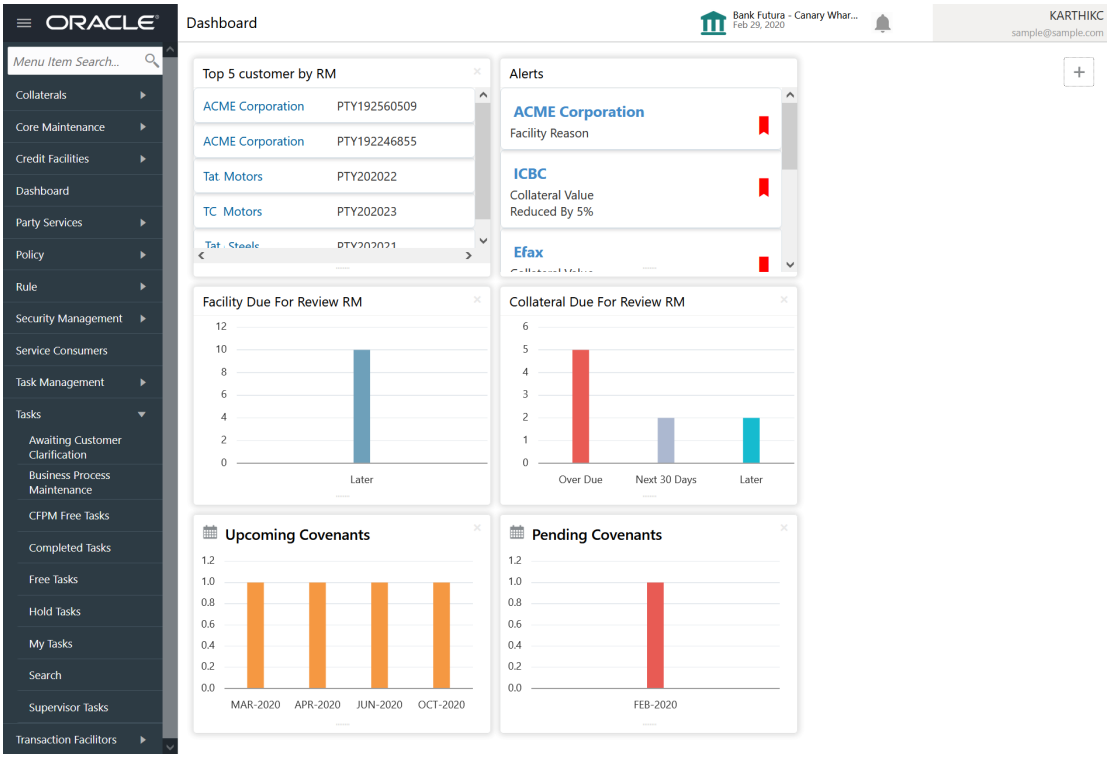
About Dashboard

Overview of Dashboard in OBCFPM.

Dashboard in OBCFPM is a smart UI built to simplify the work of banking personnels. Information displayed in the Dashboard highlights the activities to be performed by the bank user over a certain period of time. It also allows to quickly navigate to the required page to perform the listed actions or to view customer information. By taking all the necessary actions listed in the Dashboard, the bank users can increase their productivity and ensure smooth functioning of the bank.

Dashboard in OBCFPM differs based on the user roles. A sample RM Dashboard in OBCFPM is shown below for reference:

Figure 2-1 Dashboard



3

Chapter 3

Customizing Dashboard

Procedure to customize dashboard.

All the Dashboards (Dashboard specific to all the users) in OBCFPM are customizable, thus you can customize it based on your preference.

In the Dashboard:

1. To close the tile that is not required, click the close icon in the tile.
2. To flip the tile forward, click the flip forward icon.
3. To flip the tile backward, click the flip back icon.
4. To reorder the tile, click the drag to reorder icon and drag the tile to the required position.
5. To expand the tile, click the expand tile icon.
6. To add a new tile, click the add icon at the top right corner.

   The **Add Tiles** window is displayed.
7. Click on the required tile.

   The tile is added to the Dashboard.

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Chapter 4

Navigating from Dashboard

Information on how to navigate from Dashboard.

Navigating to the required page to perform necessary action or view a piece of information is time consuming. To enable the user to quickly jump to the required page, the Dashboard is provided with corresponding links in each tile.

The information that can be viewed from or the actions that can be performed from the following Dashboard tiles are explained in detail in this chapter:

- Alerts
- Collateral Due for Review
- Facility Due for Review
- Collateral Due for Review RM
- Facility Due for Review RM
- Pending Exception
- Top 5 Customer by RM
- Upcoming Covenants
- Pending Covenants

Alerts

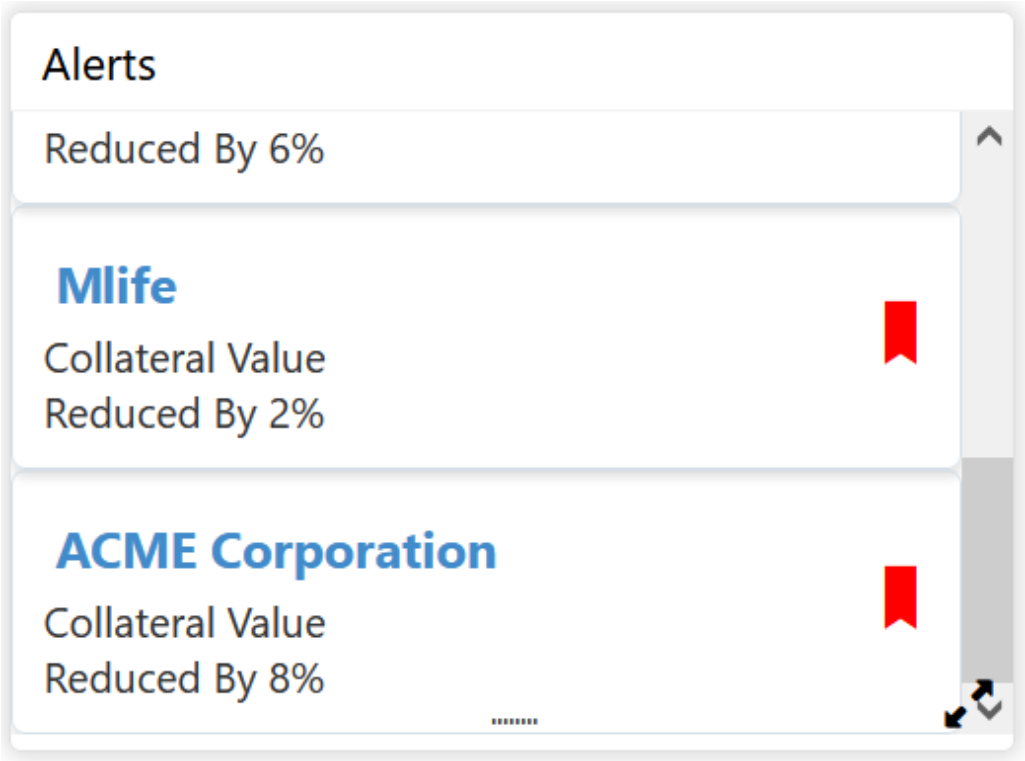
Information on the Alerts tile in Dashboard.

This tile lists the action items that require immediate attention by the user. You can view the action details and perform any of the actions listed in the following table:

Table 4-1 Alerts - Actions

Action	Result
Facility Amendment	Facility Amendment process will be initiated.
Facility Closure	Facility Closure process will be initiated.
Collateral Review	Collateral Review process will be initiated.
Collateral Substitution	Collateral Substitution process will be initiated.
Dismiss	Alert will be dismissed.
Reschedule	Upon clicking Reschedule option, Reschedule date field is displayed. Select the Reschedule date. Alert will be snoozed for the specified time period.

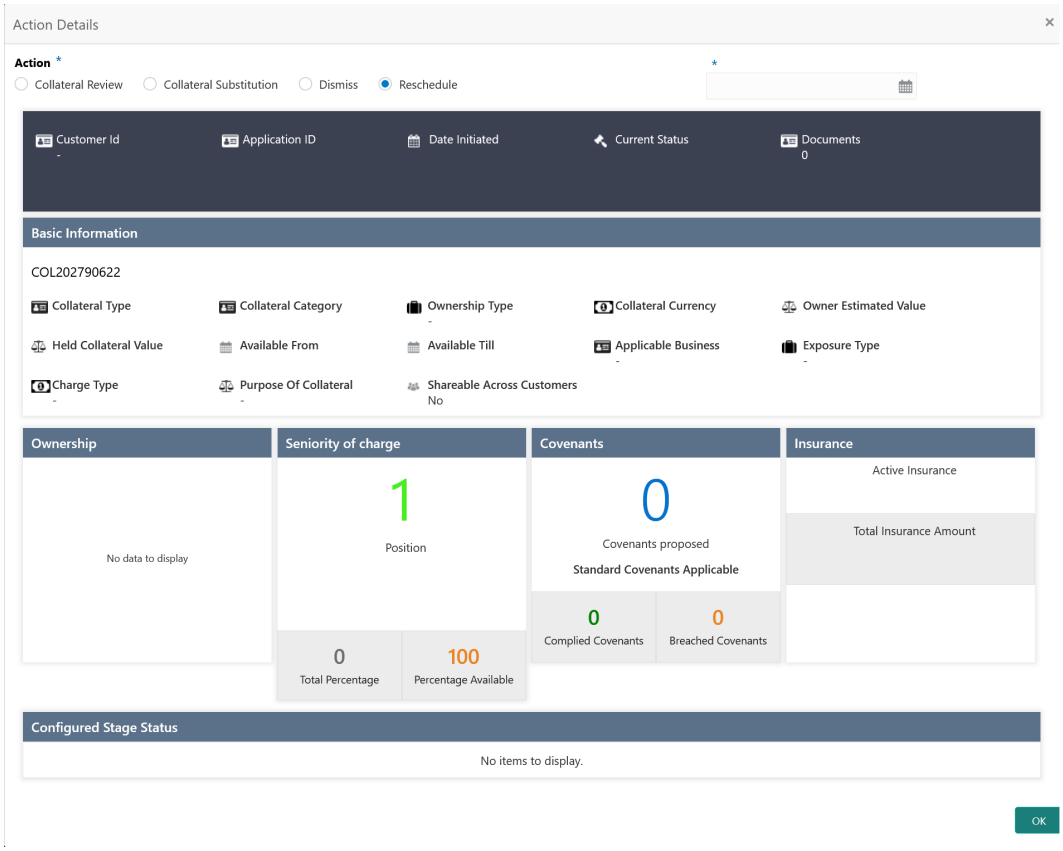
Figure 4-1 Alerts



1. Click the required action item.

   The **Action Details** window is displayed.

Figure 4-2 Action Details



2. View the action details and select the required option.
3. Click **OK**.

Collateral Due for Review

Information on the Collateral Due for Review tile in Dashboard.

This tile lists the collaterals which past the review date or for which the review is pending.

> **Note:**
>
> This tile is not applicable for RM.

For information on Collateral Due for Review tile, refer **Collateral Due for Review RM** topic.

Facility Due for Review

Information on the Facility Due for Review tile in Dashboard.

This tile lists the facilities which past the review date or for which the review is pending.

> **Note:**
>
> This tile is not applicable for RM.

For information on Facility Due for Review tile, refer **Facility Due for Review RM** topic.

Collateral Due for Review RM

Information on the Collateral Due for Review RM tile in Dashboard.

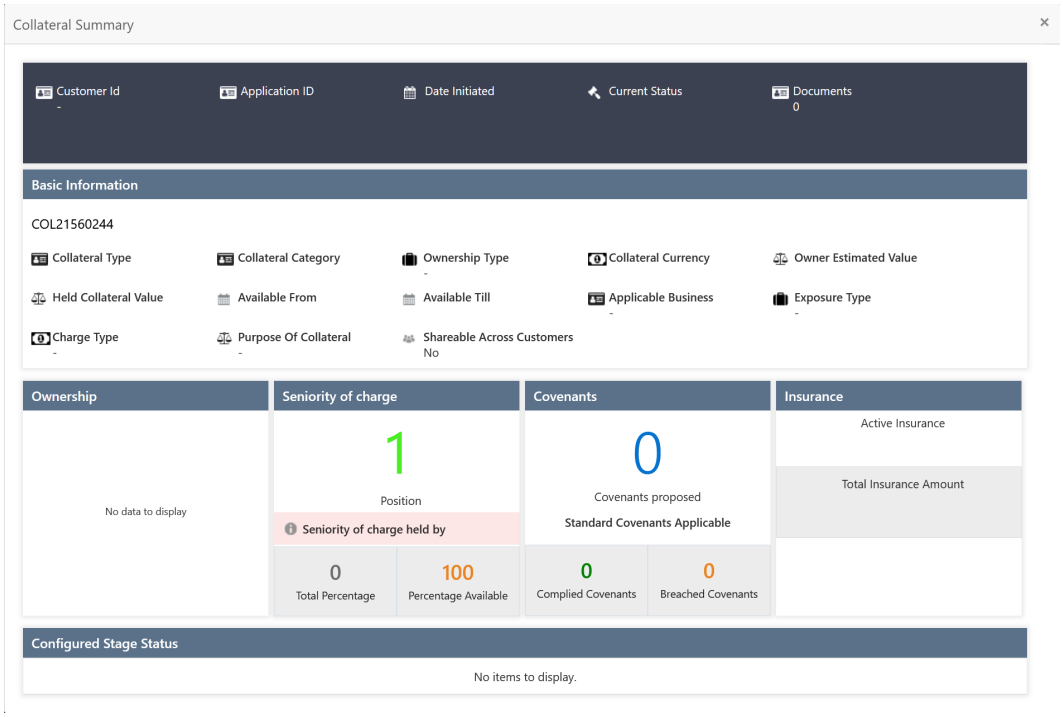
This tile lists the collaterals which past the RM review date or for which the RM review is pending.

Figure 4-3 Collateral Due for Review RM - List

1. Click on the required collateral ID.

   The **Collateral Summary** is displayed.

Figure 4-4 Collateral Summary



> **Note:**
>
> In the bar chart view, click on the bar and then select the **Collateral ID** to launch the **Collateral Summary** screen.

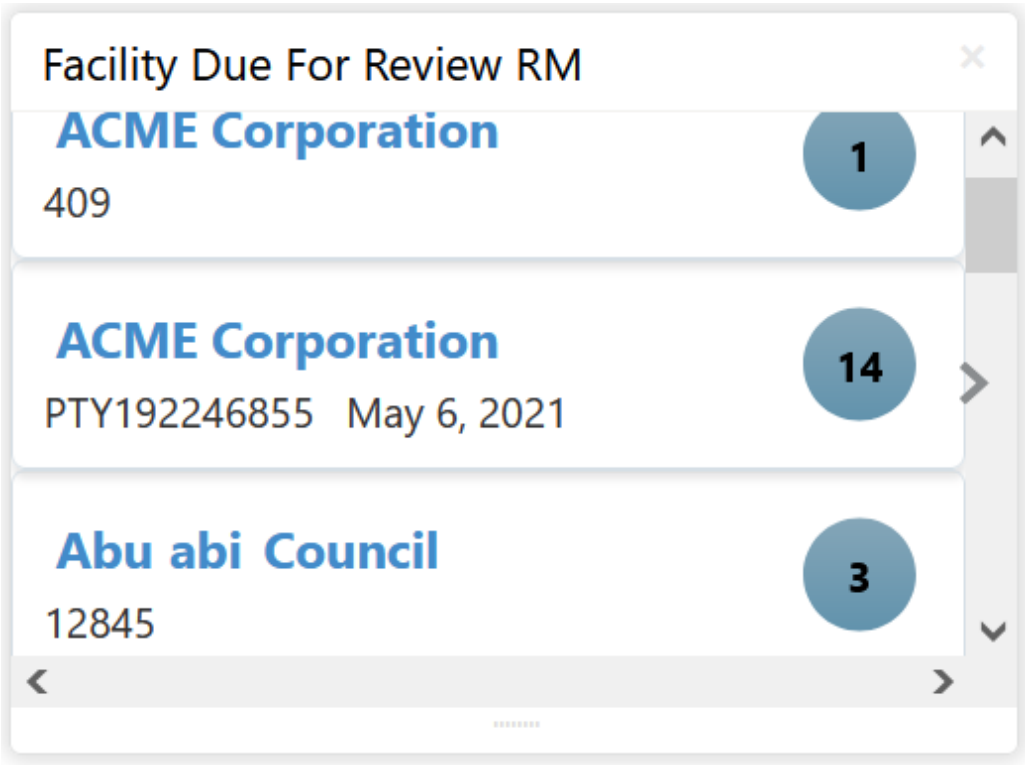
2. Review the collateral summary.
3. Click the close icon at the top right corner.

Facility Due for Review RM

Information on the Facility Due for Review RM tile in Dashboard.

This tile lists the facilities which past the RM review date or for which the RM review is pending.

Figure 4-5 Facility Due for Review RM



1. Click on the count next to the required customer.

   The **Review Summary** window is displayed.

Figure 4-6 Review Summary

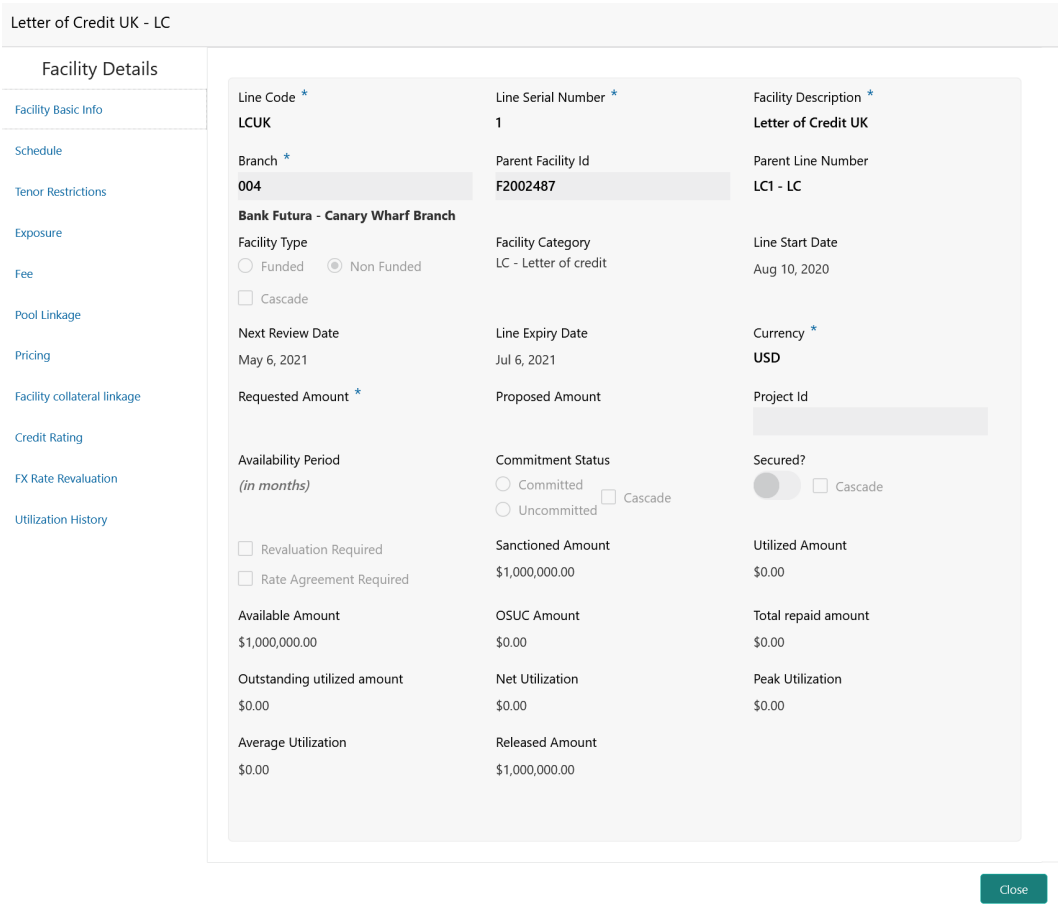
Review Summary

Line No	Facility Id	Facility Type	Parent Line No	Facility Category	Review Date	Approved Amount	Utilized Amount
GTY1	F2002477	NF		GTY	06May 21	$5M	$0
LCUK1	F2002490	NF	LC1	LC	06May 21	$1M	$0
STLNIND1	F2002479	F	STLOAN1	TL	06May 21	$2M	$0
STLNUK1	F2002480	F	STLOAN1	TL	06May 21	$1M	$0
LTWC1	F2002481	F		WC	06May 21	$1.5M	$0
STWC1	F2002482	F		WC	06May 21	$2.5M	$0
STWCUK1	F2002483	F	STWC1	WC	06May 21	$1M	$0
STWCUS1	F2002484	F	STWC1	WC	06May 21	$1M	$0
STWCIND1	F2002485	F	STWC1	WC	06May 21	$500K	$0

2. Click on the required **Line No**.

   The **Facility Details** window is displayed.

Figure 4-7 Facility Details



> **Note:**
>
> In the **Facility Details** window, you can edit the details for which modification is allowed in Business Process Configuration. For detailed information on the sub-menu, refer Credit Proposal User Guide.

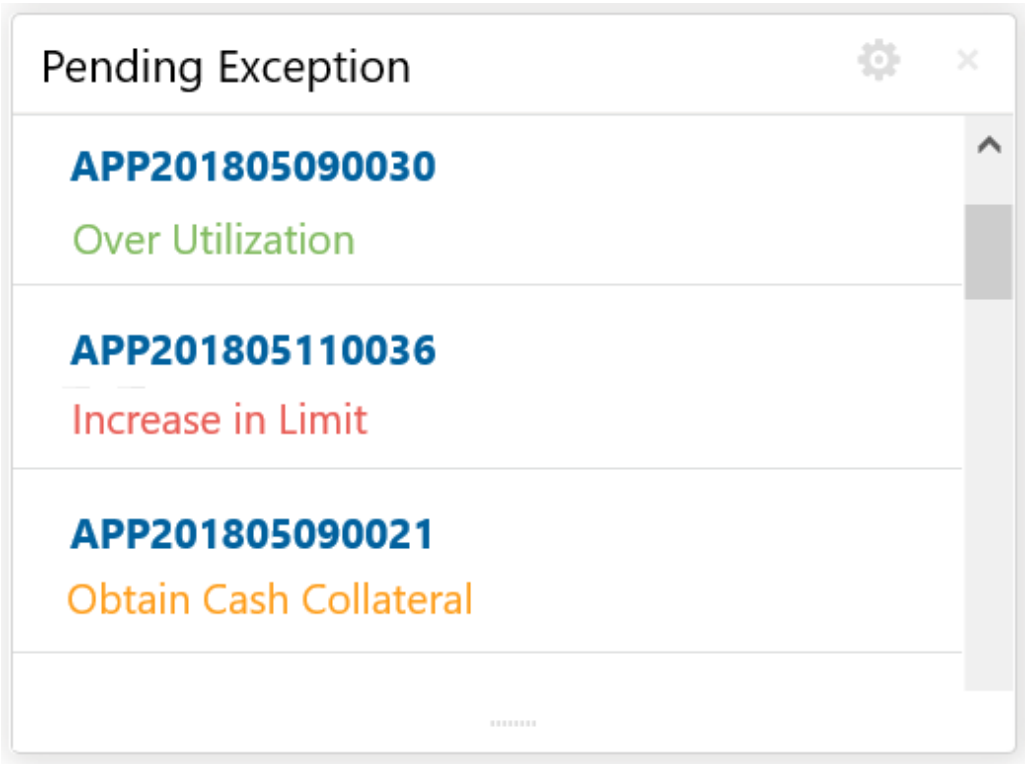
3. To exit the **Facility Details** window, click **Close**.

Pending Exception

Information on the Pending Exception tile in Dashboard.

This tile lists the policy exceptions for which the review is pending.

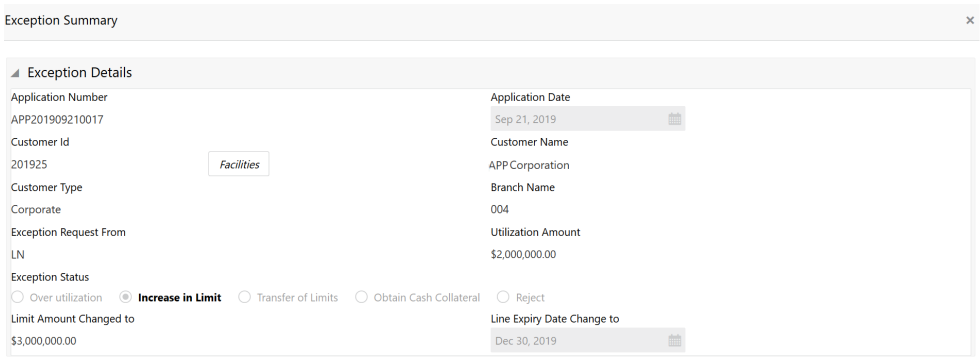
Figure 4-8 Pending Exception



1. Click on the required application ID.

   The **Exception Summary** is displayed.

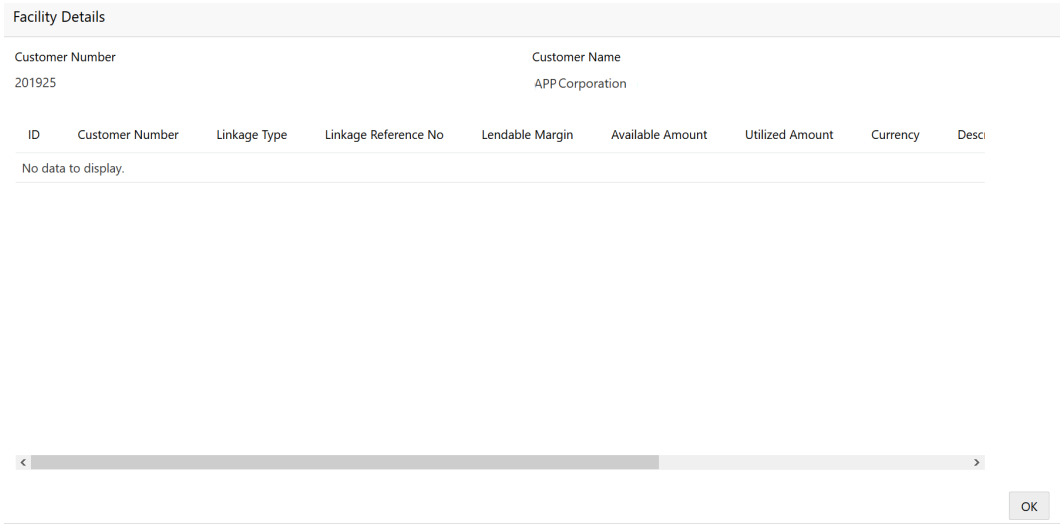
Figure 4-9 Exception Summary



2. To view the facility details, click **Facilities**.

   The **Facility Details** window is displayed.

Figure 4-10 Facility Details



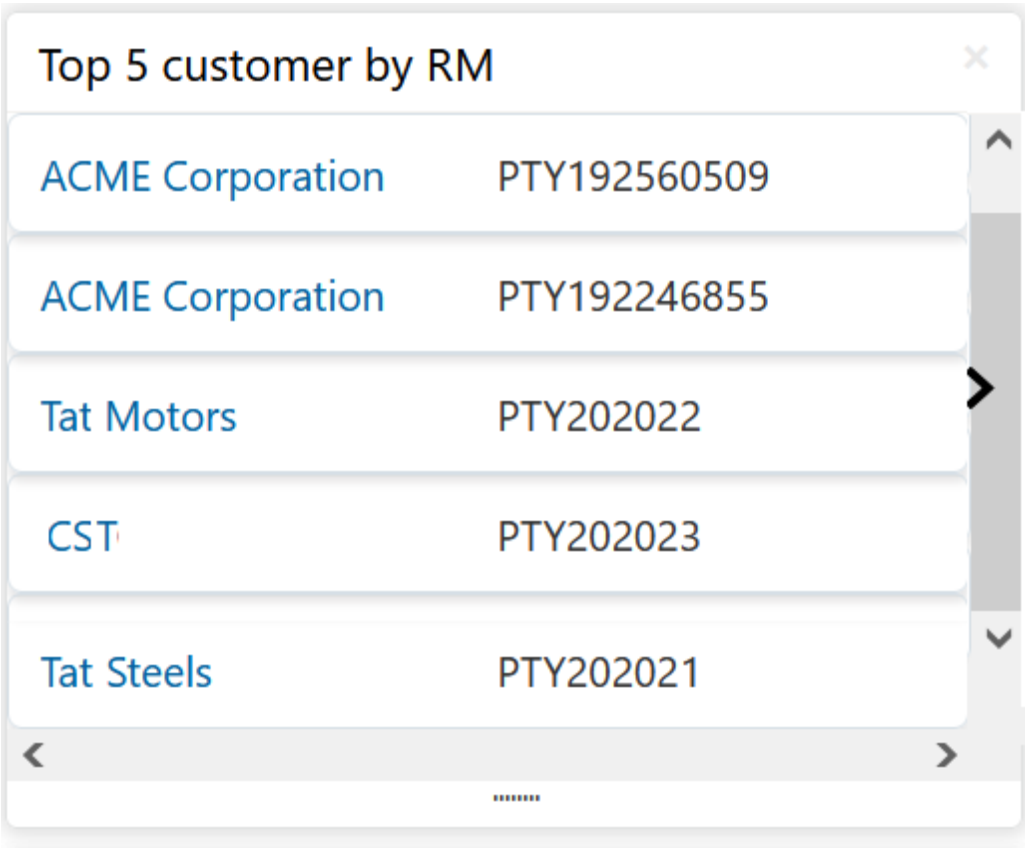
3. View the facility details and click **OK**.
4. To close the **Exception Summary**, click the close icon at the top right corner.

Top 5 Customer by RM

Information on the Top 5 Customer by RM tile in Dashboard.

This tile lists the top five customers associated with the logged in user along with the funding information.

Figure 4-11 Top 5 customer by RM



1. To view the detailed customer information, click on the required customer name.

   The **Customer Summary** is displayed.

Figure 4-12 Customer Summary

2. Review the **Customer Summary**.

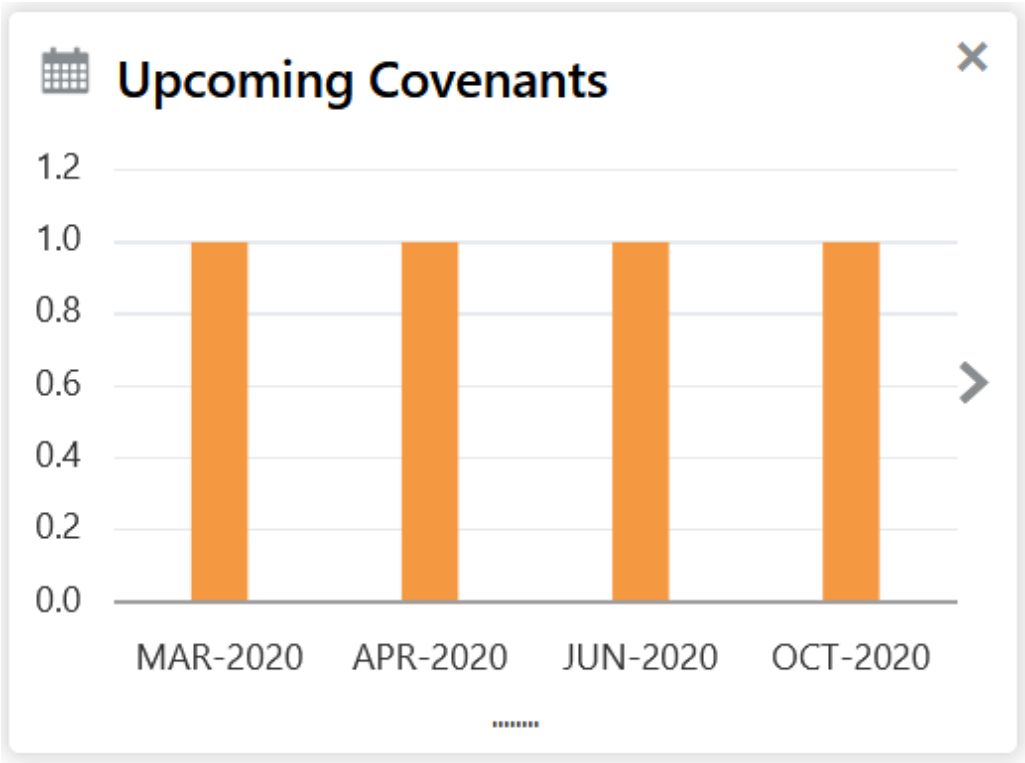
3. Click the close icon at the top right corner.

Upcoming Covenants

Information on the Upcoming Covenants tile in Dashboard.

This tile displays the covenants which have review due date in the upcoming days.

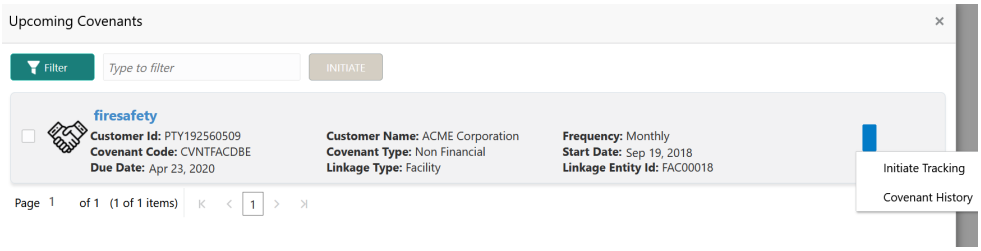
Figure 4-13 Upcoming Covenants Tile



1. Click on any bar or date.

   The **Upcoming Covenants** window is displayed.

Figure 4-14 Upcoming Covenants



2. To filter the required covenant record, click the **Filter** icon and specify the search parameters or directly specify the parameter in **Type to filter** text box.

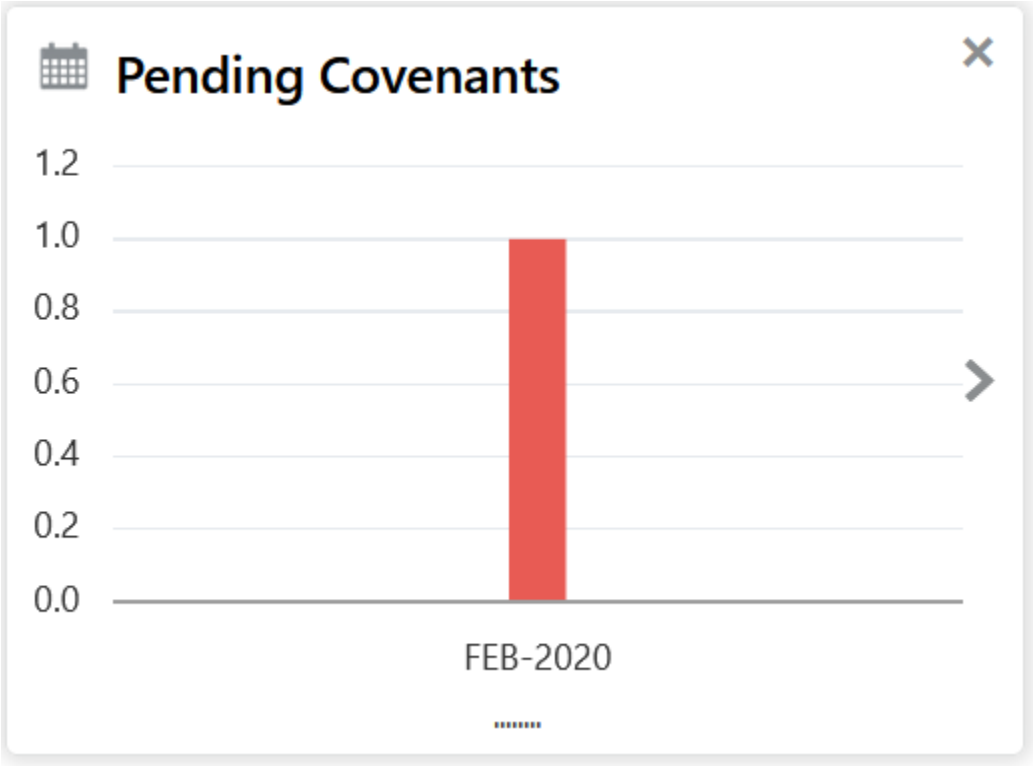
3. To initiate Covenant Tracking process, select the covenant and click **Initiate** or click the action icon and select **Initiate Tracking**.
4. To view the covenant history, click the action icon and select **Covenant History**.
5. To close the **Upcoming Covenants** window, click the close icon.

Pending Covenants

Information on the Pending Covenants tile in Dashboard.

This tile displays the covenants for which review is pending.

Figure 4-15 Pending Covenants



For information on initiating Covenant Tracking process, refer the **Upcoming Covenants** topic.

5

Chapter 5

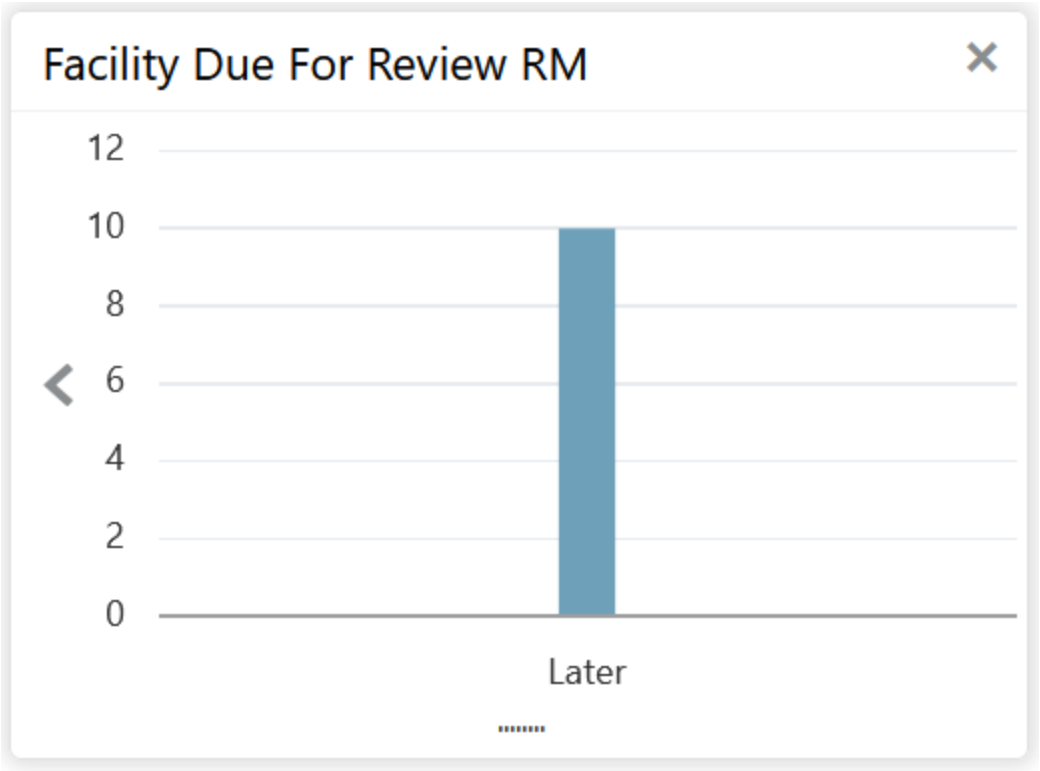
Filtering Data in Dashboard

Information on how to filter data in the Dashboard.

The system allows you to filter the required information from each tile of the Dashboard in graphical view.

The **Facility Due for Review RM** tile in graphical view is shown below for reference:

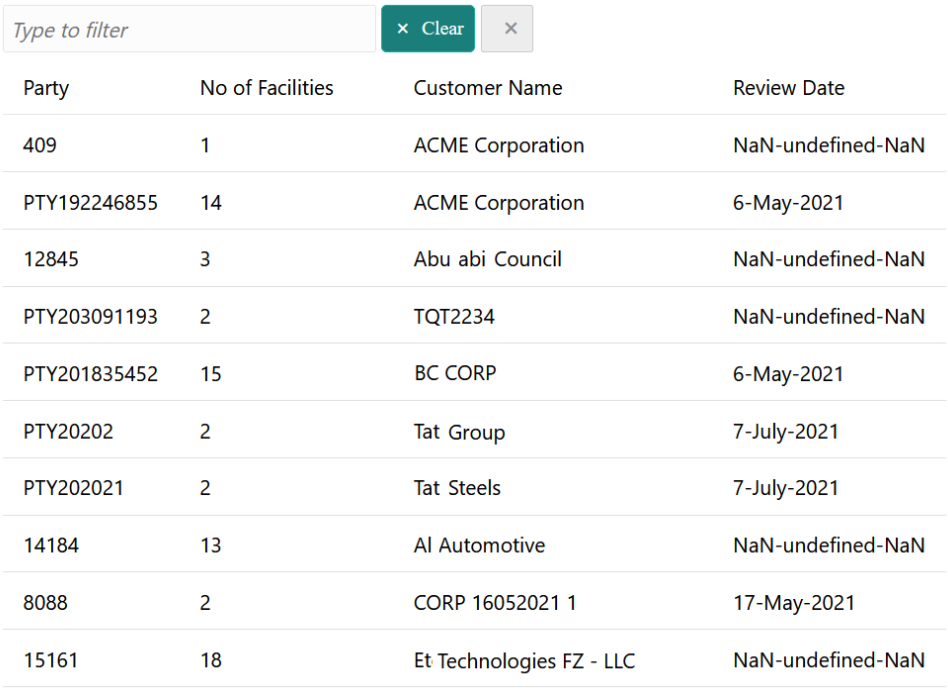
Figure 5-1 Facility Due for Review RM - Chart



1. Click any bar in the graph.

   The **Filter** window is displayed.

Figure 5-2 Filter

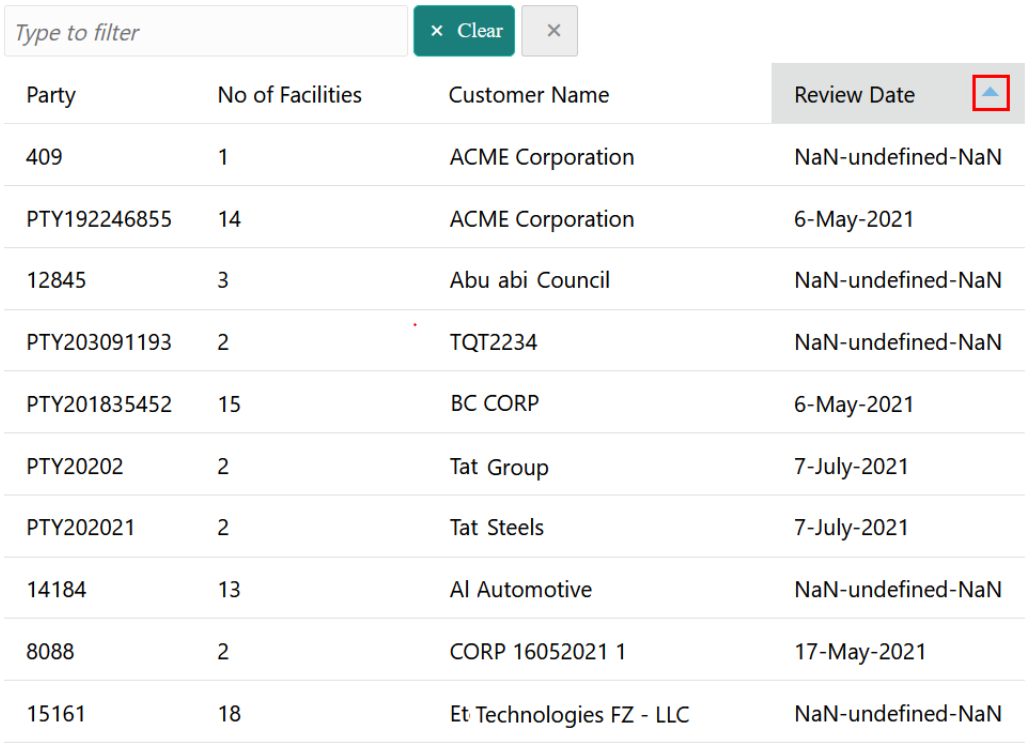


2. Type the filter parameter in the **Type to filter** text box.

   For example: type the first three characters of customer name, facilities associated with the mentioned customer are displayed.

3. To sort the data in ascending or descending order, click the triangle next to any header as shown below.

Figure 5-3 Sort records



Party	No of Facilities	Customer Name	Review Date
409	1	ACME Corporation	NaN-undefined-NaN
PTY192246855	14	ACME Corporation	6-May-2021
12845	3	Abu abi Council	NaN-undefined-NaN
PTY203091193	2	TQT2234	NaN-undefined-NaN
PTY201835452	15	BC CORP	6-May-2021
PTY20202	2	Tat Group	7-July-2021
PTY202021	2	Tat Steels	7-July-2021
14184	13	Al Automotive	NaN-undefined-NaN
8088	2	CORP 16052021 1	17-May-2021
15161	18	Et Technologies FZ - LLC	NaN-undefined-NaN

4. To close the **Filter** window, click anywhere outside the window.

6

Chapter 6

References

User guides of modules related to Credit 360 interface.

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

- Oracle Banking Procedure User Guide
- Oracle Banking SMS User Guide
- Oracle Banking Common Core User Guide
- Oracle Banking Credit Facilities Process Management Installation Guides

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