Contents

1 Welcome to Oracle Banking Credit Facilities Process Management ..............................................1-4
2 Alerts........................................................................................................................................2-5
3 Collateral Due for Review ........................................................................................................3-6
4 Facility Due for Review ............................................................................................................4-7
5 Collateral Due for Review – By Relationship Manager ..............................................................5-8
6 Facility Due for Review – By Relationship Manager ...............................................................6-9
7 Pending Credit Exception .........................................................................................................7-10
8 Reference and Feedback ...........................................................................................................8-11
  8.1 References .................................................................................................................................8-11
  8.2 Feedback and Support ...............................................................................................................8-11
Welcome to 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:

<table>
<thead>
<tr>
<th>Customer</th>
<th>Remarks</th>
<th>Type</th>
<th>Criticality</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>TATA Sons</td>
<td>Collateral Value Reduced By 92%</td>
<td></td>
<td>Critical</td>
<td></td>
</tr>
<tr>
<td>Amazon</td>
<td>Collateral Value Reduced By 92%</td>
<td></td>
<td>Critical</td>
<td></td>
</tr>
<tr>
<td>TATA Sons</td>
<td>Collateral Value Reduced By 42%</td>
<td></td>
<td>Critical</td>
<td></td>
</tr>
<tr>
<td>TATA Sons</td>
<td>Collateral Value Reduced By 42%</td>
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<td>Critical</td>
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</tr>
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<td>Collateral Value Reduced By 42%</td>
<td></td>
<td>Critical</td>
<td></td>
</tr>
</tbody>
</table>

Expanded View:

<table>
<thead>
<tr>
<th>Customer</th>
<th>Remarks</th>
<th>Type</th>
<th>Criticality</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>TATA Sons</td>
<td>Collateral Value Reduced By 92%</td>
<td>Collateral</td>
<td>Critical</td>
<td></td>
</tr>
<tr>
<td>Amazon</td>
<td>Collateral Value Reduced By 92%</td>
<td>Collateral</td>
<td>Critical</td>
<td></td>
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<td>TATA Sons</td>
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<td>Collateral</td>
<td>Critical</td>
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</tr>
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<td>TATA Sons</td>
<td>Collateral Value Reduced By 42%</td>
<td>Collateral</td>
<td>Critical</td>
<td></td>
</tr>
</tbody>
</table>

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 are pending for an action. The user also has an option to dismiss the alert.

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

Collateral pending for Review dashboard will show the collateral code, customer name followed by review date.
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 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 of expired and pending for an action.

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.

<table>
<thead>
<tr>
<th>Facility Due For Review</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FY1804251504</td>
<td>1-June-2018</td>
</tr>
<tr>
<td>General Motors</td>
<td></td>
</tr>
<tr>
<td>FY1804251503</td>
<td>1-June-2018</td>
</tr>
<tr>
<td>Hathway Cables</td>
<td></td>
</tr>
<tr>
<td>FY1804251506</td>
<td>1-June-2018</td>
</tr>
<tr>
<td>Equifax</td>
<td></td>
</tr>
</tbody>
</table>

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:

Expanded View:

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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