

Checklist Maintenance User Guide
Oracle Banking Trade Finance Process Management
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Oracle Banking Trade Finance Process Management - Checklist Maintenance User Guide
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Checklist Maintenance

Checklist Maintenance process enables the OBTFPM user to maintain Checklist Items and map them to the process and stage level.

The user can Create Checklist, Map Checklist to Process- Stage and View Checklist Summary.

This section contains the following topics:

[Creating Checklist](#)

[Viewing Checklist](#)

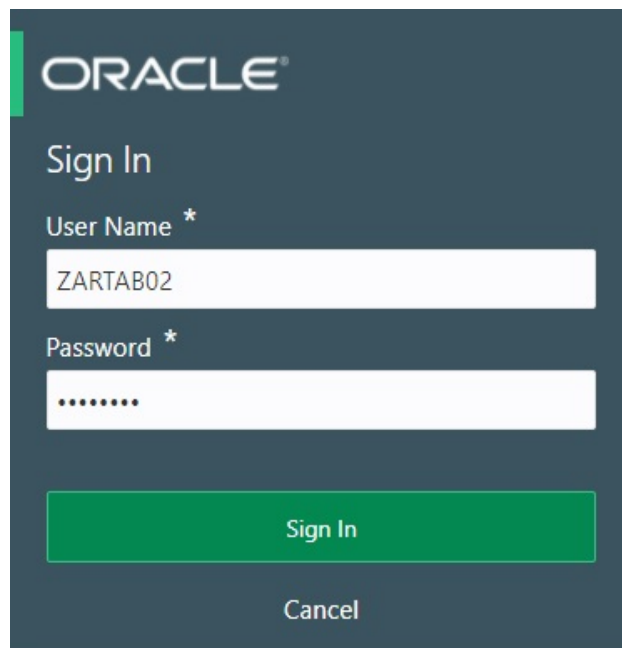
[Creating Checklist Linkage](#)

[Viewing Checklist Linkage](#)

Creating Checklist

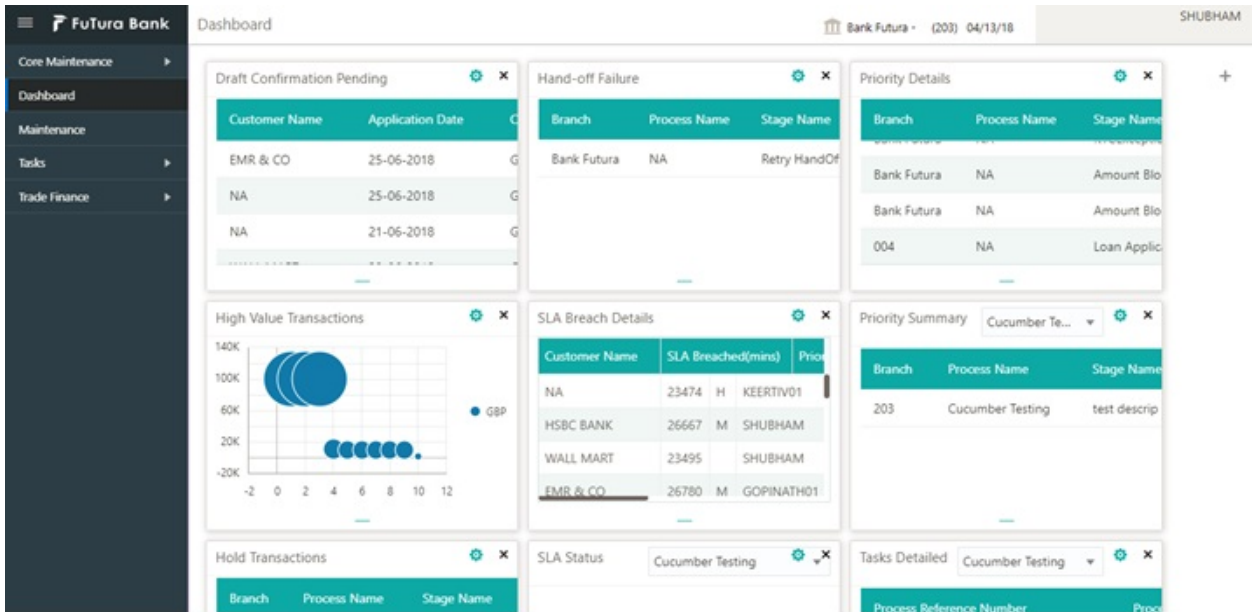
This process allows the user to create a checklist. In the subsequent steps, let's look at the steps of creating a Checklist process:

1. Using the entitled login credentials for Registration stage, login to the OBTFPM application.



The image shows a screenshot of the Oracle Sign In dialog box. The dialog has a dark blue background with the Oracle logo at the top left. Below the logo, the text "Sign In" is displayed. There are two input fields: "User Name *" with the value "ZARTAB02" and "Password *" with masked characters. At the bottom, there are two buttons: "Sign In" (green) and "Cancel" (white).

2. On login, user must be able to view the dashboard screen with widgets as mapped to the user.



3. Click **Core Maintenance > Checklists > Checklist Maintenance**.

The Checklist maintenance screen appears.



4. Click Plus icon. The Checklist screen with fields appear.

Checklist ✖

Checklist *	Checklist *
Code	Name
CHC0351	Checklist_03

Save Cancel

Provide the field description based on the following table.


Field	Description
Checklist Code	Enter the unique Checklist Code.
Checklist Name	Enter the description of the Checklist.

Action Buttons

Field	Description
Save	Click to save the record.
Cancel	Click to cancel the record.

Audit

Maker

 OBTFFPM09

 5/5/2021, 8:12:13 AM

Status

 Unauthorized

 Open

Checker





Modification No

1

Field	Description
Maker ID	System displays the maker ID.

Field	Description
Checker	System displays the checker ID.
Time stamp	System displays the maker id date and time stamp.
Time stamp	System displays the checker id date and time stamp.
Modification No.	Displays the modification number.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

Viewing Checklist

The user can view the summary of Checklist Items maintained in the form of tiles. The user can view the maintained checklist, if checklist is already available in the system. The user can view the checklist items in the 'List' or 'Table' form, by clicking the List or Table icon on the top right corner of the screen.

1. Click **Core Maintenance > Checklists > Checklist Maintenance**.

The screenshot displays the Oracle Checklist Maintenance interface. At the top, there is a navigation bar with the Oracle logo, the page title 'Checklist Maintenance', and user information '(DEFAULTTENITY)' and '(PK2) May 5, 2021'. Below the navigation bar, there is a search and filter bar. The main content area shows two checklist tiles. The first tile is for 'Checklist_03' with code 'CHC0351' and status 'Unauthorized'. The second tile is for 'checklist_01' with code 'CHC0350' and status 'Unauthorized'. Both tiles have an 'Open' button. Below the tiles, there is a pagination bar showing 'Page 1 of 1 (1 - 2 of 2 items)'.

Field	Description
Checklist Code	The unique Checklist Code.
Checklist Name	The description of the Checklist.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

2. Click the  icon, and then click **Authorize** to Authorize the checklist or **Delete** to delete the checklist.

Checklist Linkage Maintenance

The process allows the user to map Checklist items to Process and Stage level.

Creating Checklist Linkage

The user can create a new mapping of a checklist items to a process and stage. In the subsequent steps the mapping process is described.

1. Core Maintenance > Checklists > Checklist Linkage Maintenance.

2. Click Plus icon. The **Checklist Linkage Maintenance** screen with fields appear.

Provide the field description based on the following table.

Field	Description
Process Code	Select the process code to which this checklist has to be mapped from LOV.
Process Name	The process name is populated based on selected process code.
Application Category Code	Select the application category code.
Application Category Name	The application category name is populated based on selected process code.

Field	Description
Stage Code	Select the stage code in process to which this checklist has to be mapped.
Stage Name	The stage name is populated based on selected process code.
Checklist Code	
Component	Select the unique checklist component from the LOV and link checklist code.
Mandatory	Select the check box, if the checklist is to be maintained as a mandatory Checklist item.

Action Buttons

Field	Description
Add	Click Add to add the component of checklist.
Remove	Click Remove to remove the checklist component.
Save	Click to save the record.
Cancel	Click to cancel the record.

Audit

Maker

 OBTFFPM09

 5/5/2021, 8:12:13 AM

Status

 Unauthorized

 Open

Checker





Modification No

1

Field	Description
Maker ID	System displays the maker ID.
Checker	System displays the checker ID.
Time stamp	System displays the maker id date and time stamp.
Time stamp	System displays the checker id date and time stamp.
Modification No.	Displays the modification number.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

Viewing Checklist Linkage

The user can view the summary of Checklist Items maintained in the form of tiles. The user can view the maintained checklist, if the checklist is already created in the system. The user can view the checklist linkage items in the 'List' or 'Table' form, by clicking the List or Table icon on the top right corner of the screen.

1. Click **Core Maintenance > Checklists > Checklist Maintenance**.

Checklist Linkage Maintenance

Process Code: ELCDRW
Application Category Code: TFPM_FA_COMMO...
Stage Code: TFPM_FA_COMMO...
Unauthorized Open

Process Code: ELCUDR
Application Category Code: TFPM_FA_ELCUDR...
Stage Code: TFPM_FA_ELCUDR...
Unauthorized Open

Process Code: GTEISS
Application Category Code: TFPM_FA_GTEISS_S...
Stage Code: TFPM_FA_GTEISS_S...
Unauthorized Open

Page 1 of 1 (1 - 3 of 3 items)

Field	Description
Process Code	Displays the process code to which this checklist is mapped.
Application Category Code	Displays the application category code.
Stage Code	Displays the stage code in process to which this checklist is mapped.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

2. Click the icon and then click **Authorize** to Authorize the checklist or **Delete** to delete the checklist .

A

Action Buttons 3

C

Creating Checklist 1

 Action Buttons 3

 Audit 3

Creating Checklist Linkage

 Action Buttons 6

 Audit 6

V

Viewing Checklist Linkage 7

References

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

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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