Dashboards and Alerts

Oracle Banking Enterprise Limits and Collateral Management

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Dashboard User Guide
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Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway
Goregaon (East
Mumbai, Maharashtra 400 063
India
Worldwide Inquiries:
Phone: +91 22 6718 3000
Fax:+91 22 6718 3001
www.oracle.com/financialservices/

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1. Preface

1.1 Introduction

This document is designed to help acquaint you with the features of Dashboard, which is the landing page of Oracle Banking Enterprise Limits and Collateral Management. Information from multiple products is integrated and displayed as Dashboard on the home page of the application.

This manual explains the functionality of Dashboard facility and the various Dashboards present in the system. Besides providing these details, the manual also provides a list of Dashboards mapped to the role of the bank staff logged on to the system.

1.2 Audience

This manual is intended for the following User/User Roles:

Role	Function
Loan/Trade Officers	To view a summary of the transactions assigned to them, messages and EOD exceptions, if any
Loan/Trade Authorizers	To view unauthorized transactions assigned to them, messages and EOD exceptions, if any
Loan/Trade Supervisors	To view subordinate wise summary report of the transactions, messages and EOD exceptions, if any
Branch/Relationship Managers	To view details of the transactions completed by them and their team

1.3 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.

1.4 Organization

This manual is organized into the following chapters:

Chapter 1	*About this Manual* gives information on the intended audience. It also lists the various chapters covered in this User Manual.
Chapter 2	*An Overview* gives an overview of the Dashboard facility in Oracle Banking Enterprise Limits and Collateral Management
Chapter 3	*Dashboards* gives detailed information on Dashboards assigned to each 'User Role' and also about the organization of these Dashboards
Chapter 4	*Alerts* discusses the user alerts feature of Oracle Banking Enterprise Limits and Collateral Management
Chapter 5	*Function ID Glossary* has alphabetical listing of Function/Screen ID's used in the module with page references for quick navigation.

1.5 Acronyms and Abbreviations

Abbreviation	Description
System	Unless and otherwise specified, it shall always refer to Oracle Banking Enterprise Limits and Collateral Management
EOD	End of Day
DFI	Dashboard Function ID

1.6 Glossary of Icons

This User Manual may refer to all or some of the following icons.

Icons	Function
	Exit
	Add row
	Delete row
	Option List

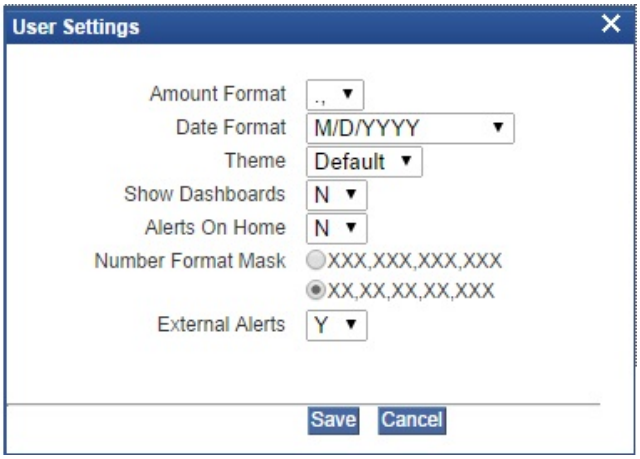
2. An Overview

2.1 Introduction

Dashboards are the tiny windows displayed on the landing page of the Application. Dashboard renders quick and crisp information of specific transactions or tasks mapped to the ‘User Role’ of the Bank staff, who logs on to the system.

2.2 Dashboard Organization

Dashboard on the home page of the application provides a summary view of information that the user need to know. You can view the dashboards if the ‘Show Dashboard’ field value is maintained as ‘Y’ in the ‘User Settings’ field. Mouse over the user name on the Home page and select ‘User Settings’ from the menu.



Dashboards provides comprehensive and consolidate snapshot in tiny windows, to access information easily. This helps the bank staff to analyze, monitor, and make better decisions which in turn help save time and cost.

The height and width of all Dashboards are fixed; however, the number of columns per Dashboard varies based on the size and name of the columns specified at Dashboard design level.

The following buttons and links at the top of each Dashboard aid in viewing the additional records in a dashboard:

Button/Link	Functionality
Previous	Click the button to view the previous set of 5 records.
Next	Click the button to view the next set of records. However, if there are more than 5 entries then only the next five can be viewed.
Refresh	Click the button to manually refresh and view the first five records.
More	Click this link to launch a screen with more information similar to that of the current Dashboard.

The following hyperlinks are also available in each Dashboard:

- Column-wise link – Each column in the Dashboard can be mapped to a different Function ID to provide column-wise hyperlinks. Click the hyperlink in a particular column to launch the corresponding Function ID. A link to a particular column is limited only to that column.
- Row wise link – Each row in the Dashboard can be mapped to a different Function ID to provide row-wise hyperlinks. Click the hyperlink in a particular row to launch the corresponding Function ID. A link to a particular row is the same across all fields in that row.

Note

– Hyperlinked rows and columns are highlighted to distinguish them from others. When a row/column link is clicked, the clicked row/column gets highlighted respectively.

You can map any number of Dashboard function IDs (DFI) to a specific 'Role' or 'User' at Role Mapping and Dashboard Mapping level. If DFIs are mapped at 'Dashboard Mapping' level, then to enable Dashboards you need to map the corresponding functions/assigned roles at 'Role Mapping' level. You can also specify sequence order of DFIs at 'Dashboard Mapping' level, however, you can specify the same at 'Role Mapping' level. If multiple roles are added and the sequence is not specified, then the system sorts and display the DFIs alphabetically. If DFIs are mapped to 'User', then you can specify the display order for each DFI individually.

3. Maintenances

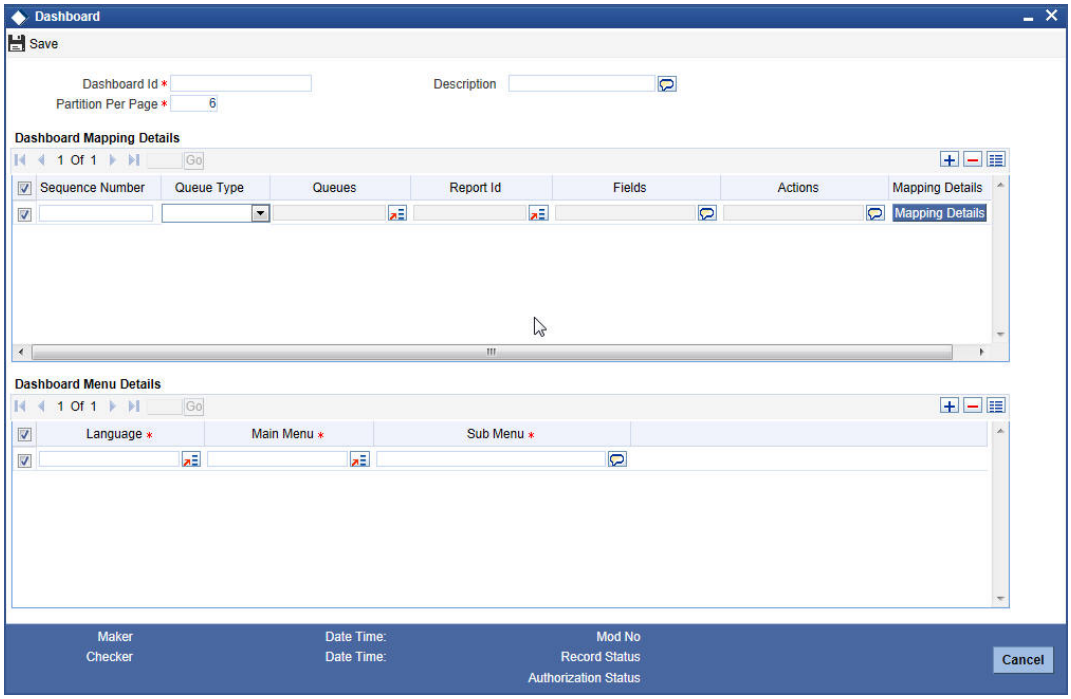
3.1 Introduction

As part of general maintenance required for the successful functioning of Dashboard, you should maintain the following in the system:

- Origination Dashboard Maintenance
- Origination Dashboard Role Maintenance

3.2 Maintaining Origination Dashboard Details

You can maintain dashboard related information using the 'Origination Dashboard Maintenance' screen. You can invoke this screen by tying 'ORDDSHMT' in the field at the top right corner of the Application tool bar and clicking the adjoining arrow button.



Specify the following details:

Dashboard Id

Specify the dashboard id here.

Description

Specify a brief description of the dashboard.

Partition Per Page

Specify the maximum number of partitions to be displayed in each dashboard page. This should be a number between 1 and 6. The minimum partition required is one and the maximum partitions allowed are 6.

Dashboard Mapping Details

Sequence Number

Specify the sequence number for the dashboard. It is used to sequence the order in which the frames are displayed in dashboard.

Queue Type

Select the queue type from the adjoining drop-down list. This list displays the following values:

- Queue - If you select this option, then system displays all valid queue ids in the 'Queue Id' option list.
- Count - If you select this option, then system displays the title for the frame selected.This is used when you want to configure a summary dashboard having multiple queue and their corresponding count.

Queues

If the 'Queue Type' is 'Queue', then the adjoining option list displays all valid queue ids maintained in the system. If the 'Queue Type' is 'Count', then the adjoining option list displays the title for the view.

Report ID

Select the report id for the dashboard from the adjoining option list. This list displays all valid report ids maintained in the system.

Fields

System displays the fields of the dashboard here, based on the fields selected from the 'Mapping Details' screen.

Actions

System displays the fields of the dashboard here, based on the fields selected from the 'Mapping Details' screen.

Dashboard Menu Details

Main Menu

Specify the main menu name here,

Language

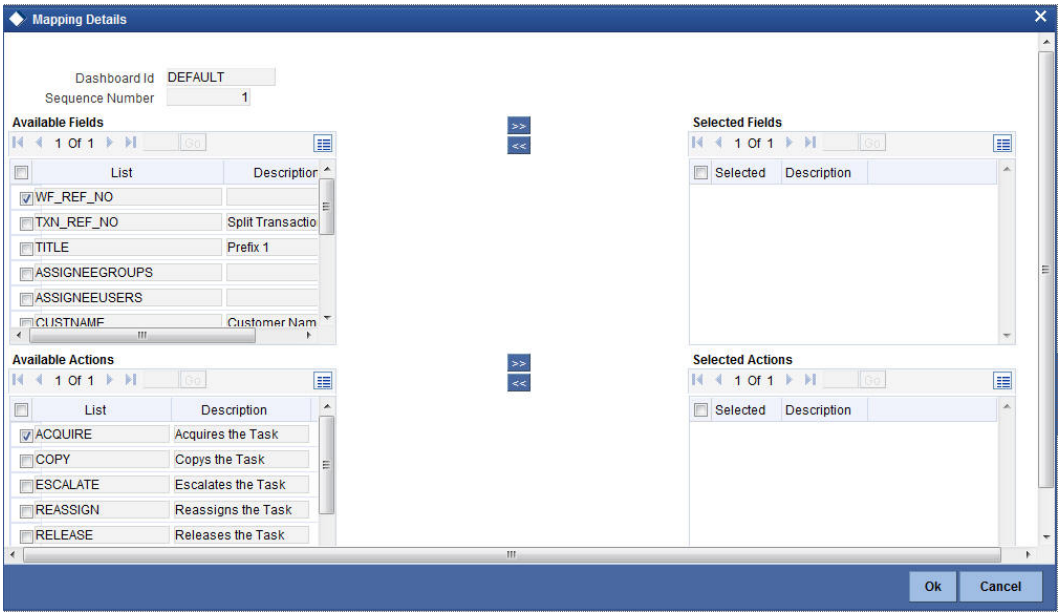
Specify the language code of the dashboard.

Sub Menu

Specify the name of the sub menu.

3.2.1 Specifying the Mapping Details

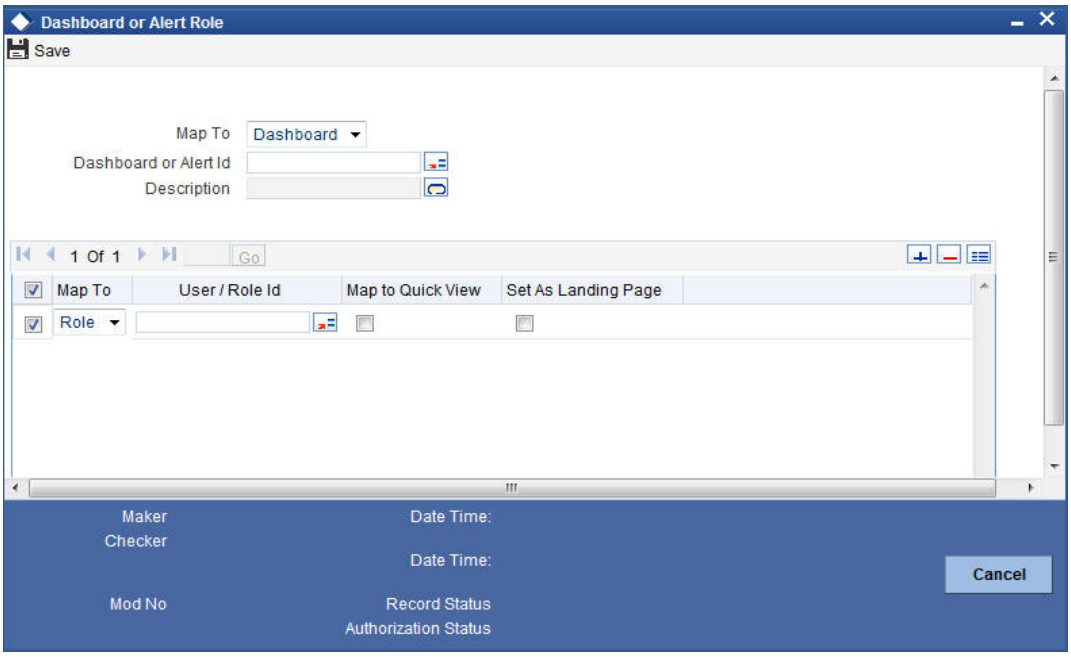
You can select the fields and actions by clicking the ‘Mapping Details’ button in the ‘Origination Dashboard Maintenance’ screen. This screen is used to select the action and columns that you want to perform on a particular frame of the dashboard..



In this screen, you can select the required fields and actions for the dashboard from the Available Fields and Available Actions. Available fields displays all the queues maintained from SMDQUEMT screen, if the option selected is Count in queue type. Available action displays all the actions listed in the header of the task bar. On clicking the right-arrow button, system moves the selected fields and actions to the Selected Fields and Selected Actions sections respectively. Similarly, to de-select an action or a field, click the left-arrow button. Available fields displays blank if the queue type is selected queue and if the option is selected as ‘Queue’.The mapping details are not allowed if the queue type is selected as BAM. The system displays an error message as “No field mappings available for selected queue criteria”.

3.3 Mapping Dashboard and Alerts to User Roles

You can define the role and user for each dashboard using the 'Origination Dashboard Role Maintenance' screen. You can invoke this screen by typing 'ORDDSHRL' in the field at the top-right corner of the Application tool bar and clicking the adjoining arrow button.



Specify the following details:

Map to

You can map user role to alert or dashboard. Select the appropriate option, that is,.Alert or Dashboard from the option list.

Dashboard or Alert ID

Specify the alert ID or dashboard ID that you need to map to user roles.

If you are mapping the user role to a dashboard, then specify the dashboard ID.

If you are mapping the user role to an alert, specify the alert code here.

You can select the appropriate one from the option list. The option list will display all valid dashboard IDs or alerts IDs maintained in the system, based on what is selected under 'Map to'.

Description

System displays the description for the selected dashboard id.

Map To

Select the dashboard mapping from the adjoining drop-down list. This list displays the following values:

- Role - f you select this option, then you can map the dashboard user with specific roles.
- User - If you select this option, then you can map the dashboard to a user.

User/Role Id

Select the user id or role id (based on the mapping type) from the adjoining option list. This list displays all valid user ids and roe ids maintained in the system. You can select the appropriate one.

Map to Quick View

Check this box to indicate that the dashboard should be included in the Quick View frame in the left corner of the ‘Tasks’ tab of Oracle Banking Enterprise Limits and Collateral Management, for a specific user or role.

Set as Landing Page

Check this box to set this dashboard as the landing page dashboard. If you check this option, the user will see this as the default dashboard when navigated to the ‘Tasks’ tab of Oracle Banking Enterprise Limits and Collateral Management.

If a dashboard is mapped as default for a role or user id, then you cannot map another dashboard as default. The system displays an error as “User /Role already has default dashboard” in such case.

If there are different dashboards mapped to role and user id having the same role, then dashboard mapped to the user id will take precedence over the dashboard mapped as default for the role.

4. Dashboards

4.1 Introduction

The credit appraisal management dashboard provides various information to the relationship managers, risk officers, and bank management. The key features of the dashboard are as follows.

- Easy access for relationship managers to the applications mapped to his/her ID.
- Enhanced capability for risk officers to do risk analysis for the applications being processed
- Access for bank managers to view logically categorized applications for easy analysis and processing

You can view the following Dashboards based on the 'User Role' you are mapped to:

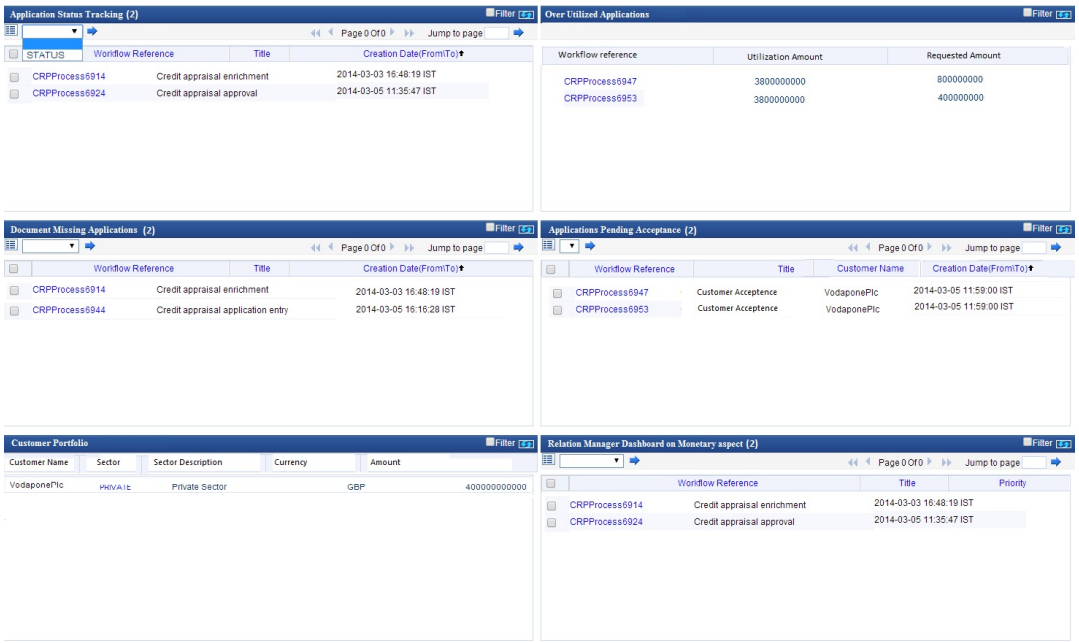
- Relationship manager dashboards
- Covenant renewals dashboard
- Risk office dashboards

Each 'User Role' would not require all of the above, hence the system enables grouping of these Dashboards based on the 'User Role'.

The following sections explain, in detail, the features associated with each Dashboard, the groups, and the 'User Role' associated with each group.

4.2 Relationship Manager Dashboard

In the Relationship Manager Dashboard, the relationship managers can analyse the in-flight credit applications which are mapped to his/her RM ID and track the current status of the applications.



Various dashboards for relationship managers are discussed under the following headings.

4.2.1 Application Status Tracking

In this dashboard, the Relationship Manager can view and track the stage by stage flow of the applications which are mapped to his/her RM ID.

In this dashboard, you can view the following details of each application:

- Workflow reference number
- Title
- Creation date (From/To)

This dashboard has an action ‘Status’, using which you can track the current status of an application.

4.2.2 Over Utilized Applications

This dashboard displays the applications which have reached the threshold limit. An application is listed under this head when the utilization amount has crossed the overall limit.

You can view the following details for each application:

- Application reference number
- Utilization amount
- Requested amount

4.2.3 Document Missing Applications

Applications which are returned with an outcome ‘Documents Missing’ are listed in this dashboard. Relationship managers can communicate the details of missing mandatory documents to the customers for applications associated with their RM ID.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)

4.2.4 Applications Pending Acceptance

This dashboard displays the applications pending for acceptance from customer. Based on this information, the relationship managers can act and get the customer responses for such applications.

You can view the following details for each application:

- Workflow reference number
- Title
- Customer name
- Creation date (From/To)

4.2.5 Customer Portfolio

This dashboard displays the customer specific split of applications along with the overall limit amount and requested amount.

In this dashboard, you can view the following details:

- Customer name
- Sector
- Sector description
- Currency
- Amount

4.2.6 Relation Manager Dashboard on Monetary aspect

The Total number of applications the RM has processed/converted/completed successfully for the current month, for which he can claim monetary benefit, will be displayed in this dashboard.

You can view the following details for each application:

- Workflow reference number
- Title
- Priority

4.3 Covenant Renewals Dashboard

In the Covenant Renewals Dashboard, you can view the following dashboards.

- Facility covenant renewal
- Collateral covenant renewal

4.3.1 Facility Covenant Renewal

In this dashboard, you can view the set of facility covenants that are nearing revision date. For each facility covenant, the following details are displayed in the dashboard.

- Liability number
- Line code
- Serial number
- Covenant name
- Covenant description
- Covenant reference number
- Revision date

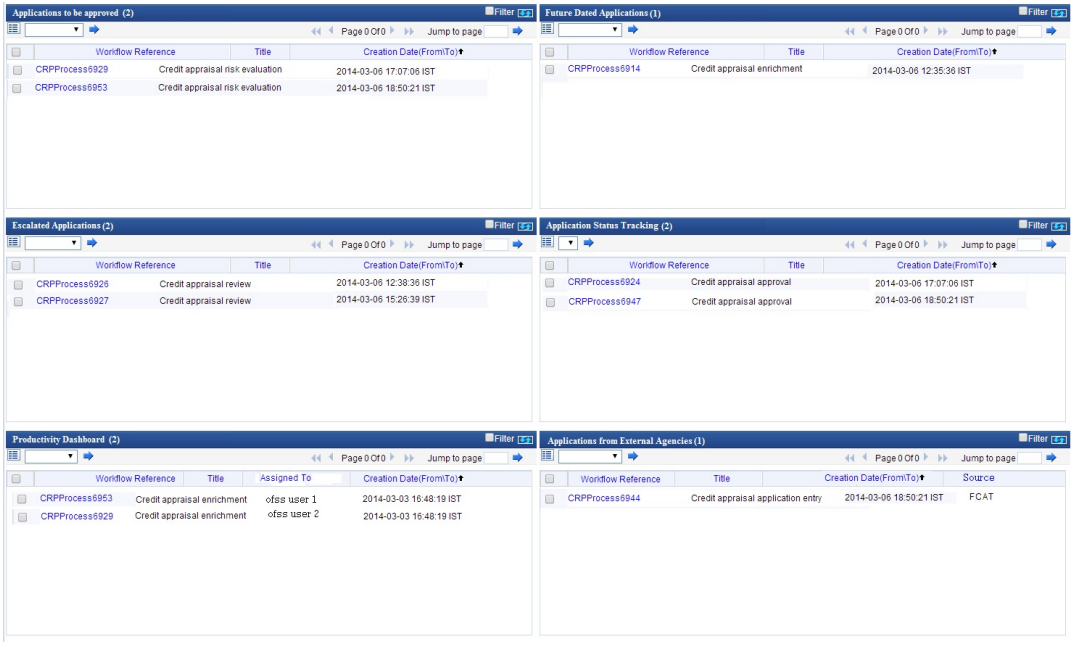
4.3.2 Collateral Covenant Renewal

In this dashboard, you can view the list of collateral covenants that are nearing revision date and need to be renewed. For each collateral covenant, you can view the following details:

- Collateral code
- Liability number
- Covenant reference number
- Covenant name
- Description
- Revision date

4.4 Risk Officer Dashboard

The risk officer dashboards provide the details of applications that helps the risk officers of the bank to swiftly act upon potential risks. This dashboard enables risk officers to perform a credit analysis and evaluate the risks involved in each incoming application.



Various dashboards for risk officers are discussed under the following headings.

4.4.1 Applications to be Approved

The applications pending in risk evaluation stage are listed in this dashboard. The Risk Manager can analyse the applications and approve the ones that he/she thinks fit.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)

4.4.2 Potential Applications for Approval

Applications in the previous stage of the risk evaluation will be listed in this dashboard. Risk managers can view the stage by stage flow of these applications.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)

4.4.3 Escalated Applications

This dashboard displays all applications that are escalated to the risk manager. The risk manager can analyse the applications and act upon them.

Applications are either manually escalated using ‘Escalate’ button in the Task-List dashboard, or pre-configured to get escalated automatically after a specific period.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)

4.4.4 Application Status Tracking

In this dashboard, the risk manager can track the stage by stage flow of the applications that are analysed and approved previously.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)

This dashboard has an action ‘Status’, using which you can track the current status of an application.

4.4.5 Productivity Dashboard

In this dashboard, the risk manager can view the details of applications and users who are subordinates of the risk manager. Such details enables the risk manager to supervise and take necessary actions to speed up the applications that are long pending with the subordinates.

You can view the following details for each application:

- Workflow reference number
- Title
- Assigned to
- Creation date (From/To)

4.4.6 Applications from External Channels

This dashboard displays applications initiated from external channels. Based on the information available in this dashboard, the risk manager can act swiftly on such applications.

You can view the following details for each application:

- Workflow reference number
- Title
- Creation date (From/To)
- Source

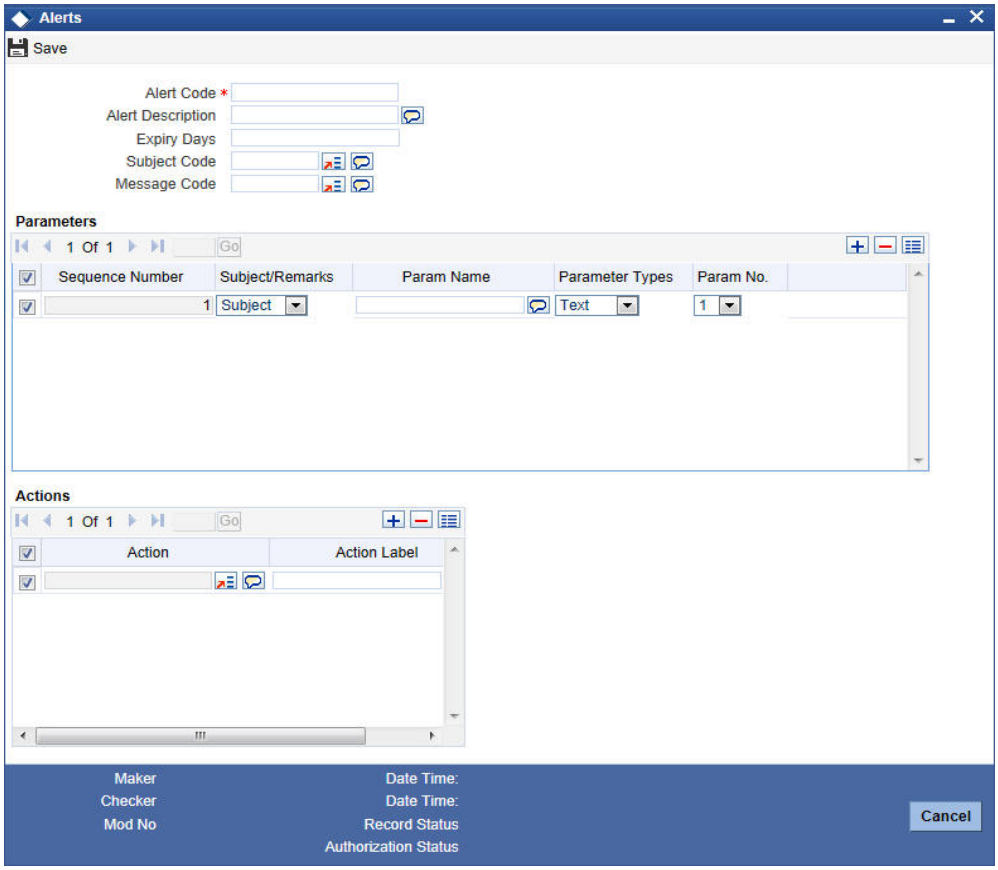
5. Alerts

5.1 Introduction

This chapter discusses the user alerts feature of Oracle Banking Enterprise Limits and Collateral Management. The alerts from the system and other sources such as BIP, BAM, and external sources are processed and dispatched to the users based on the subscriptions and filter criteria maintained.

5.2 Maintaining Alerts

You can maintain the details pertaining to alerts using ‘Alert Maintenance’ screen. To invoke the screen, type ‘ORDALRTM’ in the field at the top right corner of the application toolbar and click the adjoining arrow button.



Specify the following details:

Alert Code

Specify a unique alert code to identify the alert that you are maintaining.

Alert Description

Specify a brief description of the alert.

Expiry Days

Specify the number of days to pass for the alert to expire. The alert is active for the number of expiry days that you specify here.

Subject Code

Select the subject code from the option list. The option list displays valid error codes maintained in the system.

Message Code

Select the message code from the option list. The option list displays valid error codes maintained in the system.

Parameters

Sequence Number

The system displays the sequence number of the parameter.

Subject/Remarks

Specify whether the parameter being defined is for the subject of the alert or for the message of the alert. You can select one of the following options from the drop down list:

- Subject
- Message

Parameter Name

Specify a name for the parameter.

Parameter Type

Specify the type of parameter that you are defining. You can select one of the following parameter types from the option list.

- Text
- Number
- Date

Parameter Number

Specify the parameter number. You can select a number between 1 and 10 as the parameter number. This will be the column name in which the value of the parameter name is processed and inserted.

Actions

Action

You can assign multiple actions for the alert being defined. Specify the action supported for the alert. Select the appropriate one from the option list.

Action Label

Specify the label applicable to the selected action.

Once you have captured the above details, save the maintenance.

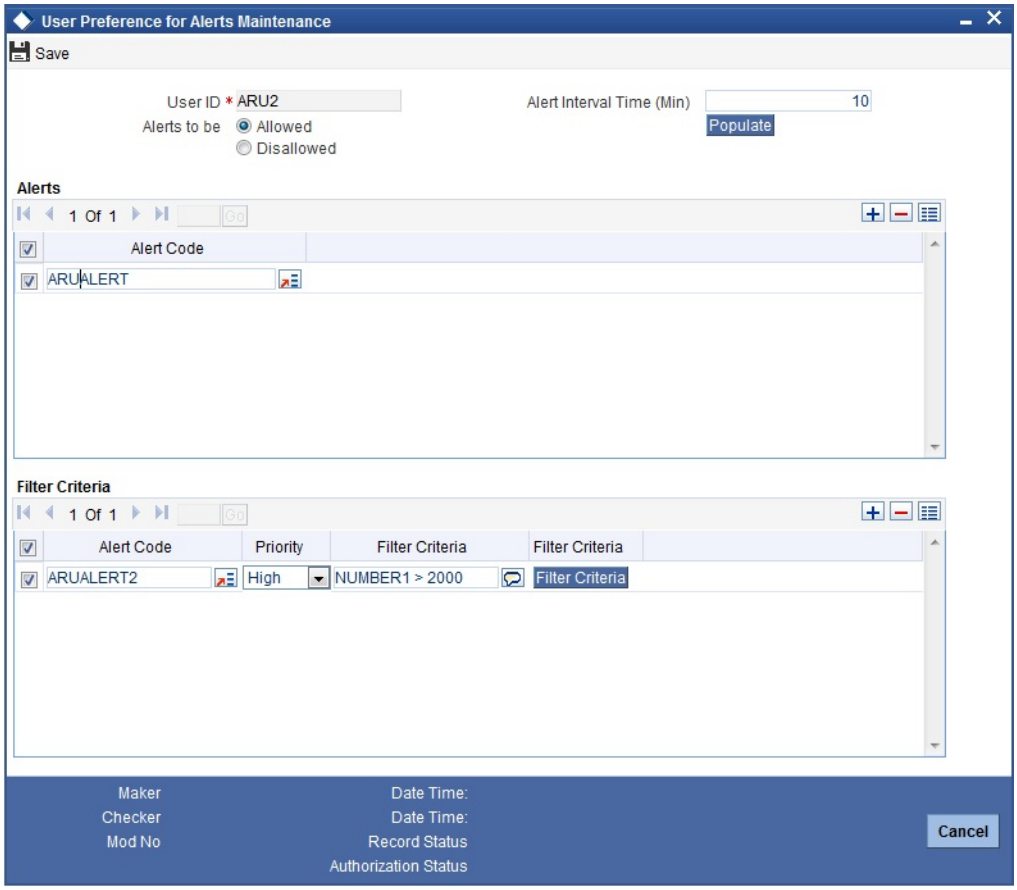
5.3 Mapping Alerts to User Roles and User Profiles

You can map alerts and dashboards to specific user roles and user profiles using ‘Dashboard or Alert Role’ screen. To invoke this screen, type ‘ORDDSHRL’ in the field at the top right corner of the application toolbar and click the adjoining arrow button.

For further details on this screen, refer to the section ‘Mapping Dashboard and Alerts to User Roles’ in chapter ‘Maintenances’ in this user manual.

5.4 Maintaining User Preferences for Alerts

You can maintain the user preferences for alerts using 'User Preferences for Alerts Maintenance' screen. To invoke the screen, type 'ORDUSRPF' in the field at the top right corner of the application toolbar and click the adjoining arrow button.



Specify the following details:

User ID

The system displays the user ID of the user logged in to the current session.

Alerts to be

Specify whether you need to allow or disallow the alert for the selected user. Select the appropriate radio button from the following.

- Allowed
- Disallowed

Alert Interval Time (Min)

Specify the interval time for displaying consolidated alert messages to the user. This interval time should be maintained in minutes. By default, this is set to two minutes. However, you can change this.

Once you have specified the above details, click 'Populate' button to populate the alert codes. The system populates the alerts that the selected user has access to.

Alerts

Alert Code

You can maintain a list of alerts that are allowed or disallowed for the user, based on the option selected under ‘Alerts to be’.

If you have selected ‘Allowed’ under ‘Alerts to be’, then you can maintain the alerts that should be made available to the user.

If you have selected ‘Disallowed’ under ‘Alerts to be’, then you can maintain the alerts that will not be made available to the user.

You can click add button to add more rows to the list. You can delete an existing alert code from the list by clicking delete button.

Filter Criteria

The system display specific alerts to the user if certain conditions are satisfied. You can maintain the conditions and the alerts to be displayed on fulfilling such conditions under ‘Filter Criteria’.

Alert Code

Specify the alert code to which the filter criteria is applied. The system displays this alert to the user of fulfilling the condition defined.

Priority

Specify the priority of the alert. You can select one of the following priority options.

- High
- Medium
- Low

Filter Criteria

Specify the condition to be fulfilled for displaying the alert to the user.

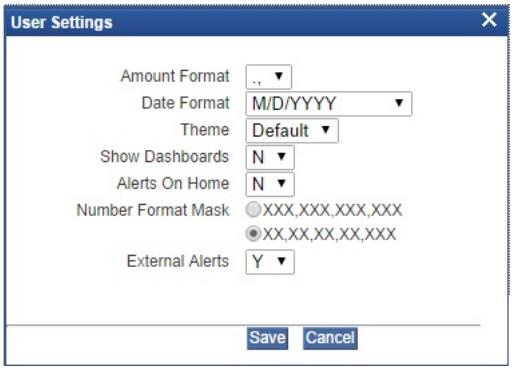
You can also define the condition using ‘Condition Builder’ screen. Click the ‘Filter Criteria’ button to invoke the ‘Condition Builder’ screen.

Once you have captured all the details, save the preferences by clicking ‘Save’ button.

5.5 Switching On / Switching Off Alerts

You can enable or disable the display of alerts subscribed by you from the landing page of Oracle Banking Enterprise Limits and Collateral Management. In the landing page, mouse

over on your user name and select User Settings. The system displays the user settings window.



External Alerts

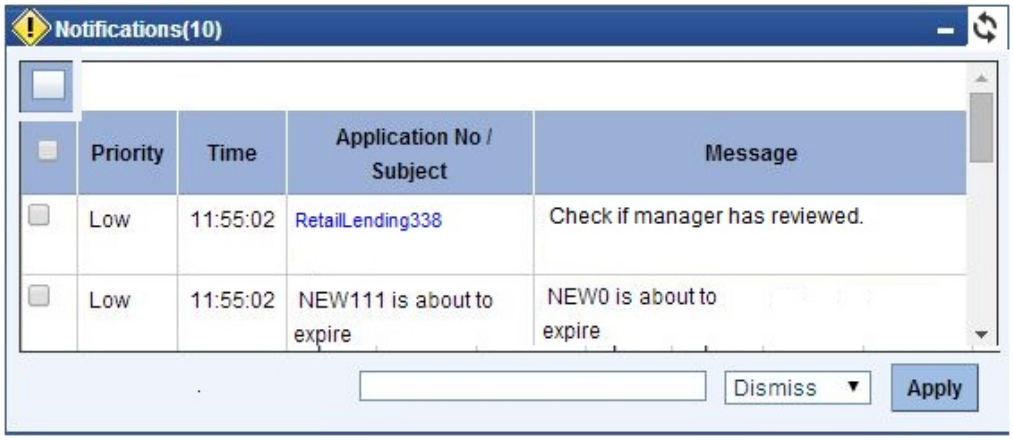
Specify whether you want to be notified of the alerts that come from external sources. You can select one of the following options.

- Yes - select 'Yes' to get notified of new alerts
- No - select 'No' if you do not wish to get notified

After changing the settings, click 'Save' button to apply the changes.

5.6 Alerts Notification

At specific intervals maintained in the 'User Preferences for Alerts Maintenance' screen, the system pops up a notification window the consolidated alert messages from various sources.



You can view the following details of each alert message:

Priority

The system displays the priority of the alert message, that is, high, medium or low.

Time

The system displays the time at which the alert message was generated.

Application Number/Subject

The system displays the subject line of the alert.

In case of reminder alerts, this may be the application number. If you have sufficient rights, you can click the application number to invoke the Application screen.

Message

The system displays the message of the alert.

Actions on Alerts

You can indicate an action to be performed on the alert and click ‘Apply’ button to execute the action.

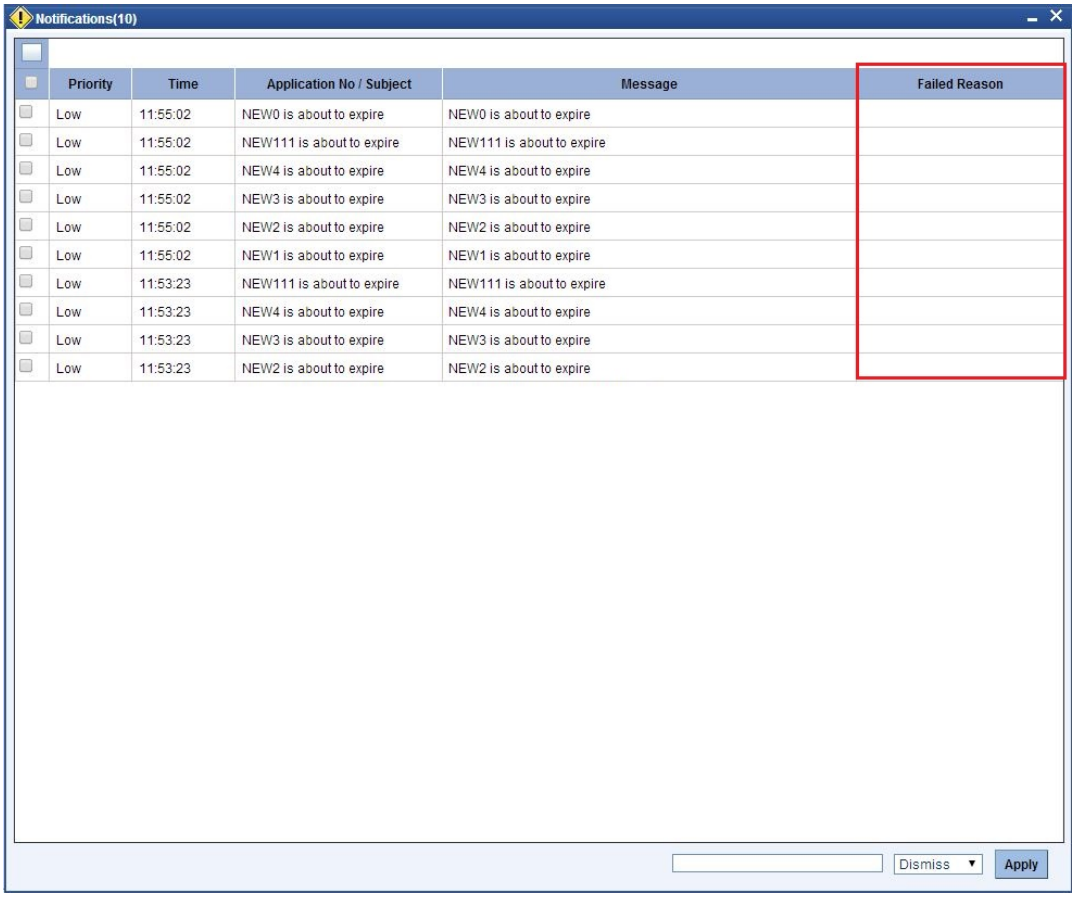
You can perform the following actions on alerts from the ‘Notifications’ screen.

Action	Description
Dismiss	Dismisses the alert
Notify	Invokes a separate ‘Notification’ screen, using which you can route the notification to the customer with subject, remarks, and mode of notification.
Reset	Invokes a screen using which you can reset the alert by setting a different reminder date and time.
Forward	Invokes a screen where you can select the user ID of your peer to whom the alert should be forwarded. You can only view and select the users who report to your manager.

If an action is successfully executed on an alert, then that alert will disappear from the list of alerts in the ‘Notification’ screen. You can view the status of the actions performed in the blown up notifications screen.

5.6.1 Blown Up Notifications

You can blow up the notification window to a full screen with enhanced view using the blow up button. The blow up button is the large square box provided at the top left corner of the 'Notifications' window.



This screen displays the details of the alerts in 'Notification' screen. In addition to that, you can also view the reason for failure of actions performed on the notifications.

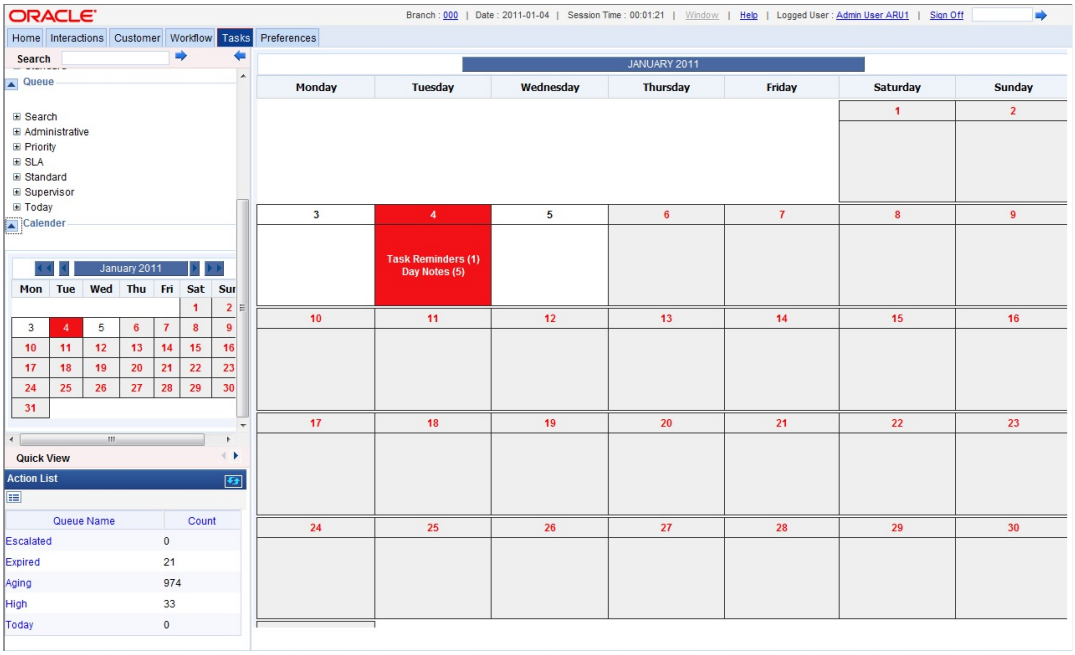
If the system fails to execute an action on an alert, then the reason for failure is displayed under column 'Failed Reason' against the respective alert.

If an action is successfully executed on an alert, then that alert will disappear from the list of alerts.

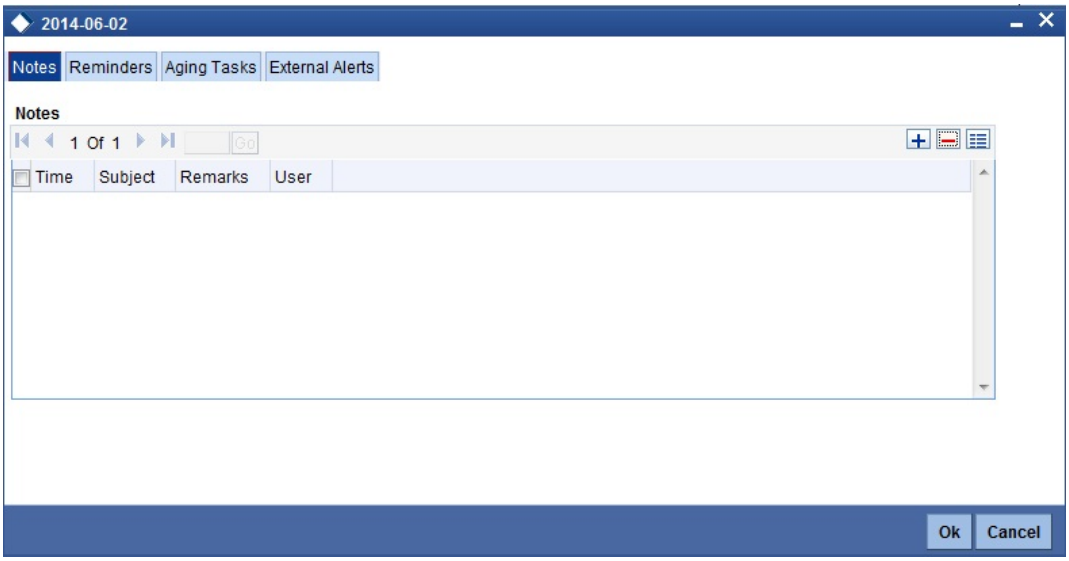
5.7 Viewing Notifications in Calendar

In the landing page of Oracle Banking Enterprise Limits and Collateral Management, you can view the calendar, which displays the number of alerts, task reminders, day notes, and aging tasks for a day.

From the landing page of Oracle Banking Enterprise Limits and Collateral Management, go to ‘Tasks’ and click ‘Calendar’ in the left pane. The system displays the calendar.



For a date, the system displays the number of task reminders, day notes, alerts, and aging tasks. Click a date to view the details. The system displays a screen that contains the details of the alerts.

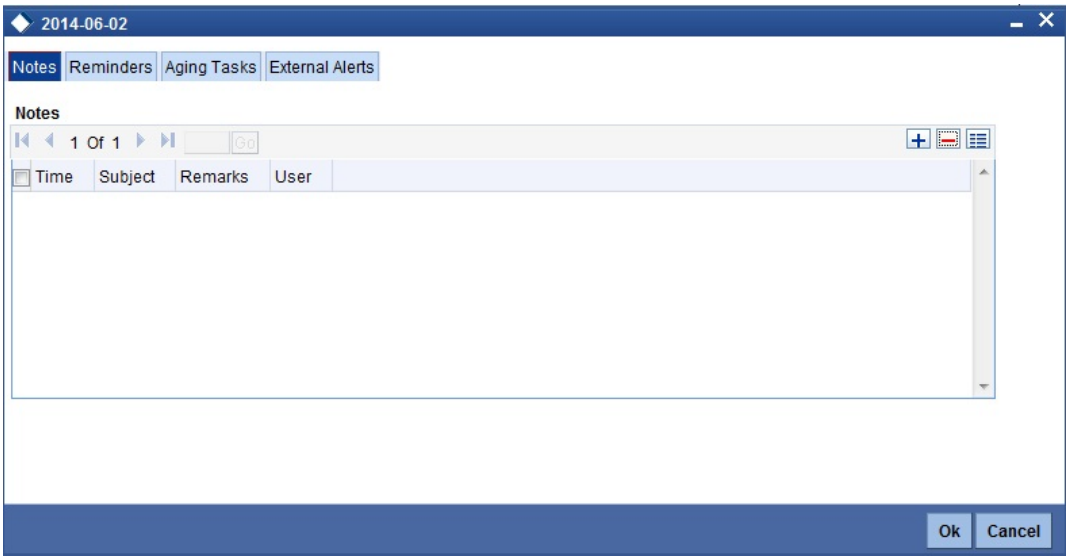


For a selected date, you can view the following details on this screen.

- Notes
- Reminders
- Aging tasks
- External alerts

5.7.1 Notes Tab

In the ‘Notes’ tab, you can view the notes captured for that date and also create new notes. Click ‘Notes’ tab.



You can view the details of the existing notes in the ‘Notes’ frame.

For creating new notes, click add button. The system displays an additional row. You can specify the following details in the new row.

Time

Specify the time. You can use this information to act upon the note being created.

Subject

Specify the subject of the note.

Remarks

Specify the complete remarks for the note.

User

Specify the user ID. By default the system displays the user ID of the user currently logged in. However, you can change this and select any of the peers and assign the note.

Only those users who report to the same manager are available for selection.

5.7.2 Reminders Tab

You can view the reminders in the ‘Reminders’ tab.

You can click ‘View’ button on this screen to view the details in the main screen.

5.7.3 Aging Tasks Tab

You can view the aging tasks in the ‘Aging Tasks’ tab.

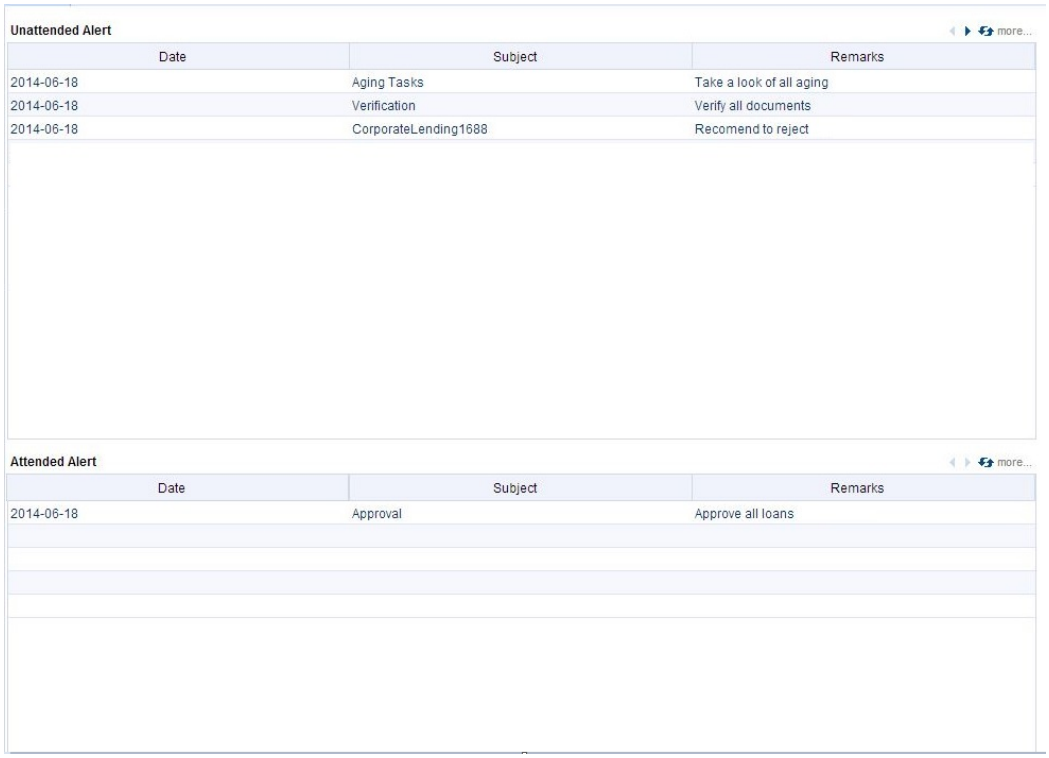
You can click ‘View’ button on this screen to view the details in the main screen.

5.7.4 External Alerts Tab

You can view the external alerts in the 'External Alerts' tab.

5.8 Alerts Dashboard

Under 'Interactions' tab, you can view the alerts that require your attention. Click 'Interactions' tab on the Application Browser.



You can view the following alerts in the dashboard.

Alert	Description
Attended alerts	Details of alerts on which some action is executed
Unattended alerts	Details of alerts on which actions are not executed
My alerts	Details of the alerts to which you (current user) have access rights
Expired alerts	Details of the alerts that are expired

6. Function ID Glossary

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ORDALRTM 5-1
ORDDSHMT 3-1
ORDDSHRL 3-4, 5-2
ORDUSRPF 5-3