

Priority Code Maintenance User Guide
Oracle Banking Trade Finance Process Management
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Oracle Banking Trade Finance Process Management - Priority Code Maintenance User Guide
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Priority Code Maintenance

Bank can set priorities for the transactions based on the Customer for each Process. If required, Bank can also modify, delete or view those maintained priorities.

The user can defined Priority Codes. The user also has facility to Create View and Update the priority code. There can be up to five Priority Codes.

This section contains the following topics:

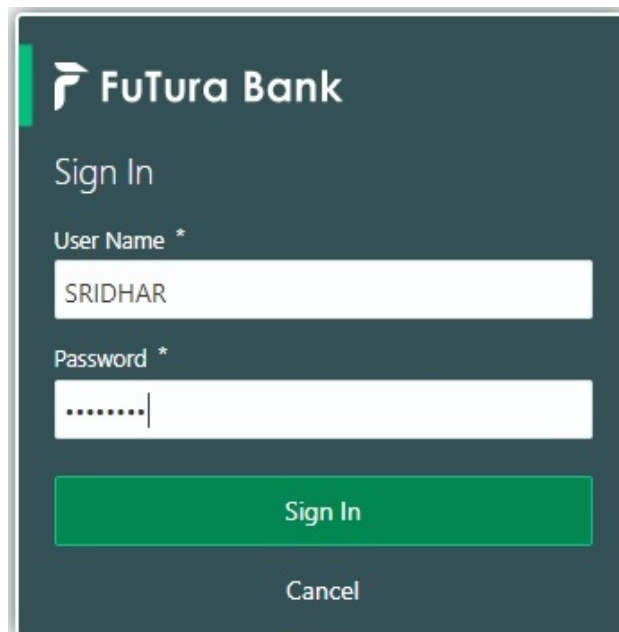
[Create Priority Code](#)

[View Priority Code Maintenance](#)

Create Priority Code

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

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



The screenshot shows a dark-themed login window for FuTura Bank. At the top left is the FuTura Bank logo. Below it, the text 'Sign In' is displayed. There are two input fields: 'User Name *' containing the text 'SRIDHAR' and 'Password *' containing masked characters. Below these fields are two buttons: a green 'Sign In' button and a white 'Cancel' button.

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

The screenshot shows the Oracle dashboard interface. The top navigation bar includes the Oracle logo, the word 'Dashboard', and user information for 'SRIDHAR01' (subham@gmail.com) at 'FLEXCUBE UNIVERSAL BAN...' on 'Jan 1, 2014'. The left sidebar lists menu items: Core Maintenance, Dashboard (selected), Maintenance, Security Management, Tasks, and Trade Finance. The main dashboard area contains several widgets:

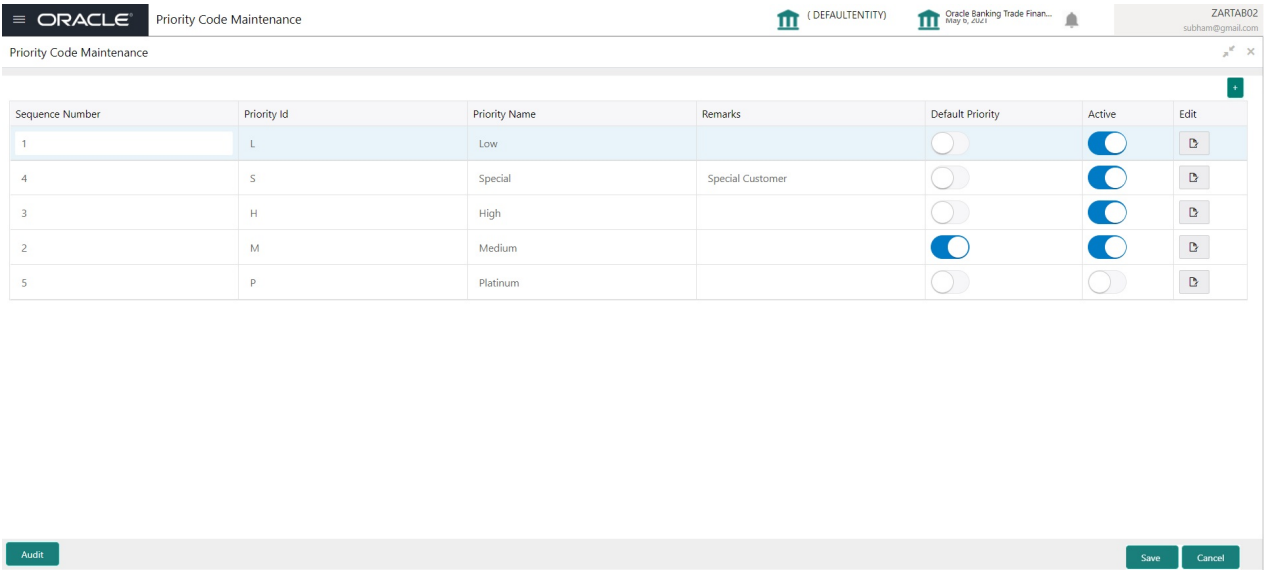
- High Value Transactions:** A bubble chart showing transaction values for GBP and EUR across a range of 0 to 12. The y-axis ranges from 0 to 120K.
- High Priority Tasks:** A table listing tasks with columns for Branch, Process Name, and Status. Tasks include 'Import Documentary Collections', 'Export LC Advising', and 'Export LC Advising'.
- Priority Summary:** A table with columns for Branch and Process Name, showing 'Export Documentary Collections-Update' for branch '000'.
- Pending Exception Approval:** A table with a search filter and columns for Customer Name, Stage Name, Process Reference Number, Process Name, Branch Name, and Currency. It lists 'Amount Block Exception Approval' and 'Limit Earmarking Exception Approval' for customer 'NA'.
- SLA Status Summary:** A summary widget with an 'Export Documentary Collections-Upd...' dropdown.

3. Click **Core Maintenance > Priority Code > Priority Code Maintenance**.

The screenshot shows the Oracle dashboard with the 'Core Maintenance' menu expanded. The top navigation bar shows '(DEFAULTTENITY)' and 'Oracle Banking Trade Finan...' on 'May 5, 2021'. The user is identified as 'ZARTAB02' (subham@gmail.com). The 'Core Maintenance' menu items are:

- Additional Field Maintenance
- Amount Text Language
- BIC Directory
- Checklists
- Currency Definition
- Currency Exchange Rate
- Currency Holiday Master
- Currency Pair Definition
- Currency Rate Type
- Customer Category
- ECA System
- External Bank Parameters
- External Branch Parameters
- External Customer
- Forget Process
- Local Holiday
- Media
- Priority Code
 - Customer Priority Maintenance
 - Priority Code Maintenance** (highlighted)

The **Priority Code Maintenance** screen appears.



4. Click **Plus** icon to add priority code.

Provide the field description based on the following table.

Field	Description
Sequence Number	<p>Read only field.</p> <p>System defaults the sequence number from 1 to 5, where Code 1 denotes the least priority and Code 5 denotes the highest priority.</p> <p>System allows the user to add a maximum of 5 sequence number and exceeding the same system should disable the + button. Maximum of 5 sequence number are allowed as a part of this maintenance screen.</p>
Priority Id	<p>Priority Id of the priority code.</p>
Priority Name	<p>Specify the priority name in which you like to have a priority against each Priority Code.</p> <p>Priority Name should be unique.</p>
Remarks	<p>Specify the priority description.</p>
Default Priority	<p>Enable the option, to mark any one Priority Code as the default Priority.</p> <p>One Priority Code has to be mandatorily marked as "Default Priority" code.</p> <p>If no default priority code is selected or more than one Priority Code is selected as Default Priority Code then System has to validate and display an error message.</p> <p>Default Priority Code will be populated in the Task under Priority field, if no Priority Code is maintained for the Customer of the Task.</p>

Field	Description
Active	<p>Enable the option, for the respective Priority code to be active.</p> <p>Only Active Priority Codes will be allowed for mapping in the “Customer Priority Code Maintenance” screen.</p> <p>User can disable a priority code, in such cases if there are any underlying active tasks in that priority code then system has to show a warning message saying “The existing active transactions in the disabled priority will be changed to the default priority”.</p> <p>At least one Priority Code has to be Active.</p>
Edit	Edit button to edit the records before save.

Action Buttons

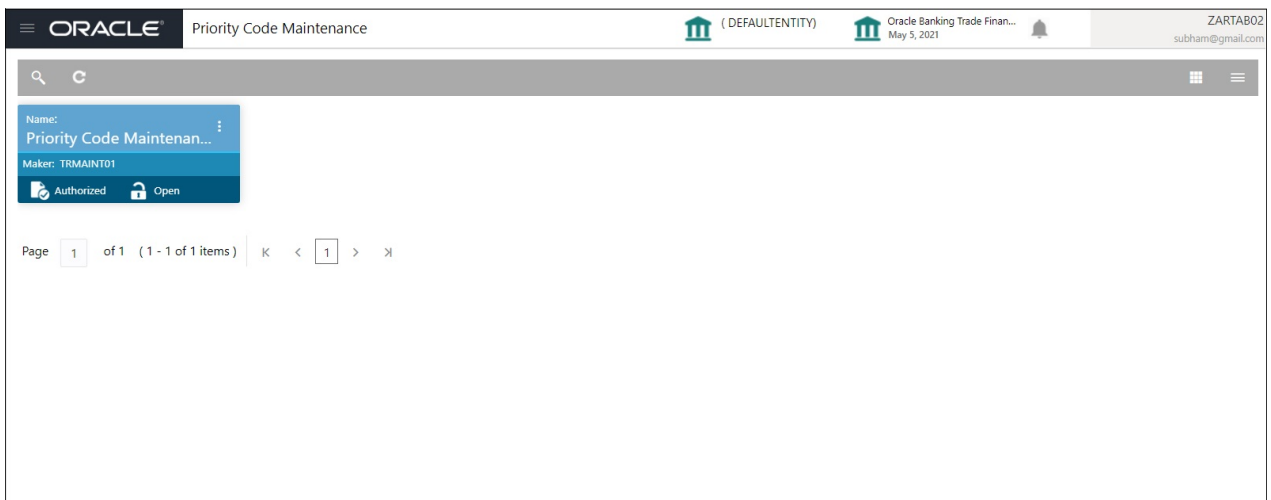
Field	Description
Save	Click to save the record.
Cancel	Click to cancel the record.

5. Click **Save** to save the record.

View Priority Code Maintenance


The user can view the record maintained in the “Priority Code Maintenance” screen as a single tile . The user can view the Priority Code 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 > Priority Code > Priority Code Maintenance**.

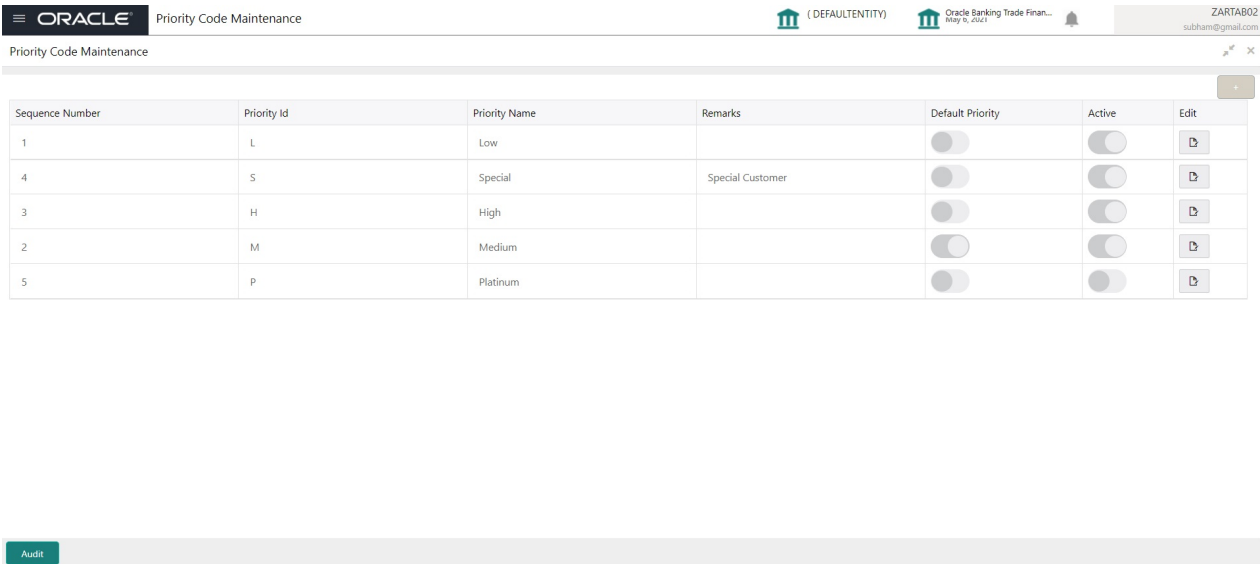


Field	Description
Priority Name	<p>System displays the priority name of the Priority Code.</p> <p>Priority Name is unique.</p>
Maker ID	System displays the maker ID.






Field	Description
Status	Displays the status of the record. Values are Authorized and Unauthorized.

2. Click the  icon, and then click **View** to view the Priority Maintenance in list form.

Viewing Priority Code Maintenance - List



The screenshot shows the Oracle Priority Code Maintenance interface. At the top, there is a navigation bar with the Oracle logo, the page title 'Priority Code Maintenance', and user information 'ZARTABO2 subham@gmail.com'. Below the navigation bar, there is a table with the following columns: Sequence Number, Priority Id, Priority Name, Remarks, Default Priority, Active, and Edit. The table contains five rows of data:

Sequence Number	Priority Id	Priority Name	Remarks	Default Priority	Active	Edit
1	L	Low		<input type="checkbox"/>	<input type="checkbox"/>	
4	S	Special	Special Customer	<input type="checkbox"/>	<input type="checkbox"/>	
3	H	High		<input type="checkbox"/>	<input type="checkbox"/>	
2	M	Medium		<input type="checkbox"/>	<input type="checkbox"/>	
5	P	Platinum		<input type="checkbox"/>	<input type="checkbox"/>	

Below the table, there is an 'Audit' button.

Audit

Maker

 OBTFFM09

 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.

Field	Description
Status	<p data-bbox="580 259 1294 322">Displays the status of the record. Values are Authorized and Unauthorized.</p> <ul data-bbox="609 340 1270 412" style="list-style-type: none"><li data-bbox="609 340 1270 371">• Un-authorized Record – View, Unlock and Authorize.<li data-bbox="609 383 1051 412">• Authorized Record – View, Unlock

A

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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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