

Project Management User Guide

Oracle Banking Credit Facilities Process Management

Release 14.7.2.0.0

Part No. F91681-01

December 2023

ORACLE[®]
Financial Services

Oracle Banking Credit Facilities Process Management User Guide
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Table of Contents

| | |
|---|----|
| Preface | 1 |
| <i>About this guide</i> | 1 |
| <i>Intended Audience</i> | 1 |
| <i>Conventions Used</i> | 1 |
| <i>Common Icons in OBCFPM</i> | 2 |
| Project Management Process | 3 |
| Enrichment | 4 |
| <i>Project Summary</i> | 6 |
| <i>Adding Project Details</i> | 7 |
| <i>Adding Stakeholder Information</i> | 12 |
| <i>Adding Project Milestone</i> | 14 |
| <i>Comments</i> | 15 |
| Amendment Approval | 17 |
| <i>Project Summary</i> | 18 |
| <i>Comments</i> | 20 |
| Reference and Feedback | 23 |
| <i>References</i> | 23 |
| <i>Feedback and Support</i> | 23 |

Chapter 1 - Introduction

Preface

About this guide

This guide helps you to quickly get familiarized with the Project Management process in OBCFPM for managing customer projects.

Intended Audience

This document is intended for the banking personnel, such as Relationship Manager, responsible for managing customers information.

Conventions Used

The following table lists the conventions that are used in this document:

| Convention | Description |
|---|---|
| Italic | Italic denotes a screen name |
| Bold | Bold indicates <ul style="list-style-type: none">• Field name• Drop down options• Other UX labels |
|  | This icon indicates a note |
|  | This icon indicates a tip |
|  | This icon indicates a warning |

Chapter 1 - Introduction

Common Icons in OBCFPM

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

| Icons | Icon Name |
|---|-------------------------------|
|  | Add icon |
|  | Calendar icon |
|  | Configuration / settings icon |
|  | Delete icon |
|  | Edit icon |

Chapter 3 - Overview

Project Management Process

The Project Management Process in OBCFPM is a simple two stage process which allows you to record customer's project information with ease. Whenever there is an update in the project, you can add / modify the project information with respect to the new updates.

The two stages available in Project Management process are:

- Enrichment
- Approval

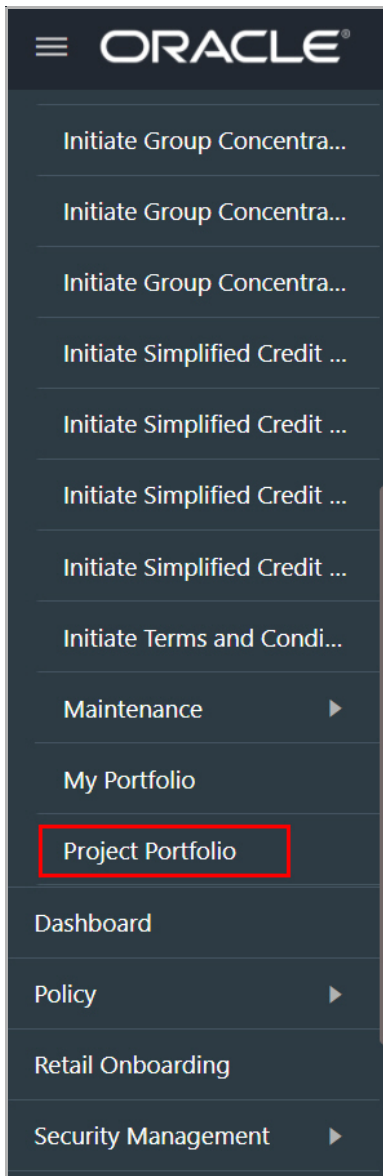
Chapter 3 - Enrichment

Enrichment

In this stage, you can capture all the details about the customer project, project stakeholders and project milestones.

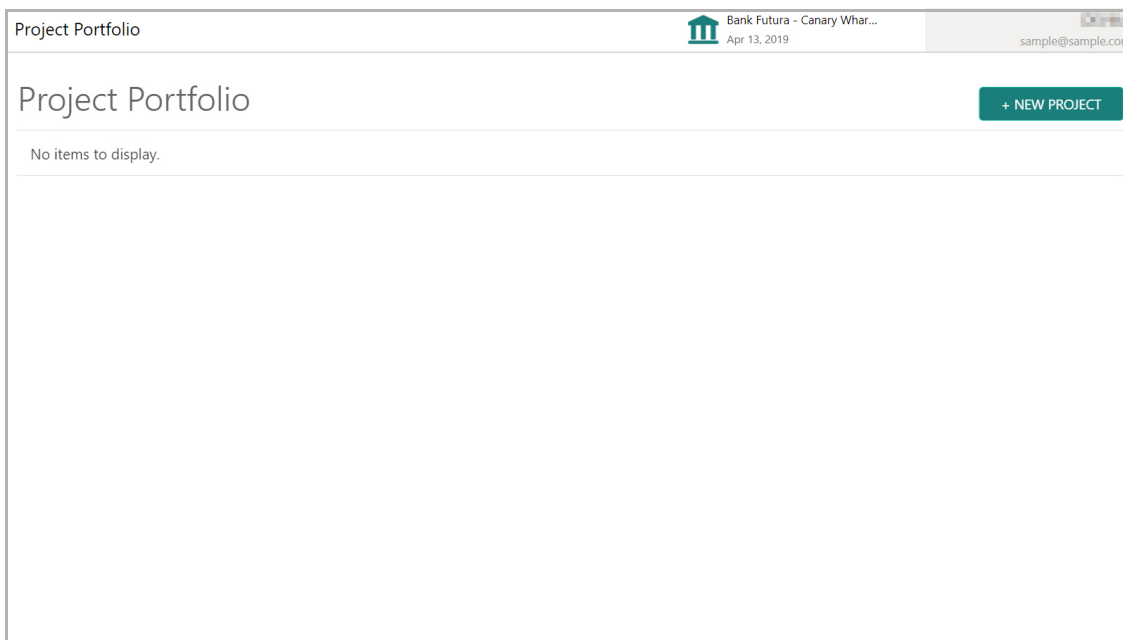
Enrichment Steps

1. Login to OBCFPM.

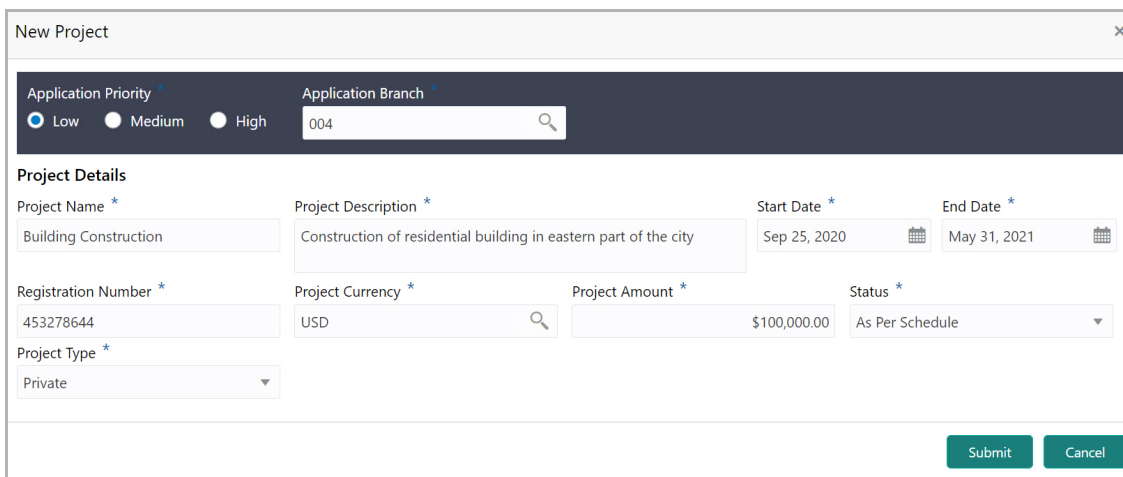


Chapter 3 - Enrichment

2. Navigate to **Credit Facilities > Project Portfolio** from the left menu. The *Project Portfolio* page appears:



3. Click **+NEW PROJECT**. The *New Project* window appears:



4. Choose the project **Application Priority**. The options available are: Low, Medium, and High.

5. Search and select the project **Application Branch**.

Project Details

6. Type your customer's **Project Name**.

7. Type a detailed description for project in the **Project Description** field.

8. Click the calendar icon and select **Start Date** and **End Date** of the project.

Chapter 3 - Enrichment

9. Specify the project **Registration Number**.
10. Search and select the **Project Currency**.
11. Specify the budget of project in the **Project Amount** field.
12. Select the project **Status** from the drop down list. The options available are:
 - As Per Schedule
 - Ahead of Schedule
 - Behind Schedule
 - Yet to Start
 - Complete
13. Select the **Project Type** from the drop down list. The options available are:
 - Govt
 - Private
 - Public Private Partnership
 - Mixed
14. Specify the **Point of Contact Name** for the project.
15. Click **Submit**. The *Enrichment - Project Summary* page appears.

Project Summary

The *Project Summary* page has the following widgets to add corresponding details:

- Project Details
- Project Stakeholders
- Timelines

Chapter 3 - Enrichment

The screenshot displays the 'Project Definition - Enrichment' window. At the top, there are two tabs: 'Project Summary' (active, marked with a blue circle '1') and 'Comments' (marked with a blue circle '2'). The 'Project Summary' section shows the project title 'Building Construction' and a brief description: 'Construction of residential building in eastern part of the city' with a 'Read More' link. Below this is a table with project metadata:

| Registration Number | Project Type | Project Currency | Project Amount |
|---------------------|--------------|------------------|----------------|
| 453278644 | Private | USD | \$100.00K |

The interface is divided into three main content areas:

- Project Details:** A large empty box with the text 'No Project details are added' and a green 'Add Project Details' button.
- Project Stakeholders:** A large empty box with the text 'No Stakeholders are added' and a green 'Add Stakeholder' button.
- Timelines:** A section with a 'Status' dropdown menu set to 'All' and a 'Start Date' field set to 'Jul 23, 2020'. Below this is the text 'No Timelines are added' and a green 'Add Milestone' button.

At the bottom right of the window, there is a navigation bar with buttons: 'Hold', 'Back', 'Next', 'Save & Close', and 'Cancel'.

Adding Project Details

16. Click **Add Project Details** in the **Project Details** widget. The *Project Details* window appears:

Chapter 3 - Enrichment

Project Details

| | | | |
|-------------------------|-----------------------|--|---|
| Project Name * | Registration Number * | Project Description * | |
| Building Construction | 453278644 | Construction of residential building in eastern part of the city | |
| Project Currency * | Project Amount * | Status * | Project Type * |
| USD | \$100,000.00 | As Per Schedule | Private |
| Start Date * | End Date * | Project Objective * | |
| Sep 24, 2020 | May 30, 2021 | To develop eastern part of the city | |
| Point of Contact Name * | Phone Number * | Email * | |
| John | 9876543210 | John@xyz.com | |
| Customer sector | | | +Add Industry |
| No Sectors Added | | | |
| Address | | | |
| + [edit] [delete] | | | |
| No items to display. | | | |
| | | | Save Cancel |



In edit mode, **Update** option appears in the **Project Details** widget instead of **Add Project Details**. Click on **Update** to modify the project details.

In the above screen, the following details are automatically populated based on the information added in the *New Project* window:

- Project Name
- Registration Number
- Project Description
- Project Currency
- Project Amount
- Status
- Project Type
- Start Date
- End Date

Chapter 3 - Enrichment

You can modify the following details, if required:

- Project Currency
- Project Amount
- Status
- Project Type
- Start Date
- End Date

17. Type the **Project Objective**. The maximum character limit for the project objective is 450.

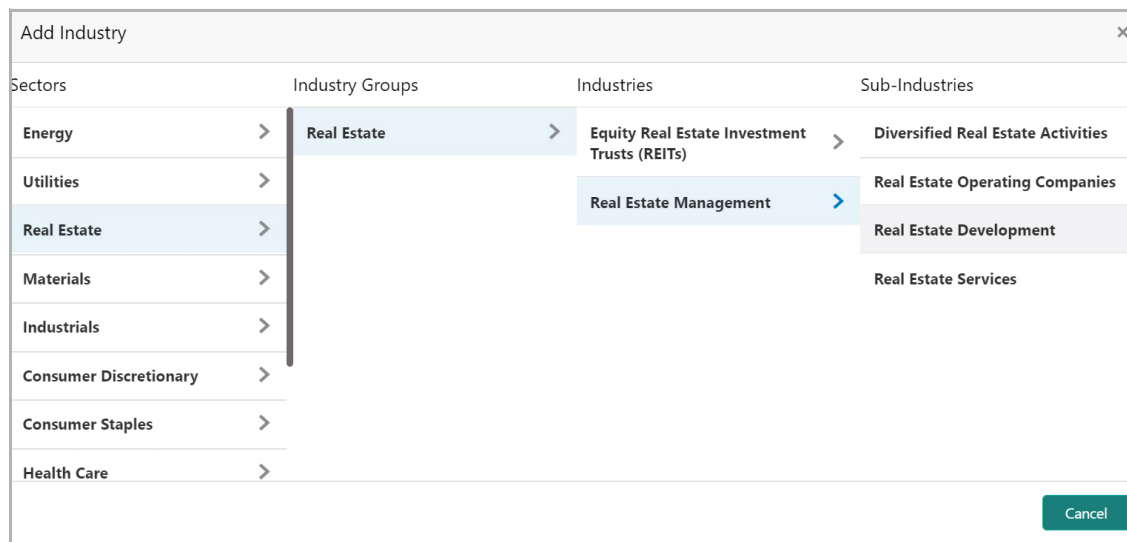
18. Type the **Point of Contact Name** for the project. The maximum character limit for the point of contact name is 35.

19. Specify the **Phone Number** of the point of contact person.

20. Type the **Email** address of the point of contact person.

Customer sector

21. To add the project's industry details, click **+Add Industry**. The *Add Industry* window appears:



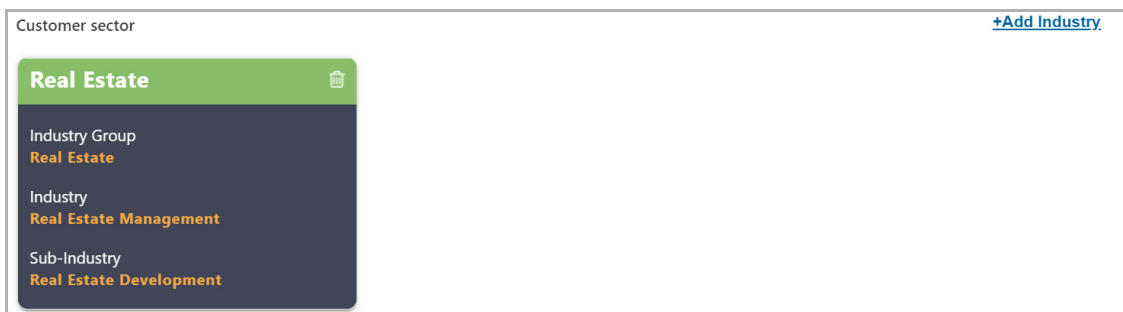
22. Select the project **Sector**. **Industry Groups** list is displayed.

23. Select the project Industry Group. **Industries list** is displayed.

24. Select the project Industry. **Sub-Industries** list is displayed.

Chapter 3 - Enrichment

25. Select the project Sub-Industry. Industry details are added and displayed in the **Customer Sector** section as shown below:



The screenshot shows a 'Customer sector' window with a '+Add Industry' link in the top right. A dark blue card displays the following details:

- Real Estate** (with a delete icon)
- Industry Group: **Real Estate**
- Industry: **Real Estate Management**
- Sub-Industry: **Real Estate Development**

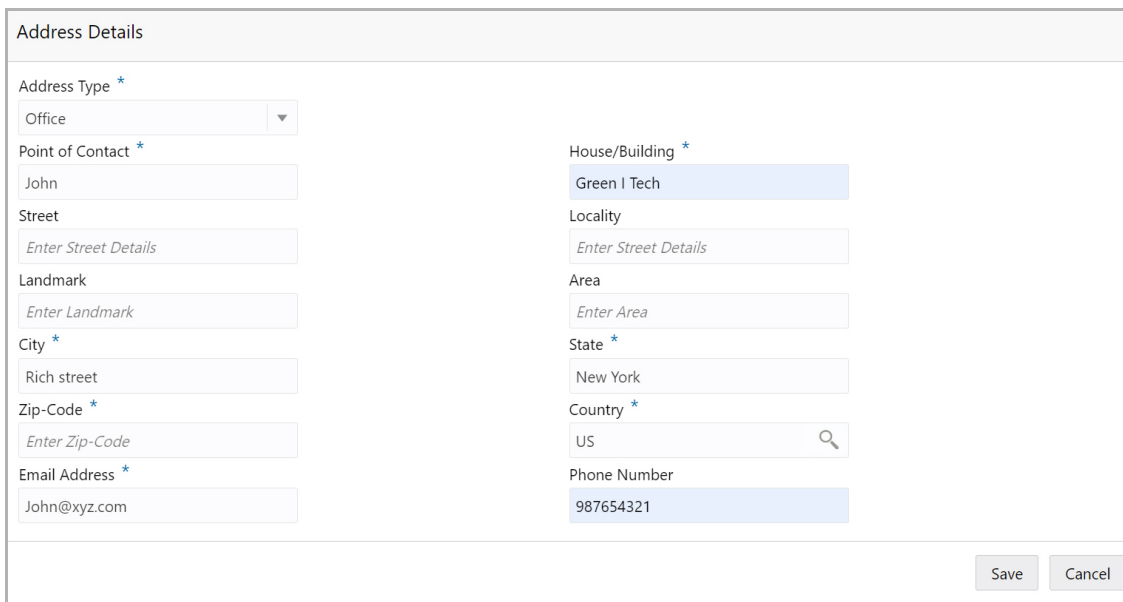
26. To delete the added sector information, click the delete icon.

Address

In the Address Details window, you can add the following types of address for the project:

- Office
- Residence
- Correspondence

27. Click the Add icon, the *Address Details* window appears:



The 'Address Details' window contains the following fields:

| | |
|--------------------|----------------------|
| Address Type * | Office |
| Point of Contact * | John |
| Street | Enter Street Details |
| Landmark | Enter Landmark |
| City * | Rich street |
| Zip-Code * | Enter Zip-Code |
| Email Address * | John@xyz.com |
| House/Building * | Green I Tech |
| Locality | Enter Street Details |
| Area | Enter Area |
| State * | New York |
| Country * | US |
| Phone Number | 987654321 |

Buttons: Save, Cancel

28. Select the required **Address Type**.

29. Type the name of **Point of Contact** person for the selected address.

Chapter 3 - Enrichment

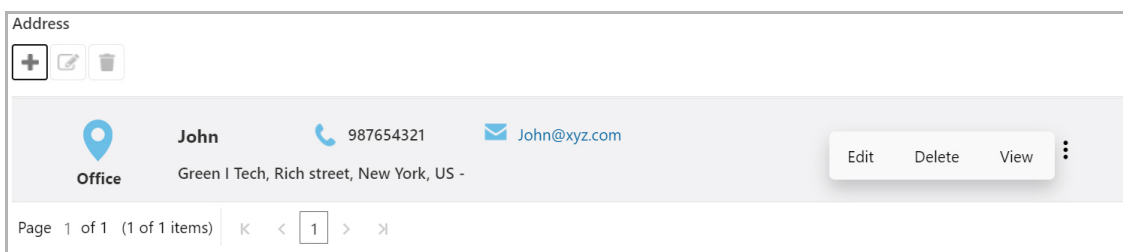
30. Type / select the following address details:

- **House/Building** name
- **Street** name
- **Locality**
- **Landmark**
- **Area**
- **City**
- **State**
- **Zip-Code**
- **Country**

31. Type the **Email Address** of the point of contact person.

32. Specify the **Phone Number** of the point of contact person.

33. Click **Save**. The address details are added and displayed as shown below:



34. To **Edit**, **Delete**, and **View** the address, select the corresponding record and click the required option.

35. To save the project details, click **Save** in the *Project Details* window.

Chapter 3 - Enrichment

Adding Stakeholder Information

36. Click **Add Stakeholder** in the **Project Stakeholder** widget. The *Add Stakeholder* window appears:

The screenshot shows the 'Add Stakeholder' dialog box. It includes a 'Customer Details' section with 'New' and 'Existing' radio buttons, and a 'Customer ID' search field containing '000006'. Below this are four rows of input fields: 'Type' (dropdown menu showing 'Customer'), 'Name' (text field with 'COS'), 'Registration Number' (text field with '999765366'), and 'Company Type' (dropdown menu showing 'Pvt Ltd'). The next row contains 'Date of Incorporation' (calendar icon, 'May 28, 2014'), 'Demography Type' (dropdown menu showing 'Domestic'), 'Place of Incorporation' (text field with 'IN' and search icon), and 'No of Companies' (text field with '1'). Below these is an 'Address' section with three icons (+, edit, delete) and a message 'No items to display.' At the bottom right are 'Save' and 'Cancel' buttons.

37. If the stakeholder is not your bank's customer, select **Customer Details** as 'New'.

38. If the stakeholder is already a customer in your bank, select **Customer Details** as 'Existing'. The **Customer ID** field appears.

39. Search and select the required **Customer ID**.

40. Select the **Type** of stakeholder from the drop down list. The options available include but are not limited to: Customer, Sponsor, Equity Investor, Shareholder, and Financial Advisor.

41. Type the **Name** of the stakeholder.

42. Specify the stakeholder's **Registration Number**.

43. Select the stakeholder's **Company Type**. The options available are:

- Proprietorship
- Pvt Ltd
- Public Limited
- Govt Owned
- Trusts
- Others
- Society
- Associations
- Limited Liability Partnership
- Foreign Bodies
- NGO
- Clubs

Chapter 3 - Enrichment

44. Click the Calendar icon and search the **Date of Incorporation**.
45. Select the stakeholder's Demography Type from the drop down list. The options available are:
 - Domestic
 - Global

If the **Demography Type** is selected as 'Global', the **Geographical Spread** field appears.

46. Click and select the countries in which the stakeholder is operating.
47. Search and select the stakeholder's **Place of Incorporation**.
48. Specify the **No of Companies** associated with the stakeholder.

Address

For information on adding stakeholder's address, refer "[Address](#)" on page 10.

49. To save the stakeholder information, click **Save** in the *Add Stakeholder* window. Stakeholder details are listed in the *Project Summary* page as shown below:

The screenshot displays the 'Project Summary' page. At the top, it shows 'Building Construction' with a description: 'Construction of residential building in eastern part of the city [Read More](#)'. Below this, a table lists project details: Registration Number (453278644), Project Type (Private), Project Currency (USD), and Project Amount (\$100.00K). The page is divided into two main sections: 'Project Details' and 'Project Stakeholders'. The 'Project Details' section includes 'Project Objective' (To develop eastern part of the city [Read More](#)), 'Sectors' (Real Estate), and 'Point of Contact' (John, with phone number 9876543210 and email john@xyz.com). The 'Project Stakeholders' section shows '1 Total No of Stakeholders' and a table with one entry: 'COS' (Registration Number: 999765366, Company Type: Pvt Ltd, Date of Incorporation: May 28, 2014). This entry has 'Edit', 'Delete', and 'View' options, and is marked as 'CUSTOMER'. At the bottom, there are buttons for 'Hold', 'Back', 'Next', 'Save & Close', and 'Cancel'.

50. To **Edit, Delete** or **View** the stakeholder information, select the corresponding record from the list and click the required option.



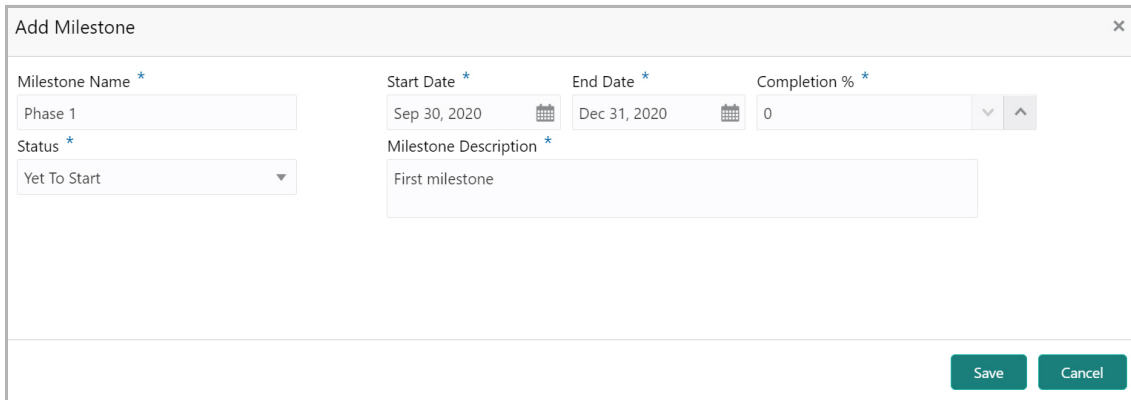
To link a project with a facility in credit proposal application, the existing customer option must be selected and the required party must be linked while adding the stakeholder details. Then, this project Id must be selected in the Facility details window in the Credit Proposal application.

Chapter 3 - Enrichment

Adding Project Milestone

Project milestones are important achievements in a project during the project life cycle. You can add the already completed milestone, current milestone as well as future milestone in the **Timeline** widget.

51. Click **Add Milestone** in the **Timelines** widget. The *Add Milestone* window appears:



52. Type the **Milestone Name**.
53. Click the calendar icon and select the **Start Date** and **End Date** for the milestone. Start Date and End Date can be past or future dates.
54. Specify the **Completion %** for the milestone.
55. Select the project milestone **Status** from the drop down list.

If future date is selected as Start Date and End Date, the completion % must be 0 and the Status must be Yet To Start.

56. Type the **Milestone Description**.
57. Click **Save**. Milestone details are added in the **Timelines** widget as shown below:



58. To filter a milestone from the Timeline, select the required **Status** and **Start Date**.
59. To go to the *Comments* page, click **Next**.

Chapter 3 - Enrichment

Comments

The comments page allows you to capture overall comments for this stage. Adding comments for a stage helps others to identify the actions performed in that stage.

Project Definition - Enrichment

Project Summary

Comments

Comments

Enter text here...

Post

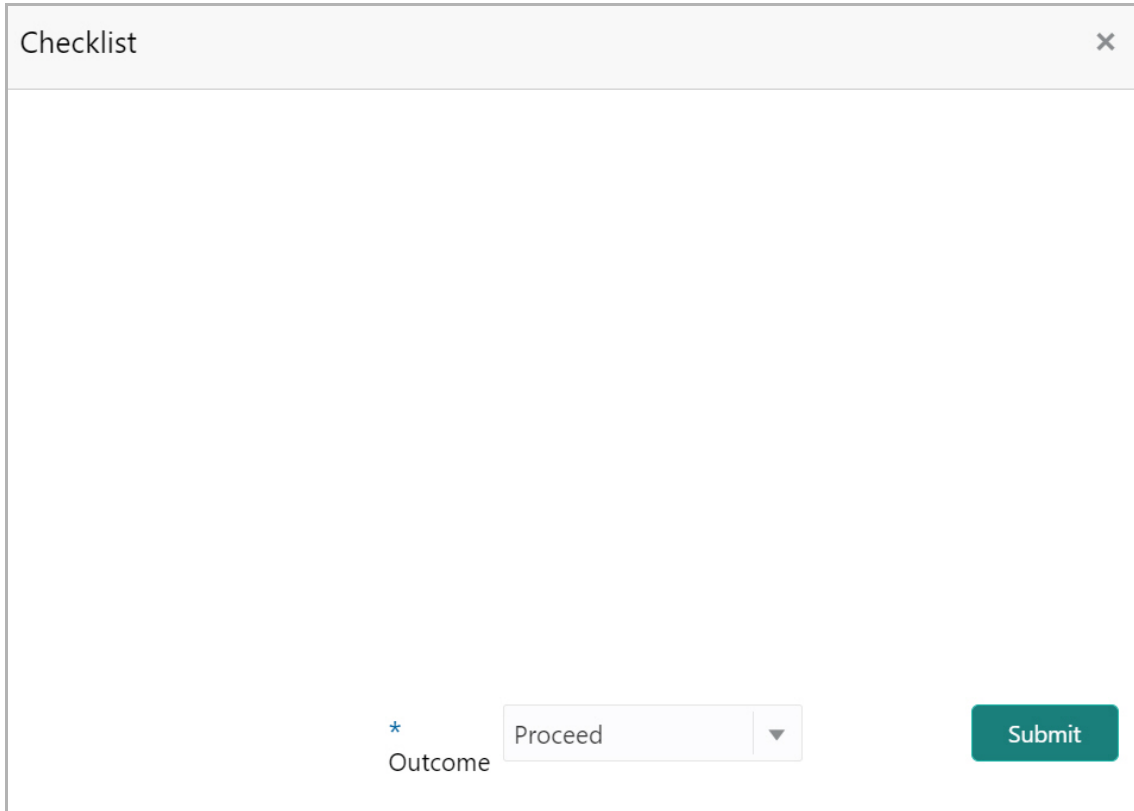
No items to display.

Hold Back Next Save & Close Submit Cancel

60. Type Comments, if required.
61. Click **Post**. Comments are posted below the **Comments** text box.
62. To hold the Process Management process, click **Hold**.
63. To go back to the previous page, click **Back**.
64. To save and exit the window, click **Save & Close**.
65. To submit the Enrichment task to the Approval stage, click **Submit**.
66. To exit the window without saving the information, click **Cancel**.

Chapter 3 - Enrichment

Upon clicking **Submit**, the *Checklist* window appears:



The screenshot shows a window titled "Checklist" with a close button (X) in the top right corner. The main area of the window is empty. At the bottom, there is a label "Outcome" with an asterisk (*) above it. To the right of the label is a dropdown menu with "Proceed" selected. Further to the right is a green "Submit" button.

67. Select the **Outcome** as 'Proceed'.
68. Click **Submit**. The task is moved to the Approval stage.

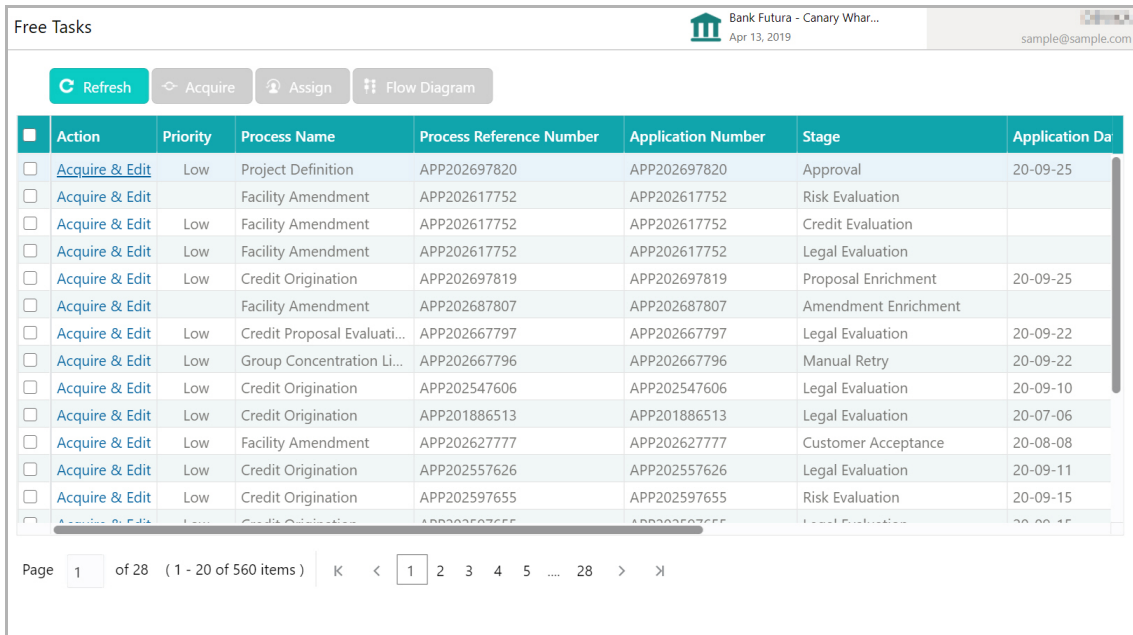
Chapter 3 - Approval

Amendment Approval

In this stage, the Approver can view the project summary and take necessary actions such as approve or send back the project management application.

Approval Steps

1. In OBCFPM, navigate to **Tasks > Free Tasks** from the left navigation menu. The *Free Tasks* page appears:



| Action | Priority | Process Name | Process Reference Number | Application Number | Stage | Application Date |
|------------------------------------|----------|-----------------------------|--------------------------|--------------------|----------------------|------------------|
| Acquire & Edit | Low | Project Definition | APP202697820 | APP202697820 | Approval | 20-09-25 |
| Acquire & Edit | | Facility Amendment | APP202617752 | APP202617752 | Risk Evaluation | |
| Acquire & Edit | Low | Facility Amendment | APP202617752 | APP202617752 | Credit Evaluation | |
| Acquire & Edit | Low | Facility Amendment | APP202617752 | APP202617752 | Legal Evaluation | |
| Acquire & Edit | Low | Credit Origination | APP202697819 | APP202697819 | Proposal Enrichment | 20-09-25 |
| Acquire & Edit | | Facility Amendment | APP202687807 | APP202687807 | Amendment Enrichment | |
| Acquire & Edit | Low | Credit Proposal Evaluati... | APP202667797 | APP202667797 | Legal Evaluation | 20-09-22 |
| Acquire & Edit | Low | Group Concentration Li... | APP202667796 | APP202667796 | Manual Retry | 20-09-22 |
| Acquire & Edit | Low | Credit Origination | APP202547606 | APP202547606 | Legal Evaluation | 20-09-10 |
| Acquire & Edit | Low | Credit Origination | APP201886513 | APP201886513 | Legal Evaluation | 20-07-06 |
| Acquire & Edit | Low | Facility Amendment | APP202627777 | APP202627777 | Customer Acceptance | 20-08-08 |
| Acquire & Edit | Low | Credit Origination | APP202557626 | APP202557626 | Legal Evaluation | 20-09-11 |
| Acquire & Edit | Low | Credit Origination | APP202597655 | APP202597655 | Risk Evaluation | 20-09-15 |
| Acquire & Edit | Low | Credit Origination | APP202597655 | APP202597655 | Risk Evaluation | 20-09-15 |

2. **Acquire & Edit** the required 'Approval' task. The *Approval - Project Summary* page appears.

Chapter 3 - Approval

Project Summary

The Project Summary page displays all the project related information added in the 'Enrichment' stage.

The screenshot displays the 'Project Definition - Approval' page. At the top, there are two tabs: 'Project Summary' (active) and 'Comments'. The main content area is divided into several sections:

- Project Summary:** Displays 'Building Construction' with a sub-description 'Construction of residential building in eastern part of the city' and a 'Read More' link. Below this is a table with project metadata:

| Registration Number | Project Type | Project Currency | Project Amount |
|---------------------|--------------|------------------|----------------|
| 453278644 | Private | USD | \$100.00K |
- Project Details:** Includes 'Project Objective' (To develop eastern part of the city), 'Sectors' (Real Estate), and 'Point of Contact' (John, 9876543210, John@xyz.com, Office at Green I Tech, Rich street, New York, US-).
- Project Stakeholders:** Shows 'Total No of Stakeholders' as 1. A table lists stakeholder 'COS' with details: Registration Number (999765366), Company Type (Pvt Ltd), Date of Incorporation (May 28, 2014), and Demography Type (Domestic). A 'CUSTOMER' tag is visible.
- Timelines:** Features a calendar view for 2020 and 2021. A 'Phase 1' milestone is shown as a bar spanning from late 2020 to early 2021. Filters for 'Status' (All) and 'Start Date' (Jul 22, 2020) are present.
- Project Summary (Bottom):** A table showing financial limits:

| Existing Limit |
|-------------------|
| \$13.18M |
| Outstanding Limit |
| \$13.18M |

At the bottom right, there are navigation buttons: 'Hold', 'Back', 'Next', 'Save & Close', and 'Cancel'.

3. To view full Project Description and Project Objective, click **Read More** in **Project Summary** and **Project Details** widget.

4. To view the stakeholder details, click the Hamburger icon in corresponding record in the **Project Stakeholders** widget and select **View**.

5. To filter a milestone from the Timeline, select the required **Status** and **Start Date**.

6. To view the Project Aggregation, click **View All** in the **Project Summary** tile. The following window appears:

Chapter 3 - Approval

Project Aggregation ✕

Customer Name : ██████████ INDUSTRIES LTD (MHI)

| Project Id | Project Name | Existing Limit | Outstanding Limit |
|------------|------------------------|----------------|-------------------|
| 461 | Dubai Metro (Phase II) | \$16.09M | \$16.09M |

Cancel

7. To view the facility details, click on the Project Id. The following window appears:

Facility Details ✕

| Facility Id | Line Number | Product Type | Facility Description | Existing Limit | Outstanding Limit | Next Rev |
|-------------|-------------|--------------|--|----------------|-------------------|----------|
| 90019721 | 0011150131 | NF | Project Specific Limit -Dubai Metro (Phase - II) | AED13.18M | AED13.18M | |

< >

8. After viewing the Project Summary, click **Next**. The *Comments* page appears.

Chapter 3 - Approval

Comments

The comments page allows you to capture overall comments for this stage. Adding comments for a stage helps others to identify the actions performed in that stage.

Project Definition - Approval

Project Summary

Comments

Comments

Enter text here...

Post

No items to display.

Hold Back Next Save & Close Submit Cancel

9. Type Comments, if required.
10. Click **Post**. Comments are posted below the **Comments** text box.
11. To hold the Process Management process, click **Hold**.
12. To go back to the previous page, click **Back**.
13. To save and exit the window, click **Save & Close**.
14. To submit the Approval task, click **Submit**.
15. To exit the window without saving the information, click **Cancel**.

Chapter 3 - Approval

Upon clicking **Submit**, the *Checklist* window appears:

Checklist

* Outcome

16. Select the required **Outcome**. The options available are Proceed and Additional Info.

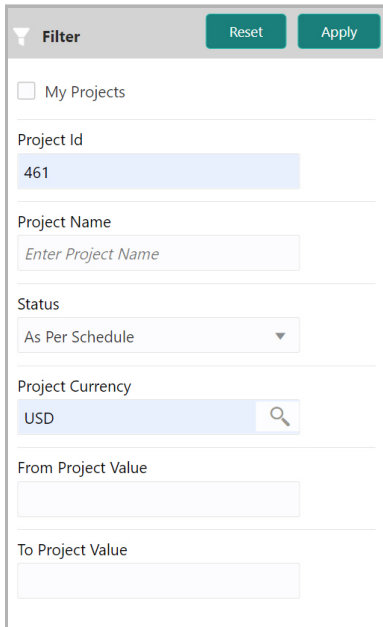
17. Click **Submit**.

If the **Outcome** is selected as 'Proceed', the Project Management process is completed and the project details are listed in *Project Portfolio* page as shown below.

| Project Name | Status | Project ID | End Date | Registration Number | Project Value | Start Date | Actions |
|----------------------|-------------------|-----------------|--------------|---------------------|----------------|--------------|------------|
| Border road creation | Ahead Of Schedule | PRJ202010041066 | Aug 30, 2022 | REG65465465685 | \$200,000.00 | Nov 29, 2019 | Edit, View |
| | As Per Schedule | PRJ202010161087 | Oct 13, 2021 | 123456 | \$1,000,000.00 | Oct 14, 2020 | |
| XYZ Towers | Yet To Start | PRJ202010271106 | Oct 23, 2024 | REG00949 | \$5,000,000.00 | Oct 26, 2020 | |

18. To filter a specific project record, click the **Filter** icon.

Chapter 3 - Approval

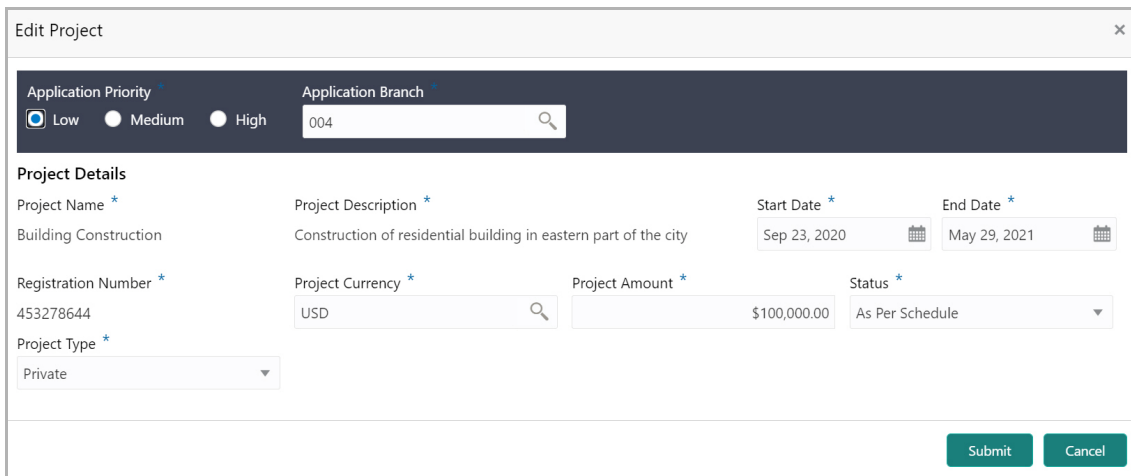


The filter form includes a 'Filter' header with 'Reset' and 'Apply' buttons. It contains several input fields: a checkbox for 'My Projects', a 'Project Id' field with the value '461', a 'Project Name' field with a placeholder 'Enter Project Name', a 'Status' dropdown menu set to 'As Per Schedule', a 'Project Currency' field with 'USD' and a search icon, and two empty text boxes for 'From Project Value' and 'To Project Value'.

19. Specify the filter parameters and click **Apply**.

20. To **Edit** or **View** the project details, click the Hamburger icon in the corresponding record and select the required option.

Upon clicking **Edit** in the above screen, the *Edit Project* window appears:



The 'Edit Project' window features a dark header with 'Application Priority' (radio buttons for Low, Medium, High) and 'Application Branch' (input field with '004'). Below is the 'Project Details' section with fields for: Project Name (Building Construction), Project Description (Construction of residential building in eastern part of the city), Start Date (Sep 23, 2020), End Date (May 29, 2021), Registration Number (453278644), Project Currency (USD), Project Amount (\$100,000.00), Status (As Per Schedule), and Project Type (Private). 'Submit' and 'Cancel' buttons are at the bottom right.

21. Modify the project details, if required.

22. Click **Submit**. The *Enrichment - Project Summary* page appears.

For information on modifying, adding, deleting project details, project stakeholders, and project milestone, refer the **Enrichment** chapter.

If the **Outcome** is selected as 'Additional Info', the system will create 'Enrichment' task. The user who initiated the process must add necessary project details and send the task for Approval again.

Chapter 3 - Reference and Feedback

Reference and Feedback

References

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
- Oracle Banking Credit Facilities Process Management Installation Guides

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