

Project Management User Guide

Oracle Banking Credit Facilities Process Management Cloud Service

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Oracle Banking Credit Facilities Process Management Cloud Service User Guide
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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

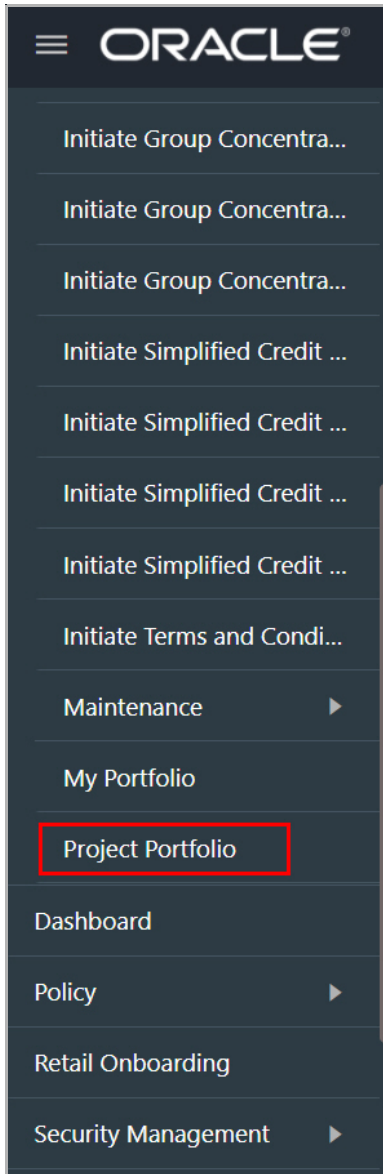
Chapter 3 - Enrichment

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

Project Definition - Enrichment

1

Project Summary

2

Comments

Project Summary

Building Construction

Construction of residential building in eastern part of the city [Read More](#)

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

Project Details

No Project details are added

Add Project Details

Project Stakeholders

No Stakeholders are added

Add Stakeholder

Timelines

Status

All

Start Date

Jul 23, 2020

No Timelines are added

Add Milestone

Hold

Back

Next

Save & Close

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 *

Building Construction

Registration Number *

453278644

Project Description *

Construction of residential building in eastern part of the city

Project Currency *

USD

Project Amount *

\$100,000.00

Status *

As Per Schedule

Project Type *

Private

Start Date *

Sep 24, 2020

End Date *

May 30, 2021

Project Objective *

To develop eastern part of the city

Point of Contact Name *

John

Phone Number *

9876543210

Email *

John@xyz.com

Customer sector

+Add Industry

No Sectors Added

Address

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:

The 'Add Industry' window displays a hierarchical selection process for industry details. It is organized into four columns: Sectors, Industry Groups, Industries, and Sub-Industries. The 'Sectors' column lists various industry categories. The 'Industry Groups' column shows sub-categories under the selected sector. The 'Industries' column shows specific industry types under the selected group. The 'Sub-Industries' column shows further details under the selected industry. A 'Cancel' button is located at the bottom right.

Sectors	Industry Groups	Industries	Sub-Industries
Energy	Real Estate	Equity Real Estate Investment Trusts (REITs)	Diversified Real Estate Activities
Utilities		Real Estate Management	Real Estate Operating Companies
Real Estate			Real Estate Development
Materials			Real Estate Services
Industrials			
Consumer Discretionary			
Consumer Staples			
Health Care			

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 dropdown menu is open, displaying a hierarchy: 'Real Estate' (highlighted in green), 'Industry Group' (Real Estate), 'Industry' (Real Estate Management), and '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 (dropdown)
- 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 (with search icon)
- 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:

The screenshot displays a web interface for managing addresses. At the top, there's a header 'Address' with three icons: a plus sign, a pencil, and a trash can. Below this is a table with one row. The first column contains a location pin icon and the word 'Office'. The second column shows the name 'John' and the address 'Green I Tech, Rich street, New York, US -'. The third column shows a phone icon with the number '987654321' and an email icon with the address 'John@xyz.com'. To the right of the table are three buttons: 'Edit', 'Delete', and 'View', followed by a vertical ellipsis menu icon. At the bottom, there's a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and navigation icons.

Address		
Office	John Green I Tech, Rich street, New York, US -	987654321 John@xyz.com

Page 1 of 1 (1 of 1 items) | < 1 >

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:

Add Stakeholder

Customer Details * Customer ID *

☐ New ☒ Existing 000006 🔍

Type * Name * Registration Number * Company Type *

Customer COS 999765366 Pvt Ltd

Date of Incorporation * Demography Type * Place of Incorporation * No of Companies *

May 28, 2014 📅 Domestic IN 🔍 1

Address

+ 📄 🗑️

No items to display.

Save Cancel

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' and a 'Read More' link. Below this is a table with 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' on the left and 'Project Stakeholders' on the right. The 'Project Details' section includes fields for Project Objective, Sectors (Real Estate), and Point of Contact (John, with phone number 9876543210 and email john@xyz.com). The 'Project Stakeholders' section shows a total of 1 stakeholder. A table lists the stakeholder 'COS' with details: Registration Number (999765366), Company Type (Pvt Ltd), and Date of Incorporation (May 28, 2014). There are 'Edit', 'Delete', and 'View' buttons for this stakeholder, along with a 'CUSTOMER' tag. At the bottom of the page 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.



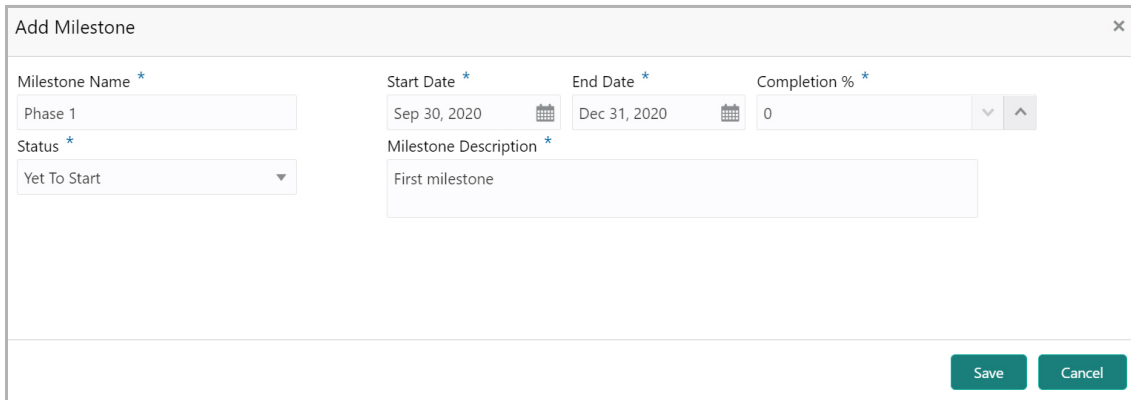
To link a project with a facility in credit proposal application, the existing customer option must be selected and the required party must be linked while adding the stakeholder details. Then, this project Id must be selected in the Facility details window in the Credit Proposal application.

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:



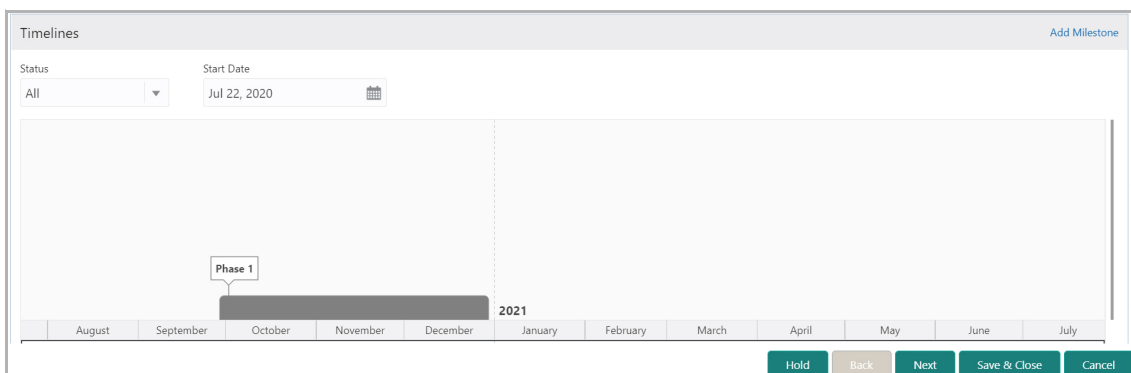
The 'Add Milestone' dialog box contains the following fields:

- Milestone Name ***: Text input with 'Phase 1' entered.
- Status ***: Dropdown menu with 'Yet To Start' selected.
- Start Date ***: Date picker with 'Sep 30, 2020' selected.
- End Date ***: Date picker with 'Dec 31, 2020' selected.
- Completion % ***: Spinner control set to '0'.
- Milestone Description ***: Text area with 'First milestone' entered.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom right.

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

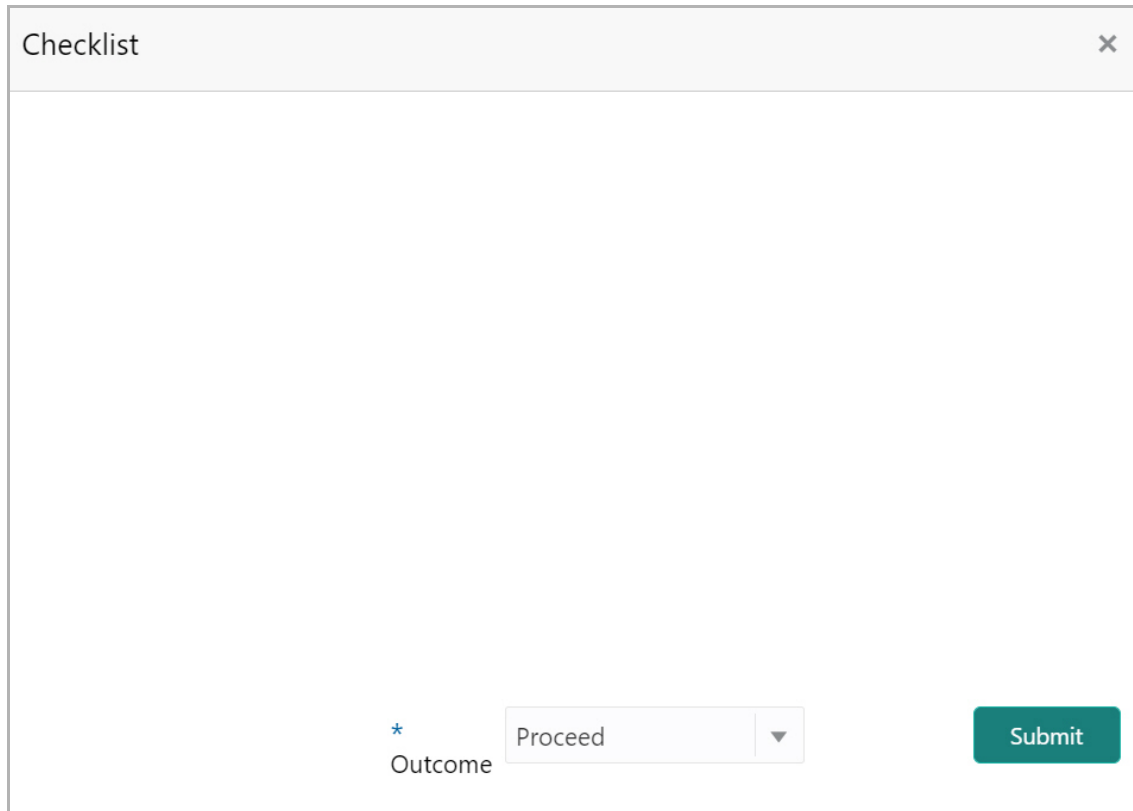
The comments page allows you to capture overall comments for this stage. Adding comments for a stage helps others to identify the actions performed in that stage.

The screenshot shows a web application window titled "Project Definition - Enrichment". At the top, there are two tabs: "Project Summary" (active, marked with a blue checkmark) and "Comments" (inactive, marked with a green checkmark). Below the tabs, the "Comments" section is visible. It features a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, background color, font size, bulleted list, numbered list, link, unlink, H1, H2, link, unlink, and a right arrow. Below the toolbar is a large text area with the placeholder text "Enter text here...". Underneath the text area is a green "Post" button. Below the "Post" button is a box containing the text "No items to display.". At the bottom of the window, there is a row of buttons: "Hold", "Back", "Next", "Save & Close", "Submit", and "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:

A screenshot of a web application window titled "Checklist" with a close button (X) in the top right corner. The window contains a large empty rectangular area for a checklist. At the bottom, there is a label "Outcome" preceded by a blue asterisk (*), a dropdown menu currently showing "Proceed", and a green "Submit" button.

Checklist

* Outcome Proceed ▼ Submit

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:

Free Tasks

Bank Futura - Canary Whar...
Apr 13, 2019

sample@sample.com

Refresh

Acquire

Assign

Flow Diagram

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

Page 1 of 28 (1 - 20 of 560 items) K < 1 2 3 4 5 ... 28 > >

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.

Project Definition - Approval

1

Project Summary

2

Comments

Project Summary

Building Construction

Construction of residential building in eastern part of the city [Read More](#)

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

Project Details

Project Objective

To develop eastern part of the city [Read More](#)

Sectors

Real Estate

Point of Contact

John
9876543210
John@xyz.com
Address
Office
Green I Tech,
Rich street,
New York, US-

Project Stakeholders

1

Total No of Stakeholders

COS

Registration Number	Company Type	Date of Incorporation	Demography Type
999765366	Pvt Ltd	May 28, 2014	Domestic

Timelines

Status

All

Start Date

Jul 22, 2020

Phase 1

2020

2021

Project Summary

Existing Limit

\$13.18M

Outstanding Limit

\$13.18M

[View All](#)

Hold

Back

Next

Save & Close

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.

The screenshot shows a web application window titled "Project Definition - Approval". At the top, there are two tabs: "Project Summary" (active, marked with a blue checkmark) and "Comments" (marked with a green checkmark). Below the tabs, the "Comments" section is visible. It features a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, font size, bulleted list, numbered list, link, unlink, and a right arrow. Below the toolbar is a large text area with the placeholder text "Enter text here...". Underneath the text area is a green "Post" button. Below the "Post" button is a white box containing the text "No items to display.". At the bottom of the window, there is a row of buttons: "Hold", "Back", "Next", "Save & Close", "Submit", and "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

Proceed

Submit

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

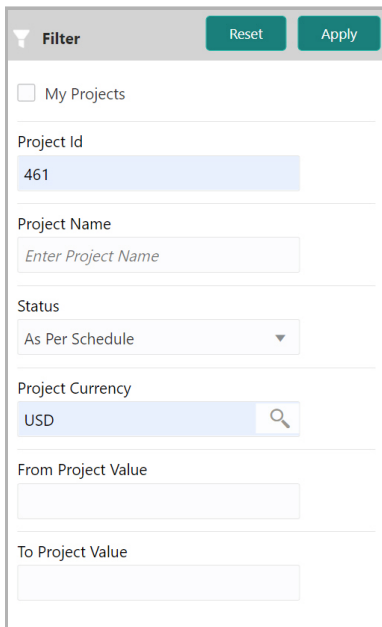
17. Click **Submit**.

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 Portfolio		Bank Futura - Canary Whar... Feb 12, 2020		sample@sample.com
Filter		New Project		
Border road creation		Ahead Of Schedule		
Project Id: PRJ202010041066		Registration Number: REG65465465685	Start Date: Nov 29, 2019	
End Date: Aug 30, 2022		Project Value: \$200,000.00		
		Edit		
		View		
As Per Schedule				
Project Id: PRJ202010161087		Registration Number: 123456	Start Date: Oct 14, 2020	
End Date: Oct 13, 2021		Project Value: \$1,000,000.00		
XYZ Towers		Yet To Start		
Project Id: PRJ202010271106		Registration Number: REG00949	Start Date: Oct 26, 2020	
End Date: Oct 23, 2024		Project Value: \$5,000,000.00		

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

Chapter 3 - Approval

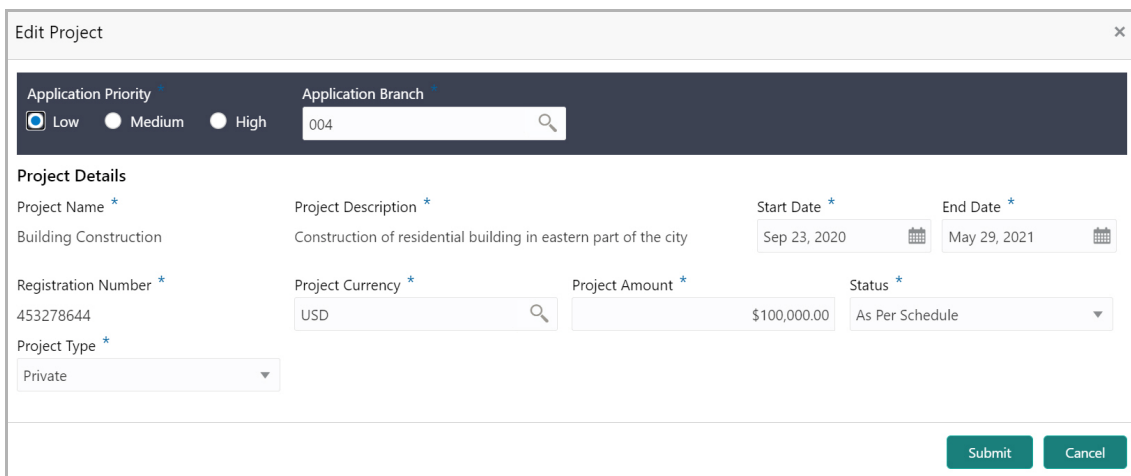


The filter form is located at the top of the page. It has a 'Filter' header with 'Reset' and 'Apply' buttons. Below the header, there is a checkbox for 'My Projects'. The form contains several input fields: 'Project Id' with the value '461', 'Project Name' with a placeholder 'Enter Project Name', 'Status' with a dropdown menu showing 'As Per Schedule', 'Project Currency' with a dropdown menu showing 'USD' and a search icon, '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 is a modal dialog box. It has a title bar with 'Edit Project' and a close button. The form is divided into two main sections. The top section is a dark blue header with 'Application Priority' (radio buttons for Low, Medium, High) and 'Application Branch' (input field with '004' and a search icon). The bottom section is titled 'Project Details' and contains several fields: '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). At the bottom right, there are 'Submit' and 'Cancel' buttons.

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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