

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
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 user manual is designed to help you quickly get acquainted with Priority Code Maintenance process in Oracle Banking Trade Finance Process Management.

1.2 Audience

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

- Oracle Implementers
- Customer Service Representatives (CSRs)
- Oracle user

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>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

1.4 Organization

This manual is organized into the following chapters:

- Preface gives information on the intended audience, structure, and related documents for this User Manual.
- The subsequent chapters provide an overview to the module.

1.5 Related Documents

- Getting Started User Guide
- Common Core User Guide

1.6 Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry

standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

1.7 Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.8 Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

1.9 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. 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:

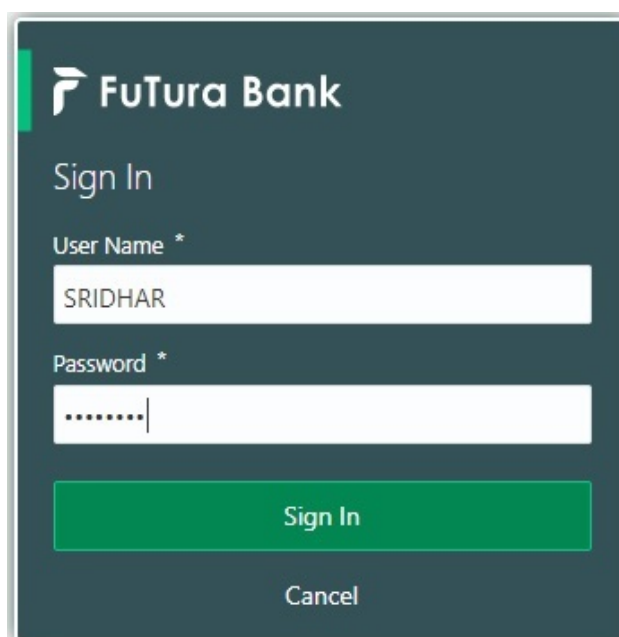
[2.1 Create Priority Code](#)

[2.2 View Priority Code Maintenance](#)

2.1 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 'SRIDHAR' and 'Password *' containing masked characters. Below the input fields are two buttons: a green 'Sign In' button and a 'Cancel' button.

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

The screenshot shows the Oracle dashboard for a user named SRIDHAR. The dashboard includes several widgets:

- High Value Transactions:** A bubble chart showing transactions for GBP and EUR over a period of 12 days. The y-axis ranges from 0 to 120K.
- High Priority Tasks:** A table listing tasks such as 'Import Documentary Collections' and 'Export LC Advising' with columns for Branch and Process Name.
- Priority Summary:** A table showing a summary of tasks, including 'Export Documentary Collections-Update'.
- 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 exceptions like 'Amount Block Exception Approval' and 'Limit Earmarking Exception Approval'.
- SLA Status Summary:** A summary table for 'Export Documentary Collections-Update'.

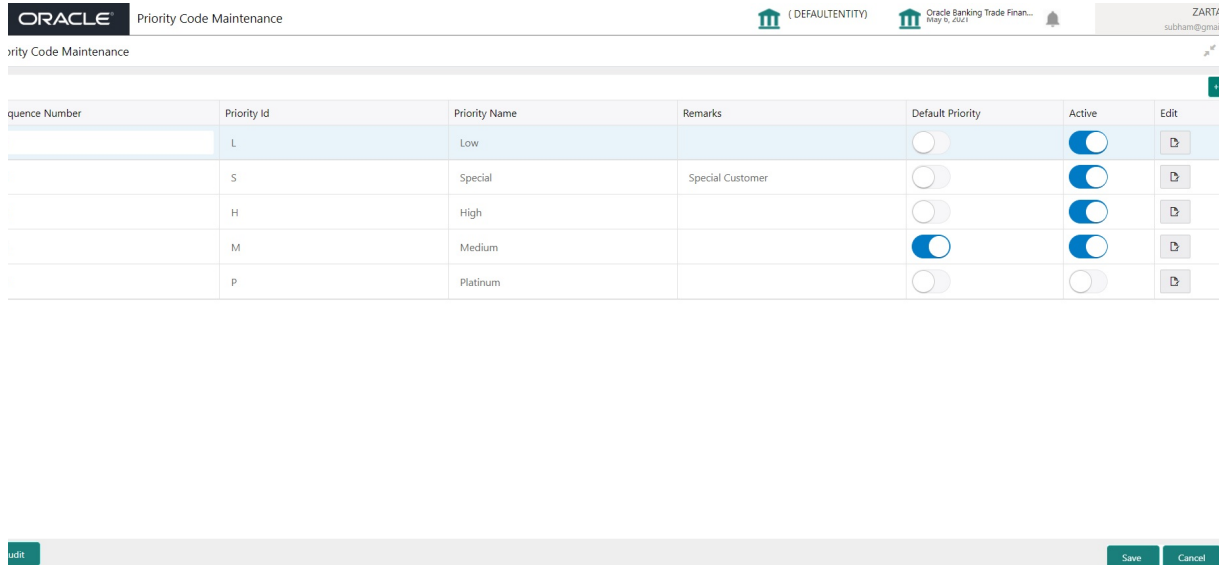
- Click **Core Maintenance > Priority Code > Priority Code Maintenance**.

The screenshot shows the Oracle Core Maintenance > Priority Code > Priority Code Maintenance screen. The left sidebar contains a navigation menu with the following items:

- Maintenance
- Additional Field Maintenance
- Amount Text Language
- ABC Directory
- Checklists
- Currency Definition
- Currency Exchange Rate
- Currency Holiday Master
- Currency Pair Definition
- Currency Rate Type
- Customer Category
- GA System
- Internal Bank Parameters
- Internal Branch Parameters
- Internal Customer
- Target Process
- Local Holiday
- Media
- Priority Code
 - Customer Priority Maintenance
 - Priority Code Maintenance

The main content area is currently blank, indicating that the user has navigated to the 'Priority Code Maintenance' screen.

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	Read only field. System defaults the sequence number from 1 to 5, where Code 1 denotes the least priority and Code 5 denotes the highest priority. 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.
Priority Id	Priority Id of the priority code.
Priority Name	Specify the priority name in which you like to have a priority against each Priority Code. Priority Name should be unique.
Remarks	Specify the priority description.
Default Priority	Enable the option, to mark any one Priority Code as the default Priority. One Priority Code has to be mandatorily marked as “Default Priority” code. 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. Default Priority Code will be populated in the Task under Priority field, if no Priority Code is maintained for the Customer of the Task.

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.

2.1.0.1 Action Buttons

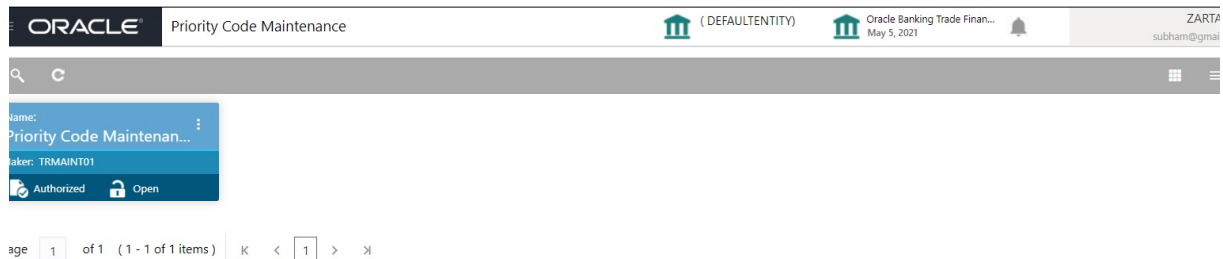
Field	Description
Save	Click to save the record.
Cancel	Click to cancel the record.

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

2.2 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**.

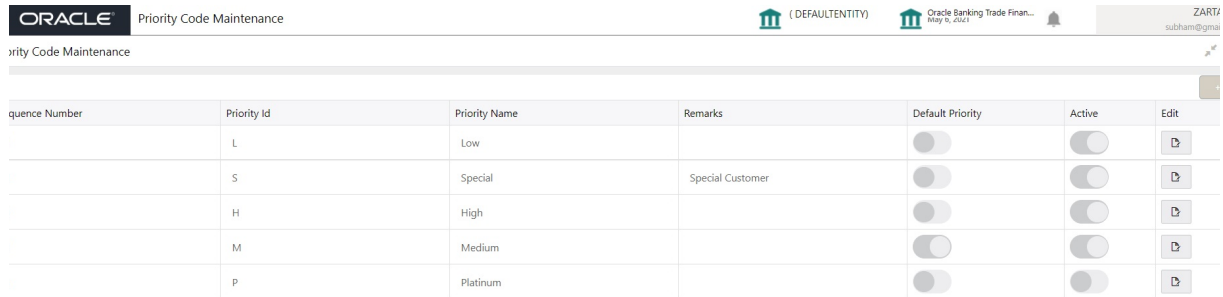


Field	Description
Priority Name	<p>System displays the priority name of the Priority Code.</p> <p>Priority Name is unique.</p>






Field	Description
Maker ID	System displays the maker ID.
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.

2.2.0.1 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 title 'Priority Code Maintenance', and user information including '(DEFAULTTENITY)', 'Oracle Banking Trade Finan...', 'May 10, 2021', and 'ZARTZ subham@gmail'. 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
	L	Low		<input type="checkbox"/>	<input type="checkbox"/>	
	S	Special	Special Customer	<input type="checkbox"/>	<input type="checkbox"/>	
	H	High		<input type="checkbox"/>	<input type="checkbox"/>	
	M	Medium		<input type="checkbox"/>	<input type="checkbox"/>	
	P	Platinum		<input type="checkbox"/>	<input type="checkbox"/>	

audit

2.2.0.2 Audit

Maker

 OBTFPM09

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

Status

 Unauthorized

 Open

Checker





Modification No

1

2.2.0.3

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="614 257 1485 324">Displays the status of the record. Values are Authorized and Unauthorized.</p> <ul data-bbox="646 336 1316 425" style="list-style-type: none"><li data-bbox="646 336 1316 369">• Un-authorized Record – View, Unlock and Authorize.<li data-bbox="646 380 1316 414">• Authorized Record – View, Unlock

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