

# Oracle® Banking Credit Facilities Process Management Cloud Service

## Collateral Insurance User Guide



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## Oracle Banking Credit Facilities Process Management Cloud Service User Guide

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# Preface

## About this Guide

A brief introduction to the Collateral Insurance User Guide.

This guide helps you get familiar with the Collateral Insurance process in OBCFPM to manage insurance for the added collaterals.

## Audience

Audience of Collateral Insurance User Guide.

This guide is intended for the Credit Officer responsible for reviewing customer collaterals on a periodic basis.

## Common Icons in OBCFPM

List of icons commonly used in OBCFPM for quick reference.

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

**Table 1-1 Common Icons**

Icons	Purpose
	To add new record.
	To modify existing record.
	To delete a record.
	To pick start or end date.
	To configure or change default settings.
	To view the data in graphical format.

Table 1-1 (Cont.) Common Icons

Icons	Purpose
	To change the screen layout to list view.
	To change the screen layout to table view.
	To change the screen layout to tree view.
	To view, edit, and delete a record.
	To hold the process.
	To go back to the previous screen.
	To go to the next data segment.
	To save the captured information and exit the process window.
	To submit the task to next stage.
	To exit the window without saving the captured information.

# Initiation

## Insurance Initiation

Detailed information about the Insurance Initiation stage in Collateral Insurance process.

In this stage, the user authorized to initiate the Collateral Insurance process must update or add latest insurance details for the collateral and send it for approval.

The following data segments are available in the Insurance Initiation stage:

- Basic Info
- Collateral Type (Property)
- Comments

## Basic Info

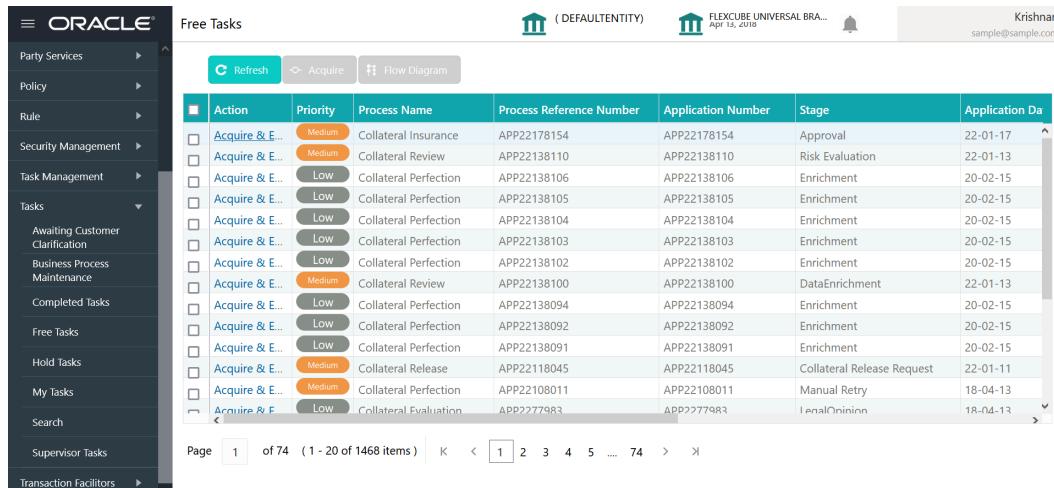
Information on the Basic Info data segment in Insurance Initiation stage.

This data segment displays basic collateral details captured as part of Collateral Perfection or Review process. You can modify the applicable details, if required.

1. To launch the **Initiation - Basic Info** screen, navigate to Tasks > Free Tasks from the left menu.

The **Free Tasks** screen is displayed.

**Figure 2-1 Free Tasks**



The screenshot shows the Oracle Free Tasks interface. The top navigation bar includes the Oracle logo, a sidebar with various menu items like Party Services, Policy, Rule, Security Management, Task Management, and Tasks (with sub-options Awaiting Customer Clarification, Business Process Maintenance, Completed Tasks, Free Tasks, Hold Tasks, My Tasks, Search, Supervisor Tasks, and Transaction Facilitors), and a user profile for Krishnan sample@sample.com. The main content area is titled 'Free Tasks' and contains a table with the following columns: Action, Priority, Process Name, Process Reference Number, Application Number, Stage, and Application Da. The table lists 1468 items, with the current page being 1 of 74. The tasks listed include various actions like 'Acquire & E...', 'Collateral Insurance', 'Collateral Review', 'Collateral Perfection', and 'Collateral Release', each with a unique process reference number and application number, and categorized by stage (Approval, Risk Evaluation, Enrichment, DataEnrichment, Manual Retry) and application date.

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Da
Acquire & E...	Medium	Collateral Insurance	APP22178154	APP22178154	Approval	22-01-17
Acquire & E...	Medium	Collateral Review	APP22138110	APP22138110	Risk Evaluation	22-01-13
Acquire & E...	Low	Collateral Perfection	APP22138106	APP22138106	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138105	APP22138105	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138104	APP22138104	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138103	APP22138103	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138102	APP22138102	Enrichment	20-02-15
Acquire & E...	Medium	Collateral Review	APP22138100	APP22138100	DataEnrichment	22-01-13
Acquire & E...	Low	Collateral Perfection	APP22138094	APP22138094	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138092	APP22138092	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138091	APP22138091	Enrichment	20-02-15
Acquire & E...	Medium	Collateral Release	APP22118045	APP22118045	Collateral Release Request	22-01-11
Acquire & E...	Medium	Collateral Perfection	APP22108011	APP22108011	Manual Retry	18-04-13
Acquire & F...	Low	Collateral Evaluation	APP2277983	APP2277983	FinalOnInnn	18-04-13

2. Acquire & Edit the required Insurance Initiation task.

Figure 2-2 Initiation - Basic Info

3. View / modify the necessary details.

 **Note:**

For information on fields in the Basic Info data segment, refer **Collateral Perfection or Review User Guide**.

4. After performing necessary actions in the **Initiation - Basic Info** screen, click **Next**.

## Property

Procedure to add or update insurance details.

This data segment allows to modify collateral details added in the Collateral Perfection / Review process, and manage insurance details, covenants, and documents for the collateral.

 **Note:**

In this guide, only the procedure to add and update insurance details is provided. For information on collateral specific fields, managing covenants, and uploading documents, refer **Collateral Evaluation User Guide**.

Upon clicking **Next** in the **Initiation - Basic Info** screen, the Collateral Type data segment is displayed based on the collateral selected at the time of insurance process initiation.

**Figure 2-3 Initiation - Property**

Collateral Insurance - Initiation

Basic Info

Property

Comments

Property

Collateral Details

COL2242073 Collateral ID	Property Collateral Type	USD Collateral Currency	\$10,000.00 Total Value
-----------------------------	-----------------------------	----------------------------	----------------------------

Registration Number: REGN9000121   Property Type: COMMERCIAL BUILDING   Registered Owner: REGN9000111  
Market Value: \$10,000.00

Page 1 of 1 (1 of 1 items)   K < 1 > X

Edit

View

Delete

Audit

Hold

Back

Next

Save & Close

Cancel

1. Click the action icon in the collateral record and select the **Edit**.  
The **Initiation - Configure - Collateral Type** screen is displayed.

Figure 2-4 Initiation - Configure - Property

Configure

Property

Property

Property ID: COMMERCIAL BUILDING

Property Category: Individual

Registered Owner: REGN900011

Description: Personal

Land registry: Purchase Date: NORMAL

Flood Zone: Flood Zone Type: Seismic Zone: Seismic Zone Type: Environment Assessment Required: \*

Seismic Zone Type: Select

Restricted Property: Under Construction: Nature Of Property: Select

Property Status: Off: Wall Material: Roof Type: Select

Registration Date: Property Value: Adverse Comments: USD

▶ Property Location

▶ Currency Details

▶ Property Dimension

▶ Property Valuation Details

▶ Property Contact Details

▶ Residential Status

Back Next

2. Click **Next** and navigate to **Collateral Insurance** menu.

Figure 2-5 Initiation - Configure - Collateral Insurance

Configure

Collateral Insurance

EXISTING

Policy Number: LICINDIA

Policy Name: SDDD

Insurance Name: dfadfadff

Insurance Currency: USD

Insurance Amount: \$3,500.00

View

Edit

Delete

Back Next

3. To add new insurance details, click + the add icon.  
The following window is displayed.

Figure 2-6 Collateral Details

The screenshot shows the 'Collateral Details' window with two main sections: 'Insurance Basic Details' and 'Insurance Premium Details'. The 'Insurance Basic Details' section contains fields for Policy Number (45678043687), Policy Name (Contract Policy), Insurance Provider (First Bank), Insurance Name (Contract Insurance), Insurance Type (Asset Insurance), Insurance Currency (INR), Insurance Amount (₹100,000.00), End Date (May 1, 2021), Grace Days (10), Policy Status (Inforced), Start Date (May 1, 2020), and Notice Days (10). The 'Insurance Premium Details' section contains fields for Premium Currency (INR), Premium Amount (₹9,000.00), Premium Frequency (Monthly), Premium End Date (May 1, 2021), and Remarks. At the bottom are 'Add', 'Cancel', and 'Clear' buttons.

4. Specify all the details in the **Insurance Details** screen.

For field level information, refer the following tables.

Table 2-1 Insurance Basic Details - Field Description

Fields/ Icons	Description
<b>Policy Number</b>	Specify the insurance <b>Policy Number</b> .
<b>Policy Name</b>	Specify the insurance <b>Policy Name</b> .
<b>Insurance Provider</b>	Specify the name of <b>Insurance Provider</b> .
<b>Insurance Name</b>	Specify the name of insurance.
<b>Insurance Type</b>	Select the <b>Insurance Type</b> from the drop down list. The options available include but are not limited to: <ul style="list-style-type: none"> <li>Asset Insurance</li> <li>Life Insurance</li> <li>Corporate Insurance</li> <li>Borrower Insurance</li> </ul>
<b>Policy Status</b>	Select the <b>Policy Status</b> from the drop down list. The options available include but are not limited to: <ul style="list-style-type: none"> <li>Inforced</li> <li>Lapsed</li> <li>Paidup</li> </ul>
<b>Insurance Amount</b>	Specify the <b>Insurance Amount</b> in selected insurance currency.
<b>Start Date</b>	Click the calendar icon and select the insurance <b>Start Date</b> .
<b>End Date</b>	Click the calendar icon and select the insurance <b>End Date</b> .

**Table 2-1 (Cont.) Insurance Basic Details - Field Description**

Fields/ Icons	Description
<b>Grace Days</b>	Specify the <b>Grace Days</b> for making insurance premium payment.
<b>Notice Days</b>	Specify the <b>Notice Days</b> for insurance premium payment.
<b>Policy Assigned To Bank</b>	Specify if the policy is assigned to your bank by selecting required option from the <b>Policy Assigned To Bank</b> drop down list.

**Table 2-2 Collateral Details - Insurance Premium Details - Field Description**

Fields/ Icons	Description
<b>Premium Currency</b>	Click the search icon in the <b>Premium Currency</b> field and select the currency in which insurance premium is paid.
<b>Premium Amount</b>	Specify the <b>Premium Amount</b> in selected premium currency.
<b>Premium Frequency</b>	Select the <b>Premium Frequency</b> from the drop down list.
<b>Premium End Date.</b>	Click the calendar icon and select the <b>Premium End Date</b> .
<b>Remarks</b>	Type <b>Remarks</b> about the insurance, if any.

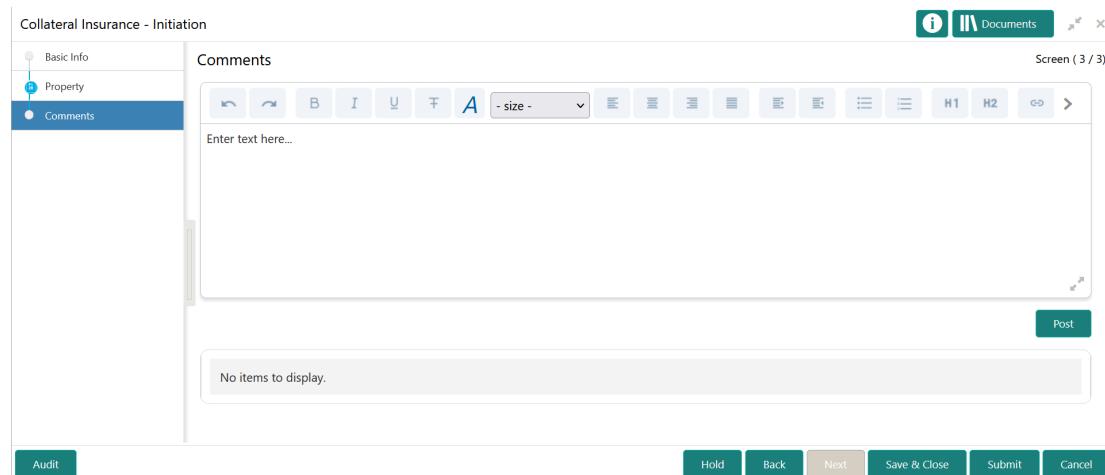
5. Click **Add**. The insurance details are added and displayed in the **Initiation - Configure - Collateral Insurance** screen.
6. To **Edit**, **View**, or **Delete** the existing collateral insurance details, click the action icon in the insurance record and select the required option.
7. After performing necessary actions in the configuration window, click **Submit**. The **Configuration** screen is closed.
8. To go to the next data segment, click **Next** in the **Initiation - Collateral Type (Property)** screen.

## Comments

Information on the Comments data segment in the Insurance Initiation stage.

The Comments data segment allows you to post overall comments for the Insurance Initiation stage. Posting comments helps the user of next stage to better understand the application.

Upon clicking **Next** in the **Initiation - Collateral Type** screen, the Comments data segment is displayed.

**Figure 2-7 Initiation - Comments**

Collateral Insurance - Initiation

Comments

Enter text here...

Post

No items to display.

Audit Hold Back Next Save & Close Submit Cancel

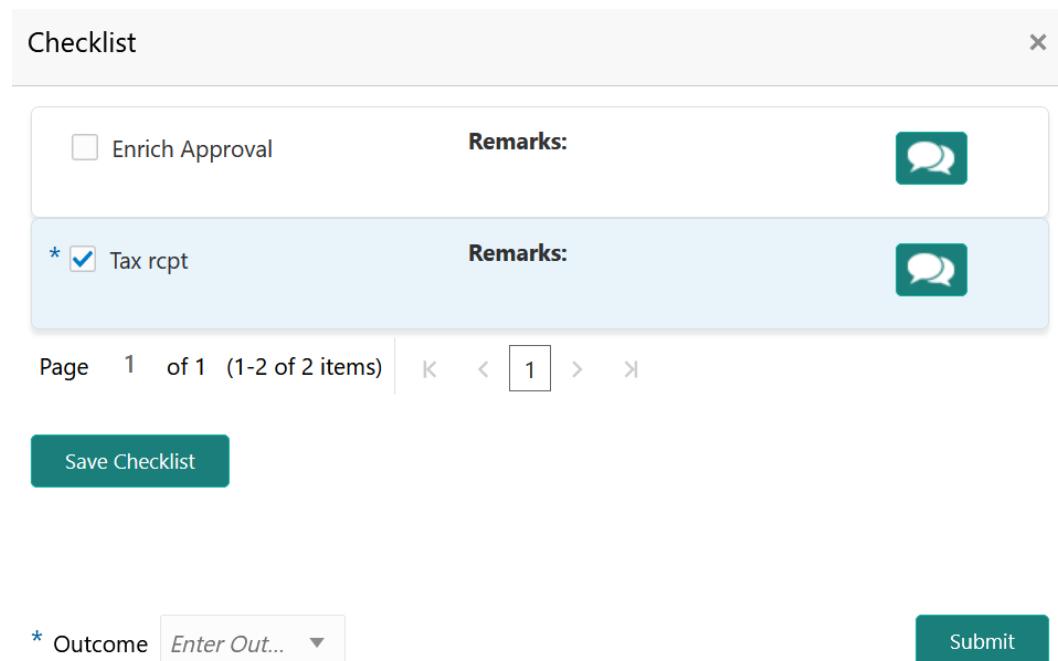
**1.** Type your comments for the Initiation stage in the **Comments** text box.

**2.** Click **Post**.

Comments are posted and displayed below the **Comments** text box.

**3.** Click **Submit**.

The Checklist window is displayed.

**Figure 2-8 Checklist**

Checklist

Enrich Approval

Remarks:

Tax rcpt

Remarks:

Page 1 of 1 (1-2 of 2 items)

1

Save Checklist

\* Outcome Enter Out... ▾

Submit

**4.** Manually verify all the checklist and enable the corresponding check box.

**5.** Select the **Outcome** as **Proceed**.

**6. Click **Submit**.**

The application is moved to the Approval stage.

# Approval

## Insurance Approval

Detailed information about the Insurance Approval stage in Collateral Insurance process.

In this stage, the user authorized to edit the Insurance Approval task must review the collateral insurance details captured in the Initiation stage and take necessary action to approve or reject the application.

The following data segments are available in the Insurance Approval stage:

- Basic Info
- Collateral Type (Property)
- Comments

## Basic Info

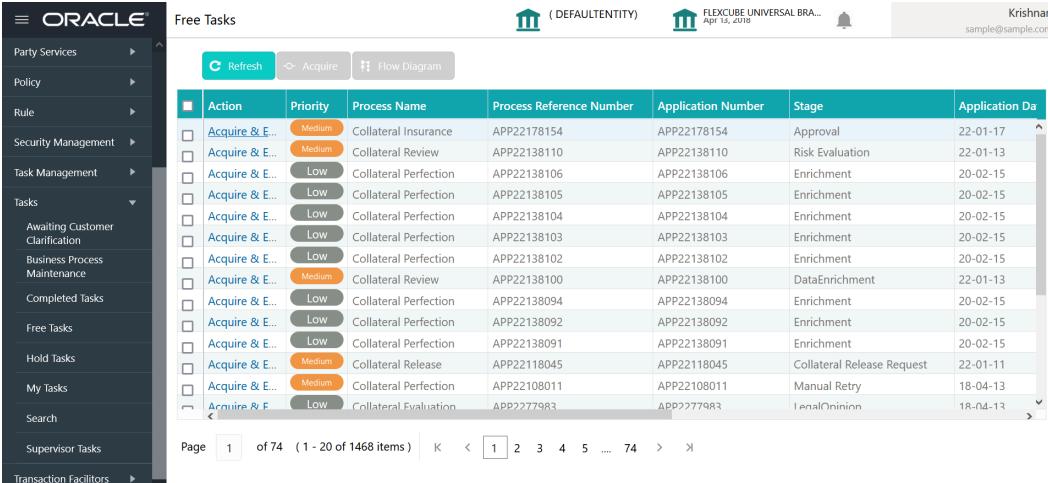
Information on the Basic Info data segment in Insurance Approval stage.

This data segment displays basic collateral details captured as part of Collateral Perfection or Review process. You can modify the applicable details, if required.

1. To launch the **Approval - Basic Info** screen, navigate to Tasks > Free Tasks from the left menu.

The **Free Tasks** screen is displayed.

**Figure 3-1 Free Tasks**



The screenshot shows the Oracle Free Tasks screen. The left sidebar lists various menu items: Party Services, Policy, Rule, Security Management, Task Management, Tasks (selected), Awaiting Customer Clarification, Business Process Maintenance, Completed Tasks, Free Tasks (selected), Hold Tasks, My Tasks, Search, Supervisor Tasks, and Transaction Facilitors. The main area is titled 'Free Tasks' and shows a table of tasks. The table has columns: Action, Priority, Process Name, Process Reference Number, Application Number, Stage, and Application Da. The tasks listed are:

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Da
Acquire & E...	Medium	Collateral Insurance	APP22178154	APP22178154	Approval	22-01-17
Acquire & E...	Medium	Collateral Review	APP22138110	APP22138110	Risk Evaluation	22-01-13
Acquire & E...	Low	Collateral Perfection	APP22138106	APP22138106	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138105	APP22138105	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138104	APP22138104	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138103	APP22138103	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138102	APP22138102	Enrichment	20-02-15
Acquire & E...	Medium	Collateral Review	APP22138100	APP22138100	DataEnrichment	22-01-13
Acquire & E...	Low	Collateral Perfection	APP22138094	APP22138094	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138092	APP22138092	Enrichment	20-02-15
Acquire & E...	Low	Collateral Perfection	APP22138091	APP22138091	Enrichment	20-02-15
Acquire & E...	Medium	Collateral Release	APP22118045	APP22118045	Collateral Release Request	22-01-11
Acquire & E...	Medium	Collateral Perfection	APP22108011	APP22108011	Manual Retry	18-04-13
Acquire & E...	Low	Collateral Evaluation	APP22779R3	APP22779R3	FinalOrInitial	18-04-13

Page 1 of 74 (1 - 20 of 1468 items) < 1 2 3 4 5 ... 74 > >>

2. Acquire & Edit the required Insurance Approval task.

Figure 3-2 Approval - Basic Info

The screenshot shows the 'Collateral Insurance - Approval' screen. The left sidebar has tabs for 'Basic Info' (selected), 'Property', and 'Comments'. The main area is titled 'Basic Info' and contains several data segments:

- Customer details:** Customer ID: CUST1000, Customer Name: CUST1000
- Collateral details:** Collateral ID: COL2242073, Collateral Type: Property, Collateral Category: RESIDENTIAL PROPERTY, Collateral Subcategory: Description1, Collateral Description: Description1, Collateral Currency: USD
- Applicable Business:** LT\_Lending
- LTV Percentage:** 100
- Document Status:** Not Submitted
- Ownership details:** Ownership Type: Single, Shareable Across Customers: Yes
- Revaluation Details:** Revaluation Type: Automatic, Revaluation Method: Custom, Revaluation Frequency: Yearly, Revaluation Start Month: February, Revaluation Day: 1

At the bottom are buttons: Audit, Hold, Back, Next, Save & Close, and Cancel.

3. View / modify the necessary details.

 **Note:**

For information on fields in the Basic Info data segment, refer **Collateral Perfection or Review User Guide**.

4. After performing necessary actions in the **Approval - Basic Info** screen, click **Next**.

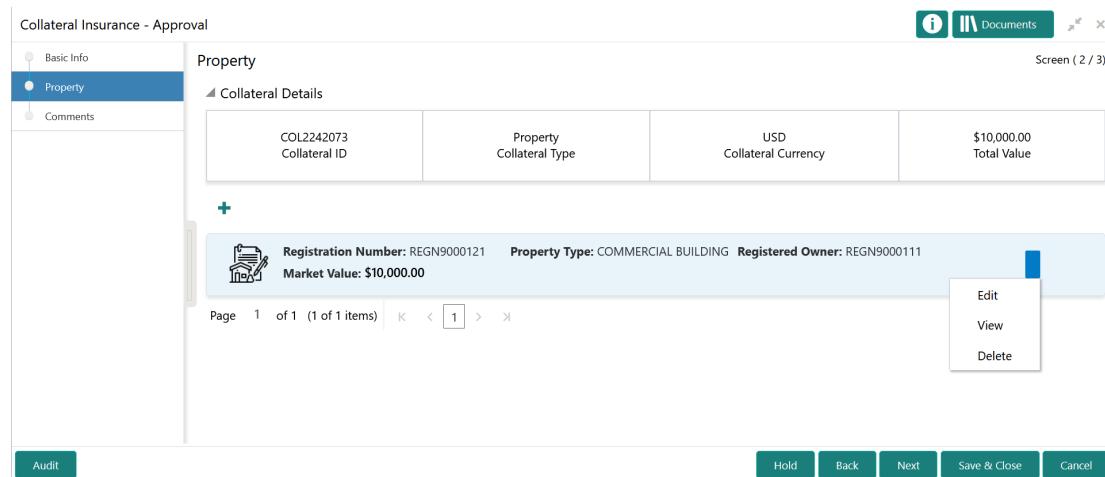
## Property

Information on the Property data segment in the Insurance Approval stage.

This data segment allows to view the collateral insurance details captured in the Insurance Initiation stage.

Upon clicking **Next** in the **Approval - Basic Info** screen, the Collateral Type data segment is displayed based on the collateral selected at the time of insurance process initiation.

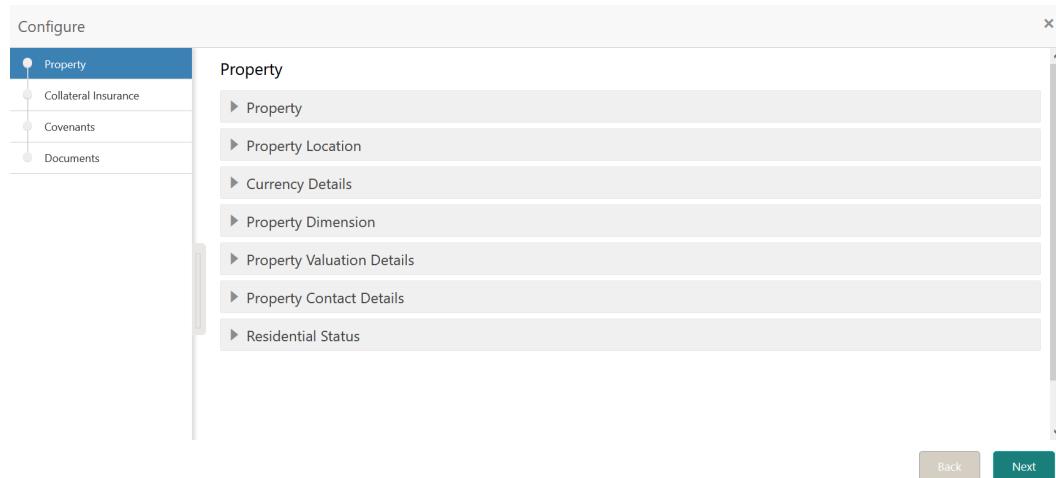
**Figure 3-3 Approval - Property**



1. Click the action icon in the collateral record and select **View**.

The **Approval - Configure - Collateral Type** screen is displayed in view only mode.

**Figure 3-4 Approval - Configure - Property**



2. Click **Next** and navigate to the **Collateral Insurance** menu.
3. View the insurance details by clicking the action icon in insurance record and selecting **View** option.
4. After viewing the necessary details, exit the configuration screen and click **Next** in the **Approval - Collateral Type** screen.

## Comments

Information on the Comments data segment in the Insurance Approval stage.

The Comments data segment allows you to post overall comments for the Insurance Approval stage.

Upon clicking **Next** in the **Approval - Collateral Type** screen, the **Comments** data segment is displayed.

**Figure 3-5 Approval - Comments**

The screenshot shows the 'Collateral Insurance - Approval' screen. The left sidebar has tabs for 'Basic Info', 'Property', and 'Comments', with 'Comments' selected. The main area is titled 'Comments' and contains a text input field with placeholder text 'Enter text here...'. Below the input field is a 'Post' button. At the bottom of the screen, there are buttons for 'Audit', 'Hold', 'Back', 'Next' (which is highlighted in orange), 'Save & Close', 'Submit', and 'Cancel'. The status bar at the bottom right says 'Screen (3 / 3)'.

1. Type your comments for the Approval stage in the **Comments** text box.
2. Click **Post**.

Comments are posted and displayed below the **Comments** text box.

3. Click **Submit**.

The Checklist window is displayed.

**Figure 3-6 Checklist**

The screenshot shows the 'Checklist' window. It contains two items: 'Enrich Approval' (unchecked) and 'Tax rcpt' (checked). Each item has a 'Remarks:' field with a speech bubble icon. At the bottom, there is a page navigation bar with 'Page 1 of 1 (1-2 of 2 items)' and a 'Save Checklist' button. A dropdown menu for 'Outcome' is also visible at the bottom right.

4. Manually verify all the checklist and enable the corresponding check box.

5. Select the required **Outcome** and click **Submit**.

The options available in the drop down list are:

- Approve
- Reject

If **Approve** is selected as the **Outcome**, the Collateral Insurance process is completed on clicking **Submit**.

If **Reject** is selected as the **Outcome**, the insurance application is rejected on clicking **Submit**.

# Handoff - Manual Retry

## Handoff - Manual Retry

Detailed information about the Manual Retry stage in Collateral Insurance process.

Collateral insurance details are automatically handed off to the back office system on submitting the Insurance Approval task. In case of any failure, the system generates the Manual Retry task and lists in the Free Tasks queue. The user must edit the task and fix all the handoff errors before submitting the task.

## Collateral Summary

Information on the Collateral Summary data segment in Manual Retry stage.

In the Collateral Summary data segment, the following collateral details captured in the previous stages / perfection process are displayed.

- Basic Information
  - Collateral Type (Property) Details
  - Linked Facilities Details
  - Ownership
  - Seniority of Details
  - Covenants
  - Insurance
- 1.** To launch the **Manual Retry - Collateral summary** screen, navigate to Tasks > Free Tasks from the left menu.

The **Free Tasks** screen is displayed.

Figure 4-1 Free Tasks

Action	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date
Acquire & Edit	Medium	Collateral Insurance	APP22178154	APP22178154	Approval	22-01-17
Acquire & Edit	Medium	Collateral Review	APP22138110	APP22138110	Risk Evaluation	22-01-13
Acquire & Edit	Low	Collateral Perfection	APP22138106	APP22138106	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138105	APP22138105	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138104	APP22138104	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138103	APP22138103	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138102	APP22138102	Enrichment	20-02-15
Acquire & Edit	Medium	Collateral Review	APP22138100	APP22138100	DataEnrichment	22-01-13
Acquire & Edit	Low	Collateral Perfection	APP22138094	APP22138094	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138092	APP22138092	Enrichment	20-02-15
Acquire & Edit	Low	Collateral Perfection	APP22138091	APP22138091	Enrichment	20-02-15
Acquire & Edit	Medium	Collateral Release	APP22118045	APP22118045	Collateral Release Request	22-01-11
Acquire & Edit	Medium	Collateral Perfection	APP22108011	APP22108011	Manual Retry	18-04-13
Acquire & Edit	Low	Collateral Evaluation	APP2277983	APP2277983	LegalOpinion	18-04-13

2. Click **Acquire & Edit** in the required Manual Retry task.

The **Manual Retry - Collateral Summary** screen is displayed.

Figure 4-2 Manual Retry - Collateral Summary

Collateral Summary						
Customer ID	Application ID	Current Status	Documents	Collateral Type	Collateral Category	Ownership Type
CUST1000	APP22178154	0	0	Property	RESIDENTIAL PROPERTY	Single

Basic Information						
COL2242073	Agreed Collateral Value	Held Collateral Value	Available From	Available Till	Applicable Business	
Collateral Currency USD	\$100,000.00		2022-01-03	2022-01-03	LT_Lending	
Exposure Type Pledge	Charge Type Pledge	Purpose Of Collateral New Facility	Shareable Across Customers No			

Property	Linked Facilities Details	Ownership
1 Collateral	No data to display	No data to display
\$10K Collateral Value		

Seniority of charge	Covenants	Insurance
1 Position	0 Covenants proposed Standard Covenants Applicable	1 Active Insurance
0 Total Percentage	0 Complied Covenants	0 Breached Covenants
100 Percentage Available		USD 3,500.00 Total Insurance Amount

3. View the Collateral Summary and click **Next**.

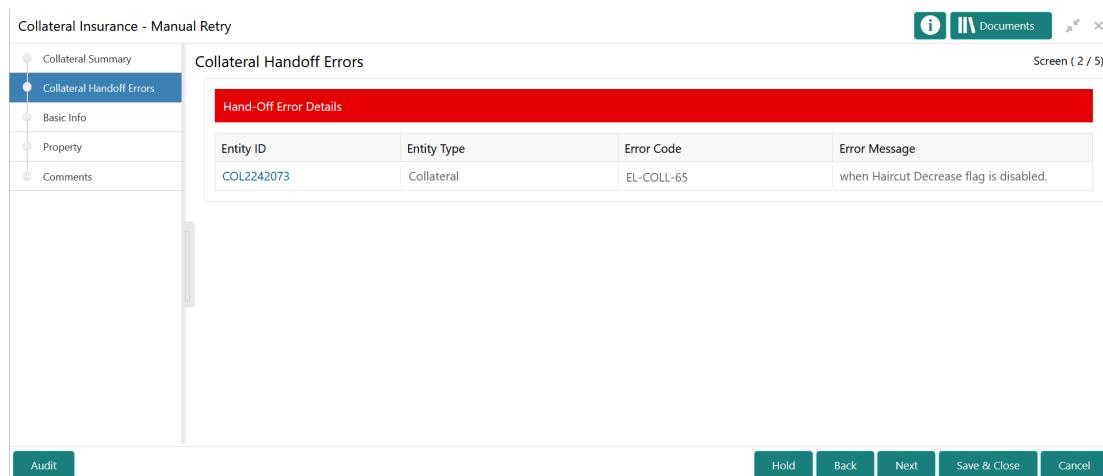
## Collateral Handoff Errors

Information on the Collateral Handoff Errors data segment in the Manual Retry stage.

This data segment displays the handoff error details such as Entity ID, Entity Type, Error Code, and Error Message for taking necessary action.

Upon clicking **Next** in the **Manual Retry - Collateral Summary** screen, the Collateral Handoff Errors data segment is displayed.

**Figure 4-3 Manual Retry - Collateral Handoff Errors**



The screenshot shows the 'Collateral Insurance - Manual Retry' application. The left sidebar has a tree structure with nodes: Collateral Summary (selected), Collateral Handoff Errors (selected), Basic Info, Property, and Comments. The main content area is titled 'Collateral Handoff Errors' and contains a table titled 'Hand-Off Error Details'. The table has four columns: Entity ID, Entity Type, Error Code, and Error Message. The data is as follows:

Entity ID	Entity Type	Error Code	Error Message
COL2242073	Collateral	EL-COLL-65	when Haircut Decrease flag is disabled.

At the bottom, there are buttons: Audit, Hold, Back, Next, Save & Close, and Cancel. The status bar at the top right says 'Screen (2 / 5)'.

1. View the **Hand-off Error Details**.
2. Click **Next**.

## Basic Info

Information on the Basic Info data segment in Manual Retry stage.

This data segment displays review and basic collateral details captured as part of review initiation. In case there is handoff error in this screen, you must fix it before proceeding to the next data segment.

Upon clicking **Next** in the **Manual Retry - Collateral Handoff Errors** screen, the Basic Info data segment is displayed.

Figure 4-4 Manual Retry - Basic Info

The screenshot shows the 'Collateral Review - Manual Retry' interface. The 'Basic Info' tab is selected in the left sidebar. The main area is titled 'Basic Info' and contains several sections: 'Customer details' (Customer ID: CUST1000, Customer Name: CUST1000), 'Collateral details' (Collateral ID: COL2242073, Collateral Type: RESIDENTIAL PROPERTY, Collateral Category: RESIDENTIAL PROPERTY, Collateral Subcategory: Description1, Collateral Currency: USD), and other fields like Agreed Collateral Value (\$100,000.00), Collateral Start and End Date (Jan 3, 2022 to Jan 3, 2022), Charge Type (Pledge), and Purpose Of Collateral (New Facility). The 'Audit' button is visible at the bottom left, and 'Hold', 'Back', 'Next', 'Save & Close', and 'Cancel' buttons are at the bottom right.

1. Modify the necessary details.

 **Note:**

For information on fields in the Basic Info data segment, refer **Review Initiation** topic in the **Data Enrichment** chapter.

2. After performing necessary actions in the **Manual Retry - Basic Info** screen, click **Next**.

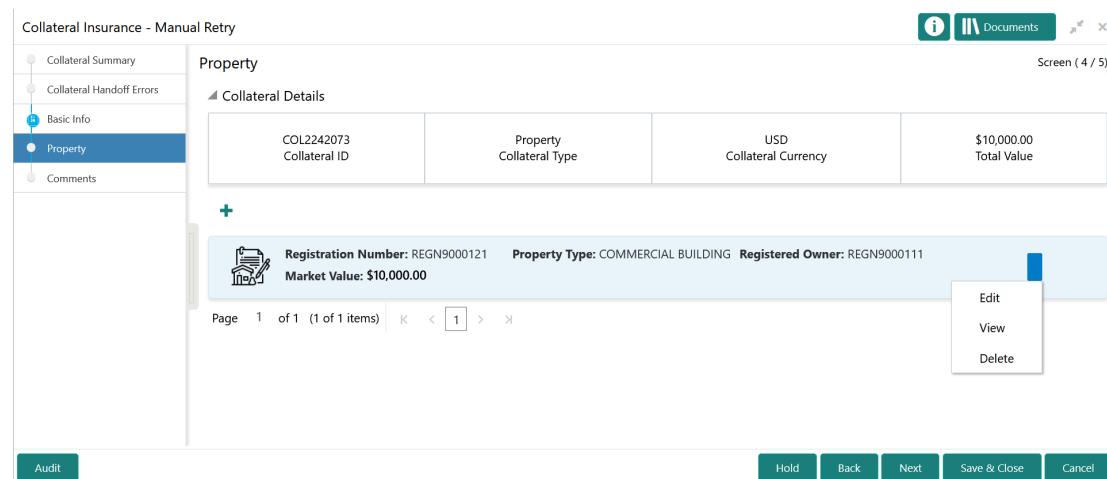
## Property

Information on the Property data segment in Manual Retry stage.

This data segment allows to modify insurance details added in the previous stages. In case there is handoff error in this screen, you must fix it before proceeding to the next data segment.

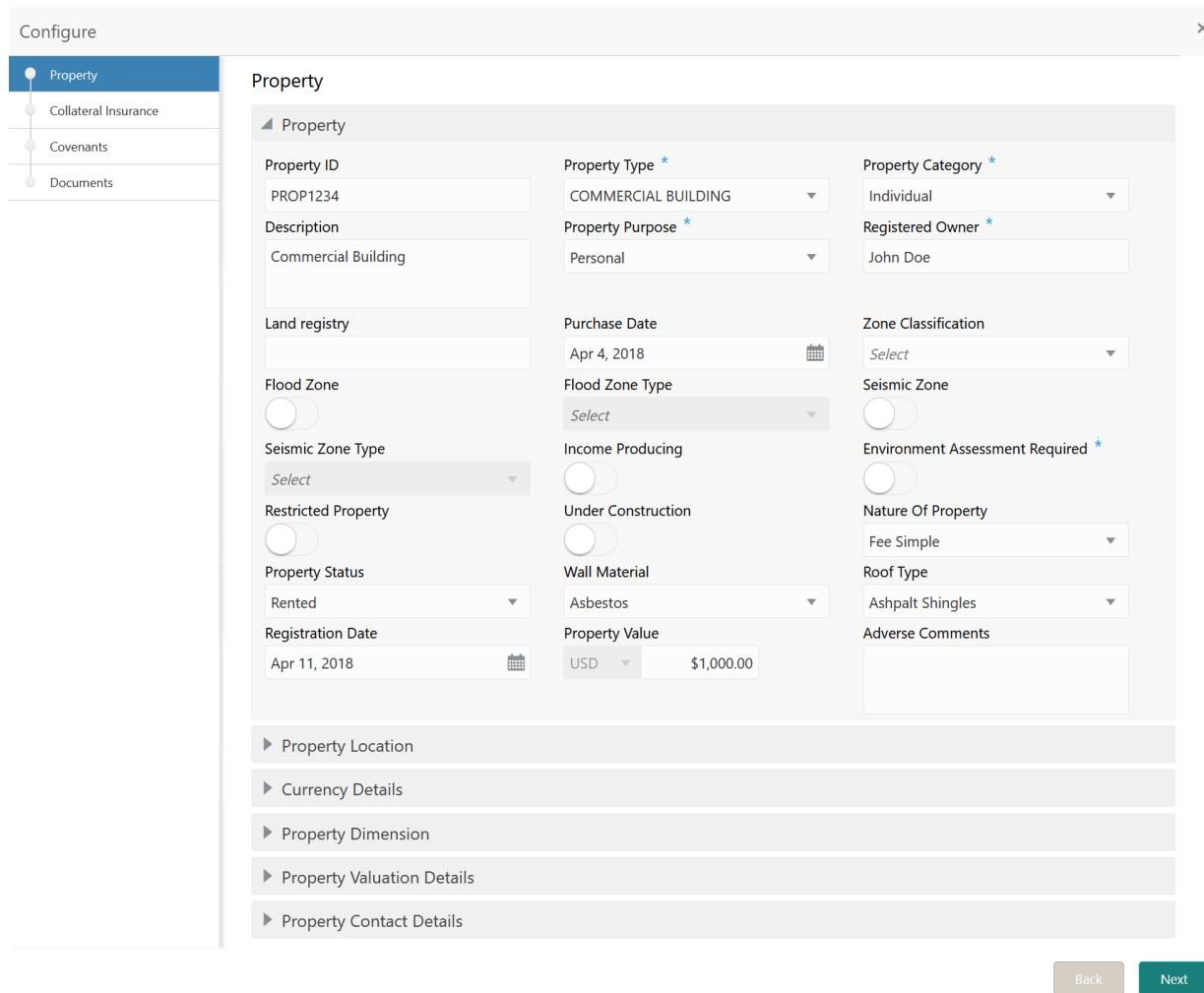
Upon clicking **Next** in the **Manual Retry - Basic Info** screen, the Collateral Type data segment is displayed based on the collateral selected at the time of Insurance process initiation.

Figure 4-5 Manual Retry - Property



To modify the insurance details, click the action icon in the collateral record and select **Edit**. The **Manual Retry - Configure - Property** screen is displayed.

Figure 4-6 Manual Retry - Configure - Property



The screenshot shows the 'Configure' interface for 'Property'. The left sidebar has a tree structure with 'Property' selected. The main area is titled 'Property' and contains the following fields:

Property ID	Property Type *	Property Category *
PROP1234	COMMERCIAL BUILDING	Individual
Description	Property Purpose *	Registered Owner *
Commercial Building	Personal	John Doe
Land registry	Purchase Date	Zone Classification
	Apr 4, 2018	Select
Flood Zone	Flood Zone Type	Seismic Zone
Off	Select	Off
Seismic Zone Type	Income Producing	Environment Assessment Required *
Select	Off	Off
Restricted Property	Under Construction	Nature Of Property
Off	Off	Fee Simple
Property Status	Wall Material	Roof Type
Rented	Asbestos	Ashpalt Shingles
Registration Date	Property Value	Adverse Comments
Apr 11, 2018	USD \$1,000.00	

Below the main form are expandable sections: 'Property Location', 'Currency Details', 'Property Dimension', 'Property Valuation Details', and 'Property Contact Details'. At the bottom are 'Back' and 'Next' buttons.

**Note:**

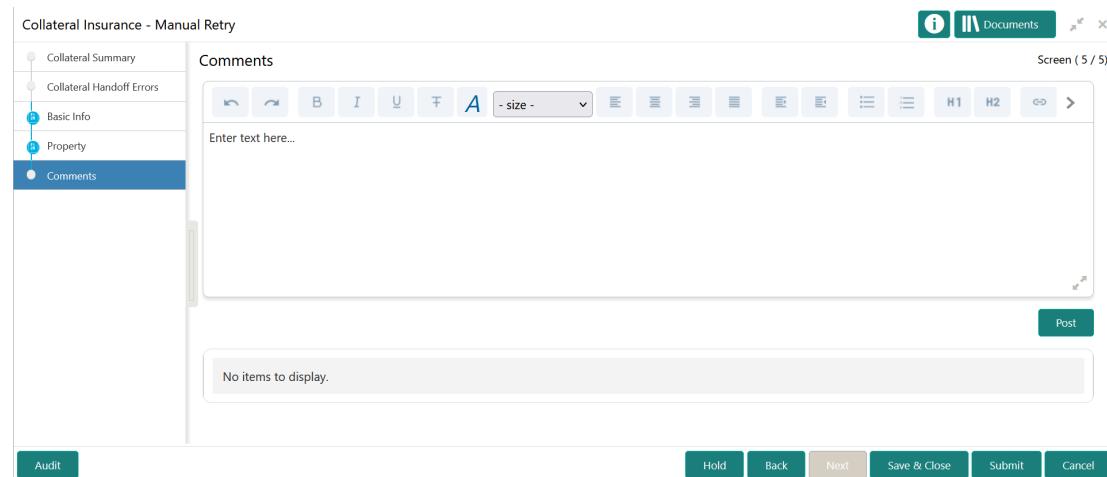
For detailed information on collateral specific fields, **Collateral Insurance**, **Covenants**, and **Documents** menus, refer **Collateral Review User Guide**.

## Comments

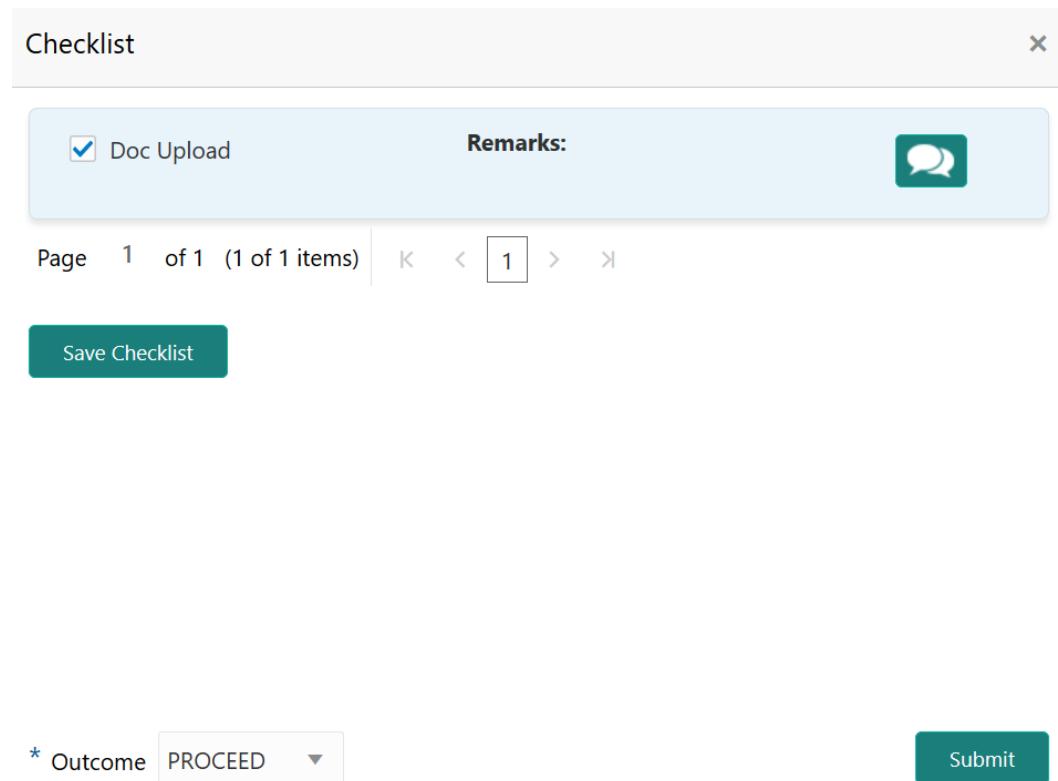
Information on the Comments data segment in the Manual Retry stage.

The Comments data segment allows you to post your overall comments for the Manual Retry stage.

Upon clicking **Next** in the **Manual Retry - Property** screen, the Comments data segment is displayed.

**Figure 4-7 Manual Retry - Comments**

1. Type your comments for the Manual Retry stage in the **Comments** text box.
2. Click **Post**.  
Comments are posted below the **Comments** text box.
3. To manually handoff the review details, click **Submit**.  
The **Checklist** window is displayed.

**Figure 4-8 Enrichment - Checklist**

 **Note:**

Checklist can be configured for each stage of a process in Business Process Maintenance screen. Refer **Credit Facilities Process Maintenance User Guide** for more information.

4. Manually verify all the checklist and enable the corresponding check box.
5. Select the **Outcome** as **PROCEED** and click **Submit**.

Collateral insurance details are handed off to the back office system.

 **Note:**

Manual Retry task is generated until successful hand off of review details. You must carefully view the error details and fix the handoff errors for successful hand off.