

Oracle® Banking Credit Facilities Process Management Cloud Service Project Management User Guide



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Preface

1.1 Before You Begin

Kindly refer to our getting started user guide for common elements, including Symbols and Icons, Conventions Definitions, and so forth.

1.2 Pre-requisites

Specify the **User ID** and **Password**, and login to **Home** screen.

1.3 Purpose

This guide is designed to help the user to quickly get acquainted with the Customer Standard Instructions maintenance process.

1.4 Acronyms and Abbreviations

The list of the acronyms and abbreviations used in this guide are as follows:

Table 1-1 Acronyms and Abbreviations

Abbreviation	Description
System	Core Maintenance Module
NLP	Natural Language Processing
REST	Representational State Transfer

1.5 Audience

This guide is intended for the central administrator of the Bank who controls the system and application parameters and ensures smooth functionality and flexibility of the banking application.

1.6 Basic Actions

Table 1-2 Basic Actions

Action	Description
Approve	Used to approve the initiated report. This button is displayed, once the user click Authorize .
Audit	Used to view the maker details, checker details, and report status.

Table 1-2 (Cont.) Basic Actions

Action	Description
Authorize	Used to authorize the report created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a report, created by a maker.
Close	Used to close a record. This action is available only when a record is created.
Confirm	Used to confirm the performed action.
Cancel	Used to cancel the performed action.
Compare	Used to view the comparison through the field values of old record and the current record. This button is displayed in the widget, once the user click Authorize .
Collapse All	Used to hide the details in the sections. This button is displayed, once the user click Compare .
Expand All	Used to expand and view all the details in the sections. This button is displayed, once the user click Compare .
New	Used to add a new record. When the user click New , the system displays a new record enabling to specify the required data.
OK	Used to confirm the details in the screen.
Save	Used to save the details entered or selected in the screen.
View	Used to view the report details in a particular modification stage. This button is displayed in the widget, once the user click Authorize .
View Difference only	Used to view a comparison through the field element values of old record and the current record, which has undergone changes. This button is displayed, once the user click Compare .
Unlock	Used to update the details of an existing record. System displays an existing record in editable mode.

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 or the glossary.
<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 Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at Critical Patches, Security Alerts and Bulletins. All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by Oracle Software Security Assurance.

1.9 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.

1.10 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 customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

1.11 Related Resources

For more information on any related features, refer to the following documents

- *Oracle Banking Security Management System User Guide*
- *Routing Hub Configuration User Guide*
- *Oracle Banking Getting Started User Guide*

1.12 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.

1.13 Symbols and Icons

The following icons are used in the screens.

Table 1-3 Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize

Table 1-3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.
	Click this icon to delete an existing row.

Table 1-3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Click to view the created record.
	Click to modify the fields.
	Click to unlock, delete, authorize or view the created record.

Table 1-4 Symbols and Icons - Audit Details

Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status

Table 1-5 Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status

Table 1-5 (Cont.) Symbols ad Icons - Widget

Symbol/Icon	Function
	Closed status
	Authorized status

1.14 Post-requisites

After finishing all the requirements, please log out from the Home screen.

2

Project Management Process

This topic describes introduction about the Project Management Process in OBCFPM.

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

3

Project Definition Enrichment

This topic provides systematic instructions about the Project Definition Enrichment stage in Project Management Process.

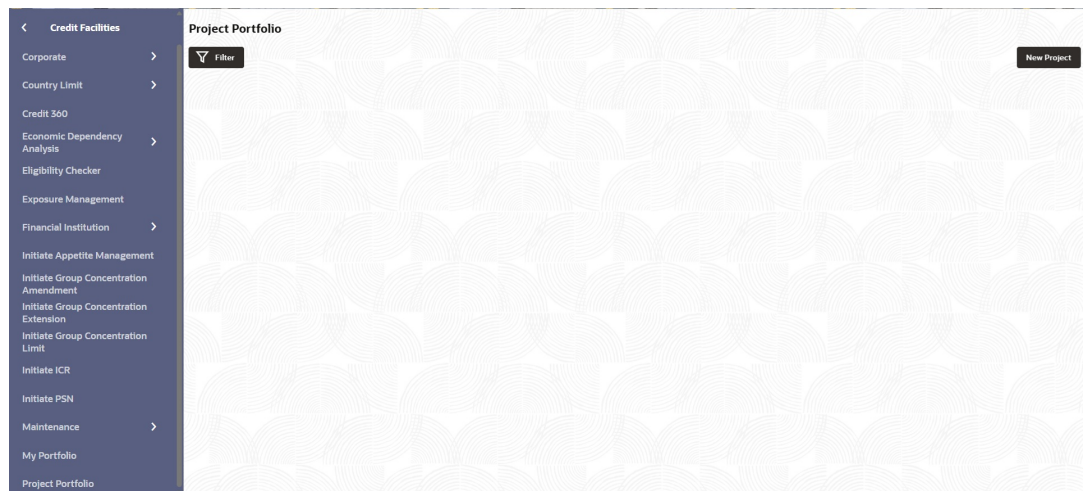
In this stage, you can capture all the details about the customer project, project stakeholders and project milestones.

To initiate the Project Management Process.

1. On **Home** screen, select **Credit Facilities**. Under Credit Facilities, select **Project Portfolio**.

The **Project Portfolio** screen is displayed.

Figure 3-1 Project Portfolio



2. Click **+NEW PROJECT**.

The **New Project** screen is displayed.

Figure 3-2 New Project

3. Specify all the details in the **New Project** window based on description in the below table.

Table 3-1 New Project - Field Description

Field	Description
Application Priority	Choose the project Application Priority . The options available are: Low , Medium , and High .
Application Branch	Search and select the project Application Branch .

Table 3-2 New Project - Project Details - Field Description

Field	Description
Project Name	Type your customer's Project Name .
Project Description	Type a detailed description for project in this field.
Start Date	Click the calendar icon and select Start Date of the project.
End Date	Click the calendar icon and select End Date of the project.
Registration Number	Specify the project Registration Number .
Project Currency	Search and select the Project Currency .
Project Amount	Specify the budget of project in this field.
Status	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
Project Type	Select the Project Type from the drop down list. The options available are: - Govt - Private - Public Private Partnership - Mixed
Point of Contact Name	Specify the Point of Contact Name for the project.

4. Click **Submit**.

The **Enrichment - Project Summary** screen is displayed.

- [Project Summary](#)
This topic describes information about the Project Summary data segment in Project Definition Enrichment stage.
- [Comments](#)
This topic provides systematic instructions about the Comments data segment in the Project Definition Enrichment stage.

3.1 Project Summary

This topic describes information about the Project Summary data segment in Project Definition Enrichment stage.

The Project Summary data segment has the following widgets to add corresponding details:

- Project Details
- Project Stakeholders
- Timelines
- [Adding Project Details](#)
This topic provides systematic instructions about the procedure to add customer's project details in Project Management process.
- [Adding Stakeholder information](#)
This topic provides systematic instructions about the procedure to add project stakeholder information.
- [Adding Project Milestone](#)
This topic provides systematic instructions about the procedure to add project milestone details.

3.1.1 Adding Project Details

This topic provides systematic instructions about the procedure to add customer's project details in Project Management process.

The **Project Definition -Enrichment** screen displays.

Figure 3-3 Project Definition - 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 453278644	Project Type Private	Project Currency USD	Project Value \$100.00K	Parent Project Name
----------------------------------	-------------------------	-------------------------	----------------------------	---------------------

Project Details **Project Stakeholders** **Default Ultimate Paymaster**

No Project details are added [Add Project Details](#)

Number of Stakeholders are added [Add Stakeholder](#)

Time lines

Status: All Start Date: July 25, 2020

No Time lines are added [Add Milestone](#)

Sub Projects

Project Limit Summary

No data to display.

Audit Cancel Hold Save and Close Next

1. Click **Add Project Details** in the **Project Details** widget.

For Project Details, additional placeholder fields can be configured in Maintenance screen. For more information on managing these placeholders, refer to the **Maintenance User Manual**.

- The system supports configuration of up to **20 fields each** for the following data types:
 - Text
 - Numeric
 - Boolean
 - Date

Each field type allows a minimum of 0 and a maximum of 20 fields per project instance, based on the requirements.

- These fields displays in the **Project Details** screen only if they are configured. If no additional fields are defined, the screen will display only the standard project attributes.

For example, we maintained 20 additional fields each for text, numeric, boolean, and date.

The **Project Details** screen is displayed.

Figure 3-4 Project Details

Project Details

Project Name Building Construction	Registration Number 453278644	Project Description Golden quadrilateral Project JU13	Project Currency USD
Project Value \$100,000.00	Status As Per Schedule	Project Type Private	Start Date January 1, 2021
End Date February 7, 2024	Project Objective To develop eastern part of the city	Parent Project Id	Parent Project Name
Phone Number 9848022338	Point of Contact Name John	Email John@xyz.com	
Addition Text 1	Addition Text 2	Addition Text 3	Addition Text 4
Addition Text 5	Addition Text 6	Addition Text 7	Addition Text 8
Addition Text 9	Addition Text 10	Addition Text 11	Addition Text 12
Additional Flag 1 ☐ Yes	Additional Flag 2 ☐ Yes	Additional Flag 3 ☐ Yes	Additional Flag 4 ☐ Yes
Additional Flag 5 ☐ Yes	Additional Flag 6 ☐ Yes	Additional Flag 7 ☐ Yes	Additional Flag 8 ☐ Yes
Additional Flag 9 ☐ Yes	Additional Flag 10 ☐ Yes	Additional Flag 11 ☐ Yes	Additional Flag 12 ☐ Yes
Additional Flag 13 ☐ Yes	Additional Flag 14 ☐ Yes	Additional Flag 15 ☐ Yes	Additional Flag 16 ☐ Yes
Additional Flag 17 ☐ Yes	Additional Flag 18 ☐ Yes	Additional Flag 19 ☐ Yes	Additional Flag 20 ☐ Yes

Customer sector +Add Industry

No Sectors Added

Address

Cancel Save

Note

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

In the **Project Details** window, 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

You can modify the following details, if required:

- Project Currency
- Project Amount
- Status
- Project Type
- Start Date
- End Date
- And all configured additional place holder fields

2. Type the **Project Objective**.

The maximum character limit for the project objective is 450.

3. Type the **Point of Contact Name** for the project.

The maximum character limit for the point of contact name is 35.

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

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

- [Customer Sector](#)

Procedure to add customer sector details.

- [Address](#)

This topic provides systematic instructions about the procedure to add customer's project address details.

3.1.1.1 Customer Sector

Procedure to add customer sector details.

1. To add the project's industry details, click **+Add Industry**.

The **Add Industry** screen is displayed.

Figure 3-5 Add Industry

Add Industry

Sectors

Q e.g Consumer Discretionary

☐ Consumer Discretionary

☐ Consumer Staples

☐ Energy

☐ Financials

☐ Health Care

☐ Industrials

☐ Information Technology

☐ Materials

☒ Real Estate

☐ Telecommunication Services

Industry Groups

Q e.g Real Estate

☒ Real Estate

Industries

Q e.g Equity Real Estate Investment Trusts (REIT)

☐ Equity Real Estate Investment Trusts (REIT)

☒ Real Estate Management

Sub-Industries

Q e.g Diversified Real Estate Activities

☐ Diversified Real Estate Activities

☒ Real Estate Development

☐ Real Estate Operating Companies

☐ Real Estate Services

Cancel

2. Select the project Sector.
Industry Groups list is displayed.
3. Select the project Industry Group.
Industries list is displayed.
4. Select the project Industry.
Sub-Industries list is displayed.
5. Select the project Sub-Industry.
Industry details are added and displayed in the **Customer Sector** section as shown below.

Figure 3-6 Customer Sector

Customer sector +Add Industry

Real Estate

Industry Group
Real Estate

Industry
Real Estate Management

Sub-Industry
Real Estate Development

Edit

Delete

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

3.1.1.2 Address

This topic provides systematic instructions about the procedure to add customer's project address details.

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

- Office
- Residence
- Correspondence

1. Click the Add icon
The **Address Details** screen is displayed.

Figure 3-7 Address Details

For information on fields in the **Address Details** window, refer the below table.

Table 3-3 Address Details - Field Description

Field	Description
Address Type	Select the required Address Type .
Point of Contact	Type the name of Point of Contact person for the selected address.
House/Building name	Specify the House/Building name .
Street name	Specify the name of street where the building is located.
Locality	specify the Locality of the address.
Landmark	Specify the Landmark for the address.
Area	Specify the Area where the address is located.
City	Specify the City where the Area is located.
State	Specify the State where the City is located.
Zip-Code	Specify the Zip-Code of mentioned Area.
Country	Specify the Country where the State is located.
Email Address	Specify the Email Address of the point of contact person.
Phone Number	Specify the Phone Number of the point of contact person.

2. After providing all the details in the **Address Details** window, click **Save**.
The address details are added and displayed as shown below.

Figure 3-8 Project Details - Address

Address

+

Address	Phone Number	Email Address
Office Green I Tech, Rich street, New York, US - 560091.	9848022338	John@xyz.com

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

Edit
Delete
View

Save

3. To **Edit**, **Delete**, and **View** the address, select the corresponding record and click the required option.
4. To save the project details, click **Save** in the **Project Details** window.

3.1.2 Adding Stakeholder information

This topic provides systematic instructions about the procedure to add project stakeholder information.

1. Click **Add Stakeholder** in the **Project Stakeholder** widget.

The **Add Stakeholder** screen is displayed.

Figure 3-9 Add Stakeholder

Add Stakeholder

Customer Details

☐ New ☒ Existing

Customer ID: 000009560

External Customer Number: 000000000000000013761

Type: Customer

Name	Registration Number	Company Type
FIRST APPLICATION	ANRE1243SDF	Pvt Ltd
Date of Incorporation	Demography Type	Place of Incorporation
November 30, 2018	Global	US
	Geographical Spread	
	United States	
Number of Companies		

Address

Cancel Save

2. Specify all the details in the **Add Stakeholder** window based on description in the below table.

Table 3-4 Add Stakeholder - Field Description

Field	Description
Customer Details	If the stakeholder is not your bank's customer, select Customer Details as New . If the stakeholder is already a customer in your bank, select Customer Details as Existing . The Customer ID field is displayed.
Customer ID	Search and select the required Customer ID .
Type	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 .
Name	Type the Name of the stakeholder.
Registration Number	Specify the stakeholder's Registration Number .
Company Type	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
Date of Incorporation	Click the Calendar icon and search the Date of Incorporation .
Demography Type	Select the stakeholder's Demography Type from the drop down list. The options available are: • Domestic • Global
Geographical Spread	If the Demography Type is selected as Global , the Geographical Spread field is displayed. Click and select the countries in which the stakeholder is operating.
Place of Incorporation	Search and select the stakeholder's Place of Incorporation .
No of Companies	Specify the No of Companies associated with the stakeholder.

Address

For information on adding stakeholder's address, refer Address topic in Enrichment chapter.

3. To save the stakeholder information, click **Save** in the **Add Stakeholder** window.

Stakeholder details are listed in the **Project Summary** screen as shown below.

Figure 3-10 Project Summary - Project Stakeholders

Project Summary

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

Registration Number: 453278644 | Project Type: Private | Project Currency: USD | Project Value: \$100.00M | Parent Project Name:

Project Details Update | **Project Stakeholders** Default Ultimate Paymaster Add Stakeholder

Project Objective
Sectors
Real Estate
Point of Contact
John
9848022358
john@xyz.com
Address
Office
Green I Tech,
Rich street,
New York, US-560091

1
Total No of Stakeholders

COS Contractor NEW
Registration Number: 9848022358
Date of Incorporation: January 1, 2020
Company Type: Pvt Ltd
Demography Type: Domestic

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

Edit
Delete
View

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

Note

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.

3.1.3 Adding Project Milestone

This topic provides systematic instructions about the procedure to add project milestone details.

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 **Timelines** widget.

- Click **Add Milestone** in the **Timelines** widget.

The **Add Milestone** screen is displayed.

Figure 3-11 Add Milestone

Add Milestone

Milestone Name: Phase 1

Start Date: September 1, 2025 | End Date: April 30, 2026 | Completion %: 0

Status: Yet To Start

Milestone Description: First Milestone
Enter 1 to 250 characters.

Cancel Save

- Specify the milestone details in the **Add Milestone** window based on description in the below table.

Table 3-5 Add Milestone - Field Description

Field	Description
Milestone Name	Specify the Milestone Name .
Start Date	Click the calendar icon and select the Start Date for the milestone. Start Date can be past or future date.
End Date	Click the calendar icon and select the End Date for the milestone. End Date can be past or future date.
Completion %	Specify the Completion % for the milestone.
Status	Select the project milestone Status from the drop down list. Note: If future date is selected as Start Date and End Date , the Completion % must be 0 and the Status must be Yet To Start.
Milestone Description	Specify the description about the milestone.

3. Click **Save**.

Milestone details are added in the **Timelines** widget as shown below.

Figure 3-12 Timelines

4. To filter a milestone from the Timeline, select the required **Status** and **Start Date**.
5. To go to the **Comments** screen, click **Next**.

3.2 Comments

This topic provides systematic instructions about the Comments data segment in the Project Definition Enrichment stage.

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

Figure 3-13 Enrichment - Comments

1. Type the necessary **Comments**.
2. Click **Post**.
Comments are posted below the **Comments** text box.
3. To submit the Enrichment task to the Approval stage, click **Submit**.
The **Checklist** screen is displayed.

Figure 3-14 Checklist

4. Select the **Outcome** as **Proceed**.
5. Click **Submit**.
The task is moved to the Approval stage.

4

Project Definition Approval

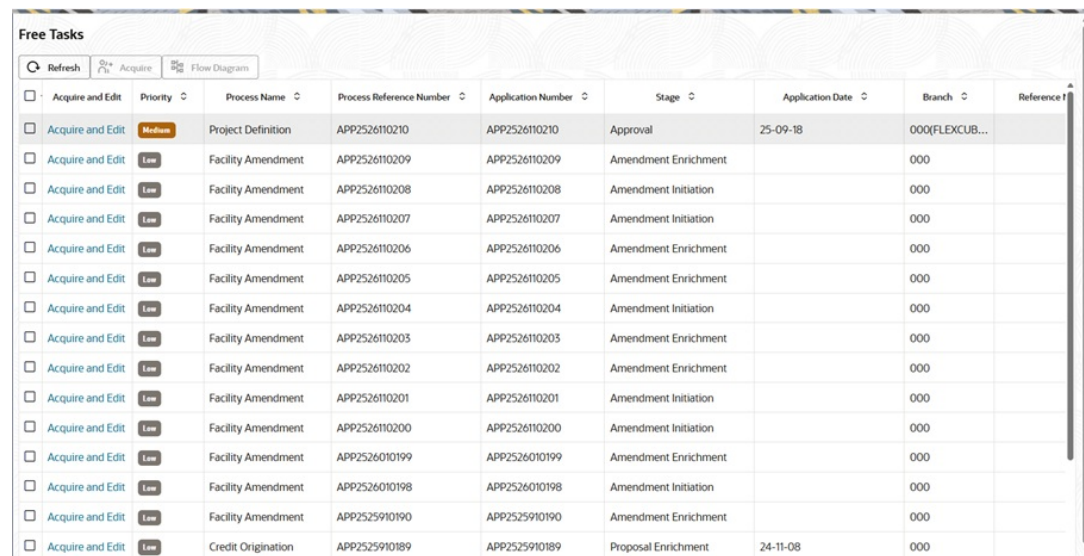
This topic provides systematic instructions about the Project Definition Approval stage in Project Management Process.

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

1. On **Home** screen, select **Tasks**. Under Tasks, select **Free Tasks**.

The **Free Tasks** screen is displayed.

Figure 4-1 Free Tasks



	Priority	Process Name	Process Reference Number	Application Number	Stage	Application Date	Branch	Reference
☐ Acquire and Edit	Medium	Project Definition	APP2526110210	APP2526110210	Approval	25-09-18	000(FLEXCUB...	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110209	APP2526110209	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110208	APP2526110208	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110207	APP2526110207	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110206	APP2526110206	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110205	APP2526110205	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110204	APP2526110204	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110203	APP2526110203	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110202	APP2526110202	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110201	APP2526110201	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526110200	APP2526110200	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526010199	APP2526010199	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2526010198	APP2526010198	Amendment Initiation		000	
☐ Acquire and Edit	Low	Facility Amendment	APP2525910190	APP2525910190	Amendment Enrichment		000	
☐ Acquire and Edit	Low	Credit Origination	APP2525910189	APP2525910189	Proposal Enrichment	24-11-08	000	

2. **Acquire & Edit** the required Approval task.

The **Approval - Project Summary** screen is displayed.

- [Project Summary](#)
This topic provides systematic instructions about the Project Summary data segment in the Project Definition Approval stage.
- [Comments](#)
This topic provides systematic instructions about the Comments data segment in the Project Definition Approval stage.

4.1 Project Summary

This topic provides systematic instructions about the Project Summary data segment in the Project Definition Approval stage.

The Project Summary data segment displays all the project related information added in the Enrichment stage.

Figure 4-2 Approval -Project Summary

Project Definition - Approval

Project Summary

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

Registration Number 453278644	Project Type Private	Project Currency USD	Project Value \$100.00M	Parent Project Name
----------------------------------	-------------------------	-------------------------	----------------------------	---------------------

Project Details [View](#)

Project Objective
Sectors
Real Estate
Point of Contact
John
9848022338
john@xyz.com
Address
Office
Green I Tech,
Rich street,
New York,US-560091

Project Stakeholders

1
Total No of Stakeholders

COS [Contractor](#) [NEW](#)
Registration Number: 9848022338
Date of Incorporation: January 1, 2020
Company Type: Pvt Ltd
Demography Type: Domestic

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Timelines

Status: All Start Date: July 1, 2025

Phase 1

just September October November December January February March April May June July August September October November December January February March April May 2026

2025 2026 2027 2028 2029 2030

Project Limit Summary [View All](#)

Existing Limit \$100.00M Outstanding Limit \$80.00M
--

Audit Cancel Hold Save and Close Next

1. To view full Project Description and Project Objective, click **Read More** in **Project Summary** and **Project Details** widgets.
2. To view the stakeholder details, click the Action icon in corresponding record in the **Project Stakeholders** widget and select **View**.
3. To filter a milestone from the Timeline, select the required **Status** and **Start Date**.
4. To view the Project Aggregation, click **View All** in the **Project Summary** tile.

The following window is displayed.

Figure 4-3 Project Aggregation

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

5. To view the facility details, click on the **Project Id**.
The Facility Details screen is displayed.

Figure 4-4 Facility Details

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	

6. After viewing the Project Summary, click **Next**.
The **Comments** screen is displayed.

4.2 Comments

This topic provides systematic instructions about the Comments data segment in the Project Definition Approval stage.

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

Figure 4-5 Approval - Comments

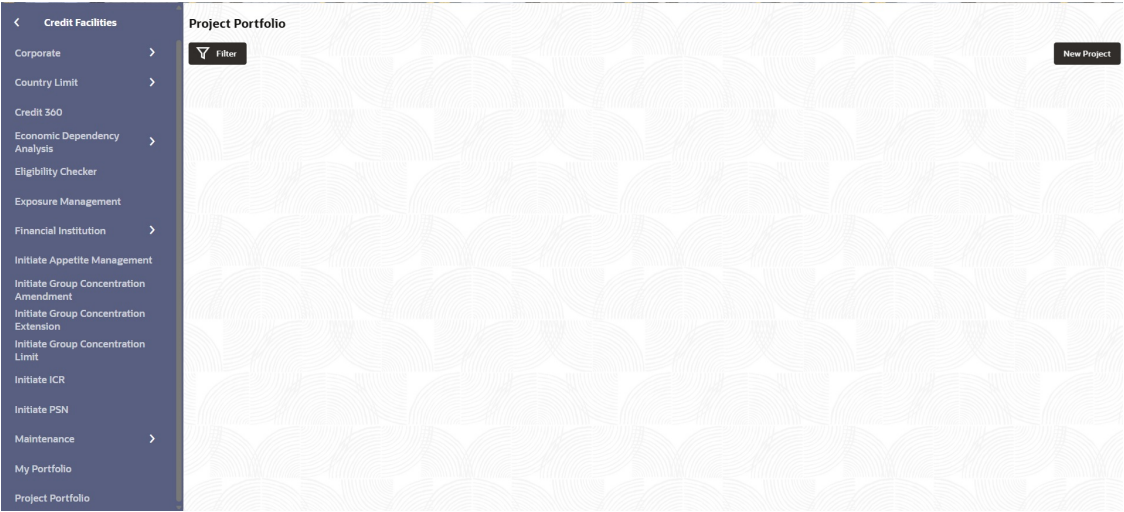
1. Type the necessary **Comments**.
2. Click **Post**.
Comments are posted below the **Comments** text box.
3. To submit the Approval task, click **Submit**.
The **Checklist** window is displayed.

Figure 4-6 Checklist

4. Select the required **Outcome**.
The options available are **Proceed** and **Additional Info**.
5. Click **Submit**.

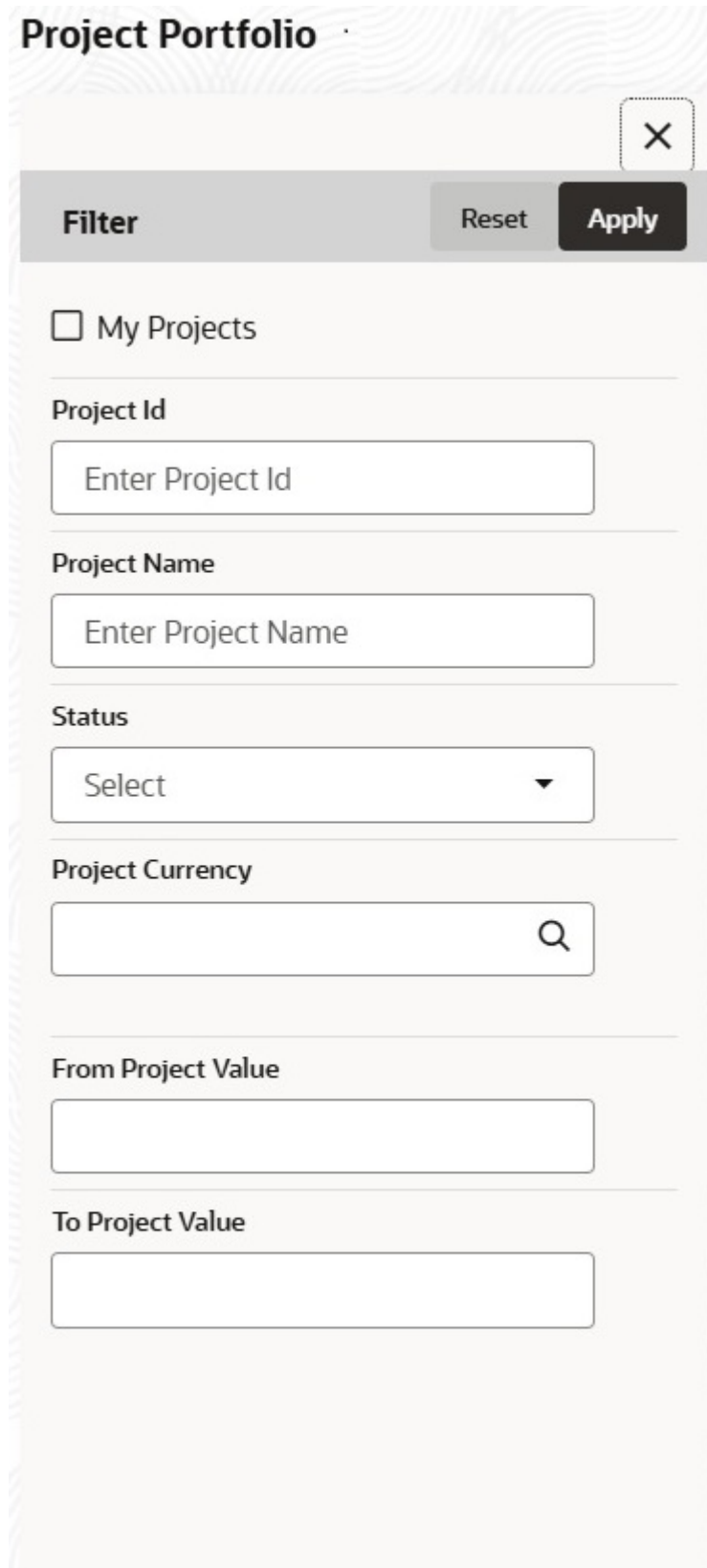
If the **Outcome** is selected as **Proceed**, the Project Management process is completed and the project details are listed in **Project Portfolio** screen as shown below.

Figure 4-7 Project Portfolio



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

Figure 4-8 Filter - Project Portfolio



The screenshot shows a 'Project Portfolio' filter dialog box. At the top right is a close button (X). Below the title bar is a 'Filter' tab, with 'Reset' and 'Apply' buttons to its right. The main area contains several filter options: a checkbox for 'My Projects', a text input for 'Project Id' with placeholder 'Enter Project Id', a text input for 'Project Name' with placeholder 'Enter Project Name', a dropdown menu for 'Status' with 'Select' and a downward arrow, a search input for 'Project Currency' with a magnifying glass icon, a text input for 'From Project Value', and a text input for 'To Project Value'.

Project Portfolio

Filter Reset Apply

☐ My Projects

Project Id

Enter Project Id

Project Name

Enter Project Name

Status

Select ▼

Project Currency

Q

From Project Value

To Project Value

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

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

Upon clicking **Edit** in the **Project Portfolio** screen. The **Edit Project** screen is displayed.

Figure 4-9 Edit Project

Edit Project

Application Priority: ☐ Low ☒ Medium ☐ High Application Branch: 000 - FLEXCUBE UNIVERSAL BRANCH

Project Details

Project Name Building Construction	Project Description Construction of residential building in eastern part of the city	Start Date September 1, 2025	End Date June 27, 2030
Registration Number 453278644	Project Currency USD	Project Value \$100,000,000.00	Status Ahead Of Schedule
Project Type Private	Parent Project Id	Parent Project Name	Percentage Progress
Revised Project Value	Revised Start Date	Revised End Date	

Cancel Submit

9. Modify the project details, if required.

10. Click **Submit**.

The **Enrichment - Project Summary** screen is displayed.

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.

5

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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Glossary

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