

Oracle® Banking Corporate Lending Cloud Service

Getting Started User Guide



Release 14.8.1.0.0
G44204-01
October 2025

ORACLE®

Copyright © 2025, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Purpose	i
Audience	i
Conventions	i
Documentation Accessibility	ii
Diversity and Inclusion	ii
Related Resources	ii
Screenshot Disclaimer	ii

1 Getting Started

1.1 Application Access	1
1.1.1 Sign In	1
1.1.2 Sign Out	2
1.2 Application Environment	3
1.2.1 Screen Environment	4
1.2.1.1 Dashboard	4
1.2.1.2 Summary Screen	5
1.2.1.3 Maintenance Screen	6
1.3 How to's	7
1.3.1 Access the Records	8
1.3.2 View the Records	8
1.3.2.1 Tile View	8
1.3.2.2 Tile View with Context Menu	9
1.3.2.3 List View	10
1.3.2.4 Flip View	11
1.3.3 Search the Records	11
1.3.4 Refresh the Records	12
1.3.5 Create / Configure the Records	12
1.3.6 Edit the Records	12
1.3.7 Copy the Records	13
1.3.8 Unlock the Records	13
1.3.9 Reopen the Records	13
1.3.10 Delete the Records	13

1.3.11	Print the Records	14
1.3.12	Authorize the Records	14
1.3.13	Minimize and Maximize the Records	15
1.3.14	Close the Records	15
1.3.15	Audit the Records	15
1.4	Screen / Dashboard	16
1.4.1	Pagination	16
1.4.2	Mandatory and Optional Fields	16
1.4.3	Configure Tile	17
1.4.4	Remove Tile	18
1.4.5	Reorder Tile	18
1.4.6	Expand Tile	18
1.4.7	Add Tile	18
1.5	Icons	19
1.6	Basic Actions	21
1.7	Common Buttons	22
1.8	Common Fields	23

Index

Preface

This topic contains following sub-topics:

- [Purpose](#)
- [Audience](#)
- [Conventions](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Screenshot Disclaimer](#)

Purpose

This manual is designed to help you quickly get acquainted with the getting started of Oracle Banking Corporate Lending Cloud Service and explains the basic design of Oracle and the common operations that you can follow while using it. The guide must be used as a supplement and must be read in conjunction with Common Core, Security Management System, and other application user guides.

Audience

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

- Customer Service Representatives (CSRs)
- Staff in charge of setting up new products in a bank

Conventions

The following text conventions are used in this document:

Table 1 Conventions

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.

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.

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.

Related Resources

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

- *Oracle Banking Security Management System User Guide*
- *Oracle Banking Common Core User Guide*

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

Getting Started

This topic describes an overview on the Oracle Banking Corporate Lending Cloud Service application and explains basic design of Oracle and the common operations that can follow while using it.

This section contains the following subtopics:

- [Application Access](#)
This topic provides the information about the Application Access for Oracle Banking Corporate Lending Cloud Service.
- [Application Environment](#)
This topic describes about the various fields available in the application environment.
- [How to's](#)
This topic describes about the different types of actions that the user can perform in the application.
- [Screen / Dashboard](#)
This topic describes about the various components in screen / dashboard.
- [Icons](#)
- [Basic Actions](#)
- [Common Buttons](#)
This topic describes the information about all the common buttons used in the application.
- [Common Fields](#)
This topic describes the information about all the common fields used in the application.

1.1 Application Access

This topic provides the information about the Application Access for Oracle Banking Corporate Lending Cloud Service.

The user can access any application using the link provided by the administrator. Contact the administrator for URL and the login credentials. For more information on Users and Roles, refer to **Oracle Banking Security Management System User Guide**.

This topic contains the following subtopics:

- [Sign In](#)
This topic describes the systematic instructions to Sign In to the application.
- [Sign Out](#)
This topic describes the systematic instructions to Sign Out from the application.

1.1.1 Sign In

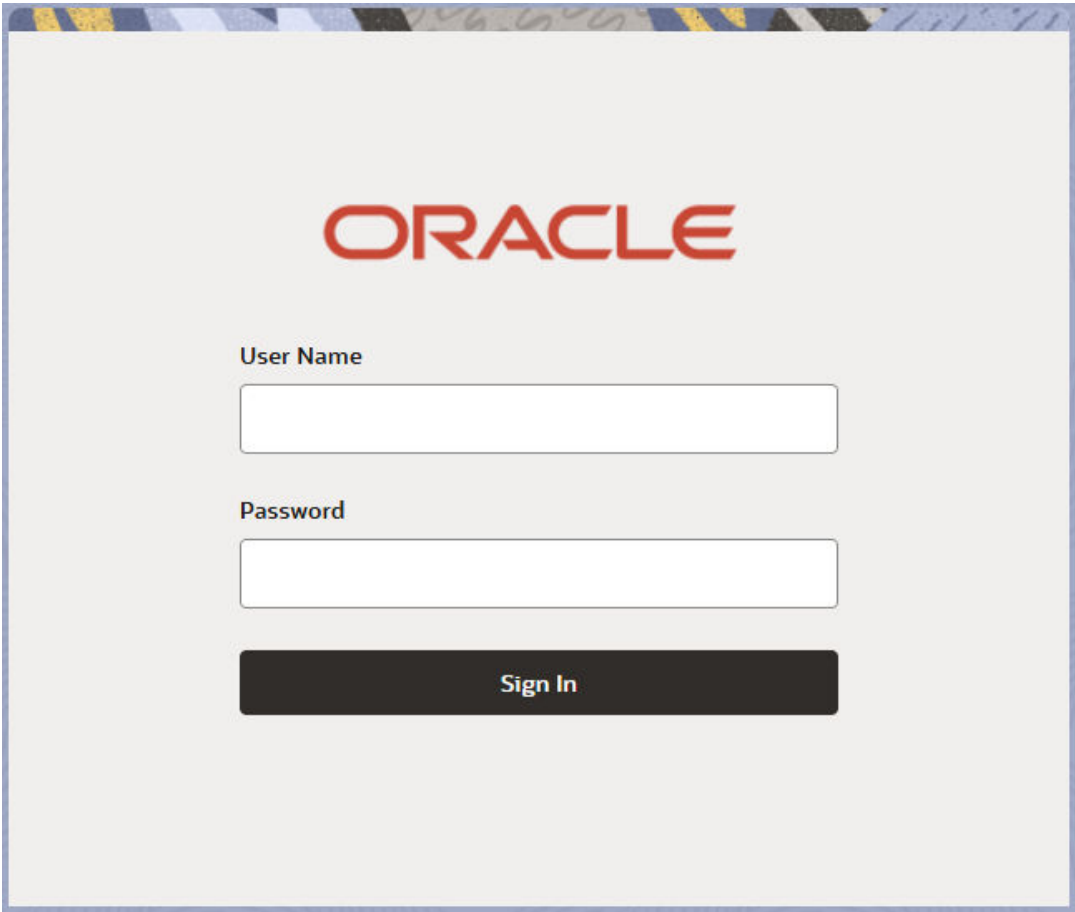
This topic describes the systematic instructions to Sign In to the application.

Make sure that the valid user name and password are created for the user.

1. Specify the URL in the browser address and press **Enter**.

The **Sign In** screen displays.

Figure 1-1 Sign In



- 2. Specify **User Name** and **Password**.
For more information on fields, refer to the field description table.

Table 1-1 Sign In – Field Description

Field	Description
User Name	Specify the user name provided by the administrator.
Password	Specify the password provided by the administrator.

- 3. Click **Sign In** to login to the application.
The **Home** screen displays.

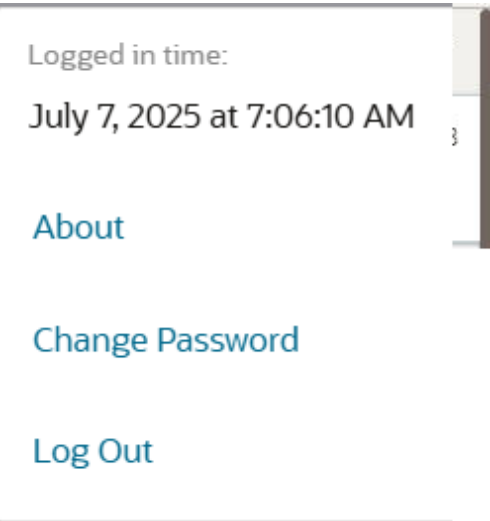
1.1.2 Sign Out

This topic describes the systematic instructions to Sign Out from the application.
Make sure that all the fields are entered and saved.

- 1. In the selected application, navigate to **Toolbar**.
- 2. From toolbar, click user name logged into the application.

The **User Profile** fly-out screen displays.

Figure 1-2 User Profile



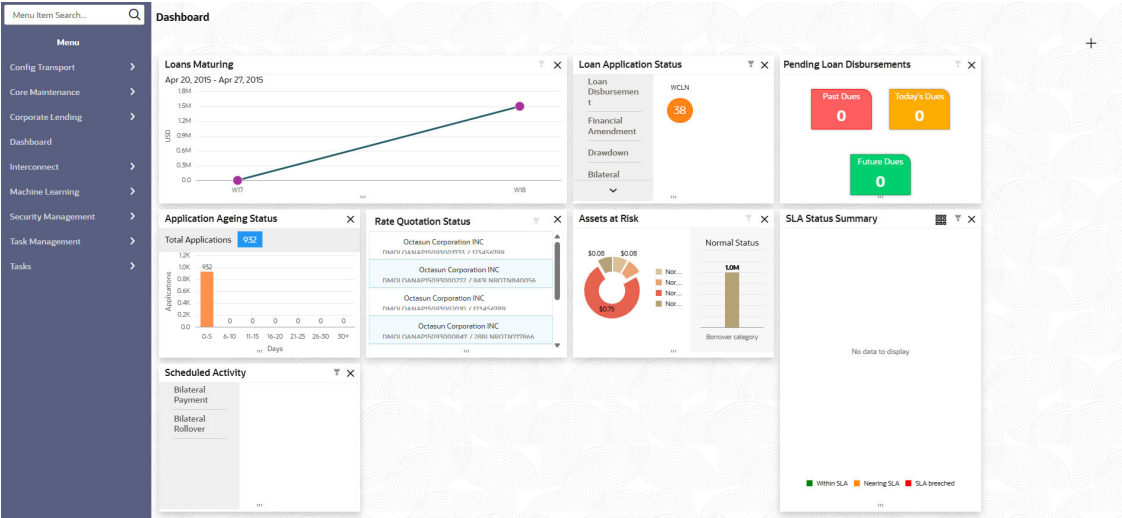
- 3. Click **Log out** to sign out from the application.
The application logs out.

1.2 Application Environment

This topic describes about the various fields available in the application environment.

On successfully login, the application environment screen displays depending on the user privileges.
Here is a sample illustration of the home page.

Figure 1-3 Application Environment



For more information on fields, refer to the field description table.

Table 1-2 Application Environment – Field Description

Field	Description
Hamburger Menu	Click expand/collapse the menu.
Menu	Click to navigate/open the screens associated with the application.
Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards selected using the menu..
Bank Name	Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user. Note: Depending on the logged in user and the branches associated, the user can switch between branches and view the records.
Branch Code	Displays the branch associated with the bank.
Application Date	Displays the last performed application date of branch's EOD.
User Profile	Displays the user profile related options and actions.

This topic contains the following subtopics:

- [Screen Environment](#)
This topic describes about the various components in the screen environment.

1.2.1 Screen Environment

This topic describes about the various components in the screen environment.

This topic contains the following subtopics:

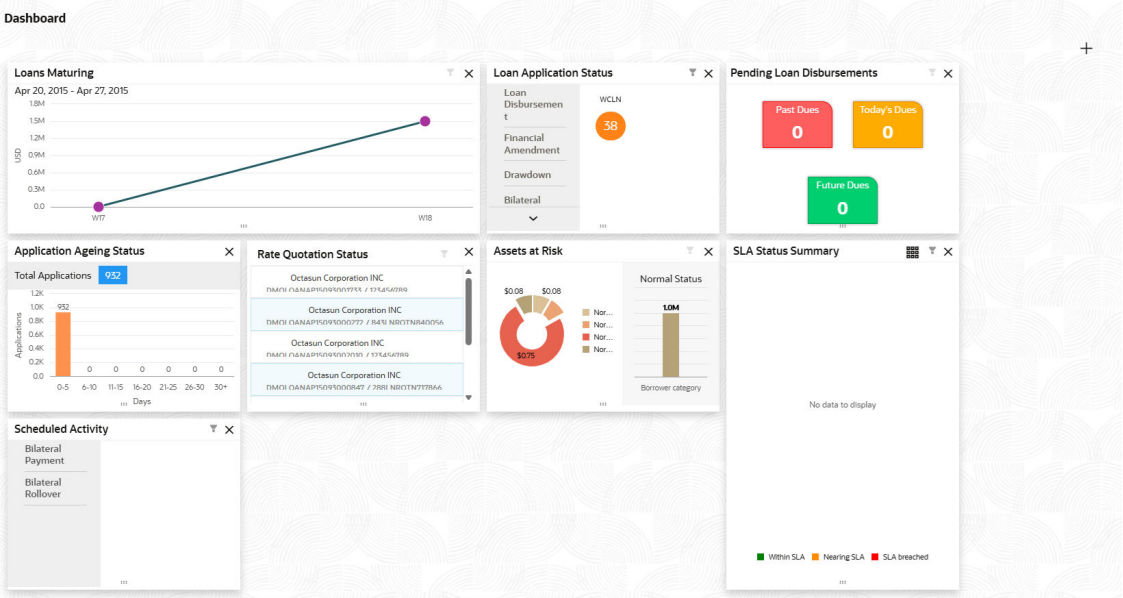
- [Dashboard](#)
This topic describes about the various components on the dashboard.
- [Summary Screen](#)
This topic describes about the various components on the summary screen.
- [Maintenance Screen](#)
This topic describes about the various components in the maintenance screen.

1.2.1.1 Dashboard

This topic describes about the various components on the dashboard.

Depending on the access/permission provided to the logged-in user, the user can view the dashboards associated with the user. These dashboard helps the user to analyse the situation and take the necessary actions.

Figure 1-4 Dashboard

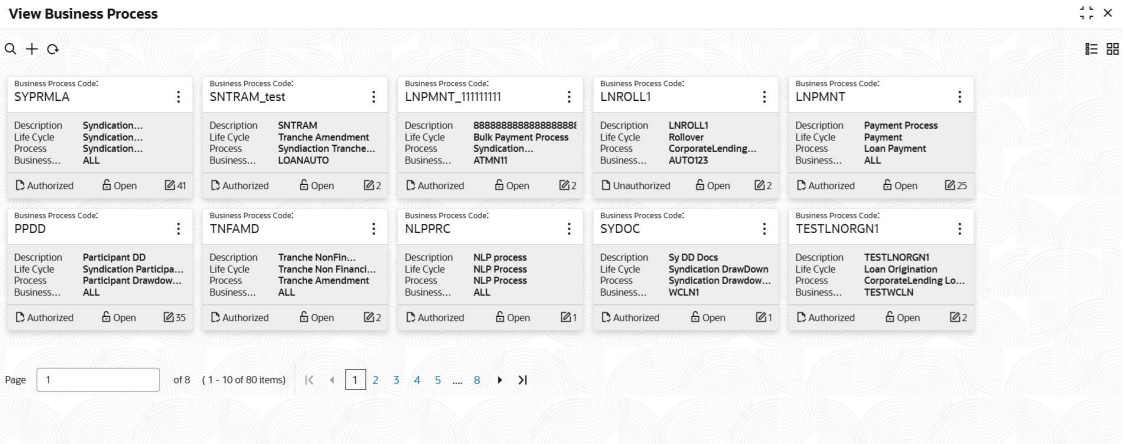


1.2.1.2 Summary Screen

This topic describes about the various components on the summary screen.

Depending on the access/permission provided to the logged in user, the user can access the summary screen. The summary screen provides the information about the configured records, where the user can perform few common actions and view the records.

Figure 1-5 Summary Screen



For more information, refer to the table below.

Table 1-3 Summary Screen – Field Description

Field	Description
Search	Click to search/view a record.
Refresh	Click to refresh all configured records.
Add	Click to create/configure a new record.
Pagination	Displays the number of items available and its page numbers.
Title bar	Displays the name of the screen, minimize, and remove actions. For more information, refer to Minimizing Records and Closing Records .
Records	Displays the configured records. The user can view the records in different format. For more information, refer to Viewing Records .
Tile view	Displays the configured records in the tile format.
List view	Displays the configured records in the list format.

1.2.1.3 Maintenance Screen

This topic describes about the various components in the maintenance screen.

Depending on the access/permission provided to the logged-in user, the user can access the create screen. The create screen allows the user to create/configure the new records using the fields associated with the selected create screen. These new records can also be saved.

Figure 1-6 Maintenance Screen

For more information on fields, refer to the field description table.

Table 1-4 Maintenance Screen – Field Description

Field	Description
Fields	Displays the fields associated with the selected create screen. There are several types of fields such as text box, drop-down, and so on. These fields are either mandatory or options fields. For more information, refer to Mandatory and Optional Fields .

Table 1-4 (Cont.) Maintenance Screen – Field Description

Field	Description
Tile bar	Displays the name of the screen, minimize, and remove actions. For more information, refer to Minimizing Records and Closing Records .
Save	Click to save the entered details.
Cancel	Click to cancel the entered details.

1.3 How to's

This topic describes about the different types of actions that the user can perform in the application.

As a new user, the user needs to perform a set of tasks that are similar in all the screens such as view, edit, delete existing records, and more.

When the user is working with records, it is important to remember that any records that user create, view, edit, delete, and more are determined by administrator settings such as user profile or permission set. Work with the administrator to ensure that the user has access to the records and data.

Now, the user has learned how to work with your records, the user might want to explore more advanced features.

This topic contains the following subtopics:

- [Access the Records](#)
This topic describes the systematic instructions to access the records.
- [View the Records](#)
This topic describes about the various formats to view the records.
- [Search the Records](#)
This topic describes the systematic instructions to search the records.
- [Refresh the Records](#)
This topic describes the systematic instructions to refresh the records.
- [Create / Configure the Records](#)
This topic describes the systematic instructions to create / configure the records.
- [Edit the Records](#)
This topic describes the systematic instructions to edit the record.
- [Copy the Records](#)
This topic describes the systematic instructions to copy the record.
- [Unlock the Records](#)
This topic describes the systematic instructions to unlock the record.
- [Reopen the Records](#)
This topic describes the systematic instructions to reopen the record.
- [Delete the Records](#)
This topic describes the systematic instructions to delete the record.
- [Print the Records](#)
This topic describes the systematic instructions to print the record.

- [Authorize the Records](#)
This topic describes the systematic instructions to authorize the record.
- [Minimize and Maximize the Records](#)
This topic describes the systematic instructions to minimize and maximize the screen.
- [Close the Records](#)
This topic describes the systematic instructions to close the record.
- [Audit the Records](#)
This topic describes the systematic instructions to audit the record.

1.3.1 Access the Records

This topic describes the systematic instructions to access the records.

The user can access the screens on the permissions/rights provided for the user.

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

1. Navigate to the hamburger menu.
By default, the hamburger menu is expanded.
2. Click <sub-menu>, and click <name of the screen>.
The screens associated with the sub-menu displays.
3. Click create <name of the screen>.
The create <name of the screen> screen displays. The user can create/configure the new records.
4. Click view <name of the screen>.
The view <name of the screen> screen displays. The user can view the configured records.

1.3.2 View the Records

This topic describes about the various formats to view the records.

The user can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster.

The various formats to view the records are as follows:

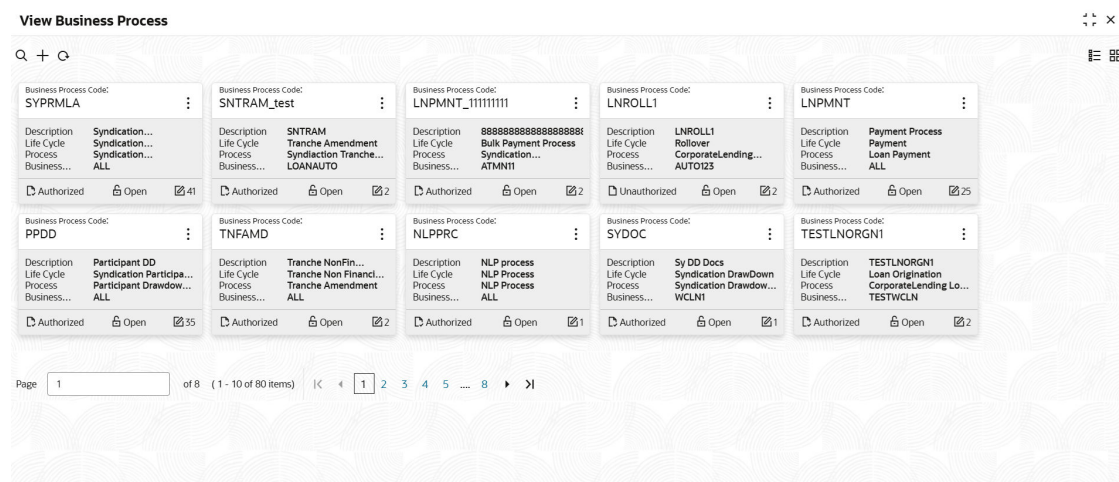
- [Tile View](#)
This topic describes about view the record in tile view.
- [Tile View with Context Menu](#)
This topic describes about view the record in tile view with context menu.
- [List View](#)
This topic describes systematic instructions to view the record in list view.
- [Flip View](#)
This topic describes the systematic instructions to view the record in flip view.

1.3.2.1 Tile View

This topic describes about view the record in tile view.

The default summary view of the records are tile view. Displays the configured records in a tile format with few key fields that are associated with the screen. The user can click a tile to open a record in a full screen and view the details.

Figure 1-7 Tile View



1.3.2.2 Tile View with Context Menu

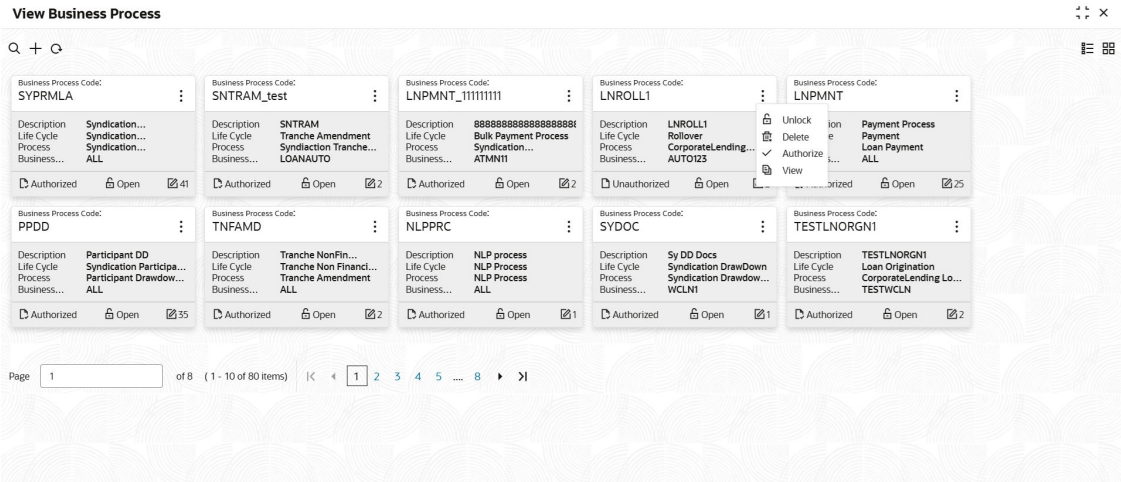
This topic describes about view the record in tile view with context menu.

Tile view with context menu is similar to any tile view summary record. The context menu allows the user to perform any actions that are associated with the records.

The content menu is available for:

- View Account Input
- View Account Closure
- View Account Product
- View Internal Credit Line
- View Line Account Linkage
- View Bank Parameters
- View Virtual Entity
- View Corporate Specific Account Number Range

Figure 1-8 Tile View with Context Menu



For more information on fields, refer to the field description table.

Table 1-5 Tile View with Context Menu - Field Description

Field	Description
Context Menu	This button appears only to a select the number of screens. The context menu allows the user to perform actions that are associated with the record.
Context Menu Flyout	A list of all actions displays. The list of actions depend on the status of the record.

1.3.2.3 List View

This topic describes systematic instructions to view the record in list view.

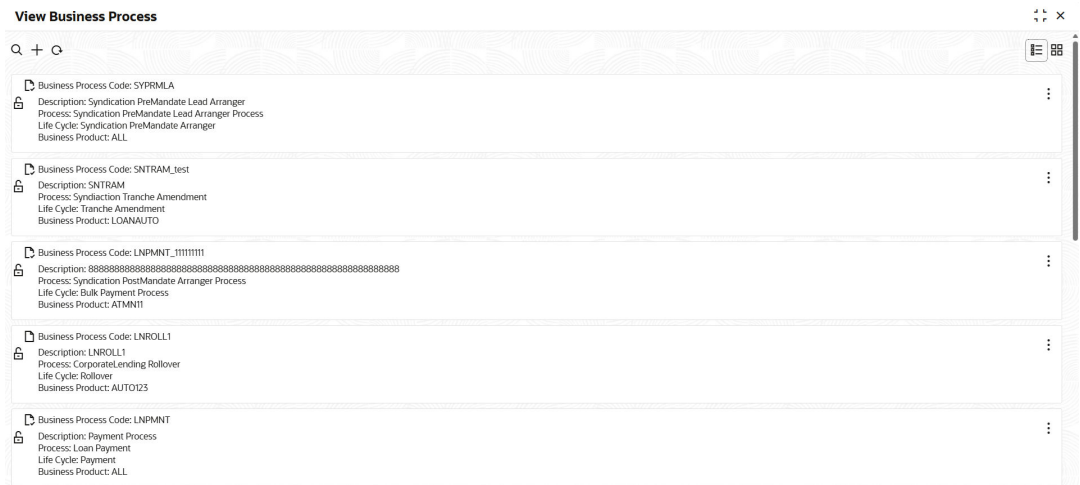
Specify **User ID** and **Password**, and login to **Home** screen.

The list view displays the configured records in a list format.

- 1. Navigate to **View** screen.
- 2. Click **List View** on the action toolbar to view the details.

The details in the screen displays in list view.

Figure 1-9 List View



1.3.2.4 Flip View

This topic describes the systematic instructions to view the record in flip view.

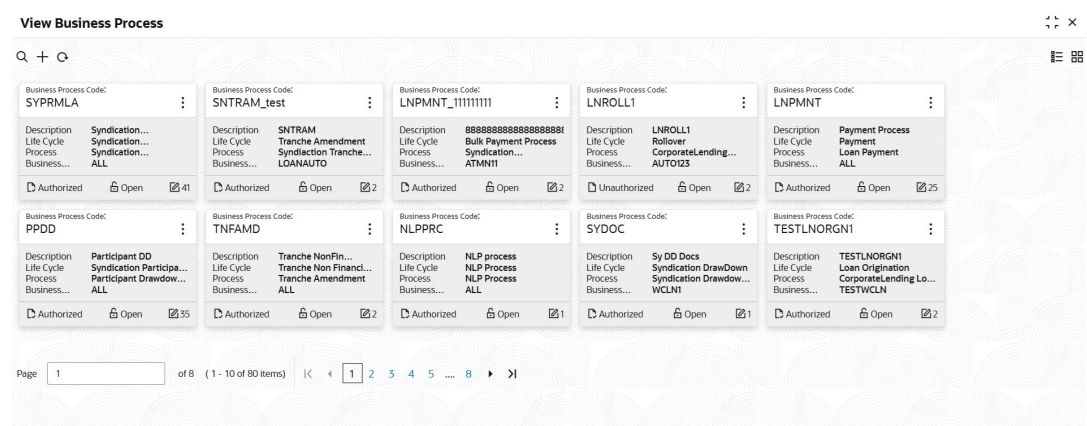
Specify **User ID** and **Password**, and login to **Home** screen.

The list view displays the additional information associated with the configured records in a flip view.

1. Navigate to **View** screen.
2. Click **Flip View** on the record tile to view the details.

The details in the screen displays.

Figure 1-10 Flip View



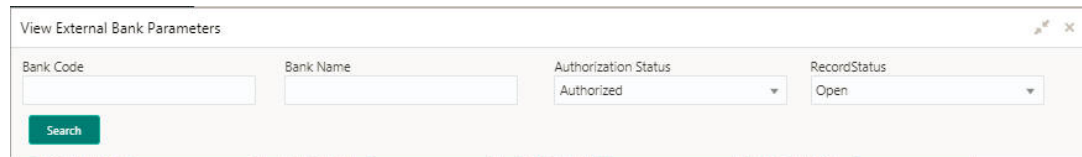
1.3.3 Search the Records

This topic describes the systematic instructions to search the records.

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

1. Navigate to **View** screen.
2. Click **Search** button.
The fields associated with the screen displays.

Figure 1-11 Search



3. Specify the required fields.
4. Click **Search**.
The requested record displays.

1.3.4 Refresh the Records

This topic describes the systematic instructions to refresh the records.

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

1. Navigate to **View** screen.
2. Click **Refresh**.

The records associated with the screen is updated with the latest details.

1.3.5 Create / Configure the Records

This topic describes the systematic instructions to create / configure the records.

The user can create / configure records in any of the three ways:

1. In the selected **View** screen, click **Add** to create / configure a record.
2. In the selected **View** screen, click on a **configured record** and click **New** to create / configure a record.
3. On the **menu**, select a **sub-menu** and click **<Create name of the screen>**.

1.3.6 Edit the Records

This topic describes the systematic instructions to edit the record.

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

Note

Ensure you have the privileges and know the guidelines to modify the records.

1. Navigate to **View** screen.
2. Click the **Record** that need to edit.
3. In a selected screen, click a record and make the required changes to the record.
4. Click **Save**.

The modified record is saved.

1.3.7 Copy the Records

This topic describes the systematic instructions to copy the record.

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

1. Navigate to **View** screen.
2. Click the record that need to copy.
3. Click **Copy** to copy the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

1.3.8 Unlock the Records

This topic describes the systematic instructions to unlock the record.

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

1. Navigate to **View** screen.
2. Click the record that need to unlock.
3. Click **Unlock** to unlock the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

1.3.9 Reopen the Records

This topic describes the systematic instructions to reopen the record.

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

1. Navigate to **View** screen.
2. Click the record that need to reopen.
3. Click **Reopen**.
The **Confirmation** screen appears.
4. Specify a remark.
5. Click **Confirm** to reopen the record.

1.3.10 Delete the Records

This topic describes the systematic instructions to delete the record.

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

Note

Make sure that the records have privileges and know the guidelines for deleting the records.

1. Navigate to **View** screen.
2. Click the record that need to delete.
3. Click **Delete**.

The selected record is deleted.

1.3.11 Print the Records

This topic describes the systematic instructions to print the record.

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

1. Navigate to **View** screen.
2. Click the record that need to print.
3. Click **Print** to view the record in a print format.

The selected record is printed.

1.3.12 Authorize the Records

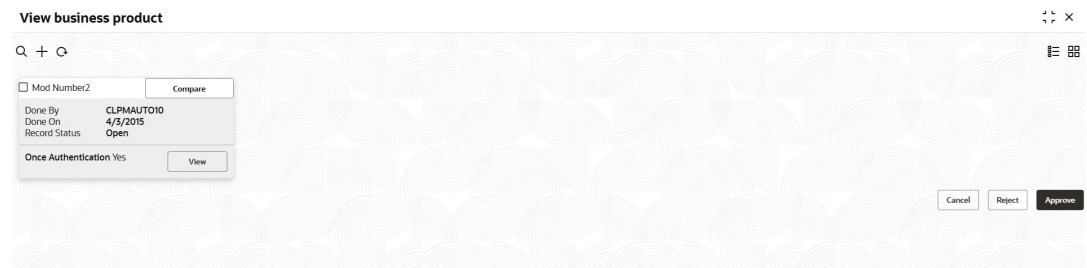
This topic describes the systematic instructions to authorize the record.

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

1. Navigate to **View** screen.
2. Click the record that need to authorize.
3. Click **Authorize**.

The authorized records associated with the screen displays.

Figure 1-12 Authorize



4. Select the required record that must be authorized.
5. Click **Approve** to authorize the record.

1.3.13 Minimize and Maximize the Records

This topic describes the systematic instructions to minimize and maximize the screen.

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

1. Navigate to **View** screen.
2. Click **Collapse** to minimize the screen.

The minimized screen displays at the bottom left corner of the screen.

3. Click **Maximize** button to maximize the screen.

The screen is maximized.

1.3.14 Close the Records

This topic describes the systematic instructions to close the record.

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

1. Navigate to **View** screen.
2. Click **Remove** button to close the record.

The selected record is closed.

Note

If the user is in the middle of creating/modifying the records, an error/warning message displays prompting to save the changes.

1.3.15 Audit the Records

This topic describes the systematic instructions to audit the record.

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

1. Navigate to **View** screen.
2. Click **Audit** to view the change history of the record.

The audit detail screen displays.

Figure 1-13 Audit

Maker	Checker
 OBTFFPM09	
 5/5/2021, 8:12:13 AM	
Status	Modification No
 Authorized	1
 Open	

- Click on the screen to close the audit detail screen.

1.4 Screen / Dashboard

This topic describes about the various components in screen / dashboard.

This topic contains the following subtopics:

- [Pagination](#)
This topic describes about the pagination details in the screen.
- [Mandatory and Optional Fields](#)
This topic describes about mandatory and optional fields in the screen.
- [Configure Tile](#)
This topic describes the systematic instructions to configure the tile.
- [Remove Tile](#)
This topic describes the systematic instructions to remove the tile.
- [Reorder Tile](#)
This topic describes the systematic instructions to reorder the tile.
- [Expand Tile](#)
This topic describes the systematic instructions to expand the tile.
- [Add Tile](#)
This topic describes the systematic instructions to add the tile.

1.4.1 Pagination

This topic describes about the pagination details in the screen.

The pagination displays the number of records on the bottom left corner of the selected view screen. The number of pages appears depending on the records available. The user can navigate to the first page, last page, previous page, or next page by using the number options.

1.4.2 Mandatory and Optional Fields

This topic describes about mandatory and optional fields in the screen.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the asterisk (*) symbol. If the user tries to save the record without

providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.

1.4.3 Configure Tile

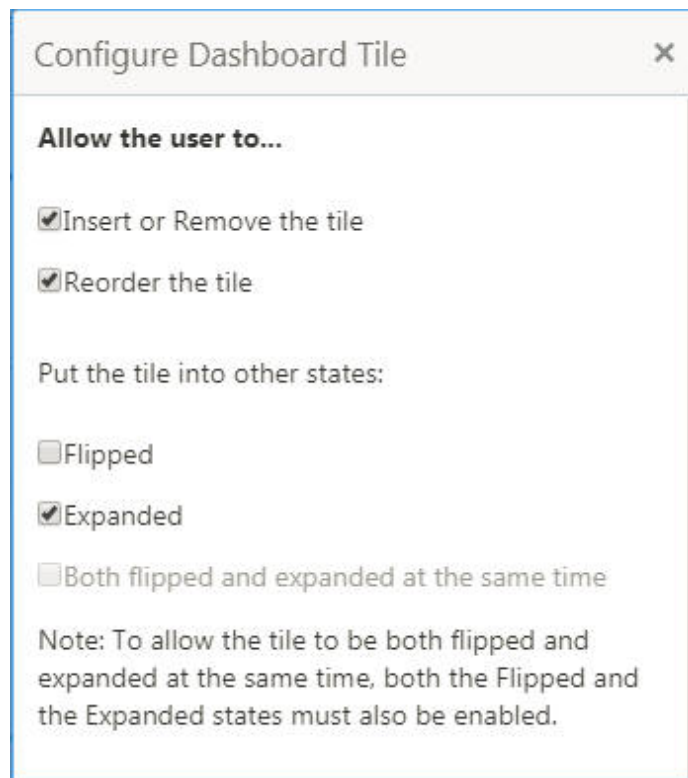
This topic describes the systematic instructions to configure the tile.

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

1. On the Dashboard, click **Configure Tile**.

The **Configure Dashboard Tile** pop-up displays.

Figure 1-14 Configure Dashboard Tile



2. On **Configure Dashboard Tile**, select the required options.

For more information on fields, refer to the field description table.

Table 1-6 Configure Dashboard Tile

Field	Description
Insert or Remove the tile	If selected, the user can remove the dashboard widget from the dashboard-landing page.
Reorder the tile	If selected, the user can rearrange the dashboard widget in the dashboard-landing page.
Flipped	If selected, the user can flip the dashboard widget for more information.
Expanded	If selected, the user can expand the dashboard widget in the dashboard landing page.

Table 1-6 (Cont.) Configure Dashboard Tile

Field	Description
Both flipped and expanded at the same time	If selected, the user can flip and expand the dashboard widget in the dashboard landing page.

3. Click **Close** button to update the dashboard widget configuration.

1.4.4 Remove Tile

This topic describes the systematic instructions to remove the tile.

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

- Click **Remove** to remove the dashboard widget from the landing page.
The removed widgets are available under the **Add Tiles** option.

1.4.5 Reorder Tile

This topic describes the systematic instructions to reorder the tile.

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

- Select and drag the **Drag to Reorder** to drop the dashboard widget at the desired place.
The page is automatically refreshed and displays the updated order.

1.4.6 Expand Tile

This topic describes the systematic instructions to expand the tile.

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

- Click **Expand Tile** to view all the information of the dashboard widget.
The expanded widget displays on a complete row to view more information.

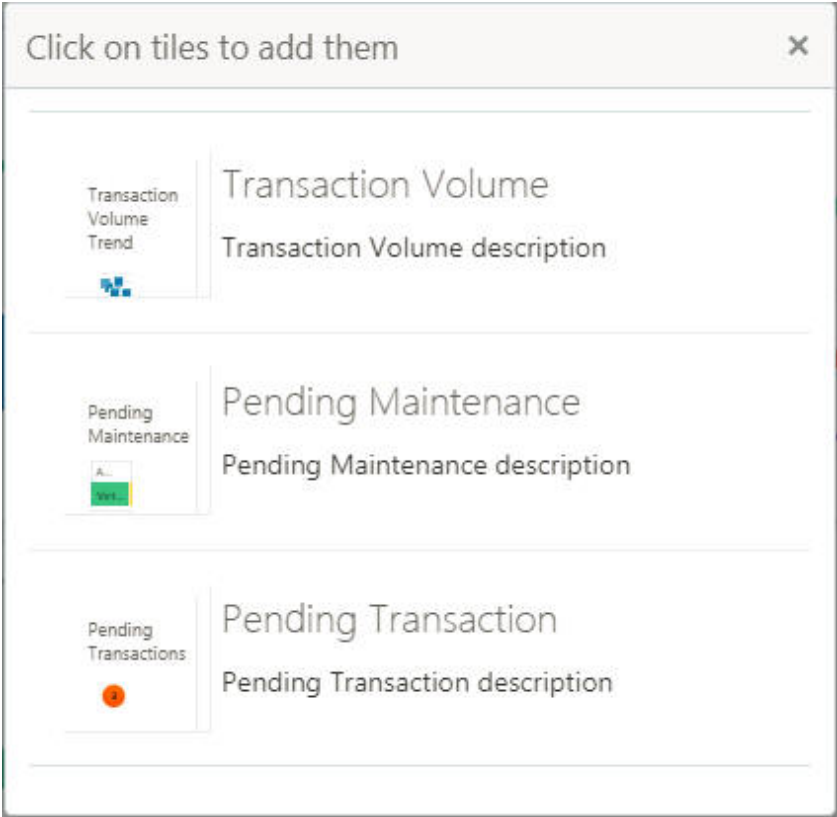
1.4.7 Add Tile

This topic describes the systematic instructions to add the tile.

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

1. Click **Add Tiles to Dashboard** to add more available dashboard widget to the dashboard landing page.
The **Click on tiles to add them** screen displays.

Figure 1-15 Click on tiles to add them



- 2. Click on the dashboard that the user wants to add to the dashboard-landing page. The page is automatically refreshed and displays the added dashboard widget.

1.5 Icons

The following Icons are used in the screens.

Table 1-7 Icons - Common

Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record

Table 1-7 (Cont.) Icons - Common














Icon	Function
	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
	Calendar
	Copy a record
	Click to view the created record.
	Click to unlock, delete, authorize or view the created record.
	Toggle ON
	Toggle OFF

Table 1-8 Icons - Audit Details



Icon	Function
	A user
	Date and time

Table 1-8 (Cont.) Icons - Audit Details







Icon	Function
	Unauthorized or Closed status
	Authorized or Open status

Table 1-9 Icons - Widget

Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status

1.6 Basic Actions

Table 1-10 List of Basic Actions

Action	Description
Approve	Click Approve to approve the initiated report. This button is displayed, once the user click Authorize .
Audit	Click Audit to view the maker details, checker details of the particular record, and record status. This button is displayed only for the records that are already created.
Authorize	Click Authorize to authorize the record created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a record. This button is displayed only for the already created records.
Close	Click Close to close a record. This action is available only when a record is created.
Confirm	Click Confirm to confirm the performed action.
Cancel	Click Cancel to cancel the performed action.
Compare	Click Compare 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 .

Table 1-10 (Cont.) List of Basic Actions

Action	Description
Collapse All	Click Collapse All to hide the details in the sections. This button is displayed, once the user click Compare .
Expand All	Click Expand All to expand and view all the details in the sections. This button is displayed, once the user click Compare .
New	Click New to add a new record. The system displays a new record to specify the required data. (Note: The fields which are marked with Required are mandatory.)
OK	Click OK to confirm the details in the screen.
Save	Click Save to save the details entered or selected in the screen.
View	Click View 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	Click View Difference only 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 .

1.7 Common Buttons

This topic describes the information about all the common buttons used in the application.

The list of common buttons are as follows.

Table 1-11 List of Buttons

Button	Description
New	Creates a new record for the selected screen.
Query	View all the configured records for the selected screen.
Unlock	Unlock the configured record for the selected screen.
Search	Search the configured record and select the required record for the selected screen.
Copy	Copy the configured record, modify the details, and save with a different name for the record.
Delete	Remove the configured record for the selected screen.
Reopen	Reopens a closed record for the selected screen.
Close	Closes the configured record for the selected screen.
Print	Print view the configured record for the selected screen.
Authorize	Authorize the configured record for the selected screen.
Collapse	Minimizes the opened screen to the bottom left corner of the screen.
Remove	Closes the opened screen.
Audit	Check the history of the configured records for the selected screen.
Save	Save the configured record for the selected screen.
Cancel	Discard the configured record before saving it.
+	Add a row in the grid to provide the required record for the selected screen.
-	Remove a row in the grid for the selected screen.
>	Select a record and move it to the required selected list grid.

Table 1-11 (Cont.) List of Buttons

Button	Description
<	Select a record and move it back to the available list grid.
>	Move all the available list of records to the selected list of grid.
<	Move back all the selected list of records to the available list of grid.

1.8 Common Fields

This topic describes the information about all the common fields used in the application.

The list of common fields are as follows.

Table 1-12 Common Fields

Fields	Description
Branch Code	The user can select a configured branch code which the user wants to associate with the selected screen.
Maker	Displays the name of the logged in user who created the record.
Customer Number	The user can select a configured customer number which the user wants to associate with the selected screen. The user can configure the customer number using the Create External Customer screen.
Account Number	The user can select a configured account number which the user wants to associate with the selected screen. The user can configure the account number using the Create External Customer Account screen.
Source System	The user can select a configured source system which the user wants to associate with the selected screen. The user can configure the source system using the Create Upload Source screen.
Host Code	The user can select a configured host code which the user wants to associate with the selected screen. The user can configure the host code using the Create Host Code screen.
Currency	The user can select a configured currency which the user wants to associate with the selected screen. The user can configure the currency using the Create Currency Definition screen.
Status	Displays the status of the record: <ul style="list-style-type: none"> • Authorized: The record is verified and authorized. • Unauthorized: The record is not verified. • Open: The record is open and waiting for verification. • Locked: The record is locked. • Closed: The record is closed.

Index

A

Access Application, [1](#)
Access the Records, [8](#)
Add Tile, [18](#)
Application Environment, [3](#)
Audit the Records, [15](#)
Authorize the Records, [14](#)

C

Close the Records, [15](#)
Common Buttons, [22](#)
Common Fields, [23](#)
Configure Tile, [17](#)
Copy the Records, [13](#)
Create / Configure the Records, [12](#)

D

Dashboard, [4](#)
Delete the Records, [13](#)

E

Edit the Records, [12](#)
Expand Tile, [18](#)

F

Flip View, [11](#)

H

How to's, [7](#)

L

List View, [10](#)

M

Maintenance Screen, [6](#)
Mandatory and Optional Fields, [16](#)
Minimize and Maximize the Records, [15](#)

P

Pagination, [16](#)
Print the Records, [14](#)

R

Refresh the Records, [12](#)
Remove Tile, [18](#)
Reopen the Records, [13](#)
Reorder Tile, [18](#)

S

Screen / Dashboard, [16](#)
Screen Environment, [4](#)
Search the Records, [11](#)
Sign In, [1](#)
Sign Out, [2](#)
Summary Screen, [5](#)

T

Tile View, [8](#)
Tile View with Context Menu, [9](#)

U

Unlock the Records, [13](#)

V

View the Records, [8](#)