

# Oracle® Banking Credit Facilities Process Management Cloud Service Collateral 360 User Manual



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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# 1

## 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
<b>Approve</b>	Used to approve the initiated report. This button is displayed, once the user click <b>Authorize</b> .
<b>Audit</b>	Used to view the maker details, checker details, and report status.

Table 1-2 (Cont.) Basic Actions

Action	Description
<b>Authorize</b>	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.
<b>Close</b>	Used to close a record. This action is available only when a record is created.
<b>Confirm</b>	Used to confirm the performed action.
<b>Cancel</b>	Used to cancel the performed action.
<b>Compare</b>	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 <b>Authorize</b> .
<b>Collapse All</b>	Used to hide the details in the sections. This button is displayed, once the user click <b>Compare</b> .
<b>Expand All</b>	Used to expand and view all the details in the sections. This button is displayed, once the user click <b>Compare</b> .
<b>New</b>	Used to add a new record. When the user click <b>New</b> , the system displays a new record enabling to specify the required data.
<b>OK</b>	Used to confirm the details in the screen.
<b>Save</b>	Used to save the details entered or selected in the screen.
<b>View</b>	Used to view the report details in a particular modification stage. This button is displayed in the widget, once the user click <b>Authorize</b> .
<b>View Difference only</b>	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 <b>Compare</b> .
<b>Unlock</b>	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
<b>boldface</b>	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 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.

## 1.9 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.

## 1.10 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*

## 1.11 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.

## 1.12 Post-requisites

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

# 2

## Collateral 360

### 2.1 Collateral 360

This topic describes about the Collateral 360 interface in OBCFPM.

Collateral 360 is a smart dashboard which displays different dimensions of the customer collaterals in graphical and table formats. Dimensions of collaterals include covenant compliance status, valuation details, collateral related transactions, and linked facilities. With the information available in Collateral 360, you can easily track the performance of collateral and take necessary actions to mitigate security risks.

1. To launch the **Collateral 360** screen, navigate to Collaterals > Collateral 360 from the left menu.



2. **Select Customer ID** to view collaterals of required customer.

Collateral details are fetched and displayed in the following widgets.

- Collateral Covenant Compliance
- Overall Collateral
- Collateral Valuation List
- Transactions
- Facility Summary

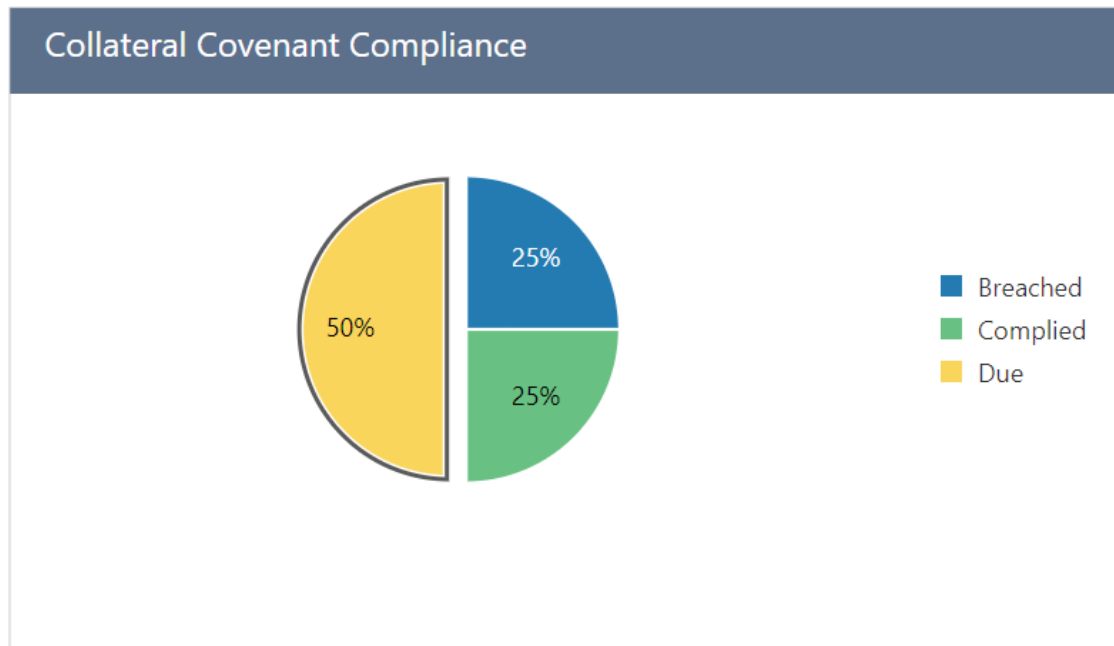
For more information on data displayed in each widget, refer the corresponding topics.

- [Collateral Covenant Compliance](#)  
This topic provides systematic instructions about the Collateral Covenant Compliance widget in Collateral 360 screen.
- [Overall Collateral](#)  
This topic provides systematic instructions about the Overall Collateral widget in Collateral 360 screen.
- [Collateral Valuation List](#)  
This topic provides systematic Instructions about the Collateral Valuation List widget in Collateral 360 screen.
- [Transactions](#)  
This topic provides systematic instructions about the Transactions widget in Collateral 360 screen.
- [Facility Summary](#)  
This topic provides systematic instructions about the Facility Summary widget in Collateral 360 screen.

## 2.1.1 Collateral Covenant Compliance

This topic provides systematic instructions about the Collateral Covenant Compliance widget in Collateral 360 screen.

**Figure 2-2 Collateral Covenant Compliance**

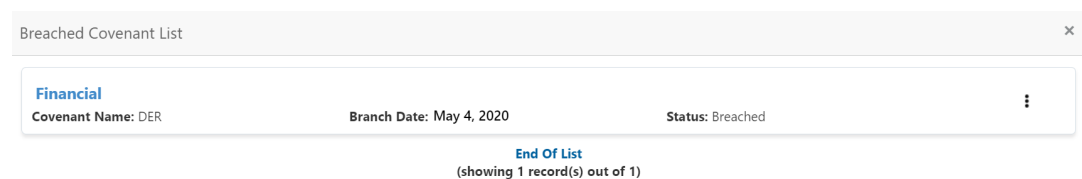


This widget provides an insight about the collateral's covenant compliance status by displaying the percentage of breached, complied, and due covenants.

1. Click on the required section in the pie chart to view detailed information.

The **Covenant List** of selected category is displayed as shown below.

**Figure 2-3 Covenant List**



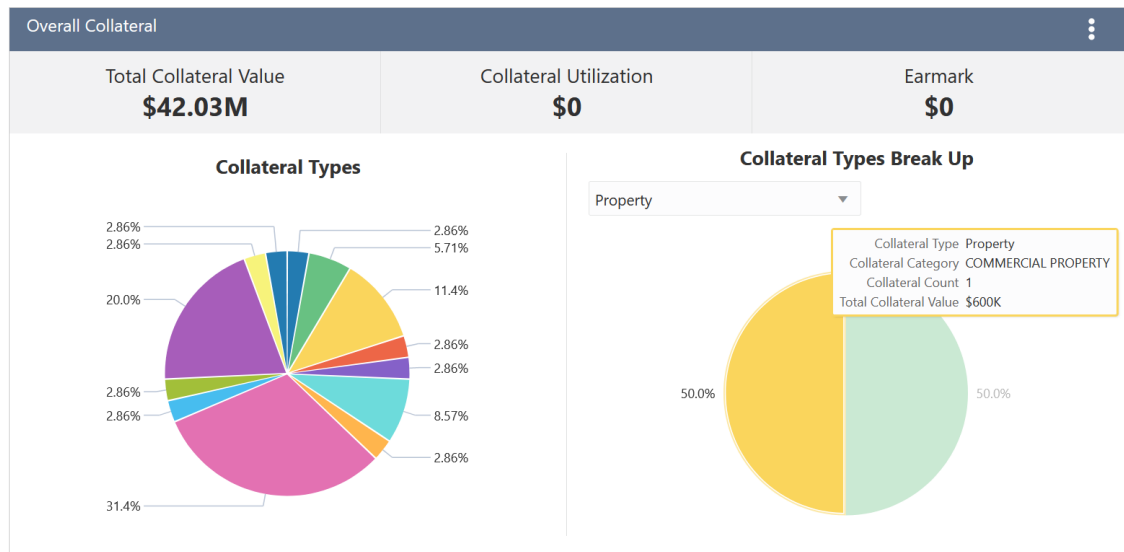
Close

2. Click the action icon in the covenant record to perform necessary actions.
3. click **Close**, to exit the **Covenant List** screen, .

## 2.1.2 Overall Collateral

This topic provides systematic instructions about the Overall Collateral widget in Collateral 360 screen.

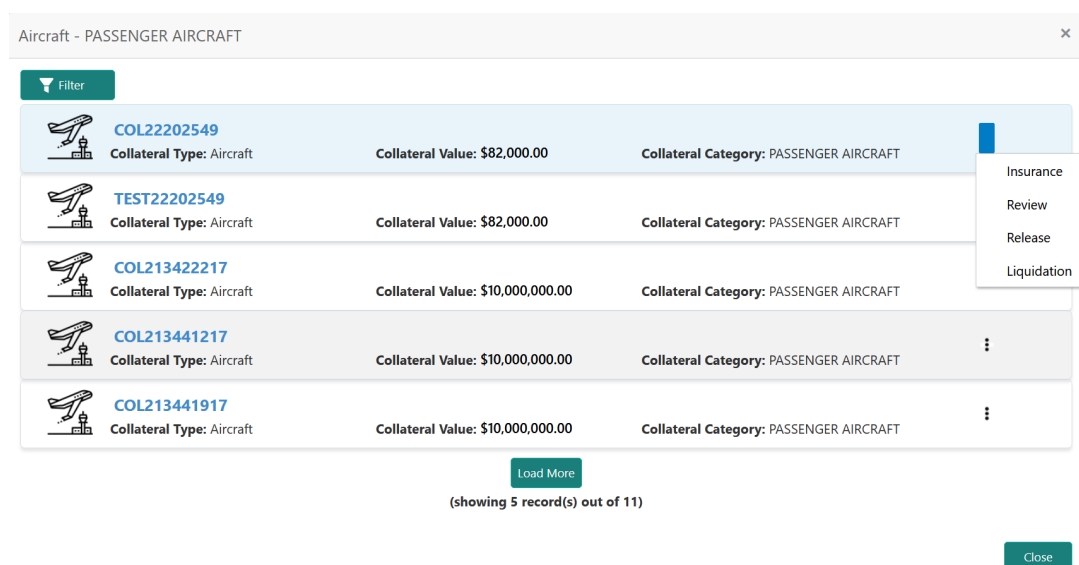
**Figure 2-4 Overall Collateral**



This widget displays the customer's overall collateral value, collateral utilization, and earmark amount along with the details of contribution from different collateral types.

1. To view the collaterals list by its type, click on the required section in the pie chart. The Collateral List is displayed based on selected collateral type.

**Figure 2-5 Collateral List**



2. To view the **Collateral Summary**, click the Collateral ID in the **Collateral List** screen.
3. To initiate **Insurance, Review, Release**, and / or **Liquidation** process for the collateral, click the action icon and select the required option.
4. To exit the **Collateral List** screen, click **Close**.
5. To view the break up of collateral types, select the required collateral type from the **Collateral Types Break Up** drop down list.

Contribution from each collateral category is displayed.

#### **Note**

You can click the required section in the break up pie chart to view the list of collaterals in selected category and initiate necessary process.

## 2.1.3 Collateral Valuation List

This topic provides systematic Instructions about the Collateral Valuation List widget in Collateral 360 screen.

**Figure 2-6 Collateral Valuation List**

Collateral Valuation List		
<b>COL22102195</b> Collateral Type: Property Agency name: Valuation frequency:	Collateral Value: \$100,000.00 Bank Haircut: 0	Valuation Date: Collateral Utilization: 0
<b>COL22102199</b> Collateral Type: Insurance Agency name: Valuation frequency:	Collateral Value: \$8,100.00 Bank Haircut: 0	Valuation Date: Collateral Utilization: 0
<b>COL22102201</b> Collateral Type: Bond Agency name: Valuation frequency:	Collateral Value: \$9,900.00 Bank Haircut: 0	Valuation Date: Collateral Utilization: 0

Page 1 of 18 (1-3 of 54 items) < 1 2 3 4 5 ... 18 >

If the collateral is valued by external agencies, the valuation details from all the agencies are listed in this widget.

1. Click on the **Collateral ID** to view the **Collateral Summary**.

Figure 2-7 Collateral Summary

Collateral Summary ✕

Customer ID  
CUST2000
Application ID
Current Status
Documents  
0
Collateral Type  
Vehicle
Collateral Category  
PASSENGER VEHICLE
Ownership Type  
Single

**Basic Information**

COL22212589  
VEHICLE1

Collateral Currency USD	Agreed Collateral Value \$27,000.00	Held Collateral Value	Available From Apr 13, 2018	Available Till	Applicable Business Trade
Exposure Type -	Charge Type Pledge	Purpose Of Collateral New Facility	Shareable Across Customers No		

**Vehicle**

1

Collateral

---

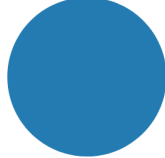
\$33K

Collateral Value

**Linked Facilities Details**

No data to display

**Ownership**



100%

**Seniority of charge**

1

Position

---

0	100
Total Percentage	Percentage Available

**Covenants**

0

Covenants proposed  
Standard Covenants Applicable

---

0	0
Complied Covenants	Breached Covenants

**Insurance**

0

Active Insurance

---

USD 0.00

Total Insurance Amount

**Configured Stage Status**

Risk Evaluation <span style="background-color: #2c3e50; color: white; padding: 2px 5px;">Not applicable</span>	External Legal Opinion <span style="background-color: #2c3e50; color: white; padding: 2px 5px;">Not applicable</span>	External Valuation <span style="background-color: #2c3e50; color: white; padding: 2px 5px;">Not applicable</span>
External Check <span style="background-color: #2c3e50; color: white; padding: 2px 5px;">Not applicable</span>	Field Investigation <span style="background-color: #2c3e50; color: white; padding: 2px 5px;">Not applicable</span>	

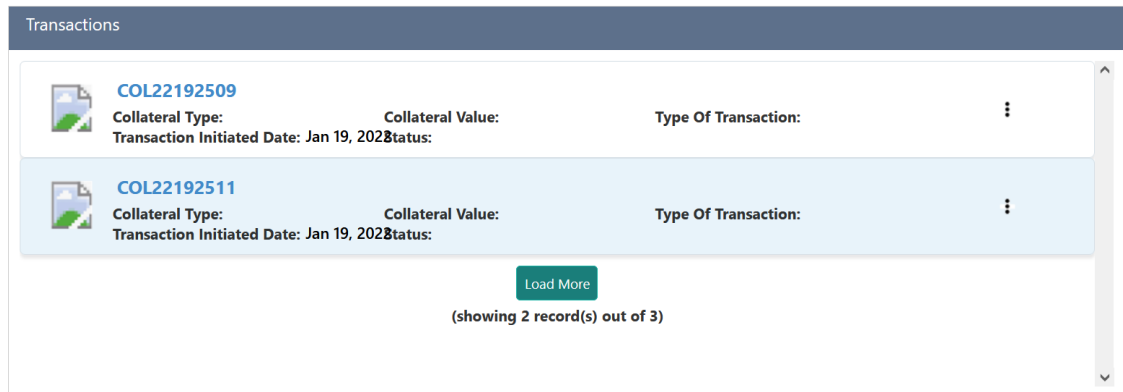
Close

2. Click **Close**, to exit the **Collateral Summary** screen, .

## 2.1.4 Transactions

This topic provides systematic instructions about the Transactions widget in Collateral 360 screen.

**Figure 2-8 Transactions**



This widget displays the list of transactions done on the collateral with its type and date. The Collateral Value as on transaction date is also displayed for quick reference.

1. Click the action icon in the transaction record to perform necessary actions.
2. Click on the **Collateral ID** to view the **Collateral Summary**.

The **Collateral Summary** screen is displayed.

Figure 2-9 Collateral Summary

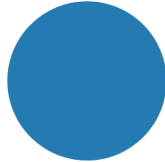
Collateral Summary ✕

Customer ID CUST2000	Application ID	Current Status	Documents 0	Collateral Type Vehicle	Collateral Category PASSENGER VEHICLE	Ownership Type Single
-------------------------	----------------	----------------	----------------	----------------------------	--	--------------------------

**Basic Information**

COL22212589  
VEHICLE1

Collateral Currency USD	Agreed Collateral Value \$27,000.00	Held Collateral Value	Available From Apr 13, 2018	Available Till	Applicable Business Trade
Exposure Type -	Charge Type Pledge	Purpose Of Collateral New Facility	Shareable Across Customers No		

Vehicle	Linked Facilities Details	Ownership
<p><b>1</b> Collateral</p> <hr/> <p><b>\$33K</b> Collateral Value</p>	<p>No data to display</p>	 <p>100%</p>
Seniority of charge	Covenants	Insurance
<p><b>1</b> Position</p>	<p><b>0</b> Covenants proposed Standard Covenants Applicable</p>	<p><b>0</b> Active Insurance</p>
<p><b>0</b>      <b>100</b></p> <p>Total Percentage      Percentage Available</p>	<p><b>0</b>      <b>0</b></p> <p>Complied Covenants      Breached Covenants</p>	<p><b>USD 0.00</b> Total Insurance Amount</p>

**Configured Stage Status**

Risk Evaluation <span style="background-color: #4a7c59; color: white; padding: 2px 10px; border-radius: 5px;">Not applicable</span>	External Legal Opinion <span style="background-color: #4a7c59; color: white; padding: 2px 10px; border-radius: 5px;">Not applicable</span>	External Valuation <span style="background-color: #4a7c59; color: white; padding: 2px 10px; border-radius: 5px;">Not applicable</span>
External Check <span style="background-color: #4a7c59; color: white; padding: 2px 10px; border-radius: 5px;">Not applicable</span>	Field Investigation <span style="background-color: #4a7c59; color: white; padding: 2px 10px; border-radius: 5px;">Not applicable</span>	

Close

3. Click **Close** to exit the **Collateral Summary** screen.

## 2.1.5 Facility Summary

This topic provides systematic instructions about the Facility Summary widget in Collateral 360 screen.

**Figure 2-10 Facility Summary**



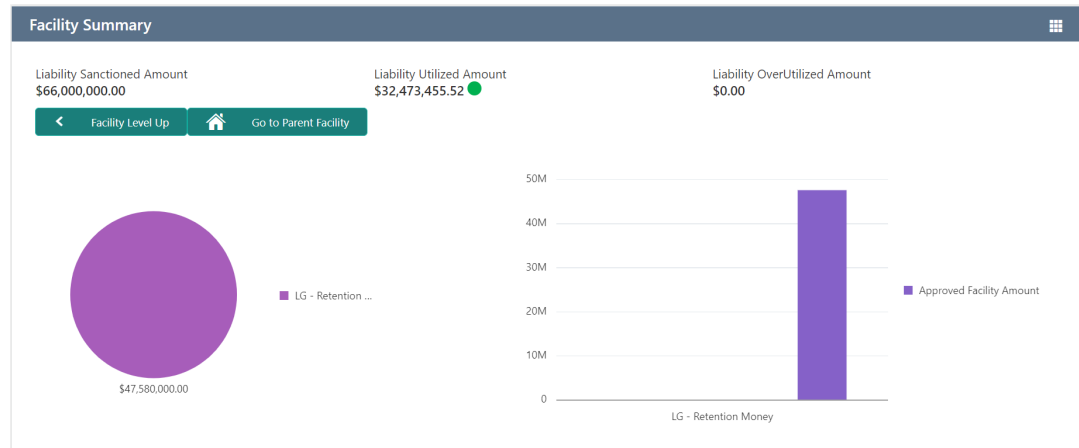
This widget displays the liability amount sanctioned, utilized, and overutilized against the collaterals in all the categories maintained in the system, such as Guarantee, Term Loan, Working Capital, and Letter of Credit.

### **Note**

All the amounts displayed in the pie chart are in collateral currency.

1. To view more information about the specific facility category, click on the required category in the pie chart.

The data for the selected category are displayed.

**Figure 2-11 Facility Category Details**

2. To view further information about the displayed categories, click on the required category in the pie chart.
3. To view the previous category information, click **Facility Level Up**.
4. To view the parent facility, click **Go to Parent Facility**.

# 3

## Collateral 360 - RM View

### 3.1 Collateral 360 - RM View

This topic describes about the Collateral 360 in RM View.

In Collateral 360 - RM View, collateral related information that requires RM's attention are displayed in addition to the general view. The RM can view the details and plan the collateral activities for the customers in an efficient manner. The following additional widgets are available in the RM view.

- Overall Facility Limit
- Upcoming Events
- Bank Deal Enablers
- Guidelines

Upon clicking **RM View** in the **Collateral 360** screen, the 360 degree interface is displayed as shown below.

Figure 3-1 Collateral 360 - RM View

Menu Item Search...

- Collaterals >
- Core Maintenance >
- Credit Facilities >
- Dashboard >
- Party Services >
- Policy >
- Rule >
- Security Management >
- Simplified Amend >
- Substitution >
- Core Maintenance >
- Credit Facilities >
- Dashboard >
- Party Services >
- Policy >
- Rule >
- Security Management >
- Task Management >
- Tasks >
- Awaiting Customer Clarification
- Business Process Maintenance
- Completed Tasks
- Free Tasks
- Hold Tasks
- My Tasks
- Search
- Supervisor Tasks
- Transaction Facilitors >

Select Customer ID

Overall Facility Limits		Transactions
<b>£72.46K</b> Sanctioned Limit	<b>£72.46K</b> Available Limit	<b>3</b> Work In Progress
<b>£72.46K</b> Utilized Limit	<b>£0</b> Earmark Limit	<b>0</b> Recent Completed Transactions

Overall Collateral

Total Collateral Value	Collateral Utilization	Earmark
<b>£41.61M</b>	<b>£0</b>	<b>£0</b>

**Collateral Types**

**Collateral Types Break Up**

Aircraft

Upcoming events

< April 2018 >

WK	S	M	T	W	T	F	S
13	1	2	3	4	5	6	7
14	8	9	10	11	12	13	14
15	15	16	17	18	19	20	21
16	22	23	24	25	26	27	28
17	29	30					

13-April-2018

Collateral ID: COL22212589    Event Name: release    Customer Name:

Status: INITIATED

Page 1 of 1 (1 of 1 items)    < 1 >

Bank Deal Enablers

No Information Available

Guidelines

Guideline Type: Collateral Policy Guideline

Collateral Type: Guarantee

No items to display.

Collateral Covenant Compliance

- Breached
- Complied
- Due

- [Overall Facility Limits](#)  
This topic describes information about the Overall Facility Limits widget in Collateral 360 - RM View screen.

- [Transactions](#)  
This topic describes information about the Transactions widget in Collateral 360 - RM View screen.
- [Upcoming Events](#)  
This topic describes information about the Upcoming Events widget in Collateral 360 - RM View screen.
- [Bank Deal Enablers](#)  
This topic describes information about the Bank Deal Enablers widget in Collateral 360 - RM View screen.
- [Guidelines](#)  
This topic provides information about the Guidelines widget in Collateral 360 - RM View screen.

### 3.1.1 Overall Facility Limits

This topic describes information about the Overall Facility Limits widget in Collateral 360 - RM View screen.

**Figure 3-2 Overall Facility Limits**

Overall Facility Limits	
<b>£72.46K</b> Sanctioned Limit	<b>£72.46K</b> Available Limit
<b>£72.46K</b> Utilized Limit	<b>£0</b> Earmark Limit

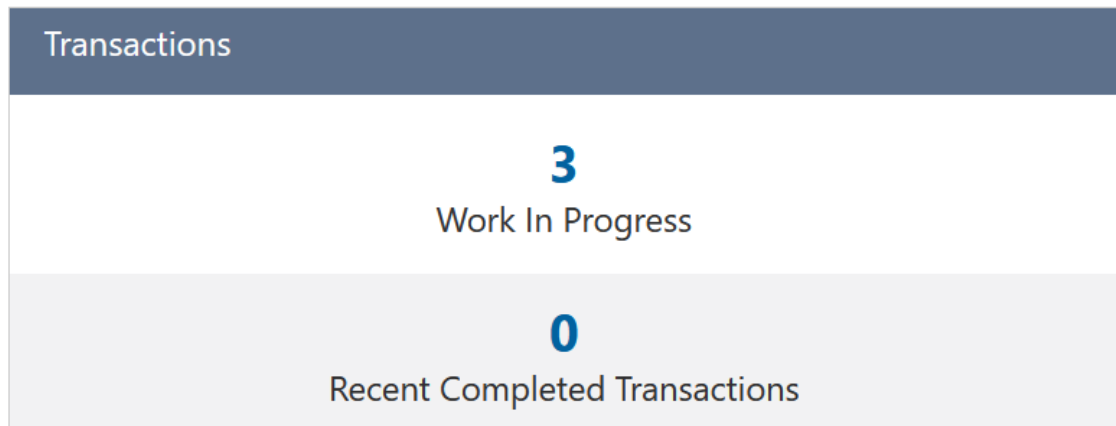
This widget displays the following limit details of facility linked to the customer collaterals in collateral currency.

- Sanctioned Limit
- Available Limit
- Utilized Limit
- Earmark Limit

## 3.1.2 Transactions

This topic describes information about the Transactions widget in Collateral 360 - RM View screen.

**Figure 3-3 Transactions - RM View**



This widget displays the number of transactions that are currently in progress and completed recently.

1. Click the count to view the transaction details.  
Transaction list is displayed as shown below.

**Figure 3-4 Transaction List**

Transaction ID	Collateral Type	Transaction Initiated Date	Collateral Value	Status	Type Of Transaction	Action
COL22192509		Jan 19, 2022				⋮
COL22192511		Jan 19, 2022				⋮
COL22312847		Jan 31, 2022				⋮
COL22312889		Jan 31, 2022				⋮

(showing 4 record(s) out of 15)

2. Click the action icon in the transaction record and perform necessary action.
3. To exit the **Transaction List** screen, click **Close**.

### 3.1.3 Upcoming Events

This topic describes information about the Upcoming Events widget in Collateral 360 - RM View screen.

**Figure 3-5 Upcoming Events**

The screenshot displays the 'Upcoming events' widget. On the left is a calendar for April 2018 with the 13th highlighted. On the right, a summary box for '13-April-2018' shows 'Collateral ID: COL22212589', 'Status: INITIATED', 'Event Name: release', and 'Customer Name:'. Below the summary, it indicates 'Page 1 of 1 (1 of 1 items)' and includes navigation arrows.

This widget displays the upcoming collateral events such as Review and Release based on the event date specified during the collateral processes.

1. Click on the **Collateral ID** to view the **Collateral Summary**.

Figure 3-6 Collateral Summary

Collateral Summary ✕

Customer ID CUST2000	Application ID	Current Status	Documents 0	Collateral Type Vehicle	Collateral Category PASSENGER VEHICLE	Ownership Type Single
-------------------------	----------------	----------------	----------------	----------------------------	--	--------------------------

**Basic Information**

COL22212589  
VEHICLE1

Collateral Currency USD	Agreed Collateral Value \$27,000.00	Held Collateral Value	Available From Apr 13, 2018	Available Till	Applicable Business Trade
Exposure Type -	Charge Type Pledge	Purpose Of Collateral New Facility	Shareable Across Customers No		

Vehicle	Linked Facilities Details	Ownership
<p><b>1</b> Collateral</p> <hr/> <p><b>\$33K</b> Collateral Value</p>	<p>No data to display</p>	<p>■ 100%</p>

Seniority of charge	Covenants	Insurance				
<p><b>1</b> Position</p>	<p><b>0</b> Covenants proposed Standard Covenants Applicable</p>	<p><b>0</b> Active Insurance</p>				
<table style="width: 100%;"> <tr> <td style="width: 50%;"><b>0</b> Total Percentage</td> <td style="width: 50%;"><b>100</b> Percentage Available</td> </tr> </table>	<b>0</b> Total Percentage	<b>100</b> Percentage Available	<table style="width: 100%;"> <tr> <td style="width: 50%;"><b>0</b> Complied Covenants</td> <td style="width: 50%;"><b>0</b> Breached Covenants</td> </tr> </table>	<b>0</b> Complied Covenants	<b>0</b> Breached Covenants	<p><b>USD 0.00</b> Total Insurance Amount</p>
<b>0</b> Total Percentage	<b>100</b> Percentage Available					
<b>0</b> Complied Covenants	<b>0</b> Breached Covenants					

**Configured Stage Status**

<p>Risk Evaluation <span style="background-color: #2c3e50; color: white; padding: 2px 10px;">Not applicable</span></p>	<p>External Legal Opinion <span style="background-color: #2c3e50; color: white; padding: 2px 10px;">Not applicable</span></p>	<p>External Valuation <span style="background-color: #2c3e50; color: white; padding: 2px 10px;">Not applicable</span></p>
<p>External Check <span style="background-color: #2c3e50; color: white; padding: 2px 10px;">Not applicable</span></p>	<p>Field Investigation <span style="background-color: #2c3e50; color: white; padding: 2px 10px;">Not applicable</span></p>	

Close

2. To exit the **Collateral Summary** screen, click **Close**.

### 3.1.4 Bank Deal Enablers

This topic describes information about the Bank Deal Enablers widget in Collateral 360 - RM View screen.

Figure 3-7 Bank Deal Enablers

**Bank Deal Enablers**

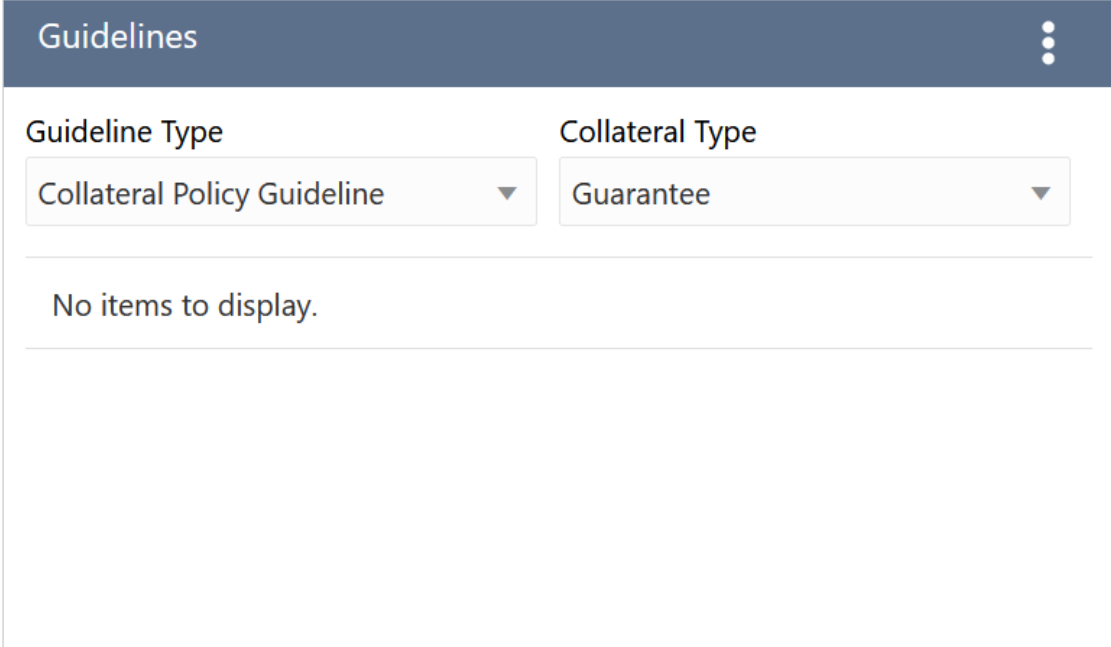
No Information Available

This widget displays the list of external agencies which valued the customer collaterals during different processes in Collateral Life-Cycle Management.

## 3.1.5 Guidelines

This topic provides information about the Guidelines widget in Collateral 360 - RM View screen.

**Figure 3-8 Guidelines**



The screenshot shows a widget titled "Guidelines" with a dark blue header. Below the header, there are two dropdown menus: "Guideline Type" and "Collateral Type". The "Guideline Type" dropdown is currently set to "Collateral Policy Guideline", and the "Collateral Type" dropdown is set to "Guarantee". Below these dropdowns, the text "No items to display." is visible, indicating that no guidelines are currently shown for the selected filters.

This widget allows you to view the following guidelines for all the supported collateral types. User can select the Guideline Type and Collateral Type to check policy adherence.

- Collateral Policy Guideline
- Product Policy Guideline
- Covenant Policy Guideline
- Terms and Conditions
- Secured Lending
- Unsecured Lending