

Oracle Banking Credit Facilities Process Management

Covenants and Conditions Tracking - Standalone User Guide



Release 14.8.1.0.0

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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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Oracle Banking Credit Facilities Proces Management Covenants and ConditionsTracking - Standalone User Guide, Release 14.8.1.0.0

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1.1 Purpose

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

1.2 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.

1.3 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle 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.

1.4 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.

1.5 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.

1.6 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*

1.7 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 Screenshot Disclaimer

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

1.9 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 |

1.10 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. |
| 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. |

1.11 Symbols and Icons

The following symbols and icons are used in the screens.

Table 1-3 Symbols and Icons - Common


| Symbol/Icon | Function |
|---|----------|
|  | Minimize |

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














| Symbol/Icon | Function |
|---|-----------------------------------|
|  | Maximize |
|  | 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. |

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





| Symbol/Icon | Function |
|---|--|
|  | Click this icon to delete an existing row. |
|  | 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 |

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

| Symbol/Icon | Function |
|---|---------------------|
|  | Unauthorized status |
|  | Closed status |
|  | Authorized status |

1.12 Prerequisite

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

2

Overview

This topic describe about the Linkage Covenants and Conditions.

Linking Covenants and Conditions

Covenants and Conditions can be linked to a customer, facility, and collateral. This is presently done through the Covenant Details and Condition Details screens under different data segments of various stages of the Credit Proposal (CP) processes or through the Standalone collateral processes.

- [Covenant Tracking](#)
This topic describes the systematic instructions for Covenant Tracking.
- [Terms and Conditions Tracking](#)
This topic describes the systematic instructions for Terms and Conditions Tracking.

2.1 Covenant Tracking

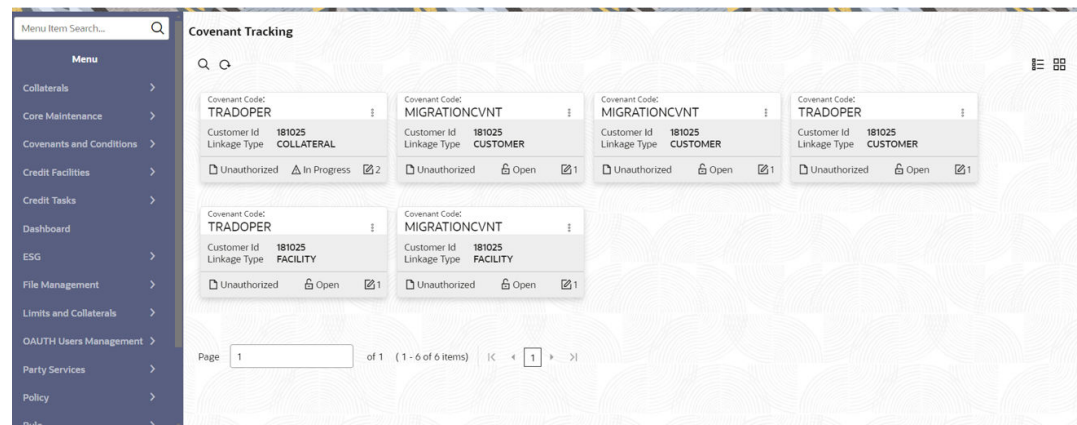
This topic describes the systematic instructions for Covenant Tracking.

The authorization status and record status of the Covenant tracking record is displayed as **Unauthorized** and **Open** initially. Once the checker authorizes the record, the authorization status is changed to **Authorized**.

1. On **Home** screen, click **Covenants and Conditions** under **Covenants and Conditions**, click on **Covenant Tracking**.

The **Covenant Tracking** screen displays.

Figure 2-1 Covenant Tracking



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

Table 2-1 Covenant Tracking - Field Description

| Field | Description |
|-----------------------------|--|
| Covenant Code | Displays the Covenant Codes . |
| Customer Id | Displays the Customer Id . |
| Linkage Type | Displays the entity type to which the covenant is linked. |
| Authorization Status | Displays the authorization status of the record. The options are: <ul style="list-style-type: none"> • Authorized • Unauthorized |
| Record Status | Displays the status of the record. The options are: <ul style="list-style-type: none"> • Open • Closed |
| Modification Number | Displays the number of modification performed on the record. |


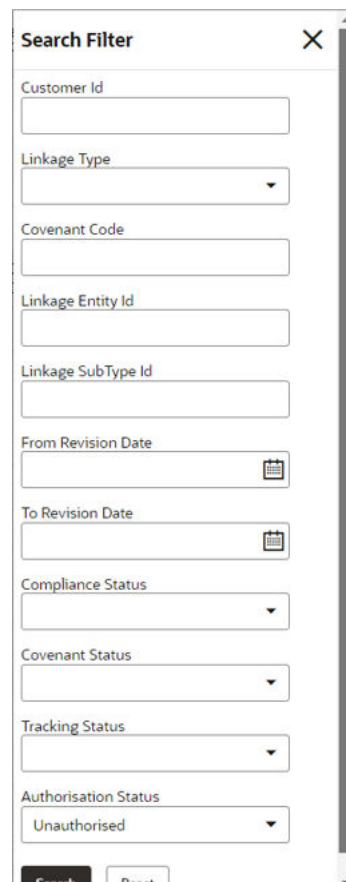
2. On **Covenant Tracking** screen, click  icon.
The Covenant Tracking - Search Filter screen displays.

Figure 2-2 Covenant Tracking - Search Filter



The screenshot shows a 'Search Filter' dialog box with the following fields and options:

- Customer Id: Text input field
- Linkage Type: Dropdown menu
- Covenant Code: Text input field
- Linkage Entity Id: Text input field
- Linkage SubType Id: Text input field
- From Revision Date: Date picker
- To Revision Date: Date picker
- Compliance Status: Dropdown menu
- Covenant Status: Dropdown menu
- Tracking Status: Dropdown menu
- Authorisation Status: Dropdown menu (currently set to 'Unauthorised')

At the bottom of the dialog, there are 'Search' and 'Reset' buttons.

3. On The **Covenant Tracking - Search** screen, specify the **Search Filter** to fetch the required covenant tracking.


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

Table 2-2 Covenant Tracking - Search – Field Description

| Field | Description |
|-----------------------------|---|
| Customer Id | Specify the Customer Id . |
| Linkage Type | Specify the Linkage Type . The allowed values are <ul style="list-style-type: none"> • Customer • Facility • Collateral This field will be populated based on the Linkage Entity ID. |
| Covenant Code | Specify the linked covenant code. |
| Linkage Entity Id | Specify the Linkage Entry Id to which the covenant is linked. Note: <ul style="list-style-type: none"> • For the linkage type Facility, the Facility ID must be specified in the Linkage Entity Id field. • For the linkage type Collateral, the Collateral ID is to be specified in the Linkage Entity Id field. |
| Linkage Sud Type Id | Specify the Linkage Sub Entity ID. Note: Applicable only for Collateral linkage. |
| From Revision Date | Specify the From Revision Date. |
| To Revision Date | Specify the To Revision Date. |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breached |
| Covenant Status | Specify the Covenant Status. The available options are: <ul style="list-style-type: none"> • Waive • Waive all |
| Tracking Status | Specify the Tracking Status. The available options are: <ul style="list-style-type: none"> • In Progress • Completed |
| Authorization Status | Specify the Authorization Status. The available options are: <ul style="list-style-type: none"> • Unauthorized • Authorized |

- Click **Search** to display the required Covenant Tracking.



- On Covenant Tracking screen, click  icon to Unlock, Delete, Authorize or View the Covenant Tracking.
- Click **Unlock** to modify the Covenant Tracking.

The **Covenant Tracking - Covenant linkage details** screen displays.

Figure 2-3 Covenant Tracking - Covenant linkage details

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

Table 2-3 Covenant Tracking - Covenant linkage details Field Description

| Fields | Description |
|----------------------------|---|
| Customer Id | Displays the customer Id |
| Customer Name | Displays the Customer Name. |
| Linkage Type | Displays the Linkage Type. The allowed values are <ul style="list-style-type: none"> • Customer • Facility • Collateral This field will be populated based on the Linkage Entity ID. |
| Covenant Linkage Id | Displays the Covenant Linkage Id. |
| Linkage Entity Id | Displays the Linkage Entry Id to which the covenant is linked. Note: <ul style="list-style-type: none"> • For the linkage type Facility, the facility line number must be specified in the Linkage Entity Id field. • For the linkage type Collateral, the Collateral ID is to be specified in the Linkage Entity Id field. |
| Linkage Sub Type | Displays the Linkage Sub Type, which signifies the Covenant's linkage to a child collateral. |
| Linkage Subtype Id | Displays the Linkage Sub Entity ID of the child collateral for a Collateral linkage type. |
| Result Value | Specify the Result value. |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breached |
| Compliance Date | Specify the Compliance Date. |

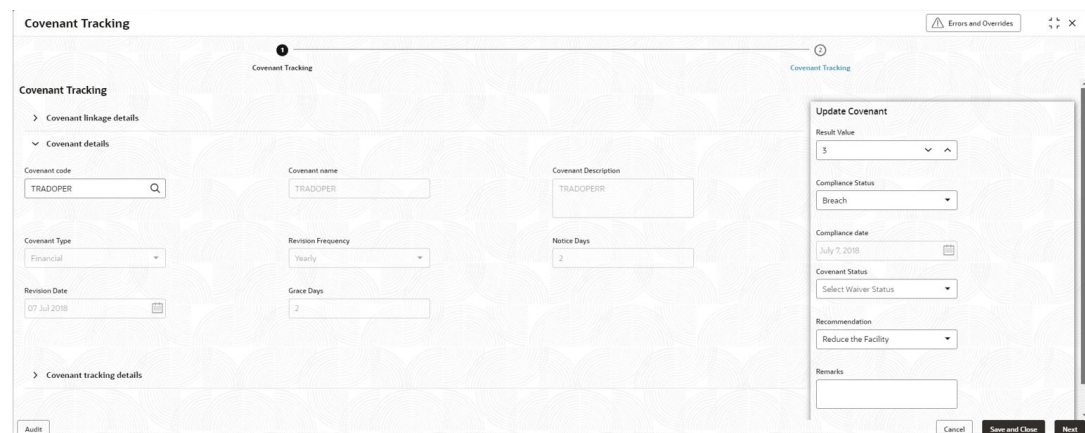
Table 2-3 (Cont.) Covenant Tracking - Covenant linkage details Field Description

| Fields | Description |
|------------------------|---|
| Covenant Status | Specify the Covenant Status. The available options are: <ul style="list-style-type: none"> • Waive • Waive all Note: <ul style="list-style-type: none"> • Once the covenant status of an instance is changed to Waive, the Next Revision Date will be updated to match that of the next instance. The updated covenant status and the new Next Revision Date will be displayed on the Covenant Linkage screen. • Once the covenant status is changed to Waive All at the instance level, the new covenant status and the covenant status change date will be displayed on the Covenant Linkage screen. |
| Recommendations | Specify the Recommendations. The available options are: <ul style="list-style-type: none"> • Reduce the Facility • Additional Collateral • Withdrawal of Facility • Others |
| Remarks | Specify the Remarks. Note: The user can only add Remarks when Others is selected from the Recommendations. |

7. Click **Next**.

The **Covenant Tracking - Covenant details** screen displays.

Figure 2-4 Covenant Tracking - Covenant details



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

Table 2-4 Covenant Tracking - Covenant details Fields and Description

| Fields | Description |
|----------------------|-----------------------------|
| Covenant code | Displays the Covenant code. |

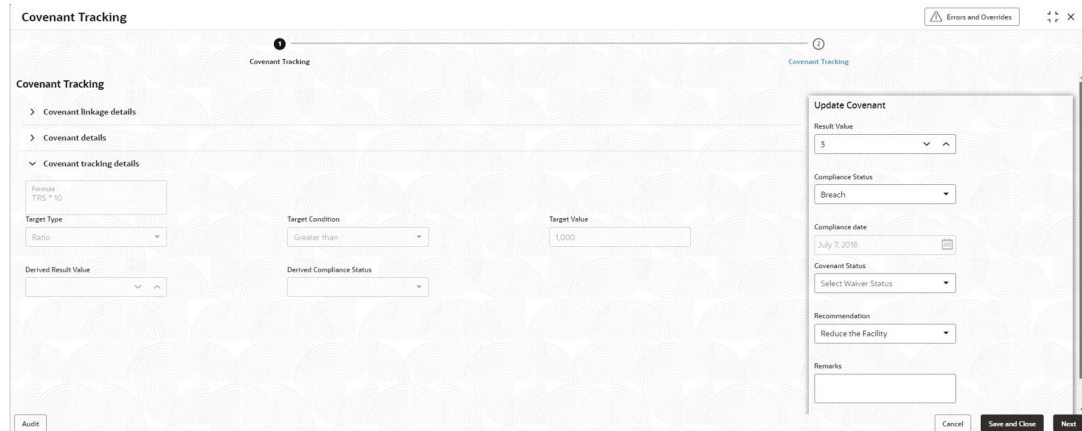
Table 2-4 (Cont.) Covenant Tracking - Covenant details Fields and Description

| Fields | Description |
|-----------------------------|---|
| Covenant name | Displays the Covenant name. |
| Covenant Description | Displays the Covenant Description. |
| Covenant Type | Displays the Covenant Type |
| Revision Frequency | Displays the Revision frequency. |
| Notice Days | Displays the notice Days. |
| Revision Date | Displays the Revision Date. |
| Grace Days | Displays the Grace Days. |
| Result Value | Specify the Result Value. |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breached |
| Compliance date | Specify the Compliance Date. |
| Covenant Status | Specify the Covenant Status. The available options are: <ul style="list-style-type: none"> • Waive • Waive all Note: <ul style="list-style-type: none"> • Once the covenant status of an instance is changed to Waive, the Next Revision Date will be updated to match that of the next instance. The updated covenant status and the new Next Revision Date will be displayed on the Covenant Linkage screen. • Once the covenant status is changed to Waive All at the instance level, the new covenant status and the covenant status change date will be displayed on the Covenant Linkage screen. |
| Recommendation | Specify the Recommendations. The available options are: <ul style="list-style-type: none"> • Reduce the Facility • Additional Collateral • Withdrawal of Facility • Others |
| Remarks | Specify the Remarks. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>The user can only add Remarks when Others is selected from the Recommendations.</p> </div> |

8. Click **Next**.

The **Covenant Tracking - Covenant tracking details** screen displays.

Figure 2-5 Covenant Tracking - Covenant tracking details



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

Table 2-5 Covenant Tracking - Covenant tracking details Fields and Description

| Fields | Description |
|----------------------------------|---|
| Formula | Displays the Formula. |
| Target Type | Displays the Target Type. |
| Target Condition | Displays the Target Condition. |
| Target Value | Displays the Target Value. |
| Derived Result Value | Displays the Derived Result Value. |
| Derived Compliance Status | Displays the Derived Compliance Status. |
| Result Value | Specify the Result Value. |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breached |
| Compliance date | Specify the Compliance Date. |
| Covenant Status | Specify the Covenant Status. The available options are: <ul style="list-style-type: none"> • Waive • Waive all Note: <ul style="list-style-type: none"> • Once the covenant status of an instance is changed to Waive, the Next Revision Date will be updated to match that of the next instance. The updated covenant status and the new Next Revision Date will be displayed on the Covenant Linkage screen. • Once the covenant status is changed to Waive All at the instance level, the new covenant status and the covenant status change date will be displayed on the Covenant Linkage screen. |

Table 2-5 (Cont.) Covenant Tracking - Covenant tracking details Fields and Description

| Fields | Description |
|-----------------------|---|
| Recommendation | Specify the Recommendations. The available options are: <ul style="list-style-type: none"> • Reduce the Facility • Additional Collateral • Withdrawal of Facility • Others |
| Remarks | Specify the Remarks. Note: The user can only add Remarks when Others is selected from the Recommendations. |

9. Click **Save** to update the modified fields.

Note

- Once the user modify and saves the record, the status will be **Unauthorized**.
- The modified record is to be authorized by the Checker using the **Authorize** option.
- The modification can be cancelled using the **Delete** option by the Maker.

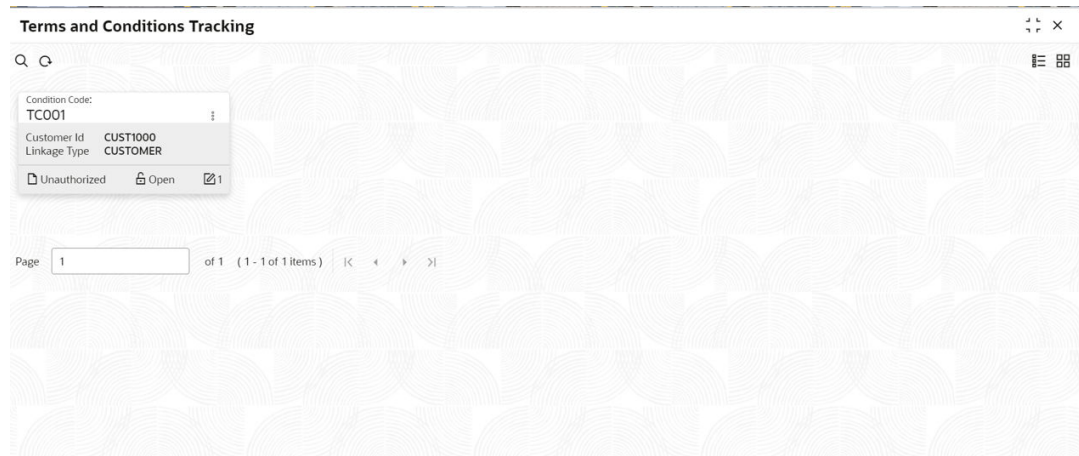
2.2 Terms and Conditions Tracking

This topic describes the systematic instructions for Terms and Conditions Tracking.

The authorization status and record status of the T&C tracking record is displayed as **Unauthorized** and **Open** initially. Once the checker authorizes the record, the authorization status is changed to **Authorized**.

1. On **Home** screen, click **Covenants and Conditions** under **Covenants and Conditions**, click on **Terms and Conditions Tracking**.

The **Terms and Conditions Tracking** screen displays.

Figure 2-6 Terms and Conditions Tracking

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

Table 2-6 Terms and Conditions Tracking - Field Description

| Field | Description |
|-----------------------------|--|
| Condition Code | Displays the Condition Codes . |
| Customer Id | Displays the Customer Id . |
| Linkage Type | Displays the entity type to which the Terms and Condition is linked. |
| Authorization Status | Displays the authorization status of the record. The options are: <ul style="list-style-type: none"> • Authorized • Unauthorized |
| Record Status | Displays the status of the record. The options are: <ul style="list-style-type: none"> • Open • Closed |
| Modification Number | Displays the number of modification performed on the record. |


- On Terms and Conditions Tracking screen, click  icon
The **Terms and Conditions - Search Filter** screen displays.

Figure 2-7 Terms and Conditions - Search Filter

3. On The **Terms and Conditions Tracking - Search Filter** screen, specify the **Search Filter** to fetch the required Terms and Conditions tracking.

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

Table 2-7 Terms and Conditions Tracking - Search Filter– Field Description


| Field | Description |
|---------------------------|--|
| Condition Code | Specify the Condition Code . |
| Linkage Type | Specify the Linkage Type. The allowed values are: <ul style="list-style-type: none"> • Customer • Facility • Collateral |
| Linkage Entity Id | Specify the Linkage Entry Id to which the Terms and Conditions is linked. <p>Note:</p> <ul style="list-style-type: none"> • For the linkage type Customer, the Linkage Entity ID will be defaulted from the Customer Id. • For the linkage type Facility, the facility line number must be specified in the Linkage Entity Id field. • For the linkage type Collateral, the Collateral ID is to be specified in the Linkage Entity Id field. |
| Linkage Subtype Id | Specify the Linkage Subtype ID. |
| Due Date from | Specify Due Date from. |
| Due Date To | Specify the Due Date To. |

Table 2-7 (Cont.) Terms and Conditions Tracking - Search Filter- Field Description

| Field | Description |
|-----------------------------|---|
| Tracking Status | Specify the Tracking Status. The available options are: <ul style="list-style-type: none"> • In Progress • Completed |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breach |
| Authorization Status | Specify the Authorization Status. The available options are: <ul style="list-style-type: none"> • Unauthorized • Authorized |
| T&C Status | Specify the T&C Status . The available option is Waive . |

4. Click **Search** to display to required Terms and Conditions Tracking.



5. On Terms and Conditions Tracking screen, click  icon to Unlock, Delete, Authorize or View the Terms and Conditions Tracking.

6. Click **Unlock** to modify the Terms and Conditions Tracking.

The **Terms and Conditions Tracking** screen displays.

Figure 2-8 Terms and Conditions Tracking

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

Table 2-8 Terms and Condition Tracking

| Fields | Description |
|--------------------------|---------------------------------|
| Customer No | Displays the Customer No. |
| Customer Name | Displays the Customer Name. |
| Linkage Entity Id | Displays the Linkage Entity Id. |
| Linkage Type | Displays the Linkage Type. |

Table 2-8 (Cont.) Terms and Condition Tracking

| Fields | Description |
|--------------------------------|---|
| Condition Code | Displays the Condition Code. |
| Condition Type | Displays the Condition Type. |
| Condition Description | Displays the Condition Description. |
| Due Date | Displays the Due Date. |
| Compliance Status | Specify the Compliance Status. The available options are: <ul style="list-style-type: none"> • Met • Breached |
| Compliance Date | Specify the Compliance Date. |
| Remarks | Specify the Remarks. |
| Waiver Status | Capture the Waiver Status. Note: <ul style="list-style-type: none"> • On selecting Compliance Status as Met - The Waiver Status will be Disabled. • On selecting Compliance Status as Breached - The Waiver Status will be enabled. User can capture the Waiver Status. |
| Recommendations | Select the Recommendations. The available options are: <ul style="list-style-type: none"> • Reduce the Facility • Additional Collateral • Withdrawal of Facility • Others Note: The system shows the Recommendations field only when the user selects Compliance Status as Breached . |
| Recommendations Remarks | User can add the Recommendations Remarks. Note: The System shows the Recommendation Remarks field only when the user select Recommendations as Others . |

7. Click **Save** to update the modified fields.

Note

Below points also to be included: The modified record is to be authorized by the Checker using the "Authorize" option.

- Once the user modify and saves the record, the status will be **Unauthorized**.
- The modified record is to be authorized by the Checker using the **Authorize** option.
- The modification can be cancelled by the Maker. using the **Delete** option.

Glossary

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