Oracle® Banking Operational Ledger Cloud Service Getting Started User Guide





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Preface

This topic contains the following sub-topics:

- Purpose
- Module Prerequisite
- Audience
- Basic Actions
- Conventions
- Diversity and Inclusion
- Documentation Accessibility
- Related Resources
- Screenshot Disclaimer
- Symbols and Icons
- Module Post-Requisites

Purpose

This guide helps to get started with Oracle Banking Operational Ledger Cloud Service. It 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 read in conjunction with Common Core, Security Management System, and other application user guides.

Module Prerequisite

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

Audience

This manual is intended for the following User/User Roles

Table 1 Audience

Role	Function
Back office clerk	Input functions for contracts
Back office managers/officers	Authorization functions
Product Managers	Product definition and authorization
End of day operators	Processing during end of day or beginning of day
Financial Controller/Product Managers	Generation of reports



Basic Actions

Table 2 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 .
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.)
ок	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 .

Conventions

The following text conventions are used in this document:

Table 3 Conventions

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.



Table 3 (Cont.) Conventions

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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.

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.

Related Resources

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

- Oracle Banking Microservices Platform Foundation User Guide
- Oracle Banking Common Core User Guide
- Routing Hub Configuration User Guide
- Oracle Banking Security Management System User Guide
- Oracle Banking Operational Ledger 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.

Symbols and Icons

The following symbols and icons are used in the screens.



Table 4 Symbols and Icons - Common

Symbol/Icon	Function
J L	Minimize
7 -	IVIII III III II ZG
гэ	Maximize
×	Close
Q	Perform Search
•	Open a list
1	Add a new record
K	Navigate to the first record
X	Navigate to the last record
4	Navigate to the previous record
>	Navigate to the next record
==	Grid view
	List view
G	Refresh
i	Calender
<u>_</u>	Copy a record
Ð	Click to view the created record.
•	Click to unlock, delete, authorize or view the created record.
	Toggle ON
	Toggle OFF



Table 5 Symbols and Icons - Audit Details

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

Table 6 Symbols and Icons - Widget

Symbol/Icon	Function
G	Open status
	Unauthorized status
6	Closed status
D	Authorized status

Module Post-Requisites

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

Application Access

This topic describes about the application access.

The user can access any application using the link provided by the administrator. Please 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 sub-topics:

Sign In

This topic describes the systematic instruction to sign in to the application.

Sign Out

This topic describes the systematic instruction to sign out from the application.

1.1 Sign In

This topic describes the systematic instruction to sign in to the application.

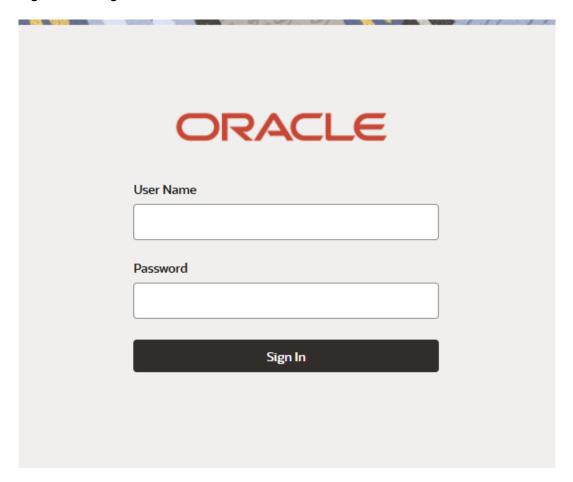
Make sure that the valid user name and password are created for the user.

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 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.

Figure 1-2 Homepage



1.2 Sign Out

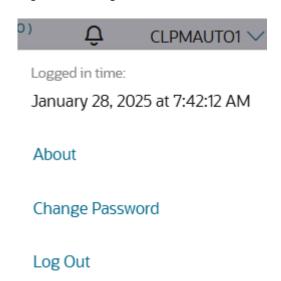
This topic describes the systematic instruction to sign out from the application.

Make sure that all the fields are entered and saved.

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

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

Figure 1-3 Sign out



3. Click **Log out** to sign out from the application.

The application logs out.

Application Environment

This topic describes about application environment.

On successful login, the application environment screen displays depending on the user privileges.



Figure 2-1 Application Environment

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

Table 2-1 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 are screens associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards.
Bank Name	Displays the name of the bank.
Branch Code	Displays the branch associated with the bank. Click to select the branches associated with the logged in user.
Application Date	Displays the last performed application date of branch's EOD.
User Profile	Displays the user profile related options and actions are available.

This topic contains the following sub-topics:

• Maintenance Screen

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



Summary Screen

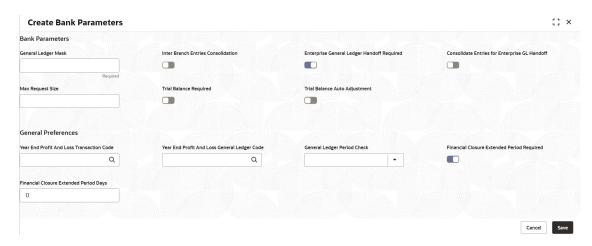
This topic describes about the various components on the summary screen.

2.1 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 2-2 Maintenance Screen



For more information, refer to the fields description table below.

Table 2-2 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.
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.

2.2 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 2-3 Summary Screen

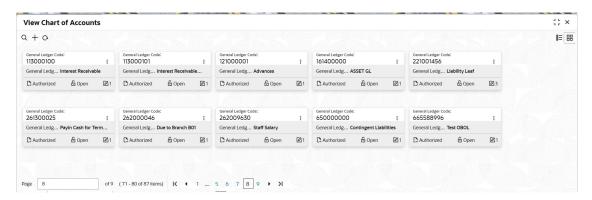


Table 2-3 Summary Screen - Field Description

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.

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 need 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 have access to the records and data.

Now, the user have 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 provides the systematic instructions to access the records.

View Records

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

Search the Records

This topic provides the systematic instructions to search the records.

Edit the Records

This topic provides the systematic instructions to edit the records.

• Create/Configure the Records

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

Copy the Records

This topic provides the systematic instructions to copy the record.

Unlock the Records

This topic provides the systematic instructions to unlock the record.

Reopen the Records

This topic provides the systematic instructions to reopen the record.

Delete the Records

This topic provides the systematic instructions to delete the record.

Print the Records

This topic provides the systematic instructions to print the record.

Authorize the Records

This topic provides the systematic instructions to authorize the record.

Minimize and Maximize the Records

This topic provides the systematic instructions to minimize and maximize the records.

Close the Records

This topic provides the systematic instructions to close the records.

Audit the Records

This topic provides the systematic instructions to audit the record.



3.1 Access the Records

This topic provides 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.

Click View <name of the screen>.

The View <name of the screen> screen displays. The user can view the configured records.

3.2 View 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 the user to find the required record faster.

The various formats to view the records are as follows:

<u>Tile View</u>

This topic describes about viewing the records in Tile View.

<u>List View</u>

This topic describes about viewing the records in list view.

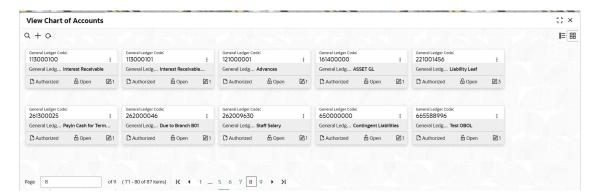
3.2.1 Tile View

This topic describes about viewing the records 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 3-1 Tile View



3.2.2 List View

This topic describes about viewing the records in list view.

On the maintenance screen, click List View icon to view the records that appear in a list view.

Figure 3-2 List View



3.3 Search the Records

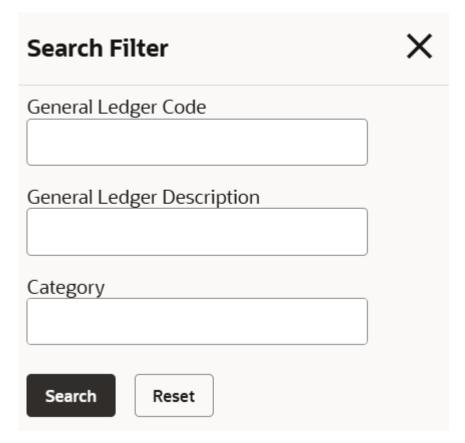
This topic provides the systematic instructions to search the records.

- 1. Navigate to View screen.
- 2. Click Search button.

The fields associated with the screen displays.



Figure 3-3 Search



- 3. Specify the required fields associated with the selected screen.
- 4. Click Search.

The requested record displays.

3.4 Edit the Records

This topic provides the systematic instructions to edit the records.

Make sure you have the privileges to know the guidelines to modify the records.

- 1. In a selected **View** screen, click a record to make the required changes.
- 2. Click Save to save the modified record.

3.5 Create/Configure the Records

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

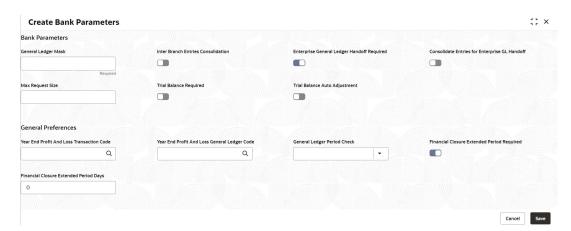
The user can create/configure records in any of the two ways:

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

The Create Bank Parameter Maintenance screen shown for reference.



Figure 3-4 Create Bank Parameter Maintenance



- 3. Specify the required details in the respective fields.
- 4. Click Save.

The Save - Confirmation Message pop-up screen displays.

Figure 3-5 Save - Confirmation Message



- Specify the remarks on the Remarks field.
- 6. Click Confirm to save the details.

The record is created and the maker remarks can be viewed in **Audit** screen. Refer to the <u>Audit the Records</u> topic for the detailed explanation.

7. Click Cancel to discard the changes.

3.6 Copy the Records

This topic provides the systematic instructions to copy the record.

- 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** to save the copied record.

3.7 Unlock the Records

This topic provides the systematic instructions to unlock the record.

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

The modified record is saved.

3.8 Reopen the Records

This topic provides the systematic instructions to reopen the record.

- Navigate to View screen.
- Click on the record that need to reopen.
- Click Reopen.

The **Confirmation** screen displays.

- 4. Specify a remark.
- 5. Click **Confirm** to reopen the record.

3.9 Delete the Records

This topic provides the systematic instructions to delete the record.

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

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

The selected record is deleted.

3.10 Print the Records

This topic provides the systematic instructions to print the record.

- 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.

3.11 Authorize the Records

This topic provides the systematic instructions to authorize the record.



- Navigate to Summary screen.
- 2. Click on the unauthorized record which needs to be actioned.
- 3. Click Authorize.

The authorized records associated with the screen displays.

Figure 3-6 Authorize



4. Click View to view the record.



If the **Enforce View before Authorize** toggle is enabled in **View Account Parameters** screen, the user must view the record before authorizing the record.

- Click Cancel to cancel the authorization of the record.
- 6. Select the required modification number that must be approved/rejected.

Note

- If the lower modification has to be rejected, all the higher modifications (if any) must also be rejected.
- If the higher modification has to be approved, all the lower modifications (if any) must also be approved.

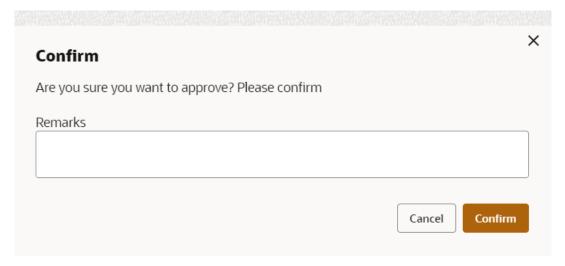
To authorize the record:

- Select the required record that must be authorized.
- 8. Click **Approve** to authorize the record.

The **Authorize - Confirmation Message** pop-up screen displays.



Figure 3-7 Authorize - Confirmation Message



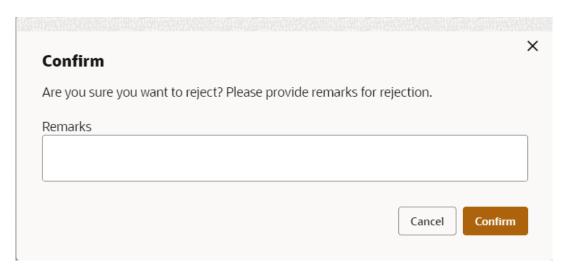
- 9. Specify the authorization remarks in the **Remarks** field.
- 10. Click Confirm to confirm the authorization of the record.
- 11. Click **Cancel** to discard the authorization of the record.

To reject the record:

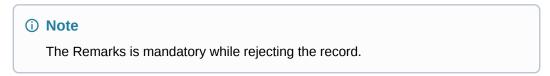
- 12. Select the required record that must be rejected.
- 13. Click **Reject** to reject the record.

The **Reject - Confirmation Message** pop-up screen displays.

Figure 3-8 Reject - Confirmation Message



14. Specify the rejection remarks in the **Remarks** field.



15. Click **Confirm** to reject the record.



The selected record is rejected and the rejection remarks can be viewed in **Audit** screen. Refer to <u>Audit the Records</u> topic for the detailed explanation.

16. Click Cancel to discard the rejection of the record.

3.12 Minimize and Maximize the Records

This topic provides the systematic instructions to minimize and maximize the records.

- 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.

3.13 Close the Records

This topic provides the systematic instructions to close the records.

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

The selected record is closed.



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

3.14 Audit the Records

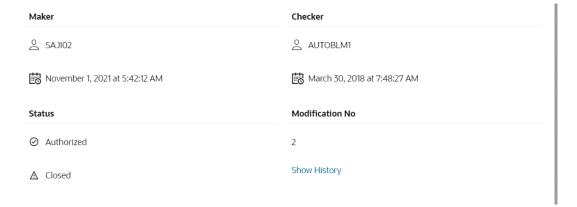
This topic provides the systematic instructions to audit the record.

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

The Audit detail popup screen displays.



Figure 3-9 Audit



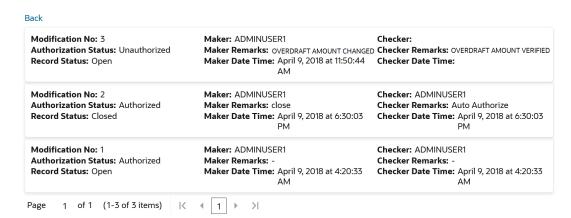
3. Click **Show History** hyperlink to view the modification history of the record.



This hyperlink appears only if the **Modification Number** is greater than 1.

The **Modification History** popup screen displays in the reverse chronological order.

Figure 3-10 Modification History



- 4. Click **Back** to navigate to the previous screen.
- 5. Click anywhere the screen to close the audit detail pop-up screen.

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 the mandatory and optional fields in the screen.

Remove Tile

This topic describes the systematic instructions to remove the dashboard tile.

Reorder Tile

This topic describes the systematic instructions to reorder the dashboard tile.

Expand Tile

This topic describes the systematic instructions to expand the dashboard tile.

Add Tile

This topic describes the systematic instructions to add the dashboard tile.

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 using the numbers options.

4.2 Mandatory and Optional Fields

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

The user can identify the mandatory field with the **Required** text. Once the value is captured, the **Required** text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom of the fields.

4.3 Remove Tile

This topic describes the systematic instructions to remove the dashboard tile.

Click Remove to remove the dashboard widget from the landing page.

The removed widgets are available under the **Add Tiles** option.

4.4 Reorder Tile

This topic describes the systematic instructions to reorder the dashboard tile.



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.

4.5 Expand Tile

This topic describes the systematic instructions to expand the dashboard tile.

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

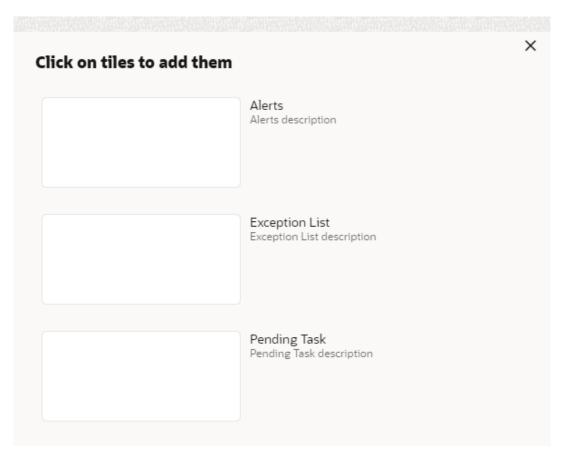
4.6 Add Tile

This topic describes the systematic instructions to add the dashboard tile.

 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 4-1 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.

Common Fields

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

The list of common fields are as follows.

Table 5-1 Common Fields

Field	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.
General Ledger Code	The user can select a configured general ledger code which the user wants to associate with the selected screen. The user can configure the general ledger code using the Chart of Accounts screen.
MIS Code	The user can select a configured MIS code which the user wants to associate with the selected screen. The user can configure the MIS code using the MIS Class screen.
Financial Cycle	The user can select a configured financial cycle which the user wants to associate with the selected screen. The user can configure the financial cycle using the Accounting Period screen.
Period Code	The user can select a configured period code which the user wants to associate with the selected screen. The user can configure the period code using the Accounting Period 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.
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.
Status	Displays the status of the record: • Authorized: The record is verified and authorized. • Unauthorized: The record is not verified. • Rejected: The record is rejected. • Open: The record is open and waiting for verification. • Closed: The record is closed.

Common Buttons/Icons

This topic provides the information about all the common buttons/icons used in the application.

The list of common buttons and icons are as follows.

Table 6-1 List of Buttons/Icons

Button/Icon	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.
Сору	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.
Reject	Rejects the configured record for the selected screen.
Collapse	Minimises 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 scree
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.
<	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.

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