

Oracle Banking Trade Finance Process Management

Getting Started User Guide



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Contents

1 Preface

1.1	Purpose	1
1.2	Audience	1
1.3	Documentation Accessibility	1
1.4	Critical Patches	2
1.5	Diversity and Inclusion	2
1.6	Structure	2
1.7	Conventions	2
1.8	Related Documents	2
1.9	Screenshot Disclaimer	2
1.10	Acronyms and Abbreviations	3
1.11	Symbols and Icons	3

2 Getting Started

2.1	Access Application	1
2.1.1	Sign In	1
2.1.2	Sign Out	2
2.2	Application Environment	3
2.2.1	Screen Environment	4
2.2.1.1	Dashboard	4
2.2.1.2	Maintenance Screen	8
2.2.1.3	Summary Screen	9
2.3	How to's	10
2.3.1	Access the Records	11
2.3.2	View the Records	11
2.3.2.1	Tile View	12
2.3.2.2	Tile View with Context Menu	12
2.3.2.3	List View	13
2.3.3	Search the Records	14
2.3.4	Refresh the Records	15
2.3.5	Create / Configure the Records	15
2.3.6	Edit the Records	16
2.3.7	Copy the Records	16

2.3.8	Unlock the Records	16
2.3.9	Reopen the Records	17
2.3.10	Delete the Records	17
2.3.11	Print the Records	17
2.3.12	Authorize the Records	17
2.3.13	Minimize and Maximize the Records	20
2.3.14	Close the Records	20
2.3.15	Audit the Records	20
2.4	Screen / Dashboard	21
2.4.1	Pagination	21
2.4.2	Mandatory and Optional Fields	21
2.4.3	Remove Tile	22
2.4.4	Reorder Tile	22
2.4.5	Expand Tile	22
2.4.6	Add Tile	22
2.5	Common Fields	23
2.6	Common Buttons	24

Index

Glossary

1

Preface

- [Purpose](#)
- [Audience](#)
This document is intended for the following audience:
- [Documentation Accessibility](#)
- [Critical Patches](#)
- [Diversity and Inclusion](#)
- [Structure](#)
This manual is organized into the following chapters:
- [Conventions](#)
- [Related Documents](#)
- [Screenshot Disclaimer](#)
- [Acronyms and Abbreviations](#)
- [Symbols and Icons](#)

1.1 Purpose

This manual is designed to help you quickly get acquainted with the getting started of Oracle Banking Trade Finance Process Management 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.

1.2 Audience

This document is intended for the following audience:

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

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 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](#).

1.5 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.

1.6 Structure

This manual is organized into the following chapters:

- Preface gives information on the intended audience, structure, and related documents for this User Manual.
- The subsequent chapters provide an overview to the module.

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.
<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 Related Documents

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.

1.9 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.

1.10 Acronyms and Abbreviations

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

Table 1-1 Acronyms and Abbreviations

Abbreviation	Description
OBTFPM	Oracle Banking Trade Finance Process Management
OBTFPMCS	Oracle Banking Trade Finance Process Management Cloud Service
LC	Letter of Credit
BC	Bankers Cheque
FX	Foreign Exchange
CCY	Currency
LCY	Local Currency
FCY	Foreign Currency
LOV	List of Values
CIF	Customer Information File
UDF	User Defined Fields
FFT	Free Format Text
SBLC	Standby Letter of Credit

1.11 Symbols and Icons

The list of symbols and icons available on the screens are as follows:

Table 1-2 Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Date Range
	Add a new record

Table 1-2 (Cont.) Symbols and Icons - Common

Symbol/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
	Click this icon to add a new row.
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts
	Unlock Option
	View Option
	Reopen Option

Table 1-3 Symbols and Icons - Widget

Symbol/Icon	Function
	Open status

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

Symbol/Icon	Function
	Unauthorized status
	Rejected status
	Closed status
	Authorized status
	Modification Number

2

Getting Started

Welcome to Getting Started user guides. This guide provides an overview on the Oracle Banking Trade Finance Process Management application and explains basic design of Oracle and the common operations that you can follow while using it.

This topic contains the following sub-topics:

- [Access Application](#)
- [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.
- [Screen / Dashboard](#)
This topic describes about Screen / Dashboard.
- [Common Fields](#)
This topic provides information about all the common fields used in the application.
- [Common Buttons](#)
This topic provides information about all the common buttons used in the application.

2.1 Access Application

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**.

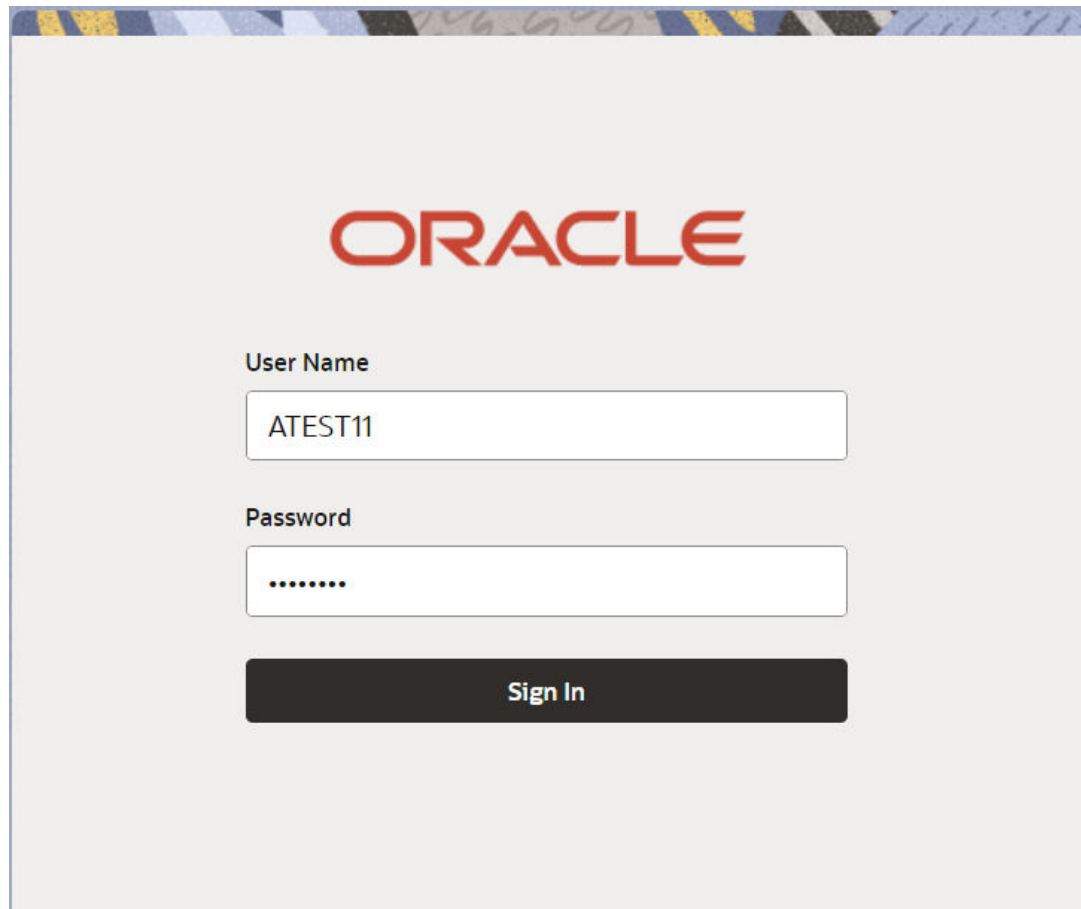
- [Sign In](#)
This topic provides systematic instructions to sign in to the application.
- [Sign Out](#)
This topic provides systematic instructions to log out from the application.

2.1.1 Sign In

This topic provides systematic instructions to sign in to the application.

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

1. Specify the URL in the browser address and press **Enter**.
The **Sign In** screen displays.

Figure 2-1 Sign InThe image shows the Oracle Sign In interface. At the top, the Oracle logo is displayed in red. Below the logo, there are two input fields: 'User Name' and 'Password'. The 'User Name' field contains the text 'ATEST11'. The 'Password' field is masked with seven dots. Below these fields is a dark grey button with the text 'Sign In' in white. The background of the sign-in area is light grey with a subtle pattern.

2. Specify the fields **User Name** and **Password**.

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

Table 2-1 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.

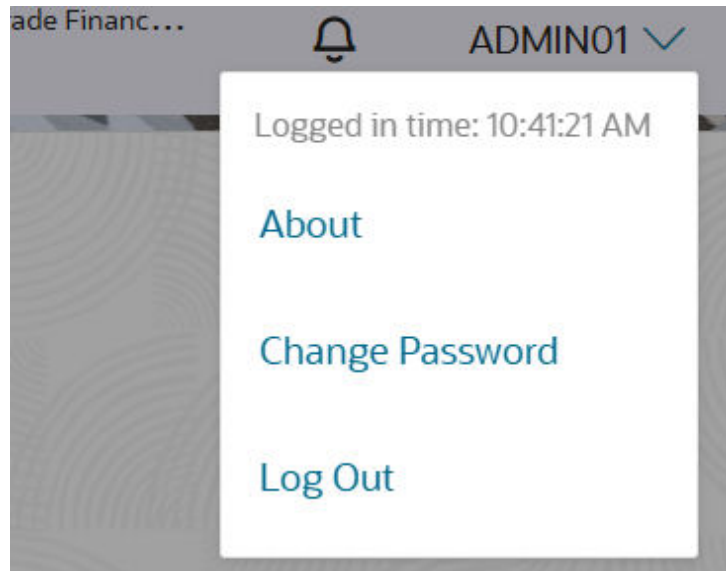
2.1.2 Sign Out

This topic provides systematic instructions to log 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.

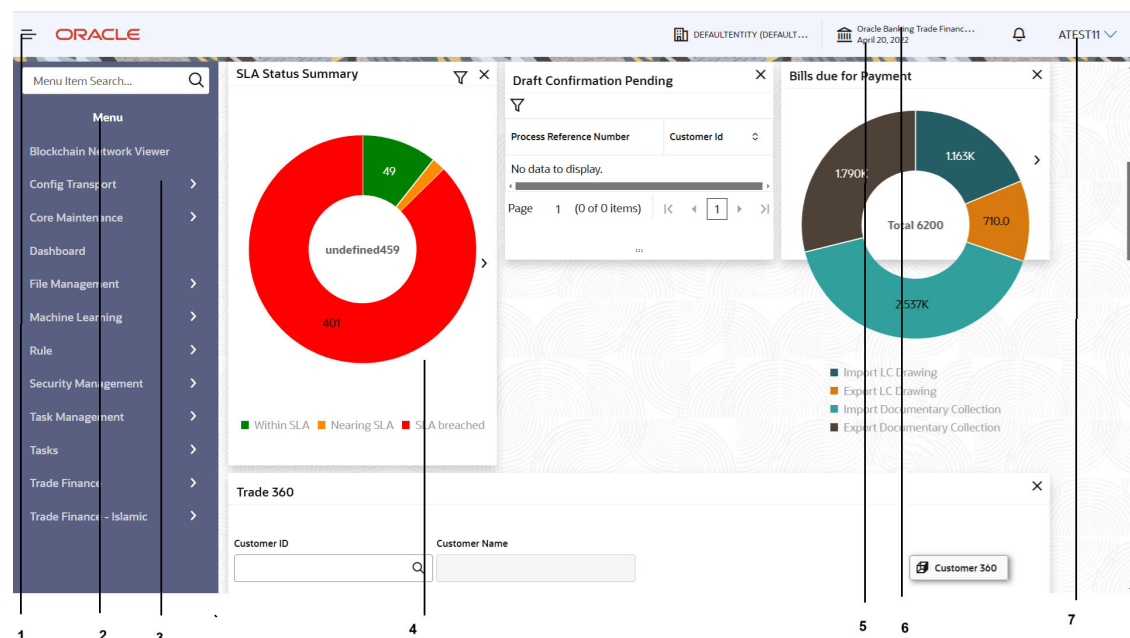
Figure 2-2 User Profile

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

2.2 Application Environment

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

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

Figure 2-3 Application Environment

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

Table 2-2 Application Environment – Field Description

Field	Description
1. Hamburger Menu	Click expand/collapse the menu.
2. Menu	Click to navigate/open the screens associated with the application.
3. Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
4. Display Grid	Displays the screens/dashboards.
5. Application Date	Displays the last performed application date of branch's EOD.
6. 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.
7. User Profile	Displays the user profile related options and actions.

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

2.2.1 Screen Environment

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

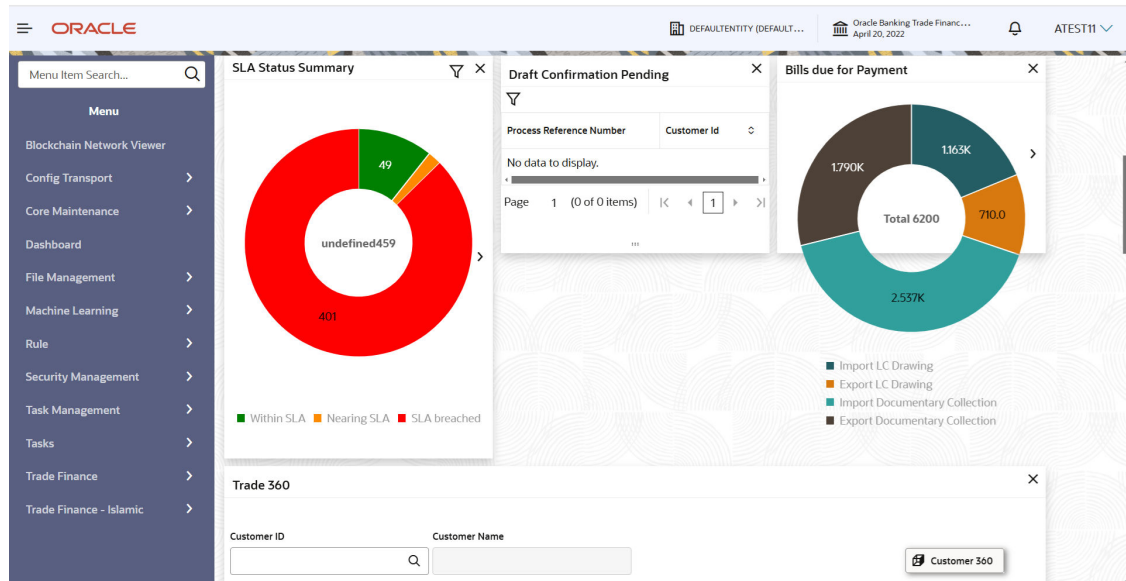
There are three types of screens in the application.

- Dashboard
- Maintenance Screen
- Summary Screen
- [Dashboard](#)
This topic describes about the dashboard.
- [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.

2.2.1.1 Dashboard

This topic describes about 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 2-4 Dashboard

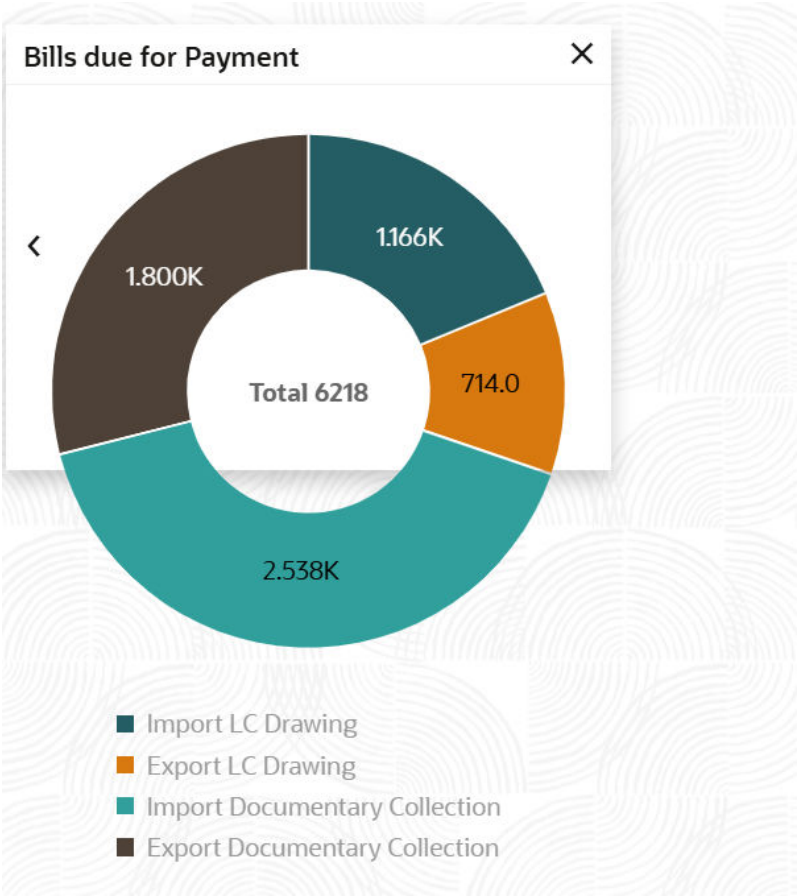
- [Dashboard Widget](#)

2.2.1.1.1 Dashboard Widget

This topic contains the following subtopics:

- [Exception Approval Widget](#)
- [RM Widget](#)
- [Bills Due for Payment Widget](#)
- [Exception Approval Widget](#)
- [RM Widget](#)
- [Bills Due for Payment Widget](#)

Authorized users will be able to view LC as well Collection bills due for liquidation using the Bills due for payment widget. Authorized users will also be able to initiate liquidation process from within the widget.



2.2.1.1.1.1 Exception Approval Widget

The user can view the Pending Exception Approval Tasks Widget in the Dashboard in the Exception Approval Widget, to know the Exception Tasks pending for approval and acquire them and work on them if he has the user rights.

The widget list view indicates the no. of items against each of the exception stages.

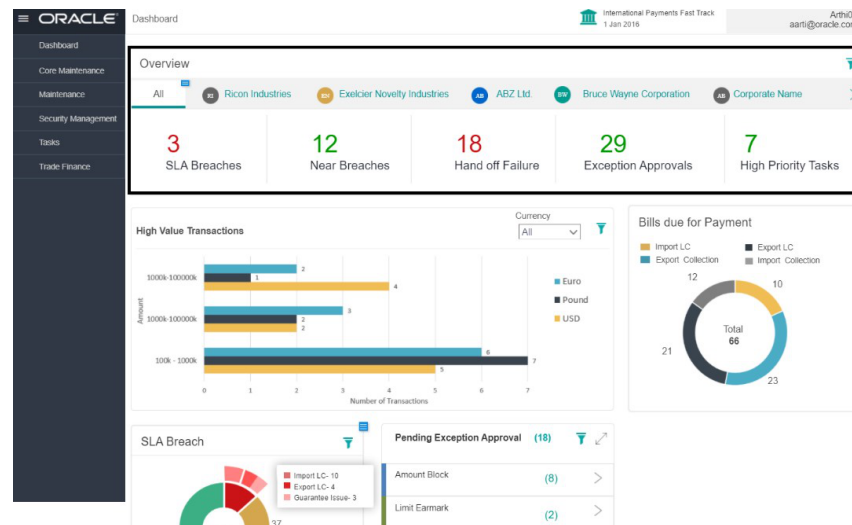
When the user clicks on one of the exception stages, the system should display all the items in the stage in a table view as per the filter applied.

Pending Exception Approval (6)			
Amount Block Exception (0)	Limit Earmark Exception (6)	KYC Checks Exception (0)	
Sanction Checks Exception (0)	AML Checks Exception (0)	Release Limit Earmark Exception (0)	
Release Amount Block Exception (0)	Deposit Link Exception (0)	Release Deposit Link Exception (0)	

2.2.1.1.1.2 RM Widget

RM widget is a separate panel and is available to Relationship Managers (RM) in banks, who takes care of a given number of customers and is the primary point of contact between the bank and the customer.

RM user can see the transactions of their customers in the dashboard.

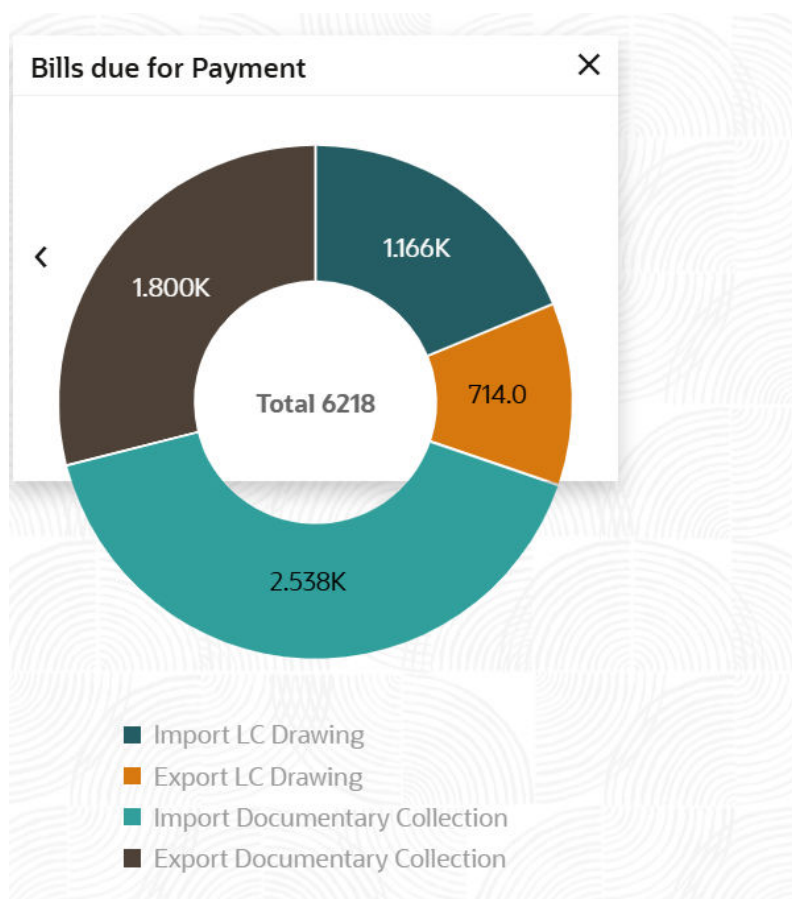


1. The widget can contain the overview of critical activities/tasks customers.
2. The widget can filter only the customers attached to me as an RM.
3. The widget can support view of All customers.
4. The widget can also support display of select customers that are configurable.
5. The widget can auto-refresh on a pre-decided schedule.
6. The widget should allow me to drilldown and work on the individual tasks as required.

The individual widget below RM widget displays details of all customers and the RM has to filter specific customers to find more information.

2.2.1.1.1.3 Bills Due for Payment Widget

Authorized users will be able to view LC as well Collection bills due for liquidation using the Bills due for payment widget. Authorized users will also be able to initiate liquidation process from within the widget.



2.2.1.2 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 2-5 Maintenance Screen

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

Table 2-3 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.

2.2.1.3 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 2-6 Summary Screen

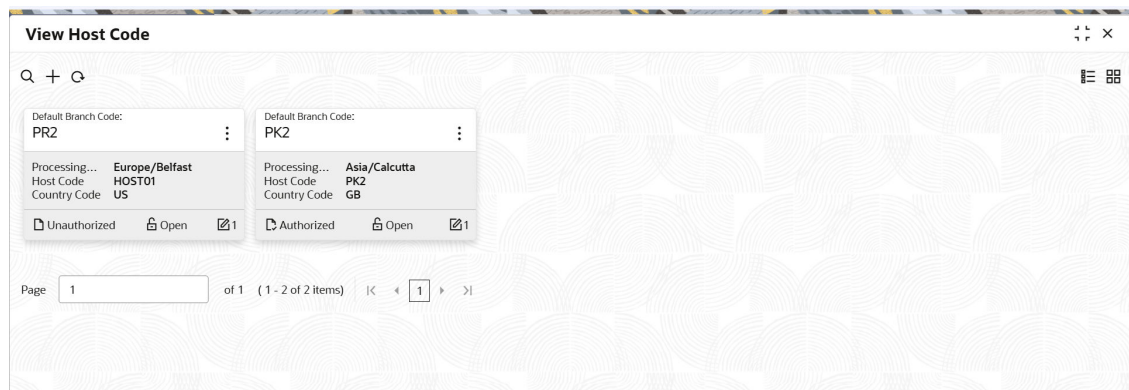


Table 2-4 Summary Screen – Field Description

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.

2.3 How to's

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

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, you have learned how to work with your records, you might want to explore more advanced features.

- [Access the Records](#)
This topic provides systematic instructions to access the records.
- [View the Records](#)
This topic describes about viewing the records.
- [Search the Records](#)
This topic provides systematic instructions to search the records.
- [Refresh the Records](#)
This topic provides systematic instructions to refresh the records.

- [Create / Configure the Records](#)
This topic provides systematic instructions to create / configure the records.
- [Edit the Records](#)
This topic provides systematic instructions to edit the record.
- [Copy the Records](#)
This topic provides systematic instructions to copy the record.
- [Unlock the Records](#)
This topic provides systematic instructions to unlock the record.
- [Reopen the Records](#)
This topic provides systematic instructions to reopen the record.
- [Delete the Records](#)
This topic provides systematic instructions to delete the record.
- [Print the Records](#)
This topic provides systematic instructions to print the record.
- [Authorize the Records](#)
This topic provides systematic instructions to authorize the record.
- [Minimize and Maximize the Records](#)
This topic provides systematic instructions to minimize and maximize the screen.
- [Close the Records](#)
This topic provides systematic instructions to close the record.
- [Audit the Records](#)
This topic provides systematic instructions to audit the record.

2.3.1 Access the Records

This topic provides 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, <name of the screen>.
The screens associated with the sub-menu appears.
3. Create <name of the screen>.
The screen appears. The user can create/configure the new records.
4. View <name of the screen>.
The screen appears. The user can view the configured records.

2.3.2 View the Records

This topic describes about viewing 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.

A few different formats to view the records are as follows:

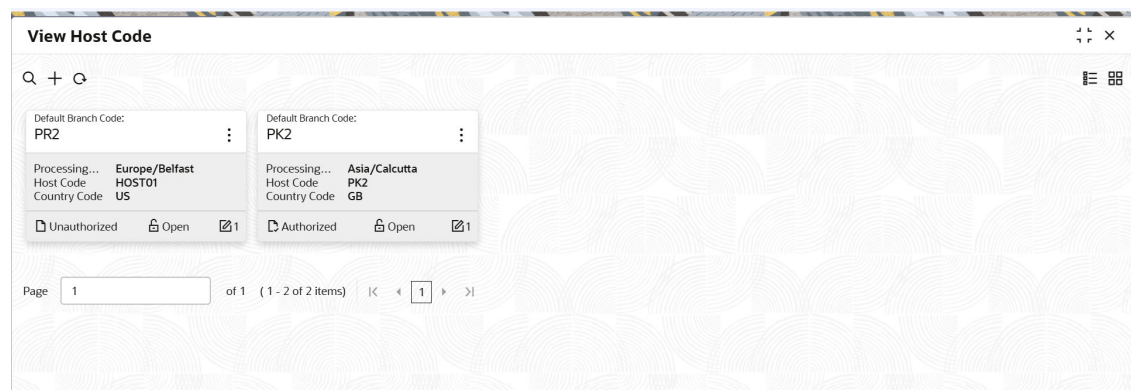
- [Tile View](#)
This topic describes about view the record in tile view.
- [Tile View with Context Menu](#)
This topic describes about view the record in tile view with context menu.
- [List View](#)
This topic provides systematic instructions to view the record in list view.

2.3.2.1 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 2-7 Tile View



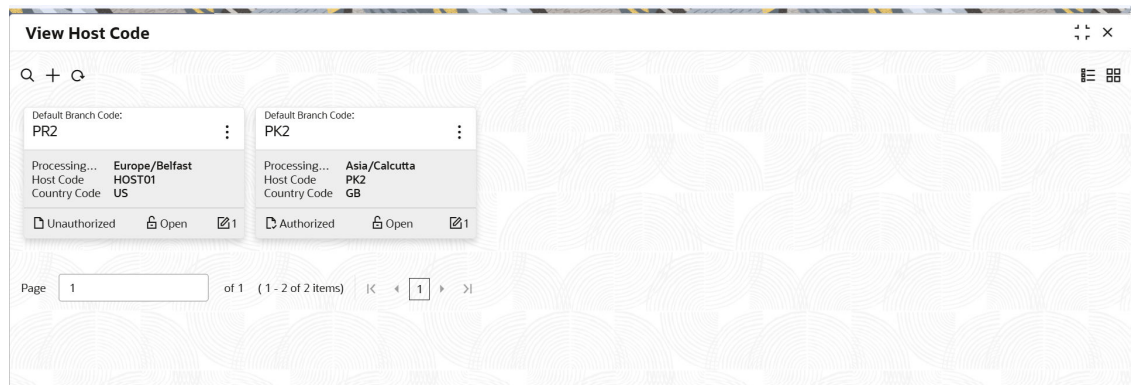
2.3.2.2 Tile View with Context Menu

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 2-8 Tile View with Context Menu

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

Table 2-5 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 appears. The list of actions depend on the status of the record.

2.3.2.3 List View

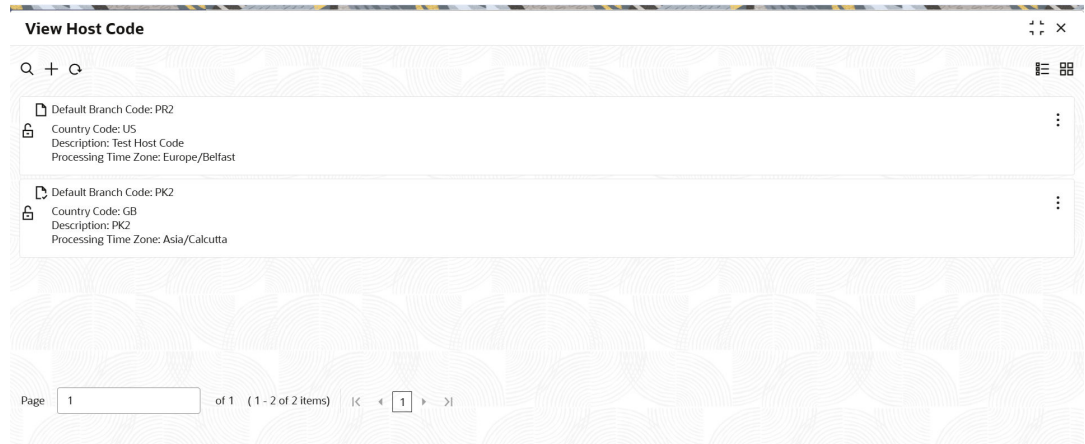
This topic provides systematic instructions to view the record in list view.

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 appears in list view.

Figure 2-9 List View

2.3.3 Search the Records

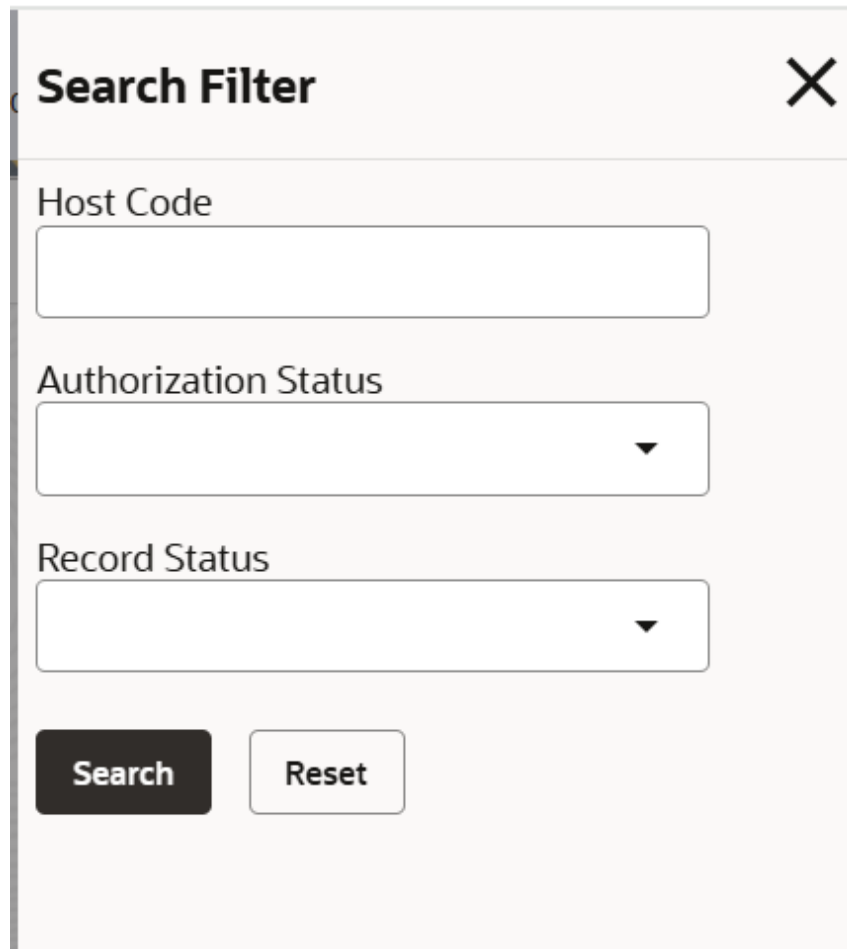
This topic provides systematic instructions to search the records.

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 2-10 Search

A screenshot of a 'Search Filter' dialog box. The dialog has a title bar with 'Search Filter' and a close button (X). Inside, there are three input fields: 'Host Code' (a text box), 'Authorization Status' (a dropdown menu), and 'Record Status' (a dropdown menu). At the bottom, there are two buttons: 'Search' (a dark button with white text) and 'Reset' (a light button with dark text).

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

2.3.4 Refresh the Records

This topic provides systematic instructions to refresh the records.

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

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

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

2.3.5 Create / Configure the Records

This topic provides 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>**.

2.3.6 Edit the Records

This topic provides 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.

2.3.7 Copy the Records

This topic provides 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.

2.3.8 Unlock the Records

This topic provides 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.

2.3.9 Reopen the Records

This topic provides 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.

2.3.10 Delete the Records

This topic provides 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.

2.3.11 Print the Records

This topic provides 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.

2.3.12 Authorize the Records

This topic provides systematic instructions to authorize the record.

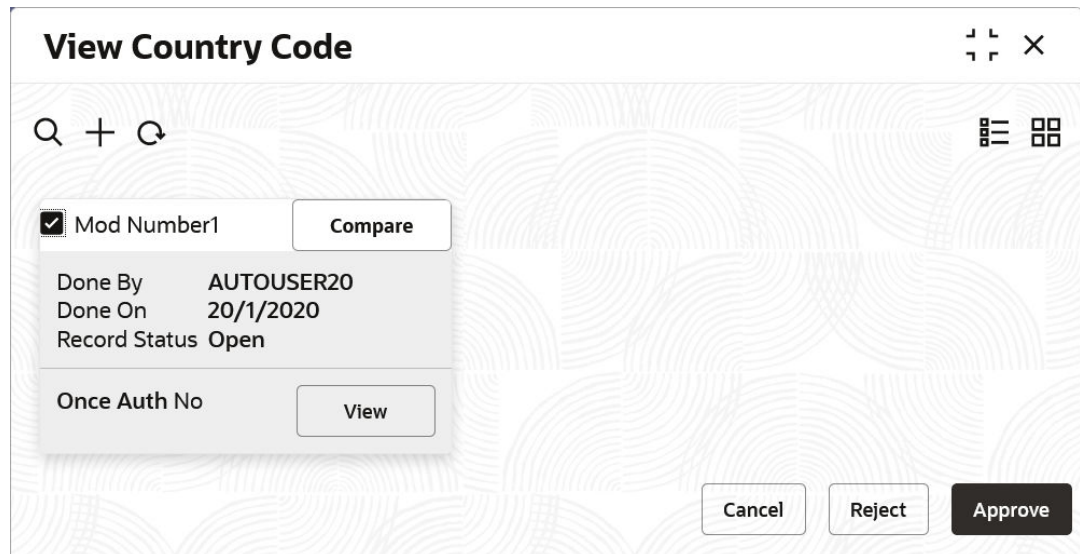
Specify **User ID** and **Password**, and login to **Home** screen.

1. Navigate to **Summary - Maintenance** screen.

2. Click  icon on the unauthorized record which needs to be actioned.
3. Click **Authorize**.

The **Authorization** screen displays..

Figure 2-11 Authorize



4. Click **View** to view the record.

Note

If the Enforce View before Authorize toggle is enabled in External Bank Parameter Maintenance screen, the user must view the record before approving or rejecting.

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

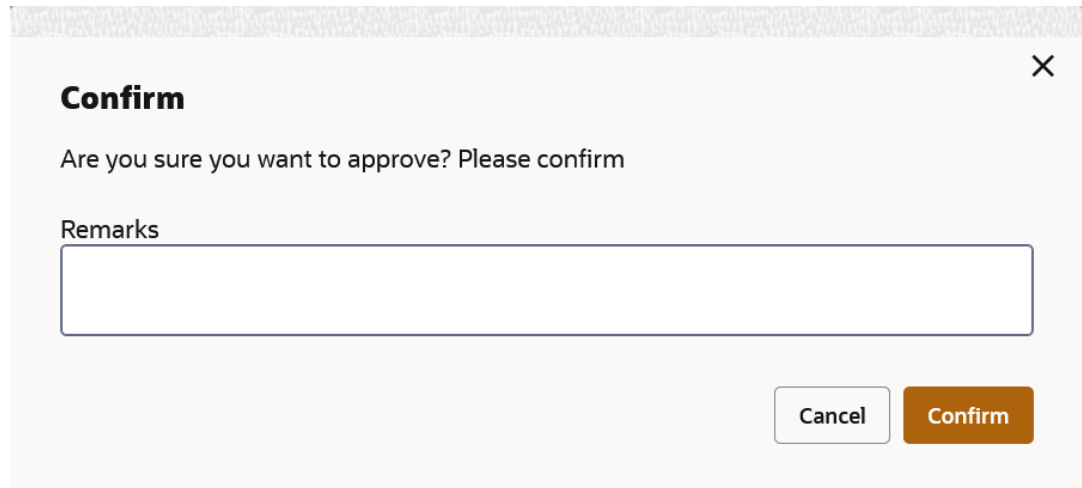
Note

- 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 approve the record:

7. Click **Approve** to approve the record.

The **Approval Confirmation** popup screen displays.

Figure 2-12 Approval ConfirmationA dialog box titled "Confirm" with a close button (X) in the top right corner. The text inside says "Are you sure you want to approve? Please confirm". Below this is a text input field labeled "Remarks". At the bottom right are two buttons: "Cancel" and "Confirm".

Confirm

Are you sure you want to approve? Please confirm

Remarks

Cancel Confirm

8. Specify the approval remarks in the **Remarks** field.

9. Click **Confirm** to approve the record.

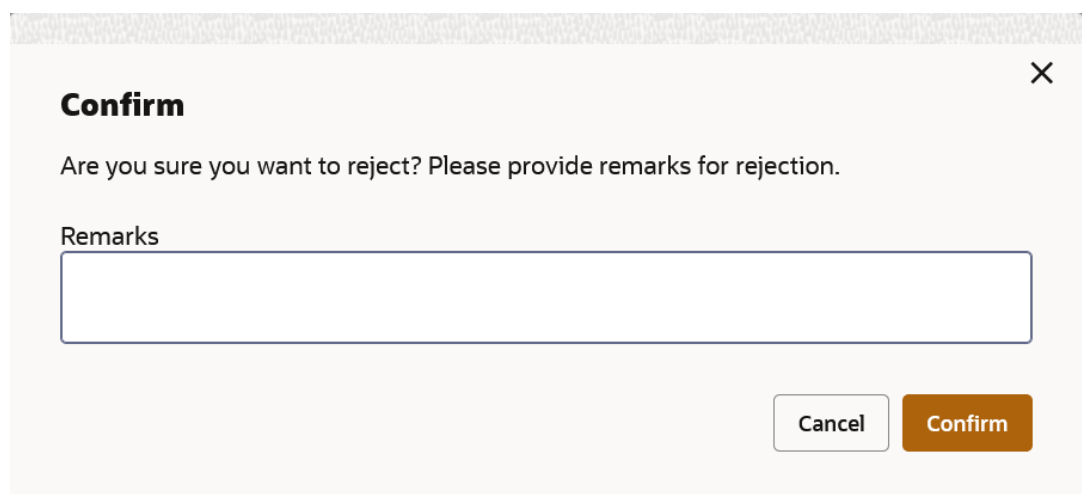
The selected record is approved and the approval remarks can be viewed in **Audit** screen. Refer **Audit the Record** topic for the detailed explanation.

10. Click **Cancel** to discard the approval.

To reject the record:

11. Click **Reject** to reject the record.

The **Rejection Confirmation** popup screen displays.

Figure 2-13 Rejection ConfirmationA dialog box titled "Confirm" with a close button (X) in the top right corner. The text inside says "Are you sure you want to reject? Please provide remarks for rejection." Below this is a text input field labeled "Remarks". At the bottom right are two buttons: "Cancel" and "Confirm".

Confirm

Are you sure you want to reject? Please provide remarks for rejection.

Remarks

Cancel Confirm

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

Note

The **Remarks** is mandatory while rejecting the record.

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

The selected record is rejected and the rejection remarks can be viewed in **Audit** screen. Refer [#unique_58](#) topic for the detailed explanation.

14. Click **Cancel** to discard the rejection.

2.3.13 Minimize and Maximize the Records

This topic provides 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 appears at the bottom left corner of the screen.

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

The screen is maximized.

2.3.14 Close the Records

This topic provides 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 appears prompting to save the changes.

2.3.15 Audit the Records

This topic provides 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 appears.

Figure 2-14 Audit

Maker	Checker
 OBTFFPM06	 ADMIN01
 May 5, 2021 at 5:30:00 AM	 April 20, 2022 at 5:30:00 AM
Status	Modification No
☒ Authorized	2
☒ Open	Show History

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

2.4 Screen / Dashboard

This topic describes about Screen / Dashboard.

- [Pagination](#)
This topic describes about pagination.
- [Mandatory and Optional Fields](#)
This topic describes about mandatory and optional fields.
- [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.

2.4.1 Pagination

This topic describes about pagination.

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.

2.4.2 Mandatory and Optional Fields

This topic describes about mandatory and optional fields.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the **Required** text. 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.

2.4.3 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.

2.4.4 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.

2.4.5 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 appears on a complete row to view more information.

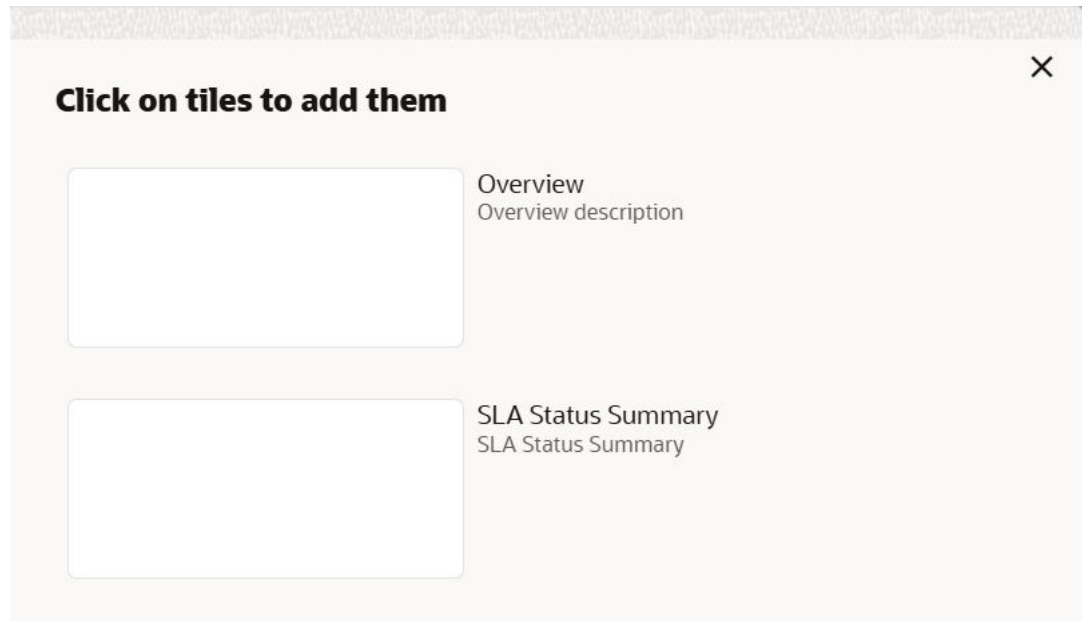
2.4.6 Add Tile

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 2-15 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.

2.5 Common Fields

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

The list of common fields are as follows.

Table 2-6 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.

Table 2-6 (Cont.) Common Fields

Fields	Description
Status	Displays the status of the record: • 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.

2.6 Common Buttons

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

The list of common buttons are as follows.

Table 2-7 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	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 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.
<	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.

Glossary

Hamburger Menu

Available in the top corner of the application. You can click to access the menu and sub-menu associated with the application.

Display Grid

It is a container that consists of fields and action buttons that allows you to view/perform actions.

Menu

It is a list of features that are organized for easy access. Generally, there are several sub-menus associated with a menu, each sub-menu has a set of features either in a sequence or non-sequence manner.

User Profile

Provides information associated with the logged in user and provides few action that a user can perform.

Sign In

Log in to an application to access the application/records.

Sign Out

Log out/leave the application.

Records

It is a piece of information that is configured using the application.

Index

A

Access Application, [1](#)
Access the Records, [11](#)
Add Tile, [22](#)
Application Environment, [3](#)
Audit the Records, [20](#)
Authorize the Records, [17](#)

C

Close the Records, [20](#)
Common Buttons, [24](#)
Common Fields, [23](#)
Copy the Records, [16](#)
Create / Configure the Records, [15](#)

D

Dashboard, [4](#)
Dashboard Widget, [5](#)
Delete the Records, [17](#)

E

Edit the Records, [16](#)
Expand Tile, [22](#)

H

How to's, [10](#)

L

List View, [13](#)

M

Maintenance Screen, [8](#)

Mandatory and Optional Fields, [21](#)
Minimize and Maximize the Records, [20](#)

P

Pagination, [21](#)
Print the Records, [17](#)

R

Refresh the Records, [15](#)
Remove Tile, [22](#)
Reopen the Records, [17](#)
Reorder Tile, [22](#)

S

Screen / Dashboard, [21](#)
Screen Environment, [4](#)
Search the Records, [14](#)
Sign In, [1](#)
Sign Out, [2](#)
Summary Screen, [9](#)

T

Tile View, [12](#)
Tile View with Context Menu, [12](#)

U

Unlock the Records, [16](#)

V

View the Records, [11](#)