# Oracle® Banking Supply Chain Finance Cloud Service Oracle Banking Getting Started User Guide





Oracle Banking Supply Chain Finance Cloud Service Oracle Banking Getting Started User Guide, Release 14.8.1.0.0 G44475-01

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# Contents

## Preface

Purpose		I
Module Pi	re-requisite	i
Audience		i
Basic Acti	ions	i
Conventions		ii
Diversity a	and Inclusion	iii
Documen	tation Accessibility	iii
Common	Buttons/Icons	iii
Related R	Resources	vii
Screensh	ot Disclaimer	vii
Module Po	ost-requisite	vii
Access	s Application	
1.1 Sigr	n In	1
1.2 Sigr	n Out	2
Applica	ation Environment	
2.1 Scr	een Environment	2
2.1.1	Dashboard	2
2.1.2		3
2.1.3		4
	,	
How to	o's	
3.1 Acc	cess the Records	2
	w the Records	2
3.2.1		2
3.2.2		3
3.2.3	List View	4
		•
	arch the Records / Transactions	4
3.3.1	arch the Records / Transactions Search the Records	4

3.3.2 Search the Transactions	5
Refresh the Records	7
Create / Configure the Records	7
Copy the Records	8
Unlock the Records	8
Reopen the Records	8
Delete the Records	9
Print the Records	9
Authorize the Records / Transactions	9
3.11.1 Authorize the Records	9
3.11.2 Authorize the Transactions	12
Minimize and Maximize the Records	13
B Close the Records	13
Audit the Records	14
reen / Dashboard	
Pagination	1
Mandatory and Optional Fields	1
Mandatory and Optional Fields  Remove Tile	1
-	
Remove Tile	1
Remove Tile Reorder Tile	1 1
Remove Tile Reorder Tile Expand Tile	1 1 2
	Copy the Records Unlock the Records Reopen the Records Delete the Records Print the Records Authorize the Records / Transactions 3.11.1 Authorize the Records 3.11.2 Authorize the Transactions Minimize and Maximize the Records Close the Records Audit the Records



## **Preface**

- Purpose
- Module Pre-requisite
- Audience
- Basic Actions
- Conventions
- Diversity and Inclusion
- Documentation Accessibility
- Common Buttons/Icons

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

- Related Resources
- Screenshot Disclaimer
- Module Post-requisite

## Purpose

This guide helps to get started with Oracle Banking applications. It explains the basic design of Oracle and the common operations that 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 Pre-requisite

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

## **Audience**

This guide is intended for the Customer Service Representatives (CSR) and staff responsible for setting up new products in your bank.

## **Basic Actions**

The basic actions performed in the screens are as follows:



**Table 1 Basic Actions** 

Actions	Description
	·
Approve	Click <b>Approve</b> to approve the initiated record.  This button is displayed once you click <b>Authorize</b> .
Audit	Click <b>Audit</b> to view the maker details, checker details of the record.  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 same. Only a checker can authorize a record.  This button is displayed only for the already created records. For more information on the process, refer Authorization Process.
Cancel	Click Cancel to cancel the action performed.
Close	Click <b>Close</b> to close a record. This action is available only when a record is created.
Collapse All	Click Collapse All to hide the details in the sections.  This button is displayed once you click Compare.
Compare	Click <b>Compare</b> to view the comparison through the field values of old record and the current record.  This button is displayed in the widget once you click <b>Authorize</b> .
Confirm	Click Confirm to confirm the action performed.
Expand All	Click <b>Expand All</b> to expand and view all the details in the sections.  This button is displayed once you click <b>Compare</b> .
New	Click <b>New</b> to add a new record. The system displays a new record to specify the required data. The fields marked with Required are mandatory.  This button is displayed only for the records that are already created.
ок	Click <b>OK</b> to confirm the details in the screen.
Reject	Click <b>Reject</b> to reject the initiated record.  This button is displayed once you click <b>Authorize</b> .
Save	Click <b>Save</b> to save the details entered or selected in the screen.
Unlock	Click Unlock to update the details of an existing record. The system displays an existing record in editable mode.  This button is displayed only for the records that are already created.
View	Click <b>View</b> to view the details in a particular modification stage.  This button is displayed in the widget once you click <b>Authorize</b> .
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 you click Compare.

# 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.



Convention	Meaning
italic	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.

# **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 <a href="http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc">http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc</a>.

#### **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.

## 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 described as follows.

Table 2 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.
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	Prints the configured record for the selected screen.
Authorize	Authorizes the configured record for the selected screen.
Reject	Rejects the configured record for the selected screen.



Table 2 (Cont.) List of Buttons

Button	Description
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.

Table 3 Symbols and Icons - Common

Symbol/Icon	Function
J L	Minimize
	Maximize
×	Close
Q	Perform Search
•	Open a list
$\leftrightarrow$	Date Range
1	Add a new record
K	Navigate to the first record
×I	Navigate to the last record
•	Navigate to the previous record
•	Navigate to the next record
88	Grid view
=	List view
G	Refresh



Table 3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
+	Click this icon to add a new row.
	Click this icon to delete a row, which is already added.
<b>iii</b>	Calendar
Û	Alerts
6	Unlock Option
₽	View Option
₩	Reopen Option

Table 4 Symbols and Icons – Audit Details

Symbol/Icon	Function
00	A user
<b>⊞</b>	Date and time
$\triangle$	Unauthorized or Closed status
<b>✓</b>	Authorized or Open status
0	Rejected status

Table 5 Symbols and Icons - Widget

Symbol/Icon	Function
6	Open status



Table 5 (Cont.) Symbols and Icons - Widget

Symbol/Icon	Function
	Unauthorized status
₽	Rejected status
A	Closed status
D	Authorized status
	Modification Number

Table 6 Symbols and Icons - Dashboard

Symbol/Icon	Function
000	Bar Chart
<b>&amp;</b>	Donut Chart
■	Table View
7	Filter
:::	Move Widgets
<b>U</b>	Reset



## **Related Resources**

For more information, refer to the following resources:

- Oracle® Banking Common Core User Guide
- Oracle® Banking Security Management System User Guide
- Tasks User Guide
- Supply Chain Finance User Guide
- · Receivables and Payables 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.

# Module Post-requisite

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

# **Access Application**

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*.

- <u>Sign In</u>
   This topic provides systematic instructions to sign in to the application.
- <u>Sign Out</u>
   This topic provides systematic instructions to sign out from the application.

# 1.1 Sign In

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

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

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

Figure 1-1 Sign In



2. Specify the required fields on **Sign In** screen.

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



Table 1-1 Sign In - Field Description

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

3. Click **Sign In** to login to the application.

The **Home** screen displays.

# 1.2 Sign Out

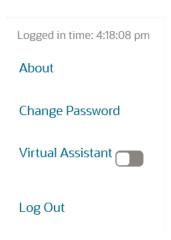
This topic provides systematic instructions to sign out from the application.

Make sure that all the fields are entered and saved.

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

The User Profile fly-out screen displays.

Figure 1-2 User Profile



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

The application logs out.

# **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.

Manu tron Search.

Dashboard

Aging of Overdue Invoices

Cash Management

Dashboard

Aging of Overdue Invoices

Cash Management

Dashboard

Payments - Invoice Recon

From Date Agril 1, 2022 To Date September 10, 2022

Invoice

Cash flow

Allocation

From Date September 1, 2022 To Date September 10, 2022

Transaction Status Details

From Date September 1, 2022 To Date September 10, 2022

Transaction Status Details

From Date September 10, 2022

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 to expand/collapse the menu.
Menu	Click to navigate/open the screens associated with the application.
Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards.



Table 2-1 (Cont.) Application Environment - Field Description

Field	Description	
Bank Name	Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user.  (i) Note  Depending on the logged in user and the branches associated, the user can switch between branches and view the records.	
Application Date	Displays the last performed application date of branch's EOD.	
User Profile	Displays the user profile related options and actions.	

#### Screen Environment

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

## 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

This topic describes about the various components in 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.

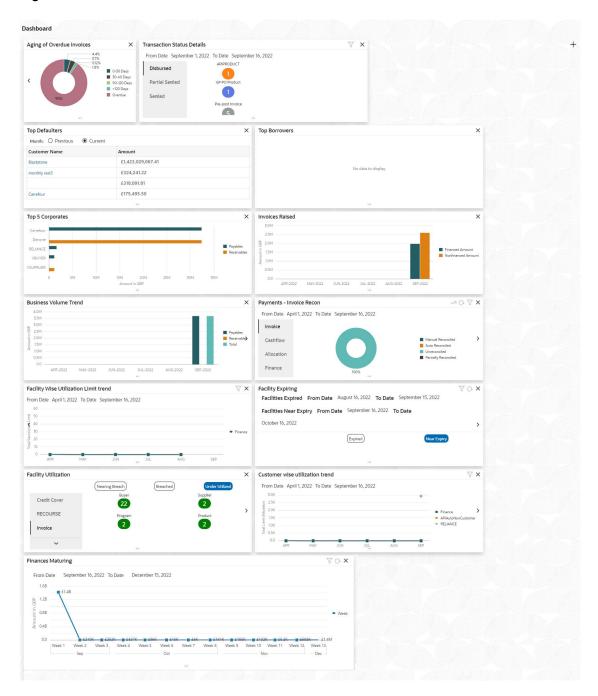
#### 2.1.1 Dashboard

This topic describes about the various components in 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 analyze the situation and take the necessary actions.



Figure 2-2 Dashboard



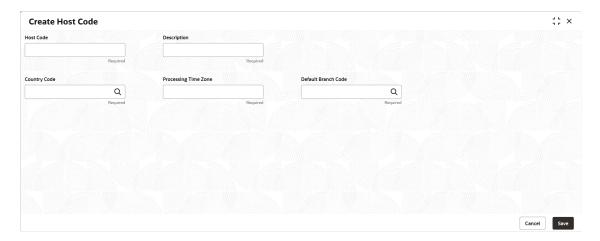
## 2.1.2 Maintenance Screen

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 Maintenance screen. The Maintenance 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 2-3 Maintenance Screen



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

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 Close the Records.
Save	Click to save the entered details.
Cancel	Click to cancel the entered details.

## 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 information about the configured records, where the user can perform few common actions and view the records.



Figure 2-4 Summary Screen

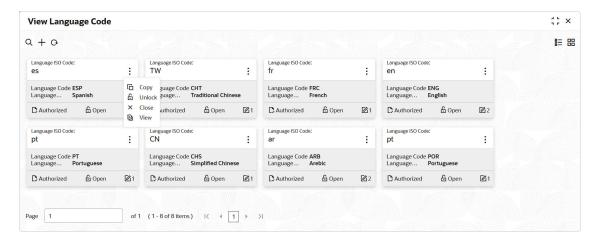


Table 2-3 Summary Screen – Field Description

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 Close the Records.
Records	Displays the configured records. The user can view the records in different format. For more information, refer to View the 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.

As a new user, you 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 the various formats to view the records.

#### Search the Records / Transactions

This topic describes the instruction to search the records/transactions.

#### 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.

#### 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 / Transactions

This topic describes the instruction to authorize the records/transactions.

#### 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.



## 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>, and click <name of the screen>.

The screens associated with the sub-menu appears.

3. Click Create <name of the screen>.

The Create <name of the screen> screen displays. The user can create/configure the new records.

4. Click View <name of the screen>.

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

## 3.2 View the Records

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

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

The various formats to view the records are as follows:

Tile View

This topic describes about viewing the records in tile view.

<u>Tile View with Context Menu</u>

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

List View

This topic describes about viewing the record in list view.

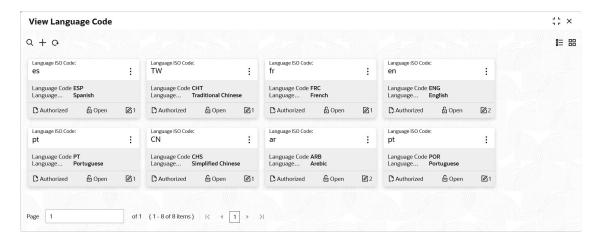
## 3.2.1 Tile View

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

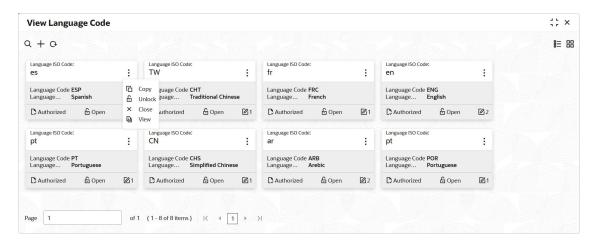


## 3.2.2 Tile View with Context Menu

This topic describes about viewing the records 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.

Figure 3-2 Tile View with Context Menu



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

Table 3-1 Tile View with Context Menu - Field Description

Field	Description
Context Menu	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.



#### 3.2.3 List View

This topic describes about viewing the record in list view.

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

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

The List View displays with the details.

Figure 3-3 List View



## 3.3 Search the Records / Transactions

This topic describes the instruction to search the records/transactions.

- Search the Records
  - This topic provides systematic instructions to search the records.
- Search the Transactions

This topic provides the systematic instructions to search the transactions.

## 3.3.1 Search the Records

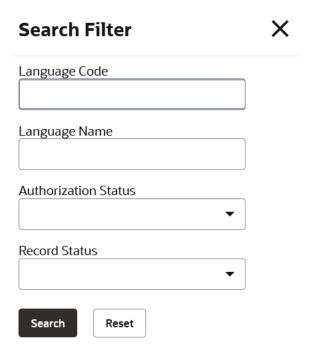
This topic provides systematic instructions to search the records.

- Navigate to Summary Maintenance screen.
- Click Search button.

The fields associated with the screen displays.



Figure 3-4 Search - Maintenance



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

Table 3-2 Search - Field Description

Field	Description
<specific parameters="" search=""></specific>	Specify the applicable search parameters for the respective summary screen.
Authorization Status	Select the authorization status to filter the records. The available options are:  • Authorized  • Unauthorized  • Rejected
Record Status	Select the record status to filter the records. The available options are:     Open     In Progress     Closed

- **3.** Specify the required fields.
- 4. Click Search.

The requested record displays.

## 3.3.2 Search the Transactions

This topic provides the systematic instructions to search the transactions.

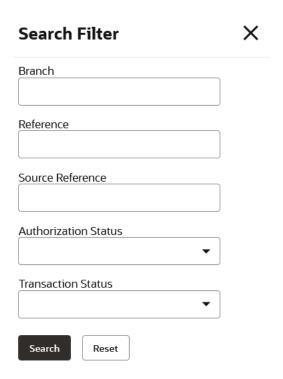
1. Navigate to **Summary - Transaction** screen.



#### 2. Click **Search** button.

The fields associated with the screen displays.

Figure 3-5 Search - Transaction



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

**Table 3-3 Search - Field Description** 

Field	Description
<specific parameters="" search=""></specific>	Specify the applicable search parameters for the respective summary screen.
Authorization Status	Select the authorization status to filter the transactions. The available options are:  • Authorized  • Unauthorized  • Rejected
Transaction Status	Select the transaction status to filter the transactions. The available options are:

- 3. Specify the required fields.
- 4. Click Search.

The requested transaction displays.



## 3.4 Refresh the Records

This topic provides systematic instructions to refresh the records.

- 1. Navigate to Summary screen.
- Click Refresh button.

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

# 3.5 Create / Configure the Records

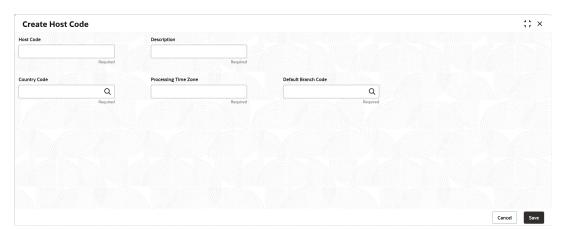
This topic provides systematic instructions to create / configure the records.

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

- 1. In the selected **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 Host Code** screen shown for reference.

Figure 3-6 Create Host Code



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

The Save - Confirmation Message pop-up screen displays.



Figure 3-7 Save - Confirmation Message



- 5. 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 <u>Audit</u> the <u>Records</u> topic for the detailed explanation.

7. Click Cancel to discard the changes.

# 3.6 Copy the Records

This topic provides systematic instructions to copy the record.

- 1. Navigate to Summary screen.
- 2. Click on the record that needs to be copied.
- 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.

## 3.7 Unlock the Records

This topic provides systematic instructions to unlock the record.

- 1. Navigate to Summary screen.
- 2. Click the record that needs to be unlocked.
- Click Unlock to unlock the selected record details and do the required changes to the record.
- Click Save.

The modified record is saved.

# 3.8 Reopen the Records

This topic provides systematic instructions to reopen the record.



- 1. Navigate to Summary screen.
- Click the record that needs to be reopened.
- 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 systematic instructions to delete the record.

Note

Make sure that the user have privileges and know the guidelines to delete the records.

- 1. Navigate to Summary screen.
- 2. Click the **Record** that needs to be deleted.
- 3. Click Delete.

The selected record is deleted.

## 3.10 Print the Records

This topic provides systematic instructions to print the record.

- Navigate to Summary screen.
- 2. Click the record that needs to be printed.
- 3. Click **Print** to view the record in a print format.

The selected record is printed.

## 3.11 Authorize the Records / Transactions

This topic describes the instruction to authorize the records/transactions.

- Authorize the Records
  - This topic provides systematic instructions to authorize the record.
- Authorize the Transactions

This topic provides the systematic instructions to authorize the transaction.

## 3.11.1 Authorize the Records

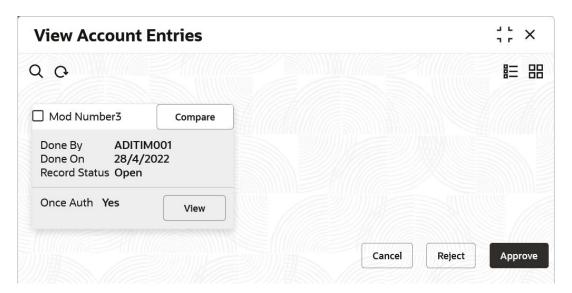
This topic provides systematic instructions to authorize the record.

- 1. Navigate to **Summary Maintenance** screen.
- 2. Click **Action** icon on the unauthorized record which needs to be authorized.
- 3. Click Authorize.



The Authorization screen displays.

Figure 3-8 Authorization



Click View to view the record.

#### (i) 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.

#### (i) Note

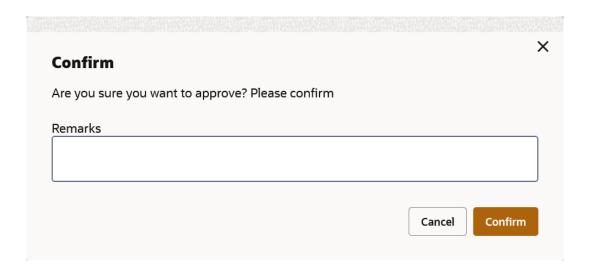
- If the lower modification has to be rejected, all the higher modifications (if any) must also be rejected.
- If the higher modification has to be approved, all the lower modifications (if any) must also be approved.

#### To approve the record:

Click Approve to approve the record.

The **Approval Confirmation** pop-up screen displays.





- 8. Specify the approval remarks in the **Remarks** field.
- Click Confirm to approve the record.

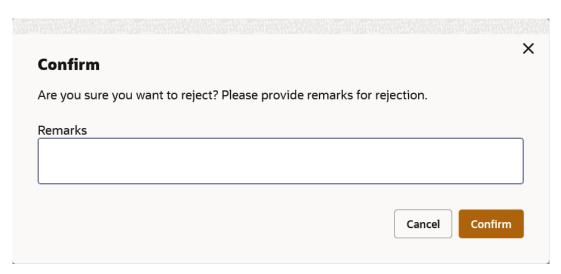
The selected record is approved and the approval remarks can be viewed in **Audit** screen. Refer <u>Audit the Records</u> topic for the detailed explanation.

10. Click Cancel to discard the approval.

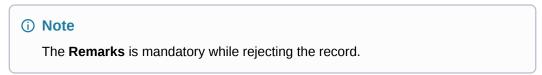
#### To reject the record:

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

The **Rejection Confirmation** pop-up screen displays.



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



13. Click Confirm to reject the record.



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

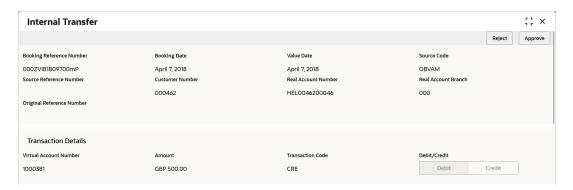
14. Click **Cancel** to discard the rejection.

## 3.11.2 Authorize the Transactions

This topic provides the systematic instructions to authorize the transaction.

- Navigate to Summary Transaction screen.
- Click Action icon on the unauthorized transaction which needs to be authorized.
- 3. Click Authorize.

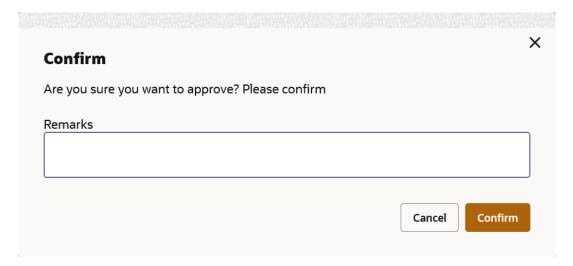
The Authorization screen displays.



#### To approve the transaction:

Click Approve to approve the transaction.

The **Approval Confirmation** pop-up screen displays.



- 5. Specify the approval remarks in the **Remarks** field.
- **6.** Click **Confirm** to approve the transaction.

The selected transaction is approved and the approval remarks can be viewed in **Audit** screen. Refer <u>Audit the Records</u> topic for the detailed explanation.

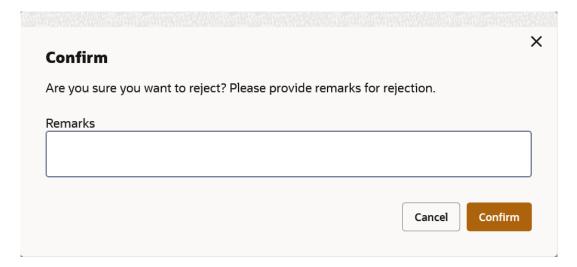
7. Click **Cancel** to discard the approval.



#### To reject the transaction:

8. Click **Reject** to reject the transaction.

The Rejection Confirmation pop-up screen displays.



Specify the rejection remarks in the Remarks field.



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

**10.** Click **Confirm** to reject the transaction.

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

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

## 3.12 Minimize and Maximize the Records

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

- 1. Navigate to Summary 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.

## 3.13 Close the Records

This topic provides systematic instructions to close the record.

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

The selected record is closed.





#### (i) Note

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 systematic instructions to audit the record.

- 1. Navigate to Summary screen.
- Click **Options** icon and click **Unlock** or **View** button to modify/view the record.
- On Maintenance screen, click Audit to view the change history of the record. The Audit detail pop-up screen appears.

Figure 3-9 Audit

Maker	Checker
ADMINUSER1	O ADMINUSER2
<b>iii</b> 2018-04-09 11:50:44	2018-05-09 1254:48
AMOUNT INCREASED FROM 10000 USD TO 20000 USD	AMOUNT VERIFIED
Status	Modification No
△ Unauthorized	3
⊘ Open	Show History

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



#### Note

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

The Modification History pop-up screen displays in the reverse chronological order.



#### Figure 3-10 Modification History

Modification No: 3 Authorization Status: Unauthorized	Maker: ADMINUSER1 Maker Remarks: AMOUNT CHANGED	Checker: Checker Remarks: AMOUNT VERIFIED
Record Status: Open	Maker Date Time: April 9, 2018 at 11:50:44 AM	Checker Date Time:
Modification No: 2	Maker: ADMINUSER1	Checker: ADMINUSER1
Authorization Status: Authorized	Maker Remarks: close	Checker Remarks: Auto Authorize
Record Status: Closed	Maker Date Time: April 9, 2018 at 6:30:03 PM	Checker Date Time: April 9, 2018 at 6:30:0 PM
Modification No: 1	Maker: ADMINUSER1	Checker: ADMINUSER1
Authorization Status: Authorized	Maker Remarks: -	Checker Remarks: -
Record Status: Open	Maker Date Time: April 9, 2018 at 4:20:33 AM	Checker Date Time: April 9, 2018 at 4:20:33

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

## Screen / Dashboard

This topic describes about 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 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.

## 4.1 Pagination

This topic describes about the pagination details in the screen.

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

# 4.2 Mandatory and Optional Fields

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

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

### 4.3 Remove Tile

This topic describes the systematic instructions to remove the 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 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 tile.

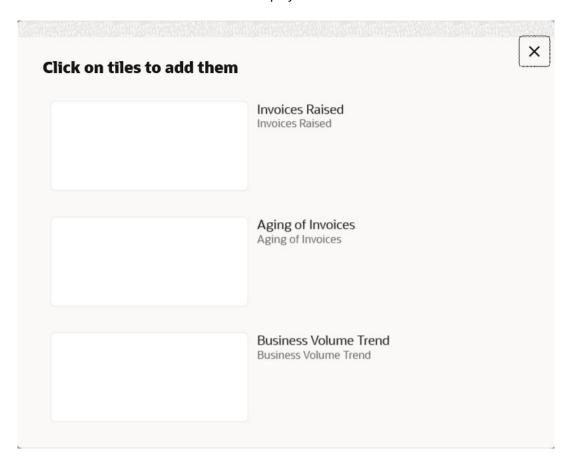
Click Expand Tile to view all the information of the dashboard widget.
 The expanded widget appears on a complete row to view more information.

## 4.6 Add Tile

This topic describes the systematic instructions to add the 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.



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 information about all the common fields used in the application.

The list of common fields are as follows.

**Table 5-1 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 <b>Create External Customer</b> 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 <b>Create External Customer Account</b> 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 <b>Create Upload Source</b> 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 <b>Create Host Code</b> 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 <b>Create Currency Definition</b> screen.
Status	<ul> <li>Displays the status of the record:</li> <li>Authorized: The record is verified and authorized.</li> <li>Unauthorized: The record is not verified.</li> <li>Rejected: The record is rejected.</li> <li>Open: The record is open and waiting for verification.</li> <li>Locked: The record is locked.</li> <li>Closed: The record is closed.</li> </ul>

# Index

A	Mandatory and Optional Fields, 1 Minimize and Maximize the Records, 13
Access Application, 1 Access the Records, 2 Add Tile, 2	P
Application Environment, 1 Audit the Records, 14 Authorize the Records, 9	Pagination, 1 Print the Records, 9
Authorize the Records / Transactions, 9 Authorize the Transactions, 12	R
С	Refresh the Records, 7 Remove Tile, 1 Reopen the Records, 8
Close the Records, 13 Common Buttons/Icons, iii	Reorder Tile, 1
Common Fields, 1 Copy the Records, 8 Create / Configure the Records, 7	Secretary / Deathbroad /
D	Screen / Dashboard, 1 Screen Environment, 2 Search the Records, 4
Dashboard, 2 Delete the Records, 9	<ul> <li>Search the Records / Transactions, 4</li> <li>Search the Transactions, 5</li> <li>Sign In, 1</li> </ul>
E	Sign Out, 2 Summary Screen, 4
Expand Tile, 2	Т
Н	Tile View, 2 Tile View with Context Menu, 3
How to's, 1	U
<u>L</u>	Unlock the Records, 8
List View, 4	V
M	View the Records, 2
Maintenance Screen, 3	

Mandatory and Optional Fields, 1