

Oracle Banking Trade Finance Process Management Cloud Service

Priority Code Maintenance User Guide



Release 14.8.0.0.0

G30025-01

April 2025

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

ORACLE®

Oracle Banking Trade Finance Process Management Cloud Service Priority Code Maintenance User Guide, Release 14.8.0.0.0

G30025-01

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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](#)
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Purpose

This manual is designed to help you quickly get acquainted with the **Priority Code Maintenance** handled in Oracle Banking Trade Finance Process Management Cloud Service.

Audience

This document is intended for the following audience:

- Oracle Implementers
- Customer Service Representatives (CSRs)
- Oracle user

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>.

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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.

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.

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.

Related Documents

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

- Getting Started User Guide
- Oracle Banking Common Core 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.

Acronyms and Abbreviations

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

Table 1 Acronyms and Abbreviations

Abbreviation	Description
OBTFFPM	Oracle Banking Trade Finance Process Management
OBTFFPMCS	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

Basic Actions

Most of the screens contain Action Buttons to perform all or a few of the basic actions. The actions which are called here are generic, and it varies based on the usage and the applicability. The table below gives a snapshot of them:

Table 2 Common Action Buttons and its Definitions

Action Buttons	Description
Reject	<p>On click of Reject, user must select a Reject Reason from a list displayed by the system.</p> <p>Reject Codes are:</p> <ul style="list-style-type: none"> • R1- Documents missing • R2- Signature Missing • R3- Input Error • R4- Insufficient Balance/Limits • R5 - Others <p>Select a Reject code and give a Reject Description. This reject reason will be available in the remarks window throughout the process.</p>

Table 2 (Cont.) Common Action Buttons and its Definitions

Action Buttons	Description
Refer	Select a Refer Reason from the values displayed by the system. Refer Codes are: <ul style="list-style-type: none"> • R1- Documents missing • R2- Signature Missing • R3- Input Error • R4- Insufficient Balance/Limits • R5 - Others
Hold	The details provided will be saved and status will be on hold. User must update the remarks on the reason for holding the task. This option is used, if there are any pending information yet to be received from applicant.
Cancel	Click Cancel to cancel the transaction input midway without saving any data.
Save & Close	Click Save & Close to save the details provided and holds the task in 'My Task' queue for further update. This option will not submit the request.
Next	Click Next , system validates if all the mandatory fields have been captured. Necessary error and override messages to be displayed. On successful validation, system moves the task to the next data segment.
Submit	Click Submit to complete the transaction after you specify all the input parameters for a particular process. The task will get moved to next logical stage of the process. If mandatory fields have not been captured, system will display an error message until the mandatory fields data are provided.

Symbols and Icons

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

Table 3 Symbols and Icons - Common






Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list

Table 3 (Cont.) Symbols and Icons - Common























Symbol/Icon	Function
	Date Range
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts
	Unlock Option
	View Option
	Reopen Option

Table 4 Symbols and Icons - Widget

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

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Priority Code Maintenance

This process illustrates the Priority Code Maintenance handled in Oracle Banking Trade Finance Process Management Cloud Service.

Bank can set priorities for the transactions based on the Customer for each Process. If required, Bank can also modify, delete or view those maintained priorities.

The user can defined Priority Codes. The user also has facility to Create View and Update the priority code. There can be up to five Priority Codes.

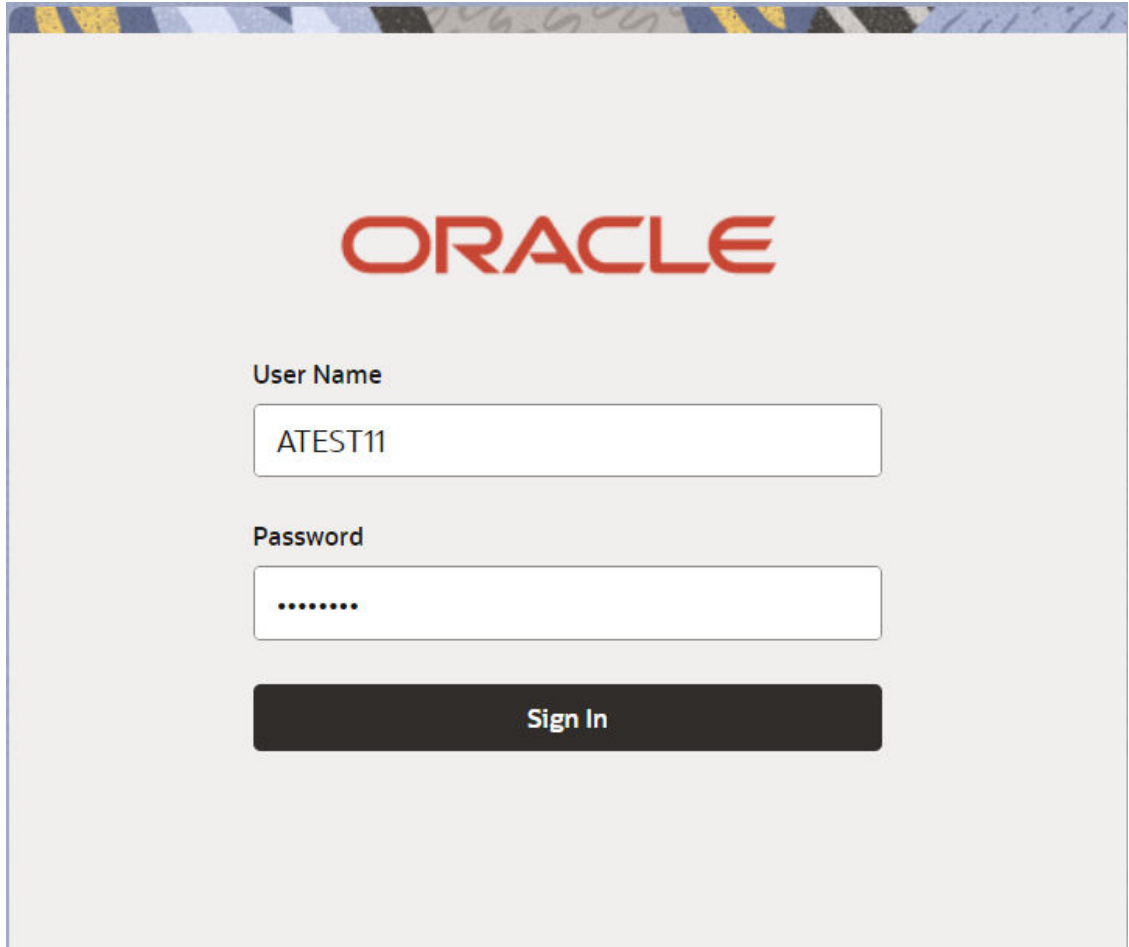
This topic contains following sub-topics:

- [Create Priority Code Maintenance](#)
This topic provides the information to the user to create a priority code. In the subsequent steps, let's look at the steps of creating a priority code:
- [View Priority Code Maintenance](#)
This topic provides the systematic instructions to view the record maintained in the "Priority Code Maintenance" screen as a single tile.

1.1 Create Priority Code Maintenance

This topic provides the information to the user to create a priority code. In the subsequent steps, let's look at the steps of creating a priority code:

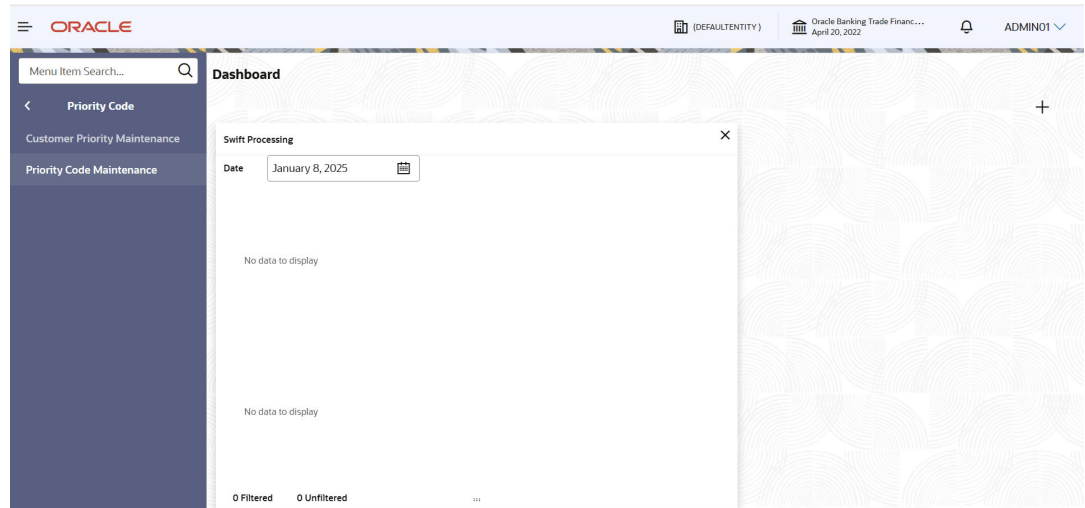
Specify **User ID** and **Password**, and login to **Home** screen.



The screenshot shows the Oracle login interface. At the top center is the Oracle logo in red. Below the logo, there are two input fields. The first is labeled 'User Name' and contains the text 'ATEST11'. The second is labeled 'Password' and contains seven dots. Below these fields is a dark grey button with the text 'Sign In' in white.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **Priority Code**.
2. Under **Priority Code**, click **Priority Code Maintenance**.

Figure 1-1 Priority Code Maintenance



The **Priority Code Maintenance** screen gets displayed.

Sequence Number	Priority Id	Priority Name	Remarks	Default Priority	Active	Edit
2	M	Medium		<input type="checkbox"/>	<input type="checkbox"/>	
3	H	High		<input type="checkbox"/>	<input type="checkbox"/>	
5	E	Essential		<input type="checkbox"/>	<input type="checkbox"/>	
4	C	Critical		<input type="checkbox"/>	<input type="checkbox"/>	
1	L	Low		<input type="checkbox"/>	<input type="checkbox"/>	


3. Click  icon to add priority code.
4. On **Priority Code Maintenance** screen, specify the fields.
For more information on fields, refer to the field description table below.

Table 1-1 Priority Code Maintenance - Field Description

Field	Description
Sequence Number	System defaults the sequence number from 1 to 5, where Code 1 denotes the least priority and Code 5 denotes the highest priority. System allows the user to add a maximum of 5 sequence number and exceeding the same system should disable the + button. Maximum of 5 sequence numbers are allowed as a part of this maintenance screen.
Priority Id	Priority Id of the priority code.
Priority Name	Specify the priority name in which you like to have a priority against each Priority Code. Priority Name should be unique.
Remarks	Specify the priority description.
Default Priority	Enable the option, to mark any one Priority Code as the default Priority. One Priority Code has to be mandatorily marked as "Default Priority" code. If no default priority code is selected or more than one Priority Code is selected as Default Priority Code then System has to validate and display an error message. Default Priority Code will be populated in the Task under Priority field, if no Priority Code is maintained for the Customer of the Task.
Active	Enable the option, for the respective Priority code to be active. Only Active Priority Codes will be allowed for mapping in the "Customer Priority Code Maintenance" screen. User can disable a priority code, in such cases if there are any underlying active tasks in that priority code then system has to show a warning message saying "The existing active transactions in the disabled priority will be changed to the default priority". At least one Priority Code has to be Active.
Edit	Edit button to edit the records before save.

5. Click **Save** to save the record.

The priority code gets created.

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

Table 1-2 Priority Code Maintenance - Action Buttons - Field Description

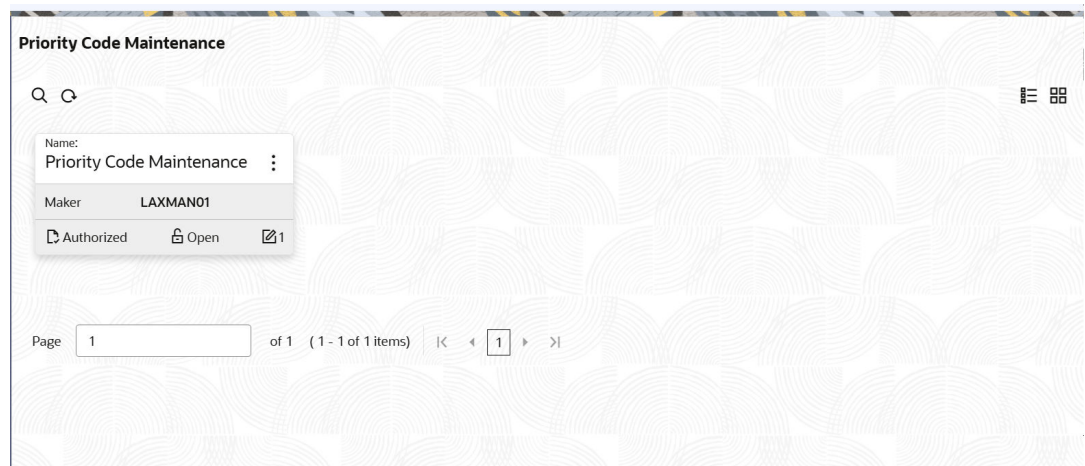
Field	Description
Save	Click the Save button to save the record.
Cancel	Click the Cancel button to cancel the record.

1.2 View Priority Code Maintenance

This topic provides the systematic instructions to view the record maintained in the "Priority Code Maintenance" screen as a single tile.

The user can view the Priority Code in the 'List' or 'Table' form, by clicking the List or Table icon on the top right corner of the screen.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **Priority Code**.
2. Under **Priority Code**, click **Priority Code Maintenance**.
The **Priority Code Maintenance** screen appears.



3. On **Priority Code Maintenance** screen, following fields are displayed.
For more information on fields, refer to the field description table below.

Table 1-3 Priority Code Maintenance - Field Description

Field	Description
Priority Name	System displays the priority name of the Priority Code. Priority Name is unique.
Maker ID	Specify displays the maker ID.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

4. Click



icon, and then click **View** to view the Priority Maintenance in list form.

Sequence Number	Priority Id	Priority Name	Remarks	Default Priority	Active	Edit
2	M	Medium		<input type="checkbox"/>	<input type="checkbox"/>	
3	H	High		<input type="checkbox"/>	<input type="checkbox"/>	
5	E	Essential		<input type="checkbox"/>	<input type="checkbox"/>	
4	C	Critical		<input type="checkbox"/>	<input type="checkbox"/>	
1	L	Low		<input type="checkbox"/>	<input type="checkbox"/>	

Audit

Audit

The screen provides information about Maker and Checker User ID details, initiated date, time, status, modification number etc.

Maker	Checker
LAXMAN01	LAXMAN02
April 5, 2018 at 5:30:00 AM	September 21, 2024 at 5:30:00 AM
Status	Modification No
<input checked="" type="checkbox"/> Authorized	1
<input type="checkbox"/> Open	

This screen provides information about user initiated the transaction, initiated date, stage wise detail etc.

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

Table 1-4 Audit - Field Description

Field	Description
Maker ID	System displays the maker ID.
Checker	System displays the checker ID.
Time stamp	System displays the maker id date and time stamp.
Time stamp	System displays the checker id date and time stamp.
Modification No.	Displays the modification number.
Status	Displays the status of the record. Values are Authorized and Unauthorized. <ul style="list-style-type: none"> Un-authorized Record – View, Unlock and Authorize. Authorized Record – View, Unlock

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