

Oracle Banking Trade Finance Process Management Cloud Service SLA Maintenance User Guide



Release 14.8.0.0.0

G30022-01

April 2025

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

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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](#)
- [Screenshot Disclaimer](#)
- [Acronyms and Abbreviations](#)
- [Basic Actions](#)
- [Symbols and Icons](#)

Purpose

This manual is designed to help you quickly get acquainted with the **SLA 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

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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

1

SLA Maintenance

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

Banks may require to have a Service Level Agreement (SLA) with its customers or as an internal policy of the Bank. This User Manual lists the SLA maintenance requirements in OBTFPMCS and other Mid-office Applications.

SLA Maintenance is available based on the Business Process-Stage- Priority combination.

SLA Maintenance to have two screens, one screen for Definition of SLA and another for Authorization/ Edit/ Delete. SLA maintenance screens are used to calculate SLA. The user can Create SLA, and View SLA (for Edit, Copy, Delete).

The user can view the tasks that are either nearing SLA breach or that have already breached SLA in the **Free Tasks** and **My Tasks** queue. The status should be indicated for tasks at both the stage as well as process level by colours such as Red and Amber.

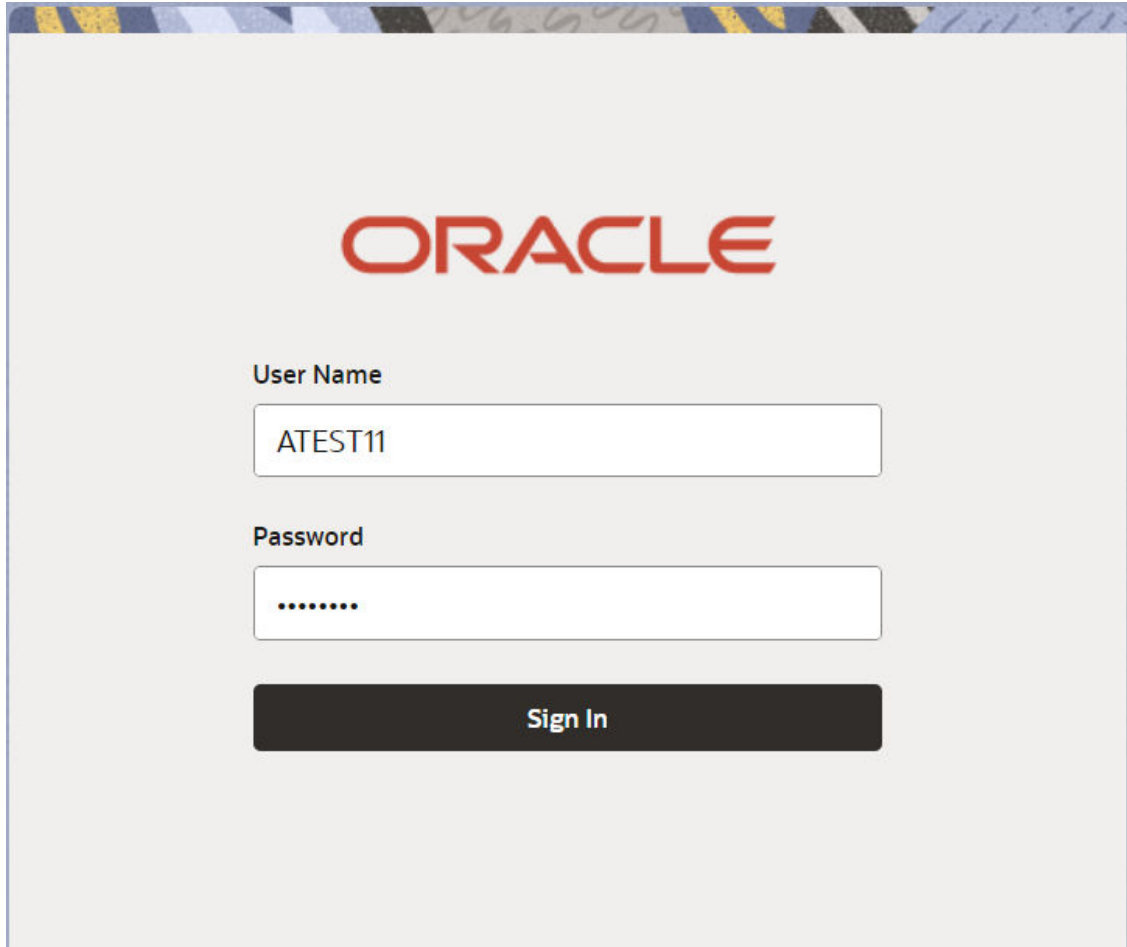
This topic contains following sub-topics:

- [Create SLA](#)
This topic provides the information to the user to create a SLA. In the subsequent steps, let's look at the steps of creating a SLA:
- [View SLA](#)
This topic provides the systematic instructions to view the record maintained in the **View SLA** screen as tiles.
- [SLA Widget](#)
This process illustrates the SLA Maintenance handled in Oracle Banking Trade Finance Process Management Cloud Service.

1.1 Create SLA

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

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

The image shows the Oracle login interface. At the top center is the Oracle logo in red. Below it, 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 the password field is a dark grey button with the text "Sign In" in white.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **SLA Maintenance**.
2. Under **SLA Maintenance**, click **Create SLA**.
The **Create SLA** screen is displayed.

Figure 1-1 Create SLA

Create SLA
⌵ ⌵

Product/Application Code

Product/Application Name

Business Process Code

Business Process Name

Branch

Branch Working Hours

Version Number

Include for SLA calculation

Branch Holidays
 Currency Holidays
 Hold Time
 Off-Branch Time Transaction
 Customer Clarification

Stage Name	Stage ID	Parallel Stage	SLA Required	Time In	Breach Alert Time	Essential Priority (In Mins) Offline	Critical Priority (In Mins) Offline	High Priority (In Mins) Offline	Medium Priority (In Mins) Offline	Low Priority (In Mins) Offline
Registration	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Scrutiny	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
DataEnrichmen	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
KYC Exceptiona	TFPM_FA_COM		<input type="checkbox"/>	Mins						
Limit Earmark E	TFPM_FA_COM	PI	<input type="checkbox"/>	Mins						
AmountBlock E	TFPM_FA_COM	PI	<input type="checkbox"/>	Mins						
DepositLink Exc	TFPM_FA_COM	PI	<input type="checkbox"/>	Mins						
Sanction Check	TFPM_FA_COM	PI	<input type="checkbox"/>	Mins						
Release LimitEa	TFPM_FA_COM	P2:P3:P4:P5:P6	<input type="checkbox"/>	Mins						
Release Amoun	TFPM_FA_COM	P2:P3:P4:P5:P6	<input type="checkbox"/>	Mins						
Release Deposit	TFPM_FA_COM	P2:P3:P4:P5:P6	<input type="checkbox"/>	Mins						
Approval Task L	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Approval Task L	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Approval Task L	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Handoff RetryTc	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Update STP Me	TFPM_FA_GTE/		<input type="checkbox"/>	Mins						
Total (In Mins)										
Overall SLA (In Mins)										

- On **Create SLA** screen, specify the fields.

 **Note:**

The fields which are marked as **Required** are mandatory.

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

Table 1-1 Create SLA - Field Description

Field	Description
Product/Application Code	Select the Product or Application Code.
Product/Application Name	System displays the name of the Product/Application (Example Oracle Banking Trade Finance Process Management Cloud Service).
Business Process Code	Select the Business Process Code for which the SLA maintenance has to be made.
Business Process Name	The Business Process name pertaining to the Business Process code selected is defaulted.
Branch	Select the branch code for which SLA maintenance has to be done. There is also an option to select All as a value which will enable the SLA to be applicable for all branches in the bank.
Branch Working Hours	System populates the branch working hours.
Version Number	System defaults the version number on creating/updating the screen.
Include for SLA calculation	<p>For calculation of SLA the user can include:</p> <ul style="list-style-type: none"> • Branch Holidays: User can select this check box, if branch holidays is to be considered for SLA calculation • Currency Holidays: User can select this check box, if currency holidays is to be considered for SLA calculation • Hold Time: User can select this check box, if hold time is to be considered for SLA calculation. • Customer Clarification: User can select this check box, if Customer Clarification items is to be considered for SLA calculation • Off Branch Time Transactions: User can select this check box, if SLA should be calculated after branch hours. <p>Below fields appear on tab out after entering the above information.</p>
Stage Name	On selection of the process code, the various stages available for the process should be defaulted.
Stage ID	System defaults the stage ID based on the stage name.
Parallel Stage	System defaults the various stages available for the process, on selection of the process code.
SLA Required	<p>This toggle indicates whether SLA calculation is required for this stage.</p> <p>User can change the value to No. If the toggle is changed to No, user input should be disabled and the SLA values for the stage should be blank.</p> <p>By Default, the toggle should be set to Yes.</p>
Time In	Select the drop-down and system displays a pop-up UI for input of the Stage SLA in Days/Hours/Minutes combination. System converts this into minutes and display in the respective fields. Alternatively, user can directly input the SLA in Minutes

Table 1-1 (Cont.) Create SLA - Field Description

Field	Description
Breach Alert Time	Specify the SLA Breach Alert time in minutes for the Stage. This will indicate the minutes before which a user needs to be alerted for likely SLA breach for the stage. This is the same for all the different priority combinations for a stage irrespective of the individual SLA times.
Low Priority (In Mins) Offline	Specify the SLA time in minutes.
Low Priority (In Mins) Online	Specify the SLA time in minutes. System validates that the time in minutes is not more than value input for offline.
Medium Priority (In Mins) Offline	Specify the SLA time in minutes. System validates that the time in minutes is not more than value input for offline.
Medium Priority (In Mins) Online	Specify the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority.
High Priority (In Mins) Offline	Specify the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority
High Priority (In Mins) Online	Specify can input the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority.

- Click **Calculate** to calculate the SLA.
- Click **Save** to save the record.

The new SLA is displayed as tile in the **View SLA**.

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

Table 1-2 SLA Maintenance - Action Buttons - Field Description

Field	Description
Save	Click the Save button to save the record.
Cancel	Click the Cancel the SLA Maintenance window and return to dashboard. The data input will not be saved.

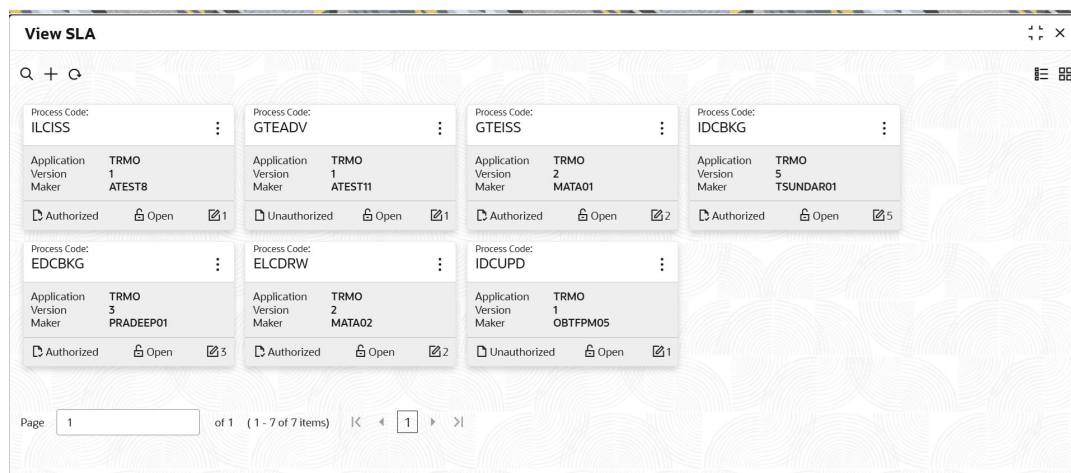
1.2 View SLA

This topic provides the systematic instructions to view the record maintained in the **View SLA** screen as tiles.

The user can view the summary of SLAs maintained in the form of tiles. The user can view the maintained SLA, if the SLA is already created in the system. The user can also create a new SLA using View SLA screen, by clicking the 'plus icon'.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **SLA Maintenance**.
2. Under **SLA Maintenance**, click **View SLA**.
The **View SLA** screen appears.

Figure 1-2 View SLA



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

Table 1-3 View SLA - Field Description

Field	Description
Process Code	System displays the Process Code. Process Code is unique.
Product/Application Name	System displays the name of the Product/Application (Example Oracle Banking Trade Finance Process Management Cloud Service).
Version	System defaults the version number on creating/updating the screen.
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 **Authorize** to authorize the SLA.

This topic contains following sub-topics:

- [Search SLA](#)
This topic provides the systematic instructions to search and view the records maintained in the **View SLA** screen as tiles.
- [SLA Standard Maintenance](#)
This topic provides the systematic instructions to view the SLA details maintained in **SLA Standard Maintenance** screen.

1.2.1 Search SLA

This topic provides the systematic instructions to search and view the records maintained in the **View SLA** screen as tiles.

The user can search the SLA already created, by entering the search criteria such as Process Code, Authorization status and Record Status. Blank search is also allowed.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **SLA Maintenance**.

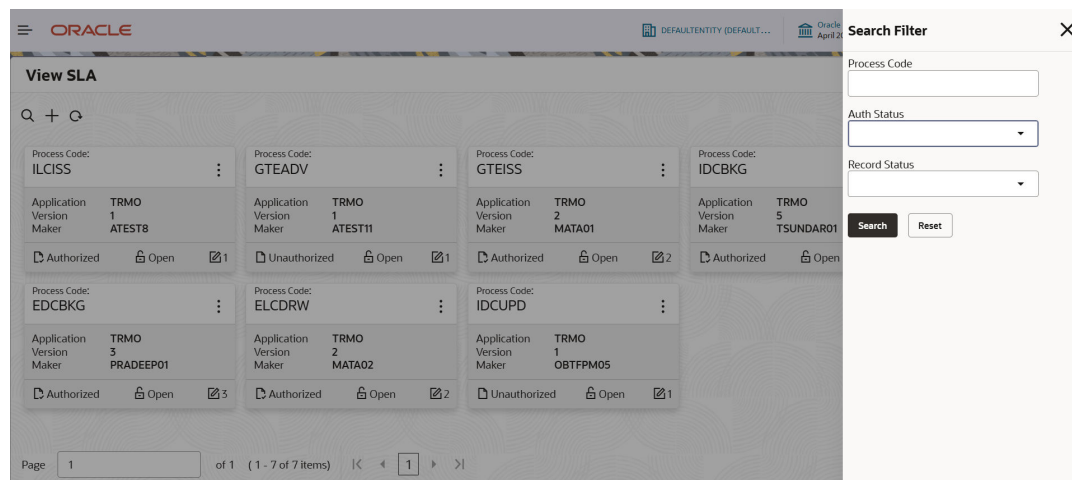
2. Under **SLA Maintenance**, click **View SLA**.

The **View SLA** screen displays.

3. On the **View SLA** screen, click the **Search** icon

The **Search Filter** overlay screen displays.

Figure 1-3 Search Filter



4. On **Search Filter** screen, specify the fields to enter the search criteria. For more information on fields, refer to the field description table below.

Table 1-4 Search Filter - Field Description

Field	Description
Process Code	Specify the Process Code. Process Code is unique.
Status	Displays the status of the record. Values are Authorized and Unauthorized.
Record Status	Displays the status of the record. Values are Open and Closed.

1.2.2 SLA Standard Maintenance

This topic provides the systematic instructions to view the SLA details maintained in **SLA Standard Maintenance** screen.

This maintenance should enable the bank user to define the SLA at the Process- Stage Priority level. This section provides a quick snapshot of SLA details. All fields displayed under in this screen, would be read only. Refer to 2.1 Creating SLA for more information of the fields.

1. On **Home** screen, click **Core Maintenance**. Under **Core Maintenance**, click **SLA Maintenance**.

2. Under **SLA Maintenance**, click **View SLA**.

The **View SLA** screen displays.

3. On the **View SLA** screen, click  on any tile.

The **SLA Standard Maintenance** screen displays.

Figure 1-4 SLA Standard Maintenance

4. On **SLA Standard Maintenance** screen, following fields are displayed.

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

Table 1-5 SLA Standard Maintenance - Field Description





Field	Description
Process Code	System displays the Process Code.
Process/Application Name	The process name is populated based on process code.
Business Process Code	System displays the business process code.
Business Process Name	The business process name is populated based on the process code.
Branch	System displays the branch code for which SLA maintenance is done.
Version Number	System defaults the version number on the screen.

Table 1-5 (Cont.) SLA Standard Maintenance - Field Description

Field	Description
Include for SLA calculation	For calculation of SLA following is included: <ul style="list-style-type: none"> • Branch Holidays: if branch holidays is to be considered for SLA calculation • Currency Holidays: if currency holidays is to be considered for SLA calculation • Hold Time: if hold time is to be considered for SLA calculation. • Customer Clarification: if Customer Clarification items is to be considered for SLA calculation • Off Branch Time Transactions: if SLA should be calculated after branch hours.
Stage Name	Based on the process code, the various stages available for the process is defaulted.
Stage ID	System defaults the stage ID based on the stage name.
Parallel Stage	System defaults the various stages available for the process, on selection of the process code.
SLA Required	This toggle indicates whether SLA calculation is required for this stage. By Default, the toggle should be set to Yes.
Time In	System displays a pop-up UI for input of the Stage SLA in Days/Hours/Minutes combination. System converts this into minutes and display in the respective fields. Alternatively, user can directly input the SLA in Minutes
Breach Alert Time	Displays the SLA Breach Alert time in minutes for the Stage. This will indicate the minutes before which a user needs to be alerted for likely SLA breach for the stage. This is the same for all the different priority combinations for a stage irrespective of the individual SLA times.
Low Priority (In Mins) Offline	Displays the SLA time in minutes.
Low Priority (In Mins) Online	Displays the SLA time in minutes. System validates that the time in minutes is not more than value input for offline.
Medium Priority (In Mins) Offline	Displays the SLA time in minutes. System validates that the time in minutes is not more than value input for offline.
Medium Priority (In Mins) Online	Displays the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority.
High Priority (In Mins) Offline	Displays the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority
High Priority (In Mins) Online	Displays the SLA time in minutes. System validates that the time in minutes is not more than value input for offline. System validates the time in minutes is not more than value for Low Priority.

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="radio"/> Authorized	1
<input type="radio"/> 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 1-6 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

1.3 SLA Widget

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

The SLA status widget is available in the Dashboard and is accessible as per user credentials. The Widget displays the SLA status maintained at the process level. The Widget displays only those tasks that are not being handed off to Back Office system.

The user can view the SLA Widget in a graphical chart (doughnut chart) as well as in Tabular form by clicking the right arrow on the widget. The tabular form displays the Status, Branch, name of the Process, Stage Name, Process Reference Number, Customer Number, Currency and Amount.

The Widget should be designed in such a way that the user should be able to view the number of items in each status for all the processes. The widget also has filter option to view the details as per filter criteria.

The SLA Status Widget highlight the tasks that are within SLA (in green), approaching SLA breach (in amber) and that have breached SLA (in red).

The user can view the tasks that are either nearing SLA breach or that have already breached SLA in the Free Task and My Task queue. The status should be indicated for tasks at both the stage as well as process level by colours such as Red and Amber.

The following table indicates the status for tasks at both the stage as well as process level:.

SLA Status (Stage)	SLA Status (Process)	Indicator
Not Breached	Not Breached	No
Breached	Not Breached	Red
Not Breached	Breached	Red
Breached	Breached	Red
Near Breach	Near Breached	Amber
Near Breach	Not Breached	Amber
Near Breach	Breached	Red
Breached	Near Breach	Red
Not Breached	Near Breach	Amber

This topic contains following sub-topics:

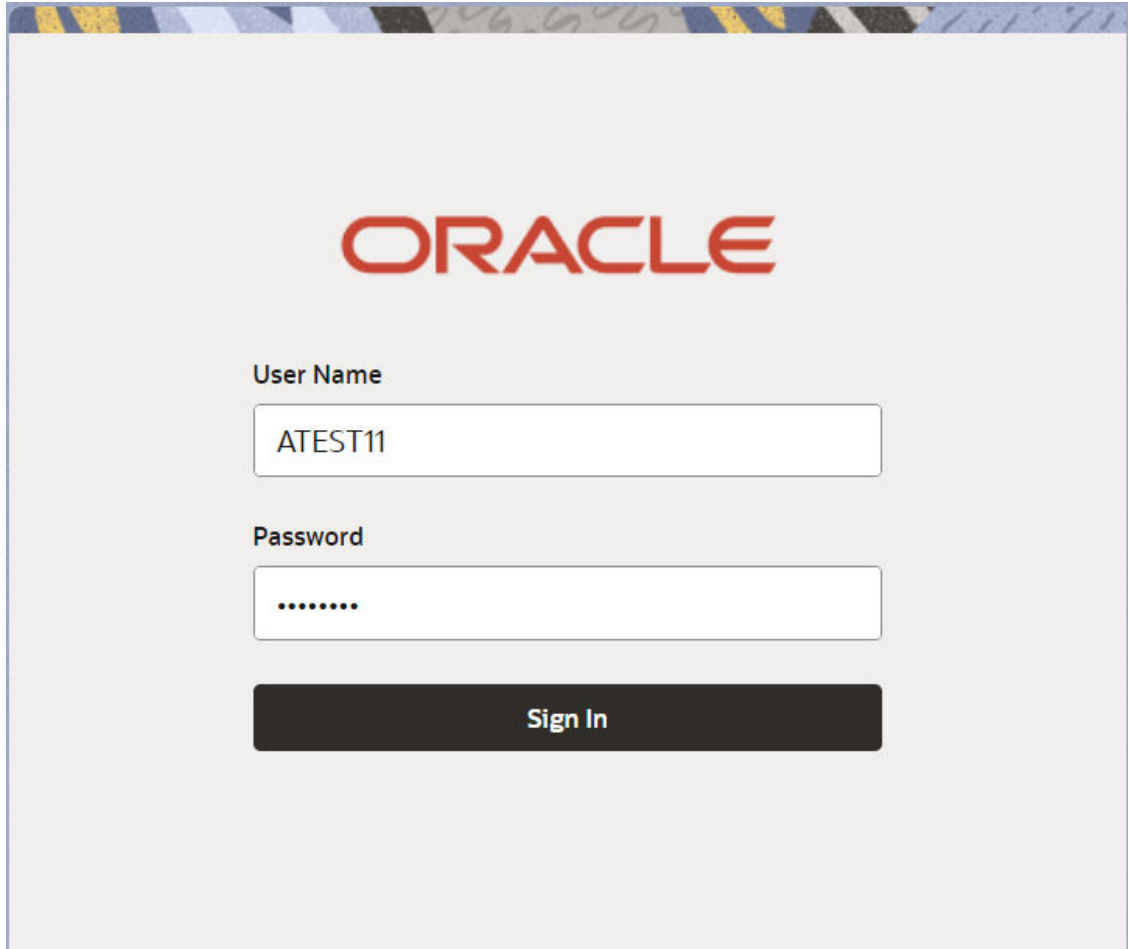
- [SLA Widget - SLA Status Summary](#)
This topic provides the systematic instructions to view **SLA Widget - SLA Status Summary** screen as widget.

1.3.1 SLA Widget - SLA Status Summary

This topic provides the systematic instructions to view **SLA Widget - SLA Status Summary** screen as widget.

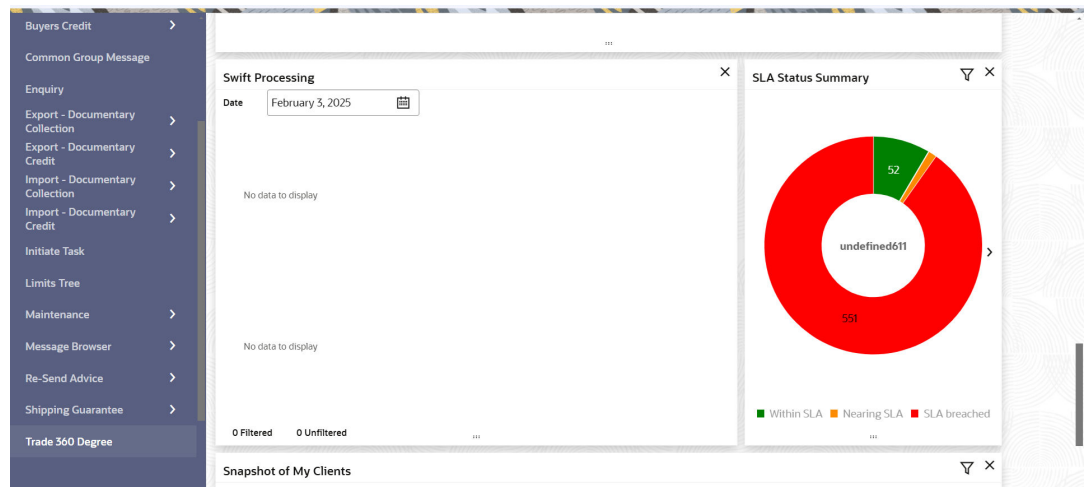
The user can view the SLA Widget - SLA Status Summary in the form of widget on the Dashboard of Oracle Banking Trade Finance Process Management application.

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



1. On login, user can view the SLA Widget on the dashboard screen mapped to the user.

Figure 1-5 SLA Widget - SLA Status Summary




2. Click the  icon on top corner of the Widget.
The **Filter By** screen displays.

Figure 1-6 Filter By

- On **Filter By** screen, specify the fields.

 **Note:**

The fields which are marked as **Required** are mandatory.

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

Table 1-7 Filter By - Field Description

Field	Description
Customer Number	Specify the customer number or click Search icon to search and select the customer number.
Branch	Select the branch code and name..
Process Name	Select the process name.
From Date	System defaults the current date as the branch date, user can enter a back date.
To Date	To date defaults as the branch date
Status	Select the SLA status from the drop-down list. The values are: <ul style="list-style-type: none"> • Within SLA • Near Breach • Breached.

- Click **Filter** to view the SLA status summary based on filter criteria.

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

Table 1-8 Filter By - Action Buttons - Field Description

Field	Description
Filter	Click Filter to view the SLA status summary based on filter criteria.
Clear	Click Clear to clear the filter criteria.

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