

# Oracle® Banking Cash Management Cloud Service

## Oracle Banking Getting Started User Guide



Release 14.8.1.0.0

G45734-01

October 2025

ORACLE®

Copyright © 2023, 2025, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

## Preface

---

Purpose	i
Audience	i
Documentation Accessibility	i
Diversity and Inclusion	i
Related Resources	ii
Conventions	ii
Screenshot Disclaimer	ii

## 1 Access Application

---

1.1 Sign In	1
1.2 Sign Out	2

## 2 Application Environment

---

## 3 How to's

---

3.1 View the Records	2
3.1.1 Tile View	2
3.1.2 Tile View with Context Menu	2
3.1.3 List View	4
3.2 Search the Records	4
3.3 Access the Records	6
3.4 Refresh the Records	6
3.5 Create / Configure the Records	6
3.6 Copy the Records	7
3.7 Unlock the Records	8
3.8 Reopen the Records	8
3.9 Delete the Records	8
3.10 Print the Records	8
3.11 Authorize the Records	9
3.12 Minimize and Maximize the Records	11

3.13	Close the Records	11
3.14	Audit the Records	11

## 4 Screen / Dashboard

---

4.1	Pagination	1
4.2	Mandatory and Optional Fields	1
4.3	Remove Tile	1
4.4	Reorder Tile	1
4.5	Expand Tile	2
4.6	Add Tile	2

## 5 Common Fields

---

## 6 Common Buttons/Icons

---

## Index

---

# Preface

- [Purpose](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)
- [Screenshot Disclaimer](#)

## 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.

## Audience

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

## 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 customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## 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.

## Related Resources

The related documents are as follows:

- Oracle Banking Common Core User Guide
- Oracle Banking Security Management System User Guide
- Collections User Guide
- Cashflow Forecasting User Guide
- Receivables and Payables User Guide
- Netting User Guide

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Screenshot Disclaimer

Information used in the interface or documents are dummy, it does not exist in real world, and its only for reference purpose.

# 1

## 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**.

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

### 1.1 Sign In

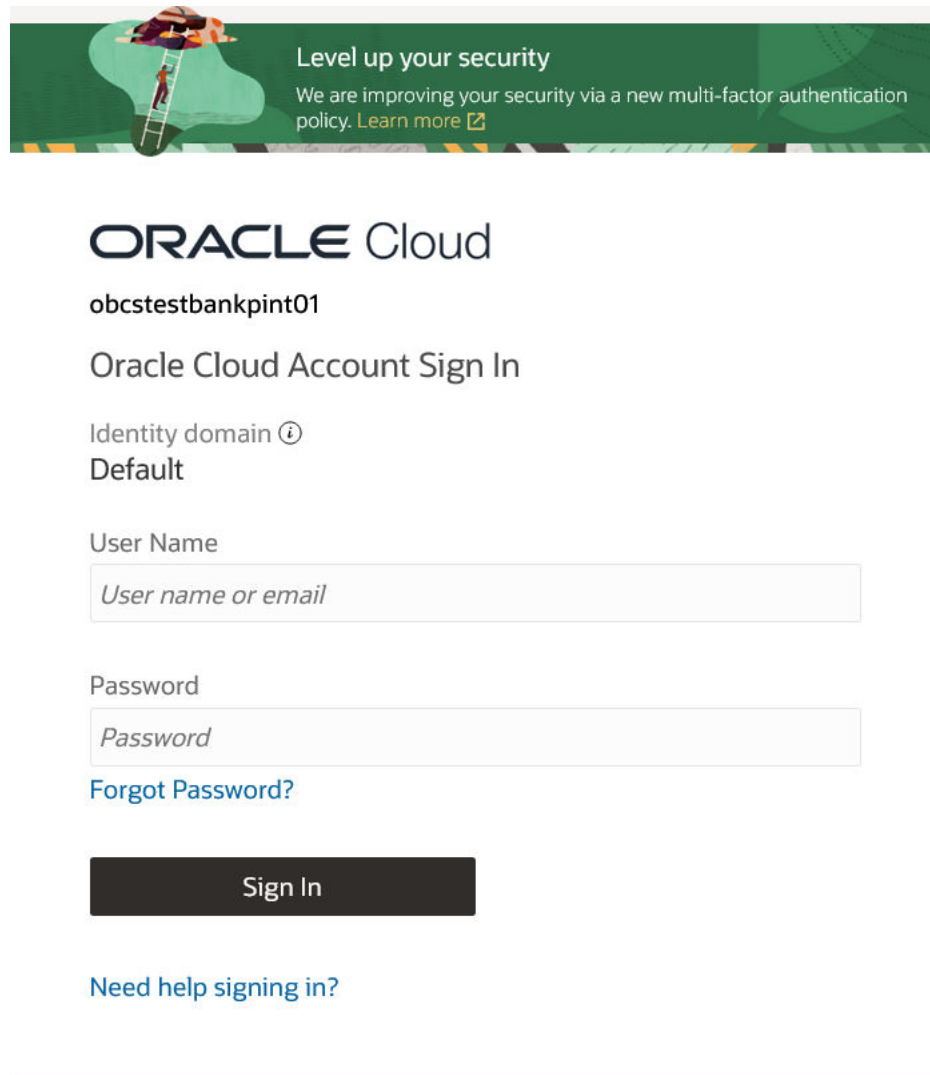
This topic describes the systematic instruction to sign in to the application.

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

1. Specify the URL in the browser address and press **Enter**.

The **Sign In** screen displays.

Figure 1-1 Sign In



Level up your security  
We are improving your security via a new multi-factor authentication policy. [Learn more](#)

**ORACLE** Cloud

obctestbankpint01

Oracle Cloud Account Sign In

Identity domain ⓘ  
Default

User Name

Password

[Forgot Password?](#)

**Sign In**

[Need help signing 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

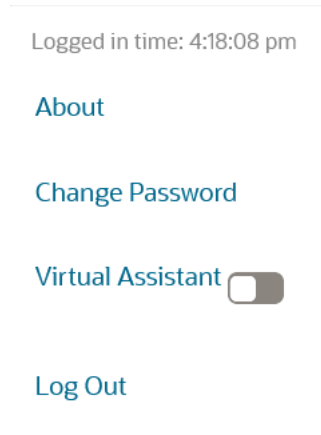
This topic describes the systematic instruction to log out from the application.

Make sure that all the fields are entered and saved.



1. In the selected application, navigate to toolbar.
2. From toolbar, click on the 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.

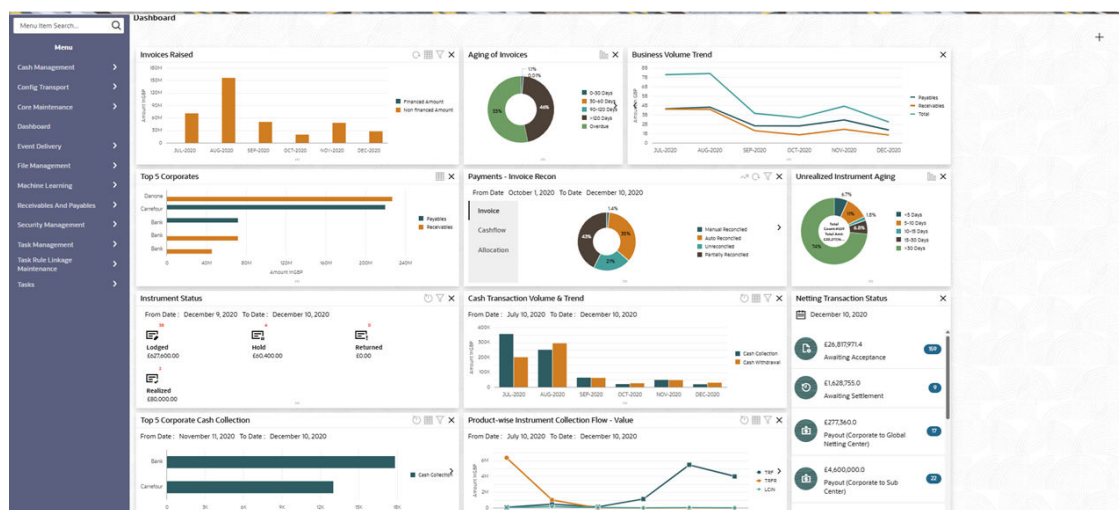
# 2

## 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 2-1 Application Environment**



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

**Table 2-1 Application Environment – Field Description**

Field	Description
<b>Hamburger Menu</b>	Click to expand/collapse the menu.
<b>Menu</b>	Click to navigate/open the screens associated with the application.
<b>Sub-Menu</b>	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
<b>Display Grid</b>	Displays the screens/dashboards.
<b>Bank Name</b>	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.

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

Field	Description
<b>Application Date</b>	Displays the last performed application date of branch's EOD.
<b>User Profile</b>	Displays the user profile related options and actions.

# 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.

- [View the Records](#)  
This topic describes about the various formats to view the records.
- [Search the Records](#)  
This topic describes the systematic instruction to search the records.
- [Access the Records](#)  
This topic describes the systematic instruction to access the records.
- [Refresh the Records](#)  
This topic describes the systematic instruction to refresh the records.
- [Create / Configure the Records](#)  
This topic describes the systematic instruction to create / configure the records.
- [Copy the Records](#)  
This topic describes the systematic instruction to copy the record.
- [Unlock the Records](#)  
This topic describes the systematic instruction to unlock the record.
- [Reopen the Records](#)  
This topic describes the systematic instruction to reopen the record.
- [Delete the Records](#)  
This topic describes the systematic instruction to delete the record.
- [Print the Records](#)  
This topic describes the systematic instruction to print the record.
- [Authorize the Records](#)  
This topic describes the systematic instruction to authorize the record.
- [Minimize and Maximize the Records](#)  
This topic describes the systematic instruction to minimize and maximize the records.
- [Close the Records](#)  
This topic describes the systematic instruction to close the record.
- [Audit the Records](#)  
This topic describes the systematic instruction to audit the record.

## 3.1 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:

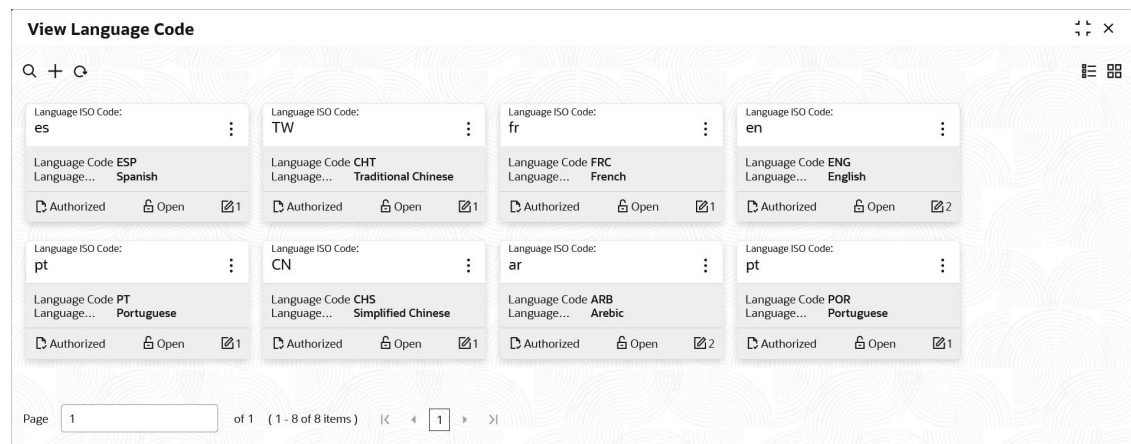
- [Tile View](#)  
This topic describes the information to view the records in tile view.
- [Tile View with Context Menu](#)  
This topic describes the information to view the records in tile view with context menu.
- [List View](#)  
This topic describes the systematic instruction to view the configured records in list format.

### 3.1.1 Tile View

This topic describes the information to view 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**



### 3.1.2 Tile View with Context Menu

This topic describes the information to view the records in tile view with context menu.

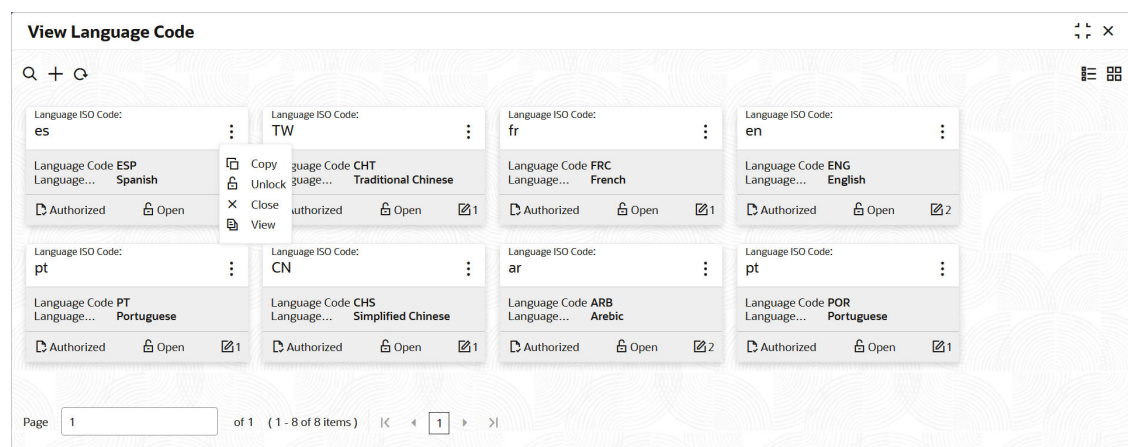
Tile view with context menu is similar to any tile view summary record. The context menu allows the user to perform any actions that are associated with the records.

The content menu is available for:

- View Accounting Role
- View Entry Code

- View Accounting Entries
- View Internal Account Mapping
- View Arrangement Definition
- View Arrangement Decisioning
- View Corporate Enrichment
- View Charge Code
- View Charge Rule
- View Charge Decisioning
- View Charge Preferential Pricing
- View Cash Denomination
- View Courier Setup
- View Location
- View Location Cluster
- View Product Definition
- View Alert Contact Details
- View Alert Definition
- View Alert Decisioning
- View Alert Template Details
- View Alert Template ID
- View Non System Bank Branch Master
- View Non System Bank Master
- View Vault Maintenance
- View Cashflow Code Maintenance
- View Netting Structure

**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**

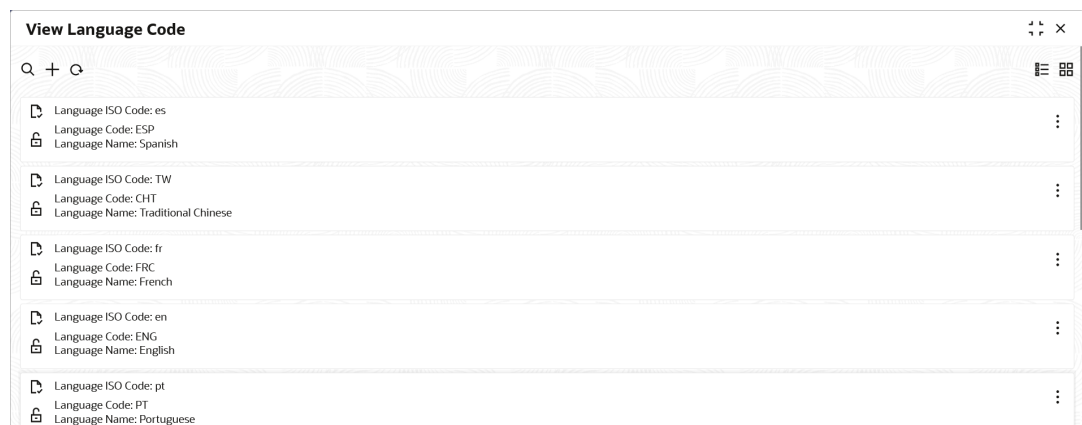
Field	Description
<b>Context Menu</b>	This button appears only to a select the number of screens. The context menu allows the user to perform actions that are associated with the record.
<b>Context Menu Flyout</b>	A list of all actions appears. The list of actions depend on the status of the record.

### 3.1.3 List View

This topic describes the systematic instruction to view the configured records in list format.

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

The **List View** screen displays with the details.

**Figure 3-3 List View**

View Language Code		
Language ISO Code: es	Language Code: ESP	Language Name: Spanish
Language ISO Code: TW	Language Code: CHT	Language Name: Traditional Chinese
Language ISO Code: fr	Language Code: FRC	Language Name: French
Language ISO Code: en	Language Code: ENG	Language Name: English
Language ISO Code: pt	Language Code: PT	Language Name: Portuguese

## 3.2 Search the Records

This topic describes the systematic instruction to search the records.

1. Navigate to **Summary - Maintenance** screen.
2. Click **Search** button.

The fields associated with the screen displays.

Figure 3-4 Search - Maintenance

Search Filter

×

Language Code

Language Name

Authorization Status

Record Status

Search

Reset

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

Table 3-2 Search - Field Description

Field	Description
<Specific Search Parameters>	Specify the applicable search parameters for the respective summary screen.
Authorization Status	Select the authorization status to filter the records. The available options are: <ul style="list-style-type: none"> <li>Authorized</li> <li>Unauthorized</li> <li>Rejected</li> </ul>
Record Status	Select the record status to filter the records. The available options are: <ul style="list-style-type: none"> <li>Open</li> <li>In Progress</li> <li>Closed</li> </ul>

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



## 3.3 Access the Records

This topic describes the systematic instruction to access the records.

The user can access the screens on the permissions/rights provided for the user.

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

1. Navigate to the hamburger menu.

By default, the hamburger menu is expanded.

2. Click <sub-menu>, and click <name of the screen>.

The screens associated with the sub-menu displays.

3. Click Create <name of the screen>.

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

4. Click View <name of the screen>.

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

## 3.4 Refresh the Records

This topic describes the systematic instruction to refresh the records.

1. Navigate to **Summary** screen.

2. Click **Refresh** button.

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

## 3.5 Create / Configure the Records

This topic describes the systematic instruction to create / configure the records.

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

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

The **Create Host Code** screen shown for reference.

**Figure 3-5 Create Host Code**

**Create Host Code**

Host Code Required

Description Required

Country Code Required

Processing Time Zone Required

Default Branch Code Required

Cancel Save

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

The **Save - Confirmation Message** popup screen displays.

**Figure 3-6 Save - Confirmation Message**

**Save**

Please provide remarks (if any)

Remarks

Cancel Confirm

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 [Audit the Records](#) topic for the detailed explanation.
7. Click **Cancel** to discard the changes.

## 3.6 Copy the Records

This topic describes the systematic instruction to copy the record.

1. Navigate to **Summary** 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.

## 3.7 Unlock the Records

This topic describes the systematic instruction to unlock the record.

1. Navigate to **Summary** 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.

## 3.8 Reopen the Records

This topic describes the systematic instruction to reopen the record.

1. Navigate to **Summary** screen.
2. Click on the record that need to reopen.
3. Click **Reopen**.  
The **Confirmation** screen displays.
4. Specify a remark.
5. Click **Confirm** to reopen the record.

## 3.9 Delete the Records

This topic describes the systematic instruction 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 describes the systematic instruction to print the record.

1. 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.

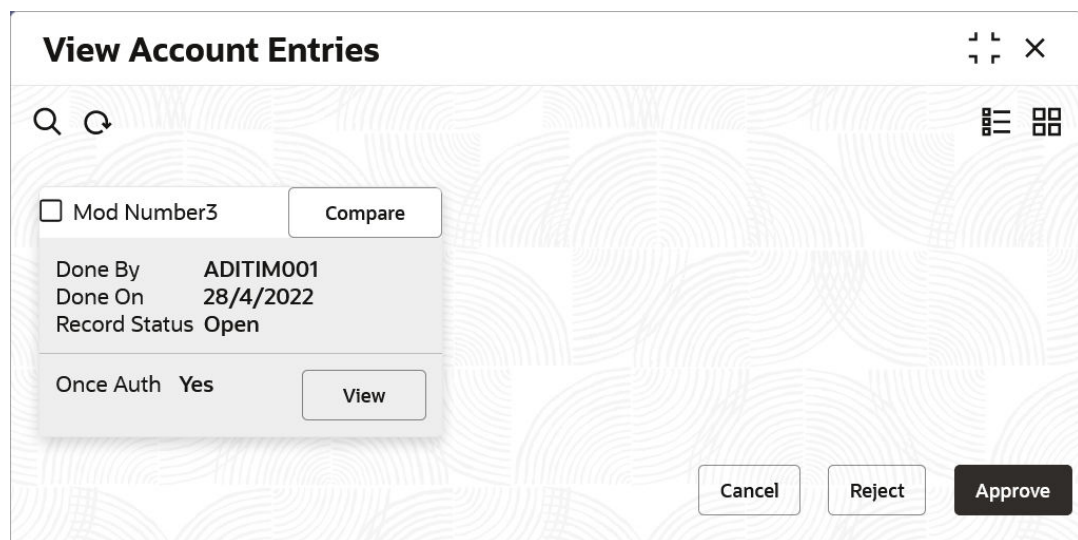
## 3.11 Authorize the Records

This topic describes the systematic instruction to authorize the record.

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 3-7 Authorization**



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.

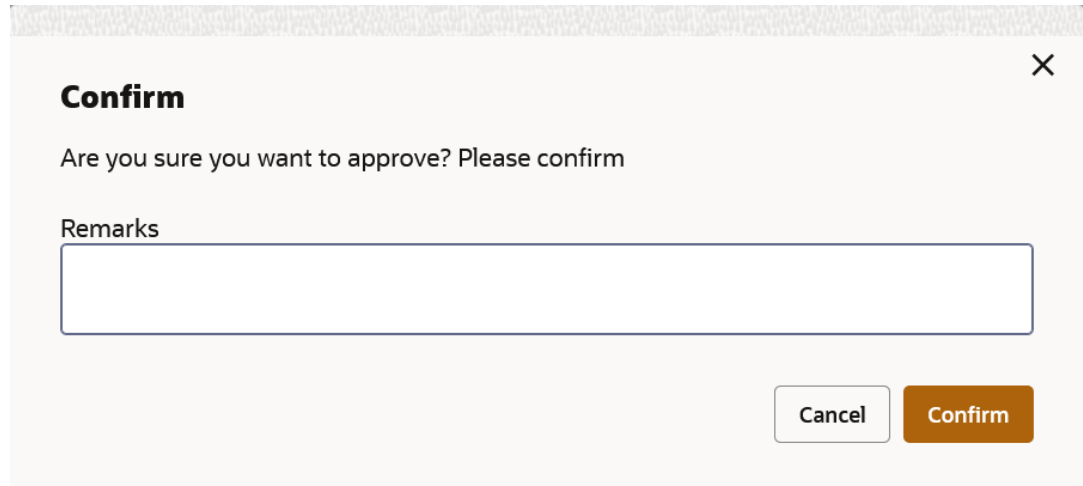
### **Note**

- 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 3-8 Approval Confirmation**

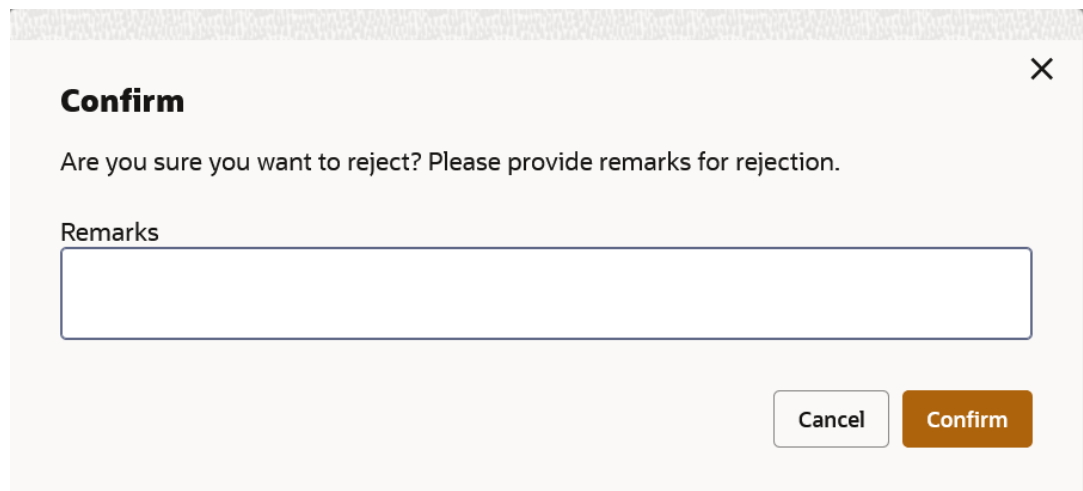
A screenshot of a 'Confirm' dialog box. The title bar is light gray with a close button (X) in the top right corner. The main area has a light gray background. The title 'Confirm' is in bold black text. Below it, the text 'Are you sure you want to approve? Please confirm' is displayed. A text input field labeled 'Remarks' is positioned below the text. At the bottom right, there are two buttons: 'Cancel' (light gray) and 'Confirm' (orange).

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 Records](#) 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 3-9 Rejection Confirmation**

A screenshot of a 'Confirm' dialog box. The title bar is light gray with a close button (X) in the top right corner. The main area has a light gray background. The title 'Confirm' is in bold black text. Below it, the text 'Are you sure you want to reject? Please provide remarks for rejection.' is displayed. A text input field labeled 'Remarks' is positioned below the text. At the bottom right, there are two buttons: 'Cancel' (light gray) and 'Confirm' (orange).

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 [Audit the Records](#) topic for the detailed explanation.

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

## 3.12 Minimize and Maximize the Records

This topic describes the systematic instruction to minimize and maximize the records.

1. Navigate to **Summary** screen.
2. Click **Collapse** to minimize the screen.

The minimized screen displays at the bottom left corner of the screen.

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

The screen is maximized.

## 3.13 Close the Records

This topic describes the systematic instruction to close the record.

1. Navigate to **Summary** 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.

## 3.14 Audit the Records

This topic describes the systematic instruction to audit the record.

1. Navigate to **Summary** screen.
2. Click  icon and click **Unlock** or **View** button to modify/view the record.
3. On **Maintenance** screen, click **Audit** to view the change history of the record.

The **Audit** detail popup screen displays.

Figure 3-10 Audit

Branch Time ZoneUTC

Maker

YUGHM

October 20, 2020 at 7:01:51 AM ⓘ

February 19, 2025 at 7:01:51 AM UTC ⓘ

000

Status

Authorized

Open

Checker

SAVITAM01

December 2, 2020 at 10:23:45 AM ⓘ

March 12, 2025 at 10:23:45 AM UTC ⓘ

000

Modification No

3

Show History

4. 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** popup screen displays in the reverse chronological order.

Figure 3-11 Modification History

Back

Modification No: 3 Authorization Status: Authorized Record Status: Open	Maker: YUGHM Remarks: - Branch: 000 Date Time: Oct 20, 2020, 7:01:51 AM Branch Time Zone: Feb 19, 2025, 7:01:51 AM UTC	Checker: SAVITAM01 Remarks: - Branch: 000 Date Time: Dec 2, 2020, 10:23:45 AM Branch Time Zone: Mar 12, 2025, 10:23:45 AM UTC	29
Modification No: 2 Authorization Status: Authorized Record Status: Open	Maker: YUGHM Remarks: - Branch: 000 Date Time: Oct 20, 2020, 7:01:22 AM Branch Time Zone: Feb 19, 2025, 7:01:22 AM UTC	Checker: SAVITAM01 Remarks: - Branch: 000 Date Time: Dec 2, 2020, 10:23:45 AM Branch Time Zone: Mar 12, 2025, 10:23:45 AM UTC	28
Modification No: 1 Authorization Status: Authorized Record Status: Open	Maker: SHRADDHAJCO1 Remarks: - Branch: 000 Date Time: Oct 20, 2020, 5:54:30 AM Branch Time Zone: Feb 19, 2025, 5:54:30 AM UTC	Checker: SHRADDHAJMO1 Remarks: - Branch: 000 Date Time: Oct 20, 2020, 5:02:08 AM Branch Time Zone: Feb 19, 2025, 5:02:08 AM UTC	

Page 1 of 1 (1-3 of 3 items) < 1 >

5. Click **Back** to navigate to the previous screen.

6. Click anywhere the screen to close the audit detail popup screen.

Oracle Banking Getting Started User Guide  
G45734-01  
Copyright © 2023, 2025, Oracle and/or its affiliates.

October 30, 2025  
Page 12 of 12

# 4

## Screen / Dashboard

This topic describes about the various components in Screen / Dashboard.

- [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 instruction to remove the dashboard tile.
- [Reorder Tile](#)  
This topic describes the systematic instruction to reorder the dashboard tile.
- [Expand Tile](#)  
This topic describes the systematic instruction to expand the dashboard tile.
- [Add Tile](#)  
This topic describes the systematic instruction to add the dashboard tile.

### 4.1 Pagination

This topic describes about the pagination details in the screen.

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

### 4.2 Mandatory and Optional Fields

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

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 instruction to remove the dashboard tile.

- On the **Dashboard** screen, 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 instruction to reorder the dashboard tile.



- Select and drag the **Drag to Reorder** to drop the dashboard widget at the desired place. The page is automatically refreshed and displays the updated order.

## 4.5 Expand Tile

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

- On the **Dashboard** 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.

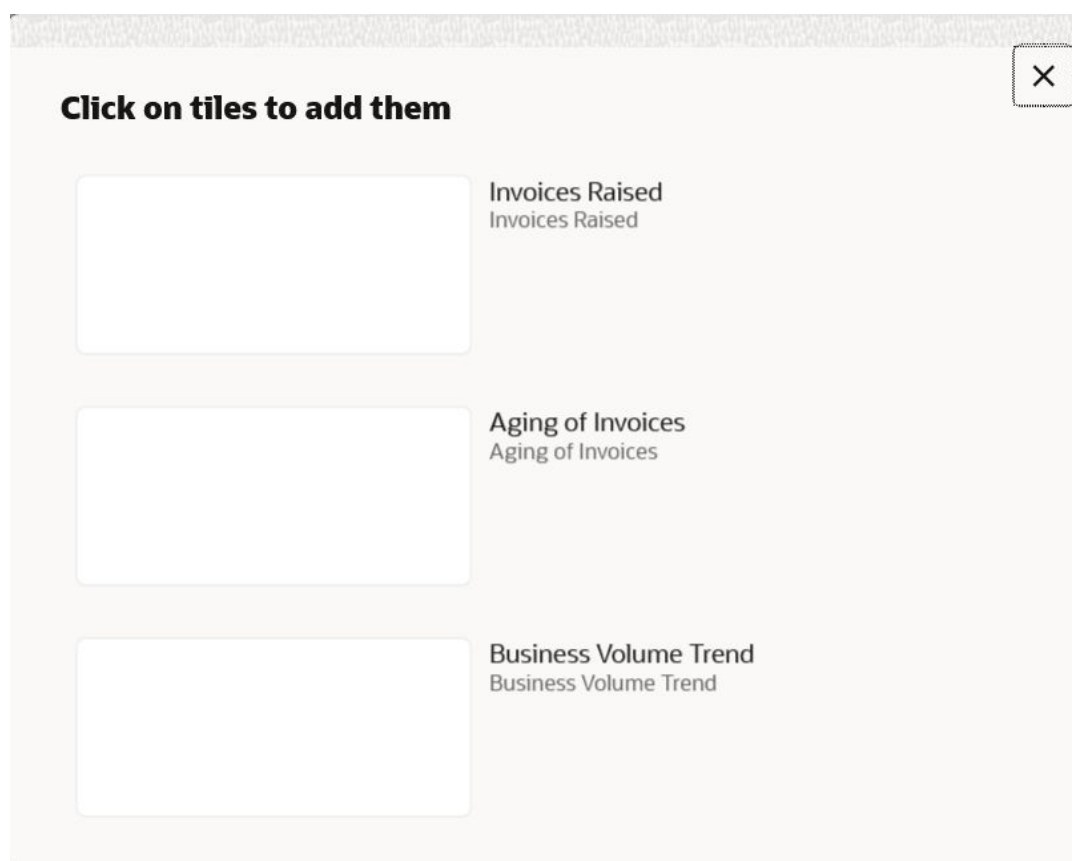
## 4.6 Add Tile

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

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 4-1 Click on tiles to add them**



2. Click on the dashboard that the user wants to add to the dashboard-landing page. The page is automatically refreshed and displays the added dashboard widget.

# 5

## Common Fields

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

The list of common fields are described as follows.

**Table 5-1 Common Fields**

Field	Description
<b>Branch Code</b>	The user can select a configured branch code which the user wants to associate with the selected screen.
<b>Maker</b>	Displays the name of the logged in user who created the record.
<b>Customer Number</b>	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.
<b>Account Number</b>	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.
<b>Source System</b>	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.
<b>Host Code</b>	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.
<b>Currency</b>	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.
<b>Status</b>	Displays the status of the record. <ul style="list-style-type: none"><li>• <b>Authorized:</b> The record is verified and authorized.</li><li>• <b>Unauthorized:</b> The record is not verified.</li><li>• <b>Rejected:</b> The record is rejected.</li><li>• <b>Open:</b> The record is open and waiting for verification.</li><li>• <b>Locked:</b> The record is locked.</li><li>• <b>Closed:</b> The record is closed.</li></ul>

# 6

## 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 6-1 List of Buttons**

Button	Description
<b>New</b>	Creates a new record for the selected screen.
<b>Query</b>	View all the configured records for the selected screen.
<b>Unlock</b>	Unlock the configured record for the selected screen.
<b>Search</b>	Search the configured record and select the required record for the selected screen.
<b>Copy</b>	Copy the configured record, modify the details, and save with a different name for the record.
<b>Delete</b>	Remove the configured record for the selected screen.
<b>Reopen</b>	Reopens a closed record for the selected screen.
<b>Close</b>	Closes the configured record for the selected screen.
<b>Print</b>	Prints the configured record for the selected screen.
<b>Authorize</b>	Authorizes the configured record for the selected screen.
<b>Reject</b>	Rejects the configured record for the selected screen.
<b>Collapse</b>	Minimises the opened screen to the bottom left corner of the screen.
<b>Remove</b>	Closes the opened screen.
<b>Audit</b>	Check the history of the configured records for the selected screen.
<b>Save</b>	Save the configured record for the selected scree
<b>Cancel</b>	Discard the configured record before saving it.

**Table 6-2 Symbols and Icons - Common**






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

Table 6-2 (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 6-3 Symbols and Icons – Audit Details






Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status
	Rejected status

Table 6-4 Symbols and Icons - Widget







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

Table 6-5 Symbols and Icons - Dashboard







Symbol/Icon	Function
	Bar Chart

Table 6-5 (Cont.) Symbols and Icons - Dashboard

Symbol/Icon	Function
	Donut Chart
	Table View
	Filter
	Move Widgets
	Reset

# Index

## A

---

Access Application, [1](#)  
Access the Records, [6](#)  
Add Tile, [2](#)  
Application Environment, [1](#)  
Audit the Records, [11](#)  
Authorize the Records, [9](#)

## C

---

Close the Records, [11](#)  
Common Buttons/Icons, [1](#)  
Common Fields, [1](#)  
Copy the Records, [7](#)  
Create / Configure the Records, [6](#)

## D

---

Delete the Records, [8](#)

## E

---

Expand Tile, [2](#)

## H

---

How to's, [1](#)

## L

---

List View, [4](#)

## M

---

Mandatory and Optional Fields, [1](#)

Minimize and Maximize the Records, [11](#)

## P

---

Pagination, [1](#)  
Print the Records, [8](#)

## R

---

Refresh the Records, [6](#)  
Remove Tile, [1](#)  
Reopen the Records, [8](#)  
Reorder Tile, [1](#)

## S

---

Screen / Dashboard, [1](#)  
Search the Records, [4](#)  
Sign In, [1](#)  
Sign Out, [2](#)

## T

---

Tile View, [2](#)  
Tile View with Context Menu, [2](#)

## U

---

Unlock the Records, [8](#)

## V

---

View the Records, [2](#)