Oracle FLEXCUBE Direct Banking

Core Help Desk User Manual
Release 12.0.2.0.0

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Core Help Desk User Manual
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Contents

1. Preface

1.1. Intended Audience

This document is intended for the following audience:

- Customers
- Partners

1.2. 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.

1.3. Access to OFSS Support

https://flexsupp.oracle.com/

1.4. Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual

Transaction Host Integration Matrix provides information on host integration requirements for the transactions covered in the User Manual.

Introduction provides brief information on the overall functionality covered in the User Manual

Chapters post Introduction are dedicated to individual transactions and its details, covered in the User Manual

1.5. Related Information Sources

For more information on Oracle FLEXCUBE Direct Banking Release 12.0.2.0.0, refer to the following documents:

- Oracle FLEXCUBE Direct Banking Licensing Guide

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2. Transaction Host Integration Matrix

Legends

NH	No Host Interface Required.
★	Host Interface to be developed separately.
✔	Pre integrated Host interface available
✘	Pre integrated Host interface not available

Transaction Name	FLEXCUBE UBS	Third Party Host System
Advance search	NH	NH

3. Introduction

The Help Desk user Module allows the Bank administrator to carry out various transactions required on behalf of the customer. The transactions available in help desk user are mainly for advance search and view purpose.

4. Advance Search

Using the Advance Search option the helpdesk user can carry out an advanced search to view the user details and login in the application on behalf of the selected use

Advance Search

Field Description

Field Name	Description
User Type	[Mandatory, Drop-Down]
	Select the type of channel available under the user type from the drop-down list.
	By default, the system displays **Internet** channel.

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Field Name	Description
First Name	[Optional, Drop Down, Alphanumeric, 40] Select the appropriate option from the drop-down list to indicate the position of the full/partial characters being entered in the text box forming first name of the user. The options are: • Starts with • Ends with • Equals • Contains The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field. Type the search string in the adjacent field. **For Example:** If you select the search criteria as **Starts With** and enter **A** in the adjacent field, then the system displays all the customers' first names starting with **A**.
Last Name	[Optional, Drop Down, Alphanumeric,40] Select the appropriate option from the drop-down list to indicate the position of the Full/partial characters being entered in the text box forming last name of the user. The options are: • Starts with • Ends with • Equals • Contains The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field. Type the search string in the adjacent field. **For Example:** If you select the search criteria as **Starts With** and enter **E** in the adjacent field, then the system displays all the customers' last names starting with **E.**

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Field Name	Description
User ID	[Optional, Drop Down, Alphanumeric,18]
	Select the appropriate option from the drop-down list to indicate the position of the
	full/partial characters being entered in the text box forming user ID of the user.
	The options are:
	• Starts with
	• Ends with
	• Equals
	• Contains
	The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field.
	Type the search string in the adjacent field.
	For Example:
	If you select the search criteria as **Starts With** and enter **1** in the adjacent field, then
	the system displays all the user IDs starting with **1.**
Email	[Optional, Drop Down, Alphanumeric,18]
	Select the appropriate option from the drop-down list to indicate the position of the
	full/partial characters being entered in the text box forming E-mail ID of the user.
	The options are:
	• Starts with
	• Ends with
	• Equals
	• Contains
	The search clause helps in enhancing the search criteria by indicating the position of the
	Characters entered in the adjacent field.
	Type the search string in the adjacent field.
	For Example:
	If you select the search criteria as **Starts With** and enter **L** in the adjacent field, then the system displays all the email IDs starting with **L.**

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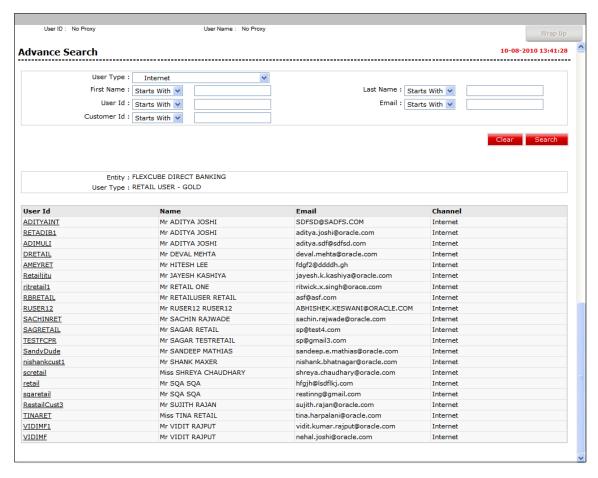| Field Name	Description
Customer Id	[Optional, Drop Down, Alphanumeric,20] Select the appropriate option from the drop-down list to indicate the position of the full/partial characters being entered in the text box forming customer ID of the user. The options are: - Starts with - Ends with - Equals - Contains The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field. Type the search string in the adjacent field. **For Example:** If you select the search criteria as **Starts With** and enter **1** in the adjacent field, then the system displays all the users whose customer ID starts with **1.**

1. Enter the appropriate information in the relevant fields.
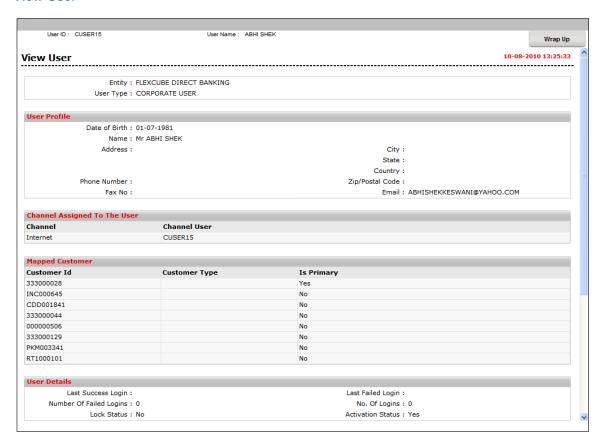2. Click the **Search** button. The system displays the **Advance Search** screen with the search result.

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Advance Search

Advance Search   10-08-2010 13:41:28

User Type : Internet

First Name : Starts With ⌄   Last Name : Starts With ⌄

User Id : Starts With ⌄   Email : Starts With ⌄

Customer Id : Starts With ⌄

Clear   Search

Entity : FLEXCUBE DIRECT BANKING
User Type : RETAIL USER - GOLD

User Id	Name	Email	Channel
ADITYAINT	Mr ADITYA JOSHI	SDFSD@SADFS.COM	Internet
RETADIB1	Mr ADITYA JOSHI	aditya.joshi@oracle.com	Internet
ADIMULI	Mr ADITYA JOSHI	aditya.sdf@sdfsd.com	Internet
DRETAIL	Mr DEVAL MEHTA	deval.mehta@oracle.com	Internet
AMEYRET	Mr HITESH LEE	fdgf2@ddddh.gh	Internet
Retailiitu	Mr JAYESH KASHIYA	jayesh.k.kashiya@oracle.com	Internet
ritretail1	Mr RETAIL ONE	ritwick.x.singh@orace.com	Internet
RBRETAIL	Mr RETAILUSER RETAIL	asf@asf.com	Internet
RUSER12	Mr RUSER12 RUSER12	ABHISHEK.KESWANI@ORACLE.COM	Internet
SACHINRET	Mr SACHIN RAJWADE	sachin.rajwade@oracle.com	Internet
SAGRETAIL	Mr SAGAR RETAIL	sp@test4.com	Internet
TESTFCPR	Mr SAGAR TESTRETAIL	sp@gmail3.com	Internet
SandyDude	Mr SANDEEP MATHIAS	sandeep.e.mathias@oracle.com	Internet
nishankcust1	Mr SHANK MAXER	nishank.bhatnagar@oracle.com	Internet
scretail	Miss SHREYA CHAUDHARY	shreya.chaudhary@oracle.com	Internet
retail	Mr SQA SQA	hfgjh@lsdflkj.com	Internet
sgaretail	Mr SQA SQA	restinng@gmail.com	Internet
RestailCust3	Mr SUJITH RAJAN	sujith.rajan@oracle.com	Internet
TINARET	Miss TINA RETAIL	tina.harpalani@oracle.com	Internet
VIDIMF1	Mr VIDIT RAJPUT	vidit.kumar.rajput@oracle.com	Internet
VIDIMF	Mr VIDIT RAJPUT	nehal.joshi@oracle.com	Internet

3.   Click the appropriate user id in the **User Id** column corresponding to the user. The system displays the View User screen.

View User

4. This will start the session on behalf of the user selected in advanced search.

5. Help desk user will able to access inquiry transactions on behalf of the selected user. Helpdesk user need to click on Wrap Up to close the session.

6. Click the **Wrap Up** button shown at the upper right corner of the above screen. The system displays initial **Advance Search** screen.

Advance Search