

# Oracle FLEXCUBE Direct Banking

Core Help Desk User Manual  
Release 12.0.2.0.0

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**ORACLE®**

Core Help Desk User Manual  
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# 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

## 2. Transaction Host Integration Matrix

### Legends

<b>NH</b>	No Host Interface Required.
<b>★</b>	Host Interface to be developed separately.
<b>✓</b>	Pre integrated Host interface available
<b>×</b>	Pre integrated Host interface not available

<b>Transaction Name</b>	<b>FLEXCUBE UBS</b>	<b>Third Party Host System</b>
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

User ID : No Proxy      User Name : No Proxy      Wrap Up

**Advance Search**      10-08-2010 13:27:53

User Type : Internet

First Name : Starts With [ ]

User Id : Starts With [ ]

Customer Id : Starts With [ ]

Last Name : Starts With [ ]

Email : Starts With [ ]

Clear   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 <b>Internet</b> channel.



Field Name	Description
<b>First Name</b>	<p>[Optional, Drop Down, Alphanumeric, 40]</p> <p>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.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Starts with</li> <li>• Ends with</li> <li>• Equals</li> <li>• Contains</li> </ul> <p>The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field.</p> <p>Type the search string in the adjacent field.</p> <p><b>For Example:</b></p> <p>If you select the search criteria as <b>Starts With</b> and enter <b>A</b> in the adjacent field, then the system displays all the customers' first names starting with <b>A</b>.</p>
<b>Last Name</b>	<p>[Optional, Drop Down, Alphanumeric,40]</p> <p>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.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Starts with</li> <li>• Ends with</li> <li>• Equals</li> <li>• Contains</li> </ul> <p>The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field.</p> <p>Type the search string in the adjacent field.</p> <p><b>For Example:</b></p> <p>If you select the search criteria as <b>Starts With</b> and enter <b>E</b> in the adjacent field, then the system displays all the customers' last names starting with <b>E</b>.</p>

Field Name	Description
<b>User ID</b>	<p>[Optional, Drop Down, Alphanumeric,18]</p> <p>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.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Starts with</li> <li>• Ends with</li> <li>• Equals</li> <li>• Contains</li> </ul> <p>The search clause helps in enhancing the search criteria by indicating the position of the characters entered in the adjacent field.</p> <p>Type the search string in the adjacent field.</p> <p><b>For Example:</b></p> <p>If you select the search criteria as <b>Starts With</b> and enter <b>1</b> in the adjacent field, then the system displays all the user IDs starting with <b>1</b>.</p>
<b>Email</b>	<p>[Optional, Drop Down, Alphanumeric,18]</p> <p>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.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Starts with</li> <li>• Ends with</li> <li>• Equals</li> <li>• Contains</li> </ul> <p>The search clause helps in enhancing the search criteria by indicating the position of the Characters entered in the adjacent field.</p> <p>Type the search string in the adjacent field.</p> <p><b>For Example:</b></p> <p>If you select the search criteria as <b>Starts With</b> and enter <b>L</b> in the adjacent field, then the system displays all the email IDs starting with <b>L</b>.</p>

Field Name	Description
<b>Customer Id</b>	<p data-bbox="464 268 943 296">[Optional, Drop Down, Alphanumeric,20]</p> <p data-bbox="464 310 1256 373">Select the appropriate option from the drop-down list to indicate the position of the</p> <p data-bbox="464 388 1273 451">full/partial characters being entered in the text box forming customer ID of the user.</p> <p data-bbox="464 466 659 493">The options are:</p> <ul data-bbox="464 508 623 682" style="list-style-type: none"> <li data-bbox="464 508 623 535">• Starts with</li> <li data-bbox="464 550 623 577">• Ends with</li> <li data-bbox="464 592 581 619">• Equals</li> <li data-bbox="464 634 607 661">• Contains</li> </ul> <p data-bbox="464 697 1284 760">The search clause helps in enhancing the search criteria by indicating the position of the</p> <p data-bbox="464 774 932 802">characters entered in the adjacent field.</p> <p data-bbox="464 816 971 844">Type the search string in the adjacent field.</p> <p data-bbox="464 858 634 886"><b>For Example:</b></p> <p data-bbox="464 921 1279 1012">If you select the search criteria as <b>Starts With</b> and enter <b>1</b> in the adjacent field, then the system displays all the users whose customer ID starts with <b>1</b>.</p>

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.

## Advance Search

User ID : No Proxy      User Name : No Proxy      Wrap Up

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

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User Type :  ▼

First Name :  ▼

User Id :  ▼

Customer Id :  ▼

---

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

User Id	Name	Email	Channel
<a href="#">ADITYAINT</a>	Mr ADITYA JOSHI	SDFSD@SADFS.COM	Internet
<a href="#">RETADIB1</a>	Mr ADITYA JOSHI	aditya.joshi@oracle.com	Internet
<a href="#">ADIMULI</a>	Mr ADITYA JOSHI	aditya.sdf@sdfs.com	Internet
<a href="#">DRETAIL</a>	Mr DEVAL MEHTA	deval.mehta@oracle.com	Internet
<a href="#">AMEYRET</a>	Mr HITESH LEE	fdgf2@dddgh.gh	Internet
<a href="#">Retailiitu</a>	Mr JAYESH KASHIYA	jayesh.k.kashiya@oracle.com	Internet
<a href="#">ritetail1</a>	Mr RETAIL ONE	ritwick.x.singh@orace.com	Internet
<a href="#">RBRETAIL</a>	Mr RETAILUSER RETAIL	asf@asf.com	Internet
<a href="#">RUSER12</a>	Mr RUSER12 RUSER12	ABHISHEK.KESWANI@ORACLE.COM	Internet
<a href="#">SACHINRET</a>	Mr SACHIN RAJWADE	sachin.rajwade@oracle.com	Internet
<a href="#">SAGRETAIL</a>	Mr SAGAR RETAIL	sp@test4.com	Internet
<a href="#">TESTFCPR</a>	Mr SAGAR TESTRETAIL	sp@gmail3.com	Internet
<a href="#">SandyDude</a>	Mr SANDEEP MATHIAS	sandeep.e.mathias@oracle.com	Internet
<a href="#">nishankcust1</a>	Mr SHANK MAXER	nishank.bhatnagar@oracle.com	Internet
<a href="#">scretail</a>	Miss SHREYA CHAUDHARY	shreya.chaudhary@oracle.com	Internet
<a href="#">retail</a>	Mr SQA SQA	hfgjh@lsdfkj.com	Internet
<a href="#">sqaretail</a>	Mr SQA SQA	restinng@gmail.com	Internet
<a href="#">RestailCust3</a>	Mr SUJITH RAJAN	sujith.rajana@oracle.com	Internet
<a href="#">TINARET</a>	Miss TINA RETAIL	tina.harpalani@oracle.com	Internet
<a href="#">VIDIMF1</a>	Mr VIDIT RAJPUT	vidit.kumar.rajput@oracle.com	Internet
<a href="#">VIDIMF</a>	Mr VIDIT RAJPUT	nehal.joshi@oracle.com	Internet

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

## View User

User ID : CUSER15
User Name : ABHI SHEK
Wrap Up

---

### View User

10-08-2010 13:25:33

Entity : FLEXCUBE DIRECT BANKING  
User Type : CORPORATE USER

#### User Profile

Date of Birth : 01-07-1981  
Name : Mr ABHI SHEK  
Address :  
City :  
State :  
Country :  
Phone Number :  
Fax No :  
Zip/Postal Code :  
Email : ABHISHEKESWANI@YAHOO.COM

#### Channel Assigned To The User

Channel	Channel User
Internet	CUSER15

#### Mapped Customer

Customer Id	Customer Type	Is Primary
333000028		Yes
INC000645		No
CDD001841		No
333000044		No
000000506		No
333000129		No
PKM003341		No
RT1000101		No

#### User Details

Last Success Login :	Last Failed Login :
Number Of Failed Logins : 0	No. Of Logins : 0
Lock Status : No	Activation Status : Yes

4. This will start the session on behalf of the user selected in advanced search.
5. Help desk user will be able to access inquiry transactions on behalf of the selected user. Helpdesk user needs 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

User ID : No Proxy
User Name : No Proxy
Wrap Up

---

### Advance Search

10-08-2010 13:27:53

User Type : Internet ▼

First Name : Starts With ▼

User Id : Starts With ▼

Customer Id : Starts With ▼

Last Name : Starts With ▼

Email : Starts With ▼

Clear
Search