Oracle FLEXCUBE Direct Banking
Release 12.0.0
Help Desk User Manual

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FINANCIAL SERVICES

Part No. E52305-01

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1. Transaction Host Integration Matrix

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

2. 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.

3. 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.

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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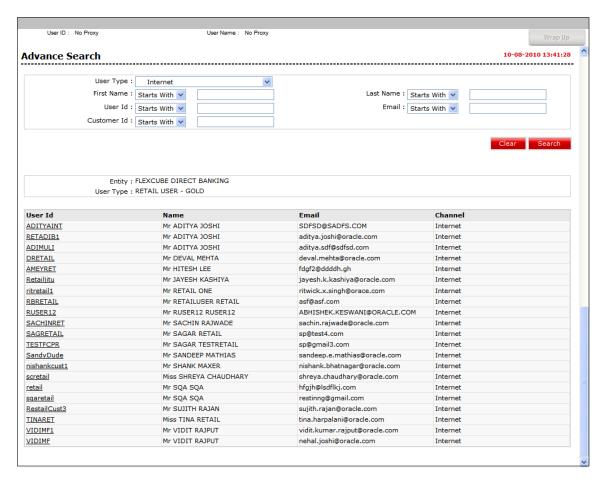| Field Name	Description
Customer Id	[Optional, Drop Down, Alphanumeric,20] Select the appropriate option from the drop-down list to indicate the position of the full/partial characters being entered in the text box forming customer ID of the user. The options are: • Starts with • Ends with • Equals • 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.
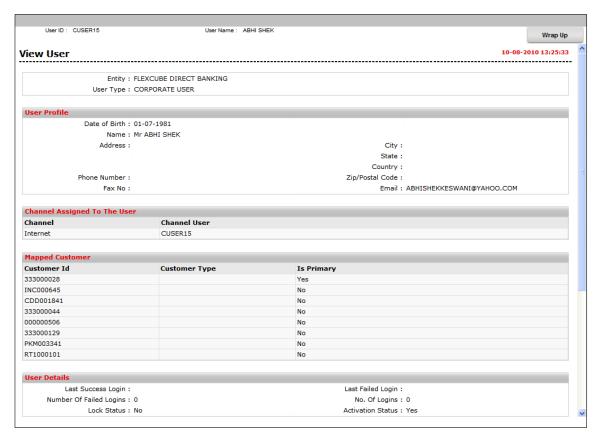2. Click the **Search** button. The system displays the **Advance Search** screen with the search result.

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Advance Search

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

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
Retailjitu	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
sqaretail	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.

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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 :   Zip/Postal Code :
Fax No :   Email : ABHISHEKKESWANI@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 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

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   Last Name : Starts With
User Id : Starts With   Email : Starts With
Customer Id : Starts With

Clear   **Search**

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Oracle FLEXCUBE Direct Banking

User Manual Oracle FLEXCUBE Direct Banking Help Desk User

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Oracle Corporation

World Headquarters

500 Oracle Parkway

Redwood Shores, CA 94065

U.S.A.

Worldwide Inquiries:

Phone: +1.650.506.7000

Fax: +1.650.506.7200

oracle.com

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