

Oracle FLEXCUBE Direct Banking
Release 12.0.0
Dashboard Widgets Customer Services
User Manual



Part No. E52305-01

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1. 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
Recent Transactions	NH	NH
My Transactions	NH	NH
My Approval List	NH	NH
Mails	NH	NH
Last 10 Used Cheques	✓	★
Session Summary	NH	NH
Logged In Users	NH	NH
RSS Feeds	NH	NH

Transaction Host Integration Matrix

Transaction Name	FLEXCUBE UBS	Third Party Host System
Blackout – Next 7 Days	NH	★

2. Introduction - Dashboard Widgets

Widgets are smaller windows which show data in an optimized form.

In a contemporary UI version of FLEXCUBE Direct Banking application, dashboard will have small widgets. These widgets will show minimal data related to main transactions. These widgets will also enable you to initiate transactions with minimal details.

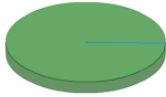
Below **Dashboard** screen shows all the widgets displayed in it, followed by the explanation of each widget.

Dashboard

Blue

Total Position

5,297,316.19 USD
8,938.94 USD



Note:-Balances are consolidated in local currency.

Last Updated On 02:28 AM

Account Balance

00000005910-333-333000028

Current Balance

5,000.00 INR

Available Balance

5,000.00 INR

Uncleared Funds

0.00 INR

Amount on Hold

0.00 INR

Overdraft Limit

0.00 INR

Minimum Balance

100.00 INR

Last Updated On 02:28 AM

My Approval List

No records found

Last Updated on 02:28 AM

My Transactions

Setup Account .. 10-08-2010

Setup Account .. 10-08-2010

Last Updated On 02:28 AM

Recent Transactions

Create Group L.. 10-08-2010

Setup Account .. 10-08-2010

Setup Account .. 10-08-2010

Preferences.. 10-08-2010

Pay Bill.. 10-08-2010

89.00 GBP

Last Updated on 02:28 AM

Loan Rate Inquiry

Preshipment Finance -BC

Financial Lease (L002)

Currency Converter

1 Indian Rupee (INR)
to U.S. Dollar (USD)
Convert

Terms of Use

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**Information displayed above is external to the bank's site.



My Accounts

Current and Savings

Account Description	Current Balance
333000028-ACC LTD	
33300002809-333	2,108.95 GBP
00000005910-333	5,000.00 INR
33300002804-333	2,573,205.67 INR
33300002812-333	46,699.61 INR
33300002813-333	-3,118,743.99 INR
33300002814-333	1,128.09 INR
33300002807-333	549,808 JPY
33300002811-333	1,231.02 USD
33300002815-333	52,697.86 USD
33300002816-333	4,999,493.81 INR

Mini Statement

00000005910-333-333000028

Date Description Amount

03-12-2007 -- 5,000.00 INR C

Note:- C: Credit, D: Debit

Last Updated On 02:28 AM

RSS Feeds

[Weather](#) Current Weather Conditions Across The 48 Contiguous
46 minutes ago
Heat reaches zenith today. For more details...

[Current Weather Conditions Across The 48 Contiguous United St](#)
[Your National Forecast Summary](#)
[Video: Your 3-Day National Weather Forecast](#)

Financial Calendar

August 2010							month
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31	1	2	3	4	
5	6	7	8	9	10	11	

Inward Remittance Inquiry

00000005910-333-333000028

No records found, to search again please amend your inputs

Last Updated On 02:28 AM

Logged In Users

Mr. abhi shu
ABHICORP30
Mr. C USER
CUSER12
Mr. CUSER4 CASH MGMT
CUSER4
Mr. JILL LEE
JILL12
Mr. John Smith
Last Updated On 02:28 AM

Mails

Inbox 1
Compose
Last Updated on 02:28 AM

Funds Transfer

From*
Select
To*
Select
Amount*
Narrative
Initiate
Make an Internal Transfer.

Pay Bill

Select a Biller
Select a Biller
Select Account
Select Account
Bill Number
Bill Number
Bill Date
dd-mm-yyyy (dd-mm-yyyy)
Payment Amount
Payment Amount
Initiate
Click [here](#) to Add New Biller

Last 10 Used Cheques

No Records Found.

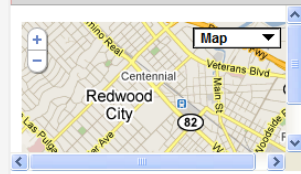
Session Summary

10-08-2010 02:28:00
10-08-2010 01:51:27
10-08-2010 01:47:56
09-08-2010 23:30:01
09-08-2010 23:11:29

Blackout - Next 7 Days

Last Updated on 02:28 AM








Branch Locator






3. Recent Transactions

This widget displays the last 5 performed transactions in a minimalistic form.

Widget – Recent Transactions

Recent Transactions  	
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Setup Account ..	31-03-2011
Last Updated on 13:00 PM 	

1. Last 5 transactions along with their initiation or last updating date are displayed in Recent Transactions widget as shown above.
1. Click any of the displayed transactions. The system displays that transaction in detail in **View Transactions** screen.
2. Click the ,  icons in the widget to refresh and minimize the widget respectively.
3. Click the  icon in the widget. The system displays the **View Transactions** screen.

View Transactions




View Transactions				15-04-2011 13:00:00 GMT +0530
View By Transaction Status				
Initiated Transactions	View Drafts/Templates	Transactions To Authorize	View Transactions	
View Transactions				
Transaction Type	Status	Count		
Attach Documents	Initiated	1		0.3%
Change Users Limits	Accepted	1		0.3%
	Pending for Processing	1		0.3%
Create Group Linkage	Under Process	41		12.35%
	Accepted	43		12.95%
	Error	4		1.2%
Customer Acceptance	Initiated	1		0.3%
Direct Collection	Initiated	1		0.3%
Domestic Funds Transfer	Rejected	2		0.6%
E Statement	Under Process	2		0.6%
	Accepted	1		0.3%
Export Bill Under LC	Initiated	1		0.3%
Export Collection	Initiated	1		0.3%
Forex Deal Booking	Accepted	5		1.51%
Initiate LC	Initiated	1		0.3%
Initiate Outward Guarantee	Initiated	1		0.3%
Internal Account Transfer	Completed	3		0.9%
LC Amendment Initiate	Initiated	1		0.3%
Lookup Maintenance	Initiated	2		0.6%
	Accepted	4		1.2%
Modify Account Structure	Under Process	47		14.16%
	Accepted	1		0.3%
Multiple Internal Transfer	Rejected	2		0.6%
	Completed	2		0.6%
Outward Guarantee Amendment	Initiated	1		0.3%
Own Account Transfer	Rejected	6		1.81%
	Completed	1		0.3%
Setup Account Structure	Under Process	62		18.67%

4. My Transactions

This widget displays the last 5 initiated transactions in a minimalistic form.

Widget – MyTransactions

My Transactions  	
 Lookup Mainten..	31-03-2011
 Lookup Mainten..	31-03-2011
 Lookup Mainten..	31-03-2011
 Export Bill Un..	31-03-2011
	45,433.00 USD
 Direct Collect..	31-03-2011
	5,000,000.00 USD
Last Updated On 13:00 PM 	

1. Last 5 transactions along with their initiation or last updating date are displayed in My Transactions widget as shown above.
2. Click any of the displayed transactions. The system displays that transaction in detail in **View Initiated Transactions** screen.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.
4. Click the  icon in the widget. The system displays the **View Initiated Transactions** screen.

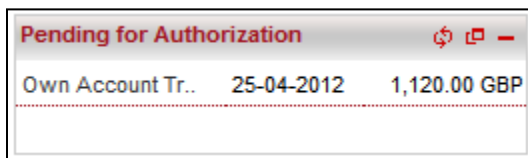
View Initiated Transactions




View Initiated Transactions				15-04-2011 13:00:00 GMT +0530
				View By Transaction Status
Initiated Transactions	View Drafts/Templates	Transactions To Authorize	View Transactions	
Initiated Transactions				
Transaction Type	Status	Count		
Attach Documents	Initiated	1	5.26%	
Customer Acceptance	Initiated	1	5.26%	
Direct Collection	Initiated	1	5.26%	
Export Bill Under LC	Initiated	1	5.26%	
Export Collection	Initiated	1	5.26%	
Initiate LC	Initiated	1	5.26%	
Initiate Outward Guarantee	Initiated	1	5.26%	
LC Amendment Initiate	Initiated	1	5.26%	
Lookup Maintenance	Initiated	2	10.53%	
	Accepted	4	21.05%	
Outward Guarantee Amendment	Initiated	1	5.26%	
Own Account Transfer	Initiated	1	5.26%	
Pay Bill	Initiated	1	5.26%	
Trade Lookup Delete	Accepted	1	5.26%	
Unmark Account as Parent	Accepted	1	5.26%	

5. Pending For Authorization

This widget displays the last few (as configured in the system) transactions waiting for user's approval/authorization.

Widget – Pending For Authorization



1. Last 'n' transactions along with their initiation or last updating date and transaction amount are displayed in Pending For Authorization widget as shown above.
2. Click any of the displayed transactions. The system displays that transaction in detail in **View Pending Authorization Transactions** screen.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.
4. Click the  icon in the widget. The system displays the **View Authorization Transactions** screen.

View Authorization Transactions

View Authorization Transactions

25-04-2012 22:28:30 GMT +0530

View By Transaction Status

Initiated Transactions

View Drafts/Templates

Transactions To Authorize

View Transactions

Transactions To Authorize

Transaction Type	Status	Count
Own Account Transfer	Initiated	1



6. Notifications

This widget displays notifications that are generated for the user. The Notifications widget consists of Alerts, Tasks, Mail Messages, and Bulletins Received.


There are links provided on the subject/title of each Alert, Message and Bulletin. On clicking on a link, the mailbox will be displayed with details of that alert, message or bulletin

Widget – Notifications

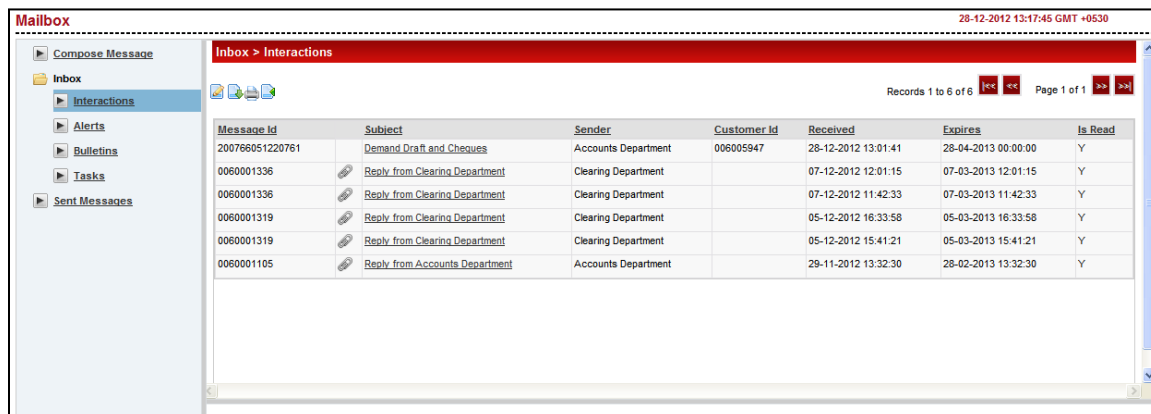


1. Click the **Alerts** tab to view the alerts.
OR
Click the **Messages** tab to view the messages.
2. Click any message subject as highlighted in red border in above screen. The system displays that message in **Mailbox – Interactions** screen.
OR
Click the ,  icons to refresh and minimize the widget respectively.

OR

Click the  icon. The system displays enlarged Mailbox screen as shown below.

Mailbox



The screenshot shows the Mailbox interface with a sidebar on the left containing links for Compose Message, Inbox, Interactions, Alerts, Bulletins, Tasks, and Sent Messages. The main area displays a table of interactions under the heading 'Inbox > Interactions'. The table has columns for Message Id, Subject, Sender, Customer Id, Received, Expires, and Is Read. There are 6 records displayed, showing various messages from the Accounts Department and Clearing Department.










Message Id	Subject	Sender	Customer Id	Received	Expires	Is Read
200766051220761	Demand Draft and Cheques	Accounts Department	006005947	28-12-2012 13:01:41	28-04-2013 00:00:00	Y
0060001336	Reply from Clearing Department	Clearing Department		07-12-2012 12:01:15	07-03-2013 12:01:15	Y
0060001336	Reply from Clearing Department	Clearing Department		07-12-2012 11:42:33	07-03-2013 11:42:33	Y
0060001319	Reply from Clearing Department	Clearing Department		05-12-2012 16:33:58	05-03-2013 16:33:58	Y
0060001319	Reply from Clearing Department	Clearing Department		05-12-2012 15:41:21	05-03-2013 15:41:21	Y
0060001105	Reply from Accounts Department	Accounts Department		29-11-2012 13:32:30	28-02-2013 13:32:30	Y


3. You can compose any new message or view received/sent messages from this screen.
4. Refer **Mailbox** section in **User Manual Oracle FLEXCUBE Direct Banking Retail Customer Services** OR **User Manual Oracle FLEXCUBE Direct Banking Corporate Customer Services** for further details.

7. Last 10 Used Cheques



This widget displays the cheque status inquiry in a minimalistic form. It will display last 10 cheques marked as used across all your accounts.

Widget – Last 10 Used Cheques

Last 10 Used Cheques  		
▼  QT200178104		
 26		100.00 GBP
▼  QT100177402		
 121		500.00 USD
▼  1000000796		
 276		150.00 GBP
Last Updated on 13:00 PM 		

1. Click the Account Number. The system will display cheques under that account which are marked as used. It will also display amount of the cheque with the currency.
2. Click the  icon. The system displays the **Cheque Status Inquiry** screen to enquire about cheque status.

OR

Click the ,  icons to refresh and minimize the widget respectively.

Cheque Status Inquiry

Cheque Status Inquiry

15-04-2011 13:00:00 GMT +0530

The Cheque Status shall be displayed if the Cheque is a valid cheque. Additional information for the Cheque shall be available if the Cheque has been presented to the bank.

Select Account:

Status:

From Date:

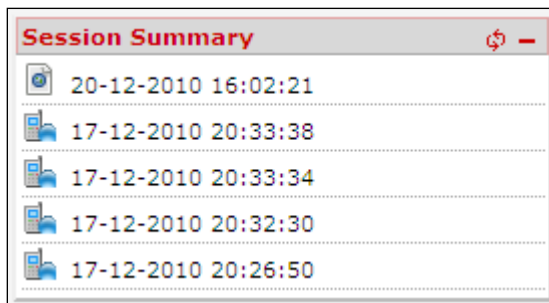
Search By Cheque Number ☐




To Date:

8. Session Summary

This widget displays the session summary in a minimalistic form. This widget displays last 5 login session dates and time when session was started. Session summary will be displayed using preferred time zone of the user.

Widget – Session Summary



1. Click the  icon. The system displays **Session Summary** screen with earlier login details.
OR
Click the ,  icons to refresh and minimize the widget respectively.

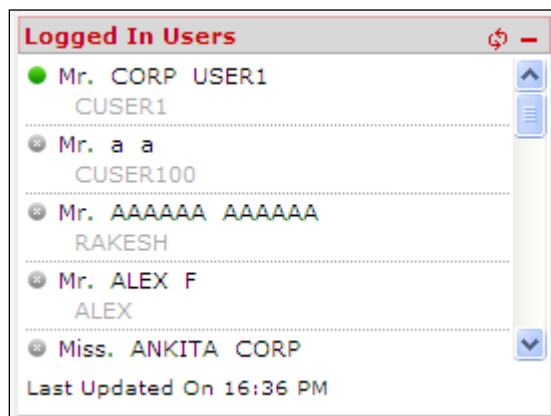
Session Summary



Session Summary			20-12-2010 16:15:38 GMT +0530
Channel User Id	MIRETAIL	Session Start	20-12-2010 16:02:21 GMT +0530
Transaction Name	Status	Transaction Date	
Login (LGN)	Success	20-12-2010 16:02:21 GMT +0530	
Transactions (VAT)	Success	20-12-2010 16:02:41 GMT +0530	
Loan Interest Rates (LIR)	Success	20-12-2010 16:02:42 GMT +0530	
Mailbox (IMS)	Success	20-12-2010 16:02:45 GMT +0530	
Transaction Blackout (TBO)	Success	20-12-2010 16:02:50 GMT +0530	

9. Logged In Users

This widget displays the list of other users having the same customer id. It also displays the logged in status of those users.

Widget – Logged In Users

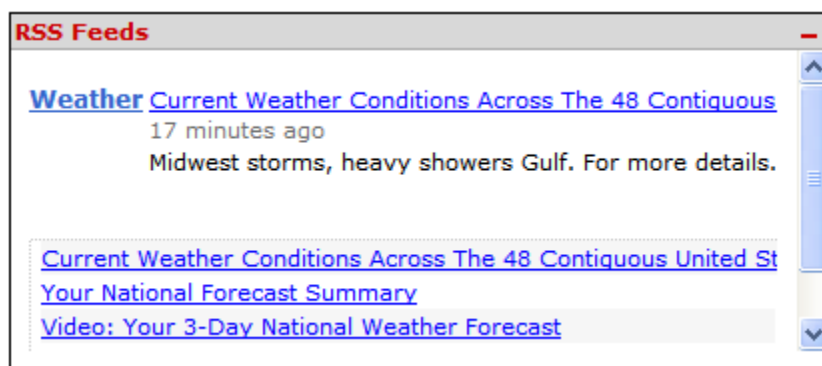



1. Widget displays green icon for logged in user and grey icon for offline users. User name with their user id is also displayed as shown in the above screen.
2. Click the ,  icons to refresh and minimize the widget respectively.

10. RSS Feeds

This widget displays the integrated RSS Feeds. RSS (Real Simple Syndication) is a relatively new and easy way to distribute content via the internet. This widget mainly displays frequently updated works such as blog entries, news headlines, weather forecast etc in a standardized format.

Widget – RSS Feeds

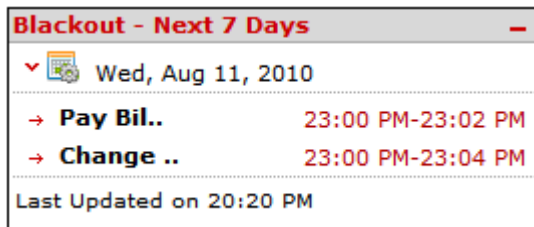


1. Click any of the links. The system will display its contents in a new window.
2. Click the  icon to minimize the widget.

11. Blackout – Next 7 Days

This widget displays blackouts planned for next 7 days. You will not be able to access that transaction for the specified blackout period.

Widget – Blackout – Next 7 Days

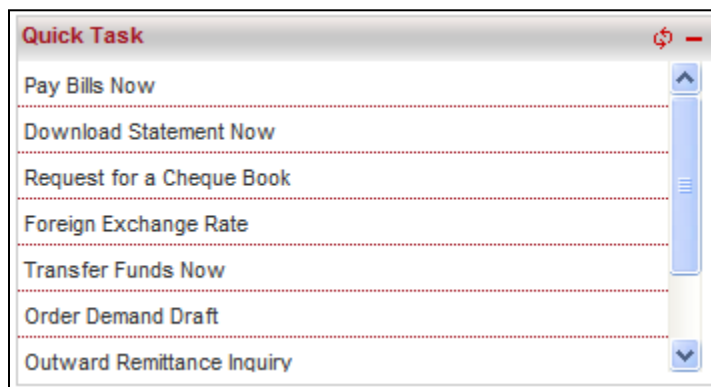




1. Click the ▼ icon. The system displays transaction name for which the blackout has been set and also the time period of the blackout.
2. For e.g. as shown in the above screen, blackout has been set for Pay bill and Change Password transactions. Pay Bills transaction will not be accessible during the period 23.00 PM to 23.02 PM on Aug 11 and Change Password transaction will not be accessible during the period 23.00 PM to 23.04 PM on Aug 11.
1. Click the icon to minimize the widget.

12. Quick Tasks

This widget allows the user to easily access the given transactions without having to navigate through the menu. Transactions to be displayed as Quick Tasks will be predefined. Only those transactions will be displayed in the user's widget for which the user has access.

Widget – Quick Tasks

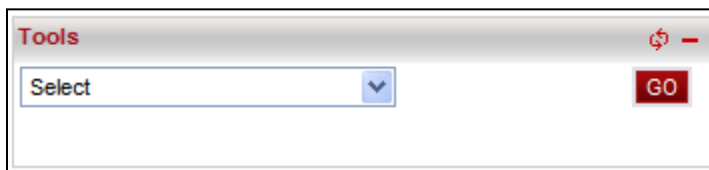




1. Click any of the transaction links. The system opens that transaction in a new window.
2. Click the ,  icons in the widget to refresh and minimize the widget respectively.

13. Tools

This widget allows the user to easily access the tools available in the application without having to navigate through the menu. Transactions to be displayed as Tools will be predefined as per the user type combination. Only those transactions will be displayed in the user's widget for which the user has transaction access.

Widget – Tools



1. Select any tools/transaction from the dropdown.
2. Click the **GO** button. The system displays selected transaction in a new window.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.

14. Request Status

This widget will display, in the case of Retail Users, latest status of service requests initiated by the user. In the case of Corporate Users, this widget will display status updations of all service requests initiated by users belonging to the customer ID, to which the user has view access as per mandates set. Hence, status updations of service requests as available in the, 'View Transactions' screen of User Authorisations dashboard will be displayed in the Corporate User's dashboard.

Widget – Request Status

Request Status		
Reference No	Service Requested	Status
132947997235690	Credit Card Ho..	Closed
759174437235728	Account Closur..	Pending
595121563165371	Activate Credi..	Pending

Field Description

Field Name	Description
------------	-------------

Field Name	Description
Reference No	[Display] This column displays the ID of the request generated by the system at the time of request initiation.
Service Requested	[Display] This column displays the type of request.
Status	[Display] This column displays the current status of the service request.

- Click on any of the transaction in Service Requested column. The system will display that transaction In View Initiated Transactions screen as shown below.

View Initiated Transactions

View Initiated Transactions

25-04-2012 21:08:05 GMT +0530

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
759174437235728	Account Closure	10-04-2012 12:19:27	SAILRETAIL	10-04-2012 12:19:27	Pending [60]	1		

Account: 7853448779422
Balance: 27000.000000
Reason: Migrating to another country

Note:

Audit Detail

Authorizer/s	Authorized On	Status	Value Date	Amount	Note
SAILRETAIL	10-04-2012 12:19:27	Pending [60]			0
SAILRETAIL	10-04-2012 12:19:27	Authorized [3]			0

- Click the , icons in the widget to refresh and minimize the widget respectively.
- Click icon. The system displays **View Initiated Transaction** screen as shown below.

View Initiated Transactions

View Initiated Transactions 25-04-2012 21:18:28 GMT +0530

View By Transaction Status

Initiated Transactions **View Drafts/Templates**

Transaction Type	Status	Count	
Amend Term Deposit	Accepted	4	6.78%
	Rejected	8	13.56%
Demand Draft-Pay Order Request	Accepted	2	3.39%
International Account Transfer	Rejected	1	1.69%
International Transfer Beneficiary	Accepted	1	1.69%
Multiple Internal Transfer	Rejected	4	6.78%
	Under Process	1	1.69%
Open Term Deposit	Rejected	12	20.34%
	Accepted	6	10.17%
Own Account Transfer	Rejected	6	10.17%
	Completed	3	5.08%
	Under Process	1	1.69%
Pay Bill	Rejected	1	1.69%
	Under Process	1	1.69%
Redeem Term Deposit	Rejected	3	5.08%
	Accepted	3	5.08%
Standing Instruction Cancellation	Rejected	1	1.69%
Stop Or Unblock Cheque Request	Rejected	1	1.69%

15. Foreign Exchange Deals

This widget will display minimal details of all the foreign exchange deals available to the user. The deals will be grouped by the value date and will be in chronological order.




Widget – Foreign Exchange Deals

Foreign Exchange Deals						
Customer Id	Buy Currency- Sell Currency	Value Date	Deal Type	Amount	Utilized Amount	Rate
004004370	USD-GBP	13-04-2012	Buy	17,176.00 USD	Nil	1.7176

Field Description

Field Name	Description
Customer ID	[Display] This column displays the Customer id for which the deal is booked.
Buy Currency - SellCurrency	[Display] This column displays the currency pair of the deal.

Field Name	Description
Value Date	[Display] This column displays the Value Date of the deal.
Deal Type	[Display] This column displays the Type of deal - buy or sell.
Amount	[Display] This column displays the Amount of the deal.
Utilized Amount	[Display] This column displays the Amount of the deal that has been utilized along with the currency.
Rate	[Display] This column displays the Rate at which the deal was made.

1. Click the ,  icons in the widget to refresh and minimize the widget respectively.
2. Click  icon. The system displays **View Deal Details** screen as shown below.

View Deal Details

View Deal Details

25-04-2012 23:39:42 GMT +0530

Customer Id: All

Buy Currency: Select

Deal Booking Date From:

Deal Type: Select

Sell Currency: Select

Deal Number:

Value Date:

Search



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Dashboard Widgets Customer Services User Manual
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Hardware and Software

Engineered to Work Together