Oracle FLEXCUBE Direct Banking Release 12.0.1.0.0 Dashboard Widgets Customer Services User Manual



Part No. E52306-01



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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 Activity	NH	NH
My Transactions	NH	NH
Last 10 Used Cheques	✓	*
Session Summary	NH	NH
Logged In Users	NH	NH
RSS Feeds	NH	NH
Blackout - Next 7 Days	NH	*



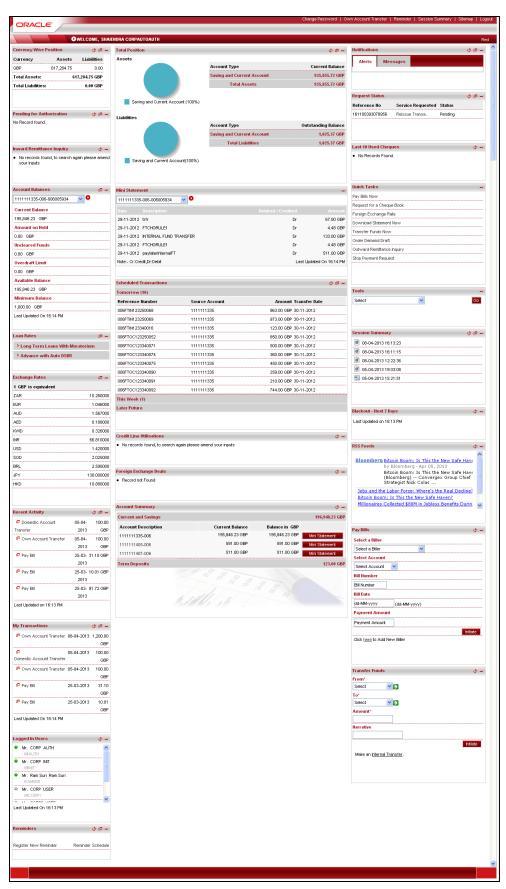
2. Introduction - Dashboard Widgets

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.





3. Recent Activity

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

Widget – Recent Transactions

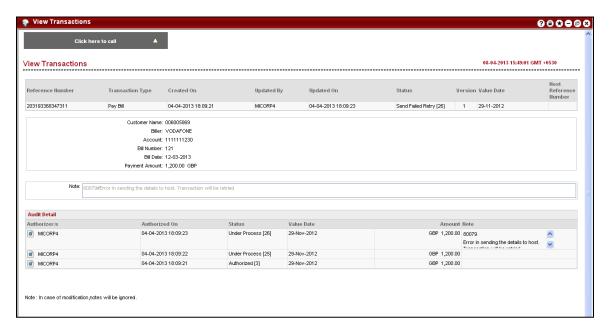


1. Last 5 transactions along with their initiation or last updating date are displayed in Recent Transactions widget as shown above.



- 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





4. My Transactions

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

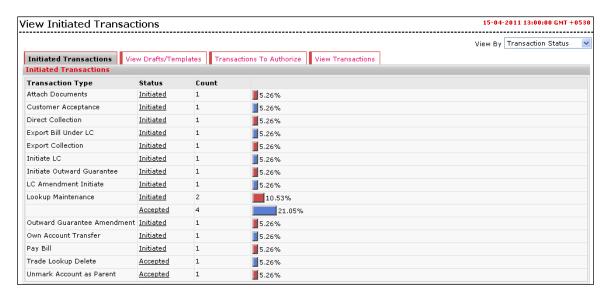
Widget - MyTransactions



- 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 cion in the widget. The system displays the **View Initiated Transactions** screen.



View Initiated Transactions





5. Pending For Authorization

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

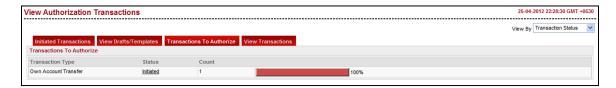
Widget - Pending For Authorization



- 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





6. 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



- 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.
- Click the circle icon. The system displays the Cheque Status Inquiry screen to enquire about cheque status.
 OR
 - Click the , Licons to refresh and minimize the widget respectively.



Cheque Status Inquiry





7. 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 , Licons to refresh and minimize the widget respectively.



Session Summary

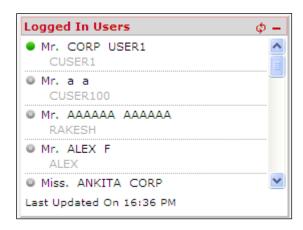
Session Summary			20-12-2010 16:15:38 GMT +05:
Channel User Id	MIRETAIL	Session Start	20-12-2010 16:02:21 GMT +0530
Transaction Name	Status		Transaction Date
Login (LGN)	Success		20-12-2010 16:02:21 GMT +0530
Transactions (VAT)	Success		20-12-2010 16:02:41 GMT +0530
Loan Interest Rates (LIR)	Success		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



8. 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.



9. 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.



10. Blackout - Next 7 Days

This widget displays blackouts planned for next 7 days. You will not 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.
- 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.



11. Notifications

This widget displays notifications that are generated for the user. The Notifications widget consist of Alerts, Tasks, Mail Messages, 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 link. The system displays alerts registered for the user as shown below.



Widget - Notifications



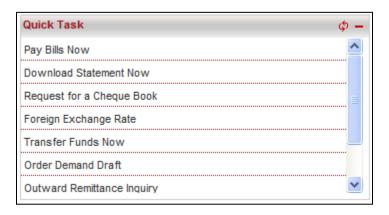
- 2. Similarly Click the Messages link to view the messages.
- 3. Click the , icons in the widget to refresh and minimize the widget respectively.
- 4. Click the icon in the widget. The system displays the **Mailbox** screen.



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



- 5. Click any of the transaction links. The system opens that transaction in a new window.
- 6. 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



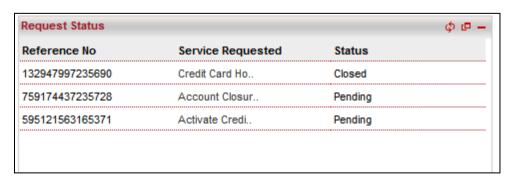
- 1. Select any tools/transaction from the dropdown.
- 2. Click the **GO** button. The system displays selected transaction in a new window.
- 3. Click the , icons in the widget to refresh and minimize the widget respectively.



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



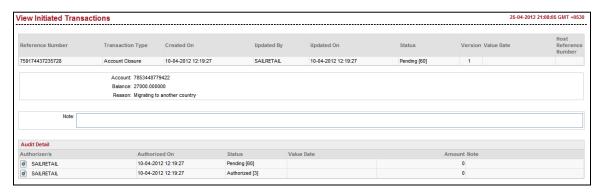
Field Description



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.

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

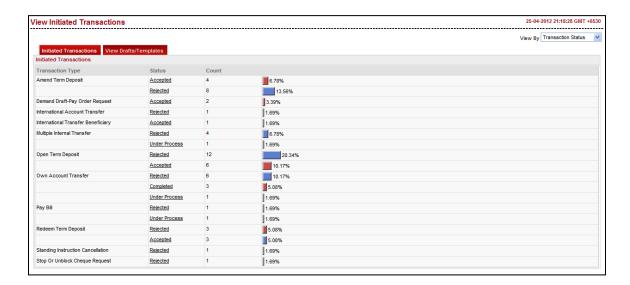
View Initiated Transactions



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



View Initiated Transactions





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



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







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