

# Oracle FLEXCUBE Direct Banking

Dashboard Widgets - Customer Services  
Release 12.0.3.0.0

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**ORACLE®**

Dashboard Widgets Customer Service 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://support.us.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 12.0.3.0.0, refer to the following documents:

- Oracle FLEXCUBE Direct Banking Licensing Guide
- Oracle FLEXCUBE Direct Banking Installation Manuals

## 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>
Recent Transactions	NH	NH
My Transactions	NH	NH
Pending For Authorization	NH	NH
Mails	NH	NH
Last 10 Used Cheques	✓	★
Session Summary	NH	NH
Logged In Users	NH	NH
RSS Feeds	NH	NH
Blackout – Next 7 Days	NH	NH
Notification	NH	NH
Quick Tasks	NH	NH
Tools	NH	NH
Request Status	NH	NH
Foreign Exchange Deals	NH	NH

### 3. 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

The dashboard features a blue header with the Oracle logo and navigation icons. The main content area is divided into several widgets:

- Total Position:** Includes an 'Assets' pie chart showing 'Saving & Current' (80.47%) and 'Term Deposits' (19.53%), and a table of account balances:
 

Account Type	Current Balance
<b>Saving and Current Account</b>	<b>111,247.13 GBP</b>
<b>Term Deposits</b>	<b>27,000.00 GBP</b>
<b>Total Assets</b>	<b>138,247.13 GBP</b>
- Mini Statement:** Shows a list of transactions for a selected account (1040411271039-104-10411271), including dates, amounts, and descriptions like 'NEW DEPOSIT'.
- Account Summary:** Lists 'Current and Savings' (111,247.13 GBP) and 'Term Deposits' (7,000.00 GBP).
- Pay Bills:** Includes fields for 'Select a Biller', 'Select Account', and 'Bill Number'.
- Loan Rates:** Lists options like 'Advance with Auto DSRB', 'Operational', and 'Business Loan'.
- Transfer Funds:** Features 'From\*', 'To\*', and 'Amount\*' dropdown menus for initiating transfers.
- Quick Tasks:** Provides shortcuts for 'Pay Bills Now', 'Download Statement Now', 'Request for a Cheque Book', and 'Transfer Funds Now'.
- Tools:** Offers utilities such as 'Foreign Exchange Calculator', 'ATMs and Branches close to you', 'Limits Query', and 'Budget Calculator'.
- Recent Activity:** A table of recent transactions:
 

Transaction Type	Reference Number	Date	Amount	Currency	Status
Domestic Funds Transfer	188698678698974	06-05-2014	100.00	INR	Initiated
Own Account Transfer	137269231693500	05-05-2014	12.00	GBP	Initiated
Cancel Pending Transfers	793372648684328	05-05-2014	10.00	GBP	Under Process
Domestic Funds Transfer	673537808529374	05-05-2014	100.00	INR	Rejected
Own Account Transfer	427827801644150	05-05-2014	21.00	GBP	Rejected
- My Transactions:** Currently shows 'No records found' and 'Last Updated On 11:12 AM'.
- Reports:** A section indicating 'Report not yet processed'.

The footer contains a 'Dashboard' button, the copyright notice '© Oracle Corporation 2008, 2014', and system status icons.

## 4. Recent Activity


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

### Widget – Recent Transactions

Recent Activity					
Own Account Transfer	792239092968096	29-05-2014	200.000 INR	Accepted	
Open Term Deposit	218576820581088	23-04-2014	3,000.000 INR	Rejected	
Internal Transfer Beneficiary	204096110037748	20-02-2014		Accepted	
Internal Transfer Beneficiary	188051118030940	20-02-2014		Accepted	
Top-up Term Deposit	177864591017803	18-02-2014	2,000.00 GBP	Accepted	
Last Updated on 18:11 PM					

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

### View Transactions

- Click the  icon next to the required transaction in the widget. The system displays the details of the required transaction in the *View Transactions* screen.

View Transactions
04-06-2014 12:47:46 GMT +0530 ? 🏠 ★ 📄 ✕

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
204096110037748	Internal Transfer Beneficiary	20-02-2014 21:29:44 GMT +0530	patret	20-02-2014 21:29:44 GMT +0530	Accepted [5]	1		

Transaction Type: Internal Account Transfer

Beneficiary Id: test1234

Beneficiary Name: testname

Beneficiary Bank Branch\*: 001

Beneficiary Account No.: 001008109031

Beneficiary Email:



Visibility: Public

Note:

**Audit Detail**

Authorizer/s	Authorized On	Status	Value Date	Amount	Note
patret	20-02-2014 21:29:44 GMT +0530	Accepted [5]		--	
patret	20-02-2014 21:29:44 GMT +0530	Under Process [25]		--	
patret	20-02-2014 21:29:44 GMT +0530	Authorized [3]		--	



2. Click the  icon in the widget to refresh the widget.
3. Click the  icon in the widget. The system displays the View Initiated Transactions screen.

### View Initiated Transactions

View Initiated Transactions
04-06-2014 12:50:02 GMT +0530 ? 🖨️ ★ 📄 ✕

View By Transaction Status ▼

Initiated Transactions

View Drafts/Templates

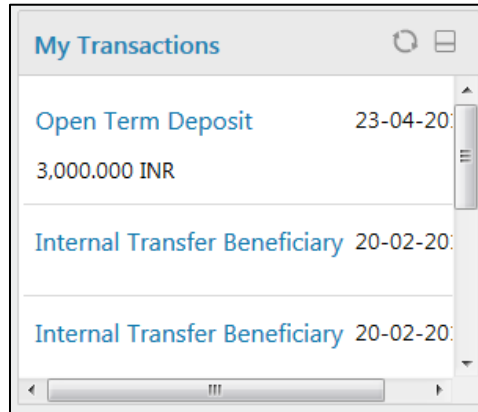
Initiated Transactions

Transaction Type	Status	Count		
Internal Transfer Beneficiary	<u>Accepted</u>	2	<div style="width: 20px; height: 10px; background-color: #c00000;"></div>	28.57%
Open Term Deposit	<u>Rejected</u>	1	<div style="width: 20px; height: 10px; background-color: #0000c0;"></div>	14.29%
Own Account Transfer	<u>Accepted</u>	1	<div style="width: 20px; height: 10px; background-color: #c00000;"></div>	14.29%
Preferences	<u>Accepted</u>	2	<div style="width: 20px; height: 10px; background-color: #0000c0;"></div>	28.57%
Top-up Term Deposit	<u>Accepted</u>	1	<div style="width: 20px; height: 10px; background-color: #c00000;"></div>	14.29%

## 5. My Transactions

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

### Widget – My Transactions



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

1. Click any of the displayed transactions. The system displays that transaction in detail in **View Transactions** screen.

### View Transactions


Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version Value Date	Host Reference Number
204096110037748	Internal Transfer Beneficiary	20-02-2014 21:29:44 GMT +0530	patret	20-02-2014 21:29:44 GMT +0530	Accepted [5]	1	

Transaction Type: Internal Account Transfer

Beneficiary Id: test1234  
 Beneficiary Name: testname  
 Beneficiary Bank Branch\*: 001  
 Beneficiary Account No.: 001008109031  
 Beneficiary Email:  
 Visibility: Public

Note:


Authorizer/s	Authorized On	Status	Value Date	Amount Note
patret	20-02-2014 21:29:44 GMT +0530	Accepted [5]		--
patret	20-02-2014 21:29:44 GMT +0530	Under Process [25]		--
patret	20-02-2014 21:29:44 GMT +0530	Authorized [3]		--

- Click the  icon in the widget. The system displays the *Initiated Transactions* tab in the *View Initiated Transactions* screen.

### View Initiated Transactions

View By: Transaction Status

Transaction Type	Status	Count	Percentage
Internal Transfer Beneficiary	Accepted	2	28.57%
Open Term Deposit	Rejected	1	14.29%
Own Account Transfer	Accepted	1	14.29%
Preferences	Accepted	2	28.57%
Top-up Term Deposit	Accepted	1	14.29%

- Click the  icon in the widget to refresh the widget.

## 6. 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

Transaction Type	Date	Amount	Currency
Own Account Transfer	24-04-2014	23.00	EUR
Domestic Funds Transfer	19-03-2014	12,367.00	INR
Internal Account Transfer	20-03-2014	7,865.00	GBP
Domestic Funds Transfer	20-03-2014	6,666.00	INR



Last 'n' transactions along with their initiation or last updating date and transaction amount are displayed in Pending for Authorization widget as shown above.

1. Click any of the displayed transactions. The system displays that transaction in detail in View Pending Authorization Transactions screen.

### View Pending Authorization Transaction

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
997585385220815	Domestic Funds Transfer	19-03-2014 17:27:19 GMT +0530	ashokcorp1	19-03-2014 17:27:19 GMT +0530	Initiated [1]	1	24-03-2014	

User Reference Number:  
Source Account: 1040410933047 104 10410933

2. Click the  icon in the widget to refresh the widget.
3. Click the  icon in the widget. The system displays the **View Authorization Transactions** screen.

### View Authorization Transactions

04-06-2014 14:53:19 GMT +0530

View By: Transaction Status

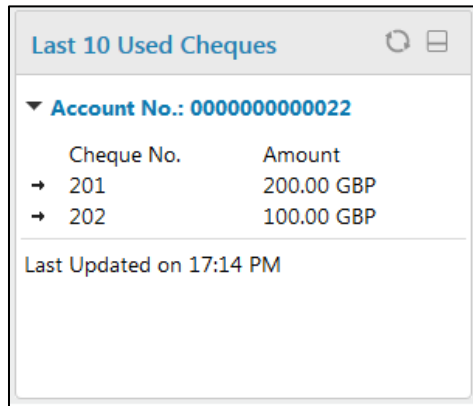
Initiated Transactions | View Drafts/Templates | **Transactions To Authorize** | View Transactions




Transaction Type	Status	Count	Percentage
Domestic Funds Transfer	Initiated	2	7.69%
Internal Account Transfer	Initiated	4	15.38%
International Draft	Initiated	1	3.85%
Open Term Deposit	Initiated	1	3.85%
Own Account Transfer	Initiated	18	69.23%

## 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



1. Click  next to 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  icon in the widget to refresh the widget.

### Cheque Status Inquiry

Select Account:\*

Status: \*

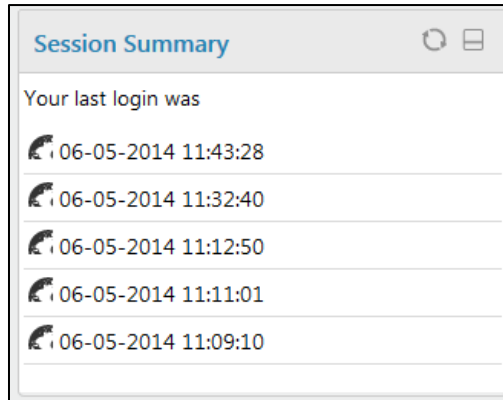
Search By Cheque Number


Fields marked as \* are mandatory.

## 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 next to the login details. The system displays the session information of the selected login in the Session Summary screen.

### Session Summary


The screenshot shows the "Session Summary" screen with a header bar containing the title, a timestamp "03-06-2014 16:52:52 GMT +0530", and navigation icons. Below the header, there is a table with the following data:

Channel User Id	AFRABRE	Session Start	03-06-2014 22:06:52 GMT +0530
<b>Transaction Name</b>		<b>Status</b>	<b>Transaction Date</b>
Login (LGN)		Success	03-06-2014 22:06:52 GMT +0530
<a href="#">Mailbox (IMS)</a>		Success	03-06-2014 22:06:56 GMT +0530
<a href="#">Mailbox (IMS)</a>		Success	03-06-2014 22:06:56 GMT +0530
<a href="#">Account Summary (ASM)</a>		Success	03-06-2014 22:06:56 GMT +0530
<a href="#">Transactions (VAT)</a>		Success	03-06-2014 22:06:56 GMT +0530
<a href="#">Transaction Blackout (TBO)</a>		Success	03-06-2014 22:06:57 GMT +0530
<a href="#">Loan Interest Rates (LIR)</a>		Success	03-06-2014 22:06:57 GMT +0530
<a href="#">Preferences (UPS)</a>		Success	03-06-2014 22:06:58 GMT +0530
<a href="#">Transactions (VAT)</a>		Success	03-06-2014 22:06:58 GMT +0530
<a href="#">Transactions (VAT)</a>		Success	03-06-2014 22:09:15 GMT +0530

2. Click the  icon in the widget. The system displays the Session Summary screen.

Session Summary

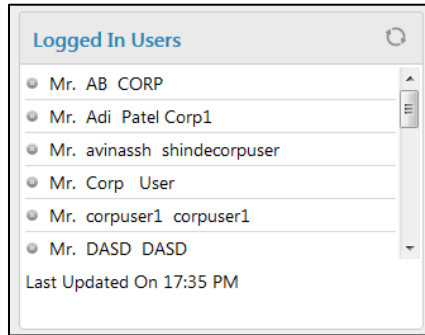
Channel User Id	Channel	Session Start	Session
AFRABRE	Internet Banking	03-06-2014 22:06:52 GMT +0530	View Session Info
AFRABRE	Internet Banking	03-06-2014 22:05:45 GMT +0530	View Session Info
AFRABRE	Internet Banking	03-06-2014 22:02:48 GMT +0530	View Session Info
AFRABRE	Mobile Application	03-06-2014 16:47:51 GMT +0530	View Session Info
AFRABRE	Mobile Application	03-06-2014 16:32:38 GMT +0530	View Session Info


- 3. Click the  icon in the widget to refresh the widget.

## 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. The 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.

### Widget – Logged In Users



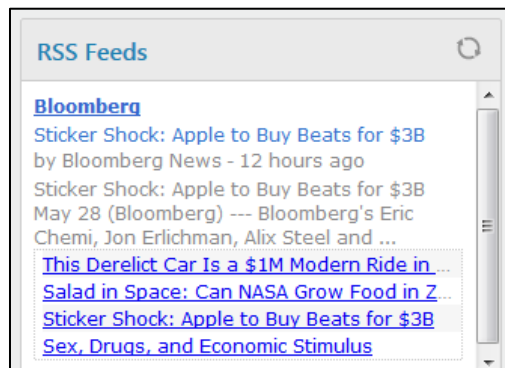
1. Click the  icon in the widget to refresh the widget.




## 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

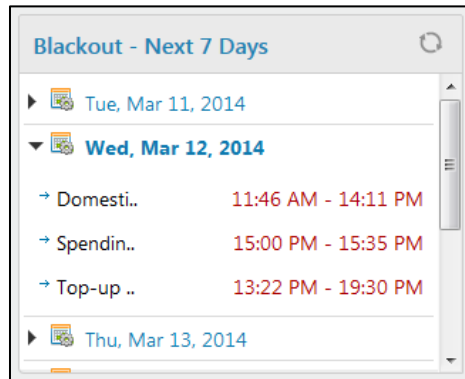




1. Click any of the links. The system will display its contents in a new window.
2. Click the  icon in the widget to refresh the widget.

## 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. Click the  icon in the widget to refresh the widget.

## 12. Notifications

This group of widgets displays notifications that are generated for the user. These widgets are present at the top right corner of the dashboard.

The widgets for notifications include:

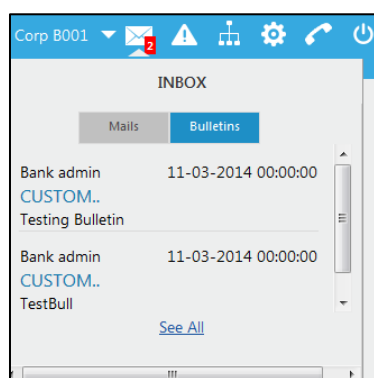
- **Inbox:** This widget displays Mails and Bulletins
- **Alerts:** This widget displays Alerts & Tasks

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 – Inbox

1. Click the **Mails** tab to view the unread mails.  
OR  
Click the **Bulletins** tab to view the unread bulletins.

### Inbox



2. Click any unread mail or bulletin in the Inbox widget. The system displays that mail or bulletin in **Mailbox** screen.

### Widget – Alerts

3. Click the **Alerts** tab to view the unread alerts.  
OR  
Click the **Tasks** tab to view the unread tasks.
4. Click any unread alert or task in the *Alerts* widget. The system displays that alert or task in the *Mailbox* screen.

## Mailbox

The screenshot shows a web-based mailbox interface. The title bar at the top left says "Mailbox" and the top right shows the date and time "04-06-2014 16:17:19 GMT +0530" along with several icons. On the left side, there is a navigation pane with folders: "Compose Message", "Inbox", "Interactions", "Alerts", "Bulletins", "Tasks", and "Sent Messages". The "Bulletins" folder is selected, and the main area displays a table of messages. The table has columns for "Message Id", "Subject", "Sender", "Received", and "Expires". Two messages are listed:

Message Id	Subject	Sender	Received	Expires
318	<a href="#">TestBull</a>	Bank admin	11-03-2014 11:00:00 GMT +0530	01-01-2015 10:5
417	<a href="#">Testing Bulletin</a>	Bank admin	11-03-2014 11:00:00 GMT +0530	11-03-2014 11:0

## 13. Reminders

This widget displays any reminders that you have created in the system for the current day, or for upcoming weeks or months. This widget is present at the top right corner of the dashboard.

### Widget- Reminders

1. Click the **Today** tab to view the unread reminders for the current day.  
OR  
Click the **Week** tab to view the unread reminders for the current week.  
OR  
Click the **Month** tab to view the unread reminders for the current month.
2. Click **Dismiss** to close a read reminder and then click **OK**.
3. Click **Add Reminder** to add a reminder from the widget. The system displays the **Registration** screen to register for new reminders.

### Registration

The screenshot shows a 'Registration' dialog box with the following fields and controls:

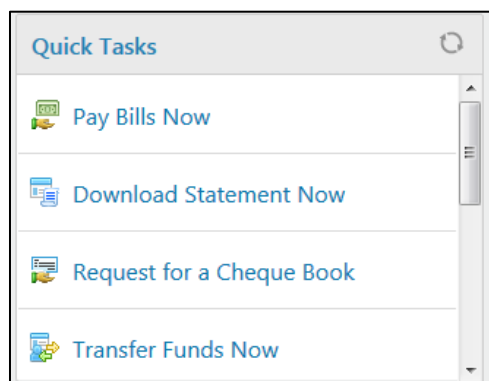
- Subject:** A text input field.
- Frequency:** A dropdown menu with 'Select' as the current value.
- Start Date:** A date picker field with a calendar icon.
- End Date:** A date picker field with a calendar icon.
- Description:** A large text area for entering details.
- Buttons:** 'Cancel' and 'Register' buttons at the bottom right.


4. Please refer to the *Reminders* section in the *User Manual Oracle FLEXCUBE Direct Banking Retail Customer Services* OR *User Manual Oracle FLEXCUBE Direct Banking Corporate Customer Services* for further details.

## 14. 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

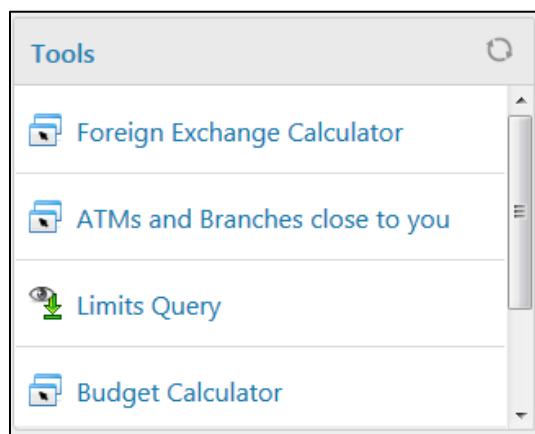



1. Click any of the transaction links. The system opens that transaction in a new window.
2. Click the  icon in the widget to refresh the widget.

## 15. 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

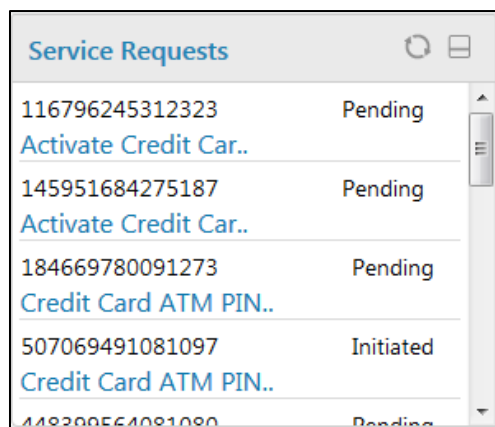


1. Select any tools/transaction from the dropdown.
2. Click the  icon in the widget to refresh the widget.

## 16. 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 updates 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 updates 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



Reference No	Status
116796245312323 <a href="#">Activate Credit Car..</a>	Pending
145951684275187 <a href="#">Activate Credit Car..</a>	Pending
184669780091273 <a href="#">Credit Card ATM PIN..</a>	Pending
507069491081097 <a href="#">Credit Card ATM PIN..</a>	Initiated
449200564081090 <a href="#">Credit Card ATM PIN..</a>	Pending

### Field Description

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

1. Click on any link showing the type of transaction in the widget. The system will display that transaction In View Initiated Transactions screen as shown below.



## View Initiated Transactions

View Initiated Transactions 02-06-2014 12:30:30 GMT +0530 ? [Print] [Star] [Close]

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
116796245312323	Activate Credit Card	28-03-2014 17:08:01 GMT +0530	corpa	28-03-2014 17:08:01 GMT +0530	Pending [60]	1		

Credit Card Number: 5200123420106751

Reason:

Credit Card Expiry Month:

Year: 2014

Embossing Name: rtyyyy



User Reference: ertyty

Note:

**Audit Detail**

Authorizer/s	Authorized On	Status	Value Date	Amount	Note
corpa	28-03-2014 17:08:01 GMT +0530	Pending [60]		--	
corpa	28-03-2014 17:08:01 GMT +0530	Authorized [3]		--	

Note : In case of modification,notes will be ignored.

2. Click the  icon in the widget to refresh the widget.
3. Click the  icon in the widget. The system displays the View Initiated Transactions screen.

## 17. 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
000000001	GBP-INR	06-08-0015	Sell	20,000.000 INR	Nil	10.0000

### Field Description

Field Name	Description
<b>Customer ID</b>	[Display] This column displays the Customer id for which the deal is booked.
<b>Buy Currency – Sell Currency</b>	[Display] This column displays the currency pair of the deal.
<b>Value Date</b>	[Display] This column displays the Value Date of the deal.
<b>Deal Type</b>	[Display] This column displays the Type of deal - buy or sell.
<b>Amount</b>	[Display] This column displays the Amount of the deal.
<b>Utilized Amount</b>	[Display] This column displays the Amount of the deal that has been utilized along with the currency.
<b>Rate</b>	[Display] This column displays the Rate at which the deal was made.

1. Click the  icon in the widget to refresh the widget.
2. Click the  icon in the widget. The system displays View Deal Details screen as shown below.

### View Deal Details

View Deal Details 04-06-2014 14:56:42 GMT +0530 ? [print] [star] [refresh] [close]

Customer Id:	All	▼		
Buy Currency:	Select	▼	Sell Currency:	Select
Deal Booking Date:		📅	Deal Number:	
Deal Type:	Select	▼	Value Date:	

**Search**