Oracle FLEXCUBE Direct Banking

Sites User Manual Release 12.0.3.0.0

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Sites User Manual

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1. Preface

1.1 Intended Audience

This sites user manual doc is intended to contributor user of FLEXCUBE Direct Banking. Contributor users have privileges to create new assets and modify existing assets.

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 document is divided into the following sections: Overview (a brief introduction), Prerequisites, creation of content creation of pages, ATM branch location configuration steps and configuration for mobile devices.

1.5 Related Information Sources

For more information on Oracle FLEXCUBE Direct Banking Release 12.0.3.0 sites module, refer to the following documents:

- Oracle FLEXCUBE Direct Banking Sites Developer Guide,
- Oracle FLEXCUBE Direct Banking Sites Installation Guide.doc

2. Overview

FLEXCUBE Direct Banking Sites help customers in rapidly rolling out their online banking portals

FLEXCUBE Sites offers a comprehensive extensible content model which will help a bank build web content (termed "Assets") effectively and rapidly. The content model helps in building the following "Asset Types"

- Product Catalogs
- Offers
- Service Catalogs
- FLEXCUBE Direct Banking Widgets
- Promotions/Recommendations
- Images
- General Content (Articles/Quick Links/Navigation Links etc...)
- ATM and Branch locater

3. Pre-Requisites

Oracle Webcenter Sites 11.0.8.0.0 should have been installed along with the FC Sites Content Model.

4. Creation of content

As mentioned earlier, FLEXCUBE Direct Banking Sites helps in building content and assemble pages to rapidly rollout an online portal

This section will demonstrate on how to build content from the various asset model already preconfigured with FLEXCUBE Direct Banking Sites

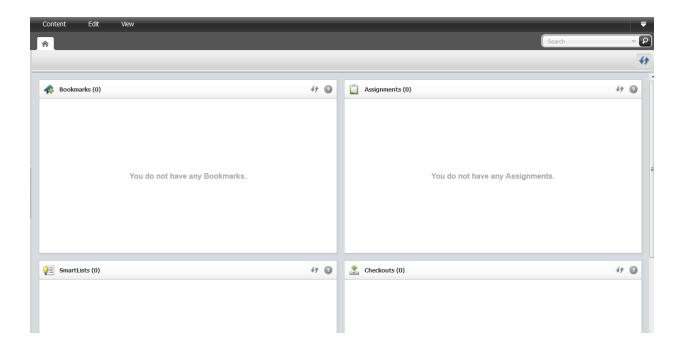
4.1 Product Creation

 Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"



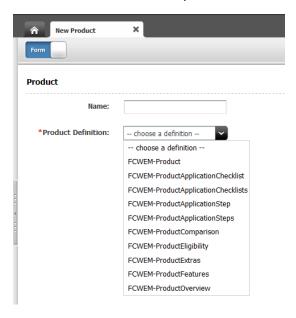
2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen



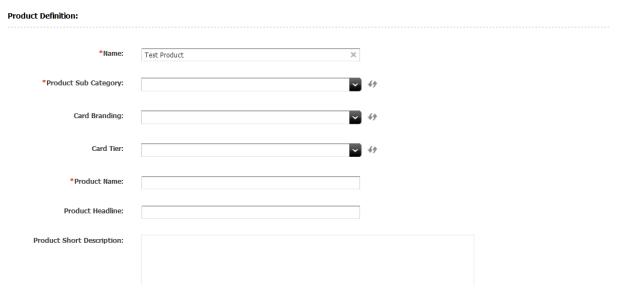


- 3. Click **Content > New > New Product**. This will display a sequence of screens that will be required to create a New Product
- 4. Enter a name and choose FCWEM-Product from the list of Product Definitions.
- 5. Click Continue

The list of attributes that make up the Product Definition is displayed.

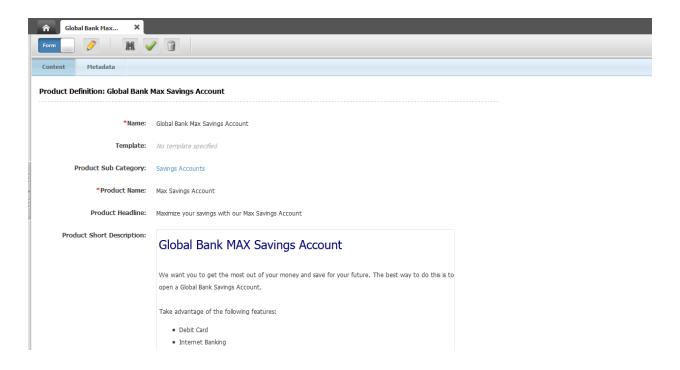


6. Enter values of the attributes one after the other and click the Save icon.



Any sample product can be viewed to see the kind of details that go into the creation of the product.

7. Click on Search -> Find Product -> Global Bank Max Savings Account



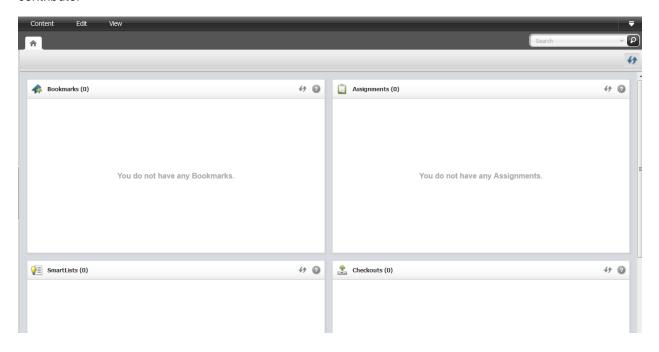
5. Offers Creation

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

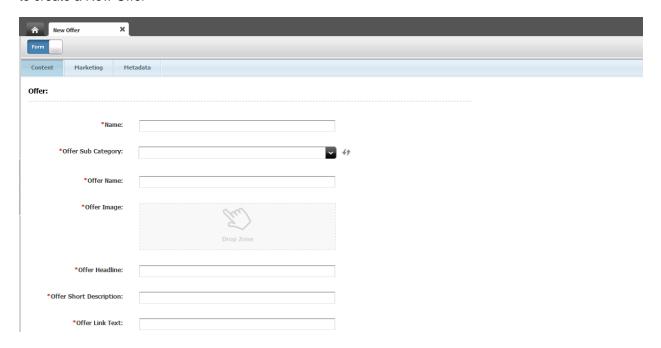


2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen





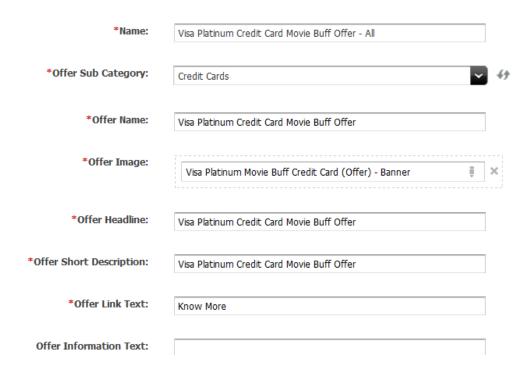
3. Click **Content -> New -> New Offer**. This will display a sequence of screens that will be required to create a New Offer



Any sample offer can be viewed to see the kind of details that go into the creation of the offer.

4. Click Search -> Find offer -> Visa Platinum Credit Card Movie Buff Offer

Offer: Visa Platinum Credit Card Movie Buff Offer - All



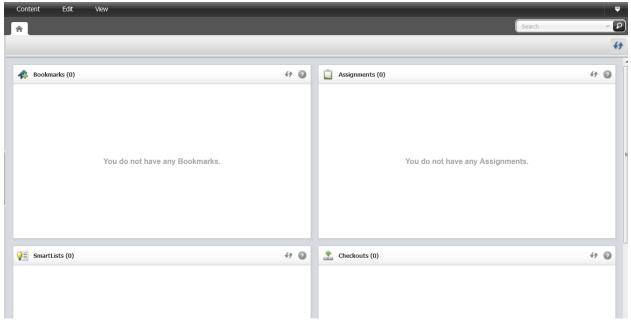
6. Services Catalog Creation

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"



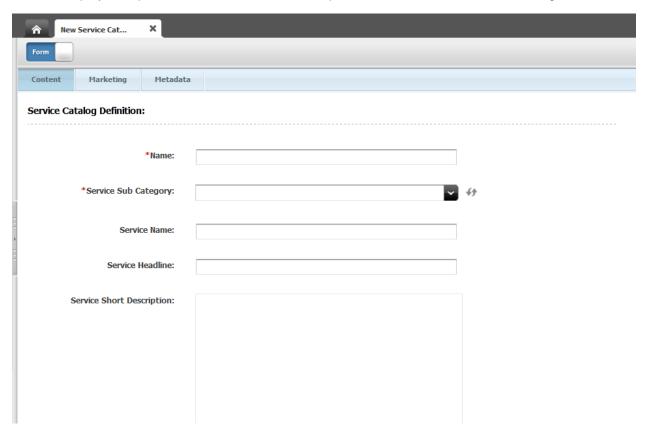
2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen





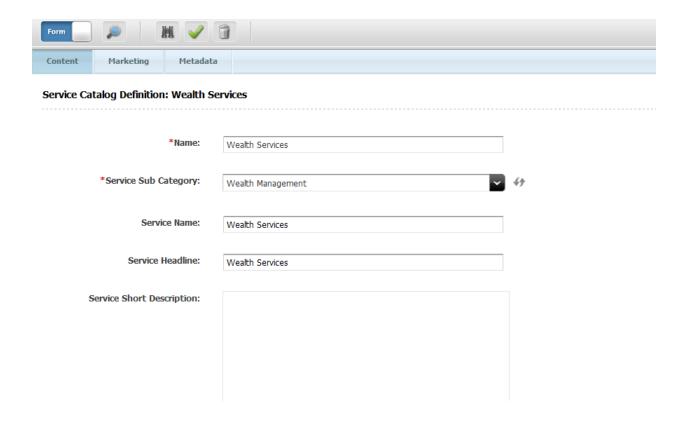
3. Click Content -> New -> New Service Catalog.

This will display a sequence of screens that will be required to create a New Service Catalog



Any sample offer can be viewed to see the kind of details that go into the creation of the offer.

4. Click on Search -> Find Service Catalog -> Wealth Services



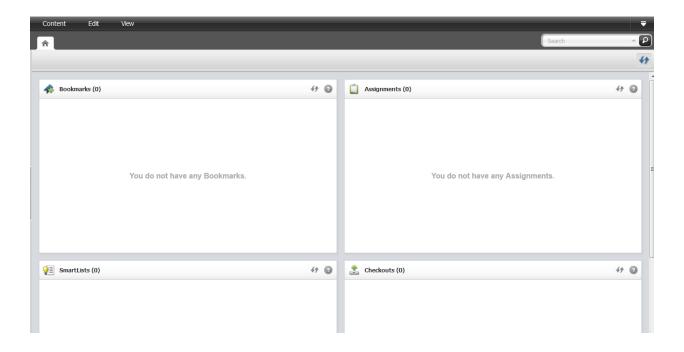
7. FCDB Widgets

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

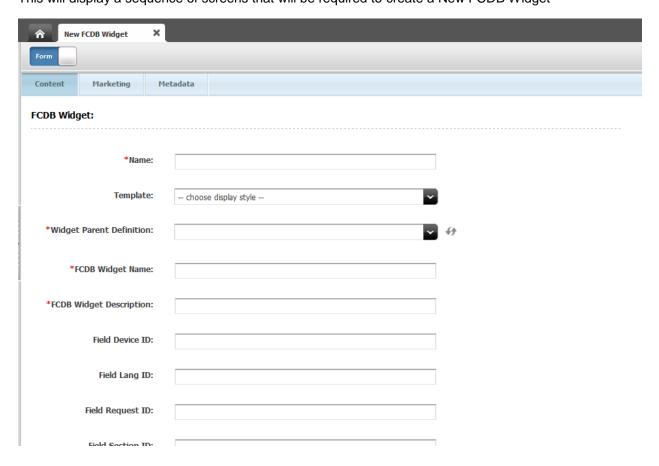


2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen



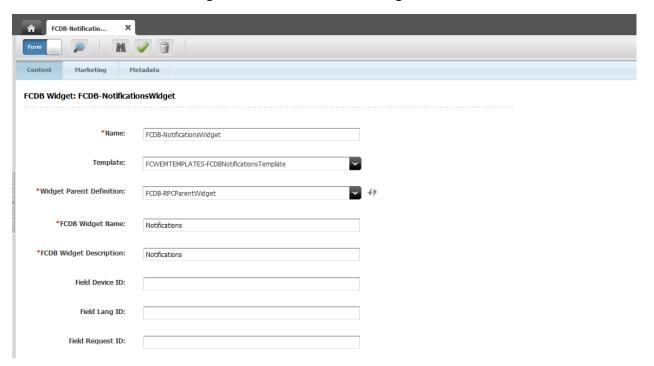


Click on Content -> New -> New FCDB Widget.
 This will display a sequence of screens that will be required to create a New FCDB Widget



Any sample FCDB Widget can be viewed to see the kind of details that go into the creation of the offer.

4. Click Search -> Find FCDB Widget -> FCDB Notifications Widget



7.1 Promotions/Recommendations

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

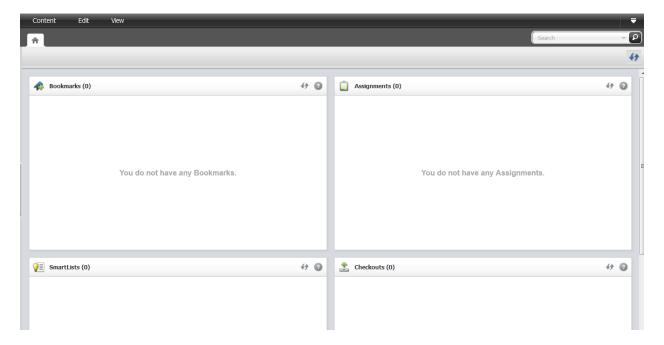


2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen

Contributor Icon

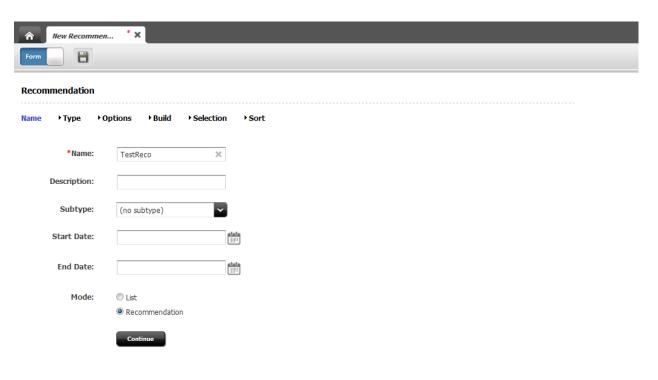


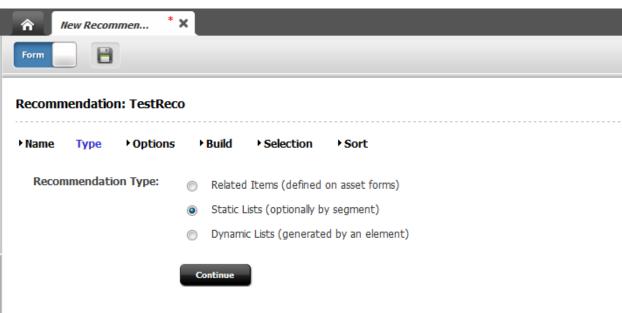
The contributor interface screen is displayed. This is the main workspace for any content contributor



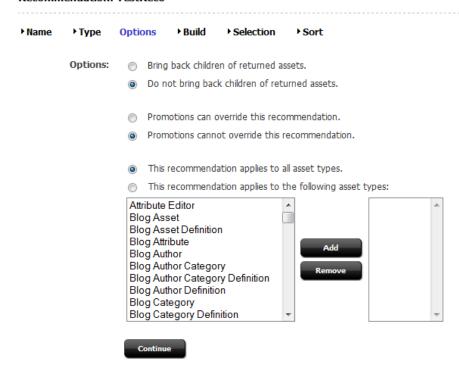
3. Click Content -> New -> New Recommendation.

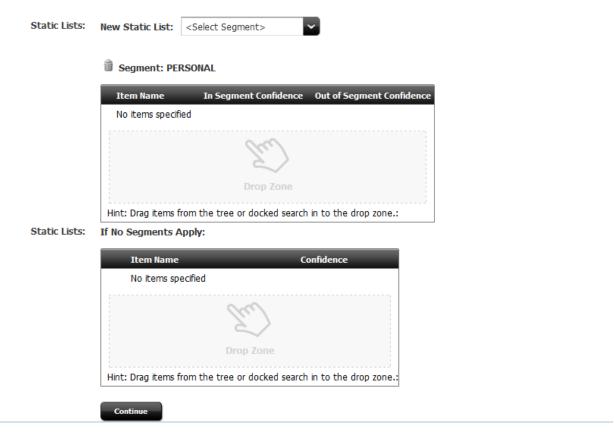
This will display a sequence of screens that will be required to create a New Recommendation





Recommendation: TestReco

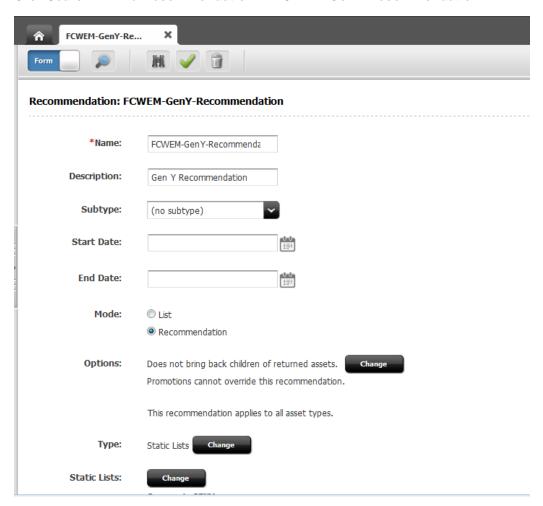




The drop-zones are content placeholders. Any kind of content created in the previous steps can be dragged and dropped to this zone

Any sample Recommendation can be viewed to see the kind of details that go into the creation of the offer.

4. Click Search -> Find Recommendation -> FCWEM-GenY-Recommendation



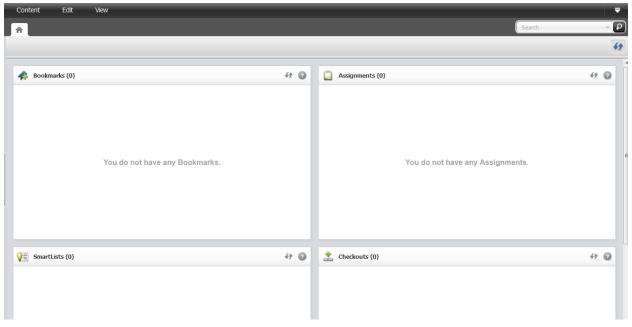
7.2 Images

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"



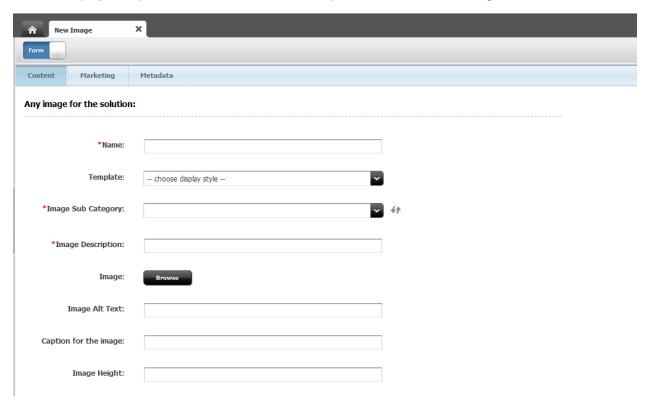
2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen





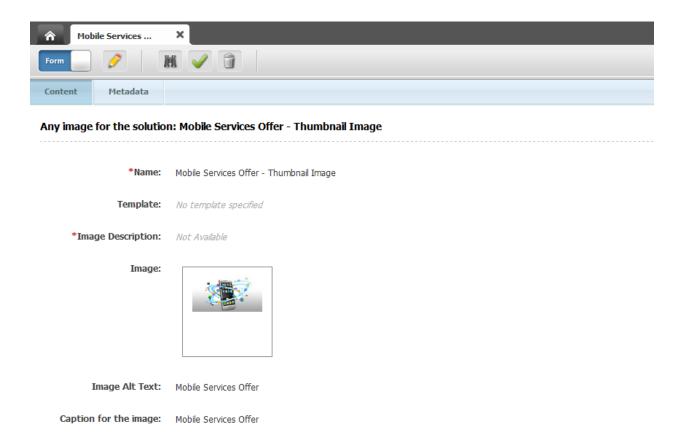
3. Click Content -> New -> New Image.

This will display a sequence of screens that will be required to create a New Image



Any sample Image can be viewed to see the kind of details that go into the creation of the Image.

4. Click Search -> Find Image -> Mobile Services Offer - Thumbnail Image



7.3 General Content

1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

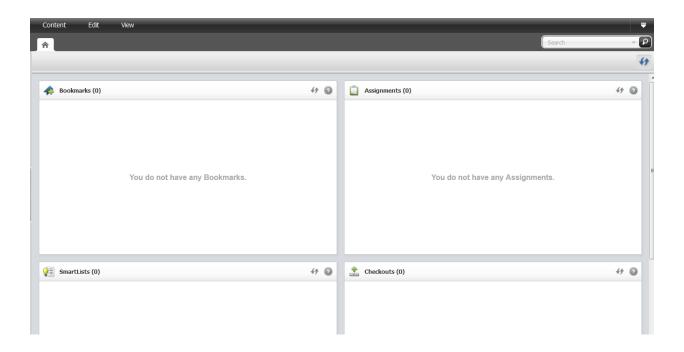


2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen

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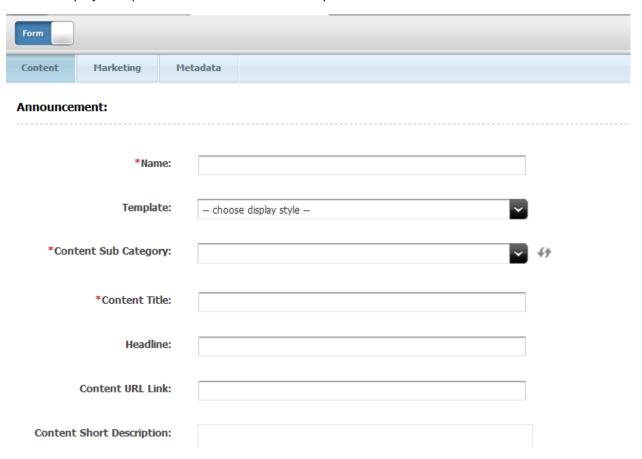
Contributor Icon





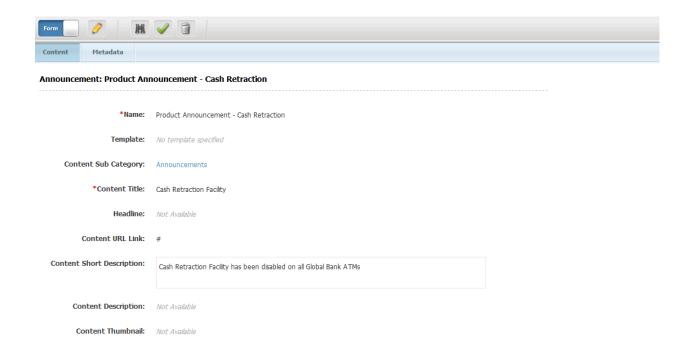
3. Click Content -> New -> New Content.

This will display a sequence of screens that will be required to create a New Content



Any sample Content can be viewed to see the kind of details that go into the creation of the Image.

4. Click Search -> Find Content -> Product Announcement - Cash Retraction



8. Creation of Pages

Once the content has been created, pages have to be setup.

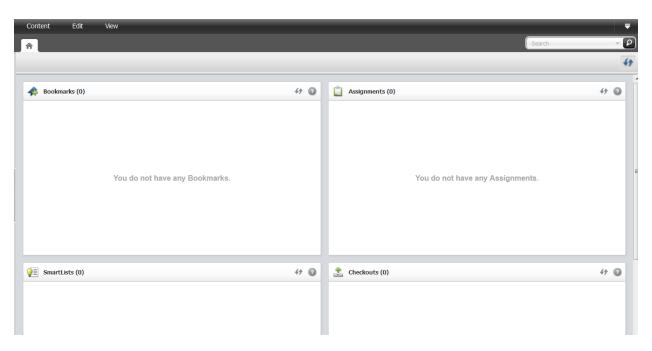
8.1 Page Creation

 Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

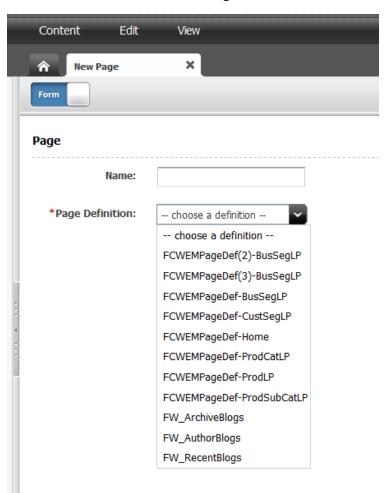


2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen



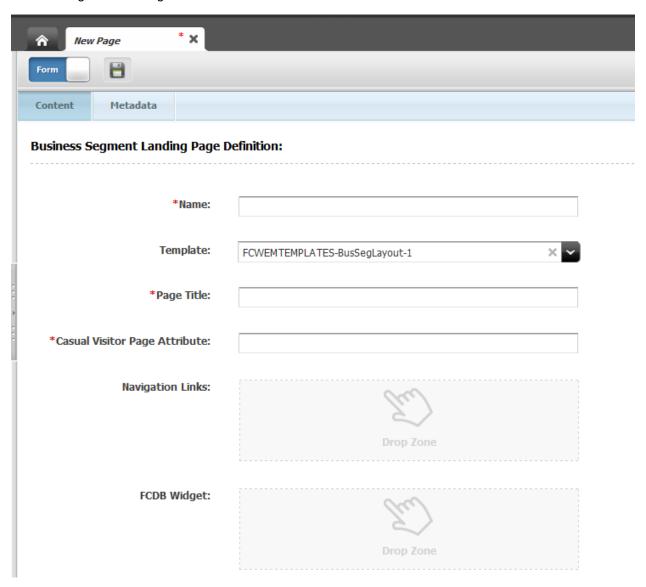


3. Click on Content -> New -> New Page



FLEXCUBE Sites offers OOTB a set of Page Definitions which can be utilized by the bank to create new pages. Alternatively, it is very easy for a bank to create their own Page Definitions

In our case, we will choose to create a Business Segment Landing Page. Choose FCWEMPageDef-BusSegLP

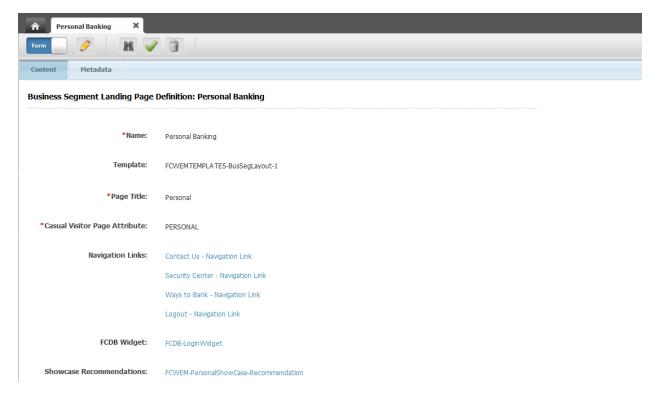


4. Enter the set of attributes as mentioned and click on the "Save" icon.

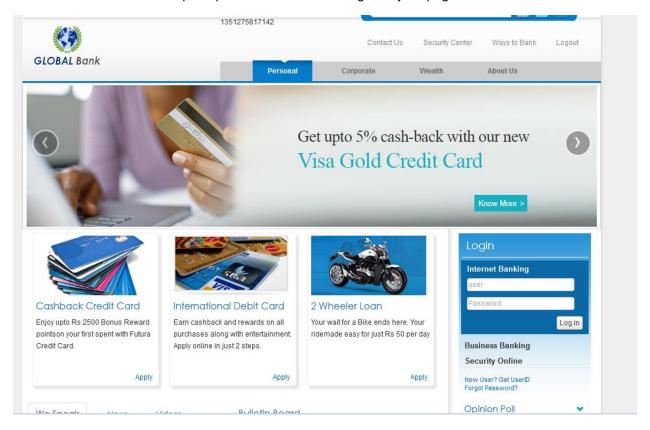
Note: You can also choose the "Web" mode to have a visual representation of the page as you continue editing it

Any sample Page can be viewed to see the kind of details that go into the creation of the Image.

5. Click on Search -> Find Page -> Personal Banking



6. At any time, to preview your changes, click **View -> Preview in New Window**. A new browser window will open up which shows the changes of your page.



9. New ATM or Branch locater configuration steps

9.1 Locater Asset

Locater asset family provides the functionality to the user to locate ATM or Branch on map. To mark a new location on you need to first create a Locater Parent which specifies the country in which ATM is located. All ATM and Branch are located in same country have the same Locater Parent.

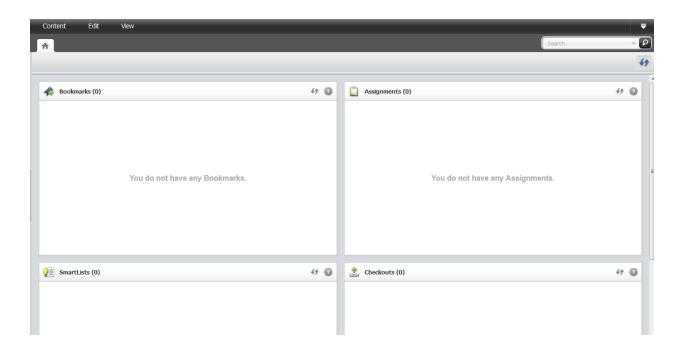
Creating New Locater Parent Assets

- 1. Login in FlexCube Sites in contributor mode.
- 2. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"

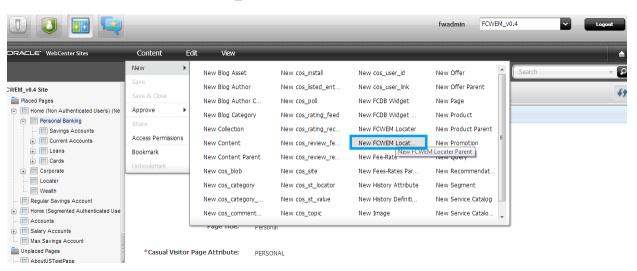


3. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen

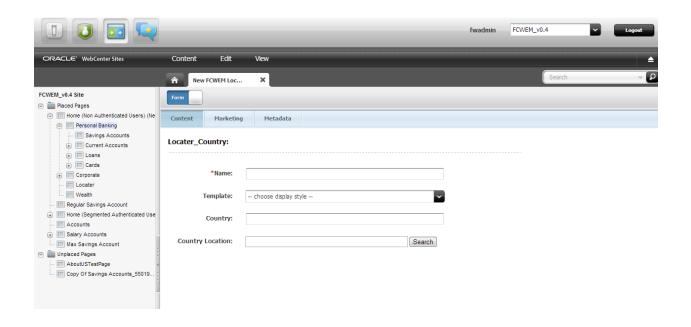




4. Click Content -> New -> New FCWEM_Locater Parent



Following screen will appear

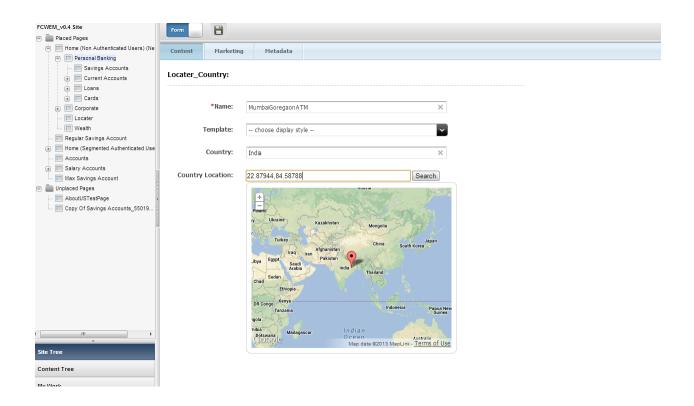


Fill the form according the table

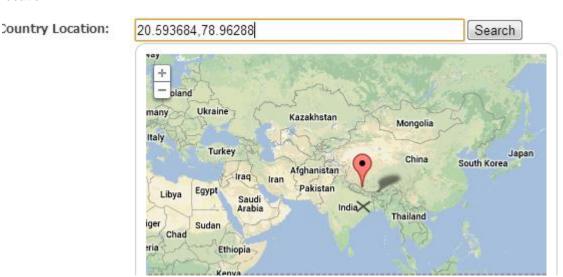
Column Description

Column Name	Column Value
Name	Name of the asset
Country	Country name in which ATM / Branch is located
Country Location	This column contains longitude and latitude of geographical location of country. To get this column value (longitude and attitude) name of location. You can also put longitude and attitude direct in given text box.

5. After filling country name and in text box click **Search** button. Following screen appears



6. To adjust the longitude and latitude on map click on red mark on the map and drag to desired location.

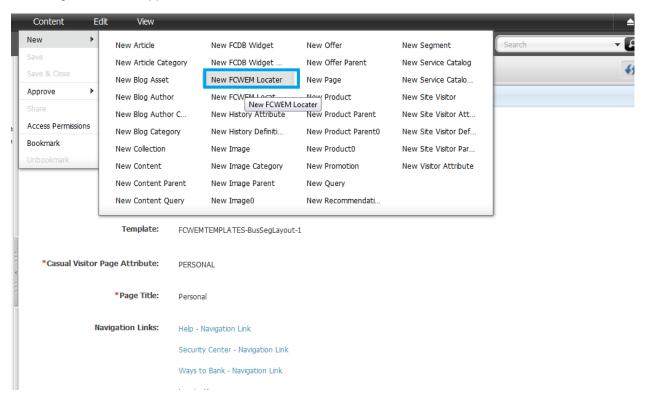


- 7. After proving the value of all required field to save the asset and close the tab.
- 8. Go In the menu bar, select **Content > Save & Close**.

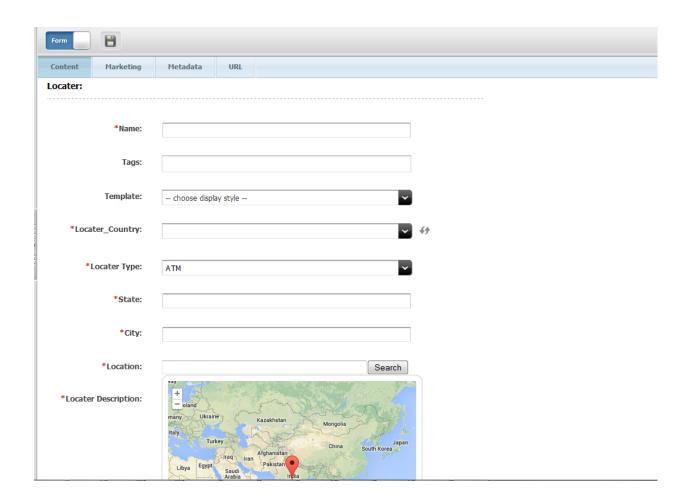
9.2 Creating New Locater Assets

1. Click Content -> New ->New FCWEM_Locater

Following window will appear



2. After click on FCWEM_Locater following content form will appear.



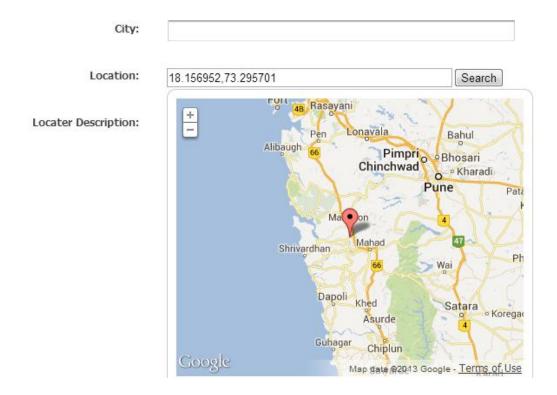
To fill the contributor form please refer the below table

Column Description

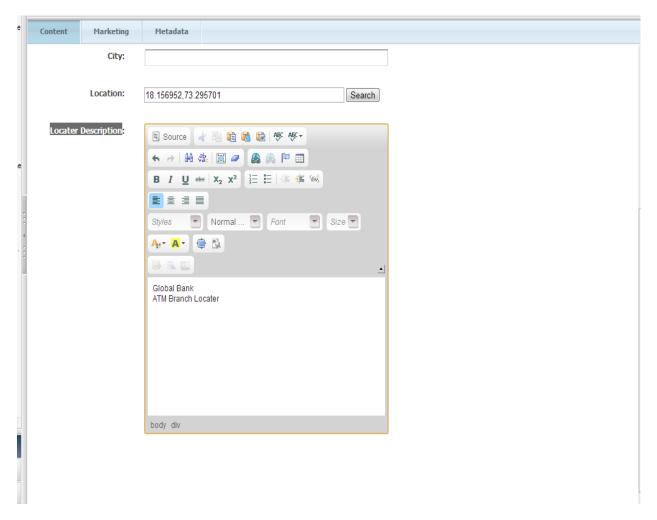
Column Name	Column Value
Name	Name of the asset
Locater_Country	Select the country name from parent asset.
Locater Type	Select Locater type from drop down acceptable values is ATM and Branch.

Column Name	Column Value
State	Enter state where ATM/Branch is located.
Location	This text box contains the longitude and attitude of geographical location where ATM/Branch is located. To fill this column value you can enter longitude and latitude value directly or enter the location name and click on search batten.
Locater Descriptor	This column contains description of ATM/Branch.

3. To find longitude and latitude of location of ATM/Branch enter the name of location and click on search button. Following screen will appear. You can adjust longitude and latitude location by dragging click on red marker on desired location.



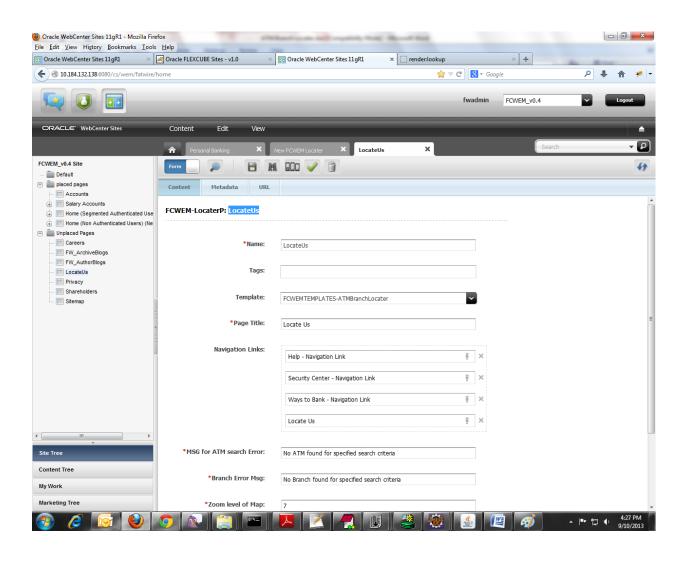
4. To add the Locater Description click in text box. Following screen will appear. You can format your content using CKEditor. This description wills we displayed for this ATM/Branch when user hover mouse over this location on map.



9.3 Configuring default location when page load

To configure default location of map when locater page load follow these steps.

1. Login to contributor interface and open LocateUs page in edit mode.



2. To fill the contributor form of LocateUs page please refer the below table

Column Description

Column Name	Column Value	
Name	Name of the asset(No need to change if you are changing default map load values)	
Page Title	Title of page. Title field also defines the name of link on personal page.	
MSG for ATM search Error	Message to user when user search criteria did not match to any available ATM	
MSG for Branch search Error:	Message to user when user search criteria did not match to any available Branch	

Column Name	Column Value
Map Default Focus Location	This text box contains the longitude and attitude of geographical location where ATM/Branch is located. To fill this column value you can enter longitude and latitude value directly or enter the location name and click on search button.
Zoom level of Map	Specifies the zoom level of map.

10. Viewing Content on Mobile Devices

10.1 Overview

FlexCube Site provides set of devices which allows user to see preview content on different devices like iPhones, iPads, Android Phone, Android Tablets, and Desktop etc. To view the content in a particular device follow following steps.

10.2 Viewing Content on Mobile Devices

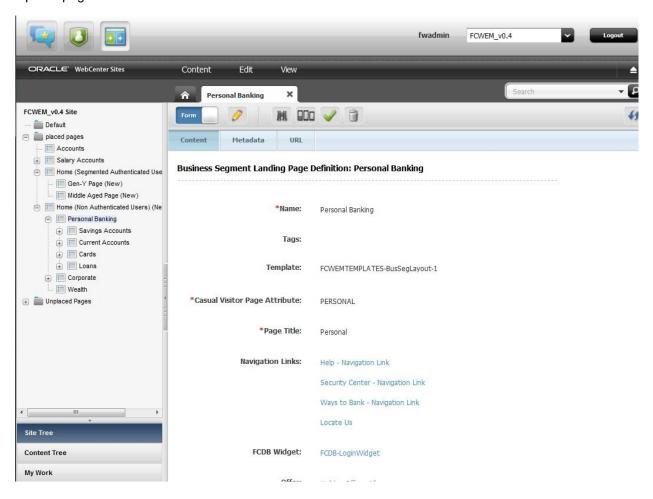
- 1. Login in FlexCube Sites in contributor mode.
- 2. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"



3. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen



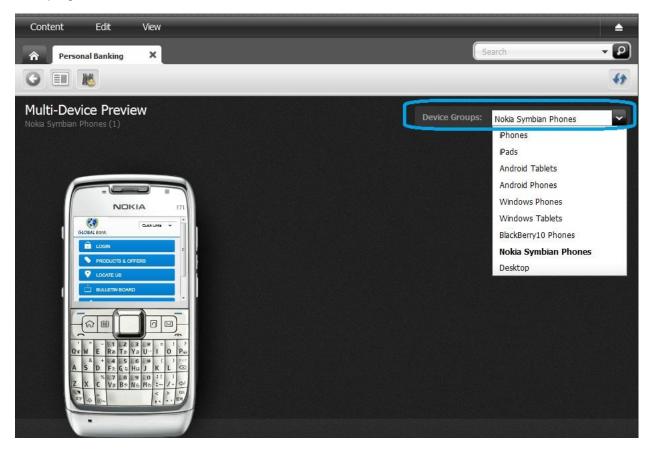
4. Open a page to be viewed.



5. Select multi-device preview as shown below:



6. On top-right corner select the desired device:



So according the size of the device, the content will be displayed either in mobile or desktop view, as show below:



10.3 Working Summary:

The display of the content in either view (mobile, desktop) depends on the width of the device rendering it. If the width of the device is less than 767px the mobile view is rendered while device width with greater than 767px gives desktop view.

This is done by using responsive css which gets the window's resize function and renders following divs:

11. Pretty URL

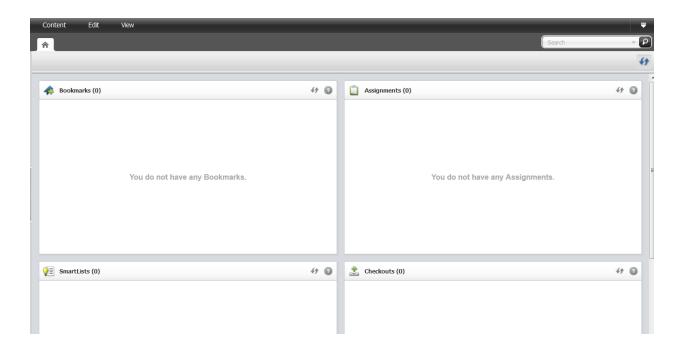
1. Login as the administrator for FLEXCUBE Direct Banking Sites using the credentials "fwadmin/xceladmin"



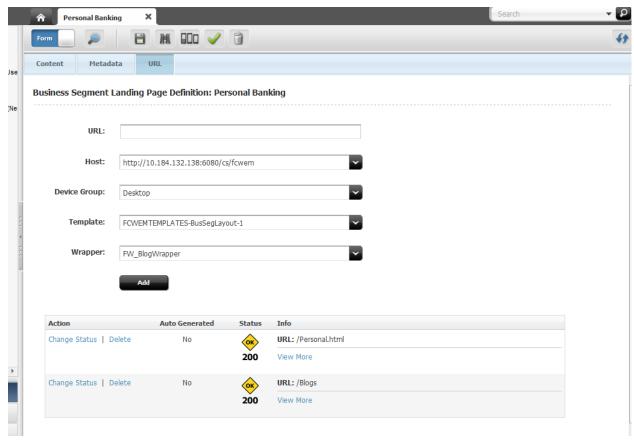
2. Once logged in, choose the site FCWEM_v0.4 on the top-right corner of the screen and click on the Contributor icon on the top-left corner of the screen



The contributor interface screen is displayed. This is the main workspace for any content contributor

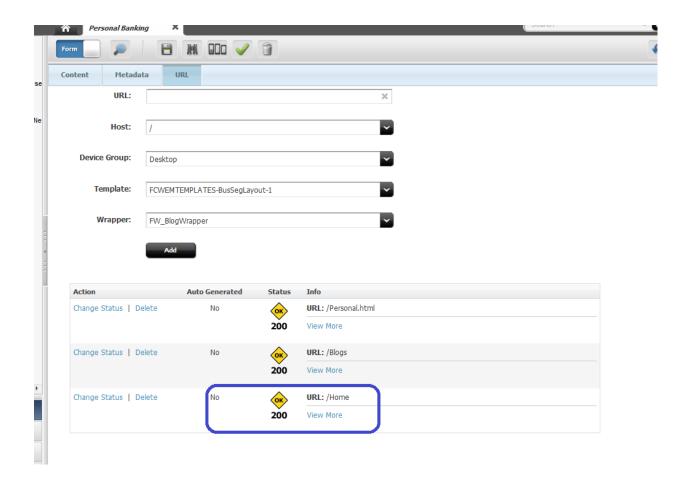


- 3. Select the asset for which you want to change the url. Here we are going to modify url of personal page
- 4. Open Personal page in edit mode. Following screen will appear



- 5. Enter the URL value which you want to for this page. In this example we want to make personal page as Home in url.
- 6. So make URL attribute value Home.
- 7. Select relative("/") host value from dropdown.
- 8. Select Device Group from drop down for which you wants to create pretty url.
- 9. Select template and Wrapper used for rendering page from drop down and click on add button.

New url for this page is added in the url list. Save asset.



10. Preview the page in new window.

Now url is contain page name as Home.

