Oracle Banking Digital Experience

Core User Manual
Release 16.1.0.0.0

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Core 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 Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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.

Introduction provides brief information on the overall functionality covered in the User Manual.

The subsequent chapters provide information on transactions covered in the User Manual.

Each transaction is explained in the following manner:

- Introduction to the transaction
- Screenshots of the transaction
- The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.
- Procedure containing steps to complete the transaction- The mandatory and conditional fields of the transaction are explained in the procedure.

If a transaction contains multiple procedures, each procedure is explained. If some functionality is present in many transactions, this functionality is explained separately.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 16.1.0.0.0, refer to the following documents:

- Oracle Banking Digital Experience Licensing Guide
- Oracle Banking Digital Experience Installation Manuals

2. Core

The Core module allows the bank administrator to carry out basic customer maintenance and administrative activities like various configurations for application user which includes setting up access rights, setting up authorization parameters and different type checks on activities perform by users within the application.

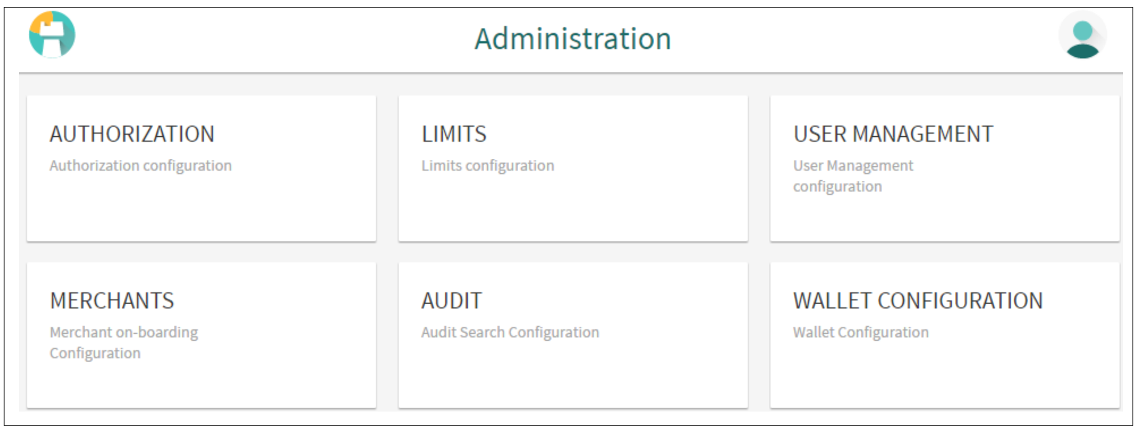
3. Core Dashboard

The dashboard displays the consolidated list of maintenances that can be performed by bank administrator.

Below are the administration dashboard components:

- Authorization
- Limits
- User Management
- Merchants
- Audit
- Wallet Configuration

Click on individual components to see the detailed snapshot.



Dashboard Overview

Authorization

This option allows you to maintain authorization components like Policy Domain, Policy, Resources, and Roles. On clicking, it takes you to an **Authorization** screen.

Limits

This option allows you to maintain limits. On clicking, it takes you to a **Limits** screen.

User Management

This option allows you to maintain users in the application. On clicking, it takes you to a **User Management** screen.

Merchants

This option allows you to maintain merchants in the application. On clicking, it takes you to a **Merchant Onboarding** screen.

Audit

This option allows you to view the audit log which is maintained for any tasks or transactions accessed by users. On clicking, it takes you to an **Audit** screen.

Wallets Configuration

This option allows you to create and maintain wallet products that are made available for the business users. On clicking, it takes you to a **Wallets Configuration** screen.

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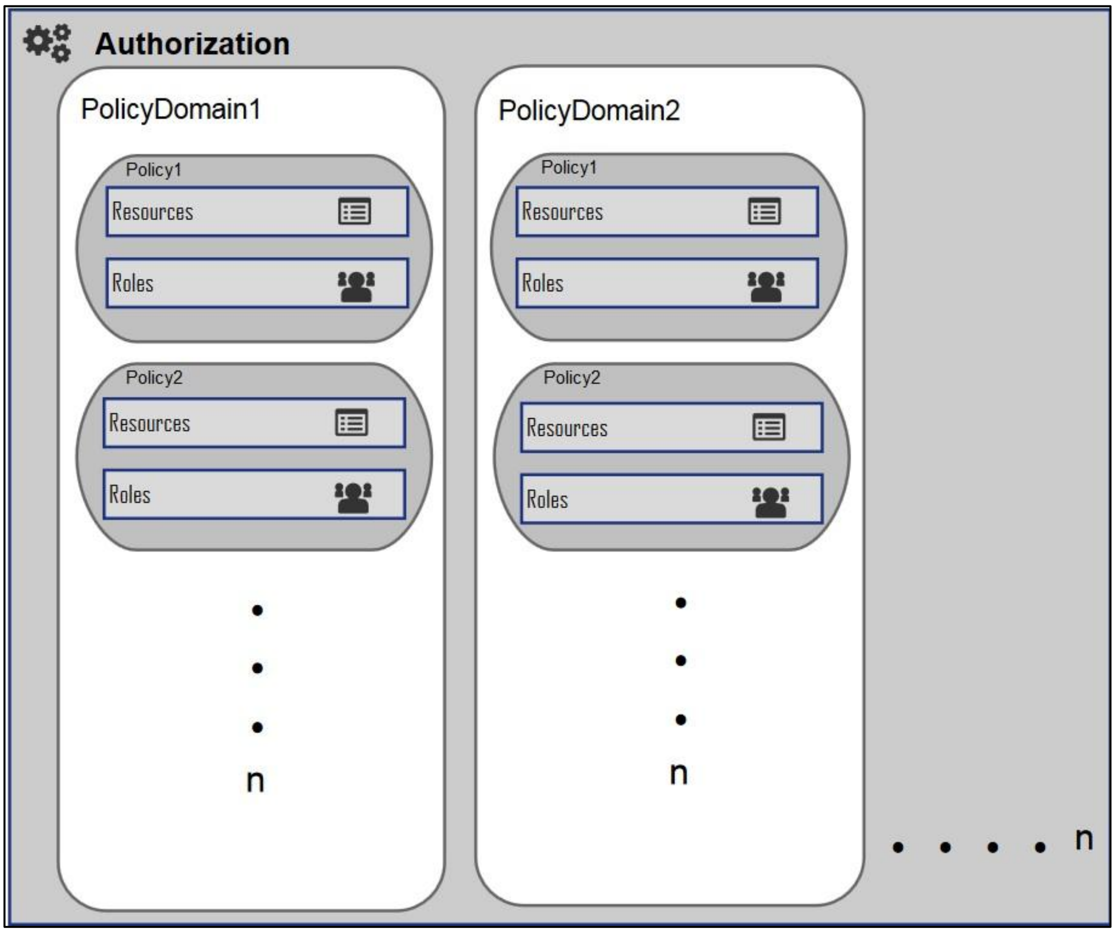
4. Authorization

Authorization allows an organization to protect its resources by defining and managing policies that control access to, and usage of, these resources. Access privileges are defined in a policy by specifying who can do what to which resource. Current Authorization supports the creation of Role Based Authorization Policies. This mapping allows users in external groups to access resources as specified by the Application Roles.

Authorization consists of multiple policy domains for logical separation of policies. Each Policy Domain holds multiple policies for that policy domain. Policy determines access permissions on different resources specific to each entity. The policy consists of relation between one or more resources/entitlements and roles.

Below diagram shows the relationship and hierarchy of Authorization components like Policy Domain, Policy, Resources, and Roles.



The Authorization allows the bank administrator to:

- Create and Edit Policy Domain
- Create, View and Edit Policies
- Create, View and Edit Application Resource
- Create, View and Edit Application Role
- Create, View and Edit Entitlement

4.1 Authorization - Policy Domain

Administration of the policies securing one protected application may be delegated using one or more (optional) Policy Domains. The use of multiple Policy Domains allows policies to be partitioned according to some defined logic, such as the architecture of the protected application or depending on business purpose for securing various resources.

Using this option you can create, edit and delete the policy domain. The Policy Domain is the parent screen from which you can create and edit the policies.

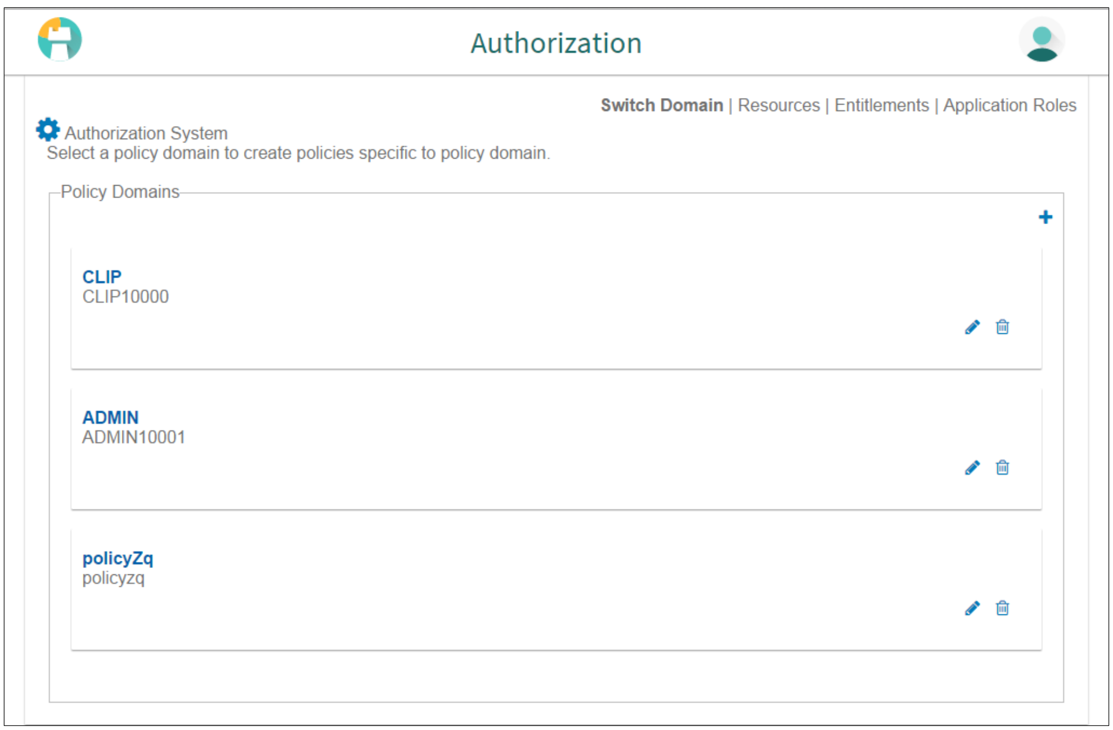
4.1.1 Create Policy Domain

Using this option you can create a new policy domain.

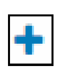
How to reach here:

Dashboard > Authorization > Policy Domain

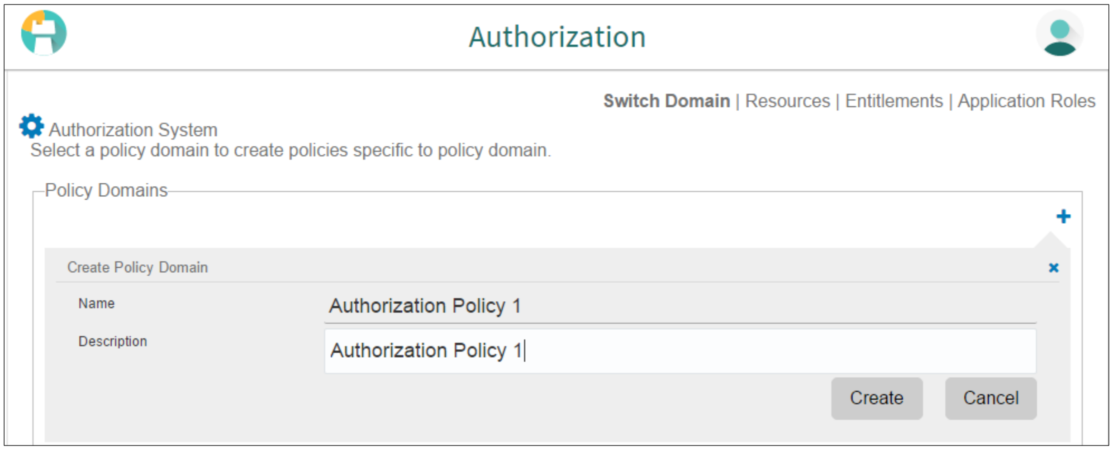
Policy Domain



To create a new policy domain

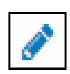
1. In the **Policy Domain** section, click . The **Create Policy Domain** screen appears.

Crate Policy Domain



Field Description

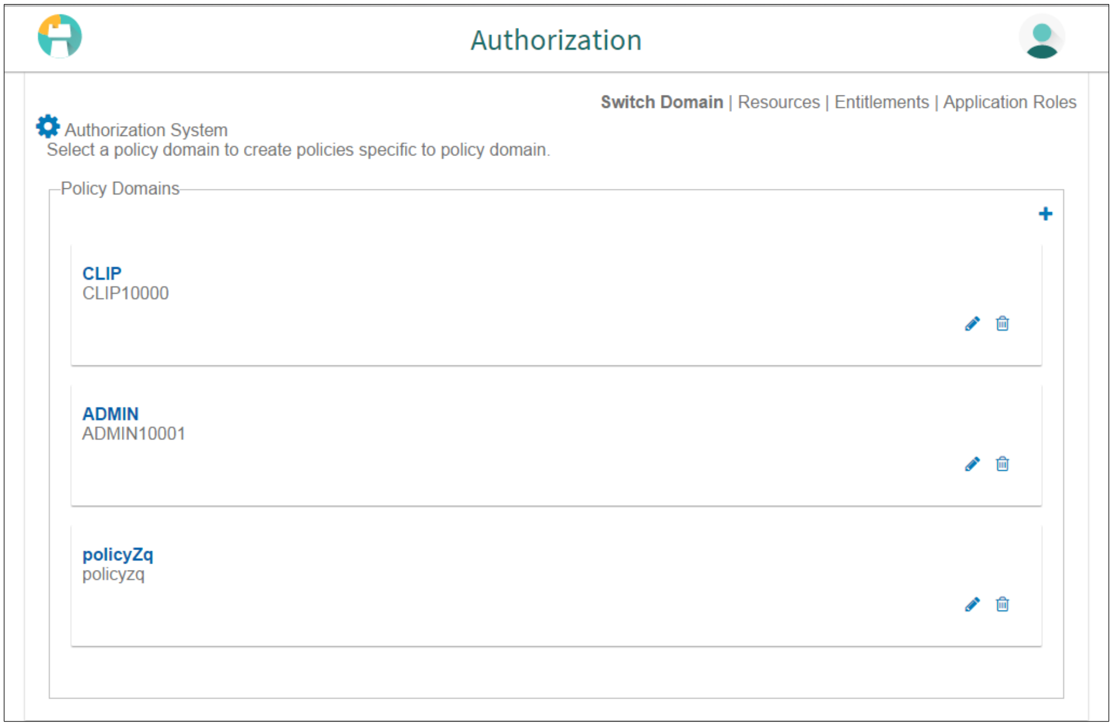
Field Name	Description
Name	Name of the policy domain.
Description	Description of the policy domain.

2. In the **Name** field, enter the name of the policy domain.
3. In the **Description** field, enter the description of the policy domain.
4. Click **Create**.
   OR
   Click **Cancel** to cancel the transaction.
5. The screen with success message appears; click  if you want to edit the policy domain.

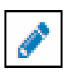
4.1.2 Update Policy Domain

Using this option you can edit or update the details of an existing policy domain.

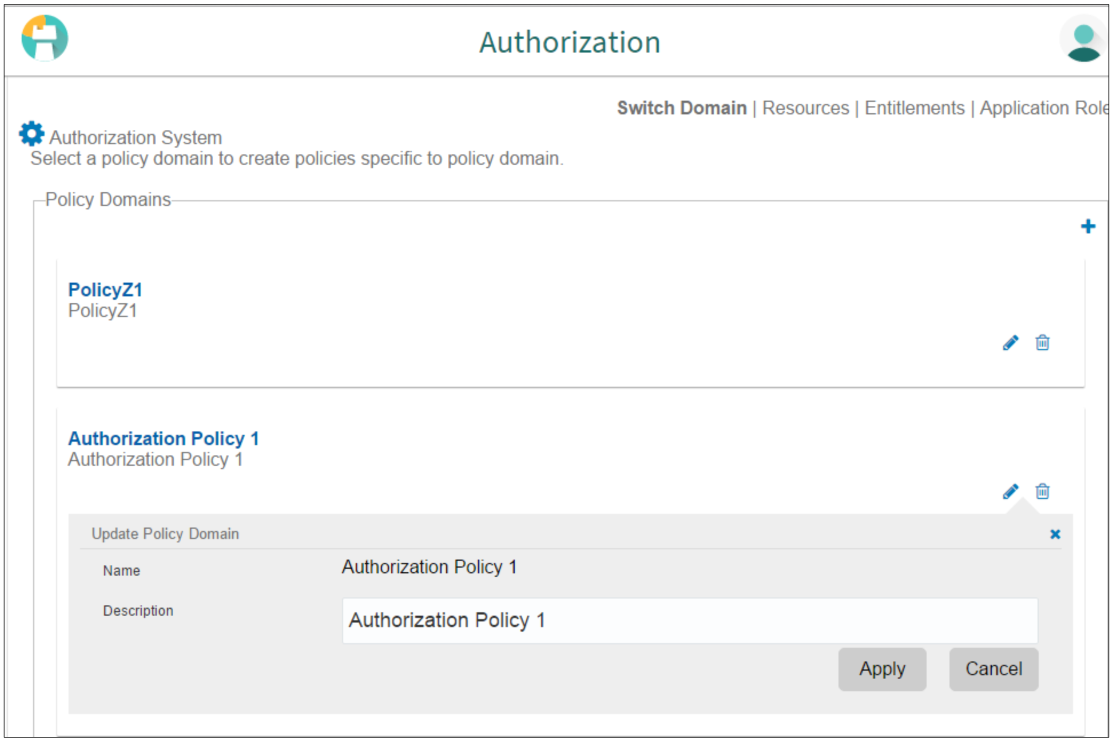
Policy Domain



To edit a policy domain:

1. Click  of the record which you want to edit. The **Update Policy Domain** section appears.

Update Policy Domain



2. In the **Description** field, edit/update the description of the policy domain if required.
3. Click **Apply**.
   OR
   Click **Cancel** to cancel the transaction.
4. The screen with success message appears. Click if you want to delete the record.

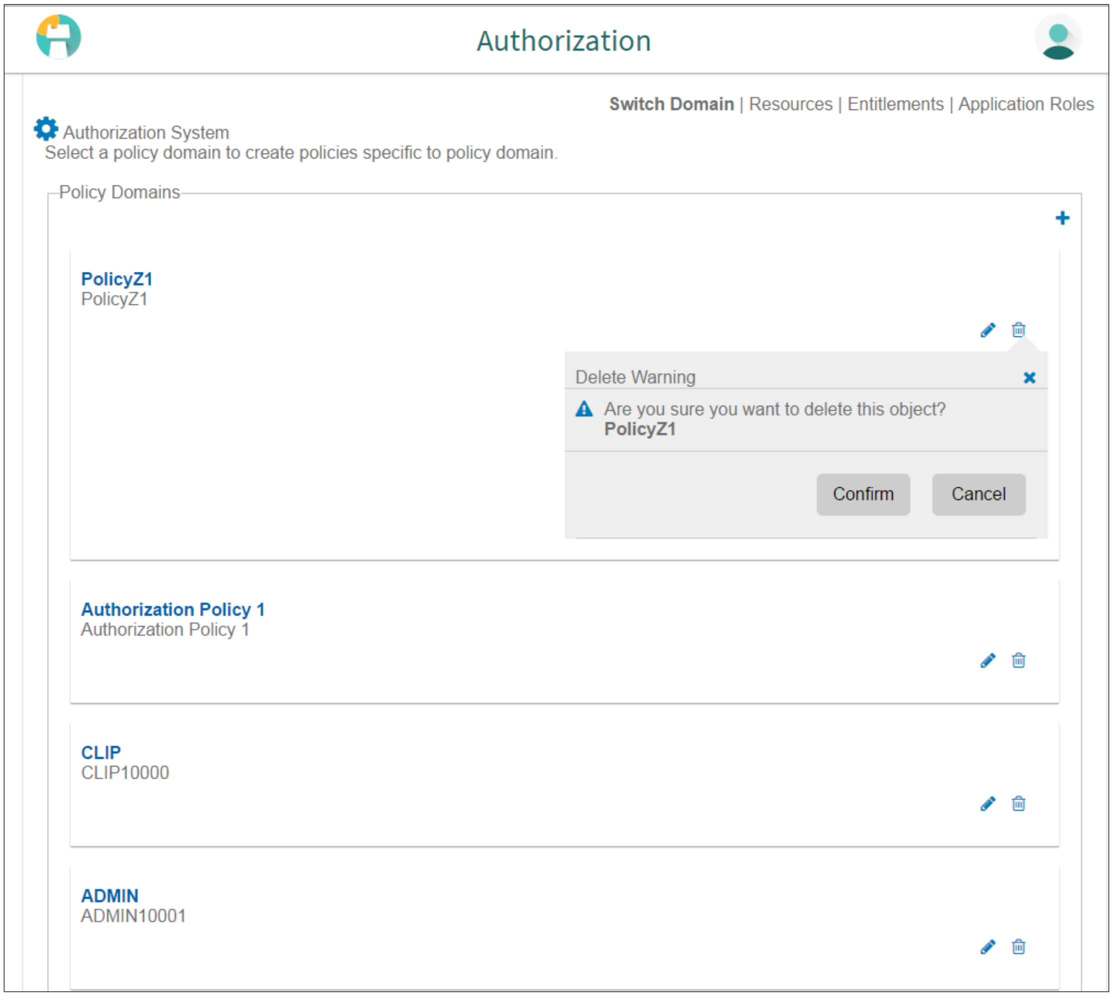
4.1.3 Delete Policy Domain

Using this option you can delete an existing policy domain.

To delete a policy domain:

1. Click for the record which you want to delete. The Delete Warning message appears.

Delete Policy Domain



2. Click **Confirm**.
3. The **Policy Domain** screen with the successful object deletion message appears. Click **Done** to complete the transaction.

4.2 Policies

An Authorization Policy specifies whether an entity (Application Role/Enterprise Role) is allowed on a protected targets (Resources/Entitlements). An Authorization Policy defines mapping between resources/entitlements and application roles/enterprise roles. Each policy can be designed to PERMIT or DENY access to targets depending on business regulations. Policy can have multiple resources or multiple application roles.

Note: While creating/updating policy, an administrator must add at least one resource or entitlement and at least one application role or enterprise role.

Using this option you can search, update/ edit and delete the policies.

4.2.1 Search Policy

Using this option, you can search policies based on the search criteria. You can view the list of all the policies, if the search parameters are not specified.

To search policies

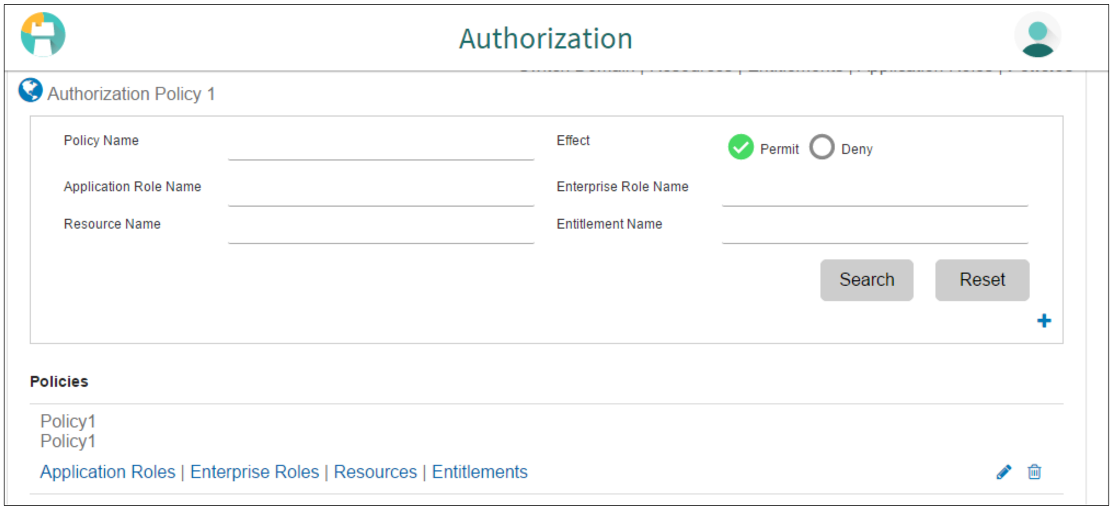
1. In the **Policy Domain** section, click the required policy link. The **Authorization Policy** screen appears.

Field Description

Field Name	Description
Name	Name of the policy.
Effect	Type of effect. The options can be: • Permit • Deny
Application Role Name	Name of the application role.
Enterprise Role Name	Name of the enterprise role.
Resource Name	Name of the resource.
Entitlement Name	Name of the entitlement.

2. Click **Search**.
3. The **Authorization Policy** screen with search results appears. Click **Reset** to reset the search parameters.

Search Policy - Search Results



Field Description

Field Name	Description
Policy Name	You can view the following policy details: • Policy Name • Policy Description

4. Click . The **Edit Policy** section appears.
   OR
   Click . The Delete Warning message appears.
   OR
   Click the **Application Roles** link. The **Application Roles** section appears.
   OR
   Click the **Enterprise Roles** link. The **Enterprise Roles** section appears.
   OR
   Click the **Resources** link. The **Resources** section appears.
   OR
   Click the **Entitlements** link. The **Entitlements** section appears.

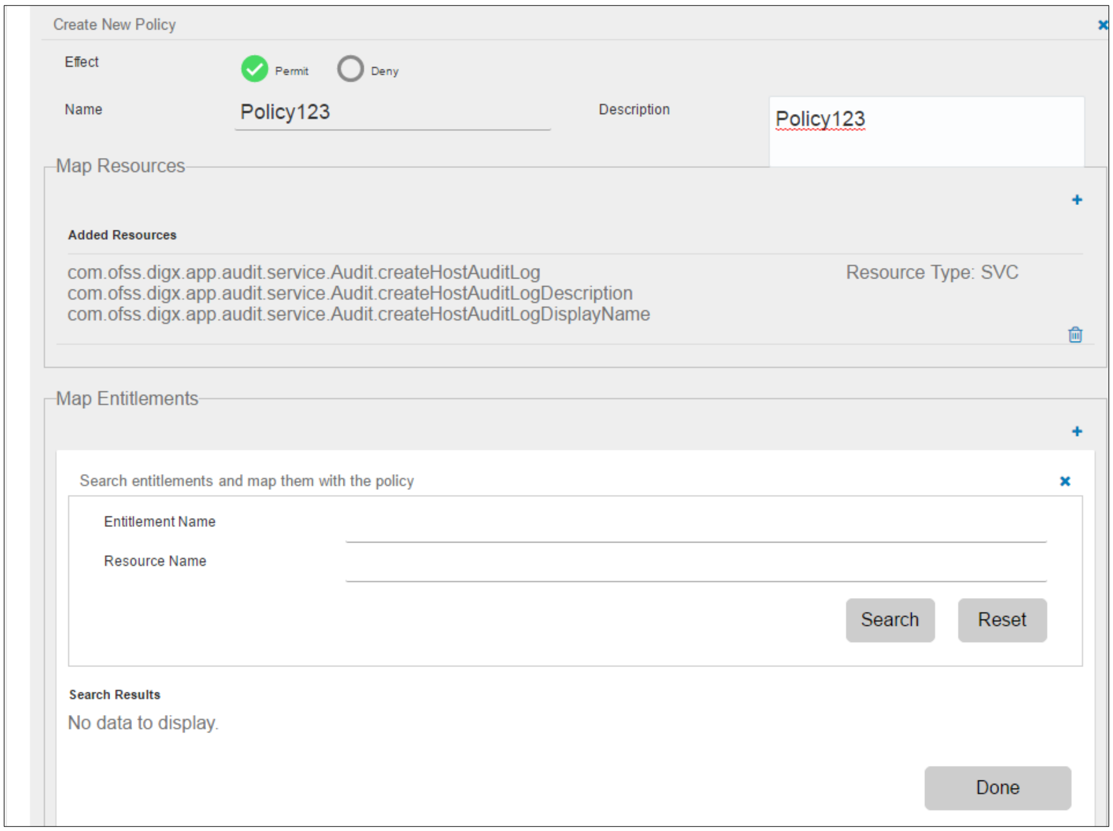
4.2.2 Create Policy

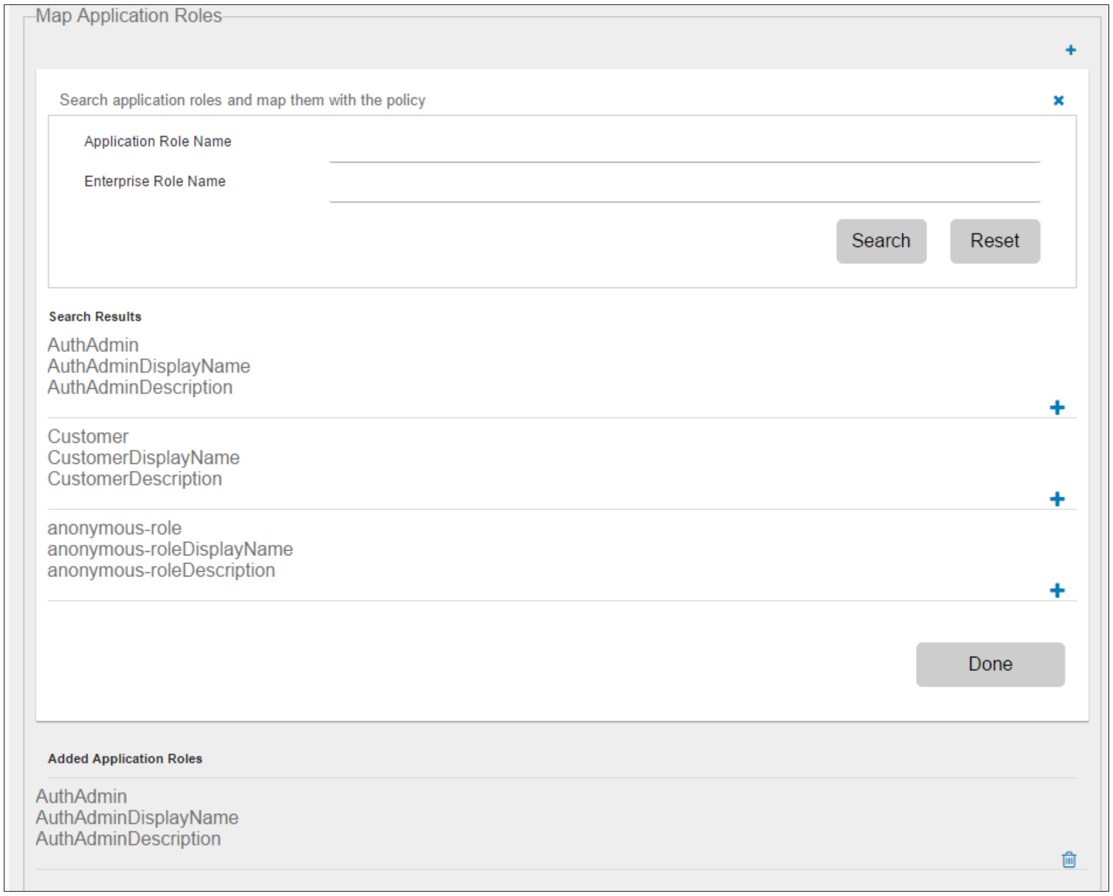
Using this option you can create a new policy.

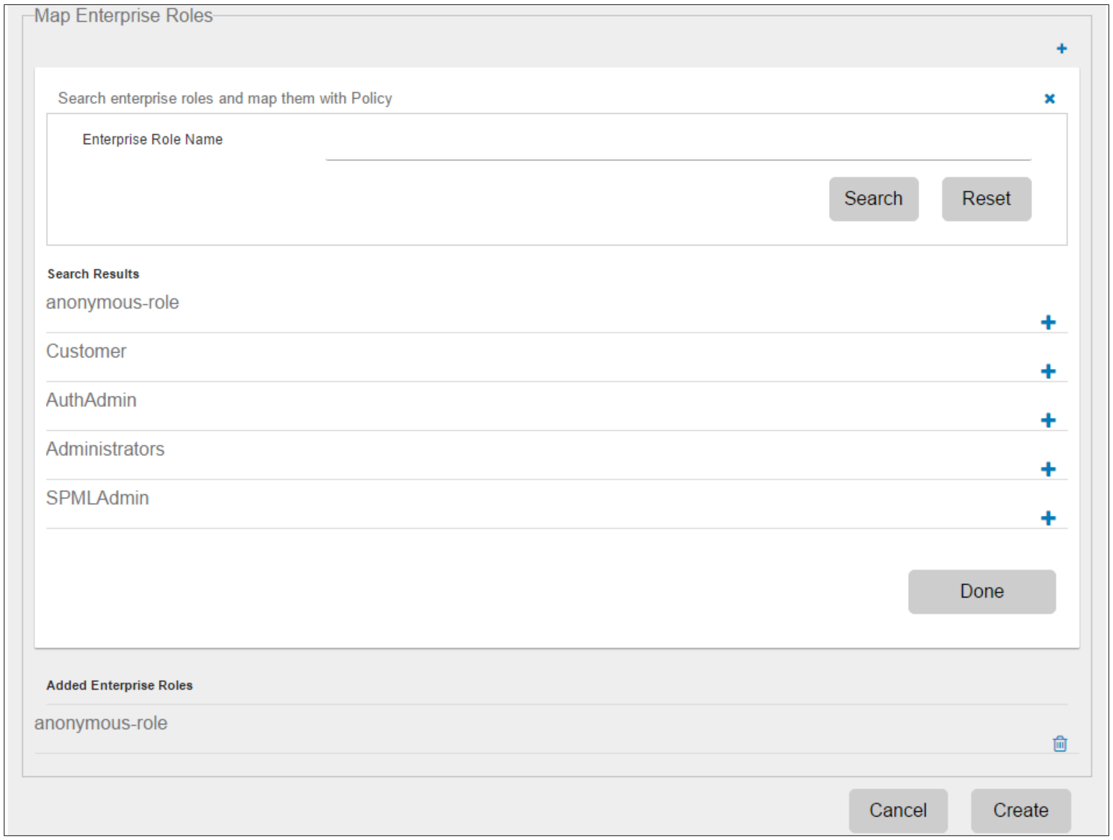
To create a new policy domain

1. In the **Policy Domain** section, click the required policy link. The **Authorization Policy** screen appears.
2. Click  . The **Create New Policy** screen appears.

Create New Policy



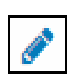

Map Application Roles
Search application roles and map them with the policy
Application Role Name
Enterprise Role Name
Search
Reset
Search Results
AuthAdmin
AuthAdminDisplayName
AuthAdminDescription
Customer
CustomerDisplayName
CustomerDescription
anonymous-role
anonymous-roleDisplayName
anonymous-roleDescription
Done
Added Application Roles
AuthAdmin
AuthAdminDisplayName
AuthAdminDescription



Field Description

Field Name	Description
Effect	Type of effect. The options can be: • Permit • Deny
Name	Type of effect. The options can be: • Permit • Deny
Description	The description of policy.
Map Resources	
Resource Type	Type of resources.
Resource Name	Name of the enterprise role.

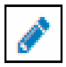
Field Name	Description
Map Entitlements	
Resource Name	Name of the resource.
Entitlement Name	Name of the entitlement.
Resource Name	Name of the resource.
Map Application Roles	
Application Role Name	Name of the entitlement.
Enterprise Role Name	Name of the resource.
Map Enterprise Roles	
Enterprise Role Name	Name of the entitlement.
Resource Name	Name of the resource.

3. In the **Effect** field, select the appropriate option.
4. In the **Name** field, enter the name of the policy.
5. In the **Description** field, enter the description of the policy.
6. In the **Map Resources** section, click .
7. The **Create New Policy** screen with expanded Map Resources section appears. Click **Search**.
8. The **Create New Policy – Map Resources** screen with search results appears. Select a resource to be mapped and click  .
9. Click **Done**. The **Create New Policy** screen with Added Resources section appears.
10. Repeat the steps 6 to 9 for **Map Entitlements**, **Map Application Roles** and **Map Enterprise Roles** section.
11. Click **Create**.
    OR
    Click **Cancel** to cancel the transaction.
12. The success message appears; click  if you want to edit the record.

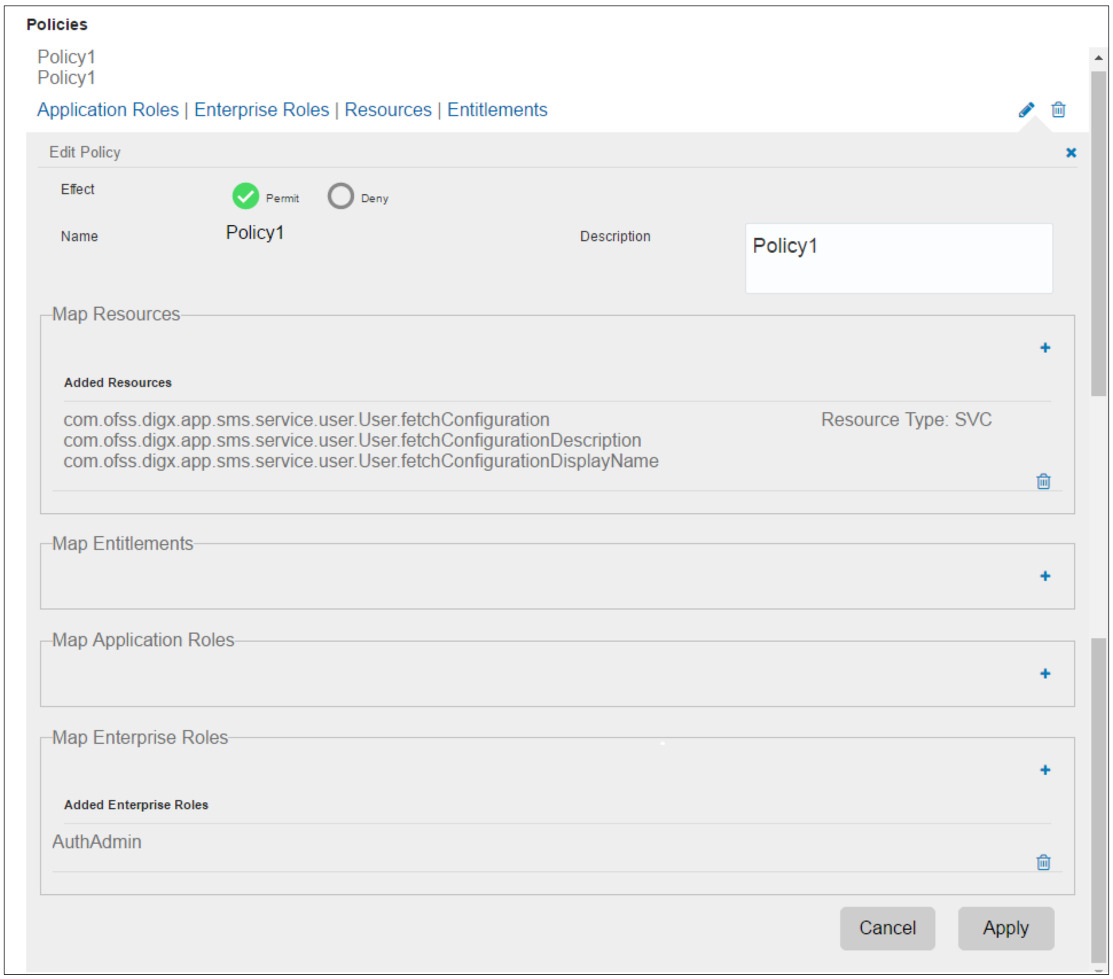
4.2.3 Edit Policy

Using this option you can edit or update the details of an existing policy.

To edit a policy:

1. Repeat step 2 of **Search Policy** section.
2. Click  of the record which you want to edit. The **Edit Policy** section appears.

Edit Policy



3. In the **Description** field, edit /update the description of the policy domain if required.
4. Update the **Map Resources**, **Map Entitlements**, **Map Application Roles** and **Map Enterprise Roles** section if required.
5. Click **Apply**.
   OR
   Click **Cancel** to cancel the transaction.

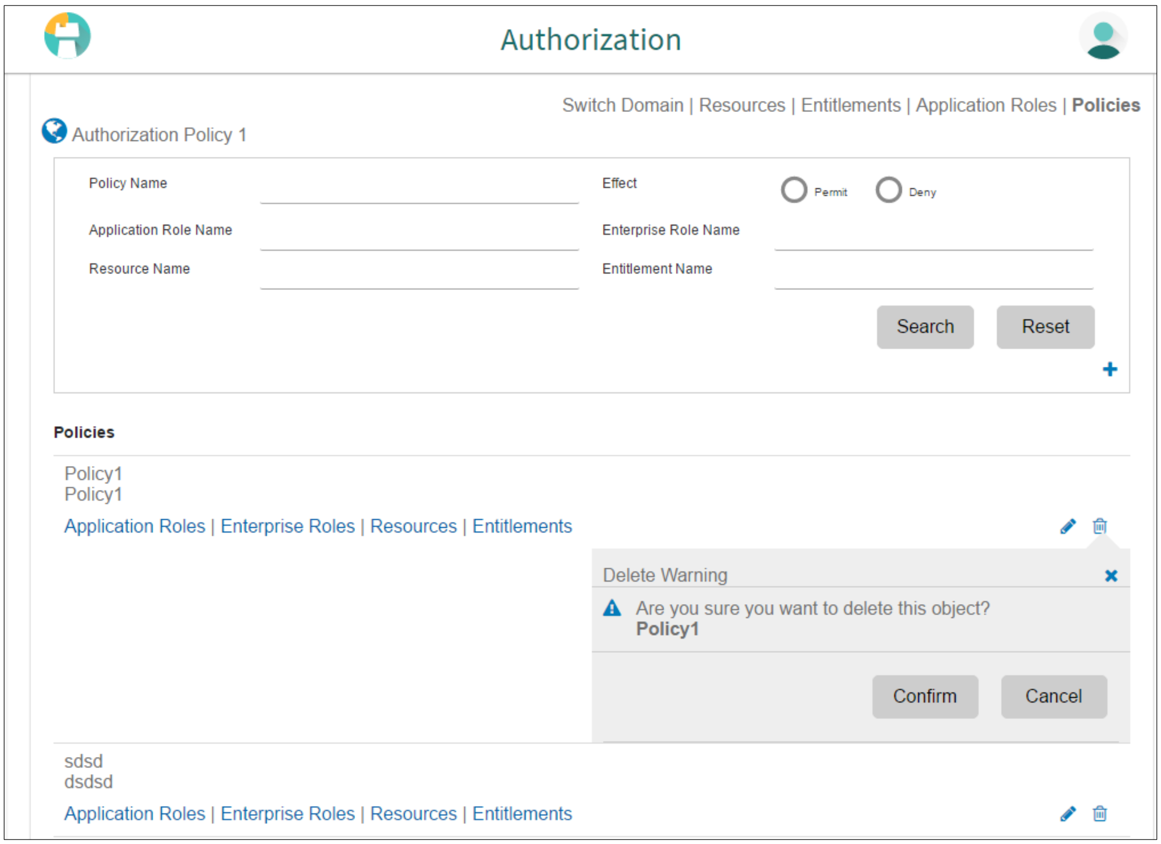
4.2.4 Delete Policy

Using this option you can delete an existing policy.

To delete a policy:

1. Repeat step 2 of **Search Policy** section.
2. Click  for the record which you want to delete. The Delete Warning message appears.

Delete Policy



3. Click **Confirm**.
4. The **Policy** screen with the successful object deletion message appears. Click Done to complete the transaction.

4.3 Application Resource

The bank administrator can search resource / resources, create a new resource, edit and delete the existing resource. Below are the types of available resources:

- Service
- Service Response
- UI Component
- Page

How to reach here:

Dashboard > Authorization > Resource

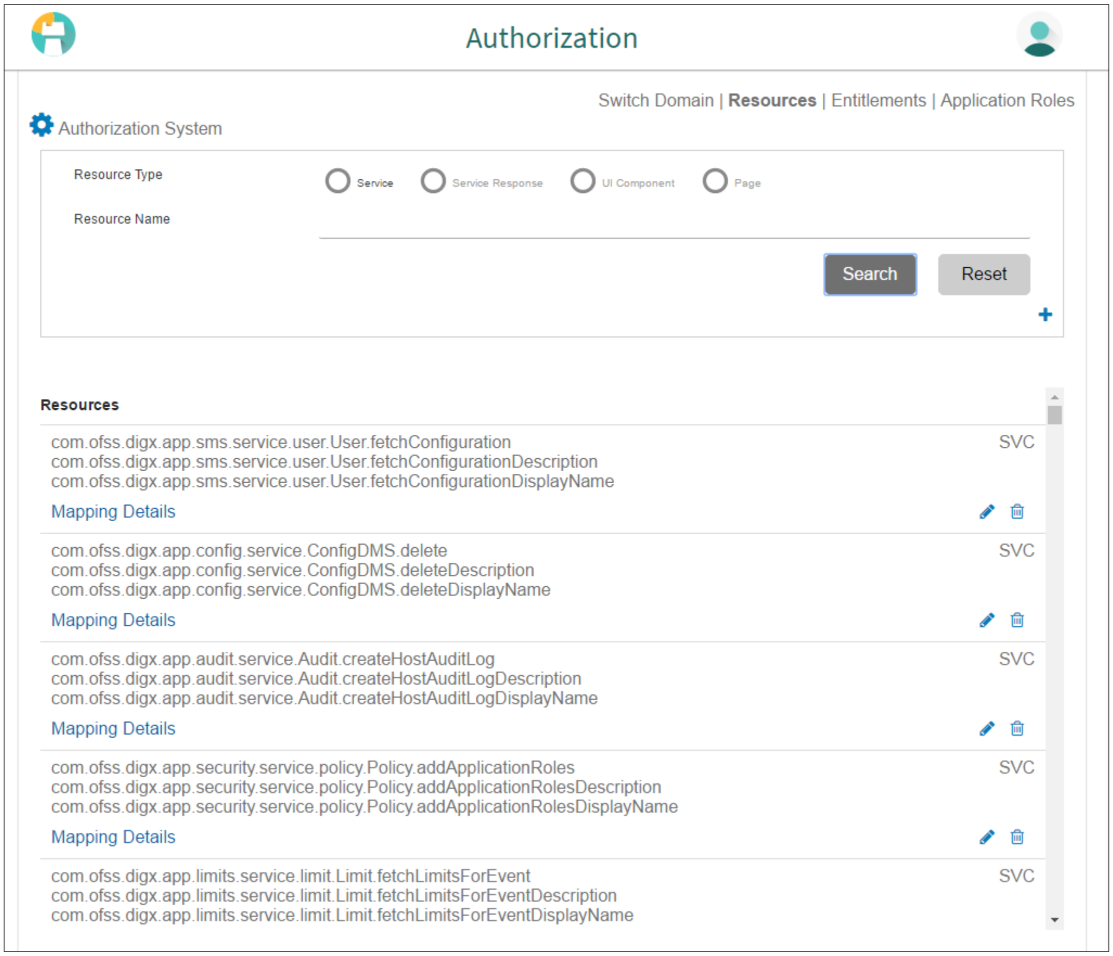
4.3.1 Search Resource

Using this option, you can search resource/ resources based on the search criteria. You can view the list of all the resources, if the search parameters are not specified.

To search resource/ resources:

1. In the **Authorization** screen, click the **Resources** link. The **Authorization System - Resources** screen appears.

Search Resource



Field Description

Field Name	Description
Search Users	
Resource Type	The type of resource. The options are: • Service • Service Response • UI Component • Page
Resource Name	Name of the resource.

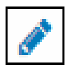
2. Click **Search**.

3. The **Authorization System** screen with search results appear based on the search parameters. Click **Reset** to reset the search parameters.

Search Resource - Search Results

Field Description

Field Name	Description
Resources	You can view the following resource details: • Resource Id • Resource Name • Resource Display Name • Resource Description

4. To edit a resource, click . The Edit Resource section appears.
5. To delete a resource, click . The Delete Warning message appears.
6. To view the mapping details, click the **Mapping Details** link.
7. The **Mapping Details** section appears. Perform the desired action.

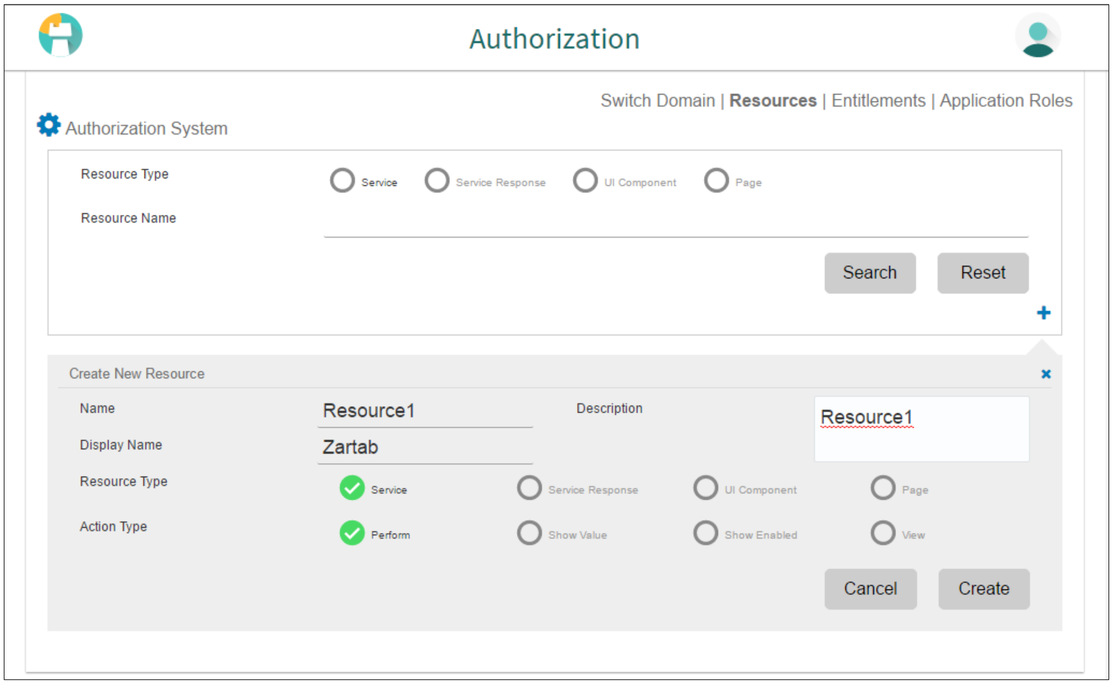
4.3.2 Create New Resource

Using this option, you can create a new resource.

To create a resource:

1. In the **Authorization System - Resources** screen, click . The **Create New Resource** screen appears.

Create New Resource



Field Description

Field Name	Description
Name	Name of the resource.
Description	Description of the resource.
Display Name	Display name or the resource.
Resource Type	Type of resource. The options are: • Service • Service Response • UI Component • Page
Action Type	Type of action. The options are: • Perform • Show Value • Show Enabled • View

2. In the **Name** field, enter the name of the resource.
3. In the **Description** field, enter the description of the resource.
4. In the **Display Name** field, enter the display name of the resource.
5. Click **Create**.
   OR
   Click **Cancel** to cancel the transaction.
6. The screen with success message appears; click if you want to edit the resource.

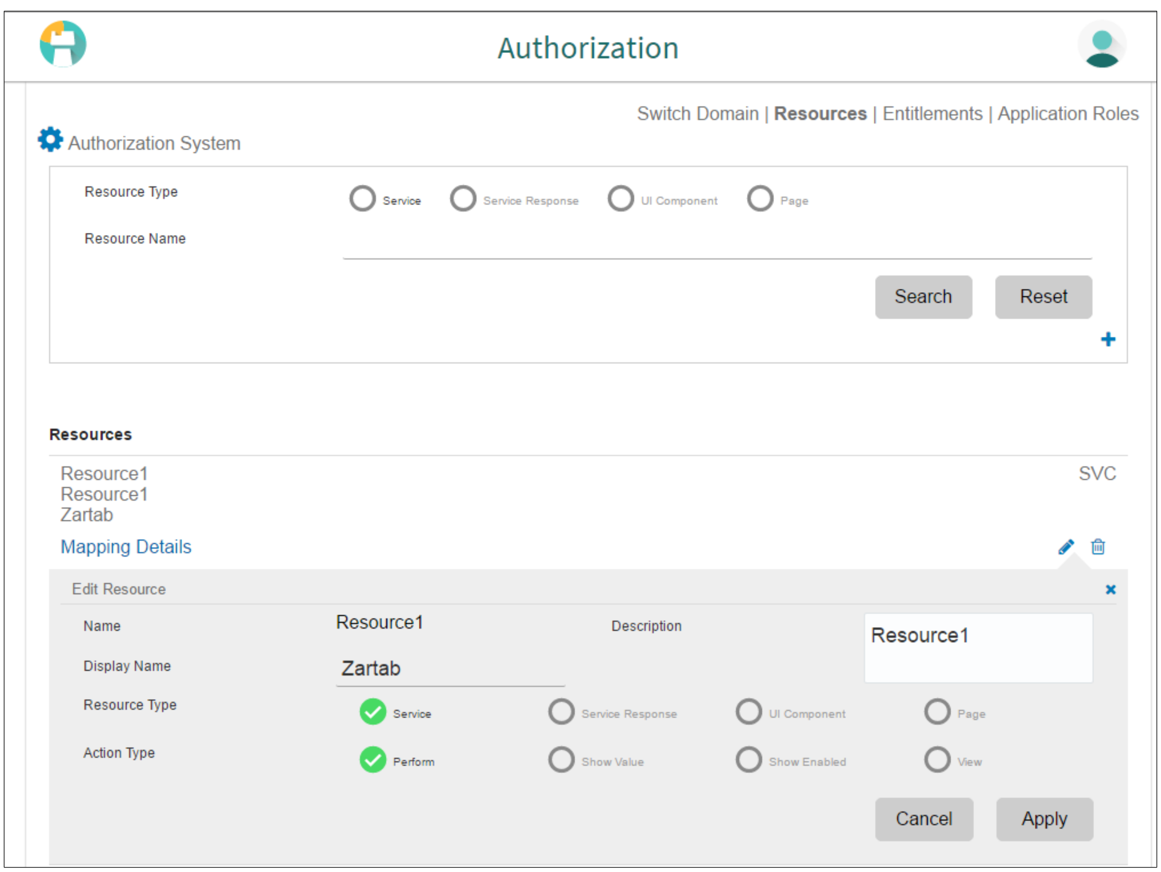
4.3.3 Edit Resource

Using this option you can edit or update the details of an existing resource.

To edit a resource:

1. Repeat step 2 of **Search Resource** section.
2. To edit a resource, select a record and click . The **Edit Resource** section appears.

Edit Resource



3. In the **Description** field, enter the description of the resource.
4. In the **Display Name** field, enter the display name of the resource.
5. Click **Apply**.
OR
Click **Cancel** to cancel the transaction.
6. The screen with success message appears. Click  if you want to delete the resource.

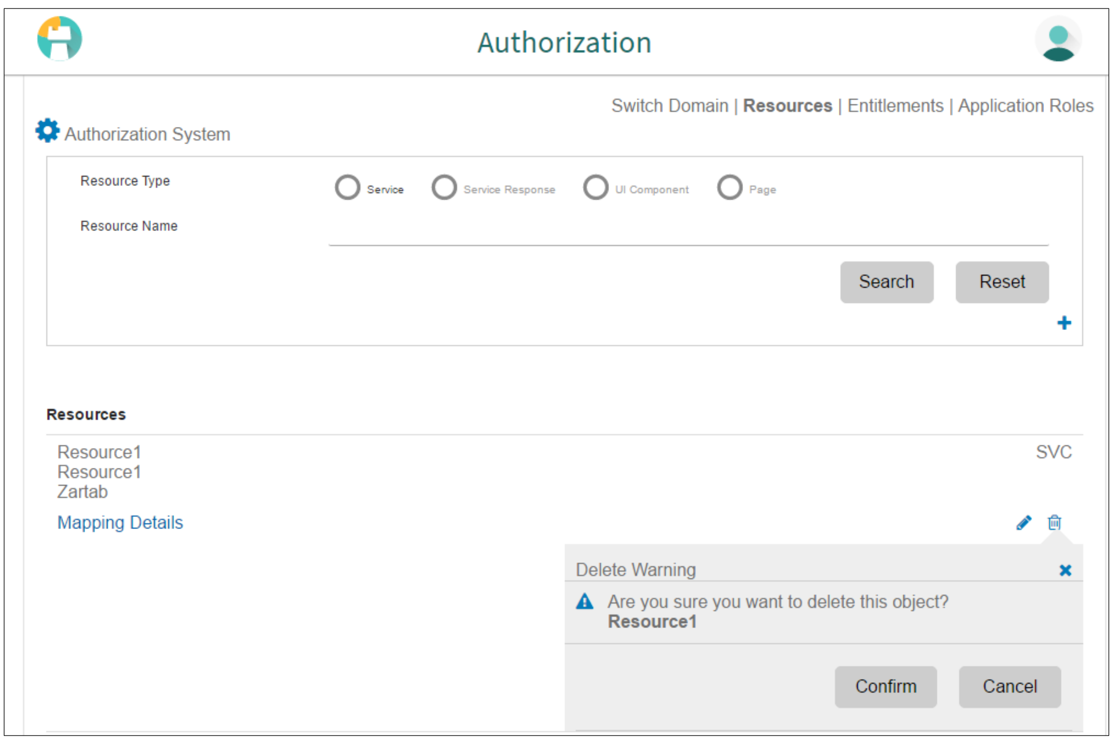
4.3.4 Delete Resource

Using this option, you can delete an existing resource.

To delete a resource:

1. Repeat step 2 of **Search Resource** section.

Delete Resource



2. To delete a resource, click .
3. The Delete Warning message appears. Click **Confirm.**
OR
Click **Cancel** to cancel the deletion process.
4. The **Resources** screen with the successful object deletion message appears. Click **Done** to complete the transaction.

FAQs

Who can create a resource?

Only bank administrator can create a resource.

What is a resource in Authorization System?

Resource in authorization system is a fully-qualified name of the service method.

How many types of resources can be created?

Currently only Service type of resource can be created.

4.4 Application Role

Using this option, you can search, create and edit the application roles.

How to reach here:

Dashboard > Authorization > Application Role

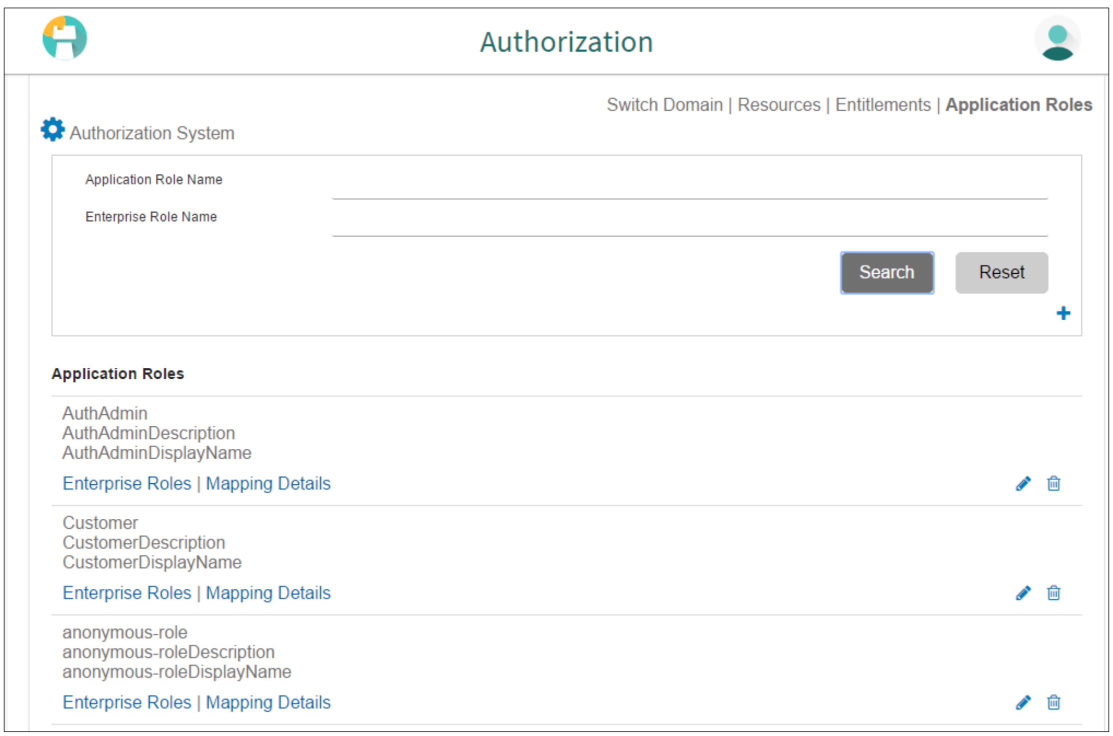
4.4.1 Search Application Role

Using this option, you can search application roles based on the search criteria. You can view the list of all the application roles, if the search parameters are not specified.

To search application role/ application roles:

1. In the **Authorization** screen, click the **Application Roles** link. The **Authorization System - Application Roles** screen appears.

Application Role



Field Description

Field Name	Description
Application Role Name	Name of the application role.
Enterprise Role Name	Name of enterprise.

2. Click **Search**.

3. The **Authorization System - Application Roles** screen with search results appears. Click Reset to reset the search parameters.

Search Application Roles - Search Results

Field Description

Field Name	Description
Application Roles	You can view the following application role details: • Application Role Name • Application Role Display Name • Application Role Description

4. Click . The **Edit Application Roles** section appears.
   OR
   Click . The Delete Warning message appears.
   OR
   Click **Mapping Details**. The **Mapping Details** section appears.

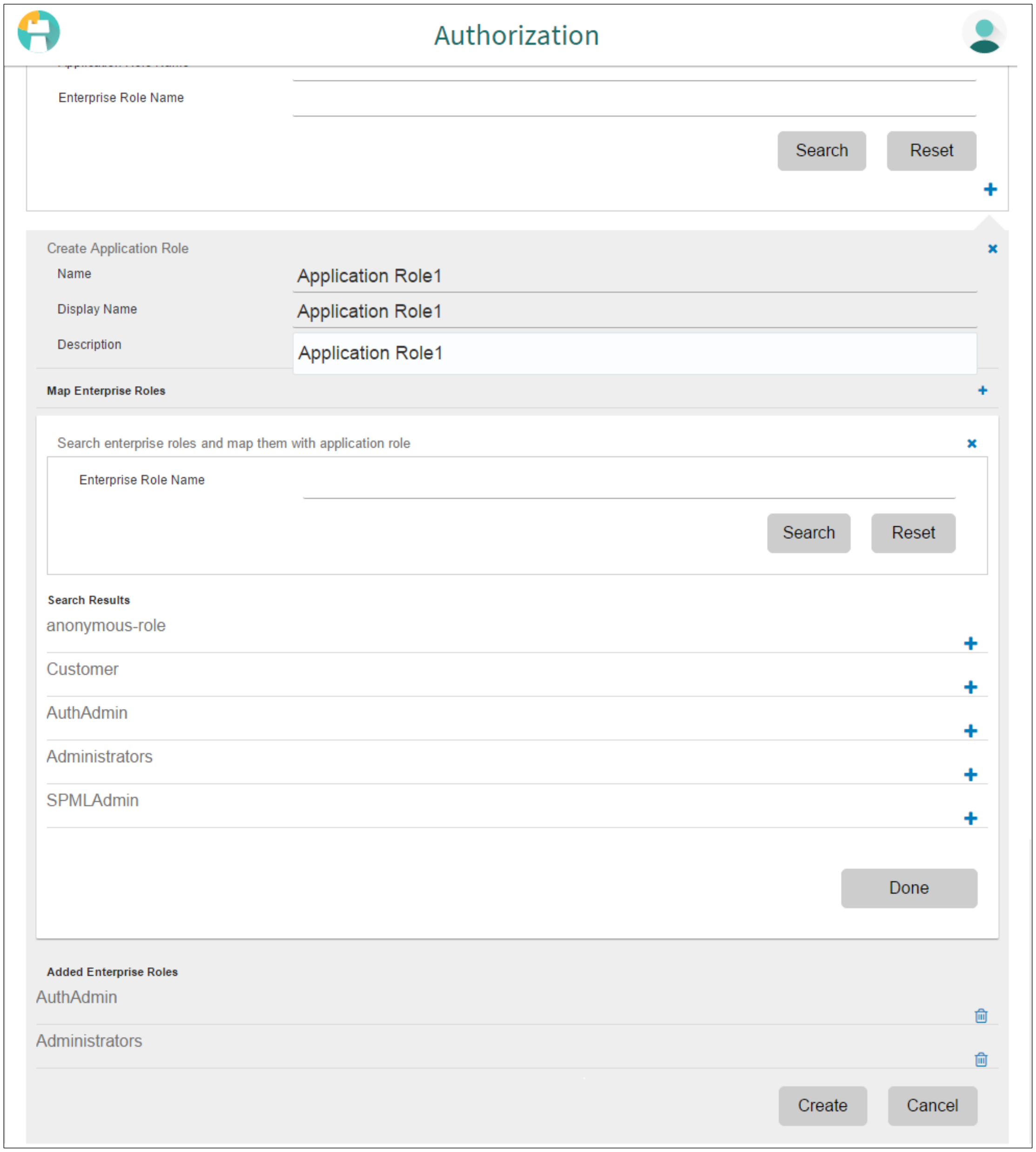
4.4.2 Create Application Role

Using this option you can create an application role.

To create a resource:

1. In the **Authorization System - Application Roles** screen, click . The **Create Application Role** screen appears.

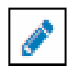
Create Application Role



Field Description

Field Name	Description
Name	Name of the application role.
Display Name	Display name of the application role.
Description	Description of the application role.
Map Enterprise Roles	

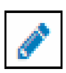
Field Name	Description
Enterprise Role Name	Name of the enterprise that is to be mapped to the application role.

2. In the **Name** field, enter the name of the application role.
3. In the **Display Name** field, enter the display name of the application role.
4. In the **Description** field, enter the description of the application role.
5. In the **Map Enterprise Roles** section, click . The **Map Enterprise Roles** section appears. Click **Search**.
6. The **Map Enterprise Roles** screen with search results appears, select an enterprise to be mapped and click .
7. Click **Done**. The mapped enterprise role appears in Added Enterprise Roles section.
8. Click **Create**.
   OR
   Click **Cancel** to cancel the transaction.
9. The screen with success message appears; click if you want to edit the record.

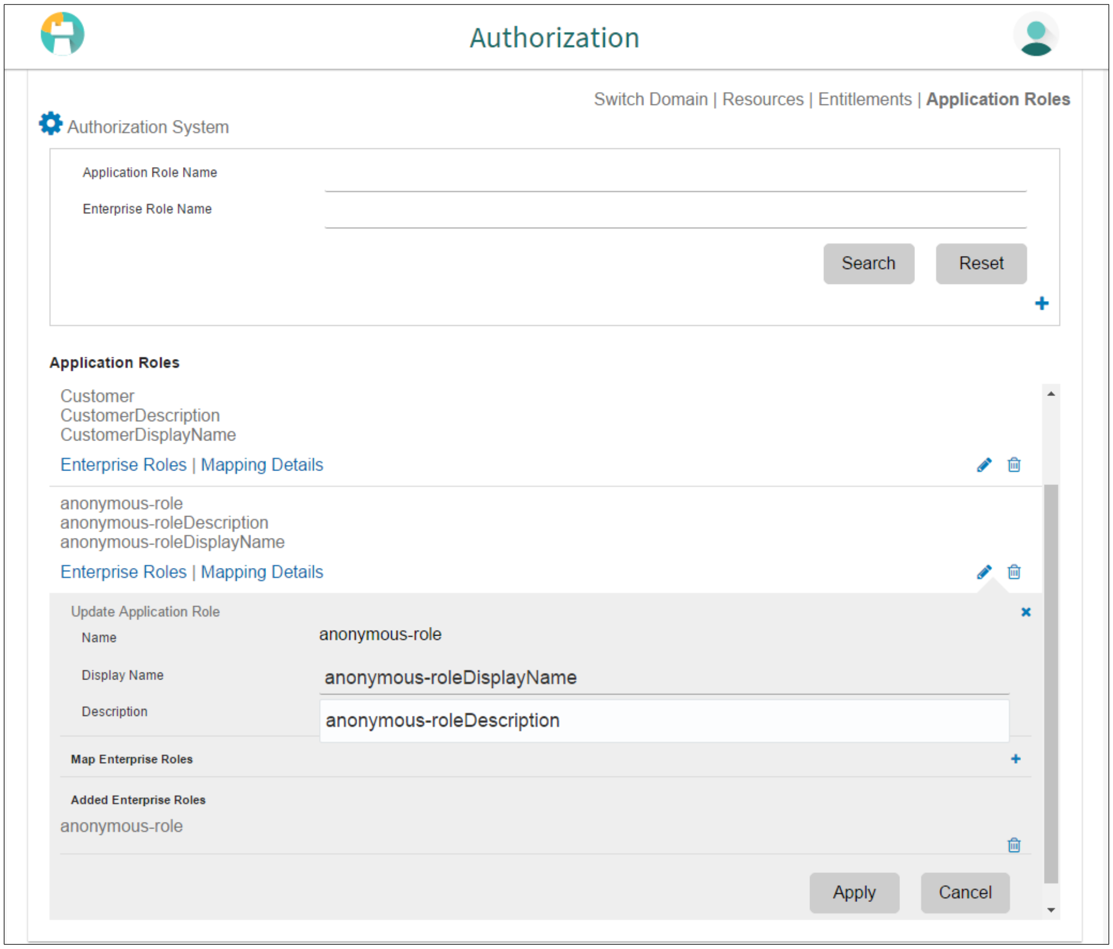
4.4.3 Edit Application Role

Using this option you can edit or update the details of an existing application role.

To edit an application role:

1. Repeat step 2 of **Search Application Role** section.
2. Click  of the record which you want to edit. The update application role section appears.

Update Application Role



3. In the **Display Name** field, enter the display name of the application role.
4. In the **Description** field, enter the description of the application role.
5. Click **Apply**.
   OR
   Click **Cancel** to cancel the transaction.
6. The screen with success message appears; click  if you want to delete the record.

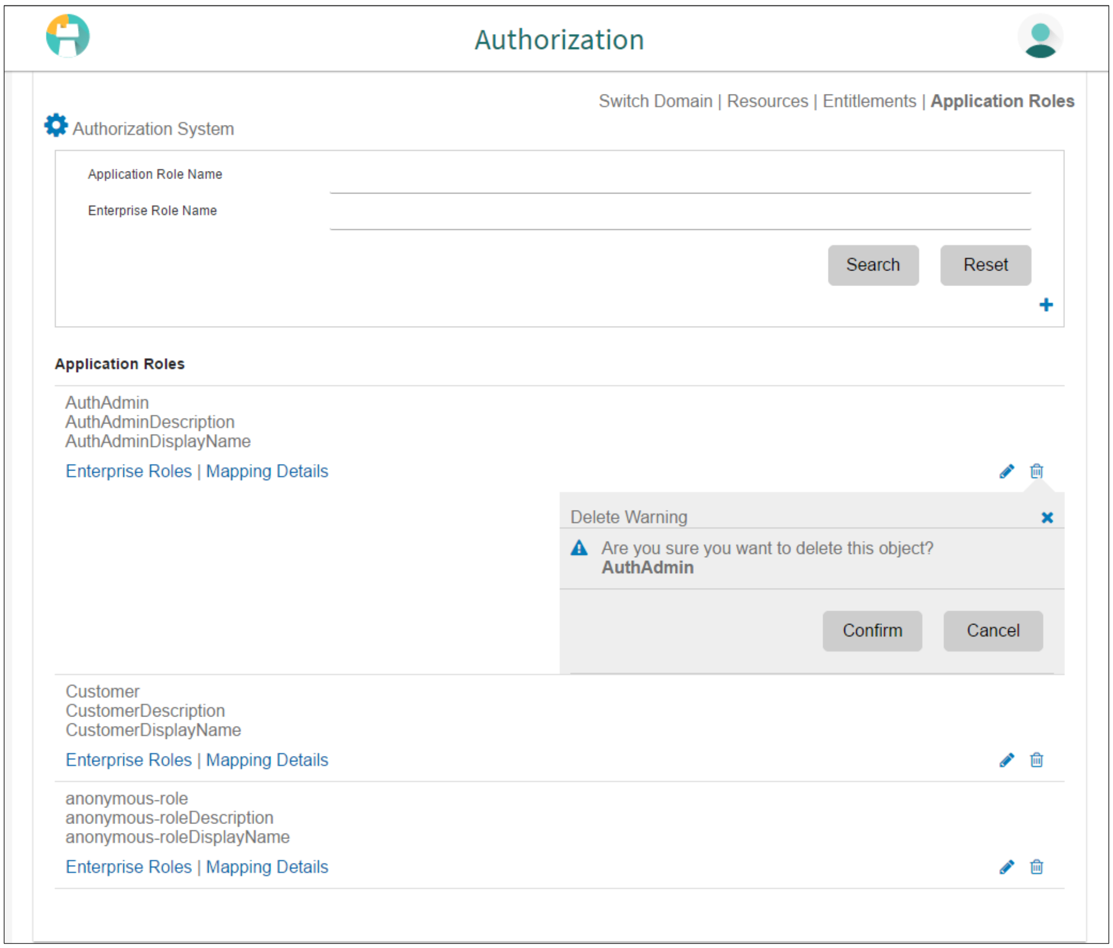
4.4.4 Delete Application Role

Using this option you can delete an existing application role.

To delete an application role:

1. Repeat step 2 of **Search Resource** section.
2. Click  for the record which you want to delete. The Delete Warning message appears.

Delete Application Role



3. Click **Confirm**.
4. The **Application Role** screen with the successful object deletion message appears. Click **Done** to complete the transaction.

4.5 Authorization - Entitlement

The Authorization system Entitlement allows the bank administrator to:

- Create Entitlement
- View Entitlement
- Edit Entitlement

How to reach here:

Dashboard > Authorization > Entitlement

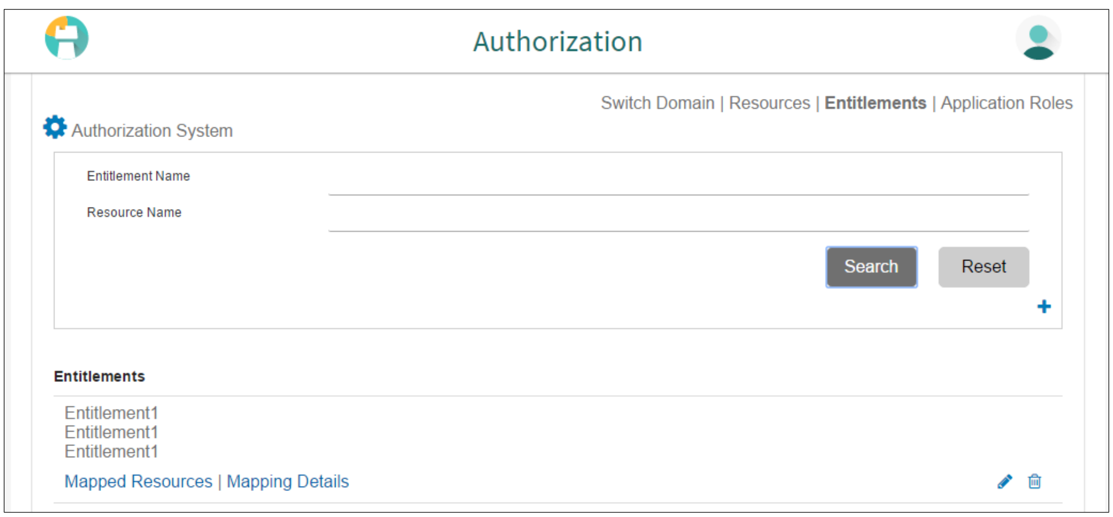
4.5.1 Search Entitlement

Using this option, you can search entitlement based on the search criteria. You can view the list of all the entitlements, if the search parameters are not specified.

To search entitlement/ entitlements:

1. In the **Authorization** screen, click the **Entitlement** link. The **Authorization System - Entitlement** screen appears.

Entitlement



Field Description

Field Name	Description
Check Group Roles to Assign or Remove	
Entitlement Name	Name of entitlement.
Resource Name	Name of the resource.

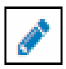
2. Click **Search**.

3. The **Authorization System - Entitlements** screen with search results appears. Click **Reset** to reset the search parameters.

Search Entitlement - Search Results

Field Description

Field Name	Description
Entitlement Name	You can view the following application role details: • Entitlement Name • Resource Name

4. Click . The **Update Entitlement** section appears.
OR
Click . The Delete Warning message appears.
OR
Click the **Mapping Details** link. The **Mapping Details** section appears.
OR
Click the **Mapping Resources** link. The **Resources** section appears.

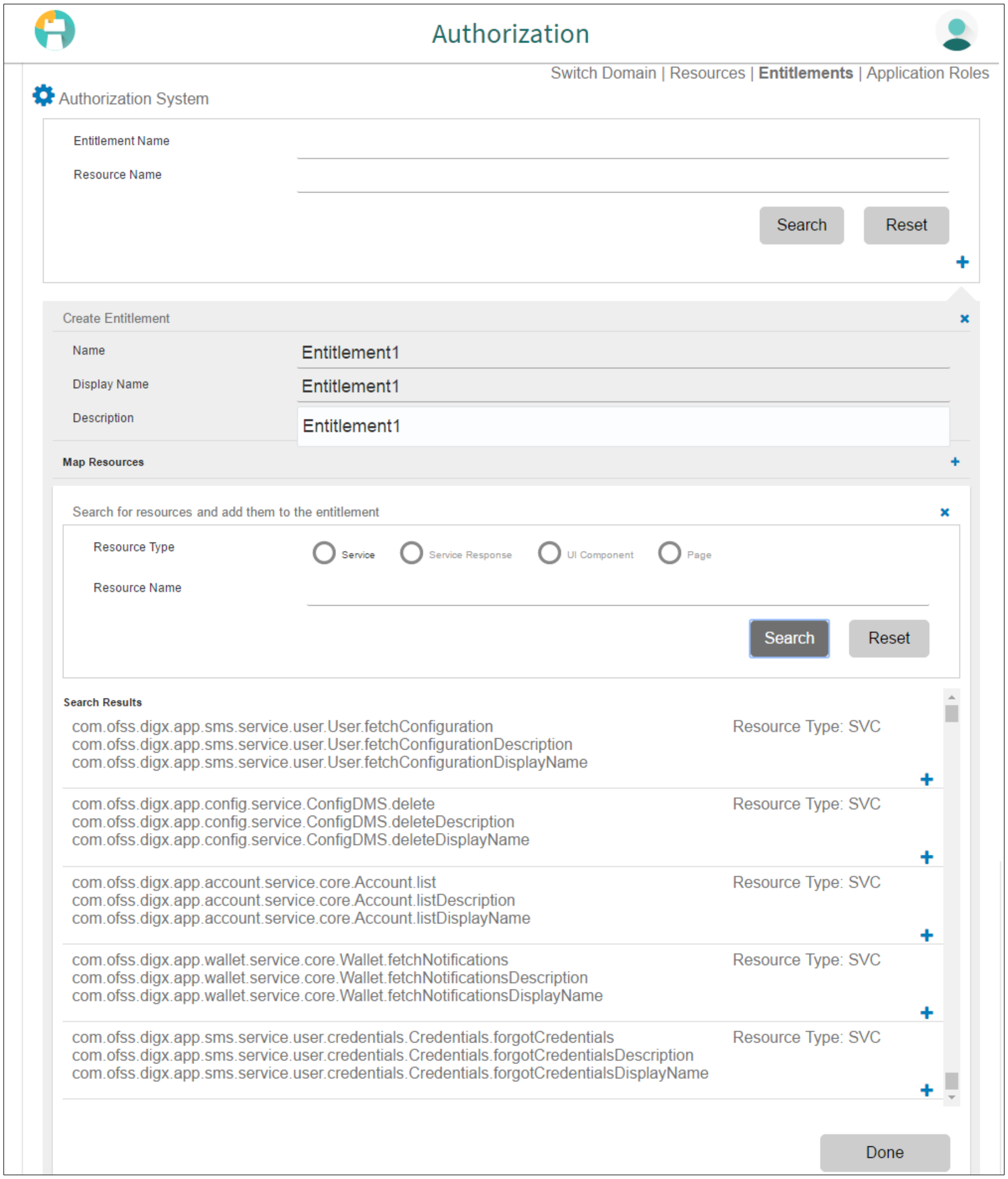
4.5.2 Create Entitlement

Using this option you can create a new Entitlement.

To create a new entitlement:

1. In the **Authorization System - Entitlement** screen, click . The **Create Entitlement** screen appears.

Create Entitlement



Field Description

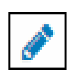
Field Name	Description
Name	Name of the entitlement.
Display Name	Display name of the entitlement.
Description	Description of the entitlement.

2. In the **Name** field, enter the name of the entitlement.
3. In the **Display Name** field, enter the display name of the entitlement.
4. In the **Description** field, enter the description of the entitlement.
5. In the **Map Resources** section, click . The **Map Resources** screen appears.

Create Entitlement - Map Resources

Field Description

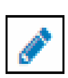
Field Name	Description
Resource Type	Type of resource. The options are: • Service • Service Request • UI Component • Page
Resource Name	Name of the resource to be mapped.

6. Click **Search**.
7. The **Map Resources - Search Results** screen appears, select a resource to be mapped and click .
8. The 'Resource Added' message appears. Click **Done**.
9. The mapped resources appear in Added Resources section. Click **Create**.
OR
Click **Cancel** to cancel the transaction.
10. The success message appears; click  if you want to edit the record.

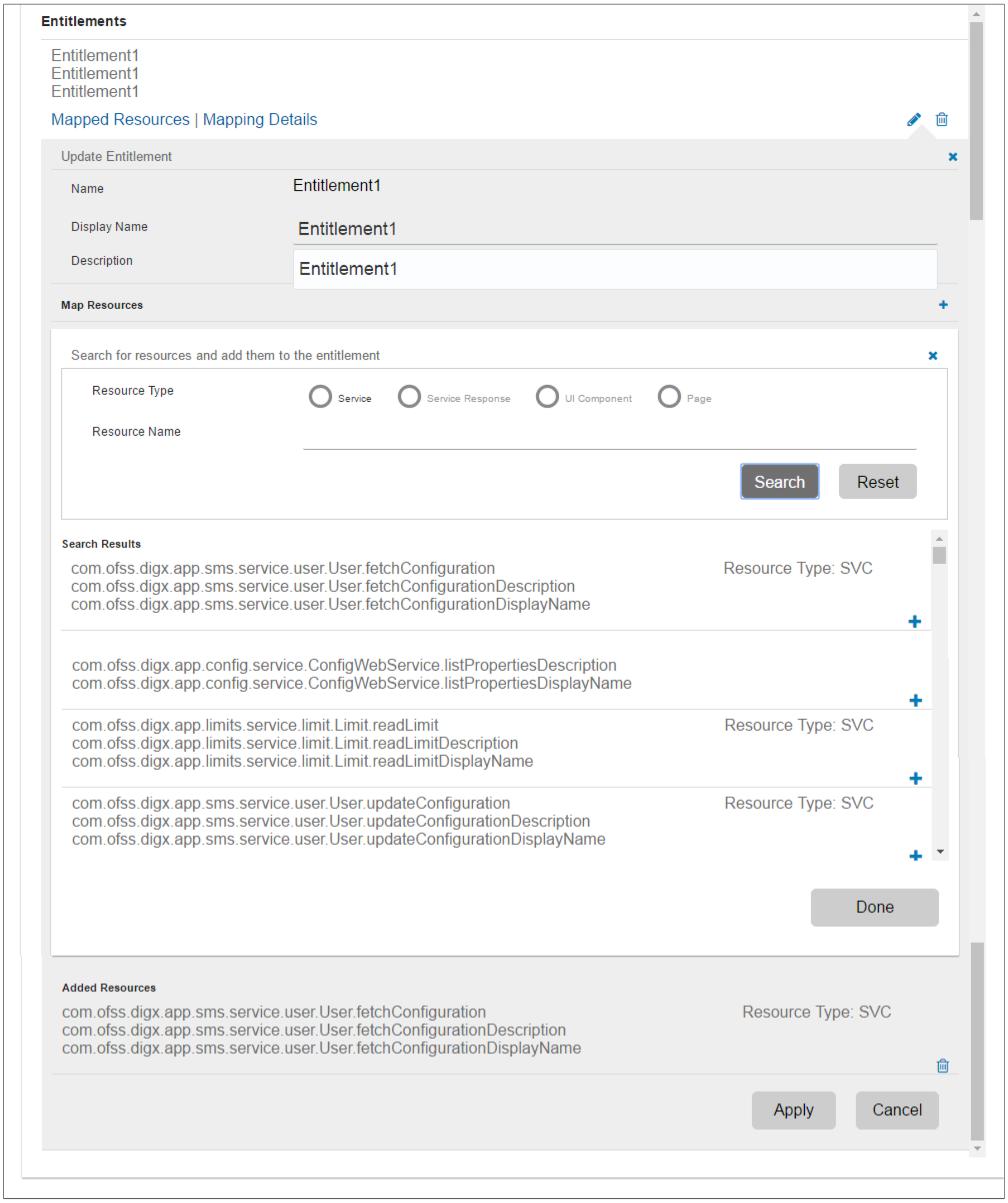
4.5.3 Edit Entitlement

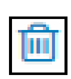
Using this option you can edit or update the details of an existing entitlement.

To edit an entitlement:

1. Repeat step 2 of **Search Entitlement** section.
2. Click  of the record which you want to edit. The **Update Entitlement** section appears.

Update Entitlement



3. In the **Display Name** field, enter the display name of the entitlement.
4. In the **Description** field, enter the description of the entitlement.
5. Click **Apply**.
   OR
   Click **Cancel** to cancel the transaction.
6. The screen with success message appears. Click  if you want to delete the record.

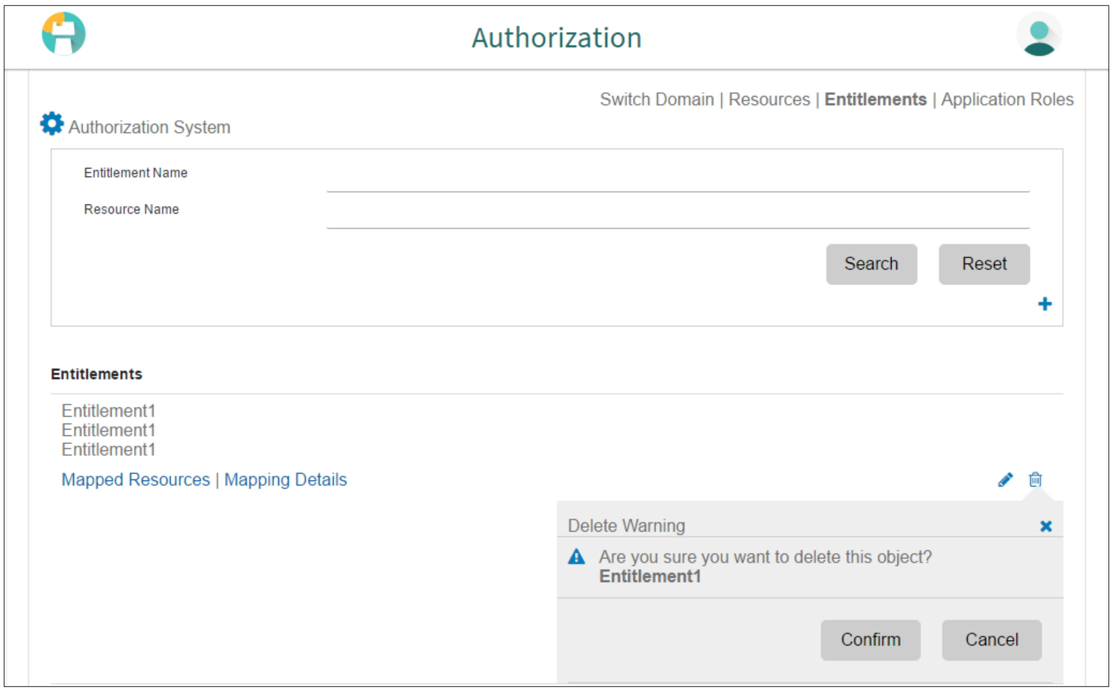
4.5.4 Delete Entitlement

Using this option you can delete an existing entitlement.

To delete an entitlement:

1. Repeat step 2 of **Search Resource** section.
2. Click  for the record which you want to delete. The Delete Warning message appears.

Delete Entitlement



3. Click **Confirm**.
4. The **Entitlements** screen with the successful object deletion message appears. Click **Done** to complete the transaction.

5. User Management

The User Management module allows the bank administrator to:

- Search User
- Create User
- Update User
- Delete User

How to reach here:

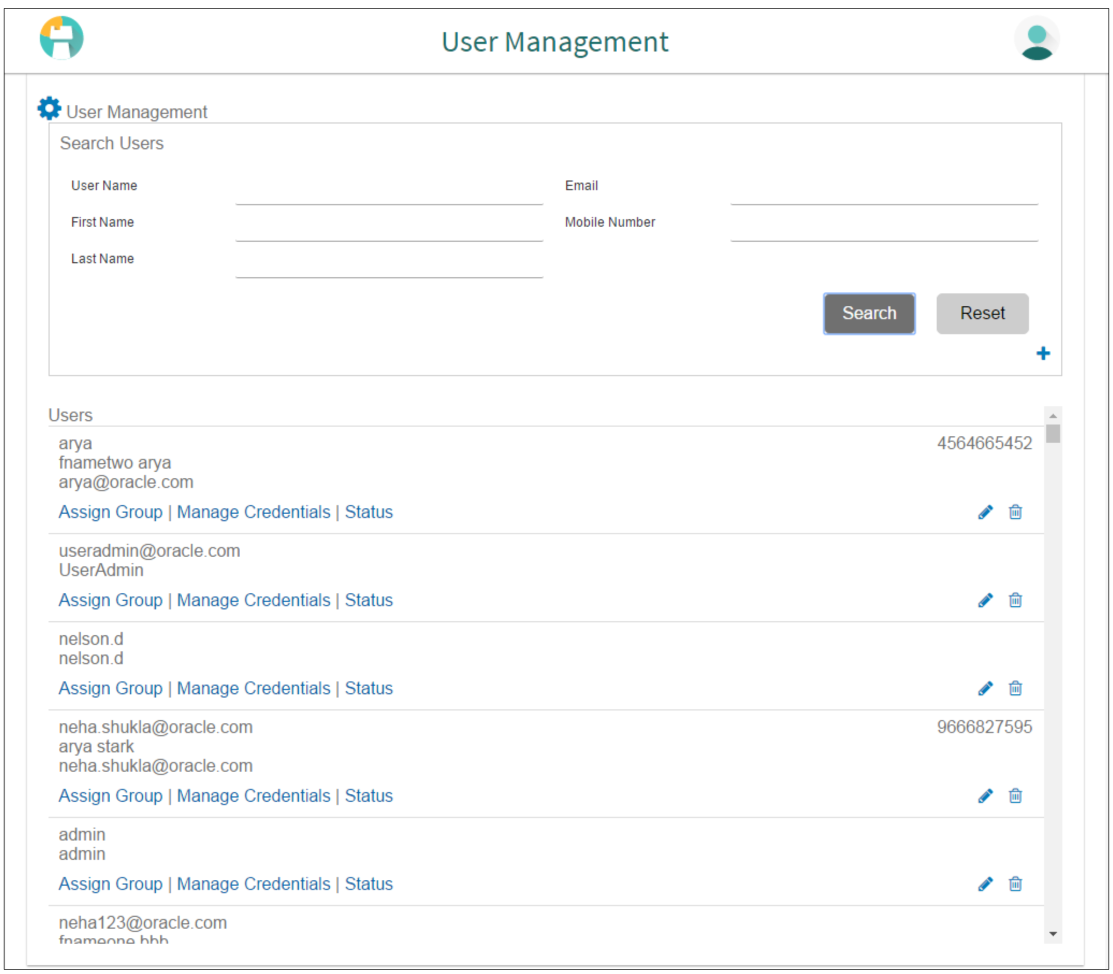
Dashboard > User Management

5.1 Search User

Using this option, bank administrators search the users. The search result displays a list of particular users based on different search parameters.

If the search parameters are not specified, then it displays all the records under the particular user type.

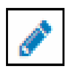
Search User



Field Description

Field Name	Description
Search Users	
User Name	Common name or user Id of the user.
First Name	First name or given name of the user.
Last Name	Last name/ surname of the user.
Email	Email id of the user.
Mobile Number	Mobile number of the user.

To search user:

1. Click **Search**.
2. The **User Management** screen with search results appears based on the search parameters. Click **Reset** if you want to reset the search parameters.
3. To edit a user, click . The **Update User** section appears.
4. To delete a resource, click . The Delete Warning message appears.
5. To assign group role to a user, click the **Assign Groups** link.
6. To handle the status of the user, click the **Status** link.
7. To manage the credentials of the user, click the **Manage Credentials** link.

5.2 Create User

Using this option, the bank administrator can create users. User can be created with or without password.

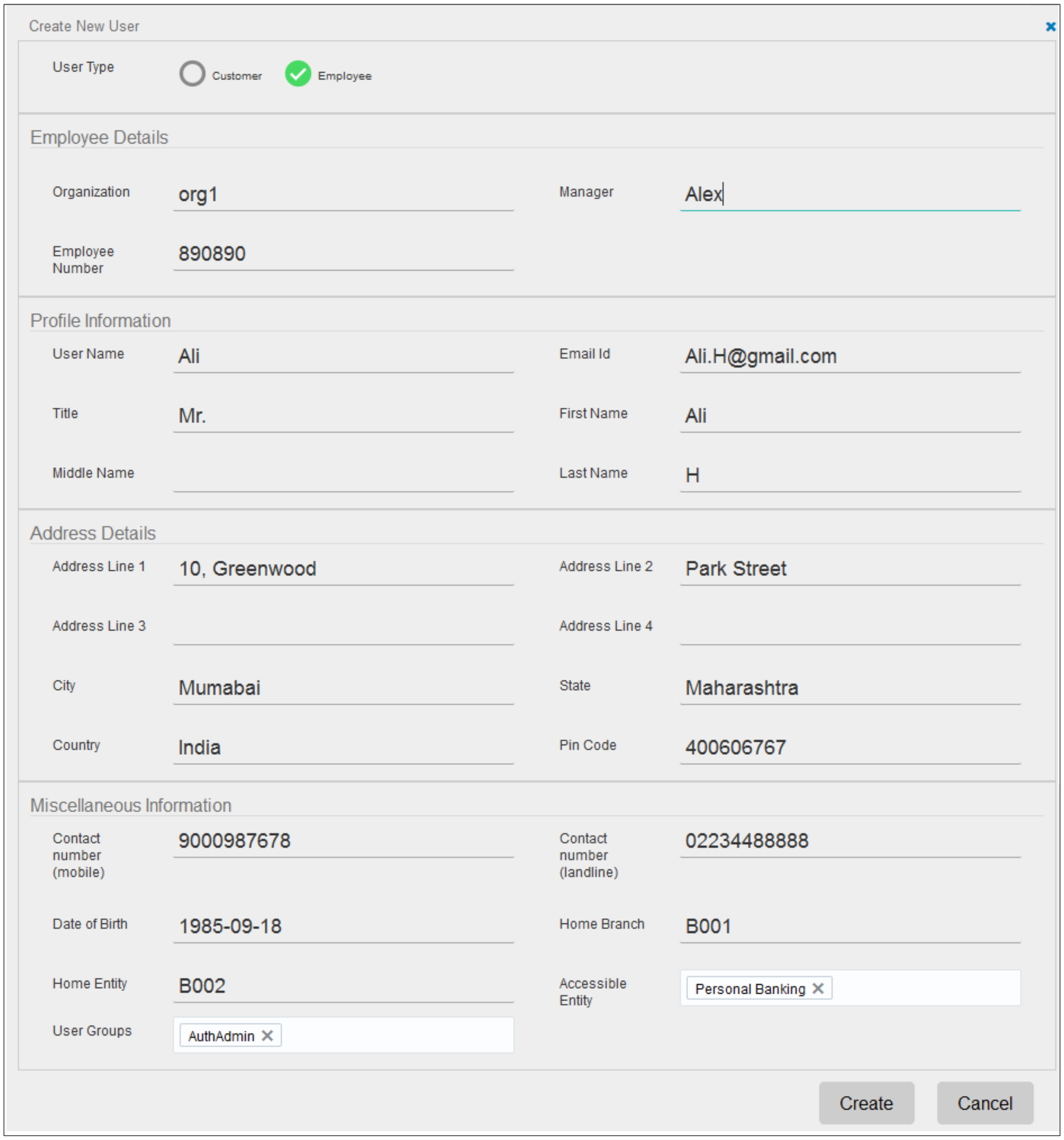
Two types of users are created:

- Customer - this involves, searching of party id and assigning the already mapped party details to the user.
- Employee - this involves configuring the entire profile details, address details and other miscellaneous information.

To create a user:

1. In the User Management screen, click . The **Create New User** screen appears.

Create New User



Field Description

Field Name	Description
User Type	Type of user. The options can be: • Customer • Employee

Employee Details

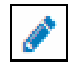
This section appears, if you select **Customer** option from **User Type** list.

Field Name	Description
Party ID	Party id assigned to the user.
Assigned Party ID	Displays the party id assigned to the user.
Employee Details	
This section appears, if you select **Employee** option from **User Type** list.	
Organization	Name of the organization.
Manager	Name or id of manager.
Employee Number	Employee id of the user.
Profile Information	
User Name	Common name or user id of the user.
Email Id	Email address of the user.
Title	Salutation to be used. The options are: • Mr • Mrs • Miss • Dr
First Name	First name or given name of the user.
Middle Name	Middle name of the user.
Last Name	Last name of the user.
Address Details	
Address Line 1,2	Address details for contact information of the user.
Address Line 3,4	Address details for contact information of the user.
City	City of residence of the user.
State	State of the user.
Country	Country of the user.
Pin Code	Zip code of the user.
Miscellaneous Information	

Field Name	Description
Contact number (mobile)	Mobile number of the user.
Contact number (land line)	Land line or residence number of the user.
Date of Birth	Date of birth of the user.
Home Branch	Home branch of the user
Home Entity	Home entity of the user.
Accessible Entity	Entities available to the user.
User Groups	User groups to be assigned.

2. From the **User Type** list, select the appropriate option.
   a. If you select **Customer** option:
      i. In the **Party Id** field, enter the party id.
      ii. Click **Fetch Details**. The application fetches the mapped details.
      iii. In the **User Name** field, enter the user id of the user.
      iv. In the **Home Branch** field, enter the home branch of the user.
      v. In the **Home Entity** field, enter the home entity of the user.
      vi. From the **Accessible Entity** list, select the appropriate option.
      vii. From the **User Groups** list, select the appropriate group to be assigned.
   b. If you select **Employee** option:
      i. In the **Employee Number** field, enter the six digit employee number of the user.
      ii. In the **User Name** field, enter the user id of the user.
      iii. In the **Email Id** field, enter the email id of the user.
      iv. In the **Title** field, enter the title of the user.
      v. In the **First Name** field, enter the first name of the user.
      vi. In the **Last Name** field, enter the last name of the user.
      vii. In the **Address Line1-4** field, enter the address of the user.
      viii. In the **Country** field, enter the country of the user.
      ix. In the **Pin Code** field, enter the pin code of the user.
      x. In the **Contact number (Mobile)** field, enter the mobile number of the user.
      xi. In the **Contact number (Land line)** field, enter the land line number of the user.
      xii. In the **Date of Birth** field, enter the appropriate date.
      xiii. Repeat steps iv to vii of step 2 a.

3. Click **Create**.
   OR
   Click **Cancel** to cancel the transaction.

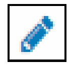
4. The **Create User** screen with success message appears. Click , if you want to update the user details.

5.3 Update User

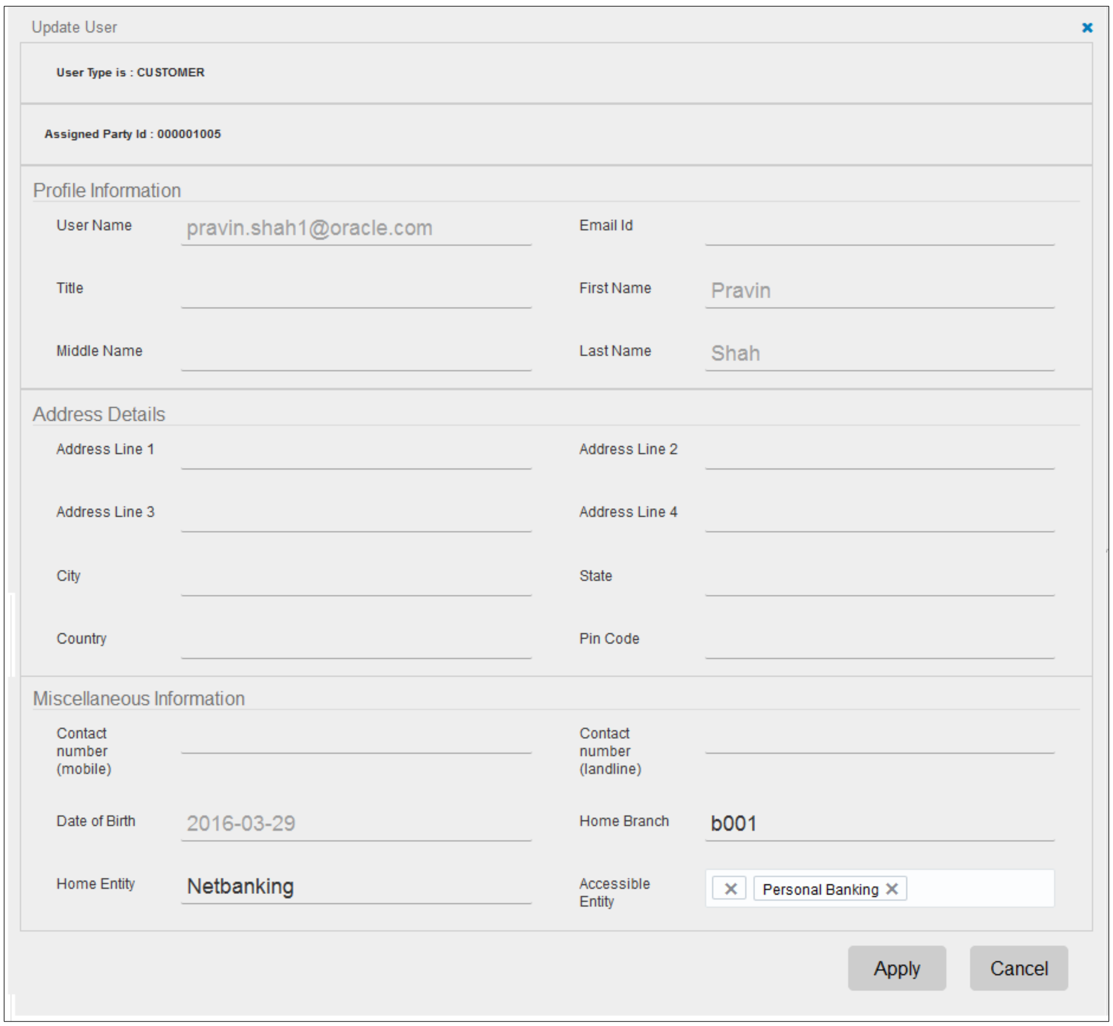
Using this option, you can update or edit the details of a particular user. These details are based on the information configured by you, while creating the user.

To edit or update a user details:

1. Repeat step 1 of Search User section.

2. To edit a user, select a record and click . The Update User section appears.

Update User



Field Description

Field Name	Description
User Type	Type of user. • Customer • Employee
Assigned Party ID	Party id assigned to the user. This field appears for the Customer type of user.
Profile Information	
User Name	Common name or user id of the user.
Email Id	Email address of the user.
Title	Salutation to be used. The options are: • Mr • Mrs • Miss • Dr
First Name	First name or given name of the user.
Middle Name	Middle name of the user.
Last Name	Last name of the user.
Organization	Name of the organization. This field appears for the Employee type of user.
Manager	Name or id of manager. This field appears for the Employee type of user.
Employee Number	Employee id. This field appears for the Employee type of user.
Address Details	
Address Line 1,2	Address details for contact information of the user.
Address Line 3,4	Address details for contact information of the user.
City	City of residence of the user.
State	State of the user.

Field Name	Description
Country	Country of the user.
Pin Code	Zip code of the user.
Miscellaneous Information	
Contact number (Mobile)	Land line or residence number of the user.
Contact number (Land line)	Date of birth of the user.
Date of Birth	Home branch of the user.
Home Branch	Home entity of the user.
Home Entity	Entities available to the user.
Accessible Entity	Entities available to the user.

3. In the **Home Branch** field, enter the home branch of the user.
4. In the **Home Entity** field, enter the home entity of the user.
5. From the **Accessible Entity** list, select the appropriate option.

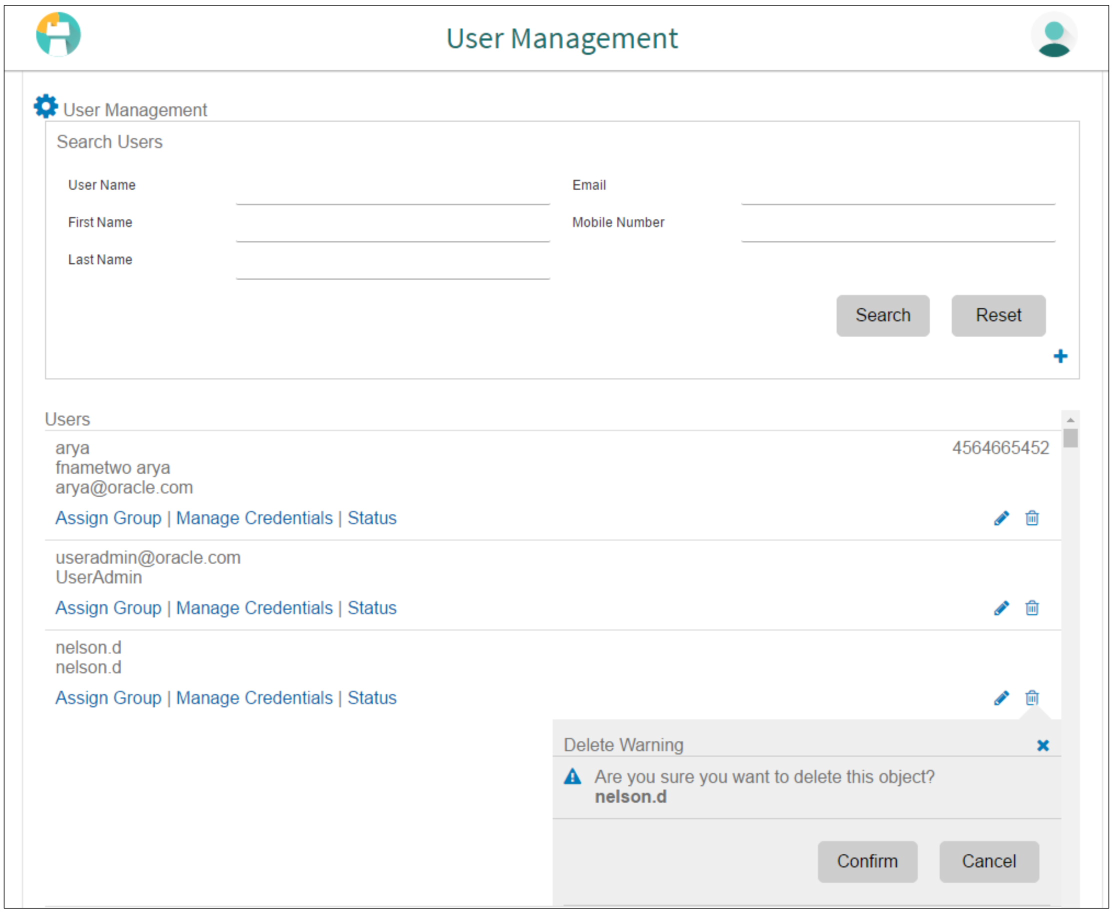
5.4 Delete User

Using this option you can delete an existing user.

To delete a user:

1. Repeat step 1 of **Search User** section.
2. To delete a user, click . The Delete Warning message appears.

Delete User



3. Click **Confirm**.
4. The **User Management** screen with the successful object deletion message appears. Click **Done** to complete the transaction.

FAQs

Who can create / update the user?

Only bank administrator can create a user and edit its details.

Which user information can I update using Update User screen?

Using the Update User screen you can update the profile information, address details and miscellaneous information except the User Name and Email id.

What is home entity and accessible entity?

Home entity is the default business unit mapped to the user. It can be various types of banking products and features bank customers are availed of. For example, net banking, wealth banking, personal banking etc. Accessible Entity is the list of all the available business units to the customer.

5.5 Assign Groups

Using this option, you can assign /remove roles to a user, to add /remove the user from a group. You can select the group roles that you want to assign to the user.

Note: You can assign more than one role to a user by selecting the check boxes.

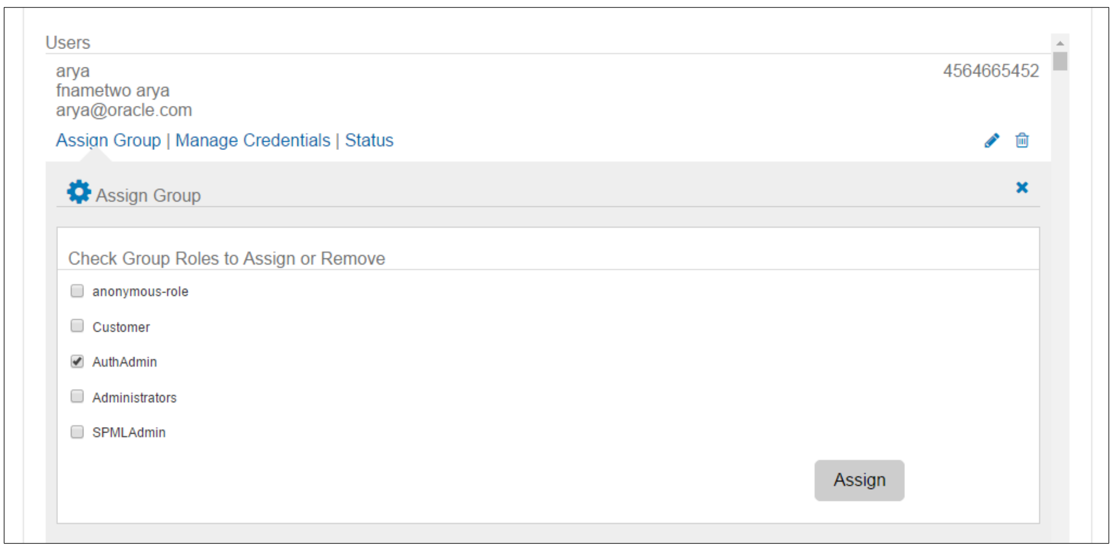
How to reach:

Dashboard > User Management > Search User > Assign Groups

To assign a group:

1. In the **User Managemen**t screen, click **Search**. The search result section appears.
2. Select the desired user and click the **Assign Group** link. The **Assign Group** section appears.

Assign Group



Field Description

Field Name	Description
Check Group Roles to Assign or Remove	
Group Roles	The group roles to be assigned to the user.

3. To assign or remove the roles, select or deselect the **Group Roles** check boxes.
4. Click **Assign**.
5. The success message appears. Click **Done** to complete the transaction.

FAQs

Why users need to assign to a group?

A user is assigned to a group to set access rights. The user is grouped under specific group level like admin group user, customer group user etc.

Can more than one role be assigned to a user?

Yes more than one role can be assigned to the user; in that case the user belongs to more than one group.

5.6 Manage Credentials

The bank administrator manages the credential related operations such as:

- Reset Password - allows to reset the log in password
- Change Password - authenticates user with the current password and then changes the log in password.

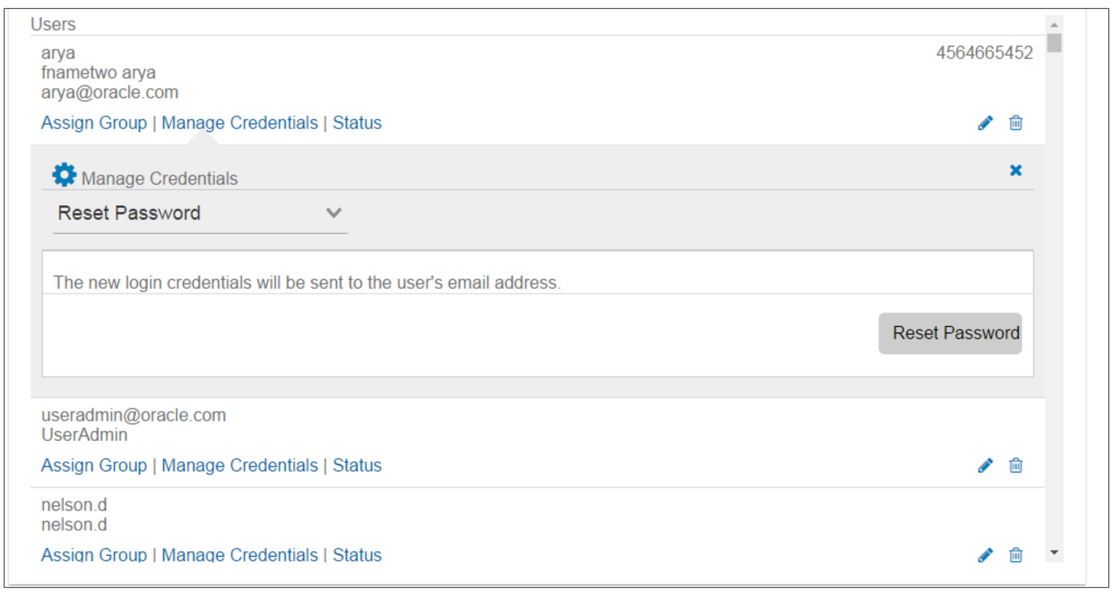
How to reach here:

Dashboard > User Management > Search User > Manage Credentials

To manage credentials:

1. In the **User Management** screen, click **Search**. The search result section appears.
2. Select the desired user and click the **Manage Credentials** link. The **Manage Credentials** section appears.

Manage Credentials



Field Description

Field Name	Description
Manage Credentials	Manages credential related operations. The options are: • Reset Password • Change Password

3. From **Manage Credential** list, select the appropriate option.
   a. If you select **Reset Password** option:
      i. From the **Account Verification Questions** list, select the appropriate question.
      ii. In the **Answer** field, enter the appropriate answer of the selected security question.
      iii. Click **Reset Password**.
   b. If you select **Change Password** option:
      i. In the **Enter Current Password** field, enter the current password.
      ii. In the **Enter New Password** field, enter the new password.
      iii. In the **Confirm New Password** field, re-enter the new password to confirm.
      iv. Click **Change Password**.
      v. The success message appears. Click **Done** to complete the transaction.

5.7 Status

Using this option, you can modify and manage the locked and activated statuses of a particular user.

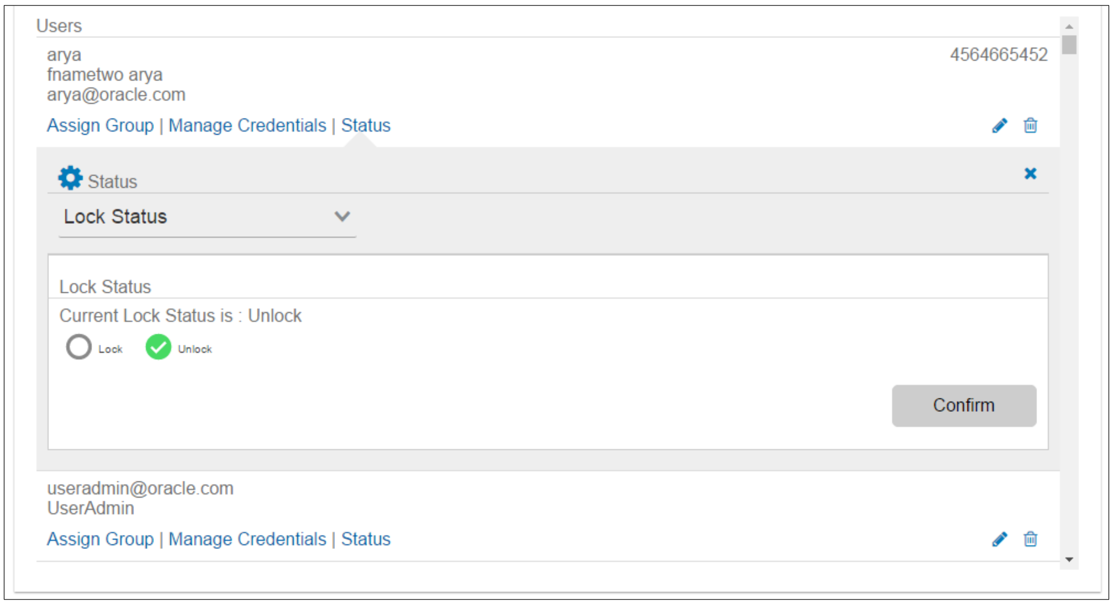
How to reach here:

Dashboard > User Management > Search User > Status

To change the user status:

1. In the **User Management** screen, click **Search**. The search result section appears.
2. Select the desired user and click the **Status** link. The **Status** section appears.

Status



Field Description

Field Name	Description
User Status	The current status of the user. The user can either be Activated or Deactivated.
Lock Status	The current status of the user. The status can be: • Lock • Unlock

4. In the **User Status** field, select the appropriate option.
5. In the **Lock Status** field, select the appropriate option.
6. Click **Confirm**.
7. The success message appears. Click **Done** to complete the transaction.

6. Limits Maintenance

The Limit Maintenance module allows the bank administrator to create limits package for specific transaction type.

These limit packages defines the minimum and maximum amount values per transaction as well as maximum and minimum number of transactions that can be initiated per day.

Using this you can perform the following actions:

- Create Limit Package
- View Limit Package
- Edit Limit Package

How to reach here:

Admin Dashboard > *Limits*

6.1 Create Limit Group

Using this option, bank administrator can create a limit group based on the details given as per the fields.

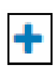
How to reach here:

Admin Dashboard > *Limits* > *Limits Group*

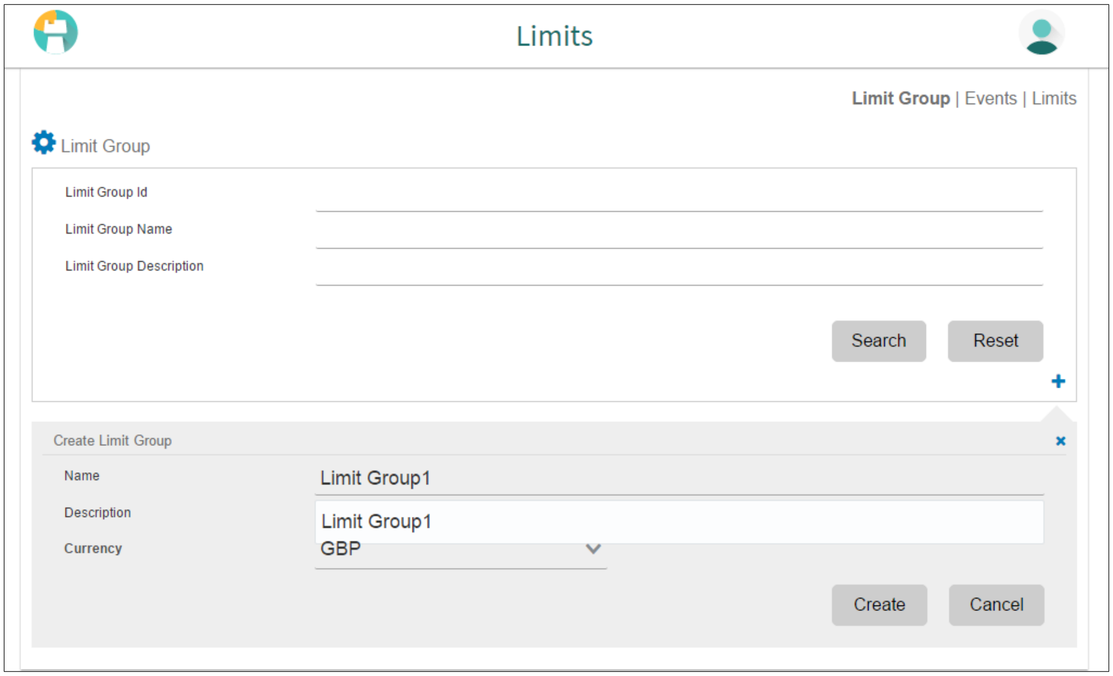
Field Description

Field Name	Description
Name	Name of the limit group.
Description	Description of the limit group.
Currency	Currency of the limit group.

To create a limit group:

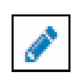
1. In the **Limit Group** screen, click . The **Create Limit Group** screen appears.

Create Limit Group



Field Description

Field Name	Description
Name	Name of the limit group.
Description	Description of the limit group.
Currency	Currency of the limit group.

2. In the **Name** field, enter the name of the limit group.
3. In the **Description** field, enter the description of the limit group.
4. From the **Currency** list, select the appropriate currency.
5. Click **Create**.
   OR
   Click **Cancel** to cancel the transaction.
6. The **Create Limit Group** screen with success message appears. Click , if you want to update the user details.

6.2 View Limit Group

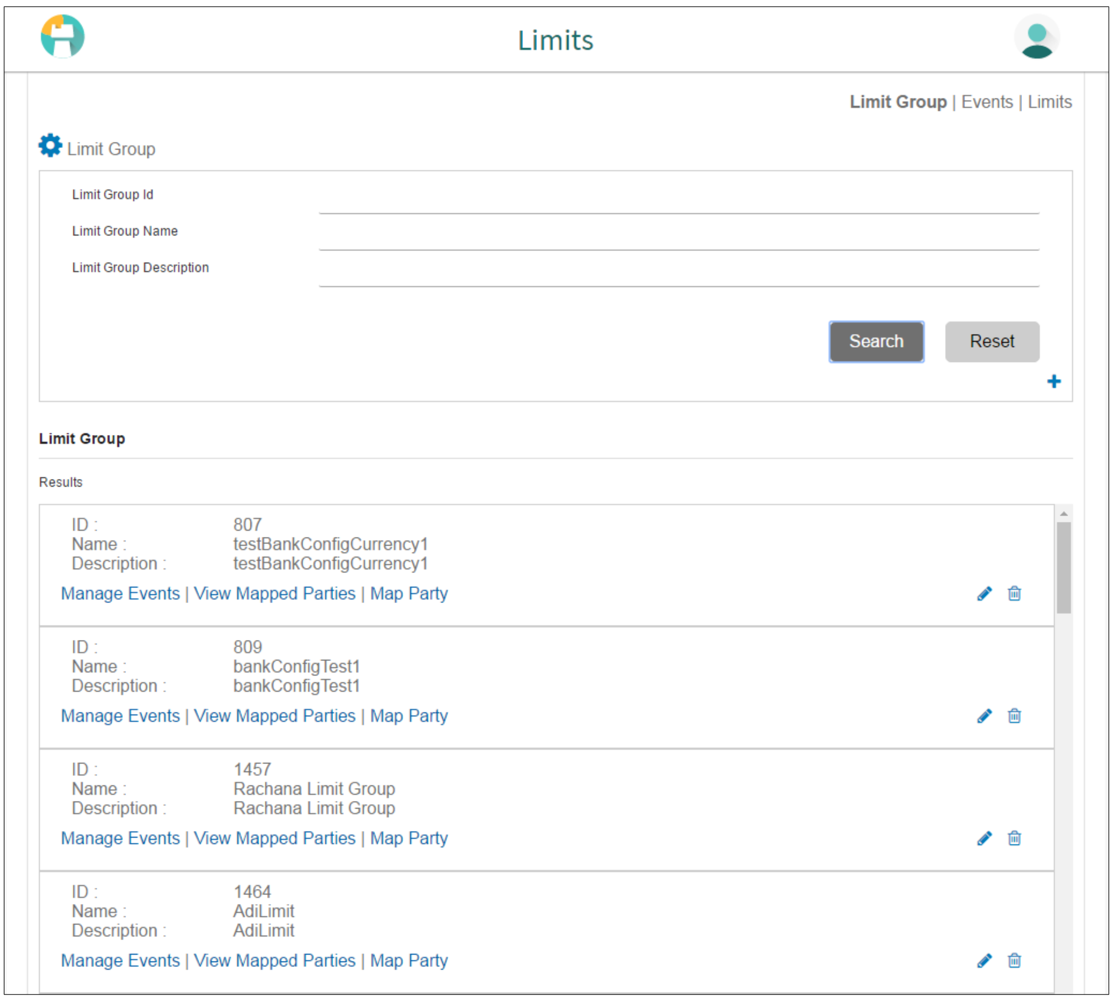
Using this option, bank administrator can search for particular limit groups based on different search parameters. The search results displays a list or particular limit group based on different search filters selected. Panel size depends on the number of limit group in the search list meeting the search filter criteria.

If the search parameters are not specified, records of all the limits maintained in the application are displayed.

How to reach here:

Admin Dashboard > Limits > Limits Group

Search Limit Group



Field Description

Field Name	Description
Limit Group ID	The unique Id to search the specific limit group.
Limit Group Name	The name of the limit group.

To search a limit group:

1. Click **Search**. The **Limit Group** screen with search results appears based on the searched criteria.
   OR
   Click **Reset** to reset the search parameters.
2. To view the details of a specific limit package, click the record. The **Limit Group** screen appears.
3. To view the events details, click the **Manage Events** link.
   OR
   To map parties, click **Map Party** link.
   OR
   To view mapped parties details, click **View mapped Parties** link.

6.2.1 Manage Events

Using this option bank administrator, search and view the events.

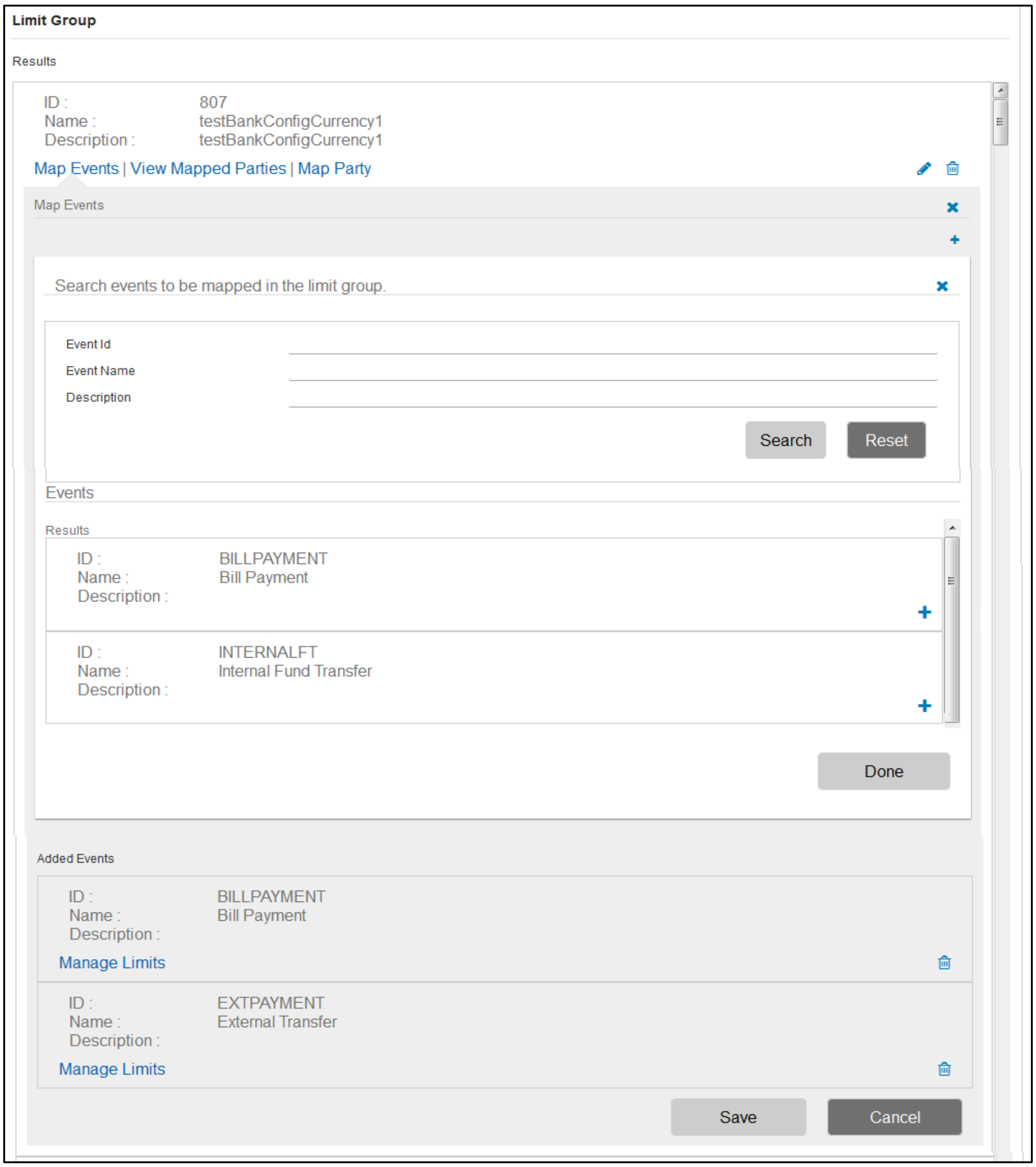
How to reach here:

Admin Dashboard > Limits > Limits Group > Manage Events

To manage events:

1. In the **Limit Group** screen, click **Search**. The search result section appears.
2. Select the desired limit group and click the **Manage Events** link. The **Manage Events** section appears.

Limits Group – Manage Events



Field Description

Field Name	Description
Event Id	Id of event.
Event Name	Name of event.
Event Description	Description of event.

3. In the **Map Events** section, click .
4. The **Map Events** section expanded, click **Search**.
5. The **Map Events** section with search results appears, select an event to be mapped and click .
6. The success message of ‘Events Added’ appears. Click **Done** to complete the Event mapping.
7. In the **Added Events** section, select desire **Event.** And click the **Manage Limits** link to manage limits for respective Event.
8. The **Manage Limits** section appears. click to search for limits to be mapped.
9. The **Manage Limits** section expanded, click **Search**.
10. In the Search Results section, select a limit to be mapped and click and click .
11. The success message of ‘Limits Added’ appears. Click **Done** to complete the mapping.
12. Click **Save**.
    OR
    Click **Cancel** to cancel the transaction.
    The success message appears.

6.2.2 View Mapped Parties

Using this option bank administrator, search and view the mapped parties.

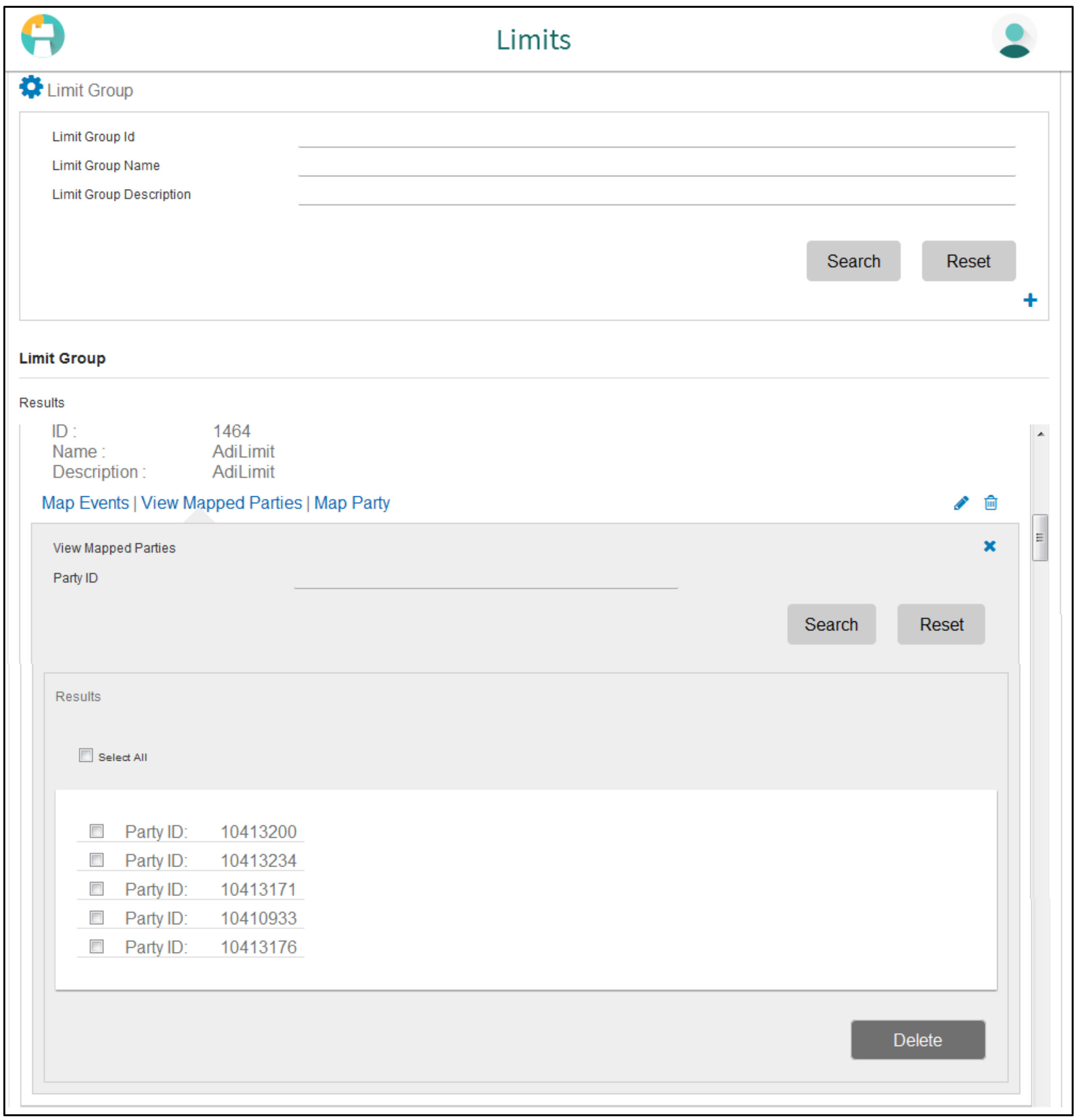
How to reach here:

Admin Dashboard > Limits > Limits Group > View Mapped Parties

To view the mapped parties:

1. In the **Limit Group** screen, click **Search**. The search result section appears.
2. Select the desired limit group and click the **View Mapped Parties** link. The **View Mapped Parties** section appears.

Limits Group – View Mapped Parties



Field Description

Field Name	Description
Party Id	Id of the party
Results	
Select All	Check box to select all the records.
Party Id	Id of the party.

3. In the **Party ID** field, enter the party id to be search for that limit group.
4. Click **Search**.
5. The **View Mapped Parties Map Events** screen with search results appears based on the searched criteria. Click Reset to reset the search parameters.

Note: You can select a party id and delete a record.

6.2.3 Map Party

Using this option, bank administrator can open Map Party panel and map a party.

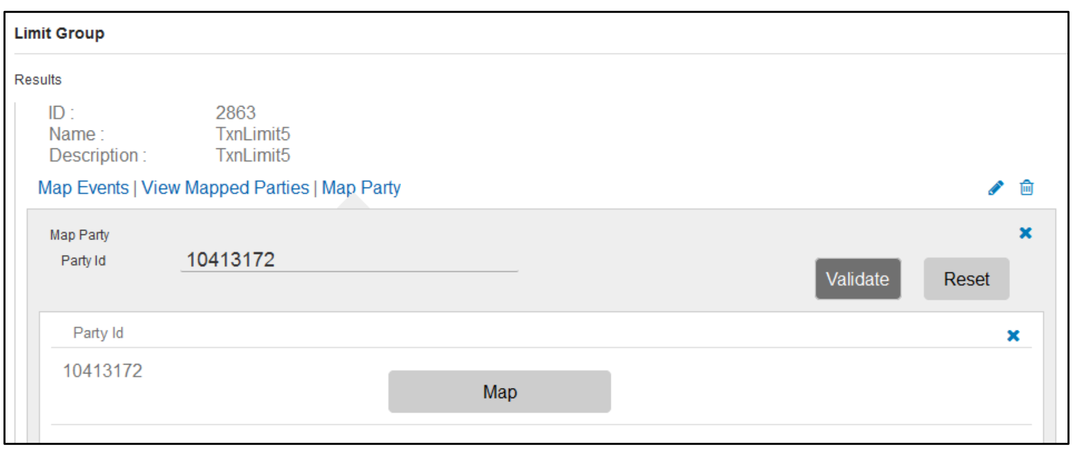
How to reach here:

Admin Dashboard > Limits > Limits Group > Map Party

To map a party:

1. In the **Limit Group** screen, click **Search**. The search result section appears.
2. Select the desired limit group and click the **Map Party** link. The **Map Party** section appears.

Limits Group – Map Party



Field Description

Field Name	Description
Party Id	Id of the party.

3. In the **Party ID** field, enter the id of the limit package.
4. Click **Validate**.
5. The mapped part id appears if it is a valid party id. Click **Map** .The success message appears.

Note: If party id entered is already mapped to another Limit Group then message with proper Limit Group Id is displayed to user.

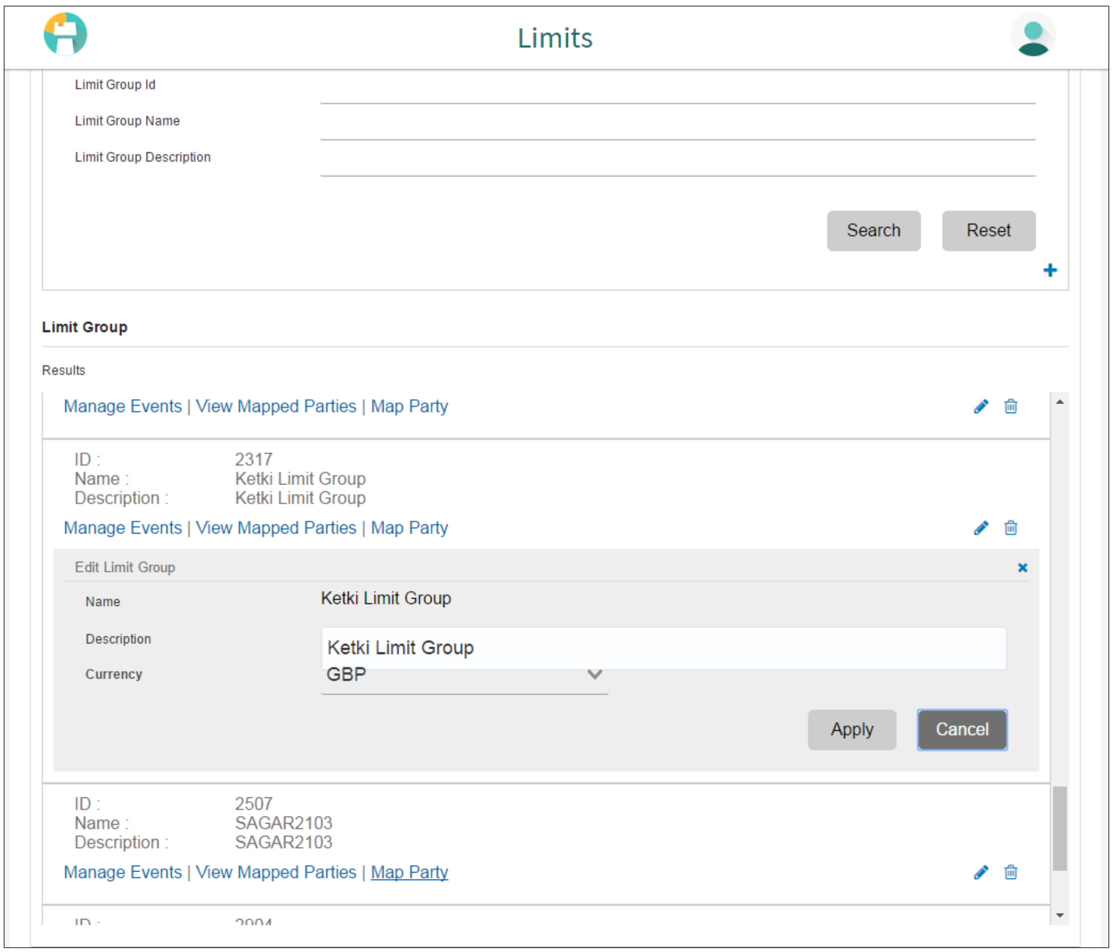
6.3 Update Limit Group

Using this option, bank administrator can update a limit group based on the details given as per the fields.

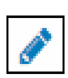
How to reach here:

Admin Dashboard > Limits > Limits Group

Edit Limit Group



To edit a limit group:

1. Enter the search criteria, click **Search**.
2. The **Limit Group** screen with search results appears based on the searched criteria.
   OR
   Click **Reset** to reset the search parameters.
3. To edit the limit group, click .
4. The **Edit Limit Group** section appears. Update the required fields.

Field Description

Field Name	Description
Name	Name of the limit group.
Description	Description of the limit group.
Currency	Currency of the limit group.

5. Click **Apply**.
   OR
   Click **Cancel** to cancel the transaction.
6. The success message of updating appears. Click **Done** to complete the transaction.

6.4 Create Limits

Using this option the bank administrators define the limits for a specific transaction.

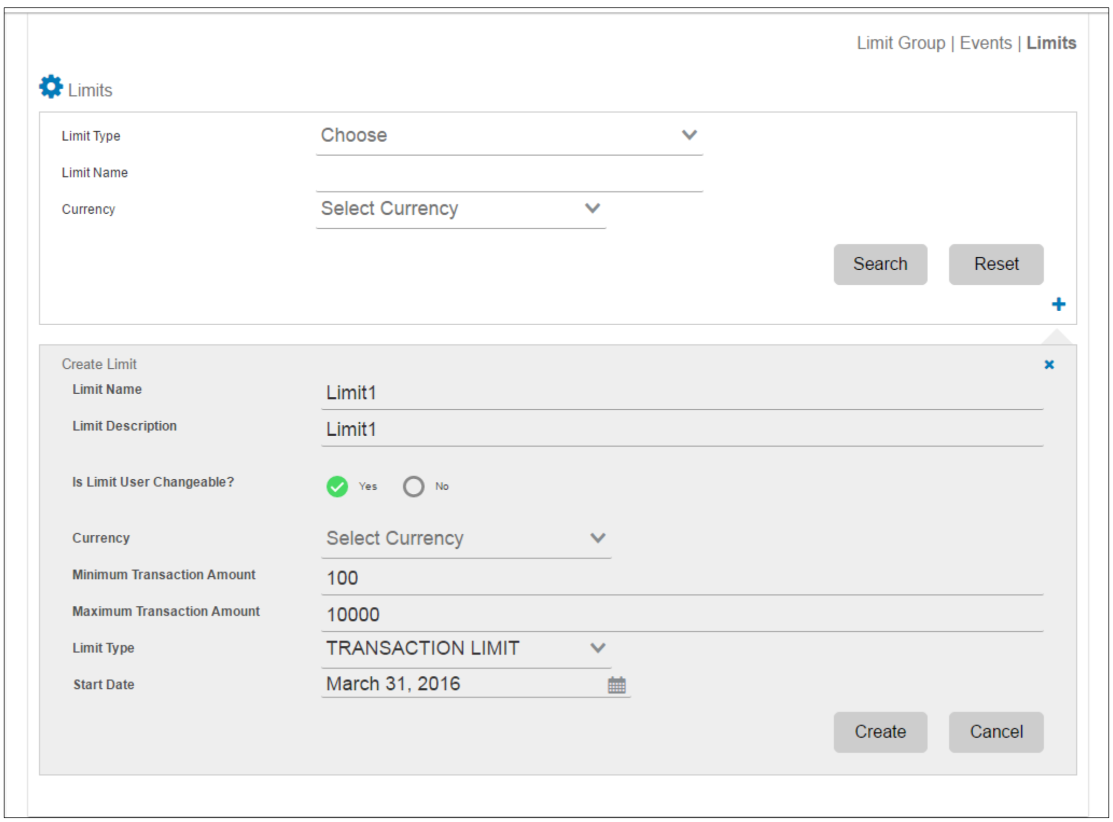
How to reach here:

Admin Dashboard > Limits > Limits

To create a limit package:

1. In the Limits screen, click the **Limits** link. The Limits screen appears.
2. Click . The **Create Limit** screen appears.

Create Limit



Field Description

Field Name	Description
Limit Name	Name of the limit
Limit Description	Description of the limit.

Field Name	Description
Is User Changeable	Indicates whether limit if changeable by user. The options are: • Yes • No
Currency	Currency in which the limit is to be created.
Minimum Amount	The minimum amount limit in which a transaction of the specific type can be initiated.
Maximum Amount	The maximum amount limit in which a transaction of the specific type can be initiated.
Limit Type	Type of limit. The options are: • Transaction Limit • Duration Limit
Start Date	The start date for the limit.

3. In the **Limit Name** field, enter the name of the limit.
4. In the **Limit Description** field, enter the description of the limit.
5. From the **Currency** list, select the appropriate currency.
6. From the **Limit Type** list, select the appropriate option.
7. In the **Minimum Amount** and **Maximum Amount** field, enter the appropriate amount.
8. From the **Start Date** list, select the appropriate date.
9. Click **Create**.
10. The success message appears. Click **Done** to complete the transaction.

6.5 View Limits

Using this option, bank administrator can search and view the details of existing limits packages maintained in the application.

If the search parameters are not specified, records of all the limits maintained in the application are displayed.

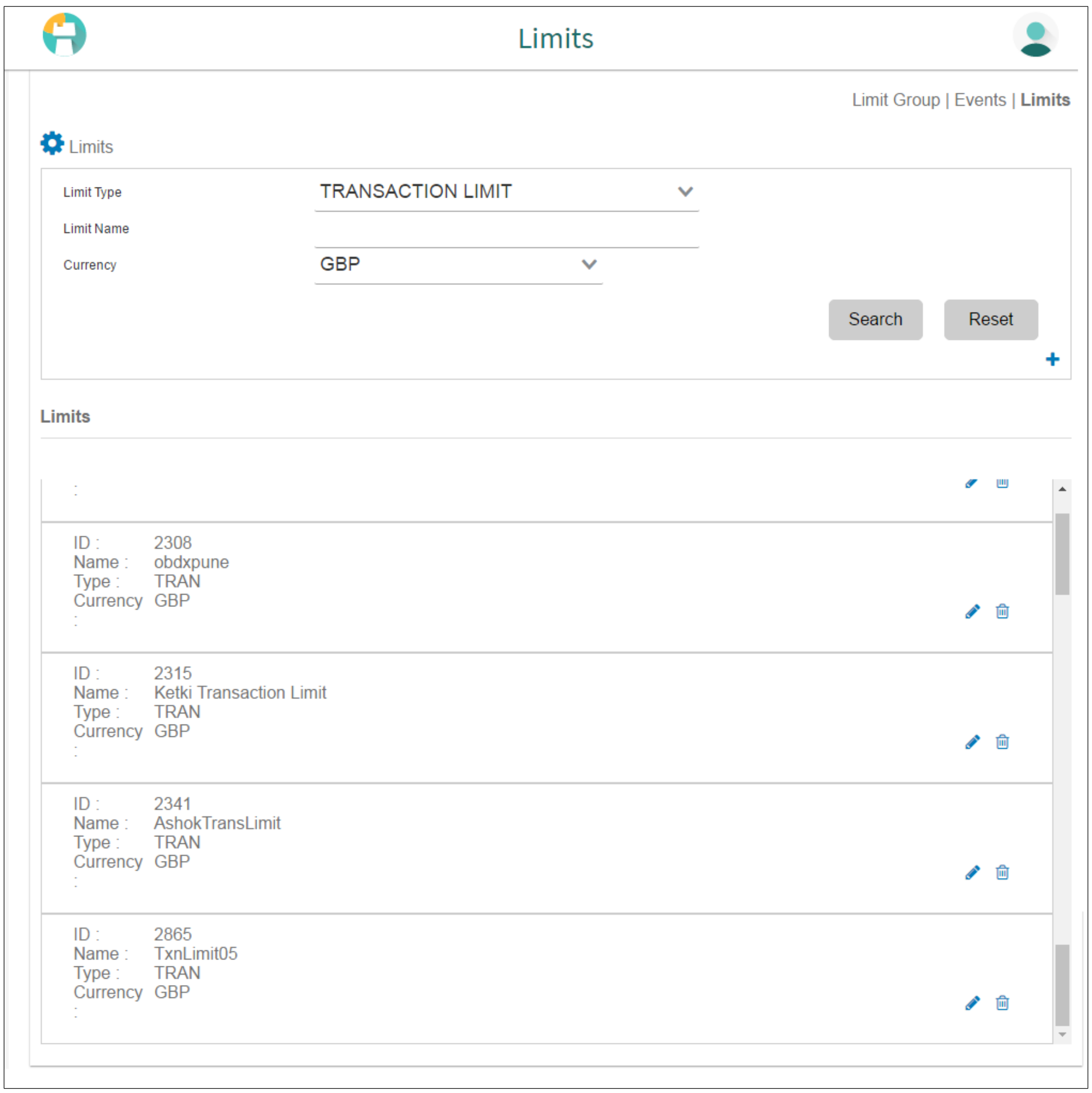
How to reach here:

Admin Dashboard > Limits > Limits

To view a limit package:

1. Click the View tab. The View maintenance got enabled.

Search Limits



Field Description

Field Name	Description
Limit Type	Type of limit. The options are: • Transaction Limit • Duration Limit
Limit Name	Name of the limit
Currency	Currency in which the limit package is defined.

2. Click **Search**. The Limits screen with search results appears based on the searched criteria.
   OR
   Click Reset to reset the search parameters.
3. To view the details of a specific limit package, click the record. The Limits screen appears.

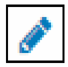
6.6 Update Limit

Using this option, bank administrator can edit the details of a limit, whose effective date has not been crossed.

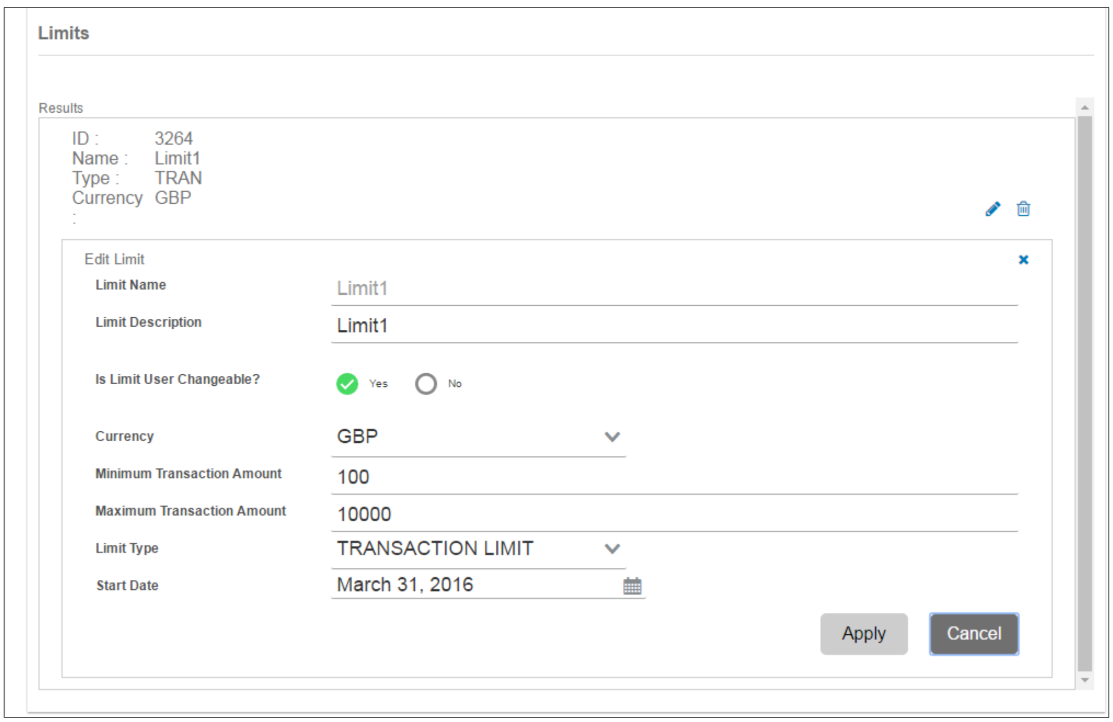
How to reach here:

Admin Dashboard > Limits > Limits

To edit a limit package:

1. Repeat steps 1 to 2 of View Limit section.
2. Click the record which you want to edit. The Edit Limit screen appears.
3. To edit the limit, click .

Edit Limit



4. Update the required fields, click **Apply**.
5. The success message appears. Click **Done** to complete the transaction.
   OR
   Click **Cancel** to cancel the transaction.

6.7 Search Events

Using this option, bank administrator can search and view the details of existing events maintained in the application.

Note: If the search parameters are not specified, records of all the events maintained in the application are displayed.

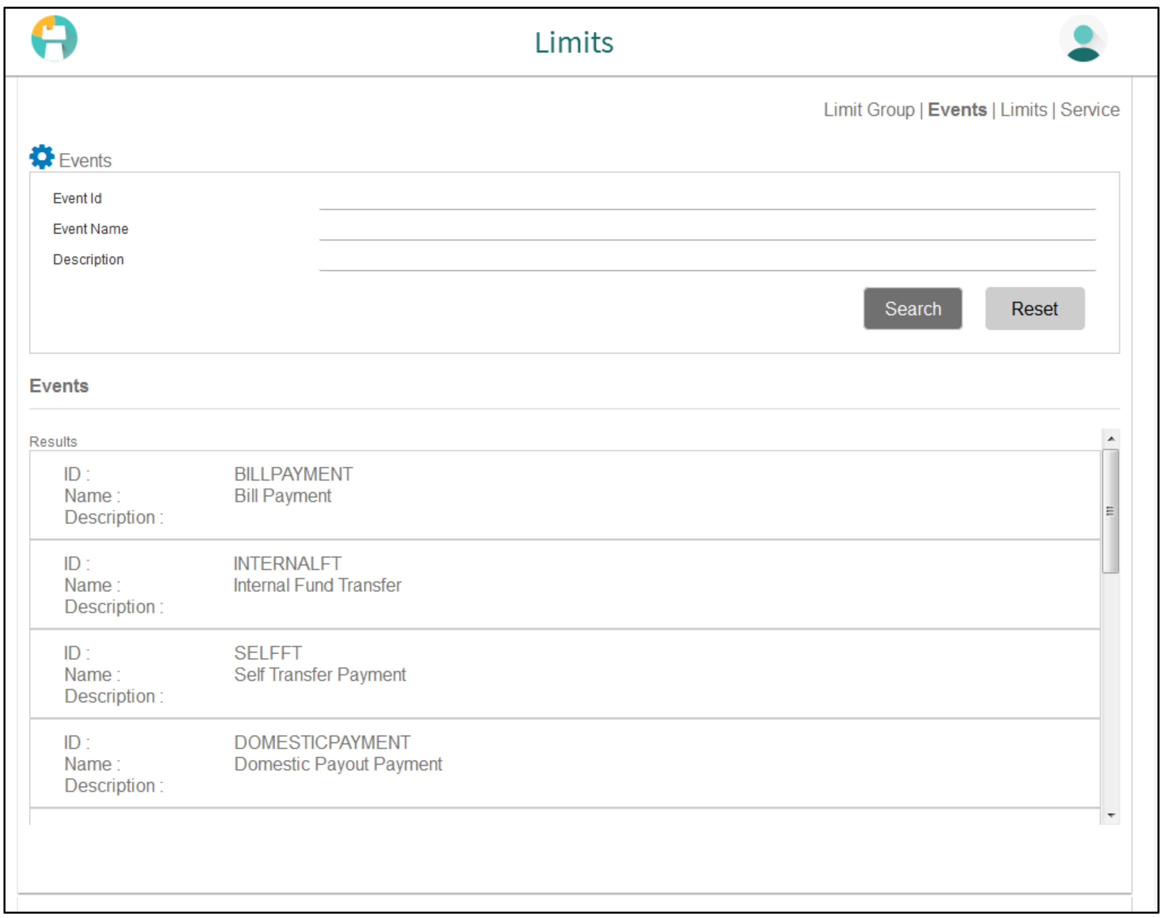
How to reach here:

Admin Dashboard > Limits > Events

To search Event:

1. In the **Limits** screen, click the **Events** link. The **Events** screen appears.
2. Enter the required search criteria, click **Search**.

Search Events



Field Description

Field Name	Description
Event Id	The unique Id to search the specific event.

Field Name	Description
Event Name	Name of the event.
Description	Description of the event.
Search Results	
Id	The unique Id to search the specific event.
Event Name	Name of the event.
Description	Description of the event.

3. The **Event** screen with search results appears based on the search parameters.
OR
Click **Reset** if you want to reset the search parameters.

6.8 Search Service

Using this option, bank administrator can search and view the details of existing service maintained in the application.

Note: If the search parameters are not specified, records of all the events maintained in the application are displayed.

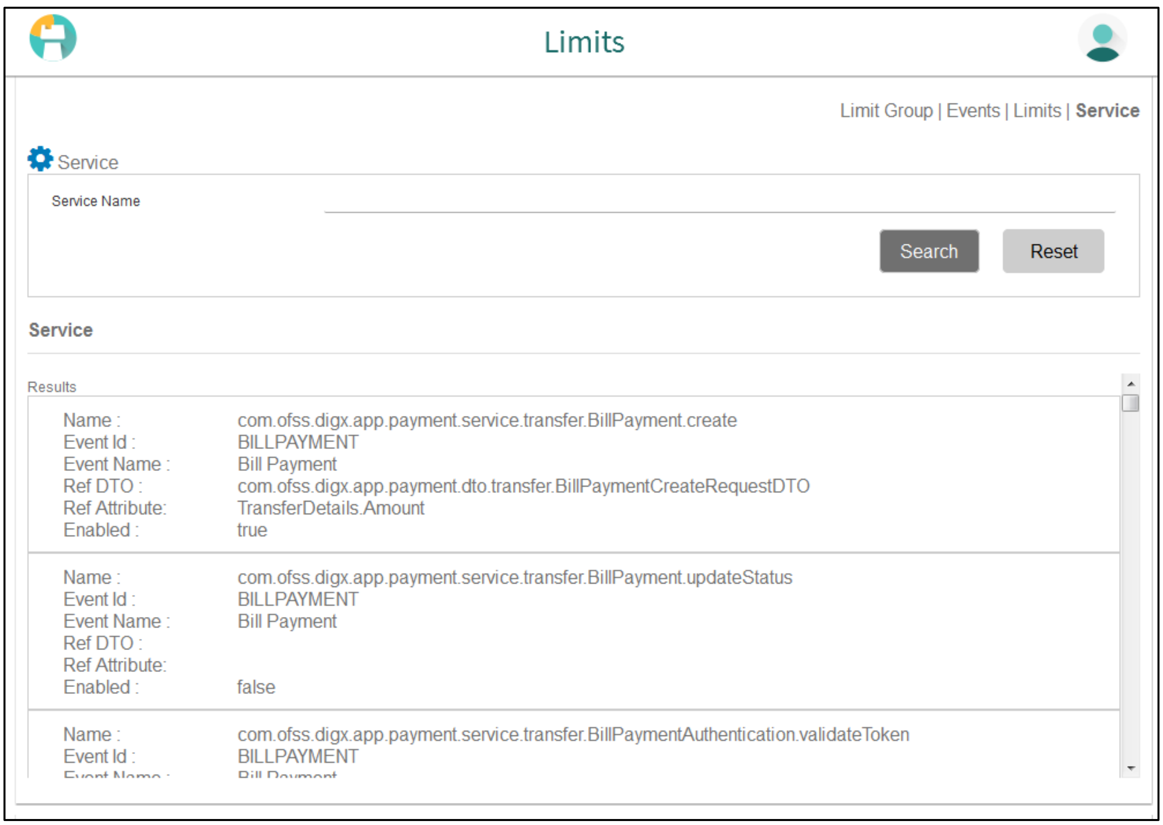
How to reach here:

Admin Dashboard > Limits > Service

To search Service:

1. In the **Limits** screen, click the **Service** link. The **Service** screen appears.
2. Enter the required search criteria, click **Search**.

Search Service



Field Description

Field Name	Description
Service Name	Name of the service.

3. The **Service** screen with search results appears based on the search parameters.
OR
Click **Reset** if you want to reset the search parameters.

FAQs

Can I change my daily limit of number of transactions per day?

No, only bank administrator can change the limits of number of transactions per day.