

# **Oracle Banking Digital Experience**

**Core User Manual  
Release 16.1.0.0.0**

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**ORACLE®**

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>.

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## 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.

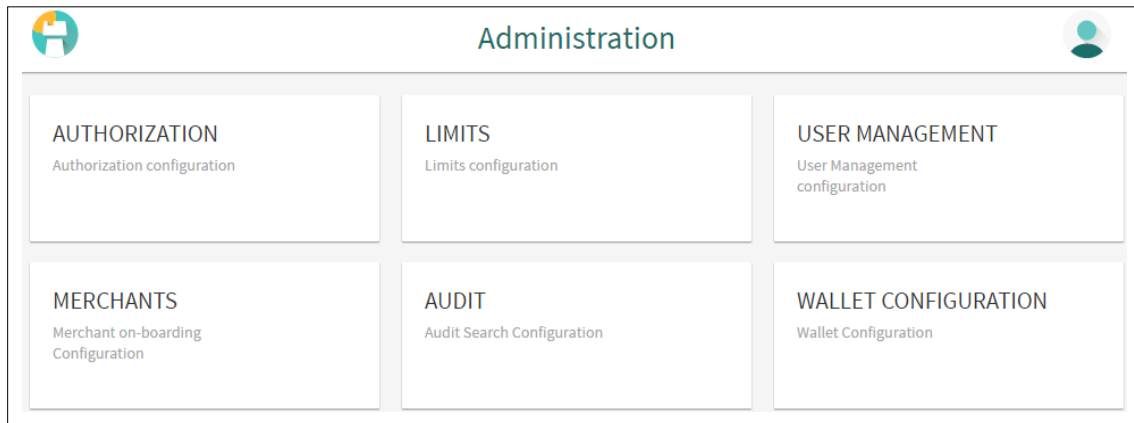
### 3. Core Dashboard

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.

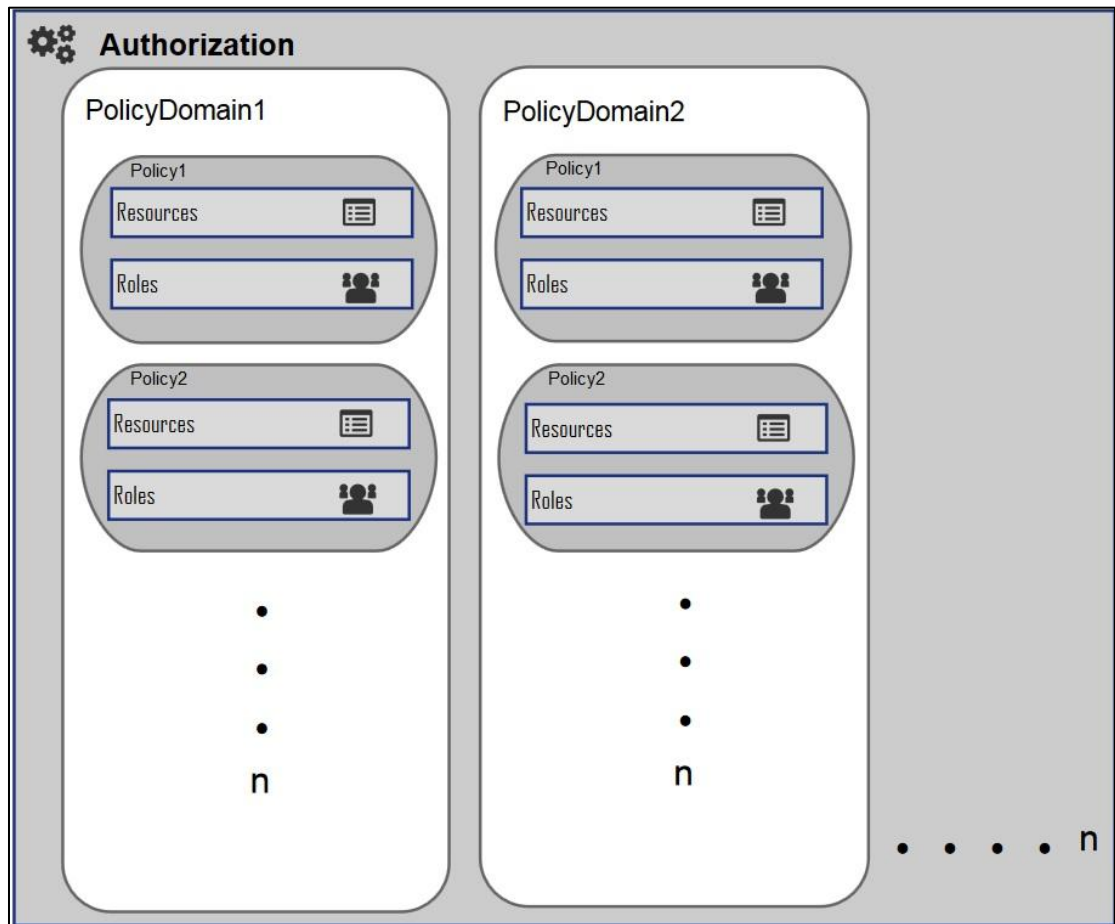
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## 4. Authorization

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.

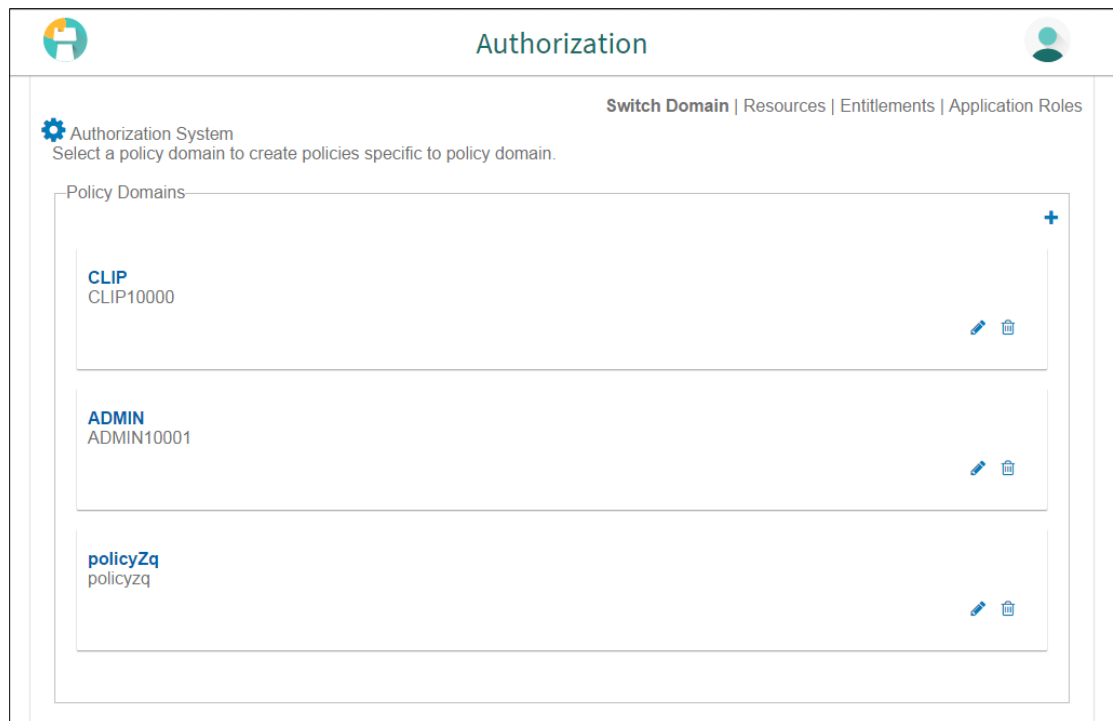
### 4.1.1 Create Policy Domain

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

The screenshot shows the 'Authorization System' interface. At the top, there is a navigation bar with 'Switch Domain | Resources | Entitlements | Application Roles'. Below this, the 'Authorization System' section is active, with a sub-header 'Policy Domains'. A modal dialog titled 'Create Policy Domain' is open, containing two input fields: 'Name' with the value 'Authorization Policy 1' and 'Description' with the value 'Authorization Policy 1'. At the bottom right of the dialog are 'Create' and 'Cancel' buttons.

### Field Description

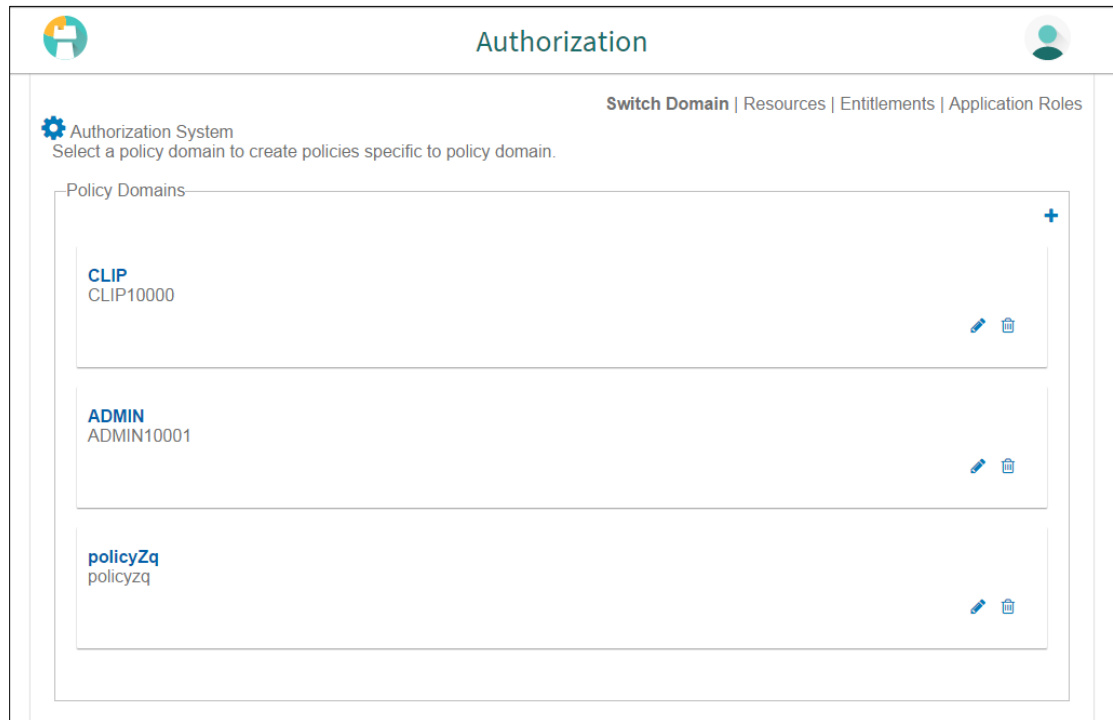
Field Name	Description
<b>Name</b>	Name of the policy domain.
<b>Description</b>	Description of the policy domain.

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.

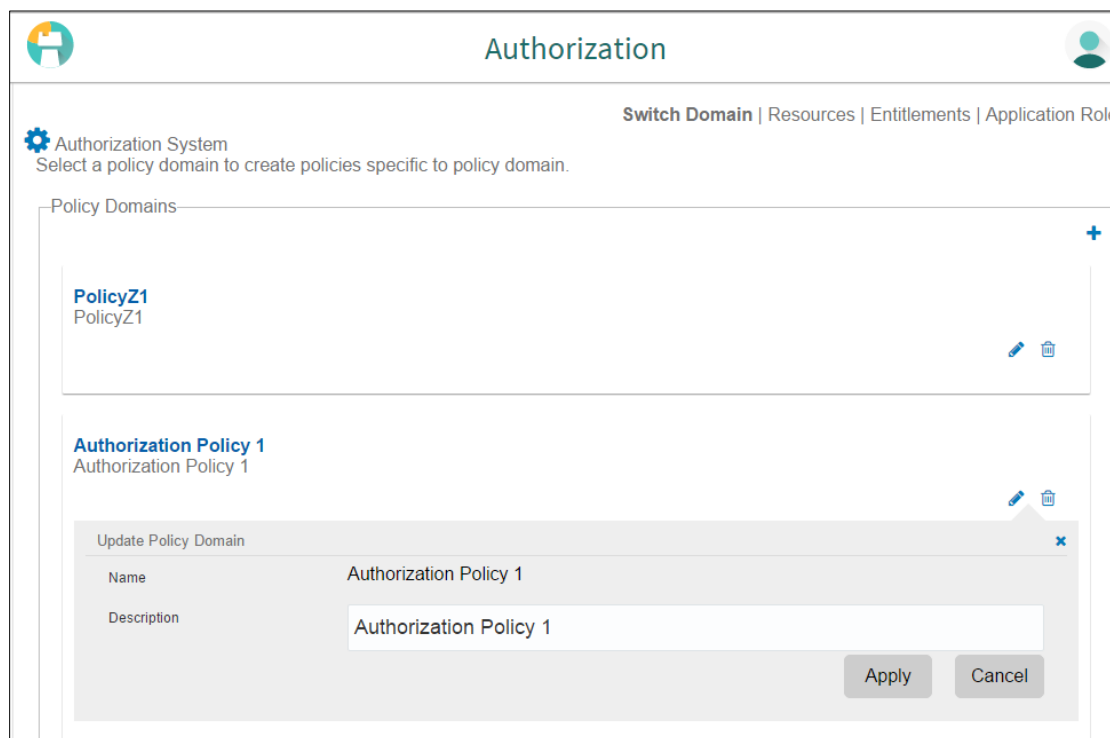
### Policy Domain




### 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

The screenshot shows the 'Authorization' system interface. At the top, there is a navigation bar with 'Authorization' in the center and a user profile icon on the right. Below the navigation bar, there are links for 'Switch Domain', 'Resources', 'Entitlements', and 'Application Roles'. The main content area is titled 'Authorization System' and includes a sub-header 'Select a policy domain to create policies specific to policy domain.' Below this, there is a list of 'Policy Domains' with a '+' icon in the top right corner. The list contains four items: 'PolicyZ1' (PolicyZ1), 'Authorization Policy 1' (Authorization Policy 1), 'CLIP' (CLIP10000), and 'ADMIN' (ADMIN10001). Each item has edit and delete icons. A 'Delete Warning' dialog box is overlaid on the 'PolicyZ1' item, asking 'Are you sure you want to delete this object? PolicyZ1' with 'Confirm' and 'Cancel' buttons.

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.

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**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
<b>Name</b>	Name of the policy.
<b>Effect</b>	Type of effect. The options can be: <ul style="list-style-type: none"> <li>• Permit</li> <li>• Deny</li> </ul>
<b>Application Role Name</b>	Name of the application role.
<b>Enterprise Role Name</b>	Name of the enterprise role.
<b>Resource Name</b>	Name of the resource.
<b>Entitlement Name</b>	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
<b>Policy Name</b>	You can view the following policy details: <ul style="list-style-type: none"> <li>• Policy Name</li> <li>• Policy Description</li> </ul>

- 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

The screenshot shows the 'Create New Policy' dialog box. At the top, there's a title bar 'Create New Policy' with a close button. Below it, the 'Effect' section has a checked 'Permit' radio button and an unchecked 'Deny' radio button. The 'Name' field contains 'Policy123' and the 'Description' field also contains 'Policy123'. The 'Map Resources' section is expanded, showing a list of 'Added Resources' with the text 'com.ofss.digx.app.audit.service.Audit.createHostAuditLog', 'com.ofss.digx.app.audit.service.Audit.createHostAuditLogDescription', and 'com.ofss.digx.app.audit.service.Audit.createHostAuditLogDisplayName'. To the right of this list, it says 'Resource Type: SVC'. Below this is a 'Map Entitlements' section, which is also expanded. It contains a sub-dialog titled 'Search entitlements and map them with the policy' with fields for 'Entitlement Name' and 'Resource Name', and 'Search' and 'Reset' buttons. Below the search dialog, it says 'Search Results' and 'No data to display.'. At the bottom right of the main dialog, there is a 'Done' button.



### 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
<b>Effect</b>	Type of effect. The options can be: <ul style="list-style-type: none"> <li>• Permit</li> <li>• Deny</li> </ul>
<b>Name</b>	Type of effect. The options can be: <ul style="list-style-type: none"> <li>• Permit</li> <li>• Deny</li> </ul>
<b>Description</b>	The description of policy.
<b>Map Resources</b>	
<b>Resource Type</b>	Type of resources.
<b>Resource Name</b>	Name of the enterprise role.


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

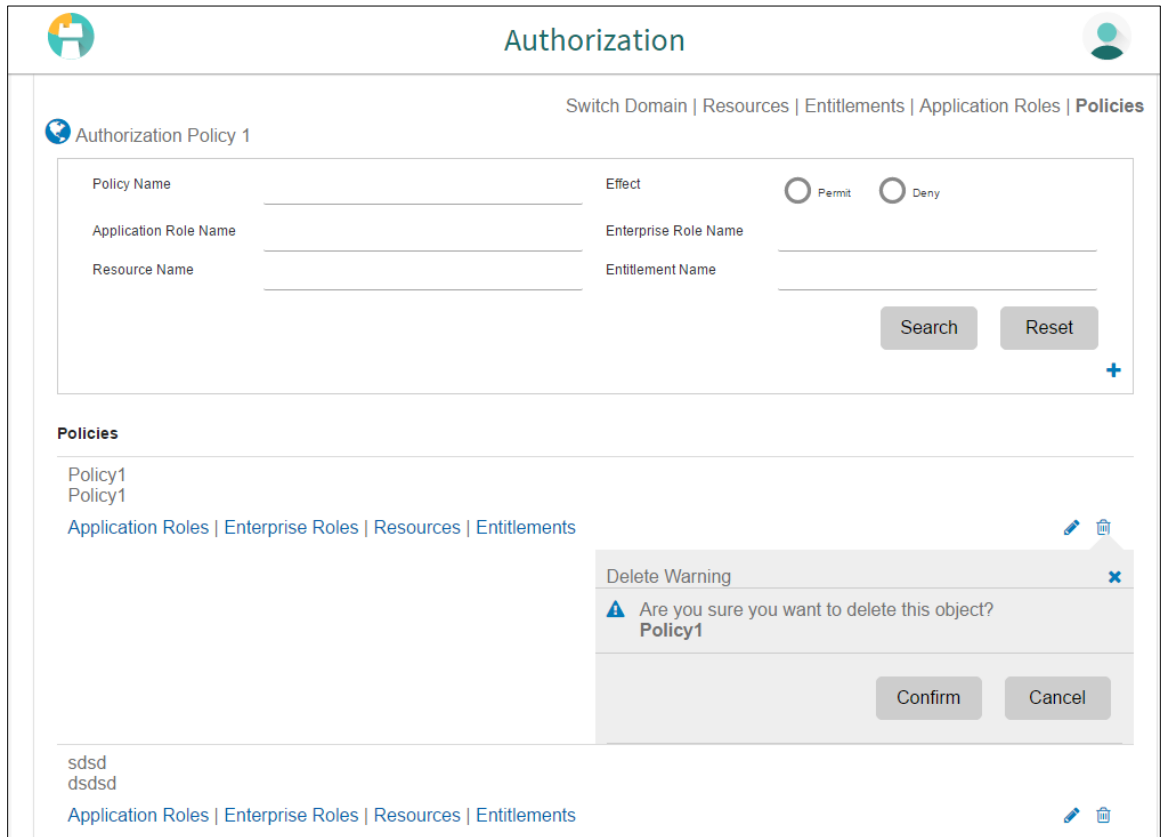
Using this option you can delete an existing policy.

##### 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

The screenshot shows the 'Authorization' console interface. At the top, there are navigation links: 'Switch Domain | Resources | Entitlements | Application Roles'. Below this is the 'Authorization System' section. It contains a search form with the following elements:

- Resource Type:** Four radio buttons are present: 'Service' (selected), 'Service Response', 'UI Component', and 'Page'.
- Resource Name:** A text input field.
- Buttons:** 'Search' and 'Reset' buttons are located to the right of the input field.
- Resources List:** Below the search form, a list of resources is displayed. Each entry includes a long alphanumeric name and a type 'SVC'. For example:
  - com.ofss.digx.app.sms.service.user.User.fetchConfiguration SVC
  - com.ofss.digx.app.config.service.ConfigDMS.delete SVC
  - com.ofss.digx.app.audit.service.Audit.createHostAuditLog SVC
  - com.ofss.digx.app.security.service.policy.Policy.addApplicationRoles SVC
  - com.ofss.digx.app.limits.service.limit.Limit.fetchLimitsForEvent SVC

## Field Description

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

### Search Users

<b>Resource Type</b>	The type of resource. The options are:
----------------------	---

- Service
- Service Response
- UI Component
- Page

<b>Resource Name</b>	Name of the resource.
----------------------	-----------------------



2. Click **Search**.

- 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
<b>Resources</b>	<p>You can view the following resource details:</p> <ul style="list-style-type: none"> <li>Resource Id</li> <li>Resource Name</li> <li>Resource Display Name</li> <li>Resource Description</li> </ul>

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

### 4.3.2 Create New Resource

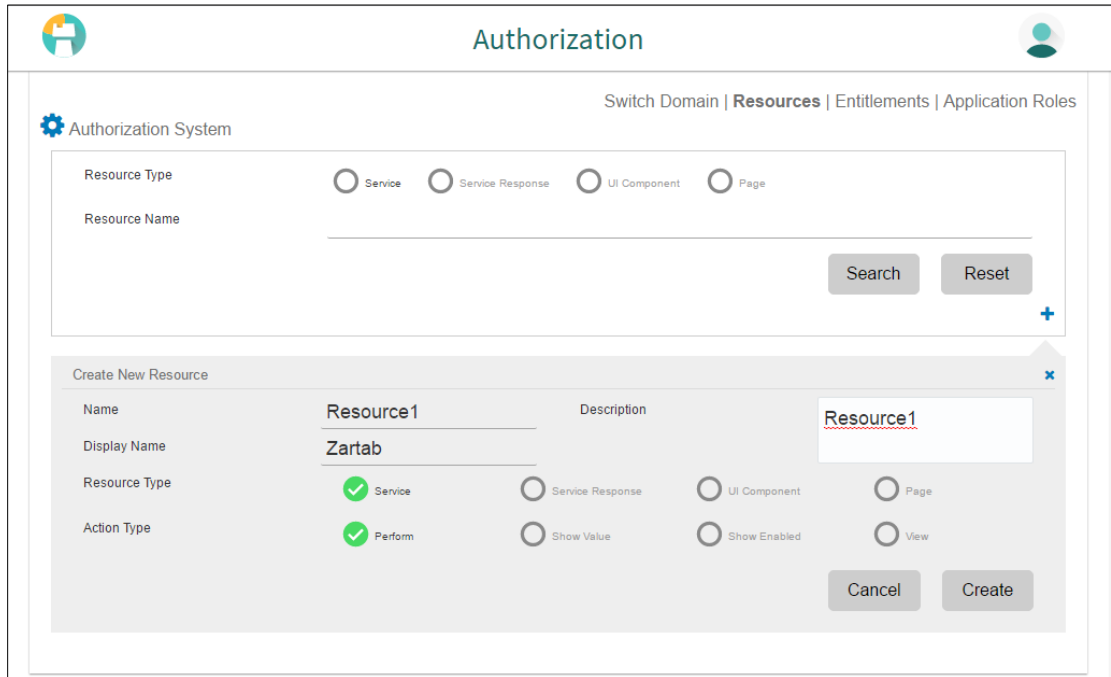
Using this option, you can create a new resource.

#### To create a resource:

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




### Create New Resource



### Field Description


Field Name	Description
<b>Name</b>	Name of the resource.
<b>Description</b>	Description of the resource.
<b>Display Name</b>	Display name of the resource.
<b>Resource Type</b>	Type of resource. The options are: <ul style="list-style-type: none"> <li>• Service</li> <li>• Service Response</li> <li>• UI Component</li> <li>• Page</li> </ul>
<b>Action Type</b>	Type of action. The options are: <ul style="list-style-type: none"> <li>• Perform</li> <li>• Show Value</li> <li>• Show Enabled</li> <li>• View</li> </ul>

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.

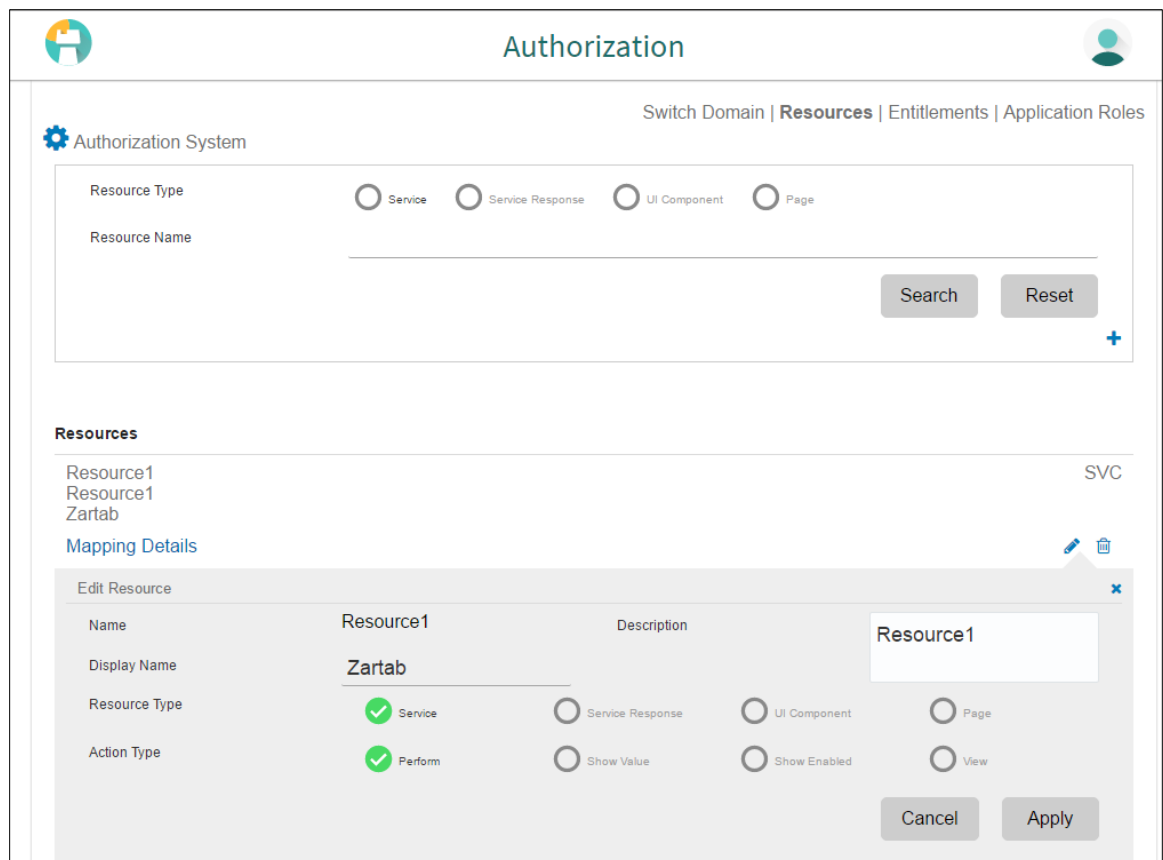
### 4.3.3 Edit Resource


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.

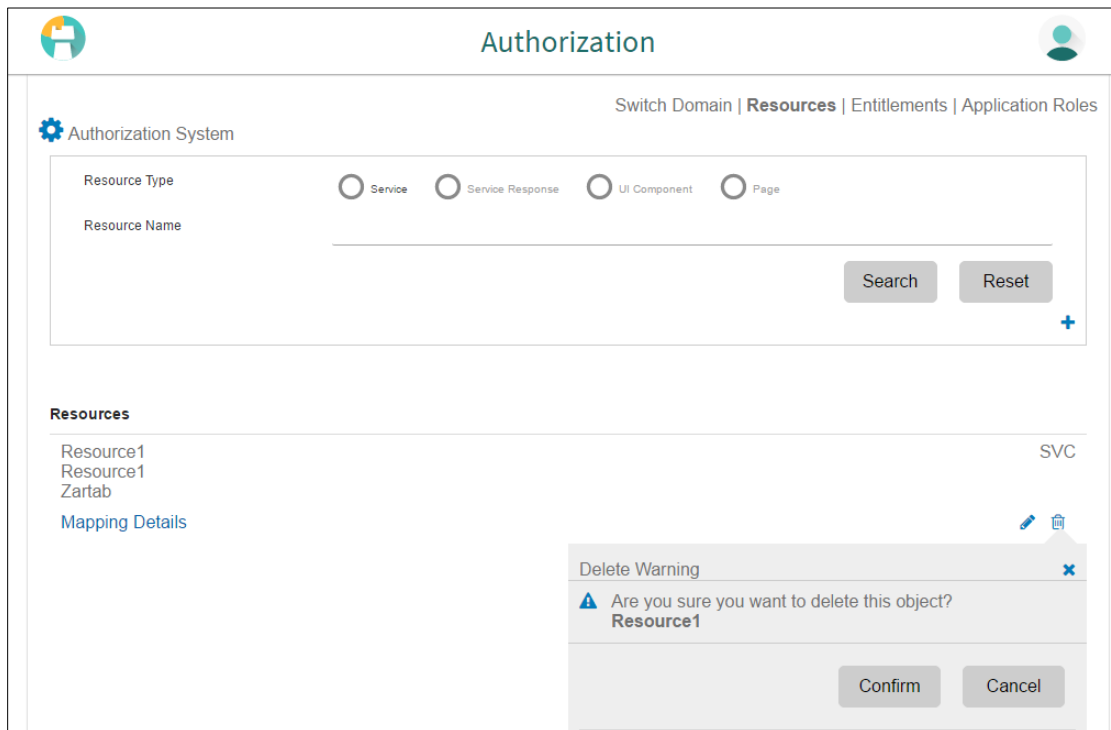
#### 4.3.4 Delete Resource


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

The screenshot shows the 'Authorization System - Application Roles' interface. At the top, there's a navigation bar with 'Switch Domain | Resources | Entitlements | Application Roles'. Below that, a search form is visible with two input fields: 'Application Role Name' and 'Enterprise Role Name'. To the right of these fields are 'Search' and 'Reset' buttons. Below the search form, there's a table titled 'Application Roles' with three rows of data. Each row contains the role name, its description, and a link to 'Enterprise Roles | Mapping Details'. To the right of each row are edit and delete icons.

Application Role Name	Description	Actions
AuthAdmin	AuthAdminDescription AuthAdminDisplayName	Enterprise Roles   Mapping Details [Edit] [Delete]
Customer	CustomerDescription CustomerDisplayName	Enterprise Roles   Mapping Details [Edit] [Delete]
anonymous-role	anonymous-roleDescription anonymous-roleDisplayName	Enterprise Roles   Mapping Details [Edit] [Delete]

#### Field Description

Field Name	Description
<b>Application Role Name</b>	Name of the application role.
<b>Enterprise Role Name</b>	Name of enterprise.

2. Click **Search**.

- 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
<b>Application Roles</b>	<p>You can view the following application role details:</p> <ul style="list-style-type: none"> <li>• Application Role Name</li> <li>• Application Role Display Name</li> <li>• Application Role Description</li> </ul>

- 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:

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




## Create Application Role

The screenshot shows the 'Create Application Role' interface. At the top, there's a search bar for 'Enterprise Role Name' with 'Search' and 'Reset' buttons. Below this is a 'Create Application Role' section with three input fields: 'Name' (Application Role1), 'Display Name' (Application Role1), and 'Description' (Application Role1). The next section is 'Map Enterprise Roles', which includes another search bar for 'Enterprise Role Name' and a list of search results: 'anonymous-role', 'Customer', 'AuthAdmin', 'Administrators', and 'SPMLAdmin'. Each result has a plus icon to its right. A 'Done' button is at the bottom right of this section. Below the mapping section is an 'Added Enterprise Roles' list containing 'AuthAdmin' and 'Administrators', each with a trash icon. At the very bottom are 'Create' and 'Cancel' buttons.

### Field Description

Field Name	Description
<b>Name</b>	Name of the application role.
<b>Display Name</b>	Display name of the application role.
<b>Description</b>	Description of the application role.
<b>Map Enterprise Roles</b>	


Field Name	Description
<b>Enterprise Role Name</b>	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

The screenshot shows the 'Update Application Role' dialog box in the Authorization System. The dialog has a title bar with 'Update Application Role' and a close button. It contains the following sections:

- Name:** anonymous-role
- Display Name:** anonymous-roleDisplayName
- Description:** anonymous-roleDescription
- Map Enterprise Roles:** A section with a plus icon to add roles.
- Added Enterprise Roles:** A list containing 'anonymous-role' with a trash icon to remove it.

At the bottom of the dialog are 'Apply' and 'Cancel' buttons.


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

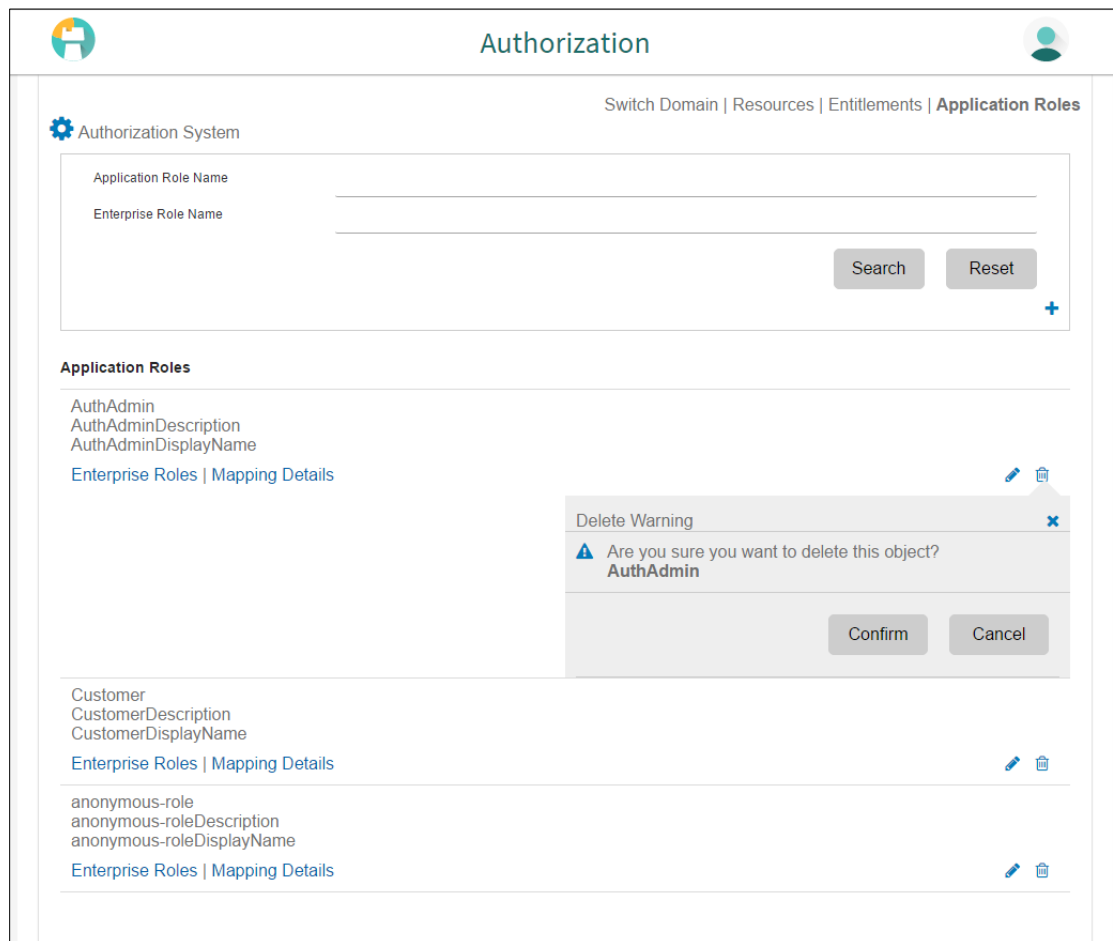
Using this option you can delete an existing application role.

**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



The screenshot shows the 'Authorization' system interface. At the top, there is a navigation bar with 'Switch Domain | Resources | Entitlements | Application Roles'. Below this, the 'Authorization System' section contains search filters for 'Application Role Name' and 'Enterprise Role Name', with 'Search' and 'Reset' buttons. The main area displays a list of 'Application Roles' with details for 'AuthAdmin', 'Customer', and 'anonymous-role'. A 'Delete Warning' dialog box is overlaid on the 'AuthAdmin' role, asking 'Are you sure you want to delete this object?' and providing 'Confirm' and 'Cancel' options.

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*

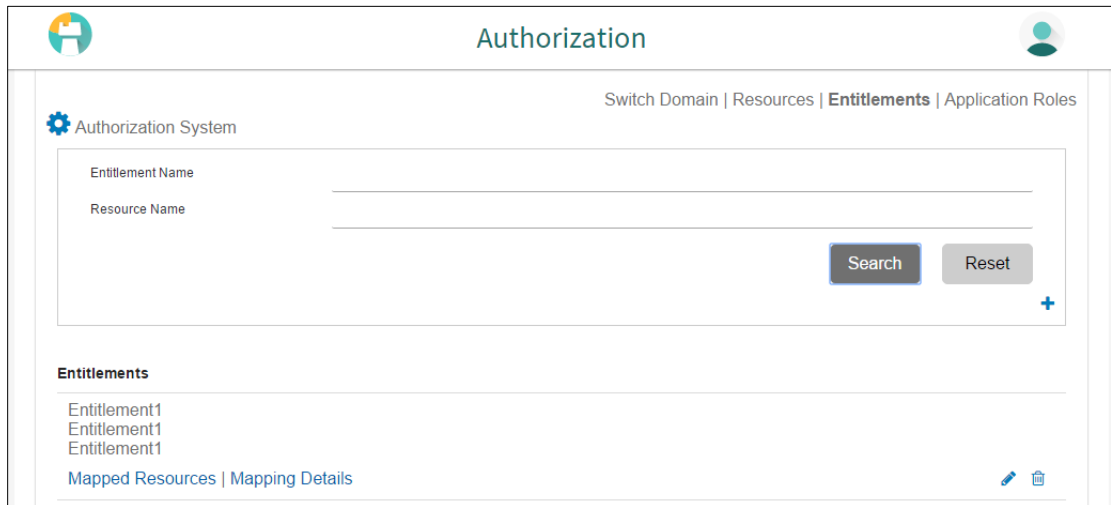
### 4.5.1 Search Entitlement

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
<b>Check Group Roles to Assign or Remove</b>	
<b>Entitlement Name</b>	Name of entitlement.
<b>Resource Name</b>	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
<b>Entitlement Name</b>	You can view the following application role details: <ul style="list-style-type: none"> <li>• Entitlement Name</li> <li>• Resource Name</li> </ul>

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

The screenshot shows the 'Create Entitlement' form in the Authorization System. The form is divided into several sections:

- Authorization System:** Includes a search bar for Entitlement Name and Resource Name, with 'Search' and 'Reset' buttons.
- Create Entitlement:** A form with the following fields:
  - Name: Entitlement1
  - Display Name: Entitlement1
  - Description: Entitlement1
- Map Resources:** A section for selecting resources to map to the entitlement. It includes a search bar and radio buttons for Resource Type:
  - Service (selected)
  - Service Response
  - UI Component
  - Page
- Search Results:** A list of search results for resources of type 'SVC':
  - com.ofss.digx.app.sms.service.user.User.fetchConfiguration (Resource Type: SVC)
  - com.ofss.digx.app.config.service.ConfigDMS.delete (Resource Type: SVC)
  - com.ofss.digx.app.account.service.core.Account.list (Resource Type: SVC)
  - com.ofss.digx.app.wallet.service.core.Wallet.fetchNotifications (Resource Type: SVC)
  - com.ofss.digx.app.sms.service.user.credentials.Credentials.forgotCredentials (Resource Type: SVC)

### Field Description



Field Name	Description
<b>Name</b>	Name of the entitlement.
<b>Display Name</b>	Display name of the entitlement.
<b>Description</b>	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
<b>Resource Type</b>	Type of resource. The options are: <ul style="list-style-type: none"> <li>• Service</li> <li>• Service Request</li> <li>• UI Component</li> <li>• Page</li> </ul>
<b>Resource Name</b>	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

**Entitlements**

Entitlement1  
Entitlement1  
Entitlement1

[Mapped Resources](#) | [Mapping Details](#)

Update Entitlement

Name: Entitlement1

Display Name: Entitlement1

Description: Entitlement1

**Map Resources**

Search for resources and add them to the entitlement

Resource Type:  Service  Service Response  UI Component  Page

Resource Name: \_\_\_\_\_

**Search** **Reset**

**Search Results**

com.ofss.digx.app.sms.service.user.User.fetchConfiguration  
com.ofss.digx.app.sms.service.user.User.fetchConfigurationDescription  
com.ofss.digx.app.sms.service.user.User.fetchConfigurationDisplayName Resource Type: SVC

com.ofss.digx.app.config.service.ConfigWebService.listPropertiesDescription  
com.ofss.digx.app.config.service.ConfigWebService.listPropertiesDisplayName +

com.ofss.digx.app.limits.service.limit.Limit.readLimit  
com.ofss.digx.app.limits.service.limit.Limit.readLimitDescription  
com.ofss.digx.app.limits.service.limit.Limit.readLimitDisplayName Resource Type: SVC


com.ofss.digx.app.sms.service.user.User.updateConfiguration  
com.ofss.digx.app.sms.service.user.User.updateConfigurationDescription  
com.ofss.digx.app.sms.service.user.User.updateConfigurationDisplayName Resource Type: SVC

**Done**

**Added Resources**

com.ofss.digx.app.sms.service.user.User.fetchConfiguration  
com.ofss.digx.app.sms.service.user.User.fetchConfigurationDescription  
com.ofss.digx.app.sms.service.user.User.fetchConfigurationDisplayName Resource Type: SVC

**Apply** **Cancel**


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

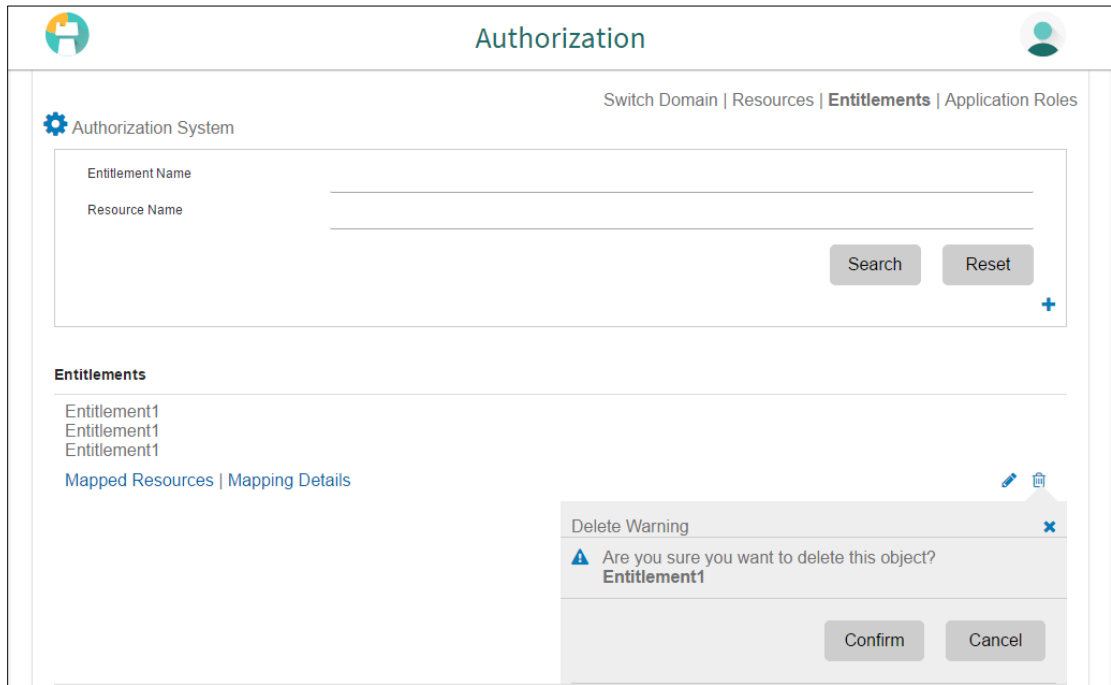
Using this option you can delete an existing entitlement.

**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:**

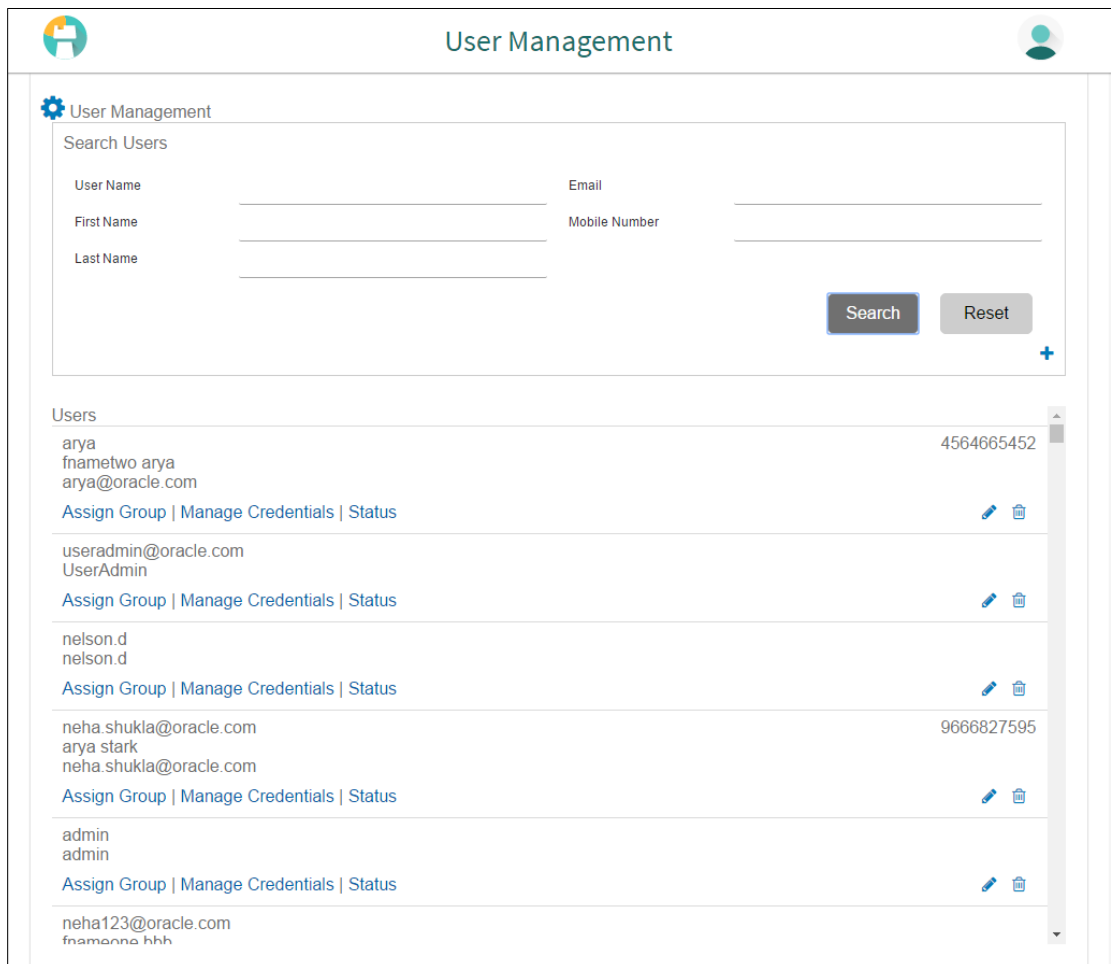
*Dashboard > User Management*

### 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





The screenshot displays the 'User Management' interface. At the top, there is a search bar with the title 'Search Users'. Below the search bar, there are four input fields for search criteria: 'User Name', 'Email', 'First Name', and 'Last Name'. To the right of these fields are 'Search' and 'Reset' buttons. Below the search bar, there is a table of users. The table has columns for user details and actions. The users listed are:

User Name	Email	Mobile Number	Actions
arya fnametwo arya arya@oracle.com		4564665452	<a href="#">Assign Group</a>   <a href="#">Manage Credentials</a>   <a href="#">Status</a>
useradmin@oracle.com UserAdmin			<a href="#">Assign Group</a>   <a href="#">Manage Credentials</a>   <a href="#">Status</a>
nelson.d nelson.d			<a href="#">Assign Group</a>   <a href="#">Manage Credentials</a>   <a href="#">Status</a>
neha.shukla@oracle.com arya stark neha.shukla@oracle.com		9666827595	<a href="#">Assign Group</a>   <a href="#">Manage Credentials</a>   <a href="#">Status</a>
admin admin			<a href="#">Assign Group</a>   <a href="#">Manage Credentials</a>   <a href="#">Status</a>
neha123@oracle.com fnamenne hhh			

**Field Description**

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

Create New User
✕

User Type  Customer  Employee

---

**Employee Details**

Organization  Manager

Employee Number

---

**Profile Information**

User Name  Email Id

Title  First Name

Middle Name  Last Name

---

**Address Details**

Address Line 1  Address Line 2

Address Line 3  Address Line 4

City  State

Country  Pin Code

---

**Miscellaneous Information**

Contact number (mobile)  Contact number (landline)

Date of Birth  Home Branch

Home Entity  Accessible Entity

User Groups

### Field Description

Field Name	Description
<b>User Type</b>	Type of user. The options can be: <ul style="list-style-type: none"> <li>• Customer</li> <li>• Employee</li> </ul>


### Employee Details

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

Field Name	Description
<b>Party ID</b>	Party id assigned to the user.
<b>Assigned Party ID</b>	Displays the party id assigned to the user.
<b>Employee Details</b>	
This section appears, if you select <b>Employee</b> option from <b>User Type</b> list.	
<b>Organization</b>	Name of the organization.
<b>Manager</b>	Name or id of manager.
<b>Employee Number</b>	Employee id of the user.
<b>Profile Information</b>	
<b>User Name</b>	Common name or user id of the user.
<b>Email Id</b>	Email address of the user.
<b>Title</b>	Salutation to be used. The options are: <ul style="list-style-type: none"> <li>• Mr</li> <li>• Mrs</li> <li>• Miss</li> <li>• Dr</li> </ul>
<b>First Name</b>	First name or given name of the user.
<b>Middle Name</b>	Middle name of the user.
<b>Last Name</b>	Last name of the user.
<b>Address Details</b>	
<b>Address Line 1,2</b>	Address details for contact information of the user.
<b>Address Line 3,4</b>	Address details for contact information of the user.
<b>City</b>	City of residence of the user.
<b>State</b>	State of the user.
<b>Country</b>	Country of the user.
<b>Pin Code</b>	Zip code of the user.
<b>Miscellaneous Information</b>	

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

Update User ✕

User Type is : CUSTOMER

---

Assigned Party Id : 000001005

---

Profile Information

User Name	<input type="text" value="pravin.shah1@oracle.com"/>	Email Id	<input type="text"/>
Title	<input type="text"/>	First Name	<input type="text" value="Pravin"/>
Middle Name	<input type="text"/>	Last Name	<input type="text" value="Shah"/>

---

Address Details

Address Line 1	<input type="text"/>	Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>	Address Line 4	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>
Country	<input type="text"/>	Pin Code	<input type="text"/>

---

Miscellaneous Information

Contact number (mobile)	<input type="text"/>	Contact number (landline)	<input type="text"/>
Date of Birth	<input type="text" value="2016-03-29"/>	Home Branch	<input type="text" value="b001"/>
Home Entity	<input type="text" value="Netbanking"/>	Accessible Entity	<input type="text" value="Personal Banking"/>



**Field Description**

<b>Field Name</b>	<b>Description</b>
<b>User Type</b>	Type of user. <ul style="list-style-type: none"> <li>• Customer</li> <li>• Employee</li> </ul>
<b>Assigned Party ID</b>	Party id assigned to the user. This field appears for the Customer type of user.
<b>Profile Information</b>	
<b>User Name</b>	Common name or user id of the user.
<b>Email Id</b>	Email address of the user.
<b>Title</b>	Salutation to be used. The options are: <ul style="list-style-type: none"> <li>• Mr</li> <li>• Mrs</li> <li>• Miss</li> <li>• Dr</li> </ul>
<b>First Name</b>	First name or given name of the user.
<b>Middle Name</b>	Middle name of the user.
<b>Last Name</b>	Last name of the user.
<b>Organization</b>	Name of the organization. This field appears for the Employee type of user.
<b>Manager</b>	Name or id of manager. This field appears for the Employee type of user.
<b>Employee Number</b>	Employee id. This field appears for the Employee type of user.
<b>Address Details</b>	
<b>Address Line 1,2</b>	Address details for contact information of the user.
<b>Address Line 3,4</b>	Address details for contact information of the user.
<b>City</b>	City of residence of the user.
<b>State</b>	State of the user.

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

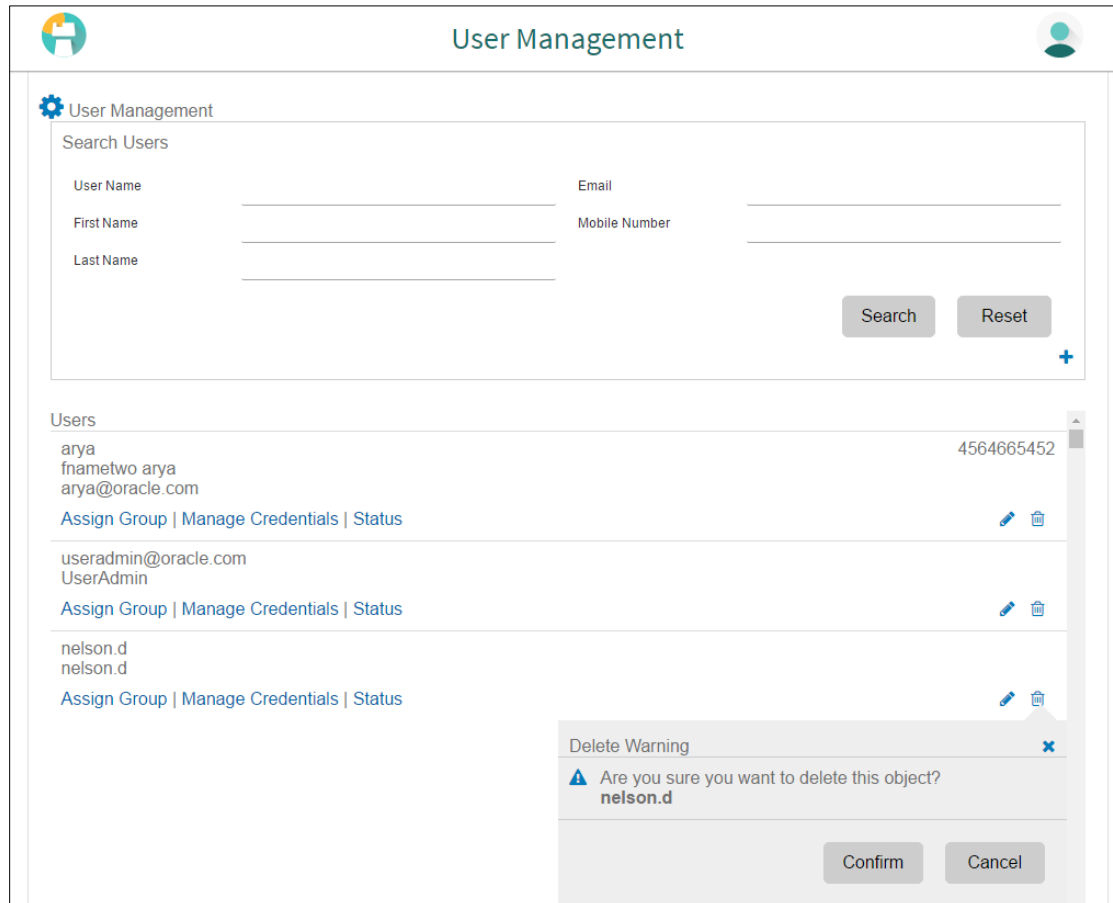
## 5.4 Delete User

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



The screenshot displays the 'User Management' interface. At the top, there is a search form with fields for 'User Name', 'Email', 'First Name', 'Last Name', and 'Mobile Number'. Below the search form is a table of users. The table has three rows of user data. The first row is for 'arya' with ID '4564665452'. The second row is for 'useradmin@oracle.com' with ID 'UserAdmin'. The third row is for 'nelson.d' with ID 'nelson.d'. Each row has links for 'Assign Group', 'Manage Credentials', and 'Status', along with edit and delete icons. A 'Delete Warning' dialog box is open in the bottom right corner, asking 'Are you sure you want to delete this object?' for the user 'nelson.d'. The dialog has 'Confirm' and 'Cancel' buttons.

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.

---

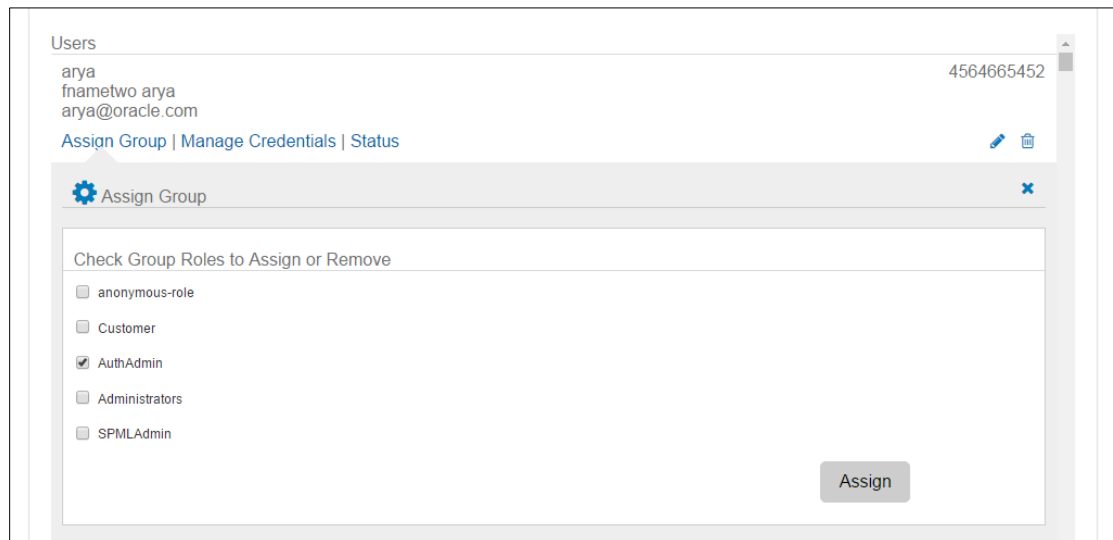
### How to reach:

*Dashboard > User Management > Search User > Assign Groups*

### To assign a group:

1. In the **User Management** 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

<b>Group Roles</b>	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

The screenshot shows the 'Manage Credentials' modal for the user 'arya'. The user's details are: 'arya', 'fnametwo arya', and 'arya@oracle.com'. The modal title is 'Manage Credentials' with a close button. A dropdown menu is set to 'Reset Password'. Below the dropdown is a text box containing the message: 'The new login credentials will be sent to the user's email address.' and a 'Reset Password' button. The background shows a list of users with 'arya' selected.

### Field Description

Field Name	Description
<b>Manage Credentials</b>	<p>Manages credential related operations.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Reset Password</li> <li>• Change Password</li> </ul>

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.

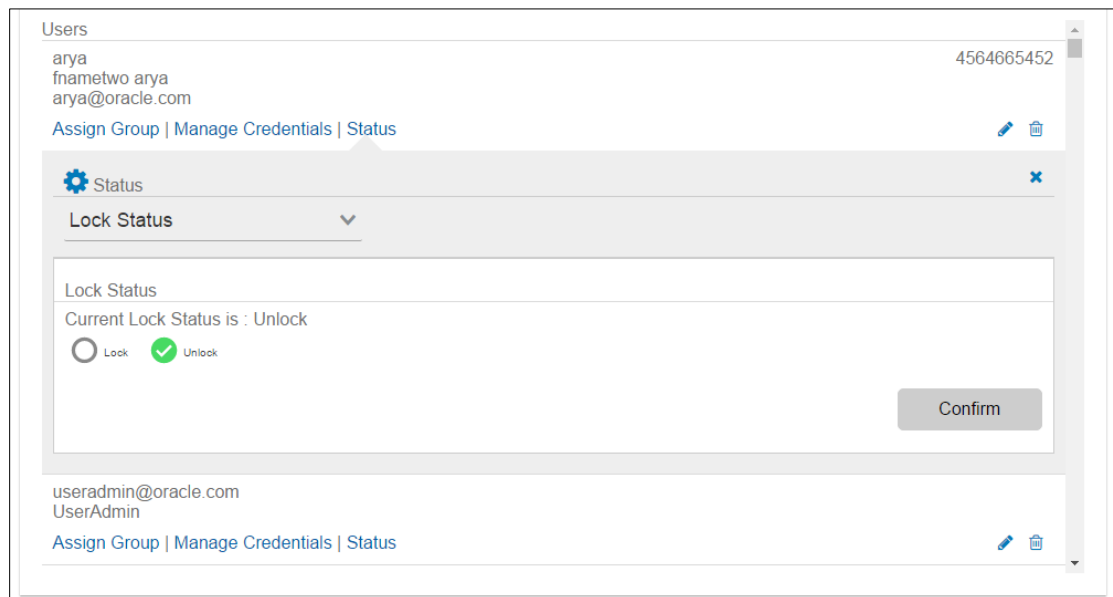
### How to reach here:

*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
<b>User Status</b>	The current status of the user. The user can either be Activated or Deactivated.
<b>Lock Status</b>	The current status of the user. The status can be: <ul style="list-style-type: none"> <li>• Lock</li> <li>• Unlock</li> </ul>

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
<b>Name</b>	Name of the limit group.
<b>Description</b>	Description of the limit group.
<b>Currency</b>	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

The screenshot shows the 'Limits' application interface. At the top, there is a navigation bar with a logo on the left, the title 'Limits' in the center, and a user profile icon on the right. Below the navigation bar, there is a breadcrumb trail: 'Limit Group | Events | Limits'. The main content area is titled 'Limit Group' and contains a form with three input fields: 'Limit Group Id', 'Limit Group Name', and 'Limit Group Description'. To the right of these fields are 'Search' and 'Reset' buttons. Below the main form, there is a modal window titled 'Create Limit Group' with a close button (X). This modal contains three fields: 'Name' with the value 'Limit Group1', 'Description' with the value 'Limit Group1', and 'Currency' with a dropdown menu showing 'GBP'. At the bottom of the modal are 'Create' and 'Cancel' buttons.

### Field Description

Field Name	Description
<b>Name</b>	Name of the limit group.
<b>Description</b>	Description of the limit group.
<b>Currency</b>	Currency of the limit group.

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

## 6.2 View Limit Group

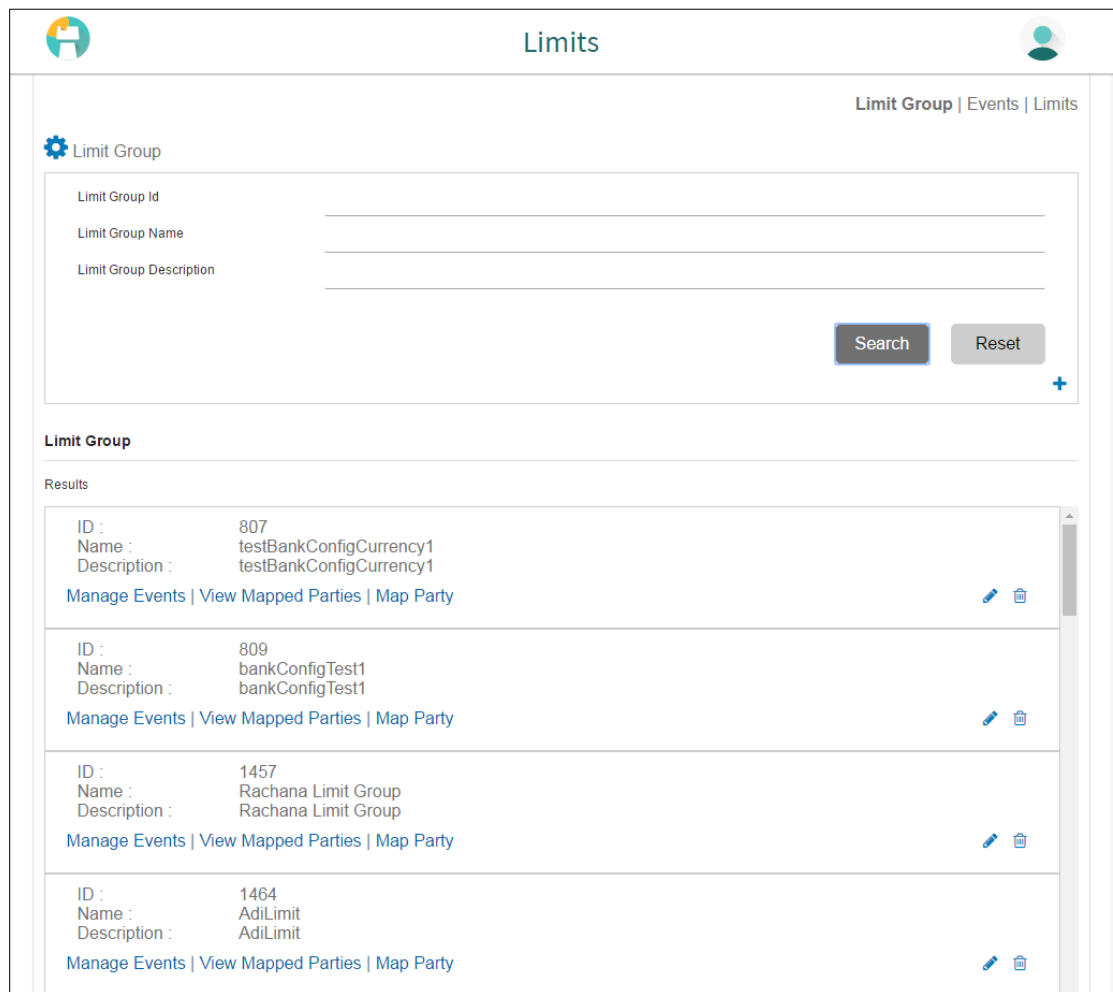
Using this option, bank administrator can search for particular limit groups based on different search parameters. The search results displays a list of particular limit group based on different search filters selected. Panel size depends on the number of limit group in the search list meeting the search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



The screenshot displays the 'Limits' application interface. At the top, there is a navigation bar with a home icon, the title 'Limits', and a user profile icon. Below the navigation bar, there is a breadcrumb trail: 'Limit Group | Events | Limits'. A search form is located below the breadcrumb trail, featuring a gear icon and the text 'Limit Group'. The form has three input fields: 'Limit Group Id', 'Limit Group Name', and 'Limit Group Description'. To the right of the form are 'Search' and 'Reset' buttons, and a plus sign icon. Below the search form, there is a section titled 'Limit Group' with a 'Results' sub-header. The results are displayed in a table-like format with four rows, each representing a limit group. Each row includes the ID, Name, and Description, followed by a link to 'Manage Events | View Mapped Parties | Map Party' and edit/delete icons.

ID	Name	Description	Actions
807	testBankConfigCurrency1	testBankConfigCurrency1	<a href="#">Manage Events</a>   <a href="#">View Mapped Parties</a>   <a href="#">Map Party</a> [Edit] [Delete]
809	bankConfigTest1	bankConfigTest1	<a href="#">Manage Events</a>   <a href="#">View Mapped Parties</a>   <a href="#">Map Party</a> [Edit] [Delete]
1457	Rachana Limit Group	Rachana Limit Group	<a href="#">Manage Events</a>   <a href="#">View Mapped Parties</a>   <a href="#">Map Party</a> [Edit] [Delete]
1464	AdiLimit	AdiLimit	<a href="#">Manage Events</a>   <a href="#">View Mapped Parties</a>   <a href="#">Map Party</a> [Edit] [Delete]

**Field Description**

<b>Field Name</b>	<b>Description</b>
<b>Limit Group ID</b>	The unique Id to search the specific limit group.
<b>Limit Group Name</b>	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

**Limit Group**

Results

ID :	807
Name :	testBankConfigCurrency1
Description :	testBankConfigCurrency1

[Map Events](#) | [View Mapped Parties](#) | [Map Party](#)
✎ 🗑

Map Events ✕

+

Search events to be mapped in the limit group. ✕

Event Id	<input style="width: 80%;" type="text"/>
Event Name	<input style="width: 80%;" type="text"/>
Description	<input style="width: 80%;" type="text"/>

Events

Results

ID :	BILLPAYMENT	+
Name :	Bill Payment	
Description :		

---

ID :	INTERNALFT	+
Name :	Internal Fund Transfer	
Description :		

Added Events

ID :	BILLPAYMENT	
Name :	Bill Payment	
Description :		

[Manage Limits](#) 🗑





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ID :	EXTPAYMENT	
Name :	External Transfer	
Description :		

[Manage Limits](#) 🗑

**Field Description**

<b>Field Name</b>	<b>Description</b>
<b>Event Id</b>	Id of event.
<b>Event Name</b>	Name of event.
<b>Event Description</b>	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

The screenshot displays the 'Limits' application interface. At the top, there is a search form for 'Limit Group' with fields for 'Limit Group Id', 'Limit Group Name', and 'Limit Group Description', and 'Search' and 'Reset' buttons. Below this, the 'Limit Group' section shows search results for a group with ID 1464, Name 'AdiLimit', and Description 'AdiLimit'. It includes links for 'Map Events', 'View Mapped Parties', and 'Map Party'. A modal window titled 'View Mapped Parties' is open, showing a search form for 'Party ID' and a list of results with checkboxes and a 'Delete' button.

**Limit Group Search Form:**

- Limit Group Id: \_\_\_\_\_
- Limit Group Name: \_\_\_\_\_
- Limit Group Description: \_\_\_\_\_
- Buttons: Search, Reset

**Limit Group Results:**

- ID : 1464
- Name : AdiLimit
- Description : AdiLimit
- Links: [Map Events](#) | [View Mapped Parties](#) | [Map Party](#)

**View Mapped Parties Modal:**

- View Mapped Parties (Close button)
- Party ID: \_\_\_\_\_
- Buttons: Search, Reset
- Results:
  - Select All
  - Party ID: 10413200
  - Party ID: 10413234
  - Party ID: 10413171
  - Party ID: 10410933
  - Party ID: 10413176
- Button: Delete

## Field Description

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

- In the **Party ID** field, enter the party id to be search for that limit group.
- Click **Search**.
- 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:

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

#### Limits Group – Map Party

The screenshot displays the 'Limit Group' interface. At the top, it shows the 'Limit Group' header. Below that, the 'Results' section lists the following details: ID: 2863, Name: TxnLimit5, and Description: TxnLimit5. There are navigation links: 'Map Events', 'View Mapped Parties', and 'Map Party'. The 'Map Party' section is active, showing a 'Party Id' input field with the value '10413172'. There are 'Validate' and 'Reset' buttons next to the input field. Below this, there is a 'Map' button.

**Field Description**

<b>Field Name</b>	<b>Description</b>
<b>Party Id</b>	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.

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## 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

The screenshot displays the 'Limits' application interface. At the top, there is a search bar with 'Limit Group Id', 'Limit Group Name', and 'Limit Group Description' fields, and 'Search' and 'Reset' buttons. Below the search bar, the 'Limit Group' section shows search results. The first result is for 'Ketki Limit Group' (ID: 2317). An 'Edit Limit Group' modal is open over this result, showing the current values: Name: Ketki Limit Group, Description: Ketki Limit Group, and Currency: GBP. The modal has 'Apply' and 'Cancel' buttons. Below the modal, another result for 'SAGAR2103' (ID: 2507) is visible.

### 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**

<b>Field Name</b>	<b>Description</b>
<b>Name</b>	Name of the limit group.
<b>Description</b>	Description of the limit group.
<b>Currency</b>	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
------------	-------------

<b>Limit Name</b>	Name of the limit
-------------------	-------------------

<b>Limit Description</b>	Description of the limit.
--------------------------	---------------------------

Field Name	Description
<b>Is User Changeable</b>	Indicates whether limit is changeable by user. The options are: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
<b>Currency</b>	Currency in which the limit is to be created.
<b>Minimum Amount</b>	The minimum amount limit in which a transaction of the specific type can be initiated.
<b>Maximum Amount</b>	The maximum amount limit in which a transaction of the specific type can be initiated.
<b>Limit Type</b>	Type of limit. The options are: <ul style="list-style-type: none"> <li>• Transaction Limit</li> <li>• Duration Limit</li> </ul>
<b>Start Date</b>	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

The screenshot displays the 'Limits' maintenance interface. At the top, there is a navigation bar with a home icon, the title 'Limits', and a user profile icon. Below the navigation bar, there are links for 'Limit Group | Events | Limits'. A search filter section contains a gear icon labeled 'Limits', a dropdown for 'Limit Type' set to 'TRANSACTION LIMIT', a text input for 'Limit Name', and a dropdown for 'Currency' set to 'GBP'. 'Search' and 'Reset' buttons are present, along with a plus sign icon. Below the search filters, a table lists existing limits. Each row shows the ID, Name, Type, and Currency, with edit and delete icons to the right.

ID	Name	Type	Currency	Actions
2308	obdpxune	TRAN	GBP	[Edit] [Delete]
2315	Ketki Transaction Limit	TRAN	GBP	[Edit] [Delete]
2341	AshokTransLimit	TRAN	GBP	[Edit] [Delete]
2865	TxnLimit05	TRAN	GBP	[Edit] [Delete]



**Field Description**

<b>Field Name</b>	<b>Description</b>
<b>Limit Type</b>	Type of limit. The options are: <ul style="list-style-type: none"> <li>• Transaction Limit</li> <li>• Duration Limit</li> </ul>
<b>Limit Name</b>	Name of the limit
<b>Currency</b>	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:

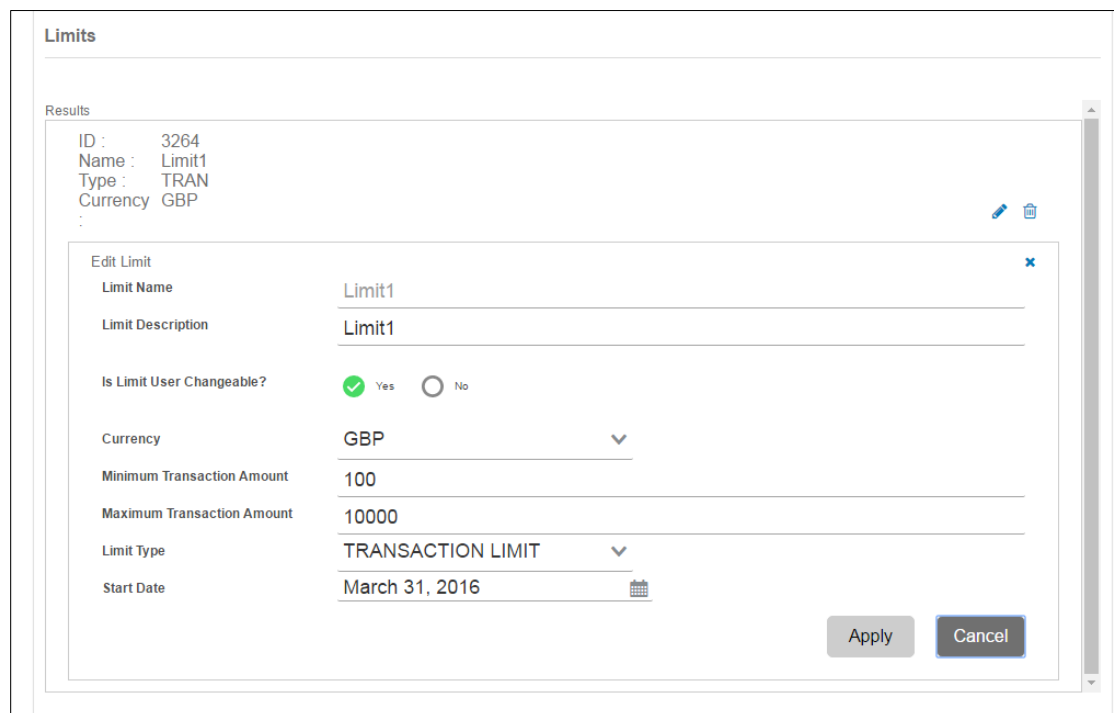
*Admin Dashboard > Limits > Limits*

### 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



**Limits**

Results

ID : 3264  
Name : Limit1  
Type : TRAN  
Currency : GBP

**Edit Limit**

Limit Name: Limit1

Limit Description: Limit1

Is Limit User Changeable?  Yes  No

Currency: GBP

Minimum Transaction Amount: 100

Maximum Transaction Amount: 10000

Limit Type: TRANSACTION LIMIT

Start Date: March 31, 2016

Apply Cancel

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

The screenshot shows the 'Limits' application interface. At the top, there is a header with the title 'Limits' and a user profile icon. Below the header, there is a breadcrumb trail: 'Limit Group | Events | Limits | Service'. On the left side, there is a sidebar with a gear icon and the text 'Events'. The main content area contains a search form with three input fields: 'Event Id', 'Event Name', and 'Description'. To the right of the form are two buttons: 'Search' and 'Reset'. Below the search form, there is a section titled 'Events' with a sub-section 'Results'. The results are displayed in a table with four rows, each showing an event ID, name, and description.

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

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

### Field Description

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

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

The screenshot shows the 'Limits' application interface. At the top, there is a header with a logo on the left, the title 'Limits' in the center, and a user profile icon on the right. Below the header, a breadcrumb trail reads 'Limit Group | Events | Limits | Service'. A 'Service' section is highlighted with a gear icon. It contains a search bar with the label 'Service Name', a 'Search' button, and a 'Reset' button. Below the search bar, the 'Service' section displays search results in a table format. The results are as follows:

Results	
Name :	com.ofss.digx.app.payment.service.transfer.BillPayment.create
Event Id :	BILLPAYMENT
Event Name :	Bill Payment
Ref DTO :	com.ofss.digx.app.payment.dto.transfer.BillPaymentCreateRequestDTO
Ref Attribute:	TransferDetails.Amount
Enabled :	true
Name :	com.ofss.digx.app.payment.service.transfer.BillPayment.updateStatus
Event Id :	BILLPAYMENT
Event Name :	Bill Payment
Ref DTO :	
Ref Attribute:	
Enabled :	false
Name :	com.ofss.digx.app.payment.service.transfer.BillPaymentAuthentication.validateToken
Event Id :	BILLPAYMENT
Event Name :	Bill Payment

### 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.