Oracle Banking Digital Experience

System Configuration User Manual
Release 17.2.0.0.0

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System Configuration 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=accandid=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=accandid=info or visit

http://www.oracle.com/pls/topic/lookup?ctx=accandid=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 17.2.0.0.0, refer to the following documents:

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

2. System Configuration

System configuration is an administrative maintenance to define the details required to set up the system.

Post successful installation of OBDX i.e. once the Day 0 setup is done, the system administrator will have a wizard to define the configuration details required for the system setup.

Following are the components that can be defined as part of system configuration.

- Host Details
- Bank Details
- Branch Details
- Module Details

As part of module details, the set of modules listed will be based on the host system selected.

Features supported in application

System Configuration allows the System Administrator to:

- Set-up Configuration
- View Configuration
- Edit Configuration

How to reach here:

Dashboard > System Configuration

2.1 Set-up System Configuration – Host System UBS

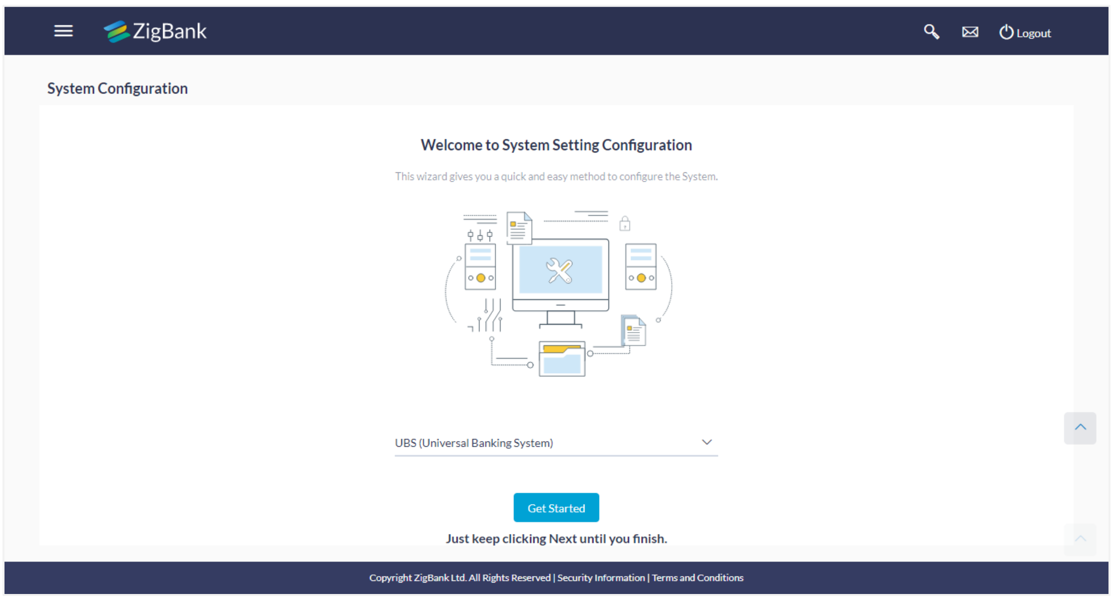
Once the OBDX installation is complete, the system administrator will login into the system and he/she will have a configuration wizard to define the details required for setup.

System configuration is a onetime setup and once defined, the administrator can view/edit the details.

To set-up the system configuration:

- The Administrator logins in to the application using valid login credentials.
- The **System Configuration** screen with welcome note is displayed.

System Configuration

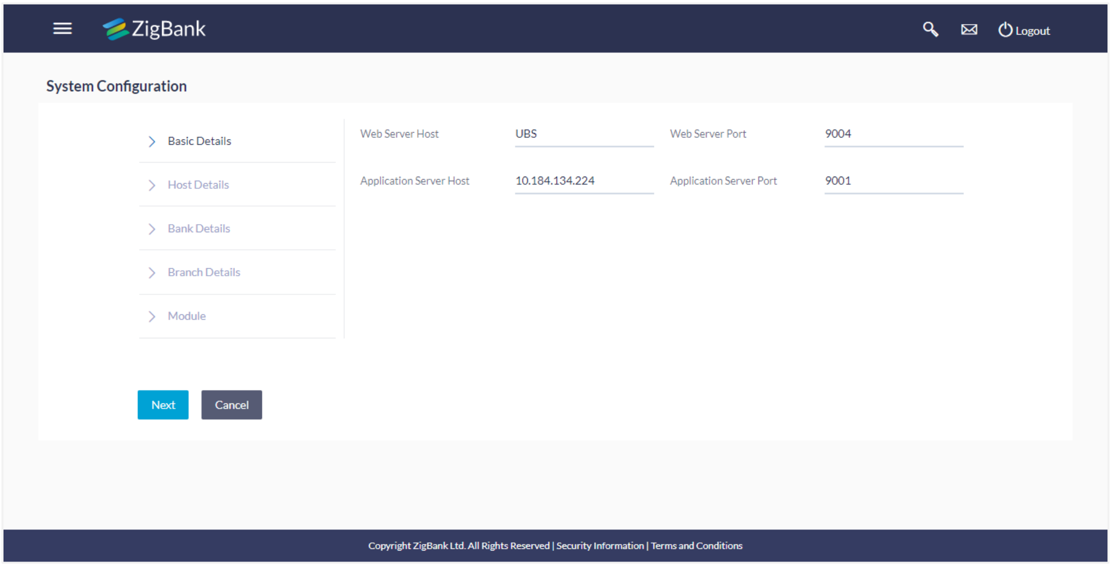


Field Description

Field Name	Description
Select Host	You need to select the host system for the channel banking platform.

- Select the host from the list to get started with system configuration set up.
- Click **Get Started**. The **System Configuration – Basic Details** screen is displayed.

2.1.1 System Configuration – Basic Details

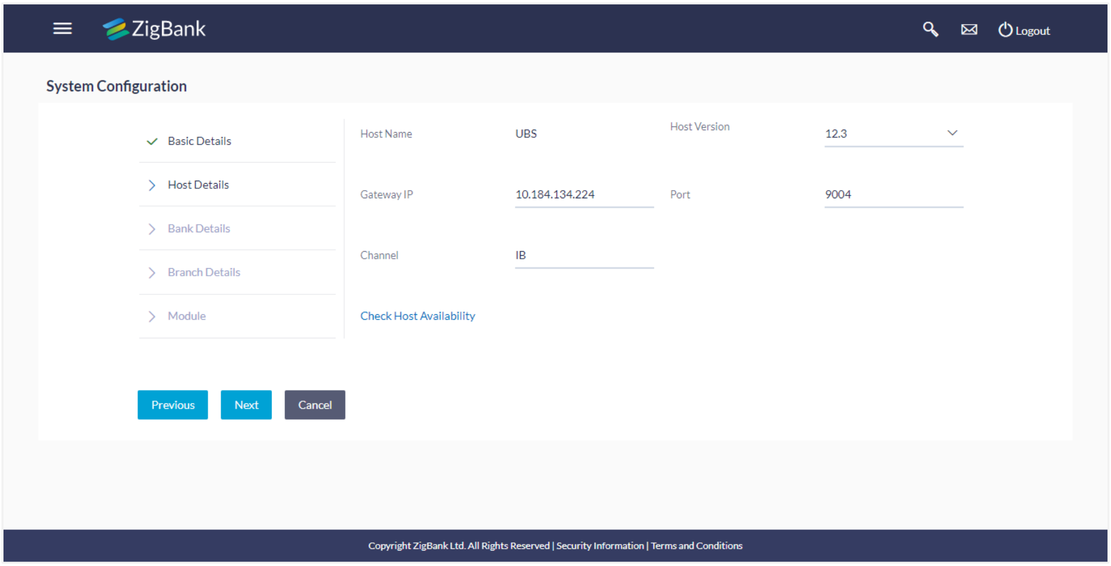


Field Description

Field Name	Description
Web Server Host	Specify the web-server host.
Web Server Port	Enter the web server port number.
Application Server Host	Enter the address of the application server host.
Application Server Port	Enter the application server port number

- In the **Web Server Host** field, enter the host name of the web server.
- In the **Web Server Port** field, enter the port number of the web server.
- In the **Application Server Host** field, enter the address of the application server host.
- In the **Application Server Port** field, enter the port number of the application server port.
- Click **Next**. The **System Configuration – Host Details** screen appears.
  OR
  Click **Cancel** to cancel the setup process.

2.1.2 System Configuration – Host Details

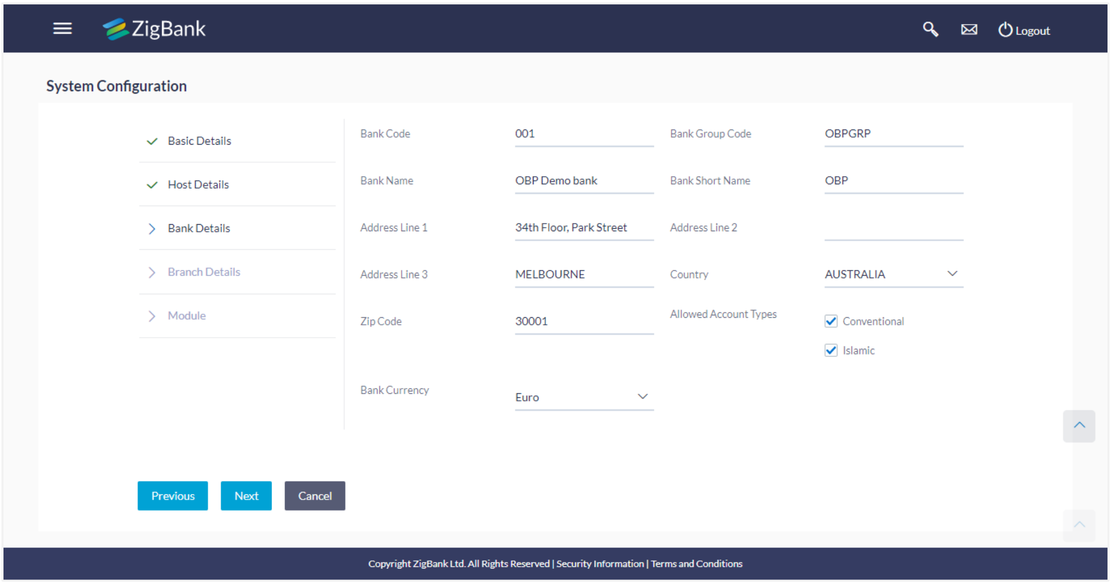


Field Description

Field Name	Description
Host Name	The host system as selected for the channel banking platform is displayed.
Host Version	Select the version number of the host system.
Gateway IP	Specify the Gateway IP of the selected host system.
Port	Specify the port for the host system.
Channel	Specify the channel as **'IB'** to access the application.

- From the **Host Version** list, select the version of the host.
- In the **Gateway IP** field, enter the default gateway IP address.
- In the **Port** field, enter the port id.
- In the **Channel** field, enter the channel to access the application.
- Click the **Check Host Availability** link to check the host availability. The message of successful testing appears.
- Click **Next**. The **System Configuration – Bank Details** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.1.3 System Configuration – Bank Details



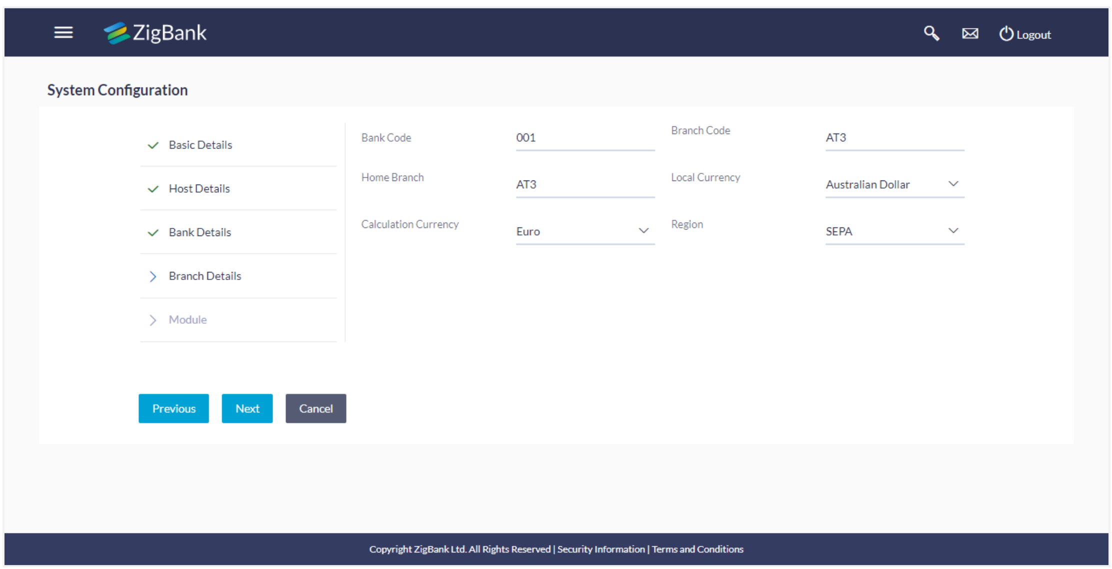
Field Description

Field Name	Description
Bank Code	Enter unique code to identify the bank.
Bank Group Code	Enter the Bank Group Code.
Bank Name	Enter the name of the bank.
Bank Short Name	Enter the short name of the bank.
Address - Line 1 - 3	Enter the address details of the bank.
Country	Enter the country in which the bank is located/headquartered.
ZIP Code	Enter the zip code of the bank.
Allowed Account Types	Select the allowed account types applicable for the bank. The options can be: • Conventional • Islamic
Bank Currency	Specify the default currency applicable for the bank.

- In the **Bank Code** field, enter the code of the bank.
- In the **Bank Group Code** field, enter the group code of the bank.
- In the **Bank Name** field, enter the name of the bank.

- In the **Bank Short Name** field, enter the short name of the bank.
- In the **Address Line 1- 3** field, enter the address details of the bank
- From the **Country** list, select the country in which the bank is located.
- In the **ZIP Code** field, enter the city/ zip code where bank is located.
- Select the **Allowed Account Types** check box. You can select Conventional / Islamic / Both
- Click **Next**. The **System Configuration – Branch Details** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.1.4 System Configuration – Branch Details

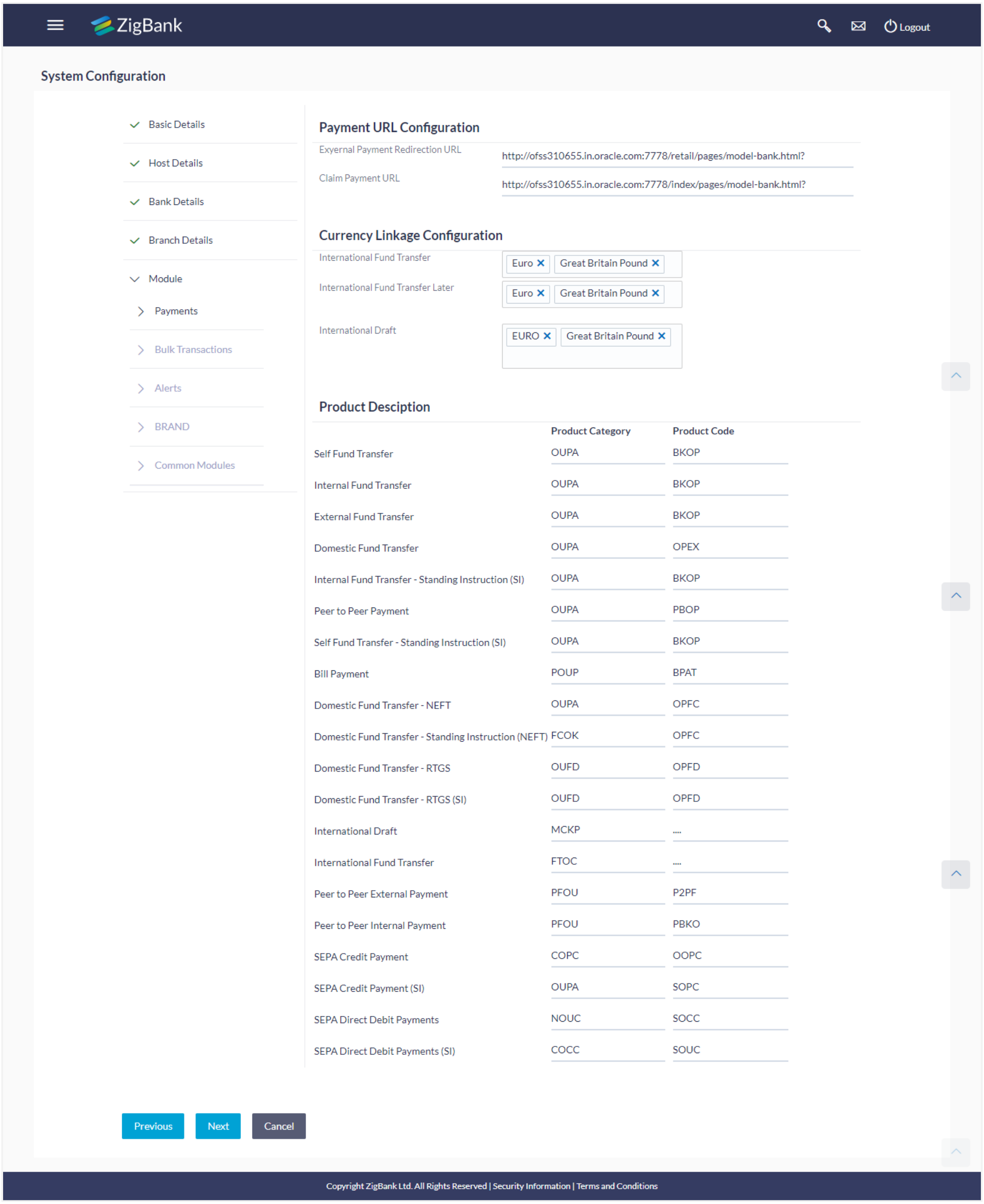


Field Name	Description
Bank Code	Enter the unique code to identify the bank. You should specify the same bank code as specified in the previous section
Branch Code	Enter the bank branch code.
Home Branch	Specify the home branch for the bank.
Local Currency	Select the local currency applicable for the bank.
Calculation Currency	Select the calculation currency applicable for the bank.

Field Name	Description
Region	Select the region of payment. The options are: • India • UK • SEPA

- In the **Bank Code** field, enter the code of the bank.
- In the **Branch Code** field, enter the code of the bank branch.
- In the **Home Branch** field, enter the code of the home branch of the bank.
- From the **Local Currency** list, select the local currency of the bank.
- From the **Calculation Currency** list, select the calculation currency of the bank.
- From the **Region** list, select the appropriate region for payments.
- Click **Next**. The **System Configuration – Module - Payments** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.1.5 System Configuration – Module - Payments

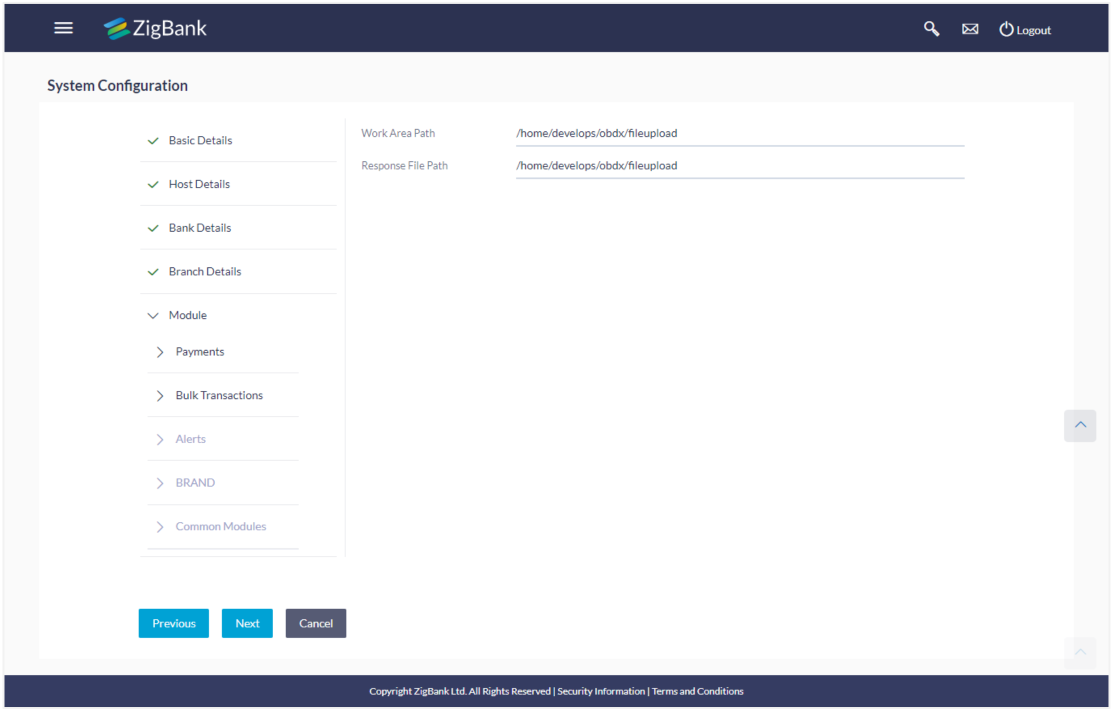


Field Description

Field Name	Description
Payment URL Configuration	
External Payment Redirection URL	Enter the URL for external payments.
Claim Payment URL	Enter the claim payment URL for the beneficiary to claim money transferred by the initiator.
Currency Linkage Configuration	
International Fund Transfer	Specify the currencies that are applicable for international fund transfer transactions.
International Fund Transfer Later	Specify the currencies that are applicable for international fund transfer transactions on a later date.
International Draft	Specify the currencies that are applicable for international draft transactions.
Product Description	It will have a list of payment transactions against which the product category and code can be specified.
Product Category	Specify the product category against the required transactions.
Product Code	Specify the product code against the required transactions.

- In the **External Payment Redirection URL** field, enter the web address.
- In the **Claim Payment URL** field, enter the URL to claim the payments by the beneficiary that were transferred by the initiator.
- In the **Currency Linkage Configuration** section, enter the currencies for International Fund Transfer, International Fund Transfer (Pay Later) and International Draft transactions.
- In the **Product Description** section, enter the Product Category and Product Code against the required transactions list.
- Click **Next**. The **System Configuration – Module – Bulk Transactions** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.1.6 System Configuration – Module – Bulk Transactions



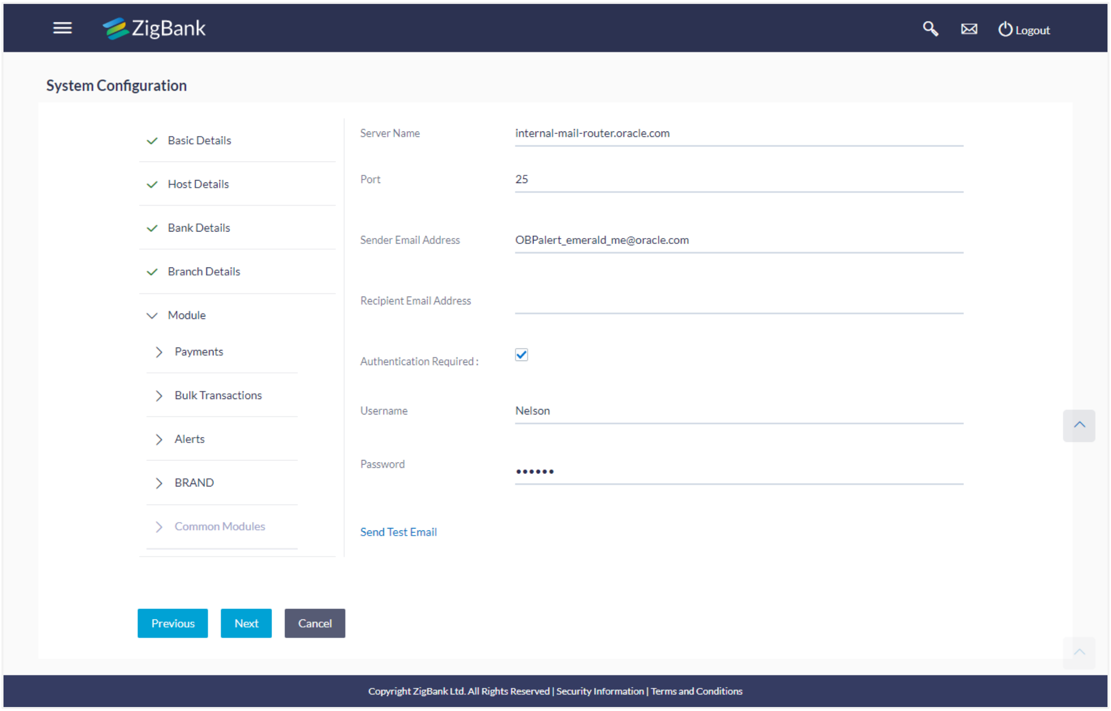
Field Description

Field Name	Description
Work Area Path	Specify the work area path for bulk transactions.
Response File Path	Specify the response file path for bulk transactions.

- In the **Work Area Path** field, enter the path of the working area.
- In the **Response File Path** field, enter the path of the response file.
- Click **Next**. The **System Configuration – Module – Alerts** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

Note: The user needs to ensure that there is a corresponding folder for bulk files created on the file server at the specified file path.

2.1.7 System Configuration – Module – Alerts



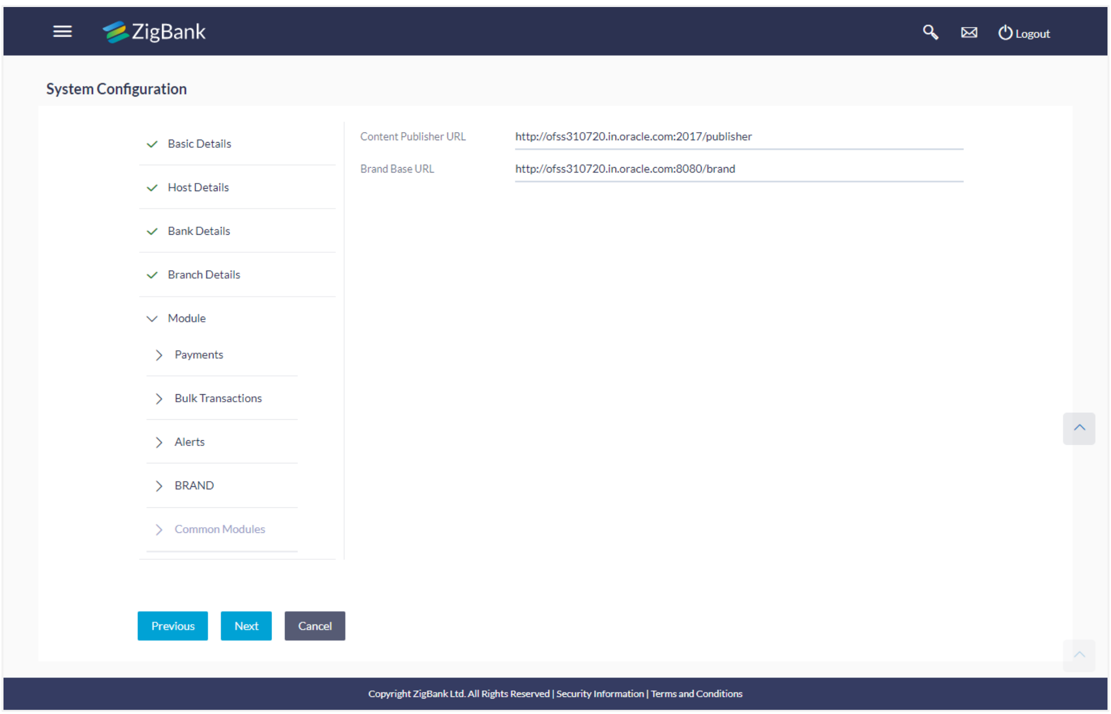
Field Description

Field Name	Description
Server Name	Enter the name of the server.
Port	Enter the port number
Sender Email Address	Specify the email address from which alerts will be sent to the recipients.
Recipient Email Address	Specify the email address of recipient for testing purpose.
Authentication Required	Select the check box, if authentication is required.
User Name	Specify the user name of the user if mapped to the sender email address. It could be the same as sender email address.
Password	Enter the password corresponding to the user name.
Send Test Email	Click to trigger and test the alert configuration by sending test email to the defined recipient email address.

- In the **Server Name** field, enter the name of the mail server.
- In the **Port** field, enter the port id.

- In the **Sender Email Address** field, enter the email address of the sender which needs to appear when emails are sent to the recipient.
- In the **User Name** and **Password** field, enter the user name and password.
- Select the **Send Test Email** check box, to send a test email.
- Click **Next**. The **System Configuration – Module – BRAND** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.1.8 System Configuration – Module – BRAND



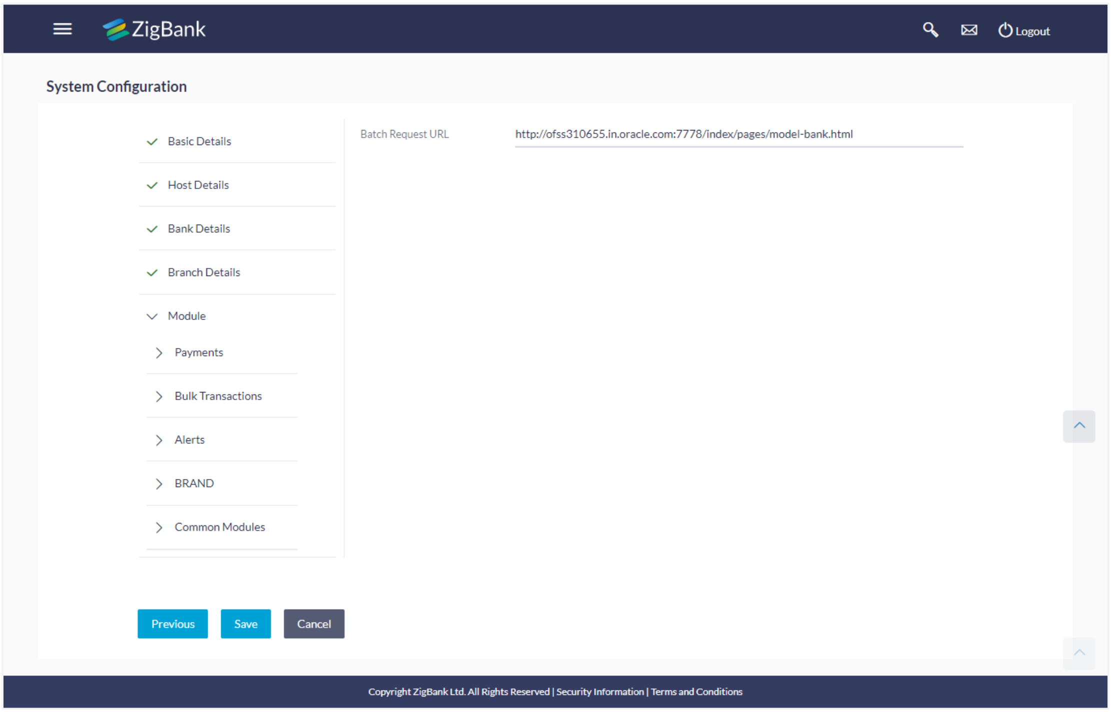
Field Description

Field Name	Description
Content Publisher URL	Specify the URL for content publishing.
Brand Base URL	Specify the Brand Base URL.

- In the **Content Publisher URL** field, enter the URL for content publishing.
- In the **Brand Base URL** field, enter the brand base URL.
- Click **Next**. The **System Configuration – Module – Common Modules** screen appears.
  OR
  Click **Previous** to go to the previous screen.

OR
Click **Cancel** to cancel the setup process.

2.1.9 System Configuration – Module – Common Modules



Field Description

Field Name	Description
Batch Request URL	Specify the URL for batch request processing.

- Enter the **Batch Request URL**.
- Click **Save** to save the entered details.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.
- The **System Configuration – Review** screen appears. Verify the details and click **Confirm**.
  OR
  Click **Cancel** to cancel the setup process.

  The success message of saving the system configuration appears along with the status.

2.2 System Configuration – View and Edit

Using this option the system administrator can view and edit the system configuration details that have already been created.

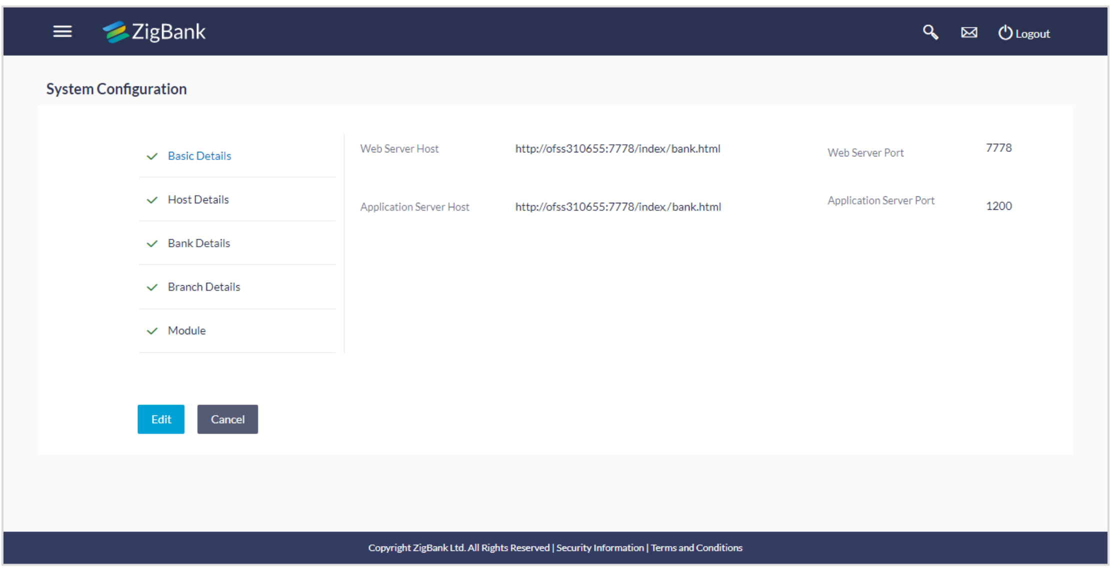
2.2.1 System Configuration - Basic Details - View

Using this option system administrator can view and edit the basic details of the system.

To view the basic details of the system:

- Click on **System Configuration** option on the dashboard and navigate to the basic details. The default option is **'View'**.

Basic Details - View



Field Description

Field Name	Description
Web Server Host	Displays the web server host details.
Web Server Port	Displays the port of the web server.
Application Server Host	Displays the application server host details.
Application Server Port	Displays the port of the application server.

- Click **Edit** to edit the Basic Details. The **System Configuration - Basic Details** screen appears in editable form.

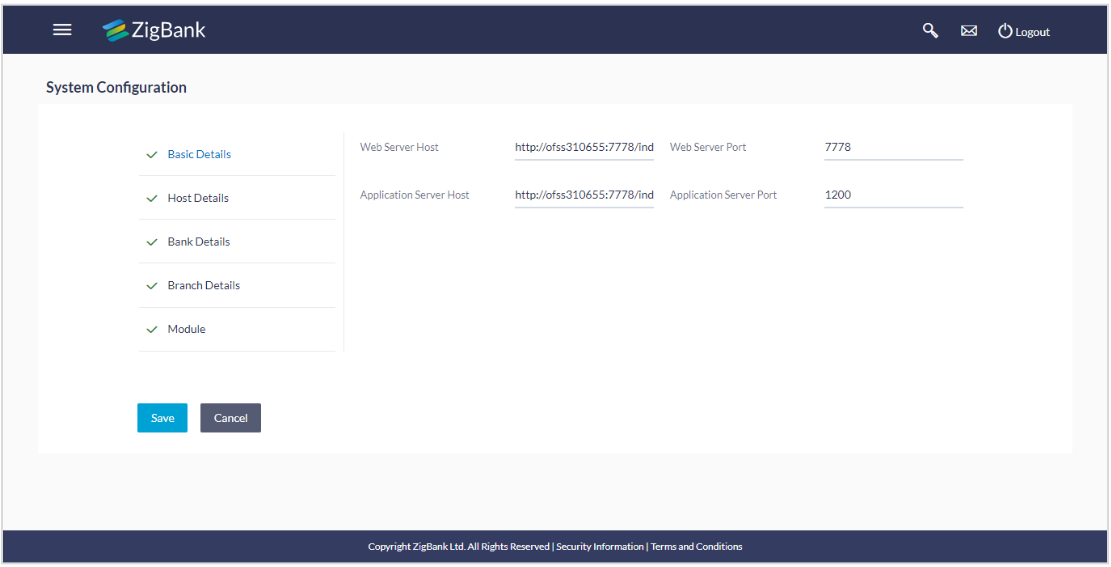
2.2.2 System Configuration - Basic Details - Edit

Using this option, system administrator can edit the basic details.

To edit the basic details:

- In the **System Configuration - Basic Details** screen, click **Edit**. The **System Configuration - Basic Details** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Basic Details - Edit



Field Description

Field Name	Description
Web Server Host	Displays the web server host details and available for edit.
Web Server Port	Displays the port of the web server and available for edit.
Application Server Host	Displays the application server host details and available for edit.
Application Server Port	Displays the port of the application server and available for edit.

- In the **Web Server** Host field, edit the host name of the web server if required.
- In the **Web Server Port** field, edit the port number of the web server if required.
- In the **Application Server Host** field, edit the host name of the application server if required.
- In the **Application Server Port** field, edit the port number of the application server if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.

- The **System Configuration - Basic Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Bank Details, Branch Details or Module tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

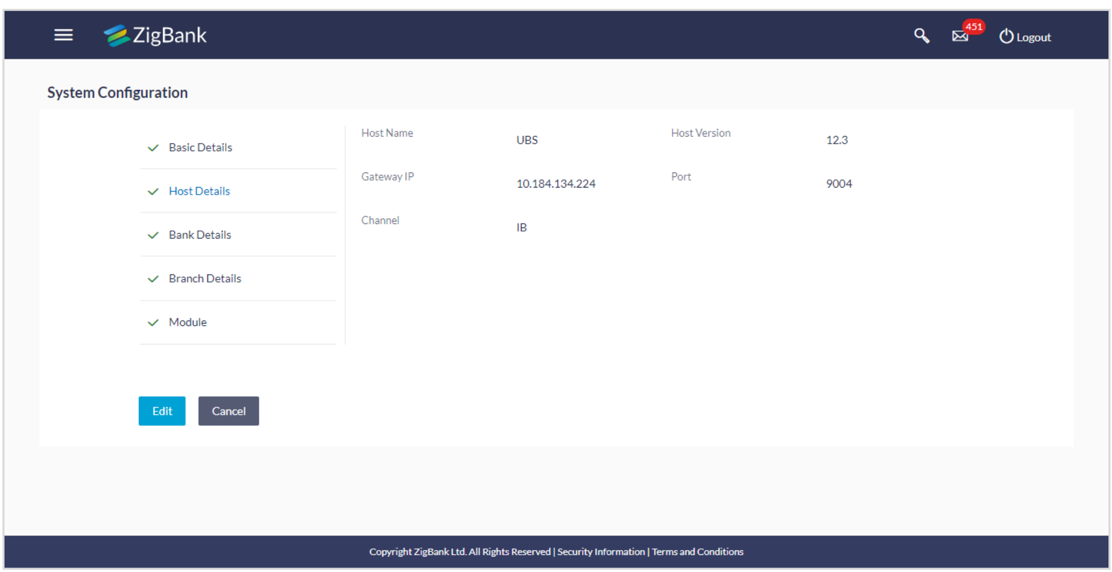
2.2.3 System Configuration - Host Details - View

Using this option System Administrator maintains the host configuration. These details once defined can be viewed and edited using this transaction.

To view the host details:

- Click on **System Configuration** option on the dashboard and navigate to the host details tab. The default option is **'View'**.

Host Details - View



Field Description

Field Name	Description
Host Name	Displays the host name of the channel banking platform.
Host Version	Displays the host version of the channel platform.
Gateway IP	Displays the Gateway IP of the selected host system.
Port	Displays the port of the host system.

Field Name	Description
Channel	Displays the channel to access the application.

- Click **Edit** to edit the Host Details. The **System Configuration - Host Details** screen appears in editable form.

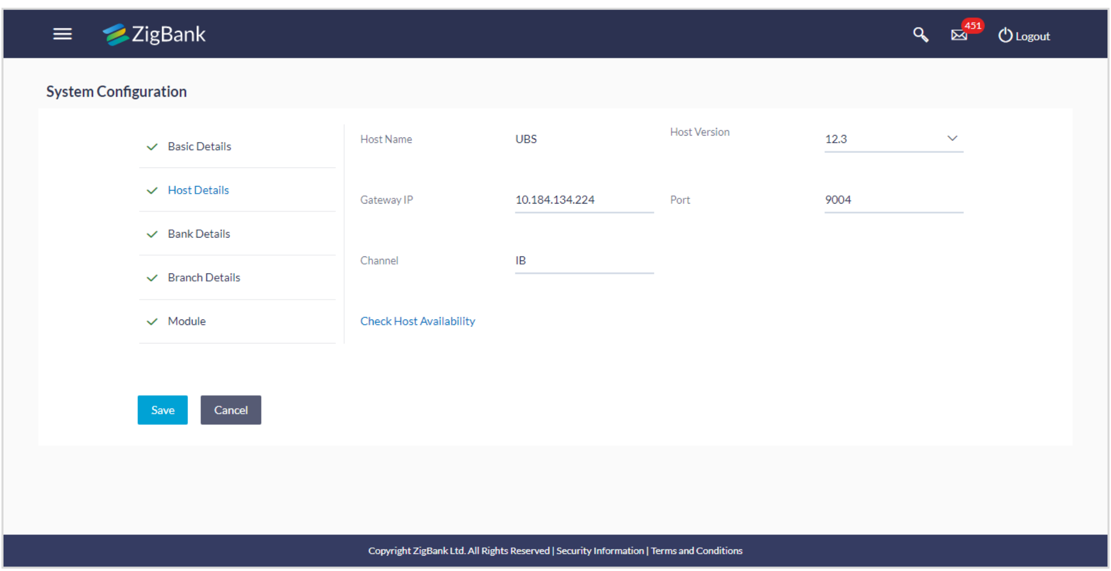
2.2.4 System Configuration - Host Details - Edit

Using this option, system administrator can edit the host details.

To edit the host details:

- In the **System Configuration - Host Details** screen, click **Edit**. The **System Configuration - Host Details** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Host Details - Edit



Field Description

Field Name	Description
Host Name	Displays the host name of the channel banking platform.
Host Version	Displays the host version of the channel platform and available for edit.
Gateway IP	Displays the Gateway IP of the selected host system and available for edit.
Port	Displays the port of the host system and available for edit.

Field Name	Description
Channel	Displays the channel to access the application.
Check Host Availability	Click to check if the Host is available.

- From the **Host Version** list, select the version of the host, if required.
- In the **Gateway IP** field, edit the gateway IP address of the host.
- In the **Port** field, edit the port number of the server.
- In the **Channel** field, edit the channel to access the application.
- Click the **Check Host Availability** link to check the host availability. The message of successful testing appears.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Host Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Bank Details, Branch Details or Module tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

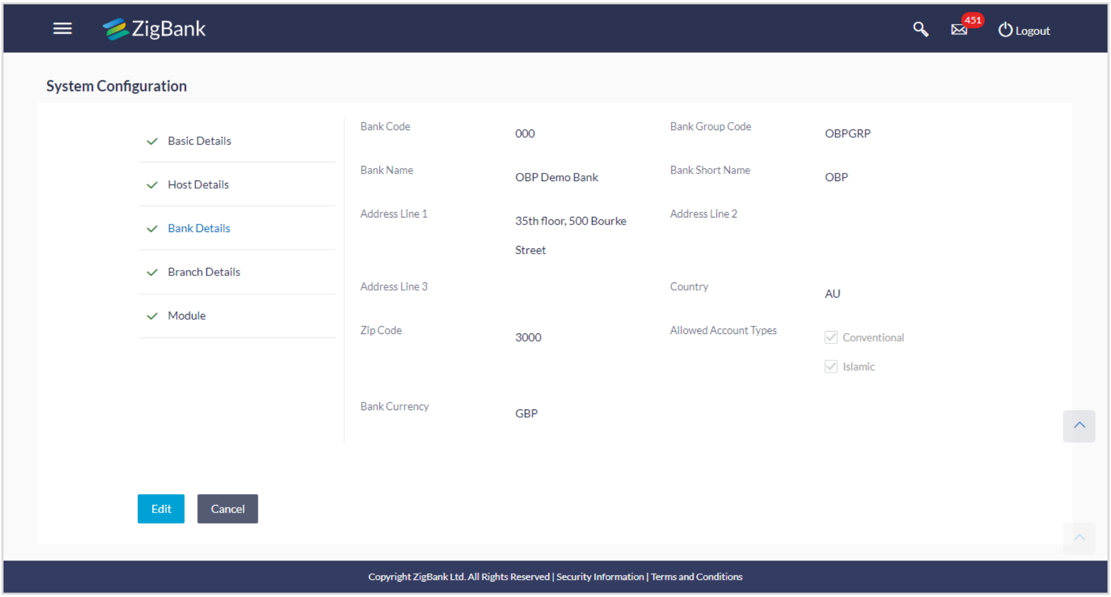
2.2.5 System Configuration - Bank Details - View

Using this option System Administrator maintains the bank details. These details once defined can be viewed and edited using this transaction.

To view the bank details:

Click on System Configuration option on the dashboard and navigate to the bank details tab. The default option is ‘View’.

Bank Details - View



Field Description

Field Name	Description
Bank Code	Displays the bank code as defined
Bank Group Code	Displays the bank group code as defined.
Bank Name	Displays the name of the bank as defined.
Bank Short Name	Displays the short name of the bank as defined.
Address - Line 1 - 3	Displays the address of the bank as defined.
Country	Displays the country of the bank.
ZIP Code	Displays the ZIP code of the bank.
Allowed Account Types	Displays the allowed account types as defined. The options could be: • Conventional • Islamic
Bank Currency	Displays the applicable bank currency.

- Click **Edit** to modify the Bank Details. The **System Configuration - Bank Details** screen appears in editable form.

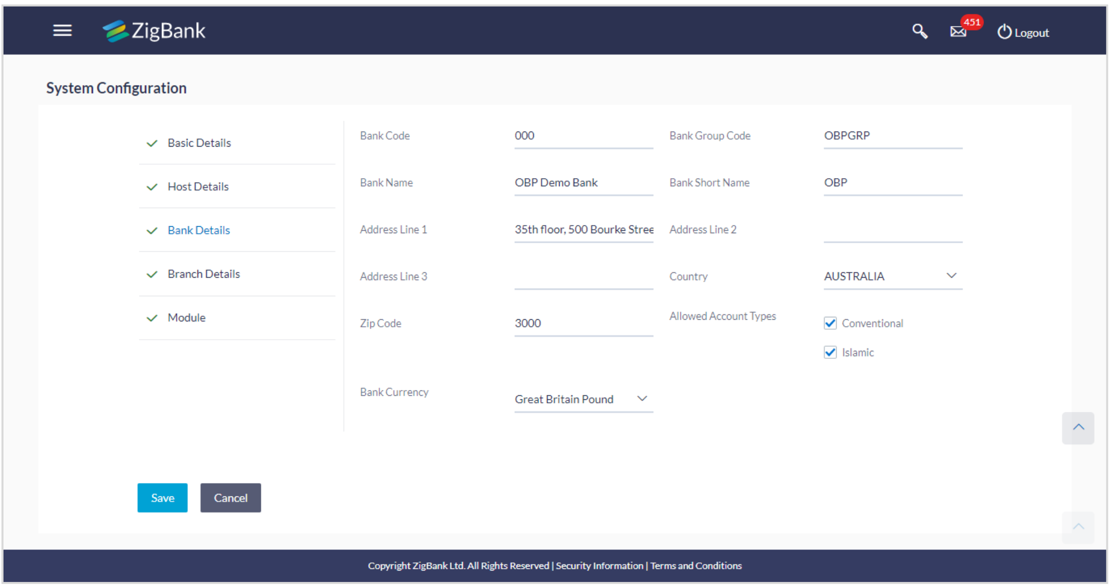
2.2.6 System Configuration - Bank Details - Edit

Using this option, system administrator can edit the bank details.

To edit the bank details:

- In the **System Configuration** screen, click **Bank Details** tab. The **System Configuration - Bank Details** screen appears.
- In the **System Configuration - Bank Details** screen, click **Edit**. The **System Configuration - Bank Details** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Bank Details - Edit



Field Description

Field Name	Description
Bank Code	Displays the bank code as defined and available for edit
Bank Group Code	Displays the bank group code as defined and available for edit.
Bank Name	Displays the name of the bank as defined and available for edit.
Bank Short Name	Displays the short name of the bank as defined and available for edit.
Address - Line 1 – 3	Displays the address of the bank as defined and available for edit.
Country	Displays the country of the bank and available for edit.
ZIP Code	Displays the ZIP code of the bank and available for edit.

Field Name	Description
Allowed Account Types	Displays the allowed account types as defined and available for edit. The options could be: • Conventional • Islamic • Both
Bank Currency	Displays the applicable bank currency and available for edit.

- In the **Bank Code** field, edit the code of the bank.
- In the **Bank Group Code** field, edit the group code of the bank.
- In the **Bank Name** field, edit the name of the bank.
- In the **Bank Short Name** field, edit the short name of the bank.
- In the **Address Line 1-3** field, edit the address of the bank.
- From the **Country** list, edit the country of the bank if required.
- In the **ZIP Code** field, edit the zip code of the bank if required.
- Select/ de-select the **Allowed Account Types** check box, to edit the selection, if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Bank Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

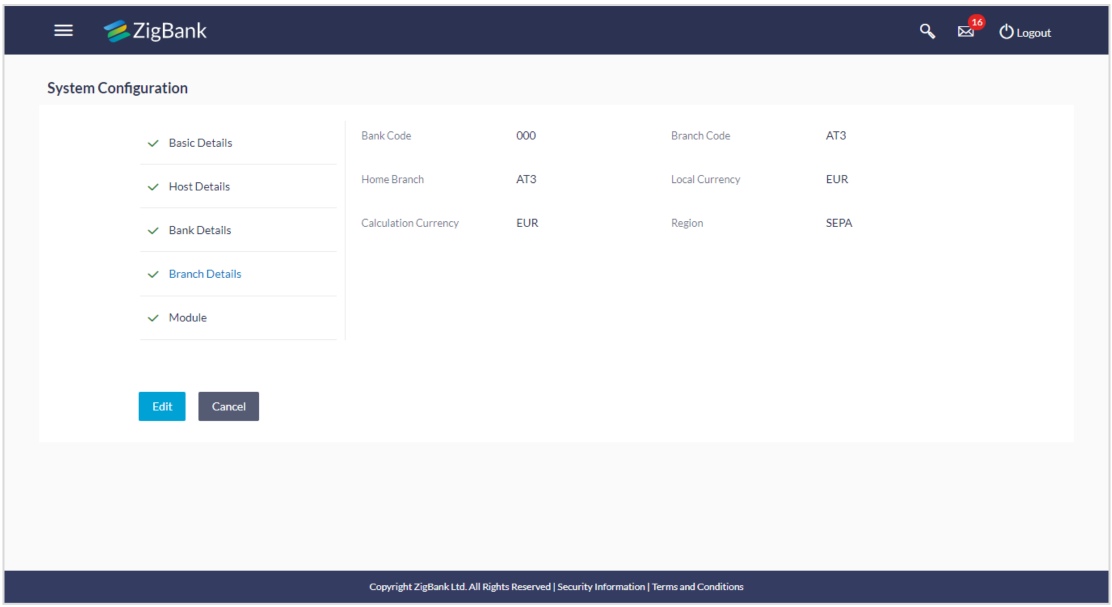
2.2.7 System Configuration - Branch Details - View

Using this option System Administrator maintains the branch details. These details once defined can be viewed and edited using this transaction.

To view the branch details:

Click System Configuration option on the dashboard and navigate to the branch details tab. The default option is 'View'

Branch Details - View



Field Description

Field Name	Description
Bank Code	Displays the unique code of the bank as defined.
Branch Code	Displays the bank branch code as defined.
Home Branch	Displays the home branch code as defined.
Local Currency	Displays the local currency as defined.
Calculation Currency	Displays the calculation currency as defined.
Region	Displays the region of bank payments as defined. The options are: • India • UK • SEPA

- Click **Edit** to edit the branch details. The **System Configuration - Branch Details** screen appears in editable form.

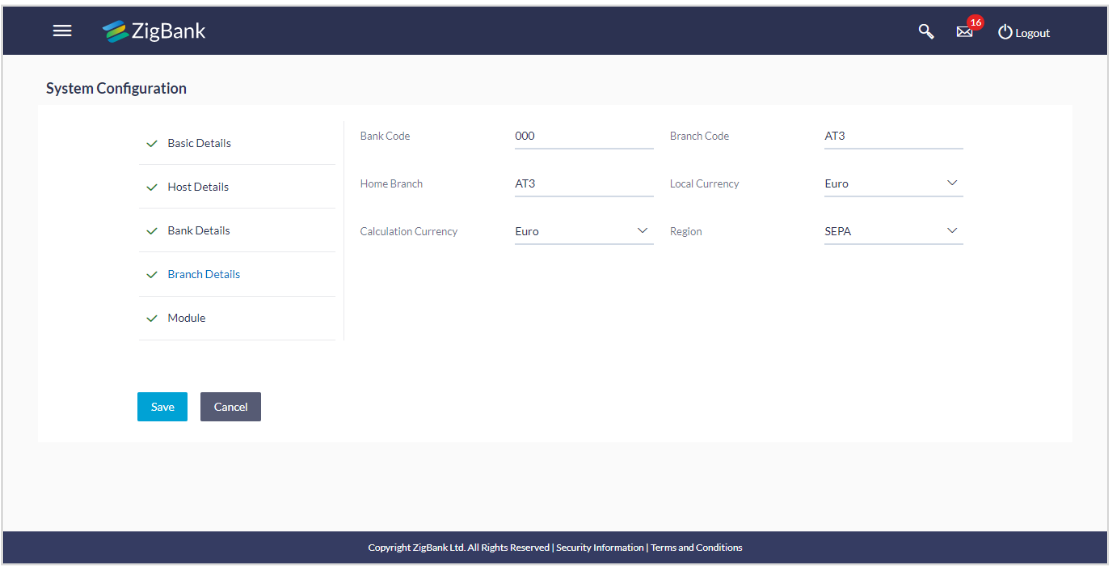
2.2.8 System Configuration - Branch Details - Edit

Using this option, system administrator can edit the branch details.

To edit the branch details:

- In the **System Configuration** screen, click **Branch Details** tab. The **System Configuration - Branch Details** screen appears.
- In the **System Configuration - Branch Details** screen, click **Edit**. The **System Configuration - Branch Details** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Branch Details - Edit



Field Description

Field Name	Description
Bank Code	Displays the unique code of the bank as defined.
Branch Code	Displays the bank branch code as defined and available for edit.
Home Branch	Displays the home branch code as defined and available for edit.
Local Currency	Displays the local currency as defined and available for edit.
Calculation Currency	Displays the calculation currency as defined and available for edit.

Field Name	Description
Region	Displays the region of bank payments as defined and available for edit. The options are: • India • UK • SEPA

- In the **Bank Code** field, edit the code of the bank.
- In the **Branch Code** field, edit the branch code of the bank.
- In the **Home Branch** field, edit the name of the home branch of the bank.
- From the **Local Currency** list, select the local currency of the bank branch.
- From the **Calculation Currency** list, select the calculation currency of the bank branch.
- From the **Region** list, select the appropriate region.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Branch Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

2.2.9 System Configuration - Module

The basic modules corresponding to the selected host, which is required to run the application are defined and configured by system administrator.

The modules are included depending on the type of host selected.

Following modules are configured:

- Payments
- Bulk Transactions
- Alerts
- BRAND

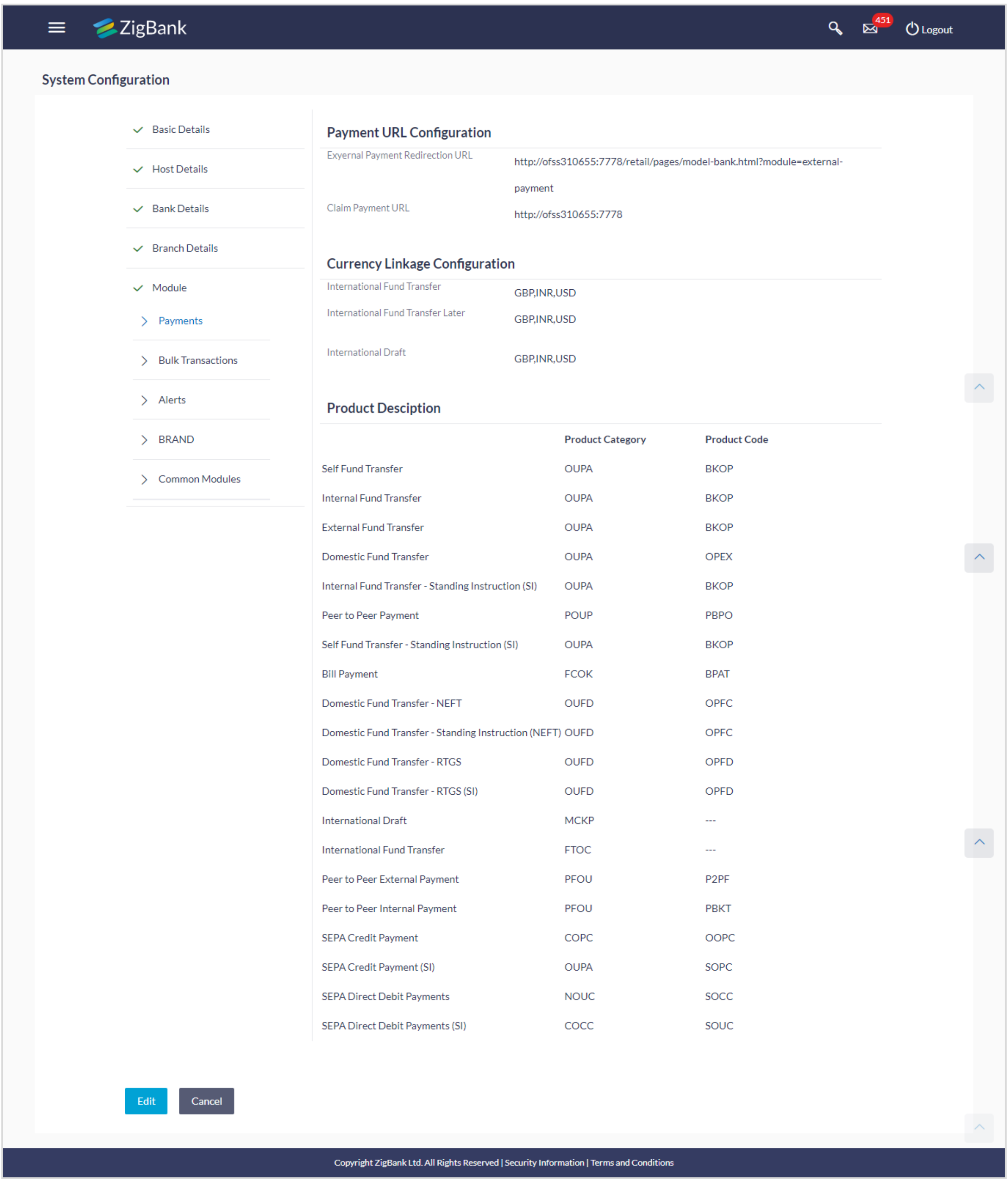
2.2.10 System Configuration - Module - Payments - View

Using this option, the system administrator maintains the payment module configurations. These details once defined can be viewed and edited using this transaction.

To view the payment details:

Click system configuration option on the dashboard and navigate to the payments details tab. The default option is 'View'

Module - Payments - View



Field Description

Field Name	Description
Payment URL Configuration	
External Payment Redirection URL	Displays the URL for external payments as defined.
Claim Payment URL	Displays the link as defined to claim money transferred by the initiator.
Currency Linkage Configuration	
International Fund Transfer	Displays the currency defined for international fund transfer now.
International Fund Transfer Later	Displays the currency to be used for international fund transfer on later date.
International Draft	Displays the currency defined for international draft.
Product Description	Displays the product description for each type of payment.
Product Category	Displays the product category defined for each payment transaction.
Product Code	Displays the product code defined for each payment transaction.

- Click **Edit** to edit the Payment Details. The **System Configuration – Module - Payments** screen appears in editable form.

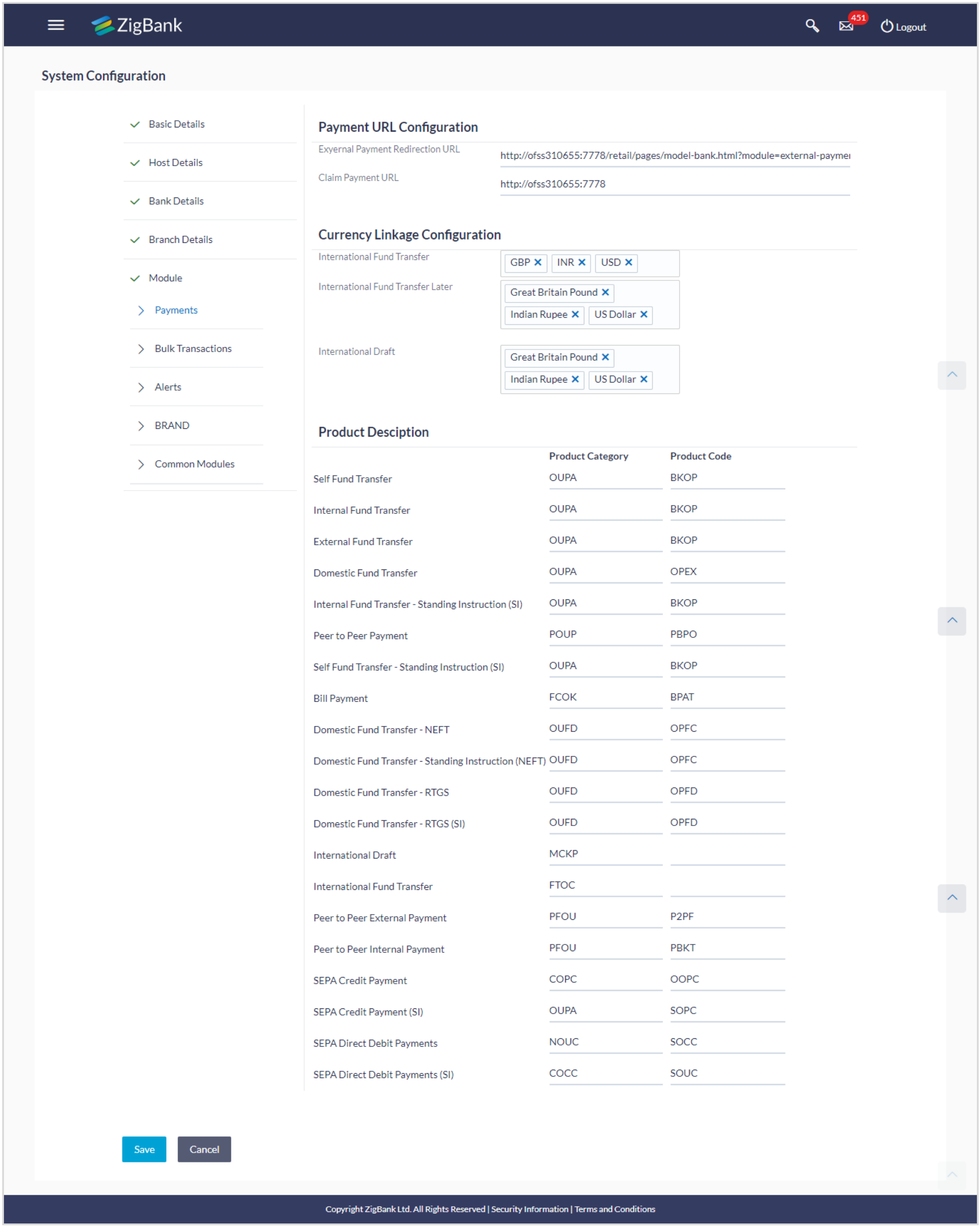
2.2.11 System Configuration - Module - Payments - Edit

Using this option, system administrator can edit the payment module details.

To edit the Payment module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration - Module – Payments** screen appears.
- In the **System Configuration - Module- Payments** screen, click **Edit**. The **System Configuration – Module - Payments** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Module - Payments - Edit



Field Description

Field Name	Description
Payment URL Configuration	

Field Name	Description
External Payment Redirection URL	Displays the URL for external payments as defined and available for edit.
Claim Payment URL	Displays the link as defined to claim money transferred by the initiator and available for edit.
Currency Linkage Configuration	
International Fund Transfer	Displays the currency defined for international fund transfer now and available for edit.
International Fund Transfer Later	Displays the currency to be used for international fund transfer on later date and available for edit.
International Draft	Displays the currency defined for international draft and available for edit.
Product Description	Displays the product description for each type of payment.
Product Category	Displays the product category defined for each payment transaction and available for edit.
Product Code	Displays the product code defined for each payment transaction and available for edit.

- In the **External Payment Redirection URL** field, edit the URL if required.
- In the **Claim Payment URL** field, edit the URL to claim the payments, if required.
- In the **Currency Linkage Configuration** section, edit/ delete the currencies required.
- In the **Product Description** section, edit the Product Category and Product Code, if required for Internal Fund Transfer, International Fund Transfer and International Draft.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Module - Payments - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Host Details, Bank Details, Branch Details or Module tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

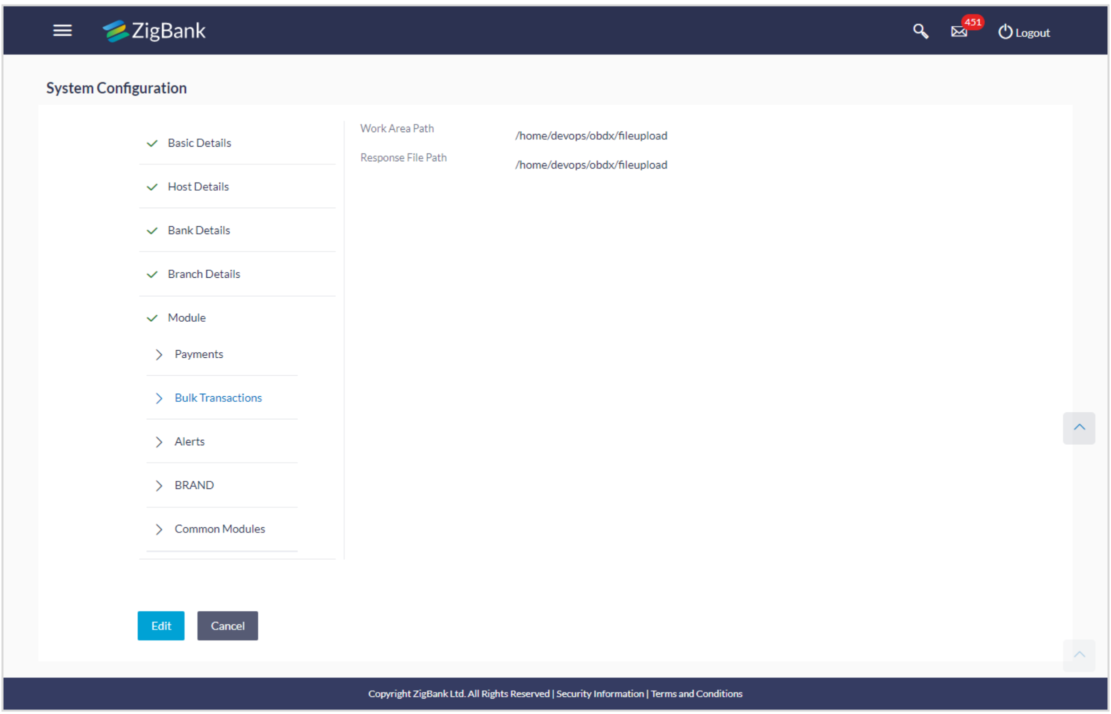
2.2.12 System Configuration - Module - Bulk Transactions - View

As part of bulk transactions option, the work area path and response file path of bulk transactions are defined.

To view the Bulk Transactions module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Bulk Transactions** tab. The **System Configuration - Module - Bulk Transactions** screen appears.

Module - Bulk Transactions - View



Field Description

Field Name	Description
Work Area Path	Displays the work area path for bulk transactions.
Response File Path	Displays the response file path for bulk transactions.

- Click **Edit** to edit the Bulk Transactions details. The **System Configuration - Bulk Transactions** screen appears in editable form.

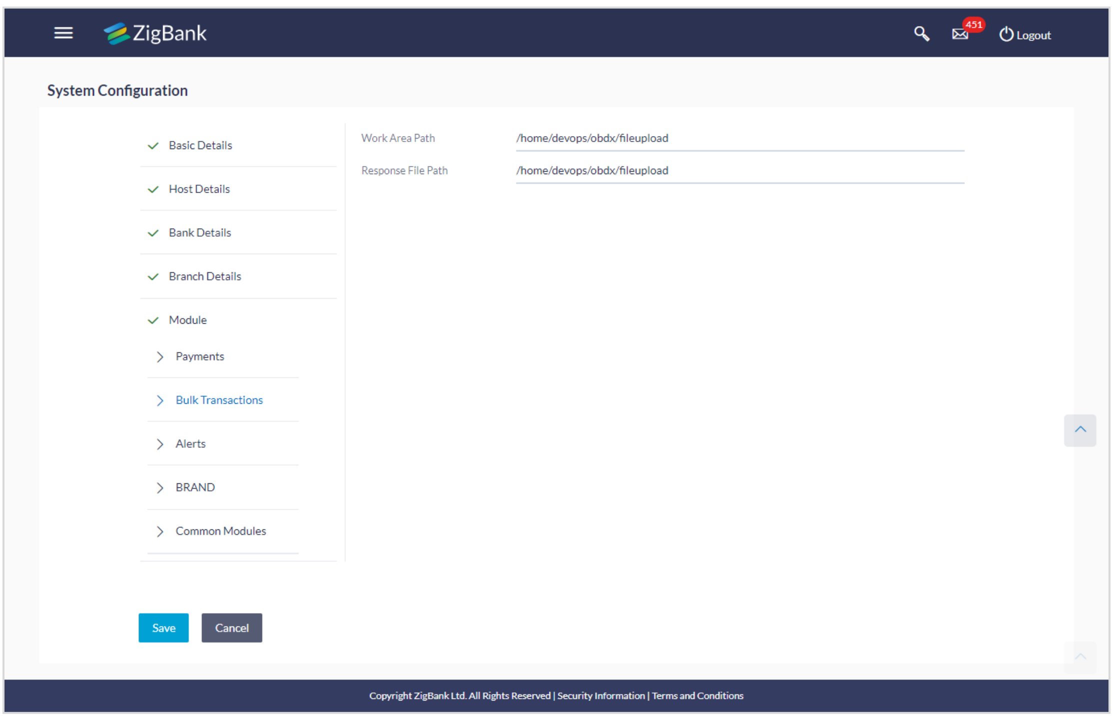
2.2.13 System Configuration - Module - Bulk Transactions - Edit

Using this option, system administrator can edit the Bulk Transactions module details.

To edit the Bulk Transactions module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Bulk Transactions** tab. The **System Configuration - Module - Bulk Transactions** screen appears.
- In the **System Configuration - Module- Bulk Transactions** screen, click **Edit**. The **System Configuration - Module- Bulk Transactions** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Module - Bulk Transactions - Edit



Field Description

Field Name	Description
Work Area Path	Displays the work area path defined for bulk transactions and is available for edit.
Response File Path	Displays the response file path defined for bulk transactions and is available for edit.

- In the **Work Area Path** field, edit the path of the working area, if required.
- In the **Response File Path** field, edit the path of the response file, if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Module - Bulk Transactions - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

2.2.14 System Configuration - Module - Alerts - View

Alerts are generated by the system to notify users about a particular transaction.

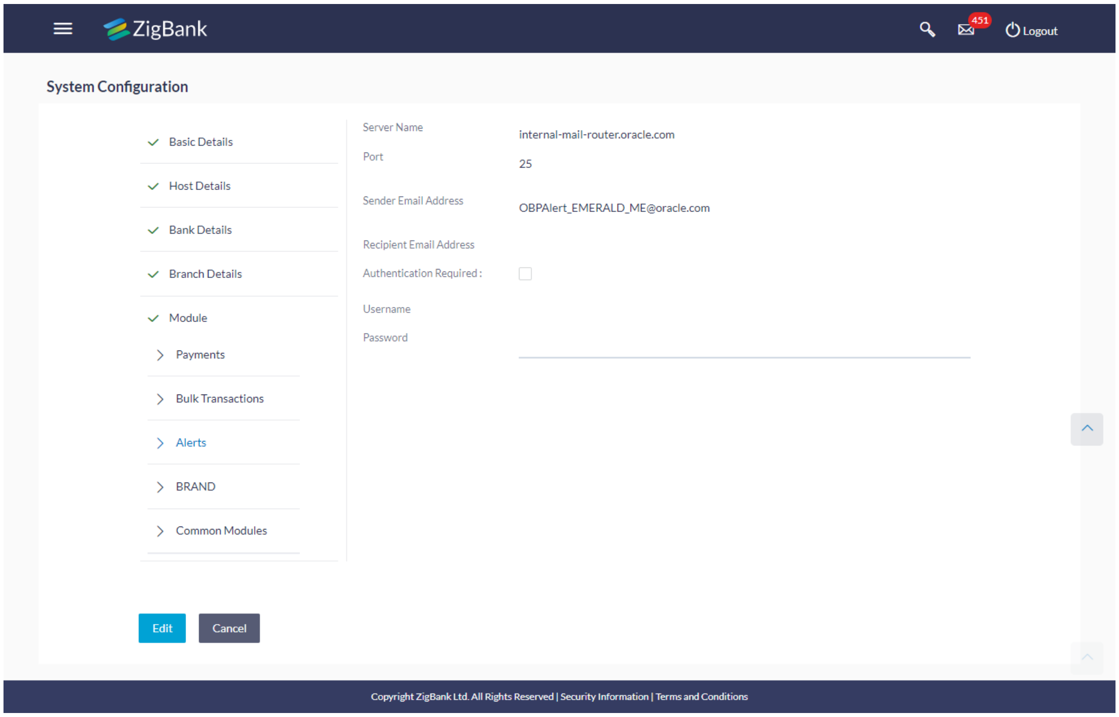
The system administrator defines the server name and port number from which alerts is sent to the user during setting up of System Configuration.

The other details like sender email address, receiver email address, whether authentication of the alerts is required, user name and password of the user are also configured during system configuration set up.

To view the Alerts module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Alerts** tab. The **System Configuration - Module – Alerts** screen appears.

Module - Alerts - View



Field Description

Field Name	Description
Server Name	Displays the name of the server as specified.
Port	Displays the port ID of the server.
Sender Email Address	Displays the email address of the sender of the alerts.
Recipient Email Address	Displays the email address of recipient of the alerts.
Authentication Required	Displays the check box selected/unselected if authentication is required.
User Name	Displays the user name of the user who receives alert.
Password	Displays the password corresponding to the user name.

- Click **Edit** to edit the Alerts detail. The **System Configuration – Module - Alerts** screen appears in editable form.

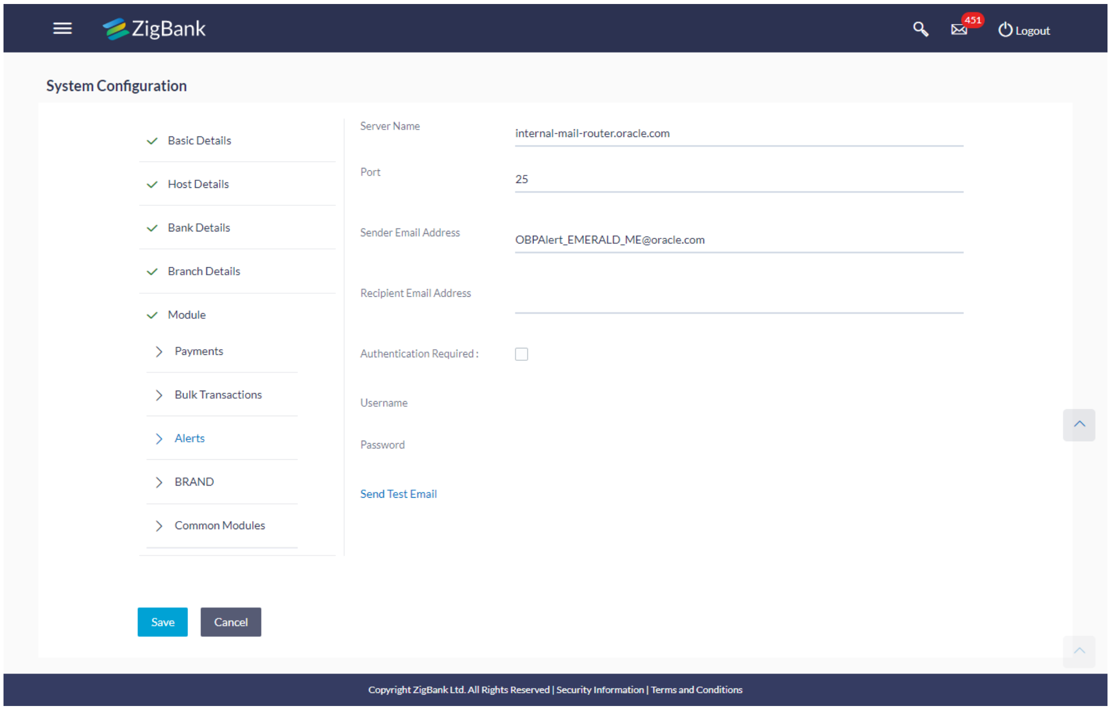
2.2.15 System Configuration - Module - Alerts - Edit

Using this option, system administrator can edit the Alerts module details.

To edit the Alerts module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Alerts** tab. The **System Configuration - Module – Alerts** screen appears.
- In the **System Configuration - Module- Alerts** screen, click **Edit**. The **System Configuration - Module- Alerts** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Module - Alerts - Edit



Field Description

Field Name	Description
Server Name	Displays the name of the server and is available for edit.
Port	Displays the port ID and is available for edit.
Sender Email Address	Displays the email address of the sender of the alerts and is available for edit.
Recipient Email Address	Displays the email address of recipient of the alerts and is available for edit.
Authentication Required	Select the check box, if authentication is required/not required.
User Name	Displays the user name of the user who receives alert and is available for edit.
Password	Displays the password corresponding to the user name.
Send Test Email	Click to receive the test email on the specified email ID.

- In the **Server Name** field, edit the name of the server, if required.
- In the **Port** field, edit the port id, if required.
- In the **Sender Email Address** field, edit the email address of the sender, if required.

- In the **User Name** and **Password** field, enter the user name and password.
- Select the check box, if authentication is required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Module - Alerts - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

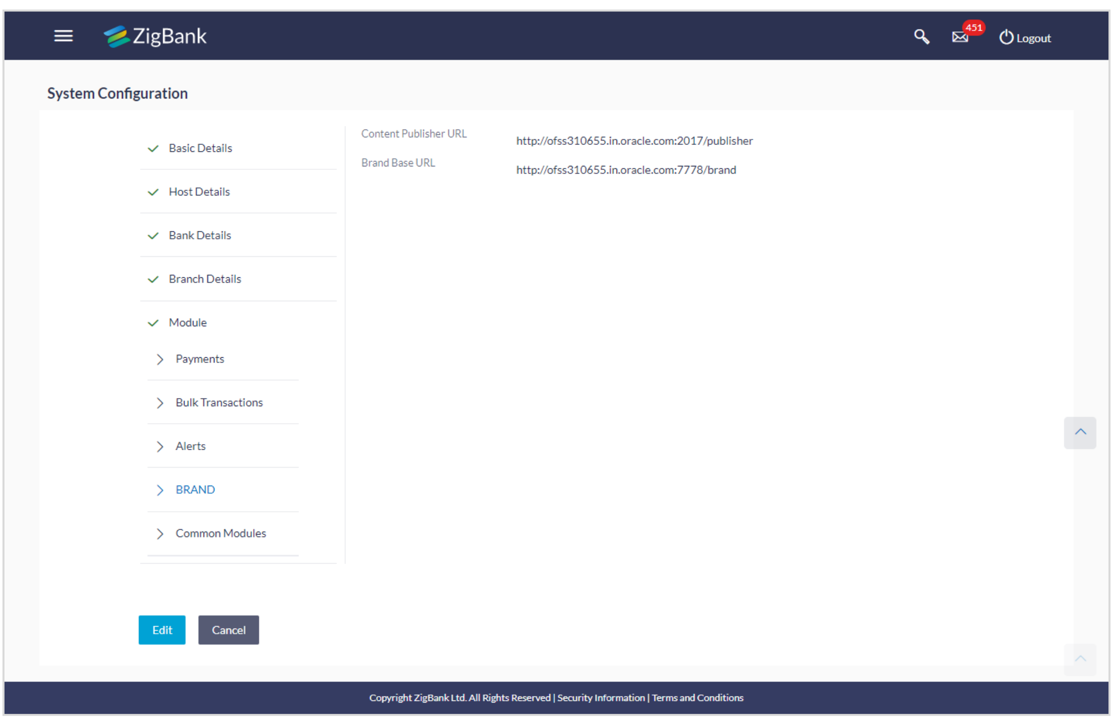
2.2.16 System Configuration - Module - BRAND - View

Using this option, the system administrator maintains the BRAND module configurations. These configurations once defined can be viewed and edited.

To view the BRAND module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **BRAND** tab. The **System Configuration - Module – BRAND** screen appears.

Module - BRAND - View



Field Description

Field Name	Description
Content Publisher URL	Displays the URL as defined for publishing the contents.
Brand Base URL	Displays the URL as defined for brand base

- Click **Edit** to edit the brand details. The **System Configuration - BRAND** screen appears in editable form.

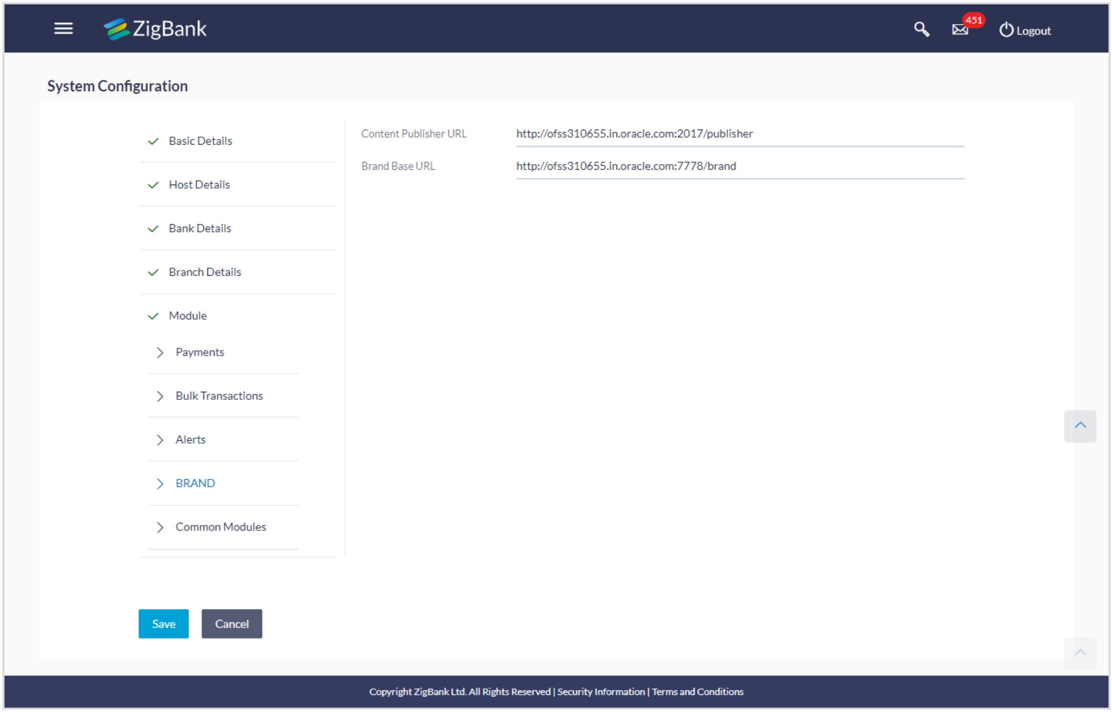
2.2.17 System Configuration - Module - BRAND - Edit

Using this option, system administrator can edit the BRAND module details.

To edit the BRAND module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **BRAND** tab. The **System Configuration - Module – BRAND** screen appears.
- In the **System Configuration - Module- BRAND** screen, click **Edit**. The **System Configuration - Module- BRAND** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Module - BRAND - Edit



Field Description

Field Name	Description
Content Publisher URL	Displays the URL as defined for publishing the contents and is available for edit.
Brand Base URL	Displays the URL as defined for brand base and is available for edit

- In the **Content Publisher URL** field, edit the content publisher URL, if required.
- In the **Brand Base URL** field, edit the brand base URL, if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Module - BRAND - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

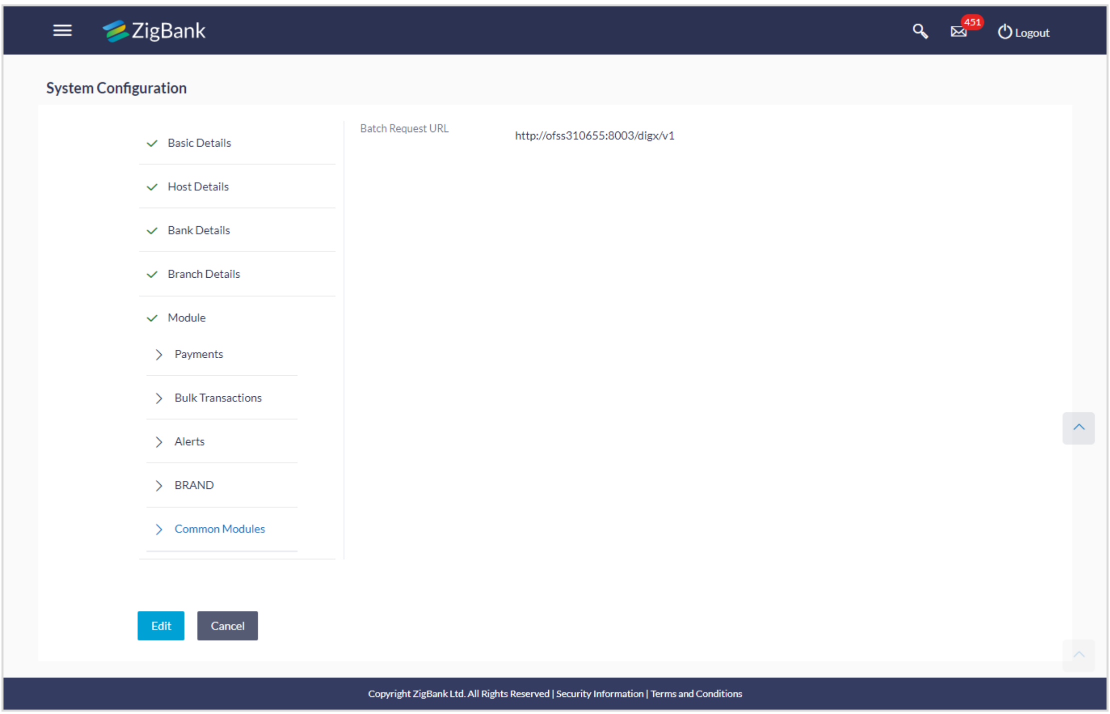
2.2.18 System Configuration - Module – Common Modules - View

Using this option, the system administrator maintains the common modules. These configurations once defined can be viewed and edited.

To view the common module details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Common Modules** tab. The **System Configuration - Module – Common Modules** screen appears.

Module - Common Modules - View



Field Description

Field Name	Description
Batch Request URL	Displays the URL for the batch request.

- Click **Edit** to edit the Common Module Details. The **System Configuration - Common Modules** screen appears in editable form.

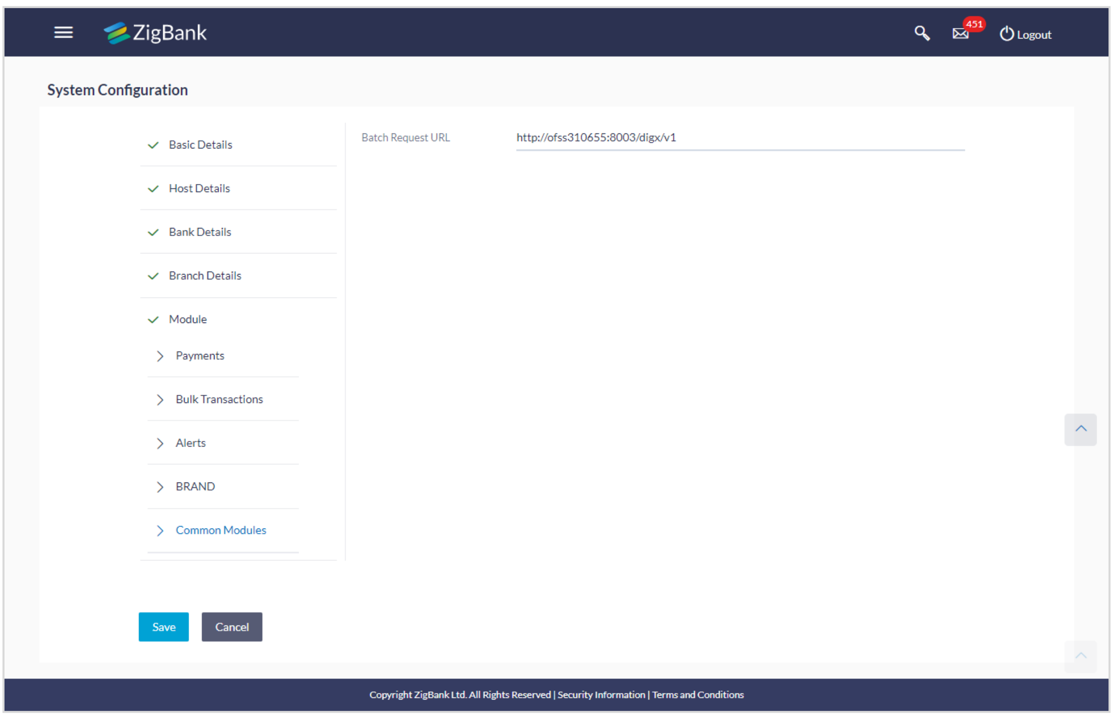
2.2.19 System Configuration - Module - Common Modules - Edit

Using this option, system administrator can edit the common module details.

To edit the common modules details:

- In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.
- Click the **Common Module** tab. The **System Configuration - Module – Common Modules** screen appears.
- In the **System Configuration - Module- Common Module** screen, click **Edit**. The **System Configuration – Module - Common Modules** screen appears in editable form.
  OR
  Click **Cancel** to cancel the transaction.

Module - Common Modules - Edit



Field Description

Field Name	Description
Batch Request URL	Displays the url for the batch request and is available for edit

- In the **Batch Request URL** field, edit the web address if required.
- Click **Save**.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

- The **System Configuration – Common Modules** - **Review** screen appears. Verify the details and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

2.3 Set-up System Configuration – OBP Base and US LZN

Once the OBDX installation is complete, the system administrator will login into the system and he/she will have a configuration wizard to define the details required for setup.

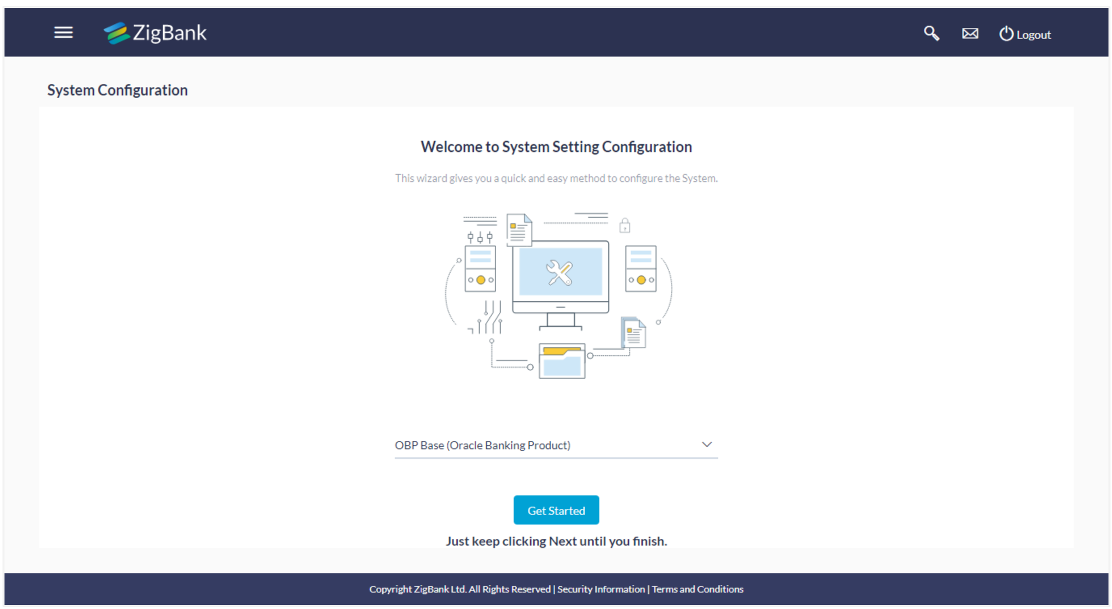
System configuration is a onetime setup and once defined, the administrator can view/edit the details.

To set-up the system configuration:

- The Administrator logins in to the application using valid login credentials.

The System Configuration **screen with welcome note is displayed**

System Configuration

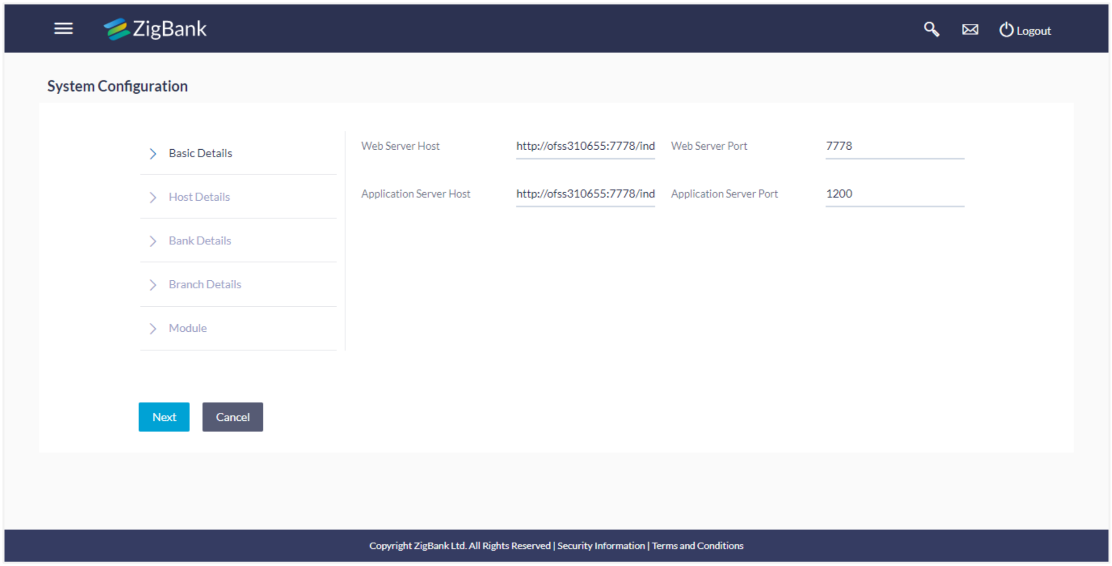


Field Description

Field Name	Description
Select Host	You need to select the host system for the channel banking platform.

- Select the host from the list to get started with system configuration set up.
- Click Get Started. The System Configuration – Basic Details screen is displayed.

2.3.1 System Configuration – Basic Details

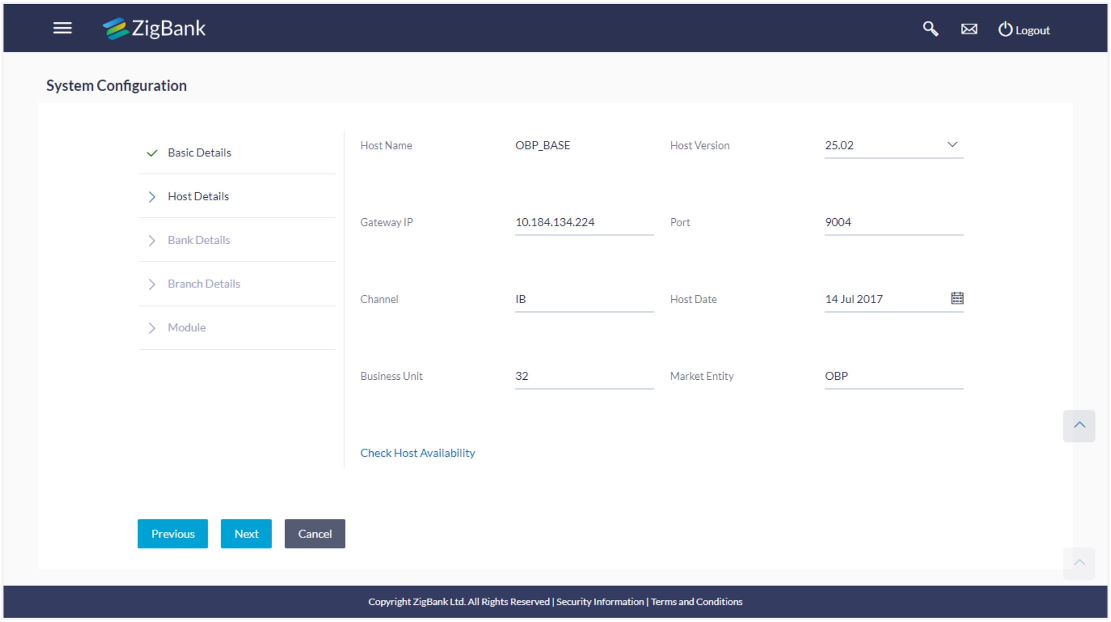


Field Description

Field Name	Description
Web Server Host	Specify the web-server host.
Web Server Port	Enter the web server port number.
Application Server Host	Enter the address of the application server host.
Application Server Port	Enter the application server port number

- In the **Web Server Host** field, enter the host name of the web server.
- In the **Web Server Port** field, enter the port number of the web server.
- In the **Application Server Host** field, enter the address of the application server host.
- In the **Application Server Port** field, enter the port number of the application server port.
- Click **Next**. The **System Configuration – Host Details** screen appears.
  OR
  Click **Cancel** to cancel the setup process

2.3.2 System Configuration – Host Details



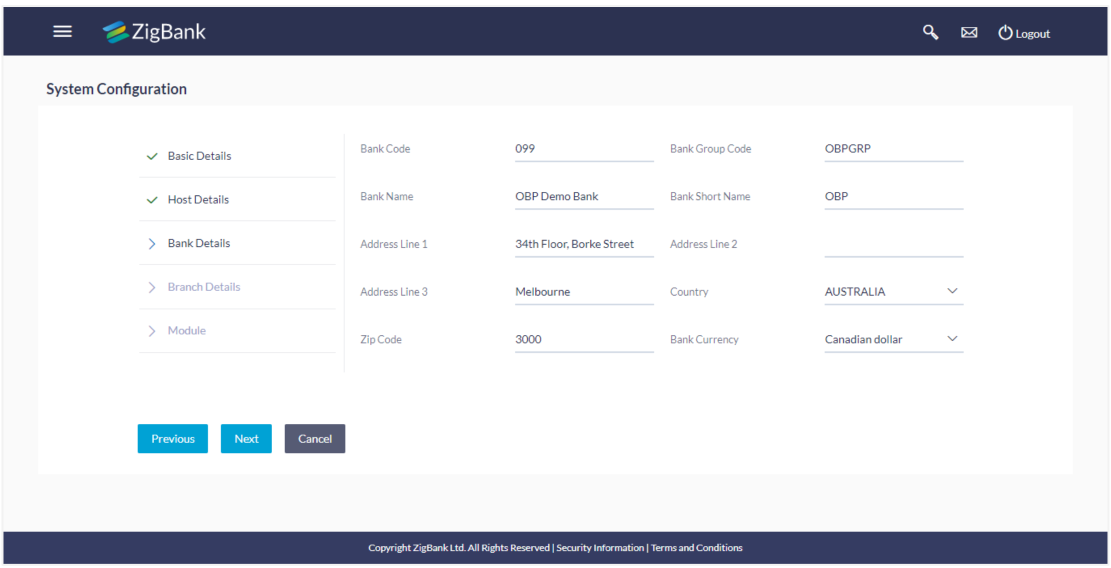
Field Description

Field Name	Description
Host Name	The host system as selected for the channel banking platform is displayed.
Host Version	Select the version number of the host system.
Gateway IP	Specify the Gateway IP of the selected host system.
Port	Specify the port for the host system.
Channel	Specify the channel to access the application.
Host Date	Specify the date of the host set up.
Business Unit	Specify the business unit name.
Market Entity	Specify the market entity.
Check Host Availability	Click to check if the Host is available.

- From the **Host Version** list, select the version of the host.
- In the **Gateway IP** field, enter the default gateway IP address of the server.
- In the **Port** field, enter the port id.
- In the **Channel** field, enter the channel to access the application.

- Select an appropriate host date by clicking on the date picker.
- In the **Business Unit** field, enter the name of the business unit.
- In the **Market Entity** field, enter the name of the market entity.
- Click the **Check Host Availability** link to check the host availability. The message of successful testing appears.
- Click **Next**. The **System Configuration – Bank Details** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.3.3 System Configuration – Bank Details

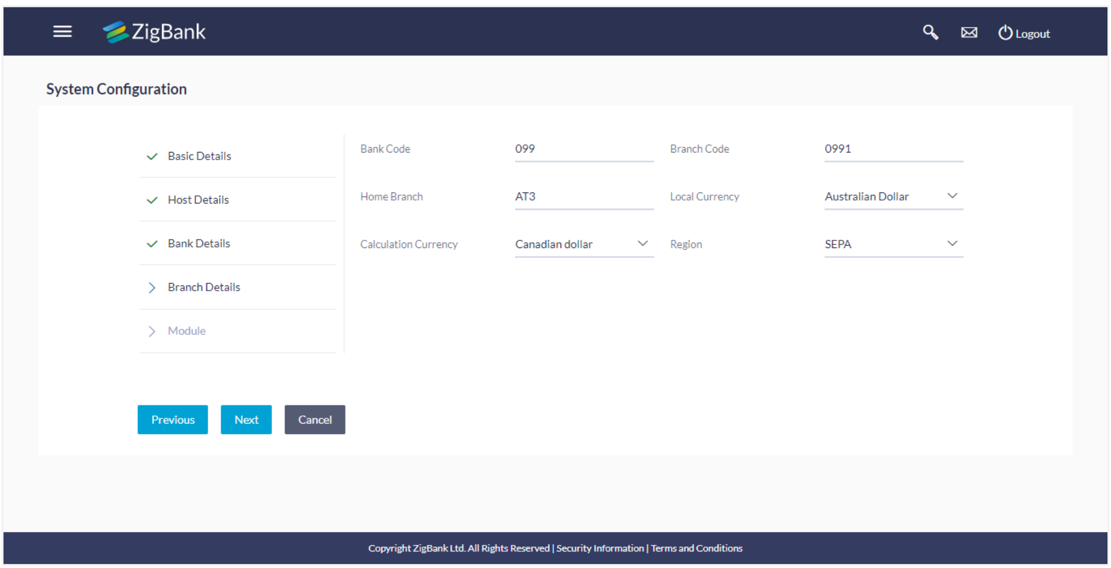


Field Description

Field Name	Description
Bank Code	Enter unique code to identify the bank.
Bank Group Code	Enter the Bank Group Code.
Bank Name	Enter the name of the bank.
Bank Short Name	Enter the short name of the bank.
Address - Line 1 - 3	Enter the address details of the bank.
Country	Enter the country in which the bank is located/headquartered.
ZIP Code	Enter the zip code of the bank.
Bank Currency	Specify the default currency applicable for the bank.

- In the **Bank Code** field, enter the code of the bank.
- In the **Bank Group Code** field, enter the group code of the bank.
- In the **Bank Name** field, enter the name of the bank.
- In the **Bank Short Name** field, enter the short name of the bank.
- In the **Address Line 1-3** field, enter the address of the bank.
- From the **Country** list, select the country of the bank where it is located.
- In the **ZIP Code** field, enter the city/ zip code of the bank where it is located.
- From the **Bank Currency** list, select the appropriate currency.
- Click **Next**. The **System Configuration – Branch Details** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.3.4 System Configuration – Branch Details

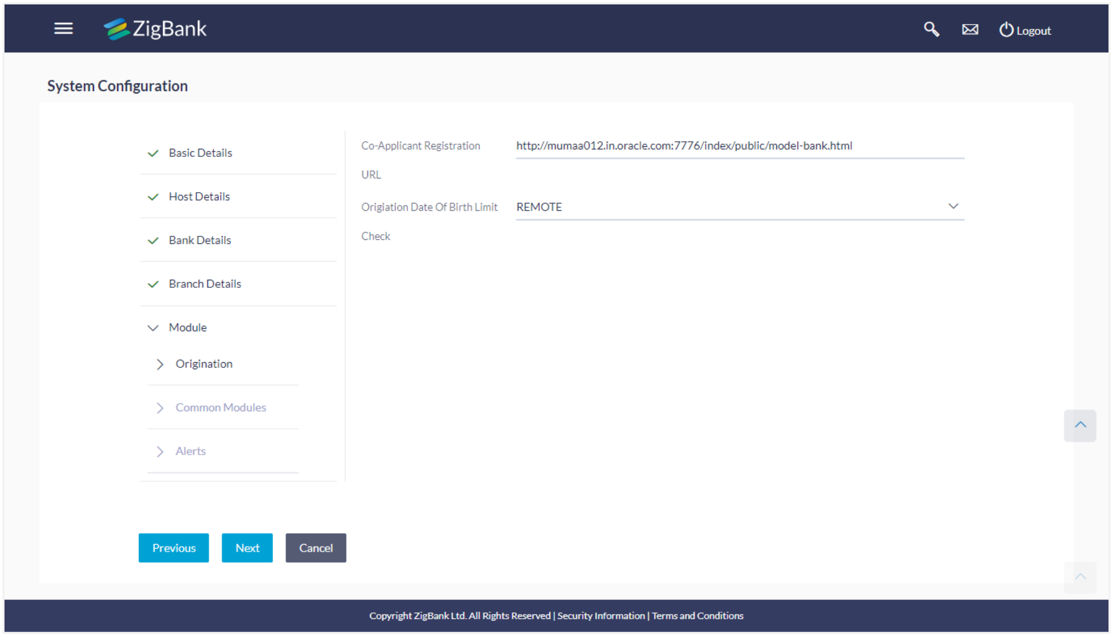


Field Name	Description
Bank Code	Enter the unique code to identify the bank. You should specify the same bank code as specified in the previous section
Branch Code	Enter the bank branch code.
Home Branch	Specify the home branch for the bank.
Local Currency	Select the local currency applicable for the bank.
Calculation Currency	Select the calculation currency applicable for the bank.

Field Name	Description
Region	Select the region of payment. The options are: • India • UK • SEPA

- In the **Bank Code** field, enter the code of the bank.
- In the **Branch Code** field, enter the code of the bank branch.
- In the **Home Branch** field, enter the code home branch of the bank.
- From the **Local Currency** list, select the local currency of the bank.
- From the **Calculation Currency** list, select the calculation currency of the bank.
- From the **Region** list, select the appropriate region.
- Click **Next**. The **System Configuration – Module - Originations** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.3.5 System Configuration – Module - Originations

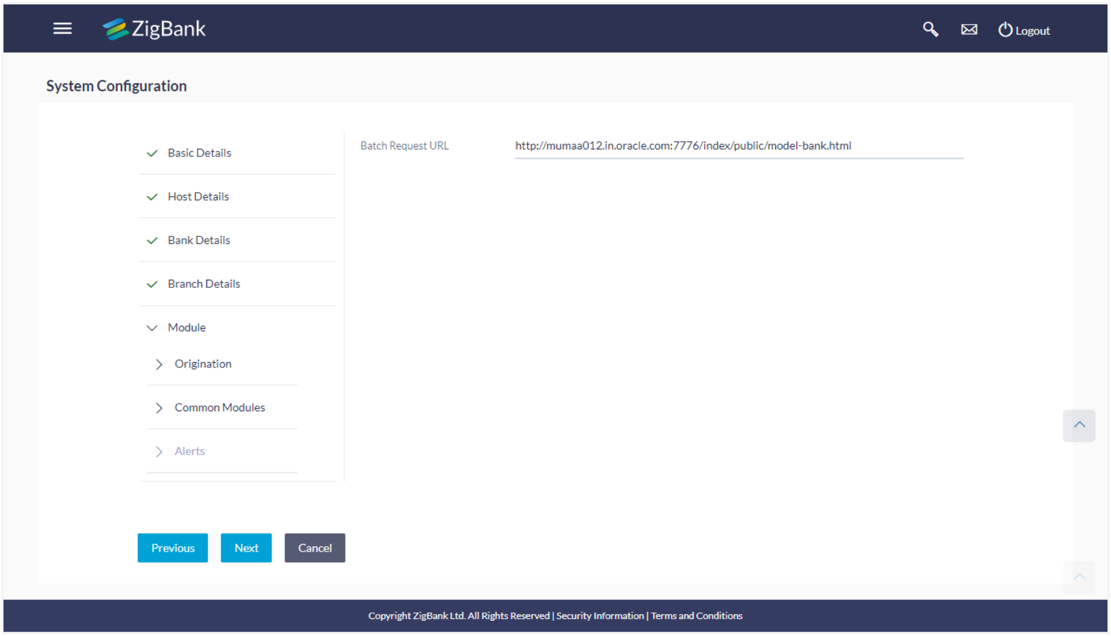


Field Description

Field Name	Description
Co- Applicant Registration URL	Specify the URL for the registration of the co-applicant.
Origination Date of Birth Limit Check	Select the option i.e. Local / Remote for validating the date of birth limit.

- In the **Co- Applicant Registration URL** field, enter the URL that will be used for co-applicant registration.
- Select an appropriate option i.e. local/remote for **Date of Birth Limit Check**
- Click **Next**. The **System Configuration – Module – Common Modules** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.3.6 System Configuration – Module – Common Modules

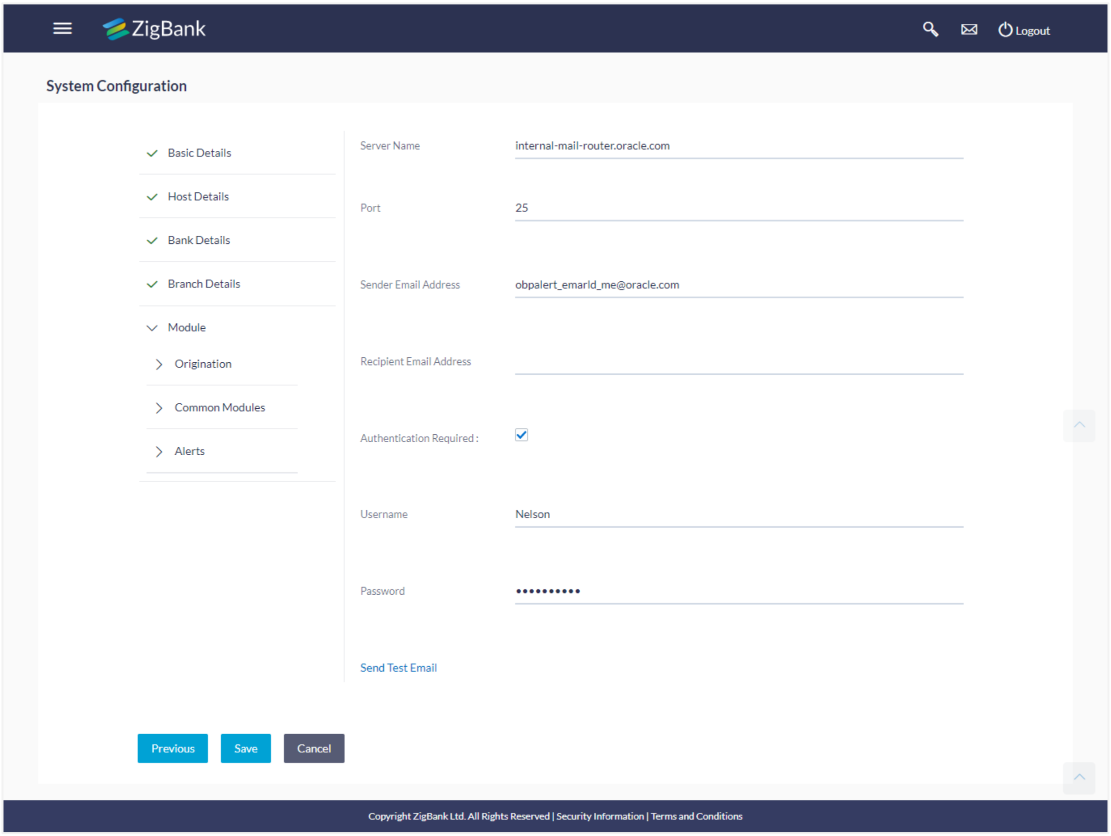


Field Description

Field Name	Description
Batch Request URL	Specify the URL for batch request processing.

- Enter the batch request URL.
- Click **Next**. The **System Configuration – Module – Alerts** screen appears.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.

2.3.7 System Configuration – Module – Alerts



Field Description

Field Name	Description
Server Name	Enter the name of the server.
Port	Enter the port number
Sender Email Address	Specify the email address from which alerts will be sent to the recipients.
Recipient Email Address	Specify the email address of recipient for testing purpose.
Authentication Required	Select the check box, if authentication is required.
User Name	Specify the user name of the user if mapped to the sender email address. It could be the same as sender email address.
Password	Enter the password corresponding to the user name.

Field Name	Description
Send Test Email	Click to trigger and test the alert configuration by sending test email to the defined recipient email address.

- In the **Server Name** field, enter the name of the mail server.
- In the **Port** field, enter the port id.
- In the **Sender Email Address** field, enter the email address of the sender which needs to appear when emails are sent to the recipient.
- In the **User Name** and **Password** field, enter the user name and password.
- Select the **Send Test Email** check box, to send a test email.
- Click **Save**.
  OR
  Click **Previous** to go to the previous screen.
  OR
  Click **Cancel** to cancel the setup process.
- The **System Configuration – Review** screen appears. Verify the details and click **Confirm**.
  OR
  Click **Cancel** to cancel the setup process.
- The success message of saving the system configuration appears along with the status

2.4 System Configuration – OBP Base and US LZN – View and Edit

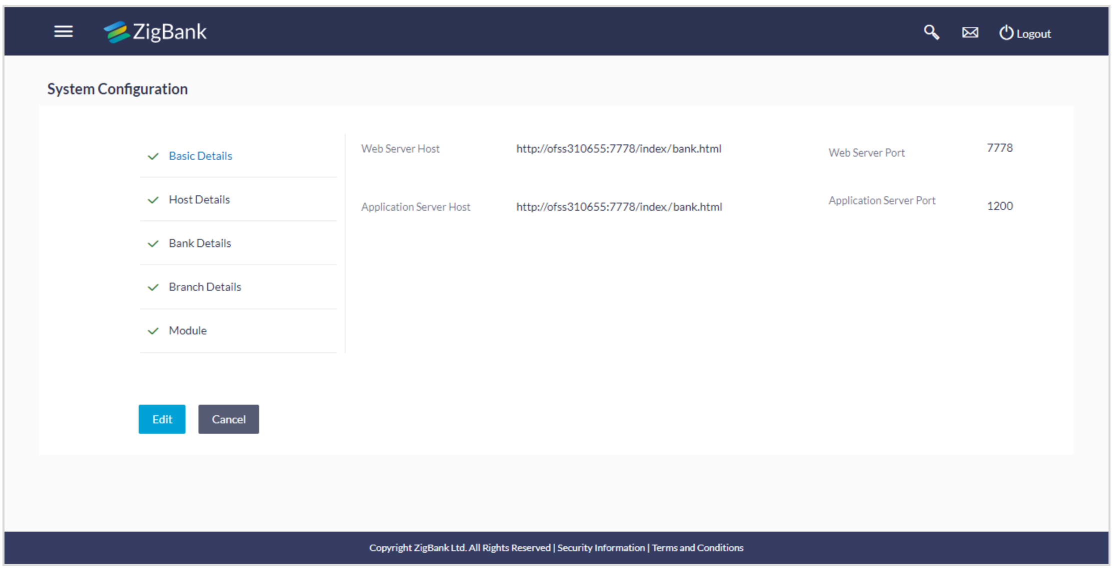
2.4.1 System Configuration - Basic Details - View

Using this option the system administrator can view and edit the system configuration details that have already been created.

To view the basic details of the system:

- Click on **System Configuration** option on the dashboard and navigate to the basic details. The default option is **'View'**.

Basic Details - View



Field Description

Field Name	Description
Web Server Host	Displays the web server host details.
Web Server Port	Displays the port of the web server.
Application Server Host	Displays the application server host details.
Application Server Port	Displays the port of the application server.

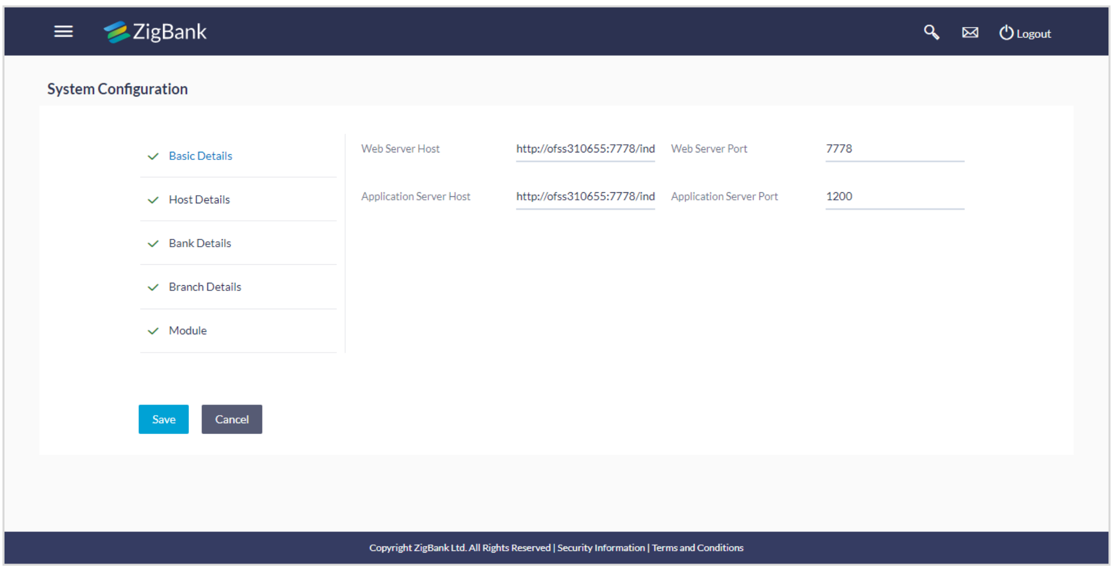
- Click **Edit** to edit the Basic Details. The **System Configuration - Basic Details** screen appears in editable form.

2.4.2 System Configuration - Basic Details - Edit

Using this option, system administrator can edit the basic details.

To edit the basic details:

In the **System Configuration -** Basic **Details** screen, click **Edit**. The **System Configuration -** Basic **Details** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction



Field Description

Field Name	Description
Web Server Host	Displays the web server host details and available for edit.
Web Server Port	Displays the port of the web server and available for edit.
Application Server Host	Displays the application server host details and available for edit.
Application Server Port	Displays the port of the application server and available for edit.

- In the **Web Server** Host field, edit the host name of the web server if required.
- In the **Web Server Port** field, edit the port number of the web server if required.
- In the **Application Server Host** field, edit the host name of the application server host if required.
- In the **Application Server Port** field, edit the port number of the application server port if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.

- The **System Configuration - Basic Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Bank Details, Branch Details or Module tabs to view and edit the respective details if required.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

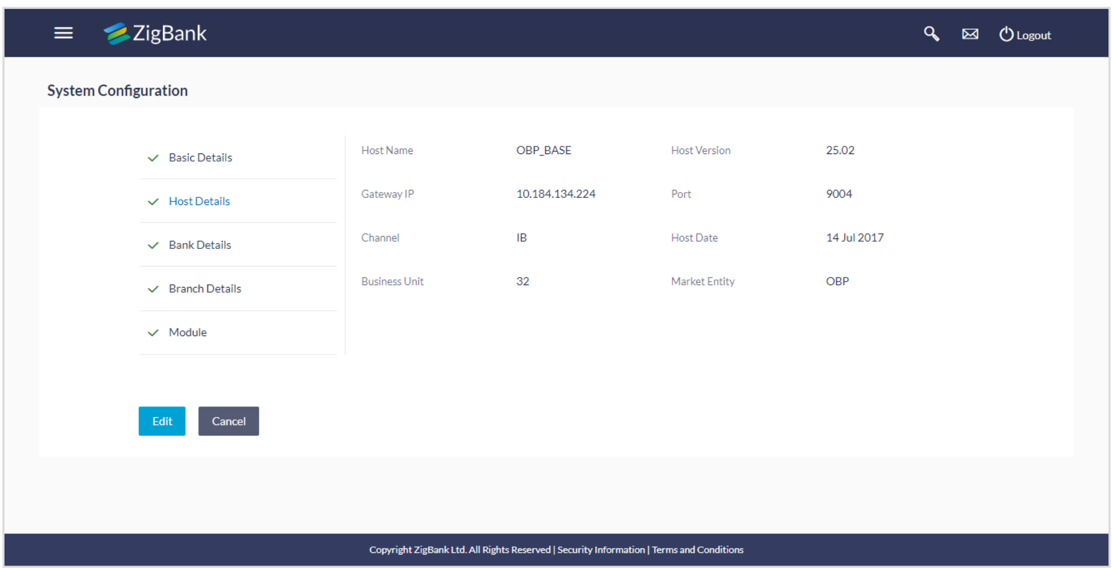
2.4.3 System Configuration - Host Details - View

Using this option System Administrator maintains the host configuration. These details once defined can be viewed and edited using this transaction.

To view the host details:

- Click on **System Configuration** option on the dashboard and navigate to the host details tab. The default option is **'View'**.

Host Details - View



Field Description

Field Name	Description
Host Name	Displays the host name of the channel banking platform.
Host Version	Displays the host version of the channel platform.
Gateway IP	Displays the Gateway IP of the selected host system.
Port	Displays the port of the host system.

Field Name	Description
Channel	Displays the channel to access the application.
Host Date	Displays the date of the host set up.
Business Unit	Displays the Business Unit name as defined during setup
Market Entity	Displays the Market Entity as defined during setup

- Click **Edit** to edit the Host Details. The **System Configuration - Host Details** screen appears in editable form.

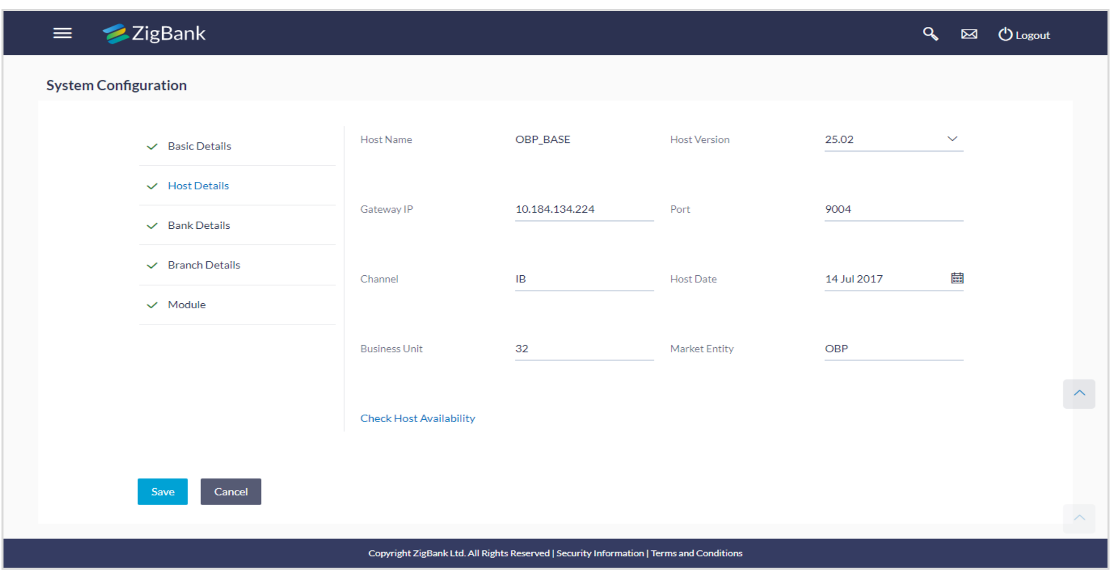
2.4.4 System Configuration - Host Details - Edit

Using this option, system administrator can edit the host details.

To edit the host details:

In the **System Configuration - Host Details** screen, click **Edit**. The **System Configuration - Host Details** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction.

Host Details - Edit



Field Description

Field Name	Description
Host Name	Displays the host name of the channel banking platform.
Host Version	Displays the host version of the channel platform and available for edit.
Gateway IP	Displays the Gateway IP of the selected host system and available for edit.
Port	Displays the port of the host system and available for edit.
Channel	Displays the channel to access the application.
Host Date	Displays the date of the host set up and available foe edit.
Business Unit	Displays the business unit name as defined and available for edit.
Market Entity	Displays the market entity name as defined and available for edit.
Check Host Availability	Click on the link to check if the Host is available.

- From the **Host Version** list, select the version of the host, if required.
- In the **Gateway IP** field, edit the IP address of the gateway.
- In the **Port** field, edit the port id.
- In the **Channel** field, edit the channel to access the application.
- From the **Host Date** list, select the appropriate date.
- In the **Business Unit** field, enter the name of the business unit.
- In the **Market Entity** field, enter the name of the market entity.
- Click the **Check Host Availability** link to check the host availability. The message of successful testing appears.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Host Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Bank Details, Branch Details or Module tabs to view and edit the respective details.
- The screen with success message appears of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

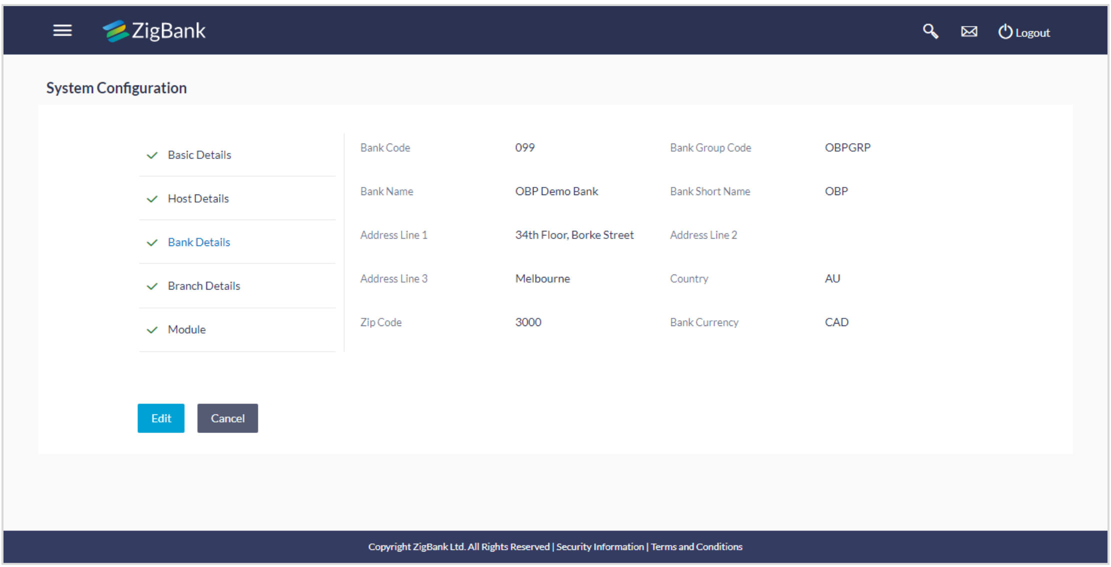
2.4.5 System Configuration - Bank Details -View

Using this option System Administrator maintains the bank details. These details once defined can be viewed and edited using this transaction.

To view the bank details:

Click on System Configuration option on the dashboard and navigate to the bank details tab. The default option is 'View'

Bank Details - View



Field Description

Field Name	Description
Bank Code	Displays the bank code as defined
Bank Group Code	Displays the bank group code as defined.
Bank Name	Displays the name of the bank as defined.
Bank Short Name	Displays the short name of the bank as defined.
Address Line 1 - 3	Displays the address of the bank as defined.
Country	Displays the country of the bank.
ZIP Code	Displays the ZIP code of the bank.
Bank Currency	Displays the applicable bank currency.

- Click **Edit** to modify the Bank Details. The **System Configuration - Bank Details** screen appears in editable form.

2.4.6 System Configuration - Bank Details - Edit

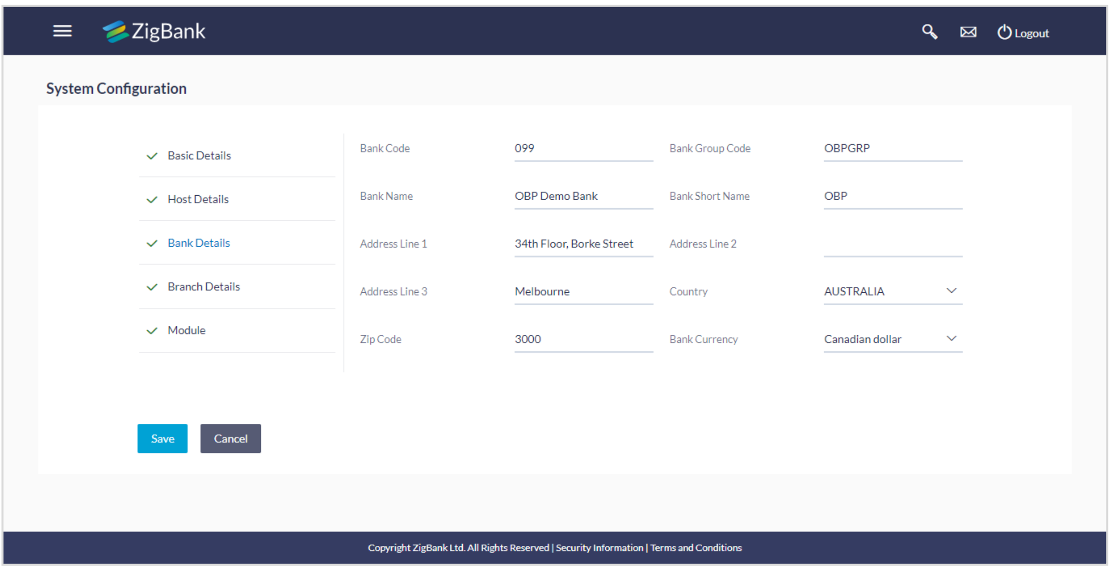
Using this option, system administrator can edit the bank details.

To edit the bank details:

In the **System Configuration** screen, click **Bank Details** tab. The **System Configuration - Bank Details** screen appears.

In the **System Configuration - Bank Details** screen, click **Edit**. The **System Configuration - Bank Details** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction.

Bank Details - Edit



Field Description

Field Name	Description
Bank Code	Displays the bank code as defined and available for edit
Bank Group Code	Displays the bank group code as defined and available for edit.
Bank Name	Displays the name of the bank as defined and available for edit.
Bank Short Name	Displays the short name of the bank as defined and available for edit.
Address Line 1 - 3	Displays the address of the bank as defined and available for edit.
Country	Displays the country of the bank and available for edit.
ZIP Code	Displays the ZIP code of the bank and available for edit.
Bank Currency	Default currency applicable for the bank.

- In the **Bank Code** field, edit the code of the bank.
- In the **Bank Group Code** field, edit the group code of the bank.
- In the **Bank Name** field, edit the name of the bank.
- In the **Bank Short Name** field, edit the short name of the bank.
- In the **Address Line 1-3** field, edit the address of the bank.
- From the **Country** list, select the country of the bank.
- In the **ZIP Code** field, edit the city/ zip code of the bank if required.
- From the **Bank Currency** list, select the appropriate currency.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Bank Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details.
- The screen with success message appears of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

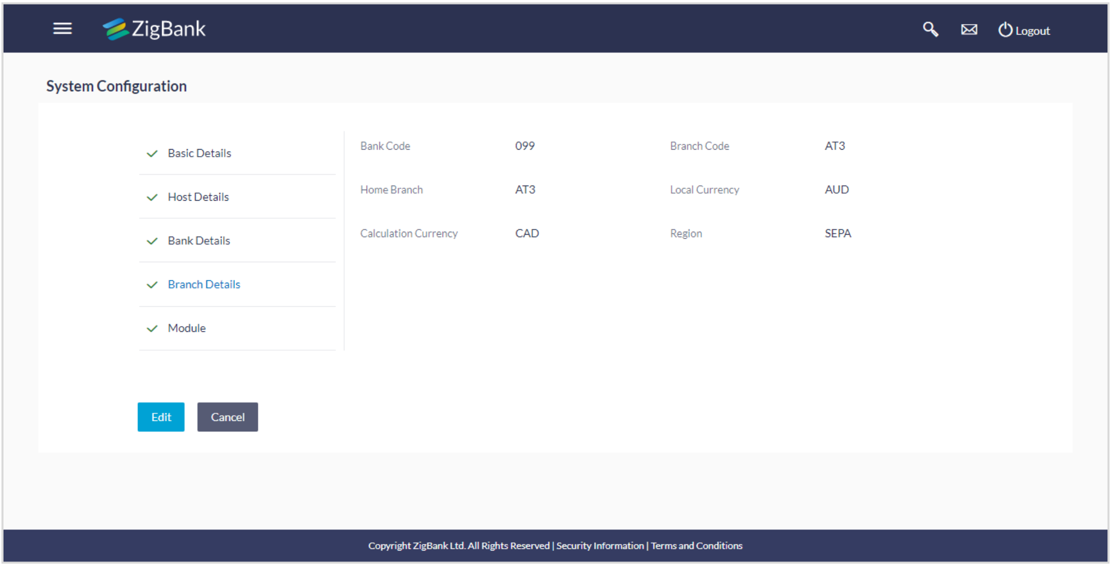
2.4.7 System Configuration - Branch Details - View

Using this option System Administrator maintains the branch details. These details once defined can be viewed and edited using this transaction.

To view the branch details:

Click System Configuration option on the dashboard and navigate to the branch details tab. The default option is ‘View’.

Branch Details - View



Field Description

Field Name	Description
Bank Code	Displays the unique code of the bank as defined.
Branch Code	Displays the bank branch code as defined.
Home Branch	Displays the home branch code as defined.
Local Currency	Displays the local currency as defined.
Calculation Currency	Displays the calculation currency as defined.
Region	Displays the region of bank payments as defined. The options are: • India • UK • SEPA

- Click **Edit** to edit the branch Details. The **System Configuration - Branch Details** screen appears in editable form.

2.4.8 System Configuration - Branch Details - Edit

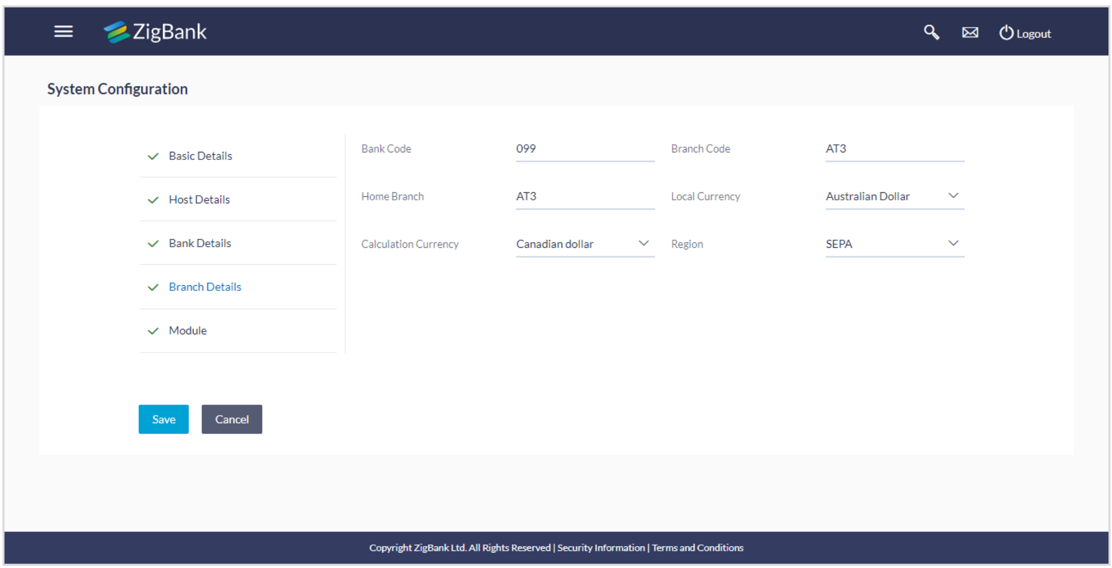
Using this option, system administrator can edit the branch details.

To edit the branch details:

In the **System Configuration** screen, click **Branch Details** tab. The **System Configuration - Branch Details** screen appears.

In the **System Configuration - Branch Details** screen, click **Edit**. The **System Configuration - Branch Details** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction

Branch Details - Edit



Field Description

Field Name	Description
Bank Code	Displays the unique code of the bank as defined.
Branch Code	Displays the bank branch code as defined and available for edit.
Home Branch	Displays the home branch code as defined and available for edit.
Local Currency	Displays the local currency as defined and available for edit.
Calculation Currency	Displays the calculation currency as defined and available for edit.

Field Name	Description
Region	Displays the region of bank payments as defined and available for edit. The options are: • India • UK • SEPA

- In the **Branch Code** field, edit the branch code of the bank.
- In the **Home Branch** field, edit the name of the home branch of the bank.
- From the **Local Currency** list, select the local currency of the bank branch.
- From the **Calculation Currency** list, select the calculation currency of the bank branch.
- From the **Region** list, select the appropriate region for payments.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Branch Details - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details.
- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

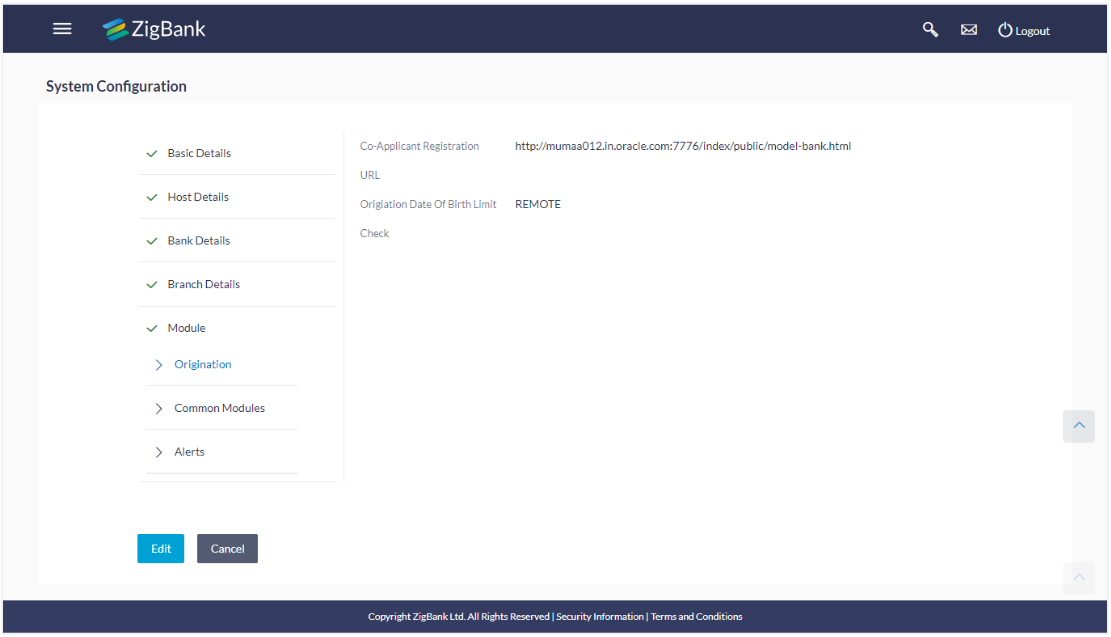
2.4.9 System Configuration - Module - Originations - View

Using this option, the system administrator maintains the originations module configurations. These details once defined can be viewed and edited using this transaction.

To view the originations module details:

Click system configuration option on the dashboard and navigate to **Originations** tab. The **System Configuration - Module – Originations** screen appears.

Module - Originations



Field Description

Field Name	Description
Co- Applicant Registration URL	Displays the URL defined for the registration of co-applicant.
Origination Date of Birth Limit Check	Displays the option defined date of birth limit check.

- Click **Edit** to edit the Originations Details. The **System Configuration - Originations Details** screen appears in editable form.

2.4.10 System Configuration - Module - Originations - Edit

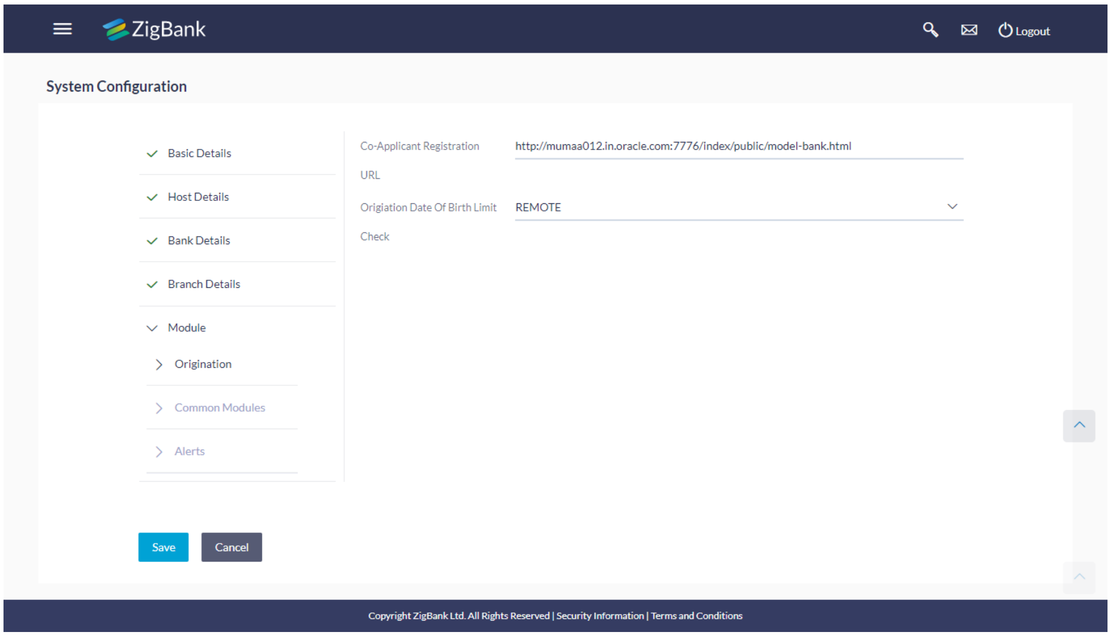
Using this option, system administrator can edit the originations module details.

To edit the originations module details:

In the **System Configuration** screen, click **Originations** tab. The **System Configuration - Module –** originations screen appears.

In the **System Configuration – Module - Originations** screen, click **Edit**. The **System Configuration – Module - Originations** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction.

Module – Originations - Edit



Field Description

Field Name	Description
Co- Applicant Registration URL	Displays the URL defined for the registration of co-applicant and available for edit.
Origination Date of Birth Limit Check	Displays the option defined date of birth limit check and available for edit.

- In the **Co- Applicant Registration URL** field, edit the URL if required.
- From the **Origination Date of Birth Limit Check** list, select the appropriate option.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Originations - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.

- The screen with success message of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

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2.4.11 System Configuration - Module – Common Modules - View

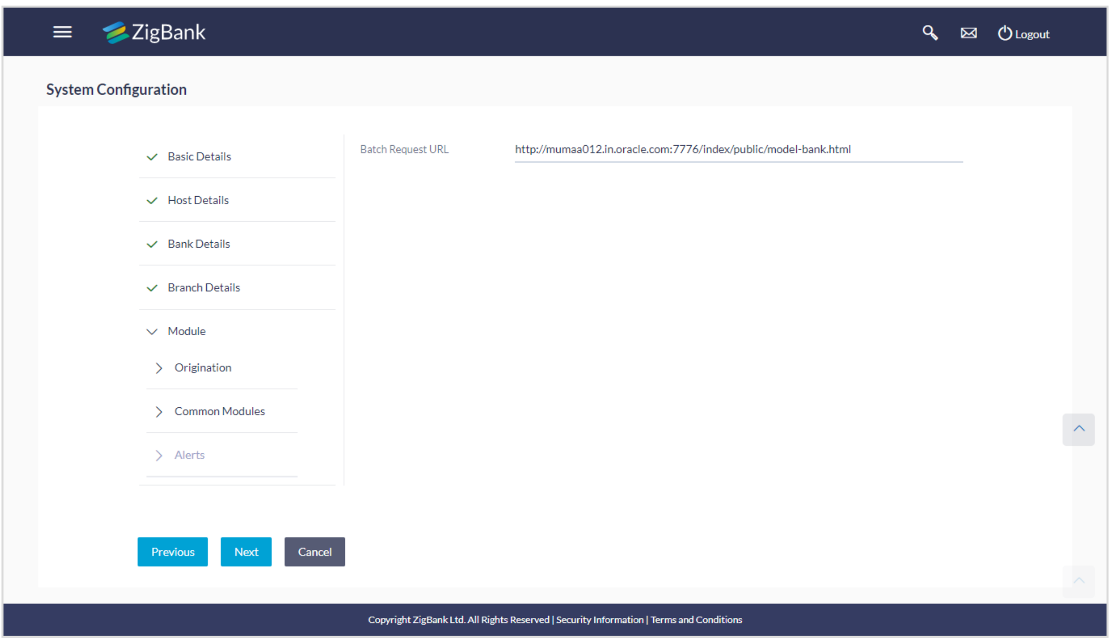
Using this option, the system administrator maintains the common modules. These configurations once defined can be viewed and edited.

To view the common module details:

In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.

Click the **Common Modules** tab. The **System Configuration - Module – Common Modules** screen appears

Module - Common Modules - View



Field Description

Field Name	Description
Batch Request URL	Displays the URL for the batch request.

- Click **Edit** to edit the Common Module Details. The **System Configuration - Module - Common Modules** screen appears in editable form.

2.4.12 System Configuration - Module - Common Modules - Edit

Using this option, system administrator can edit the common module details.

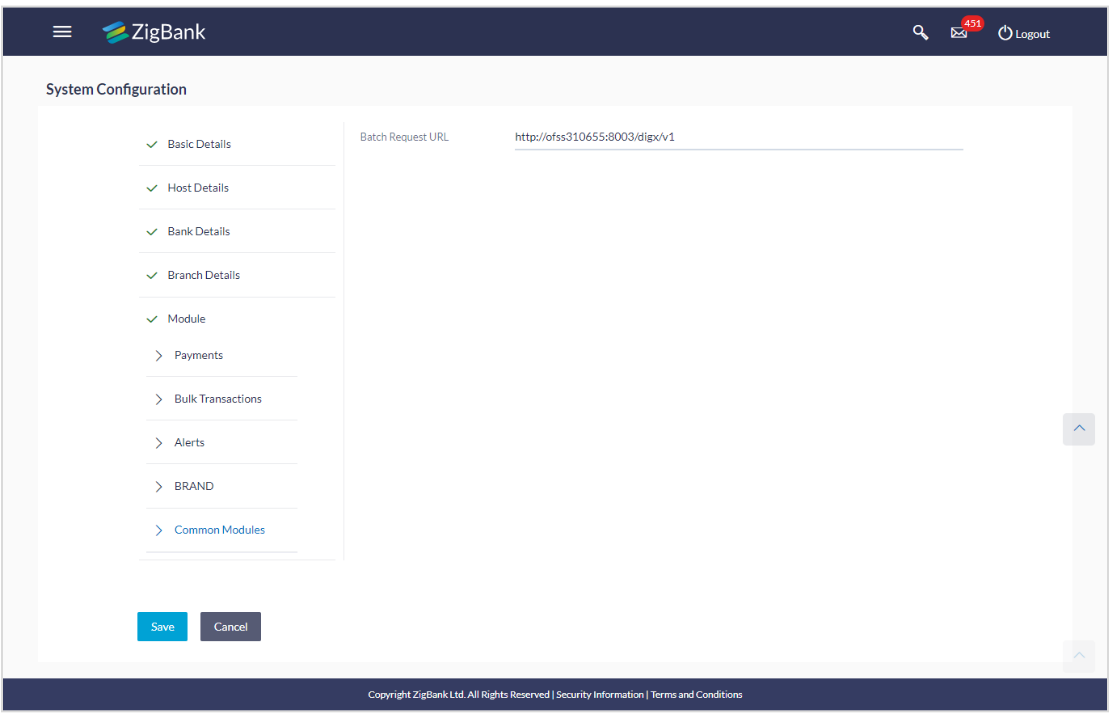
To edit the common modules details:

In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.

Click the **Common Module** tab. The **System Configuration - Module – Common Modules** screen appears.

In the **System Configuration - Module- Common Module** screen, click **Edit**. The **System Configuration – Module - Common Modules** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction.

Module - Common Modules - Edit



Field Description

Field Name	Description
Batch Request URL	Displays the URL for batch request and is available for edit

- In the **Batch Request URL** field, edit the web address if required.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the setup process.
- The **System Configuration – Common Modules** - **Review** screen appears. Verify the details and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR

Click the Branch Details, Module or Host Details tabs to view and edit the respective details if required.

- The screen with success message appears of saving the system configuration along with the status appears. Click **OK** to complete the transaction.

2.4.13 System Configuration - Module - Alerts - View

Alerts are generated by the system to notify users about a particular transaction.

The system administrator defines the server name and port number from which alerts is sent to the user during setting up of System Configuration.

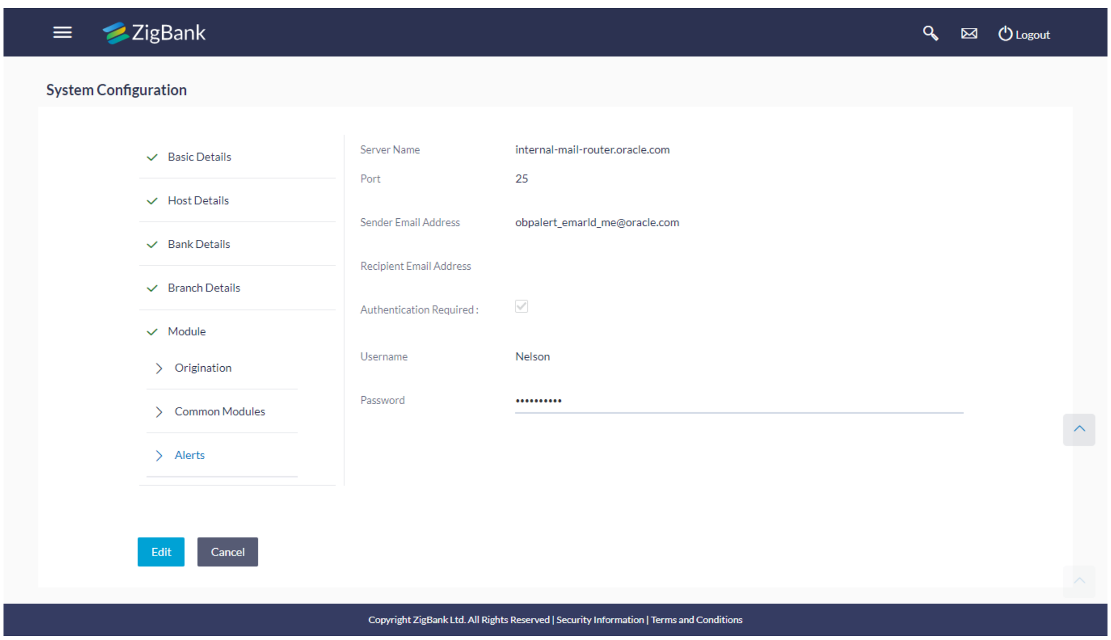
The other details like sender email address, receiver email address, whether authentication of the alerts is required, user name and password of the user are also configured during system configuration set up.

To view the Alerts module details:

In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.

Click the **Alerts** tab. The **System Configuration - Module – Alerts** screen appears.

Module - Alerts - View



Field Description

Field Name	Description
Server Name	Displays the name of the server as specified.
Port	Displays the port ID of the server.
Sender Email Address	Displays the email address of the sender of the alerts.
Recipient Email Address	Displays the email address of recipient of the alerts.

Field Name	Description
Authentication Required	Displays the check box selected/unselected if authentication is required.
User Name	Displays the user name of the user who receives alert.
Password	Displays the password corresponding to the user name.

- Click **Edit** to edit the Alerts. The **System Configuration - Alerts** screen appears in editable form.

2.4.14 System Configuration - Module - Alerts - Edit

Using this option, system administrator can edit the Alerts module details.

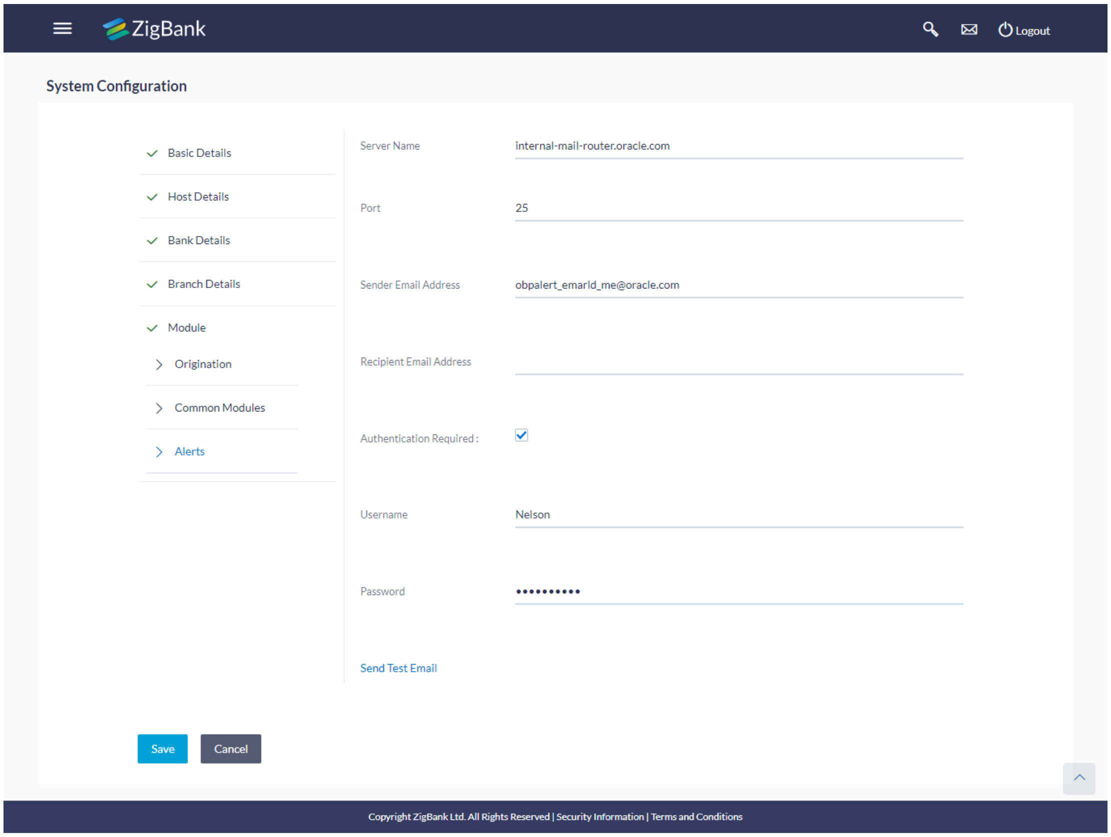
To edit the Alerts module details:

In the **System Configuration** screen, click **Module** tab. The **System Configuration – Module** screen appears.

Click the **Alerts** tab. The **System Configuration - Module – Alerts** screen appears.

In the **System Configuration - Module- Alerts** screen, click **Edit**. The **System Configuration - Module- Alerts** screen appears in editable form.
OR
Click **Cancel** to cancel the transaction.

Module - Alerts - Edit



Field Description

Field Name	Description
Server Name	Displays the name of the server and is available for edit.
Port	Displays the port ID and is available for edit.
Sender Email Address	Displays the email address of the sender of the alerts and is available for edit.
Recipient Email Address	Displays the email address of recipient of the alerts and is available for edit.
Authentication Required	Select the check box, if authentication is required/not required.
User Name	Displays the user name of the user who receives alert and is available for edit.
Password	Displays the password corresponding to the user name.
Send Test Email	Click to receive the test email on the specified email ID.

- In the **Server Name** field, edit the name of the server, if required.
- In the **Port** field, edit the port id, if required.
- In the **Sender Email Address** field, edit the email address of the sender, if required.
- In the **Recipient Email Address** field, enter the email address of the recipient.
- Select the check box, if authentication is required.
- In the **User Name** and **Password** field, enter the user name and password.
- Click the **Send Test Email** link to send a test email.
- Click **Save** to save the changes.
  OR
  Click **Cancel** to cancel the transaction.
- The **System Configuration - Module - Alerts - Review** screen appears. Verify the details, and click **Confirm**.
  OR
  Click **Cancel** to cancel the transaction.
  OR
  Click the Branch Details, Module or Host Details tabs to view and edit the respective details.
- The screen with success message appears of saving the system configuration along with the status appears. Click **OK** to complete the transaction.