# Oracle Banking Digital Experience

OBP Base Setup and Configuration Guide Release 18.1.0.0.0

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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 <u>http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.</u>

#### 1.3 Access to OFSS Support

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

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

The subsequent chapters describes following details:

- Introduction
- Preferences & Database
- Configuration / Installation.

#### 1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 18.1.0.0.0, refer to the following documents:

User Manual Oracle Banking Digital Experience Installation Guide

# 2. Introduction

This document is intended for setting up OBDX 18.1.0.0.0 with OBP 2.5.0.2 Base release.

# 3. Database Tables and Alert Configuration

Please complete day one maintenance from admin screen. Please refer 'User Manual Oracle Banking Digital Experience System Configuration.docx' document for day one maintenance.

# 4. Configurations

• DIGX\_FW\_CONFIG\_ALL\_B

Category Id	Property Id	Description
OriginationUs erRole	USER_ROLE_CUSTOMER	Default roles for Origination user creation. The prop_id does not matter. All roles for category_id 'OriginationUserRole' would be assigned to the created user.
OriginationAle rtConfig	BANK_NAME	Property value is used in Originations related Alerts. Prop_Value in Base : 'EMERALD ME BANK'
OriginationCo nfig	ORG_DOB_AGE_LIMIT_CHECK	Whether DOB check is local or to be done remotely. Possible values are LOCAL or REMOTE.
OriginationCo nfig	ORG_DOB_AGE_LIMIT	DOB Age Limit Value. In case the above property value is LOCAL, the age limit (as number of years) in number is to be specified for this property.
OriginationCo nfig	FUNDING_OPTIONS_FOR_EXISTIN G	Funding Options for Existing Party. Values mentioned here should be values from 'com.ofss.obp2502.enumeration.settle ment.SettlementModeType'. Only these funding modes will be available in OBDX.
OriginationCo nfig	FUNDING_OPTIONS_FOR_NON_E XISTING	Funding Options for Non-Existing Party. Values mentioned here should be values from 'com.ofss.obp2502.enumeration.settle ment.SettlementModeType. Only these funding modes will be available in OBDX.
OriginationCo nfig	CARD	Two types of categories of Cards. If settlement mode 'FUNDING_OPTIONS_FOR_NON_E XISTING' contains 'CARD', then what cards should be allowed should be mentioned here. Possible 'CARD_CREDIT,CARD_DEBIT' (comma separated)
Category Id	Property Id	Description

OriginationCo nfig	USERNAME_TYPE	Username type while registering the prospect. Possible values EMAIL/OTHERS
OriginationCo nfig	LIST_CANCELLATION_DAYS	Submission Cancellation List Range. This value will be used in Report Generation for Cancelled Applications. This property indicates the number of days for which the cancellation report will be generated.
OriginationCo nfig	ORIG_PI_EMAIL_VERIFICATION_R EQUIRED	If Email Verification via OTP is required.

Apart from these mandatory changes, there are few non-mandatory configurations for 'OriginationConfig' category id in DIGX\_FW\_CONFIG\_ALL\_B to change system behavior which are:

Property Id	Description	Default value
CONTACT_INFO	This property allows admin to enable or disable de-dupe check for contact information. Possible values can be 'true' or 'false'.	false
CONTENT_UPLOAD_A LLOWED_TYPE_LIST	This property contains allowed file types and	.txt,.png,.xlsx,.doc,.pdf,.jpeg,.jpg
CONTENT_UPLOAD_M IME_TYPES_WHITE_LI ST	MIME type (comma separated) which can be uploaded by user at various stage of Origination process.	application/pdf,image/jpeg,image/png,appli cation/x-compressed,application/x-zip- compressed,application/zip,application/ms word,application/vnd.openxmlformats- officedocument.wordprocessingml.docume nt,text/plain,application/pdf,application/vnd .ms-excel,application/vnd.openxmlformats- officedocument.spreadsheetml.sheet
CONTENT_UPLOAD_M IME_TYPES_ZIP_LIST	This property contains allowed zipped file types and MIME type which can be uploaded by user at various stage of Origination process.	application/x-compressed,application/x- zip-compressed,application/zip
DATA_REQUIRED_FO R_SUBMISSION	This property determines whether to send applicant's data with submission id at submission stage or not.	false

Property Id	Description	Default value
	For obp base set up values of the property id should always be false.	
DRIVING_LICENSE_EX PIRY_DURATION	This property contains maximum years allowed for the expiry duration of driving license.	15
DRIVING_LICENSE_M AX_LENGTH	This property contains maximum length allowed for the id of driving license.	30
EMPLOYMENT_INFO	This property allows admin to enable or disable de-dupe check for employment information. Possible values can be 'true' or 'false'.	false
EMPLOYMENT_STABI LITY_MONTH_DURATI ON	This property contains minimum duration (in years) of employment needs to be captured during the origination process.	12
IDENTITY_INFO	This property allows admin to enable or disable de-dupe check for identity information. Possible values can be 'true' or 'false'.	false
INTEREST_ONLY_STA GES	This property contains list of Interest only stages supported by the system.	IOI,IOA
IS_CAPITALIZE_FEES_ ENABLE	This property allows admin to enable or disable capitalization of fee. Possible values can be 'true' or 'false'.	true
IS_LMI_ENABLED	This property determines whether to consider LMI while calculating funding details.	false
	Contains value for LMI	

Property Id	Description	Default value
	capitalization. Value can be 'true' or 'false'.	
IS_NOMINATE_FOR_F EE	This property determines whether applicant is nominated for fees consideration while calculating funding details.	true
IS_REGISTRATION_M ANDATORY	This property determines whether registration of applicant before submission is mandatory or not. If value is 'true', the applicant has to register himself as a user before final submission. Else applicant can directly progress for final submission.	false
MANDETORY_DOCUM ENT_CHECK_NEEDED	This property determines whether to display all documents or only mandatory documents. Possible values can be 'true' or 'false'.	false
MAX_ALLOWED_VEHI CLE_AGE	This property contains maximum allowed age (in years) for used vehicles.	10
ORG_REG_LINK_TIME OUT	This property contains time out value (in minutes) for Registration link for co- applicant.	15
ORIGINATION_DEALE R_REDIRECTION_URL	This property contains URL used for redirecting user from dealer page to bank.	http://\${OBDX.WEB.HOST}:\${OBDX.WEB .PORT}/index/public/model- bank.html?module=payday&context=index
ORIGINATION_WORKF LOW_LOADER	This property contains configuration whether to fetch workflow from database or from cache. Possible Values can be CACHE (for	DB

Property Id	Description	Default value
	fetching workflow from cache) or DB(for fetching workflow from database.	
PRIMARY_INFO	This property allows admin to enable or disable de-dupe check for primary information. Possible values can be 'true' or 'false'.	false
PRINCIPAL_STAGES	This property contains list of principal only stages supported by the system.	EPI,EIPI
VEHICLE_MILEAGE_M AX_LIMIT	This property contains allowed maximum mileage for used vehicle.	125000
VEHICLE_YEAR_MAX_ LIMIT	This property contains maximum difference allowed (in year)between system date and Vehicle Manufacturing	10
	year.	

### 4.1 **OBP Application Configurations**

Following maintenance/configurations should be done in OBP application.

#### 4.1.1 Funding table template maintenance

This maintenance decides which all sections like LMI, Fees should be part of funding table.

#### 4.1.2 Application level fees

This maintenance decides which all fees like 'Title Search fee', 'Registration fee' should be shown on application tracker and funding table.

#### 4.1.3 Financial template maintenance

This maintenance decides which all income, expense, liability and asset should be visible as part of financial template. It is also used to decide the mandatory and non-mandatory options for income, expense, liability and asset.

### 4.2 OUD configuration in OBP:

OUD configuration is mandatory in OBP if save for later or existing user flow is needed in OBDX originations.

OUD configuration steps for OBP HOST and OBP SOA:

1. Go to admin console of OBP host.

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Apps 📃 OBP 2.4 📃 OBP 2.3 📃	GN 📙 OBP 2.5 🥃 Form on BACKUP_DE 🧕 Das	hboard [Jenkins] 🥃 B-QA 🥃 LZ-S 🎦 soa-comp 🕴	[O grok 🏆 Central-JIRA 🖸 ZigBank - Product 🦄 sonar 🧧 LZ-IT 🛛 🗙
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/iew changes and restarts	Home		
Click the Lock & Edit button to modify, add or delete items in this domain.	Home Page		
Lock & Edit	- Information and Resources		
Release Configuration	Helpful Tools	General Information	
	Configure applications	Common Administration Task Descriptions	
Domain Structure	Configure GridLink for RAC Data Source	<ul> <li>Read the documentation</li> </ul>	
ost_domain	Recent Task Status	<ul> <li>Ask a question on My Oracle Support</li> </ul>	
- Environment	<ul> <li>Set your console preferences</li> </ul>	<ul> <li>Oracle Guardian Overview</li> </ul>	
Deployments B-Services	<ul> <li>Oracle Enterprise Manager</li> </ul>		
Security Realms	- Domain Configurations		
Interoperability     Diagnostics	Domain	Services	Interoperability
-	Domain	Messaging	WTC Servers
	- Domain	<ul> <li>IMS Servers</li> </ul>	Init Connection Pools
	Environment	<ul> <li>Store-and-Forward Agents</li> </ul>	• Sole connection Polis
	Servers	<ul> <li>JMS Modules</li> </ul>	Diagnostics
	Clusters	<ul> <li>Path Services</li> </ul>	Log Files
	Virtual Hosts	<ul> <li>Bridges</li> </ul>	Diagnostic Modules
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Search the configuration	Coherence Servers	Persistent Stores	Request Performance
Use the Change Center	Coherence Clusters	XML Registries	Archives
Record WLST Scripts	Machines	XML Entity Caches	Context
Change Console preferences	Work Managers	<ul> <li>Foreign JNDI Providers</li> </ul>	SNMP
Manage Console extensions	Startup And Shutdown Classes	Work Contexts	
Monitor servers		• jCOM	Charts and Graphs
	Your Deployed Resources	<ul> <li>Mail Sessions</li> </ul>	Monitoring Dashboard
System Status 🖂	Deployments	FileT3	
		<ul> <li>ITA</li> </ul>	

2. Go to security realms on the left panel.

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st_domain	Recent Task Status	<ul> <li>Ask a question on My Oracle Support</li> </ul>	
-Environment	<ul> <li>Set your console preferences</li> </ul>	Oracle Guardian Overview	
Deployments Services	Oracle Enterprise Manager		
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Click the Lock & Edit button to modify, add or delete items in this domain.	Summary of Security Realms		
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B-Environment	Customize this table		
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Delete security realms			
Change the default security realm			
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4. Go to the tab providers.

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Click the Lock & Edit button to modify, add or delete items in this domain.	Settings for myrealm		
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Release Configuration	General RDBMS Security Store Us	er Lockout Performance	
Domain Structure	Click the Lock & Edit button in the Cha	nge Center to modify the settings on this page.	
host_domain	Save		
Deployments			
-Services	Use this page to configure the general t	behavior of this security realm.	
B-Interoperability	Note: If you are implementing securit	v using JACC (Java Authorization Contract for Containers as def	ined in JSR 115), you must use the DD Only security model. Other WebLogic Server models are not available
E→Diagnostics	and the security functions for W	Veb applications and EJBs in the Administration Console are disa	bled.
	Name:	myrealm	The name of this security realm. More Info
	👸 Security Model Default:	DD Only •	Specifies the default security model for Web applications or EJBs that are secured by this security realm. You can override this default during deployment. More Info
	🗹 🚑 Combined Role Mapping Enab	bled	Determines how the role mappings in the Enterprise Application, Web application,
How do I	-		and EJB containers interact. This setting is valid only for Web applications and EJBs that use the Advanced security model and that initialize roles from deployment
<ul> <li>Manage security for Web applications and EJBs</li> </ul>			descriptors. More Info
Set the default security model	🔲 近 Use Authorization Providers t	to Protect JHX Access	Configures the WebLogic Server MBean servers to use the security realm's Authorization providers to determine whether a JMX dient has permission to access
Delegate MBean authorization to the realm			an MBean attribute or invoke an MBean operation. More Info
System Status	- Advanced		
Health of Running Servers			
Failed (0)	Click the Lock & Edit button in the Cha	nge Center to modify the settings on this page.	
Critical (0)			7

5. Click on lock and edit button. After that New button will be enabled. Create a new provider, by clicking on New button.

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6. Enter the name for the provider and the type of the provider. And click on Ok button.

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View changes and restarts Home >Summary of Security Realma >myrealm >Providers
No pending changes exist. Click the Release Create a New Authentication Provider
domain. OK Cancel
Lock & Edit  Release Configuration  Create a new Authentication Provider
Release Computation The following properties will be used to identify your new Authentication Provider.
Domain Structure * Indicates required fields
host_domain ( 0° Environment The name of the authentication provider.
Deployments     Deploymen
Security Realms Objective Objectiv
Diagnostics     This is the type of authentication provider you wish to create.
Type:
OK Cancel

7. You will see the new added provider on the bottom. Click on reorder button, to reorder the providers and make OUD provider on the top. Click on Ok button to save changes. You will see the OUD provider on the top (for SOA make OUD on second priority i.e., after OIDAuthenticator).

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Configure Authentication and Identity	DefaultAut	henticator	WebLogic	Authentication Pro	wider						1	1.0	
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View changes and restarts	Home >Summary of Security Realms >myrealm >Providers	
Pending changes exist. They must be activated to take effect.	Reorder Authentication Providers	
Activate Changes	OK Cancel	
Undo All Changes	Reorder Authentication Providers	
Domain Structure	You can reorder your Authentication Providers using the list below. By reordering Authentication Providers, you can alter the authentication sequence.	
host, domain ⊖ Environment → Dejoyments → Services → Services → Services → Services → Services → Services	Select authenticator(s) in the list and use arrows to move them up and down in the list.	
How do I 🗉	OK Cancel	
Re-order Authentication providers     Set the JAAS control flag		
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Pending changes exist. They must be activated to take effect.	Reorder Authentication Providers
Activate Changes	OK
Undo All Changes	Reorder Authentication Providers
Domain Structure	You can reorder your Authentication Providers using the list below. By reordering Authentication Providers, you can alter the authentication sequence.
host_Gomain <sup>1</sup> Environment <sup>1</sup> Oeloyments <sup>1</sup> Services <sup>1</sup> Services <sup>1</sup> Interoperability <sup>1</sup> Diagnostics	Select authenticator(s) in the list and use arrows to move them up and down in the list.
How do I	Cancel
Re-order Authentication providers	
Set the JAAS control flag	
System Status	
Health of Running Servers	
Failed (0)           Critical (0)           Overloaded (0)	-

8. Click on OUD provider and go to configurations tab and set control flag to sufficient and save changes.

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Pending changes exist. They must be activated to take effect.	Settings for myrealm		
Activate Changes	Configuration Users and Groups	Roles and Policies Credential Mappings Providers Migration	
Undo All Changes	Authentication Password Validat	ion Authorization Adjudication Role Mapping Auditing Credential Mapping Certification Path Keystores	
host_domain @I-Environment I-Dogloyments @I-services II-security Realms II-Interoperability III-Diagnostics	a security realm. Different types of A	eblogic Server to establish trust by validating a user. You must have one Authentication provider in a security realm, and you can configure multiple Auth undernication provides are designed to access different data stores, such as LDAP servers or DBHS. You can also configure a Realm Adapter Authenticat oups from previous releases of WebLogic Server.	
	Name	Description	Version
	OBDXOUD	SAML 2.0 Identity Assertion Provider. Supports Security Assertion Markup Language v2.0.	1.0
	OUDINS	Provider that performs LDAP authentication	1.0
How do I 🖂	OBDX_OUD	Provider that performs LDAP authentication	1.0
Configure Authentication and Identity	OIDAuthenticator	Provider that performs LDAP authentication	1.0
Assertion providers  Configure the Password Validation provider	DefaultAuthenticator	WebLogic Authentication Provider	1.0
Manage security providers	DefaultIdentityAsserter	WebLogic Identity Assertion provider	1.0
Set the JAAS control flag	New Delete Reorder	Showing 1 to 6	of 6 Previous   Next
Re-order Authentication providers			
System Status			
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Pending changes exist. They must be activated to take effect.	Settings for OBDXOUD		
Activate Changes	Configuration Management	Migration	
Undo All Changes	Common Provider Specific		
Domain Structure	Save		
host_domain + convironment 	This page displays basic inform	ation about this iPlanet Authentication provider. You can also use this page to s	et the JAAS Control Flag to control how this provider is used in the login sequence.
Services     Security Realms	街 Name:	OBDXOUD	The name of this iPlanet Authentication provider. More Info
<ul> <li>Interoperability</li> <li>Diagnostics</li> </ul>	街 Description:	Provider that performs LDAP authentication	A short description of this iPlanet Authentication provider. More Info
	🛃 Version:	1.0	The version number of this iPlanet Authentication provider. More Info
	街 Control Flag:	SUFFICIENT T	Specifies how this iPlanet Authentication provider fits into the login sequence. More Info
How do I	Save		
Configure Authentication and Identity     Assertion providers			
Set the JAAS control flag			
Configure the Password Validation provider     Manage security providers			
Manage security providers			
System Status			
Health of Running Servers			

9. Click on provider specific tab to enter details of the OUD. Such as host, port, principal credentials, user base DN, group base DN etc. and save changes. Restart all servers for this configuration to take effect.

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Activate Changes Configuration Management Migration	_
Undo All Changes Common Provider Specific	
Domain Structure Save	
host_domain (1) Environment - Degloyments - Degloyments	
IP: Services     Image: OBDX00D     The name of this iPlanet Authentication provider. More Info	
Image: state of the second st	
F Version: 1.0 The version number of this IPlanet Authentication provider. More Info	
def Control Flag:         SUFFICIENT •         Specifies how this iPlanet Authentication provider fits into the login sequence. More Info	
Save	
How do L	
Configure Authentication and Identity     Assettion providers	
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View changes and restarts	Home >Summary of Security Realms >myrealm >Providers >OBDXOUD >Providers >OBDXOUD >Providers >OBDXOUD	
Pending changes exist. They must be activated to take effect.	Settings for OBDXOUD	
Activate Changes	Configuration Management Migration	
Undo All Changes	Common Provider Specific	
Domain Structure	Save	
host domain		
Environment Deployments	Use this page to define the provider specific configuration for this iPlanet Authentication provider.	
E -Services	- Connection	
Security Realms Interoperability Diagnostics	Host: The	host name or IP address of the LDAP server. More Info
	F Port:	port number on which the LDAP server is listening. More Info
	d∰ Principal: The conr	Distinguished Name (DN) of the LDAP user that WebLogic Server should use to nect to the LDAP server. More Info
	Credential: The Info	credential (usually a password) used to connect to the LDAP server. More
How do I	Confirm Credential:	
<ul> <li>Configure Authentication and Identity Assertion providers</li> </ul>		
Manage security providers		ifies whether the SSL protocol should be used when connecting to the LDAP er, More Info
System Status	- Users	
Health of Running Servers		base distinguished name (DN) of the tree in the LDAP directory that contains
Failed (0)		. More Info
Critical (0)	الله الله الله الله الله الله الله الله	e attribute (user object class) is not specified (that is, if the attribute is null or ty), a default search filter is created based on the user schema. More Info

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	震 User Object Class:	person		The	LDAP object class	that stores users. More	Info
	🗌 🅳 Use Retrieved User Name as Principal					ot the user name retrieve the Subject. More Info	d from the LDAP server should b
	Groups						
	🕂 Group Base DN:				base distinguished ips. More Info	I name (DN) of the tree i	n the LDAP directory that contain
	🚝 All Groups Filter:			nam	e (DN). If the attri	bute is not specified (that	eath the base group distinguished it is, if the attribute is null or emp iroup schema. More Info
	👸 Group From Name Filter:	(l(&(cn=%g)(objectclas	s=gro	attrit	bute is not specifie		the name of the group. If the is null or empty), a default searc fore Info
	denote Search Scope:	subtree V			cifies how deep in t ree and onelevel.		o search for groups. Valid values
	🛃 Group Membership Searching:	unlimited <b>T</b>				p searches into nested g nd limited. More Info	roups are unlimited or limited. Va
	ත්ටු Max Group Membership Search Level:	0		valid	l only if GroupMem tive integers. For e	bershipSearching is set t xample, 0 indicates only	p can be searched. This setting is to limited. Valid values are 0 and direct group memberships will be ther of levels to search. More In
	🔲 近 Ignore Duplicate Membership					uplicate members are ign Group membership. Mo	ored when adding groups. The re Info
	- Static Groups						
	街 Static Group Name Attribute:	cn			attribute of a stati p. More Info	c LDAP group object that	specifies the name of the
	🚓 Static Group Object Class:	groupofuniquenames		The	name of the LDAP	object class that stores	static groups. More Info
	🚝 Static Member DN Attribute:	uniquemember				c LDAP group object that of the group. More Info	specifies the distinguished name

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	🛃 Connection Retry Limit:	1	Specifies the number of times to attempt to connect to the LDAP server if the ini connection failed. More Info
	👸 Parallel Connect Delay:	0	The delay in seconds when making concurrent attempts to connect to multiple Li servers. More Info
	🛃 Results Time Limit:	0	The maximum number of milliseconds for the LDAP server to wait for results beft timing out. If this attribute is set to 0, there is no maximum time limit. More Int
	🔲 🕂 Keep Alive Enabled		Specifies whether to prevent LDAP connections from timing out. More Info
	🗹 🛃 Follow Referrals		Specifies that a search for a user or group within the LDAP Authentication provid will follow referrals to other LDAP servers or branches within the LDAP directory. default, this attribute is enabled. More Info
	🗐 🕀 Bind Anonymously On Referrals		By default, the LDAP Authentication provider uses the same DN and password us to connect to the LDAP server when following referrals during a search. If you we to connect as an anonymous user, enable this attribute. More Info
	Cause For Login Exception		Specifies whether the providers should propagate the cause of the LoginException. More Info
	🗹 🚓 Cache Enabled		Specifies whether a cache is used with the LDAP server More Info
	街 Cache Size:	32	The size of the cache (in kilobytes) that is used with the LDAP server More Info
	🥂 Cache TTL:	60	The time-to-live of the cache (in seconds) that is used with the LDAP server $\ensuremath{{\rm Me}}$ Info
	🛃 GUID Attribute:	nsuniqueid	Specifies the name of the GUID attribute defined in the Sun iPlanet Directory LDJ server. The default value is nsuniqueid. More Info
	Save		

### 5. **Product configuration**

To enable the products execute the following script.

Update DIGX\_OR\_PRODUCT\_TYPE set STATUS = 'ACTIVE' where ID IN ('SAVINGSH1', 'CHECKINGH1', 'TERMDEPOSITH1', 'CREDITCARDH1', 'AUTOLOANH1', 'AUTOLOANH1', 'PERSONALLOANH1', 'MORTGAGELOANH1', 'MORTGAGELOANIPAH1');

This will enable the savings, checking, term deposits, credit cards, auto loans, personal loans, mortgage loans and in principal approval (for mortgage loans) products.

### 6. Credential mapping for anonymous access

Please refer to the document <u>Oracle Banking Digital Experience Origination Web service Username</u> <u>Token Configuration.docx</u> for "*Anonymous user configuration*".

This will add the security policy, policy key and credentials for anonymous user.