Getting Started User Guide

Oracle Banking

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Getting Started User Guide
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Welcome to Getting Started User Guide

The Procedure User Guide helps you get started with Oracle Banking applications. This user guide explains the basic design of Oracle and the common operations that you can follow while using it. This user guide should be used as a supplement and must be read in conjunction with Common Core, Security Management System and other application user guides.

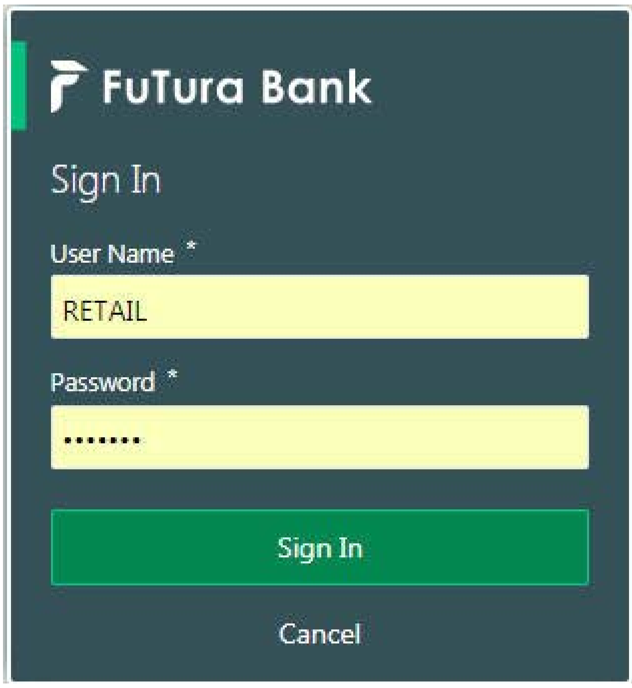
This document is intended for the Customer Service Representatives (CSRs) and staff in charge of setting up new products in your bank.

Accessing Application

You can access any application using the link provided by the administrator.

Signing In

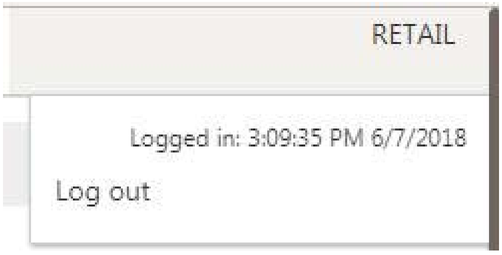
1. Enter the URL in the browser address and press **Enter**. The application page appears.



2. Provide the required information:
   - User Name: Enter the user name provided by the administrator.
   - Password: Enter the password provided by the administrator.
3. Click **Sign In** to log into the application.

Signing Out

1. In the selected application > toolbar, click the user name logged into the application. The **User Profile** fly-out menu appears.



2. Click **Log Out** to sign out of the application.

Application Environment

On successful login, the selected application appears depending on the user privileges. A sample illustration of the home page:

1. **Hamburger Menu**: Use to expand/collapse the menu.
2. **Menu**: Use to navigate/open the screens associated with the application.
3. **Sub-Menu**: Click the menu to view the sub-menu associated with the menu. These are screens associated with the menu.
4. **Display Grid**: Displays the screens/dashboards selected using the menu.
5. **Bank Name**: Displays the name of the bank.
6. **Branch Code**: Displays the branch associated with the bank. Click to select the branches associated with the logged in user.
7. **Date**: Displays the date on which the branch's EOD was last performed.
8. **User Profile**: User profile related options and actions are available.

How to's

As a new user you might require to perform a set of tasks that are similar in all the screens such as to view, edit, delete existing records and more. These tasks explain how to begin working with your record:

Viewing Records	Searching Records
Editing Records	Copying Records
Unlocking Records	Deleting Records
Printing Records	Authorizing Records
Minimizing Records	Closing Records

When you are working with records, it is important to remember that the types of records you can create, view, edit, delete, and so on are determined by administrator settings, such as a user profile or permission set. Work with your administrator to ensure you have access to the records and data you need.

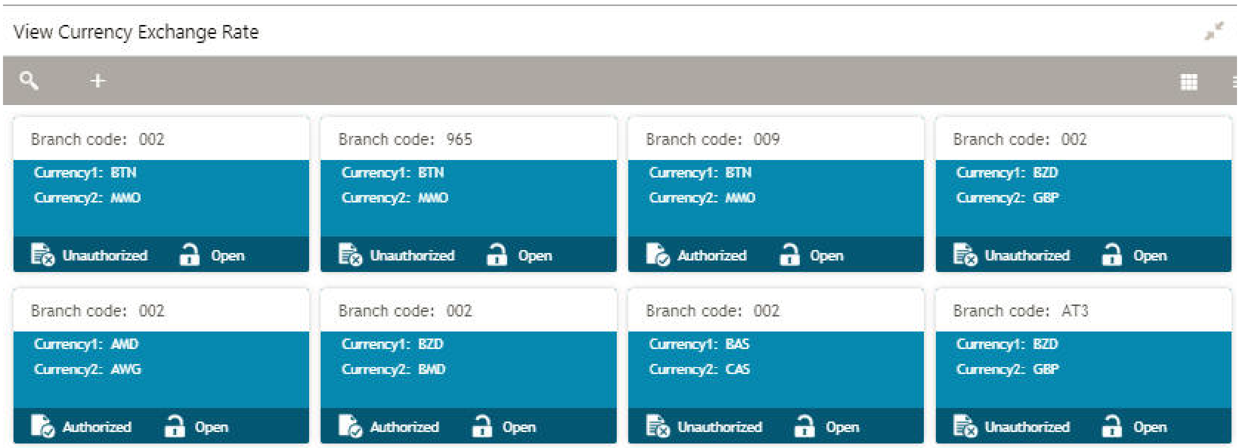
Now that you have learned how to work with your records, you might want to explore more advanced features.

Viewing Records

You can view the summary of all the configured records in the selected summary screen. This helps you to find the required record faster. A few different ways to view the records are described.

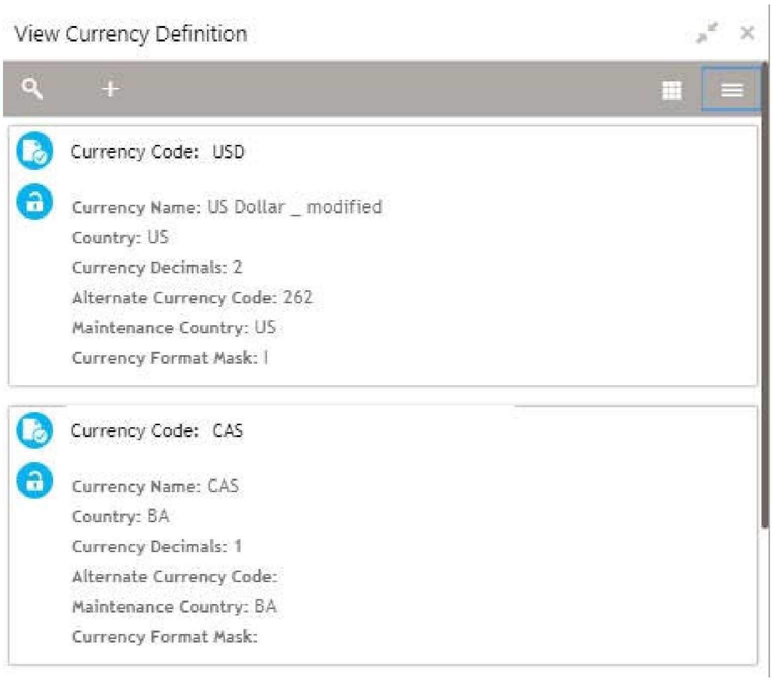
Tile View

The default summary view of the records are tile view. You can view the records that appear in a tile format.



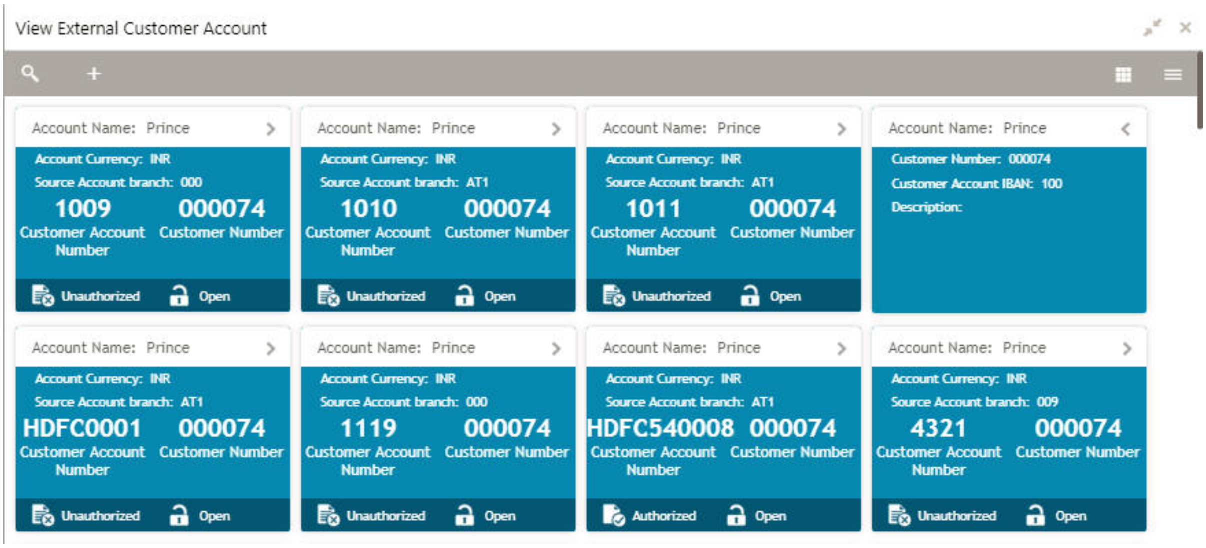
List View

- Click **List View**, you can view the records that appear in a list view.



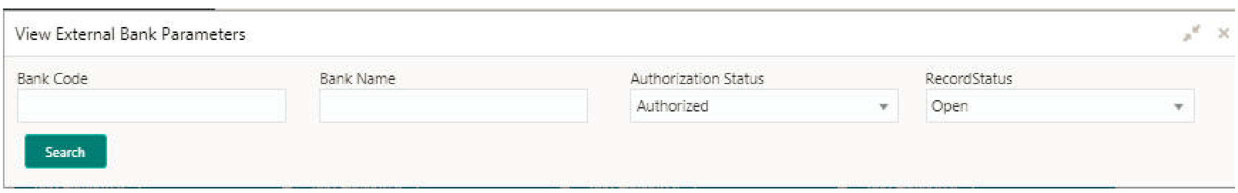
Flip View

- Click **Flip View** on the record, you can view the records that appear in a flip view.



Searching Records

1. In the selected screen, click **Search**, the fields associated with the selected screen appear in a dropdown menu.



2. Provide the required details associated with the selected screen.
3. Click **Search** to view the requested record.

Editing Records

Note

Ensure you have the privileges and know the guidelines to modify the records.

1. In a selected screen, click a record and make the required changes to the record.
2. Click **Save** to save the modified record.

Copying Records

1. In a selected screen, click a record.
2. Click **Copy** to copy the selected record details and make the required changes to the record such as name.
3. Click **Save** to save the modified record.

Unlocking Records

1. In a selected screen, click a record.
2. Click **Unlock** to unlock the selected record details and make the required changes to the record such as name.
3. Click **Save** to save the modified record.

Deleting Records

Note

Ensure you have the privileges and know the guidelines to delete the records.

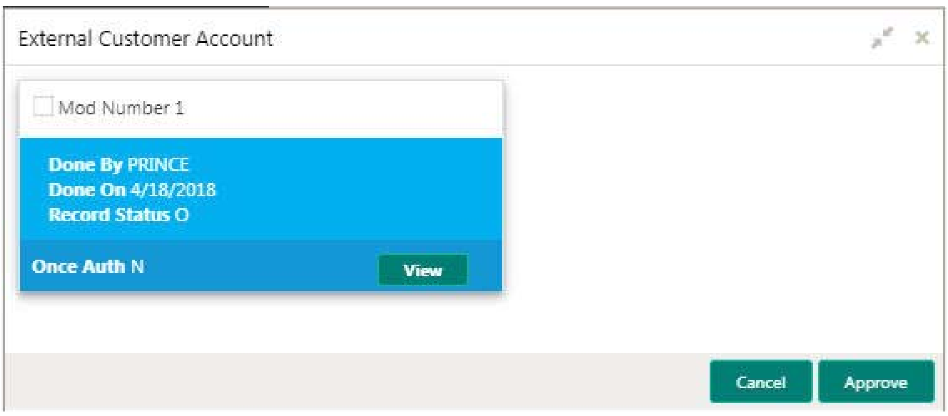
- In a selected virtual page, select a record and click **Delete** to remove the record.

Printing Records

1. In a selected screen, click a record.
2. Click **Print** to view the record in a print format and print the records.

Authorizing Records

1. In the selected screen, click a record.
2. Click **Authorize**, the records associated with the selected screen that must be authorized appears.



3. Select the required record that must be authorized.

4. Click **Approve** to authorize the record.

Minimizing Records

- In the selected screen, click **Collapse** to minimize the screen. The minimized screen appears at the bottom of the page.

Closing Records

- In the selected screen, click **Remove** to close the screen. If you are in the middle of creating/ modifying the records in a selected screen, an error/warning message appears prompting to save the changes.

Screen/Dashboard

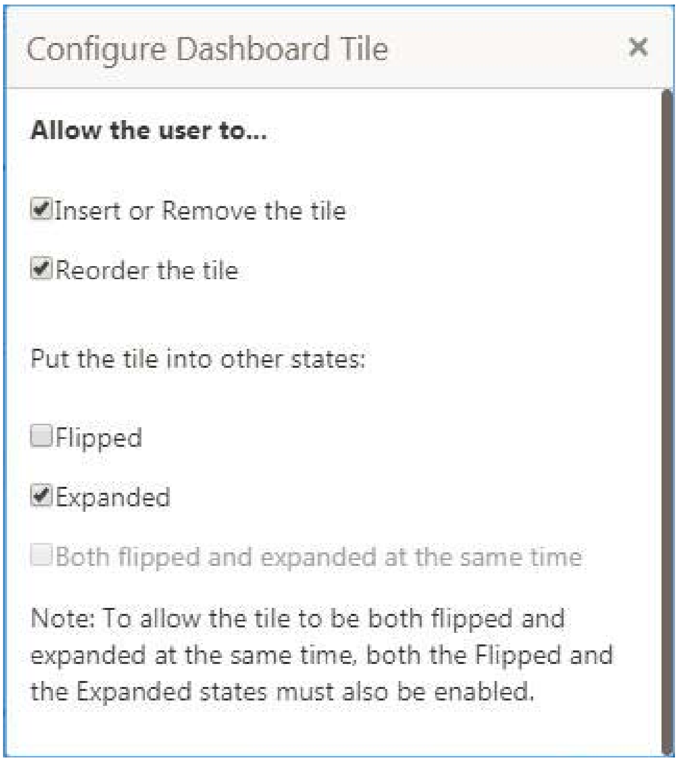
There are several actions that can be performed in a selected screen/dashboard.

Mandatory and Optional Fields

There are mandatory and optional fields available for any screen. You can identify the mandatory field with (*) symbol. The mandatory fields are also highlighted as an error if the user does not enter any value for it.

Configuring Tile

1. Click **Configure Tile**, the **Configure Dashboard Tile** popup page appears.



2. Select the required options:

Allow the user to...

- Insert or Remove the tile: If selected, you can remove the dashboard widget from the dashboard landing page.
- Reorder the tile: If selected, you can rearrange the dashboard widget in the dashboard landing page.

Put the tile into other states:

- Flipped: If selected, you can flip the dashboard widget for more information.
- Expanded: If selected, you can expand the dashboard widget in the dashboard landing page.
- Both flipped and expanded at the same time: If selected, you can flip and expand the dashboard widget in the dashboard landing page.

3. Click **Close** to update the dashboard widget configuration.

Closing Tile

- Click **Remove** to remove the dashboard widget from the landing page. The removed widgets are available under the **Add Tiles** option.

Reordering Tile

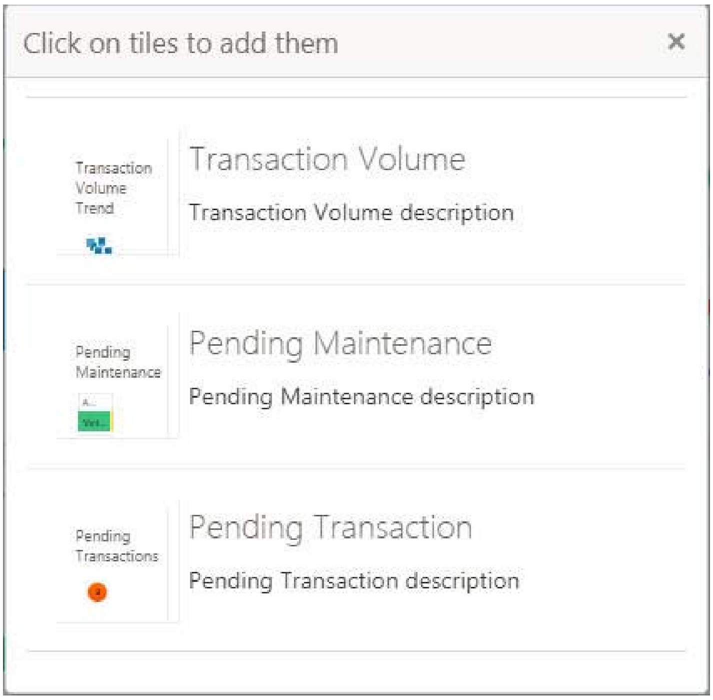
- Select and drag the **Drag to Reorder** option to drop the dashboard widget at the desired place. The page is automatically refreshed and displays the updated order.

Expanding Tile

- Click **Expand Tile** to view all the information of the dashboard widget. The expanded widget appears on a complete row to view more information.

Adding Tile

1. Click **Add Tiles** to Dashboard to add more dashboard widget to the dashboard landing page. The C**lick on Tiles to Add Dashboard** popup screen appears.



2. Click on the dashboard you want to add to the dashboard landing page.The page is automatically refreshed and displays the added dashboard widget.

Common Fields

Provides information about all the common fields available in the application.

Field	Description
Branch Code	You can select a configured branch code which you want to associate with the selected screen.
Maker	Displays the name of the logged in user who created the record.
Customer Number	You can select a configured customer number which you want to associate with the selected screen. You can configure the customer number using the **Create External Customer** screen.
Account Number	You can select a configured account number which you want to associate with the selected screen. You can configure the account number using the **Create External Customer Account** screen.
Source System	You can select a configured source system which you want to associate with the selected screen. You can configure the source system using the **Create Upload Source** screen.
Host Code	You can select a configured host code which you want to associate with the selected screen. You can configure the host code using the **Create Host Code** screen.
Currency	You can select a configured currency which you want to associate with the selected screen. You can configure the currency using the **Create Currency Definition** screen.
Status	Displays the status of the record: • Authorized: The record is verified and authorized. • Unauthorized: The record is not verified. • Open: The record is open and waiting for verification. • Locked: The record is locked. • Closed: The record is closed.

Common Buttons/Icons

Provides information about all the common buttons/icons used in the application.

Button/Icon	Description
New	Creates a new record for the selected screen.
Query	View all the configured records for the selected screen.
Unlock	Unlock the configured record for the selected screen.
Search	Search the configured record and select the required record for the selected screen.
Copy	Copy the configured record, modify the details and save with a different name for the record.
Delete	Remove the configured record for the selected screen.

Button/Icon	Description
Close	Closes the configured record for the selected screen.
Print	Print view the configured record for the selected screen.
Authorize	Authorize the configured record for the selected screen.
Audit	Check the history of the configured records for the selected screen.
Save	Save the configured record for the selected screen.
Cancel	Discard the configured record before saving it.
+	Add a row in the grid to provide the required record for the selected screen.
-	Remove a row in the grid for the selected screen.
>	Select a record and move it to the required selected list grid.
>	Select a record and move it back to the available list grid.
|<	Move all the available list of records to the selected list of grid.
>|	Move back all the selected list of records to the available list of grid.

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Reference and Feedback

References

For more information on any related features, you can refer to the following documents:

- Security Management System User Guide
- Common Core User Guide

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For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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