

Alerts and Dashboard User Guide

Oracle Flexcube Universal Banking

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Alerts and Dashboard User Guide

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Contents

- 1 Preface 1
 - 1.1 Introduction..... 1
 - 1.2 Audience 1
 - 1.3 Document Accessibility 1
 - 1.4 Acronyms and Abbreviations 1
 - 1.5 List of Chapters 1
 - 1.6 Related Documents..... 2
- 2 Dashboards 3
 - 2.1 Introduction..... 3
 - 2.2 My Applications 5
 - 2.3 Conversion Analysis..... 6
 - 2.4 New Savings Account 7
 - 2.5 New Current Account Opening Trend 8
 - 2.6 New Loan Account Opening Trend..... 9
 - 2.7 Stage Wise Loan Details..... 10
 - 2.8 Loan Offer Status 11
 - 2.9 Loan Exposure to Collateral..... 12
- 3 List Of Glossary..... 13

1 Preface

1.1 Introduction

Welcome to the Oracle Banking Retail Process Management Savings Account Origination User Guide. This document provides an overview on the Dashboard widgets available in RPM and guides you through the various features in Dashboards. This document helps you conveniently make use of Dashboards.

1.2 Audience

The user guide is intended for the Relationship Managers (RMs) and Sales Officers in-charge of sourcing the Bank Products from Prospect and Customer of the Bank. The user guide is also intended for the other Bank personas such as Account Opening Officer, Account Opening Supervisor, Loan Officer and Credit Manager handling the specific stages of the Savings Account, Current Account and Loan lifecycle.

1.3 Document Accessibility

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

1.4 Acronyms and Abbreviations

Following are some of the acronyms and abbreviations you are likely to find in the manual:

Abbreviation	Description
RPM	Retail Process Management
DS	Data Segment
System	Retail Process Management module

1.5 List of Chapters

Chapter	Description
Chapter 2	Alerts and Dashboard process flow is updated in this chapter.

Chapter 3	The defined stages through which the Savings Account Application has to flow before it is ready to be sent to the Host for Account Creation is detailed in this chapter.
Chapter 4	List of Glossary has the list of Functional Activity Codes of the Savings Account Stages.

1.6 Related Documents

- Retail Process Management Operations User Guide
- Retail Process Management Savings Account Origination User Guide
- Retail Process Management Current Account Origination User Guide
- Retail Process Management Term Deposit Account Origination User Guide
- Retail Process Management Retail Loans Origination User Guide
- Common Core User Guide

2 Dashboards

2.1 Introduction


Oracle Flexcube Universal Banking Retail Process Management (RPM) is the middle office banking solution with a comprehensive coverage of Retail Banking Origination processes for Savings Account, Current Account and Loans comprising of Home Loan, Personal Loan, Education Loan and Vehicle Loan. It is a Host-Agnostic solution and comes pre-integrated with Flexcube Universal Banking Solution.

It enables Banks to deliver improved user experience for various Bank personas such as Sales Officers, Relationship Manager, Account Opening Officers, Branch Supervisor/Managers, Loan Officers, and Credit Officers and so on; handling defined functions in the lifecycle of the various product origination.

RPM supports the various Dashboards to aid in enhancing the productivity and operational efficiency by providing a quick insight into various pertinent areas. The idea of these Dashboards is to ease the trouble of looking for data or statistics in the system.

Each dashboard has a unique Functional Activity Code; please refer Section 3.1 Functional Activity Code List. The access of the Dashboard is provided to the individual user either by assigning the specific Functional Activity Code to the Role that they belong to or can also be provided by assigning the dashboard Functional Activity Code directly to their User ID. Please refer the RPM – Configuration User Manual for more details.

By default all the dashboard that has been assigned for the User or User Role are displayed in the Dashboard. User can define their personal dashboard preferences by:

1. Removing any dashboard tile that they do not want to see by clicking on 'X' icon available on the top right side of the Dashboard Tile/Widget.
2. They can add a Dashboard Tile by clicking on the '+' icon on the top right side of the Dashboard screen called 'Add Tile to the Dashboard'. System will display all the Dashboard that are allowed for the User for selection.
3. They can move the Dashboard Tile to their preferred position in the Dashboard screen through drag and drop.
4. Certain Dashboard Tiles can be expanded or minimized, for which User has to click on the '' icon available in the bottom right side panel of the Dashboard Tile.

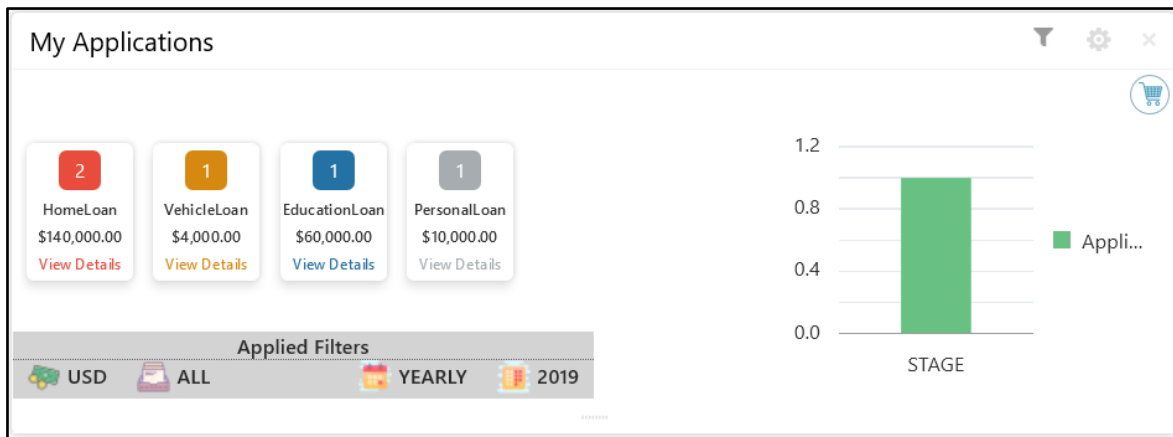
The list of dashboards currently supported are mentioned below:

- Section 2.2 – My Application
- Section 2.3 – Conversion Analysis
- Section 2.4 – New Savings Account Opening Trend
- Section 2.5 – New Current Account Opening Trend
- Section 2.6 – New Loan Account Opening Trend
- Section 2.7 – Stage-wise Loan Details
- Section 2.8 – Loan Offer Status
- Section 2.9 – Loan Exposure to Collateral

2.2 My Applications

My Application dashboard allows the logged-in Bank User, who could be a Relationship Manager, Sales Manager, Loan Officer and so on, to view the details of the total number of Products sourced in the Applications originated by them.

Figure 1: My Applications

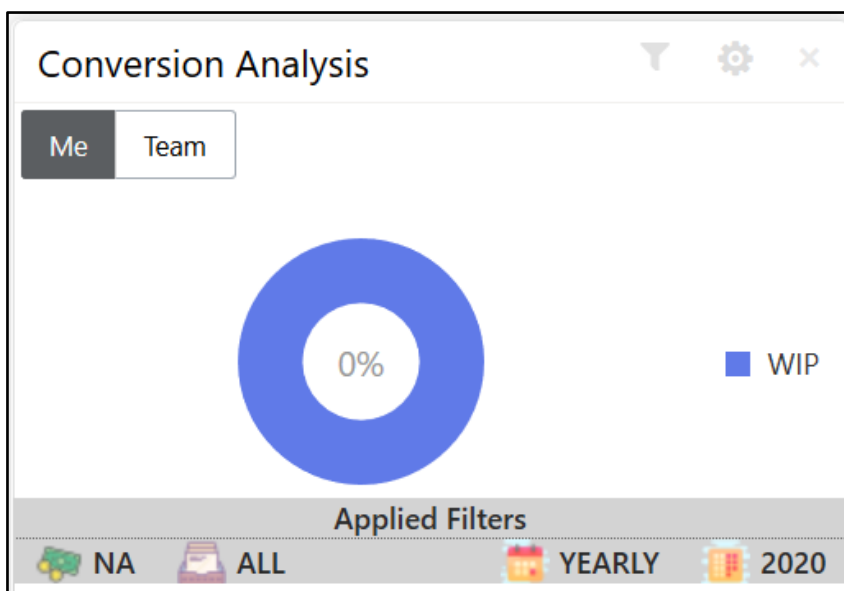


It further allows graphical view of the stages in which those Product Account Opening processes are. Various filter options such as Currency, Products and Period are available to filter the data. You can click on 'View Details' to see the list of the Account Opening Processes for the selected Product.

2.3 Conversion Analysis

Conversion Analysis Dashboard allows the logged-in Bank User to view the details of the conversion for the various products originated by them.

Figure 2: Conversion Analysis Dashboard

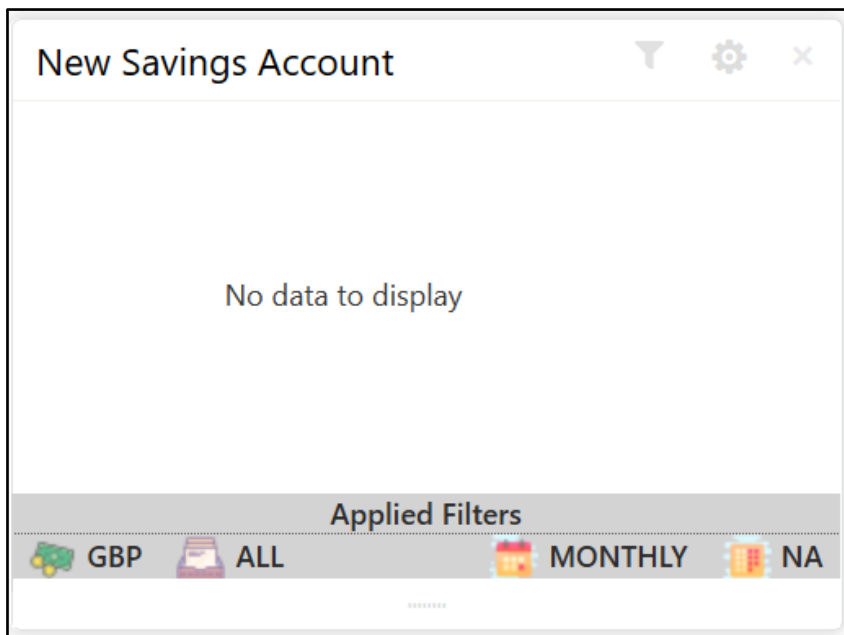


By default system displays Month-wise conversion details of All the Products originated for the current Month. Various filter options such as Products and Period are available to filter the data. The dashboard provides bifurcations across Work-In-Progress (WIP), Completed, Customer Reject and Bank Reject for the products originated.

2.4 New Savings Account

New Savings Account Dashboard allows the logged-in Bank User to view the trend of the Savings Account Opened for the specified period.

Figure 3: New Savings Account Dashboard

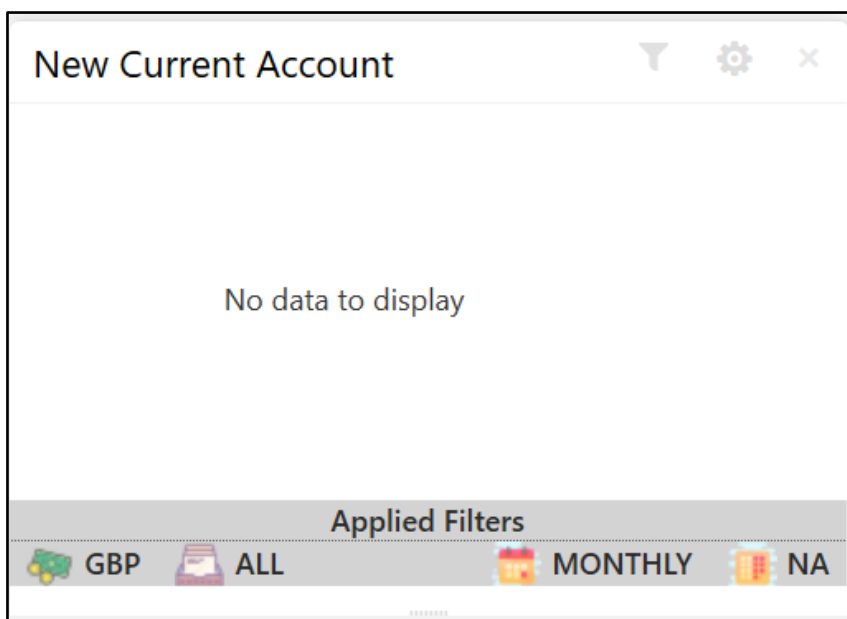


By default system displays Month-wise trend of the Savings Account Opened. Various filter options such as Currency and Period are available to filter the data. System allows to expand the dashboard tile by clicking on '📈' icon.

2.5 New Current Account Opening Trend

New Current Account Dashboard allows the logged-in Bank User to view the trend of the Current Account Opened for the specified period.

Figure 4: New Current Account Dashboard

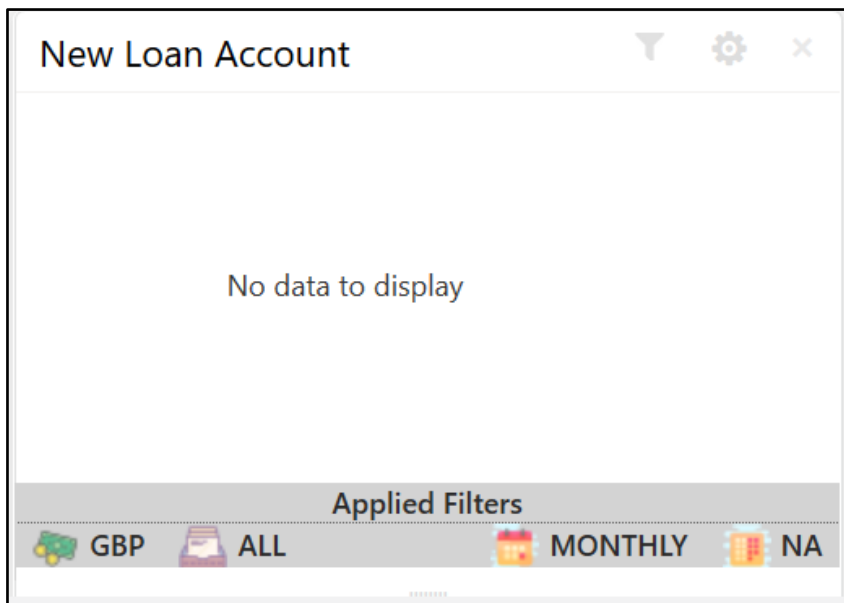



By default system displays Month-wise trend of the Current Account Opened. Various filter options such as Currency and Period are available to filter the data. System allows to expand the dashboard tile by clicking on '↗' icon.

2.6 New Loan Account Opening Trend

New Loan Account Dashboard allows the logged-in Bank User to view the trend of the Loan Account Opened for the specified period.

Figure 5: New Loan Account Dashboard

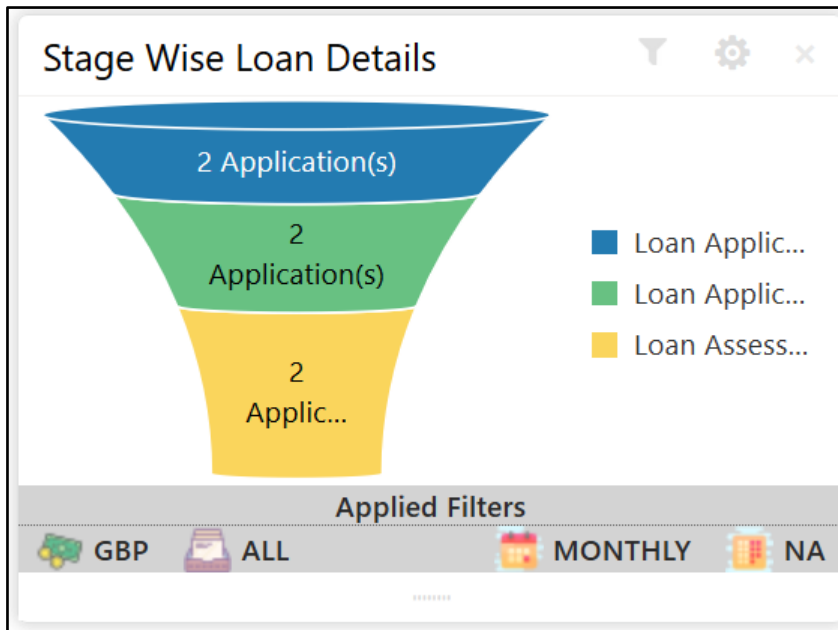


By default system displays Month-wise trend of the Loan Account Opened. Various filter options such as Currency and Period are available to filter the data. System allows to expand the dashboard tile by clicking on  Icon.

2.7 Stage Wise Loan Details

This Dashboard allows the logged-in Bank User who could be a Loan Officer or a Loan Head to view the Stage-wise details of the Loans for their Branch.

Figure 6: Stage Wise Loan Details

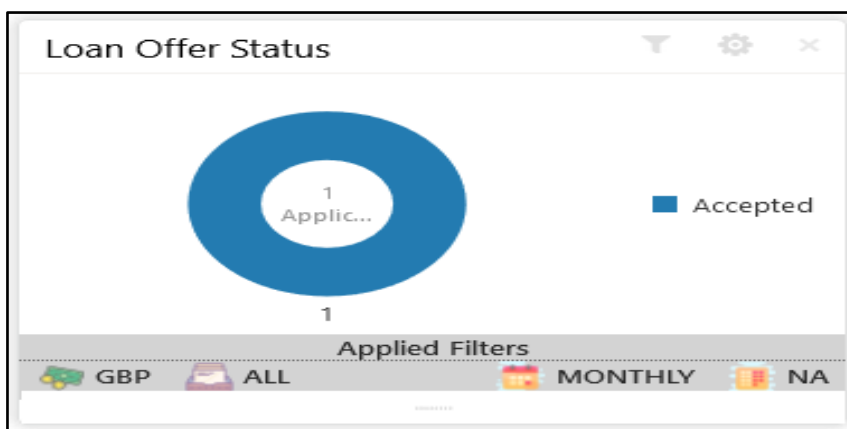


By default, System displays the stage-wise details of the Loans of the logged-in User for the Current Month. Various filter options such as Currency, Sub-Products and Period are available to filter the data.

2.8 Loan Offer Status

This Dashboard allows the logged-in Bank User who could be a Loan Officer or a Loan Head to view the status of the Loans for which offers have been made for their Branch.

Figure 7: Loan Offer Status Dashboard



In a doughnut chart the dashboard reveals the numbers and value of the Loan offers made which are in below status:

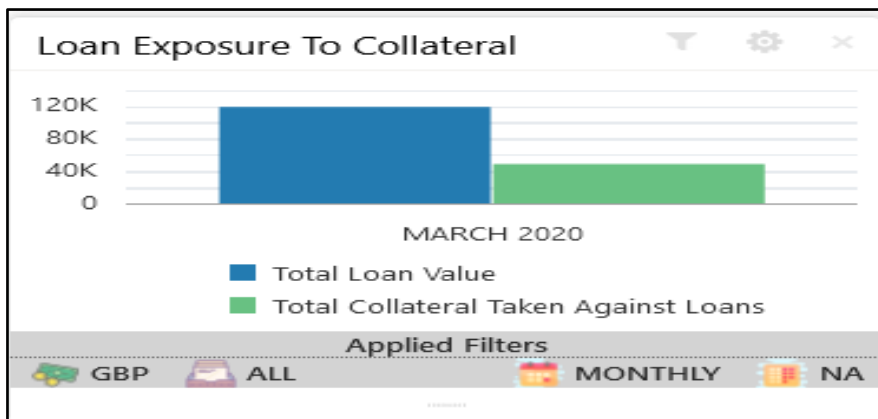
- Pending for Acceptance
- Offers Rejected by the Customer
- Offers Rejected by Bank
- Offers Accepted by Customer

By default, System displays the status for the current month, logged-in Branch and the Base Currency of the Branch. Various filter options such as Currency and Period are available to filter the data.

2.9 Loan Exposure to Collateral

This Dashboard allows the logged-in Bank User who could be a Lending Head to view the collaterals available against the Loans status for their Branch.

Figure 8: Loan Exposure to Collateral Dashboard



This dashboard shows the Loan Exposure (Value) against the Collateral Value. By default, System displays the status for the current month, logged-in Branch and the Base Currency of the Branch. Various filter options such as Currency, Sub-Products and Period are available to filter the data.

3 List Of Glossary

Dashboard Name	Functional Activity Code
My Team Application	RPM_FA_PROCESS_DRIVER_Dashboard_ALL_APPLICATIONS
My Application	RPM_FA_DASHBOARD_MY_APPLICATIONS / RPM_FA_PROCESS_DRIVER_Dashboard_MY_APPLICATION
Loan Offer Status	RPM_FA_PROCESS_DRIVER_Dashboard_LOAN_OFFER_STATUS
Conversion Analysis	RPM_FA_PROCESS_DRIVER_Dashboard_CONVERSION_ANALYSIS
Stage-wise Loan Applications	RPM_FA_PROCESS_DRIVER_Dashboard_PARKEDLOAN
Exposure to Collateral	RPM_FA_PROCESS_DRIVER_Dashboard_COLLATERAL
Account Opening Trends	RPM_FA_PROCESS_DRIVER_Dashboard_ACCOUNT_OPENING_TREND