### Oracle® Banking Enterprise Default Management

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# Preface

This guide describes how to administer the Oracle Banking Enterprise Default Management application environment.

Oracle recommends that you review its contents before installing, or working with the product.

This preface contains the following topics:

- Audience
- Documentation Accessibility
- Organization of the Guide
- Related Documents
- Conventions

### Audience

This guide is intended for the administrators of Oracle Banking Enterprise Default Management.

## **Documentation Accessibility**

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

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## Organization of the Guide

This document contains:

Chapter 1 Users Administration

This chapter describes all user management related activities to be performed by an administrator.

#### Chapter 2 Approvals Management

This chapter describes the SOA Composer rules setup, worklist authorization, and BPM Routing rules setup related activities to be performed as an administrator.

Chapter 3 Setting Up The Bank And Branch

This chapter provides the process of setting up the bank and the branch commonly referred to as the Day 0 setups.

Chapter 4 Application Monitoring Using Administration Application

This chapter provides an overview on the various monitoring operations performed as an administrator using the application.

Chapter 5 Transparent Data Encryption (TDE)

This chapter describes the configuration, installation, and policy setup of Transparent Data Encryption (TDE).

Chapter 6 Masking Customer Private Data

This chapter describes the configuration, installation, and policy setup to mask customer private data categories as sensitive or Personally Identifiable Information (PII).

Chapter 7 Configure ODI for Inbound Document Upload

This chapter provides the steps to configure ODI for uploading inbound documents.

Chapter 8 Additional Recommendations

This chapter provides specific recommendations to be considered for implementation.

# **Related Documents**

For more information, see the following documentation:

- For installation and configuration information, see the Oracle Banking Enterprise Default Management Installation Guide Silent Installation.
- For a comprehensive overview of security, see the Oracle Banking Enterprise Default Management Security Guide.
- For the complete list of Oracle Banking licensed products and the third-party licenses included with the license, see the Oracle Banking Enterprise Default Management Licensing Guide.
- For information related to customization and extension, see the Oracle Banking Enterprise Default Management Extensibility Guides for Host, SOA, and UI.
- For information on the functionality and features, see the Oracle Banking Enterprise Default Management Functional Overview document.

# Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# **1 Users Administration**

This chapter describes all user management related activities to be performed by an administrator for the application.

# 1.1 Creating Users in Oracle Identity Manager (OIM)

This section explains the procedure to create users in Oracle Identity Manager (OIM).

#### To create users in OIM:

1. Log in to OIM with the User ID as **xelsysadm** and the relevant <Password>.

Figure 1–1 Creating Users in OIM - Log in

ORACLE <sup>* Identit</sup>	y Self Service	3	Accessibility	Help	About	Oracle		
		Sign in with your account User ID xelsysadm Password Sign In Forgot User Login? Forgot Password? New User Registration Track My Registration						
Copyright @ 2001, 2015, Oracle and/or its at	filiates. Al rights reser	ved						

2. Click **Users** under the Manage section.

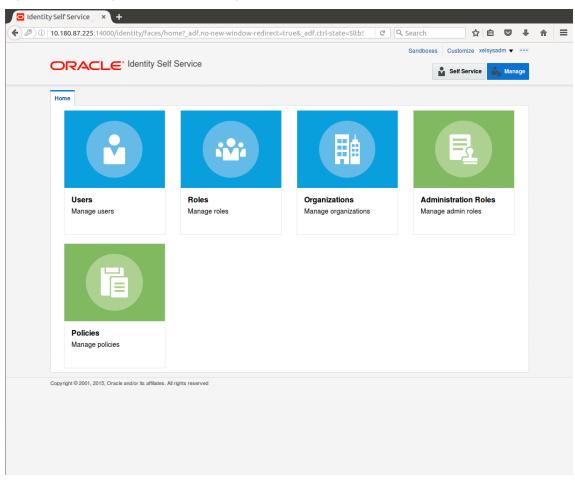


Figure 1–2 Creating Users in OIM - Manage Section

- 3. In the Search Users page, search for existing users. The Search Results appear.
- 4. Click Create in the Search Results section to create a new user.

0.180	0.87.225:14000/ic	lentity/faces/hom	ie?_adf.no-new-	window-redirec	t=true&_adf.ctrl-	state=ry1k 💙 🛛 C	Q, Search	☆	ê 🛡
							Sandboxes	s Customize xel	sysadm 🔻
	RACLE	<ul> <li>Identity Self S</li> </ul>	Service					Self Service	📩 Mana
Home	Users ×								C
🔒 L	Jsers								
		_	0.14						
Searc	bisplay Name	<u> </u>	Q Ad	vanced					
Actio	ons 🔻 View 🔻	+ Create / Op	en 🗘 Refresh	🖙 📄 Det	ach				
	User Login	Display Name	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account
	HARRY	Harry Potter	Harry	Potter	Xellerate Users		Harry@gmail.com	Active	Unlocked
	OIMINTERNAL	Internal User	OIMINTERNAL	OIMINTERNAL	Xellerate Users			Active	Unlocked
			WEBLOGIC	WEBLOGIC	Xellerate Users			Active	Unlocked
	WEBLOGIC	Weblogic User	WEDEOCIO						
opyrigh	XELSYSADM	Weblogic User System Adminis e and/or its affiliates. All ri	System	Administrator	Xellerate Users		donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotrepiy@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked
opyrigh	XELSYSADM	System Adminis	System				donotreply@ora	Active	Unlocked

Figure 1–3 Creating Users in OIM - Click Create

5. In the Create User page, enter the required user details.

tity Self Service ×	+						
10.180.87.225:1400	0/identity/faces/home?_adf.no-new-window-	redirect=true&_adf.cti	l-state=ry1k	C Search	☆自	9	Ξ
				Sandboxes Custo	mize xelsysadm	•	
ORACL	E* Identity Self Service			Self S	Service 🔓 N	lanage	
Home Users x C	reate User 🗙						
Create User				Submit Save	eAs ▼ Ca	ncel	
A Request Info	ormation						
Effective Date	Ŭ						
Justification							
Basic Informat	ion						
First Name Cla	ırk	Manager			0		
Middle Name		* Organization	Xellerate Users		0		
* Last Name Ker	nt	* User Type	Other	•			
E-mail		Display Name					
Account Settin	ngs						
User Login							
Password * Confirm Password		0					
Account Effect							
Start Date	ive Dates						
End Date	tio						
Provisionina D	Dates						

Figure 1–4 Creating Users in OIM - Enter User Details

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* Confirm Password					
Account Effective Date	15				
Start Date	Ú.				
End Date	D				
Provisioning Dates					
Provisioning Date	Ťœ				
Deprovisioning Date	Ť.				
Contact Information					
Telephone Number		Postal Address			
Home Phone		Postal Code			
Fax		PO Box			
Mobile		State			
Pager		Street			
Home Postal Address		Country			
▲ Preferences					
Locale	•				
Timezone	-				
A Other Attributes					
Common Name		Locality Name			
Department Number		Initials			
Employee Number		Title			
Generation Qualifier					
Hire Date	te				

Figure 1–5 Enter User Details (Continued)

6. Click Submit.

On completion of this procedure the user gets created in OIM, and gets synced in OID.

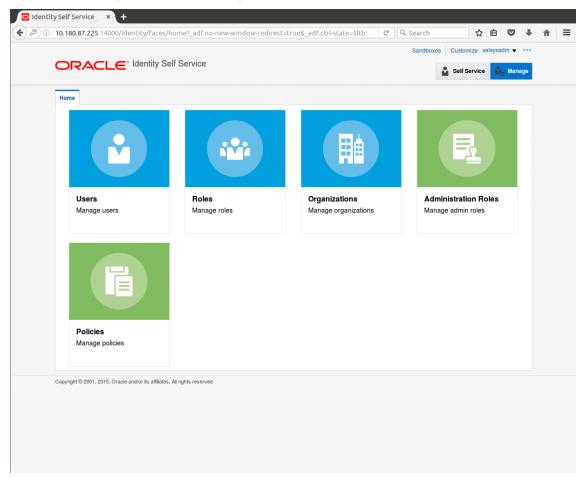
## **1.2 Creating Roles in Oracle Identity Manager (OIM)**

This section explains the procedure to create roles in Oracle Identity Manager (OIM).

To create roles in OIM:

1. Click **Roles** under the Manage section.

Figure 1–6 Creating Roles in OIM - Manage Section



- 2. In the Search Roles page, search for existing roles. The Search Results appear.
- 3. Click **Create** in the Search Results section to create a new Role.

Search Name  Cations View Create Open Delete C Refresh F Delach  Name Role Description  Advanced  Name Role Description  Advanced  Search Sea	Name     Advanced       Attraced     Advanced       Attraced     Advanced       Name     Acreate     Open       Name     Role Description       Administrators     Delault role for all users       Administrators     Administrators role for SOA       Administrators     Administrators role for BI Publisher Reports       Administrators     Operator role       SELF OPER     Operator role for self registration	
Actions View V       + Create Open X Delete () Refresh F       F       Detach         Name       Role Description         Administrators       Default role for all users         Administrators       Administrators role for SOA         BIReportAd       Administrators role for BI Publisher Reports         OPERATORS       Operator role         SELF OPER       Operator role for self registration         SYSTEM AD       System Administrator role for OIM	Actions       View       + Create       Open       Delate () Refresh       Implement       Implement         Name       Role Description       Implement       Implement <td< th=""><th></th></td<>	
Name     Role Description       Image: ALL USERS     Defauit role for all users       Image: Administrators     Administrators role for SOA       Image: Administrators     Administrators role for SOA       Image: Administrators     Operator role       Image: System AD     System Administrator role for OIM	Name         Role Description           Image: ALL USERS         Default role for all users           Image: Administrators         Administrators role for SOA           Image: Administrators         Administrators role for BI Publisher Reports           Image: ADPERATORS         Operator role           Image: SELF_OPER         Operator role for self registration	
ALL USERS Default role for all users     Administrators role for SOA     Administrators role for BI Publisher Reports     OPERATORS Operator role     SELF OPER Operator role for self registration     SYSTEM AD System Administrator role for OIM	ALL USERS     Default role for all users       Administrators     Administrators role for SOA       BIReportAd     Administrators role for BI Publisher Reports       Coperator role     SELF OPER       Operator role for self registration	
Administrators Administrators role for SOA     Administrators role for BI Publisher Reports     OPERATORS Operator role     SELF OPER Operator role for self registration     SYSTEM AD System Administrator role for OIM	Administrators Administrators role for SOA     Administrators role for BI Publisher Reports     Administrators role for BI Publisher Reports     Administrators role     SELF OPER Operator role	
Image: BiReportAd       Administrators role for BI Publisher Reports         Image: OPERATORS       Operator role         Image: SELF OPER       Operator role for self registration         Image: SYSTEM AD       System Administrator role for OIM	Image: BiReportAd       Administrators role for BI Publisher Reports         Image: OPERATORS       Operator role         Image: SELF OPER       Operator role for self registration	
OPERATORS Operator role     SELF OPER Operator role for self registration     SYSTEM AD System Administrator role for OIM	iii: OPERATORS         Operator role           iii: SELF OPER         Operator role for self registration	
Self OPER Operator role for self registration System Administrator role for OIM	SELF OPER Operator role for self registration	
SYSTEM AD System Administrator role for OIM		
ypyright © 2001, 2015, Oracle and/or its affiliates. All rights reserved	SYSTEM AD System Administrator role for OIM	

Figure 1–7 Creating Roles in OIM - Click Create

4. Fill the role details.

10.180.87.225:14000/identity/	faces/home?_adf.n	io-new-window-redire	cc=true&_adr.ctrl-s	state=5ltb! ~ C	. Search	☆ 自 ♥
					Sandboxes Cus	stomize xelsysadm 🔻
	ty Self Service				Se	elf Service 🏼 🎝 Mana
Home Roles x Create Role x	]					[
Create Role						
This wizard walks you through the s	teps to create a Role.		-		-	
Back Attributes	Hierarchy	Access Policy	Members	Organizations	Summary	Cancel Next
* Display Name	TestFullAccess					
* Display Name Role E-mail Role Description	TestFullAccess					
Role E-mail Role Description * Owned By						
Role E-mail Role Description	TestFullAccess	Q				
Role E-mail Role Description * Owned By	TestFullAccess System Administrator					
Role E-mail Role Description * Owned By A Catalog Attributes	TestFullAccess System Administrator Role					
Role E-mail Role Description * Owned By A Catalog Attributes * Category	TestFullAccess System Administrator					

Figure 1–8 Creating Roles in OIM - Enter Role Details

5. Click **Finish.** The role is created successfully.

This role creates a group in OID.

While running the PIT (Policy Import tool), the Enterprise role (OIM role or OID group in this scenario) is mapped to the Application Role in OES.

					Sandboxes Cus	stomize xelsysadm 🔻 🗉
	ty Self Service				Se	elf Service 🎝 Manag
Home Roles x Create Role x						
Create Role This wizard walks you through the s	topa to graata a Rala					
Attributes	Hierarchy	Access Policy	Members	Organizations	Summary	Cancel Finish
Role Definition Summar Review the information entered so Attributes		create the role.				
Display Name	TestFullAccess					
Role E-mail						
	TestFullAccess					
Role Description						
Owned Ry	System Administrator					
Catalog Attributes	Gystern Administrator					
▶ Hierarchy						
Access Policy						
Members						
Organizations						

Figure 1–9 Creating Roles in OIM - Role Created Successfully

## **1.3 Assigning Roles to Users in OIM**

This section explains how to assign roles to the user in OIM.

To assign a role to a user:

- 1. Log in to OIM.
- 2. Navigate to the Roles Tab under the User.
- 3. Click Request Roles.

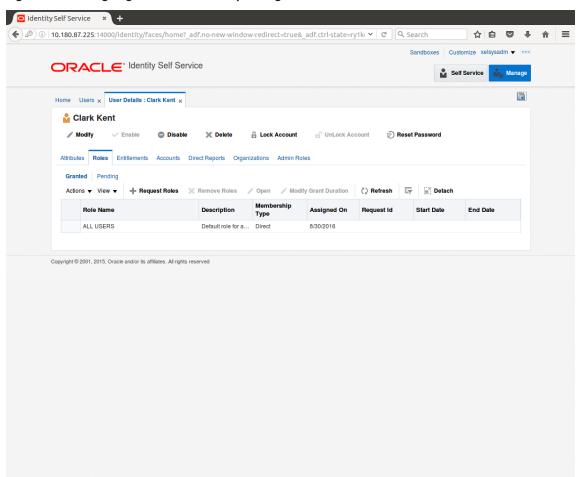


Figure 1–10 Assigning Roles in OIM - Requesting Roles

4. In the Catalog page, select the required role and click Add to Cart. The item gets added to the cart.

Home Users 🗙 User Details : Clark Kent	× Role Access Request ×			[
Back		Checkout Cancel	lext	Cart 🛒 Clark Kent 💦
Search Categories Sort By Display Nar	ne 🗸	- Ad	d Selected to Cart	
Categories Sort By Display Nar	ccess		d Selected to Cart	
Role (1)				
Copyright © 2001, 2015, Oracle and/or its affiliates. All	rights reserved			

Figure 1–11 Assigning Roles in OIM - Adding to Cart

5. Click Checkout.

Home Users x User D	etails : Clark Kent 🗙	Role Access Request ×						(
	Back	Add Access	Checkout	Cancel Nex	t		<b>Car</b> l Clark Kent	<b>}</b> ₽
Search and select indivi	dual items from the Ca	atalog tab. Sets of pre-bur	ndled items commo	only used in your organiza	tion can be select	ed from the Requ	uest Profiles	tab.
Catalog Request Pro	lles							
Search Keyword								
	Search							
Categories Sor	t By Display Name	ŀ		- Add S	elected to Cart			
Select All	TestFullAcces			0	🕂 In Cart			
🔀 Role (1)	TestruinAccess	•						
Copyright © 2001, 2015, Oracle a	nd/or its affiliates. All rights	reserved						

Figure 1–12 Assigning Roles in OIM - Checkout Cart

6. In the Cart Details page, click Submit.

	00/identity/faces/hom	er_outito new-v			=ry1kı CQ	Search Sandboxes Custon	hize xelsysadm ▼	+ 1
ORACL	C Identity Self S	ervice				Self S	ervice 🎎 Man	ige
Home Users x	User Details : Clark Kent 🗙	Role Access Req	uest ×				ĺ	
	Back	Add Access	Checkout	Cancel	Next		Clark Kent 🎦	
Cart Details						Submit	Save As ▼	
⊿ Request I	nformation							
Justification								
✓ Cart Items								
Display Name	estFullAccess						X 0	
	astFullAccess						ΧU	
Request Detai	Is TestFullAccess						Update	
Grant I	Duration							
	Grant will be effective	immediately upon r	request completion					
	Start Date	Ċ	End Date		5			

Figure 1–13 Assigning Roles in OIM - Submit Cart

On completion of this procedure the role gets assigned to the user in OIM.

### 1.4 Locking Users in OIM

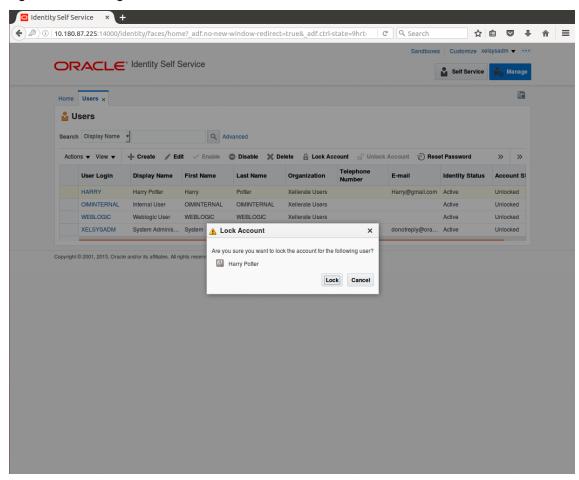
This section explains how to lock the user in OIM.

#### To lock a user:

- 1. Log in to OIM.
- 2. Click Lock Account to lock a user.

A message appears, Are you sure you want to lock the account for the following user?

3. Click Lock.



#### Figure 1–14 Locking Users in OIM

The user is locked successfully.

		Identity Self S	Service				Sandboxe		
	locked succes							Self Service	📩 Mana
Home Use	rs ×								(
🔓 Users	8								
Search Dis	play Name	•	Q Ad	lvanced					
		4							
Actions 🔻	r Login	Create  Ed Display Name	it 🗸 Enable First Name	Disable X D Last Name	Organization	Count Count	E-mail	et Password	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
						Number			
HAR	INTERNAL	Harry Potter Internal User	Harry	Potter	Xellerate Users Xellerate Users		Harry@gmail.com	Active	Locked Unlocked
	BLOGIC	Weblogic User	WEBLOGIC	WEBLOGIC	Xellerate Users			Active	Unlocked
	SYSADM	System Adminis		Administrator	Xellerate Users		donotreply@ora		Unlocked
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opyright © 2001	I, 2015, Oracle	and/or its affiliates. All ri	phis reserved						

Figure 1–15 User Locked Successfully

# 1.5 Unlocking Users in OIM

This section explains how to unlock the user in OIM.

#### To unlock a user:

- 1. Log in to OIM.
- 2. Click Unlock Account to unlock a user.

A message appears, Are you sure you want to Unlock these users?

3. Click Unlock.

		<ul> <li>Identity Self S</li> </ul>	Service				Sandboxes	s Customize xel	sysaum 🗸 🛛
	ccount unlocked suc							Self Service	📩 Manag
Home	Users ×								
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Actio	ons 🔻 View 🔻	+ Create 📝 Ed	it 🗸 Enable	Disable X D	elete 🔒 Lock Ad	ccount 👩 Unio	ck Account 💮 Res	et Password	» »
	User Login	Display Name	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account S
	HARRY	Harry Potter	Harry	Potter	Xellerate Users		Harry@gmail.com	Active	Unlocked
	OIMINTERNAL	Internal User	OIMINTERNAL	OIMINTERNAL	Xellerate Users			Active	Unlocked
	WEBLOGIC	Weblogic User	WEBLOGIC	WEBLOGIC	Xellerate Users			Active	Unlocked
	XELSYSADM	System Adminis	System	Administrator	Xellerate Users		donotreply@ora	Active	Unlocked
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Copyright	© 2001, 2015, Oracle	andor its affiliates. Al ri	ghts reserved						

Figure 1–16 Unlocking Users in OIM

The user is unlocked successfully.

## 1.6 Resetting User Password in OIM

This section explains how to reset user password in OIM.

- 1. Log in to OIM.
- 2. Click **Reset Password** to reset a user password.

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	User Login	Display Name	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account	t SI
	HARRY	Harry Potter	Harry	Potter	Xellerate Users		Harry@gmail.com	Active	Unlocked	i
	OIMINTERNAL	Internal User	OIMINTERNAL	OIMINTERNAL	Xellerate Users			Active	Unlocked	ł
					Vellerate Lleare			Active	Unlocked	
	WEBLOGIC	Weblogic User	WEBLOGIC	WEBLOGIC	Xellerate Users					ł
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Figure 1–17 Resetting User Password in OIM

The **Reset Password** dialog box appears.

You can select either **Manually change the Password** option to change the password manually or select the **Auto-generate the password (Randomly generated)** option to enable auto generation of the password.

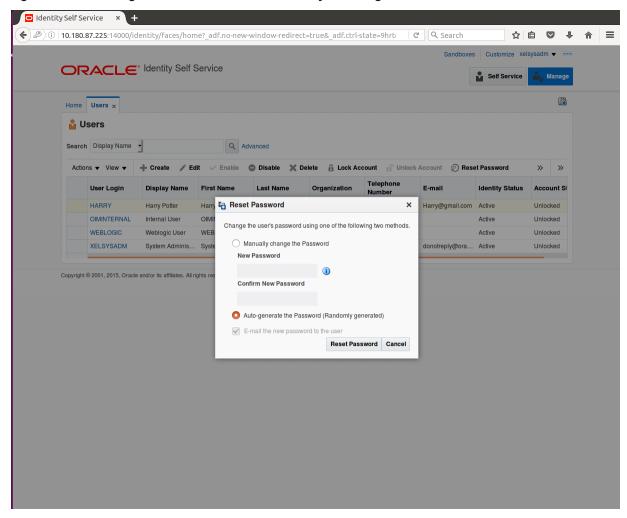


Figure 1–18 Resetting User Password in OIM - Manually or Auto-generate

3. If you select the **Manually change the Password** option, enter the new password in the **New Password** and the **Confirm New Password** fields.

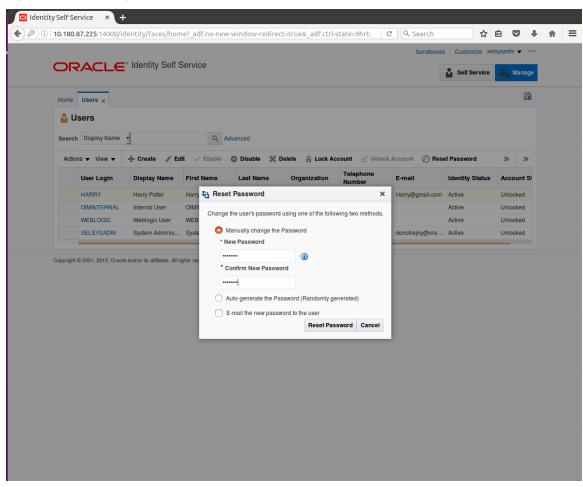
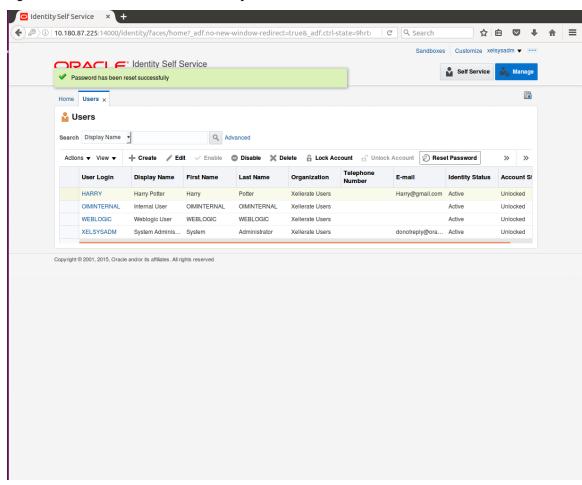


Figure 1–19 Resetting User Password in OIM - New Password

The user password is reset successfully.





## **1.7 User Management Using the Admin Application**

The User Management screen is a quick start UI, provided to create initial users and verify the OBEDM installation.

https://<ui-server-name>:<ui-server-port>/com.ofss.fc.ui.view.admin/faces/admin.jspx

To create initial users and verify the installation, perform the below mentioned steps:

- 1. Click Security tab in View Admin.
- 2. Select User Management.
- 3. Click + icon to add a user.

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		f Language				Edit	Apply cl	nanges	Assig	n Rol
Username						Edit	Apply cf	nanges	Assig	n Rol
Username First Name	Ad	ccrediation				Edit	Apply cl	nanges	Assig	n Ro
Username First Name Last Name	Ac :	Brand				Edit	Apply cl	nanges	Assig	n Ro
Username First Name Last Name Email	Ac :	Brand 2FA Status				Edit	Apply cl	nanges	Assig	n Rol
First Name Last Name Email Password	Ac :	Excrediation Brand 2FA Status Nick Name Party Id				Edit	Apply cl	nanges	Assig	n Rol

#### Figure 1–21 Adding a User

4. Enter the mandatory fields required for creating a user.

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sername Targ	get Unit Branc	h Delete				
User Details Forr	n				Edit Apply change	es Assign R
User Details Forr		Preferred L	anouaoe		Edit Apply change	es Assign R
	Harry	Preferred L	anguage		Edit Apply change	es Assign R
• Username	Harry Harry				Edit Apply change	es Assign R
Username     First Name	Harry Harry Potter	Acc	rediation		Edit Apply change	Assign R
Username     First Name     Last Name	Harry Harry Potter Harry@gmail.com	Acc	Brand FA Status		Edit Apply change	Assign R
Username     First Name     Last Name     Email	Harry Harry Potter Harry@gmail.com	Acc 2F	Brand FA Status		Edit Apply change	is Assign R
Username     First Name     Last Name     Email     Password	Harry Harry Potter Harry@gmall.com	Acc 2F	A Status Party Id		Edit Apply change	Assign R
First Name     Last Name     Email     Password     Confirm password	Harry Harry Potter Harry@gmail.com	Acc 2f Forum Ni	A Status Party Id ate Time		Edit Apply change	Assign R

#### Figure 1–22 Enter Mandatory Details

5. Click **Apply Changes** to save the user details locally.

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Username First Name Last Name	Harry Harry	Prefer	Accrediation	Edit Apply changes	Assigr	n Rol
Usemame First Name Last Name	Harry Harry Potter Harry@gmail.com		Accrediation Brand	Edit Apply changes	Assign	n Rol
Username First Name Last Name Email	Harry Harry Potter Harry@gmail.com 1010		Accrediation Brand 2FA Status	Edit Apply changes	Assign	n Role
Username First Name Last Name Email Home Branch Manager	Harry Harry Potter Harry@gmail.com 1010	For	Accrediation Brand 2FA Status um Nick Name	Edit Apply changes	Assign	n Role
Username First Name Last Name Email Home Branch Manager	Harry Harry Potter Harry@gmail.com 1010	Fon Last Logge 2FA Inacti	Accrediation Brand 2FA Status um Nick Name Party Id	Edit Apply changes	Assign	n Rol

# Figure 1–23 Applying Changes

6. To add a user to a group, select the row containing the user and click **Assign Roles**.

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	Username	Target Unit	Branch	Delete								
	Harry	GLBL_BU_PB	1010									
ŀ												
	User Detail	ls Form					Edit	Apply	changes	Assign	Roles	
	Username	Harry	Preferre	d Language								
	First Name	Harry		Accrediation								
	Last Name	Potter		Brand								
	Email	Harry@gmail.com		2FA Status								
	Home Branch	1010	Forum	n Nick Name								
	Manager			Party Id								
	Target Unit	GLBL_BU_PB	Last Logged i									
			2FA Inactive									
			2FA Inacti	ve End Date								
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### Figure 1–24 Adding User to a Group

The available and assigned roles appear.

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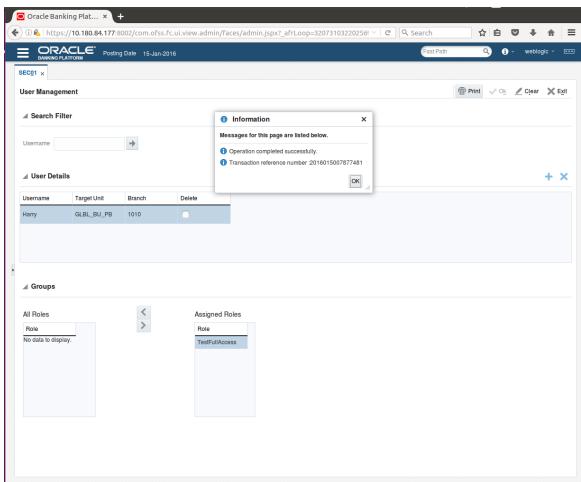
Figure 1–25 Available and Assigned Roles

7. Select the group to add user and move it to the **Assigned Roles** table.

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Harry	GLBL_BU_PB	1010									
Groups											
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Figure 1–26 Adding User to Assigned Roles Table

8. Click **Ok** to save the changes.



#### Figure 1–27 Save Changes

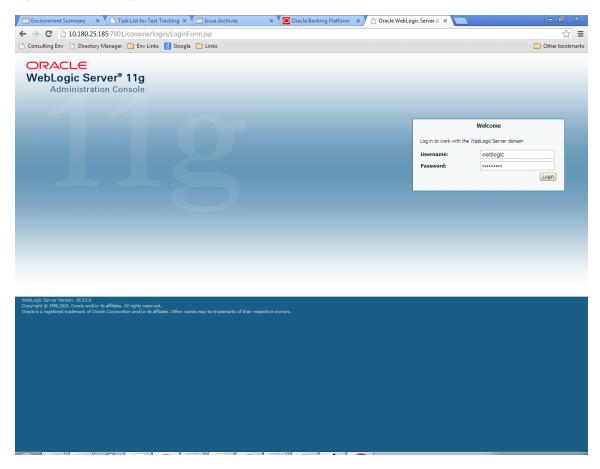
# 1.8 Unlocking Users in Oracle WebLogic Server (OWS) Administration Console

This section explains the procedure to unlock users in Oracle WebLogic Server (OWS) using Administration Console. If users unsuccessfully attempt to log in to a WebLogic Server instance for more than the configured number of retry attempts, they are locked out of further access. This procedure allows you to unlock locked users so that they can log in again.

To unlock a user in OWS:

1. Log in to OWS. The **Home Page** of OWS Administration Console appears.

# Figure 1–28 OWS Log in



2. In the Domain Structure section, click the base\_domain link.

Consulting Env 📄 Directory Manager	🗀 Env Links 💈 Google 🦳 Links		🗀 Other boo
hange Center	🗎 Home Log Out Preferences 🔤 Record Help	Q	Welcome, weblogic Connected to: base_o
iew changes and restarts	Home		
ck the Lock & Edit button to modify, add or	Home Page		
ete items in this domain.	- Information and Resources		
Lock & Edit	Helpful Tools	General Information	
Release Configuration	Configure applications	Common Administration Task Descriptions	
ain Structure	Configure GridLink for RAC Data Source	<ul> <li>Read the documentation</li> </ul>	
domain	Recent Task Status	<ul> <li>Ask a question on My Oracle Support</li> </ul>	
Invironment	<ul> <li>Set your console preferences</li> </ul>	<ul> <li>Oracle Guardian Overview</li> </ul>	
base_domain	Oracle Enterprise Manager		
Services Security Realms	- Domain Configurations		
Interoperability			
Diagnostics	Domain	Services	Interoperability
	Domain	Messaging     JMS Servers	WTC Servers     Jolt Connection Pools
	Environment	Store-and-Forward Agents	Joir Connection Pools
	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
w do I	Migratable Targets	Data Sources	Diagnostic Images
Search the configuration	Coherence Servers	Persistent Stores	Request Performance
Jse 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
fonitor servers	<ul> <li>Startup And Shutdown Classes</li> </ul>	Work Contexts	
		• jCOM	Charts and Graphs
stem Status E		Mail Sessions     FileT3	<ul> <li>Monitoring Dashboard  </li> </ul>
alth of Running Servers	Deployments	<ul> <li>File13</li> <li>JTA</li> </ul>	
Failed (0)	Your Application's Security Settings	• 314	
Critical (0)	Security Realms		
Overloaded (0)	· Security recurs		
Warning (0)			
OK (2)			

#### Figure 1–29 base\_domain

10.180.25.185:7001/console/console\_portal?\_nfpb=true&\_pageLabel=DormainConfigGeneralPage&DormainConfigGeneralPartlethandle=com.bea.console.handlesJMXHandle%28"com.bea%3AName%3Dbase\_dormain%2CType%3DDorma...

3. In the **Settings for base\_domain** page that appears, click the **Security** tab.

#### Figure 1–30 Security tab

Consulting Env Directory Manager			C Other book
ange Center	🔒 Home Log Out Preferences 🔤 Record Help	Q	Welcome, weblogic Connected to: base_dom
ew changes and restarts	Home >base_domain		
ck the Lock & Edit button to modify, add or	Settings for base_domain		
lete items in this domain.	Configuration Monitoring Control Security	V Web Service Security Notes	
Lock & Edit	General JTA JPA EJBs Web April 1		
Release Configuration	Securi	ity-Tab	
omain Structure	Click the Lock & Edit button in the Change Center	to modify the settings on this page.	
se_domain	Save		
-Deployments -Services -Security Realms -Interoperability -Diagnostics	A domain is a collection of WebLogic Server instand domain. * Indicates required fields	ces that is managed by a single Administration Serve	r. Use this page to configure administrative options that apply to all servers in the current
	* Name:	base_domain	The name of this WebLogic Server domain. More Info
	Enable Administration Port		Specifies whether the domain-wide administration port should be enabled for this WebLogic Server domain. Because the administration port uses SSL, enabling the administration port request bhat SSL must be configured for all servers in the domain. More Info
change Console preferences	Administration Port:	9002	The common secure administration port for this WebLogic Server domain. (Requires you to enable the administration port.) More Info
Configure the domain-wide administration port Archive configuration files Disable the Console	🏀 Production Mode:	true	Specifies whether all servers in this domain run in production mode. Once enabled, this can only be disabled in the admin server startup command line. More Info
estem Status	C 🚰 Enable Exalogic Optimizations		Specifies whether optimizations for Oracle Exalogic should be enabled. Optimizations include improved thread management and request processing, and reduced lock contention. This attribute should be anabled only when configuring a WebLogic domain for Oracle Exalogic. For more information, see "Enabling Exalogic-Specific Enhancements in Oracle WebLogic Server 110 Release 1 (10.3.4)" in the Oracle Exalogic Deployment Guide. More Info
Critical (0) Overloaded (0) Warning (0)	🗌 🕂 Enable Cluster Constraints		Specifies that deployments targeted to a cluster succeed only if all servers in the cluster are running. More Info
OK (2)	🗌 🚜 Enable on-demand deployment of inte	ernal applications	Specifies whether internal applications such as the console, uddi, wistestclient, and uddiexplorer are deployed on demand (first access) instead of during server startup. More Info
	🗌 街 Enable Oracle Guardian Agent		Specifies whether the Guardian Agent is deployed when starting servers in the current domain. More Info
	- Advanced		

- 4. Click the **Unlock User** tab.
- 5. In the Unlock User field, enter the User ID to unlock the user.

Environment Summary × Task	List for Test Tracking 🗙 🕅 I	sue Archives	× 🖸 Oracle	e Banking Platform	× Security - base_d	omain - ) ×
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🗋 Consulting Env 🗋 Directory Manager 🚺	🗎 Env Links 🚦 Google 📋 I	inks				🗀 Other bookmarks
	Administration Console					Q
Change Center	Home Log Out Preference	Record Help		Q		Welcome, weblogic Connected to: base_domain
View changes and restarts	Home >base_domain					
Click the Lock & Edit button to modify, add or delete items in this domain.	Settings for base_domain					
Lock & Edit	Configuration Monitoring	Control Security	Web Service Security	Notes		
Release Configuration	General Filter Unlock U	Embedded LDA	P Roles Policies			
Domain Structure	Save					
base_domain ⊕=Environment b=Deployments ⊕=Services ==Security Realms	If a user unsuccessfully atten This page allows you to unloc	-	-	re than the configure	d number of retry attempts, th	ey are locked out of further access.
Interoperability     Diagnostics	Unlock User:	HardikA			Name	of a specific user to unlock. More Info
	Save					
How do I 😑						
Unlock user accounts						
Set user lockout attributes						
System Status						
Health of Running Servers						
Failed (0)           Critical (0)           Overloaded (0)           Warning (0)           OK (2)						
WebLogic Server Version: 10.3.5.0 Copyright © 1996,2010, Oracle and/or its affiliates. All Oracle is a registered trademark of Oracle Corporation		be trademarks of their i	espective owners.			

#### Figure 1–31 Unlock User

6. Click **Save.** The message *User successfully unlocked* appears.

Environment Summary 🗙 🎦 Task	List for Test Tracking 🗙	Issue A	rchives	×	Oracle Banki	ng Platform 💙	<ul> <li>Becurity - base_dom</li> </ul>	main - \ 🗙 📃		- 0 ×
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🗋 Consulting Env 📄 Directory Manager 🕻	🛅 Env Links 🛛 🛽 Googl	e 📋 Links								📋 Other bookmarks
	Administration Conso	e								Õ
Change Center         View changes and restarts         Click the Lock & Edit button to modify, add or delete items in this domain.         Lock & Edit         Release Configuration         Domain Structure         base domain         ⊕ Environment         → Security Realms         ⊕ Interoperability         ⊕ Delognostics	Save	unlocked. main toring Contro nlock User	ol Security Embedded LDAP	gic Server insta	icies		unber of retry attempts, they Name of		ner access.	ionnected to: base_domain
How do L  Uhlock user accounts  Set user lociout attributes  System Status Health of Running Servers  Failed (0) Critical (0) Critica		imes may be trad	Hensarks of their rea	spective owners						

Figure 1–32 User Successfully Unlocked

On completion of this procedure the user gets unlocked in OWS.

# 1.9 Creation of first time user to access OBEDM

This section explains the procedure to create the first bank user having access to the application.

#### Note

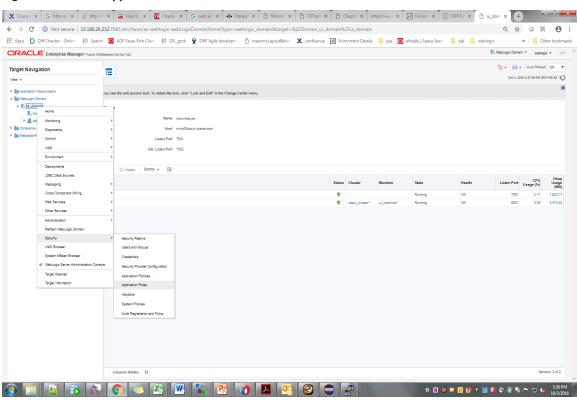
Make the default authenticator as sufficient in host console and reorder it below OID Authenticator. Also change 'cn' attribute to 'uid' in the All Users Filter and User From Name Filter in OID Authenticator provider specific properties.

- Log in to OIM using the admin user *xelsysadm*. Create a new role in OIM as described in Section 1.2 Creating Roles in Oracle Identity Manager (OIM). For example, Developer. This creates a group in OID (Developer).
- 2. Log in to admin application using the weblogic user. Create a user as described in Section 1.7 User Management Using the Admin Application. For example, john.doe.

- 3. Add the user (john.doe) to the Developer.
- 4. Map the application role Administrators to the Enterprise Group Developer in EM (refer screenshots below). After doing this, the user should have access to all artifacts assigned to the 'Administrators' role. These access rights can be viewed in OES.

Figure 1–33 Log in Oracle Fusion Middleware Control

	IN TO CLE ENTERPRISE MAN/ ION MIDDLEWARE CONT			
Domain " User Name " Password				
				ORACLE
Copyright © 1996, 2016, Oracle and/or its affiliates. All rights reserved. /	Oracle is a registered trademark of Oracle Corpo	oration and/or its affiliates. Other names may be trademarks of their respecti	ive owners.	OF



#### Figure 1–34 Click Application Roles

Figure 1–35 Select Administrators Role

DRACLE' Enter	prise Manager Fusion Middleware Control 12c		WebLogic Domain v weblogic v
ui_domain 0			
🗧 📙 WebLogic Domain	*		Oct 3, 2018 3:22:14 PM GMT+05:30
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	to by security aware approactors that are specific to the WebLogic Domain, use the Oracle WebLogic 3		
Policy Store Provider			
I Search			
lect an application and enter a	search keyword for the role name to search for role	defined by this application. Use the application stripe to search if the application uses a stripe that is different from the application name.	
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	Role Name Starts With ¥	▶	
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Role Name	Display Name	Description	
OCS_PORTAL_USERS	OCS_PORTAL_USERS	OCS_PORTAL_USERS	
OffineRole	OffineRole	OffineRole	
Individual-Broker	Individual-Broker	Individual-Broker	
Individual-Introducer	Individual-Introducer	Individual-Introducer	
Organisation-Broker	Organisation-Broker	Organisation-Broker	
Organisation-Introducer	Organisation-Introducer	Organisation-Introducer	
ATM_Role	ATM_Role	ATM_Role	
POS_Role	POS_Role	POS.Role	
QualityAdministrator	QualityAdministrator	QualityAdministrator	
Developer	Developer	Developer .	
SystemAdministrators	SystemAdministrators	SystemAdministrators	
Administrators	Administrators	Administrators	
CInCollectionAdmin	CinCollectionAdmin	CisCollectionAdmin	
CinCollectorDialer	CinCollectorDialer	CinCollectorDialer	
BusinessDirectBanker	BusinessDirectBanker	BusinessDirectBanker	
CinCollectorErLstMd	CinCollectorErLstMd	CinCollectorErLstMd	
OBPAdminReadonly	OBPAdminReadonly	OBPAdminReadonly	
Customer	Customer	Customer	
CinCollectorErPmtMd	CinCollectorErPrntMd	ClnCollectorErPrintMd	
CinCollectorRecov CinSupervisorCin	CinCollectorRecov CinSupervisorCin	CinCollectorRecov CinSupervisorCin	
CinSupervisorCin	CinSupervisorCin	UnsupervisorUm	
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4			
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# Figure 1–36 Add Principal

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Edit Application Role : A	dministrators									OK Cancel
Role (or Enterprise Role) is the group of	users designed at the enterprise level and typically used to	assign a privilege or permission. A role ca	an elso contein other roles es r	nembers.						
General										
Application Stripe	OBP									
Role Name	Administrators	Add	d Principal							
Display Name	Administrators		cify criteria to search and selec	t the application ro	es that you want to grant pe	rmissions to.				
Description	Administrators	4	Search				- 1			
		le.	Туре	Group	•					
Members An application role may need to be map	ped to users or groups defined in enterprise LDAP server, or	the role can be mapped to other a	Principal Name	Starts With V	Developer					
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# **2 Approvals Management**

This chapter describes the SOA Composer rules setup, worklist authorization, and BPM Routing rules setup related activities to be performed as an administrator.

# 2.1 SOA Composer Rules Setup

After the rules are set up using seeds, you must set up the approval rules in SOA Composer. The following procedure is performed during SOA Composer rules setup:

# 2.2 Enabling Worklist Authorization

This section explains the steps in enabling Worklist authorization. Following are the steps:

# Step 1 Identify the Service Name

There can be two services for the same service. A normal 'app' service and 'appx' service. We need to identify both the services.

For example, Add Transaction Limit will have the following two services:

- com.ofss.fc.app.sms.service.limit.TransactionLimitApplicationService.addTransactionLimit
- com.ofss.fc.appx.sms.service.limit.TransactionLimitApplicationServiceSpi.addTransactionLimit

## Step 2 Enable Dual Authorization

Once the services are identified, follow the below steps to enable Dual Authorization.

- 1. Log in to Oracle Banking Enterprise Default Management.
- 2. Navigate to Artifact Dependency Map (Fast path: SM500) page.
- 3. In the **Search Text** field, type the service-name or a part of it or enter phrase in the format TASK\_ CODE+search\_text that helps to select the service using auto suggest behavior.

For example, to search for a service for promise to pay case, search text can be as follows:

- PromiseToPay
- Hardship
- com.ofss.fc.appx.collection.service.promisetopay.PromiseToPayApplicationServiceSpi.creat
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Figure 2–2 Search for service using TASK CODE + search text

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4. Click the Approval Checks tab and add approval checks.

#### Figure 2–3 Add Approval Checks

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#### Step 3 Configure Severity

Enabling of dual authorization alone will not send the transaction for approval. Hence we need to configure Severity for the identified service, to enable the call for approval workflow.

#### This will be configured from the page Artifact Dependency Map (Fast path: SM500).

Follow the below steps to configure severity:

- 1. Log in to Oracle Banking Enterprise Default Management.
- 2. Navigate to the Artifact Dependency Map (Fast path: SM500) page.
- 3. In the **Search Text** field, type the service-name or a part of it or enter phrase in the format TASK\_ CODE+search\_text that helps to select the service using auto suggest behavior.

For example, to search for a service for promise to pay case, search text can be as follows:

- PromiseToPay
- Hardship
- com.ofss.fc.appx.collection.service.promisetopay.PromiseToPayApplicationServiceSpi.creat
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Figure 2–5 Search for service using TASK CODE + search text

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4. Ensure approval checks are added. If not, then configure the approval checks.

#### Figure 2–6 Dual Control

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5. Click the **Severity** tab and update the severity, if already maintained. Otherwise, click the **Add** button in the toolbar to add new row in table.

### Figure 2–7 Add New Severity

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6. Enter the following details in the **Severity** tab.

Branch Code	Branch code from which the transaction is to be performed. Specify ANY to configure for all branches. Example: 082991
Role ID	Security Role to which the user belongs and initiates the transaction.
Channel ID	Channels such as BRN, ATM, IB and so on, through which the transaction is performed.
Reason Code	Select Reason Code 1000 normal approval flow.
	This field contains four values as detailed below:
	<b>Ignore:</b> Allows transaction to complete without any authorization, that is Auto Authorization.
Severity	<b>Override:</b> Transaction will be sent for Authorization.
	<b>Notify:</b> In this case, the task is not sent for authorization, but the user is expected to confirm the transaction for proceeding ahead. This option is not applicable in case of Dual Authorization.
	<b>Reject:</b> System does not allow to proceed with transaction.

To enable Dual Authorization, select **Override** option.

#### Note

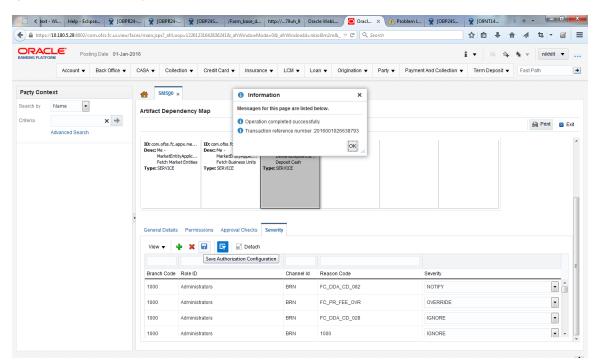
At times you may also notice that the Severity Configuration is already set up. Do not change it.

#### Figure 2–8 Add Severity Details

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7. Save newly added severity using the Save button in toolbar.

Figure 2–9 Save Severity Details





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## Step 4 Testing Approvals

Once the configurations are done, navigate to the screen for which approval is enabled.

Let us consider Scan Reject (Fast path: PC204) for example:

- 1. Log in to Oracle Banking Enterprise Default Management.
- 2. Navigate to the page Scan Reject (Fast path: PC204).
- 3. Enter the required details and click **Ok**. The message Approval is required for the transaction appears.

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Figure 2–11 Scan Reject (Fast path: PC204)

- 4. Now log in to the Oracle BPM Worklist application (BPEL Worklist) of the respective environment using the supervisor credential.
- 5. In **My Tasks**, select the work item assigned against your name.

Figure 2–12 Oracle BPM Worklist Log in

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6. Enter the same user name and password to open the work item page.

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Figure 2–13 Enter Log in Credentials

- 7. On successful submission of the Log in credentials, you can see the snapshot of the OBEDM page (Scan Reject in this case) from which the transaction occurred and was sent for approval.
- 8. Verify whether the page displays the data entered in the OBEDM application when it was sent for approval.

You can see Approve and Reject option for the work item.

Figure 2–14 My Tasks - Work Item Details

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9. Click **Approve** or **Reject** to perform the appropriate action.

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Figure 2–15 Approve or Reject Task

Once the transaction is approved, you can see the status of transaction as *Completed*. This can also be seen by selecting the option *Completed* from **State** list.

#### Figure 2–16 Task Complete

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Figure 2–17 Worklist Task History

# 2.3 BPM Routing Rules Setup

This section describes the steps and the screens required to configure BPM rules for approval. Same can be referred for configuring any other routing rules based on facts available in human task payload.

- 1. Log in to Worklist App using Weblogic / Weblogic1 [or any other user with administrators as role].
- 2. Click Administration link.

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Figure 2–18 Worklist App - Administration Link

3. Navigate to Task Configuration tab.

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#### Figure 2–19 Task Configuration

4. Search the task by inputting the name of the task in the search bar. For example, HT\_LoanSpi\_ CreateAndConfigureLoanAccount or \*CreateAndConfigureLoan\* or \* PromiseToPay\*.

### Figure 2–20 Search Task Types

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5. Click the result to open the task for editing.

# Figure 2–21 Task Editing

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6. Click the Edit icon.

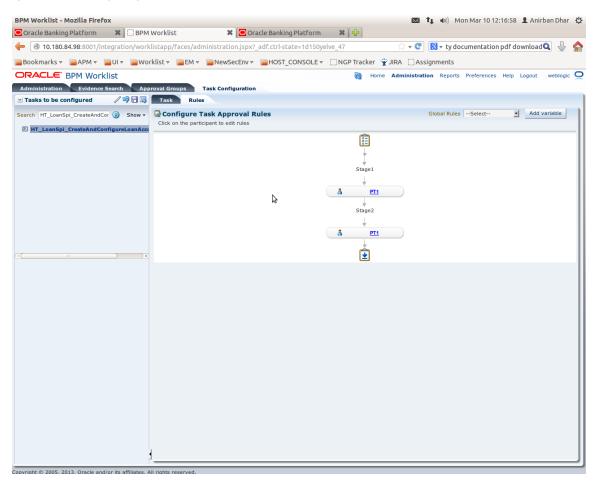


Figure 2–22 Configuring Rules - Edit Icon

- 7. Navigate to **Rules** tab for configuring rules.
- 8. Click participant to edit rule for that stage. For example, stage 1 -> PT1)

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Figure 2–23 Configuring Rules - Rules tab

9. Expand the **Rule** to configure. For example, Rule 5.

### Figure 2–24 Expand Rule

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## Figure 2–25 Advanced Settings

## Figure 2–26 Rule Expansion

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11. Click **Active** check box to enable a particular rule.

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## Figure 2–27 Enabling Rule

12. Click the drop-down arrow to add a new row of condition and select **Simple Test**.

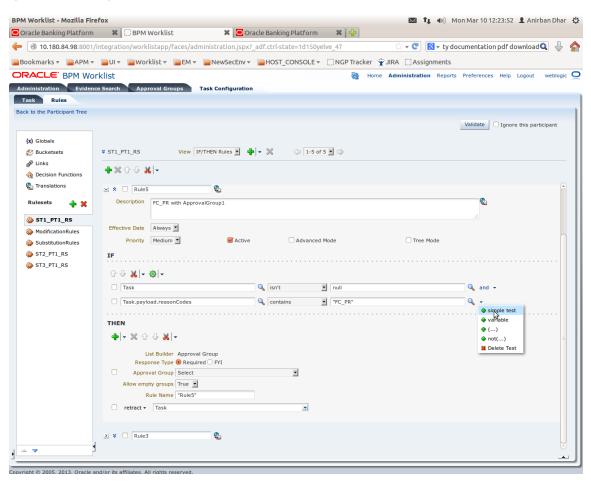
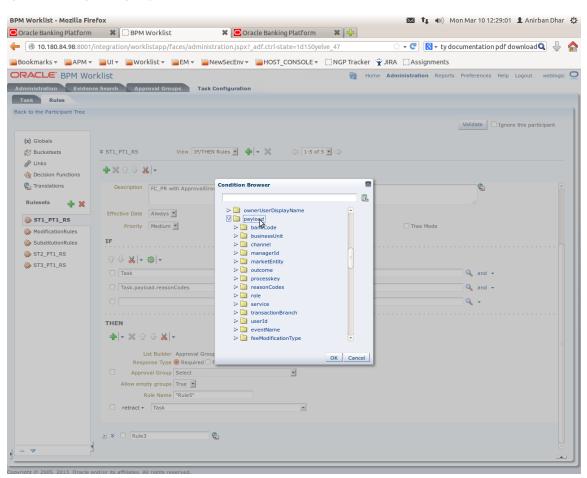


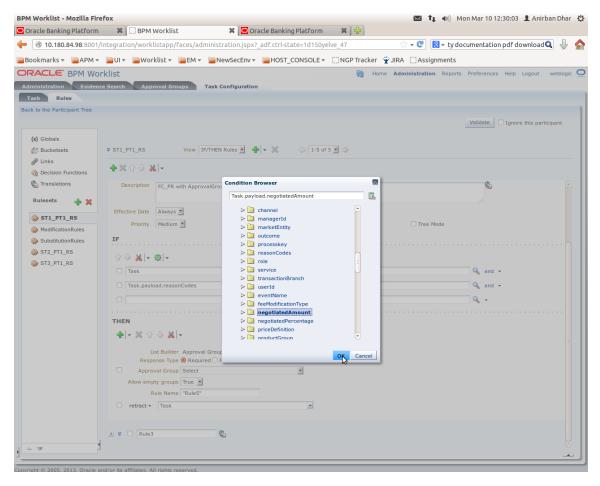
Figure 2–28 Adding New Row of Condition

13. Expand Task -> Payload and then select the fact.



#### Figure 2–29 Expanding Payload

#### Figure 2–30 Selecting Fact



14. Update the fact value as per condition required for routing.

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#### Figure 2–31 Updating Fact Value

## Note

Negotiated Amount should be multiplied by 10000. For example, if you want to set limit for \$5 negotiated amount, then in BPM rule you need to put fact value as 50000.

15. Select **Approver Group** from the option list. For example, select FEE\_APPROVER.

#### Figure 2–32 Select Approver Group

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<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Second	Tree Mode	Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Second	Tree Mode	Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Second	Tree Mode	Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Second	☐ Tree Mode	Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Solution of the second seco		Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority Medium	Image: Solution of the second seco		Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼
<ul> <li>ModificationRules</li> <li>SubstitutionRules</li> <li>ST2_PT1_RS</li> </ul>	Priority     Medium ■     ●       IF       □     Task       □     Task.       □     Task.       □     Task.       □     Task.       □     Task.       □     Task.       □     Task.payload.regotiatedAmount       □     Task.payload.negotiatedAmount       □     Task.payload.negotiatedAmount       □     Task.payload.negotiatedAmount       □     Task.payload.negotiatedAmount       □     Task.payload.negotiatedAmount       □     Task.payload.negotiatedAmount       □     List Builder Approval Group       Response Type Required _ PMI       □     Approval Group       FEE_APPROVER       Allow empty groups     True ■	Image: Solution of the second seco		Q <sub>6</sub> and ▼ Q <sub>6</sub> and ▼

16. Save and commit the rule and the task.

You can follow similar steps to configure rules on different stages. Ensure the desired rule is active.

If no rule is evaluated, then the task will be auto rejected by workflow system.

## 2.4 Enabling Local Approval Worklist Authorization

Local Approvals is an alternative for the SOA setup. Instead of approving the approval task from BPM. The approver can approve or reject the approver task through Work Item Inquiry page. This section explains the process for Local Approval Worklist authorization.

## 2.4.1 Day Zero Setup for Local Approval Worklist Authorization

The local Approval setup can be enabled through day zero seed. It is configured at the service level not at the Enterprise level. Hence, SOA processes and Local approval can co-exists.

Checkpoints for the Day Zero:

 In the table flx\_fw\_config\_all\_b prop\_value should be true for prop\_id 'isLocalApprovalConfigurationFlag' and category\_id 'LocalApprovalServicesConfig'

- In the table flx\_fw\_config\_all\_b prop\_value should be false for prop\_id 'isLocalApprovalCommonFlag' and category\_id 'LocalApprovalServicesConfig'
- 3. In the table **FLX\_FW\_CONFIG\_ALL\_B an entry for** Category Id 'LocalApprovalServicesConfig' with prop id as the Identified Application service spi plus its method name for which local approvals needs to be configured with prop value as true.

## 2.4.2 Enabling the Local Approval WorkList Authorization

## Step 1 Identify the Service Name

There can be two services for the same service. A normal 'app' service and 'appx' service. We need to identify both the services.

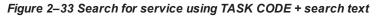
For example, Add Transaction Limit will have the following two services:

- com.ofss.fc.app.recovery.service.settlementoffer.SettlementOfferDetailsApplicationServiceSpi.callF orApprovalFrVendor
- com.ofss.fc.appx.recovery.service.settlementoffer.SettlementOfferDetailsApplicationServiceSpi.call
   ForApprovalFrVendor

## Step 2 Enable Dual Authorization

Once the services are identified, follow the below steps to enable Dual Authorization.

- 1. Log in to Oracle Banking Enterprise Default Management.
- 2. Navigate to Artifact Dependency Map (Fast path: SM500) page.
- 3. In the **Search Text** field, type the service-name or a part of it or enter phrase in the format TASK\_ CODE+search\_text that helps to select the service using auto suggest behavior. For example, to search for a service for settlement offer case, search text can be as follows:
  - com.ofss.fc.app.recovery.service.settlementoffer.SettlementOfferDetailsApplicationServiceS pi.callForApprovalFrVendor



☆ SM5 <u>0</u> 0	×						ľ
Artifact [	ependency Ma	ıp					
A Resour	ce Search						
Search Text	.callForApprovalFrVend	Dr					
Note: 1. Enter search text	SERVICE,OTHER,Recov	ery - SettlementOffe	rDetailsApplicatior	nServiceSpi Call For Appr	val Fr Vendor		
3. Selecting items from	n suggest item list will result in faste	er and accurate search.	-	urce description. (Example : 'deposit c			
5. For a combination of	searches, please use 'task-code+key f artifacts and general search, pleas search, please use 'keyword(SERVICI	e use 'task-code+search text' p	attern. (Example - 'CASA001		ONENT+Delete' / 'SM126+	+SERVICE+Delete')	
	alues are displayed where search cri		, ,				
ID:INC DESC:Incentive TYPE: MODULE		ID:IDL DESC:Indirect Lending TYPE:MODULE	ID:ACCT DESC:Account TYPE:MODULE	ID:Bundle DESC:Bundle TYPE:MODULE			
ID:WORKFLOW	ID:PC	ID:TD	ID:ORG DESC:Origination	ID:COLLECTION DESC:Collections	-		
DESC:WORKFL TYPE:MODULE	OW DESC:Payment And	DESC:Certificate of Deposit TYPE:MODULE	TYPE:MODULE	TYPE: MODULE			

4. Click the Approval Checks tab and add approval checks.

**X** E<u>x</u>i

#### Figure 2–34 Add Approval Checks

### Artifact Dependency Map

Settlement <b>TYPE:</b> SERVICE	Pricing Fees TYPE: SERVICE	Financial Parameter <b>TYPE:</b> SERVICE	Composite Template <b>TYPE:</b> SERVICE	Active Products <b>TYPE:</b> SERVICE	Identity Verification History <b>TYPE:</b> SERVICE	Allowed Access Channels For Account	Booked Application Collaterals For Settle	Last Activity TYPE: SERVICE	Submission Required For Bundle <b>TYPE:</b> SERVICE	Composite Recoverable <b>TYPE:</b> SERVICE	TYPE: SERVICE
DESC:Loan - LoanSched Simulate	ID:com.ofss.fc.a DESC:Collection - Supervisor Create TYPE: SERVICE	ID:com.ofss.fc.a DESC:Sms - InternalUs Maintain Users TYPE:SERVICE	ID:com.ofss.fc.a DESC:Resourceit - ResourceIt Delete Resource Item Linkage	ID:com.ofss.fc.a DESC:Party - ImageAppl Update Image TYPE:SERVICE	ID:com.ofss.fc.a DESC:Loan - LoanSched Get Current Stage For Loan Stage Configurat TYPE:SERVICE	ID:com.ofss.fc.a DESC:Party - FatcaDetai Reopen Fatca Details TYPE: SERVICE	ID:com.ofss.fc.a DESC:Account - BundleInq Fetch All Subscription Details TYPE:SERVICE	ID:com.ofss.fc.a DESC:Party - BureauRep Close Bureau Report TYPE: SERVICE	ID:com.ofss.fc.a DESC:Ins - PropertyIn Save Selected Quote TYPE: SERVICE	ID:com.ofss.fc.a DESC:Ops - NounAppli Fetch Rollups TYPE: SERVICE	ID:com.ofss.fc.a DESC:Config - DmsPrope Close Dms Properties TYPE: SERVICE
DESC:Integration - MDMBatch Add M D M	ID:com.ofss.fc.a DESC:Collection - ValidateVi Read TYPE:SERVICE	ID:com.ofss.fc.a DESC:Collection - ActionAppl Update TYPE:SERVICE	ID:com.ofss.fc.a DESC:Pricing - Transactio Add Transaction Details Analysis TYPE: SERVICE	ID:com.ofss.fc.a DESC:Pc - BillerCateg Import Andfetch Biller Category TYPE: SERVICE	ID:com.ofss.fc.a DESC:Party - FinancialSt Reopen Financial Statement TYPE: SERVICE	ID:com.ofss.fc.a DESC:Pricing - EventMain Inquire Event TYPE:SERVICE	ID:com.ofss.fc.a DESC:Td - Investmen Fetch Frequencies For Product TYPE:SERVICE	ID:com.ofss.fc.a DESC:Ins - Insurance Fetch By Version TYPE:SERVICE	ID:com.ofss.fc.a DESC:Dda - SweepOut Close Sweep Out Instruction TYPE:SERVICE	ID:com.ofss.fc.a DESC:Loan - LoanApplic Validate Loan Account Configurati Step	ID:com.ofss.fc.a DESC:Recovery - Settlement Call For Approval Fr Vendor TYPE: SERVICE

DUAL_CONTROL	V	USER_LIMIT	MATRIX_AUTH	

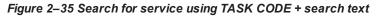
#### Step 3 Configure Severity

Enabling of dual authorization alone will not send the transaction for approval. Hence we need to configure Severity for the identified service, to enable the call for approval workflow.

This will be configured from the page Artifact Dependency Map (Fast path: SM500).

Follow the below steps to configure severity:

- 1. Log in to Oracle Banking Enterprise Default Management.
- 2. Navigate to the Artifact Dependency Map (Fast path: SM500) page.
- 3. In the **Search Text** field, type the service-name or a part of it or enter phrase in the format TASK\_ CODE+search\_text that helps to select the service using auto suggest behavior. For example, to search for a service for settlement offer case, search text can be as follows:
  - com.ofss.fc.app.recovery.service.settlementoffer.SettlementOfferDetailsApplicationServiceS pi.callForApprovalFrVendor



☆ SM50	D×			
Artifact	Dependency Ma	р		
⊿ Resou	rce Search			
Search Text	i.callForApprovalFrVendo	r		
Note: 1. Enter search text		ry - SettlementOffe	rDetailsApplication	ServiceSpi Call For Appro
<ol> <li>Selecting items f</li> <li>For faster and fir</li> <li>For a combinatio</li> <li>For quick SERVIC</li> </ol>	ation to a resource (service, taskflow, ui- rom suggest filem list will result in faster er searches, please use 'task-coderkeyv n of artifacts and general search, please E search, please use 'keyword/SERVICE) i values are displayed where search critic	and accurate search. vord(UL_COMPONENT/SERVI use 'task-code+search text' +search text' pattern. (Exam	CE)(ignore case)+search text hattern. (Example - 'CASA001	pattern. (Example - 'SM126+UL_COMPC +deposit cash)
ID:INC DESC:Incent TYPE:MODU		ID:IDL DESC:Indirect Lending TYPE: MODULE	ID:ACCT DESC:Account TYPE:MODULE	ID:Bundle DESC:Bundle TYPE: MODULE
ID:WORKFLC DESC:WORK TYPE:MODU	FLOW DESC:Payment And	ID:TD DESC:Certificate of Deposit TYPE: MODIUE	ID:ORG DESC:Origination TYPE:MODULE	ID:COLLECTION DESC:Collections TYPE:MODULE

4. Ensure approval checks are added. If not, then configure the approval checks.

## Figure 2–36 Dual Control

## Artifact Dependency Map

**X** E⊻i

	Template <b>TYPE:</b> SERVICE	Active Products <b>TYPE:</b> SERVICE	Identity Verification History <b>TYPE:</b> SERVICE	Allowed Access Channels For Account	Booked Application Collaterals For Settle	Last Activity TYPE: SERVICE	Submission Required For Bundle <b>TYPE:</b> SERVICE	Composite Recoverable <b>TYPE:</b> SERVICE	TYPE:SERVICE
fc.a ID:com.ofss.fc.a ion - DESC:Sms - InternalUs Maintain CE TYPE: SERVICE	ID:com.ofss.fc.a DESC:Resourceit ResourceIt Delete Resource Item Linkage	ID:com.ofss.fc.a DESC:Party - ImageAppl Update Image TYPE:SERVICE	ID:com.ofss.fc.a DESC:Loan - LoanSched Get Current Stage For Loan Stage Configurat TYPE:SERVICE	ID:com.ofss.fc.a DESC:Party - FatcaDetai Reopen Fatca Details TYPE:SERVICE	ID:com.ofss.fc.a DESC:Account - BundleInq Fetch All Subscription Details TYPE:SERVICE	ID:com.ofss.fc.a DESC:Party - BureauRep Close Bureau Report TYPE: SERVICE	ID:com.ofss.fc.a DESC:Ins - PropertyIn Save Selected Quote TYPE:SERVICE	ID:com.ofss.fc.a DESC:Ops - NounAppli Fetch Rollups TYPE:SERVICE	ID:com.ofss.fc.a DESC:Config - DmsPrope Close Dms Properties TYPE: SERVICE
fc.a ID:com.ofss.fc.a ion - eVi ActionAppl Update CE TYPE:SERVICE	ID:com.ofss.fc.a DESC:Pricing - Transactio Add Transaction Details Analysis TYPE: SERVICE	ID:com.ofss.fc.a DESC:PC - BillerCateg Import Andfetch Biller Category TYPE: SERVICE	ID:com.ofss.fc.a DESC:Party - FinancialSt Reopen Financial Statement TYPE:SERVICE	ID:com.ofss.fc.a DESC:Pricing - EventMain Inquire Event TYPE:SERVICE	ID:com.ofss.fc.a DESC:Td - Investmen Fetch Frequencies For Product TYPE:SERVICE	ID:com.ofss.fc.a DESC:Ins - Insurance Fetch By Version TYPE: SERVICE	ID:com.ofss.fc.a DESC:Dda - SweepOut Close Sweep Out Instruction TYPE:SERVICE	ID:com.ofss.fc.a DESC:Loan - LoanApplic Validate Loan Account Configurati Step	ID:com.ofss.fc.a DESC:Recovery - Settlement Call For Approval Fr Vendor TYPE: SERVICE
	on - DESC:Sms - InternalUs Keiter Users TYPE:SERVICE C.a ID:com.ofss.fc.a DESC:Collection - DESC:Collection - DESC:Collection - Update	on - DESC:Sms - InternalUs Maintain User's Resourceit Resourceit User's TYPE:SERVICE Resourceit item Linkage c.a ID:com.ofss.fc.a DESC:Collection - DESC:Pricing - Transactio Update Add TYPE:SERVICE DESC:Pricing - Add Transactio Details Analysis	on - DESC:Sms - InternalUs ImageAppl Maintain ResourceIt Update Users Delete Image TYPE:SERVICE Resource Item Linkage View ActionAppl DESC:Pricing - DESC:Pricing - DESC:Pricing - DESC:Pricing - Update Add Import ActionAppl Transaction BillerCateg Update Add Import Andrétch Biller Category Analysis Category	on - DESC:Sms - DESC:Resourceit DESC:Party - ImageAppl Maintain Resourceit DESC:Party - ImageAppl Update Get Current Item Linkage TYPE:SERVICE Resource Item Linkage DESC:Pring - Pring - DESC:Pring - DE	DESC:Sms - sor         DESC:Resourceit         DESC:Party - ImageAppl         DESC:Cloan - LaadSched         DESC:Party - FatcaDetail           Waintain E         Resourceit         Update         Get Current Image Stage For Item Linkage         Stage For Stage For Item Linkage         Stage For Stage For Item Linkage         TYPE:SERVICE         Desc:Party - Gonfigurat           0         DESC:Collection - Linkage         ID:com.ofss.fc.a ID:com.ofss.fc.a         ID:com.ofss.fc.a DESC:Pricing - Parasatio         ID:com.ofss.fc.a DESC:Pricing - BIErCaperty - Transactio         ID:com.ofss.fc.a BIErCaperty - BIErCaperty - BIErCape	on - DESC:Rs - InternalUs DESC:Resourceit DESC:Party - ImageAppl DESC:Claan - LoanSched Reopen - FatcaDetail Resourceit Update Ubers Delete Image Stage For IYPE:SERVICE Resource TYPE:SERVICE LoanStage Configurat TYPE:SERVICE Details Ubers Delete Image Configurat TYPE:SERVICE Details DESC:Party - DESC:Party - Linkage Configurat TYPE:SERVICE Details DESC:Party - DESC:	on - DESC:Sins - InternalUs DESC:Resourceit DESC:Party - ImageAppl LoanSched DESC:Party - FataDetails Dedets - ImageAppl Update Get Current Stage For Users Delete Resource It Update Stage For Users Delete Resource It Unkage TYPE:SERVICE Loan Stage Configurat TYPE:SERVICE Details Subscription Bureau Linkage Configurat TYPE:SERVICE Details Subscription Bureau Linkage DESC:Party - FataDetails Details Details Details Configurat TYPE:SERVICE Details Details Details Configurat TYPE:SERVICE Details	on - DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit DESC:Resourceit Update Get Current Resourceit Update Stage For FatcaDetails Subscription Bureau Selected Item Linkage Configurat TYPE:SERVICE Linkage Configurat TYPE:SERVICE Item Co	on - DESC:Resourcelt Resource TYPE:SERVICE Loan Stage For Isreau Configurat TYPE:SERVICE Item Linkage Configurat TYPE:SERVICE Item Linkage Configurat TYPE:SERVICE Item Linkage DESC:Resource TYPE:SERVICE DESC:Resource TYPE:SERVICE Item Linkage DESC:Resource TYPE:SERVICE Item Linkage DESC:Resource TYPE:SERVICE DESC:Resource D

5. Click the **Severity** tab and update the severity, if already maintained. Otherwise, click the Add button in the toolbar to add new row in table.

## Figure 2–37 Add New Severity

Integration		Details	Biller	Statement	TYPE: SERVICE		TYPE: SERVICE	Instruction	Account	Vendor
Log E:SERVICE		Analysis TYPE: SERVICE	Category TYPE: SERVICE	TYPE: SERVICE		TYPE: SERVICE		TYPE: SERVICE	Configurati Step	TYPE:SERVICE

General Details Permissions Approval Checks Severity Service Attributes Service Javadoc	
---	--

View 🔻	+ X 🗄 📑	Detach			
Branch					
Code	Role ID	Channel Id	Reason Code	SEVERITY	Local Approver Type
				Ţ	
3010	administrators	BRN	1000	OVERRIDE •	Rule Id
ANY	administrators	BRN	1000	OVERRIDE •	Rule Id
ANY	Administrators	BRN	1000	OVERRIDE •	Rule Id

## 6. Enter the following details in the **Severity** tab.

Branch Code	Branch code from which the transaction is to be performed. Specify ANY to configure for all branches. Example: 082991
Role ID	Security Role to which the user belongs and initiates the transaction.
Channel ID	Channels such as BRN, ATM, IB and so on, through which the transaction is performed.
Reason Code	Select Reason Code 1000 normal approval flow.
Severity	<ul> <li>This field contains four values as detailed below:</li> <li>Ignore: Allows transaction to complete without any authorization, that is Auto Authorization.</li> <li>Override: Transaction will be sent for Authorization.</li> </ul>

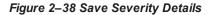
<b>Notify:</b> In this case, the task is not sent for authorization, but the user is expected to confirm the transaction for proceeding ahead. This option is not applicable in case of Dual Authorization.
Reject: System does not allow to proceed with transaction.

To enable Dual Authorization, select **Override** option.

Note

At times you may also notice that the Severity Configuration is already set up. Do not change it.

7. Save newly added severity using the **Save** button in toolbar.



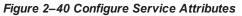
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			ks Severity Reason Code		e Attributes Service . /erity					Rule Id



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Integration Log			Analysis						
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Branch Code Ro	ole ID	Channel Id	Reason Code	SEVERITY	Local Approver Type				Rule Id

## Step 4 Configure Service Attributes

Service attributes are the attributes that are configured with service using which rules can be evaluated. These can be configured by running the Policy Store setup.



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E ORACLE <sup>®</sup>		🕖 Fast Path/Screen Name Q	■ ★ X Posting Date Feb 04, 2024 OFSSUser
<u> </u>			
Artifact Dependency Map			🗙 E <u>x</u> it
Integration Log TYPE: SERVICE	Details Biller Statement Analysis TYPE:SERVICE TYPE:SERVICE	TYPE:SERVICE For Product TYPE:SERVICE TYPE:SERVICE	Instruction Account Vendor TYPE:SERVICE Configurabl Step
General Details Permissions App	roval Checks Severity Service Attributes Service	e Javadoc	
View 🔻 🕂 🔀 🗟 Detac	h		
Name	Value		A 7
AllowedPolicyAttributes	SettlementOfferDetailsMatrix_SettlementUserRole,Settleme	entOfferDetailsMatrix_Settlen	OfferDetailsMatrix_SetImntOfferValidity,SettlementO

## Step 5 Policy Management Setup

Policy management setup is used to provide grants to the specific roles.

For eaxmple: Adminstartor, systemAdministrator, and so on.

Following are the steps needs to be followed:

1. Login to the Policy Management Screen, search the Resource through the identified service name.

## Figure 2–41 Search Resource

<u>ه</u>	SM5 <u>0</u> 2×							
Poli	Policy Management							
⊿ R	esource Name							
	* Resource com.ofss.fc.appx.recovery.service.settlementoffer.SettlementOfferDetailsApp	licationServiceSpi	.callForApprovalF	rVendor				
	* Resource Type SERVICE							
⊿ P	olicy Table							
View	w 🗸 🕂 🗶 🔄 Detach							
	NAME	* EFFECT	* ACTION	DESCRIPTION	* ROLES	CONDI	TIONS	
	${\tt ADMINISTRATORS\_OBP\_APPX\_RECOVERY\_SERVICe\_SETTLEMENTOFFER\_SETTLEMENTOFFERDETAILSAPPLI}$	GRANT	PERFORM	ADMINISTRA	Administrators			
	SYSTEMADMINISTRATORS_OBP_APPX_RECOVERY_SERVICE_SETTLEMENTOFFER_SETTLEMENTOFFERDETAI	GRANT	PERFORM	SYSTEMADM	SystemAdmi			

2. In case require to add a policy. Click on add button of the tool bar. Specify the Role for which grants to be given then click save button.

#### Figure 2–42 Select Role

5	SM5 <u>0</u> 2 ×						
oli	olicy Management						
⊿ R	esource Name						
	* Resource com.ofss.fc.appx.recovery.service.settlementoffer.SettlementOfferDetailsA	pplicationService	Spi.callForApprova	lFrVendor			
	* Resource Type SERVICE						
⊿ P	olicy Table						
Vie	w 👻 🕂 🗶 🔄 🖃 Detach						
	NAME	* EFFECT	* ACTION	DESCRIPTION	* ROLES	CONDITIO	
		•	•		sys		
	ADMINISTRATORS_OBP_APPX_RECOVERY_SERVICE_SETTLEMENTOFFER_SETTLEMENTOFFERDETAILSAP	GRANT	PERFORM	ADMINISTRA	SystemAdmir	istrators	
	SYSTEMADMINISTRATORS_OBP_APPX_RECOVERY_SERVICE_SETTLEMENTOFFER_SETTLEMENTOFFERDET	GRANT	PERFORM	SYSTEMADM	SystemAdmi		

## 2.4.3 Local Approval Rule Setup

This section describes the steps and the screens required to configure Local Approval rules for approval. Below are the steps to follow:

### Step 1 Facts Setup

The Facts that are used for Rule creation are created through seed.

## Step 2 Rule Creation through Rule Author screen

While creating the Rule Domain Id should be **Global** and Domain category Id should be **Approvals**. Facts should be selected from the Work Item Category. Stage 1:Approver Id is the Approver and isGroup Specify whether approval is going for group or not.

## 1. Normal Rule Creation

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E ORACLE®		Fast Path/Screen Name Q	E 🛧 🗙 Posting Date Feb 04, 2024	e OFSSUser - 🚥 4		
🐔 RL <u>0</u> 01 ×						
Rule Author		<u>Read</u> <u>⊢</u> <u>Create</u>	e	<u>⊿ Cl</u> ear 🗙 E <u>x</u> it		
Domain ID	Global	Domain Name	Global	•		
Domain Category ID	Approvals	Domain Category Name	Approvals	- I		
* Rule ID	APP_SUM_ACT_BRN_3010	* Name	APP_SUM_ACT_BRN_3010			
* Effective Date	Jan 18, 2024	* Description	APP_SUM_ACT_BRN_3010			
Authoring	GRE	Version	1			
Multi Value Fact	-					
Authoring Usages (0)						
Authoring       Usages (0)         If       (ReasonCode equal to 1000 )         And (Recovery:Settlement.AccountBranch equal to 3010 )       )						

## Figure 2–43 Normal Rule Creation

2. Double Stage Rule

Figure 2–44 Double Stage Rule

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ule Author	III <u>R</u> ead	Create 🕝 Update	Copy Pr	rint 🔻	
4					
lf					
(ReasonCode equal to 💌 1000 💌 )					
And 💌 (Actual Settlement Percentage less than 💌 50.5 🗙 💌 )					
+ Then					
Stage1.ApproverId equal to manojm_us 🖉					
🔶 isGroup equal to False 🖕					
Stage2.Approverid equal to OFSSUser 🔗 🗙					
🖕 isGroup equal to False 🍦					
+					
Add Block					

3. Group Rule

Rule Author	Bead + Create ② Update □ Copy □ Print ✓ 0K							
* Effective Date Jan 28, 2024	* Description SETTLE_APPROVAL							
Authoring GRE	Version 1							
Multi Value Fact 📃								
Authoring Usages (0)								
4								
	lf							
(ReasonCode equal to 1000 )	(ReasonCode equal to 1000 )							
And (Actual Settlement Percentage less than 50.5 )	And (Actual Settlement Percentage less than 50.5 )							
-								
Then								
Stage1.ApproverId equal to Administrators								
🖕 isGroup equal to True								

Figure 2–45 Group Rule

Step 3 Attaching rule in Artifact Dependency Map

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<u> </u>	001 × SM500 ×		
Artifa	ct Dependency Map		🗙 E <u>x</u> it
	tegration 19 RVICE	Details Biller Statement TYPE:SERVICE	For Product TYPE:SERVICE Instruction Account Vendor Configuration TYPE:SERVICE Step
Genera	I Details Permissions Appr	oval Checks Service Attributes Service Javadoc	
View	• + X 🖯 🖙 📾	Detach	
ode	SEVERITY	Local Approver Type	Rule Id
	OVERRIDE •	RuleId	MANULOS_AMT
	OVERRIDE •	Rule Id	MANUL_OS_AMT
	OVERRIDE •	Rule Id	MANUL_OS_AMT
	OVERRIDE •	Rule Id 🔹	MANUL_OS_AMT
•			• •

## 2.4.4 Local Approval Testing

Following are the steps which need to be followed:

## Step 1 Initiating the Local Approval Process through screen

Go to the screen from which process needs to be initiated if the configurations are correct following message will come.

e oraci	E.				(	Fast Path/Screen N	ame Q	∎ ,		Posting Date Feb 04, 2024	OFSSUser 🗸
☆ REC1 <u>0</u> 0 × R	EC <u>1</u> 99 ×										
Service Reco	very Acco	1 Inform	ation						×		<b>X</b> E <u>2</u>
	1	Transaction has	s been queued in the a	approval worklist. W	orkitem Id : 202	4035046160923 , Refere	nce Number : 202	403504616	50923.		
91315992844068	System									View	
97164184592631	System								OK	View	
63647478415979	System	Nov 02, 2023	Nov 09, 2023	\$254,562.23	12 Days	English System	English System	Rejec	cted by Cust	. View	
64525661334496	System	Oct 09, 2023	Oct 12, 2023	\$140,009.23	7 Days	English System	English System	Rejec	cted by Cust	. View	
Add Offer											
Basics											
	Offe	r Date Feb 04, 2	024				* Offer Expiry 2	D	ays (Feb 08,	2024)	
	* Settlement Ar	nount \$225,90	2.00			* Se	tlement Term 3	) Di	lays		

## Figure 2–47 Successful Message

## Step 2 Search Worklist Item

Go to WL001 screen search with the reference number.



	:LE°				🧿 🛛 Fast Path,	/Screen Name	۹ 🔳 ۲	* X	Posting Date Feb 04, 2024	OFSSUser 🗸 🚥
☆ WL <u>0</u> 01 ×										
Work Item I	nquiry									🗙 E <u>x</u> it
Posting Date	Party ID	Work Item ID	Transaction Type	Task Code	Entered By	Final Approver ID	Work Item Status	Final Approver Action	Nature of Transaction	Account Numb
Feb 04, 2024	000009873	2024035046160923	Non Financial Transa	REC199SO	OFSSUser	[OFSSUser]	INITIATED		Normal	300354278
✓ Work Item	Details	Task Code Posting Date Initiation Date	2024035046160923 REC199S0 Feb 04, 2024 27-Feb-2020 10:54:29 A OFSSUser 30	м		c	Messagr Reference Ni Driginal Reference Ni Final Appro	umber 20: umber	IRMAL_MSG 24035046160923 FSSUser]	

## Step 3 Approve/Reject the Worklist Item

**Final Approver Id** as **OFSSUSER** has come .That means for "**OFSSUSER**" user Approve and Reject button are enabled. If the Approver Approves the request the transaction commits and for Rejection whatever is configured happens.

ORACLE	REC199SO			(	Fast Path/Screen	Name Q		Feb 04, 202	4 OFSSUser -
WL <u>0</u> 01 ×	Settlement Offer	(s)					_	•	
Vork Item Inquiry	Add Offer								XE
Search Results	Offer ID	Offer Type	Offer Date	Offer Expiry	Settlement Amount	Settlement Term	User		
View 👻 📴 📓 Detach		Manual	Feb 04, 2024	Feb 08, 2024	\$225,902.00	3 Days	OFSSUser OF		
Wiew V	68100672412202	System	Jan 08, 2024	Jan 11, 2024	\$238,417.28	17 Days	English Syste		
0	20511509658531	System	Dec 21, 2023	Jan 01, 2024	\$227,494.11	45 Days	English Syste		
Posting Date Party ID	91315992844068	System	Dec 04, 2023	Dec 07, 2023	\$280,856.92	25 Days	English Syste	Nature of Transactio	
Feb 04, 2024 000009873	97164184592631	System	Nov 20, 2023	Nov 27, 2023	\$282,846.92	12 Days	English Syste	Normal	300354278
	63647478415979	System	Nov 02, 2023	Nov 09, 2023	\$254,562.23	12 Days	English Syste		•
Work Item Details	64525661334496	System	Oct 09, 2023	Oct 12, 2023	\$140,009.23	7 Days	English Syste		
= Work item Details	4						÷		
					_		۲		
				Cancel Reque	st Reverse Transacti	ion Reject A	pprove Close	MAL_MSG	

Figure 2–49 Approve and Reject button Enabled

# **3 Setting Up The Bank And Branch**

This chapter provides the process of setting up the bank and the branch commonly referred to as the Day 0 setups.

# 3.1 Common Services Day 0 Setup

The Common Services setup includes the following sections.

## 3.1.1 Core Maintenances

Core Entity Services seek to define the broad parameters within which the rest of the application functions. The service defines the bank, the various modules of the application that the bank may want to introduce, the languages and the time zones it operates in, the core parameters and structures of its various branches. The core entity services are also used by each of the different modules, and provide a variety of support functions to them.

The following Core Maintenances must be completed as a part of bank and branch setup:

- Bank Codes (Fast path: CS01)
- Bank Parameters (Fast path: CS03)
- Branch Parameters (Fast path: CS06)
- Country Codes (Fast path: CS09)
- Financial Cycle (Fast path: CS10)
- Define Payment Calender Codes (Fast path: CS15)
- Reason Codes (Fast path: CS16)
- State Codes (Fast path: CS17)
- Purpose Codes (Fast path: CS24)
- Bank Policy (Fast path: CS26)
- Transaction Code Maintenance (Fast path: CS44)
- Define Non-Financial Event Transaction Code Mapping (Fast path: CS45)
- Data Security Configuration (Fast path: CS50)

## Note

To view the detailed procedure for each application page, see its context sensitive help in the application.

## 3.1.1.1 Head Office Setup

The Head Office branch creation is currently being done via seed data where the Branch Type is HO. Branch Type is a seed table with fixed values for all applicable branch types, that is uploaded to the application from the backend. After the creation of Head Office branch through seed data, you can proceed to create other branches from the application where the Branch Type is shown as a LOV (excluding HO).

The process to set up a head office branch is as follows:

- 1. Create a new bank code in the application through the page Bank Codes (Fast path: CS01).
- 2. Set up the new bank parameters through the page Bank Parameters (Fast path: CS03).
- 3. Modify the seed data for Branch Type to include the new bank code as HO and run the seed. Currently the seed will be for Bank Code 08. The head office branch is created via this seed data.
- 4. Proceed to create the other branches through the application using the page **Branch Parameters (Fast Path: CS06)**, that includes all branch types other than HO.

#### Note

To view the detailed procedure for each application page, see its context-sensitive help in the application.

## 3.1.2 Currency Maintenances

The Currency Services are a part of the common services of Oracle Banking Platform and serve to record and retrieve the various currency related information.

The following Currency Maintenances must be completed as a part of bank and branch setup:

- Currency Codes (Fast path: CY01)
- Amount Text (Fast path: CY02)
- Currency Pairs (Fast path: CY03)
- Currency Branch Parameters (Fast path: CY04)
- Currency Denomination (Fast path: CY05)
- Currency Rate Types (Fast path: CY06)
- Exchange Rates (Fast path: CY07)

#### Note

To view the detailed procedure for each application page, see its context-sensitive help in the application.

## 3.1.3 Calendar Maintenances

The calendar services are embedded in the common services and serve to record and retrieve the various holidays of the bank in a calendar year.

The following Calendar Maintenances must be completed as a part of bank and branch setup:

- Holiday Rule Maintenance (Fast Path: CAL01)
- Calendar Type Maintenance (Fast Path: CAL02)
- Adhoc Calendar Maintenance (Fast path: CAL03)

#### Note

To view the detailed procedure for each application page, see its context-sensitive help in the application.

## 3.2 Accounting Day 0 Setup

The Accounting module is supported by Module Accounting, Domain Accounting, and Accounting Services.

- Module Accounting handles transaction initiation, raises accounting event, and updates the customer account balances and Overdraft limits, and invokes account services.
- Domain Accounting provides the services such as input, authorize, delete, and reverses to the modules to enable the module to initiate appropriate action on the transactions. Domain accounting also validates data and lookup accounting template, builds domain entries, and performs currency conversions.
- Accounting Services pick up the entries formed by the domain accounting and perform GAAP accounting, netting, currency position, Inter Branch entries, tanking of unauthorized transactions, suspense posting, generation of P&L entries for year end, and hand off data to product ledger.

The following Accounting maintenances must be completed as a part of bank and branch setup:

- Define System Defined Elements (Fast path: AS013)
- Define Accounting Configuration (Fast path: AS001)
- GAAP Summary (Fast path: AS005)
- Define Bank Parameter (Fast path: AS002)
- Define Branch Parameter (Fast path: AS003)
- Define SDE Range (Fast path: AS012)
- System Defined Elements Class Summary (Fast path: AS011)
- Define Accounting Ledger (Fast path: AS009)
- Define Accounting Ledger (Additional) Details (Fast path: AS010)
- Define Accounting Ledger Group (Fast path: AS008)
- Define Inter Branch Parameters (Fast path: AS006)
- Define Domain Category Accounting Template (Fast path: AS016)
- Define Domain Role Mapping (Fast path: AS019)

## Note

To view the detailed procedure for each application page, see its context-sensitive help in the application.

## 3.3 Product Manufacturing Day 0 Setup

Following are the required setups:

## Prerequisites

Following are the prerequisites for Product Manufacturing Day 0 Maintenances:

- Common Services: Purpose Code, Currency Code, Calendar Maintenance, Bank Policy
- Accounting Template Maintenance

- DMS maintenance: Document Type Definition (Fast path: CNM01), Document Category Definition (Fast path: CNM02), Document Policy Definition (Fast path: CNM03)
- Risk Indicators Impacts Cross-Reference (Fast path: ACCT010)
- Rate Chart Maintenance (Fast path: PR004)
- Index/Margin Index Code Definition (Fast path: PR005)
- Price Policy Chart Maintenance (Fast path: PR007)
- Price Definition (Fast path: PR006)
- Charge Attribute Definition (Fast path: PR008)

## **Day 0 Maintenances**

The following Product Manufacturing Maintenances must be completed as part of bank and branch set up:

- Define Hardship Relief Policy (Fast path: PM006)
- Define Interest Rule (Fast path: PM011)
- Define Domain Category Settlement Mode (Fast path: PM030)

#### Note

To view the detailed procedure for each application page, see its context-sensitive help in the application.

# 4 Application Monitoring Using Administration Application

This chapter provides an overview on the various monitoring operations performed as an administrator using Administration application.

# 4.1 Dynamic Monitoring Service (DMS)

The aim is to monitor different channels involved in performing transactions with OBEDM. The monitoring parameters consists of channels, services, trends (current behavior of execution), and time metrices. The monitoring is performed by DMS (Dynamic Monitoring Service).

## What is DMS?

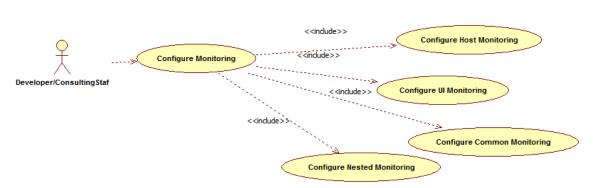
The Oracle Dynamic Monitoring Service (DMS) provides a set of Java APIs that measure and report performance metrics, trace performance and provide a context correlation service for Fusion Middleware and other Oracle products. Along with the APIs, DMS provides interfaces to enable application developers, support analysts, system administrators, and others to measure application-specific performance information.

## 4.1.1 Usage

The usage of DMS is defined by the role of the user. Based on their roles, users can either take part in configuration of services for DMS or monitor the statistics collected via DMS.

## Developers

These are the set of people who configure the monitoring services that are the part of OBEDM system. The configuration can be made either for available services or for new services.

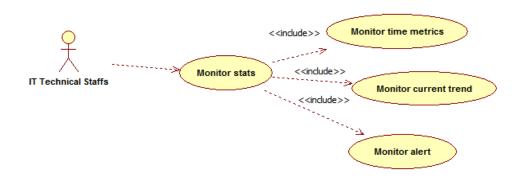


## Figure 4–1 Developers

## IT Technical Staff

This consists of set of people who monitor the DMS statistics generated for the service. With the help of various metrics generated they can analyze the behaviour of the target service. For example, 'time taken to execute' service could indicate need of optimization of the service.

## Figure 4–2 IT Technical Staff



## 4.1.2 Monitoring Application using the OPA001 page

Once DMS statistics are captured for a particular Channel and transactions involving it, it requires a UI representation to understand the statistics in a readable form so that one can analyse the behaviour. The monitoring activities are mainly carried out by IT Technical staff.

## 4.1.2.1 Monitoring Application Performance (Fast path: OPA001)

This page gives the monitoring statistics of different channels and the transactions occurring through it. It gives the time metric of the transactions, trend of the current transactions, and alert for the channel.

																	🚔 Prir	* 🗳
f Mo	nitor App	plication Perfor	mance															
4 40	plication P	Performance Sum	mao/										0.	Dafaad		2015 11:40:12 AM		1
100	plication	enormance Sun	mary										Pa	ige keiresr	ied 27-May-	2015 11:40:12 AM	GMT+05:30	
						🕜 Bra	nch 🛛 🕄 ATM	<li>Internet ()</li>	Mobile									
Арі	plication P	Performance																
				AI Transactions	▼ For E	Branch												
		Event To Event	<b>.</b>		▼ For I	Branch												
View	• ® !	Export To Excel	9 🛦 »		• For I	Branch												
View	• 9	Export To Excel	9 🛦 »		• For B	Branch												
View	•	Export To Excel	9 🛦 »		• For E	Branch					Time in n	nilliseconds		Transact	tion Count	Am	nount	
	• 😥 I	Export To Excel (	❶ ▲ ≫ Layer		For I		Alert Event Time	Trend Reference Queue	Last Alert User	Average	Time in n Max	nilliseconds Min	Total	Transact		Am Debit		Cred
lert				Detach		Trend		Trend Reference Queue 4147, 5047, 3252, 3984,		Average 4,563								
	Channel	Module	Layer	C Detach	Task Code	Trend	27-May-2015 11:39:37		arun	-	Max	Min	36,501	Success	Failure			Cred
Vert	Channel Branch	Module	Layer Spi	Detach      Transaction  Perform Auto Decision	Task Code	Trend	27-May-2015 11:39:37 27-May-2015 10:46:53	4147, 5047, 3252, 3984,	arun	4,563	Max 6,463 19,078	Min 2,880	36,501 58,167	Success 8	Failure 0			
lert	Channel Branch Branch	Module ORIGINATION TD	Layer Spi Backing Bean	Detach      Transaction      Perform Auto Decision      Mored Payin_UI	Task Code	Trend	27-May-2015 11:39:37 27-May-2015 10:46:53	4147, 5047, 3252, 3984, 881, 936, 2143, 2616, 6816 6739, 2380, 1740, 758, 1	arun	4,563 4,155	Max 6,463 19,078	Min 2,880 881	36,501 58,167 35,936	Success 8 14	Failure 0 0			
Jert	Channel Branch Branch Branch	Module ORIGINATION TD PARTY	Layer Spi Backing Bean Spi	Detach     Transaction      Perform Auto Decision      Mied Payn _ UI      Add Or Update Party Financial Profile	Task Code - TD002 -	Trend	27-May-2015 11:39:37 27-May-2015 10:46:53 27-May-2015 11:39:21 27-May-2015 10:39:16	4147, 5047, 3252, 3984, 881, 936, 2143, 2616, 6816 6739, 2380, 1740, 758, 1	arun - arun -	4,563 4,155 3,993	Max 6,463 19,078 11,972	Min 2,880 881 758	36,501 58,167 35,936 3,185	Success 8 14 9	Failure 0 0 0	Debit - - -		
lert	Channel Branch Branch Branch Branch	Module ORIGINATION TD PARTY CASA	Layer Spi Backing Bean Spi Backing Bean	Perform Auto Decision      Perform Auto Decision      Mend Payar, UI      Add CU Update Aptr Pranacal Profile      Add Scu Update Aptr Pranacal Profile      Add Scu Update Accounts Save_UI	Task Code - TD002 - CASA037	Trend	27-May-2015 11:39:37 27-May-2015 10:46:53 27-May-2015 11:39:21 27-May-2015 10:39:16 27-May-2015 11:36:01	4147, 5047, 3252, 3984, 881, 936, 2143, 2616, 6816 6739, 2380, 1740, 758, 1 465, 2720	arun • arun • arun	4,563 4,155 3,993 1,593	Max 6,463 19,078 11,972 2,720	Min 2,880 881 758 465	36,501 58,167 35,936 3,185 56,535	Success 8 14 9 2	Failure           0           0           0           0           0           0	Debit - - -		

The overall page can be subdivided in to 3 sub parts on the basis of information they provide:

## 4.1.2.1.1 Application Performance Summary

This section gives the information about the different channels of OBEDM through which transactions are taking place. The information is about the health and active channels. The 'Refresh Button' on top of this section gets the latest (refreshed) metrics.

#### Figure 4–4 Application Performance Summary

⊿ Application Performance Summary					Page Refreshed 27-May-2015 11:40:12 AM GMT+05:30	69	
	& Branch	(2) ATM	<li>Internet</li>	Mobile			

Following are the few notification about the channels:

- Denotes transactions not present for the channel
- Denotes normal status that is, the number of alerts are less than the specified limit
- Denotes warning status that is, the number of alerts are in the warning range
- Denotes critical status that is, number of alerts exceeds the limit

## 4.1.2.1.2 Log Level

This section gives logger level information for the host and UI server.

#### Figure 4–5 Log Level

J Log Level UI: Host:

## 4.1.2.1.3 Application Performance

This section gives the metrics for the transaction. Metrics include timing, alert, trending information. Certain filters can be applied over the metric table. Initially only 100 (Initial page size which is configurable) transactions are displayed. To display all the transactions, 'ALL' button is to be clicked.

## Trend

Indicates trending of execution timings of transaction. It is calculated by algorithm namely, Exponential Moving Average where if the execution time goes above the specified limit which is calculated by adding average execution time of the transaction and allowed limit (varies logarithmically to execution time); the transaction is considered as trending upwards and vice-versa for downwards trend.

However, if the execution time is with the range, trend is considered as neutral.

## Alert

Indicates alerting state of the transaction. A transaction is given weight based on its properties namely, transaction type, timing category and OBEDM module. The weight gives the offset allowed for transaction execution time. If the current transaction time is greater than average transaction time + offset, it is marked as alert. Initially it is marked as 'Critical' and after sometime the state is marked as 'Warning'.

## Figure 4–6 Alert State

		Performance Sum	mary				·	Branch 3 ATM	() Intern	H Q	Mobile	]					Pi	ige Refres	hed 27-Ma	y-2015 11:40:12 AN	GMT+05:30
			<b>0</b> • • •	• Al 🔻 •	Transactions •	For	Branch														
	• •	Export to Excer	• • •	B) center																	
											Time is a	liseconds		Transact	ion Count	Amount					
	Channel	Module	Layer	Transaction	Task Code	Trend	Alert Event Time	Trend Reference Queue	Last Alett User	Average	Max	Min	Total	Success		Debit	Credit	Trend Reference	Nested Status	Alet ECID	Service
İ	Branch	ORIGINATION	Spi	Perform Auto Decision		٠	27-May-2015 11:39:37	4147, 5047, 3252, 3984,	arun	4,583	6,463	2,880	38,501	8	0			6,457	NA	ffa7b029b81303	CreditDecisionApp
	Branch	TD	Backing Bean	Mixed Payin _ UI	TD002		27-May-2015 10:46:53	881, 938, 2143, 2818, 6818		4,155	19,078	881	68,167	14	0			0,810	NA	9dfdeddo72dae	backing.MixedPayl
	Branch	PARTY	Spi	Add Or Update Party Financial Profile			27-May-2015 11:39:21	6739, 2380, 1740, 758, 1	arun	3.993	11,972	758	35,938	9	0			11,972	NA	ffa7b029b61303	PartyFinancialProfi
	Branch	CASA	Backing Bean	Alternate Accounts Save _ UI	CASA037		27-May-2015 10:39:18	465, 2720		1,593	2,720	405	3,185	2	0		-	2,720	NA	9dfdeddc72dae	AlternateAccounts
	Branch	ACCOUNT	Spi	Recommend Bundles	VML000		27-May-2015 11:38:01	424, 901, 399, 1103, 1927	arun	1,528	10,281	305	56,535	37	0			1,927	NA	9dfdeddc72dae	BundleRecommend
	Branch	CONTENT	Spi	Deliver And Save Documents	OR247		27-May-2015 10:38:39	1308, 1359, 1420, 1303,	asavant	1,515	2,339	1,303	10,602	7	2			2,339	NA	903505404414a	OutboundDocumen
	Branch	ORIGINATION	Spi	Submit Create Offer	OR223		27-May-2015 10:40:22	1025, 1271, 1170, 1288,	asavant	1,382	2,008	972	9,537	7	0			2,008	NA	9d35654d4414a	LendingOfferApplic
	Branch	ORIGINATION	Spi	Execute Policies And Create Linkages	-	٠	27-May-2015 11:39:40	1396, 1421, 1025, 748, 2	arun	1,352	2.320	748	10.817	8	0		-	2.320	NA	ffa7b029b81303	CreditDecisionAppl
	Branch	ORIGINATION	Spi	Construct Offer Document Linkage DTO	OR247		27-May-2015 10:38:40	1010, 1070, 926, 886, 1294	asavant	1,002	1,294	828	7,015	7	0			1,294	NA	903505404414a	LendingOfferApplic
	Branch	ORIGINATION	Spi	Inquire Detailed Application	OR223	٠	27-May-2015 10:39:28	383, 343, 333, 618, 3891	asavant	603	3.891	332	16,270	27	0	-	-	3,891	NA	963565464414a	BaseApplicationSe
	g Level Host:																				•

The table below explains each column of the table present in the given snapshot.

Sr. no.	Column Name	Description
1	Alert	Alert state of the transaction Valid Values: BLANK: No alert, Warning: Alert in past (default 5 minutes), Critical: Alerted Transaction
2	Channel	Channel through which the transaction occurred Valid Values: Branch, ATM, and POS.
3	Module	OBEDM module of which transaction is a part
4	Layer	Configured Noun generation layer. Backing Bean for UI and Spi and App Service for Host.
5	Transaction	Name of the transaction
6	Task Code	Task code of the OBEDM page by which the transaction was triggered
7	Trend	Trending of transaction Valid Values: Upwards, Downwards, Neutral
8	Alert Event Time	Time at which last alert occurred for the transaction
9	Trend Reference Queue	Execution time of last n transactions (n=5)
10	Last Alert User	Teller who performed the last alerted transaction
11	Average Time	Average execution time
12	Max Time	Maximum time of execution of the transaction

## Table 4–1 Alert State

Sr. no.	Column Name	Description
13	Min Time	Minimum time of execution of the transaction
14	Total Time	Total time of execution
15	Success Count	Number of times transaction executed successfully
16	Failure Count	Number of times transaction failed.
17	Debit Amount	Amount debited after transaction
18	Credit Amount	Amount credited after transaction
19	Trend Reference	Execution time of last transaction
20	Nested Status	Nested Status
21	Alert ECID	ECID of the last alerted transaction
22	Service	Service name of the transaction
23	Completed Operations	Number of completed transactions
24	Active Threads	Active Threads
25	Max Active Threads	Maximum active threads
26	Host	Host name
27	Process	Process Name
28	Server Name	Server name
29	App Root Type	Root type of noun
30	Failure Security Event	Failure due to security error
31	2FA Event	Authentication error
32	Failure Database Event	Failure due to database error
33	Failure Technical Event	Failure due to technical error
34	Failure Outbound Event	Failure due to outbound call (call outside OBEDM)

One can select any of the task code which opens a popup with information about that task code only.

## Figure 4–7 Select Task Code

NUS PL	ATFORM	Posting Date	e 31-Aug	2016									i	• ※	4 <b>*</b>	▼ amrit	•
	Account 👻	Back Office	CA	SA 👻 🛛 C	Collection 🔻 C	redit Card 🔻	Insurance 👻 LCM	▼ Loa	n 🔻	Origination	▼ Party	▼ Pa	ayment And Collection 👻	Term Deposit	▼ Fas	t Path	
⊾ [	OPA <u>0</u> 01 ×	1												-			
	Applicat	tion Performanc												×			
	л дррнса	aont enormane		<b>OR22</b>	3											🖨 Print	Evit
				10	Det											E rim	E CAR
				View 🔻	Module		Transaction	A	Max	Min	Success	E alloura	Trend Reference Queue				
				Channel		Layer	Submit Create	Average			7	r allure		Time	in millisecor	ıds	
lert	Channel	Module	Layer	Branch	ORIGINATION	Spi	Offer	1,362	2,006	972	/	0	1025, 1271, 1170, 1288, 2				
				Branch	ORIGINATION	Spi	Inquire Detailed Application	603	3,891	332	27	0	383, 343, 333, 618, 3891	e Max	Min	Total	SI
Δ	Branch	ORIGINATION	Spi	Branch	ORIGINATION	Spi	Fetch Application Approval Data	319	860	206	25	0	206, 375, 307, 320, 525	3,891	332	16,270	27 *
<u>^</u>	Branch	SMS	App Se	Branch	ORIGINATION	Spi	Inquire Offer	148	701	39	27	0	63, 145, 169, 306, 701	1,523	146	16,796	31
<u>*</u>	Branch	PRICING	Spi				Documents Fetch Offer Expiry					-		893 860	140 206	1,033	2
<u>.</u>	Branch	WORKLIST	Spi Spi	Branch	ORIGINATION	Spi	For Application	112	249	74	13	0	100, 96, 84, 81, 249	711	59	7,900	36
Ā	Branch	WORKLIST	Spi	Branch	COMMON	Spi	Fetch State	45	256	23	137	0	157, 79, 243, 256, 106	698	19	5.503	35
ē	Branch	ORIGINATION	Spi											562	51	1,215	8
4	Branch	ORIGINATION	Spi											701	39	3,988	27
8	Branch	ORIGINATION	Spi										OK Cano	el 587	64	1,175	8
	Branch	ORIGINATION	Spi		Fetch Offer Expiry	For Application	OR223	27-1	Aay-2015	10:39:28 1	00, 96, 84, 8	1, 249	asavant 11	2 249	74	1,450	1: *

## **Detailed Transaction View**

This section gives the detailed view of a selected transaction. The desired transaction can be selected from the table (metric table). Click on any row to display a detailed view of the transaction.

Figure 4–8 Selection of Desired Transaction

											🗎 Print	🙁 E
Inquire Detailed Application (Spi C	RIGINATION OR:	23)										
	erver Name	Trend	Trend Reference Queue	Last Alert User	Average	Max	Min	Active	Transac	tion Count		
		Trend		Last Alert User				Threads	Success	Failure		
	ost_Server	•	383, 343, 333, 618, 3891	asavant	603	3,891	332	0	27	0		
▲ Transaction Details					∡ Tra	nsaction Metr	ics					
(	hannel BRN				^			Average 60	3			í
Tas	k Code OR223							Max 3,8	91			- 1
	Service BaseApplic	ationServic	eSpi.inquireDetailedApplication	on				Min 33	2			- 1
Tran	saction Inquire Det	ailed Applic	ation					Success 27				
Alert and Trend Details					.∡ Fai	ure Events						
Last A	ert User asavant						Failure Secu	ity Event 0				í
Alert Ev	ent Time 27-May-20	15 10:39:2	6				2	FA Event 0				- 1
Trend Defense	e Queue 383 343	222 640 2	904				Failure Databa	Europa A				- 1

Figure 4–9 Transaction Details	Figure	4–9	Transaction	Details
--------------------------------	--------	-----	-------------	---------

Transaction Details	
Channel	BRN
Task Code	OR223
Service	${\tt BaseApplicationServiceSpi.inquireDetailedApplication}$
Transaction	Inquire Detailed Application
App Root Type	Transaction
Host	ofss3121059.in.oracle.com
Server Name	Host_Server
Process	obphost_server1:8001

Figure 4–10 Transaction Metrics

Transaction Metrics		
Ave	rage	603
	Max	3,891
	Min	332
Succ	ess	27
Success	27	
Failure	0	
Active Threads	0	
Max Active Threads	1	

Figure 4–11 Alert and Trend Details

▲ Alert and Trend Details	
Last Alert User	asavant
Alert Event Time	27-May-2015 10:39:26
Trend Reference Queue	383, 343, 333, 618, 3891
Alert ECID	9d35654d4414a931:-6e0ab1f:14d8b6681e1:-8000-00000000000d612

#### Figure 4–12 Failure Events

Failure Events		
Failure Security Event	0	
2FA Event	0	
Failure Database Event	0	
Failure Technical Event	0	
Failure Outbound Event	0	

#### Configurations

The below mentioned configurations can be made in DMSConfig.properties:

- Channel Status: Number of alerts for which the channel shows 'Critical and 'Warning' status can be configured
- Alert Status: The time after which a 'Critical' alert changes to 'Warning' is configurable
- Initial Page Size: Every time host data is fetched only rows equal to page size are displayed. The
  page size is configurable

These configurations can be made in DMSConfig.properties.

# **5 Transparent Data Encryption (TDE)**

This chapter describes the configuration, installation, and policy setup of Transparent Data Encryption (TDE).

Transparent Data Encryption is a technology used to encrypt database files. This feature enables you to protect sensitive data in database columns stored in operating system files by encrypting it. Then, to prevent unauthorized decryption, it stores encryption keys in a security module external to the database.

# 5.1 Configuration

The following is the classification of information related to OBEDM. This information is used to drives TDE configuration.

Classification	Details	Access and Distribution	Action
Public	This information is not sensitive, and there is no value with it remaining confidential to Bank.	No restrictions	No Encryption
Confidential Internal	It is important that this information remains confidential to Bank.	May be accessed by and distributed to all support person. Distribution to third parties must be authorized by the information owner and requires that an appropriate confidential disclosure agreement be in place.	No Encryption
Confidential Restricted	It is very important that this information remains confidential to Bank and that access within bank is restricted on a need-to- know basis.	Internal access/distribution must be on a business need-to-know basis. Not authorized for information unless the information is encrypted using Oracle-approved encryption.	Need to set encryption rule during TDE
Confidential Highly Restricted	It is essential that this information remains confidential to Bank and that access within bank is restricted on a need-to- know basis.	Internal access/distribution must be very limited and is on a stringent business need-to-know basis. Not authorized for information unless the information is encrypted using Oracle-approved encryption.	Need to set encryption rule during TDE

Table 5–1 TDE Configuration

All tables in OBEDM are classified based on above classification and columns of those tables are marked based on sensitivity.

# 5.2 Installation

This section explains the installation process.

## 5.2.1 Prepare Scripts to Encrypt Sensitive Data

Database administrator needs to create alter script to encrypt sensitive data. The utility tool (obpencryption.sh) is used to create this alter script for TDE. To run the tool, the following prerequisites are required.

#### Prerequisites

- Create a folder "obpencryption" where user wants to run the tool.
- Upload Sensitive\_Data\_List.xlsx, obp-encryption-script-gen.jar, obpencryption.sh, DB\_ RESOURCEBUNDLE.properties. These files are available in maskingencryption.zip. The maskingencryption.zip is part of host.zip available in installer.
- Update database details in DB\_RESOURCEBUNDLE.properties file before running the script.
- Update value "encryptLocation" variable with obp encryption path in obpencryption.sh at line 6.

For example: encryptLocation="/scratch/app/product/obpencryption"

#### **Run Encryption Tool**

 Create update scripts for all the tables containing sensitive data. Run obpencryption.sh with TDE and ENCRYPT.

For example: /obpencryption.sh TDE ENCRYPT

## 5.2.2 Create TDE Keystore

Perform these steps to create keystore which is required for encryption and decryption. Perform the following steps.

Create keystore location with mkdir -p <location>.

For example: mkdir -p /scratch/app/admin/TDE/encryption keystore/

Log in to database with sysdba.

For example: sqlplus / as sysdba

- Run the following sql instruction:
  - ADMINISTER KEY MANAGEMENT CREATE KEYSTORE '{Keystore loaction}' IDENTIFIED BY {Password}

For example: SQL>ADMINISTER KEY MANAGEMENT CREATE KEYSTORE
'/scratch/app/admin/TDE/encryption\_keystore/' IDENTIFIED BY
myPassword

 ADMINISTER KEY MANAGEMENT SET KEYSTORE OPEN IDENTIFIED BY welcome1 CONTAINER=ALL;

For example: SQL>ADMINISTER KEY MANAGEMENT SET KEYSTORE OPEN IDENTIFIED
BY welcome1 CONTAINER=ALL;

 ADMINISTER KEY MANAGEMENT CREATE KEY using tag 'KEY5' IDENTIFIED BY welcome1 WITH BACKUP CONTAINER =all; For example: SQL>ADMINISTER KEY MANAGEMENT CREATE KEY using tag 'KEY5' IDENTIFIED BY welcome1 WITH BACKUP CONTAINER =all;

 ADMINISTER KEY MANAGEMENT SET KEY using tag 'KEY5' IDENTIFIED BY welcome1 WITH BACKUP CONTAINER=ALL

For example: SQL>ADMINISTER KEY MANAGEMENT SET KEY using tag 'KEY5' IDENTIFIED BY welcome1 WITH BACKUP CONTAINER=ALL;

Check the encryption keys generated.

For example: SQL> SELECT con id, key id FROM v\$encryption keys;

Check the wallet status.

For example: SQL> SELECT \* FROM v\$encryption\_wallet;

#### 5.2.3 Edit sqlnet.ora file

Perform this step to enter the TDE wallet location.

- Take a backup of sqlnet.ora file before update for TDE.
- Add entries of sqlnet.ora file as follows:

```
ENCRYPTION_WALLET_LOCATION =
(SOURCE =(METHOD = FILE)(METHOD_DATA =
(DIRECTORY = {Keystore location})
For example:ENCRYPTION_WALLET_LOCATION =
(SOURCE = (METHOD = FILE) (METHOD_DATA =
(DIRECTORY = /scratch/app/admin/TDE/encryption keystore/)
```

### 5.2.4 Run Created Alter Script

- Get TDE\_Encryption.sql script from obpencryption/generatedScript/tde.
- Log in to database.
- Run TDE\_Encryption.sql.

# 6 Masking Customer Private Data

This chapter describes the configuration, installation, and policy setup to mask customer private data categories as sensitive or Personally Identifiable Information (PII).

# 6.1 Configuration

The following is the classification of information related to OBEDM. This information is used to drive TDE configuration.

Classification	Details	Access and Distribution	Action
Public	This information is not sensitive, and there is no value with it remaining confidential to Bank.	No restrictions	No Encryption
Confidential Internal	It is important that this information remains confidential to Bank.	May be accessed by and distributed to all support persons. Distribution to third parties must be authorized by the information owner and requires that an appropriate confidential disclosure agreement is in place.	No Encryption
Confidential Restricted	It is very important that this information remains confidential to Bank and that access within bank is restricted on a need-to-know basis.	Internal access/distribution must be on a business need- to-know basis. Not authorized for information unless the information is encrypted using Oracle-approved encryption.	Need to set encryption rule during masking Tables containing this type of data will be accessed through view for RO user. Synonym needs to be created for the tables and views containing this type of data for RO and ERO user.
Confidential Highly Restricted	It is essential that this information remain confidential to Bank and that access within bank is restricted on a need-to-know basis.	Internal access/distribution must be very limited and is on a stringent business need-to- know basis. Not authorized for information unless the information is encrypted using Oracle-approved encryption.	Need to set encryption rule during masking. Tables containing this type of data will be accessed through view for RO user. Synonym needs to be created for the tables and views containing this type of data for RO and ERO user.

Table	6_1	TDF	Configuration
lable	0-1	IDL	conngaration

All tables in OBEDM are classified based on above classification and columns of these tables are marked based on sensitivity.

# 6.2 Installation

This section explains the installation process.

## 6.2.1 Prepare Scripts to Encrypt Sensitive Data

Database administrator needs to create the following script for masking sensitive data.

- View creation script of the tables containing sensitive data and mask them for RO (Read only) user.
- Synonym creation script of created view of the containing sensitive data for RO (Read only) user.
- Synonym creation script of tables containing sensitive data for ERO (E Read only) user.

The utility tool (obpencryption.sh) is used to create above script. To run the tool, the following prerequisites are required.

#### Prerequisites

- Create a folder "obpencryption" where user wants to run the tool.
- Upload Sensitive\_Data\_List.xlsx, obp-encryption-script-gen.jar, obpencryption.sh, DB\_ RESOURCEBUNDLE.properties. These files are available in maskingencryption.zip. The maskingencryption.zip is part of host.zip available in installer.
- Update database details in DB\_RESOURCEBUNDLE.properties file before running the script.
- Update value "encryptLocation" variable with obp encryption path in obpencryption.sh at line 6.

For example: encryptLocation="/scratch/app/product/obpencryption"

#### Run Encryption Tool for View Creation script and mask data

 Create view creation scripts for all the tables containing sensitive data after mask. Run obpencryption.sh with MASK and VIEWCREATE as parameter.

For example: /obpencryption.sh MASK VIEWCREATE

#### Run Encryption Tool for Synonym Creation script for RO user

 Create synonym creation scripts for all the created containing sensitive data. Run obpencryption.sh with MASK and SYNONYMRO as parameter.

For example: /obpencryption.sh MASK SYNONYMRO

#### Run Encryption Tool for Synonym Creation script for ERO user

 Create synonym creation scripts for all the tables containing sensitive data. Run obpencryption.sh with MASK and SYNONYMEERO as parameter.

For example: /obpencryption.sh MASK SYNONYMERO

## 6.2.2 Create Schema for RO and ERO User

To create schema for RO and ERO user, execute the following steps.

- Create Read-Only (RO) and E Read-Only (ERO) user for accessing masked data from view and table.
- Grant for proper access.

### 6.2.3 Execute Created Scripts through Encryption Tool

Run all created scripts through the encryption tool for the following task.

- Mask sensitive data for RO user.
- Create view for tables contain sensitive data.
- Create synonym to access the view.
- Create synonym to access the table for ERO user.

To do the above tasks, perform the following steps.

- Get all view creation scripts from obpencryption /generatedScript/masking/viewforRO location and run after logging in to database.
- Get synonym creation script (MaskingSynonymForRO.sql) for RO user from obpencryption/generatedScript/masking/synonymForRO and run after logging in to database.
- Get synonym creation script (MaskingSynonymForERO.sql) for ERO user from obpencryption/generatedScript/masking/ synonymForERO and run after logging in to database.

# 7 Configure ODI for Inbound Document Upload

This chapter provides the steps to configure ODI for Inbound Document Upload.

For document upload ODI execution, complete the following configurations:

- 1. Configuring the Input directory:
  - a. For example, if input directory is /scratch/odi/InboundDocument/Upload/lendingZone/
  - b. Update the configuration in the table using the following SQL:

update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set IN\_FILE\_ PATH=/scratch/odi/InboundDocument/Upload/IendingZone/ ' where SUB\_INTERFACE\_ ID='9551';

- c. Note that the SUB\_INTERFACE\_ID='9551' should not be changed.
- 2. Configure the Schema directory:
  - a. Provide the directory where all the schemas are present.

Framework configuration:

update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set SCHEMA\_FILE\_PATH = '/scratch/odi/InboundDocument/Upload/schema/' where SUB\_INTERFACE\_ID ='7002';

- b. Copy all the schema for ODI mediapack zip from directory schema to the new directory which is configured for framework.
- c. Provide schema file for Document Upload.

update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set schema\_file\_ path='D:\work\odi\inDocUpload\InboundDocument\Upload\schema\scan\_images\_ request.0.1.XSD' where SUB\_INTERFACE\_ID='9551';

3. Configure Temporary directory:

update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set temp\_file\_path= '/scratch/odi/InboundDocument/Upload /lendingZonetmp/' where SUB\_INTERFACE\_ID='9551';

4. Configure Archive directory:

update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set archive\_file\_ path=/scratch/odi/InboundDocument/Upload/archieve/' where SUB\_INTERFACE\_ID='9551';

- 5. Create users in connector: Create two credential maps:
  - oracle.obp.credmap: This has two keys.
    - IPM\_SERVICE: It has the username and password of IPM. It is used to upload the documents to IPM.
    - OBP\_USER: It is required to make web service call to OBP.

- oracle.odi.credmap
  - SUPERVISOR: It has supervisor username and password.
  - odi\_domain: It has domain username and password.

#### Figure 7–1 Credentials

w 🔻 + Create Map + Create Key 🧪 Edit 💥 Delete Credential Key Name 🕨 🔛 Detach	
Credential	Type Descrip
🔺 👝 oracle.obp.credmap	
◊ IPM_SERVICE	Password
◊ OBP_USER	Password
🔺 👝 oracle.odl.credmap	
◊ SUPERVISOR	Password
♀ odi_domain	Password

6. Provide permission to the java project for fetching the user credentials. Provide read permission to Java binary com.ofss.fc.document.upload.ipm.jar from EM.

#### Figure 7–2 Example of premissions

Create Sy	vstem Grant						
	different types of system policies supported by application server: principal po ase can be either absolute path or relative path.	licy and codebase policy. Principal policy grants permissions and privileg	es to a list of users or roles. Codebase policy grants pe				
Grant To	Codebase •						
* Codebase	* Codebase file /scratch/app/product/fmw/obp/obp.odi.domain/com.ofss.fc.document.upload.ipm.jar						
Permissions							
View 🔻	🕂 Add 🖍 Edit 🗙 Delete 📰 Detach						
Permissi	ion Class	Resource Name	Permission Actions				
java.secu	rity.AllPermission	read	read				
4	۲						

- 7. Configuring IPM URL:
  - a. update FLX\_FW\_ODI\_SUB\_INTERFACE\_TYPE set GEFU\_IN\_FILE\_PATH='http://\${IPM-HOSTNAME}:\${IPM-PORT}/imaging/ws' where SUB\_INTERFACE\_ID='9551';
  - b. Replace \${IPM-HOSTNAME} with IPM Hostname or IP address.
  - c. Replace \${IPM-PORT} with IPM Server port number.
- Configure config/properties/OutboundWebserviceConfig.properties to provide OBP Host web service configuration.
  - a. Replace \${OBP-HOST-IP} with OBP Host IP address or hostname.
  - b. Replace \${OBP-HOST-PORT} with OBP Host managed server port.

9. Provide FJ Connection Details in ODI Topology data server ORACLE\_HOST.

Figure 7–3 Connection details

Designer Topology ×		📀 Start Page 🛛 🔵 ORAG	CLE_HOST ×			
62	<u>-</u>	Test Connection				
Physical Architecture  OBP_FSDF  OBP_OCH  OBP_PMU_SRC  OBP_PMU_TARGET	4	Definition JDBC On Connect/Disconnect Datasources	JDBC Driver: JDBC URL:	oracle.jdbc.OradeDriver jdbc:orade:thin:@10.180.6.102:1521/PDB6102		=
OBP_SRC     ORACLE_CSA     ORACLE_HOST     ORACLE_HOST     OTACLE_HOST     OTACLE_HOST     OTACLE_HOST     OTACLE_HOST	•	Version Privileges Flexfields	Properties		Value	

# **8 Additional Recommendations**

This chapter provides specific recommendations to be considered for implementation:

# 8.1 SOA Related

This section mentions certain recommendations for setting up the properties on SOA server.

## 8.1.1 Enable Auto Purge Job

- Oracle SOA Suite team strongly recommends periodic purging of composite instances. Purge instances as soon as they are available for purge.
- SOA suite 12c comes up with default purge job enabled with retention period of 7 days.
- It is recommended to keep this default job enabled in the production.

#### Figure 8–1 Auto Purge

ORACLE Enterprise Manager Fusion Middleware Control 12c	😸 WebLogic Domain 🔻 🛛 weblogic 🔻 🚥
te soa-Infra e + soa Infrastructure *	Apr 19, 2018 7:52:11 PM GMT+05:30 👈
Auto Purge	
Purge jobs must be run regularly to free up the database from older data associated with flow instances, adapter reports, and fault alerts. It is strongly recommended to enable Auto Purge to ensure an optimal performance of your runtime environment.	
Auto Purge Job SOA Flow Purge Job 1	Apply
Schedule	
Enter a valid calendaring expression. 👔	
* Job Schedule freq=daily; byhou=0; bysecond=0	
Configuration	
* Purge Type SINGLE 🗸	
Retain Data 5 🔺 🗸 days	
Data within this interval ia NOT purged when the job runs	
Batch Size 20000 A V	
More Auto Purge Configuration Properties	

## 8.1.2 Enable Lazy Loading

- 12c supports lazy loading of composites on deployment as well as server startup.
- CompositeLazyDeployment: Loads the composites lazily on deployment.
  - More useful for non-production environments where there is frequent deployment of all the composites.
- CompositeLazyLoading: Loads the composites lazily on server start up.
- It is recommended to keep the default settings unchanged, that is CompositeLazyDeployment as false and CompositeLazyLoading as true in production environment.

- This will reduce the SOA server startup time.
- To confirm the settings, in SOA EM console, go to soa-infra > SOA Administration > Common Properties. Click More SOA Infra Advanced Configuration Properties link.

Figure 8–2 Lazy Loading Settings

soa-infra      # SoA-infra	on widdleware Co	011001120			Apr 19, 2018 7:57:07 PM GNT-	•05:30
tem MBean Browser						
🝸 oracle.as.soainfr 🗞	А	Application Defined M	Beans: SoaInfraConfig:soa-infra		Apply	Rev
Application Defined MBeans	ſ	Information The changes made on this	mbean are not managed by the configuration session. The chan	iges will be	applied immediately. You cannot undo the changes from the Change Center.	(
<ul> <li>im Server: soa_server1</li> <li>im SoalnfraConfig</li> <li>im soa-infra</li> </ul>						
		Name	Description	Access	Value	
		1 AuditConfig	Audit Configuration	RW	javax.management.openmbean.CompositeDataSupport(compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.compositeType=javax.compositeType=javax.management.openmbean.compositeType=javax.compositeType=javax.	m
		2 AuditLevel	Audit level. The possible values are Off, Production and Dev.	RW	Production	
		3 AutodeployDir	The composite auto deployment directory.	RW		
		4 BulkRecoveryConfig	Configuration for bulk recovery of faults.	RW	javax.management.openmbean.CompositeDataSupport(compositeType=javax.management.open	m
		5 CacheConfig	Cache Configuration	RW	javax.management.openmbean.CompositeDataSupport(compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.management.openmbean.compositeType=javax.compositeType=javax.compositeType=javax.compositeType=javax.compositeType=javax.compositeType=javax.compositeType=javax.compositeType=javax.co	m
		6 CallbackServerURL	This URL is sent by the server as part of the asynchronous c	RW		
		7 CompositeLazyDeploym	Flag to indicate whether SOA composites will be lazily loaded	RW	faise	~
		8 CompositeLazyLoading	Flag to indicate whether SOA composites will be lazily loaded	RW	true	~
		9 ConfigMBean	If true, it indicates that this MBean is a Config MBean.	R	true	
			Bean The flag that controls the creation of mbeans to track elapse.	RW	false	$\sim$
		10 CreateWSCallTrackingN	bean The liag that controls the creation of hibeans to track elapse.		Talac.	

# 8.2 BPM Worklist Related

This section mentions certain recommendations on usage of BPM worklist.

## 8.2.1 Disable Claim Action from Task Details Page

- Always claim the task using worklist action menu.
- Claim option is disabled by default inside task details page.
- It can be enabled (configurable), if needed (but not recommended).
- Disabling this option helps to avoid loading of task details page twice, that is before claiming the task and after claiming the task.

	ORACLE' BPM Worklist								
My Task	<s(24) th="" 💥<="" 🔻="" 🕂="" 🥖=""><th>Actions 🔻 🗵 🗵</th><th>🔍 💌 Me &amp; My Group All 🗸 Assigned 🖌 🛐 💺 🔻</th></s(24)>	Actions 🔻 🗵 🗵	🔍 💌 Me & My Group All 🗸 Assigned 🖌 🛐 💺 🔻						
Status 🖻	e title	Reassign							
<b>E</b>	Verify Application APP20	Escalate	mission SUB200620180014610						
	Structure Solution of Len	Suspend	80010612003 and Submission SUB200620180014610						
8-	Overview of Credit Decisi	Start Task	:0180014610						
8-	Offer Letter Acceptance	Claim	0010763001 and Submission SUB200620180014764						
8-	Overview of Credit Decisi	Create To-Do Task	0180014764						
8	Structure Solution of Len		80010761001 and Submission SUB200620180014758						

Figure 8–3 Claim Action

### 8.2.2 Always Open Human Task Details in External Window

- BPM worklist supports two options to display the task details.
  - **Same Window**: Human task details are opened in the same browser window just below the worklist grid.
  - External Window: Human task details are opened in the new browser window (as a child popup).
- It is strongly recommended to make use of **External Window** option.
  - Human task details can be seen in full-screen mode.
  - Avoids unnecessary loading the task details page if user is browsing through the list of human tasks in worklist grid.
- This option can be enabled from worklist administration page.

#### Figure 8–4 Enable External Window option

ORACLE BPM Worklist					🔂 c	ofssuser 1	•
			Administration	Evidence Search	Approval Groups	Task Co	nfiguration
Application Preferences Application Preferences						<u>S</u> ave	Revert *
	Default assignment filter	Me & My Group All					^
	Worklist Action Menu	Show   Hide					
	File Types Allowed for Upload						
	Display task details in external window	Enable O Disable					~