

Alerts and Dashboard User Guide
Oracle FLEXCUBE Universal Banking

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Alerts and Dashboard User Guide

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1 Preface

1.1 Introduction

Welcome to the **Alerts and Dashboard** user guide for Oracle FLEXCUBE Universal Banking - Retail Process Management (RPM) module. This document provides an overview on the **Dashboard** widgets available in RPM and guides you through the various features in dashboards. This document helps you conveniently make use of dashboards.

1.2 Audience

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

1.3 Document Accessibility

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

1.4 Acronyms and Abbreviations

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

Table 1: Acronyms Table

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

1.5 List of Topics

This manual is organized as follows:

Table 2: Topics

Topics	Description
Dashboards	This topic provides Alerts and Dashboard process flow.
List Of Glossary	List of Glossary has the alphabetical list of Functional Activity Codes with page references for quick navigation.

1.6 Related Documents

The related documents are as following:

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

2 Dashboards

2.1 Introduction




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

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

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

Each dashboard has a unique Functional Activity Code; please refer [Section 3 - List of Glossary](#). The access of the dashboard is provided to the individual user either by assigning the specific functional activity code to the role that they belong to or can also be provided by assigning the dashboard functional activity code directly to their User ID. Please refer the **RPM – Configuration** user manual for more details.

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

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

Following is the list of the dashboards currently supported:

- [2.2 My Applications](#)
- [2.3 Application Search](#)
- [2.4 Conversion Analysis](#)
- [2.5 Account Opening Trends](#)
 - [2.5.1 New Savings Account](#)
 - [2.5.2 New Current Account](#)
 - [2.5.3 New Loan Account](#)
- [2.6 Loan Pipeline](#)
- [2.7 Loan Offer Status](#)
- [2.8 Loan Exposure to Collateral](#)

2.2 My Applications

My Application dashboard allows the logged-in bank user, who could be a Relationship Manager, Sales Manager, Loan Officer and so on, to view the details of the applications originated by them.

Pre-requisite

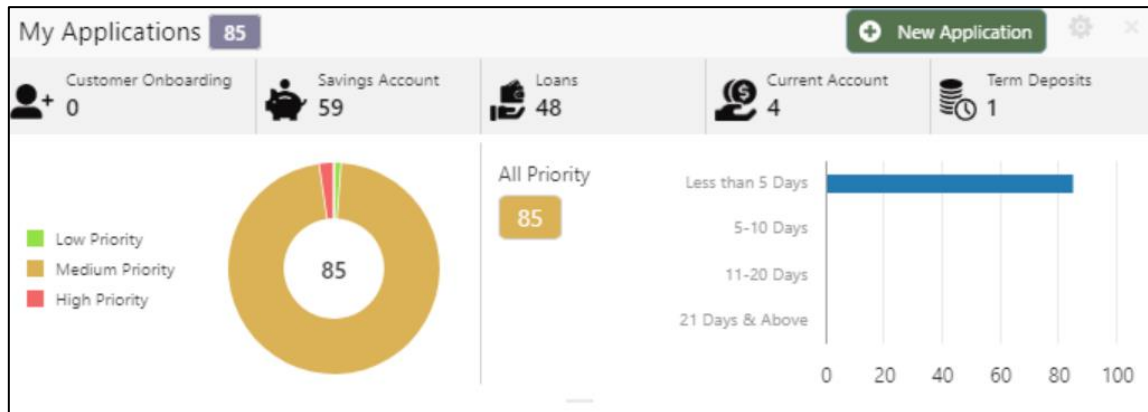
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.

1. From **Home screen** navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **My Applications**.

→ The **My Applications** dashboard is displayed.

A sample screenshot is shown below:

Figure 1: My Applications



For more information on fields, refer to [Table 3: My Applications – Field Description](#).

Table 3: My Applications – Field Description

Field	Description
Customer Onboarding	Displays the total number of new customer onboarding requests initiated in the application.
Savings Account	Displays the total number Saving Accounts requests initiated in the application.
Loans	Displays the total number Loans requests initiated in the application.

Field	Description
Current Account	Displays the total number Current Account requests initiated in the application.
Term Deposits	Displays the total number Term Deposits requests initiated in the application.

Donut view displays the total number of applications initiated by the user, divided into the priorities allocated to the application during initiation.

NOTE: Currently, all the applications are assigned as Medium Priority, by default.

3. Hover on the donut split for the specific priority and click it, the right side screen gets populated with the number for the specified selected priority, with the split of applications into various age buckets as mentioned below:

- Less than 5 Days
- 5-10 Days
- 10-20 Days
- 21 Days & Above

Hyperlinks are available on all the displayed numbers to drill-down and to view the application list.

4. Click on hyperlinked number.
 → The **Application List Drill-Down** screen is displayed.

A sample screenshot is shown below:

Figure 2: Application List Drill-Down

Application Reference Number	Application Date	Customer Name	CIF	Mobile No	Email	Application Process
000APP000001503	26 March 2020	Amy Smith Smith	002942	988866667774	amy@gmail.com	
000APP000001552	26 March 2020	Amy Smith Smith	002942	988866667765	amy@gmail.com	
000APP000001570	26 March 2020	John Smith Smith	002922	911166665774	John.s@hotmail.com	
000APP000001579	26 March 2020	John Smith	002943	928846667774	test@g.com	
000APP000001592	26 March 2020	John Smith Smith	002922	955536667772	john.smith@gmail.com	

The Application List Drill-Down screen displays the list of various applications. For more information on fields, refer to [Table 4: Application List Drill-Down – Field Description](#).

Table 4: Application List Drill-Down – Field Description

Field	Description
Application Reference Number	Displays the application reference number.
Application Date	Displays the application date.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Mobile No	Displays the mobile number.
Email	Displays the Email ID.

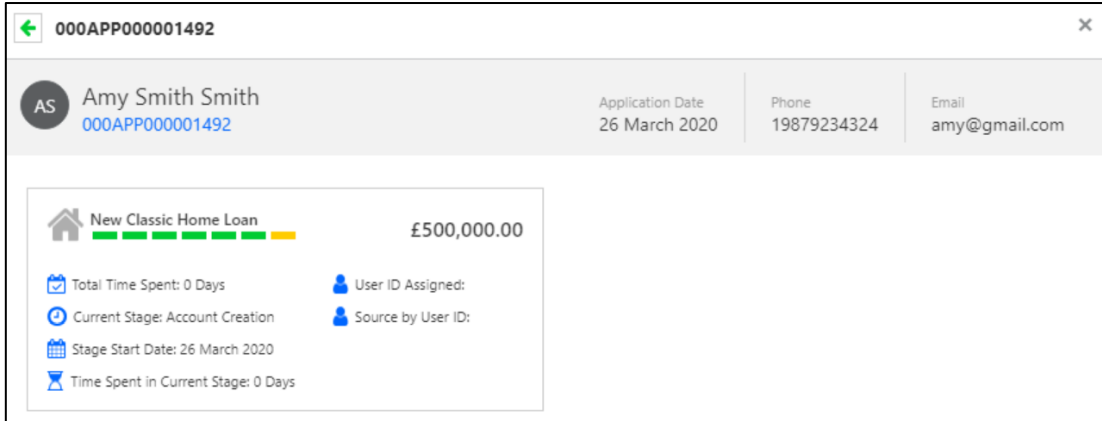
Field	Description
Application Process	Displays the application process.

User can further search a specific application by entering one of the following:

- **Application Number**
 - **CIF**
 - **Customer Name**
 - **Mobile Number**
 - **Email ID**
5. Click the specific application row to view more details about the application.
→ The **Application Details Drill-Down** screen is displayed.

A sample screenshot is shown below:

Figure 3: Application Details Drill-Down



The **Application Details Drill-Down** screen displays separate cards for various products initiated as part of the application. For more information on fields, refer to [Table 5: Application Details Drill-Down – Field Description](#).

Table 5: Application Details Drill-Down – Field Description

Field	Description
Total time spent	Displays the time spent for the product process since initiation of the application.
Current Stage	Displays the stage in which the product process is currently in.
Stage Start Date	Displays the stage in which the product process is currently in.
Time spent in Current Stage	Displays the days spent in the current stage.
User ID Assigned	Displays the User ID of the user currently working on the product process. NOTE: This is blank, in case the product process task is not acquired by any user.
Source By User ID	Displays the user ID of the user who has sourced the application

2.3 Application Search

Application Search dashboard allows the user to enquire an application through the various search criteria based on the following:

- **Application Number**
- **Customer Name**
- **CIF**
- **Mobile Number**
- **Email ID**

Pre-requisite

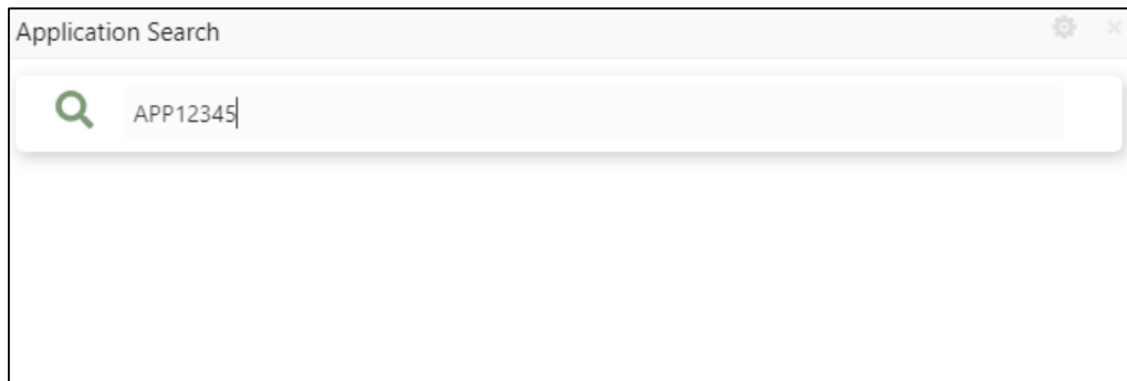
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.

1. From **Home screen** navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **Application Search**.

→ The **Application Search** dashboard is displayed.

A sample screenshot is illustrated below:

Figure 4: Application Search



It allows to view the application list and allows further drill-down to view the application details. Please refer [Section 2.2 My Applications](#), to read more about the Application List Drill-Down screen and Application Details Drill-Down screen.

2.4 Conversion Analysis

Conversion Analysis dashboard allows the logged-in bank user to view the details of the conversion for the various products originated by them.

Pre-requisite

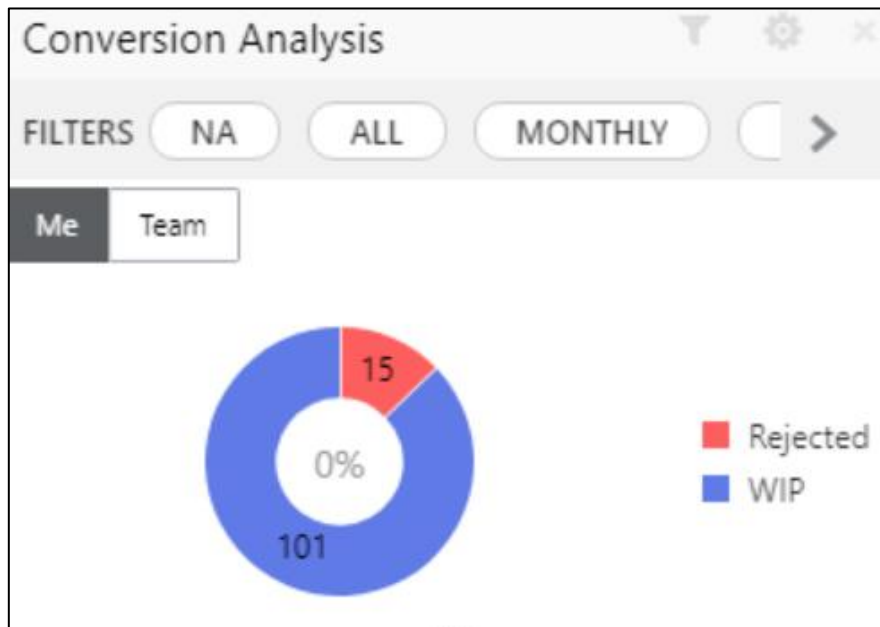
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.


1. From **Home screen** navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **Conversion Analysis**.

→ The **Conversion Analysis** dashboard is displayed.

A sample screenshot is illustrated below:

Figure 5: Conversion Analysis



3. Click  icon to filter the data. Available options are as following:
 - Products
 - Period

By default, the system displays the month-wise conversion details of all the products originated for the current month. This dashboard provides bifurcations across Work-In-Progress (WIP), Completed and Rejected for the products originated.

2.5 Account Opening Trends

Account Opening Trends will have following dashboards:

- [2.5.1 New Savings Account](#)
- [2.5.2 New Current Account](#)
- [2.5.3 New Loan Account](#)

2.5.1 New Savings Account

New Savings Account dashboard allows the logged-in bank user to view the trend of the savings account opened for the specified period.

Pre-requisite

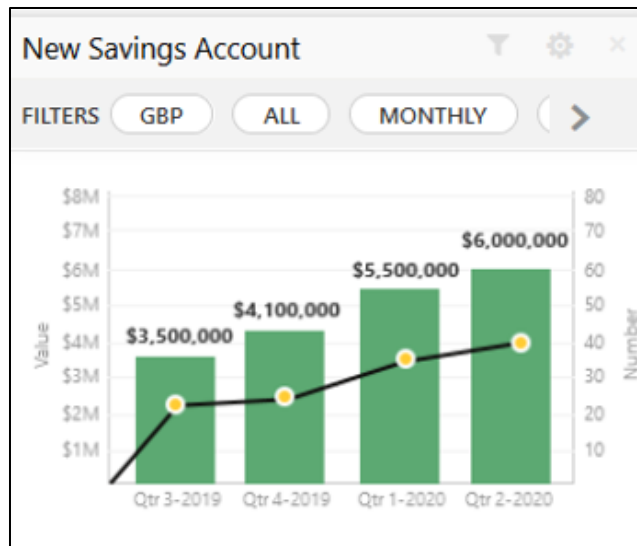
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.


1. From **Home screen** navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **New Savings Account**.

→ The **New Savings Account** dashboard is displayed.


A sample screenshot is illustrated below:

Figure 6: New Savings Account



3. Click  icon to filter the data. Available options are as following:

- Currency
- Period

By default, the system displays month-wise trend of the savings account opened. System allows to expand the dashboard tile by clicking '' icon.

2.5.2 New Current Account

New Current Account dashboard allows the logged-in bank user to view the trend of the current account opened for the specified period.

Pre-requisite

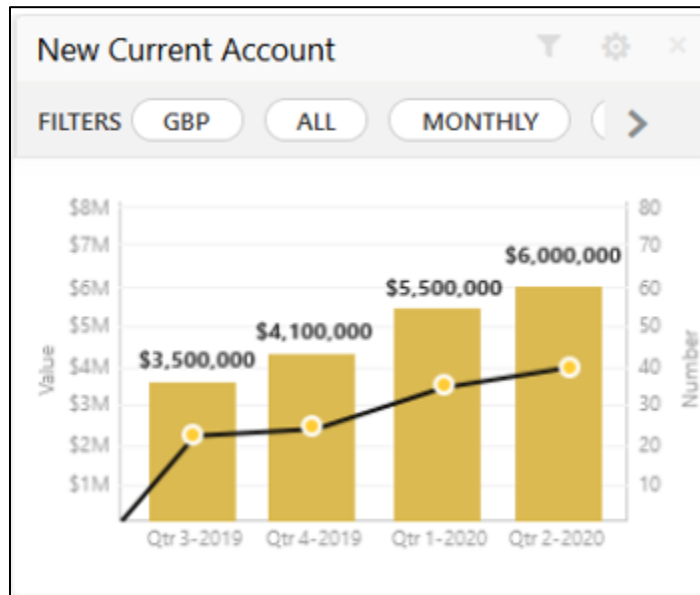
Specify **User Id** and **Password**, and login to **FCUBS Home screen**.


1. From **Home screen** navigate to left menu and click **Dashboard**.
2. **Under Dashboard**, click **New Current Account**.


→ The **New Current Account** dashboard is displayed.

A sample screenshot is illustrated below:

Figure 7: New Current Account



3. Click  icon to filter the data. Available options are as following:
 - Currency
 - Period

By default, the system displays month-wise trend of the current account opened. System allows to expand the dashboard tile by clicking  icon.

2.5.3 New Loan Account

New Loan Account dashboard allows the logged-in bank user to view the trend of the loan account opened for the specified period.

Pre-requisite

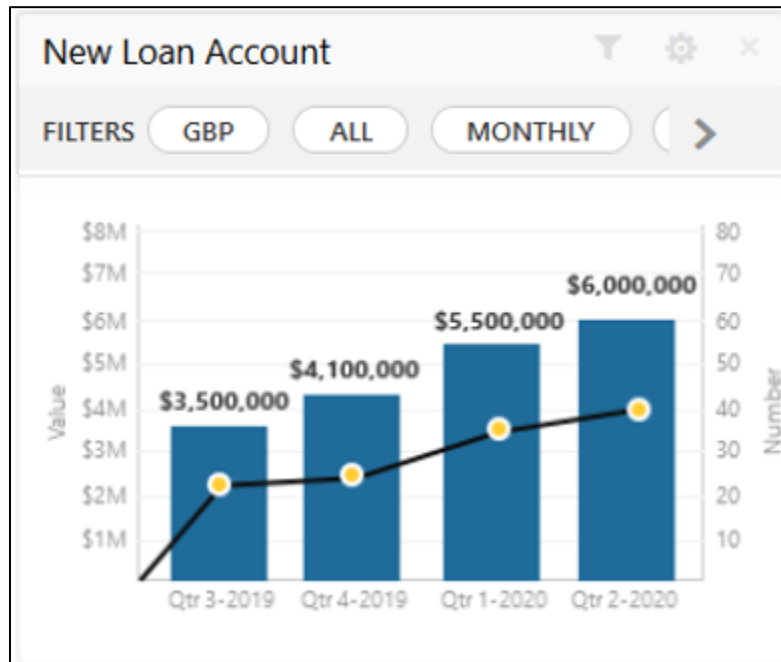
Specify **User Id** and **Password**, and login to **FCUBS Home screen**.

1. From **Home screen** navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **New Loan Account**.

→ The **New Loan Account** dashboard is displayed.


A sample screenshot is illustrated below:

Figure 8: New Loan Account



3. Click  to filter the data. Available options are as following:

- Currency
- Period

By default, the system displays month-wise trend of the current account opened. System allows to expand the dashboard tile by clicking  icon.

2.6 Loan Pipeline

Loan Pipeline dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the stage-wise details of the loans for their branch.

Pre-requisite

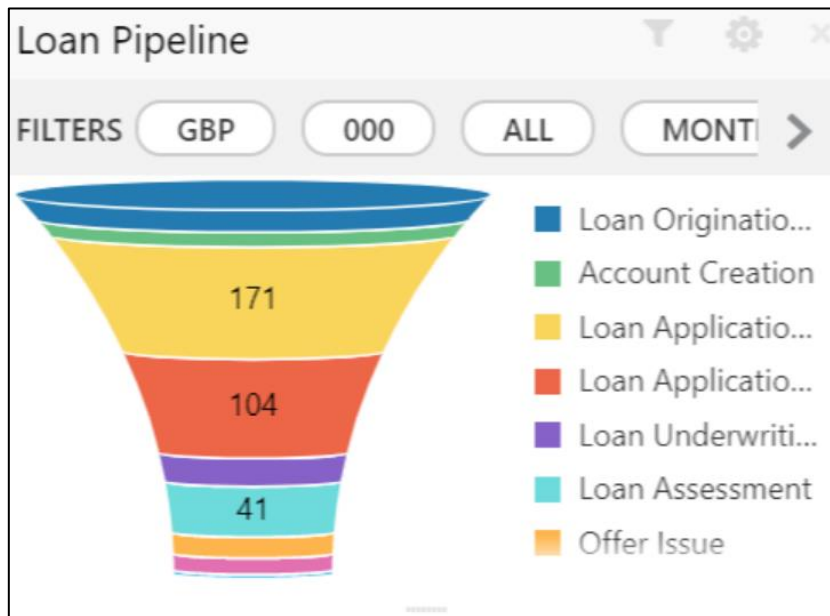
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.


1. From **Home screen**, navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **Loan Pipeline**.

→ The **Loan Pipeline** dashboard is displayed.

A sample screenshot is illustrated below:

Figure 9: Loan Pipeline



3. Click  icon to filter the data. Available options are as following:

- Currency
- Sub-Products
- Period

By default, the system displays the stage-wise details of the loans of the logged-in user for the current month.

2.7 Loan Offer Status

Loan Offer Status dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the status of the loans for which offers have been made for their branch.

Pre-requisite

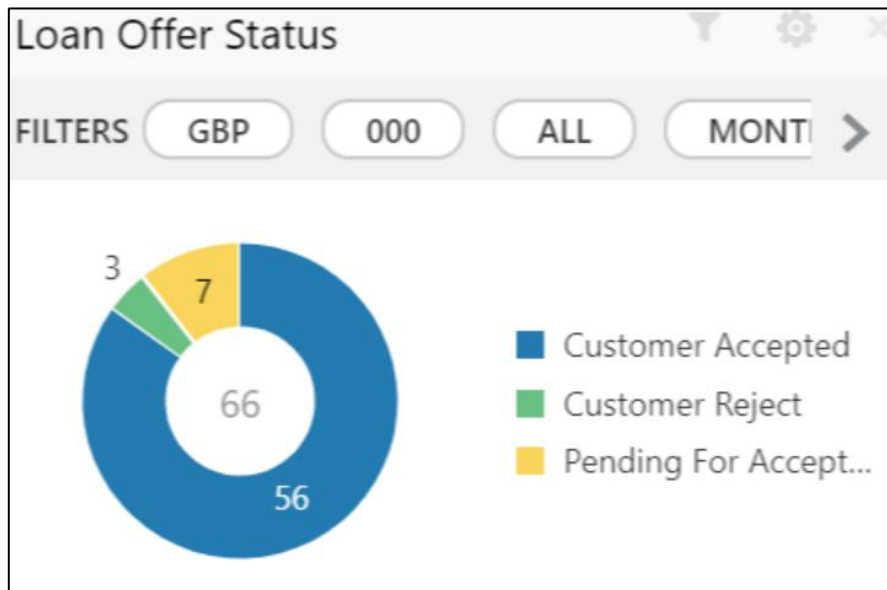
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.

1. From **Home screen**, navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **Loan Offer Status**.

→ The **Loan Offer Status** dashboard is displayed.


A sample screenshot is illustrated below:

Figure 10: Loan Offer Status



In a doughnut chart, the dashboard reveals the numbers and the value of the loan offers for the below mentioned status:

- Pending for Acceptance
- Customer Accepted
- Customer Reject
- Bank Reject

3. Click  icon to filter the data. Available options are as following:

- Currency
- Period

By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

2.8 Loan Exposure to Collateral

Loan Exposure to Collateral dashboard allows the logged-in bank user who could be a Lending Head to view the collaterals available against the Loans status for their Branch.

Pre-requisite

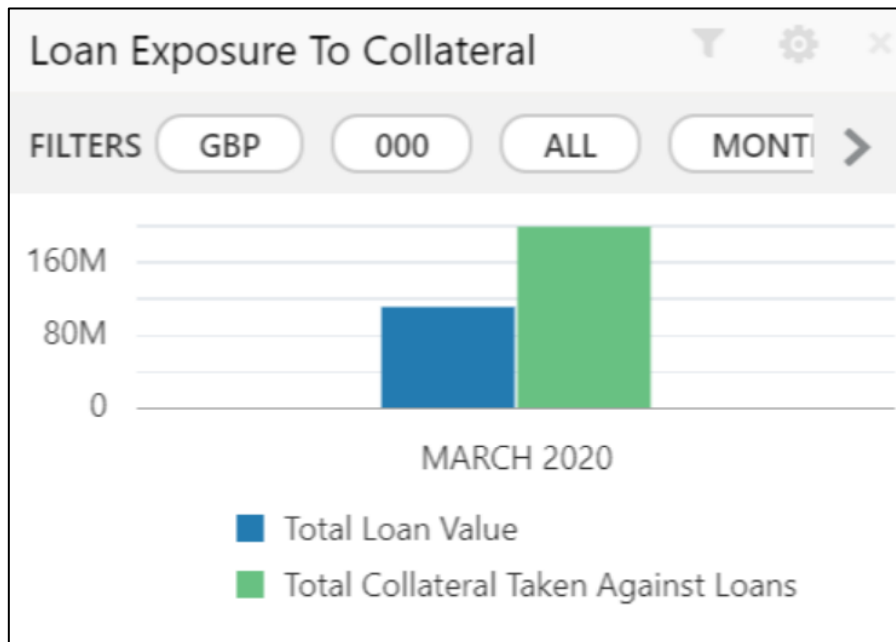
Specify **User Id** and **Password**, and login to FCUBS **Home screen**.

1. From **Home screen**, navigate to left menu and click **Dashboard**.
2. Under **Dashboard**, click **Loan Exposure to Collateral Dashboard**.


→ The **Loan Exposure to Collateral** dashboard is displayed.

A sample screenshot is illustrated below:

Figure 11: Loan Exposure to Collateral



This dashboard displays the Loan Exposure Value against the Collateral Value.

3. Click  icon to filter the data. Available options are as following:
 - Currency
 - Sub-Products
 - Period

By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

3 List Of Glossary

Table 6: Glossary

Functional Activity Code	Dashboard Name
RPM_FA_PROCESS_DRIVER_Dashboard_ACCO UNT_OPENING_TREND	2.5 Account Opening Trends (p.12)
RPM_FA_WD_MY_SEARCH	2.3 Application Search (p.10)
RPM_FA_PROCESS_DRIVER_Dashboard_CONV ERSION_ANALYSIS	2.4 Conversion Analysis (p.11)
RPM_FA_PROCESS_DRIVER_Dashboard_COLL ATERAL	2.8 Loan Exposure to Collateral (p.19)
RPM_FA_PROCESS_DRIVER_Dashboard_LOAN _OFFER_STATUS	2.7 Loan Offer Status (p.17)
RPM_FA_PROCESS_DRIVER_Dashboard_PARK EDLOAN	2.6 Loan Pipeline (p.16)
RPM_FA_DASHBOARD_MY_APPLICATIONS / RPM_FA_PROCESS_DRIVER_Dashboard_MY_A PPLICATION	2.2 My Applications (p.5)