Alerts and Dashboard User Guide

Oracle FLEXCUBE Onboarding

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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 Onboarding. This document provides an overview on the **Dashboard** widgets available in OFLO 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

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

Table 1: Acronyms Table

Abbreviation	Description
OFLO	Oracle FLEXCUBE Onboarding
DS	Data Segment
System	Oracle FLEXCUBE Onboarding Module

1.5 List of Topics

This manual is organized as follows:

Table 2: Topics

Topics	Description
Dashboards	This topic provides the details of Alerts and Dashboard widgets.
Functional Activity Codes - Glossary	Functional Activity Codes - Glossary has the alphabetical list of Dashboard name with page references and Functional Activity Codes for quick navigation.

1.6 Related Documents

The related documents are as follows:

1. Configurations User Guide
2. Operations User Guide
3. Savings Account Origination User Guide
4. Current Account Origination User Guide
5. Term Deposit Origination User Guide
6. Retail Loans Origination User Guide
7. Common Core User Guide

2 Dashboards

2.1 Introduction

Oracle FLEXCUBE Onboarding (OFLO) 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.

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.

Oracle FLEXCUBE Onboarding 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 **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 displays 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.

The list of the dashboards currently supported are as follows:

- 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
    - 2.5.4 New Term Deposits
- 2.6 Loan Pipeline
- 2.7 Loan Offer Status
- 2.8 Loan Exposure to Collateral
- 2.9 Product Application Near Expiry
- 2.10 Loan Offers Near Expiry

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.

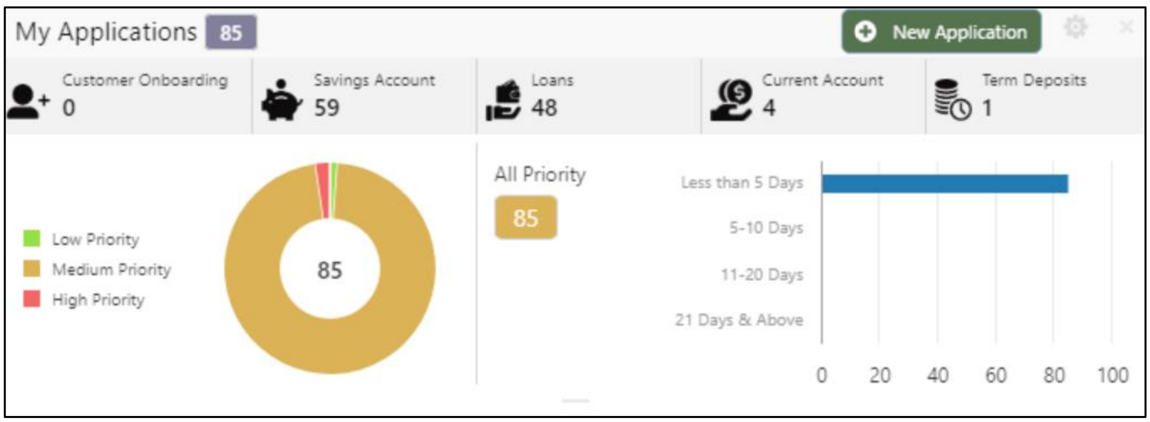
Prerequisite

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

1. From **Home screen,** click **Dashboard**.

→ The **Dashboard** screen is displayed. The **My Applications** dashboard appears in **Dashboard** screen.

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 of Saving Accounts requests initiated in the application.
Loans	Displays the total number of Loans requests initiated in the application.
Current Account	Displays the total number of Current Account requests initiated in the application.

Field	Description
Term Deposits	Displays the total number of 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.

The available priorities are

- High
- Medium
- Low

2. 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:

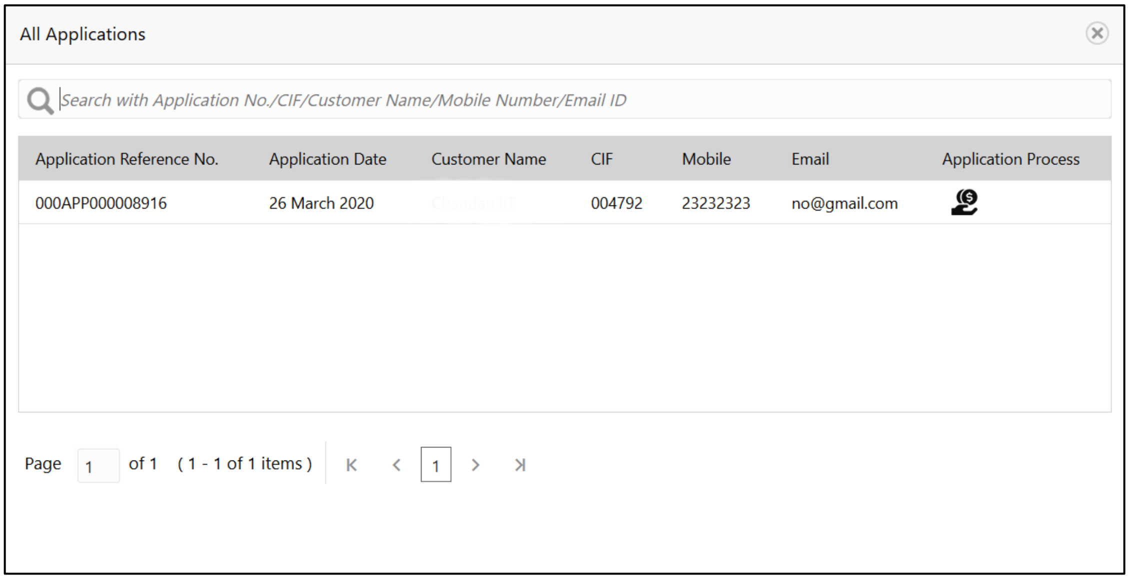
- Less than 5 Days
- 5-10 Days
- 10-20 Days
- 21 Days & Above

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

3. Click on hyperlinked number.

   → The **All Applications Drill-Down** screen is displayed.

Figure 2: All Applications Drill-Down



The **All Applications Drill-Down** screen displays the list of various applications. For more information on fields, refer to Table 4: All Applications Drill-Down – Field Description.

Table 4: All Applications Drill-Down – Field Description

Field	**Description**
Application Reference No.	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.
E-mail	Displays the E-mail ID.
Application Process	Displays the icons representing the Product or Application process.

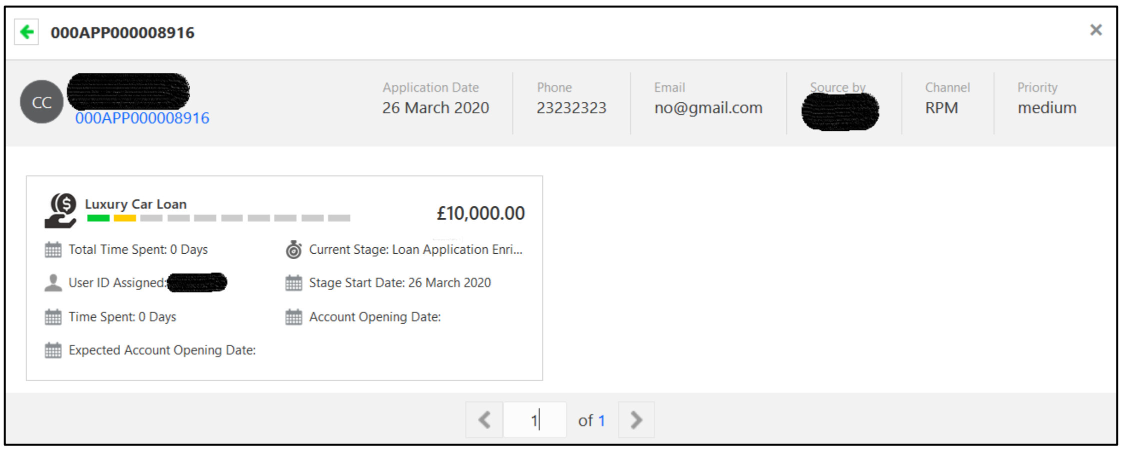
User can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

4. Click the specific application row to view more details about the application.

→ The **Application Details Drill-Down** screen is displayed.

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
Application Date	Displays the application date.
Phone	Displays the phone number.
E-mail	Displays the E-mail ID.
Source By	Displays the username who has sourced the application.
Channel	Displays the channel name.
Priority	Displays the priority of the application. • High • Medium • Low
Total time spent	Displays the time spent for the product process since initiation of the application.
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.
Time spent	Displays the days spent in the current phase/stage.
Expected Account Opening Date	Displays the expected date for the account creation.

Field	Description
Current Stage	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the current stage is displayed as current phase.
Stage Start Date	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date.
Account Opening Date	Displays the account opening date.

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**
- **E-mail ID**

Prerequisite

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

1. From **Home screen,** click **Dashboard**.

   → The **Dashboard** screen is displayed. The **Application Search** dashboard appears in **Dashboard** screen.

   Figure 4: Application Search

2. Click icon.

   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 All Applications 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.

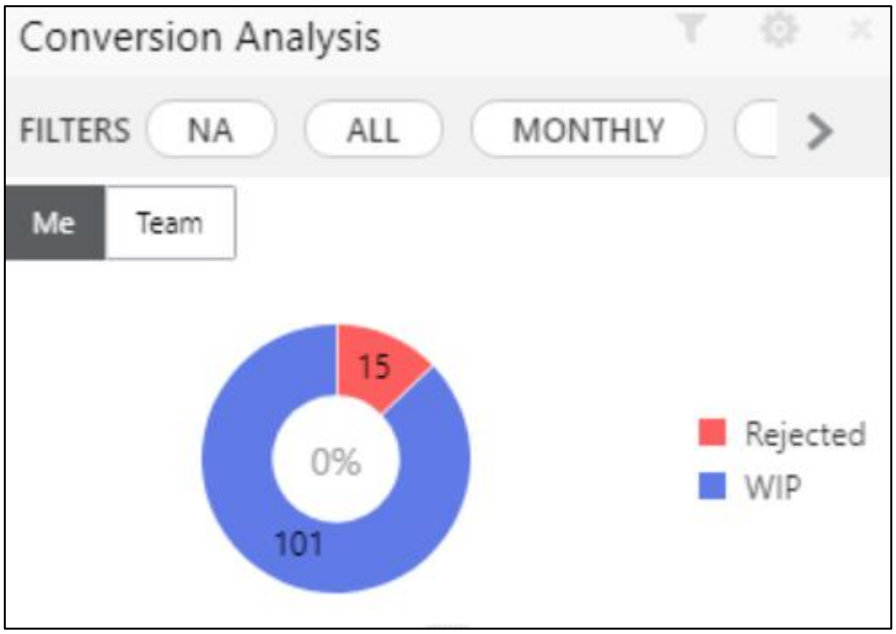
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **Conversion Analysis** dashboard appears in **Dashboard** screen.

Figure 5: Conversion Analysis



2. Click icon to filter the data. The available options are:

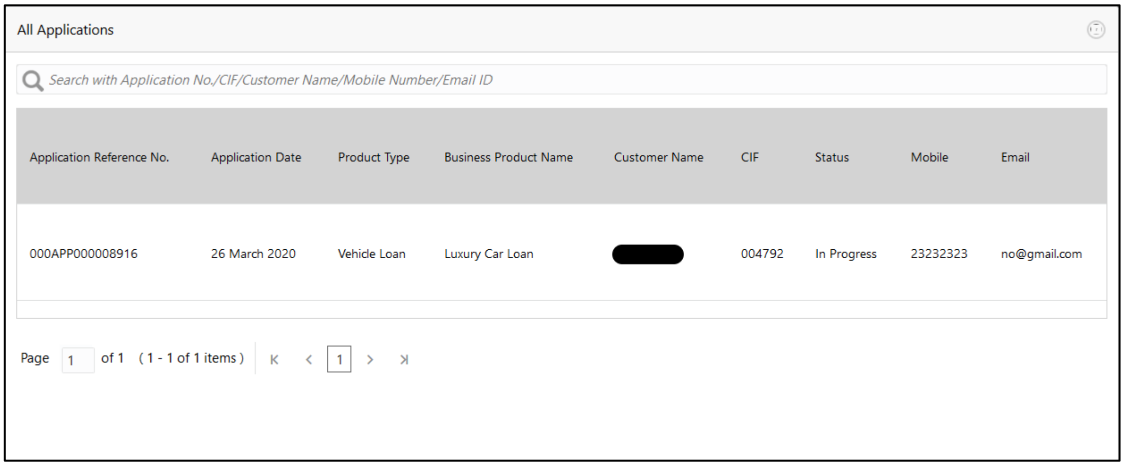
   - Products
   - Period

   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.

3. Click on hyperlinked number.

→ The **All Applications Drill-Down** screen is displayed.

Figure 6: All Applications Drill-Down



The All Applications Drill-Down screen displays the list of various applications for the selected Conversion Status. For more information on fields, refer to Table 6: All Applications Drill-Down – Field Description.

Table 6: All Applications Drill-Down – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Type	Displays the product type.
Business Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Status	Displays the status of the application.

Field	Description
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

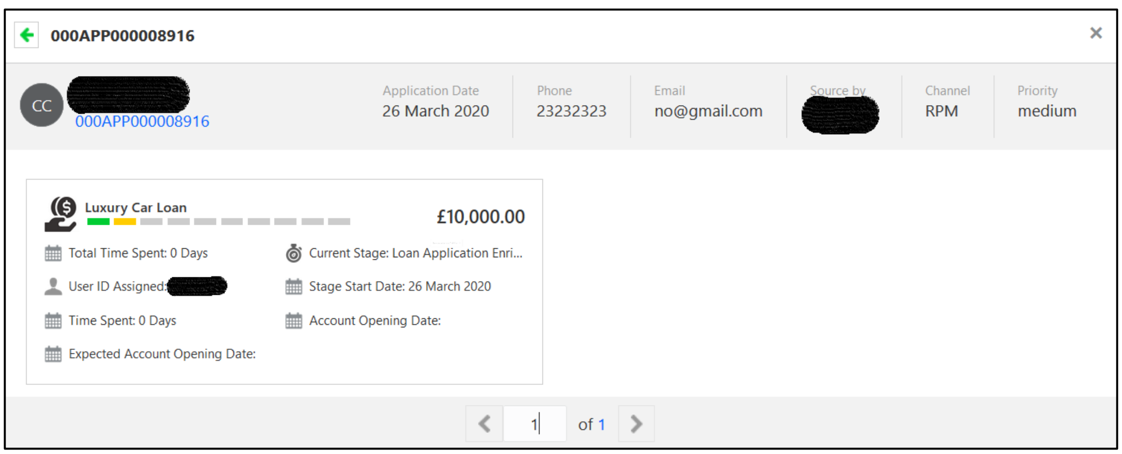
User can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

4. Click the specific application row to view more details about the application.

→ The **Application Details Drill-Down** screen is displayed.

Figure 7: 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 7: Application Details Drill-Down – Field Description.

Table 7: Application Details Drill-Down – Field Description

Field	Description
Application Date	Displays the application date.
Phone	Displays the phone number.
E-mail	Displays the E-mail ID.
Source By	Displays the username who has sourced the application.
Channel	Displays the channel name.
Priority	Displays the priority of the application. • High • Medium • Low
Total time spent	Displays the time spent for the product process since initiation of the application.
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.
Time spent	Displays the days spent in the current phase/stage.
Expected Account Opening Date	Displays the expected date for the account creation.

Field	Description
Current Stage	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the current stage is displayed as current phase.
Stage Start Date	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date.
Account Opening Date	Displays the account opening date.

2.5 Account Opening Trends

Account Opening Trends has the following dashboards:

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.

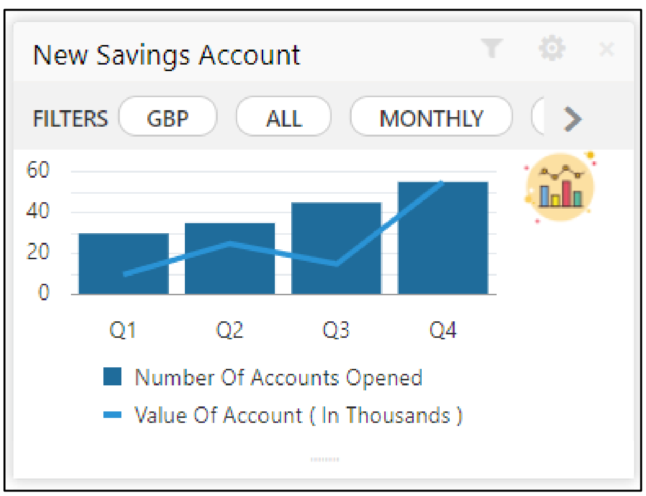
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **New Savings Account** dashboard appears in **Dashboard** screen.

Figure 8: New Savings Account



2. Click icon to filter the data. The available options are:
    - Currency
    - Period

    By default, the system displays month-wise trend of the savings account opened.

3. Click to change the chart type.
4. Click icon to expand the dashboard.

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.

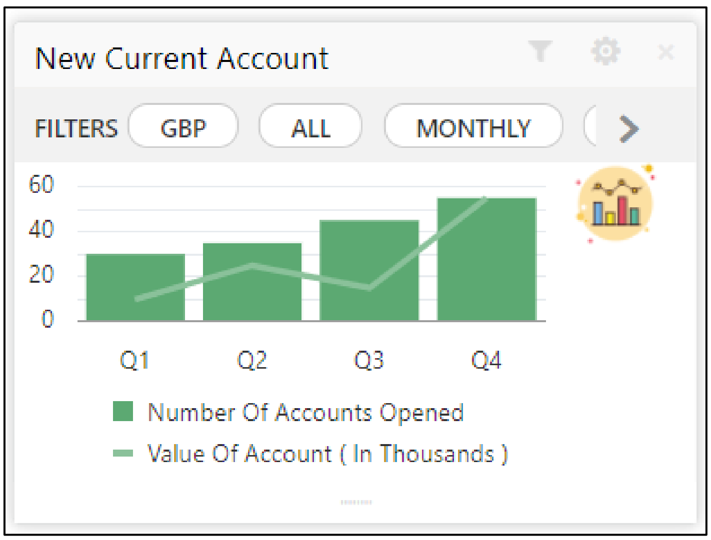
Prerequisite

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

1. From **Home screen,** click **Dashboard**.

   → The **Dashboard** screen is displayed. The **New Current Account** dashboard appears in **Dashboard** screen.

   Figure 9: New Current Account



2. Click icon to filter the data. The available options are:
   - Currency
   - Period

   By default, the system displays month-wise trend of the current account opened.

3. Click to change the chart type.
4. Click icon to expand the dashboard.

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.

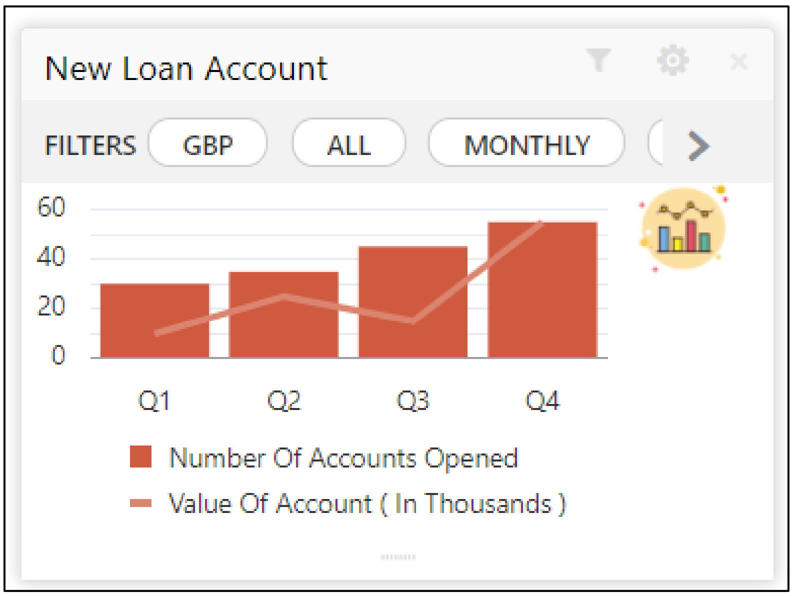
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **New Loan Account** dashboard appears in **Dashboard** screen.

Figure 10: New Loan Account



2. Click to filter the data. The available options are:
   - Currency
   - Period

   By default, the system displays month-wise trend of the loan account opened.

3. Click  to change the chart type.
4. Click  icon to expand the dashboard.

2.5.4 New Term Deposits

New Term Deposits dashboard allows the logged-in bank user to view the trend of the term deposit account opened for the specified period.

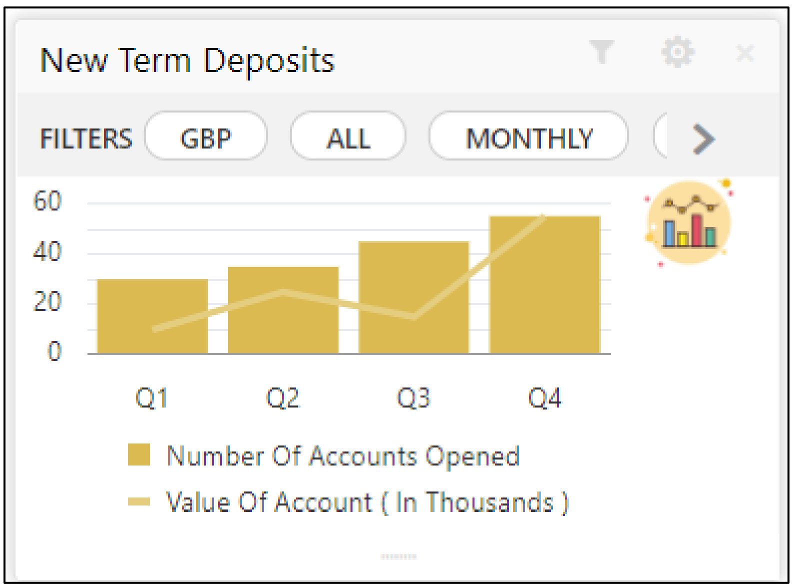
Prerequisite

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

1. From **Home screen,** click **Dashboard**.

   → The **Dashboard** screen is displayed. The **New Term Deposits** dashboard appears in **Dashboard** screen.

   Figure 11: New Term Deposits



2. Click to filter the data. The available options are:
   - Currency
   - Period

   By default, the system displays month-wise trend of the current account opened.

3. Click to change the chart type.
4. Click icon to expand the dashboard.

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.

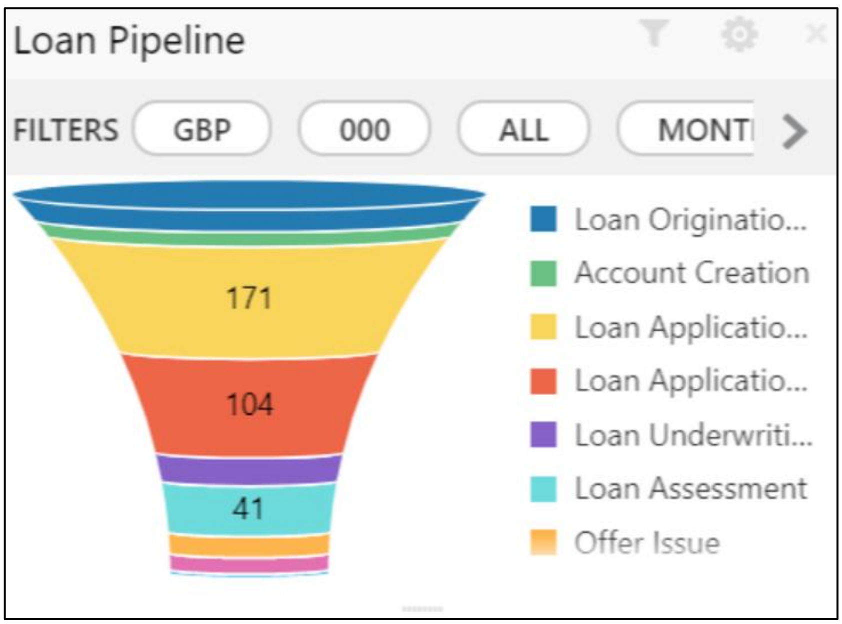
Prerequisite

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

1. From **Home screen**, click **Dashboard.**

   → The **Dashboard** screen is displayed. The **Loan Pipeline** dashboard appears in **Dashboard** screen.

Figure 12: Loan Pipeline



2. Click icon to filter the data. The available options are:

   - 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.

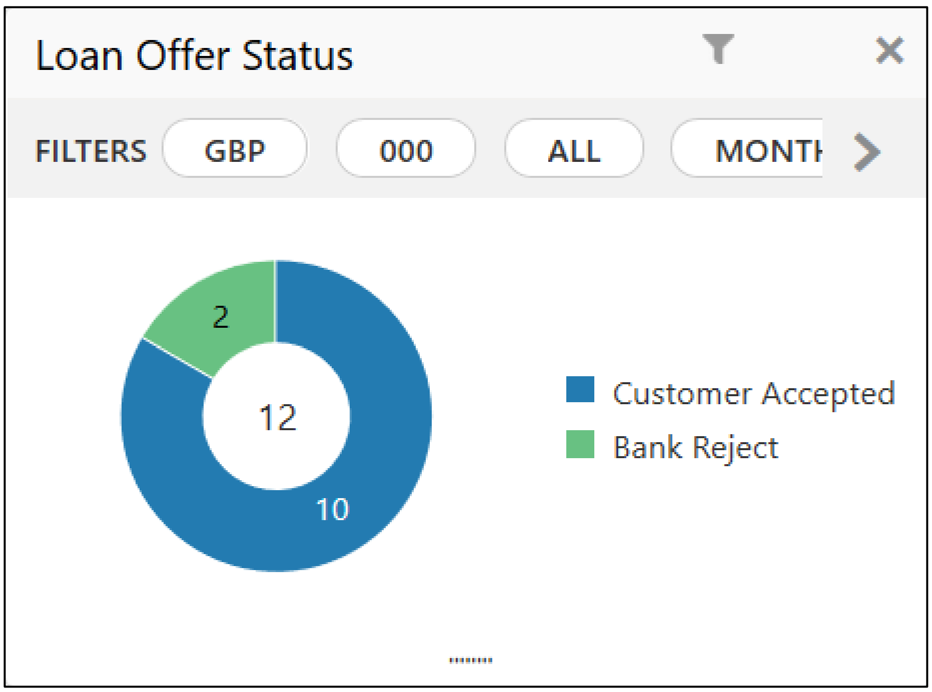
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

→ The **Dashboard** screen is displayed. The **Loan Offer Status** dashboard appears in **Dashboard** screen.

Figure 13: 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

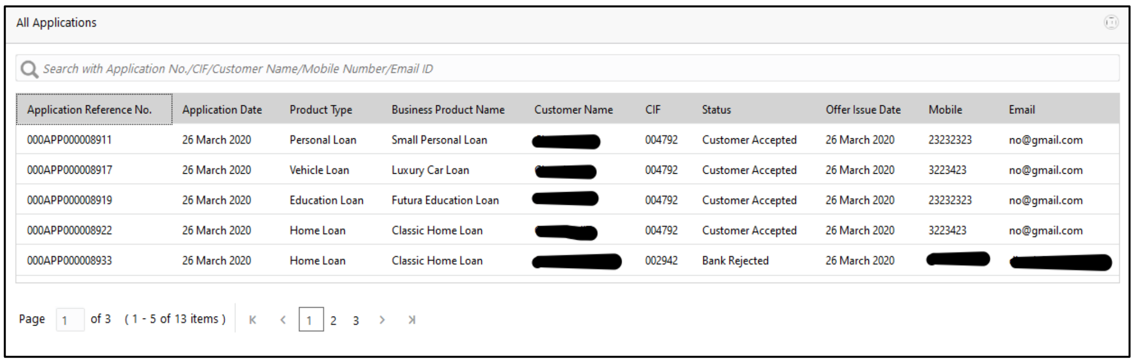
2. Click icon to filter the data. The available options are:
   - Currency
   - Period

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

3. Click on hyperlinked number.

   → The **Loan Offer Status Drill-Down** screen is displayed.

Figure 14: Loan Offer Status Drill-Down



All Applications

Search with Application No./CIF/Customer Name/Mobile Number/Email ID

Application Reference No.	Application Date	Product Type	Business Product Name	Customer Name	CIF	Status	Offer Issue Date	Mobile	Email
000APP000008911	26 March 2020	Personal Loan	Small Personal Loan	[redacted]	004792	Customer Accepted	26 March 2020	23232323	no@gmail.com
000APP000008917	26 March 2020	Vehicle Loan	Luxury Car Loan	[redacted]	004792	Customer Accepted	26 March 2020	3223423	no@gmail.com
000APP000008919	26 March 2020	Education Loan	Futura Education Loan	[redacted]	004792	Customer Accepted	26 March 2020	23232323	no@gmail.com
000APP000008922	26 March 2020	Home Loan	Classic Home Loan	[redacted]	004792	Customer Accepted	26 March 2020	3223423	no@gmail.com
000APP000008933	26 March 2020	Home Loan	Classic Home Loan	[redacted]	002942	Bank Rejected	26 March 2020	[redacted]	[redacted]

Page 1 of 3 (1 - 5 of 13 items) 1 2 3

The Loan Offer Status Drill-Down screen displays the list of various Loan applications. For more information on fields, refer to Table 8: Loan Offer Status Drill-Down – Field Description.

Table 8: Loan Offer Status Drill-Down – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Type	Displays the sub-product type.
Business Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.

Field	Description
Status	Displays the status of the application.
Offer Issue Date	Displays the offer issue date.
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

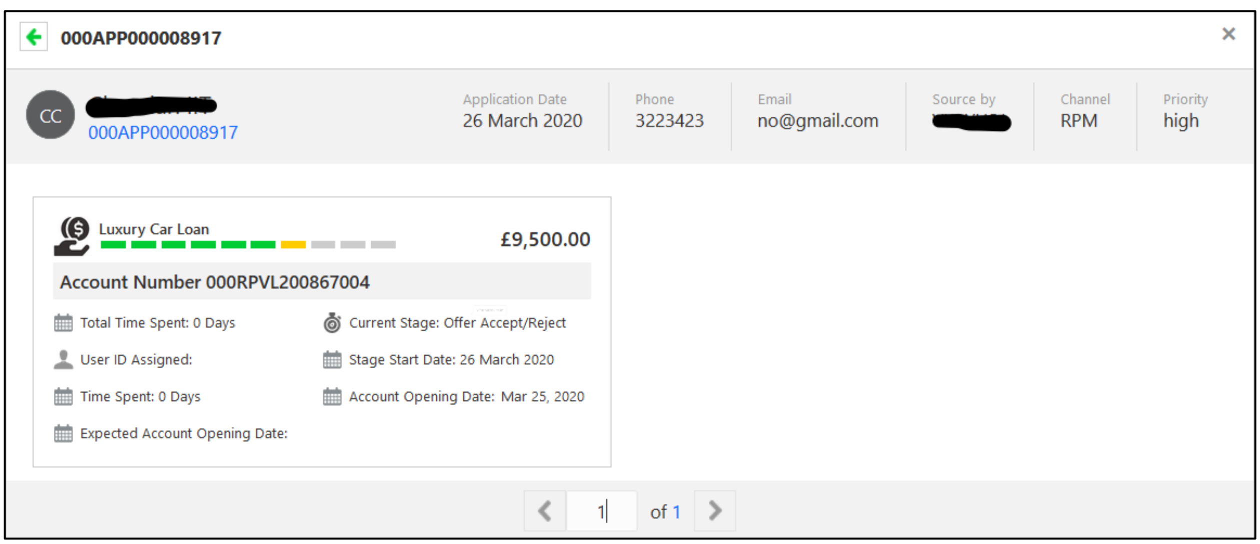
User can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

4. Click the specific application row to view more details about the application.

→ The **Application Details Drill-Down** screen is displayed.

Figure 15: 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 9: Application Details Drill-Down – Field Description.

Table 9: Application Details Drill-Down – Field Description

Field	Description
Application Date	Displays the application date.
Phone	Displays the phone number.
E-mail	Displays the E-mail ID.
Source By	Displays the username who has sourced the application.
Channel	Displays the channel name.
Priority	Displays the priority of the application. • High • Medium • Low
Application Number	Displays the application number
Total time spent	Displays the time spent for the product process since initiation of the application.
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.
Time spent	Displays the days spent in the current phase/stage.

Field	Description
Expected Account Opening Date	Displays the expected date for the account creation.
Current Stage	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the current stage is displayed as current phase.
Stage Start Date	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date.
Account Opening Date	Displays the account opening date.

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 Exposures for their Branch.

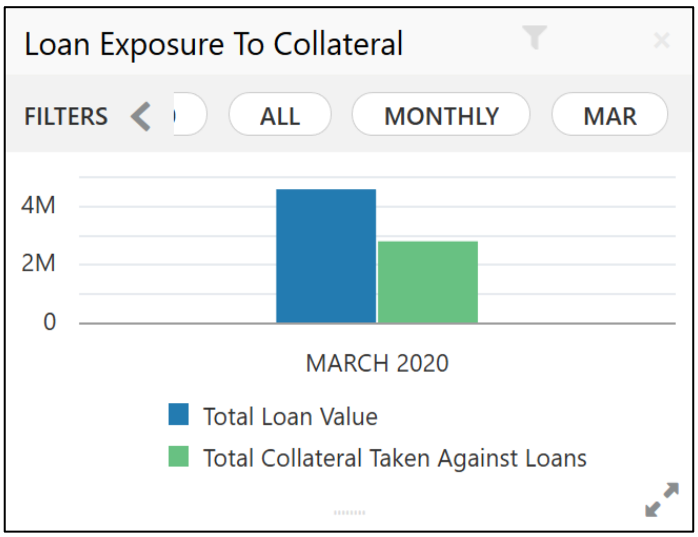
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **Loan Exposure to Collateral** dashboard appears in **Dashboard** screen.

   Figure 16: Loan Exposure to Collateral



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

2. Click icon to filter the data. The available options are:
   - 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.

2.9 Product Application Near Expiry

Product Application Near Expiry dashboard allows the logged-in bank user to view the details of applications which are nearing to expiry date.

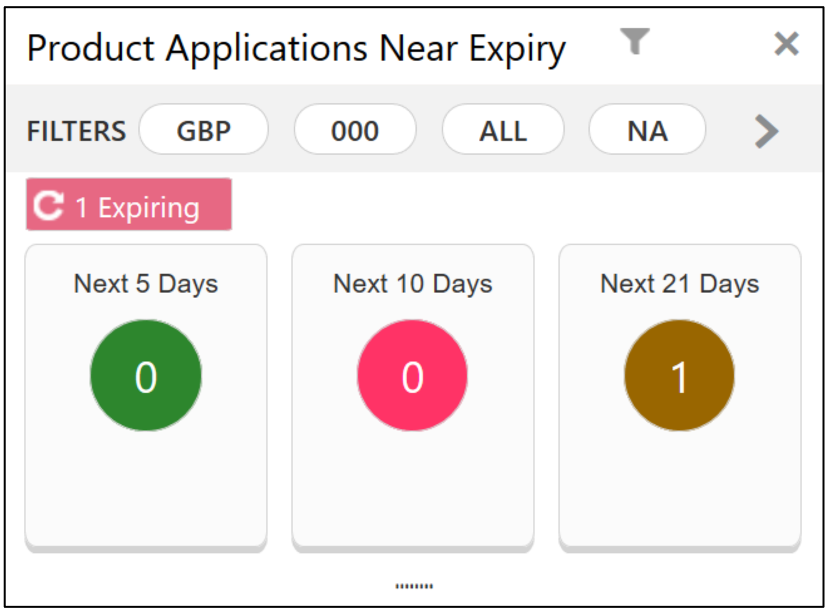
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **Product Application Near Expiry** dashboard appears in **Dashboard** screen.

Figure 17: Product Application Near Expiry



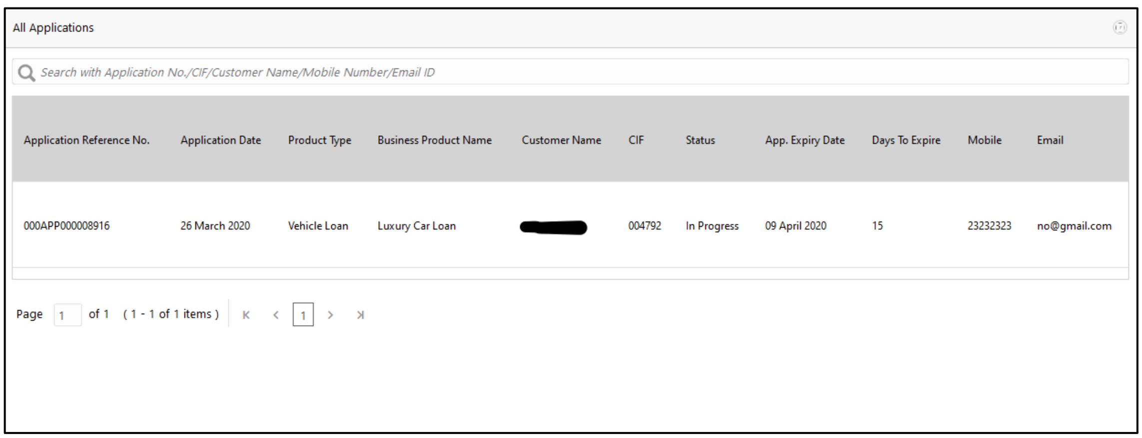
2. Click icon to filter the data. The available options are:
   - Currency
   - Branch
   - Users
   - Products
   - Sub-Products

   By default, the system displays the details of all the products, the base currency and the branch of the logged-in user.

3. Click on hyperlinked number.

   → The **Product Application Near Expiry Drill-Down** screen is displayed.

Figure 18: Product Application Near Expiry Drill-Down



The Product Application Near Expiry Drill-Down screen displays the list of various applications. For more information on fields, refer to Table 10: Product Application Near Expiry Drill-Down – Field Description.

Table 10: Product Application Near Expiry Drill-Down – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Type	Displays the product type.

Field	Description
Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Status	Displays the status of the application.
App. Expiry Date	Displays the application expiry date
Days to Expire	Displays the total days to
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

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

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

2.10 Loan Offers Near Expiry

Loan Offers Near Expiry dashboard allows the logged-in bank user, who could be a Relationship Manager, Loan Officer or Loan Head, to view the details of loan offers which are nearing to expiry date.

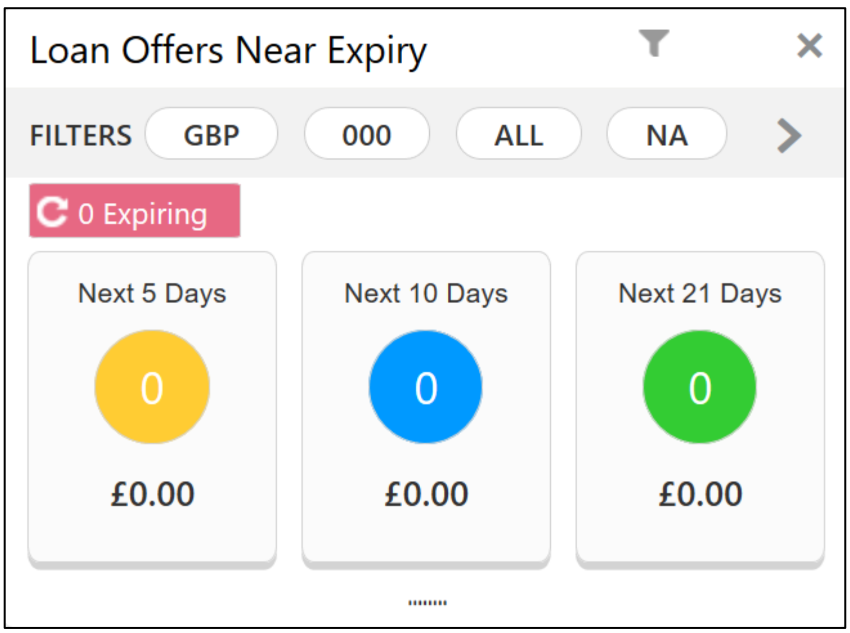
Prerequisite

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

1. From **Home screen**, click **Dashboard**.

   → The **Dashboard** screen is displayed. The **Loan Offers Near Expiry** dashboard appears in **Dashboard** screen.

Figure 19: Loan Offers Near Expiry



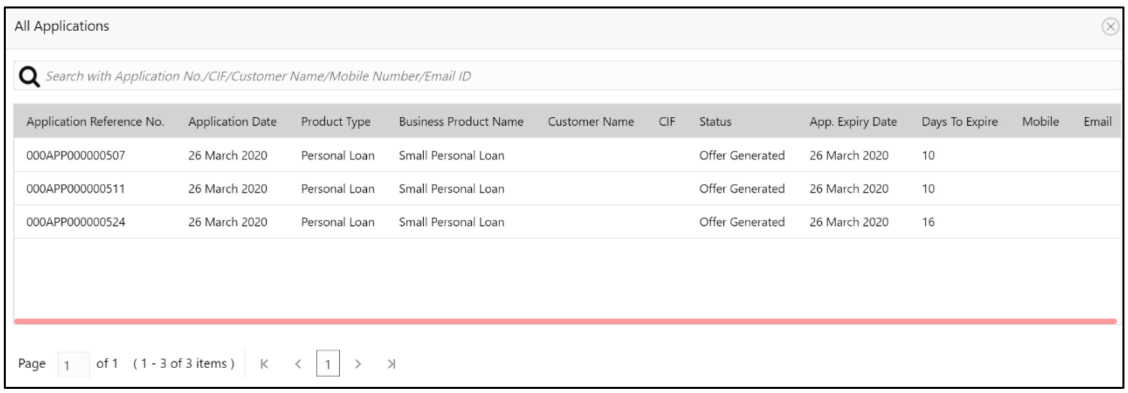
2. Click icon to filter the data. The available options are:
    - Currency
    - Branch
    - Users
    - Sub-Products

    By default, the system displays the details of all the loan offers for the logged-in user and their team, and the base currency of the branch.

3. Click on hyperlinked number.

    → The **Loan Offers Near Expiry Drill-Down** screen is displayed.

Figure 20: Loan Offers Near Expiry Drill-Down



The Loan Offers Near Expiry Drill-Down screen displays the list of various loan offers for the selected Loan offer status. For more information on fields, refer to Table 11: Loan Offers Near Expiry Drill-Down – Field Description.

Table 11: Loan Offers Near Expiry Drill-Down – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Sub-Type	Displays the product sub-type.
Product Name	Displays the product name.
Customer Name	Displays the customer name.

Field	Description
CIF	Displays the CIF.
Status	Displays the status of the application.
App. Expiry Date	Displays the application expiry date
Days to Expire	Displays the total days to
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

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

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

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