Getting Started User Guide

Oracle Banking Branch

Release 14.6.1.0.0

Part Number F61366-01

August 2022

ORACLE®

Getting Started User Guide

Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway

Goregaon (East)

Mumbai, Maharashtra 400 063

India

Worldwide Inquiries:

Phone: +91 22 6718 3000

Fax: +91 22 6718 3001

https://www.oracle.com/industries/financial-services/index.html

Contents

ORACLE®

1 Welcome to Getting Started User Guide

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

- *1.1 Accessing Application*

- *1.2 Application Environment*

- *1.3 Screen Environment*

- *1.4 How to's*

- *1.5 Common Buttons/Icons*

1.1 Accessing Application

You can access any application using the link provided by the administrator. This section contains the following topics.
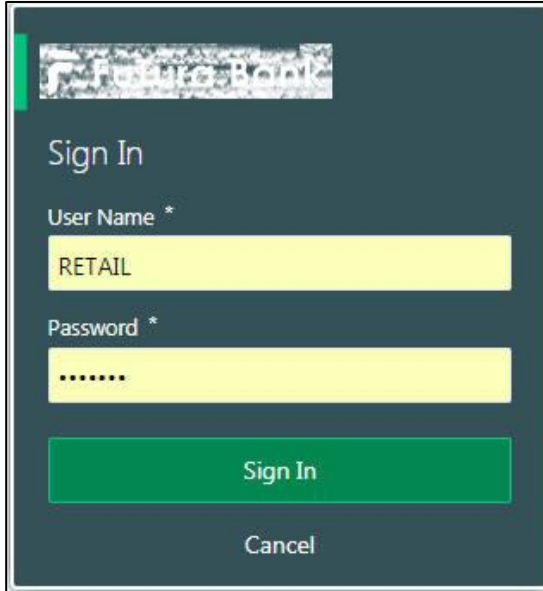
- *1.1.1 Signing In*

- *1.1.2 Signing Out*

1.1.1 Signing In

1. Enter the URL in the browser address and press **Enter**.

   → The application page appears.

   Figure 1: Signing In

2. Specify the **User Name** and **Password** provided by the administrator. Click **Sign In** to log into the application.

   → The Application Home screen is displayed.

1.1.2 Signing Out

1. In the selected application toolbar, click on the user name logged into the application.

   → The **User Profile** fly-out menu is displayed.

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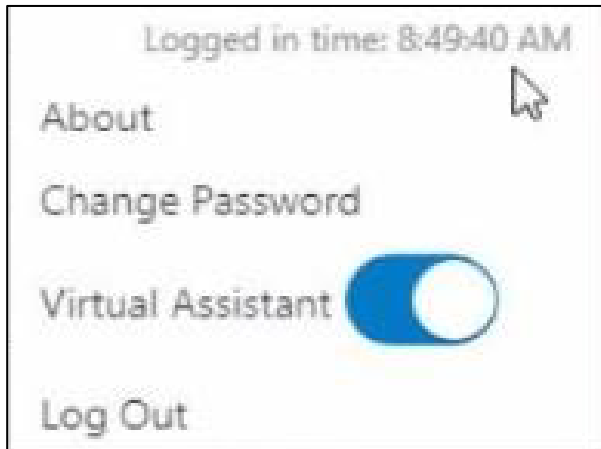
2. Click **Log Out** to sign out of the application.

1.2 Application Environment

On successful login, the selected application environment appears depending on the user privileges. A sample illustration of the home page is shown below. For more information on callouts, refer to table *Callout Details: Application Home Page*.

Figure 3: Application Home Page
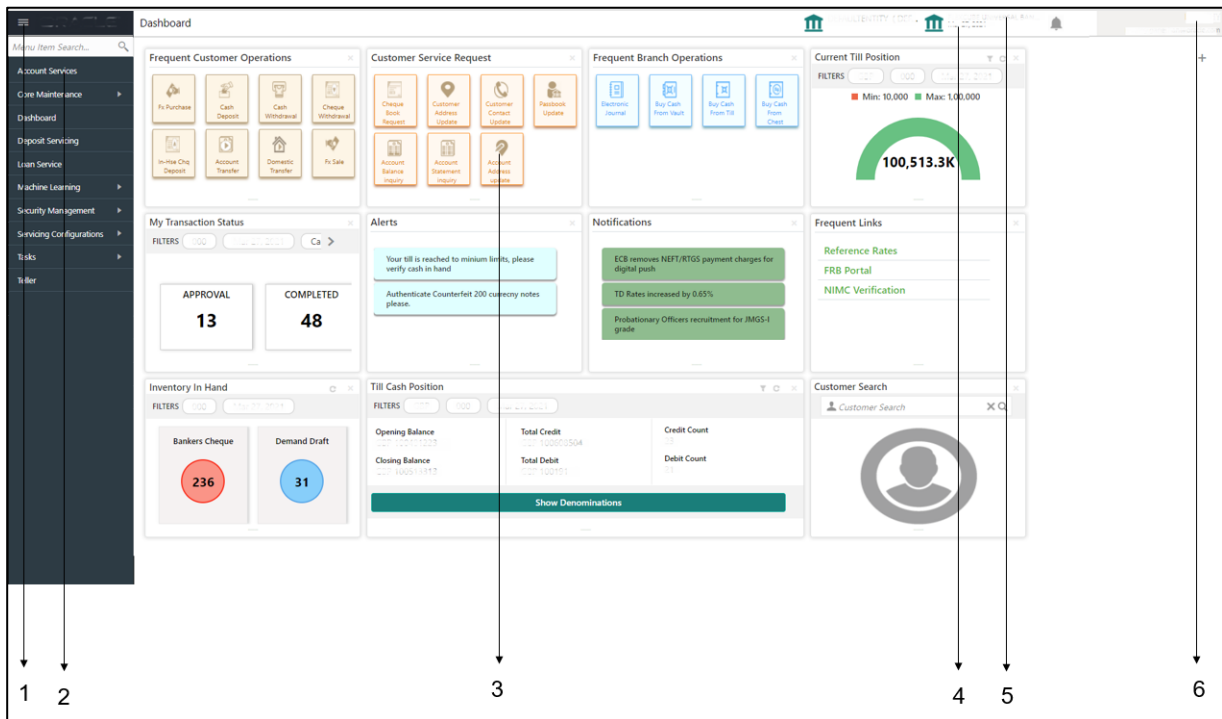
Figure 4: Teller Mega Menu
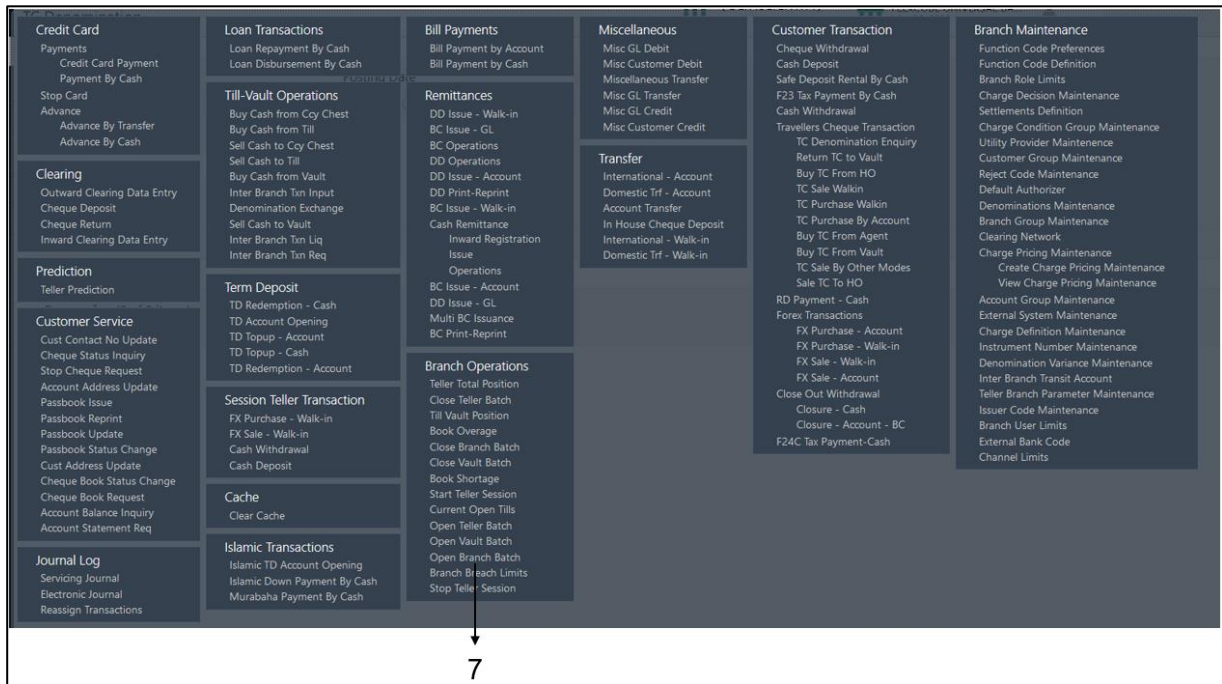
Callout Details: Application Home Page

Callout	Description
Callout 1: Hamburger Menu	Use to expand/collapse the menu.
Callout 2: Menu	Use to navigate/open the screens associated with the application.
Callout 3: Display Grid	Displays the screens/dashboards selected using the menu.
Callout 4: Application Date	Displays the application date on which the branch's EOD was last performed.
Callout 5: Bank Name	Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user. **NOTE:** Depending on the logged-in user and the branches associated, you can switch between branches and view the records.

Callout	Description
Callout 6: User Profile	User profile related options and actions are available.
Callout 7: Mega Menu	Use to open the screens associated with the Teller application.

1.3 Screen Environment

Largely, there are several types of screens in the Oracle Banking Branch application. This section describes the various types of screens in the following sub-sections:

- *1.3.1 Dashboard*

- *1.3.2 Teller Transaction Screen*

- *1.3.3 Servicing Transaction Screen*

- *1.3.4 Summary Screen*

- *1.3.5 Maintenance Screen*

- *1.3.6 Other Screens*

1.3.1 Dashboard

Depending on the access/permission provided to the logged in user, you can view the dashboards associated with the user. These dashboards helps the user to analyse the situation and take the necessary actions.

Figure 5: Dashboard
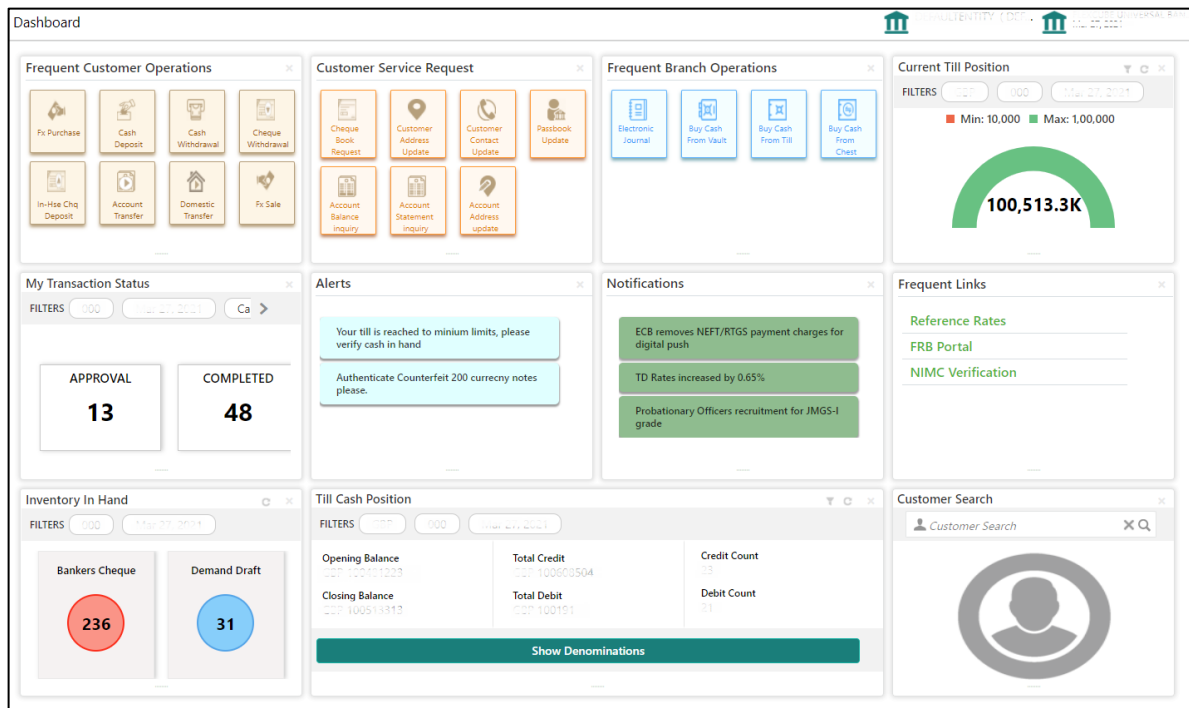
1.3.2 Teller Transaction Screen

Depending on the access/permission provided to the logged-in user, you can access a Teller transaction screen. Teller transaction screen allows you to perform the customer financial transactions; using the fields associated with the selected screen. A sample illustration of a Teller transaction screen is shown below. For more information on callouts, refer to table *Callout Details: Teller Transaction Screen*.

Figure 6: Teller Transaction Screen

Callout Details: Teller Transaction Screen

Callout	Description
Callout 1: Fields and Segments	Displays the fields and segments associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **NOTE:** There are mandatory and optional fields available for any screen. You can identify the mandatory field with (*) symbol. If you try to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.

ORACLE®

Callout	Description
Callout 2: Customer Search	Used to query and find a specific customer account.
Callout 3: Title Bar	Displays the name of the transaction.
Callout 4: Customer Information Widget	Displays the details of account and Customer.
Callout 5: Additional Widgets	Displays the widgets with the additional information necessary for the users. It includes Current Till Position and Frequent Customer Operations.
Callout 6: Submit	Click to submit the transaction with the entered details.
Callout 7: Cancel	Click to reset the entered details in the transaction screen.

1.3.3 Servicing Transaction Screen

Depending on the access/permission provided to the logged-in user, you can access a Servicing transaction screen. Servicing transaction screen allows you to perform the servicing transactions and customer service transactions; using the fields associated with the selected screen. A sample illustration of a servicing transaction screen is shown below. For more information on callouts, refer to table *Callout Details: Servicing Transaction Screen*.

ORACLE®

Figure 7: Servicing Transaction Screen

Callout Details: Servicing Transaction Screen

Callout	Description
Callout 1: Fields	Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields.
	NOTE: There are mandatory and optional fields available for any screen. You can identify the mandatory field with (*) symbol. If you try to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.
Callout 2: Customer Search	Used to query and find a specific customer account.
Callout 3: Title Bar	Displays the name of the transaction.

Callout	Description
Callout 4: Customer Information Widget	Displays the details of account and Customer.
Callout 5: Exit	Click to exit from the transaction screen.

1.3.4 Summary Screen

Depending on the access/permission provided to the logged-in user, you can access a summary screen. Summary screen provides information about the configured records; you can perform few common actions and view the records. A sample illustration of a summary screen is shown below. For more information on callouts, refer to table *Callout Details: Summary Screen*.

Figure 8: Summary Screen
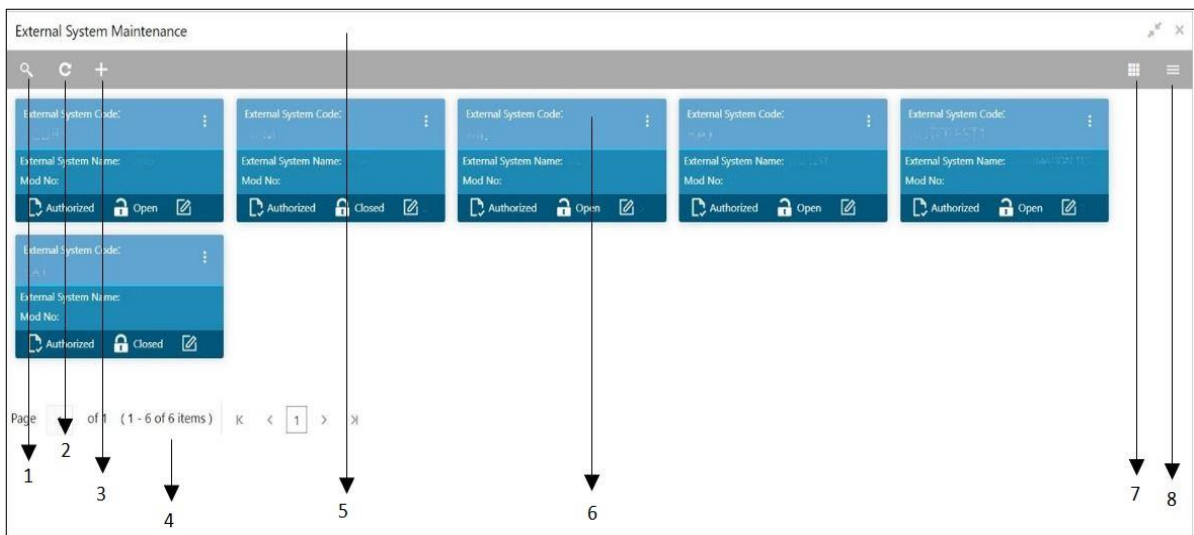
Callout Details: Summary Screen

Callout	Description
Callout 1: Search	Click to search/view a record from a selected summary screen.
Callout 2: Refresh	Click to refresh all records configured in the selected summary screen.

ORACLE®

Callout	Description
Callout 3: Add	Click to create/configure a new record.
Callout 4: Pagination	Displays the number of items available and the page numbers.
Callout 5: Title Bar	Displays the name of the screen and couple of common actions such as minimize and remove. For more information, see Minimizing Records and Closing Records.
Callout 6: Records	Displays the configured records, you can view the records in different format. For more information, see *View Records*.
Callout 7: Tile View	Displays the configured records in the tile format.
Callout 7: List View	Displays the configured records in the list format.

1.3.5 Maintenance Screen

Depending on the access/permission provided to the logged-in user, you can access a maintenance screen. Maintenance screen allows you to create/configure new records; using the fields associated with the selected maintenance screen, you can save a new record. A sample illustration of a maintenance screen is shown below. For more information on callouts, refer to table *Callout Details: Maintenance Screen*.

ORACLE®

Figure 9: Maintenance Screen

**Callout Details: Maintenance Screen**

Callout	Description
Callout 1: Fields	Displays the fields associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields.
	NOTE: There are mandatory and optional fields available for any screen. You can identify the mandatory field with (*) symbol. If you try to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.
Callout 2: Title Bar	Displays the name of the screen and couple of common actions such as minimize and remove. For more information, see *Minimize Records* and *Close Records*.

Callout	Description
Callout 3: Save	Click to save the entered details in the maintenance screen.
Callout 4: Cancel	Click to reset the entered details in the maintenance screen.
Callout 5: Audit	Click to check the history of the configured records in the maintenance screen.

1.3.6 Other Screens

The user can also access the screens, which are not categorized under the other types. These screens are used to perform certain operations; using the fields associated with the selected screen. A sample illustration of a screen is shown below. For more information on callouts, refer to table *Callout Details: Other Screens*.

Figure 10: Other Screens

ORACLE®

Callout Details: Other Screens

Callout	Description
Callout 1: Fields	Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **NOTE:** There are mandatory and optional fields available for any screen. You can identify the mandatory field with (*) symbol. If you try to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.
Callout 2: Title Bar	Displays the name of the screen.

1.4 How to's

As a new user, you might require to perform a set of tasks that are similar in all the screens such as to transactions, operations, and maintenances. This section explains how to begin working with your tasks:

- *1.4.1 Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations*

- *1.4.2 Perform Maintenances*

- *1.4.3 Configure Dashboard*

1.4.1 Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations

Depending on the permissions/rights provided for the logged-in user, you can access the transaction screens. To process a screen, type <name of the screen> in the **Menu Item Search** located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. On the menu (by default, the hamburger menu is expanded), click **Teller**. On **Teller Mega Menu**, click <name of the screen>.

   → The screen associated with the menu is displayed.

Once the screen is displayed, you can enter/query the necessary details in the fields and submit the transaction. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see Mandatory and Optional Fields.

After submitting a transaction, you can perform any of the following actions:

- Authorize – used to authorize a transaction.

- Reject – used to reject an authorized transaction.

- Re-submit – used to re-submit a transaction.

1.4.1.1 Minimize Screen

In the selected screen, click ⬚ icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.

1.4.1.2 Close Screen

In the selected screen, click ✕ icon to close the screen. If you are in the middle of creating/modifying the data in a selected screen, an error/warning message appears prompting to save the changes.

ORACLE®

1.4.2 Perform Maintenances

Depending on the permissions/rights provided for the logged-in user, you can access the maintenance screens. To process a screen, type <name of the screen> in the **Menu Item Search** located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. On the menu (by default, the hamburger menu is expanded), click **Teller**. On **Teller Mega Menu**, click <name of the screen>.

   → The screen associated with the menu is displayed.

Once the summary screen is displayed, you can click **+** icon navigate to new screen, enter the necessary details in the fields, and create a new record. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see Mandatory and Optional Fields.

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

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

- Search Records

- Create/Configure Records

- Copy Records

- Reopen Records

- Print Records

- Minimize Records

- Audit Records

- View Records

- Refresh Records

- Edit Records

- Unlock Records

ORACLE®

- Delete Records

- Authorize Records

- Close Records

1.4.2.1 View Records

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

1.4.2.1.1 Tile View

The default summary view of the records are tile view. Displays the configured records in a tile format with few key fields that are associated with the screen. You can click a tile to open a record in a full screen and view the details.
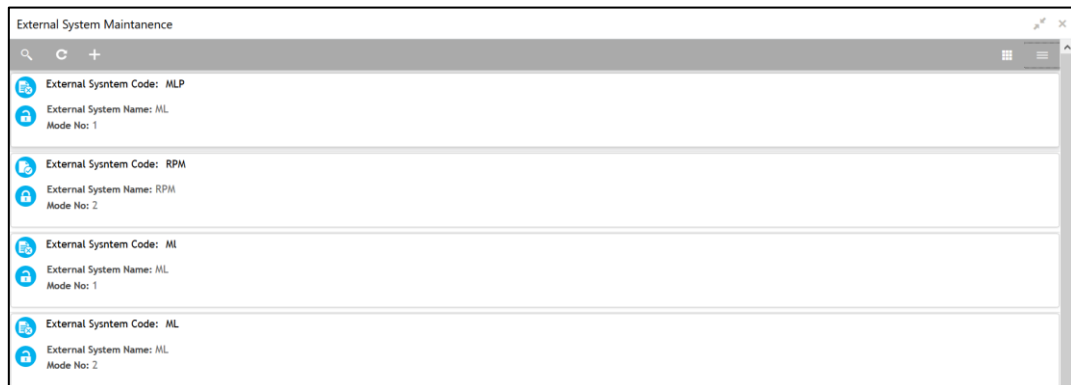
Figure 11: Tile View
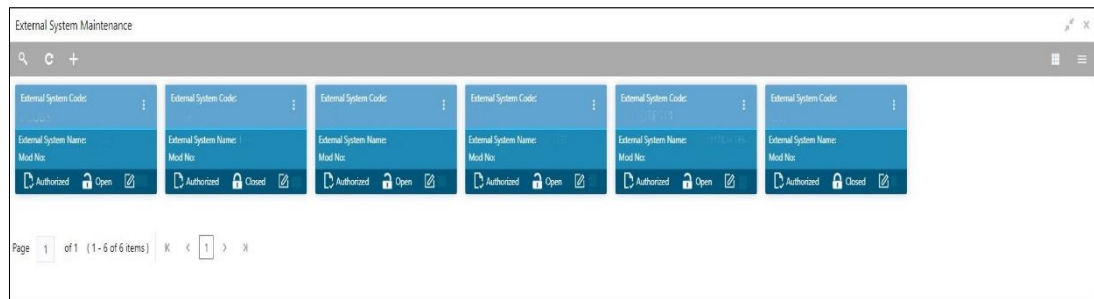
1.4.2.1.2 List View

Displays the configured records in a list format. In the selected screen, click List View on the action toolbar as illustrated to view the details.

Figure 12: List View

ORACLE®

1.4.2.2 Search Records

Perform the following steps to search for records based on specific criteria:

1. In the selected screen, click search icon.

    → The fields associated with the selected screen appear in a dropdown menu.

Figure 13: Search Record

2. Specify the required details associated with the selected screen.

3. Click **Search** to view the requested record.

1.4.2.3 Pagination

The number of records are displayed on the bottom left corner of the selected view screen. Depending on the records available, the number of pages appear. You can navigate to the first page, last page, previous page, or next page by using the number icons.

1.4.2.4 Refresh Records

In the selected screen, click Refresh icon, the records associated with the selected screen is updated with the latest details.

1.4.2.5 Create/Configure Records

You can create/configure records in any of the three ways:

1. In the selected view screen, click **Add** to create/configure a record.

2. In the selected view screen, click on a configured record. Click **New** to create/configure a record.

3. On the menu, select a sub-menu, and click <Create name of the screen>.

1.4.2.6 Edit Records

Perform the following steps to edit a record:

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

1. In a selected screen, click a record and make the required changes to the record.

2. Click **Save** to save the modified record.

ORACLE®

1.4.2.7 Copy Records

Perform the following steps to copy a record:

1. In a selected screen, click a record.

2. Click Copy to copy the selected record details and make the required changes to the record such as name.

3. Click Save to save the modified record.

1.4.2.8 Unlock Records

Perform the following steps to unlock a record:

1. In a selected screen, click a record.

2. Click **Unlock** to unlock the selected record details and make the required changes to the record such as name.

3. Click **Save** to save the modified record.

1.4.2.9 Reopen Records

Perform the following steps to re-open a record:

1. In a selected screen, click a record.

2. Click **Reopen**, a confirmation popup appears.

3. Provide a remark and click **Confirm** to reopen the record.

1.4.2.10   Delete Records

In a selected screen, select a record and click **Delete** to remove the record.

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

1.4.2.11   Print Records

Perform the following steps to print a record:

1. In a selected screen, click a record.

2. Click **Print** to view the record in a print format and print the records.

ORACLE®

1.4.2.12   Authorize Records

Perform the following steps to authorize a record:

1. In the selected screen, click a record.

2. Click **Authorize**, the records associated with the selected screen that must be authorized appears.

3. Select the required record that must be authorized.

4. Click **Approve**, a confirmation popup appears.

Figure 14: Authorize
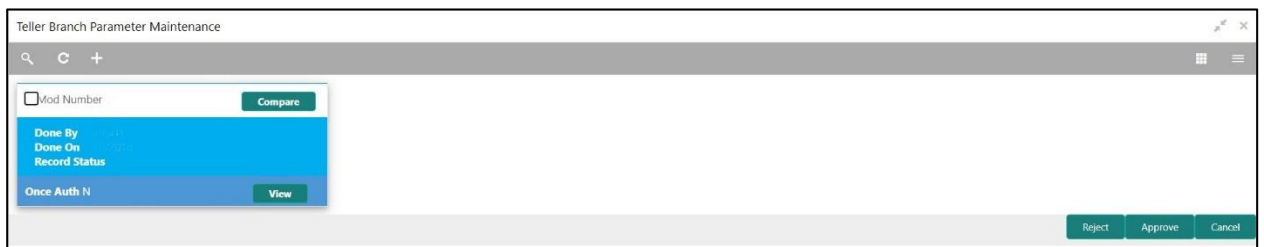
5. Provide a remark and click **Confirm** to authorize the record.

Figure 15: Confirm Authorization
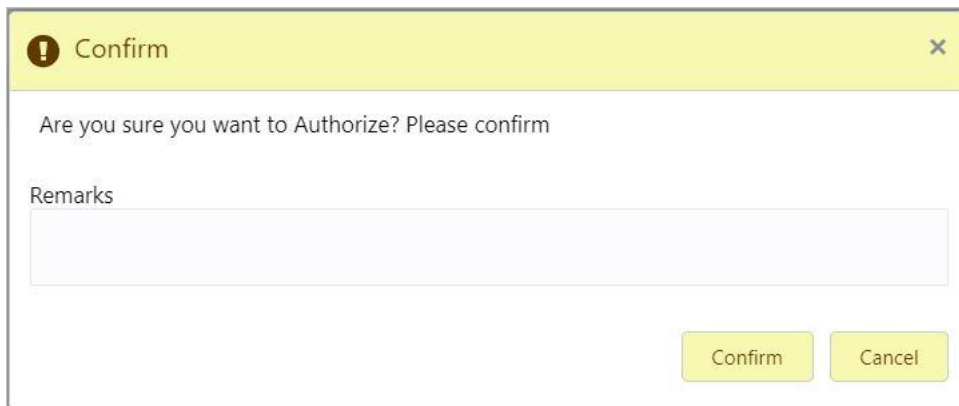
1.4.2.13   Minimize Records

In the selected screen, click ⬚ icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.

1.4.2.14   Close Records

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

1.4.2.15 Audit Records

Perform the following steps to audit a record:

1. In the selected screen, click **Audit** to view the change history of the record.

   → The audit detail popup is displayed.

Figure 16: Audit Record

2. Click **Show History** to view the modification history of the record.

Figure 17: Modification History

3. Click **Back** to navigate to the previous screen.

4. Click anywhere on the screen to close the audit detail popup.

1.4.3 Configure Dashboard

1.4.3.1 Configure Tile

Perform the following steps to configure a Tile:

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

2. Select the required options:

    Allow the user to...

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

    *   Reorder the tile: If selected, you can rearrange the dashboard widget in the dashboard-landing page.

    Put the tile into other states:

    *   Flipped: If selected, you can flip the dashboard widget for more information.

    *   Expanded: If selected, you can expand the dashboard widget in the dashboard landing page.

    *   Both flipped and expanded at the same time: If selected, you can flip and expand the dashboard widget in the dashboard landing page.

3. Click Close to update the dashboard widget configuration.

1.4.3.2 Remove Tile

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

1.4.3.3 Reorder Tile

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

1.4.3.4 Expand Tile

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

ORACLE®

1.4.3.5 Add Tile

Perform the following steps to add a Tile:

1. Click **Add Tiles to Dashboard** to add more available dashboard widget to the dashboard-landing page.

    → The **Click on tiles to add them** popup screen appears.

Figure 18: Audit Record

Click on tiles to add them   ✕

Select a tile to add it to the dashboard

   No items to display.
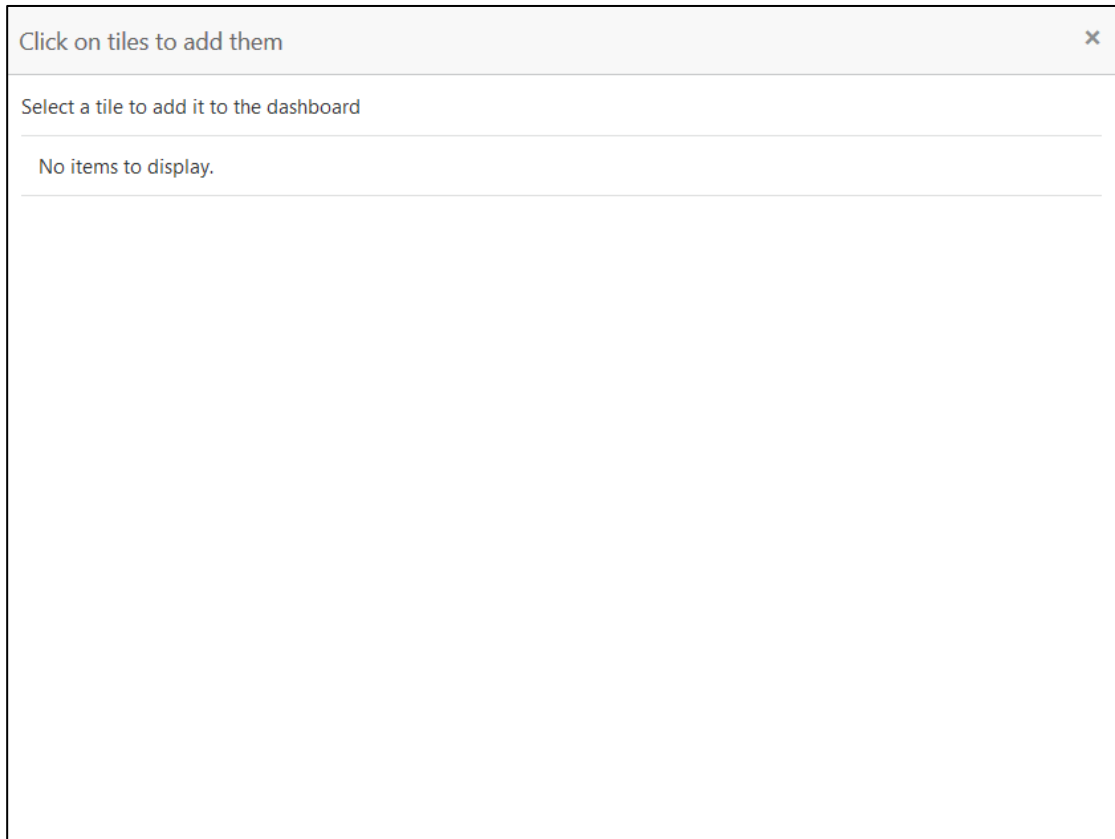
2. Click on the dashboard you want to add to the dashboard-landing page. The page is automatically refreshed and displays the added dashboard widget.

ORACLE®

1.5 Common Buttons/Icons

This section provides information about all the common buttons/icons used in the application. For more information, refer to table *Common Buttons/Icons*.

Common Buttons/Icons

Button/Icon	Description
Submit	Complete the transaction or request.
Cancel	Cancel the transaction or request.
New	Creates a new record for the selected screen.
Query	View all the required information/configured records for the selected screen.
Unlock	Unlock the configured record for the selected screen.
Search	Search the configured record and select the required record for the selected screen.
Delete	Remove the configured record for the selected screen.
Reopen	Reopens a closed record for the selected screen.
Close	Closes the screen.
Authorize	Authorize the configured record for the selected screen.
Collapse	Minimises the opened screen to the bottom left corner of the screen.
Audit	Check the history of the configured records for the selected screen.

ORACLE®

Button/Icon	Description
Save	Save the configured record for the selected screen.
+	Add a row in the grid.
-	Remove a row in the grid.
>	Navigate to the next page.
<	Navigate to the previous page.
|<	Navigate to the first page.
>|	Navigate to the last page.

2 Glossary of Terms

This section provides a glossary of all terms and abbreviations used in the user guide. For more information on terms, refer to table *Glossary of Terms and Abbreviations*.

Glossary of Terms and Abbreviations

Term	Definition
Hamburger Menu	It is placed in the top-left corner of the application. You can click to access the menu and sub-menu associated with the application.
Display Grid	It is a container that consists of fields and action buttons, which allows you to view/perform actions.
Menu	It is a list of features that are organized for easy access. Generally, there are several sub-menus associated with a menu; each sub-menu has a set of features either in a sequence or non-sequence manner.
Mega Menu	A large panel divided into groups of menu items, which simplifies the navigation. The menu items are grouped based on the type of transaction/operation.
User Profile	Provides information associated with the logged-in user and provides few actions that a user can perform.
Sign In	Log in to an application to access the application/records.
Sign Out	Log out/leave the application.
Records	It is a piece of information that is configured using the application.

ORACLE®

3 Index

ORACLE®

4   Reference and Feedback

This chapter provides information on reference documents, Customer support, and feedback. These are described in the following sections:

- *4.1 References*

- *4.2 Feedback and Support*

4.1   References

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

- Security Management System User Guide

- Common Core User Guide

4.1.1   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.

4.2   Feedback and Support

Oracle welcomes customers' comments and suggestions on the quality and usefulness of the document. Your feedback is important to us. If you have a query that is not covered in this user guide or if you still need assistance, please contact documentation team.