

**Servicing Configurations User Guide**

**Oracle Banking Branch**

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## **Servicing Configurations 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>

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# 1 Preface

## 1.1 Introduction

Welcome to the Servicing Configurations User Guide for the Oracle Banking Branch. It provides an overview of how to configure the Business Product Configuration, Business Process, and related workflows for servicing of Customer Account Transactions, Term Deposit Transactions, and Loan Transactions.

## 1.2 Audience

This user guide is intended for back-office and front-end staff who setup and use Oracle Banking Branch.

## 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 and Abbreviations**

<b>Abbreviation</b>	<b>Description</b>
System	Oracle Banking Branch

## 1.5 List of Topics

This user guide is organized as follows:

**Table 2: List of Topics**

<b>Topics</b>	<b>Description</b>
<b>Configurations</b>	This topic provides detailed information about configurations that needs to be performed for Servicing transactions.
<b>Error Codes and Messages</b>	This topic provides the error messages that you encounter while working with Servicing Configurations in Oracle Banking Branch.
<b>List of Menus</b>	Provides a list of menus arranged in alphabetical order.

## 1.6 Related Documents

The related documents are as follows:

1. Getting Started User Guide
2. Teller User Guide

## 1.7 Symbols

Following symbols are used in this guide:

**Table 3: List of Symbols**

<b>Symbol</b>	<b>Function</b>
→	Represents Results

## 2 Servicing Configurations

This chapter is designed to help you quickly get acquainted with the Servicing Configurations for Oracle Banking Branch.

### Pre-requisites

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

→ The **Home screen** is displayed.

This chapter includes following sections:

- [2.1 Introduction](#)
- [2.2 Business Product Configuration](#)
- [2.3 Business Process Configuration](#)

### 2.1 Introduction

Oracle Banking Branch is a retail banking application that gives a 360-degree view of the customer financial and non-financial transactions. It helps to provide better customer-focused services as well as cross-sell and up-sell the other products and services of the bank. This document provides an overview of the configurations that are required for the various Oracle Banking Branch processes.

Oracle Banking Branch is factory shipped with referenced workflows for the servicing. It is capable of configuring the workflows based on the bank's internal policy and requirements. Configurations such as Business Product and Business Process allows the bank to define their own workflows. The brief summary of the configurations is described as below:

The Servicing in Oracle Banking Branch are driven based on the below configurations:

- Business Product
- Business Process

## 2.2 Business Product Configuration

Business Product Configuration allows you to configure the various services for Retail Bank offerings. The details captured in the Business Products configuration are used for processing the servicing transactions.

The Business Product created in Oracle Banking Branch are linked with the Host Product. It is important to note that there is only one Golden Source for Product creation or configuration, which is in the HOST. The Business Product created in Oracle Banking Branch allows to configure parameters that are more customer facing and how the products are sold in Banks.

The Business Product is linked to the Business Process, so that the servicing transactions related to the selected Business Product will flow as per the Business Process Definition.

The Business Product process allows to create Business Product and view the existing Business Products; the details of that are explained in the further sections.

This section includes following subsections:

- [2.2.1 Create Business Product](#)
- [2.2.2 View Business Product](#)

## 2.2.1 Create Business Product

The Create Business Product configuration process comprises of the below mentioned data segments, allowing you to define the various elements for the products:

- Business Product Details
- Host Product Mapping

The Business Product Details is the first data segment of Create Business Product application. To process this screen, type **Create Business Product** 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. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Product**.
2. Under **Business Product**, click **Create Business Product**.

→ The **Create Business Product** screen is displayed.

**Figure 1: Create Business Product – Business Product Details**

3. Specify the details in the **Business Product Details** segment. The data fields which are marked with asterisk are mandatory. For more information on menus, refer to [Table 4: Create Business Product – Business Product Details – Field Description](#).



**Table 4: Create Business Product – Business Product Details – Field Description**

<b>Field</b>	<b>Description</b>
<b>Product Type</b>	<p>Select the product from the drop-down list.</p> <p>Available options are:</p> <ul style="list-style-type: none"> <li>• Customer Account Services</li> <li>• Term Deposit Account Services</li> <li>• Loan Account Services</li> </ul>
<b>Product Sub Type</b>	<p>Select the product sub-type from the drop-down list. Product sub-types supported are based on the Product Type selected.</p> <ul style="list-style-type: none"> <li>a. Customer Account Services <ul style="list-style-type: none"> <li>▪ Scheduled Transfer</li> <li>▪ Sweep In to Account</li> <li>▪ Sweep Out from Account</li> <li>▪ Cheque Leaves Default</li> </ul> </li> <li>b. Term Deposit Account Services</li> <li>c. Loan Account Services</li> </ul>
<b>Business Product Code</b>	<p>Specify the business product code.</p> <p><b>NOTE:</b> Maximum length of business product code should not be more than 6 characters. Alphanumeric and alphabets should be in capital.</p>
<b>Business Product Description</b>	<p>Specify the business product description.</p>
<b>Channel Allowed</b>	<p>Select the channels that should be allowed for the business product from the drop-down list. For Example – Oracle Banking Digital Experience.</p>
<b>Fintech Allowed</b>	<p>Select if the business product is supported for servicing transaction from Fintech Companies.</p>

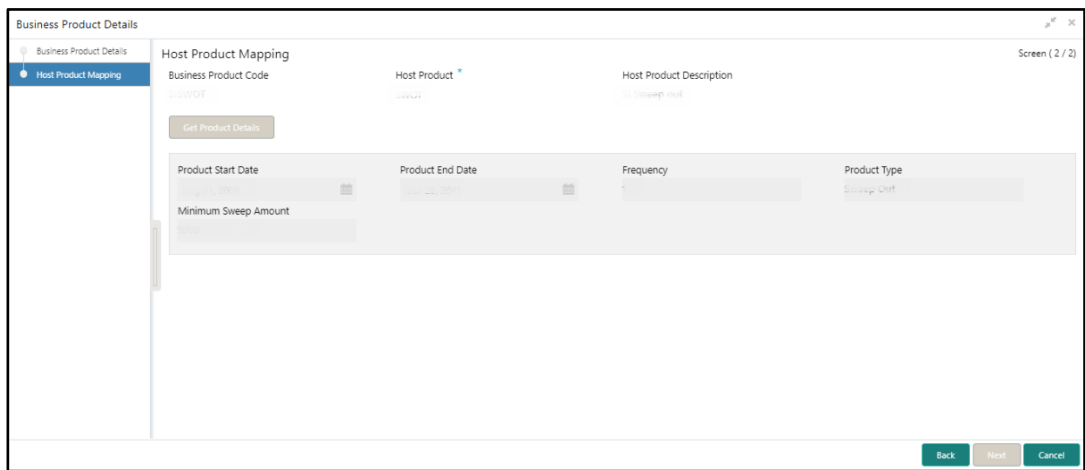
Field	Description
<b>Fintech Name</b>	Select the Fintech Company name from the drop-down list. System allows selection of multiple companies.  <b>NOTE:</b> This field is <b>mandatory</b> , if <b>Fintech Allowed</b> is selected.
<b>Back</b>	Click <b>Back</b> to navigate to the previous data segment within a stage.  <b>NOTE:</b> Since this is the first screen on the workflow, Back will be disabled.
<b>Next</b>	Click <b>Next</b> to navigate to the next data segment, after successfully capturing the data.  <b>NOTE:</b> Specify the details in the mandatory fields before you proceed to next data segment. System will validate for all mandatory data segments and data fields. If mandatory details are not provided, system displays an error message for the user to take action.
<b>Save &amp; Close</b>	Click <b>Save &amp; Close</b> to save the data captured, the saved data will be available in <b>View Business Product</b> with status <b>In Progress</b> . The user can work on it later from picking it from the <b>View Business Product</b> .
<b>Cancel</b>	Click <b>Cancel</b> to close the Business Product screen, screen get closed without saving the data.

- Click **Next** in **Business Product Details** segment to proceed with next data segment, after you specify the data.

→ The **Host Product Mapping** segment is displayed.

**NOTE:** The following screen is displayed if **Scheduled Transfer, Sweep In to Account, Sweep Out from Account, Term Deposit Account Services, or Loan Account Services** option is selected from the **Product Sub Type** field in the **Business Product Details** segment. In this data segment, the business product is mapped to the host product and parameters for processing servicing transactions are defined.

**Figure 2: Create Business Product – Host Product Mapping**



- Specify the details in the **Host Product Mapping** segment. The data fields which are marked with asterisk are mandatory. For more information on fields, refer to [Table 5: Create Business Product – Host Product Mapping - Field Description](#).

**Table 5: Create Business Product – Host Product Mapping - Field Description**

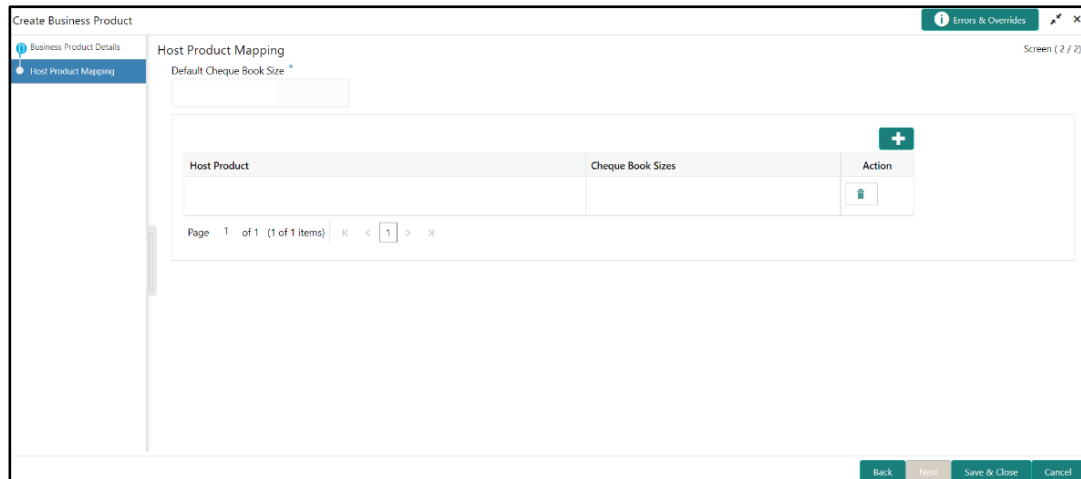
Field	Description
<b>Business Product Code</b>	Displays the business product code defaulted from <b>Business Product Code</b> entered in the Business Product Details data segment.
<b>Host Product</b>	Select the host product from the drop-down list.
<b>Host Product Description</b>	Displays the product description once the host product is selected in <b>Select Host Product</b> .

Field	Description
<b>Get Products Details</b>	<p>Click <b>Get Product Details</b>, and the system will default the parameter configured at host product. When you click this button, the system defaults the values in the following fields:</p> <ul style="list-style-type: none"> <li>• Product Start Date</li> <li>• Product End Date</li> <li>• Frequency</li> <li>• Product Type</li> <li>• Minimum Sweep Amount</li> </ul>
<b>Product Start Date</b>	Default the Product Start Date from host.
<b>Product End Date</b>	Default the Product End Date from host.
<b>Frequency</b>	Default the frequency from host.
<b>Product Type</b>	Default the Product type from host.
<b>Minimum Sweep Amount</b>	<p>Displays the minimum sweep amount defaulted from host.</p> <p><b>NOTE:</b> This field is displayed only if the <b>Product Sub Type</b> in <b>Business Product Details</b> segment is selected as <b>Sweep Out from Account</b> or <b>Sweep In to Account</b>.</p>
<b>Back</b>	Click <b>Back</b> to navigate to the previous data segment within a stage.
<b>Next</b>	<p>Click <b>Next</b> to navigate to the next data segment, after successfully capturing the data.</p> <p>Specify the details in the mandatory fields before you proceed to next data segment. System will validate for all mandatory data segments and data fields. If mandatory details are not provided, system displays an error message for the user to take action.</p>

Field	Description
<b>Save &amp; Close</b>	Click <b>Save &amp; Close</b> to save the data captured, the saved data will be available in <b>View Business Product</b> with status <b>In Progress</b> . The user can work on it later from picking it from the <b>View Business Product</b> .
<b>Cancel</b>	Click <b>Cancel</b> to close the Business Product screen, it get closed without saving the data.

**NOTE:** The following screen is displayed if **Cheque Leaves Default** option is selected from the **Product Sub Type** field in the **Business Product Details** segment.





**Figure 3: Create Business Product – Host Product Mapping (Cheque Leaves Default)**



- Specify the details in the **Host Product Mapping** segment. The data fields which are marked with asterisk are mandatory. For more information on fields, refer [Table 6: Create Business Product – Host Product Mapping \(Cheque Leaves Default\) - Field Description](#)

**Table 6: Create Business Product – Host Product Mapping (Cheque Leaves Default) - Field Description**

Field	Description
<b>Default Cheque Book Size</b>	Specify the numeric values for cheque book sizes against those accounts, for which the Account Classes have not been mapped or that have been created newly in the system.

Field	Description
	<p><b>NOTE:</b> A <b>Close</b> icon is displayed next to the value specified as you tab out of the field. To remove the value, click the <b>Close</b> icon.</p>
<p><b>Host Product</b></p>	<p>Select the account classes defined in the system.</p> <p><b>NOTE:</b> This field is enabled if you click the  icon displayed above the table. An Account Class cannot belong to more than one group of Host Product.</p>
<p><b>Cheque Book Sizes</b></p>	<p>Specify numeric values for the cheque book sizes for the account classes selected.</p> <p><b>NOTE:</b> This field is enabled if you click the  icon displayed above the table. You are not allowed to enter duplicate values in this field.</p>
<p><b>Action</b></p>	<p>Displays the  icon to remove the row added.</p> <p><b>NOTE:</b> This field is enabled if you click the  icon displayed above the table.</p>

5. Click **Save & Close**.

## 2.2.2 View Business Product

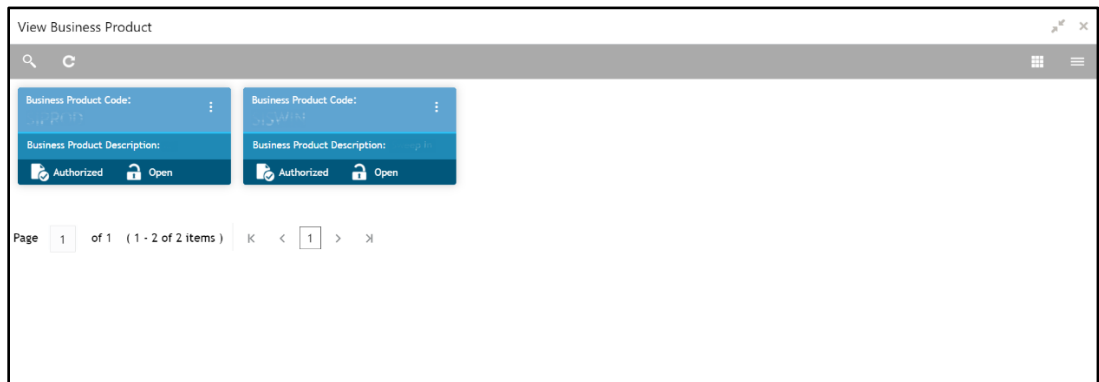
Oracle Banking Branch supports to view the business product created. The View Business Product allows the user to view all of the authorized, un-authorized and closed business product. Authorize option is also available for supervisor users for approving un-authorized business product.


To process this screen, type **View Business Product** 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. From **Home screen**, Click on **Servicing Configurations**. Under **Servicing Configurations**, click **Business Product**.
2. Under **Business Product**, click **View Business Product**.

→ The **View Business Product** screen is displayed.

**Figure 4: View Business Product**



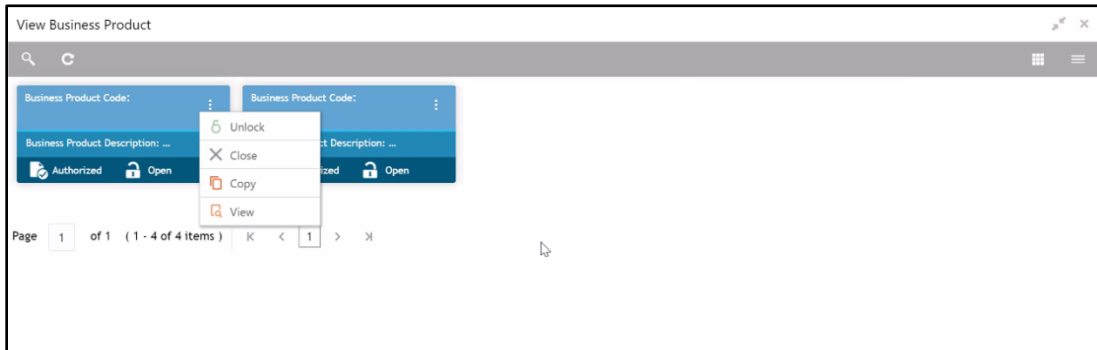
- Click  icon on the top right-hand side of the business product tile.

**Pre-condition**

Only if business product is authorized.

→ The following **View Business Product Pop-up** is displayed.

**Figure 5: View Business Product Pop-Up**

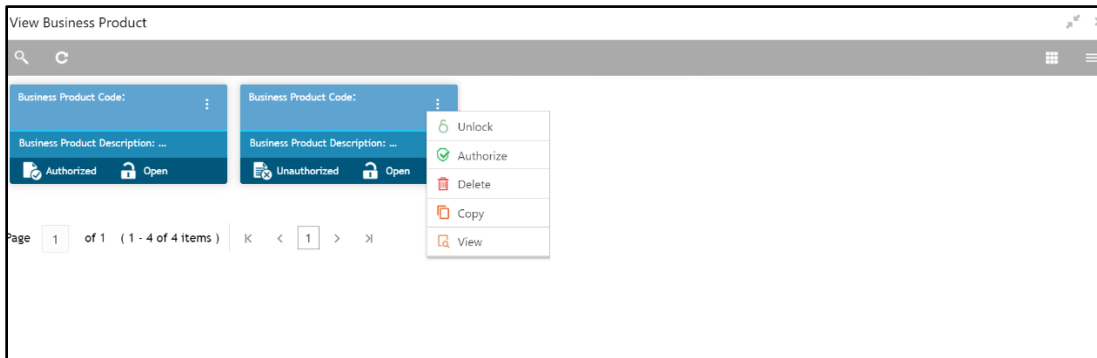


**Pre-condition**

Only if business product is un-authorized.

→ The following **View Business Product Pop-up** is displayed.

**Figure 6: View Business Product Pop-Up**





For more information on options, refer to [Table 7: View Business Product - Field Description](#).

**Table 7: View Business Product - Field Description**

Field	Description
<b>Unlock</b>	<p>As specified in <a href="#">Figure 5</a> and <a href="#">Figure 6</a>, this option is common for authorized and un-authorized business product. Click <b>Unlock</b> to edit the business product information in Create Business Product data segment.</p> <p>System will not allow to edit the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Product Type</b></li> <li>• <b>Product Sub-Type</b></li> <li>• <b>Business Product Code</b></li> </ul> <p>Make the required changes in the other relevant data segment and submit the business product.</p>
<b>Close</b>	<p>Click <b>Close</b> to close the business products that are no more relevant for banking product offering. User can close only authorized business products.</p>
<b>Copy</b>	<p>Click <b>Copy</b> to copy the authorized or un-authorized business products to quickly create new business product.</p>
<b>View</b>	<p>Click <b>View</b> to view the authorized or un-authorized business products.</p>
<b>Authorize</b>	<p>User with supervisor access will be able to authorize the un-authorized business product. Once approved, the business product status changes to 'Authorized' and is available for linking in the Business Process.</p>
<b>Delete</b>	<p>Click <b>Delete</b> to delete the business products that are un-authorized and no more required.</p>

## 2.3 Business Process Configuration

Oracle Banking Branch is equipped with Business Process configuration helping banks to build desired workflow for servicing transactions by defining the stages, respective data segments, checklists, documents required and advice generation for the stages.

A business process can be defined as a set of activities and tasks that, once completed, will accomplish the distinct servicing processes. The business process must involve clearly defined inputs and a single output.

The business process definition will determine the different stages which are required for a given combination of the process code, life cycle and business product code. The workflow management of these stages and the relevant stage movements are defined in Oracle Banking Microservices Architecture / Conductor to help us orchestrate the micro-services based process-flow and ensure seamless transition of Servicing process across various stages in that given order. The Oracle Banking Microservices Architecture / Conductor process will drive the workflow from one stage to another based on the process outcomes at the respective stages and subject to fulfilling of the mandatory data capture, confirmation on the mandatory checklist items and submission of mandatory documents at the respective stages. The stages defined in the business process can be dynamically assigned to different user profiles or roles.

During servicing transactions, the system picks the business process run-time and initiates the workflow based on the configuration.

The Prerequisites for configuring the Business Process are enumerated below:

- **Lifecycle**

Lifecycle represents the lifecycle of the process for which the Business Process is created. These are factory shipped codes and currently support Servicing Transactions such as Customer Account transactions, Term Deposit Transactions and Loan Account transactions.

- **Process Code**

Process Code defines the various stages relevant for the servicing transactions. Process Code configuration allows you to define the business process flow that needs to be mapped for the business product and lifecycle code combination in the Business Process configuration.

A set of default process codes are factory-shipped for the reference workflow. User can also create process codes in “CMC\_TM\_PROCESS\_CODE” and “CMC\_TM\_PROCESS\_STAGE” tables.

- **Business Product**

Business Product maintenance allows configuring the various business products in accordance with the product offerings that the bank deals in. Each business product has a unique business process defined for a specific lifecycle code selected.

This section includes following subsections:

- [2.3.1 Create Business Process](#)
- [2.3.2 View Business Process](#)

### 2.3.1 Create Business Process

The Create Business Process aids in configuring the workflow for Servicing Transactions. As mentioned earlier, this process will allow to define the data segments, checklists, documents and advices for the stages defined in the process code selected for the lifecycle code and business product combination.

The Create Business Process configuration allows to configure the below elements for each of the stages of the Servicing Transactions:

- a. Data Segment - A data segment, as the name suggests is an individual block of data. Bringing in data segments allows to break down a huge process into smaller units, which will be easier to update, maintain and process. Business Process will consists of such several data segments that makes up the stage.

Business Process Definition enables the user to perform the following:

- Add n number of data segments to each stage.
  - Set the data segment as mandatory or non-mandatory.
  - Set the data segment as editable or non-editable.
  - Control the sequence order of the data segments.
  - Select the stage.
- b. Document - The documents are required to be submitted by the customer for the Servicing Transactions.
  - c. Checklist - Checklist are the distinct, and the following steps describes list of mandatory check-points by the bank to its users to adhere to during the Servicing Transactions.

- d. **Advices** - Advices are official letter of notices detailing an action taken or to be taken on a stated date by the bank. This is the final configuration for the Business Process creation.

To process this screen, type **Create Business Process** 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. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Process**.
2. Under **Business Process**, click **Create Business Process**.

→ The **Create Business Process** screen is displayed.

**Figure 7: Create Business Process**

3. Specify the fields in the **Create Business Process** screen. The data fields which are marked with asterisk are mandatory. For more information on menus, refer to [Table 8: Create Business Process - Field Description](#).

**Table 8: Create Business Process - Field Description**

Field	Description
<b>Business Process Code</b>	Specify an alphanumeric business process code. Maximum Length allowed is 16.
<b>Business Process Description</b>	Specify the description of the business process code. Maximum Length allowed is 60.
<b>Lifecycle</b>	Search and select the lifecycle code.
<b>Lifecycle Description</b>	Displays the description of the lifecycle selected.
<b>Process Code</b>	Search and select the process code of the business process flow that needs to be mapped for the lifecycle code and business process code combination.

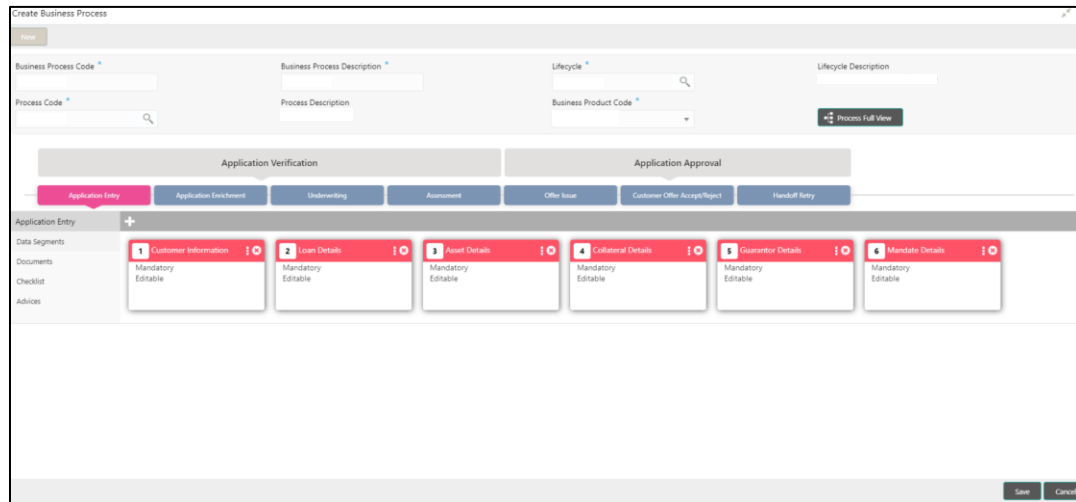
Field	Description
<b>Process Description</b>	Displays the description of the selected process code.
<b>Business Product Code</b>	Specify the business product code for which the business process is being created. Alternatively, system allows to select 'All', in which case the business process will be applicable to all the business products that are associated with the Lifecycle and Process Code.
<b>Save</b>	To save the captured details, click <b>Save</b> .
<b>Cancel</b>	Click <b>Cancel</b> to close the <b>Business Process</b> screen, it get closed without saving the data.

**NOTE:** System will allow you to configure only one business process for a combination of **Lifecycle** and **Business Product Code**.

4. Search and select the **Process Code**.

→ The **Create Business Process** screen with stages is displayed.

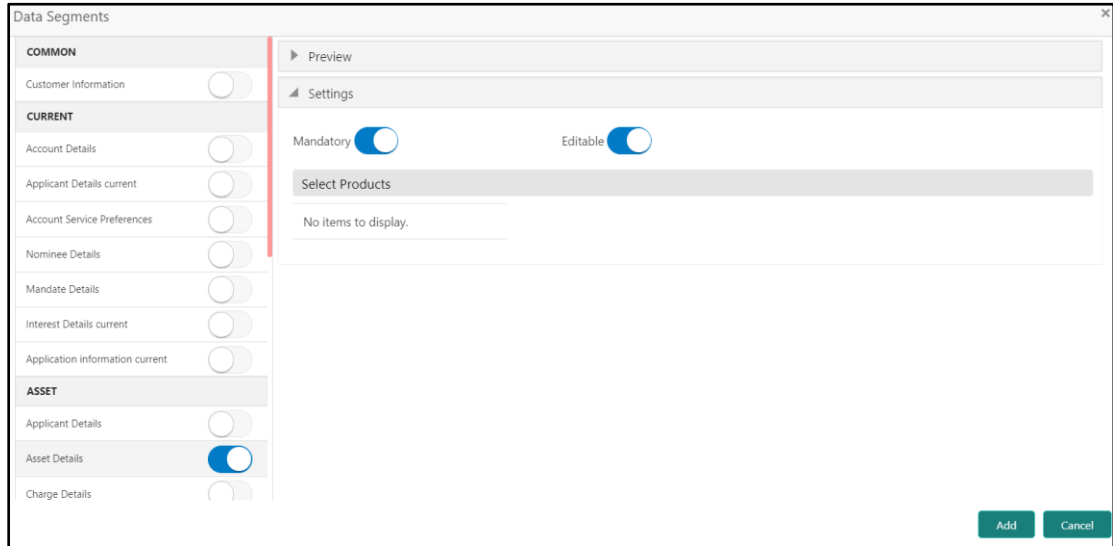
**Figure 8: Create Business Process screen with stages**



5. Click **Data Segments** tab and then click **+** icon on the header panel.

→ The **Data Segments** screen is displayed.

**Figure 9: Data Segments**



6. Select the required data segment or data segments for the selected stage, and specify the details in the relevant data fields. For more information on menus, refer to [Table 9: Data Segments - Field Description](#).

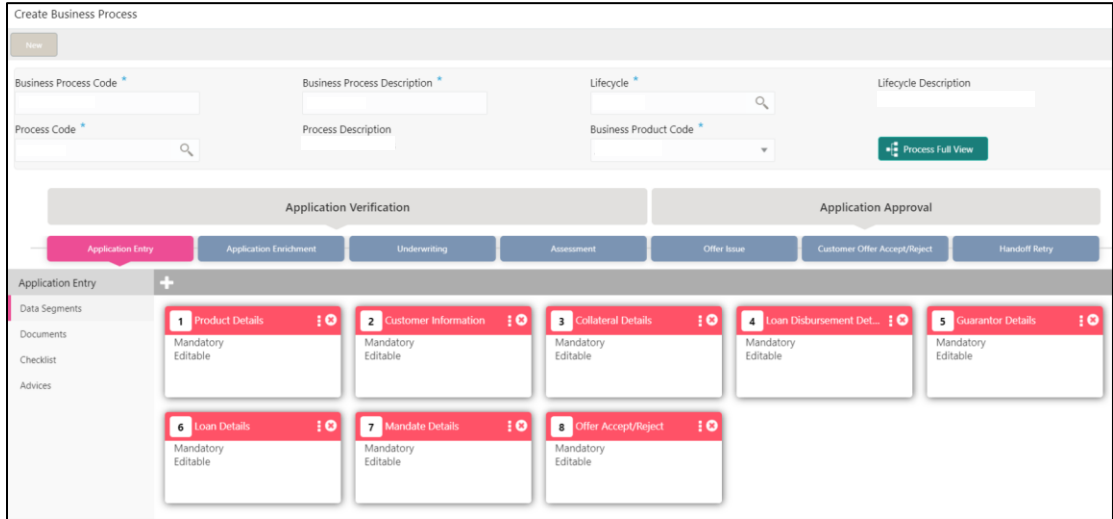
**Table 9: Data Segments - Field Description**

Field	Description
<b>Preview</b>	User can click on <b>Preview</b> tab to view the data segment.
<b>Settings</b>	Specify the settings.
<b>Mandatory</b>	Select if data segment is mandatory.
<b>Editable</b>	Select if data segment is editable.
<b>Select Products</b>	Select the Products for which the data segment is relevant.

6. Click **Add**.

→ The **Business Process Definition** screen is displayed with data added segment.

**Figure 10: Business Process Definition**

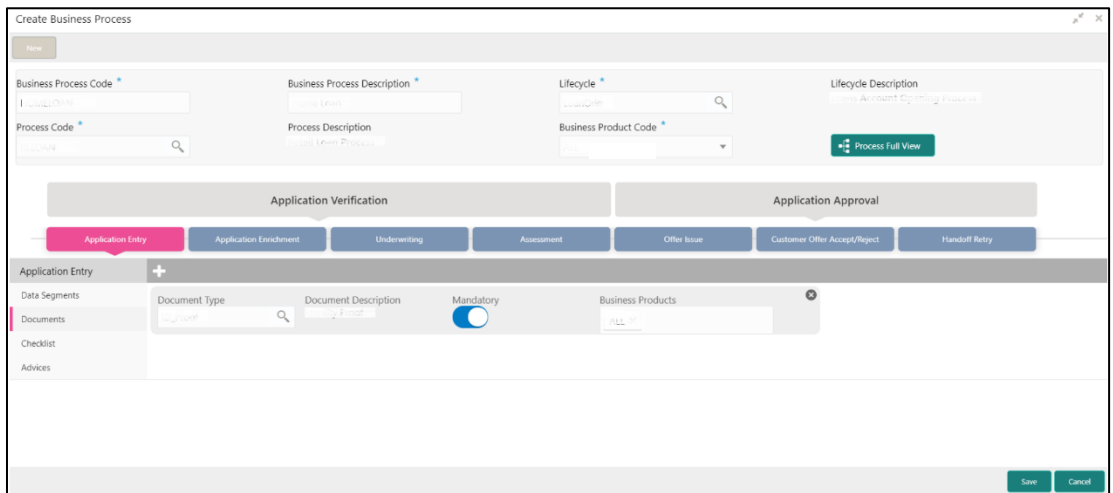


**NOTE:** System allows to re-sequence the data segment by dragging and dropping over the specific data segment.

7. Select the stage, and click **Document** tab to define the specific documentation requirement for different stage.

→ The **Create Business Process – Documents** segment is displayed.

**Figure 11: Create Business Process – Documents**



8. Specify the fields in the **Documents** segment. For more information on menus, refer to [Table 10: Create Business Process – Documents - Field Description](#).

**Table 10: Create Business Process – Documents - Field Description**

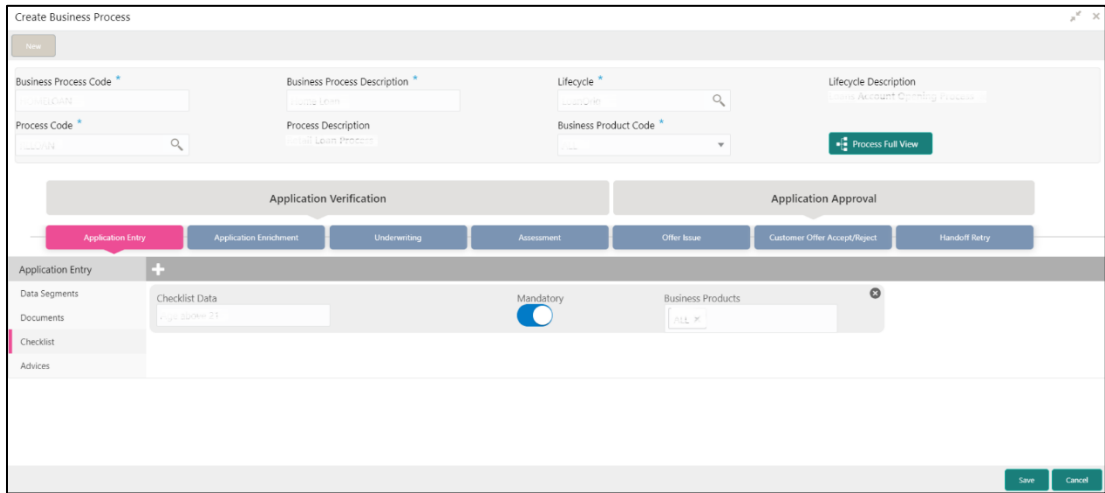
<b>Field</b>	<b>Description</b>
<b>Document Type</b>	Search and select the document type.
<b>Document Description</b>	Displays the corresponding description of the document.
<b>Mandatory</b>	Select if the document submission for the stage is mandatory.
<b>Business Products</b>	Select the required option for the document submission requirement. Available options are: <ul style="list-style-type: none"> <li>• Single Product</li> <li>• List of Products</li> <li>• All</li> </ul>
<b>Save</b>	To save the captured details, click <b>Save</b> .
<b>Cancel</b>	Click <b>Cancel</b> to close the <b>Business Process</b> screen, it get closed without saving the data.

9. Select the stage, and click **Checklist** tab.



→ The **Create Business Process – Checklist** segment is displayed.

**Figure 12: Create Business Process – Checklist**



10. Specify the fields in the **Checklist** segment. For more information on menus, refer [Table 11: Create Business Process – Checklist - Field Description](#).

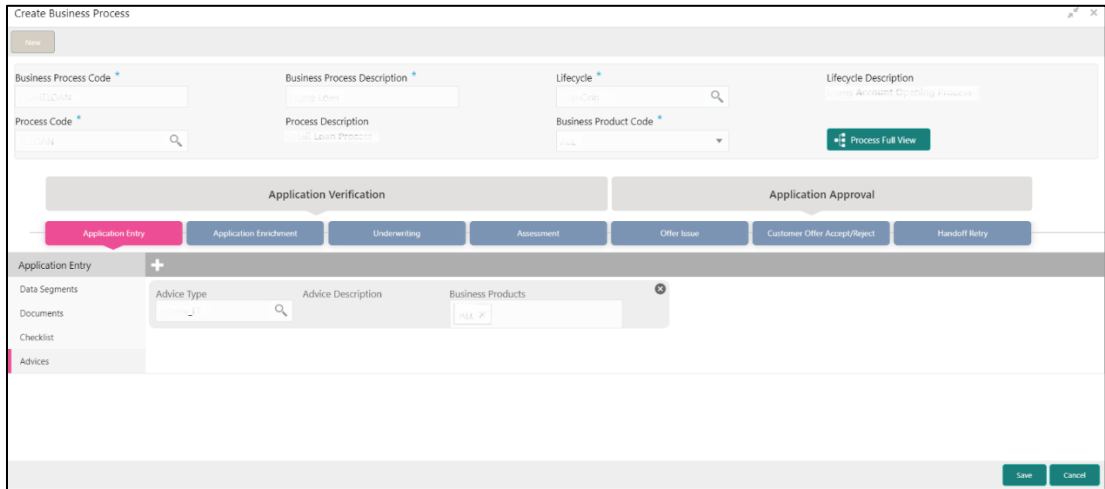
**Table 11: Create Business Process – Checklist - Field Description**

Field	Description
<b>Checklist Data</b>	It is a free-text field that allows to user to enter the checklists that must be validated as part of selected stage.
<b>Mandatory</b>	Select if the document submission for the stage is mandatory.
<b>Business Products</b>	Select the required option to restrict the checklist. Available options are: <ul style="list-style-type: none"> <li>• Single Product</li> <li>• List of Products</li> <li>• All</li> </ul>
<b>Save</b>	Click <b>Save</b> to save the captured details.
<b>Cancel</b>	Click <b>Cancel</b> to close the Business Process screen, it get closed without saving the data.

11. Select the stage, and click **Advices** tab.

→ The **Create Business Process – Advices** segment is displayed.

**Figure 13: Create Business Process – Advices**



12. Specify the fields in the **Advices** segment. For more information on menus, refer Table 12: Create Business Process – Advices - Field Description.

**Table 12: Create Business Process – Advices - Field Description**

Field	Description
<b>Advice Type</b>	Search and select the required advice type from the displayed list of all the valid advices maintained, and that must be mapped to this stage.
<b>Advice Description</b>	Displays the corresponding description of the advice.
<b>Business Products</b>	Select the required option to restrict the advices. Available options are: <ul style="list-style-type: none"> <li>• Single Product</li> <li>• List of Products</li> <li>• All</li> </ul>
<b>Save</b>	Click <b>Save</b> to save the captured details.
<b>Cancel</b>	Click <b>Cancel</b> to close the Business Process screen, it get closed without saving the data.

13. Click **Save** to create business process.

At this point, the status of business process is un-authorized. User with supervisor access has to approve the business process. Once approved, status of the business process changes from un-authorized to authorized, and is activated for usage in the Servicing Transactions.

## 2.3.2 View Business Process

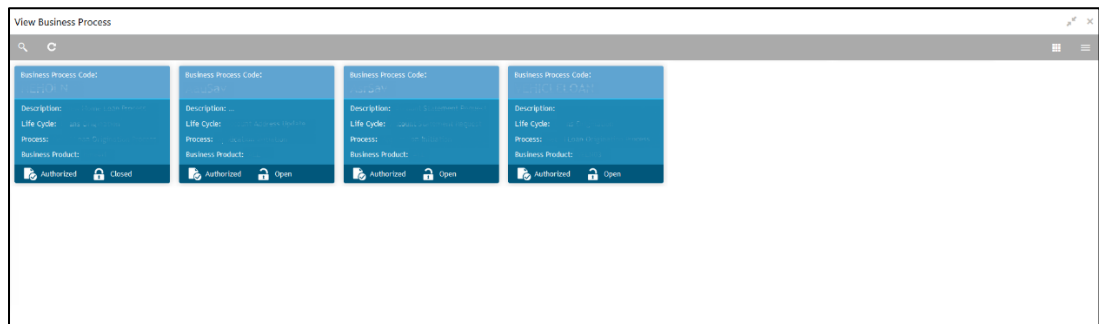
Oracle Banking Branch supports to view the business process created. The View Business Process allows the user to view all of the authorized, un-authorized and closed business process. Authorize option is also available for supervisor users for approving un-authorized business process.

To process this screen, type **View Business Process** 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. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Process**.
2. Under **Business Process**, click **View Business Product**.

→ The **View Business Process** screen is displayed.

**Figure 14: View Business Process**



Tiles representing the various Business Process in different state such as Open, In-Progress, Closed and in Authorized and Unauthorized status are visible in this process.

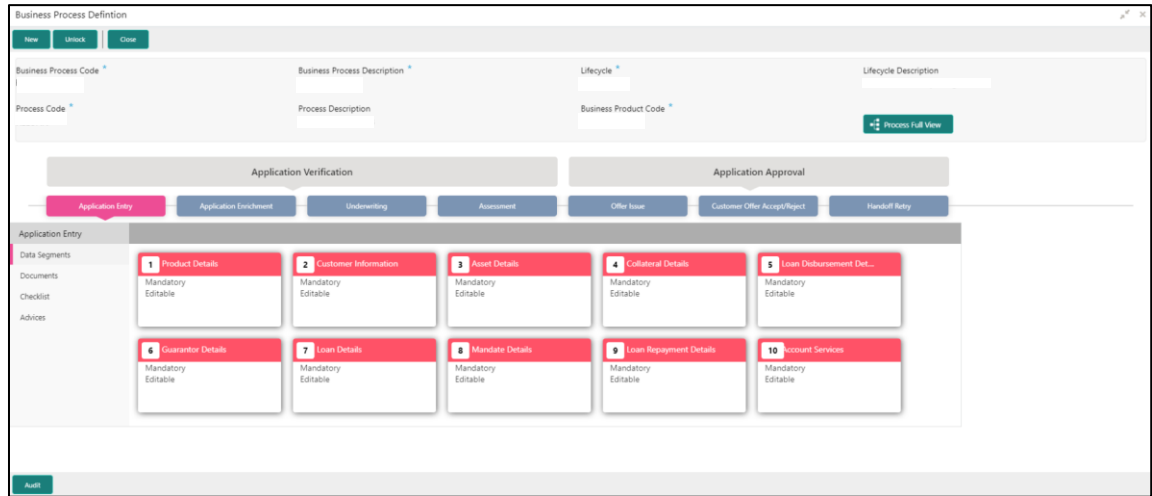
- Click on the **Business Process Tile** to select the specific business process.

**Pre-condition**

Only if business process is authorized.

→ The **Business Process Definition – Authorized** screen is displayed.

**Figure 15: Business Process Definition - Authorized Business Process**



For Authorized business process, available options are:

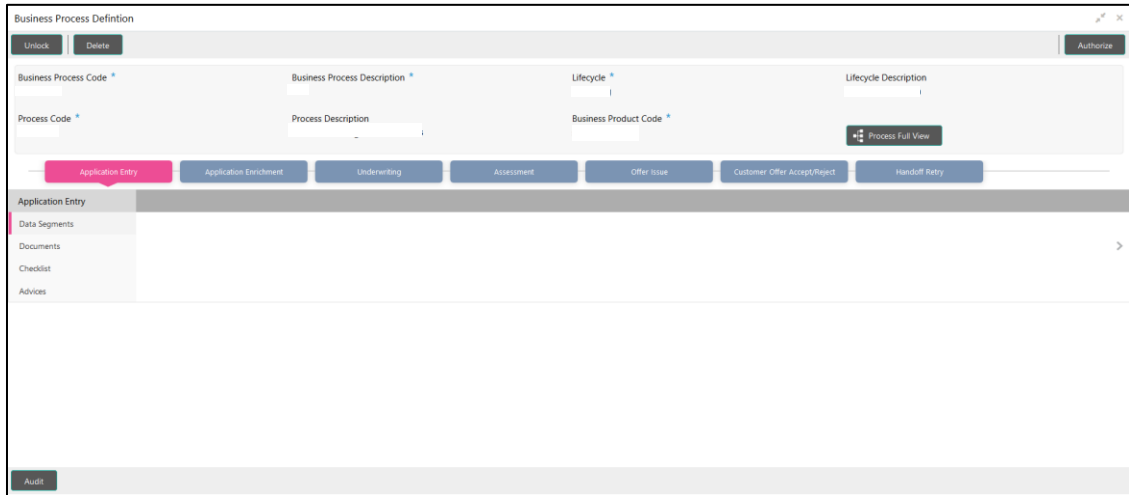
- New** – Click this button to create new business process.
- Unlock** – Click this button to edit the business process.
- Close** – Click this button to permanently deactivate the Business Process. Once closed, the Business Process cannot be used for Servicing transactions.

**Pre-condition**

Only if business process is un-authorized.

→ The **Business Process Definition – Un-authorized** screen is displayed.

**Figure 16: Business Process Definition – Un-authorized Business Process**



For un-authorized business process, available options are:

- **Unlock** - Click this button to edit the business process.
- **Delete** - Click this button to delete the business process.
- **Authorize** - User with authorization access will be able to view this button and will be able to authorize the record.

For more information on options, refer to [Table 13: View Business Process - Field Description](#).

**Table 13: View Business Process - Field Description**

Field	Description
<b>Unlock</b>	As specified in <a href="#">Figure 15</a> and <a href="#">Figure 16</a> , this option is common for authorized and un-authorized business product. Click <b>Unlock</b> to edit the business process information in Create Business Process data segment.

Field	Description
	<p>System will not allow to edit the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Business Process Code</b></li> <li>• <b>Process Code</b></li> <li>• <b>Lifecycle</b></li> </ul> <p>Make the required changes in the other relevant data segment and submit the business product.</p>
<b>Close</b>	<p>Click <b>Close</b> to close the business processes that are no more relevant for banking product offering. User can close only authorized business processes.</p>
<b>Authorize</b>	<p>User with supervisor access will be able to authorize the un-authorized business process. Once approved, the business process status changes to <b>Authorized</b>.</p>
<b>Delete</b>	<p>Click <b>Delete</b> to delete the business processes that are un-authorized and no more required.</p>

### 3 Annexure 1: Error Codes and Messages

This topic contains error codes and messages.

**Table 14: Error Codes and Messages**

<b>Error Code</b>	<b>Message</b>
GCS-AUTH-01	Record Successfully Authorized
GCS-AUTH-02	Valid modifications for approval were not sent. Failed to match
GCS-AUTH-03	Maker cannot authorize
GCS-AUTH-04	No Valid unauthroized modifications found for approval.
GCS-CLOS-01	Record Already Closed
GCS-CLOS-02	Record Successfully Closed
GCS-CLOS-03	Unauthorized record cannot be closed, it can be deleted before first authorization
GCS-COM-001	Record does not exist
GCS-COM-002	Invalid version sent, operation can be performed only on latest version
GCS-COM-003	Please Send Proper Modification Number
GCS-COM-004	Please send maker Id in the request
GCS-COM-005	Request is Null. Please Resend with Proper Values
GCS-COM-007	Request Successfully Processed
GCS-COM-008	Modifications should be consecutive.
GCS-COM-009	Resource ID cannot be blank or "null".
GCS-COM-010	You have successfully cancelled \$1.



<b>Error Code</b>	<b>Message</b>
GCS-DEL-001	Record deleted successfully
GCS-DEL-002	Record(s) deleted successfully
GCS-DEL-003	Modifications didnt match valid unauthorized modifications that can be deleted for this record
GCS-DEL-004	Send all unauthorized modifications to be deleted for record that is not authorized even once.
GCS-DEL-005	Only Maker of first version of record can delete modifications of record that is not once authorized.
GCS-DEL-006	No valid unauthroized modifications found for deleting
GCS-DEL-007	Failed to delete. Only maker of the modification(s) can delete.
GCS-MOD-001	Closed Record cannot be modified
GCS-MOD-002	Record Successfully Modified
GCS-MOD-003	Record marked for close, cannot modify.
GCS-MOD-004	Only maker of the record can modify before once auth
GCS-MOD-005	Not amendable field, cannot modify
GCS-MOD-006	Natural Key cannot be modified
GCS-MOD-007	Only the maker can modify the pending records.
GCS-REOP-003	Successfully Reopened
GCS-REOP-01	Unauthorized Record cannot be Reopened
GCS-REOP-02	Failed to Reopen the Record, cannot reopen Open records
GCS-REOP-03	Successfully Reopened

<b>Error Code</b>	<b>Message</b>
GCS-REOP-04	Unauthorized record cannot be reopened, record should be closed and authorized
GCS-SAV-001	Record already exists
GCS-SAV-002	Record Saved Successfully.
GCS-SAV-003	Congratulations!! The record is saved and validated successfully.
GCS-VAL-001	Congratulations!! Your record is successfully validated.
SRV_BP_001	Source stage value should be either Y/N not valid
SRV-BP-002	Cannot have more than one source stage
SRV-BP-003	Datasegment Code not valid
SRV-BP-004	DocumentType Code not valid
SRV-BP-005	LIFECYCLE not valid
SRV-BP-006	Unable to \$1 Business Process as \$2 datasegment has the following dependencies \$3 in lifecycle \$4 ,which have not been mapped prior to it!
SRV-BP-007	Unable to \$1 Business Process as the mandatory data segments \$2 for the \$3 lifecycle have not been mapped!
SRV-BP-008	In \$1 stage of \$2 Business Process,duplicate datasegements - \$3 are not allowed
SRV-BP-009	Record already exist with same Lifecycle and Business Product
SRV-BP-010	At \$1 in \$2 stage of \$3 Business Process,duplicate record for - \$4 exist

<b>Error Code</b>	<b>Message</b>
SRV-BP-011	At \$1 in \$2 stage of \$3 Business Process,Business Product List is invalid.
SRV-BP-012	Business Product Code is Invalid
SRV-BP-013	Stage \$1 should have atleast one datasegment attached
SRV-CMN-001	Exception Occurred while Executing Query
SRV-CMN-002	Number format exception
SRV-CMN-003	Server Error Occurred during API call
SRV-CMN-004	Illegal State Exception
SRV-CMN-006	Exception Occurred while creating Bean
SRV-CMN-007	Internal server error occurred

## 4 Annexure 2: Lifecycle Codes

This topic contains lifecycle codes and descriptions.

**Table 15: Lifecycle Codes**

<b>Lifecycle Code</b>	<b>Lifecycle Description</b>
CREATEINSTRUCTION	Create Standing Instruction
TRANSFERACCOUNT	Account Branch Transfer
SWEEPINNEW	Sweep In to CASA
SWEEPOUTNEW	Sweep Out to CASA
UPDNOM	Nominee Details Update
UPDJH	Joint Holder Create
UPDCRD	Update Card Status
TODCSR	Temporary Overdraft Limit Create
STOPCHEQUE	Stop Cheque Request
REQUESTACCOUNTSTMT	Account Statement Request
MODSI	Modify Si
CREATEAUTOTD	Auto Term Deposit
ASFSAV	Account Statement Frequency
AMTBLK	Amount Block
AdaSav9	Activate Dormant account
ACADRR	Update Account Address
AscSav	Account Status Change Create

## 5 Annexure 3: Process Codes

This topic contains process codes, stage codes, and descriptions.

**Table 16: Process Codes**

<b>Sequence</b>	<b>Process Code</b>	<b>Process Code Description</b>	<b>Stage Code</b>	<b>Stage Code Description</b>
1	CASAPC	CASA Application	CASAPC_INITIATION	CASA Application Entry
2	CASAPC	CASA Application	CASAPC_APPROVAL	CASA Application Approval
3	CASAPC	CASA Application	CASAPC_HANDOFF_RETRY	CASA HandOff Retry

## 6 Annexure 4: Data Segment List

This topic contains the list of data segments.

**Table 17: Data Segment List**

<b>Data Segment Code</b>	<b>Data Segment Name</b>
fsgbu-ob-remo-casa-ds-tmp-overdraft-mnt	Temporary Overdraft Limit
fsgbu-ob-remo-casa-ds-stand-inst	Scheduled Transfer
fsgbu-ob-remo-casa-ds-sweep-in	Sweep In to CASA
fsgbu-ob-remo-casa-ds-sweep-out	Sweep Out to CASA
fsgbu-ob-remo-casa-ds-accbrn-trn	Account Branch Transfer
fsgbu-ob-remo-casa-ds-card-status-change	Card Status Change
fsgbu-ob-remo-casa-ds-amount-block	Amount Block
fsgbu-ob-remo-casa-ds-accaddr-update	Account Address Update
fsgbu-ob-remo-casa-ds-modify-stand-inst	Modify SI
fsgbu-ob-remo-casa-ds-nominee-details	Nominee Details
fsgbu-ob-remo-casa-ds-view-stand-inst	Modify SI View
fsgbu-ob-remo-casa-ds-accsttreq	Account Statement Request
fsgbu-ob-remo-casa-ds-jnthlderdtls-update	Joint Holder Details Update
fsgbu-ob-remo-casa-ds-accstntfreq-update	Account Statement Frequency
fsgbu-ob-remo-casa-ds-stopcheque	Stop Cheque Request
fsgbu-ob-remo-casa-ds-autotd	Auto TD Instruction
fsgbu-ob-remo-casa-ds-acct-status-change	Account Status Change
fsgbu-ob-remo-casa-ds-actdac	Activate Dormant Account

## 7 List of Menus

1. Create Business Product - [Create Business Product](#) (pg. 5)
2. View Business Product - [View Business Product](#) (pg. 12)
3. Create Business Process - [Create Business Process](#) (pg. 16)
4. View Business Process - [View Business Process](#) (pg. 25)