

Getting Started User Guide

Oracle Banking Enterprise Limits and Collateral Management Cloud Service

Release 14.6.0.0.0

Part No. F79487-01

December 2022

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

www.oracle.com/financialservices/

Copyright © 2022, Oracle and/or its affiliates. All rights reserved.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

1. Welcome to Getting Started User Guide	1-1
1.1 Accessing Application.....	1-1

1. Welcome to Getting Started User Guide

This guide helps you get started with Oracle Banking applications and explains the basic design of Oracle and the common operations that you can follow while using it.

This document is intended for the Customer Service Representatives (CSRs) and staff in charge of setting up new products in your bank.

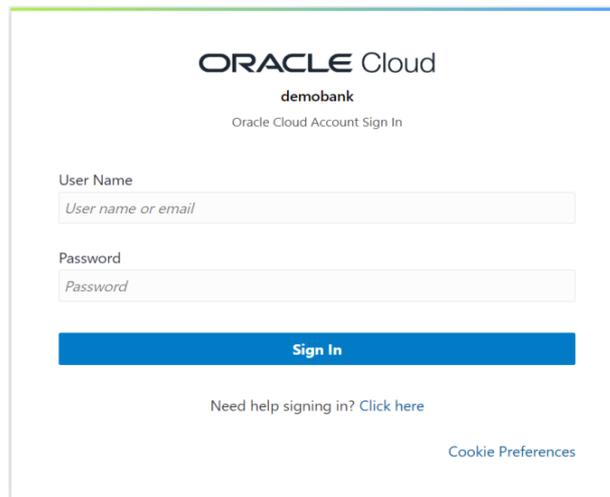
This section contains the following topics:

- [Section 1.1, "Accessing Application"](#)

1.1 Accessing Application

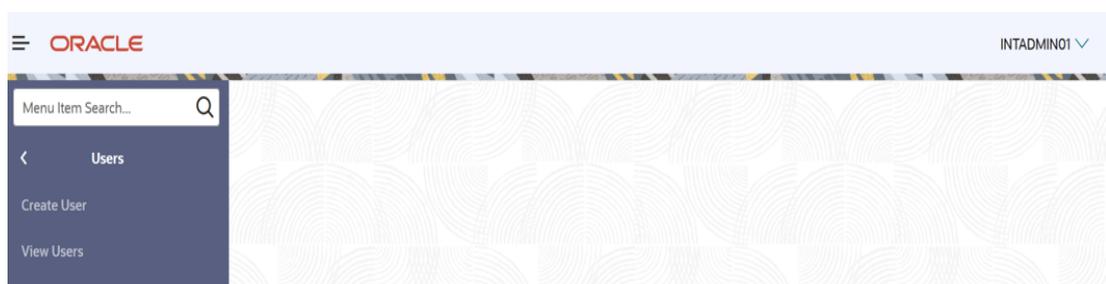
You can access any application using the link provided by the administrator. Contact the administrator for the URL and the login credentials. For more information on **Users and Roles**, refer to **Security Management System User Guide**.

1. Specify the URL in the browser address and press **Enter**. The application **Sign In** page appears.



The screenshot shows the Oracle Cloud demobank Sign In page. At the top, it says "ORACLE Cloud" and "demobank". Below that, it says "Oracle Cloud Account Sign In". There are two input fields: "User Name" with a placeholder "User name or email" and "Password" with a placeholder "Password". Below the input fields is a blue "Sign In" button. At the bottom, there is a link "Need help signing in? Click here" and a link "Cookie Preferences".

2. Login to application with multi entity admin user.



3. Create **Entity Admin Users** and select **DEFAULTENTITY** in Entity Mapping. Enable **Home Entity** and **Entity Admin** for the selected entity.

Create User

User Details

User ID: OBELCMNTAD1 User Name: OBELCMNTAD1 Locale: en_US Language Code: ENG

Email ID: srini@gmail.com Start Date: May 26, 2023 End Date: June 20, 2024

Entity Mapping

Entity ID	Home Entity	Entity Admin
DEFA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1 (1 of 1 items)

Create User

User Details

User ID: OBELCMNTAD2 User Name: OBELCMNTAD2 Locale: en_US Language Code: ENG

Email ID: srini@gmail.com Start Date: May 26, 2023 End Date: June 20, 2024

Entity Mapping

Entity ID	Home Entity	Entity Admin
DEFA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1 (1 of 1 items)

4. Create IDCS users for entity admin users.
5. Create a role **OBELCM_ROLE** using entity admin user.

Create Role

Role Code: OBELCM_ROLE Description: Role for ELCM operations

0 Selected Delete Search By Functional Activity Code Add

Functional Activity Code	Functional Activity Description
<input type="checkbox"/> OBELCM_MENU_FA_DASHBOARD	OBELCM Dashboard

Page 1 of 1 (1 of 1 items)

6. Create Business users using entity admin user and map the required roles and application to the business users.

Create User ⌵ ⌵ ×

User Details

Name: Login ID: Home Branch: Q

Status

User Status: Status Changed On: Is Supervisor: Manager ID: Q

Start Date: 📅 End Date: 📅 System User:

Create User ⌵ ⌵ ×

User Details

Name: Login ID: Home Branch: Q

Status

User Status: Status Changed On: Is Supervisor: Manager ID: Q

Start Date: 📅 End Date: 📅 System User:

User Role Branches + 🗑️

	Branch Code	Role Code	Role Description
<input type="checkbox"/>	111	OBELCM_ROLE	Role for OBELCM Menu
<input type="checkbox"/>	111	ENTITY_ADMIN_ROLE	Default role for initial login

Page 1 of 1 (1-2 of 2 items) |< < 1 > >|

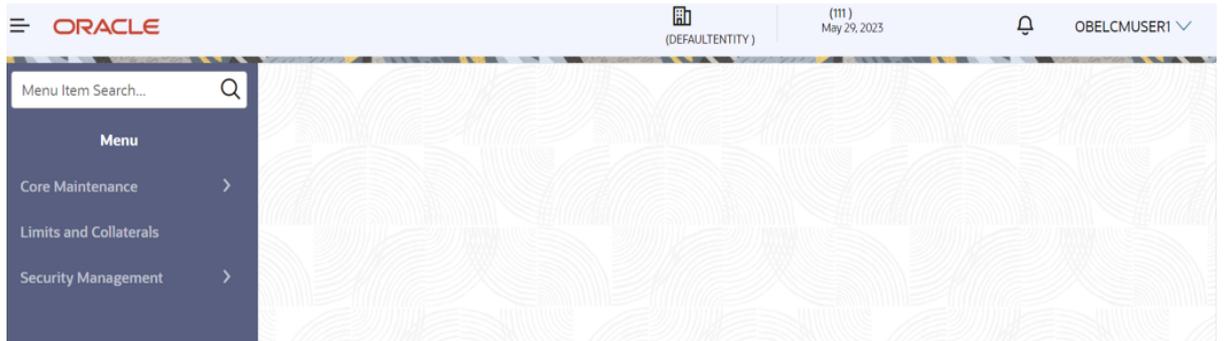
User Applications ☑️ Select All Applications

	Application Name	Application Description
<input type="checkbox"/>	SMS	Q Security Management System
<input type="checkbox"/>	CMC	CMC
<input type="checkbox"/>	OBELCM	OBELCM

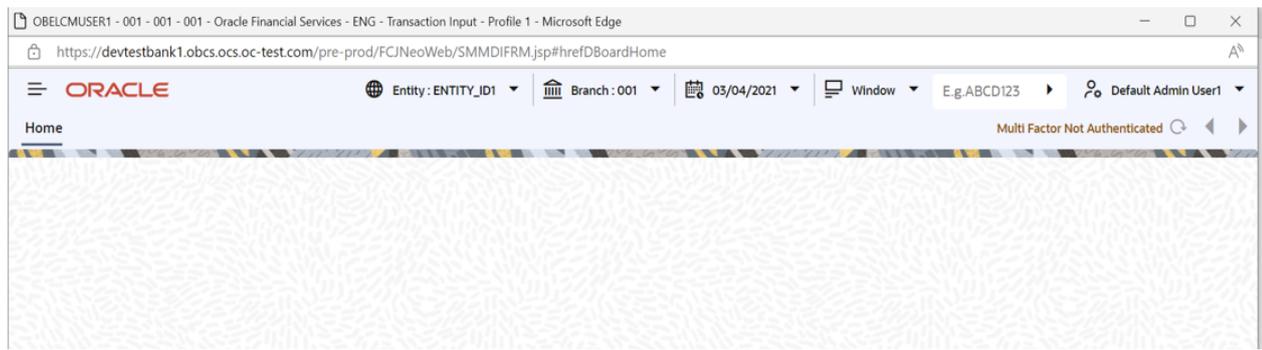
Page 1 of 1 (1-3 of 3 items) |< < 1 > >|

7. Create IDCS users for business users.

8. Login to application using business users.



9. Launch **Limits and Collaterals** from menu.



10. To Log out:

1. In the selected application navigate to the **Toolbar**.
2. Under **Toolbar**, click the user name logged into the application. The User Profile fly-out menu appears.
3. Select **Log out**.

