

Getting Started User Guide

# **Oracle Banking Enterprise Limits and Collateral Management Cloud Service**

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Getting Started User Guide  
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# Contents

<b>1.</b>	<b>Welcome to Getting Started User Guide.....</b>	<b>3</b>
1.1	Accessing Application.....	3
1.1.1	<i>Signing In</i> .....	3
1.1.2	<i>Signing Out</i> .....	4
1.2	Application Environment.....	5
1.3	How to's.....	5
1.3.1	<i>Enable OBELCM Menu in App-Shell</i> .....	5
1.3.2	<i>Create new business users for OBELCM</i> .....	10

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# 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"](#)
- [Section 1.2, "Application Environment"](#)
- [Section 1.3, "How to's"](#)

## 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.

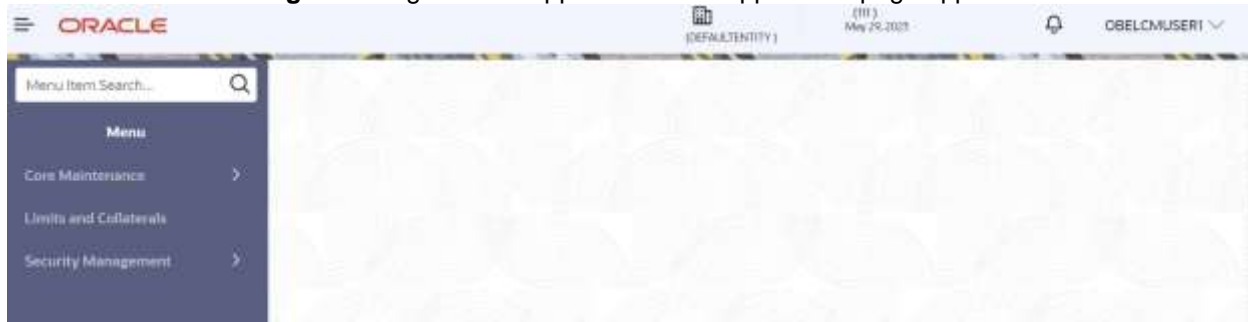
### 1.1.1 Signing In

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



2. Provide the required information.
  - **User Name:** Specify the user name provided by the administrator.
  - **Password:** Specify the password provided by the administrator.

3. Click **Sign In** to log in to the application. The application page appears.

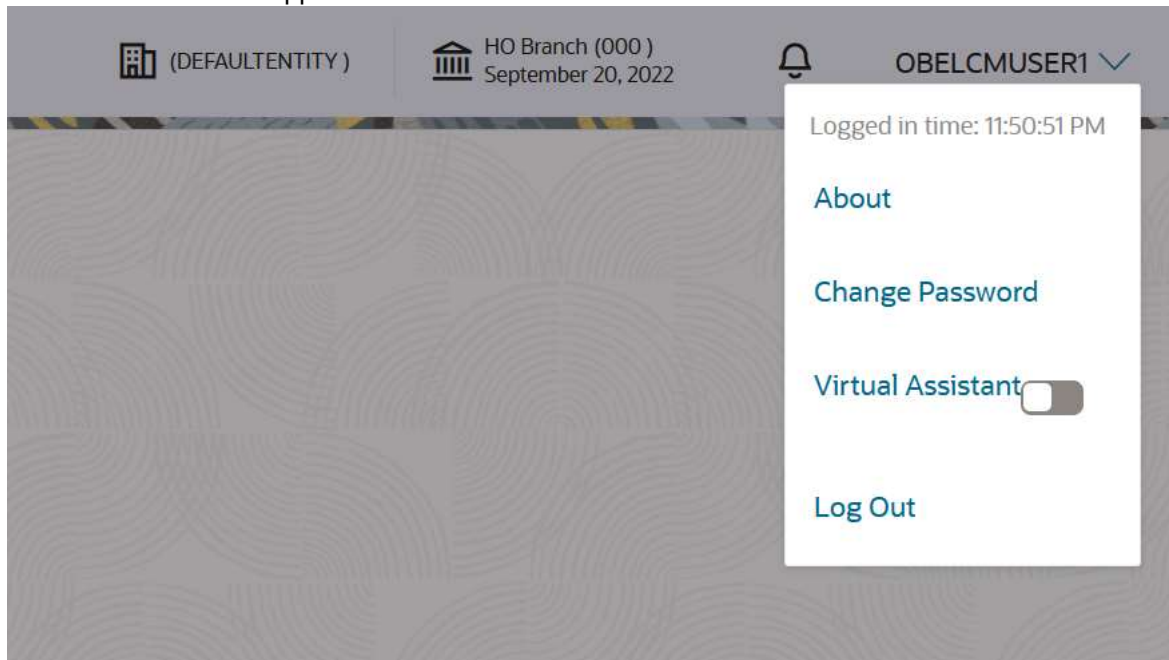


4. Click **Limits and Collaterals** to go to OBELCM main page.



## 1.1.2 Signing 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.



## 1.2 Application Environment

On successful login, the selected application environment appears depending on the user privileges.

A sample screenshot of Application Environment is shown below:



## 1.3 How to's

As a subscriber, you must create different sets of users to navigate between the App-shell and the OBELCM page. This guide explains how to create different set of users and establish link between the App-shell and the OBELCM page:

- [Section 1.3.1, "Enable OBELCM Menu in App-Shell"](#)
- [Section 1.3.2, "Create new business users for OBELCM"](#)

### 1.3.1 Enable OBELCM Menu in App-Shell

A Multi-Entity Admin user must take further actions following the successful provisioning of Oracle Banking Enterprise Limits and Collateral Management Cloud Services to:

- Create new Entity Admin Users (if not already created as part of other cloud services setup).
- Entity Admin Users map OBELCM functional activity codes to an existing role or a newly generated role.
- Entity Admin users create business users. The first two business users must be as mentioned in the detailed step below, and then an Entity Admin user can create new business users with the User ID of his/her choice.

Following are the detailed sections for the above-mentioned requirements:

- [Section 1.3.1.1, "Create Entity Admin User"](#)
- [Section 1.3.1.2, "Create Role"](#)
- [Section 1.3.1.3, "Create Business User"](#)
- [Section 1.3.1.4, "Verify Limits and Collaterals Menu Link"](#)

### 1.3.1.1 Create Entity Admin User

1. The subscriber for OBELCM Cloud Service is identified as a multi-entity admin user.
2. Sign-In to App Shell application using multi entity admin user credential.



3. The multi entity admin user creates entity admin users, for example, **OBELCMMENTAD1** and **OBELCMMENTAD2**.

**Create User**

User Details

User ID OBELCMMENTAD1	User Name OBELCMMENTAD1	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
DEFAI	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1 (1 of 1 items)

**Create User**

User Details

User ID OBELCMMENTAD2	User Name OBELCMMENTAD2	Locale en_US	Language Code ENG
Email ID srini@gmail.com	Start Date May 26, 2023	End Date June 20, 2024	

Entity Mapping

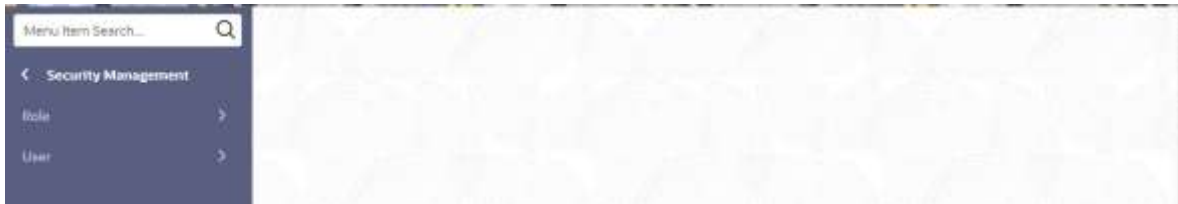
Entity ID	Home Entity	Entity Admin
DEFAI	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 1 (1 of 1 items)

4. Log Out from the App Shell application.
5. Create IDCS users for OBELCMMENTAD1 and OBELCMMENTAD2

### 1.3.1.2 Create Role

1. Sign In again to App Shell with entity admin users **OBELCMMENTAD1**, to create role.



2. Create the role **OBELCM\_ROLE** using entity admin user **OBELCMMENTAD1** and authorize it with entity admin user **OBELCMMENTAD2**.

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#### Note

The above-mentioned role, **OBELCM\_ROLE**, is an example. The entity admin user can select a role name of his/her choice.

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A screenshot of the 'Create Role' form in the App Shell. The form has a title bar 'Create Role' with window controls. It contains two input fields: 'Role Code' with the value 'OBELCM\_ROLE' and 'Description' with the value 'Role for ELCM operations'. Below these is a table with columns 'Functional Activity Code' and 'Functional Activity Description'. The table has one row with the values 'OBELCM\_MENU\_FA\_DASHBOARD' and 'OBELCM Dashboard'. At the bottom, there is a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and a '1' in a box. There are also buttons for 'Selected', 'Delete', 'Search By Functional Activity Code', and 'Add'.

3. Map functional activity code **OBELCM\_MENU\_FA\_DASHBOARD** corresponding to OBELCM menu to the role **OBELCM\_ROLE**.



### 1.3.1.3 **Create Business User**

1. OBELCM provisions two factory-shipped user IDs:
  - OBELCMUSER1 (factory-shipped user 1)
  - OBELCMUSER2 (factory-shipped user 2)

The Entity Admin user must create these users without changing the mentioned user ID values; otherwise, the menu from the App Shell does not link to the OBELCM Application. These business users are the OBELCM Admin Users.

2. Create business users **OBELCMUSER1** and **OBELCMUSER2** using entity admin user **OBELCMMENTAD1** and authorize it with entity admin user **OBELCMMENTAD2**.

The screenshot shows the 'Create User' form with the following fields and values:

- User Details:**
  - Name: OBELCMUSER1
  - Login ID: OBELCMUSER1
  - Home Branch: T11
- Status:**
  - User Status: Enable
  - Status Changed On: (empty)
  - Is Supervisor: (unchecked)
  - Manager ID: (empty)
  - Start Date: May 29, 2023
  - End Date: (empty)
  - System User: (unchecked)

The screenshot shows the 'Create User' form with the following fields and values:

- User Details:**
  - Name: OBELCMUSER2
  - Login ID: OBELCMUSER2
  - Home Branch: T11
- Status:**
  - User Status: Enable
  - Status Changed On: (empty)
  - Is Supervisor: (unchecked)
  - Manager ID: (empty)
  - Start Date: May 29, 2023
  - End Date: (empty)
  - System User: (unchecked)

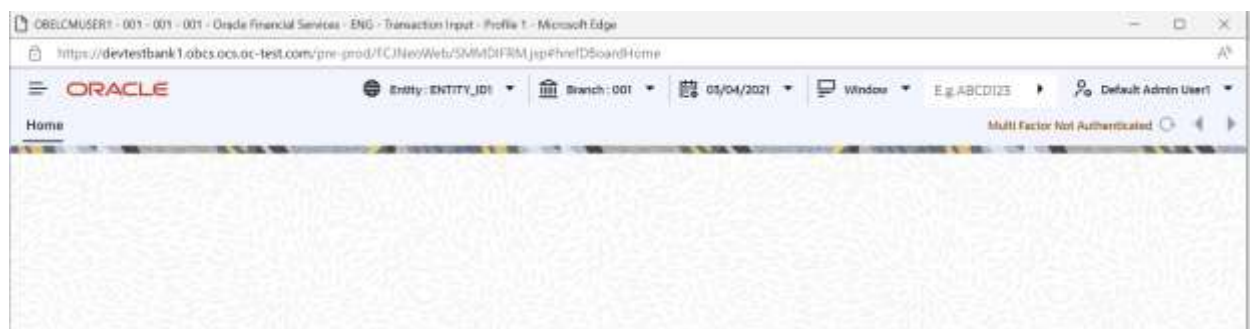
3. Map the business users **OBELCMUSER1** and **OBELCMUSER2** to the role created in Section 1.3.1.2, "Create Role", Step 2
4. Log Out from the App Shell application.

#### 1.3.1.4 Verify Limits and Collaterals Menu Link

1. Sign In to the App Shell application with business users **OBELCMUSER1** and **OBELCMUSER2** to see the Limits and Collaterals in the menu.



2. Click on Limits and Collaterals menu to launch OBELCM landing page.



### 1.3.2 **Create new business users for OBELCM**

An Entity Admin user can create additional business users as needed after creating a role and mapping the factory-shipped business users. For these business users, the user ID can be chosen appropriately. The same user IDs must be replicated in the OBELCM application once they have been created in App-Shell.

Following are the detailed sections for the above-mentioned requirements:

- [Section 1.3.2.1, "Create new Business Users in App Shell"](#)
- [Section 1.3.2.2, "Replicate Business Users in OBELCM"](#)

#### 1.3.2.1 **Create new Business Users in App Shell**

1. Sign-In to App Shell with OBELCM Admin user OBELCMUSER1.



2. Go to **Menu -> Security Management -> User -> Create User**. Enter the necessary information on screen to create new Business User. Below is an example for reference.

The 'Create User' form is divided into three main sections: User Details, Status, and Other Details. The User Details section includes fields for Login ID (OBELCMB1), Name (OBELCMB1), and Home Branch (000). The Status section includes fields for User Status (Enable), Status Changed On, Is Supervisor (toggle), Manager ID, Start Date (September 20, 2022), End Date (November 29, 2023), and System User (toggle). The Other Details section is currently empty. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. In the **Create User** screen scroll down to User Role Branches section and map the Branch and Role to this user.

The 'Create User' form is shown with the 'User Role Branches' section expanded. It contains a table with columns: Branch Code, Role Code, and Role Description. The table has one row with Branch Code '000' and Role Code 'OBELCM\_ROLE'. Below the table, there is a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and navigation buttons. At the top right of the section, there are '+', '-', and 'X' icons.

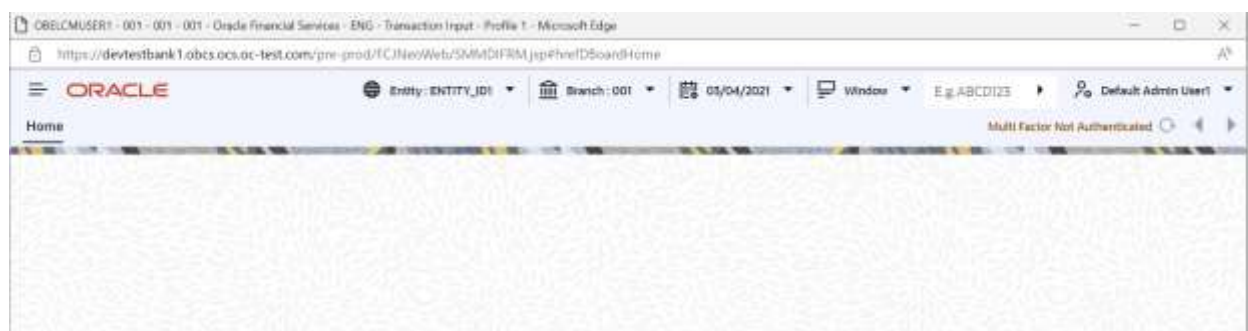
4. Save the user and authorize it with **OBELCMUSER2**.

### 1.3.2.2 Replicate Business Users in OBELCM

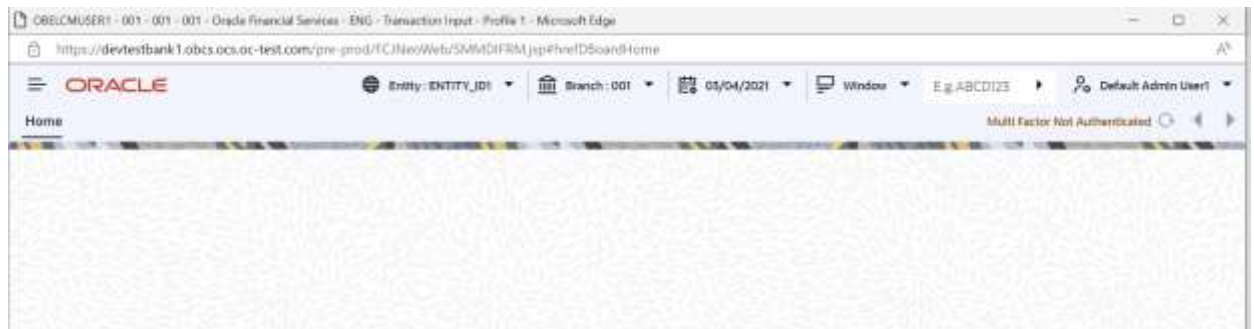
1. Sign-In to the App Shell application with Admin User **OBELCMUSER1**.



2. Click on Limits and Collaterals menu to launch OBELCM landing page.



3. Go to the **User Creation** screen as per the steps that follow:
  - Type function ID **SSDUSRDF** in the field at the top right corner of the Application tool bar.
  - Click on the adjoining arrow button.



4. The **User Creation** screen is shown below:

Refer to **Section 2.10, Common Core - Security Management System User Guide** for more details about the User Creation screen.

5. The user ID for new business users in App shell and OBELCM application must match.
6. The user ID for new business users in User Identification and LDAP DN field must match.