

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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# 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.

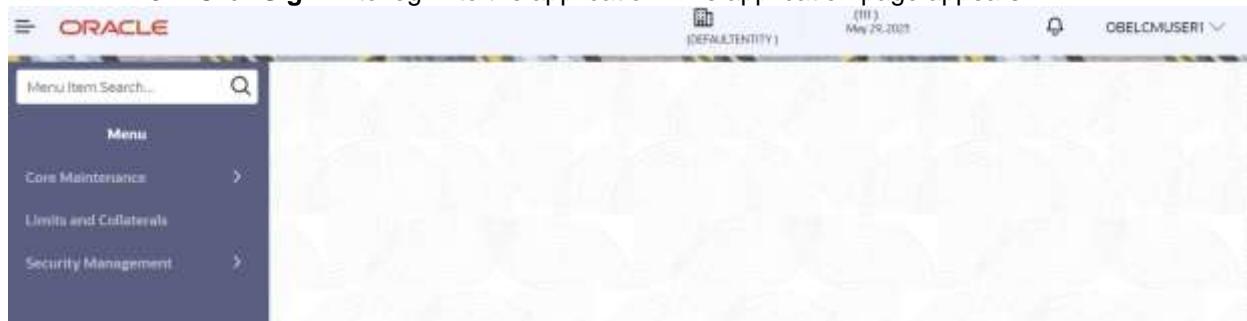
### 1.1.1 Signing In

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.

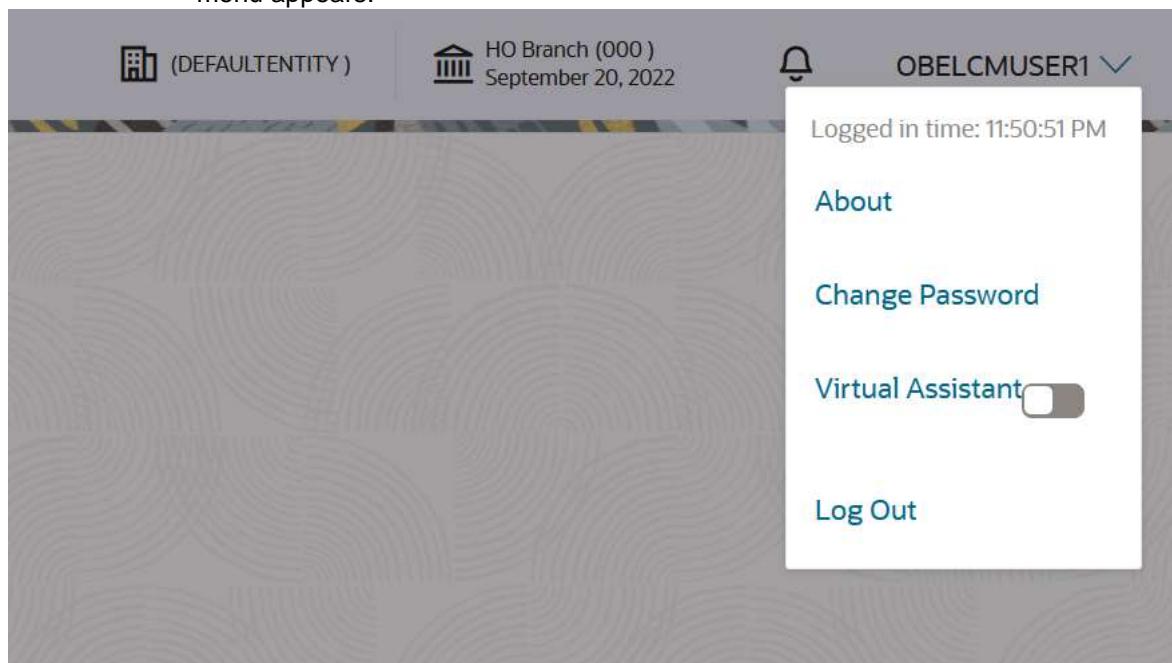


4. Click **Limits and Collaterals** to go to OBELCM main page.



### 1.1.2 Signing Out

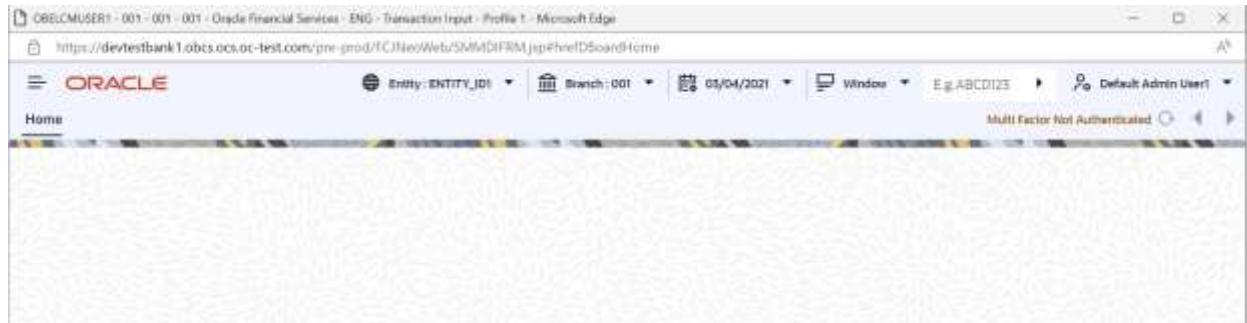
1. In the selected application, navigate to the Toolbar.
2. Under Toolbar, click the user name logged into the application. The User Profile fly-out menu appears.



## 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, **OBELCMENTAD1** and **OBELCMENTAD2**.

**Create User**

User Details

User ID: OBELCMENTAD1	User Name: OBELCMENTAD1	Locale: en_US	Language Code: ENG
Email ID: srim@gmail.com	Start Date: May 26, 2025	End Date: June 20, 2024	

Entity Mapping

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

Page: 1 of 1 (1 of 1 items) | < | > | 1 |

**Create User**

User Details

User ID: OBELCMENTAD2	User Name: OBELCMENTAD2	Locale: en_US	Language Code: ENG
Email ID: srim@gmail.com	Start Date: May 26, 2025	End Date: June 20, 2024	

Entity Mapping

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

Page: 1 of 1 (1 of 1 items) | < | > | 1 |

4. Log Out from the App Shell application.
5. Create IDCS users for OBELCMENTAD1 and OBELCMENTAD2

### 1.3.1.2 Create Role

1. Sign In again to App Shell with entity admin users **OBELCMENTAD1**, to create role.



2. Create the role **OBELCM\_ROLE** using entity admin user **OBELCMENTAD1** and authorize it with entity admin user **OBELCMENTAD2**.

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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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**Create Role**

Role Code	Description
OBELCM_ROLE	Role for ELCM operations

**Selected**

Functional Activity Code	Functional Activity Description
OBELCM_MENU_FAASHBOARD	OBELCM Dashboard

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

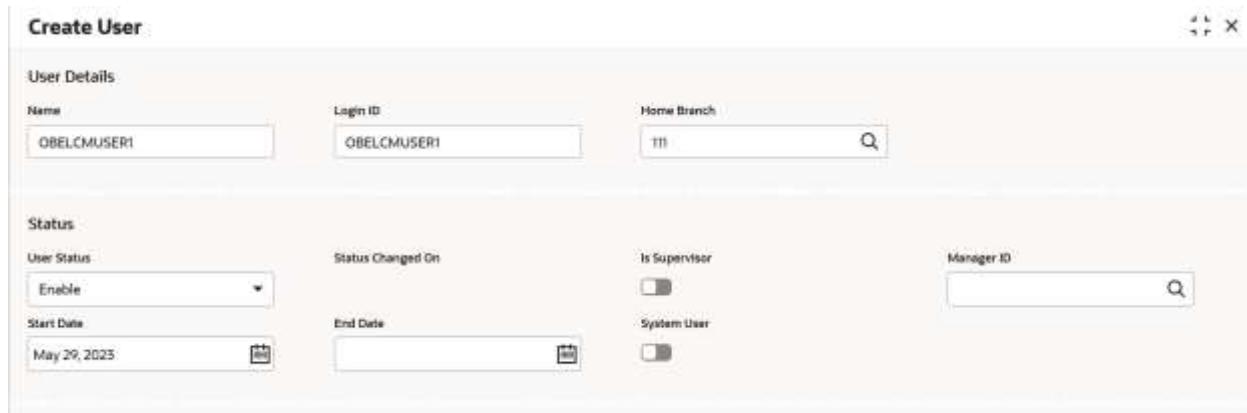
3. Map functional activity code **OBELCM\_MENU\_FA\_DASHBOARD** corresponding to OBELCM menu to the role **OBELCM\_ROLE**.

### 1.3.1.3 Create Business User

1. OBEBCM provisions two factory-shipped user IDs:
  - OBEBCMUSER1 (factory-shipped user 1)
  - OBEBCMUSER2 (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 OBEBCM Application. These business users are the OBEBCM Admin Users.

2. Create business users **OBEBCMUSER1** and **OBEBCMUSER2** using entity admin user **OBELCMENTAD1** and authorize it with entity admin user **OBELCMENTAD2**.



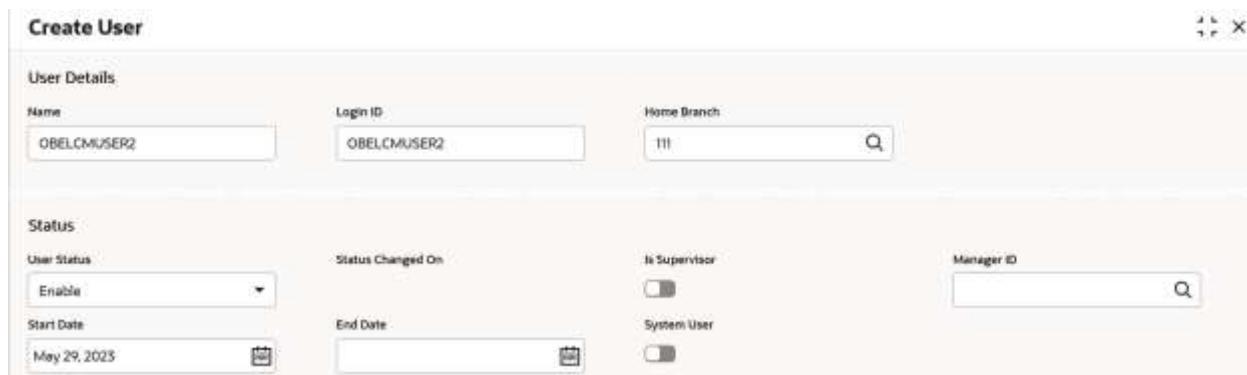
**Create User**

User Details

Name	OBELCMUSER1	Login ID	OBELCMUSER1	Home Branch	111	<input type="button" value="Search"/>
------	-------------	----------	-------------	-------------	-----	---------------------------------------

Status

User Status	Enable	Status Changed On	End Date	Is Supervisor	Manager ID
Start Date	May 29, 2023	<input type="button" value=""/>	<input type="button" value=""/>	<input type="checkbox"/>	<input type="text"/>
				<input type="checkbox"/>	



**Create User**

User Details

Name	OBELCMUSER2	Login ID	OBELCMUSER2	Home Branch	111	<input type="button" value="Search"/>
------	-------------	----------	-------------	-------------	-----	---------------------------------------

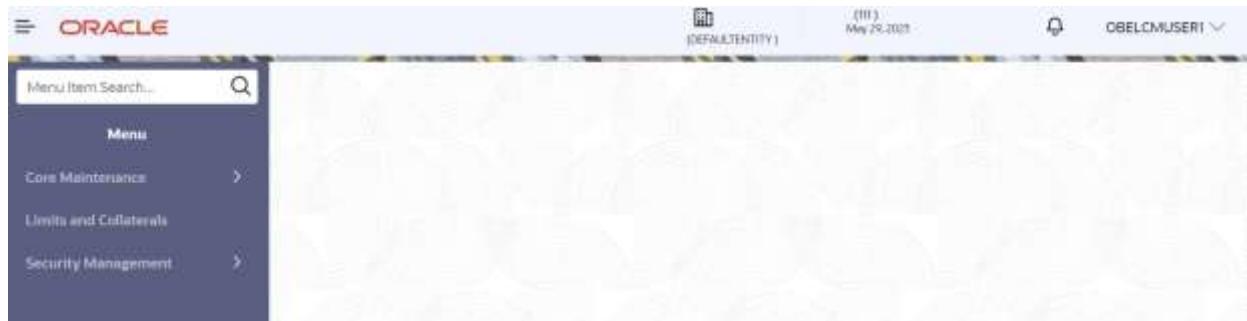
Status

User Status	Enable	Status Changed On	End Date	Is Supervisor	Manager ID
Start Date	May 29, 2023	<input type="button" value=""/>	<input type="button" value=""/>	<input type="checkbox"/>	<input type="text"/>
				<input type="checkbox"/>	

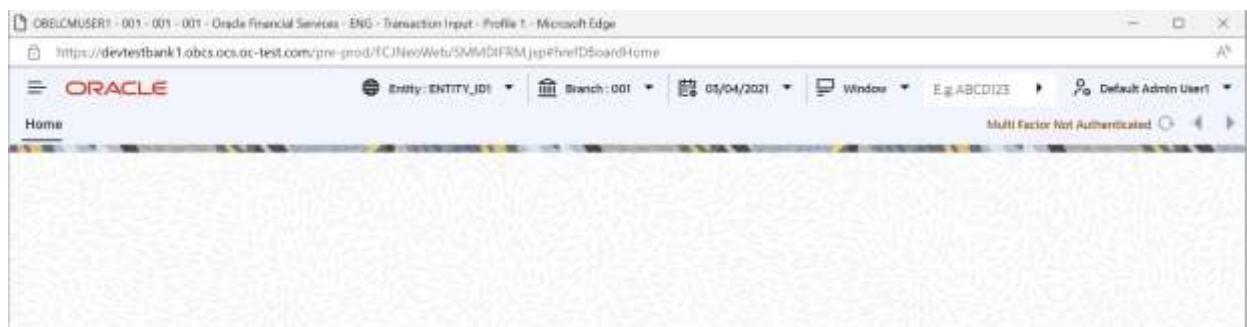
3. Map the business users **OBEBCMUSER1** and **OBEBCMUSER2** to the role created in Section 1.3.1.2, "Create Role", Step 2
4. Log Out from the App Shell application.

#### 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

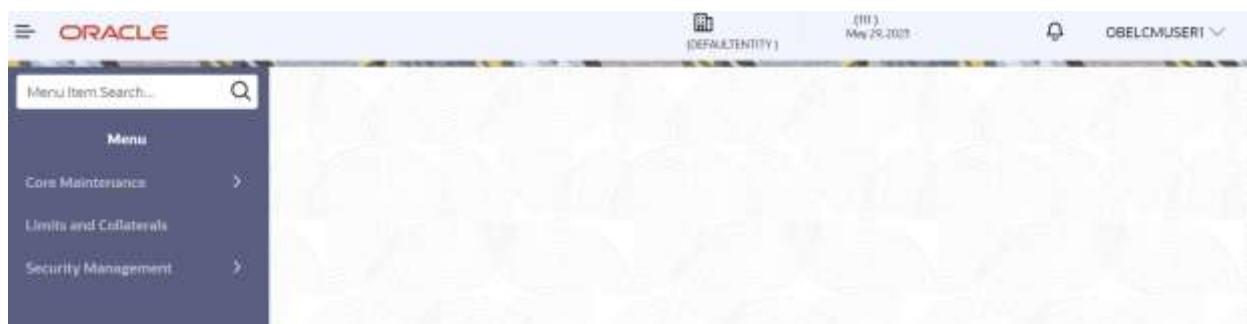
An Entity Admin user can create additional business users as needed after creating a role and mapping the factory-shipped business users. For these business users, the user ID can be chosen appropriately. The same user IDs must be replicated in the OBELCM application once they have been created in App-Shell.

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.

**Create User**

<b>User Details</b> <table border="1"> <tr> <td>Login ID: OBELCM1</td> <td>Name: OBELCM1</td> <td>Home Branch: 000</td> <td><input type="button" value="Q"/></td> </tr> </table>				Login ID: OBELCM1	Name: OBELCM1	Home Branch: 000	<input type="button" value="Q"/>				
Login ID: OBELCM1	Name: OBELCM1	Home Branch: 000	<input type="button" value="Q"/>								
<b>Status</b> <table border="1"> <tr> <td>User Status: Enable</td> <td>Status-Changed On: <input type="button" value=""/></td> <td>Is Supervisor: <input type="checkbox"/></td> <td>Manager ID: <input type="button" value="Q"/></td> </tr> <tr> <td>Start Date: September 20, 2022</td> <td>End Date: November 29, 2023</td> <td>System User: <input type="checkbox"/></td> <td></td> </tr> </table>				User Status: Enable	Status-Changed On: <input type="button" value=""/>	Is Supervisor: <input type="checkbox"/>	Manager ID: <input type="button" value="Q"/>	Start Date: September 20, 2022	End Date: November 29, 2023	System User: <input type="checkbox"/>	
User Status: Enable	Status-Changed On: <input type="button" value=""/>	Is Supervisor: <input type="checkbox"/>	Manager ID: <input type="button" value="Q"/>								
Start Date: September 20, 2022	End Date: November 29, 2023	System User: <input type="checkbox"/>									
<b>Other Details</b> <table border="1"> <tr> <td><input type="button" value="Cancel"/></td> <td><input type="button" value="Save"/></td> </tr> </table>				<input type="button" value="Cancel"/>	<input type="button" value="Save"/>						
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>										

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

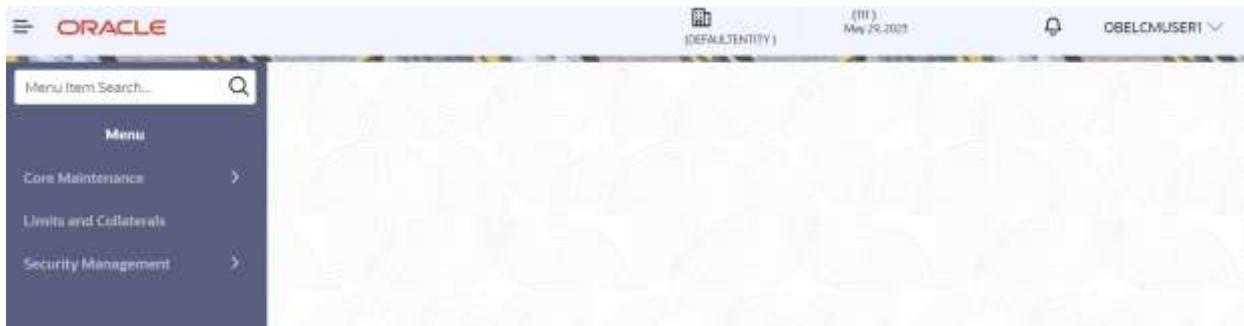
**Create User**

<b>User Role Branches</b> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Branch Code</th> <th>Role Code</th> <th>Role Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>000</td> <td>OBELCM_ROLE</td> <td><input type="button" value="Q"/></td> </tr> </tbody> </table>				<input type="checkbox"/>	Branch Code	Role Code	Role Description	<input type="checkbox"/>	000	OBELCM_ROLE	<input type="button" value="Q"/>
<input type="checkbox"/>	Branch Code	Role Code	Role Description								
<input type="checkbox"/>	000	OBELCM_ROLE	<input type="button" value="Q"/>								
Page: 1 of 1 (1 of 1 items)   <input type="button" value=""/> < <input type="button" value="1"/> > <input type="button" value=""/>											

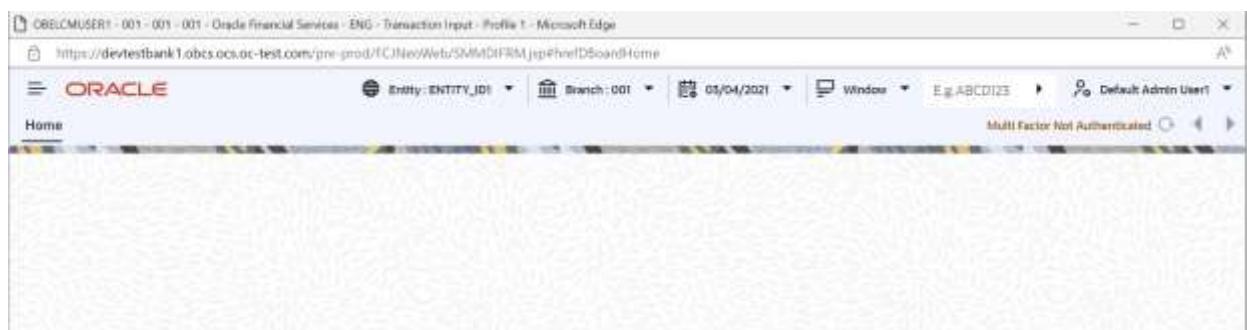
4. Save the user and authorize it with **OBELCMUSER2**.

### 1.3.2.2 Replicate Business Users in OBELCM

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

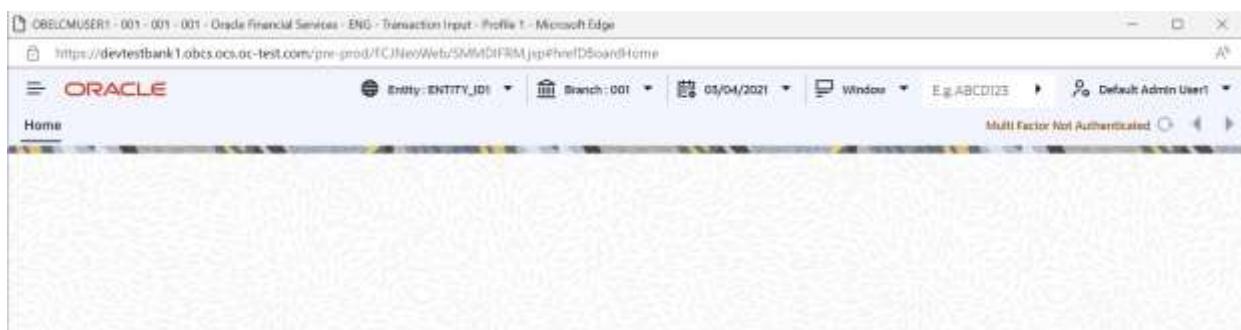


2. Click on Limits and Collaterals menu to launch OBELCM landing page.



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 OBECLM application must match.
6. The user ID for new business users in User Identification and LDAP DN field must match.