

Getting Started User Guide

Oracle Banking Enterprise Limits and Collateral Management Cloud Service

Release 14.7.5.0.0

Part No. G14683-01

September 2024

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 © 2023, 2024, 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.....	3
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

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

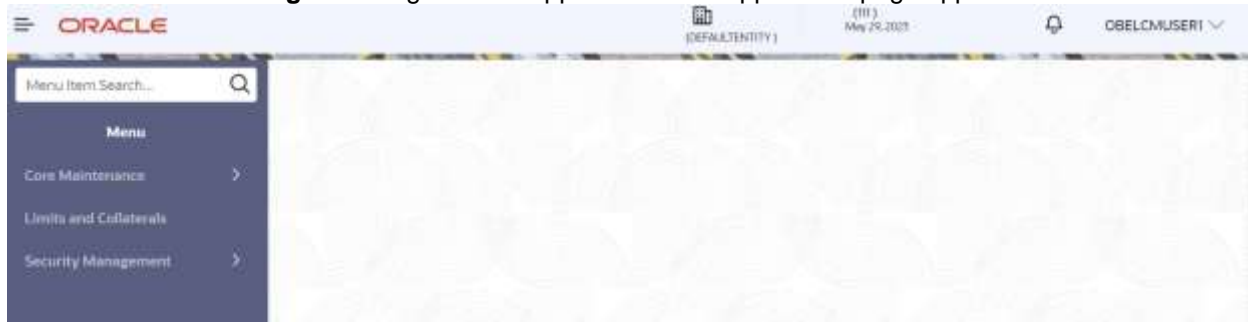
1. Specify the URL in the browser address and press **Enter**. The application Sign In page appears.



The screenshot shows the Oracle Cloud Account Sign In page. At the top, there is a green banner with the text "Level up your security" and "We are improving your security via a new multi-factor authentication policy. Learn more". Below the banner, the text "ORACLE Cloud" is displayed, followed by "devtestbankpint1" and "Oracle Cloud Account Sign In". There is a section for "Identity domain" with a dropdown menu showing "Default". Below this are two input fields: "User Name" with a placeholder "User name or email" and "Password" with a placeholder "Password". A link "Forgot Password?" is located below the password field. At the bottom, there is a "Sign In" button.

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.

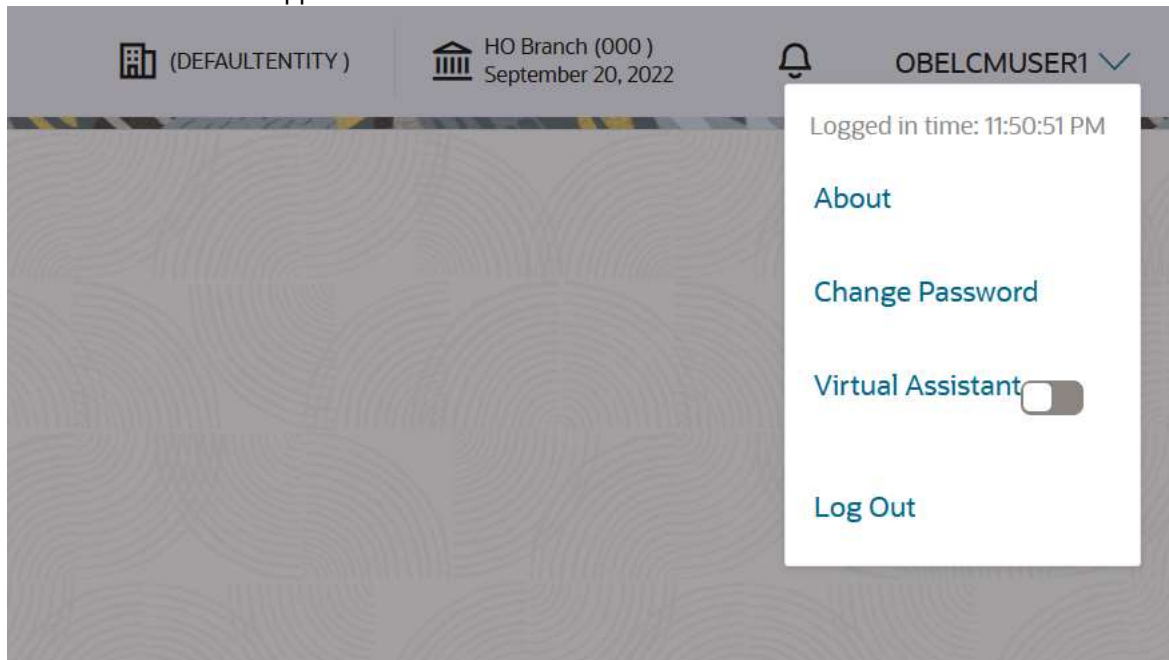


4. Click **Limits and Collaterals** to go to OBELCM main page.



1.1.2 Signing Out

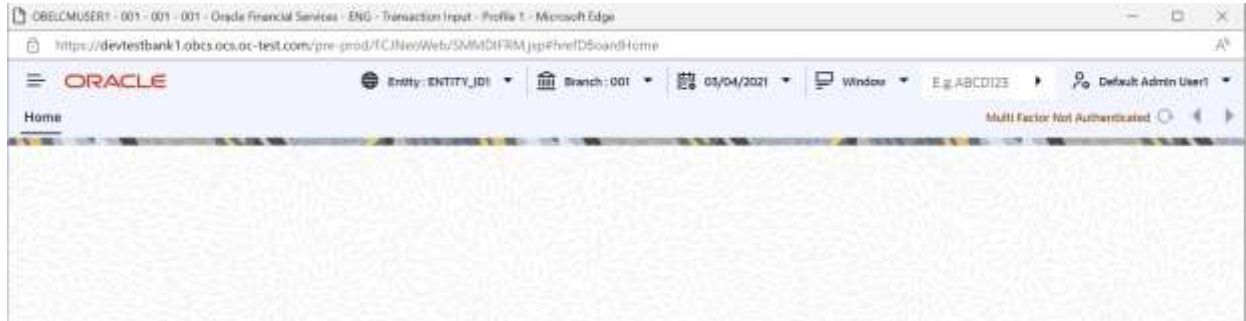
1. In the selected application, navigate to the Toolbar.
2. Under Toolbar, click the user name logged into the application. The User Profile fly-out menu appears.



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

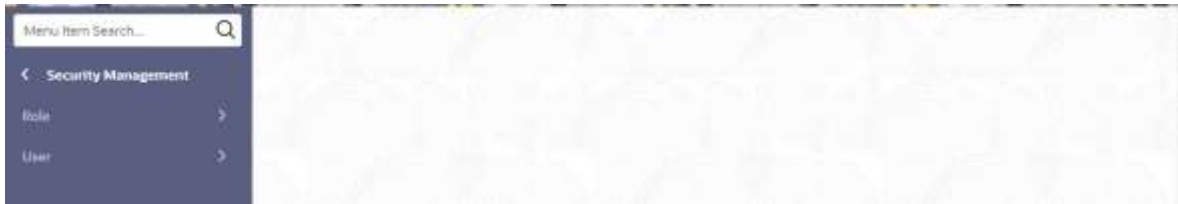
Entity ID	Home Entity	Entity Admin
DEFAI	<input type="checkbox"/>	<input type="checkbox"/>

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**.

Note

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

A screenshot of the 'Create Role' form. The form has a title 'Create Role' at the top left. Below the title, there are two input fields: 'Role Code' with the value 'OBELCM_ROLE' and 'Description' with the value 'Role for ELCM operations'. Below these fields, there is a table with two 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 of the form, there is a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and a '1' in a box.

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 (dropdown)
 - Status Changed On: (empty date field)
 - Is Supervisor: (disabled toggle)
 - Manager ID: (empty search field)
 - Start Date: May 29, 2023
 - End Date: (empty date field)
 - System User: (disabled toggle)

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 (dropdown)
 - Status Changed On: (empty date field)
 - Is Supervisor: (disabled toggle)
 - Manager ID: (empty search field)
 - Start Date: May 29, 2023
 - End Date: (empty date field)
 - System User: (disabled toggle)

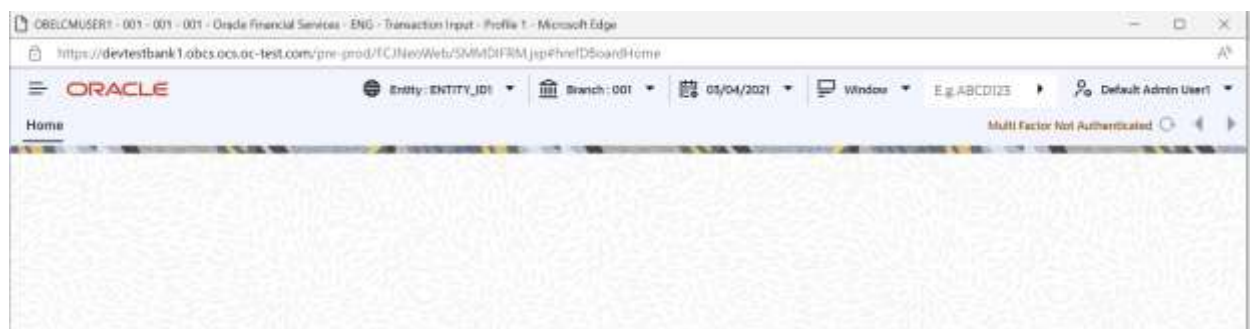
3. Map the business users **OBELCMUSER1** and **OBELCMUSER2** to the role created in Section 1.3.1.2, "Create Role", Step 2
4. Log Out from the App Shell application.

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 'User Role Branches' section of the 'Create User' form displays a table with the following columns: Branch Code, Role Code, and Role Description. The table contains one entry: Branch Code 000, Role Code OBELCM_ROLE, and Role Description. Below the table, there is a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and navigation controls.

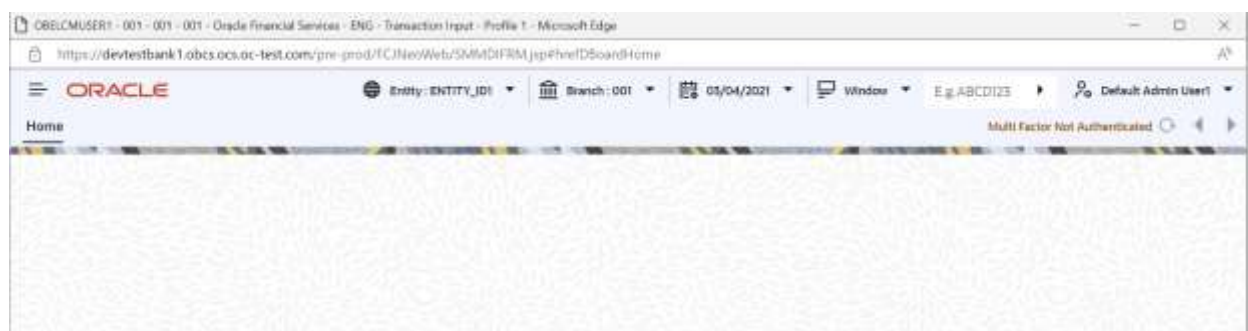
4. Save the user and authorize it with **OBELCMUSER2**.

1.3.2.2 Replicate Business Users in OBELCM

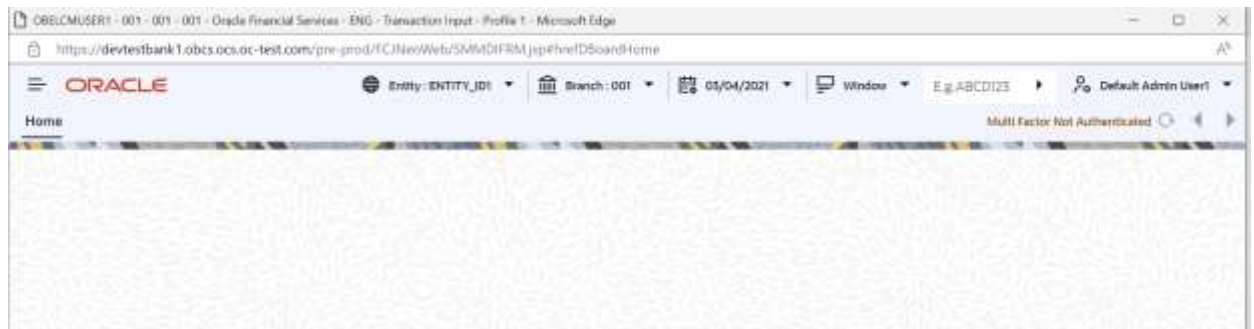
1. Sign-In to the App Shell application with Admin User **OBELCMUSER1**.



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.