

Getting Started User Guide

Oracle Banking Payments 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:

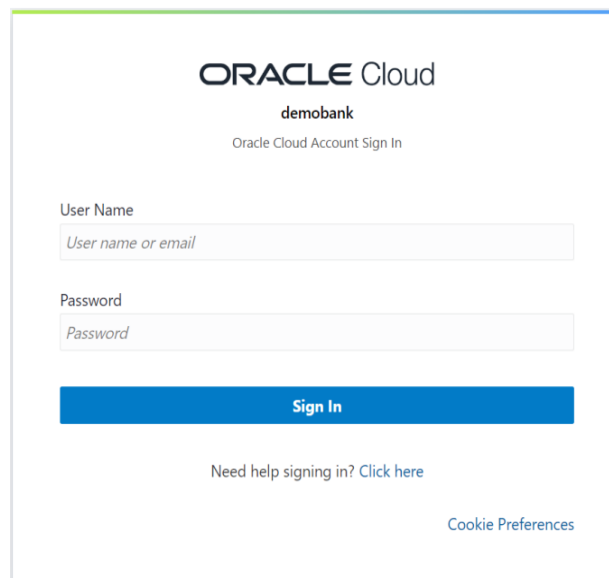
- [Section 1.1, "Accessing Application"](#)
- [Section 1.2, "Application Environment"](#)
- [Section 1.3, "How to's"](#)

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.

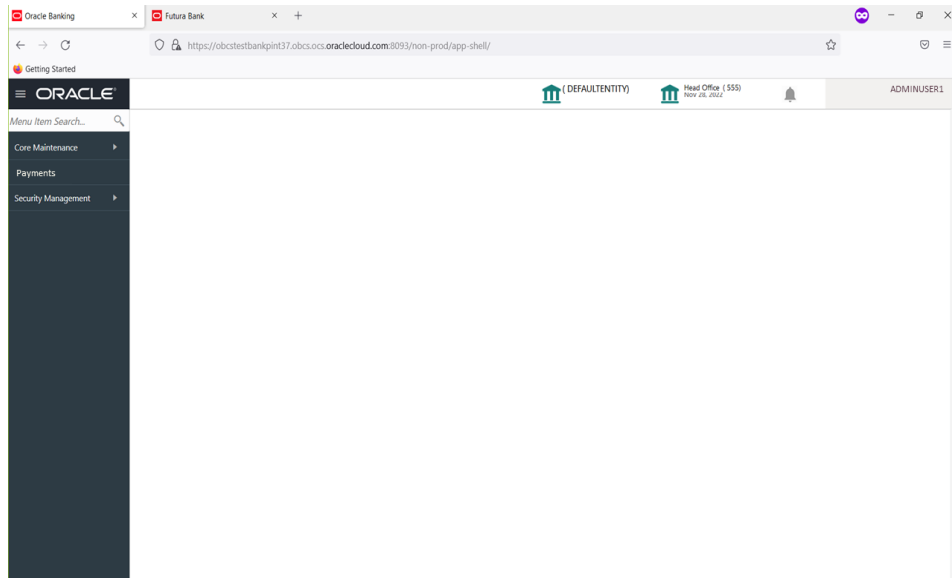


The screenshot shows the Oracle Cloud demobank Sign In page. At the top, it says "ORACLE Cloud" in a large font, followed by "demobank" in a smaller font, and "Oracle Cloud Account Sign In" in an even smaller font. Below this, there are two input fields: "User Name" with a placeholder "User name or email" and "Password" with a placeholder "Password". A blue "Sign In" button is positioned below the password field. At the bottom, there is a link "Need help signing in? Click here" and a link "Cookie Preferences" in the bottom right corner.

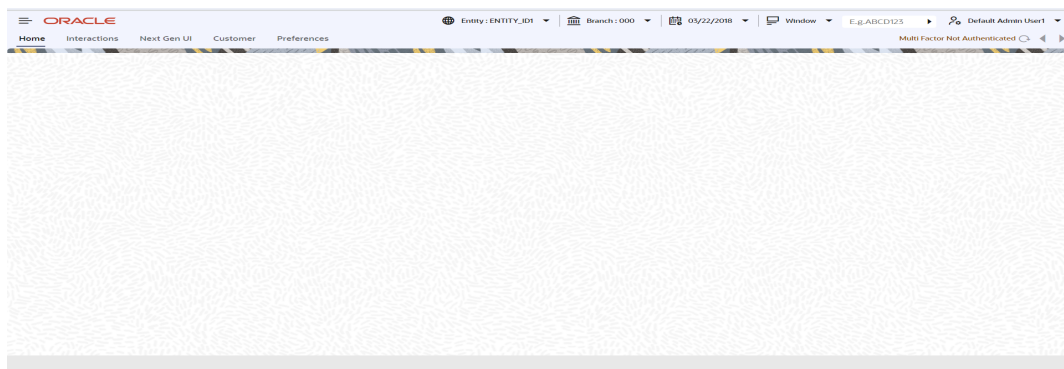
2. Provide the required information.

- **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.

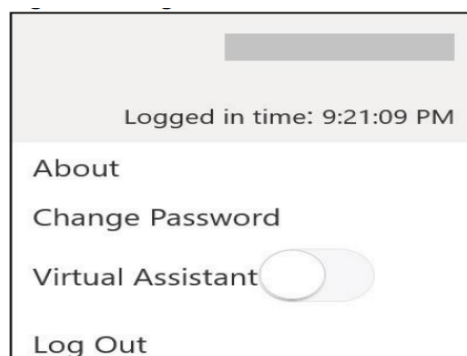


4. Click **Payments** to go to payments main page.



1.1.2 Signing Out

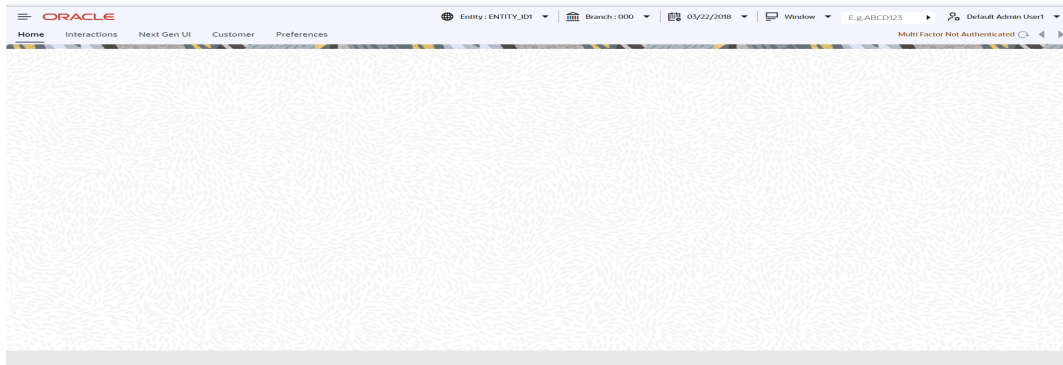
1. In the selected application navigate to the Toolbar.
2. Under Toolbar, click the user name logged into the application. The User Profile fly-out menu appears.



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 Payments page. This guide explains how to create different set of users and establish link between the App-shell and the Payments page:

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

1.3.1 Enable OBPM Menu in App-Shell

A Multi-Entity Admin user must take further actions following the successful provisioning of Oracle Banking Payment Cloud services to:

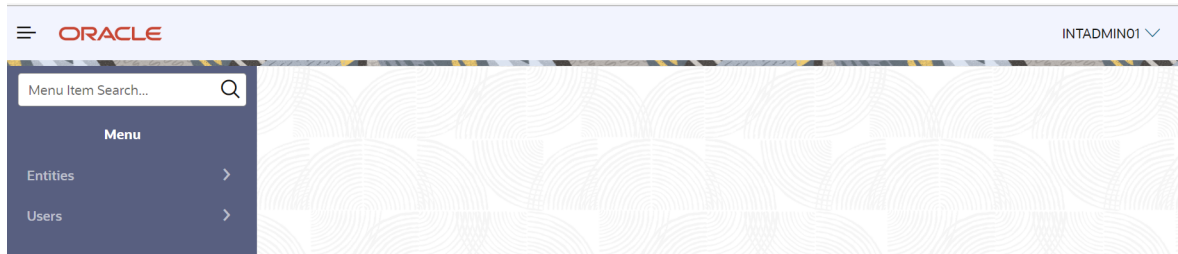
- Create new Entity Admin Users (if not already created as part of other cloud services setup).
- Entity Admin Users map OBPM functional activity codes to an existing role or a newly generated role.
- Entity Admin users create business users. The first two business users must be as mentioned in the detailed 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 Payments Menu Link"](#)

1.3.1.1 Create Entity Admin User

1. The subscriber for Oracle Banking Payments 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, **OBPMENTAD1** and **OBPMENTAD2**.

Create User

User Details

User ID OBPMENTAD1	User Name OBPMENTAD1	Locale en_US	Language Code ENG
Email ID obpmentad1@oracle.com	Start Date May 25, 2023	End Date May 15, 2024	

Entity Mapping

Entity ID	Home Entity	Entity Admin
DEFAI	☐	☐

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Create User

User Details

User ID OBPMENTAD2	User Name OBPMENTAD2	Locale en_US	Language Code ENG
Email ID obpmentad2@oracle.com	Start Date May 25, 2023	End Date May 15, 2024	

Entity Mapping

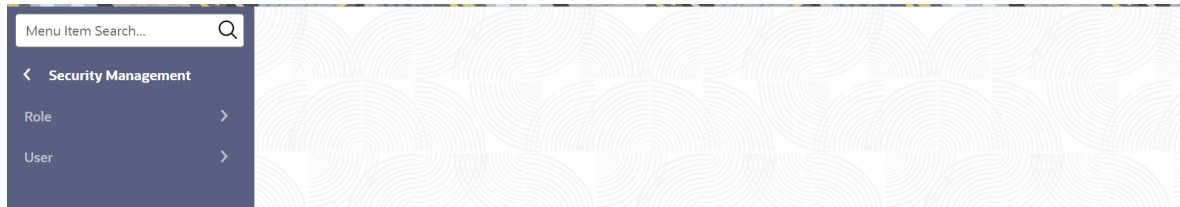
Entity ID	Home Entity	Entity Admin
DEFAI	☐	☐

Page 1 of 1 (1 of 1 items)

4. Log Out from the App Shell application.

1.3.1.2 Create Role

1. Sign In again to App Shell with entity admin users **OBPMENTAD1**, to create role.



2. Create the role **OBPM_ROLE** using entity admin user **OBPMENTAD1** and authorize it with entity admin user **OBPMENTAD2**.

Note

The above-mentioned role, **OBPM_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. It contains two input fields: 'Role Code' with the value 'OBPM_ROLE' and 'Description' with the value 'Role for OBPM Menu'. Below these fields is a table with two columns: 'Functional Activity Code' and 'Functional Activity Description'. The table has one row with the values 'OBPM_MENU_FA_DASHBOARD' and 'OBPM Dashboard'. At the bottom of the form, there is a pagination bar showing 'Page 1 of 1 (1 of 1 items)' and a search bar labeled 'Search By Functional Activity Code'.

3. Map functional activity code **OBPM_MENU_FA_DASHBOARD** corresponding to OBPM menu to the role **OBPM_ROLE**.

1.3.1.3 Create Business User

1. OBPM provisions two factory-shipped user IDs:
 - OBPMUSER1 (factory-shipped user 1)
 - OBPMUSER2 (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 Payment Application. These business users are the Payment Admin Users.

2. Create business users **OBPMUSER1** and **OBPMUSER2** using entity admin user **OBPMENTAD1** and authorize it with entity admin user **OBPMENTAD2**.

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

- User Details:**
 - Name: OBPMUSER1
 - Login ID: OBPMUSER1
 - Home Branch: 001
- Status:**
 - User Status: Enable (dropdown)
 - Status Changed On: (empty date field)
 - Is Supervisor: (disabled toggle)
 - Manager ID: (empty search field)
 - Start Date: January 25, 2022
 - End Date: (empty date field)
 - System User: (disabled toggle)

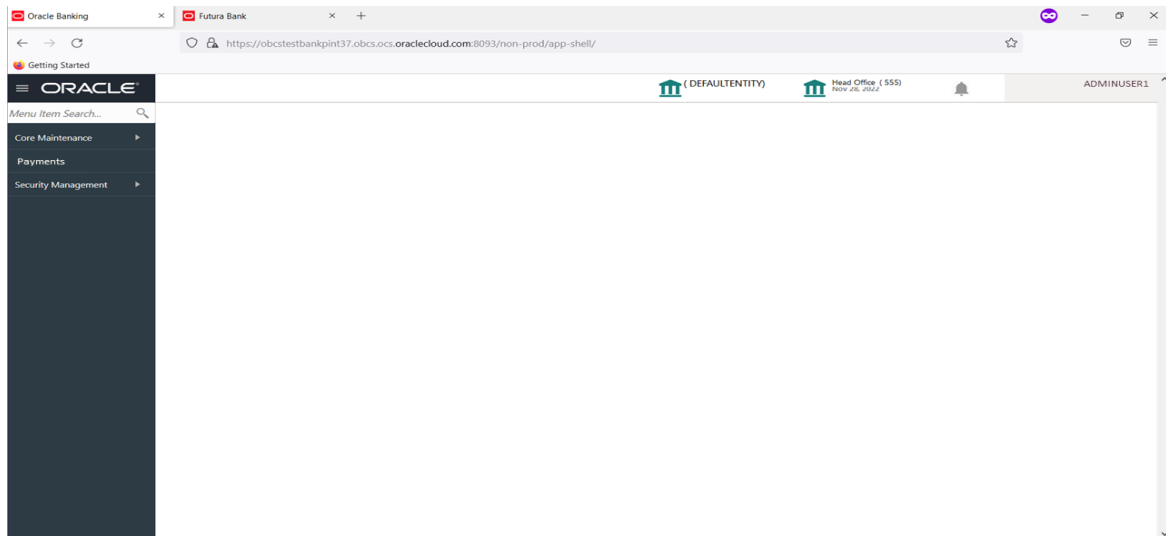
The screenshot shows the 'Create User' form with the following fields and values:

- User Details:**
 - Name: OBPMUSER2
 - Login ID: OBPMUSER2 (with a note: 'Enter 6 to 12 characters')
 - Home Branch: 001
- Status:**
 - User Status: Enable (dropdown)
 - Status Changed On: (empty date field)
 - Is Supervisor: (disabled toggle)
 - Manager ID: (empty search field)
 - Start Date: January 25, 2022
 - End Date: (empty date field)
 - System User: (disabled toggle)

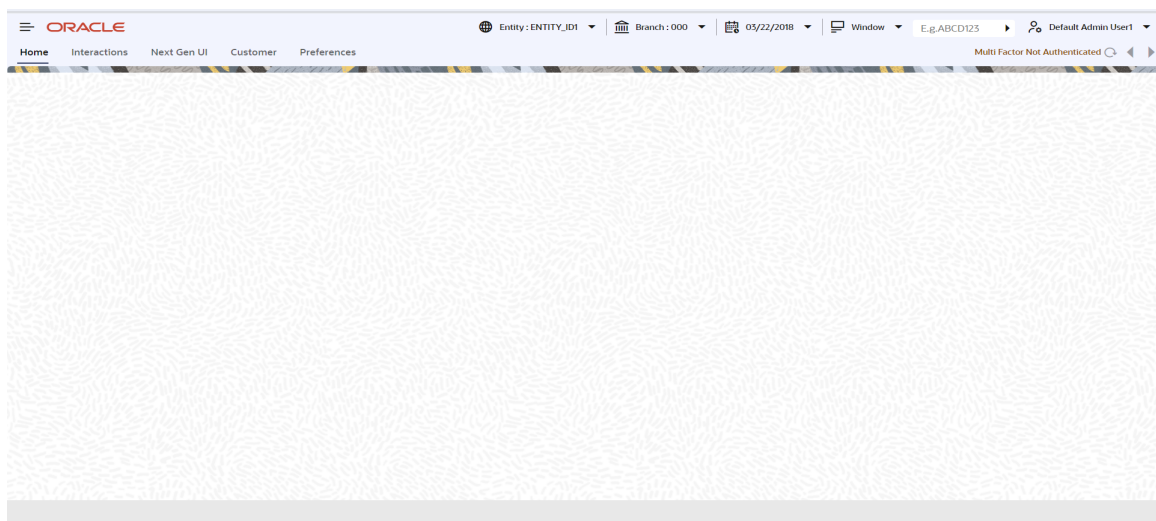
3. Map the business users **OBPMUSER1** and **OBPMUSER2** to the role created in [Section 1.3.1.2, "Create Role", Step 2](#)
4. Log Out from the App Shell application.

1.3.1.4 Verify Payments Menu Link

1. Sign In to the App Shell application with business users **OBPMUSER1** and **OBPMUSER2** to see the Payments in the menu.



2. Click on Payments menu to launch payments landing page.



1.3.2 Create new business users for Payments

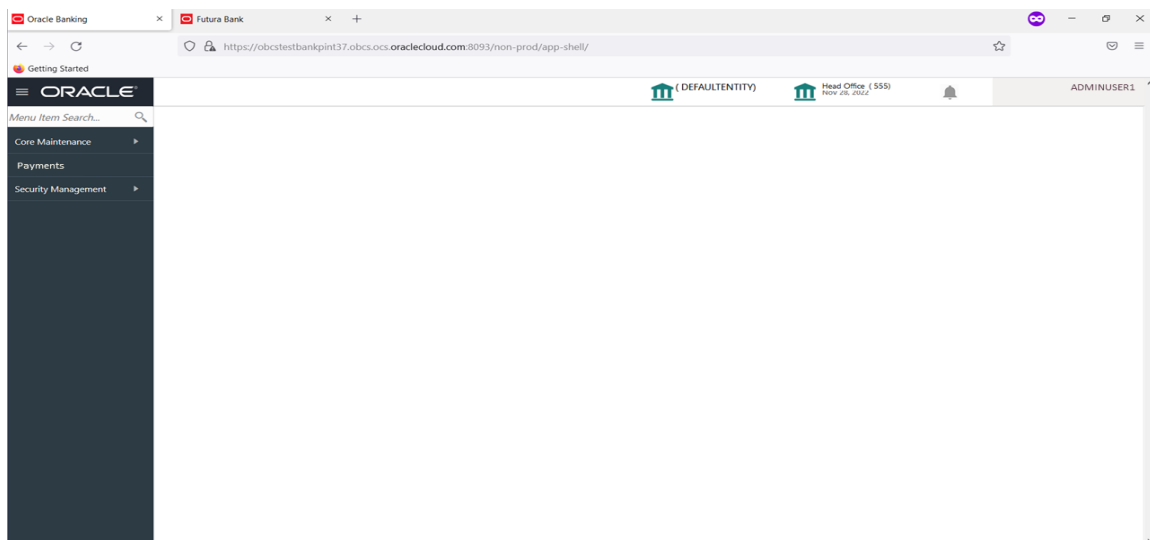
An Entity Admin user can create additional business users as needed after creating a role and mapping the factory-shipped business users. For these business users, the user ID can be chosen appropriately. The same user IDs must be replicated in the payment application once they have been created in App-Shell. The payment admin users created in [Section 1.3.1.3, "Create Business User", Step 3](#) can do this replication in the payment application.

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 Payments"](#)

1.3.2.1 Create new Business Users in App Shell

1. Sign-In to App Shell with Payment Admin user OBPMUSER1.



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

User Details

Name: OBPMBU1 Login ID: OBPMBU1 Home Branch: 001

Status

User Status: Enable Status Changed On: Is Supervisor: Manager ID: Start Date: January 25, 2022 End Date: System User:

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

User Role Branches

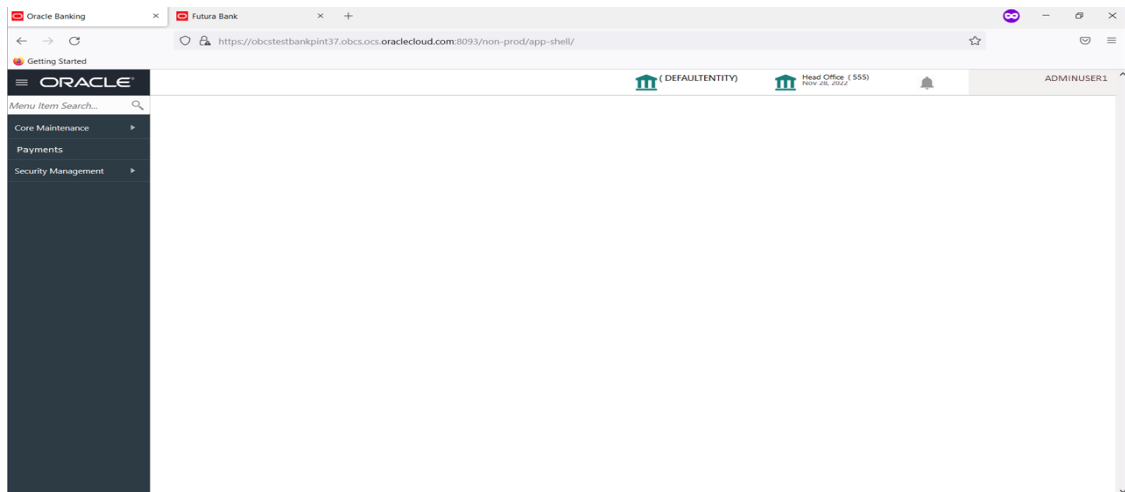
	Branch Code	Role Code	Role Description
☐	001	OBPM_ROLE	Role for OBPM Menu

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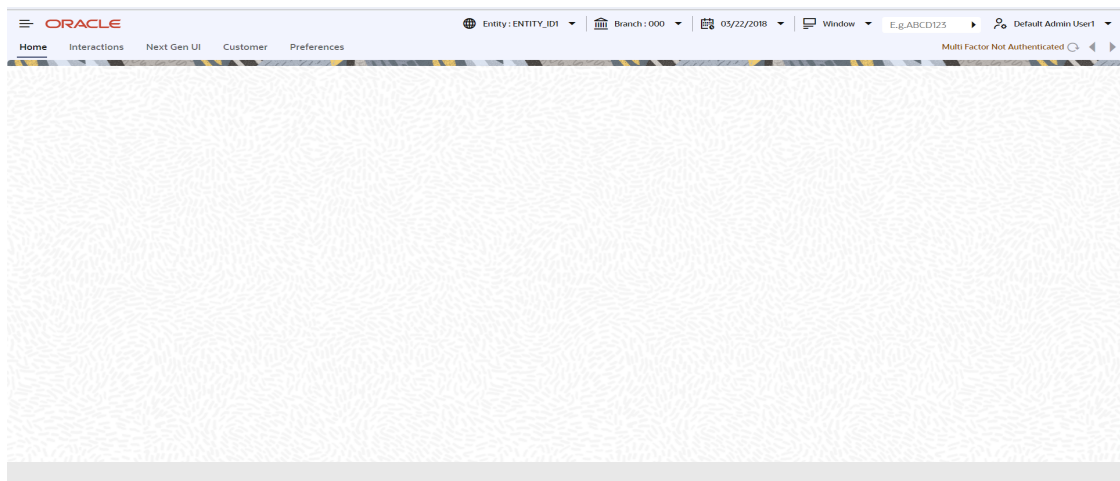
4. Save the user and authorize it with **OBPMUSER2**.

1.3.2.2 Replicate Business Users in Payments

1. Sign-In to the App Shell application with Payments Admin Users **OBPMUSER1**.

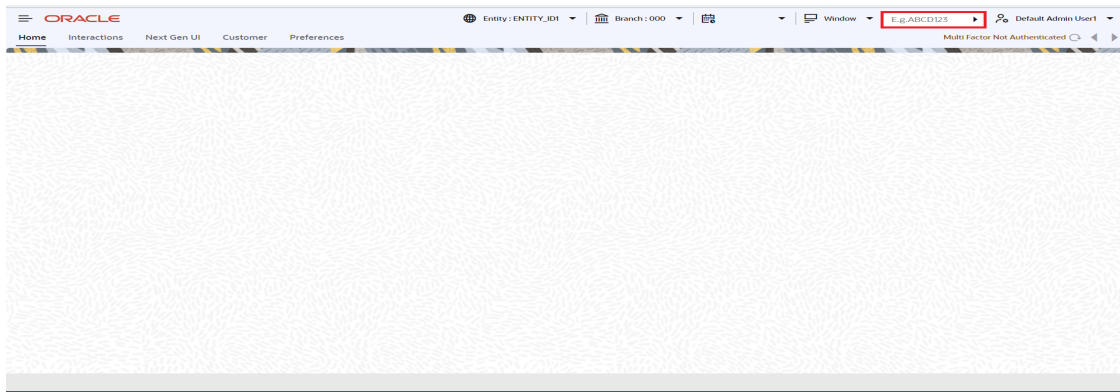


2. Click on Payments menu to launch payments landing page.



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