

Document Management System Interface User Guide

**Oracle Banking Retail and SME
Lending Cloud Service**

Release 14.8.2.0.0

Part No. G55841-01

April 2026

Document Management System Interface User Guide
Oracle Banking Retail and SME Lending Cloud Services

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1. Preface

1.1 Introduction

This manual is designed to help acquaint you with the integration of Oracle Banking Retail and SME Lending Cloud Service Document Management System Interface.

1.2 Audience

This manual is intended for the following User/User Roles:

| Role | Function |
|-----------------------------------|----------------------------------|
| Back office data entry Clerks | Input functions for maintenances |
| Back office Managers/ Officers | Authorization functions |

1.3 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

1.4 Critical Patches

Oracle advises customers to get all their security and vulnerability information from the Oracle Critical Patch Update Advisory, which is available at [Critical Patches, Security Alerts and Bulletins](#). All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

1.5 Organization

This manual is organized as follows:

| Chapter | Description |
|-----------|--|
| Chapter 1 | <i>About this Manual</i> gives information on the intended audience. It also lists the various chapters covered in this User Manual. |
| Chapter 2 | <i>Oracle Banking Retail and SME Lending Cloud Service - DMS Integration</i> explains about Oracle IPM which is an external Document Management System with which Oracle Banking Retail and SME Lending Cloud Service integrates for document processes. |

1.6 Acronyms and Abbreviations





| Abbreviation | Description |
|--------------|--------------------------------|
| DMS | Document Management System |
| IPM | Imaging and Process Management |

1.7 Organization

This document talks about the required maintenance and further processing of data transfer between Oracle Banking Retail and SME Lending Cloud Service and DMS.

1.8 Glossary of Icons

This User Manual may refer to all or some of the following icons.

| Icons | Function |
|---|-------------|
|  | Exit |
|  | Add row |
|  | Delete row |
|  | Option List |

1.9 Related Documents

You can refer to the following documents:

- Procedures User Manual

2. Oracle Banking Retail and SME Lending Cloud Service - DMS Integration

Oracle IPM is an external Document Management System with which Oracle Banking Retail and SME Lending Cloud Service integrates for document processes. Oracle IPM provides image scanning and business process management capabilities for enterprise applications. Oracle IPM is integrated with Oracle Banking Retail and SME Lending Cloud Service to support the existing Oracle Banking Retail and SME Lending Cloud Service DMS.

The integration between Oracle Banking Retail and SME Lending Cloud Service and Document Management Systems occurs only in process flows. Therefore, not all modules of Oracle Banking Retail and SME Lending Cloud Service are utilizing the services offered by the integration. The user interface in Oracle Banking Retail and SME Lending Cloud Service makes standard request to the underlying infrastructure and Oracle Banking Retail and SME Lending Cloud Service infrastructure would interact with the DMS and supply the result to user interface in same manner.

This chapter includes the following section:

- [Section 2.1, "Oracle Banking Retail and SME Lending Cloud Service and external DMS"](#)

2.1 Oracle Banking Retail and SME Lending Cloud Service and external DMS

This section contains the following topics:

- [Section 2.1.1, "Integrating Oracle Banking Retail and SME Lending Cloud Service with external DMS"](#)
- [Section 2.1.2, "Adding a Document to DMS"](#)
- [Section 2.1.3, "Viewing the Document Indexed in the DMS"](#)
- [Section 2.1.4, "Deleting a Document Indexed in DMS"](#)

2.1.1 Integrating Oracle Banking Retail and SME Lending Cloud Service with external DMS

You can integrate Oracle Banking Retail and SME Lending Cloud Service with Oracle IPM. Oracle Banking Retail and SME Lending Cloud Service will integrate/interact with one DMS provider at a given time and currently it is integrated with Oracle IPM only. Adapters are kind of service provider which provides the operations as per the Oracle Banking Retail and SME Lending Cloud Service infrastructure.

Oracle Banking Retail and SME Lending Cloud Service supports a set of operations that are common to the DMS solutions supported. The set of operations that would be supported by the integration are:

- Add a document to a DMS
- View a document indexed in the DMS
- Delete a document indexed in the DMS

2.1.2 Adding a Document to DMS

In this operation you can upload a document to a DMS. The paper documents should be scanned into a digital format, which can be uploaded to the DMS. To upload the digital document, you must choose the file using the browse dialog and click upload button to index

the document in the DMS. The DMS would register the document and provide a document ID to identify this document for later usage. This document ID can be used to locate the document, for other operations.

Oracle Banking Retail and SME Lending Cloud Service stores this document ID to maintain a linkage between the documents stored in the DMS, and the documents pertaining to any transaction. Hence, the documents indexed in the DMS by Oracle Banking Retail and SME Lending Cloud Service, can be opened and viewed at a later stage.

If Oracle IPM is the DMS of choice, then the document ID is stored as an attribute of the document.

The ID can be utilized for searching and locating the document via the search features offered by Oracle IPM.

Bills and Collection Contract Detailed

Save Hold

> Additional Details

< Parties Assignee Details **Documents** Goods Exception Discrepancies Rollover Drafts Insurance Invoice Packing Credit Financing Multi

Document Details

| <input type="checkbox"/> | Code | Description | First Mail Copy | Second Mail Copy | First Mail Original | Second Mail Original | Reimbursement Bank Copy | Document Reference |
|--------------------------|------|-------------|-----------------|------------------|---------------------|----------------------|-------------------------|--------------------|
| No data to display. | | | | | | | | |

Page 1 (0 of 0 items) |< < 1 > >|

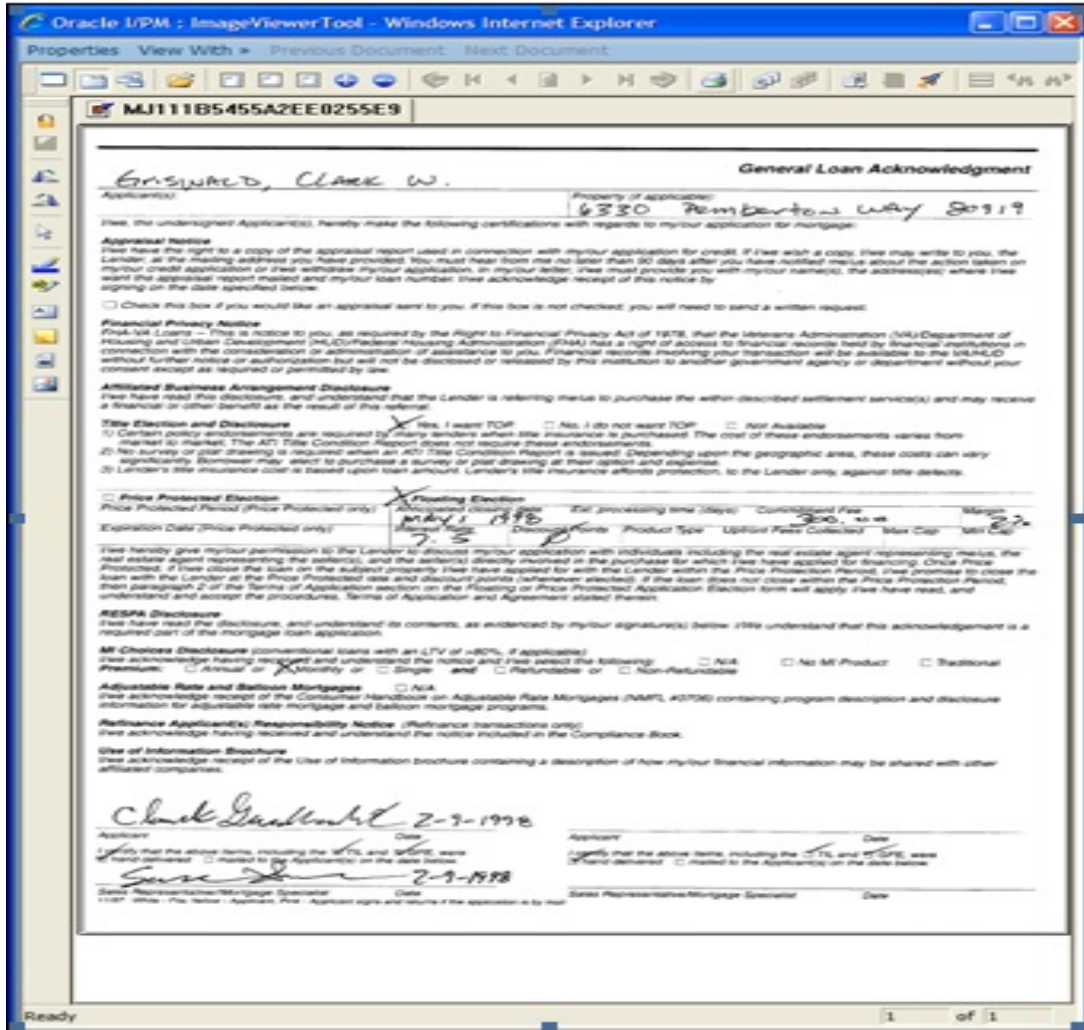
Clause

Events Advices/FFT Settlement Split Settlement Collateral Interest Charges Tax Import License MIS Loan Preference Dra Audit Cancel

2.1.3 Viewing the Document Indexed in the DMS

Oracle Banking Retail and SME Lending Cloud Service allows you to view documents stored in a DMS that are referenced by transactions created in Oracle Banking Retail and SME Lending Cloud Service. To view the document captured in DMS, select the document and click View button.

If Oracle IPM is your DMS, you must login to Oracle IPM and you can view the document in the 'Oracle IPM: ImageViewerTool' screen.



Documents stored in Oracle IPM are viewed via the Oracle IPM Viewer which provides additional functionality to annotate the document.

Note

If Oracle IPM Viewer is not installed on your machine you can use the plain Image Viewer to view the documents.

2.1.4 Deleting a Document Indexed in DMS

Documents stored in the DMS can be deleted from Oracle Banking Retail and SME Lending Cloud Service if the transaction stores the link to the document. To delete the document captured in the DMS, select the document and click 'Delete' button to delete the record from the set of document records.

After the deletion of a document the corresponding Oracle Banking Retail and SME Lending Cloud Service transaction would not have references to the document. If the document does not get deleted from the DMS, the record would still be removed from the Oracle Banking Retail and SME Lending Cloud Service transaction, so that a failure in the DMS would not prevent further transactions.

To delete multiple documents at a time, you have to select the multiple records corresponding to the document and click the delete button. The system displays the message as "The selected documents have been deleted from the Document Manager System."