Oracle Digital Assistant Integration Guide
Oracle FLEXCUBE Universal Banking
Release 14.8.3.0.0
Part No. G61377-01
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ORACLE
FINANCIAL SERVICES

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1. Introduction

Oracle Digital Assistant is provided by Oracle as a cloud based product.

FLEXCUBE UBS connects to the chat server via URI and channel id. URI is the Chat Server URL and channel id is Web Channel Id through which communication happens.

FLEXCUBE UBS makes use of web-sdk provided by Oracle to connect to the chatbot server. The web-sdk JavaScript files are not bundled with FLEXCUBE UBS, as there will be a separate release for the same. These files need to be downloaded separately and the necessary changes made.

The parameter chatbot to denote enable/disable is added in fcubs.properties file.

A small popup screen is available as a chatbot where users can type his/her query related to FLEXCUBS UBS. The chatbot replies on the same window to the user. Chatbot can also launch the screen based on the user confirmation.

In ‘Oracle Digital Assistant’, chatbots for different purposes are created as ‘Skills’. Once a chatbot (skill) is created, ‘Channels’ need to be created in ODA to expose the chatbot to the external environment. A specific channel of type “Oracle Web” shall be created dedicatedly for FLEXCUBE. Various parameters, as detailed in the sections below, shall be configured while creating a channel. It includes channel identifier, channel type, allowed domains, secret key (auto-generated) and channel ID. Client authentication and session expiration shall also be set here. The parameters for FCUBS are set as mentioned in the screenshot. The secret key and the channel ID help the client pick the right channel and interact with desired chatbot.

2. Prerequisites

This document assumes that the FLEXCUBE UBS-related software is present and configured properly.

- Web-sdk related javascript files related to Oracle Development Assistant (ODA) are downloaded (https://www.oracle.com/downloads/cloud/amce-downloads.html)
- Using ODA instance, required SKILL(chatbot) is created, and the chat server URL and channel IDs are created accordingly.

3. Scope

A small pop-up screen acts as a chatbot in the landing page, allowing users to access information about business products for CORE, CASA, and CL modules. It provides Account Operations, Customer Operations, and User manual search over the WEB using Generative AI. The chatbot responds in the same window according to the options chosen by the user.

4. Integration

- Chatbot needs to be enabled while creating property file for FLEXCUBE UBS Application. Please refer property file creation document for the same.
- Download Web-sdk related JavaScript files related to Oracle Development Assistant (ODA) from https://www.oracle.com/downloads/cloud/amce-downloads.html
- Below listed modifications are required once the web-sdk related JavaScript files are downloaded.
    a) URI and channel Id need to be updated in settings.js. Please find the snippet below.

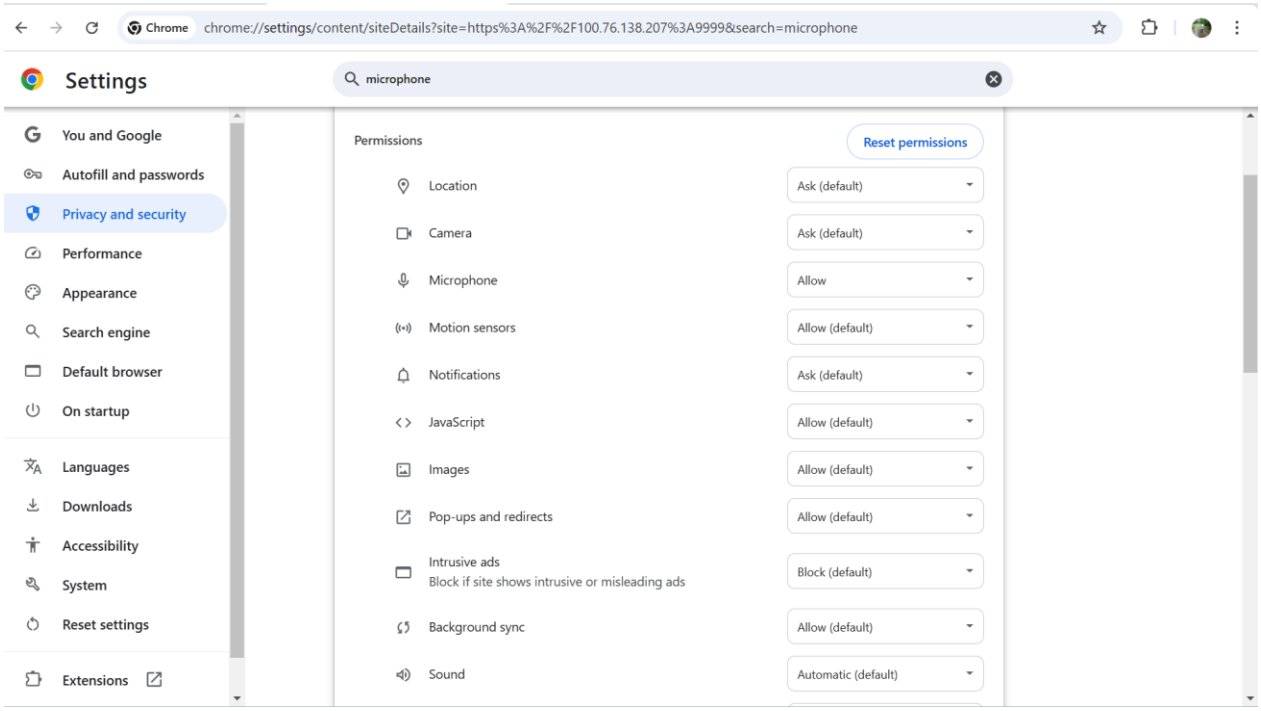
```
chatWidgetSettings = {
URI: <ODA URI>,
channelId:<ODA Channel ID>,
enableSecureConnection: true,
enableSpeech: true,
enableBotAudioResponse: true
};
```

    b) Modify the fonts and CSS in settings.js as required. Please refer to the sample JS under the JS folder.

    After modification, place the settings.js and web-sdk.js files inside the FLEXCUBE OSDC folder location in the below path - INFRA\FCJNeoWeb\Web-Content\script\JS

5. Microphone Access to the application

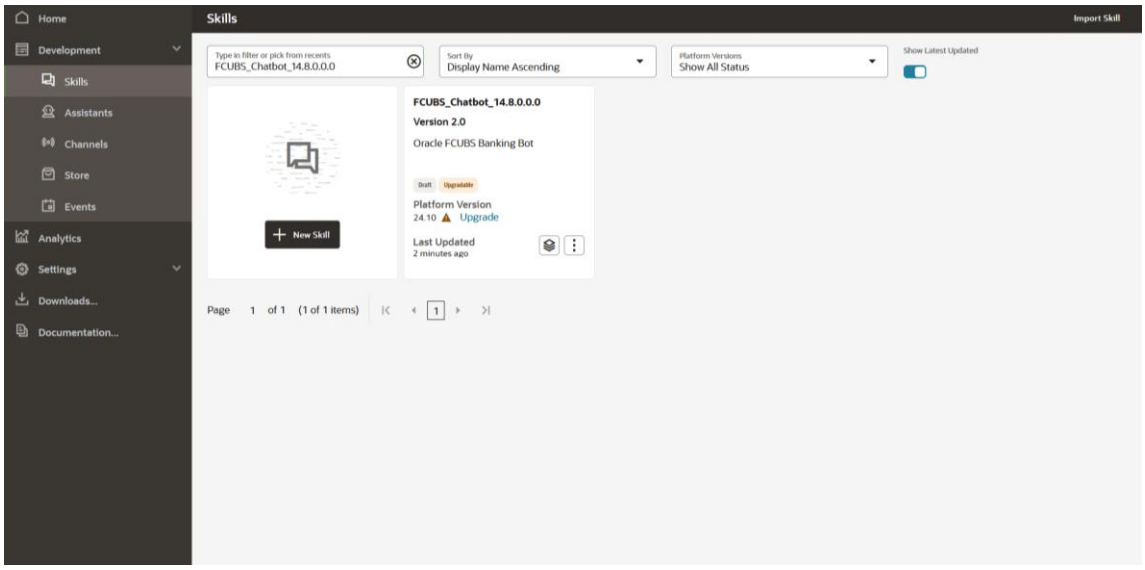
After deployment, when trying to access the FLEXCUBE UBS URL, Microphone access shall be given in the browser level for the application URL, or the same will be prompted on clicking the microphone in the chat window. Select Allow to give access to the microphone.



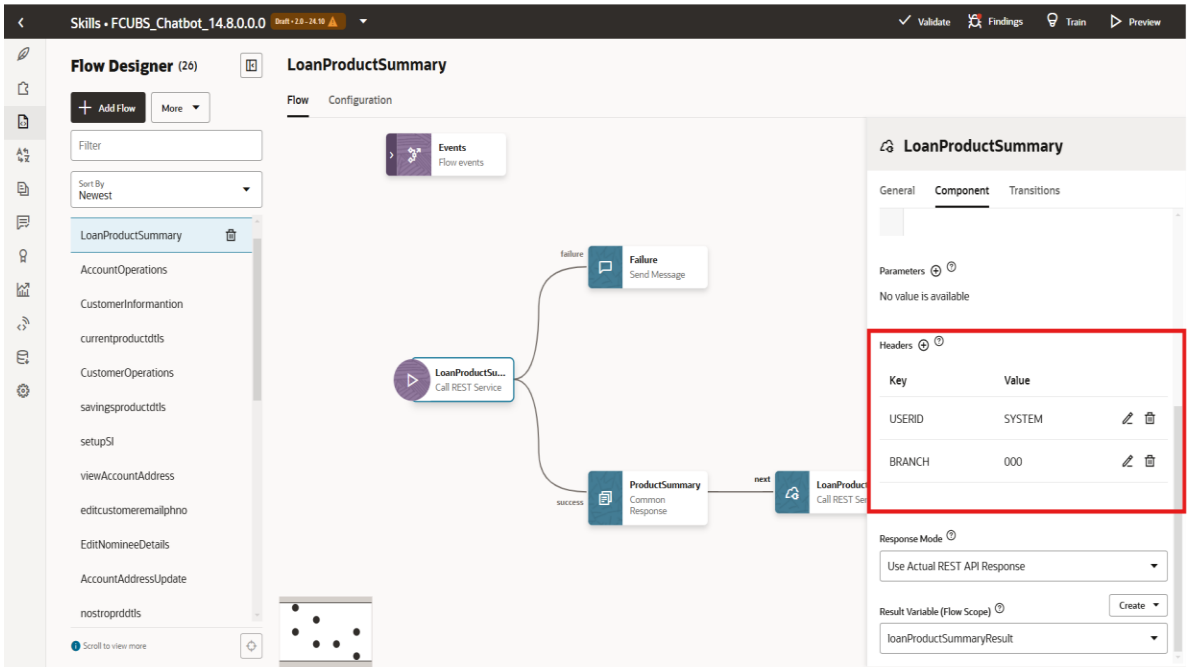
6. Import skills to ODA server

To import the chatbot into Oracle Digital Assistant (ODA), follow the steps below.

- In ODA, under the development pane to the left, select “**Skills**” and click on the “**Import Skill**” button, which appears in the right-top corner of the screen.
- A new window pops up from where the FCUBS_Chatbot_14.8.0.0.0.zip file needs to be selected to import. Once the zip file is imported successfully, the chatbot shall be available in the skills list.
- Then, a channel needs to be created as mentioned in the next section, and the imported skill needs to be mapped to that channel.



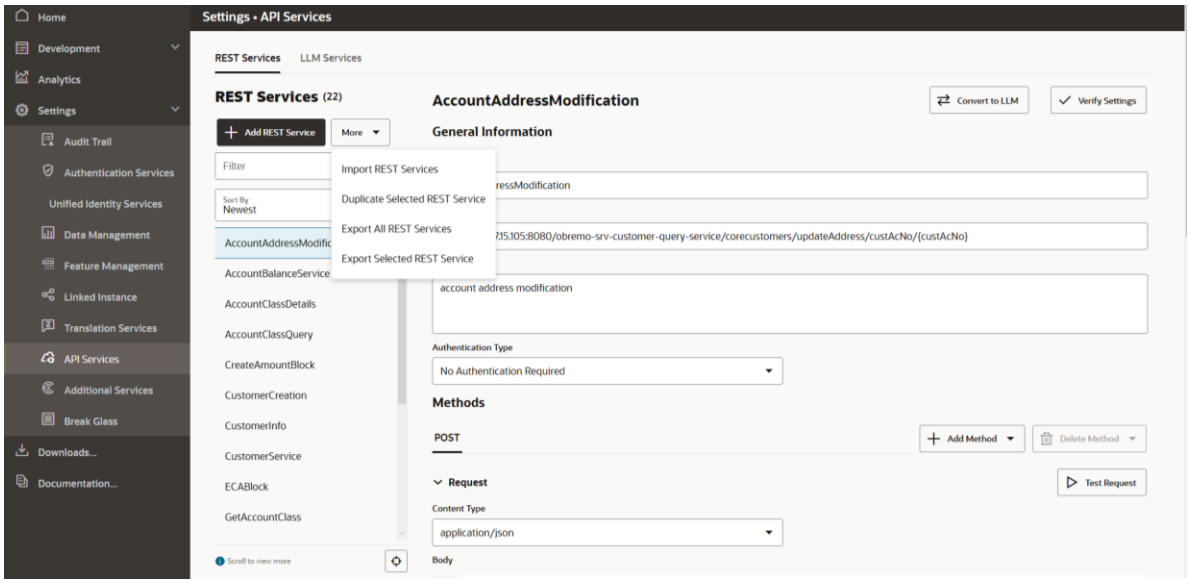
- Once the skill is imported, navigate to the Flow designer. When a user calls REST Services, their Header can include the customer-specific values based on REST service header fields, or Skill will pick the USER ID and BRANCH CODE from the login user and the user's current branch, which are already included in the HEADER for each REST service maintenance.



Import REST and LLM Services:

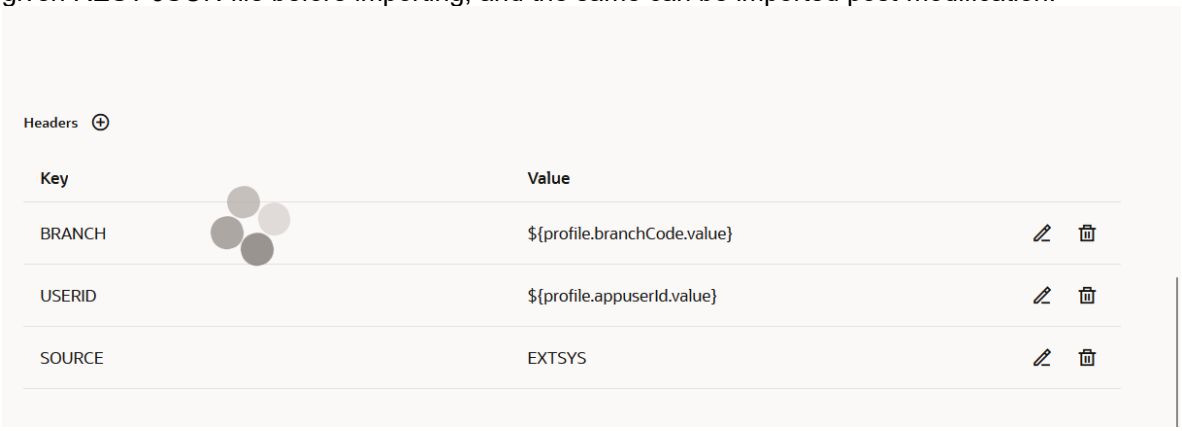
A file for importing Pre-defined REST services will be shared. Modify IP and PORT as needed, and follow the import as below.

- Set the **GW_LOGUSER_CHECK** parameter to "**N**" in the **CSTB_PARAM** table of the FCUBS Database. This will not be validated during the REST service call by the ODA Chatbot. Alternatively, if a different user is involved, they must be updated in REST JSON before importing.

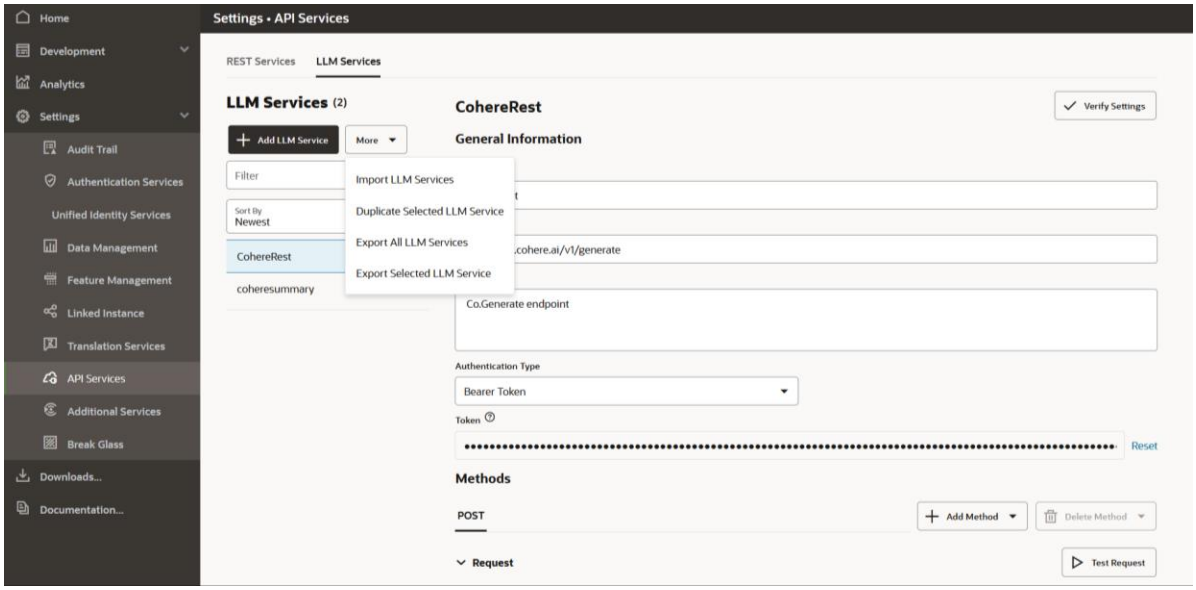


- Headers are already predefined while setting up the REST methods, as shown in the screenshot below. The branch code and user ID will be picked from the login user ID and the User's current branch. SOURCE is defaulted to EXTSYS.

- If the user wants to maintain a new External Source for ODA, the same can be modified in the given REST JSON file before importing, and the same can be imported post-modification.

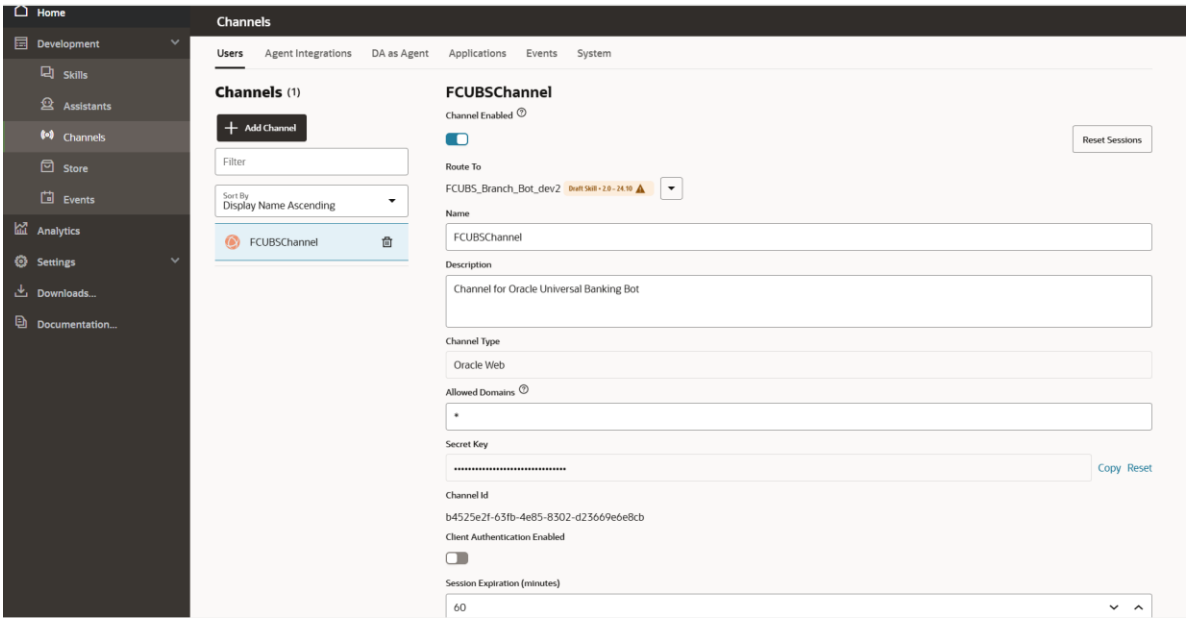


Pre-defined LLM services import file will be shared, modify the URI and token accordingly and do the import as below.



Channel Creation

'Channels' need to be created at the ODA side to expose the chatbots to the external environment. Click on '+Channel' button in the 'channels' section to create a new channel. Channel of type "Oracle Web" has to be created for FLEXCUBE. Preferred channel name should be mentioned, followed by the various parameters as detailed in the diagram below can be configured while creating a channel. It includes channel identifier, channel type (Mandatorily "Oracle Web"), allowed domains, secret key (auto-generated), and channel ID (auto-generated). Client authentication and session expiration can also be set here. In "Route To" field, the skill (chatbot) which had got imported as zip file needs to be mapped. The secret key and the channel ID helps the client pick the right channel and interact with desired chatbot. Once a channel is created, chatbot Url and the channel id which gets generated should be configured in the web-sdk client.

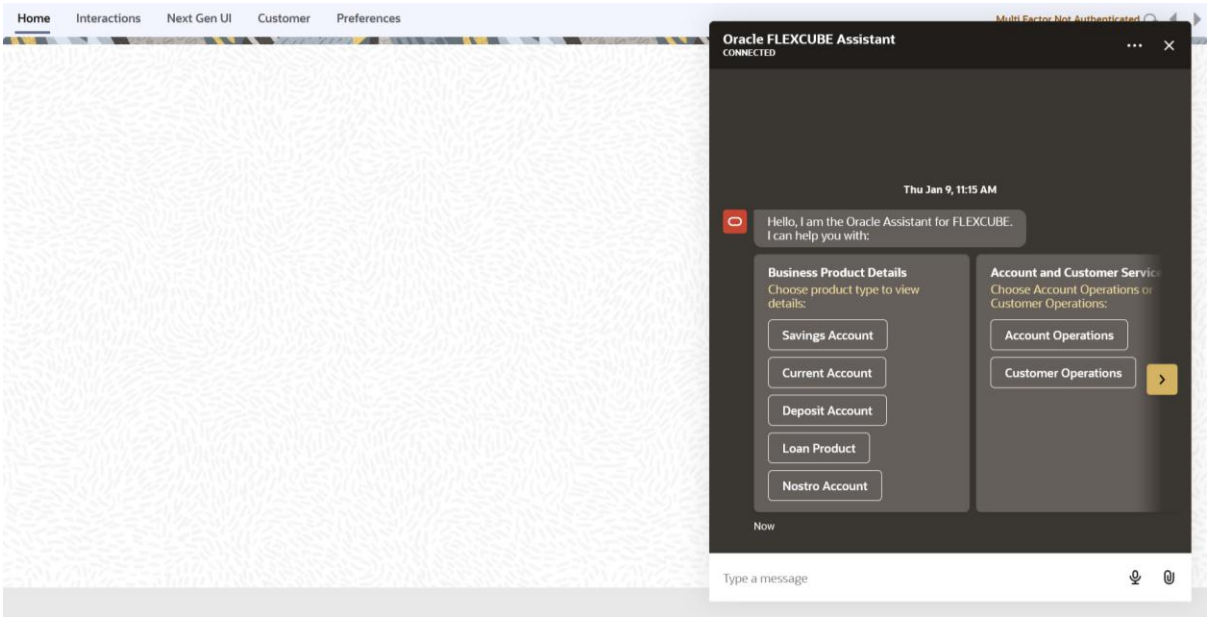

Home
Development
Skills
Assistants
Channels
Store
Events
Analytics
Settings
Downloads...
Documentation...
Channels
Users
Agent Integrations
DA as Agent
Applications
Events
System
Channels (1)
Add Channel
Filter
Sort By
Display Name Ascending
FCUBSChannel
FCUBSChannel
Channel Enabled
Reset Sessions
Route To
FCUBS_Branch_Bot_dev2
Name
FCUBSChannel
Description
Channel for Oracle Universal Banking Bot
Channel Type
Oracle Web
Allowed Domains
*
Secret Key
Copy
Reset
Channel Id
b4525e2f-63fb-4e85-8302-d23669e6e8cb
Client Authentication Enabled
Session Expiration (minutes)
60

7. Invoke ChatBot

1. Once logged in to the application, there will be a chat bubble at the bottom right corner of the application window.



2. On clicking the bubble, the chat window appears with pre-defined menu.



3. Currently Supported Operations are:
    - Business Product Details
        1. Saving Account
        2. Current Account

3. Deposit Account
4. Loan Product
5. Nostro Account

- Account and Customer Service

1. Account Operations
    1.1. Account Information
        1.1.1. Account Balance
        1.1.2. Customer Account Details
        1.1.3. Account Address
        1.1.4. Latest Transactions
    1.2. Account Address Update
    1.3. Account Status Change
    1.4. Amount Block
    1.5. Activate Dormant Account
    1.6. Setup Standing Instruction
2. Customer Operations
    a) Customer Information
    b) Update Email and Phone number

- User Manual Web Search

1. Search

8. Supported Predefined Services and Operations

Below are the supported services and operations, including the REST service and LLM setup information, and respective Chat Bot option for user reference.

List of Services to be deployed as part of FCUBS:

- obremo-srv-customer-query-service
- fcubs-customer-acc-service
- CLProdDetailsService
- AccountBalanceService
- CustomerAccountService
- CustomerAccountAmountBlockService
- StandingInstructionService
- CustomerService

8.1 Get Product Details

Based on the product type, the product list will be retrieved, and when a specific product is selected from the list, details will be shown.

8.1.1 View Product list based on the type (Savings, Current, Nostro, and Term Deposits)

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query service/corecustomers/getAccountClass/accountClassType/{accountClassType}"

Name: "GetAccountClass"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: accountClassType

Headers: userId
branchCode

8.1.2 Get product details on click of the product (Savings, Current, Nostro and Term Deposits)

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/getAccountClassInfoDetials/accountClass/{accountClass}"

Name: "AccountClassDetails"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: accountClass

Headers: userId
branchCode

8.1.3 View Loan Product list

Endpoint: http://<IP>:<PORT>/CLProdDetailsService/CLProdDetails/SummaryQueryProdDetails

Name: "LoanProductSummary"

Type: "REST"

Rest Service Method Type: "GET"

Headers: USERID
BRANCH
SOURCE

8.1.4 Get Loan product details on click of the product

Endpoint:
"http://100.76.149.70:7005/CLProdDetailsService/CLProdDetails/QueryProdDetails/productCode/{productCode}"

Name: "LoanProductDetail "

Type: "REST"

Rest Service Method Type: "GET"

Path Param: productCode

Headers: USERID
BRANCH
SOURCE

8.2 Services related to Account Operations:

8.2.1 Account Information

The details below can be viewed for the account as part of the account information.

8.2.1.1 Get Account Balance and Latest Transactions

Endpoint:"http://<IP>:<PORT>/AccountBalanceService/AccountBalance/QueryAcctBal/brhcode/{brhcod}/custAcNo/{custAcNo}"

Description: "Account balance service to fetch account balance details"

Name: "AccountBalanceService"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: Brhcode
custAcNo

Headers: BRANCH

USERID

SOURCE

8.2.1.2 Get Account Details

Endpoint:"http://<IP>:<PORT>/CustomerAccountService/CustomerAccount/QueryCustAcc/brn/{brn}/acc/{acc}"

Description: "Get Customer account details"

Name: "QueryAccountdetails"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: accbrn

Headers: BRANCH

SOURCE

USERID

8.2.1.3 Get Account Address

Endpoint: "http://<IP>:<PORT>/fcubs-customer-acc service/CustomerAccountQuery/QueryAccountAddress/acctNo"

Description: "ViewAccountaddress"

Name: "ViewAccountaddress"

Type: "REST"

Rest Service Method Type: "GET"

Query Param: acctNo

Headers: userId

BranchCode

Source

8.2.2 Account Address Update

8.2.2.1 Populate Account Address

Endpoint: "http://<IP>:<PORT>/fcubs-customer-acc-service/CustomerAccountQuery/QueryAccountAddress/acctNo"

Description: "ViewAccountaddress"

Name: "ViewAccountaddress"

Type: "REST"

Rest Service Method Type: "GET"

Query Param: acctNo

Headers: userId

BranchCode

Source

8.2.2.2 Updated Account Address

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/updateAddress/custAcNo/{custAcNo}"

Description: "account address modification"

Type: "REST"

Rest Service Method Type: "POST"

Path Param: CustAcNo

Headers: userId
branchCode

Query params: address1
address2
address3
address4
location
media
pincode
countryCode

8.2.3 Account Status Change

8.2.3.1 Get Account Status

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/getAccountStatusByAccount/custAcNo/{custAcNo}"

Name:"GetAccountStatus"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: custAcNo

Headers: userId
branchCode

8.2.3.2 Update Account Status

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/updateAccountStatus/custAcNo/{custAcNo}"

Name: "UpdateAccountStatus"

Type: "REST"

Rest Service Method Type: "PUT"

Path Param: custAcNo

Query Param: acStatNoCr
acStatNoDr
acStatCrOvd
acStatDrOvd
acStatFrozen

Headers: userId
branchCode

8.2.4 Create Amount Block

Endpoint:"
http://<IP>:<PORT>/CustomerAccountAmountBlockService/CustomerAccountAmountBlock/CreateAmtBlk
"

Description: "CreateAmountBlock"

Name:"CreateAmountBlock"

Type:"REST"

Rest Service Method Type: "POST"

Headers: BRANCH
SOURCE
USERID

8.2.5 Activate Dormant Account

8.2.5.1 Query Account Dormant State

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/getDormantStatusByAccount/custAcNo/{custAcNo}"

Description: "get dormant status"

Name: "GetAccountStatDormant"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: custAcNo

Headers: userId
branchCode

8.2.5.2 Activate Account Dormant Stat if Dormant:

Endpoint:"http://<IP>:<PORT>/obremo-srv-customer-query-service/corecustomers/activateDormantAcc/custAcNo/{custAcNo}/acStatDormant/{acSt atDormant}"

Description: "update account dormant status'"

Name:"UpdateAccountStatDormant"

Type: "REST"

Rest Service Method Type: "PUT"

Path Param: custAcNo
acStatDormant

Headers: userId
branchCode

8.2.6 Setup Standing Instructions:

Endpoint:" http://<IP>:<PORT>/StandingInstructionService/StandingInstruction/CreateContract"

Name: "StandingInstruction"

Type: "REST"

Rest Service Method Type: "POST"

Headers: BRANCH
USERID
SOURCE

8.3 Services related to Customer Operations:

8.3.1 Get Customer Information:

Endpoint:" http://<IP>:<PORT>/CustomerService/Customer/QueryCustomer/custno/{custno}"

Description: "Get the Customer Details"

Name:"CustomerService"

Type: "REST"

Rest Service Method Type: "GET"

Path Param: custno

Headers: BRANCH
USERID
SOURCE

8.3.2 Update Customer Email and Phone Number:

Endpoint: "http://<IP>:<PORT>/obremo-srv-customer-query -
service/corecustomers/updateCustomerDetails"

Name: "UpdateCustomerEmailPhNo"

Type: "REST"

Rest Service Method Type: "PUT"

Query Param: customerNo
eMail

mobileNumber

Headers: userId

branchCode

8.4 WEB Search for the Oracle FLEXCUBE related Key words (User Manul Search Over WEB):

If user inputs a keyword to search in the WEB, by default search results will be related FLEXCUBE.

Endpoint: "https://api.cohere.ai/v1/generate"

Description: " Co.Generate endpoint"

Name: "CohereRest"

Type: "LLM"

Service Method Type: "POST"

AuthType: "bearerToken"

Token: "Token is a licensed, customer has to purchase accordingly as per their usage"

Body: {

"model": "command",

"prompt": " Oracle FLEXCUBE Universal Banking",

"max_tokens": 300,

"temperature": 0.9,

"k": 0,

"stop_sequences": [],

"return_likelihoods": "NONE"

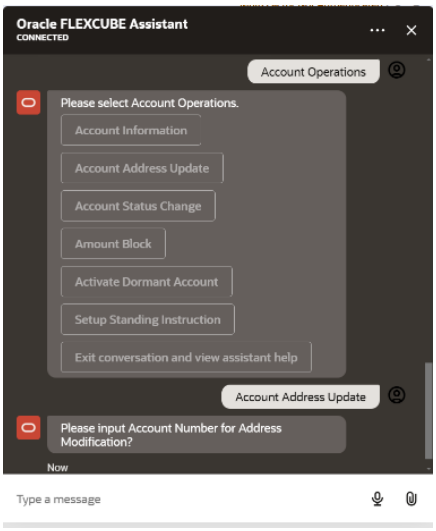
}

9. Testing ChatBot

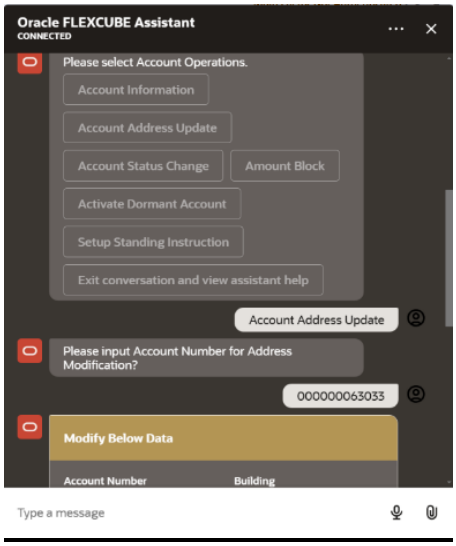
This chapter provides sample test scenarios for the chatbot, demonstrating how it processes user queries and responds based on the application context.

9.1 Update Account Address

1) In the **chatbot**, under the **Account and Customer Services** section, select **Account Operations**. The chatbot displays pre-defined services for Account Operations.

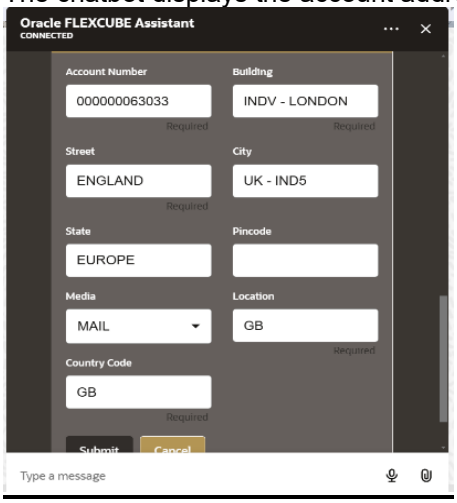


2) Select **Account Address Update**.
The chatbot responds with a question to enter the account number for the account address Modification.



3) Specify the account number in the text box.

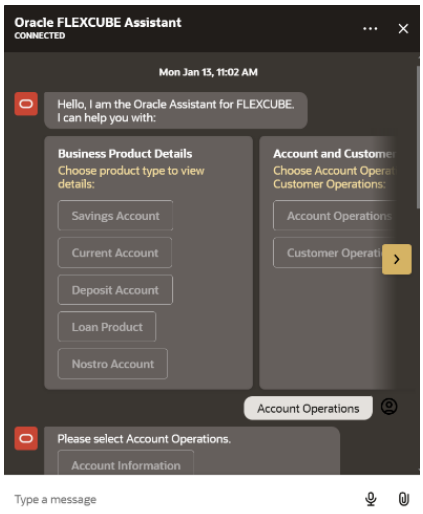
The chatbot displays the account address details for the account number.



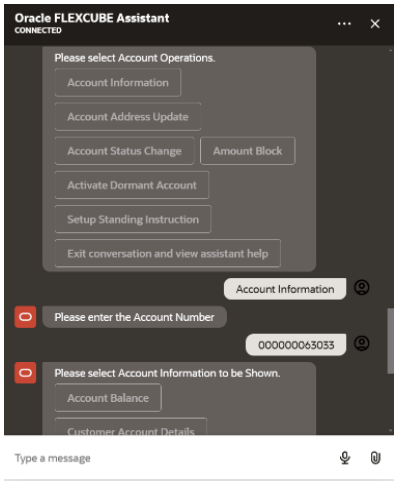
4) Specify the required details to be changed in the fields and click **Submit**.
The confirmation message displays that the address details have been updated successfully.

9.2 View Account Balance

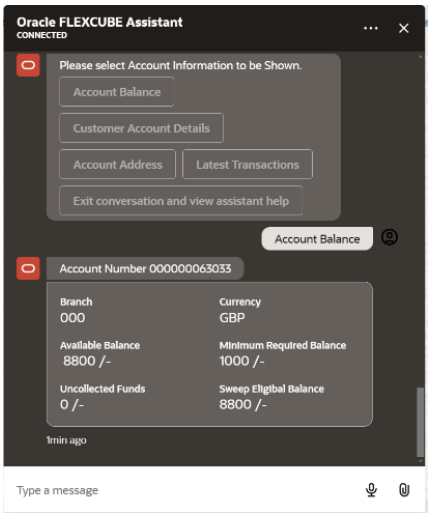
1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for Account Operations.



2) Select **Account Information**.
The chatbot responds with a question to enter the account number for the account information.



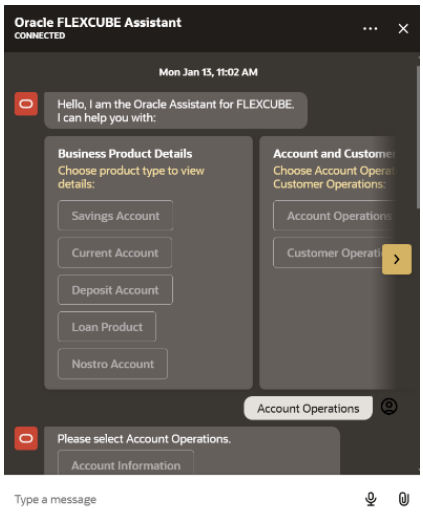
3) Specify the account number in the text box.
The chatbot displays the pre-defined options related to the account information.



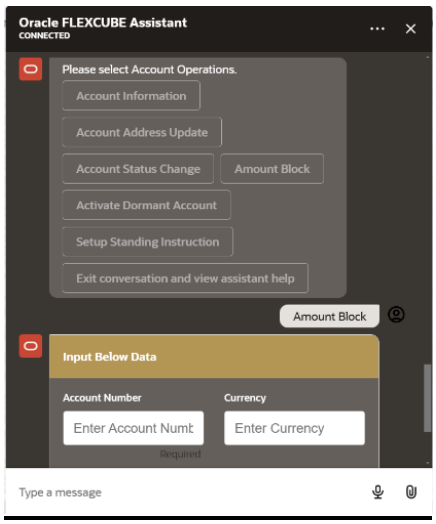
4) Select **Account Balance**.
The chatbot displays the account balance details for the account number.

9.3 Create Amount Block

1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for Account Operations.



2) Select **Amount Block**.
The chatbot displays the fields related to the amount block.



3) Specify the following details in the fields.

Note: The fields that are marked with Required are mandatory.

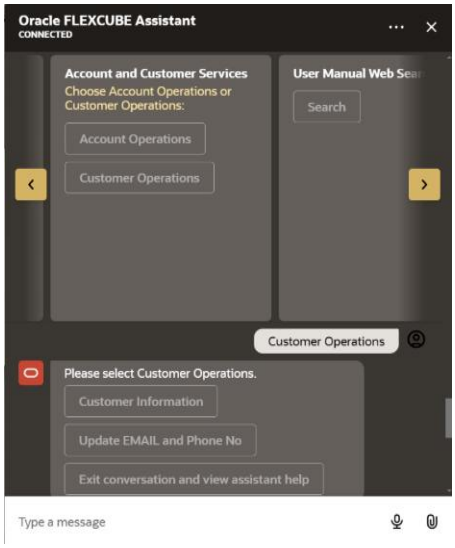
For more information, refer to the field description table below.

Field	Description
Account Number	Specify the account number to create the amount block.
Branch	Specify the branch associated with the account number.
Currency	Specify the currency.
Amount	Specify the amount to be blocked.

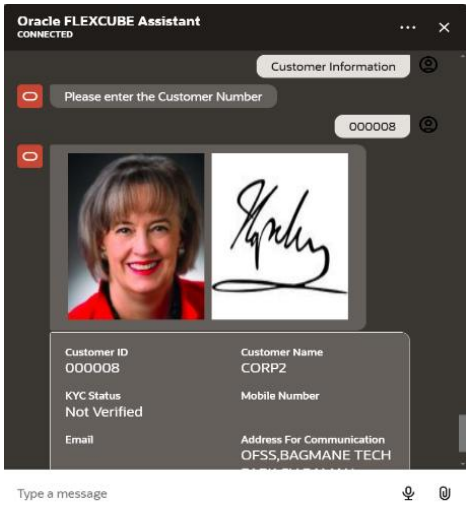
4) Click **Submit**.
The confirmation message displays that the amount block has been created successfully.

9.4 View Customer Information

1) In the Chatbot, under the **Account and Customer Services** section, select **Customer Operations**.
The **chatbot** displays pre-defined services for Customer Operations.



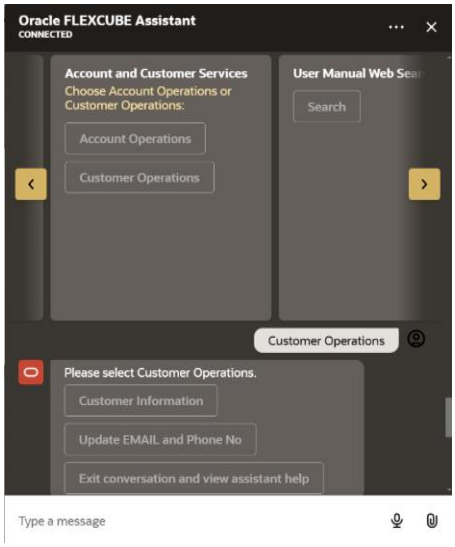
2) Select **Customer Information**.
The chatbot responds with a question to enter the Customer Number.



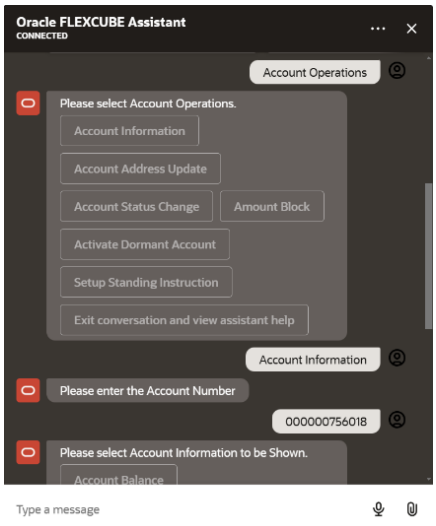
3) Specify the Customer Number in the text box.
The chatbot displays the customer information for the customer ID.

9.5 Activate Dormant Account

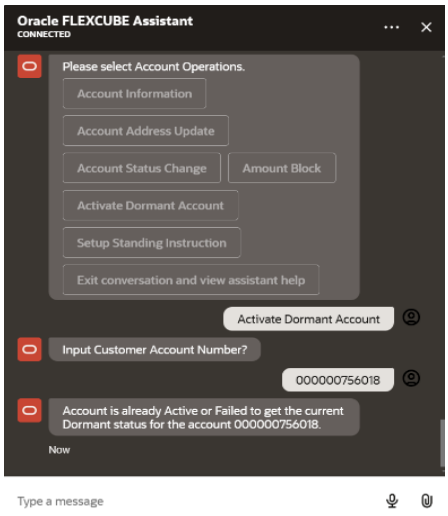
1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for Account Operations.



2) Select **Account Information**.
The chatbot responds with a question to enter the account number.



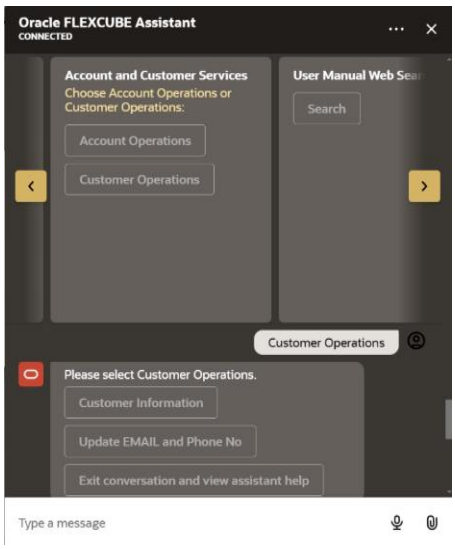
3) Specify the account number in the text box.
The chatbot displays the pre-defined options related to the account information.



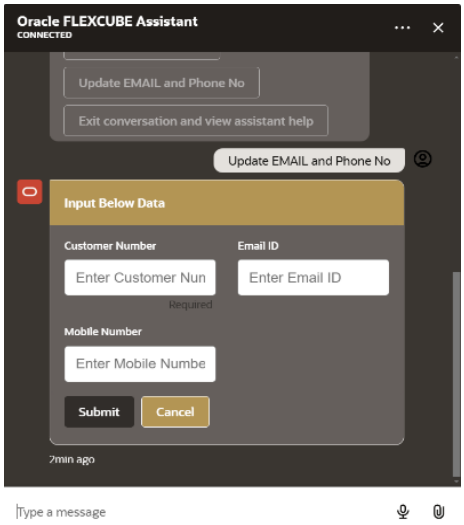
5) Select **Activate Dormant Account**.
   The chatbot responds with a question to input the customer account number.
6) Specify the account number.
   The chatbot displays the status of a dormant account for the account number.

9.6 Update Email and Phone Number

1) In the **Chatbot**, under the **Account and Customer Services** section, select **Customer Operations**.
   The chatbot displays pre-defined services for Customer Operations.



2) Select **Update EMAIL and Phone No**.
   The chatbot displays the fields related to the amount block.



3) Specify the following details in the fields.

Note: The fields that are marked with Required are mandatory.

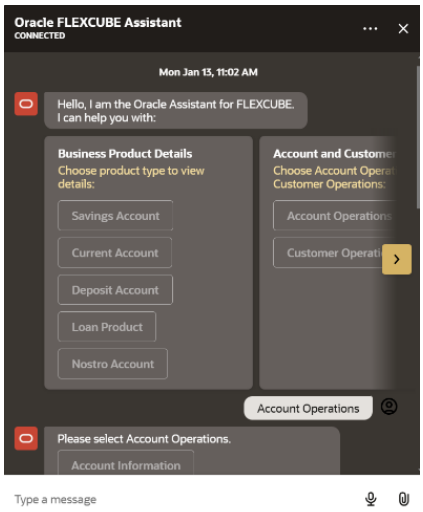
For more information, refer to the field description table below.

Field	Description
Customer Number	Specify the customer number.
Email ID	Specify the email ID of the customer.
Mobile Number	Specify the mobile number of the customer.

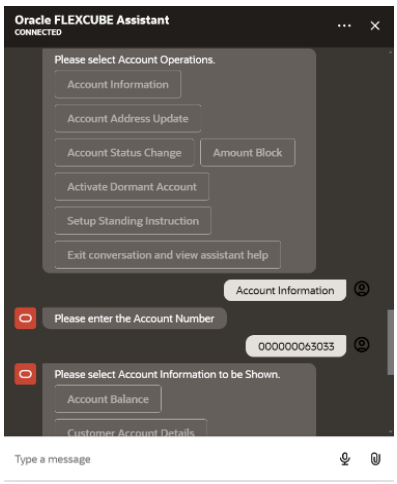
4) Click **Submit**.
The confirmation message displays that the email ID and mobile number have been updated successfully.

9.7 View Account Address

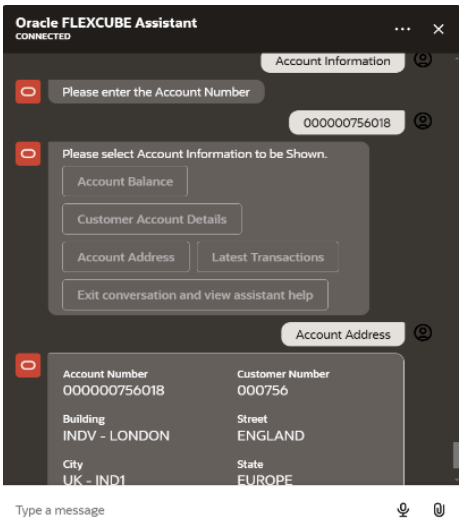
1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for Account Operations.



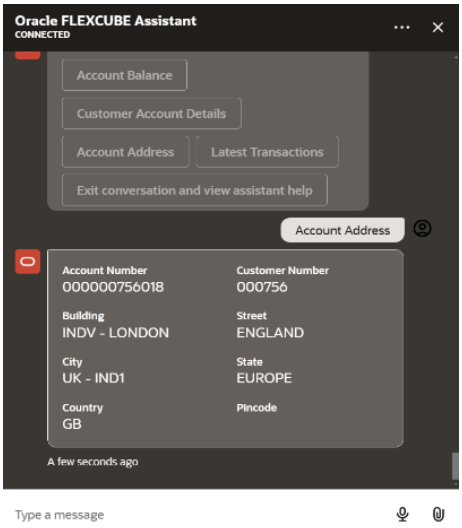
2) Select **Account Information**.
The chatbot responds with a question to enter the account number for the account information.



3) Specify the account number in the text box.
The chatbot displays the pre-defined options related to the account information.

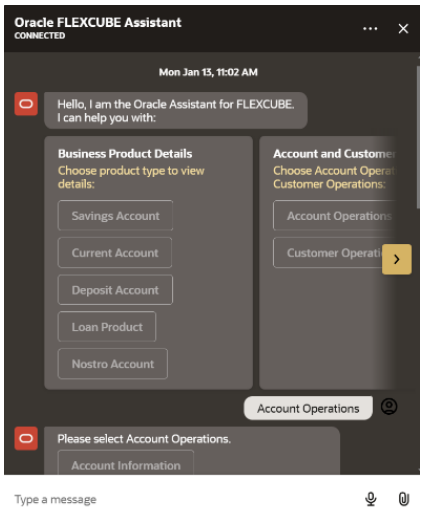


4) Select **Account Address**.
The chatbot displays the account address details for the account number.

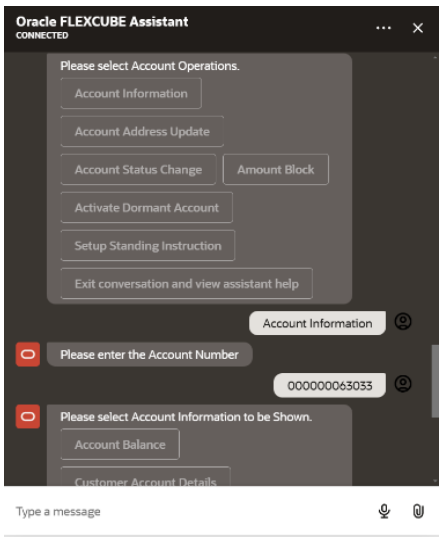


9.8 View Account Details

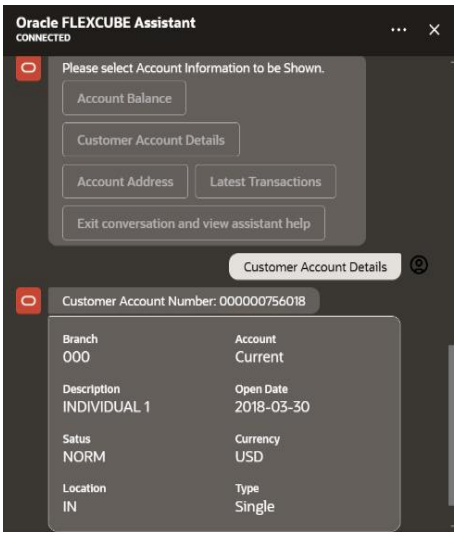
1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for Account Operations.



2) Select **Account Information**.
The chatbot responds with a question to enter the account number for the account information.



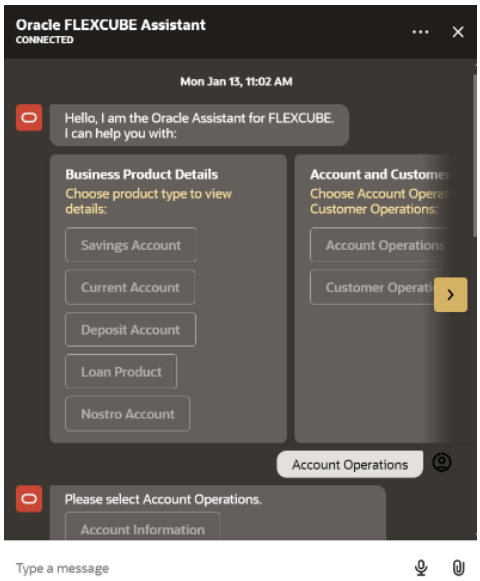
3) Specify the account number in the text box.
The chatbot displays the pre-defined options related to the account information.



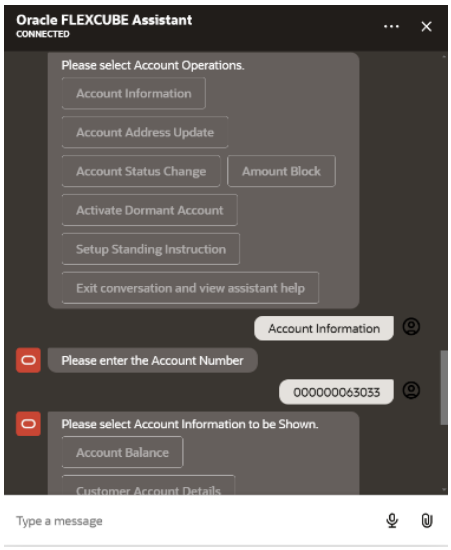
4) Select **Customer Account Details**.
The chatbot displays the customer account details for the account number.

9.9 View Latest Transactions

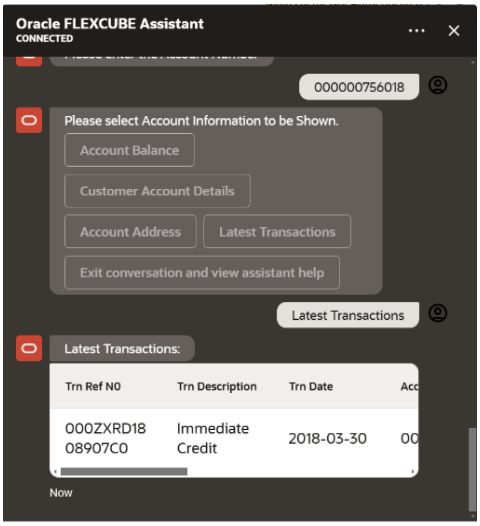
1) In the **Chatbot**, under the **Account and Customer Services** section, select **Account Operations**.
The chatbot displays pre-defined services for account operations.



2) Select **Account Information**.
The chatbot responds with a question to enter the account number for the account information.



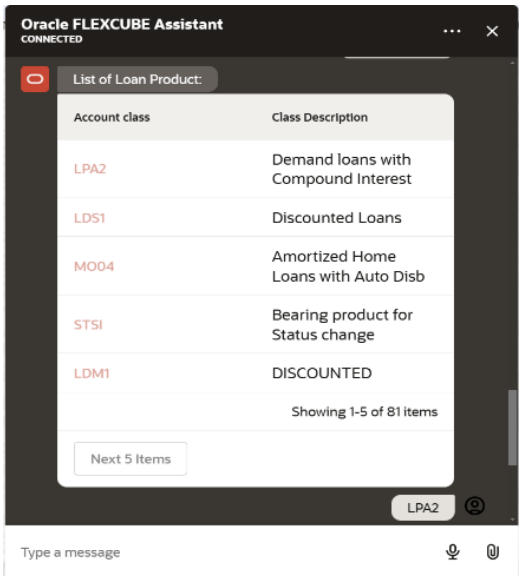
3) Specify the account number in the text box.
The chatbot displays the pre-defined options related to the account information.



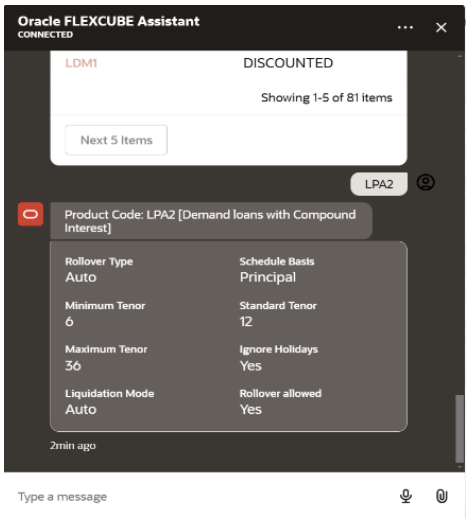
4) Select **Latest Transactions**.
The chatbot displays the latest transaction for the account number.

9.10 View Loan Product Details

1) In the **Chatbot**, under the **Business Product Details** section, select **Loan Product**.
The chatbot displays the list of loan products.

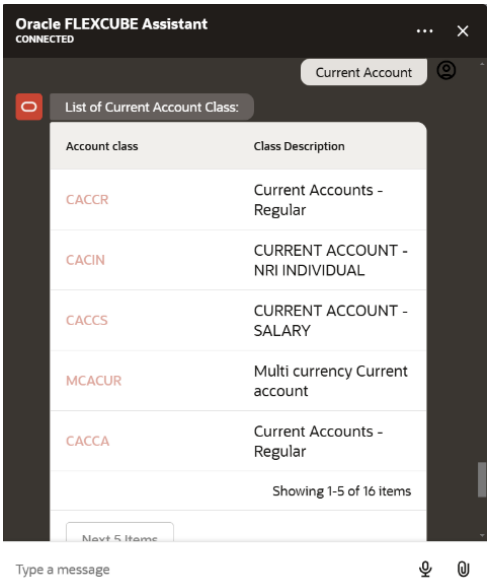


2) Select one of the loan products from the list.
The chatbot displays the details of the selected loan product code.

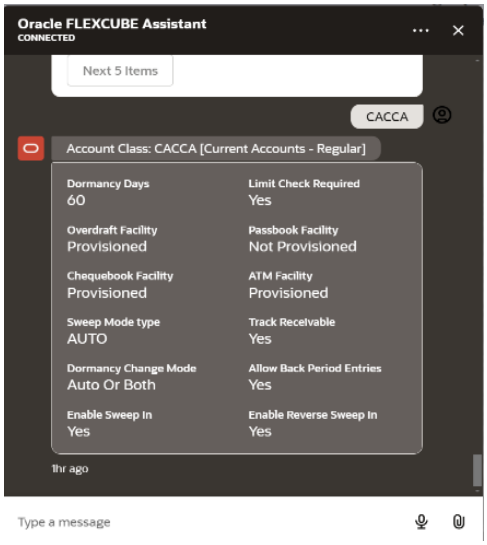


9.11 View Current Account Details

1) In the **Chatbot**, under the **Business Product Details** section, select **Current Account**.
The chatbot displays the list of current account classes.

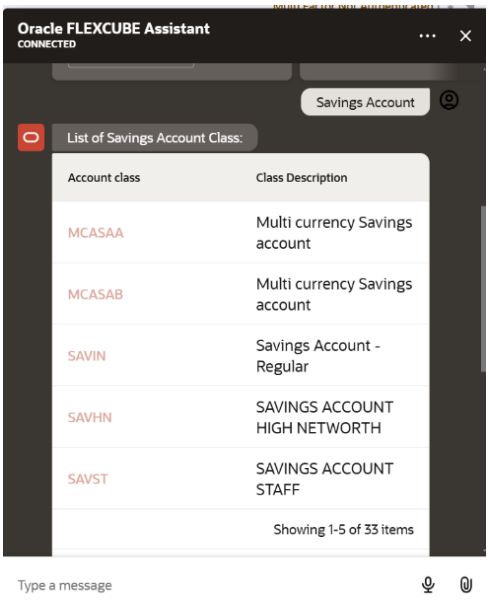


2) Select one of the current account classes from the list.
The chatbot displays the details of the selected current account class.

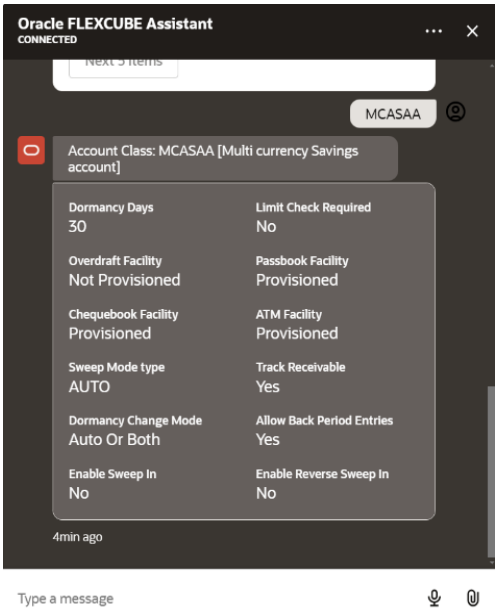


9.12 View Savings Account Details

1) In the **Chatbot**, under the **Business Product Details** section, select **Savings Account**.
The chatbot displays the list of savings account classes.

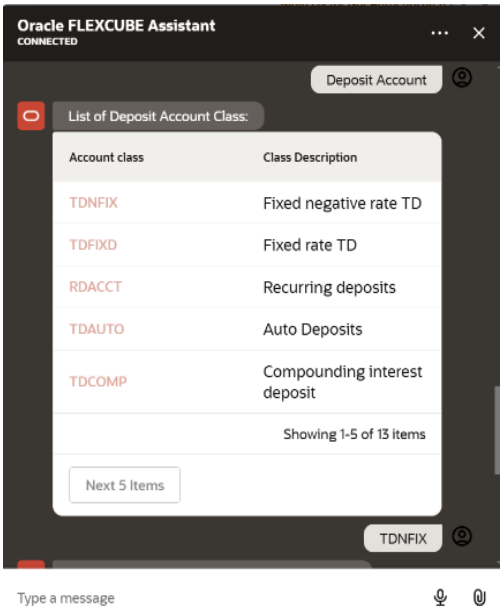


2) Select one of the savings account classes from the list.
The chatbot displays the details of the selected savings account class.

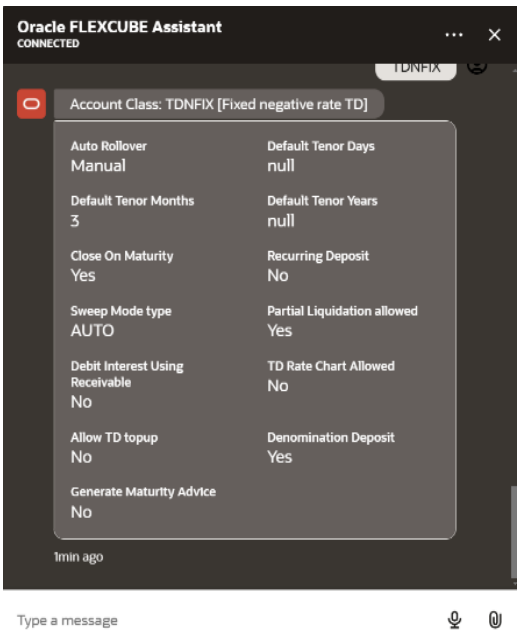


9.13 View Deposit Account Details

1) In the **Chatbot**, under the **Business Product Details** section, select **Deposit Account**.
The chatbot displays the list of deposit account classes.

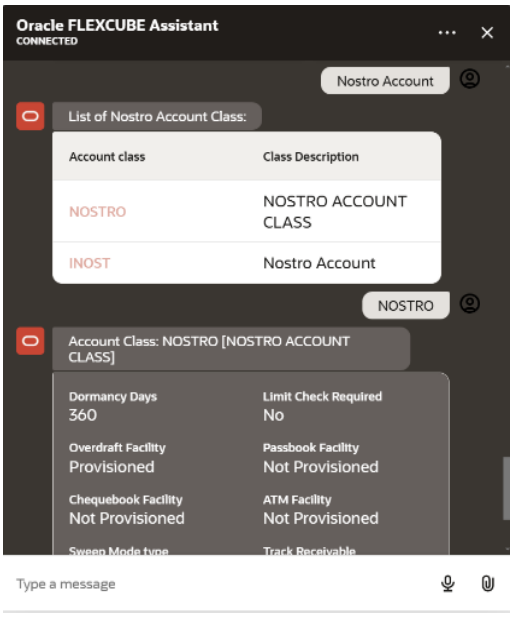


2) Select one of the deposit account classes from the list.
The chatbot displays the details of the selected deposit account class.

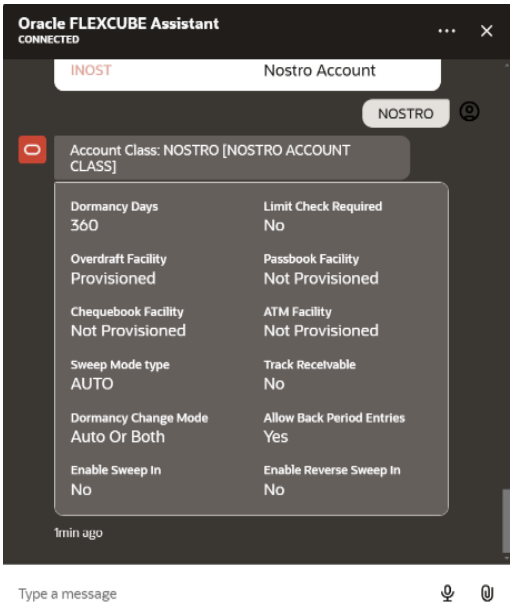


9.14 View Nostro Account Details

1) In the **Chatbot**, under the **Business Product Details** section, select **Nostro Account**.
The chatbot displays the list of nostro accounts.



2) Select one of the nostro account classes from the list.
The chatbot displays the details of the selected nostro account class.



9.15 User Manual Web Search

1) In the **Chatbot**, under the **User Manual Web Search** section, click **Search**.
The chatbot responds with a question to do a web search related to FLEXCUBE UBS.



2) Enter the keyword related to the Oracle FLEXCUBE UBS.
The chatbot displays the summary of the keyword entered.





Oracle Digital Assistant Integration Guide
October 2026
Version 14.8.3.0.0

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