Oracle® Cloud
Manage Credit-Increase Requests

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Contents

Preface

This document describes how to install, configure, and run this recipe in Oracle Cloud Infrastructure Process Automation.

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `https://www.oracle.com/corporate/accessibility/`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `https://support.oracle.com/portal/` or visit `Oracle Accessibility Learning and Support` if you are hearing impaired.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- Oracle Cloud Infrastructure Process Automation documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to manage customer requests for credit-line increases through Oracle Cloud Infrastructure Process Automation.

> **✎ Note:**
>
> The recipe is meant only for guidance and is not warranted to be error-free.

Overview

This recipe provides a mechanism to manage credit-line increase requests, according to the policies of the issuing company.

To run the recipe, you must create a process application using the recipe, and configure the roles and other resources of the recipe. When a customer submits a credit-line increase request, the process flow of the recipe is triggered. It directs the request to a finance manager for approval of individual items in the request (credit history, default risk, and so on), and then to a Chief Financial Officer (CFO) for an overall approval. If the request is approved, the process flow can communicate the approval to an external system (for example, a finance application) for recording. For this, you'll have to configure a connector to the third-party system. Finally, a confirmation message is sent to the customer's email address.

System and Access Requirements

- Oracle Cloud Infrastructure Process Automation, Version 23.12 or higher

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Perform Prerequisite Tasks

You must perform the following configuration tasks on your Oracle Identity Cloud Service (IDCS) instance in order to successfully run the recipe.

- Assign IDCS application roles
- Create the required users in IDCS

For details, see Manage Access and Assign Roles.

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Select and Configure the Recipe

On your Oracle Cloud Infrastructure Process Automation instance, create a process application using the recipe to deploy and configure the recipe's resources.

1. On the Designer home page, click **Create**. In the Create application pane, select **Create application from recipe**.

2. Find the recipe of your choice, then click **Select**.

   The Create application from recipe pane opens.

3. Review the name, version, and description for the application, and click **Create**.

   The process application's main page opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the application.

Configure Roles

1. Click the **Roles** tab to view the roles present in the process application. The following roles are displayed:

   • **Customer**: Users that request the credit-limit increase.

   • **Finance Manager**: Users that approve the customer's credit history, default risk, and so on.

   • **CFO**: Users that approve the overall request.

   • **Process Owner**: Users that handle updates to the finance application.

   • **Process Reviewer**: Users that review the requests.

2. Assign the right users to each role.

   a. Click a role to open the page that lists the users, groups, and permissions for the role.

   b. Delete the default users assigned, if any.

   c. In the **Search by** drop-down field, select **Users**.

   d. In the **Search for users or groups** field, search and select a user.

      The user you select is added to the role.

   e. Select the necessary permission for the user in the Application Permission Level section.

3. To return to the process application's main page, click the application's name in the breadcrumb.

Configure Connectors

Optionally, add connectors to your application to connect to third-party systems, and record the approved requests. You can create a connector to an external finance application. See Configure REST Connectors in Designer.

> **Note:**
>
> Without connectors, you can only test run this application in the Process
> Workspace.

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Activate and Run the Recipe

After you've configured the roles and other resources, you can activate and run the application.

1. On the process application's main page, click **Activate**. In the Activate pane, with the default snapshot selected, click **Activate**.

   A message confirms that the application has been activated.

2. Run the recipe.

   a. In the Activate pane, click **Test in Workspace**.

      A new browser tab opens with Workspace.

   b. Log in as a user with the Customer role, and click the activated application on the Start Requests page.

      i. In the pane that appears, complete the form and click **Submit** to start an instance of the application.
         You'll receive a notification about your request approval on the email address you provide in the form.

   c. Log in as a user with the Finance Manager role, open the Workspace navigation menu, and click **Tasks** to open the Tasks page.

      i. Under the **My tasks** tab, click a task from the credit approval process.

      ii. In the task details pane, review and update (if required) the form associated with the task, and then click **Approve**.

      iii. Repeat the Steps 2(c)(i) and 2(c)(ii) for all tasks associated with the process, such as credit history, bank reference, and default risk.

   d. Log in as a user with the CFO role, open the Workspace navigation menu, and click **Tasks** to open the Tasks page.

      i. Under the **My tasks** tab, click the task from the credit approval process.

      ii. In the task details pane, review and update (if required) the form associated with the task, and then click **Approve**.

3. Track the running of the process instance in the Workspace. See Track Processes.

4. View the runtime execution details of your process in **Analytics**. See Use Analytics.

5. Log in to the customer's email account specified in the form, and check for the message from Oracle Cloud Infrastructure Process Automation.

   The email message contains the approval details for your credit-increase request.

Related Documentation

• *Using Oracle Cloud Infrastructure Process Automation*