

Oracle® Banking Accounts Cloud Service

Getting Started User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Purpose

This guide helps to get started with Oracle Banking Branch Cloud Services and explains the basic design of Oracle and the common operations that you can follow while using it. The guide must be used as a supplement and read in conjunction with Common Core, Security Management System, and other Oracle Banking Cloud Services user guides.

Audience

This guide is intended for the Customer Service Representatives (CSR) and staff responsible for setting up new products in your bank.

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>.

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 Documents

The related documents are as follows:

- *Getting Started User Guide*
- *Oracle Banking Common Core User Guide*
- *Account Configurations User Guide*
- *Security Management System User Guide*

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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which user supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that user enter.

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

Basic Actions

This basic actions that can be performed on a screen are described in the following table.

Table 1 Basic Actions

Action	Description
Approve	Approve the initiated record. This option displays when the user clicks Authorize .
Audit	View the maker details, checker details, and record status.
Authorize	Authorize the record created. A maker of the screen is not allowed to authorize the record. Only a checker can authorize a record, created by a maker.
Cancel	Cancel the performed action.
Close	Close a record. This action is available only when a record is created.
Collapse All	Hide the details in the sections. This option displays when the user clicks Compare .

Table 1 (Cont.) Basic Actions

Action	Description
Compare	View the comparison through the field values of old record and the current record. This option displays in a widget when the user clicks Authorize .
Confirm	Confirm the performed action.
Expand All	Expand and view all the details in a section. This option displays when the user clicks Compare .
New	Add a new record. When the user clicks New , the system displays a new record to specify the required data.
OK	Confirm the details on the screen.
Reject	Reject the record created. A maker of the screen is not allowed to reject the record. Only a checker can reject a record, created by a maker.
Save	Save the details entered or selected in the screen.
Unlock	Update the details of an existing record. System displays an existing record in the editable mode.
View	View the record details in a particular modification stage. This option displays in the widget when the user clicks Authorize . This option is also displayed in the Tile menu.
View Difference only	View a comparison through the field element values of old record and the current record, which has undergone changes. This option is displayed when the user clicks Compare .

 **Note**

The user must specify values for all the mandatory fields and they are marked as **Required** in the User Interface.

Symbols and Icons

The following symbols and icons are used in the screens.

Table 2 Symbols and Icons - Common



Symbol/Icon	Function
	Minimize
	Maximize

Table 2 (Cont.) Symbols and Icons - Common










Symbol/Icon	Function
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view

Table 2 (Cont.) Symbols and Icons - Common







Symbol/Icon	Function
	List view
	Refresh
	Click to add a new row
	Click to delete an existing row
	Calendar
	Alerts

Table 3 Symbols and Icons - Tiles



Symbol/Icon	Function
	Open status
	Unauthorized status

Table 3 (Cont.) Symbols and Icons - Tiles










Symbol/Icon	Function
	Closed status
	Authorized status
	Rejected status
	Modification Number

Table 4 Symbols and Icons – Audit Details

Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status
	Rejected status

1

Welcome to Oracle Cloud

Oracle Cloud provides the industry's broadest and most integrated cloud platform. It offers flexible deployment options, from the public cloud to your own data center. Oracle Cloud delivers best-in-class services across Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (IaaS).

About Oracle Cloud

Oracle Cloud provides a complete set of cloud services to meet enterprise computing needs.

Oracle Infrastructure as a Service (IaaS) allows you to quickly provision virtual machines, storage, and networking resources to run a wide range of workloads. Oracle manages, hosts, and supports the infrastructure.

Oracle Platform as a Service (PaaS) provides ready-to-use environments for IT and development teams. Teams use these environments to build and deploy applications with Oracle databases and application servers.

Oracle Software as a Service (SaaS) helps organizations run business operations in the cloud. Oracle offers cloud-based solutions for Human Capital Management (HCM), Enterprise Resource Planning (ERP), Supply Chain Management (SCM), and many other business applications. Oracle manages, hosts, and supports these services.

Supported Web Browsers

Oracle Financial Services Cloud Services support the latest version of Google Chrome, Microsoft Edge and Mozilla Firefox.

Note

For more details, refer Oracle Software Web Browser Support Policy [Oracle Software Web Browser Support Policy](#).

Order Oracle Cloud Applications

You can order Oracle Cloud Applications (Software as a Service) offerings by contacting Oracle Sales. After your order is processed, you can then activate your services.

To order a subscription to Oracle Cloud Applications:

1. Scroll down and select the Cloud Service that you are subscribed to.
2. Review the features and capabilities of the service and read the Datasheet.
3. When you are ready to order, scroll up and click Request a Demo.
4. You can either write an email or click Request Now to receive a call from Sales.
5. Enter your Business email, select the confirmation check box, and click Continue.
6. Provide a description and click Request Now.

2

Welcome to Oracle Cloud Service

To get started, you must activate the subscribed Cloud Service.

After activating the cloud service, you can log in as an administrator and perform the following tasks.

- Create and Activate New Cloud Account
- Access the Cloud Account
- Access Oracle Identity and Access Management (IAM) Console
- Onboard new application users for the subscribed cloud services.

After the administrator successfully adds an application user, they can log in and activate their cloud account and use the subscribed cloud services provisioned by the administrator.

This topic contains the following sub-topics:

- [Select a New or Existing Cloud Account](#)
- [Create and Activate New Cloud Account](#)

2.1 Select a New or Existing Cloud Account

Every administrator in a cloud account (tenancy) can access all subscriptions within that account.

To prevent new administrators from accessing existing subscriptions, create a new Oracle Cloud Account and activate new subscriptions in a separate tenancy.

If you do not require separate access controls, add new subscriptions to an existing Oracle Cloud Account.

2.2 Create and Activate New Cloud Account

After you subscribe to the cloud service, you will receive a Welcome to Oracle Cloud email with details to create and activate your new cloud account.

To create and activate a new cloud account

1. Click **Create New Cloud Account** in the email.

The **New Cloud Account Information** screen displays.

Figure 2-1 New Cloud Account Information

What is a Cloud Account?
When you sign up for Oracle Cloud, you get a cloud account and an Oracle Cloud Infrastructure tenancy. Oracle assigns the user's name to the cloud account and the tenancy.

About Regions
A region is a localized geographic area, and an availability domain is one or more data centers located within a region. A region is composed of one or more availability domains. Oracle Cloud Infrastructure resources are either region-specific, such as a virtual cloud network, or availability domain-specific, such as a compute instance.

Your Subscriptions
Order Number: 21D4GHT6
Subscription ID: 21D4GHT6

New Cloud Account Information

First Name: Last Name:

Email:

Password:

Confirm Password:

Tenancy Name:

✖ A value for Tenancy Name is required.

i This will be assigned to your company's or organization's environment when signing into the Console. You can always [rename](#) it later from the Console.

Home Region:

i Your [home region](#) is the geographic location where your account and identity resources will be created. It is not changeable after sign-up. [See Regions](#) for service availability.

Terms of Use
By clicking on the button, you understand and agree that the use of Oracle's web site is subject to the [Oracle.com Terms of Use](#). Additional details regarding Oracle's collection and use of your personal information, including information about access, retention, rectification, deletion, security, cross-border transfers and other topics, is available in the [Oracle Privacy Policy](#).

Create Tenancy

- Specify the following details to sign up.

Table 2-1 New Cloud Account Information

Field	Description
First Name	First name of the person who will be the cloud administrator.
Last Name	Last name of the person who will be the cloud administrator.
Email Address	Email address of the person who will be the cloud administrator. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Note</p> <p>Instructions to log into the new Oracle Cloud Account will be sent to this email address.</p> </div>
Password	Specify the password to access the new cloud account.
Confirm Password	Specify the confirm password. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Note</p> <p>Both Password and Confirm Password must be matched.</p> </div>

Table 2-1 (Cont.) New Cloud Account Information

Field	Description
Tenancy Name	<p>Specify the tenancy name to be associated with the cloud account.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>You cannot modify the tenancy name after it is created. Hence, ensure to provide a valid tenancy name, based on your organization's requirements and naming conventions.</p> </div>
Home Region	<p>Select the Home Region, where the account is located. Check the service availability before selecting the home region. For assistance regarding home region selection, contact Oracle support. Existing customers have to ensure that the identity resources are located in the home region.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>You can subscribe to additional regions but you cannot modify the home region, after provisioning your tenancy.</p> </div>

3. Click **Create Tenancy** to access the New Cloud Creation Confirmation page.

After successful activation, the cloud account administrator will receive a Get Started Now with Oracle Cloud email.

3

Add to an Existing Oracle Cloud Account

If you already have a cloud account associated with your administrator user name, you can add the newly subscribed cloud service to that account.

To add an existing Cloud account:

1. In the welcome email, click **Add** to an existing cloud account.
2. Perform the steps as mentioned in the Access the **Oracle Cloud Infrastructure Identity and Access Management** (IAM) console.
 - [Access the Cloud Account](#)
 - [Create Co-Administrator Users](#)

3.1 Access the Cloud Account

An Administrator can access the Cloud Account activated and associated with their email address.

After your new cloud account is created and activated, you will receive a **Get Started Now with Oracle Cloud** email, to the email address provided while creating the account.

To access your Cloud account:

1. In the **Get Started Now with Oracle Cloud** email, click **Sign In**.
2. Specify the Tenancy name and click **Continue**.
3. Specify the **Username** and **Password** to log in to the OCI Console. Use the same Username and the Password that you provided during activation setup.
4. After successful login, proceed with the multi-factor authentication. Select the configured authentication mode and enter the OTP generated using the Oracle Mobile Authenticator application.

Once the MFA is successfully completed, you can access the Environment Page.

3.2 Create Co-Administrator Users

After you log in to the IAM console, the first task is to create additional user accounts.

You should assign specific user groups to the user accounts that you are creating. There are seeded user groups available that represent the services, users must be mapped to one or more of the user groups, depending on the role that they perform.

For example, you can create a user for each member of your team. Each member can then sign into the account with their credentials. You can also assign each user to specific user groups and apply specific security policies or roles to each group.

You can create the users and map the users to groups for your service. After creating the users, they will receive a Welcome email. The users must activate their accounts and enter a new password to access the services.

Note

A co-administrator will have the same privileges as the existing administrator.

To create a co-administrator user in the IAM Console:

1. In the IAM Console, select Domains (Identity domain) to view the list existing domains.
2. Click the required Domain Name, to access the Domain Details page.
3. In the left pane, click Users and select Create user, to proceed with the user creation.
4. Enter the following details:
 - First Name, Last Name and a valid Username and the Email ID

Note

The username should be alphanumeric and cannot exceed 20 characters. You can enter only hyphen (-) and underscore (_) as special characters. Check the Use the email address as the username check box, as you can only set the username as the login ID and currently setting the email address as the login ID is not supported.

5. Select the Administrator Group.

Note

After a user logs in to a specific cloud service, the user to user-group mapping created in the IAM Console will onboard into the master and mapping tables. Later, if you deselect (remove) a user from a group in Assign User to Groups after provisioning, ensure that you also unmap the user from the corresponding user-group in the Admin Console. This is a mandatory step to complete the unmapping process.

6. After entering the required information, click Create to create and add the new user to the User Summary.

You can also batch import several users using a .CSV file.

4

Subscribe to a Disaster Recovery Infrastructure Region

In Oracle Cloud Infrastructure (OCI), a Disaster Recovery (DR) region is a secondary, geographically separated region that helps ensure service continuity.

To maintain high availability, you must subscribe to a DR region as part of your disaster recovery strategy.

For information on how to subscribe to a DR Infrastructure region, see [Subscribing to an Infrastructure Region](#).

5

Create an Environment

After logging into the Oracle Cloud Infrastructure Console, an Administrator can create one or multiple environments/instances for different user groups.

To create an environment/instance:

1. Log in to Oracle Cloud Infrastructure Console (OCI).

You can view the list of all the environments (instances) provisioned for the one or multiple cloud applications, with the following details:

- **Name:** The cloud application's instance name.
 - **Type:** The instance type.
 - **Life cycle status:** The instance status.
 - **Region:** The region from where the specific instance is active.
 - **Application URL:** The URL to access the instance.
2. From **My Applications**, click the application in which you want to create an environment. Example: Oracle Financial Services Crime and Compliance Management Anti Money Laundering.
 3. On the **Overview** page, click **Environments**.
 4. From the Compartments drop-down list, select the compartment in which you want to create an environment.
 5. Click **Create**, to access the list of cloud services to which the customer has subscribed and the region from where these services are operated.
 6. (Optional) Select the Region to host the OCI environment/instance, from the drop-down list.

If you are not sure about the region, contact My Oracle Support (MoS).

Note

You can select the region only for the first environment/subscription and for the additionally added instances, the region cannot be modified.

7. Enter the following Environment Details, and click Create.

- **Name:** The name of the new environment or instance.

Note

You cannot modify the environment name after the environment is created. Hence, ensure to provide a valid environment name, based on your organization's requirements and naming conventions.

- **Instance type:** Select one of the following instances:

- **Production:** If the environment is used for Production activities.
- **Non-production:** If the environment is used for testing and development purposes. For example, a sandbox environment.
- **Admin email:** The administrator email ID used to log in to the Cloud Console. You can also enter a different email ID that needs to be part of the cloud tenancy. For more details, see [Managing Users](#).
- **Admin first name and Admin last name:** The first and last names of the Administrator.

The environment details are added to the Oracle Cloud Infrastructure Classic Console under the Environments tab (LHS menu). It may take a few hours for the status to change to Active. If there are any issues, you can raise a service ticket with My Oracle Support (MoS).

After the environment is set to Active, click the environment name to view Environment details. Click the Service console URL under Environment Information to create users and groups.

6

Access Oracle Identity and Access Management

Oracle Cloud Infrastructure Identity and Access Management (IAM) provides identity and access management capabilities, including authentication, single sign-on (SSO), and identity lifecycle management. It supports Oracle Cloud services as well as Oracle and non-Oracle applications, whether they run as SaaS, in the cloud, or on-premises.

Employees, business partners, and customers can securely access applications anytime, from anywhere, and on any device.

IAM integrates with existing identity stores, external identity providers, and applications across cloud and on-premises environments. This integration simplifies user access management.

IAM provides the security platform for Oracle Cloud. It allows users to access, develop, and deploy business applications such as Oracle Human Capital Management (HCM) and Oracle Sales Cloud, as well as platform services such as Oracle Java Cloud Service and Oracle Business Intelligence (BI) Cloud Service.

Administrators and users use IAM to create, manage, and access a cloud-based identity management environment securely and efficiently. They do not need to manage the underlying infrastructure or platform components.

To add users to your Cloud Services, navigate to the Oracle Identity and Access Management (IAM) Console.

To access the IAM Console:

1. Log in to [Cloud.Oracle.com](https://cloud.oracle.com), to view all the details pertaining to your cloud order.
Access the service link from the console to start using your subscribed cloud service.
2. Enter the Cloud Account Name and click Next to access the IAM Console.
3. Click Change tenancy option if you want to use a different tenancy.
4. Ensure that the displayed identity domain matches the expected value.

Note

Cloud environments are created under the Default identity domain. If you need to assign your environment to a different identity domain, raise a Service Request.

5. Log in with your Username and Password.
As an Administrator, you can create and manage users with different access rights to the Cloud Service.
For example, the IAM Administrator has superuser privileges for an Oracle Identity and Access Management Domain. This administrator can create users, groups, group memberships, and so on.
- [Activate Application User Account](#)

6.1 Activate Application User Account

A user provisioned by their administrator can use the specific cloud services they have subscribed to.

When an administrator completes provisioning an application user, the user receives an account activation email from Oracle.

To log in and activate your application user account:

1. Open the email received from Oracle and review the information about your service in the email.
2. Click **Activate Your Account**. You will be prompted to change your password on the initial log in.
3. Enter your new credentials in the **Reset Password** window to activate your account. After the password is successfully reset, a **Congratulations** message is displayed.
4. Access the **Application URL** shared by the administrator.
5. Enter your credentials to sign in to your account and access the **Welcome Page**.

7

Application Access

This topic describes the application access.

The user can access any application using the link provided by the administrator.

Contact the administrator for URL and the login credentials.

- [Sign In](#)
This topic describes the systematic instruction to sign in to the application.
- [Sign Out](#)
This topic provides systematic instruction to log out from the application.

7.1 Sign In

This topic describes the systematic instruction to sign in to the application.

Make sure that the valid user name and password are created for the user.

1. Specify the URL in the browser address and press **Enter**.
The **Sign In** screen displays.

Figure 7-1 Sign In



The screenshot shows a web-based sign-in interface. At the top, the word "ORACLE" is displayed in a bold, red, sans-serif font. Below the logo, the text "User Name *" is followed by a white rectangular input field. Underneath that, the text "Password *" is followed by another white rectangular input field. At the bottom of the form, there is a dark blue button with the text "Sign In" in white. The entire sign-in area is set against a light gray background with a subtle pattern.

2. Specify **User Name** and **Password**.
For more information on fields, refer to field description table.

Table 7-1 Sign In - Field Description

Field	Description
User Name	Specify the user name provided by the administrator.
Password	Specify the password provided by the administrator.

3. Click **Sign In** to login to the application.

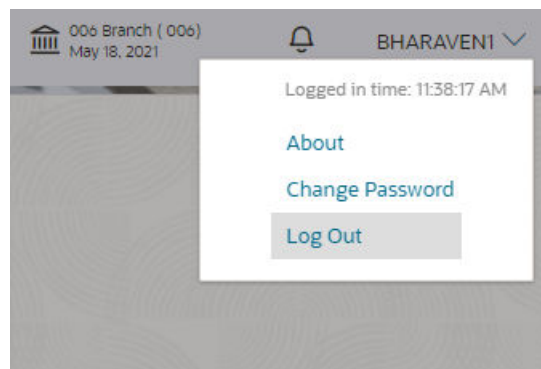
7.2 Sign Out

This topic provides systematic instruction to log out from the application.

Make sure that all the fields are entered and saved.

1. In the selected application, navigate to toolbar.
2. From toolbar, click user name logged into the application.

The **User Profile** fly-out screen displays.

Figure 7-2 Sign Out

3. Click **Log Out** to sign out from the application.

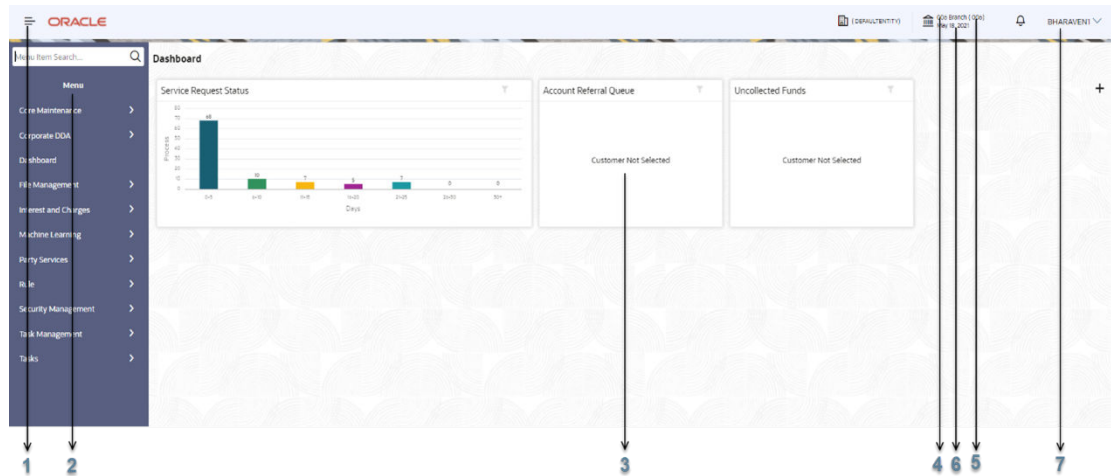
8

Application Environment

This topic provides information about the application environment.

On successful login, the application environment screen displays depending on the user privileges.

Figure 8-1 Application Environment



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

Table 8-1 Application Environment – Field Description

Number	Field	Description
1	Hamburger Menu	Click expand/collapse the menu.
2	Menu	Click to navigate/open the screens associated with the application.
3	Display Grid	Displays the screens/dashboards selected using the menu.
4	Branch Name	Displays the name of the branch.
5	Branch Code	Displays the branch associated with the bank. Click to select the branches associated with the logged in user.
6	Application Date	Displays the last performed application date of branch's EOD.
7	User Profile	Click to expand/collapse the menu.
8	Sub-Menu	Click to navigate/open the screens associated with the application. These are the screens associated under the Menu depending on the user privileges.

9

How To

This topic describes about the different types of actions that the user can perform.

As a new user, the user need to perform a set of tasks that are similar in all the screens such as view, edit, delete existing records, and more.

When the user is working with records, it is important to remember that any records that user create, view, edit, delete, and more are determined by administrator settings such as user profile or permission set. Work with the administrator to ensure that the user have access to the records and data.

- [View Records](#)
This topic describes about viewing the records.
- [Search the Records](#)
This topic provides systematic instructions to search the records.
- [Edit the Records](#)
This topic provides systematic instructions to edit the records.
- [Copy the Records](#)
This topic provides systematic instructions to copy the record.
- [Unlock the Records](#)
This topic provides systematic instructions to unlock the record.
- [Delete the Records](#)
This topic provides systematic instructions to delete the record.
- [Print the Records](#)
This topic provides systematic instructions to print the record.
- [Authorize the Records](#)
This topic provides systematic instructions to authorize the record.
- [Minimize and Maximize Records](#)
This topic provides systematic instructions to minimize the screen.
- [Close the Records](#)
This topic provides systematic instructions to close the record.
- [Dashboard Screen](#)
This topic describes about the various actions that are performed in the Dashboard Screen.
- [Mandatory and Optional Fields](#)
This topic describes about mandatory and optional fields.
- [Add Tile](#)
This topic describes the systematic instructions to add the tile.
- [Remove Tile](#)
This topic describes the systematic instructions to remove the tile.
- [Reorder Tile](#)
This topic describes the systematic instructions to reorder the tile.

- [Expand Tile](#)
This topic describes the systematic instructions to expand the tile.

9.1 View Records

This topic describes about viewing the records.

The user can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster.

A few different formats to view the records are described.

- [Tile View](#)
This topic describes about view the records in Tile View.
- [List View](#)
This topic describes about view the records in list view.

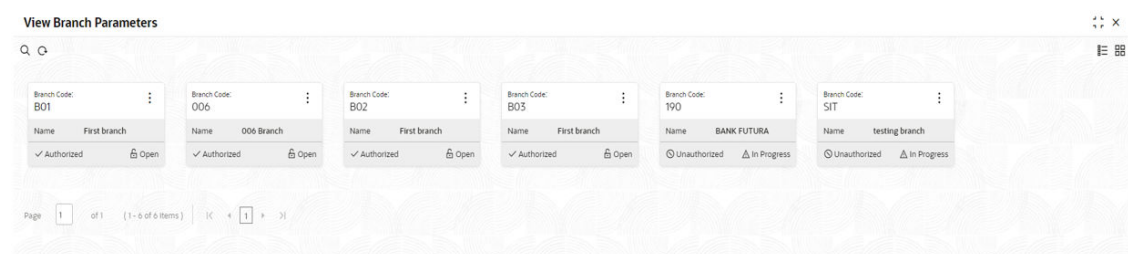
9.1.1 Tile View

This topic describes about view the records in Tile View.

Specify **User ID** and **Password**, and login to **Home** screen.

The default summary view of the records are tile view. The user can view the records that displays in a tile format.

Figure 9-1 Tile View

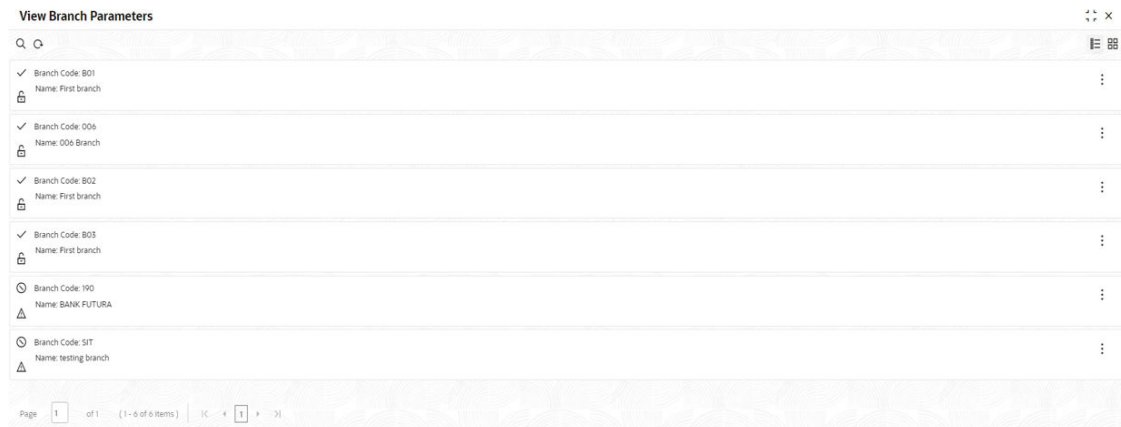


9.1.2 List View

This topic describes about view the records in list view.

Specify **User ID** and **Password**, and login to **Home** screen.

The list view displays the configured records in a list format.

Figure 9-2 List View

9.2 Search the Records

This topic provides systematic instructions to search the records.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In the selected screen, click the **Search** button.

The fields associated with the screen displays.

Figure 9-3 Search Records

2. Specify the required fields.

3. Click **Search** button.

The requested record displays.

9.3 Edit the Records

This topic provides systematic instructions to edit the records.

Specify **User ID** and **Password**, and login to **Home** screen.

Make sure you have the privileges to know the guidelines to modify the records.

1. In a selected screen, click a record to make the required changes.

2. Click **Save**, to update the modified record.

9.4 Copy the Records

This topic provides systematic instructions to copy the record.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In a selected screen, click the record that need to copy.
2. Click **Copy** to copy the selected record details and do the required changes to the record.
3. Click **Save** to save the modified record.

9.5 Unlock the Records

This topic provides systematic instructions to unlock the record.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In a selected screen, click the record that need to unlock.
2. Click **Unlock** to unlock the selected record details and do the required changes to the record.
3. Click **Save** to save the modified record.

9.6 Delete the Records

This topic provides systematic instructions to delete the record.

Specify **User ID** and **Password**, and login to **Home** screen.

Make sure that the have privileges and know the guidelines for deleting the records.

1. In a selected screen, click the record that need to delete.
2. Click **Delete** to remove the record.

9.7 Print the Records

This topic provides systematic instructions to print the record.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In a selected screen, click the record that need to print.
2. Click **Print** to view the record in a print format.

The selected record is printed.

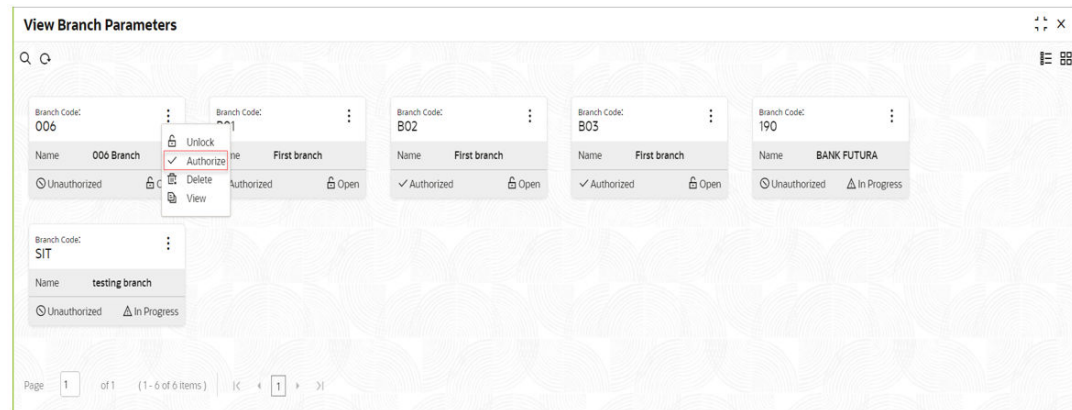
9.8 Authorize the Records

This topic provides systematic instructions to authorize the record.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In a selected screen, click the record that need to authorize.
2. Click **Authorize**.

The authorized records associated with the screen displays.

Figure 9-4 Authorize Records

3. Select the required record that must be authorized.
4. Click **Confirm** to authorize the record.

Figure 9-5 Authorize Records_Confirm

9.9 Minimize and Maximize Records

This topic provides systematic instructions to minimize the screen.

Specify **User ID** and **Password**, and login to **Home** screen.

1. In the selected screen, click on **Collapse** to minimize the screen.

The minimized screen appears at the bottom of the screen.

2. Click **Maximize** button to maximize the screen.

The screen is maximized.

9.10 Close the Records

This topic provides systematic instructions to close the record.

Specify **User ID** and **Password**, and login to **Home** screen.

- In the selected screen, click **Remove** to close the screen.

The selected record is closed.

Note

If the user is in the middle of creating/modifying the records, an error/warning message appears prompting to save the changes.

9.11 Dashboard Screen

This topic describes about the various actions that are performed in the Dashboard Screen.

There are several actions that can be performed in a selected dashboard screen.

9.12 Mandatory and Optional Fields

This topic describes about mandatory and optional fields.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the **Required** text. If the user tries to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.

9.13 Add Tile

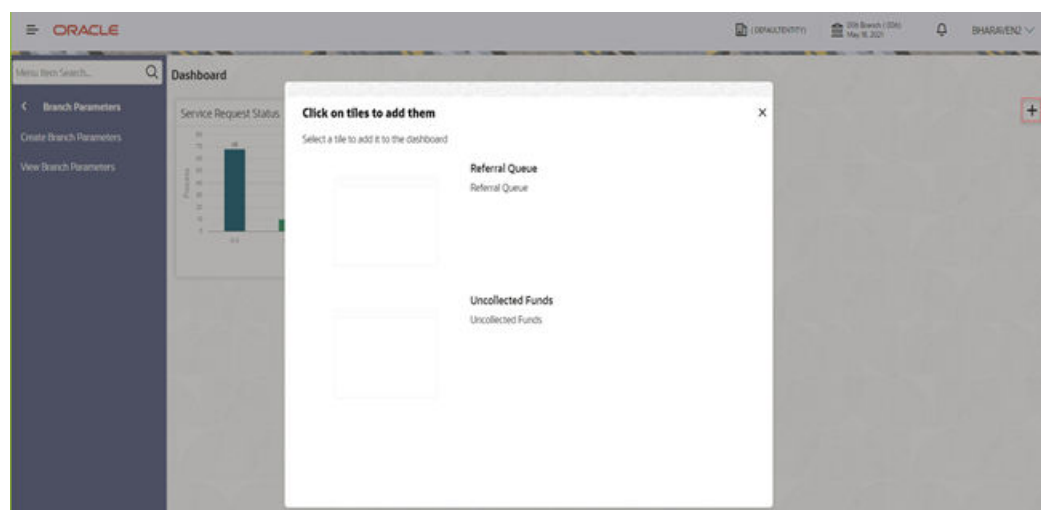
This topic describes the systematic instructions to add the tile.

Specify **User ID** and **Password**, and login to **Home** screen.

1. Click **Add Tiles to Dashboard** to add more available dashboard widget to the dashboard landing page.

The **Click on tiles to add them** screen displays.

Figure 9-6 Click on tiles to add them



2. Click on the dashboard that the user wants to add to the dashboard-landing page. The page is automatically refreshed and displays the added dashboard widget.

9.14 Remove Tile

This topic describes the systematic instructions to remove the tile.

Specify **User ID** and **Password**, and login to **Home** screen.

- Click **Remove** to remove the dashboard widget from the landing page.
The removed widgets are available under the **Add Tiles** option.

9.15 Reorder Tile

This topic describes the systematic instructions to reorder the tile.

Specify **User ID** and **Password**, and login to **Home** screen.

- Select and drag the **Drag to Reorder** to drop the dashboard widget at the desired place.
The page is automatically refreshed and displays the updated order.

9.16 Expand Tile

This topic describes the systematic instructions to expand the tile.

Specify **User ID** and **Password**, and login to **Home** screen.

- Click **Expand Tile** to view all the information of the dashboard widget.
The expanded widget displays on a complete row to view more information.

10

Common Fields

This topic provides the information about all the common fields used in the application.

The list of common fields are as follows.

Table 10-1 Common Fields

Field	Description
Branch Code	The user can select a configured branch code which the user wants to associate with the selected screen.
Maker	Displays the name of the logged in user who created the record.
Customer Number	The user can select a configured customer number which the user wants to associate with the selected screen. The user can configure the customer number using the Create External Customer screen.
Account Number	The user can select a configured account number which the user wants to associate with the selected screen. The user can configure the account number using the Create External Customer Account screen.
Source System	The user can select a configured source system which the user wants to associate with the selected screen. The user can configure the source system using the Create Upload Source screen.
Host Code	The user can select a configured host code which the user wants to associate with the selected screen. The user can configure the host code using the Create Host Code screen.
Currency	The user can select a configured currency which the user wants to associate with the selected screen. The user can configure the currency using the Create Currency Definition screen.
Status	Displays the status of the record: <ul style="list-style-type: none">• Authorized: The record is verified and authorized.• Unauthorized: The record is not verified.• Open: The record is open and waiting for verification.• Locked: The record is locked.• Closed: The record is closed.

11

Common Icons

This topic provides the information about all the common icons used in the application.

The list of common icons are as follows.

Table 11-1 List of Icons

Icon	Description
New	Creates a new record for the selected screen.
Query	View all the configured records for the selected screen.
Unlock	Unlock the configured record for the selected screen.
Search	Search the configured record and select the required record for the selected screen.
Copy	Copy the configured record, modify the details, and save with a different name for the record.
Delete	Remove the configured record for the selected screen.
Reopen	Reopens a closed record for the selected screen.
Close	Closes the configured record for the selected screen.
Print	Print view the configured record for the selected screen.
Authorize	Authorize the configured record for the selected screen.
Collapse	Minimizes the opened screen to the bottom left corner of the screen.
Remove	Closes the opened screen.
Audit	Check the history of the configured records for the selected screen.
Save	Save the configured record for the selected scree
Cancel	Discard the configured record before saving it.
+	Add a row in the grid to provide the required record for the selected screen.
-	Remove a row in the grid for the selected screen.
>	Select a record and move it to the required selected list grid.
<	Select a record and move it back to the available list grid.
> 	Move all the available list of records to the selected list of grid.
 <	Move back all the selected list of records to the available list of grid.

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