

Oracle® Banking Branch

Getting Started User Guide



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Purpose

This guide helps you get started with the Oracle Banking Branch application. It also explains the basic design of the Oracle Banking Branch and the common operations that you can follow while using it.

Module Prerequisite

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

Audience

This guide is intended for the Branch Tellers, Vault Operators, Branch Supervisors, and staff in charge of setting up new products in the bank.

Basic Actions

Most of the screens contain buttons to perform all or few of the basic actions.

Table Basic Actions

| Action | Applicable Stages | Description |
|-------------------------|---|--|
| Next | Initiation, Approval and Hand off Retry | On completion of input of all parameters for a particular stage, user can click Next to navigate to the next tab. |
| Back | Initiation, Approval and Hand off Retry | In case user missed to specify or need to modify the details in the previous tab, click to navigate to the previous tab. |
| Save & Close | Initiation | On click of Save & Close , the input details are saved, and the transaction screen is closed. In case a transaction must be closed midway due to a lack of sufficient information, the maker of the transaction can choose this option. The saved transaction details will be available in My Task . User can select the transaction from My Task and proceed with the transaction or Delete it. |
| Cancel | Initiation, Approval and Hand off Retry | On click of Cancel , the transaction input is cancelled midway without saving any data. User are alerted that the input data would be lost before confirming the cancellation. |
| Submit | Initiation | After submitting the initiation stage, the system validates the transaction with the host and displays the errors or overrides if any. In case of an error, User can modify and resubmit or cancel the transaction. In case of an override, user can modify and resubmit or proceed with the transaction by accepting the overrides. |
| Approve | Approval | The system displays a section where approval remarks if any can be input. Click OK to submit. The transaction is sent to the Host system through OBRH. The Host system validates the transaction again and the transaction is created if all the validations are successful. If the transaction fails, the system displays an error message, and the transaction is moved to Hand-off retry stage. In this stage, the authorize can retry or reject the transaction. On reject, the transaction is sent back to the maker to modify or delete it. |
| Reject | Approval and Hand off Retry | On click of Reject , a transaction is rejected is by the authorize. The system displays a pop-up screen to capture the Rejection remarks if any. Click OK for the transaction to be routed back to the initiation stage. Subsequently, the maker can modify or delete the transaction details. |
| Minimize | Initiation, Approval and Hand-off Retry | On click of Minimize , the transaction input screen is minimized. When the screen is minimized, it appears as to a separate tab within the same web page. |
| Maximize | Initiation, Approval and Hand off Retry | On click of Maximize , the transaction input screen is maximized. User can proceed with the required action on the screen. |
| Reset | Hand off Retry | The Reset button clears all the details previously modified by user and populates the fields with default values. |
| Remarks | Initiation, Approval and Hand-off Retry | Remarks can be used either by the maker or the authorize of the transaction to optionally capture useful information about the transaction. |

Table (Cont.) Basic Actions

| Action | Applicable Stages | Description |
|-------------------|---|---|
| Host Error | Hand Off Retry | Hand off Retry comes into use whenever a transaction input from the mid-office system fails authorization due to Host System rejection. The authorize of the transaction can view the reason for Host rejection and take appropriate action. |
| Overrides | Initiation, Approval and Hand-off Retry | <p>If override messages had appeared during initiation stage and they were accepted by the maker during submission, the Overrides button appears in the Initiation screen if the transaction is subsequently rejected by the authorize. On the Override Details section, click Decline to go back to the transaction screen to modify or cancel it, or click Accept to complete the initiation stage and move the transaction to the approval stage.</p> <p>The Overrides button is displayed in the Approval and Hand-off retry stage if there were any override messages generated during initiation and accepted by the maker. When the Overrides button is clicked, the system displays the overrides accepted by the maker. After verifying the transaction and override details, the authorize can either approve or reject the transaction.</p> <p>The existing Approve Transaction section is modified to display the overrides, if any overrides are raised during the initiation submits.</p> |
| Document | Initiation, Approval and Hand-off Retry | The maker of the transaction can click Document to upload documents that are relevant to the transaction. Once uploaded, the documents are available for viewing during authorization or by the maker. |
| Change Log | Approval | When the authorize clicks Change Log button, the system displays the changes made to the transaction in a pop-up window. By default, the change log is set to display only modified values. The Change Log button has two options, they are, All and Updated. The All button displays both modified and non-modified fields and the Updated button displays only the modified fields. The old and new values are displayed so that the authorize can compare or verify the values and decide on further action. Also, the new values appear in red for easy recognition. |
| Delete | Initiation | The Delete button is applicable only for the Maker screen and that too when the screen is opened from the Task list. In other words, only saved tasks opened in editable mode have delete functionality. |
| Advices | Initiation | The Advices button helps the Maker to generate a pre-advice or acknowledgement to get a confirmation from his customer. |

Table (Cont.) Basic Actions

| Action | Applicable Stages | Description |
|---------------------------|-------------------|--|
| Auto Authorization | Initiation | <p>The auto authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code. The steps to create the Auto authorization as follows:</p> <ol style="list-style-type: none"> 1. Create the fact value as LIFECYCLECODE. 2. Create Rule to enable Auto authorization for any servicing screen and add the expression in Rule for that screen's lifecycle code. 3. While creating a Rule the product processor should be given as LOAN and fact should be selected as LIFECYCLECODE. <p>For example:</p> <ol style="list-style-type: none"> 1. IF (LIFECYCLECODE == LNRDCH) output Section1 LEVEL:0 Create or modify a Rule Group with Name ApprovalRuleGroup and map the Rule(s) created in the step (2). <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • User can define one single Rule for all the screens and add the expression for the life cycle code or user can define individual Rule for each screen and map to the Rule group. • For more information, refer to the Oracle Banking Common Core User Guide to create Fact, Rule and Rule Group. Multi-Level Authorization Initiation Multi-level authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code. • User can define one single Rule for all the screens and add the expression for the life cycle code or user can define individual Rule for each screen and map to the Rule group. <p>Note: For more information, refer to the Oracle Banking Common Core User Guide to create Fact, Rule and Rule Group</p> </div> |

Table (Cont.) Basic Actions

| Action | Applicable Stages | Description |
|----------------------------------|-------------------|--|
| Multi-Level Authorization | Initiation | <p>User can set up multi-level authorization for branch servicing screens by creating a Rule based on life cycle code. The steps to create the Multi-level authorization as follows:</p> <ol style="list-style-type: none"> 1. Create the fact value as LIFECYCLECODE. 2. Create Rule to enable Multi-level authorization for any servicing screen and add the expression in the Rule for the lifecycle code of that screen. 3. While creating a Rule the product processor should be given as LOAN and fact should be selected as LIFECYCLECODE. <p>For Example: IF (LIFECYCLECODE == LNRDCH) output Section1 LEVEL:1~LSR_FA_LNRDCH_AUTH, LEVEL:2~LSR_FA_LNRDCH_AUTH</p> <div data-bbox="922 835 1466 1497"> <p>Note</p> <ul style="list-style-type: none"> • If customer wants to use separate Functional Activity Code for each Level then Rule output need to be define like LVELE:1~<FUNCTIONAL_ACTIVITY_CODE1>, LVELE:2~<FUNCTIONAL_ACTIVITY_CODE2> . Create or modify a Rule Group with name ApprovalRuleGroup and map the rule(s) created in the step (2). • User can define one single rule for all the screens and add the expression for the life cycle code or user can define individual rule for each screen and map to the rule group. • The maker checker validation will be provided if the same maker tries to authorize single or multi-level approval transaction. </div> |

Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at Critical Patches, Security Alerts and Bulletins [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 [Oracle Software Security Assurance](#).

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 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. |

Common Icons

The following are the symbols/icons, which are used frequently in the Oracle Banking Branch application.

Table Symbols











| Symbol | Description |
|---|---|
|  | Add a row in the grid. |
|  | Remove a row in the grid. |
|  | Edit a row in the grid |
|  | Navigate to the next page. |
|  | Navigate to the previous page. |
|  | Navigate to the first page. |
|  | Navigate to the last page. |
|  | Minimize screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen. |
|  | Maximize screen. |
|  | Closes the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes. |

Table Common Icons and their descriptions

| Action | Description |
|---------------|--------------------------------------|
| Submit | Complete the transaction or request. |
| Cancel | Cancel the transaction or request. |

Table (Cont.) Common Icons and their descriptions

| Action | Description |
|-----------|--|
| New | Creates a new record for the selected screen. |
| Query | View all the required information/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. |
| Delete | Remove the configured record for the selected screen. |
| Reopen | Reopens a closed record for the selected screen. |
| Close | Closes the screen. |
| Authorize | Authorize the configured record for the selected screen. |
| Collapse | Minimizes the opened screen to the bottom left corner of the screen. |
| Audit | Check the history of the configured records for the selected screen. |
| Save | Save the configured record for the selected screen. |

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>.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

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 on any related features, refer to the following documents:

- *Oracle Banking Microservices Platform Foundation User Guide*
- *Oracle Banking Common Core User Guide*
- *Routing Hub Configuration User Guide*
- *Oracle Banking Security Management System User Guide*

- *Teller User Guide*
- *Retail 360 User Guide*
- *Retail Onboarding User Guide*
- *Corporate 360 User Guide*
- *Corporate Onboarding User Guide*
- *Small and Medium Business 360 User Guide*
- *Small and Medium Business Onboarding User Guide*
- *Small and Medium Enterprise 360 User Guide*
- *Small and Medium Enterprise Onboarding User Guide*
- *Servicing Configurations User Guide*
- *Current and Savings Account User Guide*
- *Loan Service User Guide*
- *Deposit Services User Guide*
- *Observability User Guide*
- *Troubleshooting Guide*

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.

Icons

The lists of symbols, buttons and shortcut key that are used in the application to perform various tasks are covered in this topic.

Icons

Table **Icons**
















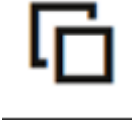









| Icon | Function |
|---|-----------------------------|
|  | Click to minimize a screen. |
|  | Click to maximize a screen. |
|  | Click to close a screen. |
|  | Click to perform a search. |
|  | Click to Open a list. |

Table (Cont.) Icons

| Icon | Function |
|---|--|
|  | Click to add new record. |
|  | Click to navigate to first page. |
|  | Click to navigate to last page. |
|  | Grid View |
|  | List View |
|  | Refresh |
|  | Calendar |
|  | Toggle On |
|  | Toggle Off |
|  | Click to unlock, delete, authorize or view the created record. |
|  | Copy a record |
|  | Click to view the created record. |

| Icon | Function |
|--|-------------------------------|
|  | A user |
|  | Date and time |
|  | Unauthorized or Closed status |
|  | Authorized or Open status |

| Icon | Function |
|---|---------------------|
|  | Open status |
|  | Unauthorized status |
|  | Closed status |

| Icon | Function |
|---|-------------------|
|  | Authorized status |

Module Post-Requisites

After finishing all the requirements, please log out from the Homescreen.

1

Getting Started

You can use this guide as a supplement and read it in conjunction with Common Core, Security Management System, and other application user guides.

This topic contains the following subtopics:

- [Accessing Application](#)
You can access the Oracle Banking Branch application using the link provided by the administrator.

1.1 Accessing Application

You can access the Oracle Banking Branch application using the link provided by the administrator.

This topic contains the following subtopics:

- [Signing In](#)
The Oracle Banking Branch application can be accessed using the link provided by the administrator.
- [Signing Out](#)
You can **Sign Out** from the application using the options provided.

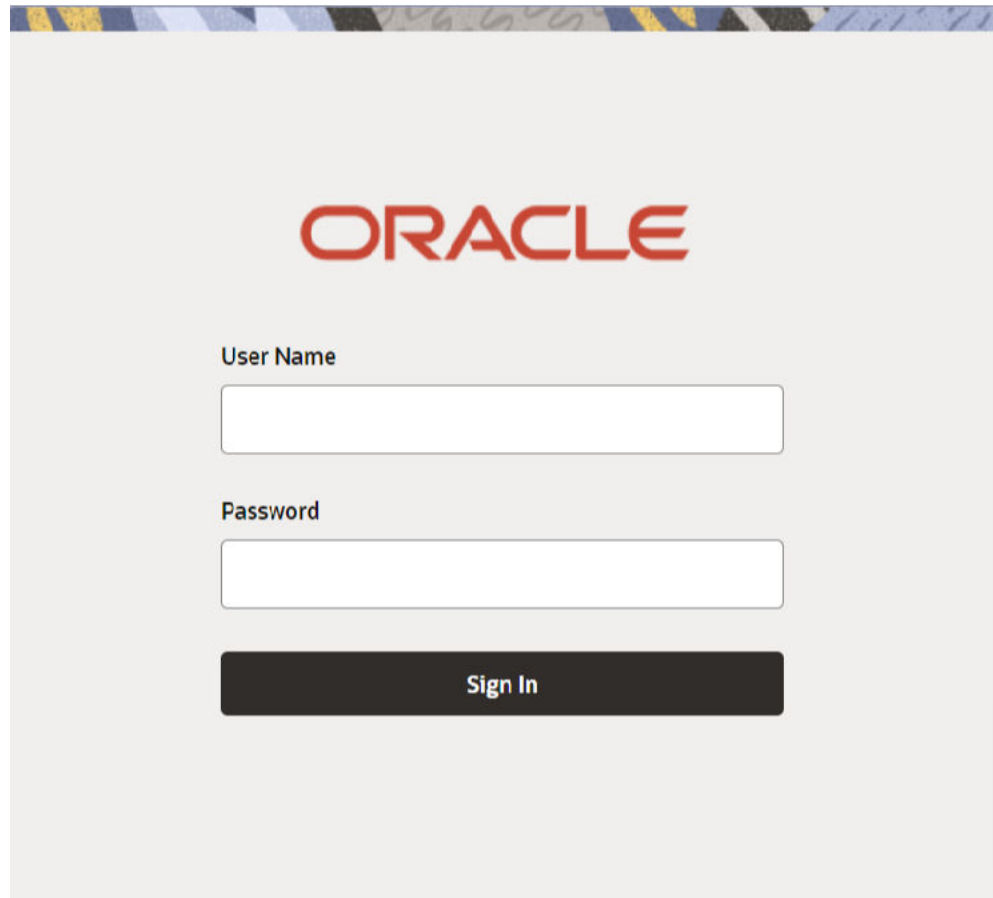
1.1.1 Signing In

The Oracle Banking Branch application can be accessed using the link provided by the administrator.

You can **Sign In** to the application with the credentials provided by the administrator. To sign in to the application, perform the following steps:

1. Enter the URL in the browser address bar, and press **Enter**.

The application login page appears.

Figure 1-1 Login PageThe image shows the Oracle login page. At the top, there is a decorative banner with a blue and yellow pattern. Below the banner, the Oracle logo is displayed in red. Underneath the logo, there are two input fields: one for 'User Name' and one for 'Password'. Below these fields is a dark gray button labeled 'Sign In' in white text.

2. Specify the **User Name** and **Password** provided by the administrator.
3. Click **Sign In** to log in to the application.

The application Home page is displayed.

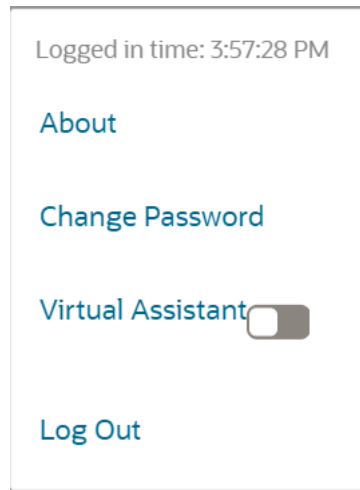
1.1.2 Signing Out

You can **Sign Out** from the application using the options provided.

To sign out of the application, perform the following steps:

1. On the selected application toolbar, click on the user name logged into the application.

The **User Profile fly-out** menu is displayed.

Figure 1-2 Signing Out

2. Click **Log Out** to sign out of the application.

2

Overview of Application Environment

On successful login, the selected application environment appears depending on the user privileges.

The application environment displays the homepage with the necessary menu items. Sample illustrations of the home page and mega menu are shown below:

Figure 2-1 Application Homepage

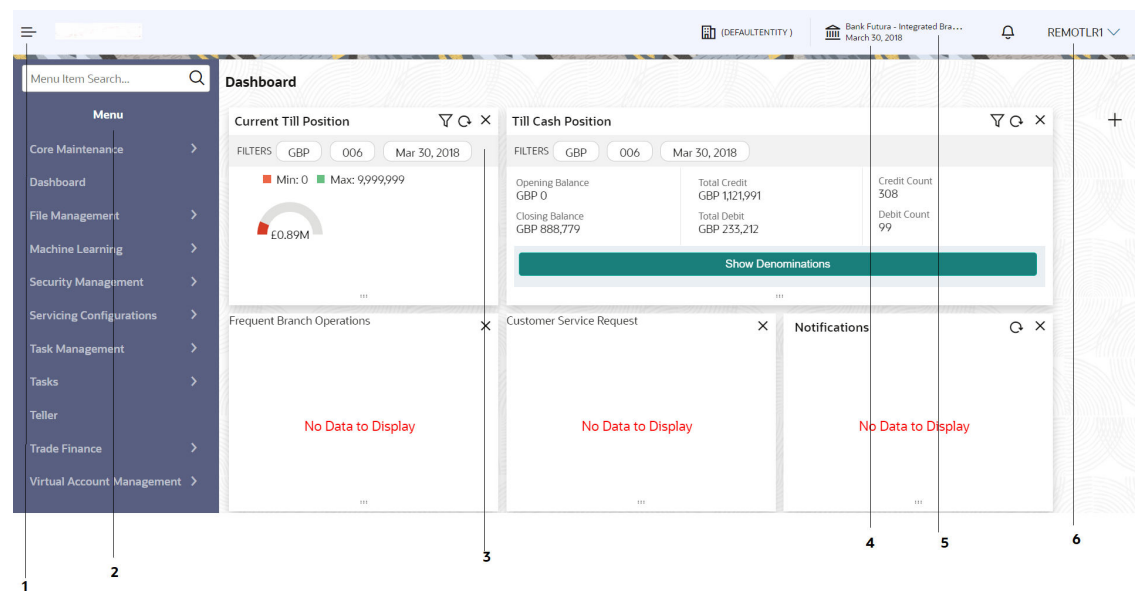
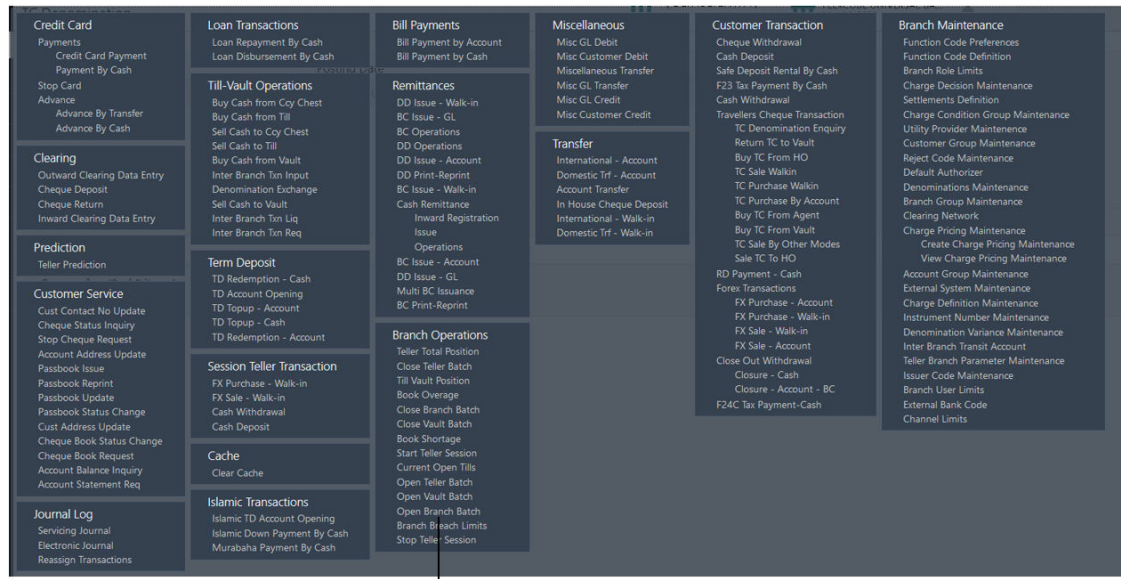


Figure 2-2 Mega Menu



7

For more information on callouts, refer to the callout details table.

Table 2-1 Application Homepage - Callout Details

| Callout | User Interface Term | Description |
|---------|-------------------------|--|
| 1 | | Use to expand/collapse the menu. |
| 2 | | Use to navigate/open the screens associated with the application. |
| 3 | | Displays the screens/dashboards selected using the menu. |
| 4 | Application Date | Displays the application date on which the branch's EOD was last performed. |
| 5 | Bank Name | Displays the name of the bank and its branch code. Click to select the branches associated with the logged-in user. <ul style="list-style-type: none"> Depending on the logged-in user and the branches associated, you can switch between branches and view the records. |
| 6 | | The options and actions related to the user profile are available. |
| 7 | | Use to open the screens associated with the application. |

3

Overview of Screen Environment

Largely, there are several types of screens in the Oracle Banking Branch application. Each type of screen is used to perform certain transactions/operations and to display the details.

This topic contains the following subtopics:

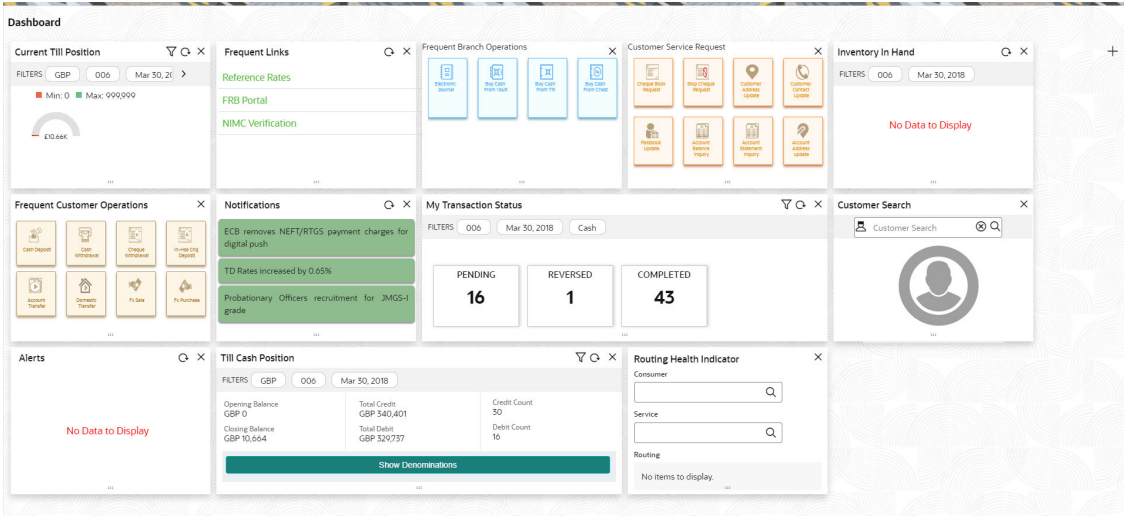
- [About Dashboard](#)
Based on the access/permission provided to the logged-in user, you can view the dashboards associated with the user.
- [About Teller Transaction Screen](#)
Based on the access/permission provided to the logged-in user, you can access a Teller transaction screen.
- [About Servicing Transaction Screen](#)
Based on the access/permission provided to the logged-in user, you can access a Servicing transaction screen.
- [About Summary Screen](#)
Based on the access/permission provided to the logged-in user, you can access a summary screen.
- [About Maintenance Screen](#)
Based on the access/permission provided to the logged-in user, you can access a maintenance screen.
- [About Other Screens](#)
The user can access the screens, which are not categorized under transaction, summary, and maintenance.

3.1 About Dashboard

Based on the access/permission provided to the logged-in user, you can view the dashboards associated with the user.

The dashboard helps the user to analyze the situation and take the necessary actions.

Figure 3-1 Dashboard

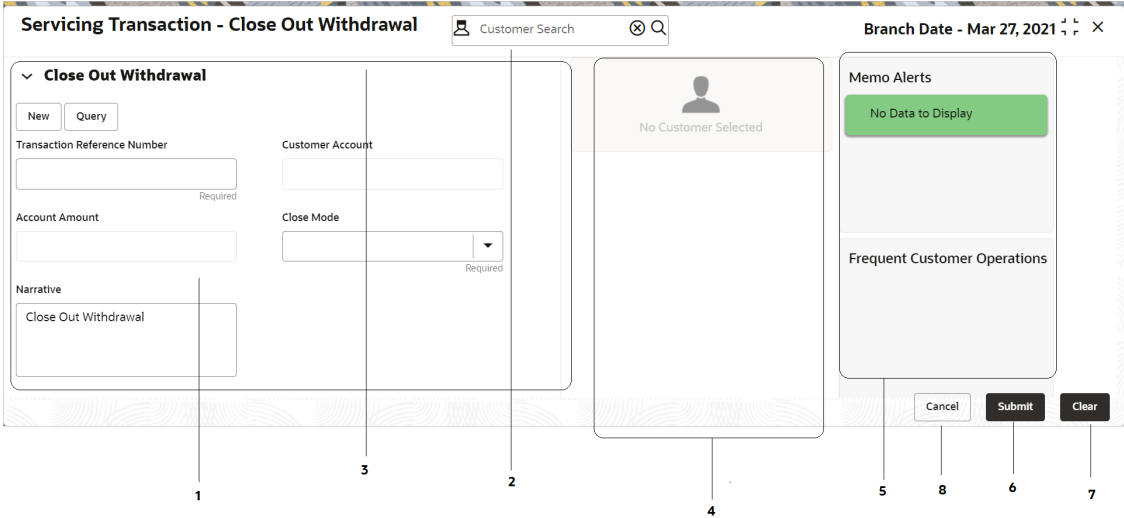


3.2 About Teller Transaction Screen

Based on the access/permission provided to the logged-in user, you can access a Teller transaction screen.

The Teller transaction screen allows you to perform the customer financial transactions; using the fields associated with the selected screen. A sample illustration of a Teller transaction screen is shown below:

Figure 3-2 Teller Transaction Screen



For more information on callouts, refer to the callout details table.

Table 3-1 Teller Transaction Screen-Callout Details

| Callout | User Interface Term | Description |
|---------|------------------------------------|--|
| 1 | Fields and Segments | Displays the fields and segments associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. <div data-bbox="1031 493 1469 856"> <p>Note</p> <p>The user can identify the mandatory field with the Required text. Once the value is captured, the Required text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.</p> </div> |
| 2 | Customer Search | Used to query and find a specific customer account. |
| 3 | Title Bar | Displays the name of the transaction. |
| 4 | Customer Information Widget | Displays the details of account and Customer. |
| 5 | Additional Widgets | Displays the widgets with the additional information necessary for the users. It includes Current Till Position and Frequent Customer Operations. |
| 6 | Submit | Click to submit the transaction with the entered details. |
| 7 | Clear | Click to reset the entered details in the transaction screen. |
| 8 | Cancel | Click to cancel the transaction. |

3.3 About Servicing Transaction Screen

Based on the access/permission provided to the logged-in user, you can access a Servicing transaction screen.

Servicing transaction screen allows you to perform the servicing transactions and customer service transactions; using the fields associated with the selected screen. A sample illustration of a servicing transaction screen is shown below.

Figure 3-3 Servicing Transaction Screen

The screenshot shows the 'Servicing Transaction' screen. At the top, there is a title bar with 'Servicing Transaction' and a 'Customer Search' button. Below this, the screen is divided into several sections. On the left, there is a 'Cheque Status Inquiry' section with fields for 'Account Number', 'Account Name', 'Customer ID', 'Value Date', and 'Beneficiary'. In the center, there are fields for 'Cheque Number', 'Account Branch', 'Cheque Status', and 'Cheque Amount'. On the right, there is a 'Customer Information' section with a 'No Customer Selected' message. At the bottom right, there is an 'Exit' button. Callout numbers 1 through 5 are placed below the screen to identify specific UI elements: 1 points to the central fields, 2 points to the 'Customer Search' button, 3 points to the 'Cheque Status Inquiry' section, 4 points to the 'Customer Information' section, and 5 points to the 'Exit' button.

For more information on callouts, refer to the callout details table.

Table 3-2 Servicing Transaction Screen - Callout Details

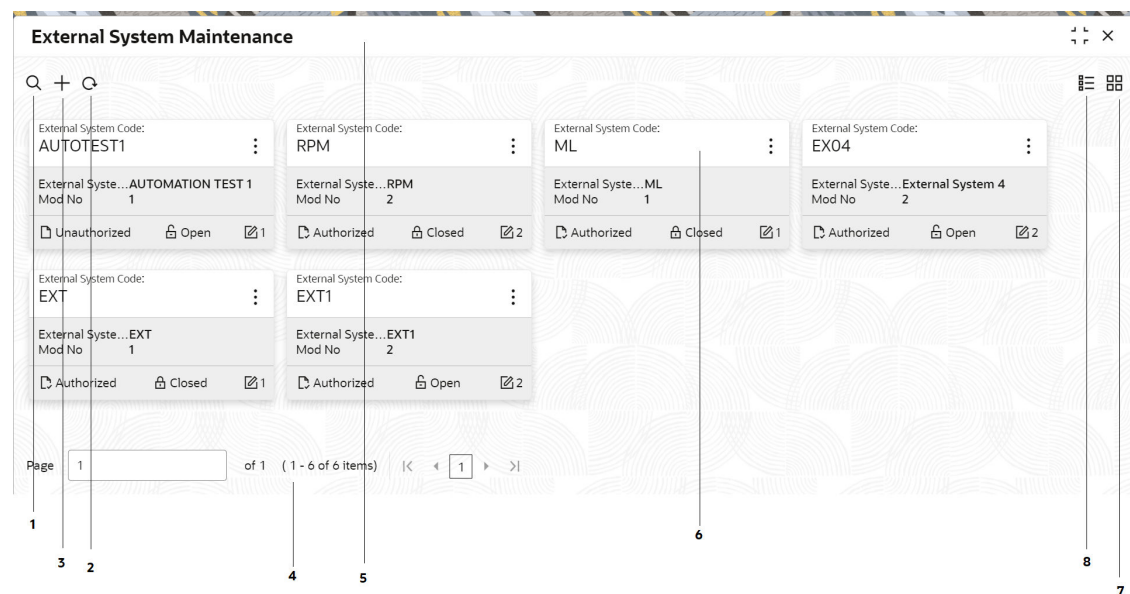
| Callout | User Interface Term | Description |
|---------|-----------------------------|--|
| 1 | Fields | Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. <div> Note The user can identify the mandatory field with the Required text. Once the value is captured, the Required text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom. </div> |
| 2 | Customer Search | Used to query and find a specific customer account. |
| 3 | Title Bar | Displays the name of the transaction. |
| 4 | Customer Information Widget | Displays the details of account and Customer. |
| 5 | Exit | Click to exit from the transaction screen. |

3.4 About Summary Screen

Based on the access/permission provided to the logged-in user, you can access a summary screen.

The summary screen provides information about the configured records; you can perform a few common actions and view the records. A sample illustration of a summary screen is shown below.

Figure 3-4 Summary Screen



For more information on callouts, refer to the callout details table.

Table 3-3 Summary Screen - Callout Details

| Callout | User Interface Term | Description |
|---------|---------------------|---|
| 1 | Search | Click to search/view a record from a selected summary screen. |
| 2 | Refresh | Click to refresh all records configured in the selected summary screen. |
| 3 | Add | Click to create/configure a new record. |
| 4 | Pagination | Displays the number of items available and the page numbers. |
| 5 | Title Bar | Displays the name of the screen and a couple of common actions such as minimize and remove. For more information, see <i>Minimizing Records and Closing Records</i> . |
| 6 | Records | Displays the configured records. You can view the records in a different format. For more information, see <i>View Records</i> . |

Table 3-3 (Cont.) Summary Screen - Callout Details

| Callout | User Interface Term | Description |
|---------|---------------------|---|
| 7 | Tile View | Displays the configured records in the tile format. |
| 8 | List View | Displays the configured records in the list format. |

3.5 About Maintenance Screen

Based on the access/permission provided to the logged-in user, you can access a maintenance screen.

The maintenance screen allows you to create/configure new records; using the fields associated with the selected maintenance screen, you can save a new record. A sample illustration of a maintenance screen is shown below.

Figure 3-5 Maintenance Screen

External System Maintenance

External System Code Required

External System Name Required

| Function Code | On Warning | On Approval | Incoming User Type | Default User | Default Role | External Initiation | Till Update | Authorization Required By Default | Action |
|---------------|------------|-------------|--------------------|--------------|--------------|--------------------------|--------------------------|-----------------------------------|--------|
| | Select One | Select One | User | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

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Cancel Save

1 2 3 4

For more information on callouts, refer to the callout details table.

Table 3-4 Maintenance Screen - Callout Details

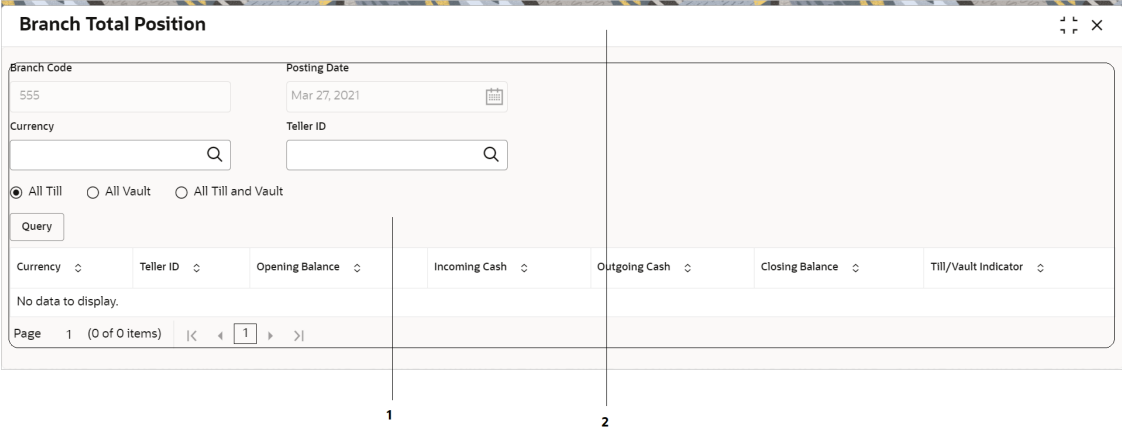
| Callout/Area | User Interface Term | Description |
|--------------|---------------------|--|
| 1 | Fields | <p>Displays the fields associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields.</p> <div> <p>Note</p> <p>The user can identify the mandatory field with the Required text. Once the value is captured, the Required text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.</p> </div> |
| 2 | Title Bar | Displays the name of the screen and a couple of common actions such as minimize and remove. For more information, see Minimize Records and Close Records. |
| 3 | Save | Click to save the entered details on the maintenance screen. |
| 4 | Cancel | Click to reset the entered details on the maintenance screen. |
| 5 | Audit | Click to check the history of the configured records in the maintenance screen. |

3.6 About Other Screens

The user can access the screens, which are not categorized under transaction, summary, and maintenance.

The screens, which are not categorized under transaction, summary, and maintenance, are used to perform certain operations; using the fields associated with the selected screen. A sample illustration of a screen is shown below.

Figure 3-6 Other Screens



For more information on callouts, refer to the callout details table.

Table 3-5 Other Screens - Callout Details

| Callout | User Interface Term | Description |
|---------|---------------------|--|
| 1 | Fields | <div>Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields.</div> <div>Note The user can identify the mandatory field with the Required text. Once the value is captured, the Required text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.</div> |
| 2 | Title Bar | Displays the name of the screen. |

4

How Tos

As a new user, you might require to perform a set of tasks such as transactions, operations, and maintenance that is similar on all the screens.

This topic contains the following subtopics:

- [Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations](#)
You can access the transaction screens based on the permissions/rights provided for the logged-in user.
- [Perform Maintenance](#)
You can access the maintenance screens based on the permissions/rights provided for the logged-in user.
- [Configure Dashboard](#)
You can configure Dashboard to add, remove, or reorder a widget based on the requirements.

4.1 Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations

You can access the transaction screens based on the permissions/rights provided for the logged-in user.

Before you begin, log in to the application homepage. For information on how to log in, refer to [Signing In](#).

To perform the transactions:

1. On the menu (by default, the hamburger menu is expanded), click on the desired menu item. In the Mega Menu, click <name of the screen>, or specify <name of the screen> in the search icon bar.

The screen associated with the menu is displayed.

2. Once the screen is displayed, enter/query the necessary details in the fields and submit the transaction.

There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see *Mandatory and Optional Fields*.

After submitting a transaction, you can perform one of the following actions:

Table 4-1 Description of Transaction Actions



| Action | Description |
|------------------|---|
| Authorize | Used to authorize a transaction. |
| Reject | Used to reject an authorized transaction. |

Table 4-1 (Cont.) Description of Transaction Actions

| Action | Description |
|------------------|----------------------------------|
| Re-submit | Used to re-submit a transaction. |

In addition, the following options are available:

Table 4-2 Description of Common Actions

| Action | Description |
|------------------------|--|
| Minimize Screen | On the selected screen, click the  icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen. |
| Close Screen | On the selected screen, click the  icon to close the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes. |

4.2 Perform Maintenance


You can access the maintenance screens based on the permissions/rights provided for the logged-in user.

Before you begin, log in to the application homepage. For information on how to log in, refer to [Signing In](#).

To perform the maintenance:

1. On the menu (by default, the hamburger menu is expanded), click on the desired menu item.
2. In the Mega Menu, click <name of the screen>, or specify <name of the screen> in the search icon bar.

The screen associated with the menu is displayed.

3. On the summary screen, click the  icon to navigate to the new screen, enter the necessary details in the fields, and create a new record.

There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see *Mandatory and Optional Fields*.

When you are working with records, it is important to remember that the types of records you can create, view, edit, delete, and so on are determined by administrator settings, such as a user profile or permission set. Work with your administrator to ensure you have access to the records and data you need.

- [Common Tasks in Maintenance Screens](#)

You can perform one or more of the common tasks in the maintenance screens based on the requirement.

4.2.1 Common Tasks in Maintenance Screens

You can perform one or more of the common tasks in the maintenance screens based on the requirement.

Now, that you have learned how to work with your records, you might want to explore more advanced features:

- Search Records
- Create/Configure Records
- Copy Records
- Reopen Records
- Print Records
- Minimize Records
- Audit Records
- View Records
- Refresh Records
- Pagination
- Edit Records
- Unlock Records
- Delete Records
- Authorize Records
- Close Records

The common tasks are as follows:

Table 4-3 Common Tasks in Maintenance Screens


| Feature | Description |
|---------------------|---|
| View Records | <p>You 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 in the following topics.</p> <ul style="list-style-type: none">• Tile View - The default summary view of the records is tile view. Displays the configured records in a tile format with a few key fields that are associated with the screen. You can click a tile to open a record on a full screen and view the details. A sample is shown in Figure 4-1.• List View - Displays the configured records in a list format. In the selected screen, click the  icon on the action toolbar as illustrated to view the details. A sample is shown in Figure 4-2. |

Table 4-3 (Cont.) Common Tasks in Maintenance Screens




| Feature | Description |
|---------------------------------|--|
| Search Records | <p>To search for records based on specific criteria:</p> <ol style="list-style-type: none"> 1. On the selected screen, click the  icon. The fields associated with the selected screen displays in a drop-down menu. 2. Specify the required details associated with the selected screen. 3. Click Search to view the requested record. <p>A sample screen for search records is shown in Figure 4-3.</p> |
| Pagination | The number of records is displayed on the bottom left corner of the selected view screen. Depending on the records available, the number of pages appears. You can navigate to the first page, last page, previous page, or next page by using the number icons. |
| Refresh Records | On the selected screen, click the  icon, the records associated with the selected screen are updated with the latest details. |
| Create/Configure Records | <p>To create/configure records in one of the three ways:</p> <ol style="list-style-type: none"> 1. On the selected view screen, click Add to create/configure a record. 2. On the selected view screen, click on a configured record. 3. Click New to create/configure a record. 4. On the menu, select a sub-menu, and click <Create the name of the screen>. |
| Edit Records | <p>To edit a record:</p> <div data-bbox="917 1144 1461 1302"> <p> Note</p> <p>Ensure you have the privileges and know the guidelines to modify the records.</p> </div> <ol style="list-style-type: none"> 1. On the selected screen, click a record and make the required changes to the record. 2. Click Save to save the modified record. |
| Copy Records | <p>To copy a record:</p> <ol style="list-style-type: none"> 1. On the selected screen, click a record. 2. Click Copy to copy the selected record details and make the required changes to the record such as name. 3. Click Save to save the modified record. |
| Unlock Records | <p>To unlock a record:</p> <ol style="list-style-type: none"> 1. On the selected screen, click a record. 2. Click Unlock to unlock the selected record details and make the required changes to the record such as name. 3. Click Save to save the modified record. |

Table 4-3 (Cont.) Common Tasks in Maintenance Screens



| Feature | Description |
|--------------------------|---|
| Reopen Records | <p>To re-open a record:</p> <ol style="list-style-type: none"> 1. On the selected screen, click a record. 2. Click Reopen, a confirmation popup appears. 3. Provide a remark and click Confirm to reopen the record. |
| Delete Records | <p>On the selected screen, select a record and click Delete to remove the record.</p> <div> <p>Note</p> <p>Ensure you have the privileges and know the guidelines to delete the records.</p> </div> |
| Print Records | <p>To print a record:</p> <ol style="list-style-type: none"> 1. On the selected screen, click a record. 2. Click Print to view the record in a print format and print the records. |
| Authorize Records | <p>To authorize a record:</p> <ol style="list-style-type: none"> 1. On the selected screen, click a record. 2. Click Authorize and the records associated with the selected screen that must be authorized appears. 3. Select the required record that must be authorized. 4. Click Approve, and a confirmation popup appears. A sample screen to select an unauthorized record shown in Figure 4-4 5. Provide a remark and click Confirm to authorize the record. A confirmation popup screen to provide a remark is shown in Figure 4-5 |
| Minimize Records | <p>On the selected screen, click the  icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.</p> |
| Close Records | <p>On the selected screen, click the  icon to close the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes.</p> |

Table 4-3 (Cont.) Common Tasks in Maintenance Screens

| Feature | Description |
|---------------|---|
| Audit Records | <p>To audit a record:</p> <ol style="list-style-type: none">On the selected screen, click Audit to view the change history of the record. The audit detail popup is displayed. A sample screen to audit record is shown in Figure 4-6.Click Show History to view the modification history of the record. A sample screen to view the modification history is shown in Figure 4-7Click Back to navigate to the previous screen.Click anywhere on the screen to close the audit detail popup. |

Figure 4-1 Tile View

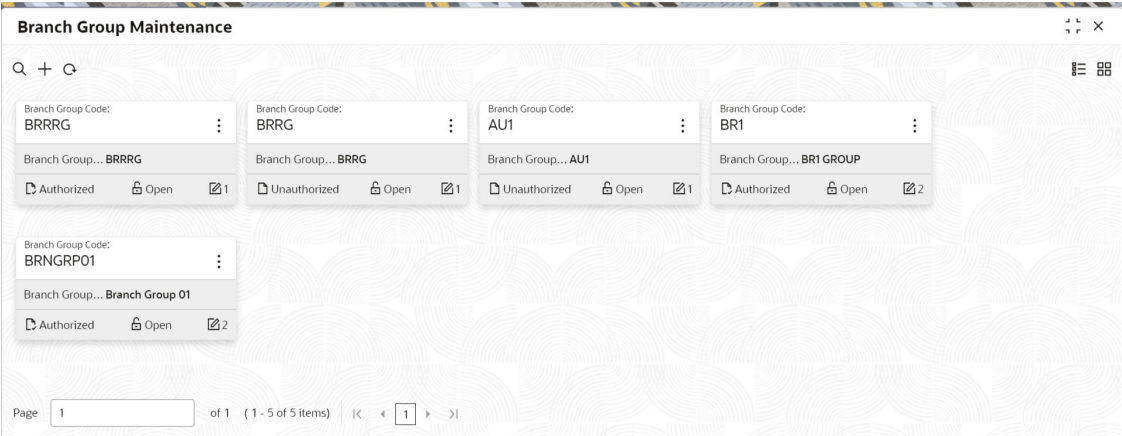


Figure 4-2 List View

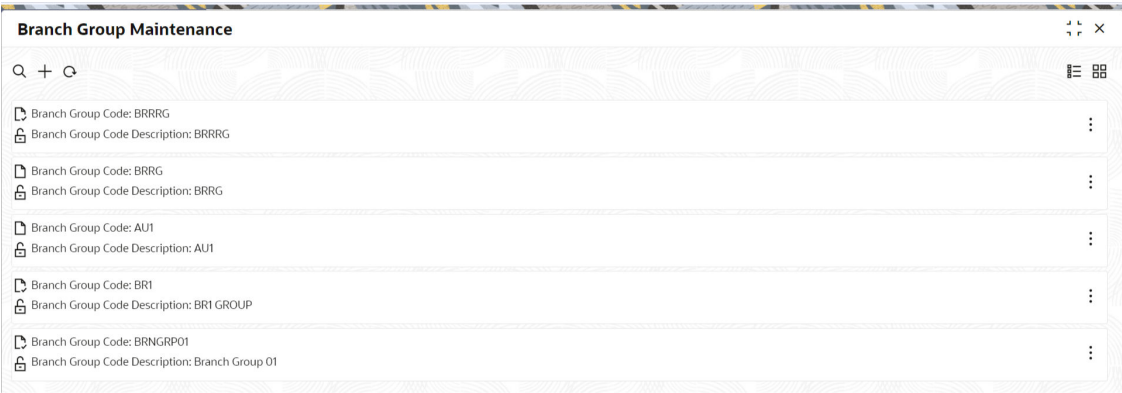
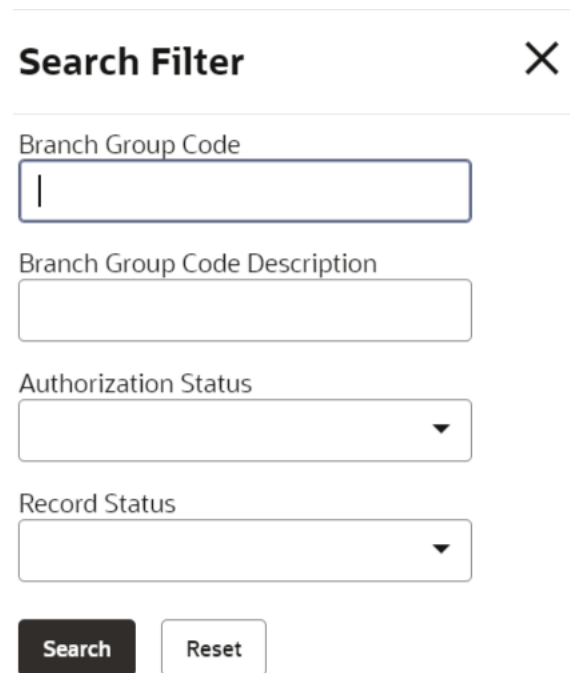
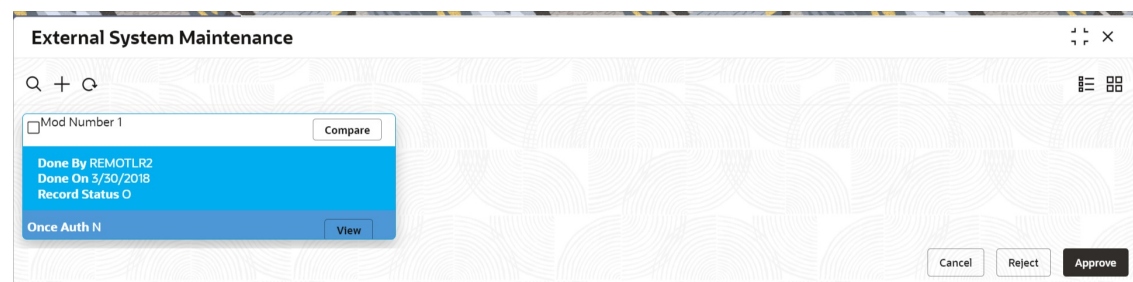


Figure 4-3 Search Records



A search filter dialog box titled "Search Filter" with a close button (X) in the top right corner. It contains four input fields: "Branch Group Code" (a text box with a cursor), "Branch Group Code Description" (a text box), "Authorization Status" (a dropdown menu), and "Record Status" (a dropdown menu). At the bottom are two buttons: "Search" (dark grey) and "Reset" (light grey).

Figure 4-4 Authorize Records



An "External System Maintenance" dialog box with a close button (X) in the top right corner. It features a search bar with a magnifying glass icon and a refresh icon. Below the search bar is a table with one row: "Mod Number 1". To the right of this row is a "Compare" button. The table has a blue header and a blue body. Below the table is a "View" button. At the bottom right are three buttons: "Cancel", "Reject", and "Approve".

Figure 4-5 Confirm Authorization

✕

Confirm

Are you sure you want to approve? Please confirm

Remarks

Cancel

Confirm

Figure 4-6 Audit Records

| Maker | Checker |
|---|---|
| <div><div></div>REMOTLR2</div> | <div><div></div>REMOTLR1</div> |
| <div><div></div>3/30/2018, 3:01:55 PM</div> | <div><div></div>3/30/2018, 7:05:58 AM</div> |
| Status | Modification No |
| <div><div></div>Authorized</div> | 1 |
| <div><div></div>Open</div> | |

Figure 4-7 Modification History

Back

| | | |
|--|--|---|
| Modification No: 2 Authorization Status: Authorized Record Status: Closed | Maker: SWETA Maker Remarks: close Maker Date Time: 3/26/2020, 12:00:00 AM | Checker: SAJOSH Checker Remarks: authorise Checker Date Time: 3/26/2020, 12:00:00 AM |
| Modification No: 1 Authorization Status: Authorized Record Status: Open | Maker: SAJOSH Maker Remarks: - Maker Date Time: 3/26/2020, 12:00:00 AM | Checker: SWETA Checker Remarks: approve Checker Date Time: 3/26/2020, 12:00:00 AM |

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4.3 Configure Dashboard

You can configure Dashboard to add, remove, or reorder a widget based on the requirements.

- To configure a tile, perform the following steps:

1. On the Dashboard, click **Configure Tile**.
The **Configure Dashboard Tile popup** page appears.
2. Select one of the following options:
Allow the user to...

Table 4-4 Options and their Descriptions

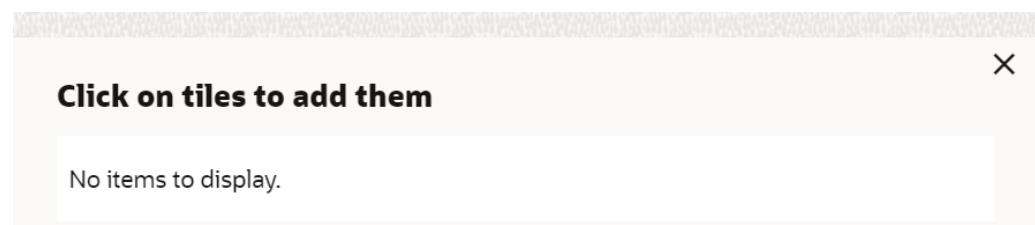
| Option | Description |
|----------------------------------|--|
| Insert or Remove the tile | If selected, you can remove the dashboard widget from the dashboard-landing page. |
| Reorder the tile | If selected, you can rearrange the dashboard widget on the dashboard-landing page. |

Put the tile into other states:

Table 4-5 Tile States and their Descriptions

| State | Description |
|--|--|
| Flipped | If selected, you can flip the dashboard widget for more information. |
| Expanded | If selected, you can expand the dashboard widget on the Dashboard landing page. |
| Flipped and Expanded at the same time | If selected, you can flip and expand the dashboard widget on the Dashboard landing page. |

3. Click **Close** to update the dashboard widget configuration.
 - To remove the dashboard widget from the landing page, click the **Remove** icon.
The removed widgets are available under the Add Tiles option.
 - To drop the dashboard widget at the desired place, select and drag the **Drag to Reorder** icon.
The page is automatically refreshed and displays the updated order.
 - To view all the information on the dashboard widget, click **Expand Tile**.
The expanded widget appears on a complete row to view more information.
 - To add a tile, perform the following steps:
 1. Click **Add Tiles to Dashboard** to add more available Dashboard widgets to the dashboard-landing page.
The **Click on tiles to add them** popup screen appears.

Figure 4-8 Add Tiles

2. Click on the dashboard to add to the dashboard-landing page.

The page is automatically refreshed and displays the added dashboard widget.

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