

Oracle® Banking Collections

Getting Started User Guide



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ORACLE®

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Preface

This guide helps user to get started with Oracle Banking Collections application. It describes the basic design of the application and the common operations that user can perform while using the application. The guide must be used as a supplement and read in conjunction with *Oracle Banking Common Core User Guide*, *Oracle Banking Security Management System User Guide*, and other application user guides.

- [Purpose](#)
- [Pre-Requisite](#)
- [Audience](#)
- [Acronyms and Abbreviations](#)
- [Basic Actions](#)
- [Conventions](#)
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- [Documentation Accessibility](#)
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- [Diversity and Inclusion](#)
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- [Post-Requisite](#)

Purpose

This guide is designed to help acquaint with the Getting Started User Guide application. This guide provides answers to specific features and procedures that the user need to be aware of the module to function successfully.

Pre-Requisite

Specify User Id and Password, and Login to the Home screen.

Audience

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

Acronyms and Abbreviations

The list of the acronyms and abbreviations that are used in this guide are as follows:

Table 1 Acronyms and Abbreviations

Abbreviation	Description
DDA	Demand Deposit Accounts
ECA	External Credit Approval
EOD	End of Day
IBAN	International Bank Account Number

Basic Actions

The basic actions performed in the screens are as follows:

Table 2 Basic Actions

Actions	Description
New	Click New to add a new record. The system displays a new record to specify the required data. The fields marked with asterisk are mandatory. <ul style="list-style-type: none"> This button is displayed only for the records that are already created.
Save	Click Save to save the details entered or selected in the screen.
Unlock	Click Unlock to update the details of an existing record. The system displays an existing record in editable mode. <ul style="list-style-type: none"> This button is displayed only for the records that are already created.
Authorize	Click Authorize to authorize the record created. A maker of the screen is not allowed to authorize the same. Only a checker can authorize a record. <ul style="list-style-type: none"> This button is displayed only for the already created records. For more information on the process, refer Authorization Process.
Approve	Click Approve to approve the initiated record. <ul style="list-style-type: none"> This button is displayed once the user click Authorize.
Audit	Click Audit to view the maker details, checker details of the particular record. <ul style="list-style-type: none"> This button is displayed only for the records that are already created.
Close	Click Close to close a record. This action is available only when a record is created.
Confirm	Click Confirm to confirm the action performed.
Cancel	Click Cancel to cancel the action performed.
Compare	Click Compare to view the comparison through the field values of old record and the current record. <ul style="list-style-type: none"> This button is displayed in the widget once the user click Authorize.
View	Click View to view the details in a particular modification stage. <ul style="list-style-type: none"> This button is displayed in the widget once the user click Authorize.
View Difference only	Click View Difference only to view a comparison through the field element values of old record and the current record, which has undergone changes. <ul style="list-style-type: none"> This button is displayed once the user click Compare.
Expand All	Click Expand All to expand and view all the details in the sections. <ul style="list-style-type: none"> This button is displayed once the user click Compare.

Table 2 (Cont.) Basic Actions

Actions	Description
Collapse All	Click Collapse All to hide the details in the sections. <ul style="list-style-type: none">This button is displayed once the user click Compare.
OK	Click OK to confirm the details in the screen.

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.

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](#). All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

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 customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if user are hearing impaired.

Related Resources

For more information, refer these related user guides:

- *Oracle Banking Common Core User Guide*
- *Oracle Banking Security Management System User 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.

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.

Icons

This guide has the following list of Icons.

Table 3 Icons - Common










Icon	Function
	Minimize
	Maximize
	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

Table 3 (Cont.) Icons - Common









Icon	Function
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts

Table 4 Icons – Audit Details





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

Table 4 (Cont.) Icons – Audit Details








Icon	Function
	Rejected status

Table 5 Icons - Widget

Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status
	Rejected status
	Modification Number

Post-Requisite

After finishing all the requirements, please log out from the Home screen.

1

Access Application

This topic describes the information about Access Application.

User can access the application using the link provided by the administrator. Please contact the administrator for URL and login credentials.

Note

For more information on Users and Roles, refer *Oracle Banking Security Management System User Guide*.

- [Sign In to the Application](#)
This topic describes the information about Sign In to the Application.
- [Sign Out of the Application](#)
This topic describes the information about Sign Out of the Application.
- [Chang Your Password](#)

1.1 Sign In to the Application

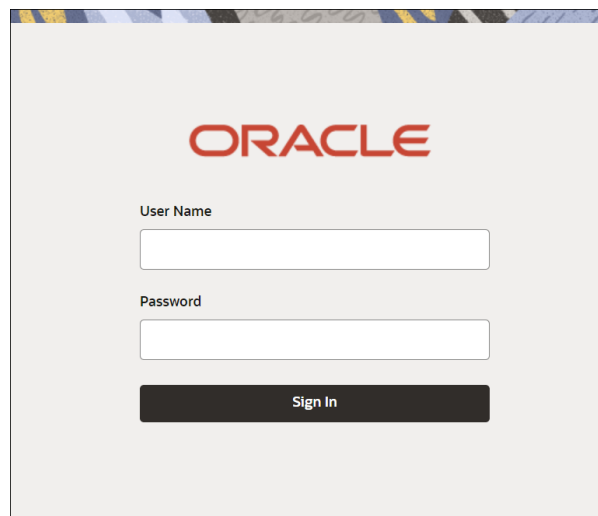
This topic describes the information about Sign In to the Application.

User can sign in to the application using user name and password.

To sign in to the application:

1. Open the application in a web browser.
The application login page appears.

Figure 1-1 Sign In

The image shows the Oracle Sign In page. At the top, there is a decorative header with a pattern of blue, yellow, and grey. Below the header, 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 grey button with the text 'Sign In' in white.

2. In the **User Name** field, enter user ID.
3. In the **Password** field, enter password.
4. Click **Sign In**.

After user sign in, the landing page and menus appear, which may vary for each user depending on the access rights provided by the administrator.

1.2 Sign Out of the Application

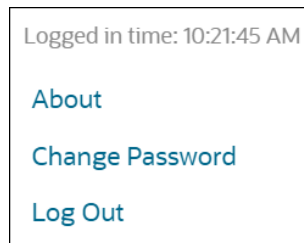
This topic describes the information about Sign Out of the Application.

User need to sign out of the application once user finish the work. Before user sign out, ensure that user have saved details on any pages user were working on.

To sign out of the application:

1. In the top right corner, click the <User Name> menu.

Figure 1-2 Sign Out



2. Click **Log Out**.

1.3 Chang Your Password

User can change password periodically.

To change password:

1. In the top right corner, click the <User Name> menu.
2. In the <User Name> menu, click **Change Password**.
3. In the **Change Password** section, enter your current password in the **Current Password** field.
4. In the **New Password** field, enter new password.
5. In the **Confirm Password** field, enter new password again to confirm.
6. Click **Confirm**.

2

User Interface of the Application

The application has a convenient and customizable user interface. Upon successful login, the application interface appears depending on the user privileges assigned to user role.

The following topics describe the various user interface elements of the application and their usage:

- [Dashboard](#)
This topic describes the information about Dashboards.
- [Central Workspace](#)
This topic describes the information about Central Workspace.
- [Page Interface](#)
This topic describes the information about Page Interface.
- [User Interface Elements](#)
This topic describes the information about User Interface Elements.

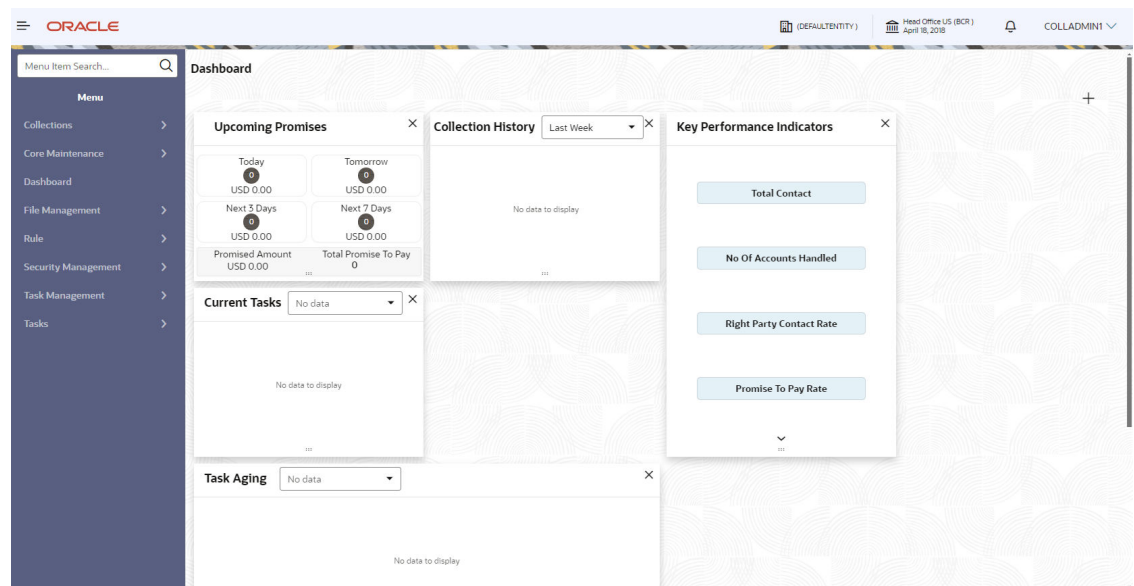
2.1 Dashboard

This topic describes the information about Dashboards.



This area contains the elements commonly used to navigate the application and configure user-specific settings.

The following figure depicts the global area of the application:

Figure 2-1 Dashboard




Menu

Based on user role, the menu displays the pages grouped as per their respective modules. Click  to open the menu and click the desired menu item to navigate to a page. By default, the menu is open when user login. If user want to quickly search for a menu item, enter the name of the menu in the Menu Item Search box and click .

Branch Entity

The branch entity refers to the entity for which the logged-in user performs transactions or maintains details. By default, branch entity associated with the logged-in user is displayed. If you want to switch entity, user can search and select another branch entity.


To switch to other branch entity:

1. Click .
2. In the **Switch Entity** section, enter entity ID in the **Entity ID** field.
3. In the **Entity Name** field, enter the entity name.
4. Click **Fetch**.
5. Click to select the required entity.


Branch Details

Displays the branch of the logged-in user and the branch posting date. If user want to change the branch, user can search and select another branch.

To switch to other branch:

1. Click .
2. In the **Select Branch** section, enter branch code in the **Branch Code** field.
3. In the **Branch Name** field, enter the branch name.
4. Click **Fetch**.
5. Click to select the required branch.

Alerts

If you click , user can view details of the alerts.

User Name Menu

The user name of the logged in user is displayed at the top right corner of the page. If user expand the <User Name> menu, it displays the following:

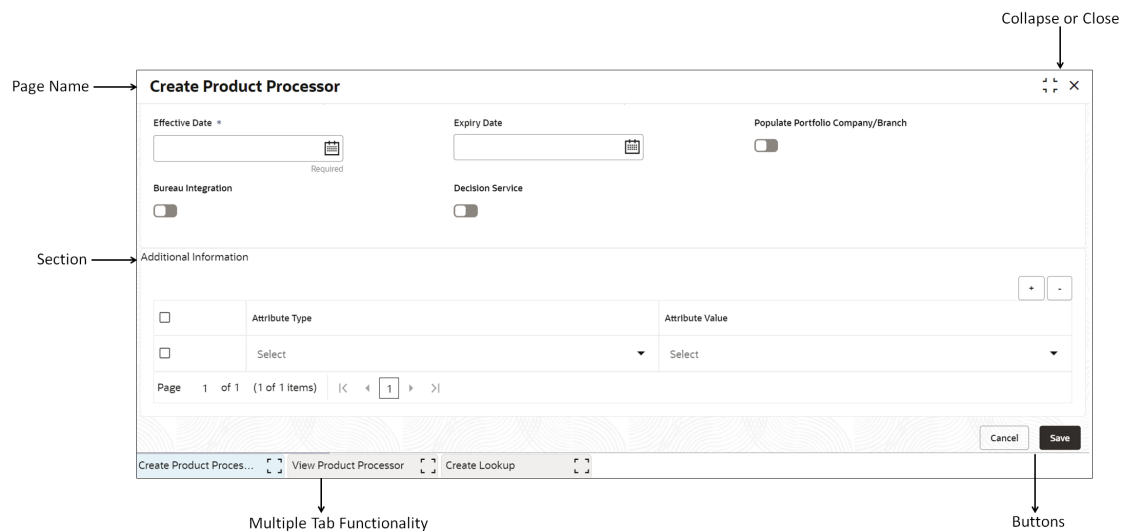
- **Logged in time:** The time when the user logged into the application.
- **About:** Click to view the copyright details of the application.
- **Change Password:** Click to change user password used for signing in the application. For more information, refer [Chang Your Password](#).
- **Log Out:** Click to sign out of the application. For more information, refer [Sign Out of the Application](#).

2.2 Central Workspace

This topic describes the information about Central Workspace.

The central workspace constitutes the area where user perform transactions and other tasks in the application page.

The following figure highlights the common elements that constitute the central workspace.

**Page Name**

This is the name of the application page that user have opened or accessed.

Section

Certain pages contain a number of sections which are used to logically group the details or fields on that page.

Collapse or Close page

The application provides options on each page to either collapse a page or close a page. The collapse option helps user keep a page open for easy reference while user work on the other pages.

Multiple-Tabs Functionality

The application offers a unique multiple-tabs functionality that enables user to access multiple pages simultaneously. The tabs display the name of the pages for easy identification.

Note

For more information on user interface for different page types, refer [Page Interface](#). For information on the various user interface elements, such as icons and buttons that are used across the application, refer [User Interface Elements](#).

2.3 Page Interface

This topic describes the information about Page Interface.

The application displays various components on a page depending on the type of page.

The application primarily consists of following types of pages:

- [Maintenance Page](#)
This topic describes the information about Maintenance Page.
- [Transaction Page](#)
This topic describes the information about Transaction Page.

2.3.1 Maintenance Page

This topic describes the information about Maintenance Page.

The maintenance pages facilitate user to create and manage the records for different type of data that are used across the application for performing various transactions. For example, user can configure lookups, product processors, and country codes.

A maintenance page consist of following two types of pages:

- [Create Page](#)
- [View Page](#)

2.3.1.1 Create Page

The create pages facilitate you to create a record. You can create a record by specifying only the mandatory details initially and later modify a record to add any additional details, if required.

The following figure depicts the user interface of a typical create page.

Figure 2-2 Create page

Create Lookup

Basic Details

Type Required Description Required System Defined No

Lookup Codes

<input type="checkbox"/>	Code	Description	Sort	System Defined	Sub Code 1	Sub Code 2	Enabled
No data to display.							

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

Cancel Save

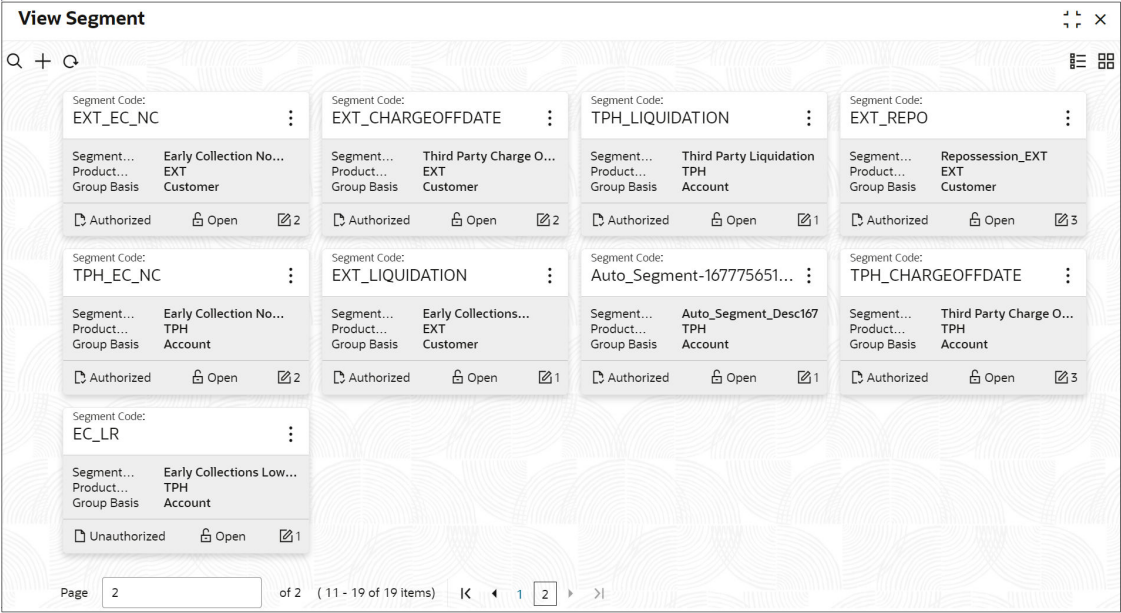
2.3.1.2 View Page

The view pages facilitate you to view the list of records that are created using the create page. You can search for records with specific search criteria and also perform various actions on a record.

By default, the page displays the records in tile view. You click and to view the records in list view or tile view, respectively.

The following figure depicts the user interface of a typical view page displaying records in tile view.

Figure 2-3 View Page Displaying Records in Tile View




The following figure depicts the user interface of a typical view page displaying records in list view.

Figure 2-4 View Page Displaying Records in List View

Segment Code	Segment Description	Group Basis	Product Processor
EXT_EC_NC	Early Collection No Contact EXT	Customer	EXT
EXT_CHARGEOFFDATE	Third Party Charge Off Date	Customer	EXT
TPH_LIQUIDATION	Third Party Liquidation	Account	TPH
EXT_REPO	Repossession_EXT	Customer	EXT
TPH_EC_NC	Early Collection No Contact TPH	Account	TPH
EXT_LIQUIDATION	Early Collections Liquidation	Customer	EXT
Auto_Segment-1677756510399	Auto_Segment_Desc1677756510399	Account	TPH
TPH_CHARGEOFFDATE	Third Party Charge Off Date	Account	TPH
EC_LR	Early Collections Low Risk Segment	Account	TPH

Page 2 of 2 (11 - 19 of 19 items) | K ◀ 1 2 ▶ >|

If you click  for a record, the options available for performing action on a record are displayed. However, the options available for a record are dependent on privileges assigned to your user role.

A record displays the following possible options for a record:

- **Unlock:** Option to modify a record.
- **Delete:** Option to delete an unauthorized record.
- **Close:** Option to close an authorized record.
- **Reopen:** Option to reopen a record.
- **Authorize:** Option to authorize a record.
- **Copy:** Option to copy a record.
- **View:** Option to view details of a record in read-only mode.

For more information on how to perform actions on a record using these options, see [Standard Procedures](#).

2.3.2 Transaction Page

This topic describes the information about Transaction Page.


The transaction pages facilitate user to perform various transactions related to the tasks that user need to work on.

2.4 User Interface Elements

This topic describes the information about User Interface Elements.

The user interface elements used in the application are as described below.

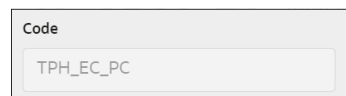
List

A list displays values configured in the application from which user can select the desired value. For example, to select a supervisory group code, click  in the Supervisory Group field.

A screenshot of a user interface element labeled 'Supervisory Group'. It consists of a rectangular text input field with a light gray border. To the right of the input field, there is a small magnifying glass icon inside a circle.

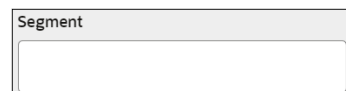
Display Field

A display field displays information in read-only mode and user cannot edit the same.

A screenshot of a user interface element labeled 'Code'. It is a rectangular display field with a light gray border, containing the text 'TPH_EC_PC'.

Entry Fields

An entry field is an element in which user can type or enter information. This information can be textual, numeric, or alphanumeric in nature.

A screenshot of a user interface element labeled 'Segment'. It is a rectangular text input field with a light gray border.

Note

Fields marked as **Required** are mandatory.

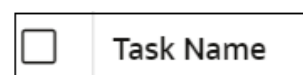
Option Button

An option button provides choices that are mutually exclusive. User can select only one choice from the given options.

A screenshot of two radio button options. The first option is 'Use Existing Rule' with a selected radio button (filled circle). The second option is 'Create New Rule' with an unselected radio button (empty circle).

Check Box

A check box indicates whether a condition is enabled or disabled. It also indicates selection of items. If multiple check boxes are presented, User can select one or more of them.

A screenshot of a check box and a label. On the left is an unchecked square check box. To its right is the text 'Task Name'.

List Box

A list box displays a fixed list of available options. If there are more options than what can be displayed at a given time, a scroll bar appears in the list box. User can select only one option from the given list.

Record Status

▼

Open
Closed

Multiple-Selection Box Field

A Multiple-Selection List field allows you to select multiple options for a field from a list of values.

Collection Status

Bankruptcy ×

Customer Not Available ×

Pagination

The pagination feature helps user to search for required record from the search results.

Page 2 of 5 (11 - 20 of 49 items) |< ◀ 1 2 3 4 5 ▶ >|

Table

A table displays list of records in row and column format.

<input type="checkbox"/>	S. No.	Current Status	Next Status	Type	Active
	1	Open	SMS SENT	System	<input checked="" type="checkbox"/>
	2	SMS SENT	SMS SUCCESSFUL	System	<input checked="" type="checkbox"/>
	3	SMS SENT	SMS FAILED	System	<input checked="" type="checkbox"/>
	4	SMS SUCCESSFUL	Closed	System	<input checked="" type="checkbox"/>

Date Field

The date field helps user to set the date. User can either enter the date manually or select it using the calendar.

To select a date from the calendar:

1. Click to select a date.
The calendar appears with the current month and year in context with calendar date highlighted by default.

Note

If user want to view all the months for a year and select the required month, click the <month name> in context. If user want to view list of years and select the required year, click the <year> in context. User can click < and > to navigate back and forth, respectively.

2. Select the relevant date.
The selected date gets populated in the date field.

Audit

All the maintenance pages provide an option to view the audit details of a record. The following details are displayed if user click **Audit** in maintenance pages.

Table 2-1 Field Description: Audit

Field Name	Description
Modification No	Displays the modification number of the record.
Authorization Status	Displays the authorization status of the record.
Record Status	Displays the status of the record.
Maker	Displays the user name of the maker who modified the record.
Maker Remarks	Displays the remarks given by the maker on modification of the record.
Checker	Displays the user name of the checker who modified the record.
Checker Remarks	Displays the remarks given by the checker on authorization of the record.

Buttons and Icons

The following table lists the buttons that are used in the application.

Table 2-2 Buttons

Click	To
Save	Save the details.
Cancel	Cancel an operation.
Search	View the search results on a page based on specified search criteria.
Reset	Reset a page.
Clear	Clear the search parameters entered.
Audit	View audit details of the record.

The following table lists the icons that are used in the application.

Table 2-3 Icons


















Click	To
	View sub menus.
	Expand a section.
	Collapse a page
	Maximize a page.
	Close a page.
	View expanded section of a widget.
	Create a record.
	View calendar and select date.
	Add a row in a table.
	Delete a row.
	View actions available for a record.
	Search records.
	Toggle to turn on the switch.
	Toggle to turn off the switch.

Table 2-3 (Cont.) Icons

Click	To
	View records in list view.
	View records in tile view.
	Expand a row in a table to view additional details.

3

Common Concepts

This topic describes the information about Common Concepts.

The application provides the following features using which user can efficiently manage and control the day to day work in bank.

- [User Role Based Access](#)
This topic describes the information about User Role Based Access.
- [Maker Checker](#)
This topic describes the information about Maker Checker.

3.1 User Role Based Access

This topic describes the information about User Role Based Access.

The application supports role based access which facilitates user to provide access right to pages and the tasks based on user role. This means user can allow or restrict the users to view and perform tasks on the pages based on the user role assigned.

Note

For more information, refer *Oracle Banking Security Management System User Guide*.

3.2 Maker Checker

This topic describes the information about Maker Checker.

The Maker Checker functionality facilitates in two level authorization for any actions related to the records that are created in the application.

This means the records created by a maker are applicable once they are authorized by the checker. Similarly, if a record is modified, closed, or reopened, it needs to be authorized by the checker.

4

Standard Procedures

This topic describes the information about Standard Procedures.

In the application, there are maintenance pages which help user to configure and maintain various records. User can create records and perform various actions on the same, such as copy, reopen, and authorize a record. The procedure to perform these actions is similar across all maintenance pages.

Note

The actions that you can perform on a record are available based on the user privilege rights provided by the administrator for your user role.

The following topics describe how to perform various actions on a record:


- [Modify a Record](#)
This topic describes the information about Modify a Record.
- [Delete a Record](#)
This topic describes the information about Delete a Record.
- [Close a Record](#)
- [Reopen a Record](#)
This topic describes the information about Reopen a Record.
- [Authorize a Record](#)
This topic describes the information about Authorize a Record.
- [Copy a Record](#)
- [View Details of a Record](#)

4.1 Modify a Record

This topic describes the information about Modify a Record.

User can modify details of a record, if required. However, only the maker can modify a record before the first authorization. Once the first authorization is done, the record can be modified by any other user.

To modify details of a record:

1. Navigate to the view page and click  for the record that you want to modify.
2. Click **Unlock**.
3. Modify the required details.
4. Click **Save**.


Once User modify a record, it must be authorized to be effective in the system.

4.2 Delete a Record

This topic describes the information about Delete a Record.

A newly created record that is not yet authorized can be deleted from the system. This means, user can delete a record with **Once Authorized** status as **N**. However, only the maker of the record can delete it.

To delete a record:

1. Navigate to the view page and click  for the record that user want to delete.
2. Click **Delete**.

A message appears prompting user to either proceed with the operation or view details of the record before proceeding to delete the record.


3. If user want to view details of the record before deleting, click **View**.
4. Click **Proceed** to delete the record.
5. In the **Remarks** field, enter remarks for deleting the record.
6. Click **Confirm**.

A message appears that the record is deleted successfully.

4.3 Close a Record

Once a record is authorized upon creation, user cannot delete it from the system. However, user can close an authorized record if user want to deactivate it

To close a record:

1. Navigate to the view page and click  for the record that user want to close.
2. Click **Close**.

A message appears prompting user to either proceed with the operation or view the details of the record before proceeding to close the record.

3. Click **Confirm** to close the record.
4. In the **Remarks** field, enter remarks for closing the record.
5. Click **Confirm**.


Once user close the record, it needs to be authorized to be effective in the system.

4.4 Reopen a Record

This topic describes the information about Reopen a Record.

User can reopen a closed record to activate it again. A record is effective in the system only if it is in **Open** status.

To reopen a record:

1. Navigate to the view page and click  for the record that user want to reopen.
2. Click **Reopen**.

A confirmation pop up appears.

3. In the **Remarks** field, enter remarks for reopening the record.
4. Click **Confirm**.

A message appears that the record is reopened successfully.


Once user reopen a record, it needs to be authorized to be effective in the system.

4.5 Authorize a Record

This topic describes the information about Authorize a Record.

Once a record is created, you need to authorize it. Similarly, if a record is modified, closed, reopened, or a new record is created by copying an existing record, user need to authorize it.

To authorize a record:

1. Navigate to the view page and click  for the record that user want to authorize.
2. Click **Authorize**.
3. Select the **Mod Number** check box of the record that user want to authorize and then click **Confirm**.

Note:

- If there more than one modification records that need to be authorized, user can select any record for authorization. However, if user select the last modification record for authorization, all the previous modification records are selected by default for authorization. The details of the last modified record is effective in the system.
- Before authorization, if user want to:
 - View the comparison of the record with the latest authorized record, select the **Mod Number** of the required record and click **Compare**.
 - View detailed information of record, select the **Mod Number** of the required record and click **View**.


4. In the **Remarks** field, enter remarks for authorizing the record.
5. Click **Confirm**.

Once user authorize a record, the action performed by the maker is applicable in the system.

4.6 Copy a Record

User can make a copy of an existing record to create a new record with similar details. Once the details of an existing record are copied, user can enter the mandatory details and modify the copied details as per requirement.

To copy an existing record to create a new record:

1. Navigate to the view page and click  for the record that user want to copy.
2. Click **Copy**.

The create page appears with details copied from the existing record.


3. Enter the required details.
4. Click **Save**.

Once the record is created, it needs to be authorized to be effective in the system.

4.7 View Details of a Record

User can view the details of a record in read-only mode.

To view details of a record:

1. Navigate to the view page and click  for the record that user want to view.
2. Click **View**.
The view page displays details of the record in read-only mode.
3. Click **Audit** if user want to view the audit trail details of the record.

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