

Oracle® Banking Corporate Lending Cloud Service

Getting Started User Guide



Release 14.8.2.0.0

G53441-03

April 2026

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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Preface

This topic contains following sub-topics:

- [Purpose](#)
- [Audience](#)
- [Conventions](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Screenshot Disclaimer](#)

Purpose

This manual is designed to help you quickly get acquainted with the getting started of Oracle Banking Corporate Lending Cloud Service 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 must be read in conjunction with Common Core, Security Management System, and other application user guides.

Audience

This manual is intended for the following User/User Roles:

- Customer Service Representatives (CSRs)
- Staff in charge of setting up new products in a bank

Conventions

The following text conventions are used in this document:

Table 1 Conventions

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.

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, you can refer to the following documents:

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

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](#)
- [Add to an Existing Oracle Cloud Account](#)
- [Access the Cloud Account](#)
- [Create Co-Administrator Users](#)
- [Subscribe to a Disaster Recovery Infrastructure Region](#)
- [Create an Environment](#)
- [Access Oracle Identity and Access Management](#)
- [Activate Application User 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

- 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>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.

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

Field	Description
Confirm Password	Specify the confirm password. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note</p> <p>Both Password and Confirm Password must be matched.</p> </div>
Tenancy Name	Specify the tenancy name to be associated with the cloud account. <div style="border: 1px solid #ccc; padding: 5px; 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	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. <div style="border: 1px solid #ccc; padding: 5px; 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.

2.3 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.

2.4 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.

2.5 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.

2.6 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](#).

2.7 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.

2.8 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, 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.

2.9 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.

3

Getting Started

This topic describes an overview on the Oracle Banking Corporate Lending Cloud Service application and explains basic design of Oracle and the common operations that can follow while using it.

This section contains the following subtopics:

- [Application Access](#)
This topic provides the information about the Application Access for Oracle Banking Corporate Lending Cloud Service.
- [Application Environment](#)
This topic describes about the various fields available in the application environment.
- [How to's](#)
This topic describes about the different types of actions that the user can perform in the application.
- [Screen / Dashboard](#)
This topic describes about the various components in screen / dashboard.
- [Icons](#)
- [Basic Actions](#)
- [Common Buttons](#)
This topic describes the information about all the common buttons used in the application.
- [Common Fields](#)
This topic describes the information about all the common fields used in the application.

3.1 Application Access

This topic provides the information about the Application Access for Oracle Banking Corporate Lending Cloud Service.

The user can access any application using the link provided by the administrator. Contact the administrator for URL and the login credentials. For more information on Users and Roles, refer to **Oracle Banking Security Management System User Guide**.

This topic contains the following subtopics:

- [Sign In](#)
This topic describes the systematic instructions to Sign In to the application.
- [Sign Out](#)
This topic describes the systematic instructions to Sign Out from the application.

3.1.1 Sign In

This topic describes the systematic instructions 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 3-1 Sign In

The screenshot shows the Oracle Sign In interface. At the top, the Oracle logo is displayed in red. Below the logo, there are two text input fields. The first is labeled 'User Name' and the second is labeled 'Password'. Below these fields is a dark grey button with the text 'Sign In' in white.

2. Specify **User Name** and **Password**.

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

Table 3-1 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.

The **Home** screen displays.

3.1.2 Sign Out

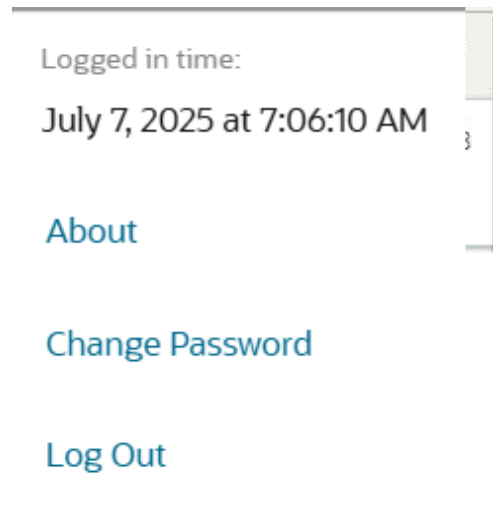
This topic describes the systematic instructions to Sign Out from the application.

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 3-2 User Profile



3. Click **Log out** to sign out from the application.
The application logs out.

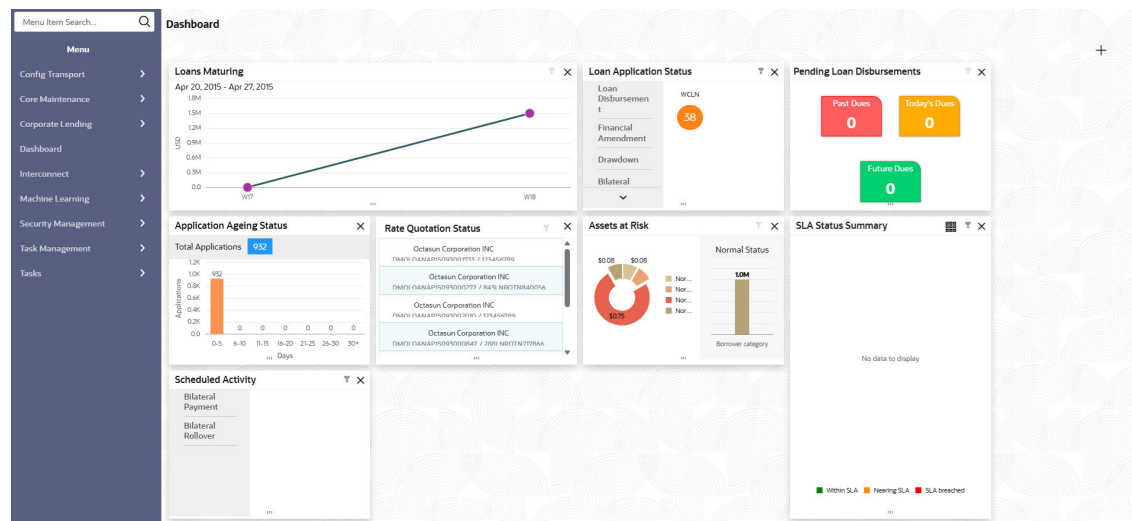
3.2 Application Environment

This topic describes about the various fields available in the application environment.

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

Here is a sample illustration of the home page.

Figure 3-3 Application Environment



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

Table 3-2 Application Environment – Field Description

Field	Description
Hamburger Menu	Click expand/collapse the menu.
Menu	Click to navigate/open the screens associated with the application.
Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards selected using the menu..
Bank Name	Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user. Note: Depending on the logged in user and the branches associated, the user can switch between branches and view the records.
Branch Code	Displays the branch associated with the bank.
Application Date	Displays the last performed application date of branch's EOD.
User Profile	Displays the user profile related options and actions.

This topic contains the following subtopics:

- [Screen Environment](#)
This topic describes about the various components in the screen environment.

3.2.1 Screen Environment

This topic describes about the various components in the screen environment.

This topic contains the following subtopics:

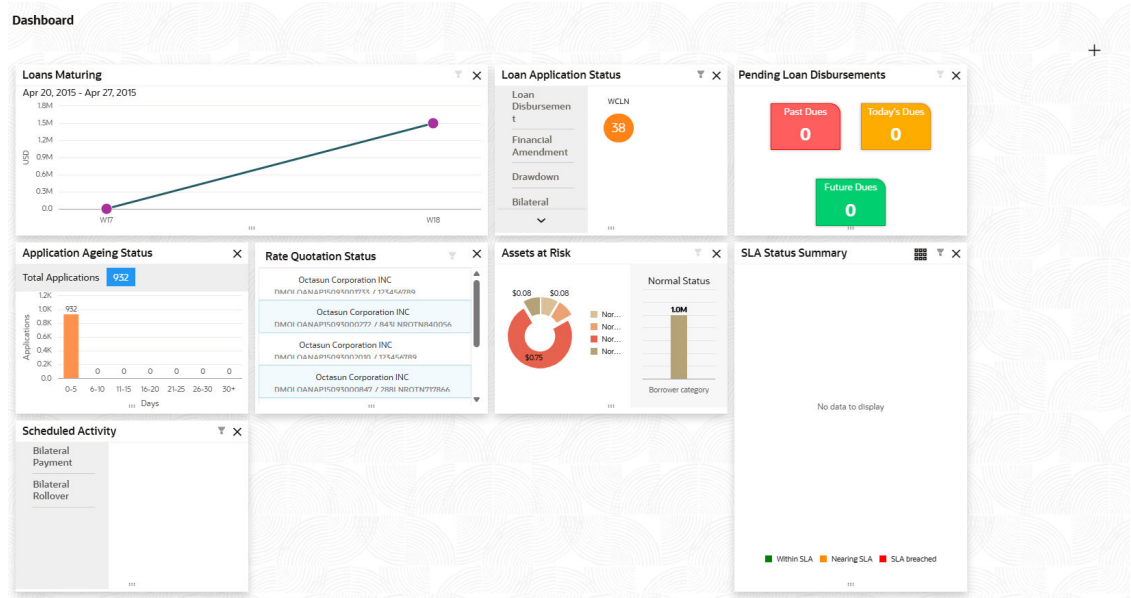
- [Dashboard](#)
This topic describes about the various components on the dashboard.
- [Summary Screen](#)
This topic describes about the various components on the summary screen.
- [Maintenance Screen](#)
This topic describes about the various components in the maintenance screen.

3.2.1.1 Dashboard

This topic describes about the various components on the dashboard.

Depending on the access/permission provided to the logged-in user, the user can view the dashboards associated with the user. These dashboard helps the user to analyse the situation and take the necessary actions.

Figure 3-4 Dashboard

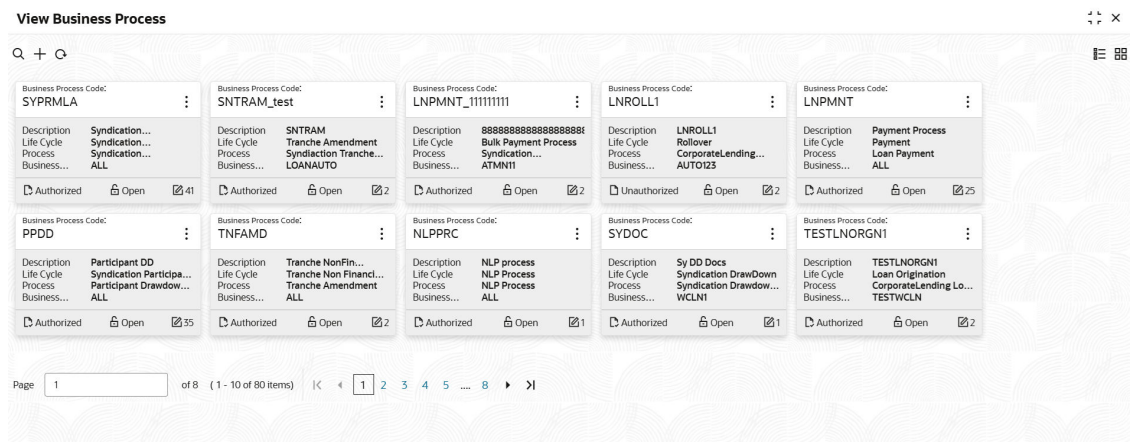


3.2.1.2 Summary Screen

This topic describes about the various components on the summary screen.

Depending on the access/permission provided to the logged in user, the user can access the summary screen. The summary screen provides the information about the configured records, where the user can perform few common actions and view the records.

Figure 3-5 Summary Screen



For more information, refer to the table below.

Table 3-3 Summary Screen – Field Description

Field	Description
Search	Click to search/view a record.
Refresh	Click to refresh all configured records.
Add	Click to create/configure a new record.
Pagination	Displays the number of items available and its page numbers.
Title bar	Displays the name of the screen, minimize, and remove actions. For more information, refer to Minimizing Records and Closing Records .
Records	Displays the configured records. The user can view the records in different format. For more information, refer to Viewing Records .
Tile view	Displays the configured records in the tile format.
List view	Displays the configured records in the list format.

3.2.1.3 Maintenance Screen

This topic describes about the various components in the maintenance screen.

Depending on the access/permission provided to the logged-in user, the user can access the create screen. The create screen allows the user to create/configure the new records using the fields associated with the selected create screen. These new records can also be saved.

Figure 3-6 Maintenance Screen

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

Table 3-4 Maintenance Screen – Field Description

Field	Description
Fields	Displays the fields associated with the selected create screen. There are several types of fields such as text box, drop-down, and so on. These fields are either mandatory or options fields. For more information, refer to Mandatory and Optional Fields .

Table 3-4 (Cont.) Maintenance Screen – Field Description

Field	Description
Tile bar	Displays the name of the screen, minimize, and remove actions. For more information, refer to Minimizing Records and Closing Records .
Save	Click to save the entered details.
Cancel	Click to cancel the entered details.

3.3 How to's

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

As a new user, the user needs 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 has access to the records and data.

Now, the user has learned how to work with your records, the user might want to explore more advanced features.

This topic contains the following subtopics:

- [Access the Records](#)
This topic describes the systematic instructions to access the records.
- [View the Records](#)
This topic describes about the various formats to view the records.
- [Search the Records](#)
This topic describes the systematic instructions to search the records.
- [Refresh the Records](#)
This topic describes the systematic instructions to refresh the records.
- [Create / Configure the Records](#)
This topic describes the systematic instructions to create / configure the records.
- [Edit the Records](#)
This topic describes the systematic instructions to edit the record.
- [Copy the Records](#)
This topic describes the systematic instructions to copy the record.
- [Unlock the Records](#)
This topic describes the systematic instructions to unlock the record.
- [Reopen the Records](#)
This topic describes the systematic instructions to reopen the record.
- [Delete the Records](#)
This topic describes the systematic instructions to delete the record.
- [Print the Records](#)
This topic describes the systematic instructions to print the record.

- [Authorize the Records](#)
This topic describes the systematic instructions to authorize the record.
- [Minimize and Maximize the Records](#)
This topic describes the systematic instructions to minimize and maximize the screen.
- [Close the Records](#)
This topic describes the systematic instructions to close the record.
- [Audit the Records](#)
This topic describes the systematic instructions to audit the record.

3.3.1 Access the Records

This topic describes the systematic instructions to access the records.

The user can access the screens on the permissions/rights provided for the user.

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

1. Navigate to the hamburger menu.
By default, the hamburger menu is expanded.
2. Click <sub-menu>, and click <name of the screen>.
The screens associated with the sub-menu displays.
3. Click create <name of the screen>.
The create <name of the screen> screen displays. The user can create/configure the new records.
4. Click view <name of the screen>.
The view <name of the screen> screen displays. The user can view the configured records.

3.3.2 View the Records

This topic describes about the various formats to view 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.

The various formats to view the records are as follows:

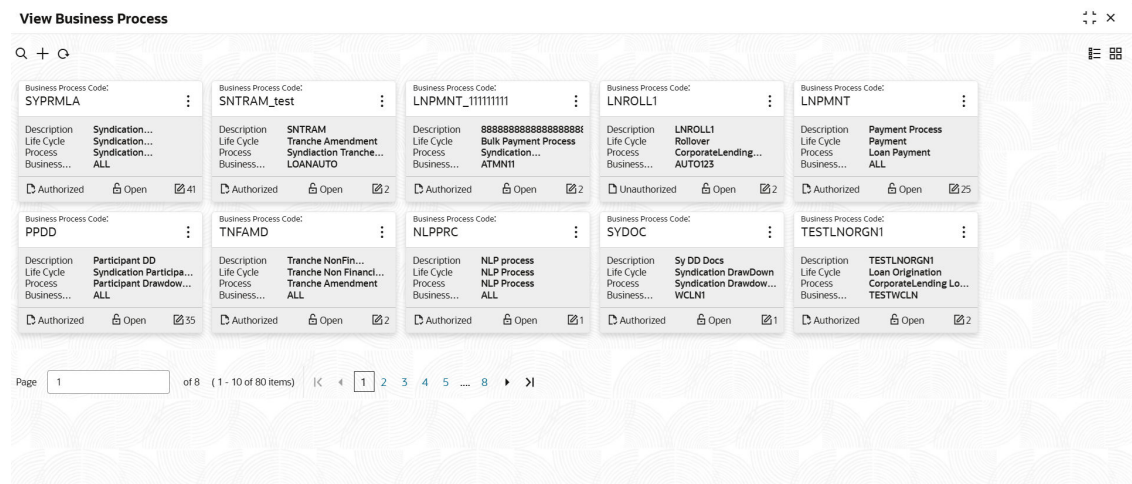
- [Tile View](#)
This topic describes about view the record in tile view.
- [Tile View with Context Menu](#)
This topic describes about view the record in tile view with context menu.
- [List View](#)
This topic describes systematic instructions to view the record in list view.
- [Flip View](#)
This topic describes the systematic instructions to view the record in flip view.

3.3.2.1 Tile View

This topic describes about view the record in tile view.

The default summary view of the records are tile view. Displays the configured records in a tile format with few key fields that are associated with the screen. The user can click a tile to open a record in a full screen and view the details.

Figure 3-7 Tile View



3.3.2.2 Tile View with Context Menu

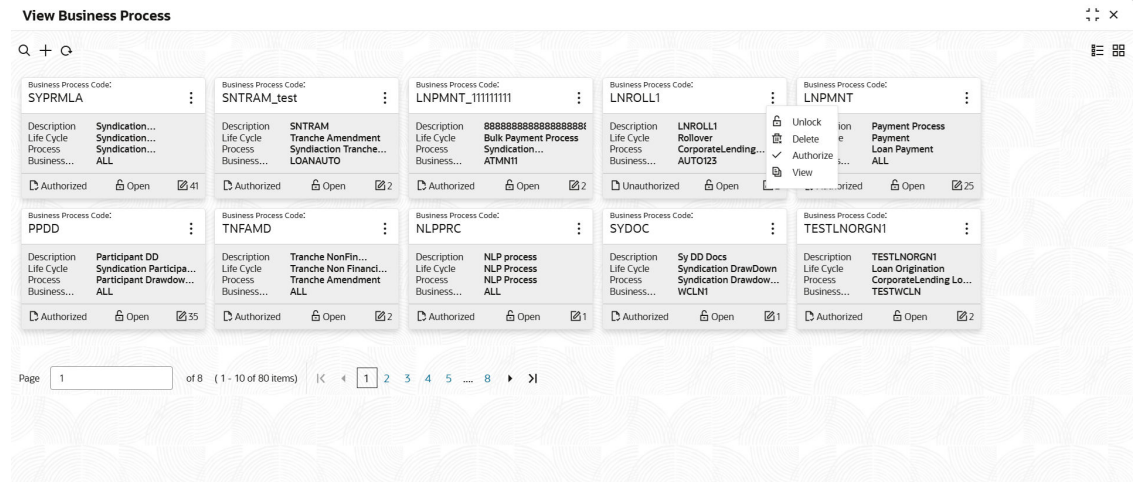
This topic describes about view the record in tile view with context menu.

Tile view with context menu is similar to any tile view summary record. The context menu allows the user to perform any actions that are associated with the records.

The content menu is available for:

- View Account Input
- View Account Closure
- View Account Product
- View Internal Credit Line
- View Line Account Linkage
- View Bank Parameters
- View Virtual Entity
- View Corporate Specific Account Number Range

Figure 3-8 Tile View with Context Menu



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

Table 3-5 Tile View with Context Menu - Field Description

Field	Description
Context Menu	This button appears only to a select the number of screens. The context menu allows the user to perform actions that are associated with the record.
Context Menu Flyout	A list of all actions displays. The list of actions depend on the status of the record.

3.3.2.3 List View

This topic describes systematic instructions to view the record in list view.

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

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

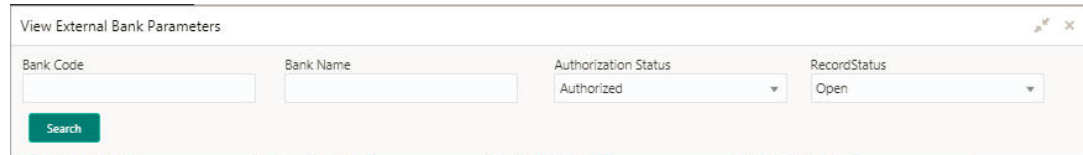
1. Navigate to **View** screen.
2. Click **List View** on the action toolbar to view the details.

The details in the screen displays in list view.

Figure 3-9 List View

1. Navigate to **View** screen.
2. Click **Search** button.
The fields associated with the screen displays.

Figure 3-11 Search



3. Specify the required fields.
4. Click **Search**.
The requested record displays.

3.3.4 Refresh the Records

This topic describes the systematic instructions to refresh the records.

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

1. Navigate to **View** screen.
2. Click **Refresh**.

The records associated with the screen is updated with the latest details.

3.3.5 Create / Configure the Records

This topic describes the systematic instructions to create / configure the records.

The user can create / configure records in any of the three ways:

1. In the selected **View** screen, click **Add** to create / configure a record.
2. In the selected **View** screen, click on a **configured record** and click **New** to create / configure a record.
3. On the **menu**, select a **sub-menu** and click **<Create name of the screen>**.

3.3.6 Edit the Records

This topic describes the systematic instructions to edit the record.

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

Note

Ensure you have the privileges and know the guidelines to modify the records.

1. Navigate to **View** screen.
2. Click the **Record** that need to edit.
3. In a selected screen, click a record and make the required changes to the record.
4. Click **Save**.

The modified record is saved.

3.3.7 Copy the Records

This topic describes the systematic instructions to copy the record.

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

1. Navigate to **View** screen.
2. Click the record that need to copy.
3. Click **Copy** to copy the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

3.3.8 Unlock the Records

This topic describes the systematic instructions to unlock the record.

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

1. Navigate to **View** screen.
2. Click the record that need to unlock.
3. Click **Unlock** to unlock the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

3.3.9 Reopen the Records

This topic describes the systematic instructions to reopen the record.

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

1. Navigate to **View** screen.
2. Click the record that need to reopen.
3. Click **Reopen**.
The **Confirmation** screen appears.
4. Specify a remark.
5. Click **Confirm** to reopen the record.

3.3.10 Delete the Records

This topic describes the systematic instructions to delete the record.

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

Note

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

1. Navigate to **View** screen.
2. Click the record that need to delete.
3. Click **Delete**.

The selected record is deleted.

3.3.11 Print the Records

This topic describes the systematic instructions to print the record.

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

1. Navigate to **View** screen.
2. Click the record that need to print.
3. Click **Print** to view the record in a print format.

The selected record is printed.

3.3.12 Authorize the Records

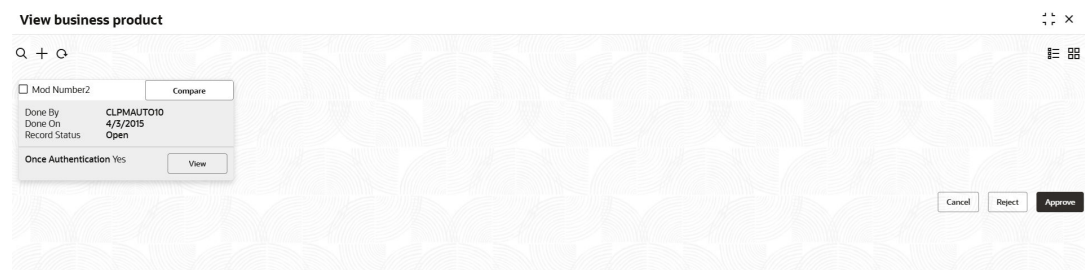
This topic describes the systematic instructions to authorize the record.

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

1. Navigate to **View** screen.
2. Click the record that need to authorize.
3. Click **Authorize**.

The authorized records associated with the screen displays.

Figure 3-12 Authorize



4. Select the required record that must be authorized.
5. Click **Approve** to authorize the record.

3.3.13 Minimize and Maximize the Records

This topic describes the systematic instructions to minimize and maximize the screen.

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

1. Navigate to **View** screen.
2. Click **Collapse** to minimize the screen.

The minimized screen displays at the bottom left corner of the screen.

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

The screen is maximized.

3.3.14 Close the Records

This topic describes the systematic instructions to close the record.

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

1. Navigate to **View** screen.
2. Click **Remove** button to close the record.

The selected record is closed.

Note

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

3.3.15 Audit the Records

This topic describes the systematic instructions to audit the record.

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

1. Navigate to **View** screen.
2. Click **Audit** to view the change history of the record.

The audit detail screen displays.

Figure 3-13 Audit

Maker	Checker
 OBTFFPM09	
 5/5/2021, 8:12:13 AM	
Status	Modification No
 Authorized	1
 Open	

- Click on the screen to close the audit detail screen.

3.4 Screen / Dashboard

This topic describes about the various components in screen / dashboard.

This topic contains the following subtopics:

- [Pagination](#)
This topic describes about the pagination details in the screen.
- [Mandatory and Optional Fields](#)
This topic describes about mandatory and optional fields in the screen.
- [Configure Tile](#)
This topic describes the systematic instructions to configure 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.
- [Add Tile](#)
This topic describes the systematic instructions to add the tile.

3.4.1 Pagination

This topic describes about the pagination details in the screen.

The pagination displays the number of records on the bottom left corner of the selected view screen. The number of pages appears depending on the records available. The user can navigate to the first page, last page, previous page, or next page by using the number options.

3.4.2 Mandatory and Optional Fields

This topic describes about mandatory and optional fields in the screen.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the asterisk (*) symbol. 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.

3.4.3 Configure Tile

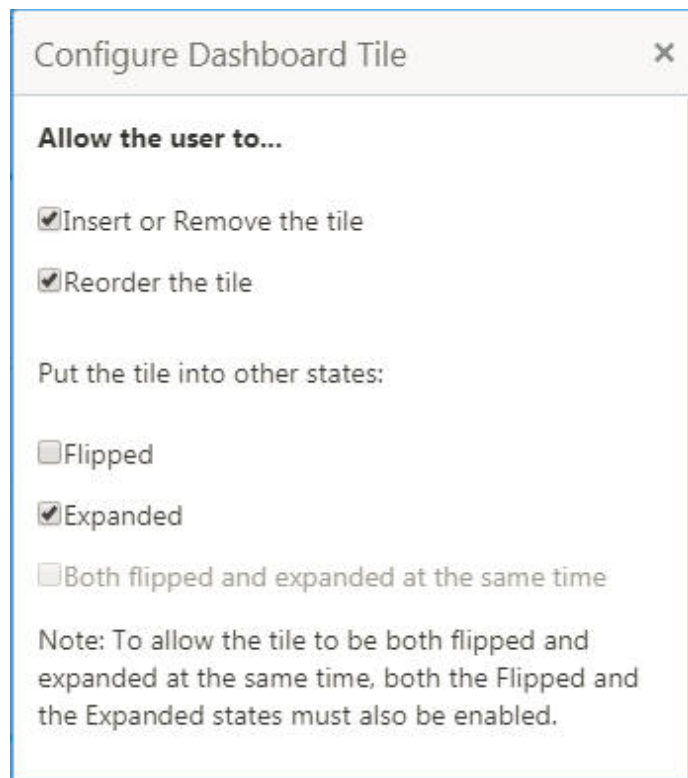
This topic describes the systematic instructions to configure the tile.

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

1. On the Dashboard, click **Configure Tile**.

The **Configure Dashboard Tile** pop-up displays.

Figure 3-14 Configure Dashboard Tile



2. On **Configure Dashboard Tile**, select the required options.

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

Table 3-6 Configure Dashboard Tile

Field	Description
Insert or Remove the tile	If selected, the user can remove the dashboard widget from the dashboard-landing page.
Reorder the tile	If selected, the user can rearrange the dashboard widget in the dashboard-landing page.
Flipped	If selected, the user can flip the dashboard widget for more information.
Expanded	If selected, the user can expand the dashboard widget in the dashboard landing page.

Table 3-6 (Cont.) Configure Dashboard Tile

Field	Description
Both flipped and expanded at the same time	If selected, the user can flip and expand the dashboard widget in the dashboard landing page.

3. Click **Close** button to update the dashboard widget configuration.

3.4.4 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.

3.4.5 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.

3.4.6 Expand Tile

This topic describes the systematic instructions to expand the tile.

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

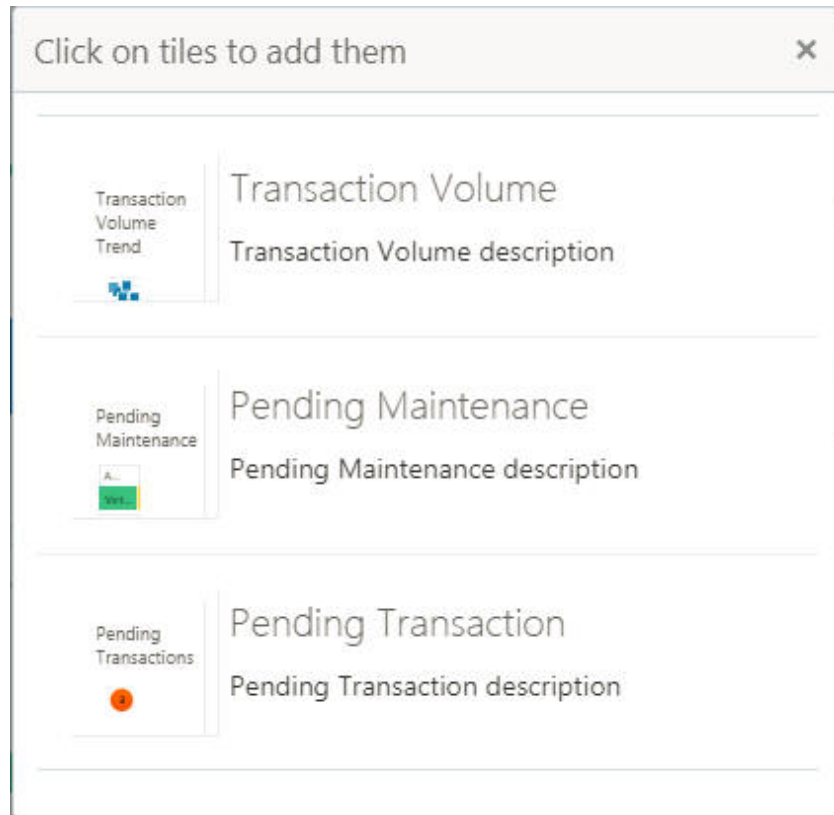
- Click **Expand Tile** to view all the information of the dashboard widget.
The expanded widget displays on a complete row to view more information.

3.4.7 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 3-15 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.

3.5 Icons

The following Icons are used in the screens.

Table 3-7 Icons - Common

Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record

Table 3-7 (Cont.) Icons - Common














Icon	Function
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Calender
	Copy a record
	Click to view the created record.
	Click to unlock, delete, authorize or view the created record.
	Toggle ON
	Toggle OFF

Table 3-8 Icons - Audit Details



Icon	Function
	A user
	Date and time

Table 3-8 (Cont.) Icons - Audit Details







Icon	Function
	Unauthorized or Closed status
	Authorized or Open status

Table 3-9 Icons - Widget

Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status

3.6 Basic Actions

Table 3-10 List of Basic Actions

Action	Description
Approve	Click Approve to approve the initiated report. This button is displayed, once the user click Authorize .
Audit	Click Audit to view the maker details, checker details of the particular record, and record status. 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 report. Only a checker can authorize a record. This button is displayed only for the already created records.
Close	Click Close to close a record. This action is available only when a record is created.
Confirm	Click Confirm to confirm the performed action.
Cancel	Click Cancel to cancel the performed action.
Compare	Click Compare to view the comparison through the field values of old record and the current record. This button is displayed in the widget, once the user click Authorize .

Table 3-10 (Cont.) List of Basic Actions

Action	Description
Collapse All	Click Collapse All to hide the details in the sections. This button is displayed, once the user click Compare .
Expand All	Click Expand All to expand and view all the details in the sections. This button is displayed, once the user click Compare .
New	Click New to add a new record. The system displays a new record to specify the required data. (Note: The fields which are marked with Required are mandatory.)
OK	Click OK to confirm the details in the screen.
Save	Click Save to save the details entered or selected in the screen.
View	Click View to view the report details in a particular modification stage. 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. This button is displayed, once the user click Compare .

3.7 Common Buttons

This topic describes the information about all the common buttons used in the application.

The list of common buttons are as follows.

Table 3-11 List of Buttons

Button	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 screen.
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.

Table 3-11 (Cont.) List of Buttons

Button	Description
<	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.

3.8 Common Fields

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

The list of common fields are as follows.

Table 3-12 Common Fields

Fields	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.

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