

# Oracle® Banking Corporate Lending Process Management

## Oracle Conductor Process Installation Guide



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# Preface

This topic contains following sub-topics:

- [Purpose](#)
- [Acronyms and Abbreviations](#)
- [Audience](#)
- [Basic Actions](#)
- [Critical Patches](#)
- [Conventions](#)
- [Diversity and Inclusion](#)
- [Documentation Accessibility](#)
- [Related Resources](#)
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## Purpose

This guide would help you to install the Oracle Banking Corporate Lending Process Management Conductor based process on designated environment. It is assumed that all the prior setup is already done related to Netflix Conductor.

## Acronyms and Abbreviations

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

**Table 1 Acronyms and Abbreviations**

Abbreviation	Description
DSL	Domain Specific Language
JNDI	Java Naming and Directory Interface
OBCL	Oracle Banking Corporate Lending
OBCLPM	Oracle Banking Corporate Lending Process Management

## Audience

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

- Relationship Managers (RMs)
- Credit Risk Mangers (CRMs)

- Legal
- Back end operation
- Other loan executive staffs in charge of maintaining the loan accounts in the bank.
- WebLogic admin or ops-web team who are responsible for installing OFSS Banking Products.

## Basic Actions

**Table 2 List of Basic Actions**

Action	Description
<b>Approve</b>	Click <b>Approve</b> to approve the initiated report. This button is displayed, once the user click <b>Authorize</b> .
<b>Audit</b>	Click <b>Audit</b> 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.
<b>Authorize</b>	Click <b>Authorize</b> 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.
<b>Close</b>	Click <b>Close</b> to close a record. This action is available only when a record is created.
<b>Confirm</b>	Click <b>Confirm</b> to confirm the performed action.
<b>Cancel</b>	Click <b>Cancel</b> to cancel the performed action.
<b>Compare</b>	Click <b>Compare</b> 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 <b>Authorize</b> .
<b>Collapse All</b>	Click <b>Collapse All</b> to hide the details in the sections. This button is displayed, once the user click <b>Compare</b> .
<b>Expand All</b>	Click <b>Expand All</b> to expand and view all the details in the sections. This button is displayed, once the user click <b>Compare</b> .
<b>New</b>	Click <b>New</b> 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.)
<b>OK</b>	Click <b>OK</b> to confirm the details in the screen.
<b>Save</b>	Click <b>Save</b> to save the details entered or selected in the screen.
<b>View</b>	Click <b>View</b> to view the report details in a particular modification stage. This button is displayed in the widget, once the user click <b>Authorize</b> .
<b>View Difference only</b>	Click <b>View Difference only</b> 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 <b>Compare</b> .

## 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 make sure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

## Conventions

The following text conventions are used in this document:

**Table 3 Conventions**

Convention	Meaning
<b>boldface</b>	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.

## 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.

## 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.

## Related Resources

For further information on conductor process installation of Oracle Banking Corporate Lending Process Management application, refer to the following manuals.

- *Oracle Banking Corporate Lending Process Management Installation Guide*
- *Oracle Banking Microservices Platform Foundation Installation 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.

# Symbols and Icons

The following symbols and icons are used in the screens.

**Table 4   Symbols and Icons - Common**

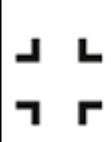
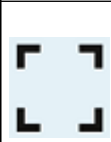



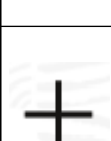


Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record

Table 4 (Cont.) Symbols and Icons - Common










Symbol/Icon	Function
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Calendar
	Filter
	Copy a record
	Click this icon to add a new row.



Table 4 (Cont.) Symbols and Icons - Common




Symbol/Icon	Function
	Click this icon to delete an existing row.
	Click to view the created record.
	Click to unlock, delete, authorize or view the created record.

Table 5 Symbols and Icons - Audit Details









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

Table 6 Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status

# 1

## Deployment of Processes

This topic contains following sub-topics.

- [OBCLPM Processes](#)  
Use conductor processes to deploy in the Oracle Banking Corporate Lending Process Management.
- [Steps to Deploy Conductor Process](#)  
Use steps to deploy conductor process to deploy common and all workflow specific task definitions.

### 1.1 OBCLPM Processes

Use conductor processes to deploy in the Oracle Banking Corporate Lending Process Management.

Deploy the following list of conductor processes for Oracle Banking Corporate Lending Process Management (OBCLPM).

In conductor workflows are defined using a JSON based DSL and includes a set of tasks that are processed as part of the workflows. The tasks are either system tasks or simple tasks (also known as worker tasks). These simple/worker tasks are implemented by application(s) and run in a separate environment from Conductor. These tasks talk to Conductor server through RESTclient. In OBCLPM, for every workflow definition json (For example, LoanAmendment.JSON) file and if required its own worker tasks definition json (TaskDefinitions.JSON) file is maintained. In addition, there is a SharedSimpleTaskDefinitions.JSON file having task definitions that are used across different workflows.

**Table 1-1 OBCLPM Processes**

S.No	OBCLPM Processes	Process Specific Tasks(if any)
1	LOAN ORIGATION	CLMO_FA_LNORGN_MRTRY
2	FINANCIAL AMENDMENT	CLMO_FA_LNRSTR_AMRTY
3	NON FINANCIAL AMENDMENT	CLMO_FA_LNRSTR_AMRTY
4	LOAN PAYMENT	CLMO_FA_LNPMNT_HRTRY
5	ROLLOVER	CLMO_FA_LNRSTR_AMRTY
6	RATE QUOTATION	CLMO_FA_LNRQTN_DRADN
7	DRAFT PROPOSAL	CLMO_FA_DRFTPR_AGRNR
8	NLP PROCESS	CLMO_FA_NLPPRC_ENRICH_NLPDE TAILS,CLMO_FA_NLPPRC_UPDATE_T XNLOGS,CLMO_FA_NLPPRC_INITIAT E_CLMO_APPLICATION
9	RATE QUOTATION PROCESS	CLMO_FA_LNRQTN_CONTRACT_REV ERSAL,CLMO_FA_LNRQTN_INIT_LNO RG
10	ROLLOVER PROCESS	CLMO_FA_ROLVAU_HANDOFF
11	PREMANDATE ARRANGER	CLMO_FA_SNPMDND_EXEST

Table 1-1 (Cont.) OBCLPM Processes

S.No	OBCLPM Processes	Process Specific Tasks(if any)
12	PREMANDATE CO ARRANGER	CLMO_FA_SNPMA_TREXD
13	CONSOLIDATION ROLLOVER	CLMO_FA_SYCNRL_AMRTY
14	ROLLOVER	CLMO_FA_SYSPRL_AMRTY
15	PAYMENT	CLMO_FA_SNPMT_HRTRY
16	POST MANDATE ARRANGER	CLMO_FA_SNPOAR_RCCPS
17	POST MANDATE AGENT	CLMO_FA_SNPOAG_APCPS
18	PARTICIPANT PROCESS	CLMO_FA_SNPRT_PCVCS
19	OPERATIONS ENRICHMENT	CLMO_FA_SNOPE_APCPS
20	AGENCY DRAWDOWN	CLMO_FA_SNAGDS_RHDOF
21	PARTICIPANT DRAWDOWN	CLMO_FA_SNDPWD_HANDOFF
22	DRAWDOWN AMENDMENT	CLMO_FA_SYDAMD_HANDOFF
23	PARTICIPANT TRANSFER	CLMO_FA_SNPATR_HANDOFF
24	RESTRUCTURE	CLMO_FA_LIQDD_HANDOFF
25	BULK PAYMENT	CLMO_FA_BLKPMT_HANDOFF
26	TRANCHE MARGIN AMENMENT	CLMO_FA_SNMRAM_HANDOFF
27	TRANCHE AMENDMENT	CLMO_FA_SNTRAM_HANDOFF
28	TRANCHE NON FIN AMENDMENT	CLMO_FA_TNFAMD_HANDOFF
29	DRAWDOWN	CLMO_FA_LNORGN_MRTRY

Table 1-2 Common Task Definitions

S.No	Common Task Definitions(Used across different OBCLPM processes)
1.	FA_KYC_CHECKER
2.	FA_CAMS_HANDOFF
3.	FA_LNORGN_HANDOFF
4.	FA_STATUS_UPDATE
5.	FA_RISK_APPROVAL
6.	FA_INITIATE_OPS_ENRICH
7.	FA_BORROWER_ONBOARDING
8.	FA_MILESTONE_CHECK
9.	FA_INITIATE_QE
10.	FA_SNDPWD_HANDOFF

## 1.2 Steps to Deploy Conductor Process

Use steps to deploy conductor process to deploy common and all workflow specific task definitions.

### Pre-Requisite

**PLATO-O** and **PLATO-ORCH-SERVICE** services should be up and registered in the Eureka registry.

For the installation of **PLATO-O** and **PLATO-ORCH-SERVICE**, refer to *Oracle Banking Microservices Platform Foundation Installation Guide*.

## Post-Requisite

**CLMO-ORCHESTRATION-SERVICE** should be deployed after registering common task definitions and all workflow specific task definitions (total of 26 task definitions listed above) as this service would have worker implementation for all the simple tasks. Presently this service has 26 worker implementations with 36 threads configured for worker coordinator to manage these workers.

### Note

Steps to deploy a process remains the same for all the process files.

In OBCLPM, for every workflow a workflow definition json (e.g. LoanDraftProposal.JSON) file and if required its own worker tasks definition json (TaskDefinitions.JSON) file will be maintained. Also, there is a SharedSimpleTaskDefinitions.JSON file having simple task definitions that are used across all workflows. To deploy all or any workflow definition.

1. Firstly shared simple tasks definitions should be done. for that below endpoint can be invoked from postman tool with header and payload as described below.

### Note

The host name and port number of the PLATO-ORCH-SERVICE from the eureka registry should be used in this endpoint

Task definitions end point:

`http://whf00mdj:9009/plato-orch-service/api/metadata/taskdefs`

HTTP Method: POST

Header parameters:

Content-Type:application/json

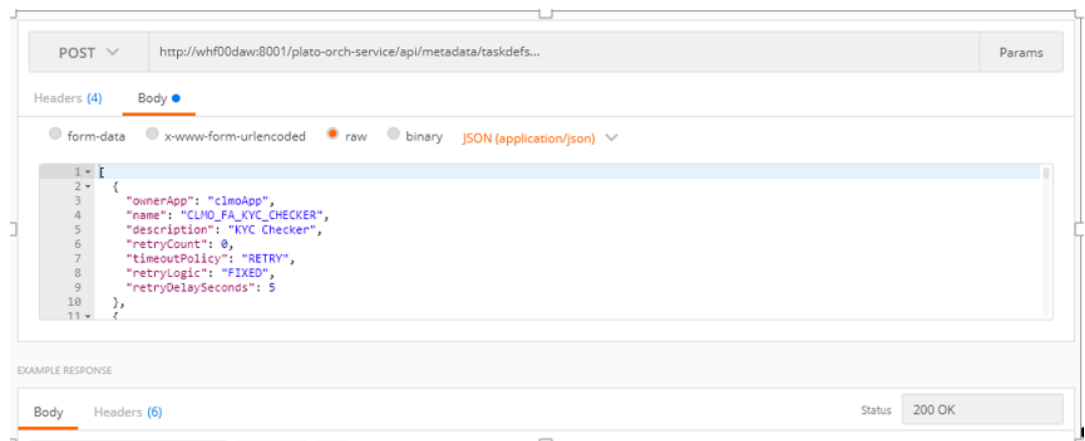
appId:platoorch

branchCode:004

userId:USER1

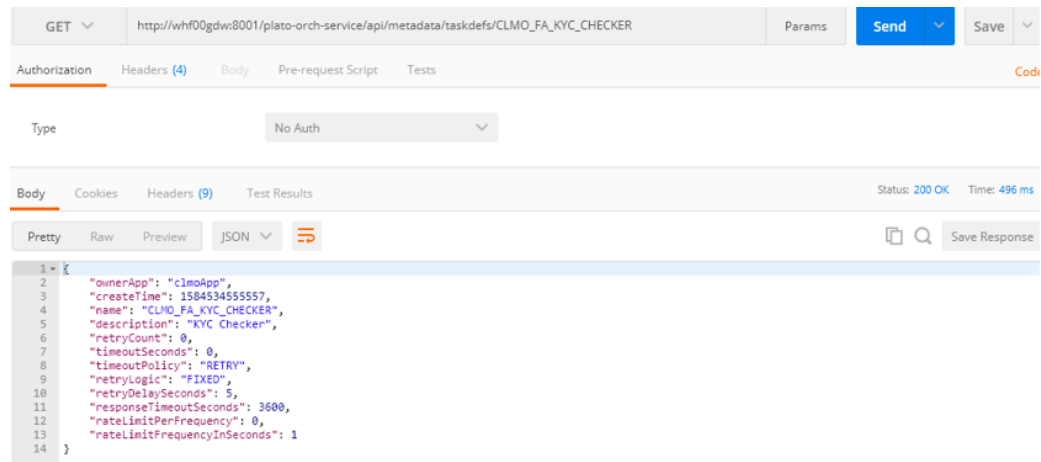
Payload:SharedSimpleTaskDefinitions.JSON content

**Figure 1-1 HTTP Method: POST**



- To verify if any of the task is registered , `http://whf00mdj:9009/plato-orch/u0002service/api/metadata/taskdefs/{taskname}` endpoint can be invoked with GET HTTP Method as shown below.

**Figure 1-2 GET HTTP Method**



- Next workflow specific task definitions should be done. for that use the task definition endpoint mentioned at step 1 and provide workflows specific TaskDefinitions.JSON file content as payload.
- Next workflow definitions should be done. for that use the workflow definition endpoint mentioned below and provide workflows definition json (e.g. LoanDraftProposal.JSON) file content as payload.

k definitions end point:

`http://whf00mdj:9009/plato-orch-service/api/metadata/workflow`

HTTP Method: POST

Header parameters:

Content-Type:application/json

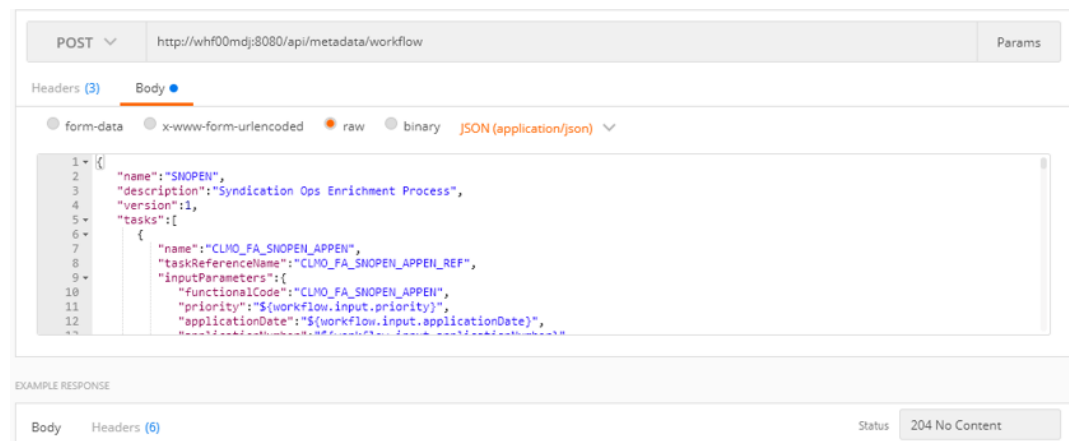
appId:platoorch

branchCode:004

userId:USER1

Payload: LoanDraftProposal.JSON content

**Figure 1-3 Post HTTP Method**



- To verify if the workflow is registered, <http://whf00mdj:9009/plato-orch\u0002service/api/metadata/workflow/DRFTPR?version=1> endpoint can be invoked with GET HTTP Method and check if workflow definitions is available. The workflow name to be used in this GET can be referred from name property workflow definition json. Similarly, all the workflow definitions can be registered and verified one by one.

**Figure 1-4 Get HTTP Method**

