

Oracle® Banking Enterprise Limits and Collateral Management Development Workbench – Getting Started



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Oracle Banking Enterprise Limits and Collateral Management Development Workbench – Getting Started, Release 14.8.0.0.0

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Preface

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- [Acronyms and Abbreviations](#)
The list of the acronyms and abbreviations used in this guide are as follows:
- [Symbols and Icons](#)
The lists of symbols, buttons and shortcut key that are used in the application to perform various tasks are covered in this topic.
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1.1 Purpose

This guide is designed to help acquaint you with the Oracle Banking Enterprise Limits and Collateral Management (ELCM) application. This guide provides answers to specific features and procedures that the user need to be aware of the module to function successfully.

User can further obtain information specific to a particular field by placing the cursor on the relevant field and pressing <F1> on the keyboard.

1.2 Audience

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

Table 1-1 Audience

Role	Function
Back office data entry clerk	Input functions for funds
Back office managers/officers	Authorization functions
Product Managers	Product definition and authorization
End of day operators	Processing during end of day / beginning of day

1.3 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.

1.4 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](#).

1.5 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.

1.6 Basic Actions

Table 1-2 Basic Actions

Action	Description
Approve	Used to approve the initiated report. This button is displayed, once the user click Authorize .
Audit	Used to view the maker details, checker details, and report status.
Authorize	Used to authorize the report created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a report, created by a maker.
Close	Used to close a record. This action is available only when a record is created.
Confirm	Used to confirm the performed action.
Cancel	Used to cancel the performed action.
Compare	Used 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 .
Collapse All	Used to hide the details in the sections. This button is displayed, once the user click Compare .
Expand All	Used to expand and view all the details in the sections. This button is displayed, once the user click Compare .
New	Used to add a new record. When the user click New , the system displays a new record enabling to specify the required data.

Table 1-2 (Cont.) Basic Actions

Action	Description
OK	Used to confirm the details in the screen.
Save	Used to save the details entered or selected in the screen.
View	Used 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	Used 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 .
Unlock	Used to update the details of an existing record. System displays an existing record in editable mode.

1.7 Related Documents

For more information refer to the Oracle Banking manuals on:

- Development of Launch Forms and Others Screens
- Enterprise Collaterals User Guide
- Enterprise Limits and Collaterals Common User Guide

1.8 Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.9 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.

1.10 Acronyms and Abbreviations

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

Table 1-3 Acronyms and Abbreviations

Acronyms	Abbreviations
CIF	Customer Information File

Table 1-3 (Cont.) Acronyms and Abbreviations

Acronyms	Abbreviations
CASA	Current Account and Savings Account
DDA	System that holds the CASA account and balances
ELCM	Enterprise Limits and Collateral Management
ECA	External Credit Approval
FCUBS	Oracle FLEXCUBE Universal Banking Solution
GW	Gateway
HTTP	Hyper Text Transfer Protocol
ID	Identification Number
Mark EOTI	Mark End of Transaction Input
Mark TI	Mark Transaction Input
OFSA	Oracle Financial Services Analytical Applications
ORMD	Oracle Revenue and Billing Management
PK	Primary Key
RDBMS	Relational Data Base Management System
SMS	Security Services
UI	User Interface
VD	Value Date
XML	Extensible Mark-up Language
XSD	XML Schema Definition
XSLT	Extensible Stylesheet Language Transformations

1.11 Symbols and Icons

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

Table 1-4 Symbols and Icons









Icons	Function
	Perform search
	Minimize
	Navigate to the next record
	Navigate to the previous record
	Toggle OFF
	Toggle ON
	Delete
	Click this icon to add a new row.

Table 1-4 (Cont.) Symbols and Icons














Icons	Function
	Click this icon to delete an existing row.
	List view
	Maximize
	Navigate to the first record
	Navigate to the last record
	Advance search
	Search record
	Save the record
	Reset the record
	Clear the record

Table 1-5 Symbols and Icons - Audit Details

Icons	Function
	A user
	Branch details
	Date and Time

1.12 Prerequisite












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

2

Explanation of Some Basic Icons and Jargons

This topic explains some basic Icons and Jargons.

Table 2-1 Icons and Jargons

Icons	Function
	The new button is used to add a new User, Environment, Release, etc.
	The save button is used to save the work done by the user.
	The close button clears all the data on the screen and all buttons will be reset to the initial position.
	Enter query button to retrieve existing data from the screen. The primary key field will be get enabled.
	Execute query button. This gets enabled on clicking the Enter query button. After clicking this button all the required data gets retrieved and displays on the screen.
	Unlock button used to modify the existing record. On click of this, all fields except primary key fields get enabled.
	List Of Values
	To add New labels or modify existing labels in the FLEXCUBE schema.
	Generate Files.
	Deploy Files.
	Release Files.

Radxml: Workbench saves all the activities carried out by the developer in an XML file referred to as **Radxml**.

Rad/RadTool/ODT: These terms also refer to FLEXCUBE Development Workbench for Universal Banking.

3

Client Browser

This topic provides information on client browsers.

- **Recommended Browsers:**
 - **Microsoft Internet Explorer 8.0:** The version of **Microsoft Internet Explorer 8.0** should not be a Beta version, Partner Build, or a Release Candidate. It should be the Final build of Microsoft Internet Explorer 8 or later. The minimum version of Microsoft Internet Explorer 8 should be **8.0.6001.18702**. This can be verified by visiting the **About Internet Explorer** dialog in the **Help** menu as shown below.

Figure 3-1 About Internet Explorer

- **Mozilla Firefox**
- **Google Chrome**
- **Recommended Screen Resolution:** 1280*1024 pixels

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Setting up Internet Explorer

This topic provides systematic instructions for setting up Internet Explorer to enable writing to Client Machines.

ActiveX Scripting has to be enabled to read and write files in the Client Machine. Therefore, certain settings are required in the browser to generate the files in the client machine (instead of downloading as Zip from server); Client Mode is supported only in Internet Explorer.

MSXML 6.0: Microsoft Core XML Services (MSXML 6.0) need to be installed in the system and can download from [MSXML 6.0](#)

1. Open **Internet Explorer** and click on the **Tools** icon at the top right corner.
2. Click on the **Internet options** from the drop-down options.

Internet options window displayed.

Figure 4-1 Internet options



3. Click on the **Security** tab and then select the **Internet** option from **Select a zone to view or change security settings**.
4. Click on the **Custom level** button from the **Security level for this zone**.

Security Settings- Internet Zone screen displayed.

Figure 4-2 Security Settings- Internet Zone

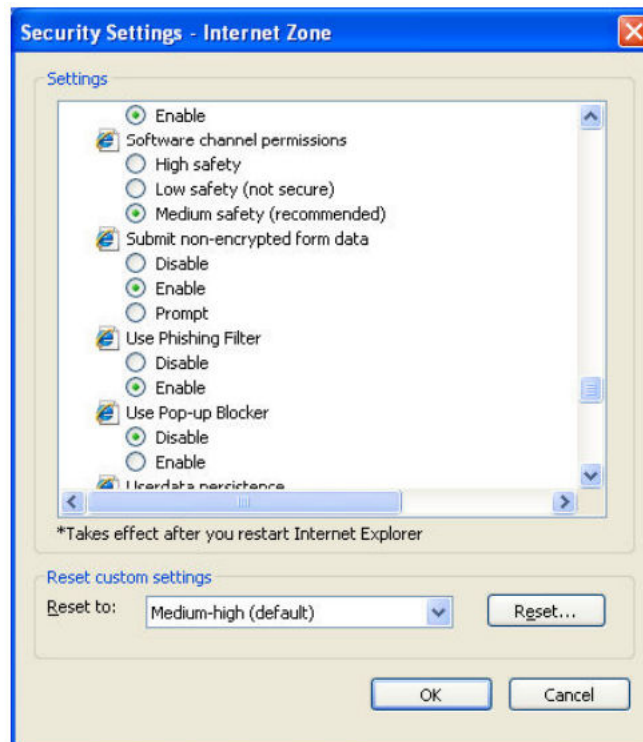
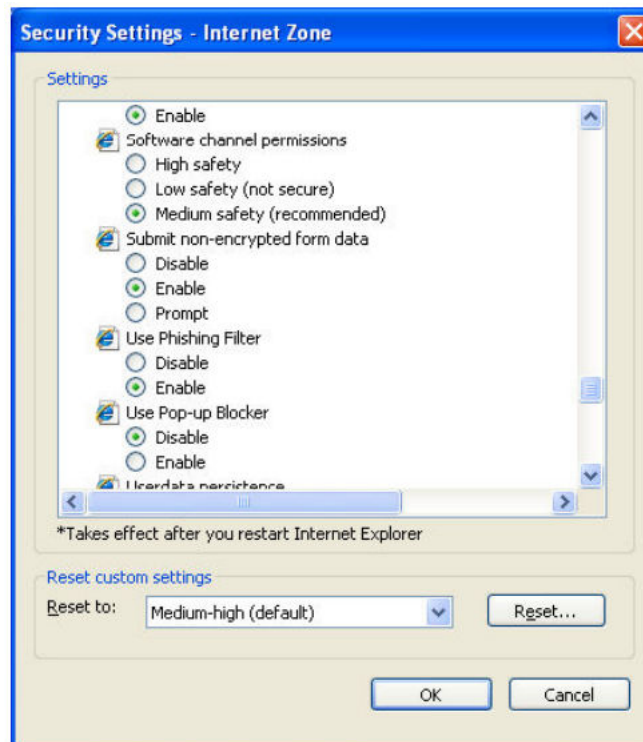


Figure 4-3 Security Settings- Internet Zone

5. Enable following options:
 - **Allow previously unused ActiveX controls to run without prompt**
 - **Allow scriptlets**
 - **Automatic prompting for ActiveX controls**
 - **Binary and script behaviors**
 - **Only allow approved domains to use ActiveX control without prompt**
 - **Run ActiveX controls and plug-ins**
 - **Script ActiveX controls marked safe for scripting**

Mark all option mentioned above as **Enable**, except **Use Pop-up Blocker**.

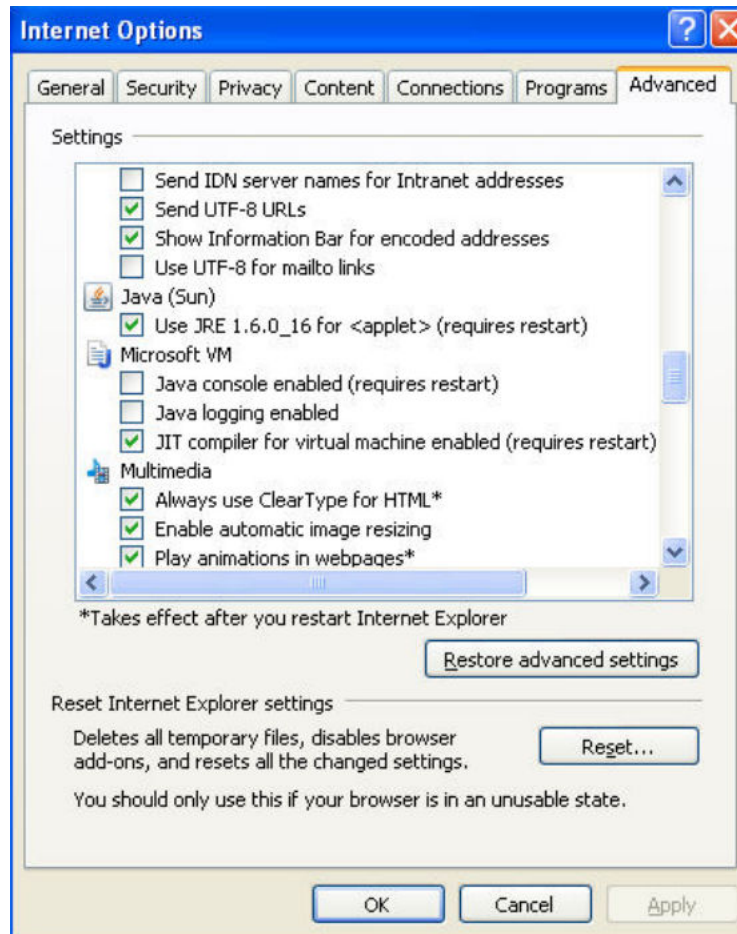
6. Click on the **OK** to save the changes.
7. Go to the **Internet options** window again and then select the **Local Intranet** option from **Select a zone to view or change security settings**.
8. Click on the **Custom level** button from the **Security level for this zone**.
Security Settings- Local Intranet Zone screen displayed.

Figure 4-4 Security Settings- Local Intranet Zone**Figure 4-5 Security Settings- Local Intranet Zone**

9. Enable following options:
 - **Allow previously unused ActiveX controls to run without prompt**
 - **Allow scriptlets**
 - **Automatic prompting for ActiveX controls**
 - **Binary and script behaviors**
 - **Only allow approved domains to use ActiveX control without prompt**
 - **Run ActiveX controls and plug-ins**
 - **Script ActiveX controls marked safe for scripting**

Mark all option mentioned above as **Enable**, except **Use Pop-up Blocker**.

10. Click on the **OK** to save the changes.
11. After all these settings, go to the **Advanced** tab and check the checkbox **Use JRE (Version) for <applet>(requires restart)**.

Figure 4-6 Internet options- Advanced tab**Figure 4-7 Internet options- Advanced tab**

12. Click on the **OK** to save the changes.

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Login to Workbench

This topic provides systematic instructions to log in to Workbench.

Developers will be provided with login credentials for Workbench that has to use for accessing the Tool. After installation, an initial login credentials will be **RADTOOL/RADTOOL**. By using these credentials, the developer has to create release, environment, and users. Refer [Development Workbench – Administration](#) for further details.

- Login to the **ORACLE FLEXCUBE Development Workbench for Universal Banking** with initially provided credentials.

On successful login, the Workbench landing page is displayed. Based on the role, the browser will display the available options to the user in a tree view.

Figure 5-1 Development Workbench for Universal Banking- Browser

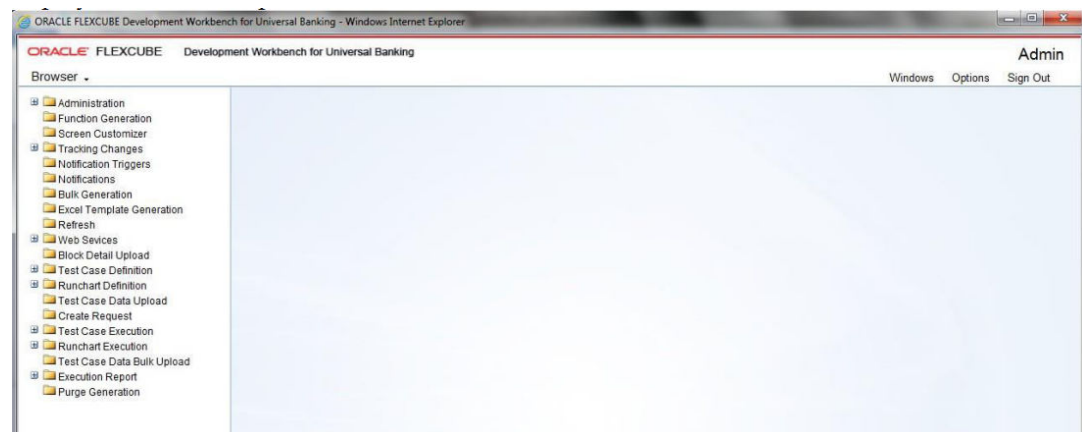


Table 5-1 Browser Menu

Browser Menu	Description
Administration	This is used to add releases, environments, and users.
Function Generation	This is used to design the FLEXCUBE screens.
Screen Customizer	This is used to design the FLEXCUBE screens. The main difference between Function Generation and Screen Customizer is that Screen Customizer allows user to just modify the screen layout. No additions and deletions are allowed.
Tracking Changes	This module helps in tracking the changes done in a particular release. A change report can be generated OR the changes can be viewed.
Notification Triggers	This will be used to create notification triggers.
Notification	This will be used to create notification XML.

Table 5-1 (Cont.) Browser Menu

Browser Menu	Description
Bulk Generation	This option is used to generate all output files for a set of Radxml at one time.
Excel Template Generation	This option will be used to generate an excel template out of Radxml which can be used to upload data into FLEXCUBE.
Refresh	This option will be used to upgrade Radxml from a lower version to a higher version and to update child Radxml with parent changes.
Web Services	Artifacts required for the creation of a Web service can be generated using this feature.
Block Detail Upload	This option will be used to upload block detailed information into schema from a set of Radxml at one time.
Test Case Definition	This option will be used to define new test cases and modify existing test cases.
Run Chart Definition	This option will be used to define run charts for test cases.
Test Case Data Upload	This option will be used to upload test case data for the defined test cases. Data has to be uploaded in the standard excel formats.
Create Request	This option will be used to create request XML (compatible with the FLEXCUBE) for a test case data set.
Test Case Execution	This option is used to execute test cases on the FLEXCUBE environment
Run Chart Execution	This option will be used to execute run chart on the FLEXCUBE environment.
Test Case Data Bulk Upload	This option will be used to upload multiple test case data at one time.
Execution Report	This option generates a report for the executed test cases and run charts.

Table 5-2 ORACLE FLEXCUBE Development Workbench- Other options

Field	Description
Windows	It will display all opened windows in the drop-down menu. The user can select the required window to show on top of the tool.
Sign Out	Click on the Sign Out button to log out from the FLEXCUBE Development Workbench. All opened windows will get closed automatically and it will redirect the user to the login page.
Options	Click on the Options to access multiple options as follow: <ul style="list-style-type: none"> • User Preferences • Change Password • Launch FLEXCUBE UBS • Accessibility Help • About

6

FCUBS Launch

This topic provides information on launching the FLEXCUBE link directly from Workbench.

The user has to maintain the correct FLEXCUBE URL while adding to the environment. Refer [Development Workbench – Administration](#) for the details on environment creation.

Figure 6-1 Environment Master

The screenshot displays the 'Environment Master' dialog box, which is used for configuring the environment. It is divided into three main sections: Environment Details, Application Details, and Database Details. The 'Application URL' field in the Application Details section is highlighted with a red rectangle.

Section	Field	Value
Environment Details	Environment Code	FCUBS_12.0.2_DEV12
	Release Code	FCUBS_12.0.2
	Language Code	ENG
	Description	12.0.2 DEV
JNDI name	JNDI Name	jdbc/DEV1202
Database Details	Database Instance	FCUBSDEV
	Database Port	1521
	Database IP Address	10.184.132.131
	Database Host Name	10.184.132.131
	Database Name	DEV1202
	Database Password	*****
	Modification Number	5
	Maker Id	RADTOOL
Application Details	Application URL	https://10.184.132.129:7
	Application IP Address	10.184.132.129
	Application Name	FCUBS 12.0.2
	Application OS	Unix
	Application Transfer Type	File Manager
	JS Directory Path	/scratch/app/wf1032/us
	UI XML Directory Path	/scratch/app/wf1032/us
	Server User Name	tpani
Server Password	*****	
Server Filemanager URL	https://10.184.132.129:7	
File Manager User Name		
File Manager Password		

Buttons: Test Environment, Close

Maker Date Stamp: 2013-09-04 11:31:52

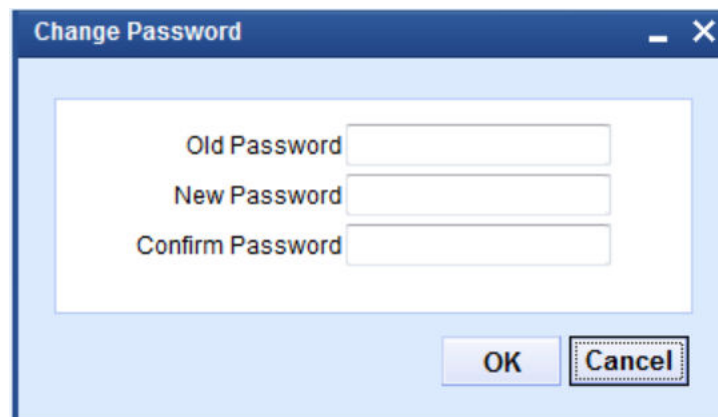
7

Change Password

This topic provides systematic instructions to change the User Password.

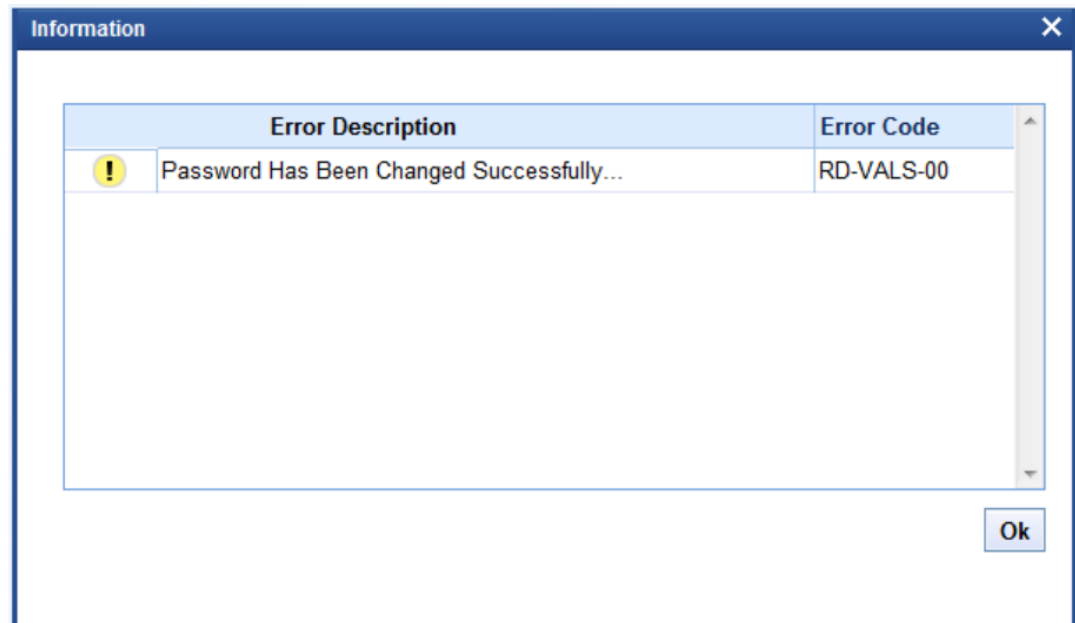
1. On Workbench page, click on the **Options** at top right corner.
2. Select **Change Password** option from the drop-down menu.
Change Password window displayed.

Figure 7-1 Change Password

A screenshot of a 'Change Password' dialog box. The dialog has a blue title bar with the text 'Change Password' and standard window control buttons (minimize, maximize, close). The main area is white and contains three text input fields labeled 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

3. Enter the **Old Password**, **New Password** and **Confirm Password** fields.
4. Click on **OK** to change the password.
On successful change, the **Information** screen displays with a message.

Figure 7-2 Information



8

Setting up User Preferences

This topic provides systematic instructions to set up User Preferences.

1. On Workbench page, click on the **Options** at top right corner.
2. Select **User Preferences** option from the drop-down menu.
Preferences screen displayed.

Figure 8-1 Preferences

3. Specify the following details:

By default, the user will be mapped to a Release code and its corresponding environment details. The preferences details can be modified if the developer wants to change the working release or environment.

Table 8-1 Preferences- Field Descriptions

Field	Description
Language Code	The default language of the environment can be changed if required
Save Mode	The default save mode of the user would be displayed here and can be changed if required.

Table 8-1 (Cont.) Preferences- Field Descriptions

Field	Description
Work Directory	If the Save Mode is modified, the Work Directory can be modified.
Excel Format	Excel Format can be changed from the value defined at the User Definition screen.
XML Indentation	Check the XML Indentation option for the generated XML files indentation.

4. After changing the required fields, click on the **OK** to save the changes.

The recent changes in release, environment, or work directory will affect only the current session. Default release details will be assigned again on the sign-out and re-login to the Workbench. If the developer wishes to change default settings for the user, the same above changes can be done by modifying the default options in the Administration section.

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