Oracle® Banking Enterprise Limits and Collateral Management
Getting Started User Guide

Release 14.8.1.0.0

ORACLE®

Oracle Banking Enterprise Limits and Collateral Management Getting Started User Guide, Release 14.8.1.0.0

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Contents

6   Changing User Password

7   Application Environment

8   Executing User Actions

9   Common Fields

10   Common Icon / Symbols

Index

1

Preface

1.1 Purpose

This guide helps you understand the guiding rules for Oracle Banking Enterprise Limits and Collateral Management licensing, the components included in the license and the units that are separately licensed.

This guide also provides information on the third party software packaged along with Oracle Banking Enterprise Limits and Collateral Management.

1.2 Module Prerequisite

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

> ⓘ **Note**
>
> For more information on login details, please refer to getting started user guide.

1.3 Acronyms and Abbreviations

Table 1-1   Acronyms and Abbreviations

Acronyms	Abbreviations
DDA	System that holds the CASA account and balances
OBELCM	Oarcle Banking Enterprise Limits and Collateral Management
ECA	External Credit Approval

Table 1-1   (Cont.) Acronyms and Abbreviations

Acronyms	Abbreviations
FCUBS	Oracle FLEXCUBE Universal Banking Solution
GW	Gateway
HTTP	Hyper Text Transfer Protocol
ID	Identification Number
ORMB	Oracle Revenue and Billing Management
UI	User Interface
VD	Value Date
XML	eXtensible Mark-up Language
OBELM	Oracle Banking Enterprise Limits Management
URL	Uniform Resource Locator

1.4 Audience

Intended audience of the Enterprise Limits Management User Guide.

Table 1-2   Intended 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.

1.5 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](#).

1.6 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.
italic	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.

1.7 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.

1.8 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.

1.9 Related Documents

For more information refer to the Oracle Banking Enterprise Limits and Collaterals User Manuals on:

- User Defined Fields User Guide
- Enterprise Collaterals User Guide
- Enterprise Limits and Collaterals Common User Guide

1.10 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.

1.11 Symbols and Icons

Table 1-3   Icons

Icons	Function
🔍	Perform search
⌞⌟⌜⌝	Minimize
▶	Navigate to the next record
◀	Navigate to the previous record

Table 1-3   (Cont.) Icons

Icons	Function
	Toggle OFF
	Toggle ON
	Delete
	Click this icon to add a new row.
	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 1-4   Symbols and Icons - Audit Details

Icons	Function
	A user
	Branch details
	Date and Time

1.12 Module Post-Requisites

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

2
About Getting Started

This topic describes about the procedure to get started with Oracle Banking Applications.

The Procedure User Guide helps user get started with Oracle Banking applications. This user guide explains the basic design of Oracle and the common operations that user can follow while using it. This user guide should be used as a supplement and read alongside Common Core, Security Management System, and other application user guides.

3

Access Application

This topic provides the information about the access details for an Oracle Banking application.

The user can access any application using the link provided by the administrator.

This topic contains the following sub-topics:

- [Sign In](#)
  This topic provides the systematic instructions to sign in to the application.

- [Sign Out](#)
  This topic provides the systematic instructions to log out from the application.

3.1 Sign In

This topic provides the systematic instructions to sign in to the application.

Make sure that the valid User Name and Password is created for the user.

1. Specify the URL in the browser address and press **Enter**.

   The **Sign In** screen displays.

Figure 3-1   Signin

2. Specify the required fields on **Sign In** screen.

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. You can log into Oracle ELCM using the user ID provided by your system administrator. The field is not case-sensitive.

Table 3-1   (Cont.) Sign In – Field Description

Field	Description
Password	S
	Enter the password for the user ID specified in the above field. This field is case sensitive.
	Once you have specified the above details, click '**Sign In'**.
	If you have entered the correct user ID and password, the system will log you in and display the 'Home' tab of the 'Application Browser' screen.
	If the user ID or password is incorrect, the system will display an appropriate error message.
	While creating the user profile, if the option '**Force Password Change** is checked, then the system forces you to change your password on first login. However, if the option is not checked, you may continue to use the same password. The system disables the user profile under the following circumstances:
	• The number of successive invalid login attempts reaches the maximum defined for your user ID.
	• The cumulative number of invalid login attempts reaches the maximum defined for your user ID In case the user ID is disabled on any of the above grounds, the system displays a message that your user profile has been disabled.
	• The users designated as Control Clerks can enable your user profile for you to use it again. If you want to exit the system, click exit icon.

3. Click **Sign In** to login to the application.

   The **Home** screen displays.

3.2 Sign Out

This topic provides the systematic instructions to log out from the application.

Make sure that all the fields are entered and saved.

1. In the selected application, navigate to **Toolbar**. From **Toolbar**, click on the user name logged into the application.

   The **User Profile** fly-out screen displays.

Figure 3-2   Log out
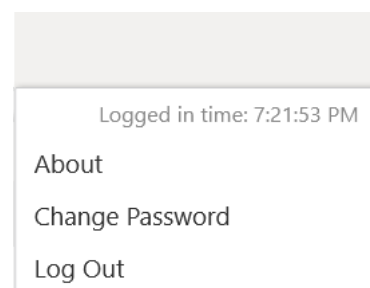
2. Click **Log out** to sign out from the application.

   The application logs out.

4

Application Environment

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

On successful login, the selected application appears depending on the user privileges. A sample illustration of the home page:

Figure 4-1   Application Environment
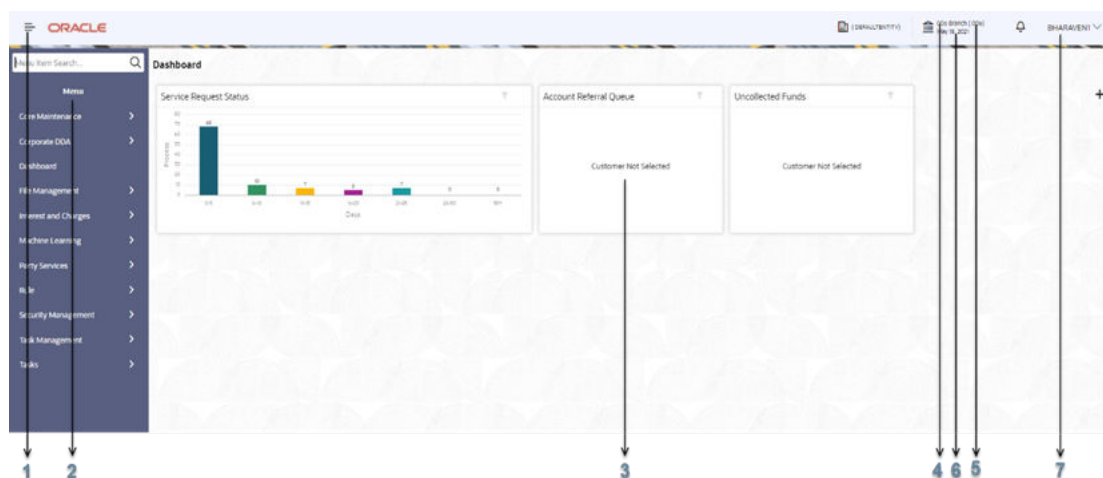
For more infromation, refer to the field description table below.

Table 4-1   Application Environment

Field	Description
Hamburger Menu	Use to expand/collapse the menu.
Menu	Use to navigate/open the screens associated with the application.
Sub-Menu	Click to view the sub-menus associated with the menu. These screens are associated with the menu depending on the user privileges.
DisplayGrid	Displays the screens/dashboards selected using the menu.
Branch Name	Displays the name of the branch
Branch Code	Displays the code associated with the branch. Click to select the branches associated with the logged in user.
UserProfile	User profile related options and actions are available.

5
How to's

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

As a new user need to carry out a series of tasks that are common across all screens, such as to view, edit, delete existing records and more. These tasks explain how to begin working with your record:

When handling records, remember the kinds of records you can create to, view, edit, delete, etc., are based on administrator settings like user profiles or permission sets. Collaborate with your administrator to make sure user have access to the records and data user requires.

Now that you have learned how to work with records, the user might want to explore more advanced features.

This topic contains the following subtopics:

- [View the Records](#)
  This topic describes about the various formats to view the records.

- [Search the Records](#)
  This topic provides the systematic instructions to search the records.

- [Edit the Record](#)
  This topic provides the systematic instructions to edit the records.

- [Copy the Records](#)
  This topic provides the systematic instructions to copy the record.

- [Unlock the Records](#)
  This topic provides the systematic instructions to unlock the record.

- [Delete the Records](#)
  This topic provides the systematic instructions to delete the record.

- [Print the Records](#)
  This topic provides the systematic instructions to print the record.

- [Authorize the Records](#)
  This topic provides the systematic instructions to authorize the record.

- [Minimize the Records](#)
  This topic provides the systematic instructions to minimize the records.

- [Close the Records](#)
  This topic provides the systematic instructions to close the record.

- [Screen/ Dashboard](#)

- [Mandatory and Optional Fields](#)

- [Add the Tile](#)

- [Close the Tile](#)

- [Reorder the Tile](#)

- [Expand the Tile](#)

5.1 View the Records

This topic describes about the various formats to view the records.

User can view the summary of all configured records in the selected summary screen. This helps the user to find the required record faster. A few different formats to view the records are described.

- **Tile View**
  The default summary view of the records is **Tile View**.

  User can see the records displayed in a tile format.

Figure 5-1   Tile View
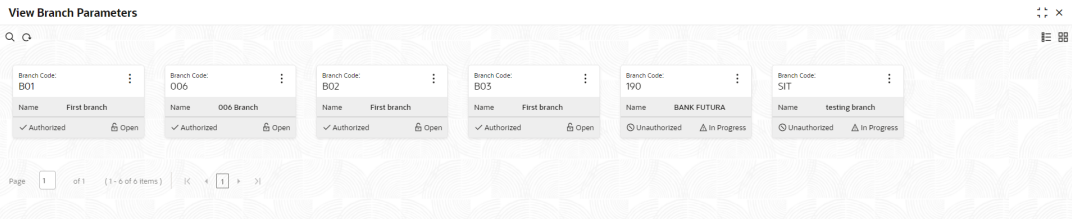
- **List View**
  Click **List View**, to view the records that displays in a list view.

Figure 5-2   List View
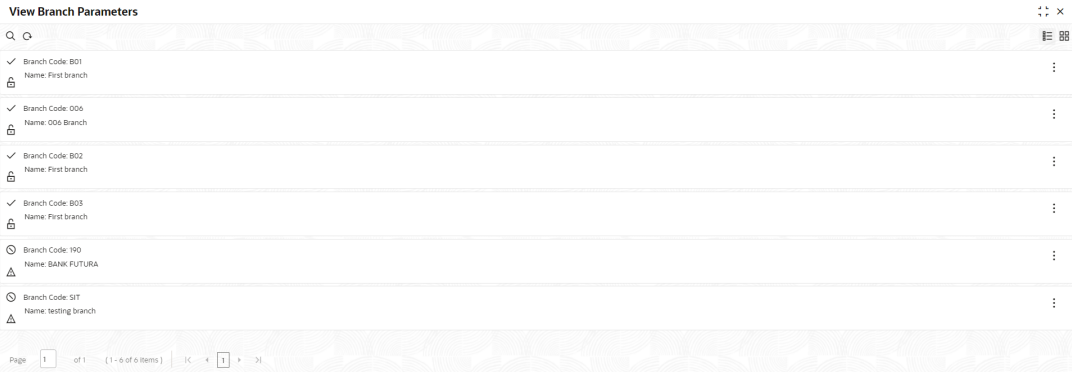
5.2 Search the Records

This topic provides the systematic instructions to search the records.

The user can search the required number of records.

1. In the selected screen, click **Search**.

   The fields associated with the selected screen appear in a drop-down menu.
   A sample screenshot is shown below.

Figure 5-3   Search Filter
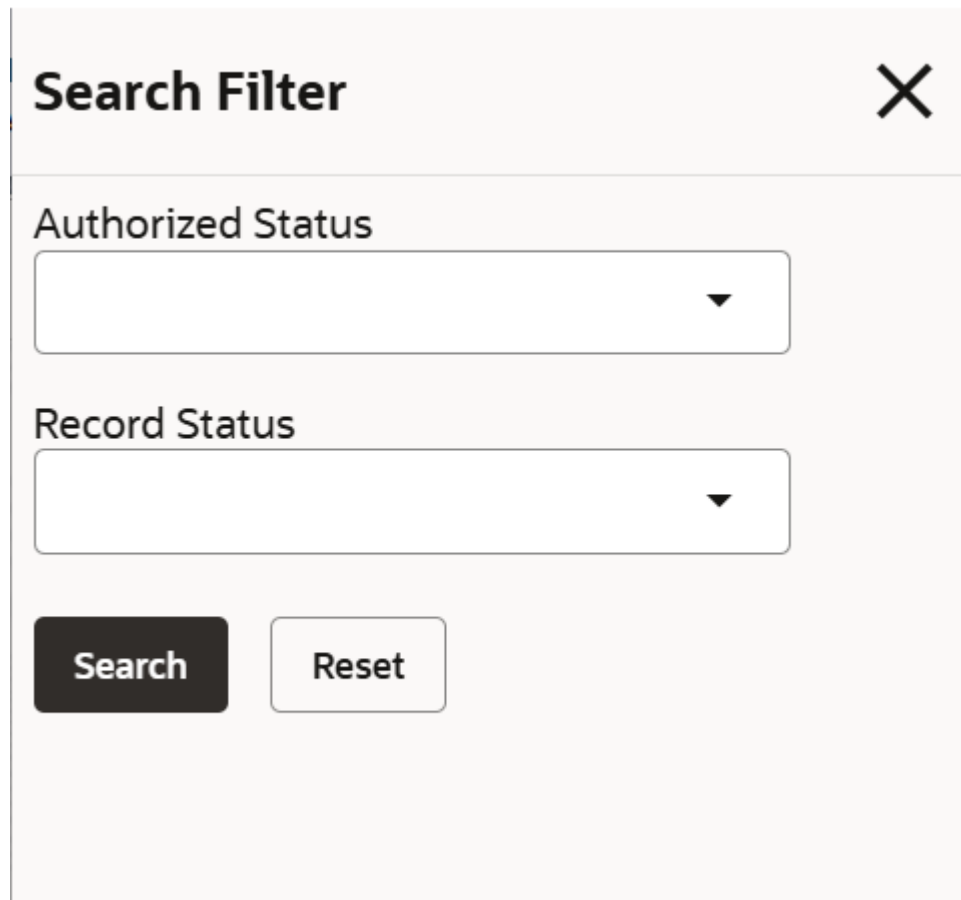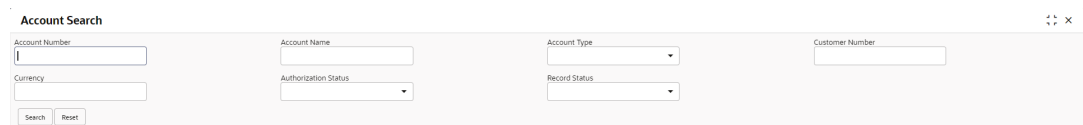
Figure 5-4   Search

2.   Specify the required details associated with the selected screen.

3.   Click **Search**.

The requested record displays.

5.3 Edit the Record

This topic provides the systematic instructions to edit the records.

The user can edit the required number of records.

1.   In a selected screen, click a **Record**.

2.   Click **Copy** to copy the selected record details and make the required changes to the record such as name.

3.   Click **Save** to save the modified record.

5.4 Copy the Records

This topic provides the systematic instructions to copy the record.

Perform the following steps to copy a record:

1. On the selected screen, click **Record**.

2. Click **Copy** to copy the selected record details and do the required changes to the record.

3. Click **Save** to save the modified record.

5.5 Unlock the Records

This topic provides the systematic instructions to unlock the record.

Perform the following steps to unlock a record:

1. On selected screen, click **Record**.

2. Click **Unlock** to unlock the selected record details and do the required changes to the record.

3. Click **Save** to save the modified record.

5.6 Delete the Records

This topic provides the systematic instructions to delete the record.

> ⓘ **Note**
>
> Ensure that you have the privileges and know the guidelines to delete the records.

- On selected virtual page, select a record and click **Delete**.

  The selected record gets deleted.

5.7 Print the Records

This topic provides the systematic instructions to print the record.

1. On selected screen, click **Record**.

2. Click **Print** to view the record in a print format and print the records.

5.8 Authorize the Records

This topic provides the systematic instructions to authorize the record.

1. On selected screen, click **Record**.

2. Click **Authorize**.

   The records associated with the selected screen that must be authorized appears. The **Authorization** screen displays.

Figure 5-5   Authorize
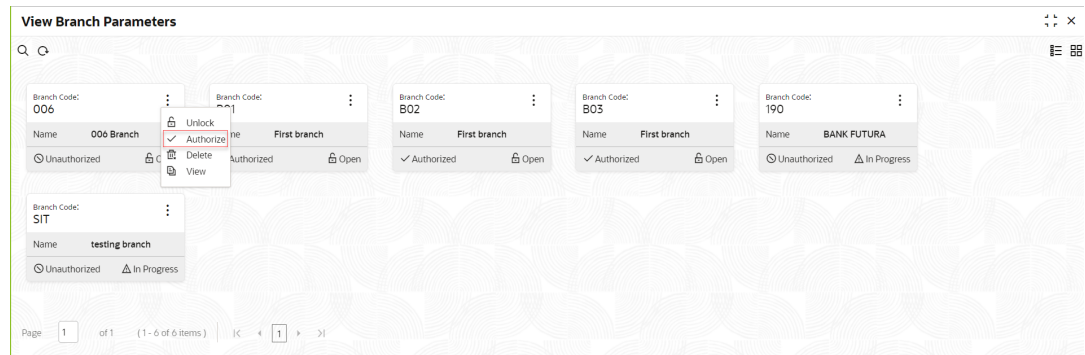
3. Click **Authorize**.

    The records associated with the selected screen that must be authorized appears.

4. Click **Confirm** to authorize the record.

Figure 5-6   Authorization
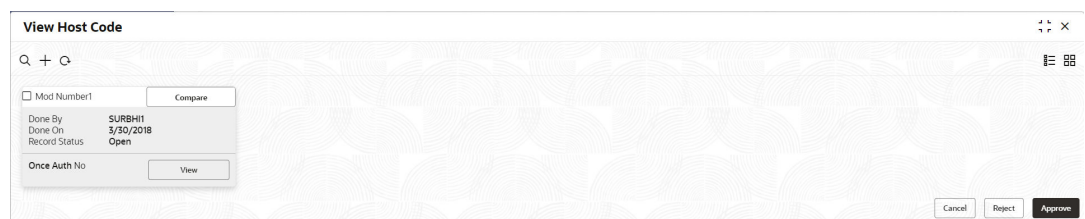
5.9 Minimize the Records

This topic provides the systematic instructions to minimize the records.

On selected screen, click **Collapse** to minimize the screen.

The minimized screen appears at the bottom of the page.

5.10 Close the Records

This topic provides the systematic instructions to close the record.

In the selected screen, click **Remove** to close the screen. If you are in the middle of creating/ modifying the records in a selected screen, an error/warning message appears prompting to save the changes.

5.11 Screen/ Dashboard

There are several actions that can be performed in a selected screen/dashboard.

5.12 Mandatory and Optional Fields

There are mandatory and optional fields available for any screen. You can identify themandatory field with (*) symbol. The mandatory fields are also highlighted as an error if the user does not enter any value for it.

5.13 Add the Tile

1. Click **Add Tiles to Dashboard** (+) to add more dashboard widgets to the dashboard landing page. The **Click on tiles to add them** popup screen appears

Figure 5-7   Add
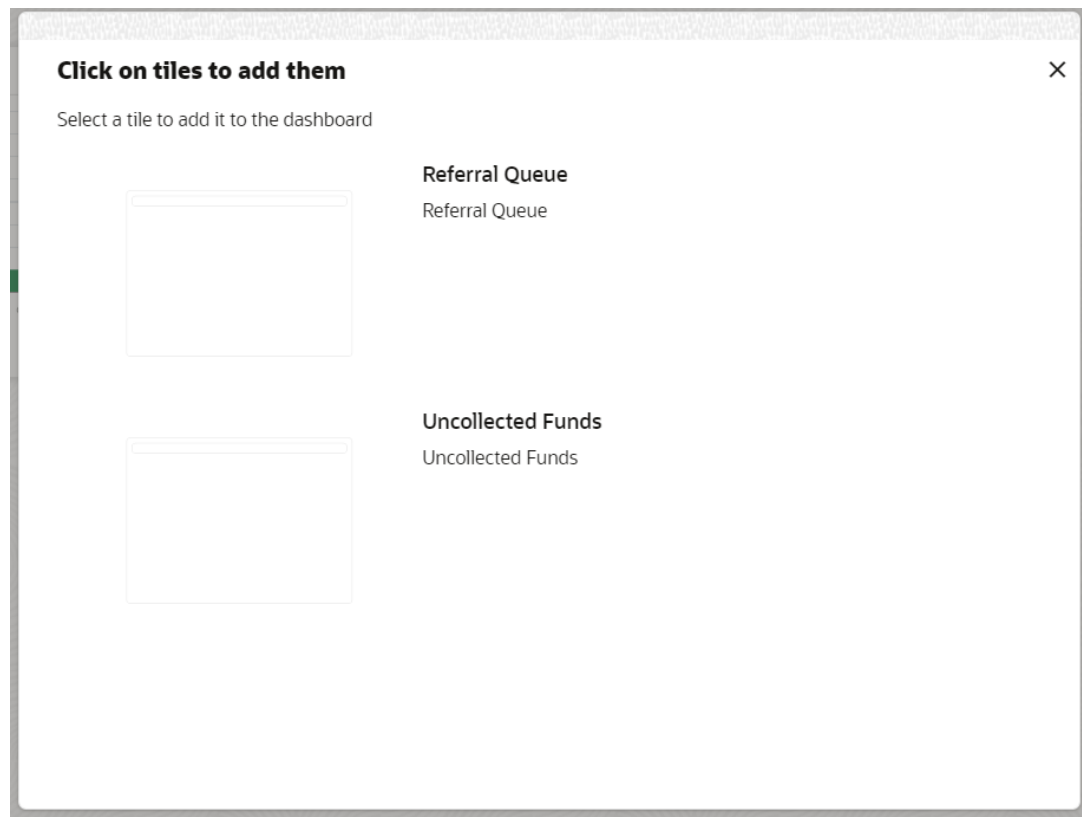
2. Click the dashboard you want to add to the dashboard landing page. The page is automatically refreshed and displays theadded dashboard widget

5.14 Close the Tile

Click **Remove** to remove the dashboard widget from the landing page. The removed widgets are available under the **Add Tiles** option.

5.15 Reorder the Tile

Select and drag the **Drag to Reorder** option to drop the dashboard widget at the desired place. The page is automatically refreshed and displays the updated order.

5.16 Expand the Tile

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

6

Changing User Password

Users have the ability to modify their passwords at any time as needed. Control Clerks can also activate a mandatory password change and configure a notification to be shown for users whose password change is imminent. In Oracle ELCM, user passwords can be altered through two methods:

1. Periodic Password Change: A specific timeframe can be established in Oracle ELCM for the modification of the user password. When the time for the password change arrives, upon the user's next login attempt, the 'Password Change for User' interface will be presented by the system.

2. Manual Password Change: Users have the option to change their passwords at any time. By hovering over the logged-in username, the 'User Action' menu will appear. The 'Change Password' link should be selected. The 'Change Password' screen will then be presented by the system. In the bank level parameters table, which is available to users assigned as Control Clerks, it is possible to specify that a reminder or notification should be shown a predetermined number of days prior to the scheduled password change.
For instance, the bank level parameters can be configured to display a password change reminder three days before the change is required. Consequently, three days before the password change deadline, a reminder will be visible upon logging into the system. This message will be shown at every login until the password is successfully changed by the user.

7
Application Environment

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

On successful login, the selected application appears depending on the user privileges. A sample illustration of the home page:

Figure 7-1   Application Environment
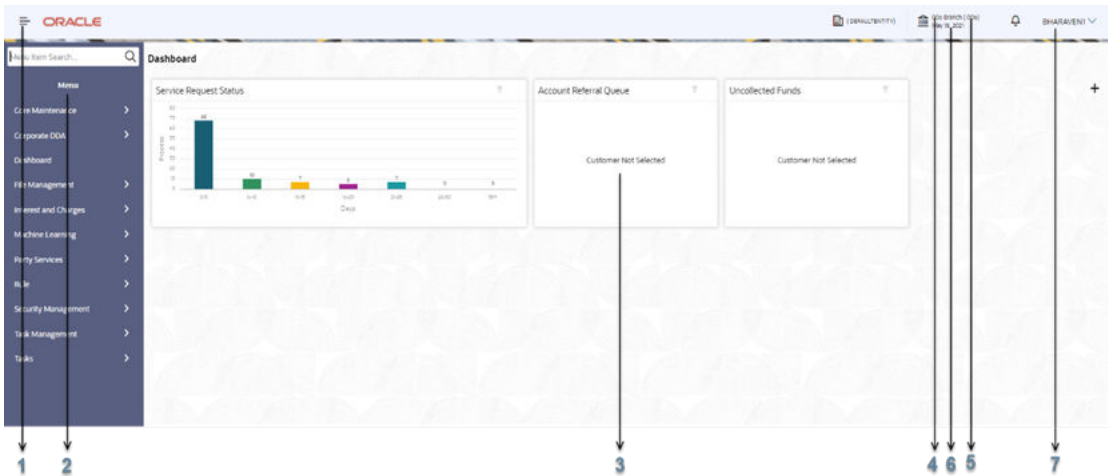
For more infromation, refer to the field description table below.

Table 7-1   Application Environment

Field	Description
Hamburger Menu	Use to expand/collapse the menu.
Menu	Use to navigate/open the screens associated with the application.
Sub-Menu	Click to view the sub-menus associated with the menu. These screens are associated with the menu depending on the user privileges.
DisplayGrid	Displays the screens/dashboards selected using the menu.
Branch Name	Displays the name of the branch
Branch Code	Displays the code associated with the branch. Click to select the branches associated with the logged in user.
UserProfile	User profile related options and actions are available.

8

Executing User Actions

The execution of specific user actions is enabled by Oracle ELCM directly from the Application Browser. Hover your mouse over the username shown on the Application toolbar. The following user actions can be performed:

1. Set User Hot Keys

2. User Settings

3. Change user password

4. Performance statistics

5. Debug Window

6. Clear user

9
Common Fields

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

The list of common fields are described as follows.

Table 9-1   Common Fields

Field	Description
Branch Code	You can select a configured branch code which you want to associate with the selected screen.
Maker	Displays the name of the logged in user who created.
Customer Number	You can select a configured customer number which you want to associate with the selected screen. You can configure the customer number using the Create. screen.
Account Number	You can select a configured account number which you want to associate with the selected screen. You can configure the account number using the Create.
Source System	You 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	You 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	You 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.
Auth Status	Displays the status of the record. • **Authorized**: The record is verified and authorized. • **Unauthorized**: The record is not verified. • **Rejected**: The record is rejected. • **Open**: The record is open and waiting for verification. • **Locked**: The record is locked. • **Closed**: The record is closed.
Record Status	Displays the status of the record. • **Open**: The record is open and waiting for verification. • **Locked**: The record is locked.

10

Common Icon / Symbols

This topic provides the information about all the common icons and symbols used in the application.

The list of common icons are available on all screen as follows.

Table 10-1   Icons - Common

Icon	Function
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 recordfor the selected screen.
Copy	Copy the configured record, modify the details and save with adifferent name for the record.
Delete	Remove the configured 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.
Audit	Check the history of the configured records for the selected
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.
-	Remove a row in the grid for the selected screen.
>	Select a record and move it to the required selected list grid.
<	Select a record and move it back to the available list grid.
|<	Move all the avilable list of records to the selected list of grids.
>|	Move back all the sekected list of records to the available list.

Glossary

Index

A

Application Environment, *1*, *1*
Authorize the Records, *4*

C

Close the Records, *5*
Common Fields, *1*
Common Icons and Symbols, *1*
Copy the Records, *4*

D

Delete the Records, *4*

H

How to's, *1*

M

Minimize Records, *5*

P

Print the Records, *4*

S

Search Filter, *2*
Sign In, *1*
Sign Out, *3*

U

Unlock the Records, *4*

V

View the Records, *2*