Oracle® Database

Alerts and Dashboards User Guide

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Preface

- Purpose
- Audience
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- Diversity and Inclusion
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Purpose

Welcome to the **Alerts and Dashboard** user guide for Oracle Banking Origination. This document provides an overview on the **Dashboard** widgets and **Alerts** available in Oracle Banking Origination and guides you through the various features in dashboards and notifications can are available respectively. This document helps you conveniently make use of dashboards.

Audience

The user guide is intended for the Relationship Managers (RMs) and Sales Officers in-charge of sourcing the bank products from prospect and customer of the bank. The user guide is also intended for the other bank personas such as Account Opening Officer, Account Opening Supervisor, Loan Officer and Credit Manager handling the specific stages of the Savings Account, Current Account and Loan lifecycle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

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

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.

Acronyms and Abbreviations

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

Table 1 Acronyms table

Abbreviation	Description
DS	Data Segment
System	Oracle Banking Origination Module
OBA	Oracle Banking Accounts
OBO	Oracle Banking Origination

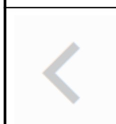
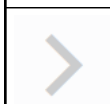
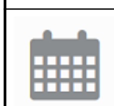
Conventions

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.

Symbol and Icons

Table 2   Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the previous record
	Navigate to the next record
	Refresh
	Calendar
	Alerts

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 Dashboards

This topic provides the information about the Dasboards available in Oracle Banking Origination

Oracle Banking Origination is the middle office banking solution with a comprehensive coverage of Retail Banking Origination processes for Savings Account, Current Account, Term Deposit, Credit Card, and Loans comprising of Home Loan, Personal Loan, Education Loan, and Vehicle Loan. It is a Host-Agnostic solution.

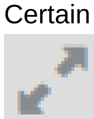
It enables banks to deliver improved user experience for various Bank persons such as Sales Officers, Relationship Manager, Account Opening Officers, Branch Supervisor/Managers, Loan Officers, and Credit Officers and so on; handling defined functions in the life-cycle of the various product origination.

Oracle Banking Origination supports the various dashboards to aid in enhancing the productivity and operational efficiency by providing a quick insight into various pertinent areas. The idea of these Dashboards is to ease the trouble of looking for data or statistics in the system.

Each dashboard has a unique **Functional Activity Codes**. The access of the dashboard is provided to the individual user either by assigning the specific functional activity code to the role that they belong to or can also be provided by assigning the dashboard functional activity code directly to their User ID.

> **Note:**
>
> Refer to the **Configuration User Guide** for more details.

By default, all the dashboard that has been assigned for the User or User Role are displayed in the dashboard. The user can define their personal dashboard preferences by:

1. Removing any dashboard tile that they do not want to see by clicking on **x** icon available on the top right side of the dashboard tile or widget.
2. They can add a dashboard tile by clicking on the **+** icon on the top right side of the dashboard screen named **Add Tile to the Dashboard**. System displays all the dashboards that are allowed for the user to select.
3. They can move the dashboard tile to their preferred position in the dashboard screen through drag and drop.
4. Certain dashboard tiles can be expanded or minimized, for which User has to click on the  icon available in the bottom right side panel of the dashboard tile.

This topic contains the following subtopics:

- My Applications
  This topic describes systematic instructions to view My Applications dashboard.

- Application Search
  This topic describes systematic instructions to view Application Search dashboard.
- Conversion Analysis
  This topic describes systematic instructions to view Conversion Analysis dashboard.
- Account Opening Trends
  This topic describes about the various account opening trends in Oracle Banking Origination.
- Loan Pipeline
  This topic describes systematic instructions to display Loan Pipeline dashboard.
- Loan Offer Status
  This topic describes systematic instructions to view Loan Offer Status dashboard.
- Loan Exposure to Collateral
  This topic describes systematic instructions to view Loan Exposure to Collateral dashboard.
- Product Application Near Expiry
  This topic describes systematic instructions to view Product Application Near Expiry dashboard.
- Loan Offers Near Expiry
  This topic describes systematic instructions to view Loan Offers Near Expiry dashboard.
- SLA Status Summary
  This topic describes systematic instructions to view SLA Status Summary dashboard.

1.1 My Applications

This topic describes systematic instructions to view My Applications dashboard.

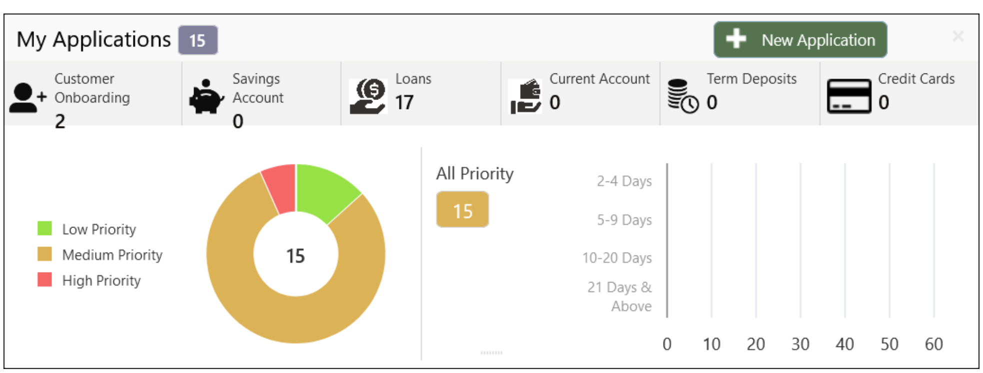
The **My Application** dashboard allows the logged-in bank user, who could be a Relationship Manager, Sales Manager, Loan Officer, and so on, to view the details of the applications originated by them.

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

1. On **Home** screen, click **Dashboard**.

   The **My Applications** dashboard displays in **Dashboard** screen

Figure 1-1 My Applications



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

Table 1-1 My Applications – Field Description

Field	Description
Customer Onboarding	Displays the total number of new customer onboarding requests initiated in the application.
Savings Account	Displays the total number of Saving Accounts requests initiated in the application.
Loans	Displays the total number of Loans requests initiated in the application.
Current Account	Displays the total number of Current Account requests initiated in the application.
Term Deposits	Displays the total number of Term Deposits requests initiated in the application.
Credit Cards	Displays the total number of Credit Cards requests initiated in the application.

Donut view displays the total number of applications initiated by the user, divided into the priorities allocated to the application during initiation.

The available priorities are:

- **High**
- **Medium**
- **Low**

2. Hover on the donut split for the specific priority and click it.

   The right side screen gets populated with the number for the specified selected priority, with the split of applications into various age buckets as mentioned below:

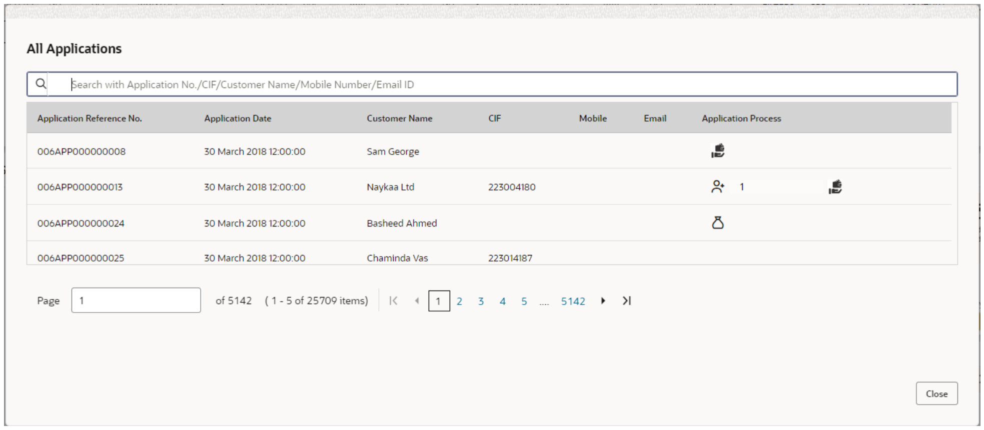
   - **Less than 5 Days**
   - **5-10 Days**
   - **10-20 Days**
   - **21 Days and Above**

   Hyperlinks are available on all the displayed numbers to drill-down and to view the application list.

3. Click on hyperlinked number.

   The **All Applications** screen displays.

Figure 1-2 All Applications Drill-Down



The **All Applications** screen displays the list of various applications.

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

Table 1-2 All Applications – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Mobile No	Displays the mobile number.
E-mail	Displays the E-mail ID.
Application Process	Displays the icons representing the Product or Application process.

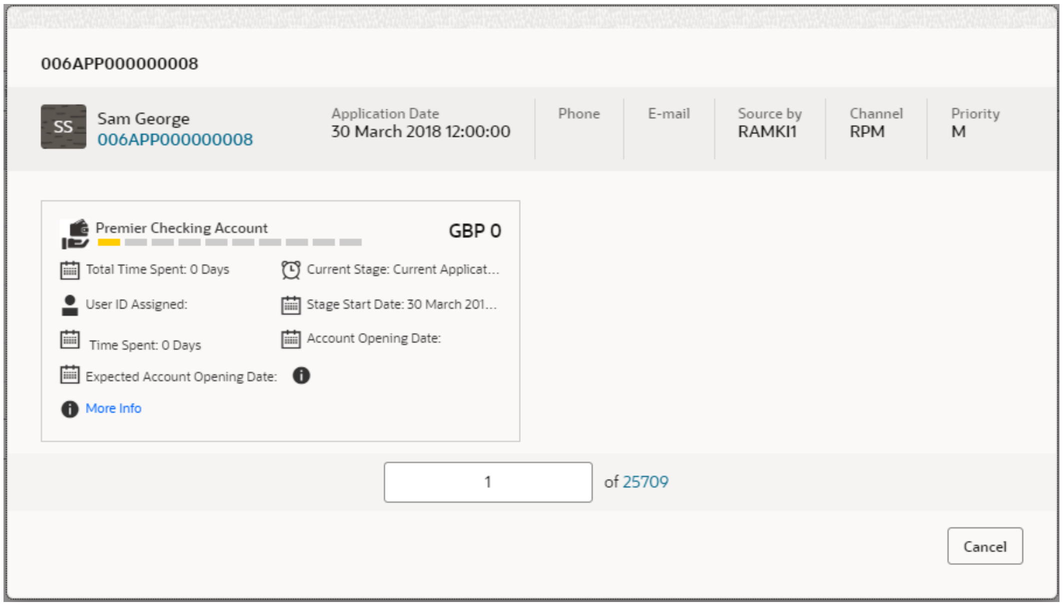
The user can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

4. Click the specific application row to view more details about the application.

   The **Application Details Drill-Down** screen displays.

Figure 1-3 Application Details Drill-Down



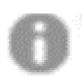
The **Application Information** screen displays separate cards for various products initiated as part of the application.

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

Table 1-3 Application Information – Field Description

Field	Description
Application Date	Displays the application date.
Phone	Displays the phone number.
E-mail	Displays the E-mail ID.
Source By	Displays the username who has sourced the application.
Channel	Displays the channel name.
Priority	Displays the priority of the application. • **High** • **Medium** • **Low**
Product Name	Displays the product name of the application.
Stage Bar	Indicates the current stage of the application.
Account Number	Displays the HOST account number. **NOTE:** This field displays once all the stages are completed for the application and the account is created in Host.
Total time spent	Displays the time spent for the product process since initiation of the application.
User ID Assigned	Displays the **User ID** of the user currently working on the product process. **NOTE:** This is blank in case the product process task is not acquired by any user.
Time spent	Displays the days spent in the current phase/stage.

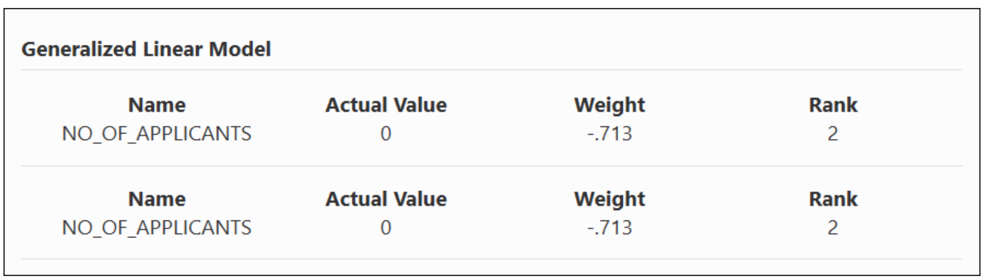
Table 1-3 (Cont.) Application Information – Field Description

Field	Description
Current Stage	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the current stage is displayed as current phase.
Stage Start Date	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date.
Account Opening Date	Displays the account opening date.
Expected Account Opening Date	Displays the expected account opening date.
	Displays the information on the features considered to predict the expected account opening date.
More Info	Click **More Info** hyperlink to view more details about the customer clarification raised.
Application Number	Displays the application number.

5. Click  icon to launch the Data Points pop-up screen.

   The **Data Points** pop-up displays.

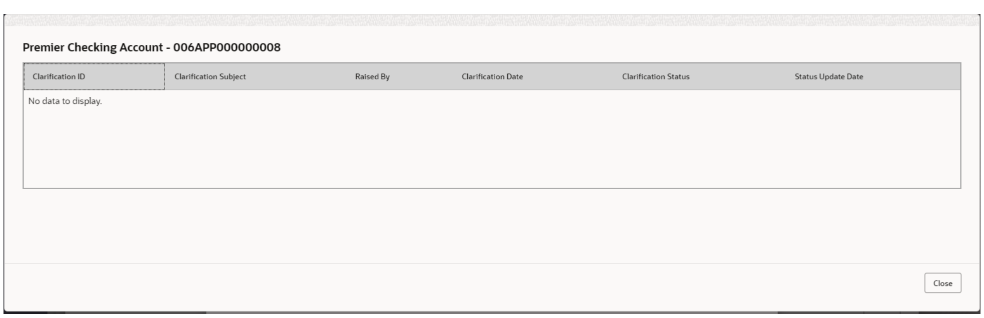
Figure 1-4 Data Points



6. Click on **More Info** hyperlink.

   The **More Info** pop-up displays.

Figure 1-5 More Info



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

Table 1-4 Clarification Details – Field Description

Field	Description
Clarification	Displays the subject of the requested clarification.
Raised By	Displays the user id of the user who raised the clarification request.
Clarification Date	Displays the clarification date on which the request was raised.
Response Type	Displays the response type.
Clarification Status	Displays the status of clarification. The available options are: • **Clarification Requested** • **Clarification Withdrawn** • **Clarification Completed**
Status Update Date	Displays the date on which status was updated.
New Clarification	Click **New Clarification** to raise a new clarification request.

7. Select any specific clarification request row.

   The **Clarification Details** for the selected clarification request displays.
   The **Clarification Details** screen displays details about the specific customer clarification request raised.

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

Table 1-5 Clarification Details – Field Description

Field	Description
Clarification ID	Displays the unique clarification ID.
Clarification Subject	Displays the subject of clarification request.
Raised By	Displays the user id of the user who has raised the clarification request.
Clarification Date	Displays the clarification date.
Status	Displays the status of clarification.
Status Update Date	Displays the date on which status was updated.
New Conversation	Click **New Conversation** to raise conversation for the selected clarification request. The System also allows to view and update the conversation from the **My Application** and **Application Search** dashboard by clicking **More Info** hyperlink from the Product card. If the new conversation is updated by any other user, instead of the user who initially raised the clarification request; a bell notification will be sent to the user who has raised the request. The available options are: • **Save and Close**: Click **Save and Close** to save the conversation. • **Cancel**: Click **Cancel** to cancel the conversation update.

Table 1-5 (Cont.) Clarification Details – Field Description

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Withdraw Clarification</td><td>Click Withdraw Clarification to withdraw and close the selected clarification request. Updating the clarification details is mandatory to withdraw the clarification. User can update the reason why the clarification is being withdrawn and can also upload any document if needed.
The available options are:
Save and Close: Click Save and Close to withdraw the clarification.
Cancel: Click Cancel to withdraw the clarification action.
Note:
The Withdraw Clarification displays, if the Clarification request was raised by the same user. For others, New Conversation is available, which can be used to update conversations on the specified Clarification ID.</td></tr>
<tr><td>Accept Clarification</td><td>Click Accept Clarification to close the clarification raised. Updating the clarification details is mandatory to accept the clarification. User can update the detail of why the clarification is being accepted and can also upload any document if needed.
Once the clarification request is accepted, no further conversation can be raised on the Clarification ID. Also, the application status will change to My Task.
The available options are:
Save and Close: Click Save and Close to accept the clarification.
Cancel: Click Cancel to cancel the withdrawal clarification action.
Note:
The Accept Clarification displays, if the Clarification request was raised by the same user. For others, only New Conversation is available, which can be used to update conversations on the specified Clarification ID.</td></tr>
</table>

Note:

- System sends an e-mail notification to the customer for clarification requests raised for an application.
- Additionally, Bell Notification is sent to the user who had raised the request, whenever a conversation is raised for the **Clarification Request**.

1.2 Application Search

This topic describes systematic instructions to view Application Search dashboard.

The **Application Search** dashboard allows the user to enquire an application through the various search criteria based on the following:

- **Application Number**
- **Customer Name**
- **CIF**
- **Mobile Number**
- **E-mail ID**

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

1. On **Home** screen, click **Dashboard**.

   The **Application Search** dashboard displays in **Dashboard** screen.

   Figure 1-6 Application Search

2. Click **Search** icon.

   It allows to view the application list and allows further drill-down to view the application details.
   Please refer **My Application** to know more about the **All Applications Drill-Down** screen and **Application Details Drill-Down** screen.

1.3 Conversion Analysis

This topic describes systematic instructions to view Conversion Analysis dashboard.

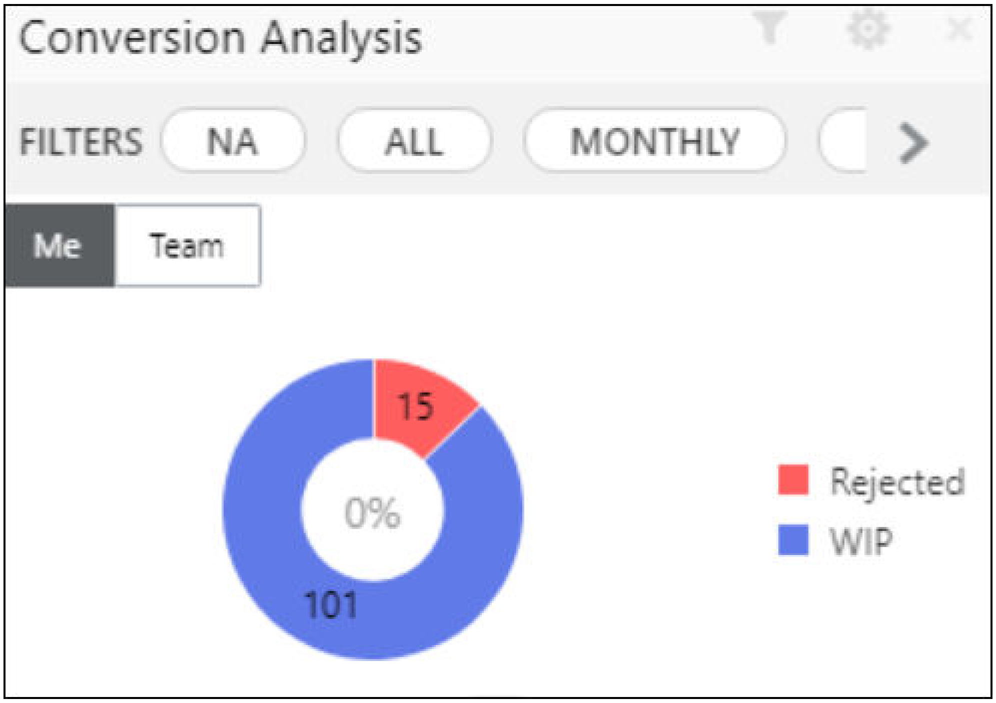
The **Loan Offer Status** dashboard allows the logged-in bank user to view the details of the conversion for the various products originated by them.

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

1. On **Home** screen, click **Dashboard**.

   The **Conversion Analysis** dashboard displays in **Dashboard** screen.

Figure 1-7 Conversion Analysis



2. Click **Filter** icon to filter the data.

   The available options are:

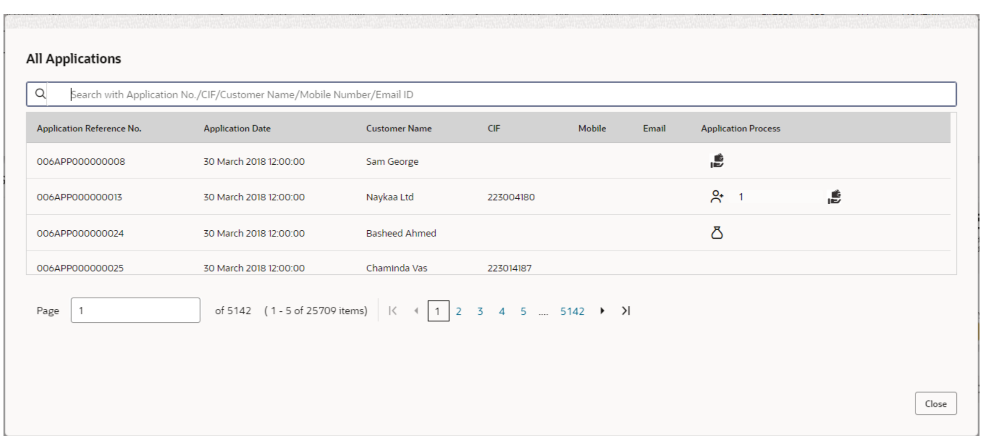
   - **Products**
   - **Period**

   By default, the system displays the month-wise conversion details of all the products originated for the current month. This dashboard provides bifurcations across **Work-In-Progress (WIP)**, **Completed**, and **Rejected** for the products originated.

3. Click on hyper-linked number.

   The **All Applications** screen displays.

Figure 1-8 All Applications Drill-Down



The **All Applications** screen displays the list of various applications for the selected Conversion Status

The All Applications Drill-Down screen displays the list of various applications for the selected Conversion Status. Refer **My Application** , to read more about the All Applications Drill-Down screen and Application Details Drill-Down screen.

1.4 Account Opening Trends

This topic describes about the various account opening trends in Oracle Banking Origination.

This topic contains the following subtopics:

- New Savings Account
  This topic describes systematic instructions to view New Savings Account dashboard.
- New Current Account
  This topic describes systematic instructions to view New Current Account dashboard.
- New Loan Account
  This topic describes systematic instructions to view New Loan Account dashboard.
- New Term Deposits
  This topic describes systematic instructions to view New Term Deposit dashboard.
- New Credit Cards
  This topic describes systematic instructions to view New Credit Cards dashboard.

1.4.1 New Savings Account

This topic describes systematic instructions to view New Savings Account dashboard.

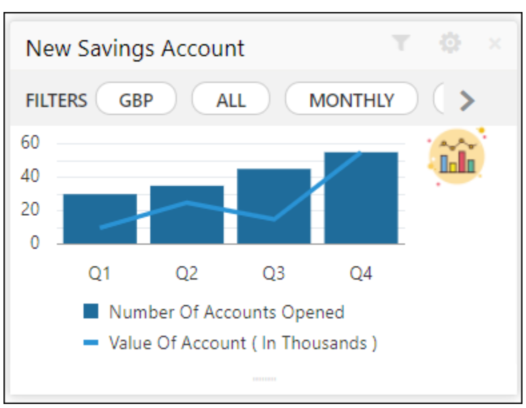
The **New Savings Account** dashboard allows the logged-in bank user to view the trend of the savings account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Savings Account** dashboard displays in **Dashboard** screen.

   Figure 1-9 New Savings Account

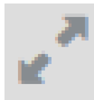
   

2. Click **Filter** icon to filter the data.

   The available options are:

- **Currency**
- **Period**

By default, the system displays month-wise trend of the savings account opened.

3. Click  icon to change the chart type.
4. Click  icon to expand the dashboard.

1.4.2 New Current Account

This topic describes systematic instructions to view New Current Account dashboard.

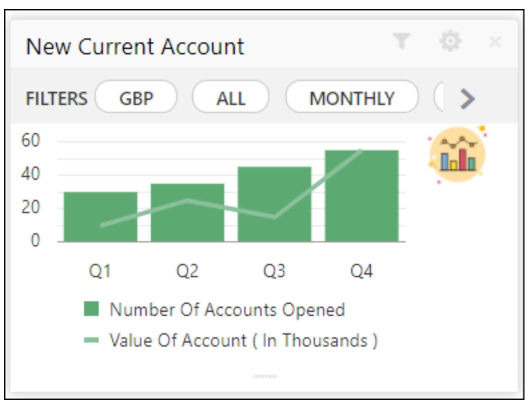
The **New Current Account** dashboard allows the logged-in bank user to view the trend of the current account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Current Account** dashboard displays in **Dashboard** screen.

Figure 1-10 New Current Account

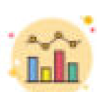
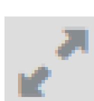


2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Period**

   By default, the system displays month-wise trend of the current account opened.

3. Click  icon to change the chart type.
4. Click  icon to expand the dashboard.

1.4.3 New Loan Account

This topic describes systematic instructions to view New Loan Account dashboard.

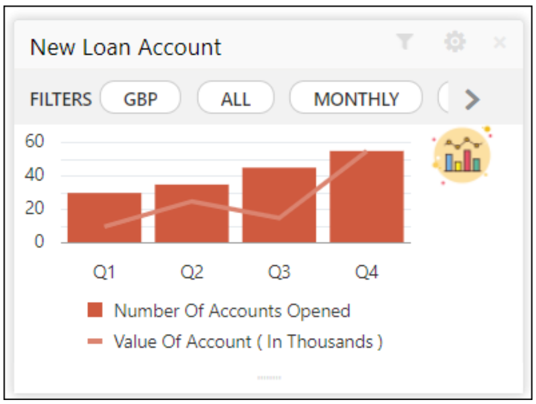
The **New Loan Account** dashboard allows the logged-in bank user to view the trend of the loan account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Loan Account** dashboard displays in **Dashboard** screen.

   Figure 1-11 New Loan Account

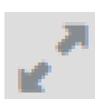
2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Period**

   By default, the system displays month-wise trend of the loan account opened.

3. Click  icon to change the chart type.

4. Click  icon to expand the dashboard.

1.4.4 New Term Deposits

This topic describes systematic instructions to view New Term Deposit dashboard.

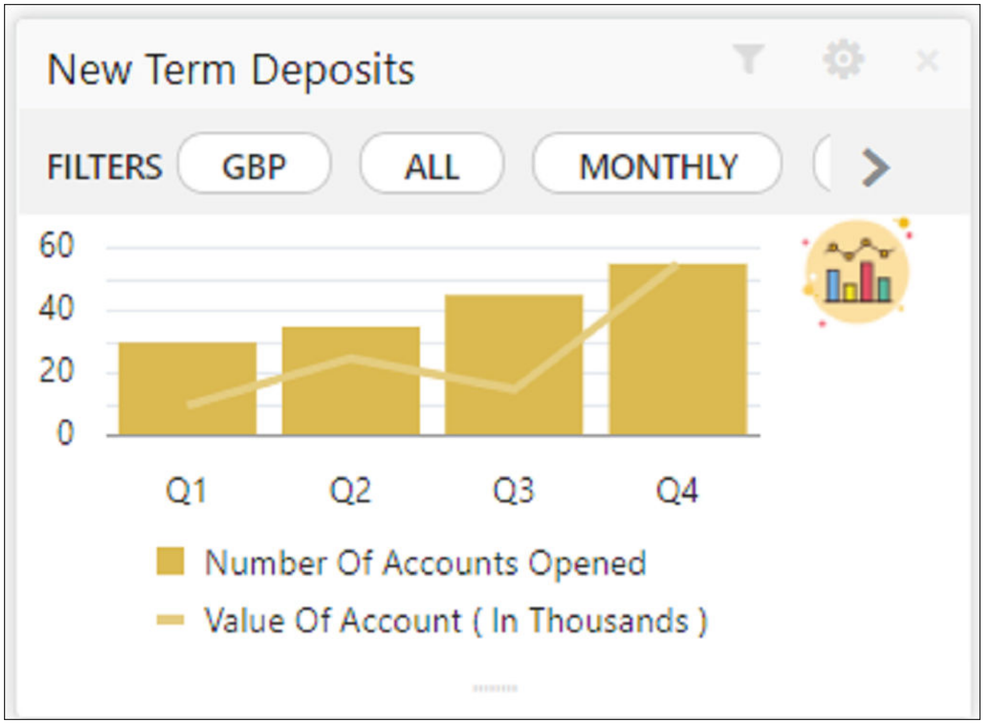
The **New Term Deposits** dashboard allows the logged-in bank user to view the trend of the term deposit account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Term Deposits** dashboard displays in **Dashboard** screen.

Figure 1-12 New Term Deposits



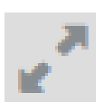
2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Period**

   By default, the system displays month-wise trend of the term deposit account opened.

3. Click  icon to change the chart type.

4. Click  icon to expand the dashboard.

1.4.5 New Credit Cards

This topic describes systematic instructions to view New Credit Cards dashboard.

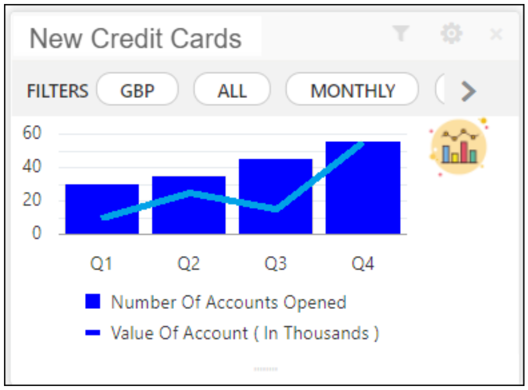
The **New Credit Cards** dashboard allows the logged-in bank user to view the trend of the credit card account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Credit Cards** dashboard displays in **Dashboard** screen.

Figure 1-13   New Credit Cards



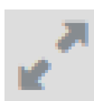
2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Period**

   By default, the system displays month-wise trend of the credit card account opened.

3. Click  icon to change the chart type.

4. Click  icon to expand the dashboard.

1.5 Loan Pipeline

This topic describes systematic instructions to display Loan Pipeline dashboard.

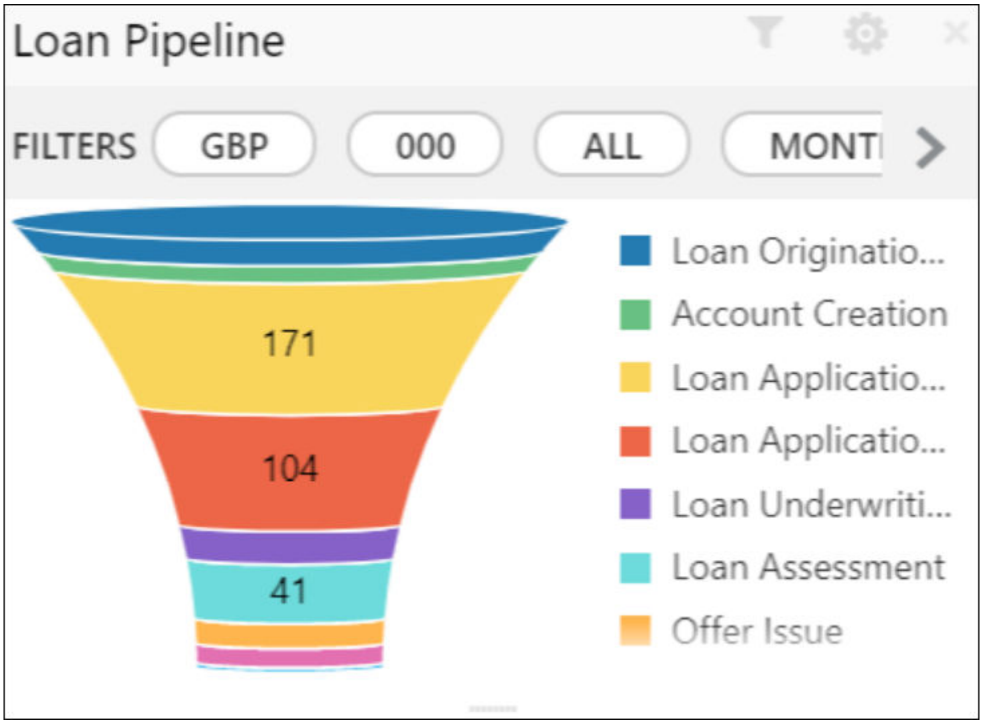
The **Loan Pipeline** dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the stage-wise details of the loans for their branch.

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

1. On **Home** screen, click **Dashboard**.

   The **Loan Pipeline** dashboard displays on **Dashboard** screen.

Figure 1-14 Loan Pipeline



2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Sub-Products**
   - **Period**

   By default, the system displays the stage-wise details of the loans of the logged-in user for the current month.

1.6 Loan Offer Status

This topic describes systematic instructions to view Loan Offer Status dashboard.

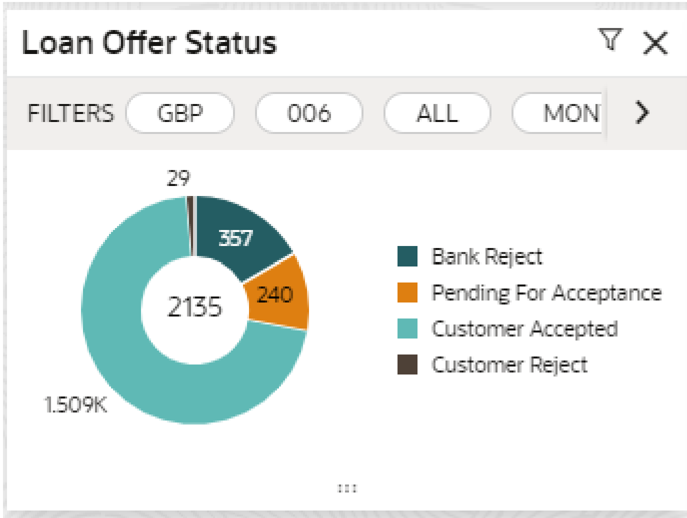
The **Loan Offer Status** dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the status of the loans for which offers have been made for their branch.

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

1. On **Home** screen, click **Dashboard**.

   The **Loan Offer Status** dashboard displays in **Dashboard** screen.

Figure 1-15 Loan Offer



In a doughnut chart, the dashboard reveals the numbers and the value of the loan offers for the below mentioned status:

- **Pending for Acceptance**
- **Customer Accepted**
- **Customer Reject**
- **Bank Reject**

2. Click **Filter** icon to filter the data.

   The available options are:

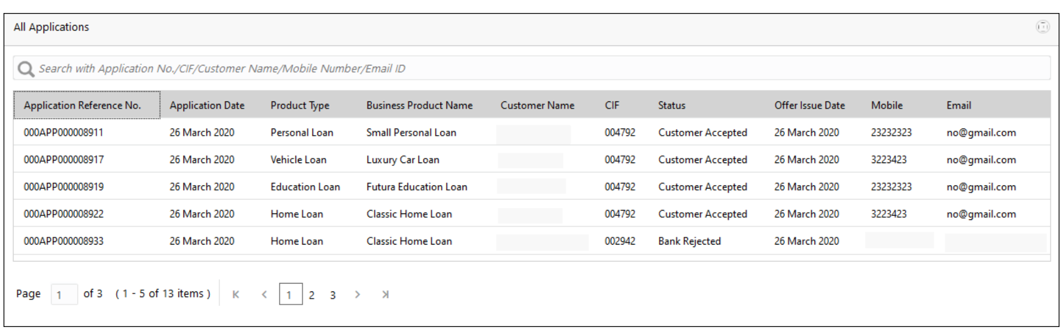
   - **Currency**
   - **Period**

   By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

3. Click on hyper-linked number.

   The **All Applications** screen displays.

Figure 1-16 All Applications



All Applications

Search with Application No./CIF/Customer Name/Mobile Number/Email ID

Application Reference No.	Application Date	Product Type	Business Product Name	Customer Name	CIF	Status	Offer Issue Date	Mobile	Email
000APP000008911	26 March 2020	Personal Loan	Small Personal Loan		004792	Customer Accepted	26 March 2020	23232323	no@gmail.com
000APP000008917	26 March 2020	Vehicle Loan	Luxury Car Loan		004792	Customer Accepted	26 March 2020	3223423	no@gmail.com
000APP000008919	26 March 2020	Education Loan	Futura Education Loan		004792	Customer Accepted	26 March 2020	23232323	no@gmail.com
000APP000008922	26 March 2020	Home Loan	Classic Home Loan		004792	Customer Accepted	26 March 2020	3223423	no@gmail.com
000APP000008933	26 March 2020	Home Loan	Classic Home Loan		002942	Bank Rejected	26 March 2020		

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The **All Applications** screen displays the list of various Loan applications.

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

Table 1-6 All Applications – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Type	Displays the sub-product type.
Business Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Status	Displays the status of the application.
Offer Issue Date	Displays the offer issue date.
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

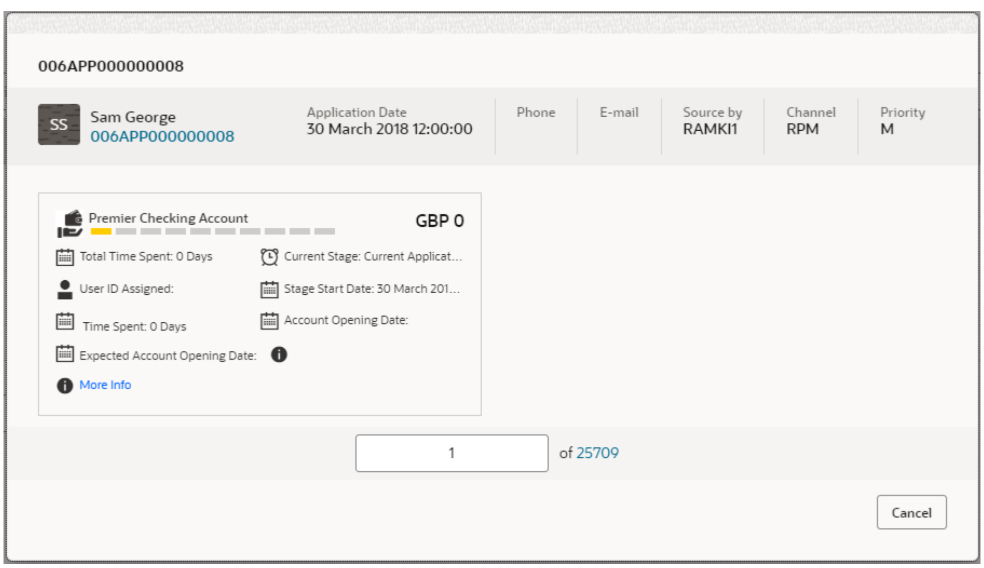
The user can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

4. Click the specific application row to view more details about the application.

   The **Application Information** screen displays.

Figure 1-17 Application Details Drill-Down



The **Application Information** screen displays separate cards for various products initiated as part of the application.

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

Table 1-7 Application Information – Field Description

Field	Description
Application Number	Displays the application number.
Application Date	Displays the application date.
Phone	Displays the phone number.
E-mail	Displays the E-mail ID.
Source By	Displays the username who has sourced the application.
Channel	Displays the channel name.
Priority	Displays the priority of the application. • **High** • **Medium** • **Low**
Product Name	Displays the product name of the application.
Stage Bar	Indicates the current stage of the application.
Account Number	Displays the HOST account number. **NOTE:** This field displays once all the stages are completed for the application and the account is created in Host.
Total time spent	Displays the time spent for the product process since initiation of the application.
User ID Assigned	Displays the **User ID** of the user currently working on the product process. **NOTE:** This is blank in case the product process task is not acquired by any user.
Time spent	Displays the days spent in the current phase/stage.
Current Stage	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the current stage is displayed as current phase.
Stage Start Date	Displays the stage in which the product process is currently in. **NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date.
Account Opening Date	Displays the account opening date.
Expected Account Opening Date	Displays the expected account opening date.
Figure 1-18 More Info 	Displays the information on the features considered to predict the expected account opening date.
More Info	Click **More Info** hyperlink to view more details about the customer clarification raised.

1.7 Loan Exposure to Collateral

This topic describes systematic instructions to view Loan Exposure to Collateral dashboard.

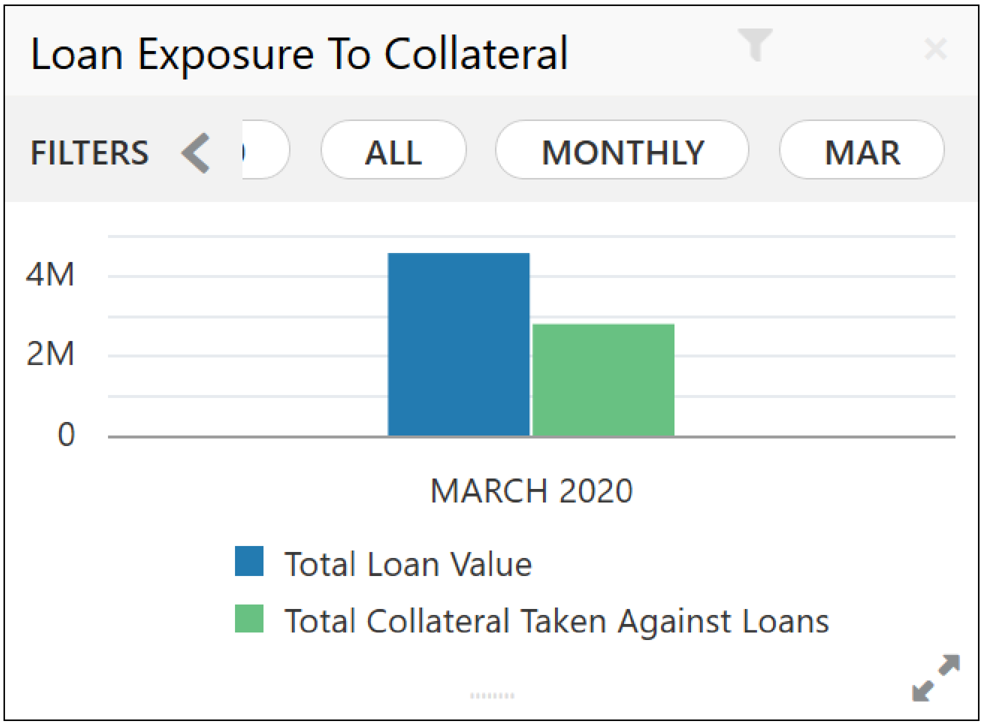
The **Loan Exposure to Collateral** dashboard allows the logged-in bank user who could be a Lending Head to view the collateral available against the Loans Exposures for their Branch.

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

1. On **Home** screen, click **Dashboard**.

   The **Loan Exposure to Collateral** dashboard displays in **Dashboard** screen.

   Figure 1-19 Loan Exposure to Collateral

   This dashboard displays the **Loan Exposure Value** against the **Collateral Value**.

2. Click **Filter** icon to filter the data.

   The available options are:

   - **Currency**
   - **Sub-Products**
   - **Period**

   By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

1.8 Product Application Near Expiry

This topic describes systematic instructions to view Product Application Near Expiry dashboard.

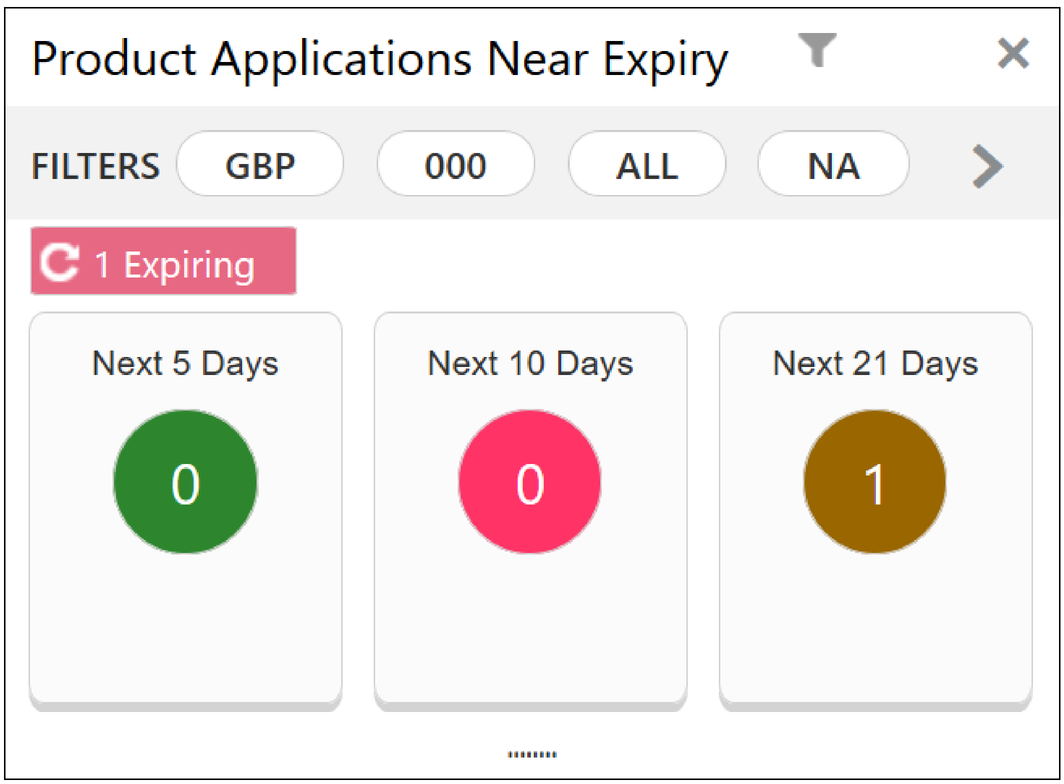
The **Product Application Near Expiry** dashboard allows the logged-in bank user to view the details of applications which are nearing to expiry date.

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

1. On **Home** screen, click **Dashboard**.

   The **Product Application Near Expiry** dashboard displays in **Dashboard** screen.

   Figure 1-20 Product Application Near Expiry

2. Click **Filter** icon to filter the data.

   The available options are:

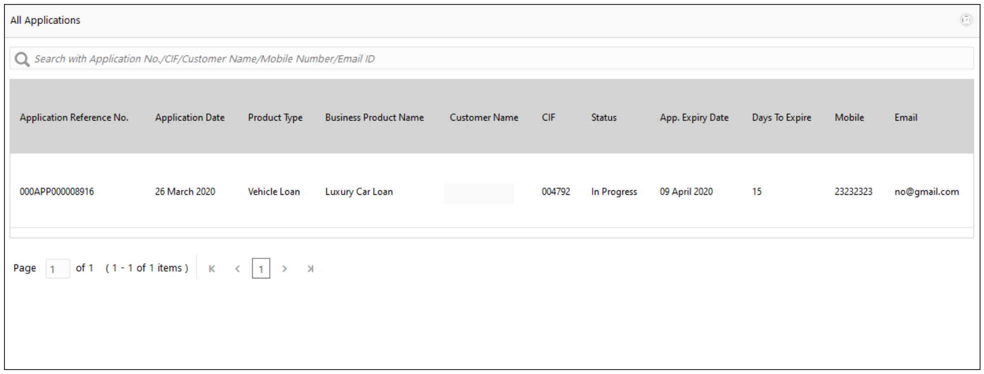
   - **Currency**
   - **Branch**
   - **Users**
   - **Products**
   - **Sub-Products**

   By default, the system displays the details of all the products, the base currency and the branch of the logged-in user.

3. Click on hyper-linked number.

   The **All Applications** screen displays.

Figure 1-21 All Applications



The **All Applications** screen displays the list of various applications.

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

Table 1-8 All Applications – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Type	Displays the sub-product type.
Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Status	Displays the status of the application.
App. Expiry Date	Displays the application expiry date.
Days to Expire	Displays the total days to expire.
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

The user can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

1.9 Loan Offers Near Expiry

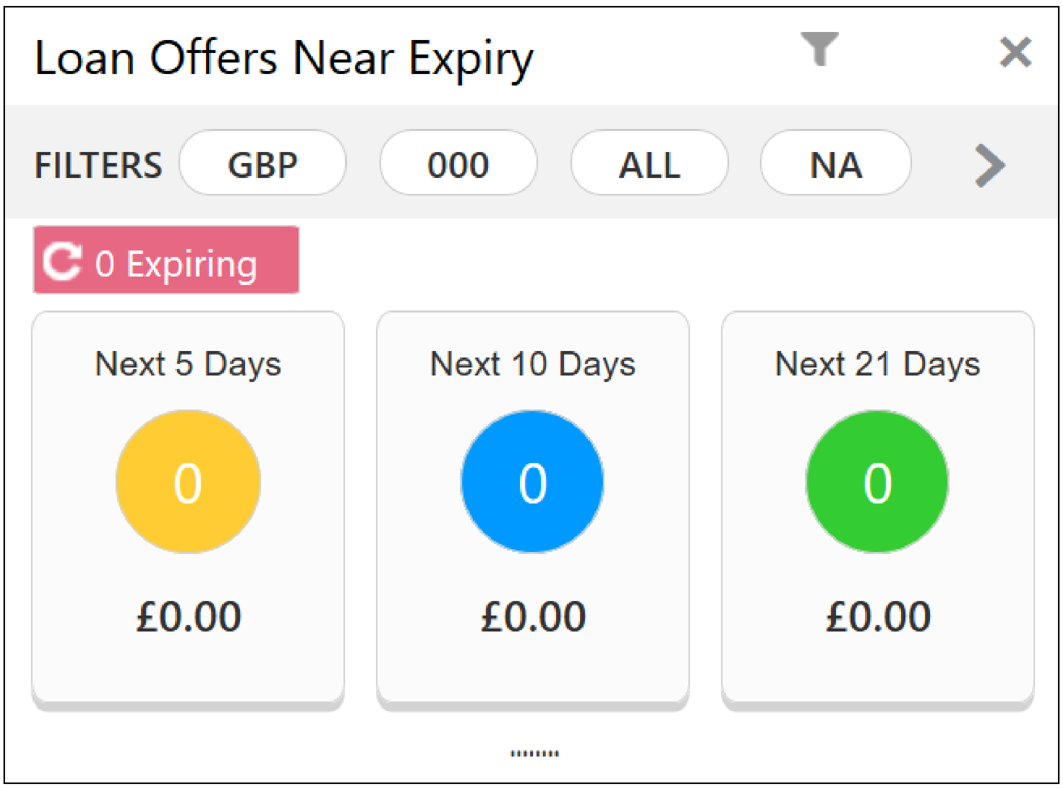
This topic describes systematic instructions to view Loan Offers Near Expiry dashboard.

The **Loan Offers Near Expiry** dashboard allows the logged-in bank user, who could be a Relationship Manager, Loan Officer or Loan Head, to view the details of loan offers which are nearing to expiry date.

1. On **Home** screen, click **Dashboard**.

   The **Loan Offers Near Expiry** dashboard displays in **Dashboard** screen.

   Figure 1-22 Loan Offers Near Expiry

2. Click **Filter** icon to filter the data.

   The available options are:

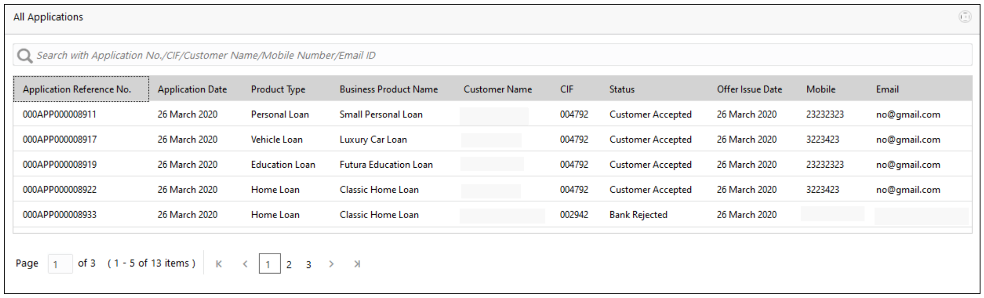
   - **Currency**
   - **Branch**
   - **Users**
   - **Sub-Products**

   By default, the system displays the details of all the loan offers for the logged-in user and their team, and the base currency of the branch.

3. Click on hyper-linked number.

   The **All Applications** screen displays.

Figure 1-23 Loan Offers Near Expiry Drill-Down



The **All Applications** screen displays the list of various loan offers for the selected Loan offer status.

Table 1-9 All Applications – Field Description

Field	Description
Application Reference No.	Displays the application reference number.
Application Date	Displays the application date.
Product Sub-Type	Displays the product sub-type.
Product Name	Displays the product name.
Customer Name	Displays the customer name.
CIF	Displays the CIF.
Status	Displays the status of the application.
Offer Issue Date	Displays the offer issue date.
App. Expiry Date	Displays the application expiry date
Days to Expire	Displays the total days to expire.
Mobile	Displays the mobile number.
E-mail	Displays the E-mail ID.

The user can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **E-mail ID**

1.10 SLA Status Summary

This topic describes systematic instructions to view SLA Status Summary dashboard.

The SLA status widget is available in the Dashboard and is accessible as per user credentials. The Widget displays the SLA status maintained at the process level. The Widget displays only those tasks that are not being handed off to the Back Office system.

Click the right arrow on the widget to view the SLA widget in graphical chart (doughnut chart) as well as in tabular form.

The SLA Status Widget highlights the tasks that are **Within SLA** (in green), **Nearing SLA breach** (in amber) and **breached SLA** (in red)

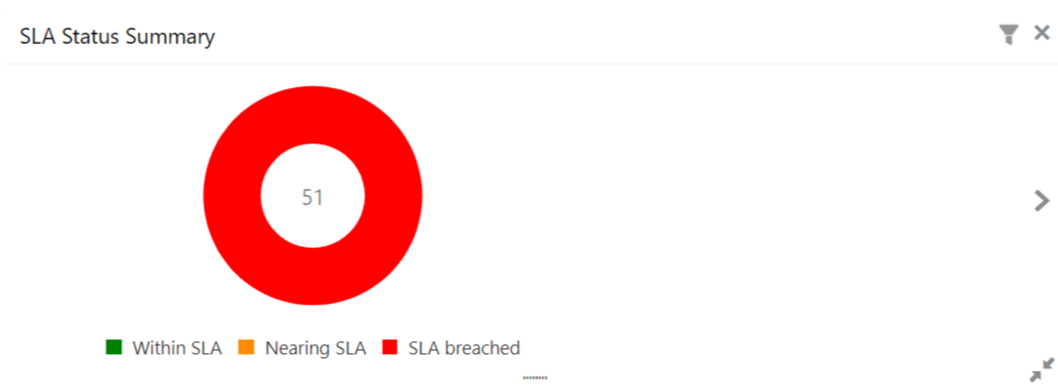
The **SLA Status Summary** dashboard allows the logged-in bank user to view the details of the SLA Status for the various products originated by them.

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

1. On **Home** screen, click **Dashboard**.

   The **SLA Status Summary - Graphical View** dashboard displays in **Dashboard** screen.

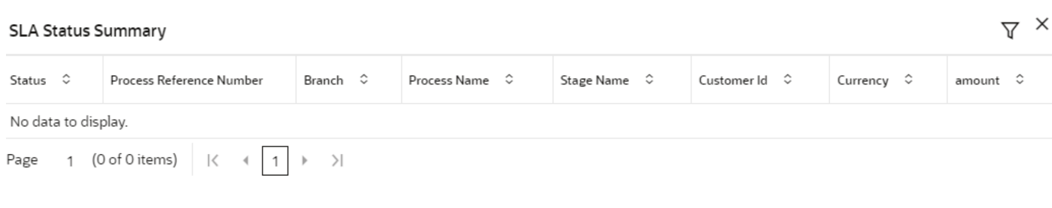
Figure 1-24 SLA Status Summary - Graphical View



2. Click icon to view the SLA status summary in Tabular view.

   The **SLA Status Summary - Tabular view** dashboard displays in **Dashboard** screen.

Figure 1-25 SLA Status Summary - Tabular View



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

Table 1-10 SLA Status Summary – Field Description

Field	Description
Status	Displays the SLA Status.
Process Reference Number	Displays the Process Reference Number.
Branch	Displays the Branch.

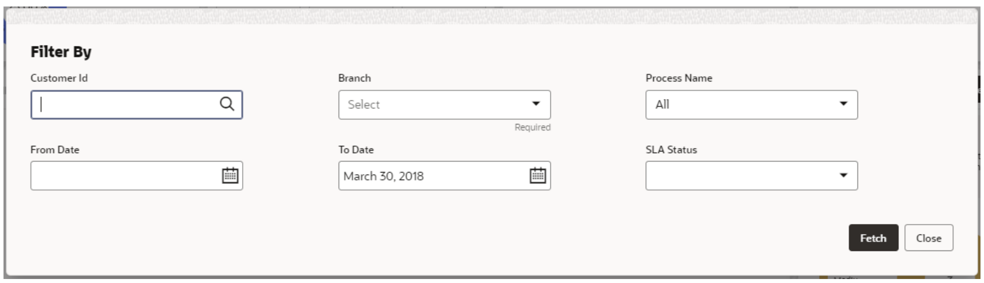
Table 1-10 (Cont.) SLA Status Summary – Field Description

Field	Description
Process Name	Displays the Process Name
Stage Name	Displays the Stage Name.
Customer ID	Displays the Customer Id.
Currency	Displays the Currency.
Amount	Displays the Amount.

3. Click **Filter** icon to filter the data.

   The **Filter by** screen displays.

Figure 1-26 Filter By



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

Table 1-11 Filter By – Field Description

Field	Description
Customer Id	Click **Search** icon and select the Customer Id from the list
Branch	Select the required Branch Code & Name from the drop-down list.
Process Name	Select the process name.
From Date	Select the date from when the SLA information needs to be fetched.
To Date	Select the date till when SLA information needs to be fetched. **Note:** By default branch date will be shown.
SLA Status	Select the **SLA Status** from the drop-down list. The available options are: • **Within SLA** • **nearBreach** • **breached**

2 Alerts

This topic provides information about alerts.

Oracle Banking Origination supports alert to the external customers, and to the internal users for specified actions. The bank customers may require critical information on their applications to help them take appropriate actions. The bank staff may also require certain information on the customer applications that they may have initiated or have been working on. A business alert is a message that conveys such information by e-mail to the external customer or by bell notification to the internal application users.

Oracle Banking Origination generates business alerts for the bank staff as well as bank customers. The alerts are generated to the customers and staff at specified events.

This topic contains the following subtopics:

Events triggering E-mail Notifications to the customer

Below mentioned events in the Application Processing, triggers e-mail notification to the customer:

- Offer Issue
  On submit of the **Offer Issue** stage, the system triggers an e-mail notification with the Offer Document to the e-mail IDs of the customers.
- Clarification Request
  If Clarification request is raised for an application, system triggers an e-mail notification with the clarification details to the e-mail IDs of the customers.

The E-mail notification are sent to the customer’s e-mail ID from the configured bank user ID in the Property table. The e-mail template can include the login link to the Digital Banking website maintained in the Property table so that customer is re-directed to the Bank’s Digital Banking login page and take required action on the notification raised.

Events triggering Bell Notification to the internal application user

Below mentioned events in the Application Processing trigger bell notification to the internal users:

- Action on Offer Issued from digital channel by the customer
  The possible actions that the customer can take on the offer issued to them from Digital channel are Accept, Reject or Amend. Once the customer takes an action from the digital channel, system raises bell notification to user who has initiated the application.
- Manual Conversation updated for Clarification Request
  If any conversation is updated manually by internal application user on the clarification request raised, system triggers a bell notification to the user who has raised the request. This allows the user to take immediate action on the response received for the clarification request.

A

Error Code and Messages

This topic contains the error codes and messages.

Table A-1 Error Codes and Messages

Error Code	Messages
RPM-AT-003	Failed to fetch user hierarchy information from sms-core-services
RPM-CMN-001	Exception Occurred while Executing Query
RPM-CMN-002	Number format exception
RPM-CMN-003	Server Error Occurred during API call
RPM-CMN-004	Illegal State Exception
RPM-CMN-005	JTA Transaction unexpectedly rolled back
RPM-CMN-006	Exception Occurred while creating Bean
RPM-CMN-007	Internal server error occurred
RPM-CMN-009	InValid date format
RPM-CMN-010	toDate is greater than fromDate
RPM-COM-001	JSONException Occured
RPM-DB-001	Error occured in Dashboard Util
RPM-DB-002	Error while getting reportees
RPM-DB-003	Error occured while getting current Half year
RPM-DB-004	Error occured while getting current Quarter
RPM-DB-005	Error occured while fetching Dashboard data from DB
RPM-DS-030	Could not resolve the filter criteria
RPM-MN-001	Error while fetching $1 from maintenance table

B

Functional Activity Code

This topic contains the functional activity codes.

Table B-1 Functional Activity Code

Screen Name	Functional Activity Code
Account Opening Trends	RPM_FA_PROCESS_DRIVER_Dashboard_ACCOUNT_OPENING_TREND
Application Search	RPM_FA_WD_MY_SEARCH
Conversion Analysis	RPM_FA_PROCESS_DRIVER_Dashboard_CONVERSION_ANALYSIS
Loan Exposure to Collateral	RPM_FA_PROCESS_DRIVER_Dashboard_COLLATERAL
Loan Offers Near Expiry	RPM_FA_WD_MY_LOAN_EXPIRY
Loan Offer Status	RPM_FA_PROCESS_DRIVER_Dashboard_LOAN_OFFER_STATUS
Loan Pipeline	RPM_FA_PROCESS_DRIVER_Dashboard_PARKEDLOAN
My Applications	RPM_FA_DASHBOARD_MY_APPLICATIONS
My Applications	RPM_FA_PROCESS_DRIVER_Dashboard_MY_APPLICATION
Product Application Near Expiry	RPM_FA_WD_MY_PRODUCT_EXPIRY

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