

# Oracle® Banking Origination

## Alerts and Dashboards User Guide (US Regionalization)



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ORACLE®

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# Preface

This topic contains the following sub-topics:

- [Purpose](#)
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## Purpose

This guide is designed to help you to quickly get acquainted with the Oracle Banking Origination system. This guide provides an overview on the **Dashboard** widgets and **Alerts** available in Oracle Banking Origination and guides user through the various features in dashboards and notifications can are available respectively. This guide helps you conveniently make use of dashboards.

## Before you begin

Kindly refers to [Getting Started user Guide](#) for common elements, including Symbols and Icons, Conventions Definitions, and so forth.

## Pre-requisite

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

## 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

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### Access to Oracle Support

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## 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](#).

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Related Resources

For more information, refer to the following document:

*Configuration User Guide*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which user supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that user enter.

## 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.

## 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

## Symbol and Icons

**Table 2 Symbols and Icons - Common**












Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list

Table 2 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Add a new record
	Navigate to the previous record
	Navigate to the next record
	Refresh
	Calendar
	Alerts

## Post requisite

After finishing all the requirements, please log out from the Home screen.



# 1

## Dashboards

This topic provides the information about the Dashboards 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, Checking Account, Certificate of 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 widget.
- [Application Search](#)  
This topic describes systematic instructions to view Application Search dashboard.

- [Conversion Analysis](#)  
This topic provides the systematic instructions to view Conversion Analysis widget.
- [Account Opening Trends](#)  
This topic describes systematic instructions to view Account opening trend widget.
- [Stage Wise Details](#)  
This topic describes the systematic instructions to display Stage Wise Details widget.
- [Loan Offer Status](#)  
This topic describes systematic instructions to view Loan Offer Status widget.
- [Loan Exposure to Collateral](#)  
This topic describes systematic instructions to view Loan Exposure to Collateral widget.
- [Applications Nearing Expiration](#)  
This topic describes systematic instructions to view Applications Nearing Expiration widget.
- [Loan Offers Nearing Expiration](#)  
This topic describes systematic instructions to view Loan Offers Nearing Expiration widget.
- [SLA Status Summary](#)  
This topic describes systematic instructions to view SLA Status Summary widget.

## 1.1 My Applications

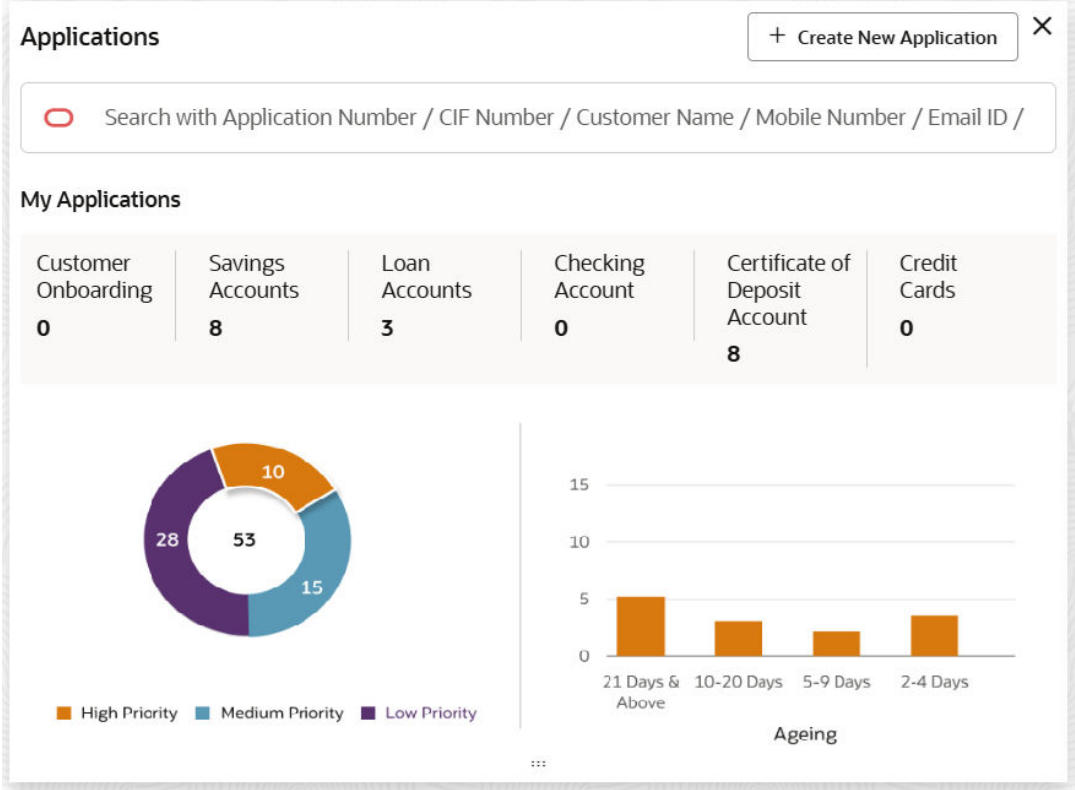
This topic describes systematic instructions to view My Applications widget.

A bank user who is logged in, including roles such as Relationship Manager, Sales Manager, or Loan Officer, has the ability to access the details of applications they have initiated through the **Application** dashboard.

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

The **Applications** widget displays in **Dashboard** screen.

Figure 1-1 My Application



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.
Savings Accounts	Displays the total number of Savings Account requests initiated.
Loan Accounts	Displays the total number of Loan Account requests initiated.
Checking Accounts	The application displays the total number of Checking Account requests initiated.
Certificate of Deposits	The application displays the total number of Certificate of Deposits requests initiated.
Credit Cards	The application displays the total number of Credit Card requests initiated.

The **Pie chart** presents the overall count of applications initiated by the user, organized according to the priority assigned to each application at the time of initiation.

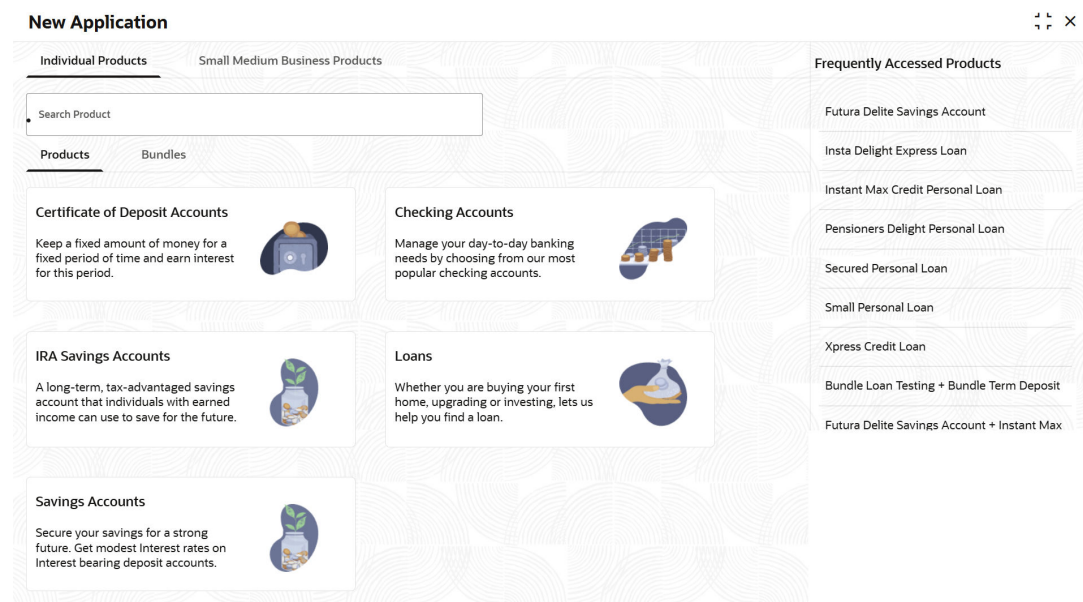
The available priorities are:

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

2. Click **+ Create New Application**.

The **New Application** screen displays with the products.

**Figure 1-2 New Application - Products**



For more information on this screen, refer to the **Operations User Guide**.

3. Hover on the pie chart split for the specific priority and click it.

The right side screen displays the number for the specified selected priority, with applications split into various age buckets as described below.

- **2-4 Days**
- **5-9 Days**
- **10-20 Days**
- **21 Days and Above**

User can drill down and view the application list by clicking the hyperlinks on the displayed numbers.

4. Click on hyperlinked number inside the pie chart.

The **All Applications** screen displays.

**Figure 1-3 All Applications**

Application Number	Application Date	Customer Name	CIF Number	Mobile	Email	Unique ID	National ID	Appl Proc
006APP000155221	March 30, 2018 at 10:28:54 AM	SMB Ind20240809112021	HEL004792					
006APP000155663	March 30, 2018 at 5:40:16 AM	SKR Enterprises			sivadas.r@oracle.com			
006APP000156493	March 30, 2018 at 7:33:06 AM	Plantation Corporation	HEL005153					
006APP000156494	March 30, 2018 at 7:37:22 AM	SMB Enterprises						
006APP000156500	March 30, 2018 at 9:09:10 AM	SM Agencies			krsivadas@yahoo.co.in			
006APP000159402	March 30, 2018 at 11:53:24 AM	Mr. Brett G Dalton JR	006016104	1783499220	krishnadas.r.pai@oracle.com	US894894	US894894	

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**

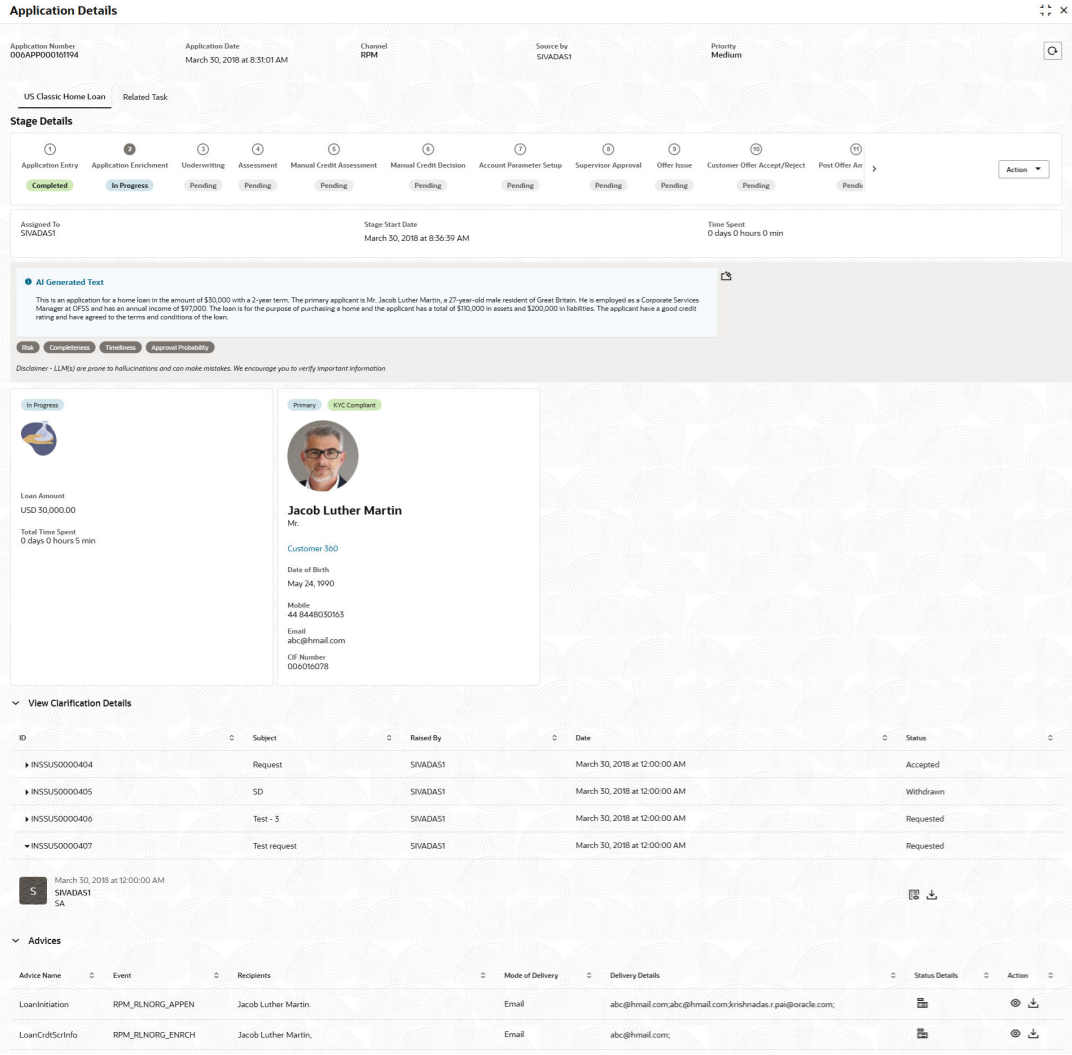
Field	Description
<b>Application Number</b>	Displays the application reference number.
<b>Application Date</b>	Displays the application date.
<b>Customer Name</b>	Displays the customer name.
<b>CIF Number</b>	Displays the CIF number.
<b>Mobile</b>	Displays the mobile number.
<b>Email</b>	Displays the e-mail ID.
<b>Unique ID</b>	Displays the unique ID of the customer.
<b>National ID</b>	Displays the national ID of the customer.
<b>Application Process</b>	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 Number**
  - **Customer Name**
  - **Mobile Number**
  - **Email ID**
5. Click on an application row to view more details about the application.

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

Figure 1-4 Application Details



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 Number	Displays the application number.
Application Date	Displays the date and time on which the application was initiated.
Channel	Displays the channel name.
Source By	Displays the name of the user who has sourced the application.
Priority	Displays the priority of the application. <ul style="list-style-type: none"><li>High</li><li>Medium</li><li>Low</li></ul>

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



Field	Description
<b>Refresh</b>	Click  to retrieve recent changes or updates made to the application.
<b>Go To</b>	Select an option from the drop-down list to view the application flow. <ul style="list-style-type: none"> <li><b>Simulation</b></li> </ul>
<b>&lt;Product Name&gt;</b>	Displays the product name. In case on multiple product, different tabs appears with the respective product name. User can click the product names to view the respective application details.
<b>Stage Details</b>	In this section, all account opening stages appears with the status name and it's chronological order of the stage in the process.
<b>Action</b>	To perform below actions on the appeared stages, click the number of specific stage and select an option from the <b>Action</b> drop-down list: <ul style="list-style-type: none"> <li><b>Acquire &amp; Edit Task</b> : Select this option to acquire and edit the selected stage.</li> <li><b>Acquire Task</b>: Select this option to acquire the selected stage and it can be edited later.</li> <li><b>View Stage Details</b>: Select this option to view the stage details.</li> </ul>
<b>User ID Assigned</b>	Displays the <b>User ID</b> of the user currently working on the product process. The label of this field changes dynamically based on whether the selected stage is <b>In Progress</b> or <b>Completed</b> . <ul style="list-style-type: none"> <li>When user selects a <b>In Progress</b> stage, the label will display as <b>Assigned To</b>.</li> <li>When user selects a <b>Completed</b> stage, the label will display as <b>Submitted By</b>. If the task was auto submitted, then the value for such Completed stages will be displayed as <b>Auto Submitted</b>.</li> <li>For Pending and skipped stages, this field will be hidden.</li> </ul> <b>Note:</b> This field value appears blank if the product process task is not acquired by any user.
<b>Stage Start Date</b>	Displays the start date of the current stage. It also display time in hours, minutes and seconds.
<b>Time spent</b>	Displays the days, hours and minutes spent on the current selected stage.
<b>AI Generated Text</b>	Displays the AI generated description of the product. This section appears if the <b>Enable AI</b> toggle is selected in the <b>Origination Preferences</b> screen. This section also describes the product insights such as <b>Risk</b> , <b>Completeness</b> , <b>Timelines</b> , and <b>Approval Probability</b> . This data is generated analyzed based on captured application details. This content is populated as configured in Large Language Model.
	Click this icon to view the source of information in the context of the response given by Large Language Model. This icon displays when the <b>AI for Application Tracker</b> feature is enabled in the <b>Origination Preferences</b> screen.




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

Field	Description
<Application Tile>	<p>In this tile, user can view the application specific details. Below field appears in this tile with respective details:</p> <ul style="list-style-type: none"> <li>• <b>&lt;Status of the Application&gt;</b>: Displays the current stage of the application</li> <li>• <b>Expected Account Opening Date</b>: Displays the date on which the account is opened. This field appears once the account opening process is completed.</li> <li>• <b>Account Number</b>: Displays the account number. This field appears once the account opening process is completed.</li> <li>• <b>Expected Account Opening Date</b>: Displays the date on which the account will be opened.</li> <li>• <b>&lt;Amount&gt;</b>: Displays the value based on the product. For example: <ul style="list-style-type: none"> <li>– For the loan account opening application, the label of this field appears as <b>Loan Amount</b>.</li> <li>– For the saving, certificate of deposit and checking account opening application, the label of this field appears as <b>Initial Funding Amount</b>.</li> </ul> </li> <li>• <b>Total Time Spent</b>: Displays the total time spent on the application from the first to last stage.</li> </ul>
<Applicant Details Tile>	<p>In this tile, user can view the applicant details. Separate tiles appears for all the applicants that are involved in the application. Below field appears with the respective applicant details:</p> <ul style="list-style-type: none"> <li>• <b>Role of the Applicant</b></li> <li>• <b>Applicant Image</b></li> <li>• <b>Applicant Name</b></li> <li>• <b>Title</b></li> <li>• <b>Customer 360</b> : Click this link to view the 360 degrees view of the customer information. The Customer 360 screen appears with the details. Based on the customer type, refer to the <b>Retail 360 User Guide</b> and <b>Corporate 360 User Guide</b> from the party section.</li> <li>• <b>Date of Birth</b></li> <li>• <b>Mobile Number</b></li> <li>• <b>Email ID</b></li> <li>• <b>CIF Number</b></li> </ul>
View Clarification Details	<p>In this section, the user can view the clarification history. Below fields appear with the details:</p> <ul style="list-style-type: none"> <li>• <b>ID</b></li> <li>• <b>Subject</b></li> <li>• <b>Raised By</b></li> <li>• <b>Date</b></li> <li>• <b>Status</b></li> <li>• <b>Status updated on</b></li> <li>• <b>Actions</b>: User can <b>View</b> or <b>Download</b> the attached documents.</li> </ul> <p>On the click of the respective record the user can view the clarification content.</p>



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

Field	Description
<b>Advices</b>	<p>In this section, the user view the advices generated in the process of account opening.</p> <p>Below fields appear with the details:</p> <ul style="list-style-type: none"> <li>• <b>Advice Name</b></li> <li>• <b>Event:</b> Displays the stage name on which the advice is generated.</li> <li>• <b>Recipients</b></li> <li>• <b>Mode of Delivery</b></li> <li>• <b>Delivery Details</b></li> <li>• <b>Status Details</b></li> <li>• <b>Actions:</b> User can <b>View</b> or <b>Download</b> the advice.</li> </ul>
<b>Related Task</b>	<p>In this section, user can view the stages involved in process of application.</p> <p>The below fields are appear with details:</p> <ul style="list-style-type: none"> <li>• <b>Product Processor:</b> Displays the product which integrated with Oracle Banking Party.</li> <li>• <b>Process Name</b></li> <li>• <b>Process Reference Number</b></li> <li>• <b>Stage</b></li> <li>• <b>Status</b></li> </ul>

6. Click  to close window.

## 1.2 Application Search

This topic describes systematic instructions to view Application Search dashboard.

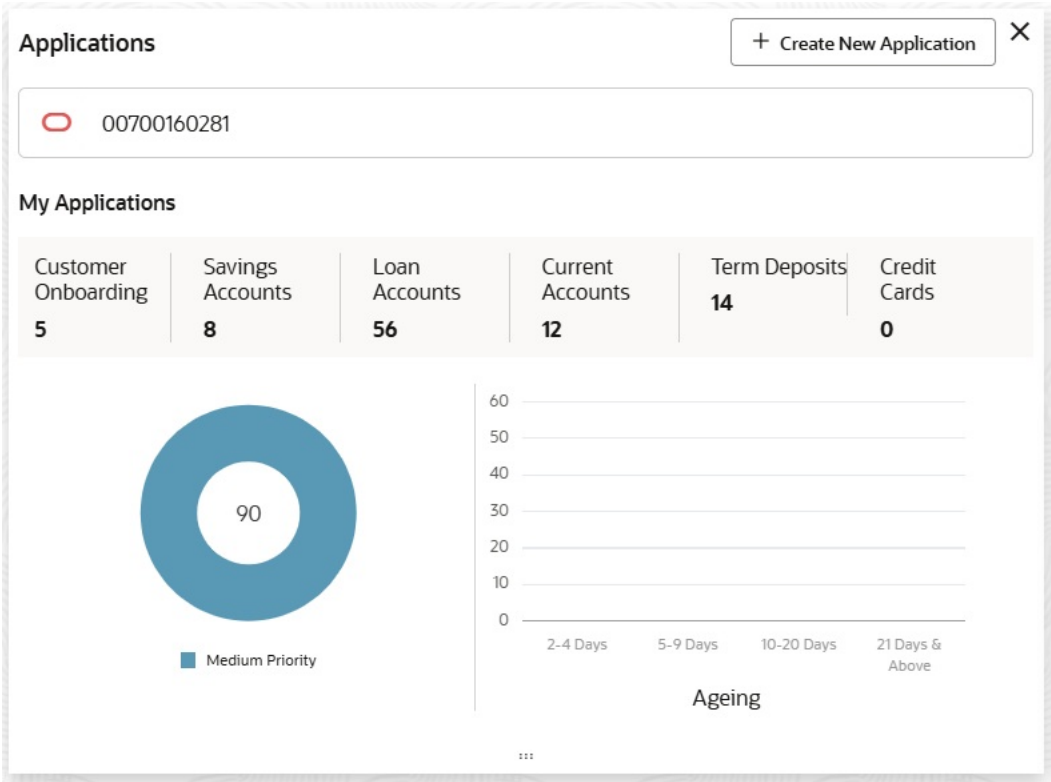
The **Application Search** dashboard allows the user to enquire an application through the various search criteria based on the following:

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

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

The **Application Search** widget displays in the **Dashboard** screen.

Figure 1-5 Application Search



- 2. Click **Search** icon.  
It allows to view the application list and allows further drill-down to view the application details.  
For more information about the **All Applications Drill-Down** screen. Refer to the [My Applications](#) topic.

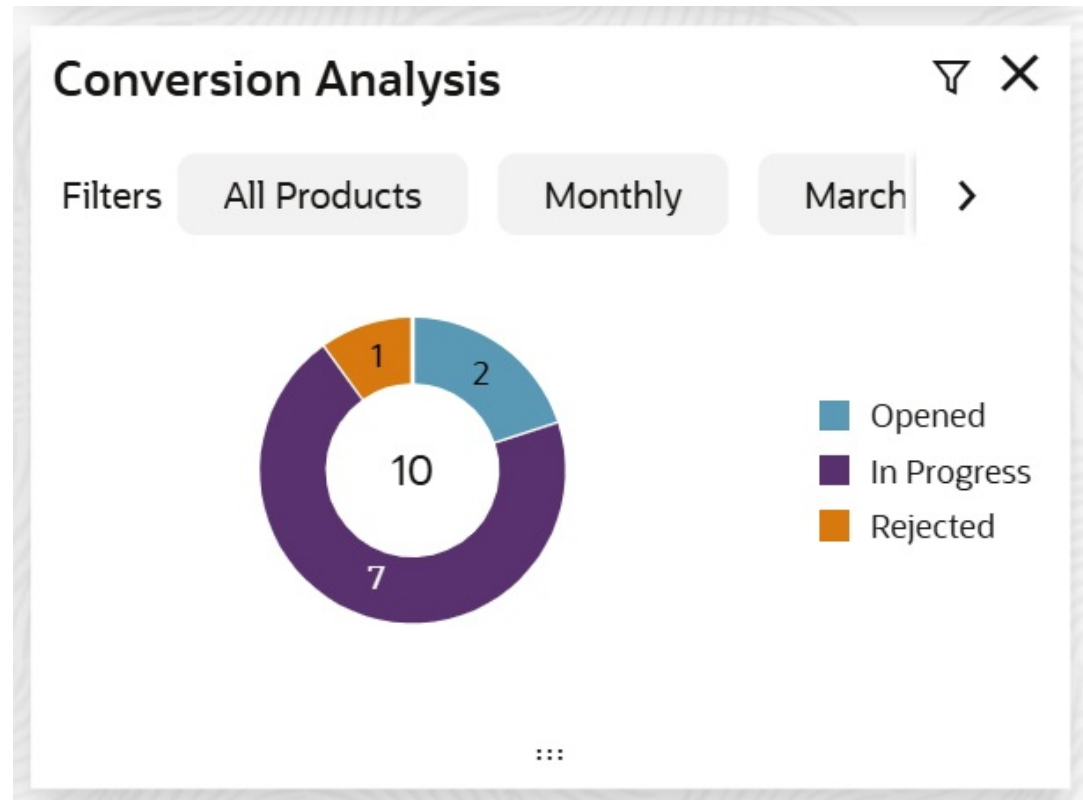
### 1.3 Conversion Analysis


This topic provides the systematic instructions to view Conversion Analysis widget.

The **Conversion Analysis** widget allows the logged-in bank user to view the details of the conversion for the various products originated by them.

- 1. On **Home** screen, click **Dashboard**.  
The **Conversion Analysis** widget displays in **Dashboard** screen.

Figure 1-6 Conversion Analysis



2. Click  to filter the data.

The available options are:

- **Products**
- **Sub-Products**
- **Period**
- **Select Month**
- **Display For**

By default, the system displays the month-wise conversion details of all the products originated for the current month. This widget provides splits across **Opened**, **In-Progress**, and **Rejected** for the products originated.

3. Hover over a section of the pie chart to view a specific status.

The pop-up displays the details below:

- **Status**
- **Total Count**

4. Click on hyper-linked number to redirect to the **All Applications** screen.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-7 All Application - Conversion Analysis**

All Applications					
<input type="text"/> Search with Application Number / CIF Number / Customer Name / Mobile Number / Email ID / Unique ID / National ID					
Application Number	Application Date	Product Type	Business Product Name	Customer Name	CIF Number
006APP000159402	March 30, 2018 at 11:53:24 AM	Current Accounts	Premier Checking Account	Mr. Brett G Dalton JR	006016104
006APP000159552	March 30, 2018 at 9:32:13 AM	Savings Accounts	Max Savings Account	Mr. Brett G Dalton JR	006016104
006APP000159964	March 30, 2018 at 3:50:33 AM	Home Loans	US Classic Home Loan	Mr. David Dravid Boon	006016088
006APP000159979	March 30, 2018 at 8:24:26 AM	Home Loans	US Classic Home Loan	Mr. David Dravid Boon	006016088
					<input type="button" value="Cancel"/>

For more information, refer to the fields description table below.

**Table 1-4 All Applications – Field Description**

Field	Description
<b>Application Number</b>	Displays the application reference number.
<b>Application Date</b>	Displays the application date.
<b>Product Type</b>	Displays the type of product.
<b>Business Product Name</b>	Displays the name of the business product.
<b>Customer Name</b>	Displays the customer name.
<b>CIF Number</b>	Displays the Customer Information File number.
<b>Status</b>	Displays the status of each application.
<b>Mobile</b>	Displays the mobile number.

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

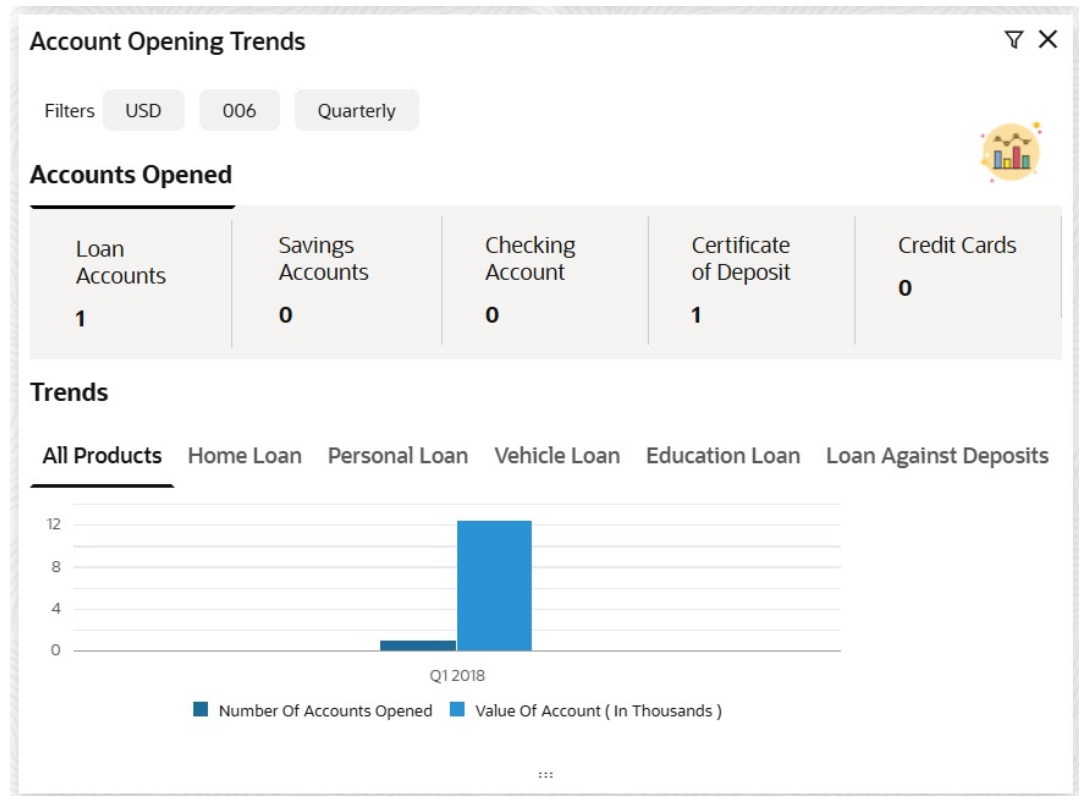
## 1.4 Account Opening Trends

This topic describes systematic instructions to view Account opening trend widget.

The Account Opening Trend widget allows logged-in bank users view the trend of accounts that the bank opened for each Product Type, such as Credit Cards, Loan Accounts, Savings Accounts, Checking Accounts, or Certificate of Deposits Accounts for the specified period.

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


The **Account Opening Trend** widget displays in the **Dashboard** screen.

**Figure 1-8 Account Opening Trend**

This widget displays the value of accounts (in thousands) compared to the number of accounts opened for all business product in Oracle Banking Origination.

2. Hover over the bar chart to view the below details in the pop-up.


- **Series**
- **Group**
- **Value**

3. Click  to filter the data.

The available options are:

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

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

4. Click  to change the chart type.

## 1.5 Stage Wise Details

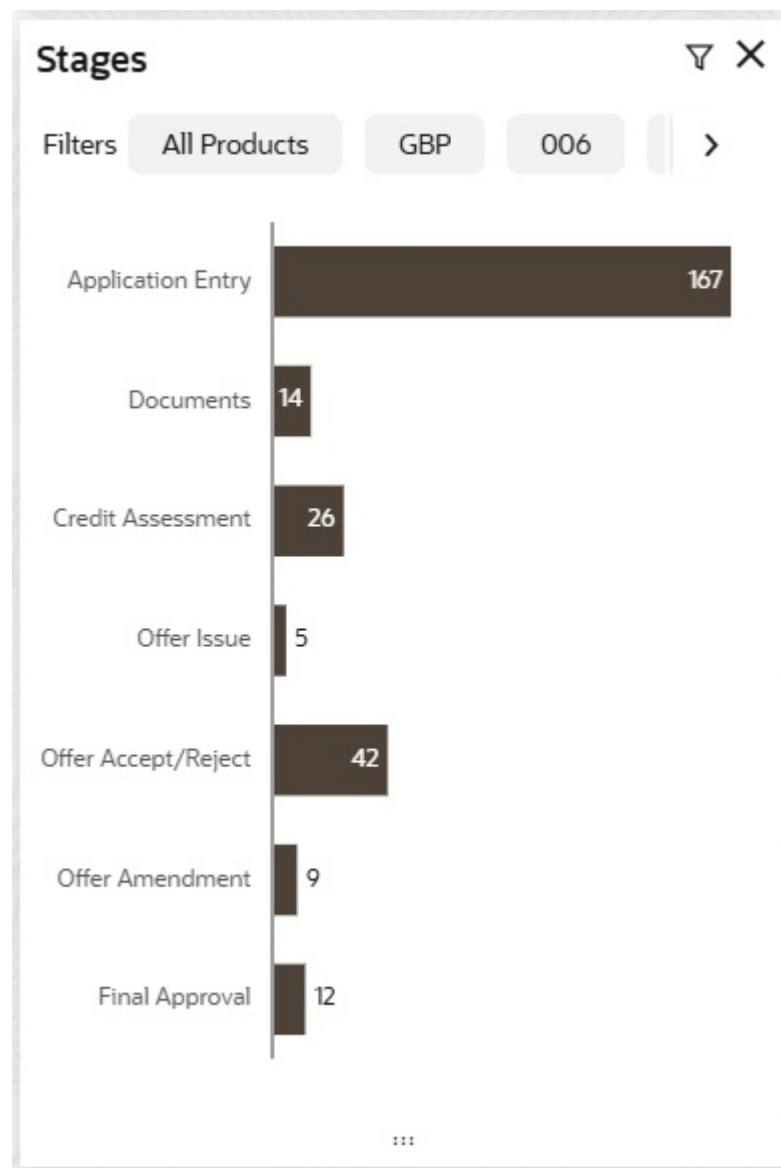
This topic describes the systematic instructions to display Stage Wise Details widget.

The **Stage Wise Details** widget allows the logged-in user to view the stage-wise details of the business process for their branch.

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

The **Stage Wise Details** widget displays on **Dashboard** screen.

**Figure 1-9 Stage Wise Details**



Each horizontal bar represents the **Stage Group**.

2. Click a horizontal bar to represent a specific stage group

A pop-over displays an additional horizontal bar graph that shows the application count for each stage in that stage group.


For more information, refer to the stage description table below.

**Table 1-5 Application stage group and its stages**

Stage Group	Stages
<b>Application Entry</b>	<ul style="list-style-type: none"> <li>Application Initiation</li> <li>Application Entry</li> <li>Application Enrichment</li> <li>Overdraft Limit Details</li> <li>Initial Funding</li> <li>Debit Assessment</li> <li>Manual Debit Assessment</li> </ul>
<b>Documents</b>	Application Documents
<b>Credit Assessment</b>	<ul style="list-style-type: none"> <li>Underwriting</li> <li>Assessment</li> <li>Manual Credit Assessment</li> <li>Manual Credit Decision</li> <li>Account Parameter</li> <li>Account Parameter Setup</li> <li>Supervisor Approval</li> </ul>
<b>Offer Issue</b>	Offer Issue
<b>Offer Accept/Reject</b>	<ul style="list-style-type: none"> <li>Customer Offer Accept/Reject</li> <li>Offer Accept/Reject</li> </ul>
<b>Offer Amendment</b>	Post Offer Amendment
<b>Final Approval</b>	<ul style="list-style-type: none"> <li>Account Approval</li> <li>Handoff Retry</li> <li>Open Account</li> </ul>
<b>Account Funding</b>	Account Funding

3. Hover over a horizontal bar for a specific stage to displays the following details.

- **Phase Name**
- **Total Applications**

4. Click  to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Products**
- **Sub-Products**
- **Period**
- **Select Month**

By default, the system displays the stage-wise details of the loans of the logged-in user for the current month. On selecting a product, the widget refreshes and fetches the values for the selected product type.

## 1.6 Loan Offer Status

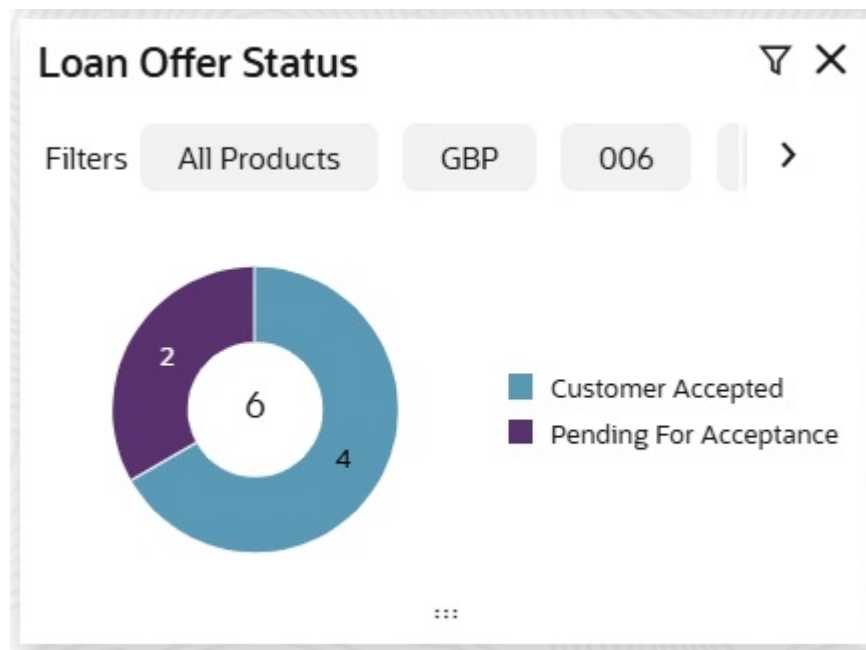
This topic describes systematic instructions to view Loan Offer Status widget.

The **Loan Offer Status** widget allows the logged-in 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.

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

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

**Figure 1-10** Loan Offer



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

- **Bank Reject**
  - **Customer Accepted**
  - **Pending for Acceptance**
  - **Customer Rejected**
2. Hover over a section of the pie chart to view a specific status.

The pop-up displays the details below:

- **Status**
- **Total Applications**
- **Total Value**

3. Click  icon to filter the data.

The available options are:



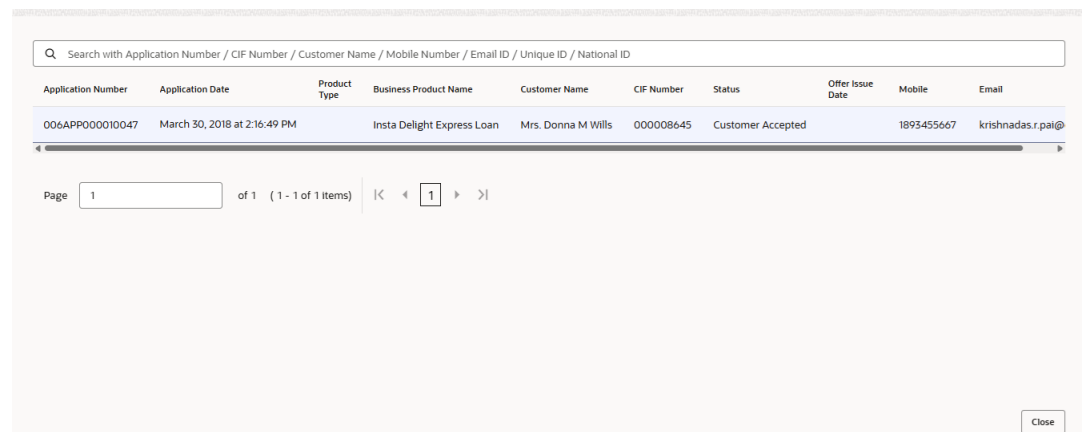
- **Currency**
- **Branch**
- **Sub-Products**
- **Period**
- **Select Month**

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

4. Click on hyper-linked number to redirect to the **All Applications** screen.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-11 All Applications - Loan Offer Status**



The screenshot shows a web application interface for 'All Applications'. At the top is a search bar with the placeholder text 'Search with Application Number / CIF Number / Customer Name / Mobile Number / Email ID / Unique ID / National ID'. Below the search bar is a table with the following columns: Application Number, Application Date, Product Type, Business Product Name, Customer Name, CIF Number, Status, Offer Issue Date, Mobile, and Email. A single row of data is displayed: Application Number 006APPO00010047, Application Date March 30, 2018 at 2:16:49 PM, Product Type Insta Delight Express Loan, Business Product Name Mrs. Donna M Wills, Customer Name 000008645, Status Customer Accepted, Offer Issue Date 1893455667, Mobile krishnadas.r.pai@, and Email. Below the table is a pagination control showing 'Page 1 of 1 (1 - 1 of 1 Items)' with navigation arrows. A 'Close' button is located in the bottom right corner.

Application Number	Application Date	Product Type	Business Product Name	Customer Name	CIF Number	Status	Offer Issue Date	Mobile	Email
006APPO00010047	March 30, 2018 at 2:16:49 PM	Insta Delight Express Loan	Mrs. Donna M Wills	000008645	Customer Accepted	1893455667	krishnadas.r.pai@		

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

**Table 1-6 All Applications – Field Description**

Field	Description
<b>Application Number</b>	Displays the application reference number.
<b>Application Date</b>	Displays the application date.
<b>Product Type</b>	Displays the type of product.
<b>Business Product Name</b>	Displays the name of the business product.
<b>Customer Name</b>	Displays the customer name.
<b>CIF</b>	Displays the CIF number.
<b>Status</b>	Displays the status of the application.
<b>Offer Issue Date</b>	Displays the offer issue date.
<b>Mobile</b>	Displays the mobile number.
<b>Email</b>	Displays the Email ID.

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

## 1.7 Loan Exposure to Collateral

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

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

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

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


**Figure 1-12** Loan Exposure to Collateral



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

2. Hover on the bar chart to display the below details on hover pop-up.

- **Series**
- **Group**
- **Value**

3. Click  to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Sub-Products**
- **Period**
- **Select Month**

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

## 1.8 Applications Nearing Expiration

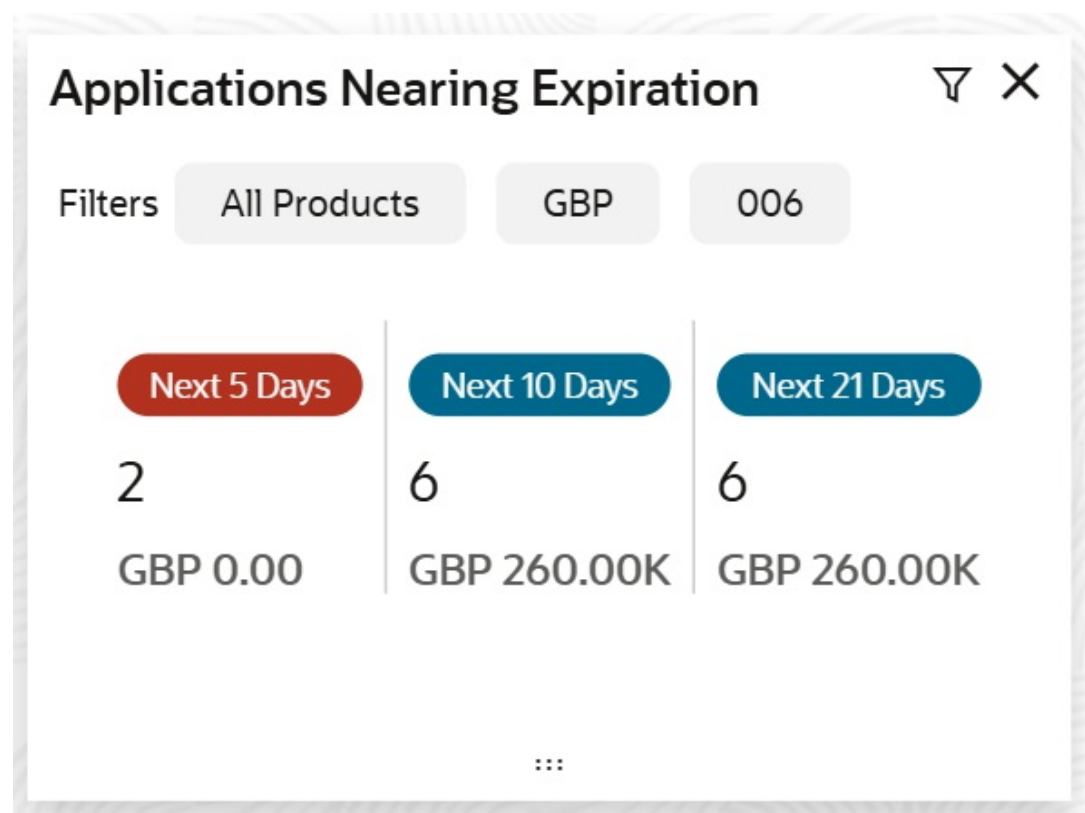
This topic describes systematic instructions to view Applications Nearing Expiration widget.


The **Applications Nearing Expiration** widget allows the logged-in bank user to view the details of applications which are nearing to expiry date.

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

The **Applications Nearing Expiration** widget displays in the **Dashboard** screen.

**Figure 1-13 Applications Nearing Expiration**



2. Click  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.

- Click on hyper-linked number, to redirect to the **All Applications** screen.  
The **All Applications** screen displays the list of various applications.

**Figure 1-14 All Applications**

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

**Table 1-7 All Applications – Field Description**

Field	Description
<b>Application Number</b>	Displays the application reference number.
<b>Application Date</b>	Displays the application date.
<b>Product Type</b>	Displays the type of product.
<b>Business Product Name</b>	Displays the name of the business product.
<b>Customer Name</b>	Displays the customer name.
<b>CIF Number</b>	Displays the CIF number.
<b>Status</b>	Displays the status of the application.
<b>Application Expiry Date</b>	Displays the application expiry date.
<b>Days To Expire</b>	Displays the number of days to expire the application.
<b>Mobile</b>	Displays the mobile number.
<b>Email</b>	Displays the e-mail ID.

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

## 1.9 Loan Offers Nearing Expiration

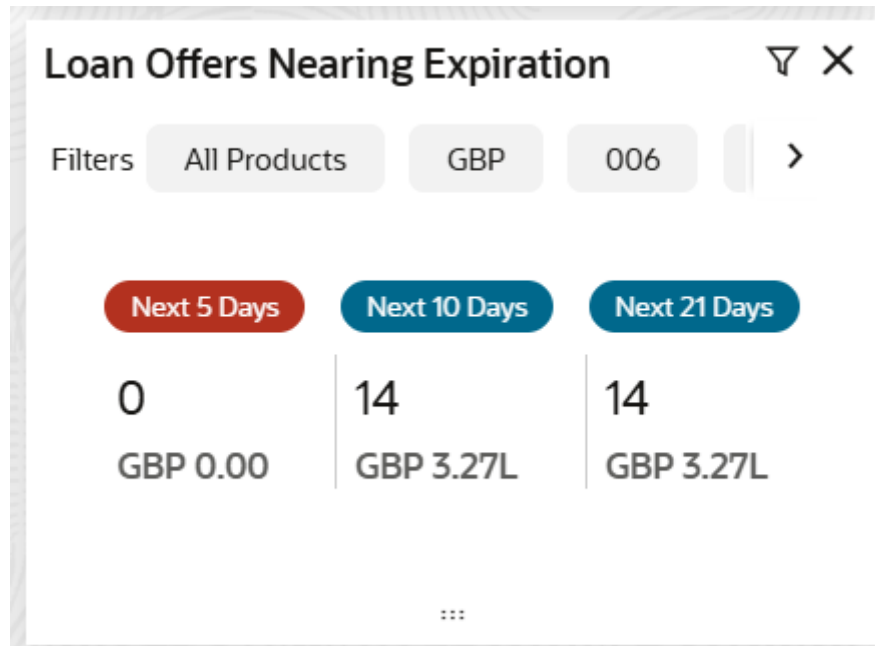
This topic describes systematic instructions to view Loan Offers Nearing Expiration widget.

The **Loan Offers Nearing Expiration** widget allows the logged-in bank user, such as Relationship Manager, Loan Officer, or Loan Head, to view the details of loan offers which are nearing to expiry date.


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

The **Loan Offers Nearing Expiration** widget displays in **Dashboard** screen.

Figure 1-15 Loan Offers Nearing Expiration



The value of widget displays based on filter parameter selected.

- Click  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.

- Click on the count of applications in bucket list.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-16 Loan Offers Near Expiry Drill-Down**

Search with Application Number / CIF Number / Customer Name / Mobile Number / Email ID / Unique ID / National ID									
Application Number	Application Date	Product Type	Business Product Name	Customer Name	CIF Number	Status	Offer Issue Date	Mobile	Email
006APP000010047	March 30, 2018 at 2:16:49 PM		Insta Delight Express Loan	Mrs. Donna M Wills	000008645	Customer Accepted		1893455667	krishnadas.r.pai@

Page 1 of 1 (1 - 1 of 1 Items) |< 1 >|

Close

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

**Table 1-8 All Applications – Field Description**

Field	Description
<b>Application Number</b>	Displays the application reference number.
<b>Application Date</b>	Displays the application date.
<b>Product Type</b>	Displays the type of product.
<b>Business Product Name</b>	Displays the name of business product.
<b>Customer Name</b>	Displays the customer name.
<b>CIF Number</b>	Displays the CIF number.
<b>Status</b>	Displays the status of the application.
<b>Offer Issue Date</b>	Displays the offer issue date.
<b>Application Expiry Date</b>	Displays the application expiry date.
<b>Days To Expire</b>	Displays the number of days to expire the application.
<b>Mobile</b>	Displays the mobile number.
<b>Email</b>	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**

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

# 1.10 SLA Status Summary

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

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.

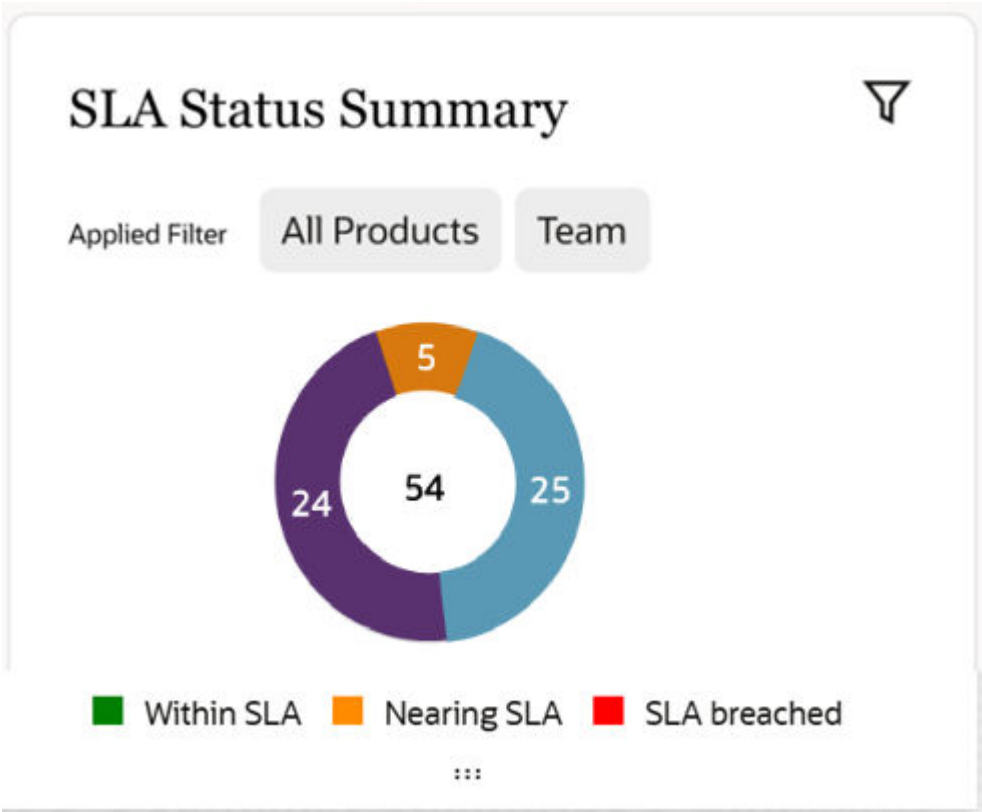
Click the right arrow on the widget to view the SLA widget in graphical chart (pie chart) as well as in tabular form.


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

- 1. On **Home** screen, click **Dashboard**.  
The **SLA Status Summary - Graphical View** widget displays in the **Dashboard** screen.

Figure 1-17 SLA Status Summary - Graphical View



- 2. Click  to view the SLA status summary in Tabular view.  
The **SLA Status Summary - Tabular view** widget displays in the **Dashboard** screen.

**Figure 1-18 SLA Status Summary - Tabular View**


SLA Status Summary

Status	Process Reference Number	Branch	Process Name	Stage Name	Customer Id	Currency	amount
No data to display.							
Page 1 (0 of 0 items)  < < 1 > >							

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

**Table 1-9 SLA Status Summary – Field Description**


Field	Description
Status	Displays the SLA Status.
Process Reference Number	Displays the Process Reference Number.
Branch	Displays the Branch.
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  to filter the data.  
The **Filter by** screen displays.

**Figure 1-19 Filter By**


**Filter By**

Customer Id



Branch


Select




Required

Process Name

All




From Date




To Date

March 30, 2018



SLA Status



Fetch

Close

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

**Table 1-10 Filter By – Field Description**

Field	Description
Customer ID	Click <b>Search</b> icon and select the Customer ID from the list
Branch	Select the required Branch Code & Name from the drop-down list.



Table 1-10 (Cont.) Filter By – Field Description

Field	Description
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. <b>Note</b> : By default branch date will be shown.
SLA Status	Select the <b>SLA Status</b> from the drop-down list. The available options are: <ul style="list-style-type: none"><li>• <b>Within SLA</b></li><li>• <b>Near Breach</b></li><li>• <b>Breached</b></li></ul>

# 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
<b>Account Opening Trends</b>	RPM_FA_PROCESS_DRIVER_Dashboard_ACCOUNT_OPENING_TR END
<b>Application Search</b>	RPM_FA_WD_MY_SEARCH
<b>Conversion Analysis</b>	RPM_FA_PROCESS_DRIVER_Dashboard_CONVERSION_ANALYSIS
<b>Loan Exposure to Collateral</b>	RPM_FA_PROCESS_DRIVER_Dashboard_COLLATERAL
<b>Loan Offers Near Expiry</b>	RPM_FA_WD_MY_LOAN_EXPIRY
<b>Loan Offer Status</b>	RPM_FA_PROCESS_DRIVER_Dashboard_LOAN_OFFER_STATUS
<b>Loan Pipeline</b>	RPM_FA_PROCESS_DRIVER_Dashboard_PARKEDLOAN
<b>My Applications</b>	RPM_FA_DASHBOARD_MY_APPLICATIONS
<b>My Applications</b>	RPM_FA_PROCESS_DRIVER_Dashboard_MY_APPLICATION
<b>Product Application Near Expiry</b>	RPM_FA_WD_MY_PRODUCT_EXPIRY

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