

Oracle® Banking Virtual Account Management Alerts User Guide



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Preface

Purpose

This guide provides the information on the Alerts set up in Virtual Account Management System.

Audience

This guide is intended for WebLogic admin or ops-web team who are responsible for installing the OFSS banking products.

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

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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

The related documents are as follows:

- *Oracle Banking Security Management System User Guide*
- *Oracle Banking Common Core User Guide*
- *Oracle Banking Getting Started User Guide*

Conventions

The following text conventions are used in this document:

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

Screenshot Disclaimer

Personal information used in the interface or documents are dummy and does not exist in the real world. It is only for reference purposes.

1

Introduction

In Oracle Banking Virtual Account Management, alerts can be sent to the to corporate or bank users for the below business events:

Accounts:

- Account Creation
- Account Modification
- Account Closure

Transactions:

- Credit Transaction
- Debit Transaction

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Alerts Maintenance

This topic describes the information to setup the reference data for Alerts such as contact details, definition, template details, template ID and decisioning in Virtual Account Management system.

2.1 Alert Definition

This topic describes the information to maintain the alert definitions in Virtual Account Management system.

The Alert Definition feature allows users to set up and manage different types of alerts. Users can create categories for alerts based on various events. These alerts can then be utilized in the Alert Decisioning screen to establish specific alerts.

This topic contains the following subtopics:

2.1.1 Create Alert Definition

This topic describes the systematic instruction to configure and manage various types of alerts.

Newly established alert types become active once approved and cannot be changed afterward.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Definition**. Under **Alert Definition**, click **Create Alert Definition**

The **Create Alert Definition** screen displays.

Figure 2-1 Create Alert Definition

Create Alert Definition Errors and Overrides ⌵ ⌵ ⌵

 Alert Code Required	 Alert Description Required	Select Alert Category Required
Select Event Required	 Effective Date Required	 Expiry Date Required

Cancel Save

2. Specify the fields on **Create Alert Definition** screen.

Note

The fields marked as **Required** are mandatory.

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

Table 2-1 Create Alert Definition - Field Description

Field	Description
Alert Code	Specify the unique alert code to be maintained in the system.
Alert Description	Specify the description of the alert.
Alert Category	Select the category of the alert. The available options are: • Accounts • Transactions
Event	Select an event to create an alert. The events shown will depend on the chosen category If you select the Accounts category, the dropdown list will display the following events:: • Account Creation • Account Modification • Account Closure If the Category is selected as Transactions , the following events are displayed in the dropdown list: • Credit transaction • Debit transaction
Effective Date	Select the Calendar icon and choose the date when the alert will start in the system.
Expiry Date	Click the Calendar icon and select the Expiry date up to which the alert can be used in the system.

3. Click **Save** to save the record and send it for authorization.

2.1.2 View Alert Definition

This topic describes the systematic instruction to view, modify, or authorize alert definitions.

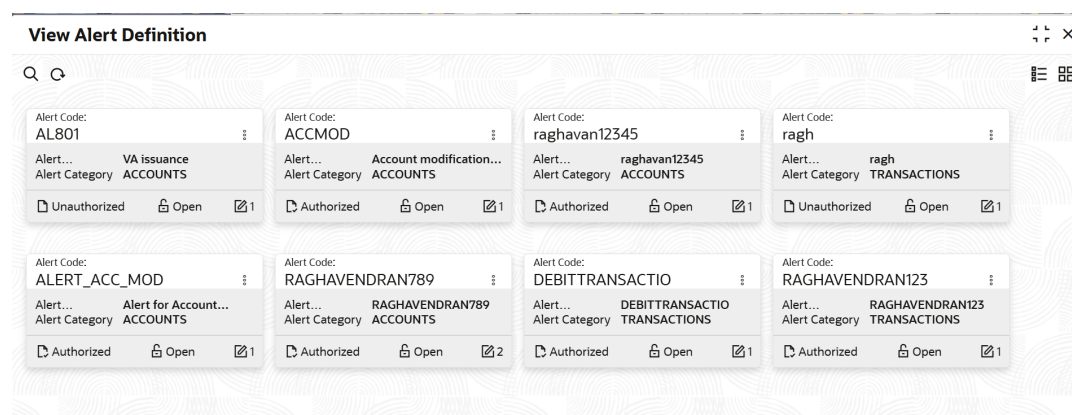
A tile is present for each record that has been created. The bottom portion of each record-tile displays the following:

- The status, whether Authorized, Unauthorized, or Rejected.
- Open or Closed.
- The number of times the record has been submitted by the Maker added.

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

1. On **Home** screen, click **Cash Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Definition**. Under **Alert Definition**, click **View Alert Definition**.

The **View Alert Definition** screen displays.

Figure 2-2 View Alert Definition

2. Filter the records in the **View** screen:
 - a. Select the Search icon to access the filters. Users can sort the records by Alert Code, Alert Description, Authorization Status, and Record Status.
 - b. Select the required filter criteria and click **Search** to filter the records.
 - c. Click **Reset** to reset the filter criteria.
3. Click **Refresh** icon to refresh the records.
4. Click **Options** icon and then select any of the following options:
 - a. **Unlock** – To modify the record details. Refer to the **Create** screen for the field level details.
 - Click **Audit** to view the maker details, checker details of the record.
 - Click **Show History** hyperlink to view the historical data of the record.
 - b. **Authorize** – To authorize or reject the record. Authorizing/Rejecting requires necessary access rights.
 - Optional: Click **View** to view the record details.
 - If there are more than one modifications, Click **Compare** to view the comparison through the field values of old record and the current record.
 - Select the record and click **Approve** to approve the record.
 - Select the record and click **Reject** to reject the record. Specify the relevant comments in the pop-up window that appears, and click **Confirm**.
 - c. **Delete/Close** – To remove the record.
 - Optional: In the confirmation pop-up window, click **View** to view the record details.
 - Click **Proceed** to delete the record.
 - d. **Copy** – To copy the record parameters for creating a new record.
 - e. **View** – To view the record details.
 - f. **Reopen** – To reopen the closed record.

2.2 Alert Template ID

This topic describes the information to create a Template ID for specific events for each corporate in Virtual Account Management system.

This topic contains the following subtopics:

2.2.1 Create Alert Template ID

This topic describes the systematic instruction to create template ID for specific events.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Template ID**. Under **Alert Template ID**, click **Create Alert Template ID**.

The **Create Alert Template ID** screen displays.

Figure 2-3 Create Alert Template ID

2. Specify the fields on **Create Alert Template ID** screen.

Note

The fields marked as **Required** are mandatory.

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

Table 2-2 Create Alert Template ID - Field Description

Field	Description
Alert Template ID	Specify a unique ID for the template.
Alert Template Description	Specify the description of the template.
Alert Category	Select the category of the alert. The available options are: • Accounts • Transactions

Table 2-2 (Cont.) Create Alert Template ID - Field Description

Field	Description
Event	Select the event to set the alerts. The list of events are displayed based on the selected category. If the Category is selected as Accounts, the following events are displayed in the dropdown list: • Account Creation • Account Modification • Account Closure If the Category is selected as Transactions, the following events are displayed in the dropdown list: • Credit Transaction • Debit Transaction

3. Click **Save** to save the record and send it for authorization.

2.2.2 View Alert Template ID

This topic describes the systematic instruction to view, modify, or authorize alert template ID.

A tile is present for each record that has been created. The bottom portion of each record-tile displays the following:

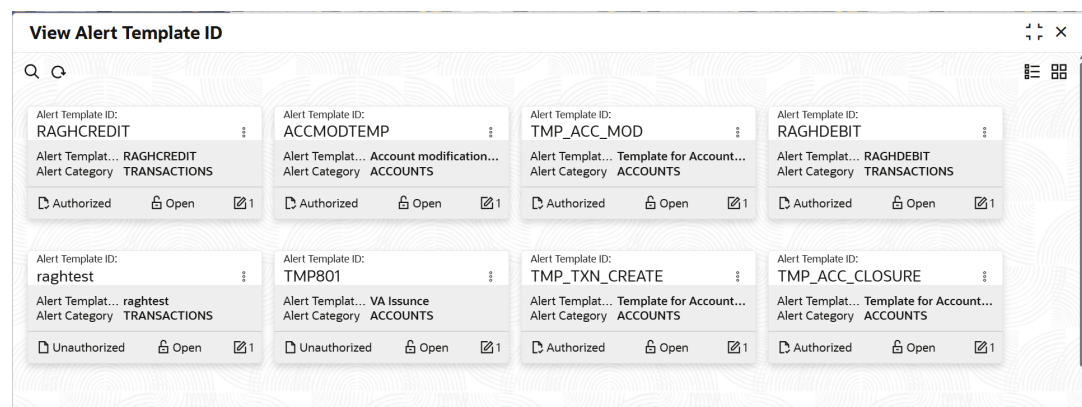
- The status, whether Authorized, Unauthorized, or Rejected.
- Open or Closed.
- The number of times the record has been submitted by the Maker added.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Template ID**. Under **Alert Template ID**, click **View Alert Template ID**

The **View Alert Template ID** screen displays.

Figure 2-4 View Alert Template ID



2. Filter the records in the **View** screen:
 - a. Click **Search** icon to view the filters. The user can filter the records by Corporate, Authorization Status, Record Status and Category.

- b. Select the required filter criteria and click **Search** to filter the records.
 - c. Click **Reset** to reset the filter criteria.
 3. Click **Refresh** icon to refresh the records.
 4. Click **Options** icon and then select any of the following options:
 - a. **Unlock** – To modify the record details. Refer to the **Create** screen for the field level details.
 - Click **Audit** to view the maker details, checker details of the record.
 - Click **Show History** hyperlink to view the historical data of the record.
 - b. **Authorize** – To authorize or reject the record. Authorizing/Rejecting requires necessary access rights.
 - Optional: Click **View** to view the record details.
 - If there are more than one modifications, Click **Compare** to view the comparison through the field values of old record and the current record.
 - Select the record and click **Approve** to approve the record.
 - Select the record and click **Reject** to reject the record. Specify the relevant comments in the pop-up window that appears, and click **Confirm**.
 - c. **Delete/Close** – To remove the record.
 - Optional: In the confirmation pop-up window, click **View** to view the record details.
 - Click **Proceed** to delete the record.
 - d. **Copy** – To copy the record parameters for creating a new record.
 - e. **View** – To view the record details.
 - f. **Reopen** – To reopen the closed record.

2.3 Alert Template Details

This topic describes the information to maintain the email ID and SMS content for each combination of **Template ID** and **Language**, for each corporate in Virtual Account Management system.

This topic contains the following subtopics:

2.3.1 Create Alert Template Details

This topic describes the systematic instruction to create alert template details to a specific corporate.

Users can customize the text for email and SMS for each combination of Template ID and Language.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Template Details**. Under **Alert Template Details**, click **Create Alert Template Details**

The **Create Alert Template Details** screen displays.

Figure 2-5 Create Alert Template Details

- Specify the fields on **Create Alert Template Details** screen.

Note

The fields marked as **Required** are mandatory.

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

Table 2-3 Create Alert Template Details - Field Description

Field	Description
Template ID	Click the search icon and select the specific template ID for which the text needs to be configured.
Template Description	Displays the description of the selected alert template ID.
Locale	Click the search icon and select the specific language.
Mode	Select the mode through which the alert should be sent. The available options are: Email SMS
Subject	Specify the subject of the email to be sent.
Body	Specify the body of the alert message needs to be sent.
Supported Placeholders	Displays the supported placeholders.

- Click **Save** to save the record and send it for authorization.

2.3.2 View Alert Template Details

This topic describes the systematic instruction to view, modify, or authorize the alert template details.

A tile is present for each record that has been created. The bottom portion of each record-tile displays the following:

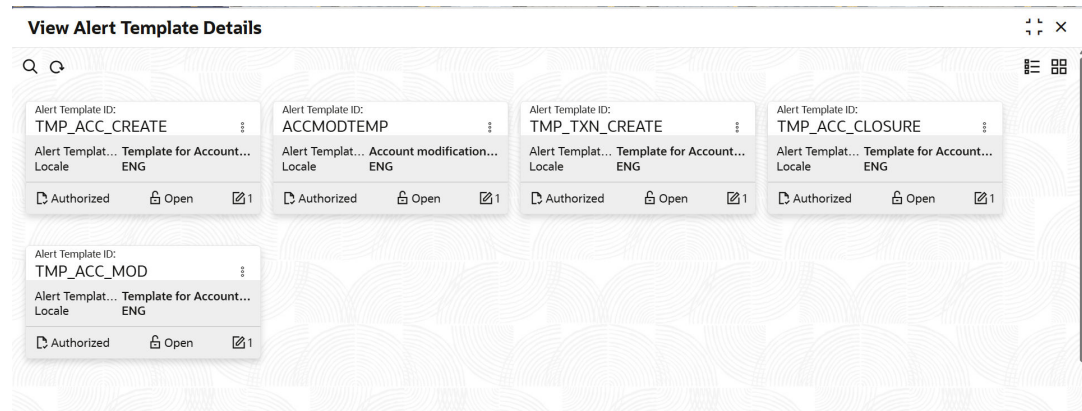
- The status, whether Authorized, Unauthorized, or Rejected.
- Open or Closed.
- The number of times the record has been submitted by the Maker added.

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

1. On **Home** screen, click **Cash Management**. Under **Cash Management**, click **Alerts**. Under **Alerts**, click **Alert Template Details**. Under **Alert Template Details**, click **View Alert Template Details**

The **View Alert Template Details** screen displays.

Figure 2-6 View Alert Template Details



2. Filter the records in the **View** screen:
 - a. Click **Search** icon to view the filters. The user can filter the records by Corporate, Authorization Status, Record Status and Category.
 - b. Select the required filter criteria and click **Search** to filter the records.
 - c. Click **Reset** to reset the filter criteria.
3. Click **Refresh** icon to refresh the records.
4. Click **Options** icon and then select any of the following options:
 - a. **Unlock** – To modify the record details. Refer to the **Create** screen for the field level details.
 - Click **Audit** to view the maker details, checker details of the record.
 - Click **Show History** hyperlink to view the historical data of the record.
 - b. **Authorize** – To authorize or reject the record. Authorizing/Rejecting requires necessary access rights.
 - Optional: Click **View** to view the record details.
 - If there are more than one modifications, Click **Compare** to view the comparison through the field values of old record and the current record.
 - Select the record and click **Approve** to approve the record.
 - Select the record and click **Reject** to reject the record. Specify the relevant comments in the pop-up window that appears, and click **Confirm**.
 - c. **Delete/Close** – To remove the record.
 - Optional: In the confirmation pop-up window, click **View** to view the record details.
 - Click **Proceed** to delete the record.
 - d. **Copy** – To copy the record parameters for creating a new record.

- e. **View** – To view the record details.
- f. **Reopen** – To reopen the closed record.

2.4 Alert Decisioning

This topic describes the information to manage how and when alerts are sent to recipients in Virtual Account Management system.

The delivery mode and frequency for sending the alerts can also be defined.

This topic contains the following subtopics:

2.4.1 Create Alert Decisioning

This topic describes the systematic instruction to set the delivery mode and frequency of sending alerts to a recipient.

Newly established decision records become active once they are approved. The phone number and email address are retrieved from the records in the Alert Contact Details screen. You can also add more contact information on this screen.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Decisioning**. Under **Alert Decisioning**, click **Create Alert Decisioning**.

The **Create Alert Decisioning** screen displays.

Figure 2-7 Create Alert Decisioning

2. Specify the fields on **Create Alert Decisioning** screen.

Note

The fields marked as **Required** are mandatory.

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

Table 2-4 Create Alert Decisioning - Field Description

Field	Description
Alert Category	Select the category to configure the alerts. The available options are: • Accounts • Transactions
Event	Select the event to set the alert. The list of events are displayed based on the selected category. If the Category is selected as Accounts , the following events are displayed in the dropdown list: • Account Creation • Account Modification • Account Closure If the Category is selected as Transactions , the following events are displayed in the dropdown list: • Credit Transaction • Debit Transaction
Alert Code	Click the search icon to set the alert code. The available options are: • Alert Code • Alert Description
Description	Displays the description of the selected alert code.
Recipient	Select the recipient to whom the alert should be sent. The following events are displayed in the dropdown list: • Bank User • Customer
Frequency	Select if the alert should be sent immediately when the event happens or if it should be scheduled to be sent before the event takes place.
Delivery Mode	Select the mode through which the alert should be sent, The available options are: • Email • SMS
Template ID	Click the search icon and Select the template ID which will be used to send an email alert.

3. Perform the following any one of the action :
 - a. Click **Add/Edit** to add alert decision details in the grid or modify a selected records from the grid.
 - b. Click **Reset** to modify records in the grid.
4. Perform the following steps to take action on the records in the grid.
 - a. Select the record in the grid and click **Options** icon under the **Action** column.
 - b. Click **Edit** to modify records in the grid.
 - c. Click **Delete** to remove the record.
5. Click **Save** to save the record and send it for authorization.

2.4.2 View Alert Decisioning

This topic describes the systematic instruction to view, modify, or authorize alert decisioning record details.

A tile is present for each record that has been created. The bottom portion of each record-tile displays the following:

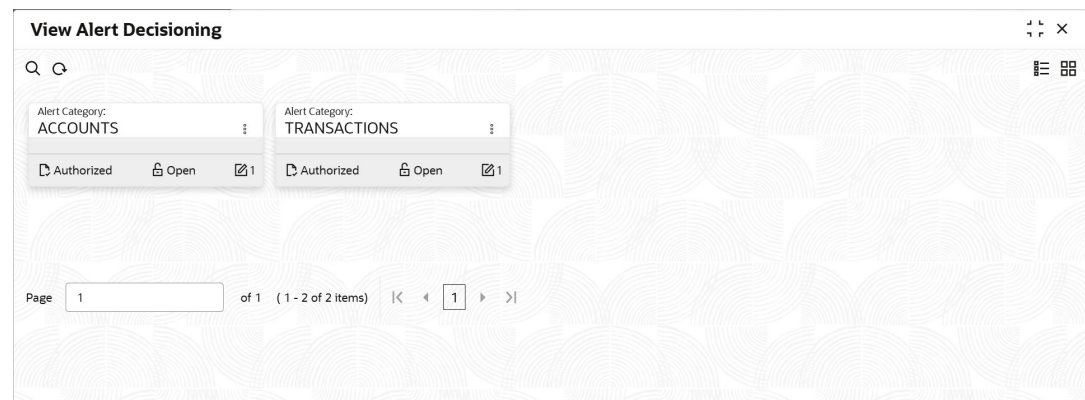
- The status, whether Authorized, Unauthorized, or Rejected.
- Open or Closed.
- The number of times the record has been submitted by the Maker added.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Decisioning**. Under **Alert Decisioning**, click **View Alert Decisioning**

The **View Alert Decisioning** screen displays.

Figure 2-8 View Alert Decisioning



2. Filter the records in the **View** screen:
 - a. Click **Search** icon to view the filters. The user can filter the records by Corporate, Authorization Status, Record Status and Category.
 - b. Select the required filter criteria and click **Search** to filter the records.
 - c. Click **Reset** to reset the filter criteria.
3. Click **Refresh** icon to refresh the records.
4. Click **Options** icon and then select any of the following options:
 - a. **Unlock** – To modify the record details. Refer to the **Create** screen for the field level details.
 - Click **Audit** to view the maker details, checker details of the record.
 - Click **Show History** hyperlink to view the historical data of the record.
 - b. **Authorize** – To authorize or reject the record. Authorizing/Rejecting requires necessary access rights.
 - Optional: Click **View** to view the record details.
 - If there are more than one modifications, Click **Compare** to view the comparison through the field values of old record and the current record.
 - Select the record and click **Approve** to approve the record.
 - Select the record and click **Reject** to reject the record. Specify the relevant comments in the pop-up window that appears, and click **Confirm**.
 - c. **Delete/Close** – To remove the record.
 - Optional: In the confirmation pop-up window, click **View** to view the record details.

- Click **Proceed** to delete the record.
- d. **Copy** – To copy the record parameters for creating a new record.
- e. **View** – To view the record details.
- f. **Reopen** – To reopen the closed record.

2.5 Alert Contact Details

This topic describes the necessary information to keep the phone number and email address of the contact person for sending alerts to each corporate and bank user in the Virtual Account Management system.

This topic contains the following subtopics:

2.5.1 Create Alert Contact Details

This topic describes the systematic instruction to create contact details for sending alerts to a specific corporate.

Various contacts can be assigned to receive specific types of alerts. Newly added contact information becomes active after approval.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Contact Details**. Under **Alert Contact Details**, click **Create Alert Contact Details**

The **Create Alert Contact Details** screen displays.

Figure 2-9 Create Alert Contact Details

2. Specify the fields on **Create Alert Contact Details** screen.

Note

The fields marked as **Required** are mandatory.

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

Table 2-5 Create Alert Contact Details - Field Description

Field	Description
Customer Number	Select the customer number to update their contact number and email address. Note: This field will displays only if Customer Number is selected.
Customer Name	Select customer Name for maintenance of contact number or email ID for customers. Note: This field will displays only if Customer Number is selected.
Virtual Entity ID	Select the Virtual Entity to manage the contact number and email ID at the Entity Level for Alert Codes. The Entity IDs will be shown based on the Customer Selection. Note: This field will displays only if Customer Number is selected.
Virtual Entity Name	Displays the Virtual Entity Name for managing contact numbers or email IDs at the Entity Level for Alert Codes. The Entity Name will appear based on the selected Entity ID. Note: This field will displays only if Customer Number is selected.
Bank User	Select Bank User for maintenance of contact number or email ID for bank users.
Alert Code	Select the alert code for updating the contact details that require configuration. Users can set up several contact details for the same alert code.
Event	Select the Event for alerts.
Email	Select the Email to Configure the email ids to send the email alerts.
Action	Specify the actions needed for Alerts Configuring.

3. Click **Add** icon to add a row for a contact.
 - a. Double-click the **Alert Code** column. Next, click the search icon and choose the alert code you need to link the contact details to.
 - b. In the **Event** column, specify the Event.
 - c. In the **Email** column, specify the contact person's email ID.
 - d. Click **Add** icon to add contact details for other alert codes and repeat the above steps.
 - e. Click **Edit** icon under the **Action** column to edit the contact details entered.
 - f. Click **Delete** icon under the **Action** column to delete a row.
4. Click **Save** to save the record and send it for authorization.

2.5.2 View Alert Contact Details

This topic describes the systematic instruction to view, modify, or authorize the alert contact details.

A tile is present for each record that has been created. The bottom portion of each record-tile displays the following:

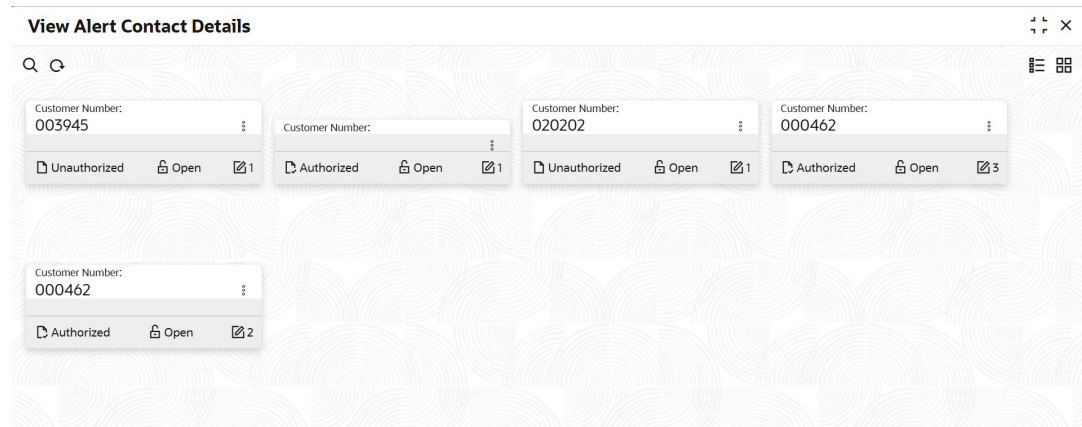
- The status, whether Authorized, Unauthorized, or Rejected.
- Open or Closed.
- The number of times the record has been submitted by the Maker added.

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

1. On **Home** screen, click **Virtual Account Management**. Under **Virtual Account Management**, click **Alerts**. Under **Alerts**, click **Alert Contact Details**. Under **Alert Contact Details**, click **View Alert Contact Details**

The **View Alert Contact Details** screen displays.

Figure 2-10 View Alert Contact Details



2. Filter the records in the **View** screen:
 - a. Click **Search** icon to view the filters. The user can filter the records by Party Id, Authorization Status, and Record Status.
 - b. Select the required filter criteria and click **Search** to filter the records.
 - c. Click **Reset** to reset the filter criteria.
3. Click **Refresh** icon to refresh the records.
4. Click **Options** icon and then select any of the following options:
 - a. **Unlock** – To modify the record details. Refer to the **Create** screen for the field level details.
 - Click **Audit** to view the maker details, checker details of the record.
 - Click **Show History** hyperlink to view the historical data of the record.
 - b. **Authorize** – To authorize or reject the record. Authorizing/Rejecting requires necessary access rights.
 - Optional: Click **View** to view the record details.
 - If there are more than one modifications, Click **Compare** to view the comparison through the field values of old record and the current record.
 - Select the record and click **Approve** to approve the record.
 - Select the record and click **Reject** to reject the record. Specify the relevant comments in the pop-up window that appears, and click **Confirm**.
 - c. **Delete/Close** – To remove the record.
 - Optional: In the confirmation pop-up window, click **View** to view the record details.
 - Click **Proceed** to delete the record.
 - d. **Copy** – To copy the record parameters for creating a new record.
 - e. **View** – To view the record details.

- f. **Reopen** – To reopen the closed record.

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