

Center Creation

Version-1.0

9NT1390 - FCUBS V.UM 11.0.MF.1.0.0.0

[May] [2010]

Oracle Part Number E51714-01

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Document Control

Author: Documentation Team	Group: UBPG	
Created on : March 22, 2010	Revision No : Final	
Updated by : Documentation Team	Reviewed by : Development/Testing teams	Approved by: Software Quality Assurance Team
Updated on : May 10, 2010	Reviewed on : May 10, 2010	Approved on : May 10, 2010

Table of Contents

- 1. ABOUT THIS MANUAL..... 1-1**
 - 1.1 INTRODUCTION..... 1-1
 - 1.1.1 Audience 1-1
 - 1.1.2 Abbreviations..... 1-1
 - 1.1.3 Organization..... 1-1
 - 1.1.4 Conventions Used in this Manual..... 1-1
 - 1.1.5 Related Documents 1-1
 - 1.1.6 Glossary of Icons 1-2

- 2. MICROFINANCE CENTER CREATION..... 2-1**
 - 2.1 INTRODUCTION..... 2-1
 - 2.1.1 Process Flow Diagram..... 2-1
 - Step 1. Input Basic Details of Microfinance Center 2-3
 - Step 2. Capturing Other Details of Microfinance Center..... 2-4
 - Step 3. Center Creation Approval 2-5

1. About this Manual

1.1 Introduction

This manual is designed to help you quickly get acquainted with the basic features of the workflow layer of microfinance center creation.

1.1.1 Audience

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

Role	Function
Corporate Customer Service Executive	Collection of applications
Compliance Executive	Performance of compliance details of all parties in a contract
Compliance Manager	Verification of compliance check carried out by Compliance Executive

1.1.2 Abbreviations

The following abbreviations are used in this User Manual:

Abbreviation	Description
BPEL	Business Process Execution Language
MFi	Micro Finance

1.1.3 Organization

This manual is organized into the following chapters:

Chapter 1	<i>About this Manual</i> gives information on the intended audience. It also lists the various chapters covered in this User Manual
Chapter 2	<i>Microfinance Center Creation</i> explains process of creation of microfinance centers in Oracle FLEXCUBE.

1.1.4 Conventions Used in this Manual




















Important information is preceded with the  symbol.

1.1.5 Related Documents

Micro Finance User Manuals

1.1.6 Glossary of Icons

This User Manual may refer to all or some of the following icons:

Icons	Function
	New
	Copy
	Save
	Delete
	Unlock
	Print
	Close
	Re-open
	Reverse
	Template
	Roll-over
	Hold
	Authorize
	Liquidate
	Exit
	Sign-off
	Help
	Add
	Delete

Refer the Procedures User Manual for further details about the icons.

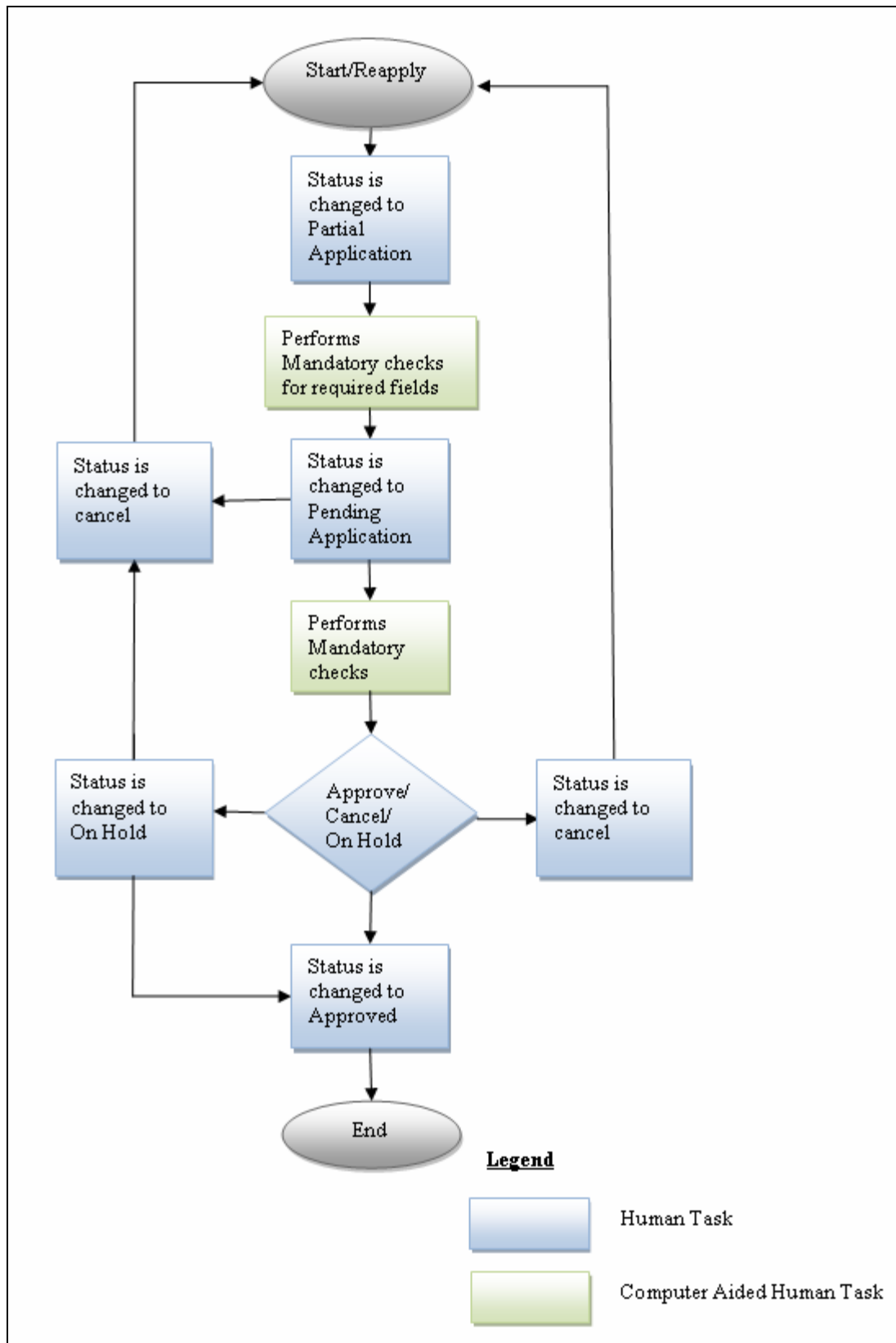
2. Microfinance Center Creation

2.1 Introduction

The process of creation of microfinance center develops through three stages viz. partial application, pending approval and approval. You need to perform specific actions at each of these stages to complete the process of center creation.

2.1.1 Process Flow Diagram

The following diagram illustrates the flow and stages of microfinance center creation:



Step 1. Input Basic Details of Microfinance Center

The process of center creation begins with partial application stage. At this stage, you have to maintain the minimum information required for the creation of a center. You can capture specific details pertaining to the centre using 'MF Center – Input Details Stage' screen. To invoke the screen, type 'MFDCNTR1' in the field at the top right corner of the Application tool bar and click the adjoining arrow button.

The screenshot shows a web application window titled "MF Center - Input Details Stage -- Web Page Dialog". The window contains several input fields and a dropdown menu. The fields are arranged in two columns. The left column includes: "Workflow Reference #" with the value "MFCenterCreation856", "Center Code" with "CENTR1", "User Defined Center Code" with "USRCNT", "Center Name" with "CNAME", and "Center Branch" with "BRN". The right column includes: "Priority" with a dropdown set to "Low", "Center CF ID" with "CFID001", "Account Officer" with "OFFCER1", "MFI Joining Date" with "11/30/2007", and "Center Status" with a dropdown set to "Partial Application". At the bottom of the window, there is a dark blue bar with several buttons and labels: "Checklist", "Document", "Prev Remarks", "Remarks", "Audit", "Outcome" (with a dropdown showing "PARTIALAPPLICATION"), and "Exit".

You can capture the following details on this screen:

Workflow Reference

The system displays the workflow reference number.

Priority

Set the priority of the center creation request. The dropdown list displays the following values:

- Low
- Medium
- High

Choose the appropriate one.

Center Code

The system generates and displays a unique center code.

User Defined Center Code

Specify a user defined center code. In addition to the center code generated by the system, you can use this code to identify the center.

Account Officer

Specify the code that identifies the account officer related to this center. The option list displays all valid account officers maintained in the system. Choose the appropriate one.

Center Name

Enter a name for the center.

Center Branch

Specify the code that identifies the branch of the center. The option list displays all valid branches maintained in the system. Choose the appropriate one.

Center CIF ID

Enter the CIF ID associated with the center.

MFi Joining Date

Specify the date on which the center joined MFi. Click the adjoining button to choose a date from the calendar.

Center Status

Specify the status of the center. At this stage, you need to choose 'Partial Application' as the status. This will be updated in the later stages.

Once you have captured the details, save the maintenance. The partial application will be moved to pending approval stage, where another user will review the information provided and add further details of the center.

Step 2. Capturing Other Details of Microfinance Center

On saving the information entered on 'MF Center – Input Details State' screen, the process will be moved to pending approval stage. At this stage, the system displays 'MFDCNTR2' screen. This screen contains all user input fields.

The screenshot shows a web application window titled "Micro Finance Center Definitions - Web Page Dialog". The interface includes several input fields and a table. The fields are: Workflow Reference #, Priority (Low), Center Code (ZNT10001), User Defined Center Code (CNF002), Center Name (CENTERNAME1), Center CF ID (CNTCF433), Account Officer (OFFICER1), Center Branch (BRN), Source Code (SRCC001), Source Reference (SRCREF001), MFi Joining Date (11/5/2007), and Center Status (Pending Approval). A "Center Formed By" dropdown is set to BANK1. Below these fields is a table with columns "Address Type" and "Details", containing one entry: ADDRESS1 and BANGALORE. The bottom of the window has buttons for "Previous", "Next", "Print", and "Exit".

At pending approval stage, the user needs to either move it to the approval stage or cancel the process.

Step 3. Center Creation Approval

Once the user input data has been saved at pending approval stage, the process continues to the approval stage. This is the final stage of microfinance center creation. Following actions can be taken at this stage:

- **Approve:** If the saved information has been approved, the center will be eligible to open a savings account or apply for a loan or other products offered by the MFi.
- **On hold:** If a center is marked as 'On Hold' it can be approved or cancelled after revision.
- **Cancel:** Cancelled records will be moved back to partial application stage. The user may make necessary changes and save them as partial application.

All approved centers will be listed in the screen 'MFDCENTR' with status as 'Authorized'. You can query the records and perform various operations from this screen.



Microfinance Center Creation
[May] [2010]
Version 1.0

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