Oracle® Banking Branch

Getting Started User Guide

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Oracle Banking Branch Getting Started User Guide, 14.7.4.0.0

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Contents

Preface

Purpose

This guide helps you get started with the Oracle Banking Branch application. It also explains the basic design of the Oracle Banking Branch and the common operations that you can follow while using it.

Audience

This guide is intended for the Branch Tellers, Vault Operators, Branch Supervisors, and staff in charge of setting up new products in the bank.

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.

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.

Related Resources

For more information on any related features, refer to the following documents:

- *Oracle Banking Microservices Platform Foundation User Guide*
- *Oracle Banking Common Core User Guide*
- *Routing Hub Configuration User Guide*
- *Oracle Banking Security Management System User Guide*
- *Teller User Guide*
- *Retail 360 User Guide*
- *Retail Onboarding User Guide*
- *Corporate 360 User Guide*
- *Corporate Onboarding User Guide*
- *Small and Medium Business 360 User Guide*
- *Small and Medium Business Onboarding User Guide*
- *Small and Medium Enterprise 360 User Guide*
- *Small and Medium Enterprise Onboarding User Guide*
- *Servicing Configurations User Guide*
- *Current and Savings Account User Guide*
- *Loan Service User Guide*
- *Deposit Services User Guide*
- *Observability User Guide*
- *Troubleshooting Guide*

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.

Common Icons

The following are the symbols/icons, which are used frequently in the Oracle Banking Branch application.

Table Symbols

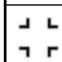
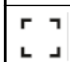
Symbol	Description
	Add a row in the grid.
	Remove a row in the grid.
	Edit a row in the grid
	Navigate to the next page.
	Navigate to the previous page.
	Navigate to the first page.
	Navigate to the last page.
	Minimize screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.
	Maximize screen.
	Closes the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes.

Table Common Icons and their descriptions

Action	Description
Submit	Complete the transaction or request.
Cancel	Cancel the transaction or request.
New	Creates a new record for the selected screen.
Query	View all the required information/configured records for the selected screen.
Unlock	Unlock the configured record for the selected screen.
Search	Search the configured record and select the required record for the selected screen.
Delete	Remove the configured record for the selected screen.
Reopen	Reopens a closed record for the selected screen.
Close	Closes the screen.
Authorize	Authorize the configured record for the selected screen.
Collapse	Minimizes the opened screen to the bottom left corner of the screen.

Table (Cont.) Common Icons and their descriptions

Action	Description
Audit	Check the history of the configured records for the selected screen.
Save	Save the configured record for the selected screen.

1 Getting Started

You can use this guide as a supplement and read it in conjunction with Common Core, Security Management System, and other application user guides.

This topic contains the following subtopics:

- Accessing Application
  You can access the Oracle Banking Branch application using the link provided by the administrator.

1.1 Accessing Application

You can access the Oracle Banking Branch application using the link provided by the administrator.

This topic contains the following subtopics:

- Signing In
  The Oracle Banking Branch application can be accessed using the link provided by the administrator.
- Signing Out
  You can **Sign Out** from the application using the options provided.

1.1.1 Signing In

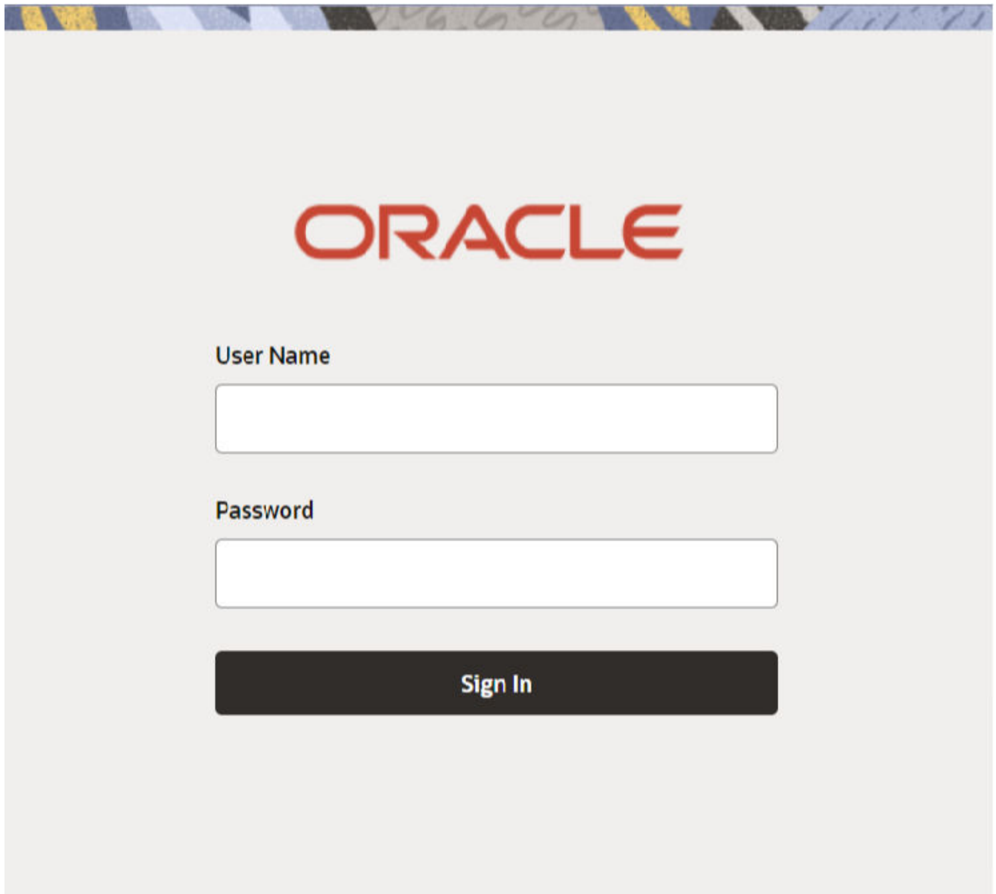
The Oracle Banking Branch application can be accessed using the link provided by the administrator.

You can **Sign In** to the application with the credentials provided by the administrator. To sign in to the application, perform the following steps:

1. Enter the URL in the browser address bar, and press **Enter**.

   The application login page appears.

Figure 1-1 Login Page



2. Specify the **User Name** and **Password** provided by the administrator.
3. Click **Sign In** to log in to the application.

   The application Home page is displayed.

1.1.2 Signing Out

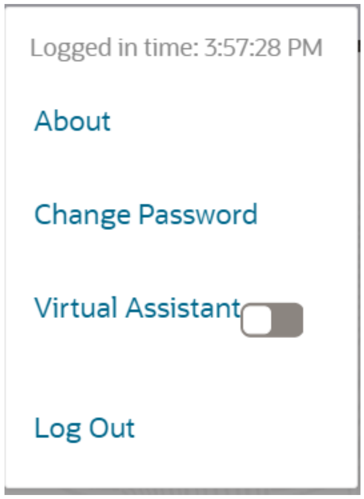
You can **Sign Out** from the application using the options provided.

To sign out of the application, perform the following steps:

1. On the selected application toolbar, click on the user name logged into the application.

   The **User Profile fly-out** menu is displayed.

Figure 1-2 Signing Out



2. Click **Log Out** to sign out of the application.

2
Overview of Application Environment

On successful login, the selected application environment appears depending on the user privileges.

The application environment displays the homepage with the necessary menu items. Sample illustrations of the home page and mega menu are shown below:

Figure 2-1 Application Homepage

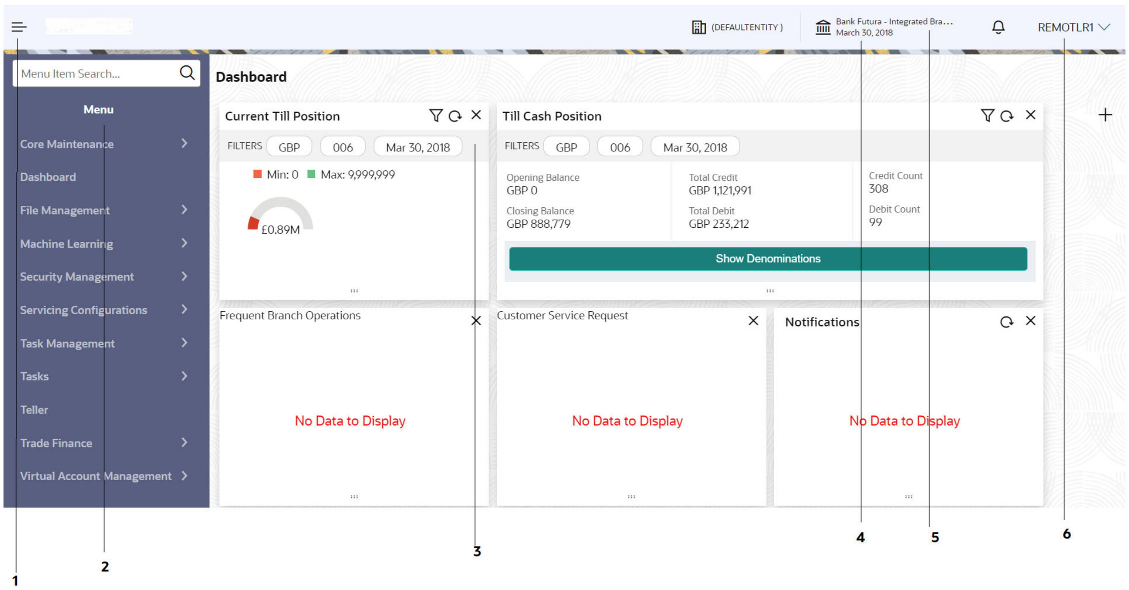
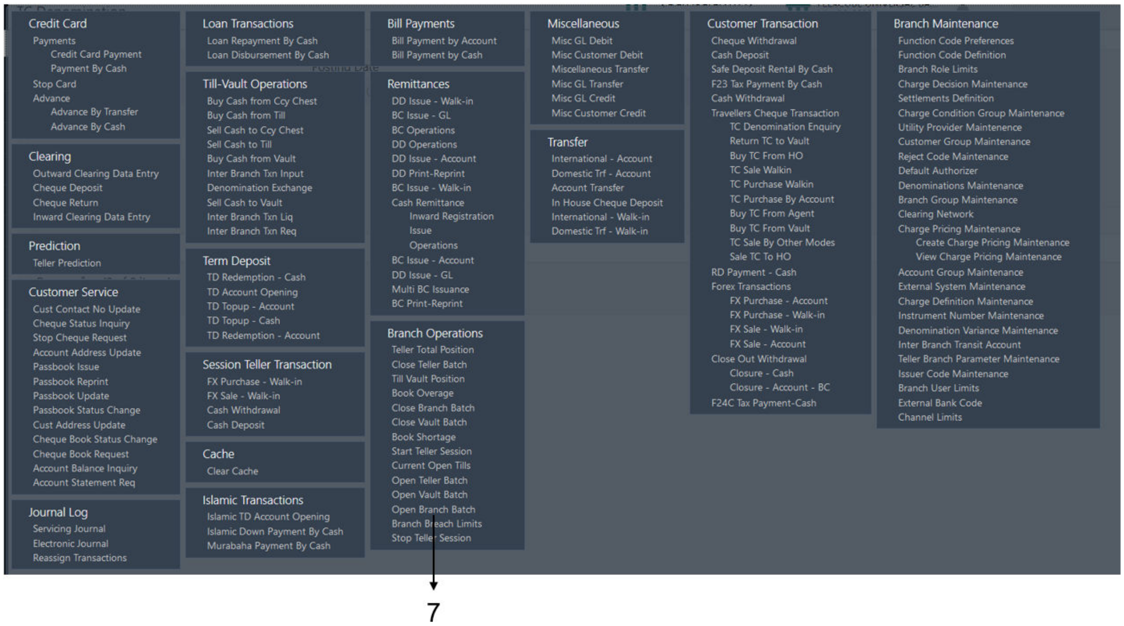


Figure 2-2   Mega Menu



For more information on callouts, refer to the callout details table.

Table 2-1   Application Homepage - Callout Details

Callout	User Interface Term	Description
1	**Hamburger Menu**	Use to expand/collapse the menu.
2	**Menu**	Use to navigate/open the screens associated with the application.
3	**Display Grid**	Displays the screens/dashboards selected using the menu.
4	**Application Date**	Displays the application date on which the branch's EOD was last performed.
5	**Bank Name**	Displays the name of the bank and its branch code. Click to select the branches associated with the logged-in user. • Depending on the logged-in user and the branches associated, you can switch between branches and view the records.
6	**User Profile**	The options and actions related to the user profile are available.
7	**Mega Menu**	Use to open the screens associated with the application.

3

Overview of Screen Environment

Largely, there are several types of screens in the Oracle Banking Branch application. Each type of screen is used to perform certain transactions/operations and to display the details.

This topic contains the following subtopics:

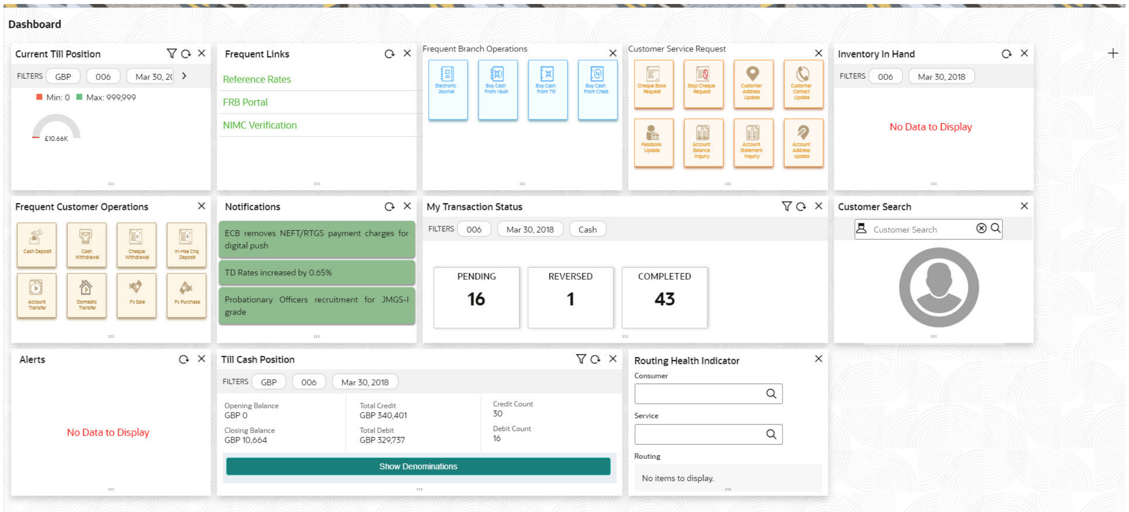
- About Dashboard
  Based on the access/permission provided to the logged-in user, you can view the dashboards associated with the user.
- About Teller Transaction Screen
  Based on the access/permission provided to the logged-in user, you can access a Teller transaction screen.
- About Servicing Transaction Screen
  Based on the access/permission provided to the logged-in user, you can access a Servicing transaction screen.
- About Summary Screen
  Based on the access/permission provided to the logged-in user, you can access a summary screen.
- About Maintenance Screen
  Based on the access/permission provided to the logged-in user, you can access a maintenance screen.
- About Other Screens
  The user can access the screens, which are not categorized under transaction, summary, and maintenance.

3.1 About Dashboard

Based on the access/permission provided to the logged-in user, you can view the dashboards associated with the user.

The dashboard helps the user to analyze the situation and take the necessary actions.

Figure 3-1 Dashboard

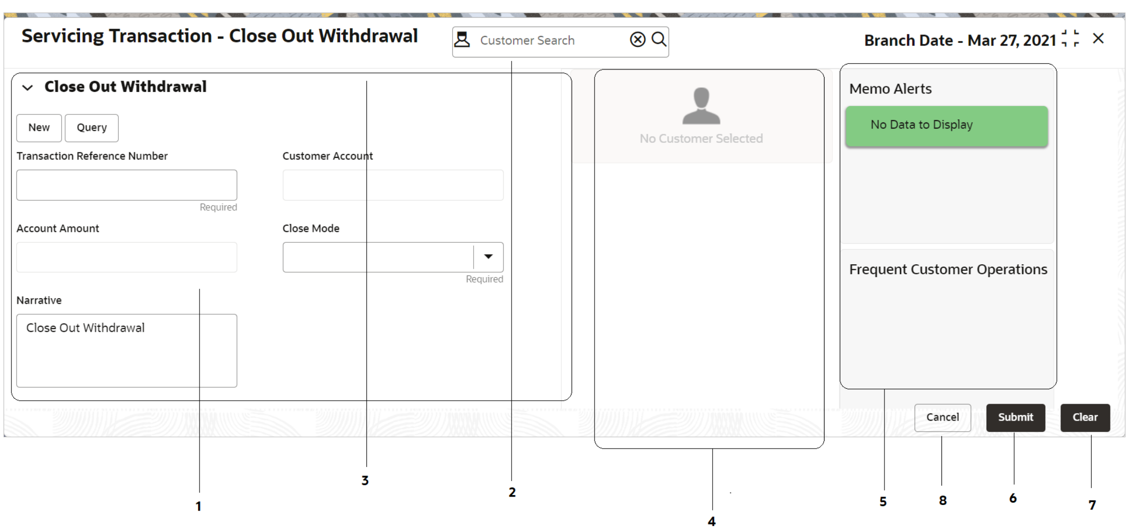


3.2 About Teller Transaction Screen

Based on the access/permission provided to the logged-in user, you can access a Teller transaction screen.

The Teller transaction screen allows you to perform the customer financial transactions; using the fields associated with the selected screen. A sample illustration of a Teller transaction screen is shown below:

Figure 3-2 Teller Transaction Screen



For more information on callouts, refer to the callout details table.

Table 3-1 Teller Transaction Screen-Callout Details

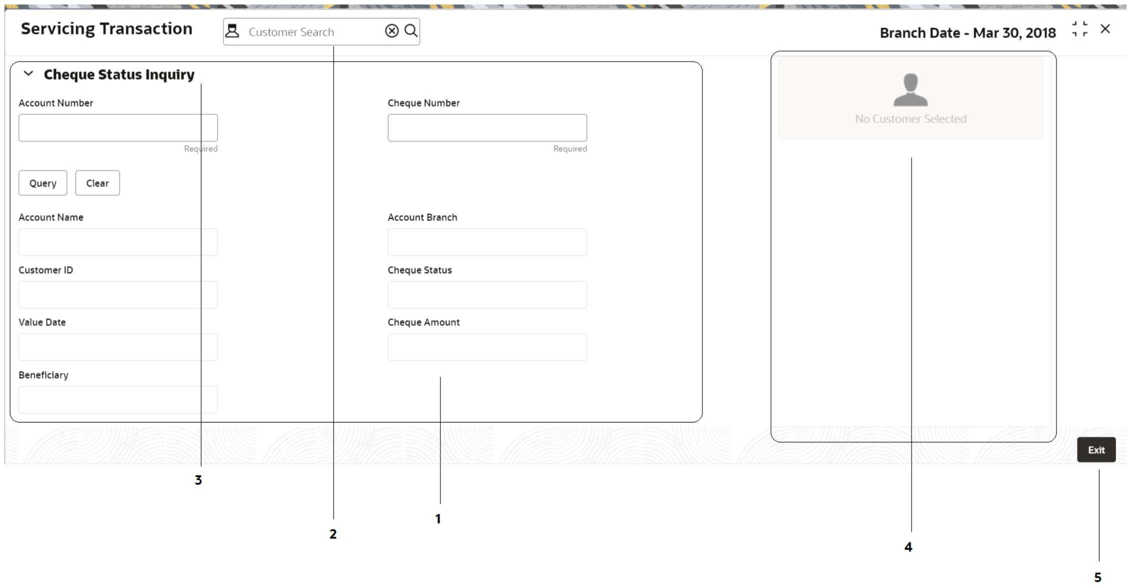
Callout	User Interface Term	Description
1	**Fields and Segments**	Displays the fields and segments associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **Note:** The user can identify the mandatory field with the **Required** text. Once the value is captured, the **Required** text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.
2	**Customer Search**	Used to query and find a specific customer account.
3	**Title Bar**	Displays the name of the transaction.
4	**Customer Information Widget**	Displays the details of account and Customer.
5	**Additional Widgets**	Displays the widgets with the additional information necessary for the users. It includes Current Till Position and Frequent Customer Operations.
6	**Submit**	Click to submit the transaction with the entered details.
7	**Clear**	Click to reset the entered details in the transaction screen.
8	**Cancel**	Click to cancel the transaction.

3.3 About Servicing Transaction Screen

Based on the access/permission provided to the logged-in user, you can access a Servicing transaction screen.

Servicing transaction screen allows you to perform the servicing transactions and customer service transactions; using the fields associated with the selected screen. A sample illustration of a servicing transaction screen is shown below.

Figure 3-3   Servicing Transaction Screen



For more information on callouts, refer to the callout details table.

Table 3-2   Servicing Transaction Screen - Callout Details

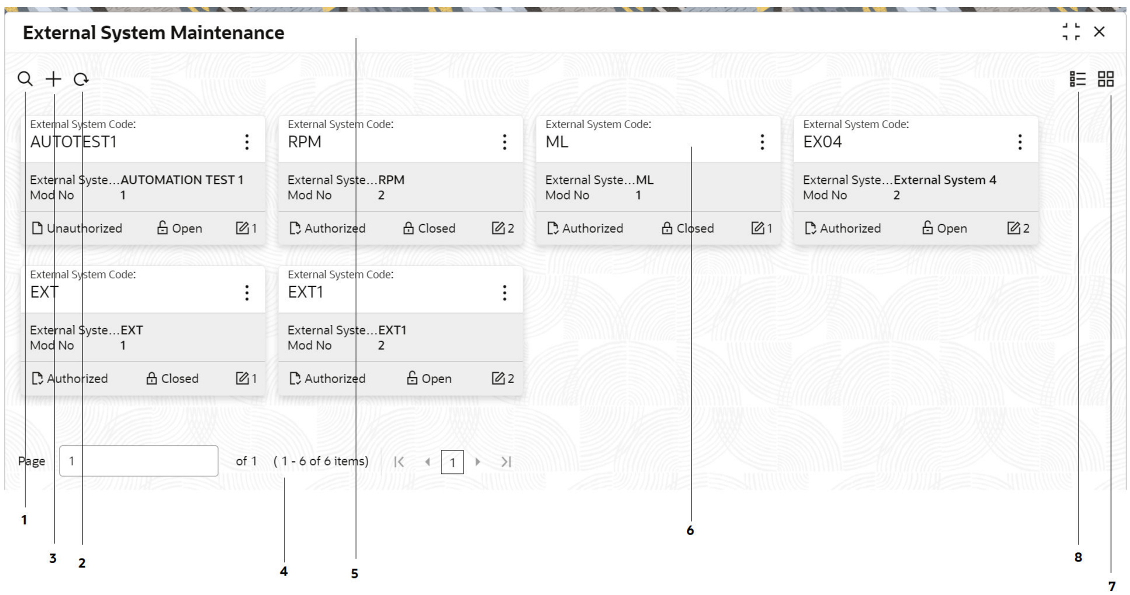
Callout	User Interface Term	Description
1	**Fields**	Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **Note:** The user can identify the mandatory field with the **Required** text. Once the value is captured, the **Required** text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.
2	**Customer Search**	Used to query and find a specific customer account.
3	**Title Bar**	Displays the name of the transaction.
4	**Customer Information Widget**	Displays the details of account and Customer.
5	**Exit**	Click to exit from the transaction screen.

3.4 About Summary Screen

Based on the access/permission provided to the logged-in user, you can access a summary screen.

The summary screen provides information about the configured records; you can perform a few common actions and view the records. A sample illustration of a summary screen is shown below.

Figure 3-4   Summary Screen



For more information on callouts, refer to the callout details table.

Table 3-3   Summary Screen - Callout Details

Callout	User Interface Term	Description
1	**Search**	Click to search/view a record from a selected summary screen.
2	**Refresh**	Click to refresh all records configured in the selected summary screen.
3	**Add**	Click to create/configure a new record.
4	**Pagination**	Displays the number of items available and the page numbers.
5	**Title Bar**	Displays the name of the screen and a couple of common actions such as minimize and remove. For more information, see Minimizing Records and Closing Records.
6	**Records**	Displays the configured records. You can view the records in a different format. For more information, see *View Records*.

Table 3-3 (Cont.) Summary Screen - Callout Details

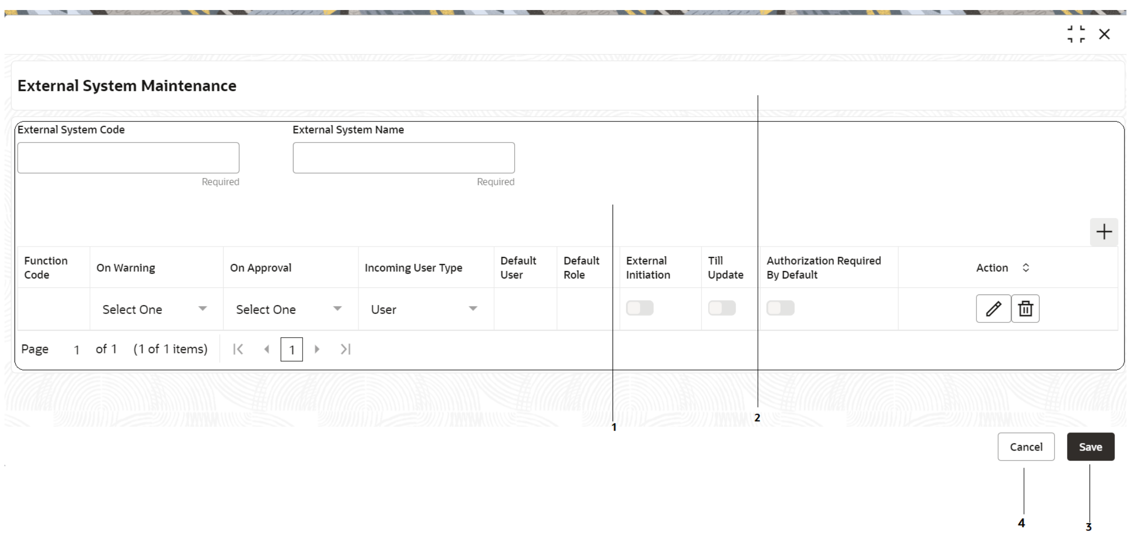
Callout	User Interface Term	Description
7	Tile View	Displays the configured records in the tile format.
8	List View	Displays the configured records in the list format.

3.5 About Maintenance Screen

Based on the access/permission provided to the logged-in user, you can access a maintenance screen.

The maintenance screen allows you to create/configure new records; using the fields associated with the selected maintenance screen, you can save a new record. A sample illustration of a maintenance screen is shown below.

Figure 3-5 Maintenance Screen



For more information on callouts, refer to the callout details table.

Table 3-4 Maintenance Screen - Callout Details

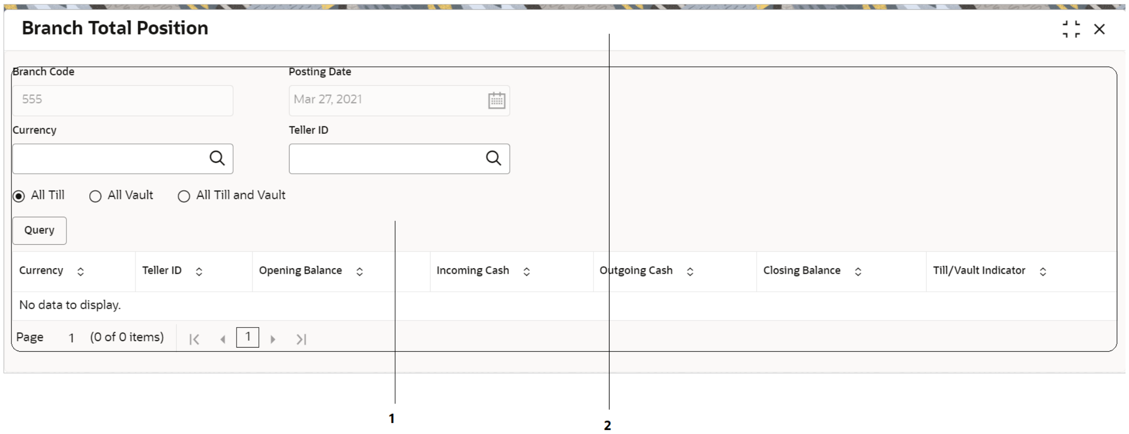
Callout/Area	User Interface Term	Description
1	**Fields**	Displays the fields associated with the selected maintenance screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **Note:** The user can identify the mandatory field with the **Required** text. Once the value is captured, the **Required** text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.
2	**Title Bar**	Displays the name of the screen and a couple of common actions such as minimize and remove. For more information, see Minimize Records and Close Records.
3	**Save**	Click to save the entered details on the maintenance screen.
4	**Cancel**	Click to reset the entered details on the maintenance screen.
5	**Audit**	Click to check the history of the configured records in the maintenance screen.

3.6 About Other Screens

The user can access the screens, which are not categorized under transaction, summary, and maintenance.

The screens, which are not categorized under transaction, summary, and maintenance, are used to perform certain operations; using the fields associated with the selected screen. A sample illustration of a screen is shown below.

Figure 3-6 Other Screens



For more information on callouts, refer to the callout details table.

Table 3-5 Other Screens - Callout Details

Callout	User Interface Term	Description
1	**Fields**	Displays the fields associated with the selected servicing screen. There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. **Note:** The user can identify the mandatory field with the **Required** text. Once the value is captured, the **Required** text will disappear. If the user tries to save the record without providing all the mandatory fields, the fields are highlighted with the error message at the bottom.
2	**Title Bar**	Displays the name of the screen.

4 How Tos

As a new user, you might require to perform a set of tasks such as transactions, operations, and maintenance that is similar on all the screens.

This topic contains the following subtopics:

- Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations
  You can access the transaction screens based on the permissions/rights provided for the logged-in user.
- Perform Maintenance
  You can access the maintenance screens based on the permissions/rights provided for the logged-in user.
- Configure Dashboard
  You can configure Dashboard to add, remove, or reorder a widget based on the requirements.

4.1 Perform Customer Financial Transactions, Customer Servicing Transactions, and Branch Operations

You can access the transaction screens based on the permissions/rights provided for the logged-in user.

Before you begin, log in to the application homepage. For information on how to log in, refer to Signing In.

To perform the transactions:

1. On the menu (by default, the hamburger menu is expanded), click on the desired menu item. In the Mega Menu, click <name of the screen>, or specify <name of the screen> in the search icon bar.

   The screen associated with the menu is displayed.

2. Once the screen is displayed, enter/query the necessary details in the fields and submit the transaction.

   There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see *Mandatory and Optional Fields*.

   After submitting a transaction, you can perform one of the following actions:

   Table 4-1 Description of Transaction Actions

Action	Description
Authorize	Used to authorize a transaction.
Reject	Used to reject an authorized transaction.

Table 4-1 (Cont.) Description of Transaction Actions

Action	Description
Re-submit	Used to re-submit a transaction.

In addition, the following options are available:

Table 4-2 Description of Common Actions

Action	Description
Minimize Screen	On the selected screen, click the icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.
Close Screen	On the selected screen, click the icon to close the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes.

4.2 Perform Maintenance

You can access the maintenance screens based on the permissions/rights provided for the logged-in user.

Before you begin, log in to the application homepage. For information on how to log in, refer to Signing In.

To perform the maintenance:

1. On the menu (by default, the hamburger menu is expanded), click on the desired menu item.
2. In the Mega Menu, click <name of the screen>, or specify <name of the screen> in the search icon bar.

   The screen associated with the menu is displayed.
3. On the summary screen, click the icon to navigate to the new screen, enter the necessary details in the fields, and create a new record.

   There are several types of fields such as text box, dropdown, and so on, these fields can also be either mandatory or options fields. For more information, see *Mandatory and Optional Fields*.

   When you are working with records, it is important to remember that the types of records you can create, view, edit, delete, and so on are determined by administrator settings, such as a user profile or permission set. Work with your administrator to ensure you have access to the records and data you need.

- Common Tasks in Maintenance Screens
  You can perform one or more of the common tasks in the maintenance screens based on the requirement.

4.2.1 Common Tasks in Maintenance Screens

You can perform one or more of the common tasks in the maintenance screens based on the requirement.

Now, that you have learned how to work with your records, you might want to explore more advanced features:

- Search Records
- Create/Configure Records
- Copy Records
- Reopen Records
- Print Records
- Minimize Records
- Audit Records
- View Records
- Refresh Records
- Pagination
- Edit Records
- Unlock Records
- Delete Records
- Authorize Records
- Close Records

The common tasks are as follows:

Table 4-3 Common Tasks in Maintenance Screens

Feature	Description
View Records	You can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster. A few different formats to view the records are described in the following topics. • **Tile View** - The default summary view of the records is tile view. Displays the configured records in a tile format with a few key fields that are associated with the screen. You can click a tile to open a record on a full screen and view the details. A sample is shown in Figure 4-1. • **List View** - Displays the configured records in a list format. In the selected screen, click the icon on the action toolbar as illustrated to view the details. A sample is shown in Figure 4-2.

Table 4-3 (Cont.) Common Tasks in Maintenance Screens

Feature	Description
Search Records	To search for records based on specific criteria: 1. On the selected screen, click the icon. The fields associated with the selected screen displays in a drop-down menu. 2. Specify the required details associated with the selected screen. 3. Click **Search** to view the requested record. A sample screen for search records is shown in Figure 4-3.
Pagination	The number of records is displayed on the bottom left corner of the selected view screen. Depending on the records available, the number of pages appears. You can navigate to the first page, last page, previous page, or next page by using the number icons.
Refresh Records	On the selected screen, click the icon, the records associated with the selected screen are updated with the latest details.
Create/Configure Records	To create/configure records in one of the three ways: 1. On the selected view screen, click **Add** to create/configure a record. 2. On the selected view screen, click on a configured record. 3. Click **New** to create/configure a record. 4. On the menu, select a sub-menu, and click <Create the name of the screen>.
Edit Records	To edit a record: **Note:** Ensure you have the privileges and know the guidelines to modify the records. 1. On the selected screen, click a record and make the required changes to the record. 2. Click **Save** to save the modified record.
Copy Records	To copy a record: 1. On the selected screen, click a record. 2. Click **Copy** to copy the selected record details and make the required changes to the record such as name. 3. Click **Save** to save the modified record.
Unlock Records	To unlock a record: 1. On the selected screen, click a record. 2. Click **Unlock** to unlock the selected record details and make the required changes to the record such as name. 3. Click **Save** to save the modified record.

Table 4-3 (Cont.) Common Tasks in Maintenance Screens

Feature	Description
Reopen Records	To re-open a record: 1. On the selected screen, click a record. 2. Click **Reopen**, a confirmation popup appears. 3. Provide a remark and click **Confirm** to reopen the record.
Delete Records	On the selected screen, select a record and click **Delete** to remove the record. **Note:** Ensure you have the privileges and know the guidelines to delete the records.
Print Records	To print a record: 1. On the selected screen, click a record. 2. Click **Print** to view the record in a print format and print the records.
Authorize Records	To authorize a record: 1. On the selected screen, click a record. 2. Click **Authorize** and the records associated with the selected screen that must be authorized appears. 3. Select the required record that must be authorized. 4. Click **Approve**, and a confirmation popup appears. A sample screen to select an unauthorized record shown in Figure 4-4 5. Provide a remark and click **Confirm** to authorize the record. A confirmation popup screen to provide a remark is shown in Figure 4-5
Minimize Records	On the selected screen, click the icon to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click again to maximize the screen.
Close Records	On the selected screen, click the icon to close the screen. If you are in the middle of creating/modifying the records in a selected screen, an error/warning message appears prompting you to save the changes.

Table 4-3 (Cont.) Common Tasks in Maintenance Screens

Feature	Description
Audit Records	To audit a record: 1. On the selected screen, click **Audit** to view the change history of the record. The audit detail popup is displayed. A sample screen to audit record is shown in Figure 4-6. 2. Click **Show History** to view the modification history of the record. A sample screen to view the modification history is shown in Figure 4-7 3. Click **Back** to navigate to the previous screen. 4. Click anywhere on the screen to close the audit detail popup.

Figure 4-1 Tile View

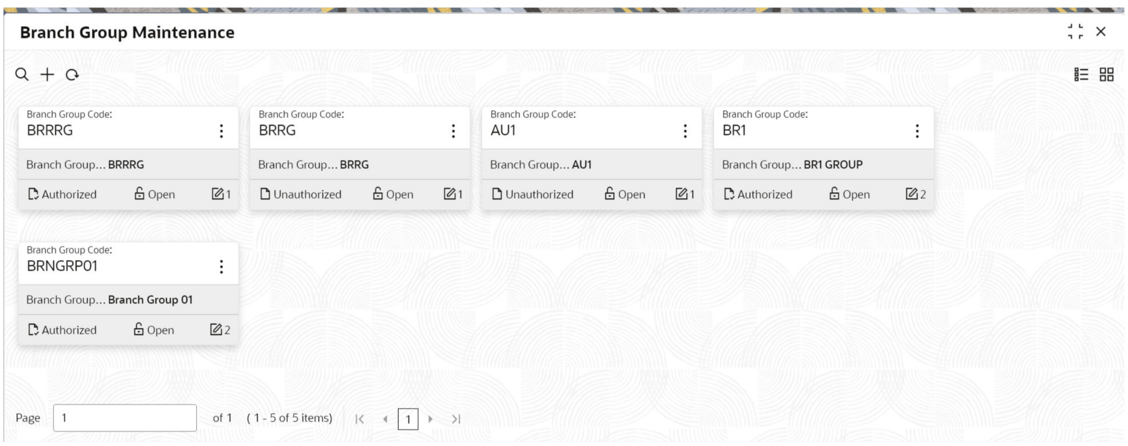


Figure 4-2 List View

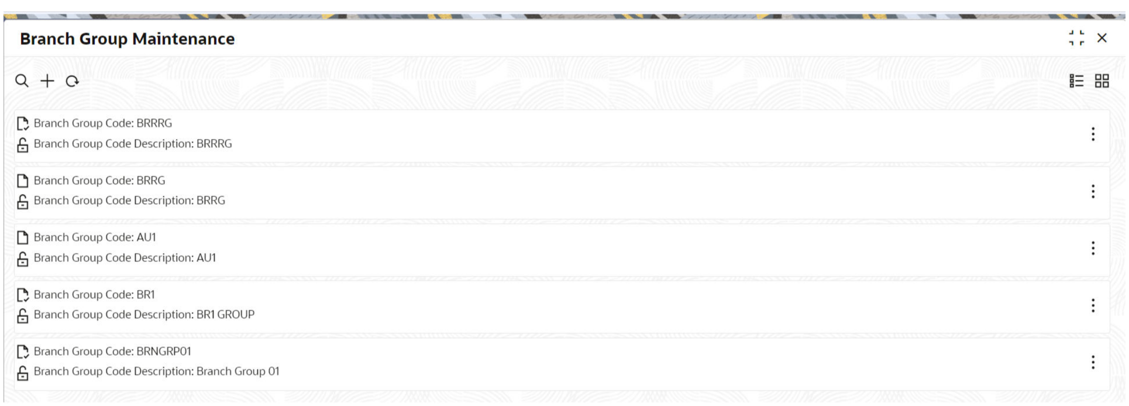


Figure 4-3 Search Records

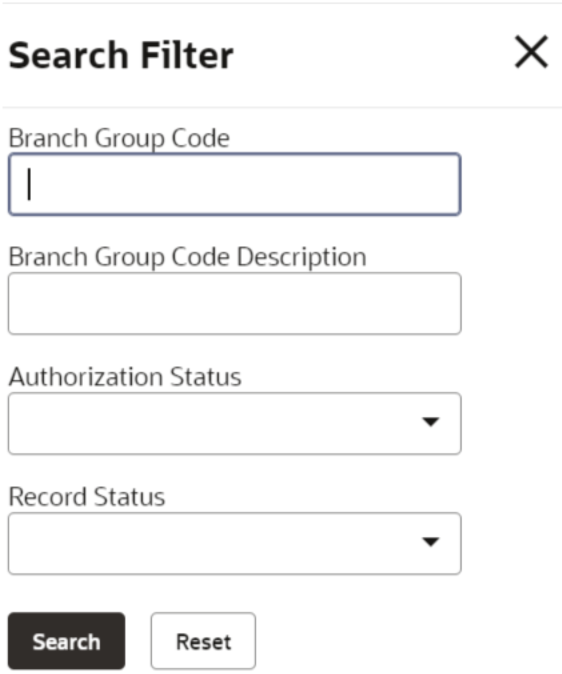


Figure 4-4 Authorize Records

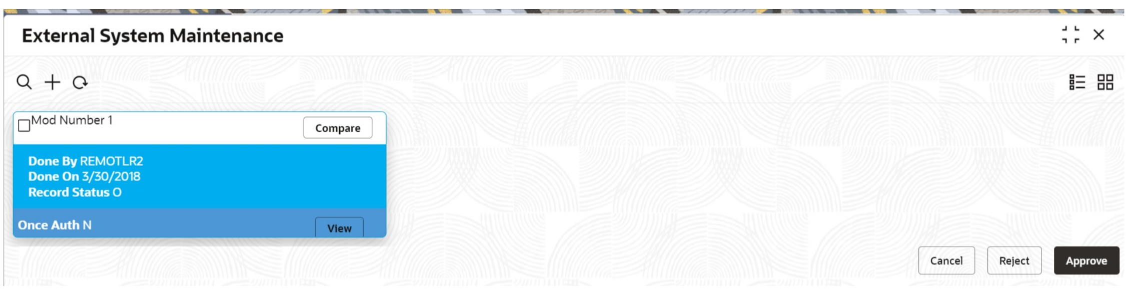


Figure 4-5 Confirm Authorization

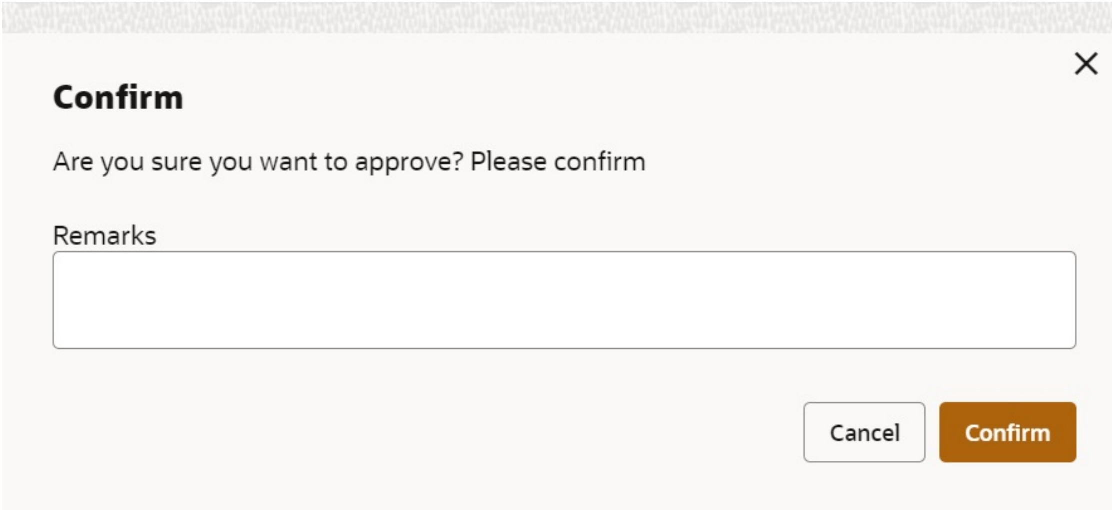


Figure 4-6 Audit Records

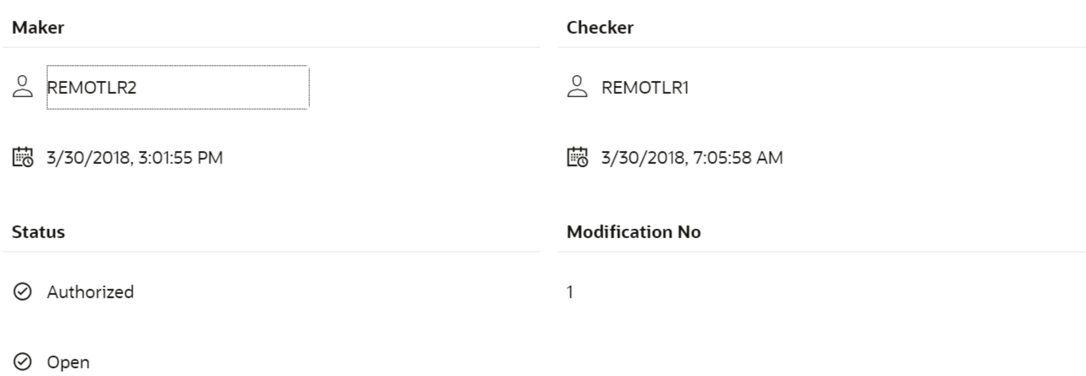
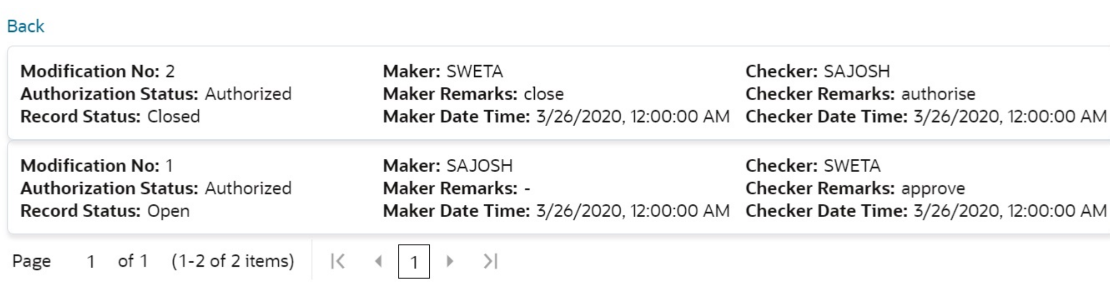


Figure 4-7 Modification History



4.3 Configure Dashboard

You can configure Dashboard to add, remove, or reorder a widget based on the requirements.

- To configure a tile, perform the following steps:

1. On the Dashboard, click **Configure Tile**.

   The **Configure Dashboard Tile popup** page appears.
2. Select one of the following options:

   Allow the user to...

   Table 4-4 Options and their Descriptions

Option	Description
Insert or Remove the tile	If selected, you can remove the dashboard widget from the dashboard-landing page.
Reorder the tile	If selected, you can rearrange the dashboard widget on the dashboard-landing page.

   Put the tile into other states:

   Table 4-5 Tile States and their Descriptions

State	Description
Flipped	If selected, you can flip the dashboard widget for more information.
Expanded	If selected, you can expand the dashboard widget on the Dashboard landing page.
Flipped and Expanded at the same time	If selected, you can flip and expand the dashboard widget on the Dashboard landing page.

3. Click **Close** to update the dashboard widget configuration.

- To remove the dashboard widget from the landing page, click the **Remove** icon.

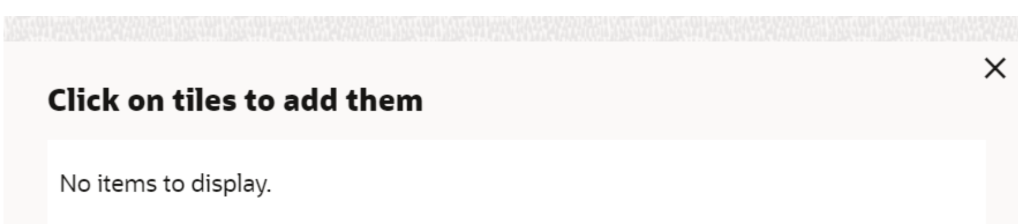
  The removed widgets are available under the Add Tiles option.
- To drop the dashboard widget at the desired place, select and drag the **Drag to Reorder** icon.

  The page is automatically refreshed and displays the updated order.
- To view all the information on the dashboard widget, click **Expand Tile**.

  The expanded widget appears on a complete row to view more information.
- To add a tile, perform the following steps:
  1. Click **Add Tiles to Dashboard** to add more available Dashboard widgets to the dashboard-landing page.

     The **Click on tiles to add them** popup screen appears.

     Figure 4-8 Add Tiles



2. Click on the dashboard to add to the dashboard-landing page.

   The page is automatically refreshed and displays the added dashboard widget.

Glossary

Display Grid

It is a container that consists of fields and action buttons, which allows you to view/perform actions.

Hamburger Menu

It is placed in the top-left corner of the application. You can click to access the menu and sub-menu associated with the application.

Mega Menu

A large panel is divided into groups of menu items, which simplifies the navigation. The menu items are grouped based on the type of transaction/operation.

Menu

It is a list of features that are organized for easy access. Generally, there are several sub-menus associated with a menu; each sub-menu has a set of features either in a sequence or non-sequence manner.

Records

It is a piece of information that is configured using the application.

Sign In

Log in to an application to access the application/records.

Sign Out

Log out/leave the application.

User Profile

Provides information associated with the logged-in user and provides a few actions that a user can perform.

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