

Oracle® Banking Cash Management

Oracle Banking Getting Started User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

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Purpose

This guide helps to get started with Oracle Banking applications. It explains the basic design of Oracle and the common operations that can follow while using it. The guide must be used as a supplement and read in conjunction with Common Core, Security Management System, and other application user guides.

Audience

This guide is intended for the Customer Service Representatives (CSR) and staff responsible for setting up the new products in the bank.

List of Topics

This guide is organized as follows:

Table 1 List of Topics

Topics	Description
Access Application	This topic provides the information about the installation of different kinds of services.
Application Environment	This topic provides the information about the different types of screen environment.
How to's	This topic provides the information about how to access the screens.
Screen / Dashboard	This topic provides the information about the Screens / Dashboard.
Common Fields	This topic provides the information about the common fields.
Common Buttons/Icons	This topic provides the information about the common buttons.

1

Access Application

The user can access any application using the link provided by the administrator. Please contact the administrator for URL and the login credentials.

For more information on Users and Roles, refer to ***Oracle Banking Security Management System User Guide***.

- [Sign In](#)
This topic describes the systematic instruction to sign in to the application.
- [Sign Out](#)
This topic describes the systematic instruction to log out from the application.

1.1 Sign In

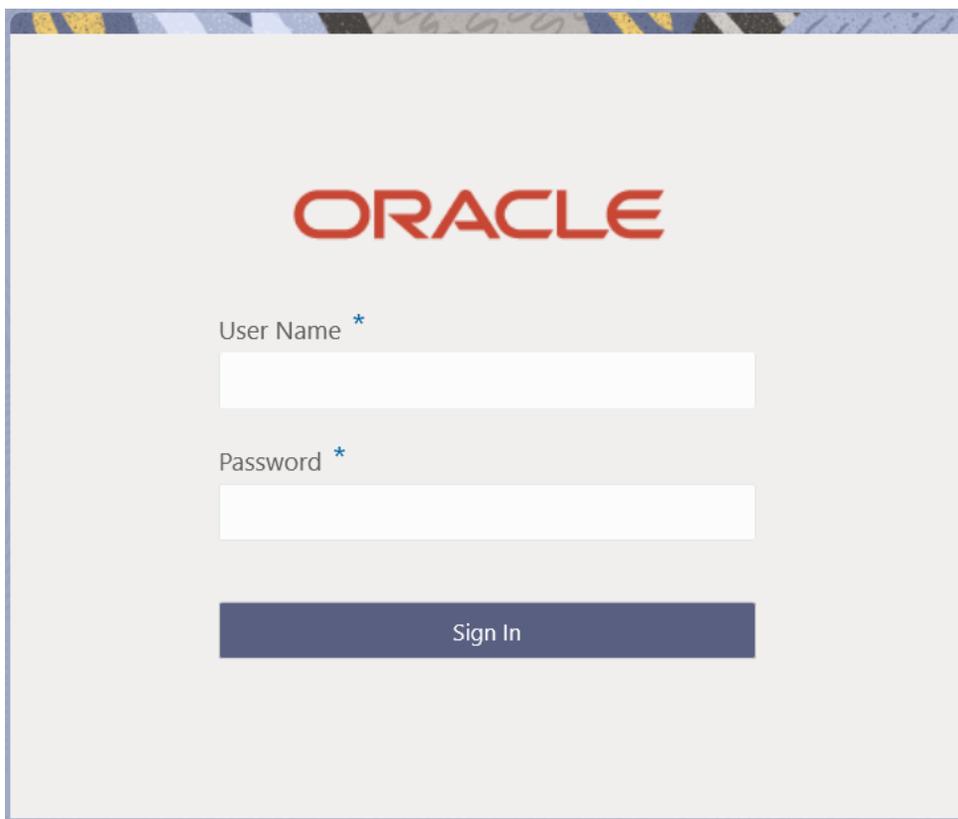
This topic describes the systematic instruction to sign in to the application.

Make sure that the valid user name and password is created for the user.

1. Specify the URL in the browser address and press **Enter**.

The **Sign In** screen displays.

Figure 1-1 Sign In



The screenshot shows the Oracle Sign In interface. At the top, the Oracle logo is displayed in red. Below the logo, the text 'User Name *' is followed by a white input field. Underneath that, the text 'Password *' is followed by another white input field. At the bottom of the form area, there is a dark blue button with the text 'Sign In' in white.

2. Specify the required fields on **Sign In** screen.
For more information on fields, refer to the field description table.

Table 1-1 Sign In – Field Description

Field	Description
User Name	Specify the user name provided by the administrator.
Password	Specify the password provided by the administrator.

3. Click **Sign In** to login to the application.
The **Home** screen displays.

1.2 Sign Out

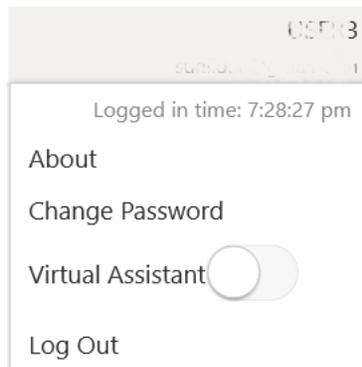
This topic describes the systematic instruction to log out from the application.

Make sure that all the fields are entered and saved.

1. In the selected application, navigate to toolbar.
2. From toolbar, click on the user name logged into the application.

The **User Profile** fly-out screen displays.

Figure 1-2 User Profile



3. Click **Log Out** to sign out from the application.
The application logs out.

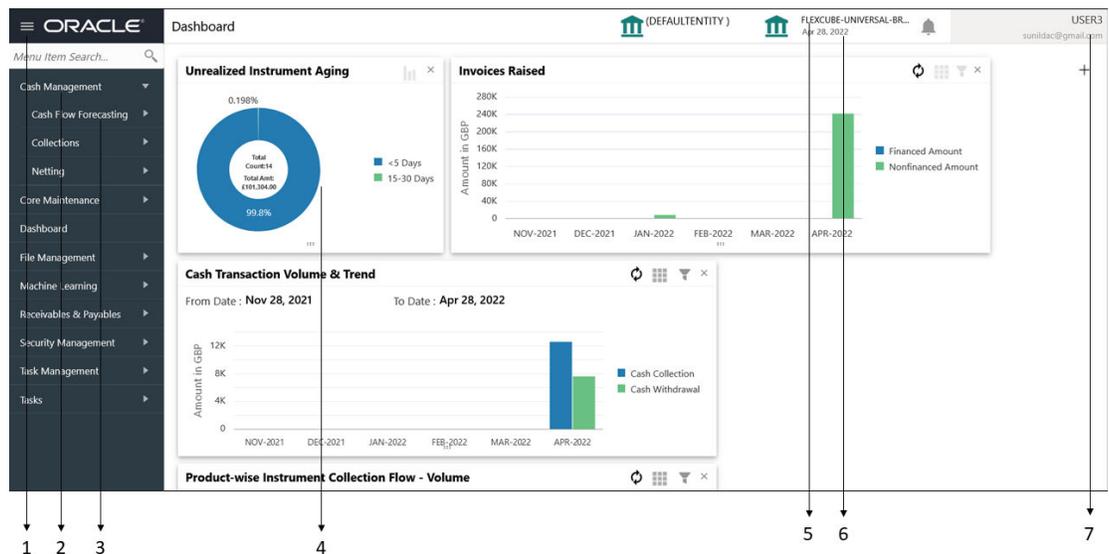
2

Application Environment

This topic describes about the various fields available in the application environment.

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

Figure 2-1 Application Environment



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

Table 2-1 Application Environment – Field Description

Field	Description
Hamburger Menu	Click to expand/collapse the menu.
Menu	Click to navigate/open the screens associated with the application.
Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards.

Table 2-1 (Cont.) Application Environment – Field Description

Field	Description
Bank Name	<p>Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user.</p> <div data-bbox="906 432 1458 634"> Note: Depending on the logged in user and the branches associated, the user can switch between branches and view the records.</div>
Application Date	Displays the last performed application date of branch's EOD.
User Profile	Displays the user profile related options and actions.

3

How to's

This topic describes about the different types of actions that the user can perform.

As a new user, the user need to perform a set of tasks that are similar in all the screens such as view, edit, delete existing records, and more.

When the user is working with records, it is important to remember that any records that user create, view, edit, delete, and more are determined by administrator settings such as user profile or permission set. Work with the administrator to ensure that the user have access to the records and data.

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

- [View the Records](#)
This topic describes about the various formats to view the records.
- [Search the Records](#)
This topic describes the systematic instruction to search the records.
- [Access the Records](#)
This topic describes the systematic instruction to access the records.
- [Refresh the Records](#)
This topic describes the systematic instruction to refresh the records.
- [Create / Configure the Records](#)
This topic describes the systematic instruction to create / configure the records.
- [Copy the Records](#)
This topic describes the systematic instruction to copy the record.
- [Unlock the Records](#)
This topic describes the systematic instruction to unlock the record.
- [Reopen the Records](#)
This topic describes the systematic instruction to reopen the record.
- [Delete the Records](#)
This topic describes the systematic instruction to delete the record.
- [Print the Records](#)
This topic describes the systematic instruction to print the record.
- [Authorize the Records](#)
This topic describes the systematic instruction to authorize the record.
- [Minimize and Maximize the Records](#)
This topic describes the systematic instruction to minimize and maximize the records.
- [Close the Records](#)
This topic describes the systematic instruction to close the record.
- [Audit the Records](#)
This topic describes the systematic instruction to audit the record.

3.1 View the Records

This topic describes about the various formats to view the records.

The user can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster.

The various formats to view the records are as follows:

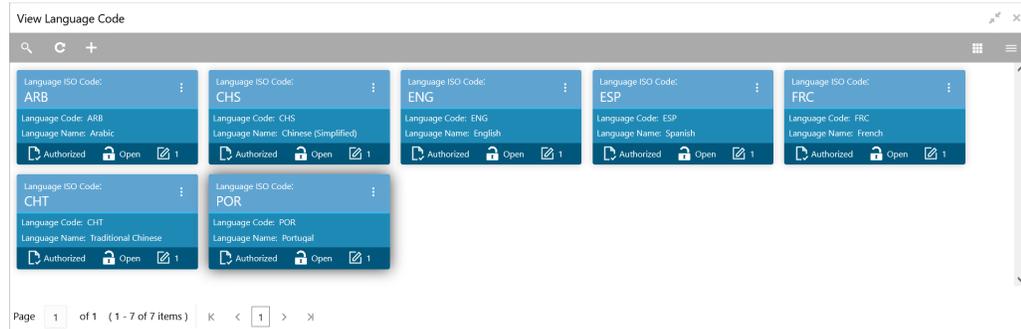
- [Tile View](#)
This topic describes the information to view the records in tile view.
- [Tile View with Context Menu](#)
This topic describes the information to view the records in tile view with context menu.
- [List View](#)
This topic describes the systematic instruction to view the configured records in list format.

3.1.1 Tile View

This topic describes the information to view the records in tile view.

The default summary view of the records are tile view. Displays the configured records in a tile format with few key fields that are associated with the screen. The user can click a tile to open a record in a full screen and view the details.

Figure 3-1 Tile View



3.1.2 Tile View with Context Menu

This topic describes the information to view the records in tile view with context menu.

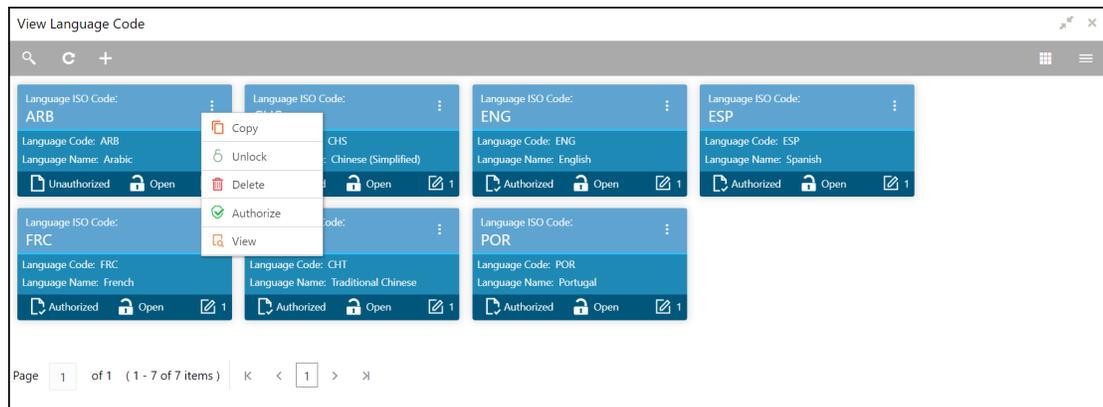
Tile view with context menu is similar to any tile view summary record. The context menu allows the user to perform any actions that are associated with the records.

The content menu is available for:

- View Accounting Role
- View Entry Code

- View Accounting Entries
- View Internal Account Mapping
- View Arrangement Definition
- View Arrangement Decisioning
- View Corporate Enrichment
- View Charge Code
- View Charge Rule
- View Charge Decisioning
- View Charge Preferential Pricing
- View Cash Denomination
- View Courier Setup
- View Location
- View Location Cluster
- View Product Definition
- View Alert Contact Details
- View Alert Definition
- View Alert Decisioning

Figure 3-2 Tile View with Context Menu



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

Table 3-1 Tile View with Context Menu - Field Description

Field	Description
Context Menu	This button appears only to a select the number of screens. The context menu allows the user to perform actions that are associated with the record.

Table 3-1 (Cont.) Tile View with Context Menu - Field Description

Field	Description
Context Menu Flyout	A list of all actions appears. The list of actions depend on the status of the record.

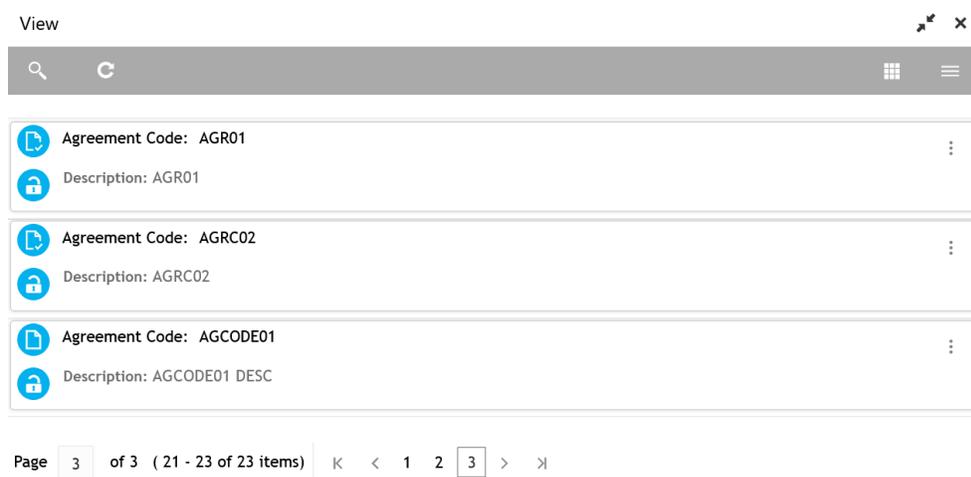
3.1.3 List View

This topic describes the systematic instruction to view the configured records in list format.

1. Navigate to **View** screen.
2. Click **List View** on the action toolbar to view the details.

The **List View** screen displays with the details.

Figure 3-3 List View



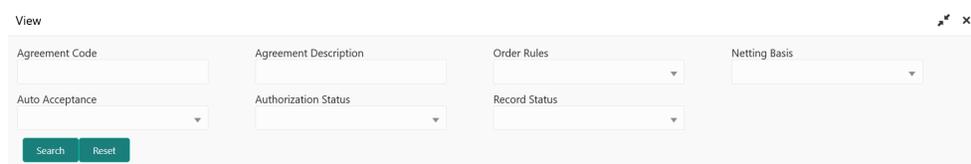
3.2 Search the Records

This topic describes the systematic instruction to search the records.

1. Navigate to **Summary - Maintenance** screen.
2. Click **Search** button.

The fields associated with the screen displays.

Figure 3-4 Search - Maintenance



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

Table 3-2 Search - Field Description

Field	Description
<Specific Search Parameters>	Specify the applicable search parameters for the respective summary screen.
Authorization Status	Select the authorization status to filter the records. The available options are: <ul style="list-style-type: none"> • Authorized • Unauthorized • Rejected
Record Status	Select the record status to filter the records. The available options are: <ul style="list-style-type: none"> • Open • In Progress • Closed

3. Specify the required fields.
4. Click **Search**.

The requested record displays.

3.3 Access the Records

This topic describes the systematic instruction to access the records.

The user can access the screens on the permissions/rights provided for the user.

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

1. Navigate to the hamburger menu.

By default, the hamburger menu is expanded.

2. Click <sub-menu>, and click <name of the screen>.

The screens associated with the sub-menu displays.

3. Click Create <name of the screen>.

The Create <name of the screen> screen displays. The user can create/configure the new records.

4. Click View <name of the screen>.

The View <name of the screen> screen displays. The user can view the configured records.

3.4 Refresh the Records

This topic describes the systematic instruction to refresh the records.

1. Navigate to **Summary** screen.
2. Click **Refresh** button.

The records associated with the screen is updated with the latest details.

3.5 Create / Configure the Records

This topic describes the systematic instruction to create / configure the records.

The user can create / configure records in any of the two ways:

1. In the selected **Summary** screen, click **Add** to create / configure a record.
2. On the **menu**, select a **sub-menu** and click **<Create name of the screen>**.

The **Create Host Code** screen shown for reference.

Figure 3-5 Create Host Code

3. Specify the required details in the respective fields.
4. Click **Save**.

The **Save - Confirmation Message** popup screen displays.

Figure 3-6 Save - Confirmation Message

5. Specify the remarks on the **Remarks** field.
6. Click **Confirm** to save the details.

The record is created and the maker remarks can be viewed in **Audit** screen. Refer [Audit the Records](#) topic for the detailed explanation.

7. Click **Cancel** to discard the changes.

3.6 Copy the Records

This topic describes the systematic instruction to copy the record.

1. Navigate to **Summary** screen.
2. Click the record that need to copy.
3. Click **Copy** to copy the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

3.7 Unlock the Records

This topic describes the systematic instruction to unlock the record.

1. Navigate to **Summary** screen.
2. Click the record that need to unlock.
3. Click **Unlock** to unlock the selected record details and do the required changes to the record.
4. Click **Save**.

The modified record is saved.

3.8 Reopen the Records

This topic describes the systematic instruction to reopen the record.

1. Navigate to **Summary** screen.
2. Click on the record that need to reopen.
3. Click **Reopen**.

The **Confirmation** screen displays.

4. Specify a remark.
5. Click **Confirm** to reopen the record.

3.9 Delete the Records

This topic describes the systematic instruction to delete the record.



Note:

Make sure that the user have privileges and know the guidelines to delete the records.

1. Navigate to **Summary** screen.
2. Click the record that needs to be deleted.
3. Click **Delete**.

The selected record is deleted.

3.10 Print the Records

This topic describes the systematic instruction to print the record.

1. Navigate to **Summary** screen.
2. Click the record that needs to be printed.
3. Click **Print** to view the record in a print format.

The selected record is printed.

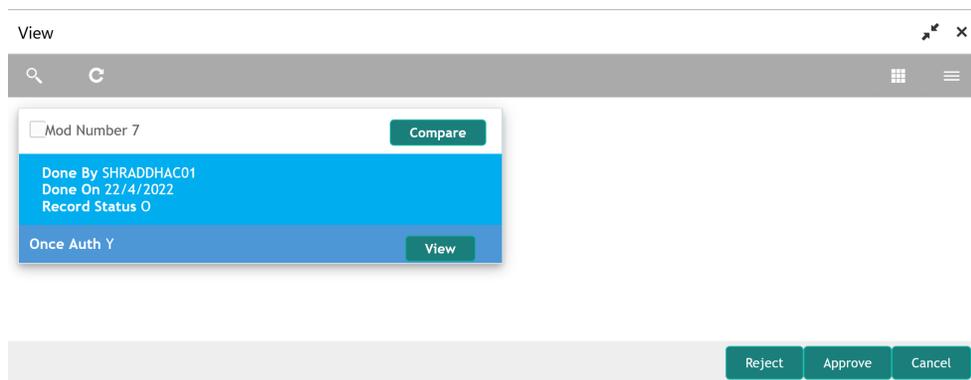
3.11 Authorize the Records

This topic describes the systematic instruction to authorize the record.

1. Navigate to **Summary - Maintenance** screen.
2. Click  icon on the unauthorized record which needs to be actioned.
3. Click **Authorize**.

The **Authorization** screen displays.

Figure 3-7 Authorization



4. Click **View** to view the record.

 **Note:**

If the **Enforce View before Authorize** toggle is enabled in **External Bank Parameter Maintenance** screen, the user must view the record before approving or rejecting.

5. Click **Cancel** to cancel the authorization of the record.

6. Select the required modification number that must be approved/rejected.

 **Note:**

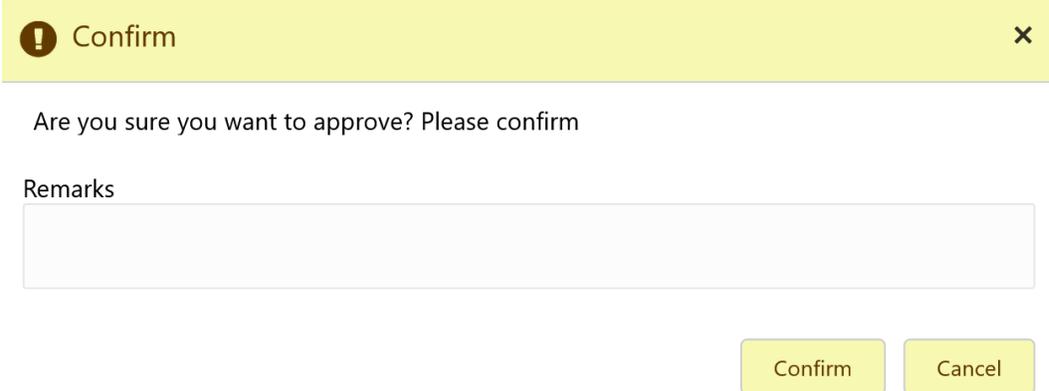
- If the lower modification has to be rejected, all the higher modifications (if any) must also be rejected.
- If the higher modification has to be approved, all the lower modifications (if any) must also be approved.

To approve the record:

7. Click **Approve** to approve the record.

The **Approval Confirmation** popup screen displays.

Figure 3-8 Approval Confirmation



! Confirm X

Are you sure you want to approve? Please confirm

Remarks

Confirm Cancel

8. Specify the approval remarks in the **Remarks** field.

9. Click **Confirm** to approve the record.

The selected record is approved and the approval remarks can be viewed in **Audit** screen. Refer [Audit the Records](#) topic for the detailed explanation.

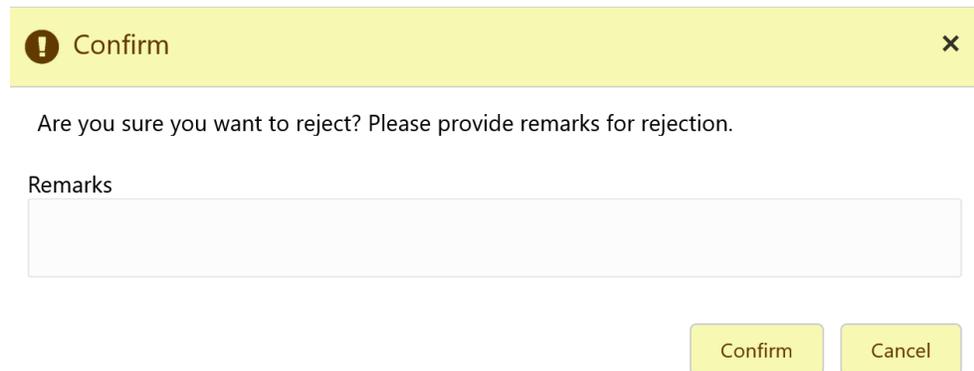
10. Click **Cancel** to discard the approval.

To reject the record:

11. Click **Reject** to reject the record.

The **Rejection Confirmation** popup screen displays.

Figure 3-9 Rejection Confirmation



The screenshot shows a yellow dialog box titled 'Confirm' with a close button (X) in the top right corner. Below the title bar, the text reads: 'Are you sure you want to reject? Please provide remarks for rejection.' Underneath this text is a text input field labeled 'Remarks'. At the bottom right of the dialog box, there are two buttons: 'Confirm' and 'Cancel'.

12. Specify the rejection remarks in the **Remarks** field.

 **Note:**
The **Remarks** is mandatory while rejecting the record.

13. Click **Confirm** to reject the record.
The selected record is rejected and the rejection remarks can be viewed in **Audit** screen. Refer [Audit the Records](#) topic for the detailed explanation.
14. Click **Cancel** to discard the rejection.

3.12 Minimize and Maximize the Records

This topic describes the systematic instruction to minimize and maximize the records.

1. Navigate to **Summary** screen.
2. Click **Collapse** to minimize the screen.
The minimized screen displays at the bottom left corner of the screen.
3. Click **Maximize** button to maximize the screen.
The screen is maximized.

3.13 Close the Records

This topic describes the systematic instruction to close the record.

1. Navigate to **Summary** screen.
2. Click **Remove** button to close the record.
The selected record is closed.

 **Note:**

If the user is in the middle of creating/modifying the records, an error/warning message appears prompting to save the changes.

3.14 Audit the Records

This topic describes the systematic instruction to audit the record.

1. Navigate to **Summary** screen.
2. Click  icon and click **Unlock** or **View** button to modify/view the record.
3. On **Maintenance** screen, click **Audit** to view the change history of the record.

The **Audit** detail popup screen displays.

Figure 3-10 Audit

Maker	Checker
 SHRADDHAC01	
 04/22/2022, 3:54:16 PM	
Status	Modification No
 Unauthorized	7
 Open	Show History

4. Click **Show History** hyperlink to view the modification history of the record.

 **Note:**

This hyperlink appears only if the **Modification Number** is greater than 1.

The **Modification History** popup screen displays in the reverse chronological order.

Figure 3-11 Modification History

[Back](#)

Modification No: 7 Authorization Status: Unauthorized Record Status: Open	Maker: SHRADDHAC01 Maker Remarks: - 4/22/2022, 3:54:16 PM	Checker: Checker Remarks: -
Modification No: 6 Authorization Status: Authorized Record Status: Closed	Maker: SHRADDHAM01 Maker Remarks: - 4/22/2022, 3:44:16 PM	Checker: SHRADDHAC01 Checker Remarks: - 4/22/2022, 3:44:37 PM
Modification No: 5 Authorization Status: Authorized Record Status: Open	Maker: SHRADDHAC01 Maker Remarks: - 4/3/2022, 3:52:30 PM	Checker: SHRADDHAM01 Checker Remarks: - 4/3/2022, 3:52:47 PM

Page of 3 (1-3 of 7 items) | K < 2 3 > X

5. Click **Back** to navigate to the previous screen.
6. Click anywhere the screen to close the audit detail popup screen.

4

Screen / Dashboard

This topic describes about the various components in Screen / Dashboard.

- [Pagination](#)
This topic describes about the pagination details in the screen.
- [Mandatory and Optional Fields](#)
This topic describes about the mandatory and optional fields in the screen.
- [Configure Tile](#)
This topic describes the systematic instruction to configure the dashboard tile.
- [Remove Tile](#)
This topic describes the systematic instruction to remove the dashboard tile.
- [Reorder Tile](#)
This topic describes the systematic instruction to reorder the dashboard tile.
- [Expand Tile](#)
This topic describes the systematic instruction to expand the dashboard tile.
- [Add Tile](#)
This topic describes the systematic instruction to add the dashboard tile.

4.1 Pagination

This topic describes about the pagination details in the screen.

The pagination displays the number of records on the bottom left corner of the selected view screen. The number of pages appears depending on the records available. The user can navigate to the first page, last page, previous page, or next page using the numbers options.

4.2 Mandatory and Optional Fields

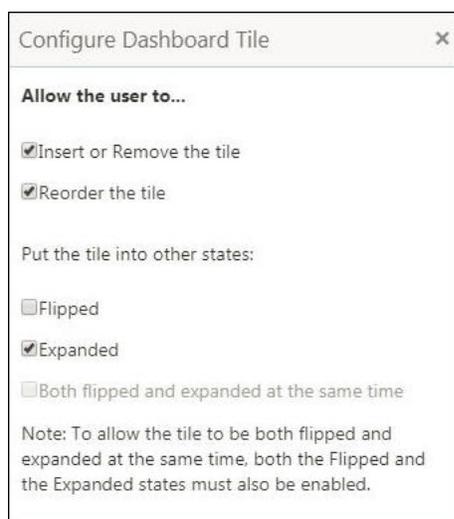
This topic describes about the mandatory and optional fields in the screen.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the asterisk (*) symbol. If the user tries to save the record without providing all the mandatory fields, a red exclamation mark or an error appears against the field to update the details.

4.3 Configure Tile

This topic describes the systematic instruction to configure the dashboard tile.

1. On the **Dashboard** screen, click **Configure Tile**.
The **Configure Dashboard Tile** pop-up screen displays.

Figure 4-1 Configure Dashboard Tile


- On **Configure Dashboard Tile** screen, select the required options. For more information on fields, refer to the field description table.

Table 4-1 Configure Dashboard Tile

Field	Description
Insert or Remove the tile	If selected, the user can remove the dashboard widget from the dashboard-landing page.
Reorder the tile	If selected, the user can rearrange the dashboard widget in the dashboard-landing page.
Flipped	If selected, the user can flip the dashboard widget for more information.
Expanded	If selected, the user can expand the dashboard widget in the dashboard landing page.
Both flipped and expanded at the same time	If selected, the user can flip and expand the dashboard widget in the dashboard landing page.

- Click **Close** button to update the dashboard widget configuration.

4.4 Remove Tile

This topic describes the systematic instruction to remove the dashboard tile.

- On the **Dashboard** screen, click **Remove** to remove the dashboard widget from the landing page.
The removed widgets are available under the **Add Tiles** option.

4.5 Reorder Tile

This topic describes the systematic instruction to reorder the dashboard tile.

- Select and drag the **Drag to Reorder** to drop the dashboard widget at the desired place. The page is automatically refreshed and displays the updated order.

4.6 Expand Tile

This topic describes the systematic instruction to expand the dashboard tile.

- On the **Dashboard** screen, click **Expand Tile** to view all the information of the dashboard widget. The expanded widget appears on a complete row to view more information.

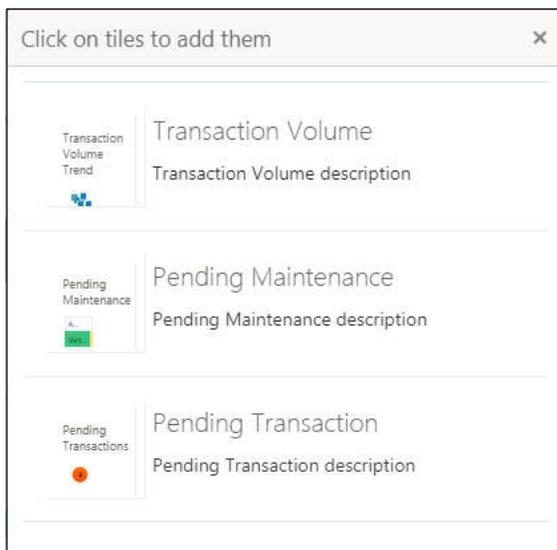
4.7 Add Tile

This topic describes the systematic instruction to add the dashboard tile.

1. Click **Add Tiles to Dashboard** to add more available dashboard widget to the dashboard landing page.

The **Click on tiles to add them** screen displays.

Figure 4-2 Click on tiles to add them



2. Click on the dashboard that the user wants to add to the dashboard-landing page. The page is automatically refreshed and displays the added dashboard widget.

5

Common Fields

This topic provides the information about all the common fields used in the application.

The list of common fields are described as follows.

Table 5-1 Common Fields

Field	Description
Branch Code	The user can select a configured branch code which the user wants to associate with the selected screen.
Maker	Displays the name of the logged in user who created the record.
Customer Number	The user can select a configured customer number which the user wants to associate with the selected screen. The user can configure the customer number using the Create External Customer screen.
Account Number	The user can select a configured account number which the user wants to associate with the selected screen. The user can configure the account number using the Create External Customer Account screen.
Source System	The user can select a configured source system which the user wants to associate with the selected screen. The user can configure the source system using the Create Upload Source screen.
Host Code	The user can select a configured host code which the user wants to associate with the selected screen. The user can configure the host code using the Create Host Code screen.
Currency	The user can select a configured currency which the user wants to associate with the selected screen. The user can configure the currency using the Create Currency Definition screen.
Status	Displays the status of the record. <ul style="list-style-type: none">• Authorized: The record is verified and authorized.• Unauthorized: The record is not verified.• Rejected: The record is rejected.• Open: The record is open and waiting for verification.• Locked: The record is locked.• Closed: The record is closed.

6

Common Buttons/Icons

This topic provides the information about all the common buttons/icons used in the application.

The list of common buttons and icons are described as follows.

Table 6-1 List of Buttons/Icons

Button/Icon	Description
New	Creates a new record for the selected screen.
Query	View all the 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.
Copy	Copy the configured record, modify the details, and save with a different name for the record.
Delete	Remove the configured record for the selected screen.
Reopen	Reopens a closed record for the selected screen.
Close	Closes the configured record for the selected screen.
Print	Prints the configured record for the selected screen.
Authorize	Authorizes the configured record for the selected screen.
Reject	Rejects the configured record for the selected screen.
Collapse	Minimises the opened screen to the bottom left corner of the screen.
Remove	Closes the opened screen.
Audit	Check the history of the configured records for the selected screen.
Save	Save the configured record for the selected scree
Cancel	Discard the configured record before saving it.
+	Add a row in the grid to provide the required record for the selected screen.
-	Remove a row in the grid for the selected screen.
>	Select a record and move it to the required selected list grid.
<	Select a record and move it back to the available list grid.
> 	Move all the available list of records to the selected list of grid.
 <	Move back all the selected list of records to the available list of grid.

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