Oracle® Banking Corporate Lending Process Management

Oracle Conductor Process Installation Guide

Release 14.7.4.0.0

G11869-01

ORACLE

Oracle Banking Corporate Lending Process Management Oracle Conductor Process Installation Guide, Release 14.7.4.0.0

G11869-01

Copyright © 2018, 2024, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Purpose iv
Audience iv
Documentation Accessibility iv
Diversity and Inclusion v
Related Resources v
Conventions v
Screenshot Disclaimer v
Acronyms and Abbreviations v
Basic Actions vi
Symbols and Icons vii

1 Deployment of Processes

1.1 OBCLPM Processes 1-1
1.2 Steps to Deploy Conductor Process 1-2

Preface

This topic contains following sub-topics:

- Purpose
- Audience
- Documentation Accessibility
- Diversity and Inclusion
- Related Resources
- Conventions
- Screenshot Disclaimer
- Acronyms and Abbreviations
- Basic Actions
- Symbols and Icons

Purpose

This guide would help you to install the Oracle Banking Corporate Lending Process Management Conductor based process on designated environment. It is assumed that all the prior setup is already done related to Netflix Conductor.

Audience

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

- Relationship Managers (RMs)
- Credit Risk Mangers (CRMs)
- Legal
- Back end operation
- Other loan executive staffs in charge of maintaining the loan accounts in the bank.
- WebLogic admin or ops-web team who are responsible for installing 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

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Diversity and Inclusion

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

Related Resources

For further information on conductor process installation of Oracle Banking Corporate Lending Process Management application, refer to the following manuals.

- *Oracle Banking Corporate Lending Process Management Installation Guide*
- *Oracle Banking Microservices Platform Foundation Installation 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.
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.

Screenshot Disclaimer

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

Acronyms and Abbreviations

The list of the acronyms and abbreviations used in this guide are as follows:

Table 1 Acronyms and Abbreviations

Abbreviation	Description
DSL	Domain Specific Language

Table 1 (Cont.) Acronyms and Abbreviations

Abbreviation	Description
JNDI	Java Naming and Directory Interface
OBCL	Oracle Banking Corporate Lending
OBCLPM	Oracle Banking Corporate Lending Process Management

Basic Actions

Table 2 List of Basic Actions

Action	Description
Approve	Click **Approve** to approve the initiated report. This button is displayed, once the user click **Authorize**.
Audit	Click **Audit** to view the maker details, checker details of the particular record, and record status. This button is displayed only for the records that are already created.
Authorize	Click **Authorize** to authorize the record created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a record. This button is displayed only for the already created records.
Close	Click **Close** to close a record. This action is available only when a record is created.
Confirm	Click **Confirm** to confirm the performed action.
Cancel	Click **Cancel** to cancel the performed action.
Compare	Click **Compare** to view the comparison through the field values of old record and the current record. This button is displayed in the widget, once the user click **Authorize**.
Collapse All	Click **Collapse All** to hide the details in the sections. This button is displayed, once the user click **Compare**.
Expand All	Click **Expand All** to expand and view all the details in the sections. This button is displayed, once the user click **Compare**.
New	Click **New** to add a new record. The system displays a new record to specify the required data. **Note:** The fields which are marked with Required are mandatory.
OK	Click **OK** to confirm the details in the screen.
Save	Click **Save** to save the details entered or selected in the screen.
View	Click **View** to view the report details in a particular modification stage. This button is displayed in the widget, once the user click **Authorize**.
View Difference only	Click **View Difference only** to view a comparison through the field element values of old record and the current record, which has undergone changes. This button is displayed, once the user click **Compare**.

Symbols and Icons

The following symbols and icons are used in the screens.

Table 3 Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record

Table 3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Calender
	Filter
	Copy a record
	Click this icon to add a new row.

Table 3 (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Click this icon to delete an existing row.
	Click to view the created record.
	Click to unlock, delete, authorize or view the created record.

Table 4 Symbols and Icons - Audit Details

Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status

Table 5 Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status

1

Deployment of Processes

This topic contains following sub-topics.

- OBCLPM Processes
  Use conductor processes to deploy in the Oracle Banking Corporate Lending Process Management.
- Steps to Deploy Conductor Process
  Use steps to deply conductor process to deploy common and all workflow specific task definitions.

1.1 OBCLPM Processes

Use conductor processes to deploy in the Oracle Banking Corporate Lending Process Management.

Deploy the following list of conductor processes for Oracle Banking Corporate Lending Process Management (OBCLPM).

In conductor workflows are defined using a JSON based DSL and includes a set of tasks that are processed as part of the workflows. The tasks are either system tasks or simple tasks (also known as worker tasks).These simple/worker tasks are implemented by application(s) and run in a separate environment from Conductor. These tasks talk to Conductor server through RESTclient. In OBCLPM, for every workflow a workflow definition json (For example, LoanAmmendmend.JSON) file and if required its own worker tasks definition json (TaskDefinitions.JSON) file is maintained. In addition,there is a SharedSimpleTaskDefinitions.JSON file having task definitions that are used across different workflows.

Table 1-1 OBCLPM Processes

S.No	OBCLPM Processes	Process Specific Tasks(if any)
1	LOAN ORIGINATION	CLMO_FA_LNORGN_MRTRY
2	FINANCIAL AMENDMENT	CLMO_FA_LNRSTR_AMRTY
3	NON FINANCIAL AMENDMENT	CLMO_FA_LNRSTR_AMRTY
4	LOAN PAYMENT	CLMO_FA_LNPMNT_HRTRY
5	ROLLOVER	CLMO_FA_LNRSTR_AMRTY
6	RATE QUOTATION	CLMO_FA_LNRQTN_DRADN
7	DRAFT PROPOSAL	CLMO_FA_DRFTPR_AGRNR
8	NLP PROCESS	CLMO_FA_NLPPRC_ENRICH_NLPDETAILS,CLMO_FA_NLPPRC_UPDATE_TXNLOGS,CLMO_FA_NLPPRC_INITIATE_CLMO_APPLICATION
9	RATE QUOTATION PROCESS	CLMO_FA_LNRQTN_CONTRACT_REVERSAL,CLMO_FA_LNRQTN_INIT_LNORG
10	ROLLOVER PROCESS	CLMO_FA_ROLVAU_HANDOFF
11	PREMANDATE ARRANGER	CLMO_FA_SNPMND_EXEST

Table 1-1 (Cont.) OBCLPM Processes

S.No	OBCLPM Processes	Process Specific Tasks(if any)
12	PREMANDATE CO ARRANGER	CLMO_FA_SNPMCA_TREXD
13	CONSOLIDATION ROLLOVER	CLMO_FA_SYCNRL_AMRTY
14	ROLLOVER	CLMO_FA_SYSPRL_AMRTY
15	PAYMENT	CLMO_FA_SNPMNT_HRTRY
16	POST MANDATE ARRANGER	CLMO_FA_SNPOAR_RCCPS
17	POST MANDATE AGENT	CLMO_FA_SNPOAG_APCPS
18	PARTICIPANT PROCESS	CLMO_FA_SNPRTP_RCVCS
19	OPERATIONS ENRICHMENT	CLMO_FA_SNOPEN_APCPS
20	AGENCY DRAWDOWN	CLMO_FA_SNAGDS_RHDOF
21	PARTICIPANT DRAWDOWN	CLMO_FA_SNDRWD_HANDOFF
22	DRAWDOWN AMENDMENT	CLMO_FA_SYDAMD_HANDOFF
23	PARTICIPANT TRANSFER	CLMO_FA_SNPATR_HANDOFF
24	RESTRUCTURE	CLMO_FA_LIQDD_HANDOFF
25	BULK PAYMENT	CLMO_FA_BLKPMT_HANDOFF
26	TRANCHE MARGIN AMENMENT	CLMO_FA_SNMRAM_HANDOFF
27	TRANCHE AMENDMENT	CLMO_FA_SNTRAM_HANDOFF
28	TRANCHE NON FIN AMENDMENT	CLMO_FA_TNFAMD_HANDOFF
29	DRAWDOWN	CLMO_FA_LNORGN_MRTRY

Table 1-2 Common TaskDefinitions

S.No	Common TaskDefinitions(Used across different OBCLPM processes)
1.	FA_KYC_CHECKER
2.	FA_CAMS_HANDOFF
3.	FA_LNORGN_HANDOFF
4.	FA_STATUS_UPDATE
5.	FA_RISK_APPROVAL
6.	FA_INITIATE_OPS_ENRICH
7.	FA_BORROWER_ONBOARDING
8.	FA_MILESTONE_CHECK
9.	FA_INITAITE_QE
10.	FA_SNDRWD_HANDOFF

1.2 Steps to Deploy Conductor Process

Use steps to deply conductor process to deploy common and all workflow specific task definitions.

Pre-Requisite

PLATO-O and **PLATO-ORCH-SERVICE** services should be up and registered in the Eureka registry.

For the installation of **PLATO-O** and **PLATO-ORCH-SERVICE**, refer to *Plato Infrastructure Services Installation Guide*.

Post-Requisite

CLMO-ORCHESTRATION-SERVICE should be deployed after registering common task definitions and all workflow specific task definitions (total of 26 task definitions listed above) as this service would have worker implementation for all the simple tasks. Presently this service has 26 worker implementations with 36 threads configured for worker coordinator to manage these workers.

> **Note:**
>
> Steps to deploy a process remains the same for all the process files.

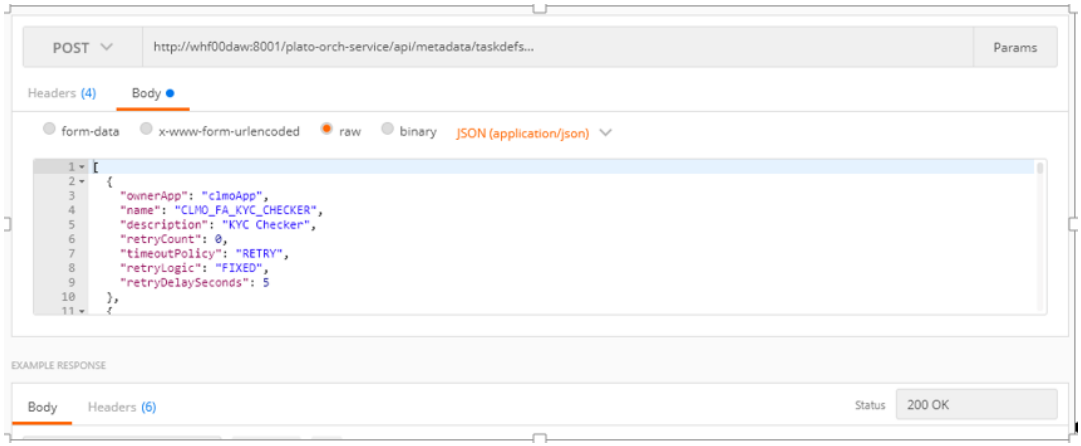
In OBCLPM, for every workflow a workflow definition json (e.g. LoanDraftProposal.JSON) file and if required its own worker tasks definition json (TaskDefinitions.JSON) file will be maintained. Also, there is a SharedSimpleTaskDefinitions.JSON file having simple task definitions that are used across all workflows. To deploy all or any workflow definition.

1. Firstly shared simple tasks definitions should be done. for that below endpoint can be invoked from postman tool with header and payload as described below.

> **Note:**
>
> The host name and port number of the PLATO-ORCH-SERVICE from the eureka registry should be used in this endpoint

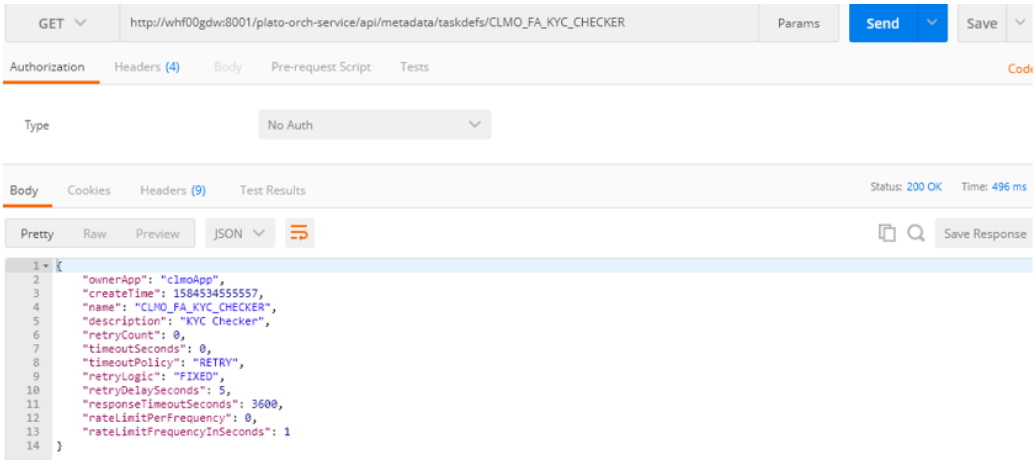
```
Task definitions end point:
http://whf00mdj:9009/plato-orch-service/api/metadata/taskdefs
HTTP Method: POST
Header parameters:
Content-Type:application/json
appId:platoorch
branchCode:004
userId:USER1
Payload:SharedSimpleTaskDefinitions.JSON content
```

Figure 1-1 HTTP Method: POST



2. To verify if any of the task is registered , http://whf00mdj:9009/plato-orch\u0002service/api/metadata/taskdefs/{taskname} endpoint can be invoked with GET HTTP Method as shown below.

Figure 1-2 GET HTTP Method



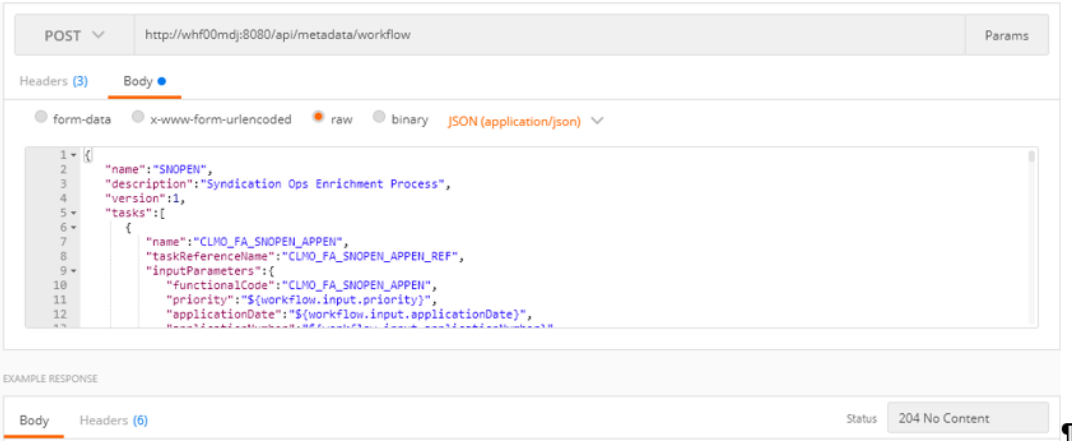
.....

3. Next workflow specific task definitions should be done. for that use the task definition endpoint mentioned at step 1 and provide workflows specific TaskDefinitions.JSON file content as payload.

4. Next workflow definitions should be done. for that use the workflow definition endpoint mentioned below and provide workflows definition json (e.g. LoanDraftProposal.JSON) file content as payload.

```
k definitions end point:
http://whf00mdj:9009/plato-orch-service/api/metadata/workflow
HTTP Method: POST
Header parameters:
Content-Type:application/json
appId:platoorch
branchCode:004
userId:USER1
Payload: LoanDraftProposal.JSON content
```

Figure 1-3 Post HTTP Method



¶

5. To verify if the workflow is registered , http://whf00mdj:9009/plato-orch\u0002service/api/metadata/workflow/DRFTPR?version=1 endpoint can be invoked with GET HTTP Method and check if workflow definitions is available. The workflow name to be used in this GET can be referred from name property workflow definition json. Similarly, all the workflow definitions can be registered and verified one by one.

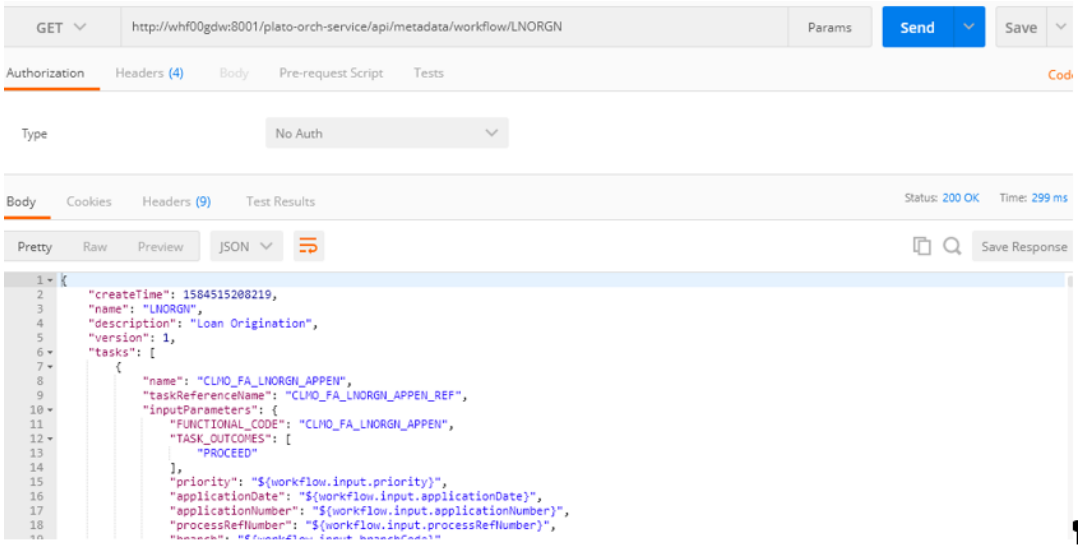



Figure 1-4 Get HTTP Method