Oracle® Banking Corporate Lending Process Management
Initial Setup Guide

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Oracle Banking Corporate Lending Process Management Initial Setup Guide, Release 14.8.0.0.0

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Preface

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Purpose

This guide would help you to setting up initial configuration for Oracle Banking Corporate Lending Process Management application. This document steps have to be completed for Oracle Banking Corporate Lending Process Management application to run.

Audience

This document is intended for the following Users/User Roles:

Table 1   Audience

Roles	Functions
WebLogic admin or Ops-web team	Who install the Oracle Financial Services Software Limited (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.

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 make sure 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

For further information on initial configuration for Oracle Banking Corporate Lending Process Management application, refer to the following manuals.

- *Common Core Services Installation Guide*
- *Oracle Banking Corporate Lending Process Management Pre-Installation Guide*
- *Oracle Banking Corporate Lending Process Management Installation Guide*
- *Oracle Banking Microservices Platform Foundation Installation Guide*
- *Security Management System Services Installation Guide*
- *SSL Setup Guide*
- *Configuration and Deployment Guide*

Conventions

The following text conventions are used in this document:

Table 2   Conventions

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.

Table 2   (Cont.) Conventions

Convention	Meaning
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 3   Acronyms and Abbreviations

Abbreviation	Description
LDAP	Lightweight Directory Access Protocol

Basic Actions

Table 4   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**.

Table 4   (Cont.) List of Basic Actions

Action	Description
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 5   Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list

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Table 5   (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
+	Add a new record
|<	Navigate to the first record
>|	Navigate to the last record
◀	Navigate to the previous record
▶	Navigate to the next record
⊞	Grid view
☰	List view
↻	Refresh
🗓	Calender

Table 5   (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Filter
	Copy a record
	Click this icon to add a new row.
	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 6   Symbols and Icons - Audit Details

Symbol/Icon	Function
	A user
	Date and time

Table 6   (Cont.) Symbols and Icons - Audit Details

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

Table 7   Symbols and Icons - Widget

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

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Security Management System Initial Setup

Use this topic to setting up initial configuration of Security Management System (SMS).

After completing this you would be creating two users with default role. It is recommended to delete created user during this process and create your own user using valid role.

Prerequisites

Ensure to complete SMS Core service installation before you start SMS initial setup.

SMS Initial Setup

Collect INC mentioned in From-Path section in the below table and compile to respective schema. During compile it will prompt a window asking UserId followed by UserName , enter UserId and UserName.

> ✎ **Note:**
>
> Ensure provided user present in LDAP server.

Table 1-1   SMS Initial Setup

Script Name	From-Path	Compile To	Purpose
sms_initial_set up.sql	{Unzip OSDC}/ OBCLPM_14.x.0.0.0/ OBCLPM_INITIAL_ SETUP	SMS Schema	To create SMS roles and default users.
obclpm_initial_ setup.sql	{Unzip OSDC}/ OBCLPM_14.x.0.0.0/ OBCLPM_INITIAL_ SETUP	SMS Schema	To create default roles for loans.

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Common Core Initial Setup

Use this topic to setup the initial configuration for Common Core.

After completing this you would be creating one Branch called '000', one Bank called 0000, System date '13-APR-18'. It is recommended to delete created data during this process and create your own user using valid data

Prerequisite

Ensure to complete Common Core service installation before you start Common Core initial setup.

Common Core Initial setup

Collect INC mentioned in From-Path section in the below table and compile to respective schema.

Table 2-1   Common Core Initial setup

Script Name	From-Path	Compile To
cmc_initial_set up.sql	{Unzip OSDC}/ OBCLPM_14.x.0.0.0/ OBCLPM_INITIAL_ SETUP	Common Core Schema

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