# Oracle® Banking Origination

# Alerts and Dashboards User Guide (US Regionalization)

Release 14.8.0.0.0

G28915-01

April 2025

ORACLE®

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# Preface

## Purpose

Welcome to the **Alerts and Dashboard** user guide for Oracle Banking Origination. This document provides an overview on the **Dashboard** widgets and **Alerts** available in Oracle Banking Origination and guides you through the various features in dashboards and notifications can are available respectively. This document helps you conveniently make use of dashboards.

## Audience

The user guide is intended for the Relationship Managers (RMs) and Sales Officers in-charge of sourcing the bank products from prospect and customer of the bank. The user guide is also intended for the other bank personas such as Account Opening Officer, Account Opening Supervisor, Loan Officer and Credit Manager handling the specific stages of the Savings Account, Current Account and Loan lifecycle.

## 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.

# 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 ensure 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.

# Acronyms and Abbreviations

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

**Table 1    Acronyms table**

| Abbreviation | Description |
|---|---|
| DS | Data Segment |
| System | Oracle Banking Origination Module |
| OBA | Oracle Banking Accounts |
| OBO | Oracle Banking Origination |

# 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. |

# Symbol and Icons

**Table 2    Symbols and Icons - Common**

| Symbol/Icon | Function |
|---|---|
| | Minimize |
| | Maximize |
| | Close |
| | Perform Search |
| | Open a list |
| | Add a new record |
| | Navigate to the previous record |
| | Navigate to the next record |
| | Refresh |
| | Calendar |
| | Alerts |

# 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.

# 1

# Dashboards

This topic provides the information about the Dasboards available in Oracle Banking Origination

Oracle Banking Origination is the middle office banking solution with a comprehensive coverage of Retail Banking Origination processes for Savings Account, Current Account, Term Deposit, Credit Card, and Loans comprising of Home Loan, Personal Loan, Education Loan, and Vehicle Loan. It is a Host-Agnostic solution.

It enables banks to deliver improved user experience for various Bank persons such as Sales Officers, Relationship Manager, Account Opening Officers, Branch Supervisor/Managers, Loan Officers, and Credit Officers and so on; handling defined functions in the life-cycle of the various product origination.

Oracle Banking Origination supports the various dashboards to aid in enhancing the productivity and operational efficiency by providing a quick insight into various pertinent areas. The idea of these Dashboards is to ease the trouble of looking for data or statistics in the system.

Each dashboard has a unique **Functional Activity Codes**. The access of the dashboard is provided to the individual user either by assigning the specific functional activity code to the role that they belong to or can also be provided by assigning the dashboard functional activity code directly to their User ID.

> ✎ **Note:**
>
> Refer to the **Configuration User Guide** for more details.

By default, all the dashboard that has been assigned for the User or User Role are displayed in the dashboard. The user can define their personal dashboard preferences by:

1. Removing any dashboard tile that they do not want to see by clicking on **x** icon available on the top right side of the dashboard tile or widget.

2. They can add a dashboard tile by clicking on the **+** icon on the top right side of the dashboard screen named **Add Tile to the Dashboard**. System displays all the dashboards that are allowed for the user to select.

3. They can move the dashboard tile to their preferred position in the dashboard screen through drag and drop.

4. Certain dashboard tiles can be expanded or minimized, for which User has to click on the

    icon available in the bottom right side panel of the dashboard tile.

This topic contains the following subtopics:

* My Applications
  This topic describes systematic instructions to view My Applications dashboard.

- Application Search
  This topic describes systematic instructions to view Application Search dashboard.

- Conversion Analysis
  This topic describes systematic instructions to view Conversion Analysis dashboard.

- Account Opening Trends
  This topic describes about the various account opening trends in Oracle Banking Origination.

- Stage Wise Loan Details
  This topic describes systematic instructions to display Stage Wise Loan Details dashboard.

- Loan Offer Status
  This topic describes systematic instructions to view Loan Offer Status dashboard.

- Loan Exposure to Collateral
  This topic describes systematic instructions to view Loan Exposure to Collateral dashboard.

- Product Application Near Expiration
  This topic describes systematic instructions to view Product Application Near Expiry dashboard.

- Loan Offers Near Expiration
  This topic describes systematic instructions to view Loan Offers Near Expiry dashboard.

- SLA Status Summary
  This topic describes systematic instructions to view SLA Status Summary dashboard.

# 1.1 My Applications

This topic describes systematic instructions to view My Applications dashboard.

A bank user who is logged in, including roles such as Relationship Manager, Sales Manager, or Loan Officer, has the ability to access the details of applications they have initiated through the **Application** dashboard.

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

1. On **Home** screen, click **Dashboard**.

   The **Applications** dashboard displays in **Dashboard** screen.

**Figure 1-1    My Application**



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

**Table 1-1    My Applications – Field Description**

| Field | Description |
|-------|-------------|
| **Customer Onboarding** | The application displays the total number of new customer onboarding requests initiated. |
| **Savings Account** | The application displays the total number of Savings Account requests initiated. |
| **Loans** | The application displays the total number of loan requests initiated. |
| **Checking Account** | The application displays the total number of Checking Account requests initiated. |
| **Certificate of Deposits** | The application displays the total number of Certificate of Deposits requests initiated. |
| **Credit Cards** | The application displays the total number of Credit Card requests initiated. |

The donut view presents the overall count of applications started by the user, organized according to the priority assigned to each application at the time of initiation.

The available priorities are:

* **High**
* **Medium**
* **Low**

2.   Hover on the donut split for the specific priority and click it.

The right side screen displays the number for the specified selected priority, with applications split into various age buckets as described below.

- **Less than 5 Days**

- **5-10 Days**

- **10-20 Days**

- **21 Days and Above**

User can drill down and view the application list by clicking the hyperlinks on the displayed numbers.

3. Click on hyperlinked number.

   The **All Applications** screen displays.

**Figure 1-2    Applications Drill-Down**



The **All Applications** screen displays the list of various applications.

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

**Table 1-2    All Applications – Field Description**

| Field | Description |
| --- | --- |
| Application Reference Number | Displays the application reference number. |
| Application Date | Displays the application date. |
| Customer Name | Displays the customer name. |
| CIF | Displays the CIF. |
| Mobile Number | Displays the mobile number. |
| Email | Displays the e-mail ID. |
| Application Process | Displays the icons representing the Product or Application process. |

The user can further search a specific application by entering one of the following:

- **Application Number**

- **CIF**

- **Customer Name**

- **Mobile Number**

- **Email ID**

4. Click on an application row to view more details about the application.

   The **Application Details Drill-Down** screen displays.

**Figure 1-3    Application Details Drill-Down**



The **Application Information** screen displays separate cards for various products initiated as part of the application.

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

**Table 1-3    Application Information – Field Description**

| Field | Description |
|---|---|
| **Application Date** | Displays the application date. |
| **Phone** | Displays the phone number. |
| **Email** | Displays the e-mail ID. |
| **Source By** | Displays the username who has sourced the application. |
| **Channel** | Displays the channel name. |

**Table 1-3    (Cont.) Application Information – Field Description**

| Field | Description |
|---|---|
| Priority | Displays the priority of the application.<br>• **High**<br>• **Medium**<br>• **Low** |
| Product Name | Displays the product name of the application. |
| Stage Bar | Indicates the current stage of the application. |
| Account Number | Displays the HOST account number.<br>**Note:** The application is displayed once all stages are completed and the account is created in Host. |
| Total time spent | Displays the time spent for the product process since initiation of the application. |
| User ID Assigned | Displays the **User ID** of the user currently working on the product process.<br>**NOTE:** This is blank in case the product process task is not acquired by any user. |
| Time spent | Displays the days spent in the current phase/stage. |
| Current Stage | Displays the stage in which the product process is currently in.<br>**NOTE:** If the phase is configured for the product, the current stage is displayed as current phase. |
| Stage Start Date | Displays the stage in which the product process is currently in.<br>**NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date. |
| Account Opening Date | Displays the account opening date. |
| Expected Account Opening Date | Displays the expected account opening date. |
| Actions Tab | <br><br>Displays the information on the features considered to predict the expected account opening date. |
| More Info | Click **More Info** hyperlink to view more details about the customer clarification raised. |
| Application Number | Displays the application number. |

**5.** Click  icon to launch the Data Points pop-up screen.

The **Data Points** pop-up displays.

**Figure 1-4    Data Points**



**6.** Click on **More Info** hyperlink.

The **More Info** pop-up displays.

**Figure 1-5    More Info**



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

**Table 1-4    Clarification Details – Field Description**

| Field | Description |
| --- | --- |
| **Clarification** | Displays the subject of the requested clarification. |
| **Raised By** | Displays the user id of the user who raised the clarification request. |
| **Clarification Date** | Displays the clarification date on which the request was raised. |
| **Response Type** | Displays the response type. |
| **Clarification Status** | Displays the status of clarification.<br>The available options are:<br>• **Clarification Requested**<br>• **Clarification Withdrawn**<br>• **Clarification Completed** |
| **Status Update Date** | Displays the date on which status was updated. |
| **New Clarification** | Click **New Clarification** to raise a new clarification request. |

**7.** Select any specific clarification request row.

The **Clarification Details** for the selected clarification request displays.
The **Clarification Details** screen displays details about the specific customer clarification request raised.

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

**Table 1-5    Clarification Details – Field Description**

| Field | Description |
|---|---|
| Clarification ID | Displays the unique clarification ID. |
| Clarification Subject | Displays the subject of clarification request. |
| Raised By | Displays the user id of the user who has raised the clarification request. |
| Clarification Date | Displays the clarification date. |
| Status | Displays the status of clarification. |
| Status Update Date | Displays the date on which status was updated. |
| New Conversation | Click **New Conversation** to raise conversation for the selected clarification request.<br>User can access and modify the conversation through the **My Applications** and **Application Search** dashboard by selecting the **More Info** hyperlink located on the Product card.If any user other than the one who originally submitted the clarification request updates the new conversation, a bell notification will be dispatched to the individual who made the request.<br>The available options are:<br>• **Save and Close**: Click **Save and Close** to save the conversation.<br>• **Cancel**: Click **Cancel** to cancel the conversation update. |
| Withdraw Clarification | To withdraw and finalize the selected clarification request, please click on **Withdraw Clarification**. It is essential to update the clarification details before proceeding with the withdrawal. Users have the ability to modify the reason for withdrawing the clarification and may also upload any necessary documents.<br>The available options are:<br>• **Save and Close**: Click **Save and Close** to withdraw the clarification.<br>• **Cancel**: Click **Cancel** to withdraw the clarification action.<br>**Note** : Remove the Clarification display if the request for clarification was submitted by the same user. For others, **New Conversation** is available, which can be used to update conversations on the specified Clarification ID. |
| Accept Clarification | To finalize the raised clarification, please click on **Accept Clarification**. It is essential to update the clarification details before proceeding with the acceptance. Users have the ability to modify the reasons for accepting the clarification and may also upload any necessary documents.Upon acceptance of the clarification request, no additional discussions may occur regarding the Clarification ID. Furthermore, the application status will be updated to **My Task**.<br>The available options are:<br>• **Save and Close**: Click **Save and Close** to accept the clarification.<br>• **Cancel**: Click **Cancel** to cancel the withdrawal clarification action.<br>**Note**:The **Accept Clarification** indicates whether the Clarification request originated from the same user. For some users, only the **New Conversation** option is accessible, allowing them to update conversations associated with the designated Clarification ID. |

> **✎ Note:**
>
> - System sends an e-mail notification to the customer for clarification requests raised for an application.
> - Additionally, Bell Notification is sent to the user who had raised the request, whenever a conversation is raised for the **Clarification Request**.

# 1.2 Application Search

This topic describes systematic instructions to view Application Search dashboard.

The **Application Search** dashboard allows the user to enquire an application through the various search criteria based on the following:

- **Application Number**
- **Customer Name**
- **CIF**
- **Mobile Number**
- **E-mail ID**
- **Unique ID**
- **SSN**

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

1. On **Home** screen, click **Dashboard**.

   The **Application Search** dashboard displays in **Dashboard** screen.

   **Figure 1-6    Application Search**

   

2. Click **Search** icon.

   It allows to view the application list and allows further drill-down to view the application details.
   Please refer **My Application** to know more about the **All Applications Drill-Down** screen and **Application Details Drill-Down** screen.

# 1.3 Conversion Analysis

This topic describes systematic instructions to view Conversion Analysis dashboard.

The **Conversion Analysis** dashboard allows the logged-in bank user to view the details of the conversion for the various products originated by them.

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

1. On **Home** screen, click **Dashboard**.

   The **Conversion Analysis** dashboard displays in **Dashboard** screen.

   **Figure 1-7    Conversion Analysis**

   

2. Click

   

   icon to filter the data.

   The available options are:

   • **Products**

   • **Period**

   By default, the system displays the month-wise conversion details of all the products originated for the current month. This dashboard provides bifurcations across **Work-In-Progress (WIP)**, **Completed**, and **Rejected** for the products originated.

3. Click on hyper-linked number.

   The **All Applications** screen displays.

**Figure 1-8    All Applications Drill-Down**



The **All Applications** screen displays the list of various applications for the selected Conversion Status

The All Applications Drill-Down screen displays the list of various applications for the selected Conversion Status. Refer **My Application** , to read more about the All Applications Drill-Down screen and Application Details Drill-Down screen.

# 1.4 Account Opening Trends

This topic describes about the various account opening trends in Oracle Banking Origination.

This topic contains the following subtopics:

- New Savings Account
  This topic describes systematic instructions to view New Savings Account dashboard.

- New Current Account
  This topic describes systematic instructions to view New Current Account dashboard.

- New Loan Account
  This topic describes systematic instructions to view New Loan Account dashboard.

- New Term Deposits
  This topic describes systematic instructions to view New Term Deposit dashboard.

- New Credit Cards
  This topic describes systematic instructions to view New Credit Cards dashboard.

## 1.4.1 New Savings Account

This topic describes systematic instructions to view New Savings Account dashboard.

The **New Savings Account** dashboard allows the logged-in bank user to view the trend of the savings account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Savings Account** dashboard displays in **Dashboard** screen.

**Figure 1-9    New Savings Account**



2.  Click **Filter** icon to filter the data.

    The available options are:

    •   **Currency**

    •   **Period**

    By default, the system displays month-wise trend of the savings account opened.

3.  Click  icon to change the chart type.

4.  Click  icon to expand the dashboard.

## 1.4.2 New Current Account

This topic describes systematic instructions to view New Current Account dashboard.

The **New Current Account** dashboard allows the logged-in bank user to view the trend of the current account opened for the specified period.

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

1.  On **Home** screen, click **Dashboard**.

    The **New Current Account** dashboard displays in **Dashboard** screen.

**Figure 1-10    New Current Account**



2. Click **Filter** icon to filter the data.

   The available options are:

   • **Currency**

   • **Period**

   By default, the system displays month-wise trend of the current account opened.

3. Click  icon to change the chart type.

4. Click  icon to expand the dashboard.

## 1.4.3 New Loan Account

This topic describes systematic instructions to view New Loan Account dashboard.

The **New Loan Account** dashboard allows the logged-in bank user to view the trend of the loan account opened for the specified period.

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

1. On **Home** screen, click **Dashboard**.

   The **New Loan Account** dashboard displays in **Dashboard** screen.

**Figure 1-11    New Loan Account**



2.  Click **Filter** icon to filter the data.

    The available options are:

    •   **Currency**

    •   **Period**

    By default, the system displays month-wise trend of the loan account opened.

3.  Click            icon to change the chart type.

4.  Click            icon to expand the dashboard.

## 1.4.4 New Term Deposits

This topic describes systematic instructions to view New Term Deposit dashboard.

The **New Term Deposits** dashboard allows the logged-in bank user to view the trend of the term deposit account opened for the specified period.

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

1.  On **Home** screen, click **Dashboard**.

    The **New Term Deposits** dashboard displays in **Dashboard** screen.

**Figure 1-12    New Term Deposits**



2.   Click **Filter** icon to filter the data.

The available options are:

•   **Currency**

•   **Period**

By default, the system displays month-wise trend of the term deposit account opened.

3.   Click  icon to change the chart type.

4.   Click  icon to expand the dashboard.

## 1.4.5 New Credit Cards

This topic describes systematic instructions to view New Credit Cards dashboard.

The **New Credit Cards** dashboard allows the logged-in bank user to view the trend of the credit card account opened for the specified period.

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

1.   On **Home** screen, click **Dashboard**.

The **New Credit Cards** dashboard displays in **Dashboard** screen.

**Figure 1-13    New Credit Cards**



**2.** Click **Filter** icon to filter the data.

The available options are:

- **Currency**

- **Period**

By default, the system displays month-wise trend of the credit card account opened.

**3.** Click  icon to change the chart type.

**4.** Click  icon to expand the dashboard.

# 1.5 Stage Wise Loan Details

This topic describes systematic instructions to display Stage Wise Loan Details dashboard.

The **Stage Wise Loan Details** dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the stage-wise details of the loans for their branch.

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

**1.** On **Home** screen, click **Dashboard**.

The **Stage Wise Loan Details** dashboard displays on **Dashboard** screen.

**Figure 1-14    Stage Wise Loan Details**



**2.** Click **Filter** icon to filter the data.

The available options are:

- **Currency**

- **Branch**

- **Sub-Products**

- **Period**

- **Select Month**

By default, the system displays the stage-wise details of the loans of the logged-in user for the current month.

# 1.6 Loan Offer Status

This topic describes systematic instructions to view Loan Offer Status dashboard.

The **Loan Offer Status** dashboard allows the logged-in bank user, who could be a Loan Officer or a Loan Head, to view the status of the loans for which offers have been made for their branch.

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

1. On **Home** screen, click **Dashboard**.

   The **Loan Offer Status** dashboard displays in **Dashboard** screen.

   **Figure 1-15    Loan Offer**



In a doughnut chart, the dashboard reveals the numbers and the value of the loan offers for the below mentioned status:

- **Pending for Acceptance**

- **Customer Accepted**

- **Customer Reject**

- **Bank Reject**

2. Click

icon to filter the data.

The available options are:

- **Currency**

- **Period**

By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

3. Click on hyper-linked number.

The **All Applications** screen displays.

**Figure 1-16    All Applications**



The **All Applications** screen displays the list of various Loan applications.

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

**Table 1-6    All Applications – Field Description**

| Field | Description |
|---|---|
| Application Reference Number | Displays the application reference number. |
| Application Date | Displays the application date. |
| Product Type | Displays the sub-product type. |
| Business Product Name | Displays the product name. |
| Customer Name | Displays the customer name. |
| CIF | Displays the CIF. |
| Status | Displays the status of the application. |
| Offer Issue Date | Displays the offer issue date. |
| Mobile | Displays the mobile number. |
| Email | Displays the Email ID. |

The user can further search a specific application by entering one of the following:

- **Application Number**

- **CIF**
- **Customer Name**
- **Mobile Number**
- **Email ID**

4. Click the specific application row to view more details about the application.

The **Application Information** screen displays.

**Figure 1-17    Application Details Drill-Down**



The **Application Information** screen displays separate cards for various products initiated as part of the application.

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

**Table 1-7    Application Information – Field Description**

| Field | Description |
|---|---|
| **Application Number** | Displays the application number. |
| **Application Date** | Displays the application date. |
| **Phone** | Displays the phone number. |
| **E-mail** | Displays the E-mail ID. |

**Table 1-7    (Cont.) Application Information – Field Description**

| Field | Description |
|---|---|
| Source By | Displays the username who has sourced the application. |
| Channel | Displays the channel name. |
| Priority | Displays the priority of the application.<br>• **High**<br>• **Medium**<br>• **Low** |
| Product Name | Displays the product name of the application. |
| Stage Bar | Indicates the current stage of the application. |
| Account Number | Displays the HOST account number.<br>**NOTE:** This field displays once all the stages are completed for the application and the account is created in Host. |
| Total time spent | Displays the time spent for the product process since initiation of the application. |
| User ID Assigned | Displays the **User ID** of the user currently working on the product process.<br>**NOTE:** This is blank in case the product process task is not acquired by any user. |
| Time spent | Displays the days spent in the current phase/stage. |
| Current Stage | Displays the stage in which the product process is currently in.<br>**NOTE:** If the phase is configured for the product, the current stage is displayed as current phase. |
| Stage Start Date | Displays the stage in which the product process is currently in.<br>**NOTE:** If the phase is configured for the product, the stage start date is displayed as phase start date. |
| Account Opening Date | Displays the account opening date. |
| Expected Account Opening Date | Displays the expected account opening date. |
| **Figure 1-18    More Info**<br> | Displays the information on the features considered to predict the expected account opening date. |
| More Info | Click **More Info** hyperlink to view more details about the customer clarification raised. |

# 1.7 Loan Exposure to Collateral

This topic describes systematic instructions to view Loan Exposure to Collateral dashboard.

The **Loan Exposure to Collateral** dashboard allows the logged-in bank user who could be a Lending Head to view the collateral available against the Loans Exposures for their Branch.

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

1. On **Home** screen, click **Dashboard**.

The **Loan Exposure to Collateral** dashboard displays in **Dashboard** screen.

**Figure 1-19    Loan Exposure to Collateral**



This dashboard displays the **Loan Exposure Value** against the **Collateral Value**.

2. Click **Filter** icon to filter the data.

   The available options are:

   • **Currency**

   • **Sub-Products**

   • **Period**

   By default, the system displays the status for the current month, logged-in branch and the base currency of the branch.

# 1.8 Product Application Near Expiration

This topic describes systematic instructions to view Product Application Near Expiry dashboard.

The **Product Application Near Expiry** dashboard allows the logged-in bank user to view the details of applications which are nearing to expiry date.

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

1. On **Home** screen, click **Dashboard**.

   The **Product Application Near Expiry** dashboard displays in **Dashboard** screen.

**Figure 1-20    Product Application Near Expiry**



2.  Click

    

    icon to filter the data.

    The available options are:

    *   **Currency**
    *   **Branch**
    *   **Users**
    *   **Products**
    *   **Sub-Products**

    By default, the system displays the details of all the products, the base currency and the branch of the logged-in user.

3.  Click on hyper-linked number.

    The **All Applications** screen displays.
    The **All Applications** screen displays the list of various applications.

**Figure 1-21    All Applications**



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

**Table 1-8    All Applications – Field Description**

| Field | Description |
|---|---|
| Application Reference Number. | Displays the application reference number. |
| Application Date | Displays the application date. |
| Product Type | Displays the sub-product type. |
| Product Name | Displays the product name. |
| Customer Name | Displays the customer name. |
| CIF | Displays the CIF. |
| Status | Displays the status of the application. |
| App. Expiry Date | Displays the application expiry date. |
| Days to Expire | Displays the total days to expire. |
| Mobile | Displays the mobile number. |
| Email | Displays the Email ID. |

The user can further search a specific application by entering one of the following:

- **Application Number**
- **CIF**
- **Customer Name**
- **Mobile Number**
- **Email ID**

# 1.9 Loan Offers Near Expiration

This topic describes systematic instructions to view Loan Offers Near Expiry dashboard.

The **Loan Offers Near Expiry** dashboard allows the logged-in bank user, such as Relationship Manager, Loan Officer or Loan Head, to view the details of loan offers which are nearing to expiry date.

1. On **Home** screen, click **Dashboard**.

The **Loan Offers Near Expiry** dashboard displays in **Dashboard** screen.

**Figure 1-22    Loan Offers Near Expiry**



2. Click



icon to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Users**
- **Sub-Products**

By default, the system displays the details of all the loan offers for the logged-in user and their team, and the base currency of the branch.

3. Click on the count of applications in bucket list.

The **All Applications** screen displays.

**Figure 1-23    Loan Offers Near Expiry Drill-Down**



The **All Applications** screen displays the list of various loan offers for the selected Loan offer status.

**Table 1-9    All Applications – Field Description**

| Field | Description |
| --- | --- |
| **Application Reference Number** | Displays the application reference number. |
| **Application Date** | Displays the application date. |
| **Product Sub-Type** | Displays the product sub-type. |
| **Product Name** | Displays the product name. |
| **Customer Name** | Displays the customer name. |
| **CIF** | Displays the CIF. |
| **Status** | Displays the status of the application. |
| **Offer Issue Date** | Displays the offer issue date. |
| **App. Expiry Date** | Displays the application expiry date |
| **Days to Expire** | Displays the total days to expire. |
| **Mobile** | Displays the mobile number. |
| **E-mail** | Displays the E-mail ID. |

The user can further search a specific application by entering one of the following:

* **Application Number**
* **CIF**
* **Customer Name**
* **Mobile Number**
* **E-mail ID**

# 1.10 SLA Status Summary

This topic describes systematic instructions to view SLA Status Summary dashboard.

The SLA status widget is available in the Dashboard and is accessible as per user credentials. The Widget displays the SLA status maintained at the process level. The Widget displays only those tasks that are not being handed off to the Back Office system.

Click the right arrow on the widget to view the SLA widget in graphical chart (doughnut chart) as well as in tabular form.

The SLA Status Widget highlights the tasks that are **Within SLA** (in green), **Nearing SLA breach** (in amber) and **breached SLA** (in red)

The **SLA Status Summary** dashboard allows the logged-in bank user to view the details of the SLA Status for the various products originated by them.

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

1. On **Home** screen, click **Dashboard**.

   The **SLA Status Summary - Graphical View** dashboard displays in **Dashboard** screen.

   **Figure 1-24    SLA Status Summary - Graphical View**



2. Click ⟩ icon to view the SLA status summary in Tabular view.

   The **SLA Status Summary - Tabular view** dashboard displays in **Dashboard** screen.

   **Figure 1-25    SLA Status Summary - Tabular View**



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

**Table 1-10    SLA Status Summary – Field Description**

| Field | Description |
|---|---|
| Status | Displays the SLA Status. |
| Process Reference Number | Displays the Process Reference Number. |
| Branch | Displays the Branch. |
| Process Name | Displays the Process Name |
| Stage Name | Displays the Stage Name. |
| Customer ID | Displays the Customer Id. |
| Currency | Displays the Currency. |
| Amount | Displays the Amount. |

3. Click **Filter** icon to filter the data.

The **Filter by** screen displays.

**Figure 1-26    Filter By**



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

**Table 1-11    Filter By – Field Description**

| Field | Description |
|---|---|
| Customer Id | Click **Search** icon and select the Customer Id from the list |
| Branch | Select the required Branch Code & Name from the drop-down list. |
| Process Name | Select the process name. |
| From Date | Select the date from when the SLA information needs to be fetched. |
| To Date | Select the date till when SLA information needs to be fetched. **Note** : By default branch date will be shown. |
| SLA Status | Select the **SLA Status** from the drop-down list. The available options are: <br>• **Within SLA** <br>• **nearBreach** <br>• **breached** |

# 2
# Alerts

This topic provides information about alerts.

Oracle Banking Origination supports alert to the external customers, and to the internal users for specified actions. The bank customers may require critical information on their applications to help them take appropriate actions. The bank staff may also require certain information on the customer applications that they may have initiated or have been working on. A business alert is a message that conveys such information by e-mail to the external customer or by bell notification to the internal application users.

Oracle Banking Origination generates business alerts for the bank staff as well as bank customers. The alerts are generated to the customers and staff at specified events.

This topic contains the following subtopics:

**Events triggering E-mail Notifications to the customer**

Below mentioned events in the Application Processing, triggers e-mail notification to the customer:

- Offer Issue
  On submit of the **Offer Issue** stage, the system triggers an e-mail notification with the Offer Document to the e-mail IDs of the customers.

- Clarification Request
  If Clarification request is raised for an application, system triggers an e-mail notification with the clarification details to the e-mail IDs of the customers.

The E-mail notification are sent to the customer's e-mail ID from the configured bank user ID in the Property table. The e-mail template can include the login link to the Digital Banking website maintained in the Property table so that customer is re-directed to the Bank's Digital Banking login page and take required action on the notification raised.

**Events triggering Bell Notification to the internal application user**

Below mentioned events in the Application Processing trigger bell notification to the internal users:

- Action on Offer Issued from digital channel by the customer
  The possible actions that the customer can take on the offer issued to them from Digital channel are Accept, Reject or Amend. Once the customer takes an action from the digital channel, system raises bell notification to user who has initiated the application.

- Manual Conversation updated for Clarification Request
  If any conversation is updated manually by internal application user on the clarification request raised, system triggers a bell notification to the user who has raised the request. This allows the user to take immediate action on the response received for the clarification request.

# A

# Error Code and Messages

This topic contains the error codes and messages.

**Table A-1    Error Codes and Messages**

| Error Code | Messages |
| --- | --- |
| RPM-AT-003 | Failed to fetch user hierarchy information from sms-core-services |
| RPM-CMN-001 | Exception Occurred while Executing Query |
| RPM-CMN-002 | Number format exception |
| RPM-CMN-003 | Server Error Occurred during API call |
| RPM-CMN-004 | Illegal State Exception |
| RPM-CMN-005 | JTA Transaction unexpectedly rolled back |
| RPM-CMN-006 | Exception Occurred while creating Bean |
| RPM-CMN-007 | Internal server error occurred |
| RPM-CMN-009 | InValid date format |
| RPM-CMN-010 | toDate is greater than fromDate |
| RPM-COM-001 | JSONException Occured |
| RPM-DB-001 | Error occured in Dashboard Util |
| RPM-DB-002 | Error while getting reportees |
| RPM-DB-003 | Error occured while getting current Half year |
| RPM-DB-004 | Error occured while getting current Quarter |
| RPM-DB-005 | Error occured while fetching Dashboard data from DB |
| RPM-DS-030 | Could not resolve the filter criteria |
| RPM-MN-001 | Error while fetching $1 from maintenance table |

# B
# Functional Activity Code

This topic contains the functional activity codes.

**Table B-1    Functional Activity Code**

| Screen Name | Functional Activity Code |
|---|---|
| **Account Opening Trends** | RPM_FA_PROCESS_DRIVER_Dashboard_ACCOUNT_OPENING_TREND |
| **Application Search** | RPM_FA_WD_MY_SEARCH |
| **Conversion Analysis** | RPM_FA_PROCESS_DRIVER_Dashboard_CONVERSION_ANALYSIS |
| **Loan Exposure to Collateral** | RPM_FA_PROCESS_DRIVER_Dashboard_COLLATERAL |
| **Loan Offers Near Expiry** | RPM_FA_WD_MY_LOAN_EXPIRY |
| **Loan Offer Status** | RPM_FA_PROCESS_DRIVER_Dashboard_LOAN_OFFER_STATUS |
| **Loan Pipeline** | RPM_FA_PROCESS_DRIVER_Dashboard_PARKEDLOAN |
| **My Applications** | RPM_FA_DASHBOARD_MY_APPLICATIONS |
| **My Applications** | RPM_FA_PROCESS_DRIVER_Dashboard_MY_APPLICATION |
| **Product Application Near Expiry** | RPM_FA_WD_MY_PRODUCT_EXPIRY |

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