# Oracle® Banking Origination Getting Started User Guide



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ORACLE

Oracle Banking Origination Getting Started User Guide, Release 14.8.0.0.0

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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 you 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 new products in your bank.

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# 1 Welcome to Getting Started User Guide

This topic provides an overview of getting started user guide.

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

This document is intended for the Customer Service Representatives (CSRs) and staff in charge of setting up new products in your bank.

Thissection contains the following topics



# 2 Access Application

Youcan access any application using the link provided by the administrator. Contact the adminis- trator for the URL and the login credentials. For more information on Users and Roles, refer to **Oracle Banking Security Management System User Guide**.

### Sign In

To sign in the product application:

1. Specifythe URL in the browser address and press Enter. The Sign In page appears.

| ORACLE      |
|-------------|
| User Name * |
| Password *  |
| Sign In     |
|             |

Figure 2-1 Sign In

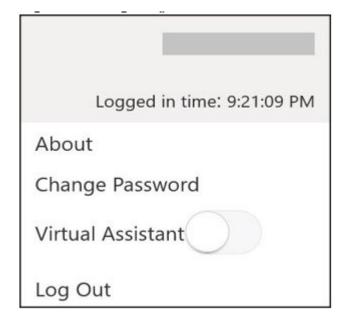
- 2. In the User Name field, enter the user name using which you wish to login.
- 3. In the **Password** field, enter the set password of the entered user name.
- 4. Click**SignIn** to log in to the application.

#### Logout

- **1.** In the selected application navigate to the **Toolbar**.
- 2. Under **Toolbar**, click the user name logged into the application. TheUser Profile fly-out menu appears.



Figure 2-2 Log Out



# 3 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.

| enu Item Search       | Q Dashboard         |         |                |                       |              |                  |              |                        |   |                                  |   |
|-----------------------|---------------------|---------|----------------|-----------------------|--------------|------------------|--------------|------------------------|---|----------------------------------|---|
| Menu                  | Conversion Analysis | ∀ ×     | Product Applic | ations Near Ex        | piry ∇ ×     | Loan Exposure    | To Collatera | v ∧                    | New Current Account   | τ Χ                              |   |
|                       | FILTERS NA ALL MON  | HLY C X | FILTERS GBP    | 006 AL                | E (NA) >     |                  | 006          | ALLE (MON >            | FILTERS GBP ALL MO  | NTHLY >                          |   |
| estomer Search        | Me Team             |         | O 0 Expiring   |                       |              | 188              |              |                        |   |                                  |   |
| ishboar l             |                     |         | Next 2 Days    | Next 5 Days           | Next 10 Days | 0.08             |              |                        | No data to display  |                                  |   |
| le Management         | 25.00%              | Cpened  | •              | •                     | 0            | 00               | Mallor 20    |                        | NO DATA TO ONDRAY   | 1.1                              |   |
| achine Learning       |                     |         |                |                       |              | Total Loan Value |              | al Taken Against Loans |   |                                  |   |
| rty Business Process  | >                   |         | -              |                       | -            |                  |              |                        | in .  |                                  |   |
| rty Services          | SLA Status Summary  |         |                |                       |              |                  |              | A ×                    | My Applications 🔳 🕴 Ne                                      | Application                      |   |
| tail Banking          |                     |         |                |                       |              |                  |              |                        | 1 Ö 💩 🏨   |                                  |   |
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| -<br>urity Management |                     |         |                | . NO BROK TO OTHERARY |              |                  |              |                        | 1 1 1 0   | 1 0                              |   |
| k Management          |                     |         |                |                       |              |                  |              |                        |   | All<br>Priority                  |   |
| ks                    |                     |         | Within SLA     | A E Neering SLA       | SLA breached |                  |              |                        | I Martin  |                                  | 1.1.1.1   |
| ks                    | · · · ·             |         |                |                       |              |                  |              |                        | New Loan Account  | X V                              |   |
|                       |                     |         |                |                       |              |                  |              |                        | FILTERS GBP ALL MO  | NTHLY O                          |   |
|                       |                     |         |                |                       |              |                  |              |                        |   |                                  |   |
|                       |                     |         |                |                       |              |                  |              |                        | No data to display  |                                  |   |
|                       |                     |         |                |                       |              |                  |              |                        | ue rara lo rashak   |                                  | A STATE OF A |
|                       |                     |         |                |                       |              |                  |              |                        |   |                                  |   |
|                       |                     |         |                | -                     |              |                  | _            |                        |   |                                  |   |

#### Figure 3-1 Application Environment

#### **Call-out details**

- 1. HamburgerMenu:Use to expand/collapse the menu.
- 2. Menu:Use to navigate/open the screens associated with the application.
- 3. **Sub-Menu**:Click to view the sub-menus associated with the menu. These screens are associated with the menu depending on the user privileges.
- 4. DisplayGrid: Displays the screens/dashboards selected using the menu.
- 5. **BankName**:Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user.

#### Note:

Dependingon the logged in user and the branches associated, you can switch between branches and view the records

6. **ApplicationDate**:Displays the application date on which the branch's EOD was last performed.



- 7. UserProfile:User profile related options and actions are available.
- Screen Environment This topic describes about the various components in the screen environment.

### 3.1 Screen Environment

This topic describes about the various components in the screen environment.

There are three types of screens in the application.

- Dashboard
- Maintenance Screen
- Summary Screen
- Dashboard
   This topic describes about the various components in the dashboard.
- Summary Screen This topic describes about the various components on the summary screen.
- Maintenance Screen This topic describes about the various components in the maintenance screen.

### 3.1.1 Dashboard

This topic describes about the various components in the dashboard.

Depending on the access/permission provided to the logged-in user, the user can view the dashboards associated with the user. These dashboard helps the user to analyse the situation and take the necessary actions.

Asample screenshot of Dashboard is shown below:

| onversion Analysis $\nabla$ X | Product Applications Near Expiry $	au 	imes$ | Loan Exposure To Collateral $	au	imes$ X                         | New Current Account     | × My Applications 3 + New Application  |
|-------------------------------|--|--|-------------------------|--|
|                               | FILTERS GBP 006 ALL NA >                     | FILTERS GBP 006 ALL MON >  | FILTERS GBP ALL MONTHLY |  |
| Me Team                       | O 0 Expiring                                 | 188  |                         | Custome Sevines  |
|                               | Next 2 Days Next 5 Days Next 10 Days         | 0.48   |                         | Custome Savings Current Term Credit<br>Onboerd Account Loans Account Deposits Cards<br>1 1 1 0 1 0 |
| Opened                        | 0 0  | 0.0  | No data to display      |  |
| 25.00%                        |  | MARCH 2018 Total Loan Value Total Collateral Taken Against Loans |                         | All<br>Priority  |
|                               |  |  | ш                       | Medium 3   |
| LA Status Summary             |  | $\forall \times$   | New Loan Account        |  |
|                               |  |  | FILTERS GBP ALL MONTHLY | FILTERS GBP ALL MONTHLY 3  |
|                               |  |  |                         |  |
|                               | No data to display                           |  | No data to display      | No data to display   |
|                               |  |  | the entry organity      | The deterior or graphing   |
|                               | Vithin SLA Nearing SLA SLA breached          |  |                         |  |
| <                             | Within SLA Nearing SLA SLA breached          |  |                         |  |
|                               |  |  | Loan Offer Status       | ▼ ×  |
|                               |  |  |                         | N >  |
|                               |  |  | 20                      |  |
|                               |  |  | 2140 245 Bank Reject    |  |
|                               |  |  | Customer Accep          |  |

#### Figure 3-2 Dashboard



### 3.1.2 Summary Screen

This topic describes about the various components on the summary screen.

Depending on the access/permission provided to the logged in user, the user can access the summary screen. The summary screen provides the information about the configured records, where the user can perform few common actions and view the records.

Figure 3-3 Summary Screen

| + 0  |  |  |                              |                              |                                   |                                     |  |
|--|--|--|------------------------------|------------------------------|-----------------------------------|-------------------------------------|--|
| sectionaire Code:<br>BBDAIRS01             | Questionnaire Code:<br>TestQ3011             | Questionnaire Code:<br>QUEST1                | Questionnaire Code:<br>Q1010 | QUESTCODE1                   | Questionnaire Code:<br>QSP001     | Questionnaire Code:<br>QUEST121     |  |
| escription Bandhan Bank IRS<br>roduct. OBO | Description TestQ3011<br>Product OB0         | Description QUEST1<br>Product OB0            | Description Q1010<br>Product | Description QDESC<br>Product | Description QSP001<br>Product 080 | Description QUEST121<br>Product 080 |  |
| Authorized 🔓 Open 🖄 1                      | D Authorized 🙆 Open 🖄 1                      | D Unauthorized 🙆 Open 🛃 1                    | D Unauthorized & Open 25     | D Unauthorized & Open 21     | D Authorized 🖉 Open 🖾 1           | D Unauthorized 🔓 Open 🖾 1           |  |
| vetonnerre Code:<br>4L Q101                | Questionnalite Code:<br>QUR_REGE             | Questionname Code:<br>QUR_COPPA              |                              |                              |                                   |                                     |  |
| escription Questionaire for Ho             | Description REG E regulation code<br>Product | Description questionnaire for<br>Product OB0 |                              |                              |                                   |                                     |  |
| rosuct OBO                                 |  |  |                              |                              |                                   |                                     |  |
| hosuct. 080<br>DAutherized & Open 231      | D Authorized & Open 121                      | D Authorized & Open D 1                      |                              |                              |                                   |                                     |  |
| Authorized 🔓 Open 🔯 1                      |  |  |                              |                              |                                   |                                     |  |
| Authorized 🔓 Open 😰 1                      | D Authorized 🔓 Open 🔯 1                      |  |                              |                              |                                   |                                     |  |

#### **Call-out details**

- 1. Search: Click to search/view a record from a selected summary screen.
- 2. Refresh:Click to refresh all records configured in the selected summary screen.
- 3. Add:Click to create/configure a new record.
- 4. Pagination: Displays the number of items available and the page numbers.
- Title bar: Displaysthe name of the screen and couple of common actions such as minimize and remove. For more information, refer to 1.3.15 Minimizing Records and 1.3.16 Closing Records.
- 6. **Records**: Displays the configured records, you can view the records in different format. For more information, refer to **1.3.2 Viewing Records**.
- 7. TileView: Displays the configured records in the tile format.
- 8. ListView: Displays the configured records in the list format.

### 3.1.3 Maintenance Screen

This topic describes about the various components in the maintenance screen.

Depending on the access/permission provided to the logged-in user, the user can access the create screen. The create screen allows the user to create/configure the new records using the fields associated with the selected create screen. These new records can also be saved.



#### Figure 3-4 Maintenance

| Questionnaire Maintenance |                         | ;; ×    |
|---------------------------|-------------------------|---------|
| Regind                    | Questionning Securition |         |
| Create                    |                         |         |
|                           |                         | Preview |
| Add Question              |                         |         |
|                           |                         |         |
|                           |                         |         |
|                           |                         |         |
|                           |                         |         |
|                           |                         |         |
|                           | Cancel                  | Save    |

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

#### **Call-out Details**

- Fields: Displays the fields associated with the selected maintenance screen. There are several typesof fields such as text box, dropdown, and so on, these fields can also be either manda- tory or options fields. For more information, refer to Mandatory and Optional Fields.
- 2. Title bar: Displaysthe name of the screen and couple of common actions such as minimize and remove. For more information, refer to Minimizing Records and Closing Records .
- 3. Save:Click Saveto save the specified details in the maintenance screen.
- 4. Cancel: Click Cancel to reset the specified details in the maintenance screen

# 4 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.

- Access the Records This topic provides the systematic instructions to access the records.
- View the Records This topic describes about the various formats to view the records.
- Search the Records This topic provides the systematic instructions to search the records.
- Refresh the Records This topic provides the systematic instructions to refresh the records.
- Creating / Configuring the Records
   This topic provides the systematic instructions to create / configure the records.
- Copy the Records This topic provides the systematic instructions to copy the record.
- Unlock the Records This topic provides the systematic instructions to unlock the record.
- Reopen the Records This topic provides the systematic instructions to reopen the record.
- Delete the Records This topic provides the systematic instructions to delete the record.
- Print the Records This topic provides the systematic instructions to print the record.
- Authorize the Records This topic provides the systematic instructions to authorize the record.
- Minimize and Maximize the Records This topic provides the systematic instructions to minimize and maximize the records.
- Close the Records This topic provides the systematic instructions to close the record.
- Audit the Records
   This topic provides the systematic instructions to audit the record.



# 4.1 Access the Records

This topic provides the systematic instructions to access the records.

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

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.

## 4.2 View the Records

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

You can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster. A few different formats to view the records are described.

#### **Tile View**

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

A sample screenshot is shown below:



#### Figure 4-1 Tile View

| Butteres Process Code:       I       Butteres Process Code:       Butteres Process Code: | iew Business Process                   |   |                                       |   |   |   | 11  |
|---|--|---|---------------------------------------|---|---|---|-----|
| PAMD       I       POOB       I       SMBA       I       REOB       I       CPOB       I       CAMD       I         Description       Party Amendment       Description       Prantial Institution       Description       SMB Amendment       Description       Real Onboarding       Description       Campot Amendment       Description       Real Onboarding       Description       Campot Amendment       Description       SME Amendment       Description       Real SME Onboarding       Descript   | . 0                                    |   |                                       |   |   |   | 993 |
| Life Cycle       PartyAmendment       Life Cycle       Prancess   | Business Process Code:<br>PAMD         |   |                                       |   |   |   |     |
| Burress Process Code:     :     RS/MB     ::     Burress Process Code:     ::     RS/MB     ::     ::     Burress Process Code:     ::     ::     RS/MB     ::<   | Life Cycle -<br>Process PartyAmendment | Life Cycle<br>Process Financial Instituion    | Life Cycle -<br>Process SMB Amendment | Life Cycle -<br>Process Retail Onboarding | Life Cycle -<br>Process Corporate Party | Life Cycle -<br>Process Corporate Amendment |     |
| CSME     :     FPAM     :     SMEA     :     RSMB     :       Description     SME Party Onbearding<br>Indexes     Description<br>SME Party Onbearding<br>Business     Description<br>(E < cycle)  | 🕻 Authorized 🔓 Open 🖉 1                | 🕻 Authorized 🔓 Open 🖾 1                       | £ Open ⊠1                             | C Authorized 🔓 Open 🖾 1                   | 🗅 Authorized 🔓 Open 🖾 1                 | C Authorized 🔓 Open 🖾 1                     |     |
| Life Cycle     SME Party Onboarding     Life Cycle     Financial Institution     Life Cycle     MA Amendment     Life Cycle     Process       Business     SME Party Onboarding     Business     Financial Institution     Life Cycle     Process     Business     SMB Onboarding       Database     Bosiness     Financial Institution     Examples     Bosiness     SMB Onboarding       Database     Bosiness     SME Amendment     Life Cycle     Process     Business     SMB Onboarding   |  |   |                                       |   |   |   |     |
|   | Life Cycle -                           | Life Cycle -<br>Process Financial Institution | Life Cycle -<br>Process SME Amendment | Life Cycle -<br>Process SMB Onboarding    |   |   |     |
| ge 1 of 1 (1-10 of 10 memo) (c + 1 + 3)   | D Authorized 🔓 Open 🖾 1                | 🗅 Authorized 🔓 Open 🖉 1                       | DAuthorized 🔓 Open 🖾 1                | 🖸 Authorized 🔓 Open 🖾 1                   |   |   |     |
|   | ge 1 of 1                              | (1-10 of 10 items)    ζ → (1) → )             |                                       |   |   |   |     |
|   |  |   |                                       |   |   |   |     |
|   |  |   |                                       |   |   |   |     |
|   |  |   |                                       |   |   |   |     |

#### **Tile View with Context Menu**

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

| Figure 4-2 | Tile View with Context Menu |
|------------|-----------------------------|
| Figure 4-2 | Tile View with Context Menu |

| Questionnaire Code:                         | Questionnaire Code:                  | Questionnaire Code:              | Questionnaire Code:                | Questionnaire Code:                     |  |
|---|--------------------------------------|----------------------------------|------------------------------------|---|--|
| BBQAIRS01                                   | TestQ3011                            | QUEST1                           | Q1010                              | QUESTCODE1                              |  |
| Description Bandhan Bank IRS<br>Product OBO | Description TestQ3011<br>Product OBO | Description QUEST1 Product OBO ~ | View ion Q1010<br>Authorize OBO    | Description QDESC<br>Product OBO        |  |
| 🗈 Authorized 🔒 Open 🖾 1                     | 🗅 Authorized 🔒 Open 🖾 1              | D Unauthorized 🔓 Open   🛱        | Delete<br>Unlock thorized Copen 25 | Dunauthorized 🔓 Open 🖾 1                |  |
| Questionnaire Code:                         | Questionnaire Code:                  | Questionnaire Code:              | Questionnaire Code:                | Questionnaire Code:                     |  |
| QSP001                                      | QUEST121                             | HLQ101                           | QUR_REGE                           | QUR_COPPA                               |  |
| Description QSP001                          | Description QUEST121                 | Description Questionaire for Hom | Description REG E regulation code  | Description questionnaire for QUR_COPPA |  |
| Product OBO                                 | Product OBO                          | Product OBO                      | Product OBO                        | Product OBO                             |  |
| 🗅 Authorized 🔓 Open 🖾 1                     | 🗅 Unauthorized 🔓 Open 🗹 1            | 🗅 Authorized 🔓 Open 🖾 1          | D Authorized 🔓 Open 🗹 1            | C Authorized 🔓 Open 🖾 1                 |  |

#### **Call -Out Details**

- **ContextMenu**: The icon appears only to the selected number of screens. The context menu allows you to perform actions that are associated with the record.
- ContextMenu Flyout: A list of all of the actions appear, and the list of actions depend on the status of the record

### 4.3 Search the Records

This topic provides the systematic instructions to search the records.

Youcan search the required number of records.



1. In the selected screen, click **Search**, the fields associated with the selected screen appear in a drop-down menu.

A sample screenshot is shown below.

| Search Filter               | × |
|-----------------------------|---|
| Questionnaire Code<br>Q1010 |   |
| Description                 |   |
| Authorization Status        |   |
| Record Status               |   |
| Search Reset                |   |

#### Figure 4-3 Searching Records

- 2. Provide the required details associated with the selected screen.
- 3. Click **Search**. The requested record displays.

# 4.4 Refresh the Records

This topic provides the systematic instructions to refresh the records.

In the selected screen, click **Refresh**, the records associated with the selected screen is updated with the latest details.

# 4.5 Creating / Configuring the Records

This topic provides the systematic instructions to create / configure the records.

Youcan create/configure records with any of the following two ways:

- 1. In the selected view screen, click Add icon to create/configure a record.
- On the menu, select a sub-menu and click <Create name of the screen>.
   The Create or Configure the record screen shown for reference.

#### Figure 4-4 Create or Configure the record

| Create Fact     |             |                   |     | :: ×              |
|-----------------|-------------|-------------------|-----|-------------------|
| New Bulk Upload |             |                   |     |                   |
| Fact            |             |                   |     |                   |
| Code            | Description | Product Processor | Tag |                   |
| Required        | Required    | Q                 |     |                   |
| Туре            | Negurea     | Required          |     |                   |
| NUMBER          |             |                   |     |                   |
| Save            |             |                   |     |                   |
|                 |             |                   |     | Download Template |

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

The Save - Confirmation Message popup screen displays.

| Figure 4-5     | Save |  |
|----------------|------|--|
| ROTTENIL STATE |      |  |

| Disco provide concerns (if an ) |  |
|---------------------------------|--|
| Please provide remarks (if any) |  |
| Remarks                         |  |
|                                 |  |

- 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 **Auditing Record** topic for the detailed explanation.

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

## 4.6 Copy the Records

This topic provides the systematic instructions to copy the record.

Perform the following steps to copy a record.

- 1. In a selected screen, click a record.
- 2. Click Copy to copy the selected record details and do the required changes to the record.
- Click Save to save the modified record.

## 4.7 Unlock the Records

This topic provides the systematic instructions to unlock the record.

Perform the following steps to unlock a record.

- 1. In a selected screen, click a record.
- 2. Click **Unlock** to unlock the selected record details and do the required changes to the record.
- 3. Click **Save** to save the modifed record.

## 4.8 Reopen the Records

This topic provides the systematic instructions 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.

# 4.9 Delete the Records

This topic provides the systematic instructions 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.
- Click the record that needs to be deleted.
- 3. Click Delete.

The selected record is deleted.

## 4.10 Print the Records

This topic provides the systematic instructions to print the record.

- 1. Navigate to Summary screen.
- 2. Click the record that needs to be printed.
- Click Print to view the record in a print format. The selected record is printed.

### 4.11 Authorize the Records

This topic provides the systematic instructions to authorize the record.

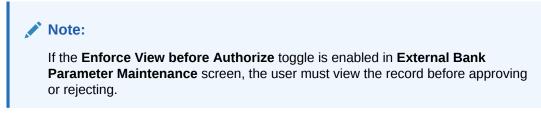
- 1. Navigate to **Summary** screen.
- 2. Click  $\frac{1}{2}$  icon on the unauthorized record which needs to be authorized.

3. Click Authorize.

The Authorization screen displays.

| View Host Code  | ;; ×             |
|---|------------------|
| Q + 0   | 8≡ 88            |
| Mod Number1 Compare   |                  |
| Done By         SURBHIT           Done On         3/30/2018           Record Status Orgen |                  |
| Once Auth No View   |                  |
| VEN   | Cancel Reject Ap |

4. Click View to view the record.



- 5. Click **Cancel** to cancel the authorization of the record.
- 6. Select the required modification number that must be approved/rejected.



To approve the record:

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

The Approve - Confirmation Message popup screen displays.

| Confirm            |                               |        |
|--------------------|-------------------------------|--------|
| Are you sure you w | nt to approve? Please confirm |        |
| Remarks            |                               |        |
| 1                  |                               |        |
|                    |                               |        |
|                    |                               | Cancel |

Figure 4-7 Confirmation

- 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 Reject - Confirmation Message popup screen displays.

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 Record** topic for the detailed explanation.

14. Click **Cancel** to discard the rejection.

## 4.12 Minimize and Maximize the Records

This topic provides the systematic instructions to minimize and maximize the records.

In the selected screen, click Collapse to minimize the screen. The minimized screen appears at the bottom left corner of the screen. You can click to maximize the screen.



## 4.13 Close the Records

This topic provides the systematic instructions to close the record.

In the selected screen, click Remove to close the screen. If you are in the middle of creating/ modi- fying the records in a selected screen, an error/warning message appears prompting to save the changes.

# 4.14 Audit the Records

This topic provides the systematic instructions to audit the record.

- 1. Navigate to Summary screen.
- 2. Click <sup>§</sup> 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 4-8 Audit Details

| Maker                    | Checker         |
|--------------------------|-----------------|
| 은 SURBHI1                | 2               |
| 园 3/30/2018, 11:15:30 AM | 節               |
|                          |                 |
| Status                   | Modification No |
| Status                   | Modification No |
|                          |                 |

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.

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



# 5 Screen / Dashboard

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

#### Pagination

The number of records are displayed on the bottom left corner of the selected view screen. Dependingon the records available the number of pages appear. You can navigate using the first page, last page, previous page, next page and by using the numbers option.

#### **Mandatory and Optional Fields**

There are mandatory and optional fields available for any screen. Mandatory fields are mentioned as **Required**. If you try 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.

#### **Removing Tile**

Click **Remove** to remove the dashboard widget from the landing page. The removed widgets are available under the **Add Tiles** option.

#### **Reordering Tile**

Selectand drag the **Dragto Reorder** option to drop the dashboard widget at the desired place. The page is automatically refreshed and displays the updated order.

#### **Expanding Tile**

Click**ExpandTile** to view all the information of the dashboard widget. The expanded widget appears on a complete row to view more information.

#### **Adding Tile**

Perform the following steps to add a tile.

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

The Clickon tiles to add Dashboard pop-up appears.



| CIICK ON L    | tiles to add them                    | > |
|---------------|--------------------------------------|---|
| Select a tile | le to add it to the dashboard        |   |
|               | Conversion Analysis                  |   |
|               | Conversion Analysis Description      |   |
|               | Stage Wise Loans Detail              |   |
|               | Stage Wise Loans Details Description |   |
|               | Loan Opening Trend                   |   |
|               | Loan Opening Trend Description       |   |

Figure 5-1 Click on tiles to add Dashboard

2. Click on the dashboard you want to add to the dashboard landing page. The page is automatically refreshed and displays the added dashboard widget

# 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.

| 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.           |
| Сору        | 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.  |
| Approve     | Approve 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.                           |
| <u> </u>    | Move back all the selected list of records to the available list of grid.                      |

Table 6-1 List of Buttons/Icons

# 7 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.

| 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 <b>Create External Customer</b> 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 <b>Create External Customer Account</b> 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 <b>Create Upload Source</b> 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 <b>Create Host Code</b> 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 <b>Create Currency Definition</b> screen.  |
| Status          | <ul> <li>Displays the status of the record.</li> <li>Authorized: The record is verified and authorized.</li> <li>Unauthorized: The record is not verified.</li> <li>Rejected: The record is rejected.</li> <li>Open: The record is open and waiting for verification.</li> <li>Locked: The record is locked.</li> <li>Closed: The record is closed.</li> </ul> |

| Table /-1 Common Fields | Table 7-1 | Common | Fields |
|-------------------------|-----------|--------|--------|
|-------------------------|-----------|--------|--------|

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