

# Oracle® Banking Originations Cloud Service

## Alerts and Dashboards User Guide



Release 14.8.1.0.0  
G43401-01  
October 2025

ORACLE®

Copyright © 2021, 2025, 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                     | i   |
| Before you begin            | i   |
| Module Prerequisite         | i   |
| Audience                    | i   |
| Documentation Accessibility | ii  |
| Diversity and Inclusion     | ii  |
| Conventions                 | ii  |
| Screenshot Disclaimer       | ii  |
| Acronyms and Abbreviations  | ii  |
| Symbols and Icons           | iii |
| Module Post requisite       | v   |

## 1 Dashboards

---

|      |                                 |    |
|------|---------------------------------|----|
| 1.1  | My Applications                 | 2  |
| 1.2  | Application Search              | 9  |
| 1.3  | Conversion Analysis             | 10 |
| 1.4  | Account Opening Trend           | 11 |
| 1.5  | Stage Wise Details              | 13 |
| 1.6  | Loan Offer Status               | 15 |
| 1.7  | Loan Exposure to Collateral     | 17 |
| 1.8  | Applications Nearing Expiration | 18 |
| 1.9  | Loan Offers Nearing Expiration  | 19 |
| 1.10 | SLA Status Summary              | 21 |

## 2 Alerts

---

## A Error Code and Messages

---

## B Functional Activity Code

---

### Index

---

# Preface

This topic contains the following sub-topics:

- [Purpose](#)
- [Before you begin](#)
- [Module Prerequisite](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Conventions](#)
- [Screenshot Disclaimer](#)
- [Acronyms and Abbreviations](#)
- [Symbols and Icons](#)
- [Module Post requisite](#)

## Purpose

This guide is designed to help you to quickly get acquainted with the Oracle Banking Originations Cloud Service system. This guide provides an overview on the **Dashboard** widgets and **Alerts** available in Oracle Banking Originations Cloud Service and guides user through the various features in dashboards and notifications can are available respectively. This guide helps you conveniently make use of dashboards.

## Before you begin

Kindly refer to the **Getting Started User Guide** for common elements, including Symbols and Icons, Conventions Definitions, and so forth.

## Module Prerequisite

Specify the **User Name** and **Password**, and login to **Home** screen.

## 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.

## 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.

## Conventions

The following text conventions are used in this document:

| Convention      | Meaning                                                                                                                                |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b> | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.         |
| <i>italic</i>   | 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 that are used in this guide are as follows:

**Table 1** Acronyms and Abbreviations

| Abbreviation | Description  |
|--------------|--------------|
| DS           | Data Segment |

**Table 1 (Cont.) Acronyms and Abbreviations**

| Abbreviation | Description                               |
|--------------|-------------------------------------------|
| System       | Oracle Banking Origination Module         |
| OBA          | Oracle Banking Accounts                   |
| OBOCS        | Oracle Banking Originations Cloud Service |

## Symbols and Icons

The list of icons available on the screens are as follows:

**Table 2 Icons - Common**

| Icon | Function                                                 |
|------|----------------------------------------------------------|
|      | Minimize                                                 |
|      | Maximize                                                 |
|      | Close                                                    |
|      | Perform Search                                           |
|      | Open a list                                              |
|      | 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                                                  |
|      | Click this icon to add a new row.                        |
|      | Click this icon to delete a row, which is already added. |

Table 2 (Cont.) Icons - Common

| Icon                                                                                | Function        |
|-------------------------------------------------------------------------------------|-----------------|
|    | Calendar        |
|    | Alerts          |
|    | Unlock Option   |
|    | View Option     |
|    | New             |
|    | Enter query     |
|    | Execute query   |
|    | Copy            |
|   | Delete          |
|  | Save            |
|  | Search          |
|  | Advanced search |
|  | Clear all       |
|  | Reset           |
|  | Export          |
|  | Print           |
|  | View Details    |
|  | Sorting         |
|  | Citation        |

The list of icons available on the view screens are as follows:



**Table 3 Icons - Widget**

| Icon                                                                              | Function            |
|-----------------------------------------------------------------------------------|---------------------|
|  | Open status         |
|  | Unauthorized status |
|  | Rejected status     |
|  | Closed status       |
|  | Authorized status   |
|  | Modification Number |

## Module Post requisite

After finishing all the requirements, please log out from the Home screen.

# 1

## Dashboards

This topic provides the information about the Dashboards available in Oracle Banking Originations Cloud Service

Oracle Banking Originations Cloud Service 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 Originations Cloud Service 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 widget.
- [Application Search](#)  
This topic describes systematic instructions to view Application Search dashboard.

- [Conversion Analysis](#)  
This topic describes systematic instructions to view Conversion Analysis widget.
- [Account Opening Trend](#)  
This topic describes systematic instructions to view Account opening trend widget.
- [Stage Wise Details](#)  
This topic describes systematic instructions to display Stage Wise Details widget.
- [Loan Offer Status](#)  
This topic describes systematic instructions to view Loan Offer Status widget.
- [Loan Exposure to Collateral](#)  
This topic describes systematic instructions to view Loan Exposure to Collateral widget.
- [Applications Nearing Expiration](#)  
This topic describes systematic instructions to view Applications Nearing Expiration widget.
- [Loan Offers Nearing Expiration](#)  
This topic describes systematic instructions to view Loan Offers Nearing Expiration widget.
- [SLA Status Summary](#)  
This topic describes systematic instructions to view SLA Status Summary widget.

## 1.1 My Applications

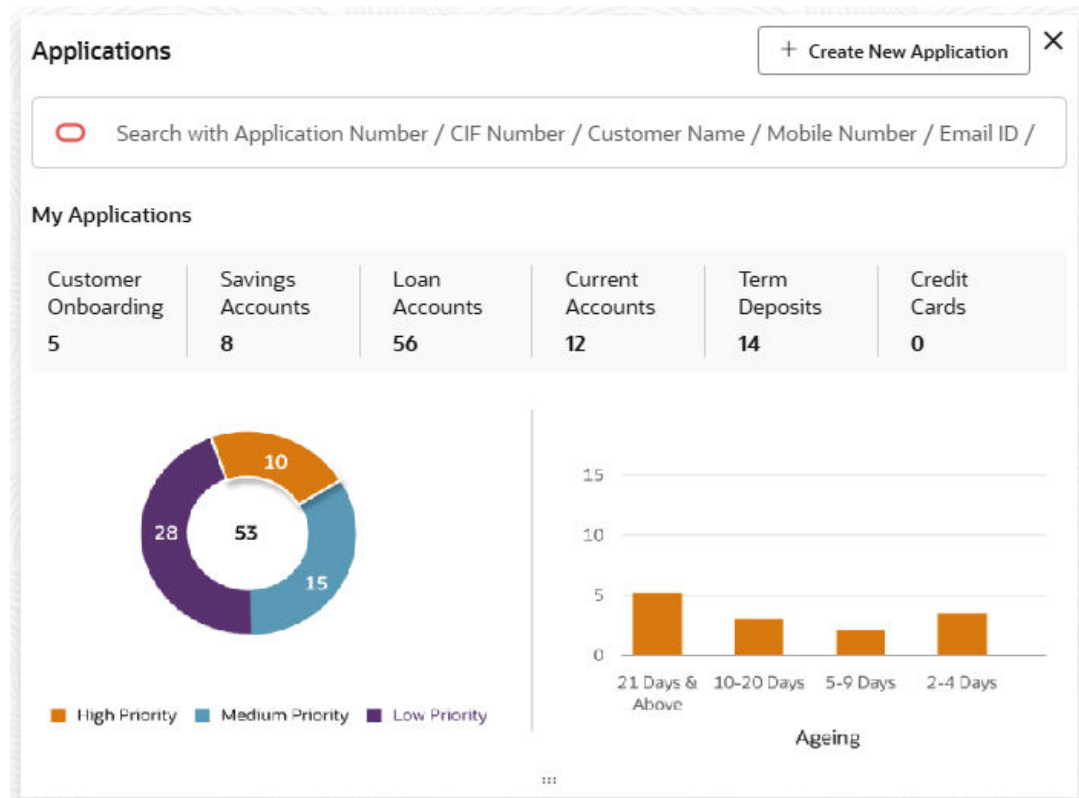
This topic describes systematic instructions to view My Applications widget.

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.

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

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

Figure 1-1 Applications



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

Table 1-1 My Applications – Field Description

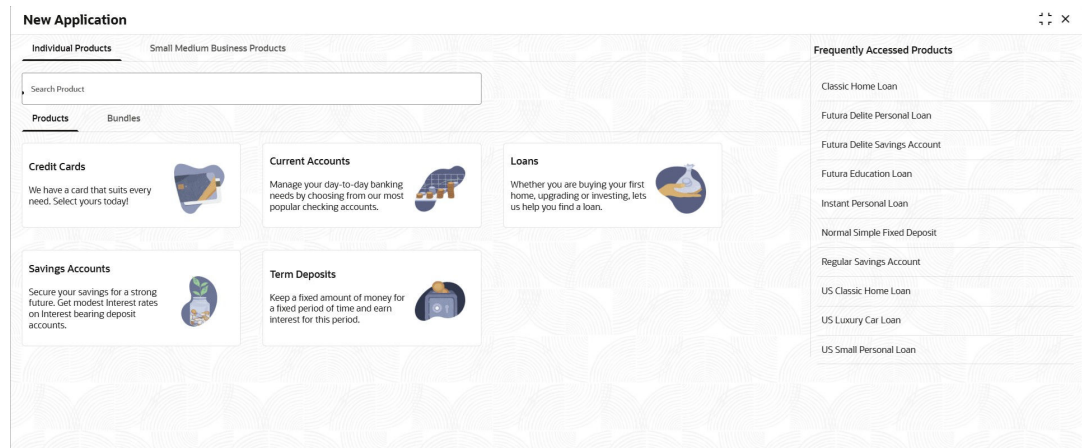
| Field                      | Description                                                                      |
|----------------------------|----------------------------------------------------------------------------------|
| <b>Customer Onboarding</b> | Displays the total number of new customer onboarding requests initiated.         |
| <b>Savings Accounts</b>    | Displays the total number of Savings Account requests initiated.                 |
| <b>Loan Accounts</b>       | Displays the total number of Loan Account requests initiated.                    |
| <b>Current Accounts</b>    | The application displays the total number of Current Account requests initiated. |
| <b>Term Deposits</b>       | The application displays the total number of Term Deposits requests initiated.   |

The **Pie chart** presents the overall count of applications initiated 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. Click **+ Create New Application** on the top right corner of the **Applications** widget.  
The **New Application** screen displays with the products.

Figure 1-2 New Application - Products



For more information on this screen, refer to the **Operations User Guide**.

3. Hover over the section of pie chart 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.

- **2-4 Days**
- **5-9 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.

4. Click on hyperlinked number inside the pie chart.

The **All Applications** screen displays a drill-down view that shows the list of applications.

Figure 1-3 All Applications

| Application Number | Application Date              | Customer Name          | CIF Number | Mobile     | Email                       | Unique ID | National ID | Appl Proc |
|--------------------|-------------------------------|------------------------|------------|------------|-----------------------------|-----------|-------------|-----------|
| 006APP000155221    | March 30, 2018 at 10:28:54 AM | SMB Ind20240809112021  | HEL004792  |            |                             |           |             |           |
| 006APP000155663    | March 30, 2018 at 5:40:16 AM  | SKR Enterprises        |            |            | sivadas.r@oracle.com        |           |             |           |
| 006APP000156493    | March 30, 2018 at 7:33:06 AM  | Plantation Corporation | HEL005153  |            |                             |           |             |           |
| 006APP000156494    | March 30, 2018 at 7:37:22 AM  | SMB Enterprises        |            |            |                             |           |             |           |
| 006APP000156500    | March 30, 2018 at 9:09:10 AM  | SM Agencies            |            |            | krsivadas@yahoo.co.in       |           |             |           |
| 006APP000159402    | March 30, 2018 at 11:53:24 AM | Mr. Brett G Dalton JR  | 006016104  | 1783499220 | krishnadas.r.pai@oracle.com | US894894  | US894894    |           |

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                                                         |
|----------------------------|---------------------------------------------------------------------|
| <b>Application Number</b>  | Displays the application reference number.                          |
| <b>Application Date</b>    | Displays the application date.                                      |
| <b>Customer Name</b>       | Displays the customer name.                                         |
| <b>CIF Number</b>          | Displays the Customer Information File number.                      |
| <b>Mobile</b>              | Displays the mobile number.                                         |
| <b>Email</b>               | Displays the e-mail ID.                                             |
| <b>Unique ID</b>           | Displays the unique ID of the customer.                             |
| <b>National ID</b>         | Displays the national ID of the customer.                           |
| <b>Application Process</b> | 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 Number**
  - **Customer Name**
  - **Mobile Number**
  - **Email ID**
5. Click on an application row to view more details about the application.
- The **Application Details Drill-Down** screen displays.

Figure 1-4 Application Details

Application Details

Application Number

006APP000060216

Application Date

March 30, 2018 at 5:16:18 AM

Channel

RPM

Sourced by

ABRIAN

Priority

Medium

Q

Go To

Max Savings Account

Related Task

Stage Details

1

2

3

4

5

6

7

8

9

10

11

12

Application Entry

Application Enrichment

Initial Funding

Underwriting

Assessment

Manual Credit Assessment

Manual Credit Decision

Account Parameter

Supervisory Approval

Offer Issue

Offer Accept/Reject

Post Offer

Completed

In Progress

Pending

Pending

Pending

Pending

Pending

Pending

Pending

Pending

Pending

Pending

Action

Assigned To

SIVADASI

Stage Start Date

March 30, 2018 at 5:21:53 PM

Time Spent

0 days 0 hours 0 min

In Progress

Expected Account Opening Date

Loan Amount

GBP 100,000.00

Total Time Spent

0 days 5 hours 50 min

Primary

KYC Compliant

David David Boon

Mr.

Customer 360

Date of Birth

May 21, 1985

Mobile

44 8448030163

Email

abc@gmail.com

CIF Number

0060160088

Joint

KYC Compliant

Jacob Luther Martin

Mr.

Customer 360

Date of Birth

May 24, 1990

Mobile

44 8448030163

Email

abc@gmail.com

CIF Number

0060160078

View Clarification Details

| ID            | Subject      | Raised By | Date                          | Status    |
|---------------|--------------|-----------|-------------------------------|-----------|
| INSUS00000404 | Request      | SIVADASI  | March 30, 2018 at 12:00:00 AM | Accepted  |
| INSUS00000405 | SD           | SIVADASI  | March 30, 2018 at 12:00:00 AM | Withdrawn |
| INSUS00000406 | Test - 5     | SIVADASI  | March 30, 2018 at 12:00:00 AM | Requested |
| INSUS00000407 | Test request | SIVADASI  | March 30, 2018 at 12:00:00 AM | Requested |

5

March 30, 2018 at 12:00:00 AM

SIVADASI

SA

Advices

| Advice Name    | Event             | Recipients                                             | Mode of Delivery | Delivery Details                                           | Status Details | Action |
|----------------|-------------------|--------------------------------------------------------|------------------|------------------------------------------------------------|----------------|--------|
| LoanInitiation | RPM_RLNORG_APPEN  | David David Boon, Jacob Luther Martin, Brett G Dalton, | Email            | abc@gmail.com, abc@gmail.com, krishnadas.r.pai@oracle.com; |                |        |
| LoanCrdScrInfo | RPM_RLNORG_ENRICH | Jacob Luther Martin,                                   | Email            | abc@gmail.com;                                             |                |        |

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 Number | Displays the application number.                                                                                                                         |
| Application Date   | Displays the date and time on which the application was initiated.                                                                                       |
| Channel            | Displays the channel name.                                                                                                                               |
| Source By          | Displays the name of the user who has sourced the application.                                                                                           |
| Priority           | Displays the priority of the application. <ul style="list-style-type: none"> <li>High</li> <li>Medium</li> <li>Low</li> </ul>                            |
| Refresh            | Click  to retrieve recent changes or updates made to the application. |

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

| Field              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <Product Name>     | Displays the product name.<br>In case on multiple product, different tabs appears with the respective product name. User can click the product names to view the respective application details.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Stage Details      | In this section, all account opening stages appears with the status name and it's chronological order of the stage in the process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Action             | To perform below actions on the appeared stages, click the number of specific stage and select an option from the <b>Action</b> drop-down list: <ul style="list-style-type: none"> <li>• <b>Acquire &amp; Edit Task</b> : Select this option to acquire and edit the selected stage.</li> <li>• <b>Acquire Task</b>: Select this option to acquire the selected stage and it can be edited later.</li> <li>• <b>View Stage Details</b>: Select this option to view the stage details.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| User ID Assigned   | Displays the <b>User ID</b> of the user currently working on the product process. The label of this field changes dynamically based on whether the selected stage is <b>In Progress</b> or <b>Completed</b> . <ul style="list-style-type: none"> <li>• When user selects a <b>In Progress</b> stage, the label will display as <b>Assigned To</b>.</li> <li>• When user selects a <b>Completed</b> stage, the label will display as <b>Submitted By</b>. If the task was auto submitted, then the value for such Completed stages will be displayed as <b>Auto Submitted</b>.</li> <li>• For Pending and skipped stages, this field will be hidden.</li> </ul> <b>Note:</b> This field value appears blank if the product process task is not acquired by any user.                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Stage Start Date   | Displays the start date of the current stage. It also display time in hours, minutes and seconds.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Time spent         | Displays the days, hours and minutes spent on the current selected stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <Application Tile> | In this tile, user can view the application specific details. Below field appears in this tile with respective details: <ul style="list-style-type: none"> <li>• <b>&lt;Status of the Application&gt;</b>: Displays the current stage of the application</li> <li>• <b>Expected Account Opening Date</b>: Displays the date on which the account is opened. This field appears once the account opening process is completed.</li> <li>• <b>Account Number</b>: Displays the account number. This field appears once the account opening process is completed.</li> <li>• <b>Expected Account Opening Date</b>: Displays the date on which the account will be opened.</li> <li>• <b>&lt;Amount&gt;</b>: Displays the value based on the product. For example: <ul style="list-style-type: none"> <li>– For the loan account opening application, the label of this field appears as <b>Loan Amount</b>.</li> <li>– For the saving, term deposit and current account opting application. the label of this field appears as <b>Initial Funding Amount</b>.</li> </ul> </li> <li>• <b>Total Time Spent</b>: Displays the total time spent on the application from the first to last stage.</li> </ul> |



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

| Field                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <Applicant Details Tile>   | <p>In this tile, user can view the applicant details. Separate tiles appears for all the applicants that are involved in the application. Below field appears with the respective applicant details:</p> <ul style="list-style-type: none"> <li>• <b>Role of the Applicant</b></li> <li>• <b>Applicant Image</b></li> <li>• <b>Applicant Name</b></li> <li>• <b>Title</b></li> <li>• <b>Customer 360</b> : Click this link to view the 360 degrees view of the customer information. The Customer 360 screen appears with the details. Based on the customer type, refer to the <b>Retail 360 User Guide</b> and <b>Corporate 360 User Guide</b> from the party section.</li> <li>• <b>Date of Birth</b></li> <li>• <b>Mobile Number</b></li> <li>• <b>Email ID</b></li> <li>• <b>CIF Number</b></li> </ul> |
| View Clarification Details | <p>In this section, the user can view the clarification history. Below fields appear with the details:</p> <ul style="list-style-type: none"> <li>• <b>ID</b></li> <li>• <b>Subject</b></li> <li>• <b>Raised By</b></li> <li>• <b>Date</b></li> <li>• <b>Status</b></li> <li>• <b>Status updated on</b></li> <li>• <b>Actions</b>: User can <b>View</b> or <b>Download</b> the attached documents.</li> </ul> <p>On the click of the respective record the user can view the clarification content.</p>                                                                                                                                                                                                                                                                                                     |
| Advices                    | <p>In this section, the user view the advices generated in the process of account opening. Below fields appear with the details:</p> <ul style="list-style-type: none"> <li>• <b>Advice Name</b></li> <li>• <b>Event</b>: Displays the stage name on which the advice is generated.</li> <li>• <b>Recipients</b></li> <li>• <b>Mode of Delivery</b></li> <li>• <b>Delivery Details</b></li> <li>• <b>Status Details</b></li> <li>• <b>Actions</b>: User can <b>View</b> or <b>Download</b> the advices.</li> </ul>                                                                                                                                                                                                                                                                                          |
| Related Task               | <p>In this section, user can view the stages involved in process of application. The below fields are appear with details:</p> <ul style="list-style-type: none"> <li>• <b>Product Processor</b>: Displays the product which integrated with Oracle Banking Party.</li> <li>• <b>Process Name</b></li> <li>• <b>Process Reference Number</b></li> <li>• <b>Stage</b></li> <li>• <b>Status</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                    |

6. Click  to close window.

## 1.2 Application Search

This topic describes systematic instructions to view Application Search dashboard.

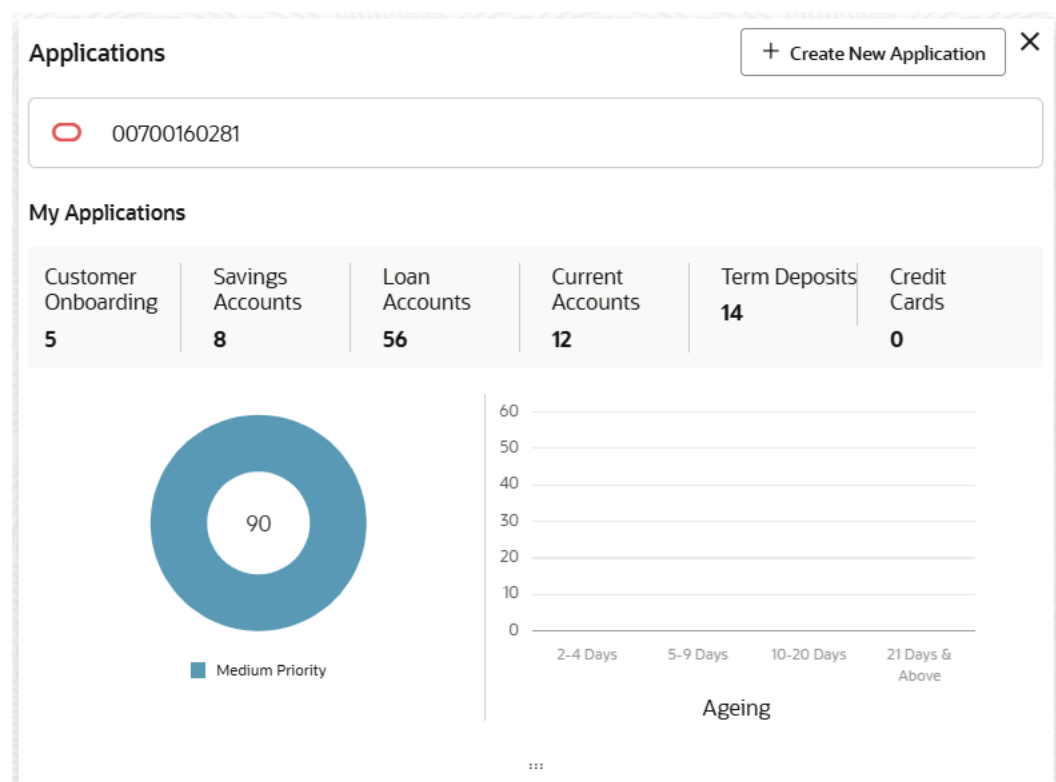
The **Application Search** dashboard allows the user to enquire an application through the various search criteria based on the following:

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

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

The **Application Search** widget displays in the **Dashboard** screen.

**Figure 1-5 Application Search**



2. Click **Search** icon.

It allows to view the application list and allows further drill-down to view the application details.

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

## 1.3 Conversion Analysis

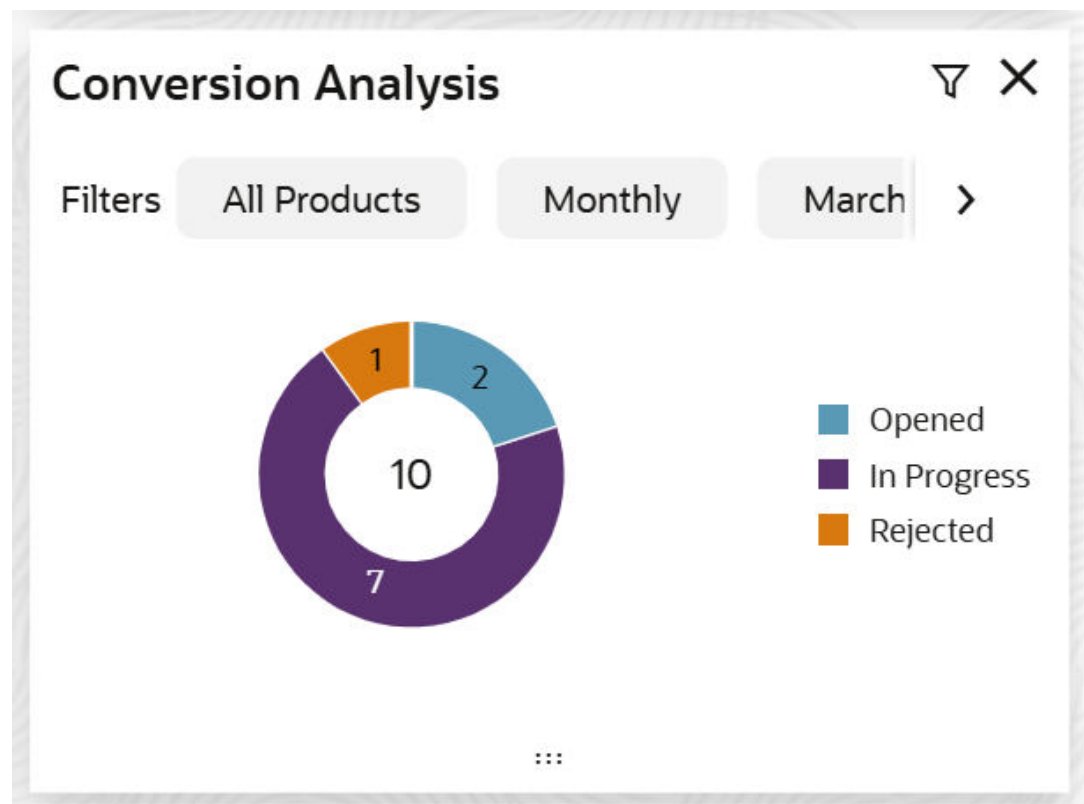
This topic describes systematic instructions to view Conversion Analysis widget.

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

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

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

**Figure 1-6 Conversion Analysis**



2. Click  to filter the data.

The available options are:

- **Products**
- **Sub-Products**
- **Period**
- **Select Month**
- **Display For**

By default, the system displays the month-wise conversion details of all the products originated for the current month. This widget provides splits across **Opened**, **In-Progress**, and **Rejected** for the products originated.

3. Hover over a section of the pie chart to view a specific status.

The pop-up displays the details below:

- **Status**
- **Total Count**

4. Click on hyper-linked number, to redirect to the **All Applications** screen.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-7 All Applications - Conversion Analysis**

| All Applications                                                                                                                      |                               |                  |                          |                       |            |
|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|------------------|--------------------------|-----------------------|------------|
| <input type="text"/> Search with Application Number / CIF Number / Customer Name / Mobile Number / Email ID / Unique ID / National ID |                               |                  |                          |                       |            |
| Application Number                                                                                                                    | Application Date              | Product Type     | Business Product Name    | Customer Name         | CIF Number |
| 006APP000159402                                                                                                                       | March 30, 2018 at 11:53:24 AM | Current Accounts | Premier Checking Account | Mr. Brett G Dalton JR | 006016104  |
| 006APP000159552                                                                                                                       | March 30, 2018 at 9:32:13 AM  | Savings Accounts | Max Savings Account      | Mr. Brett G Dalton JR | 006016104  |
| 006APP000159964                                                                                                                       | March 30, 2018 at 3:50:33 AM  | Home Loans       | US Classic Home Loan     | Mr. David Dravid Boon | 006016088  |
| 006APP000159979                                                                                                                       | March 30, 2018 at 8:24:26 AM  | Home Loans       | US Classic Home Loan     | Mr. David Dravid Boon | 006016088  |

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

**Table 1-4 All Applications – Field Description**

| Field                        | Description                                    |
|------------------------------|------------------------------------------------|
| <b>Application Number</b>    | Displays the application reference number.     |
| <b>Application Date</b>      | Displays the application date.                 |
| <b>Product Type</b>          | Displays the type of product.                  |
| <b>Business Product Name</b> | Displays the name of the business product.     |
| <b>Customer Name</b>         | Displays the customer name.                    |
| <b>CIF Number</b>            | Displays the Customer Information File number. |
| <b>Status</b>                | Displays the status of each application.       |
| <b>Mobile</b>                | Displays the mobile number.                    |

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

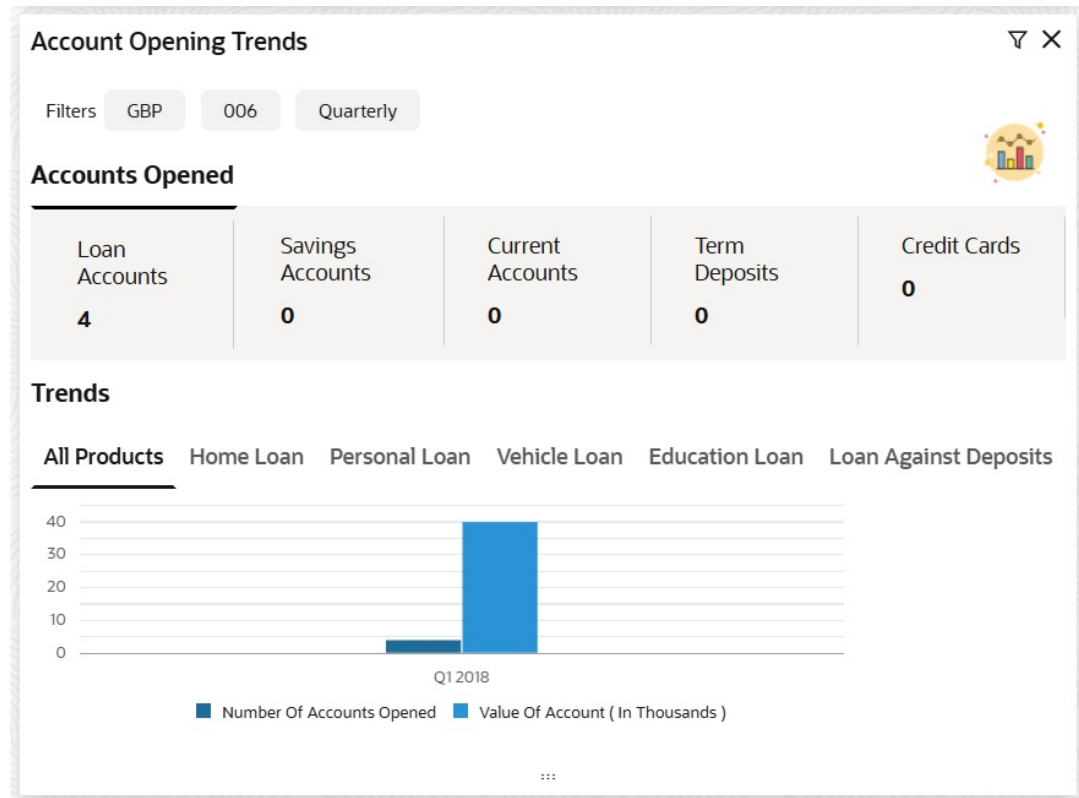
## 1.4 Account Opening Trend

This topic describes systematic instructions to view Account opening trend widget.

The Account Opening Trend widget allows logged-in bank users view the trend of accounts that the bank opened for each Product Type, such as Loan Accounts, Savings Accounts, Current Accounts, or Term Deposits Accounts for the specified period.

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

The **Account Opening Trend** widget displays in **Dashboard** screen.

**Figure 1-8 Account Opening Trends**

This widget displays the value of accounts (in thousands) compared to the number of accounts opened for all business product in Oracle Banking Originations Cloud Service.

2. Hover over the bar chart to view the below details in the pop-up.

- **Series**
- **Group**
- **Value**

3. Click  to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Period**

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

4. Click  icon to change the chart type.

## 1.5 Stage Wise Details

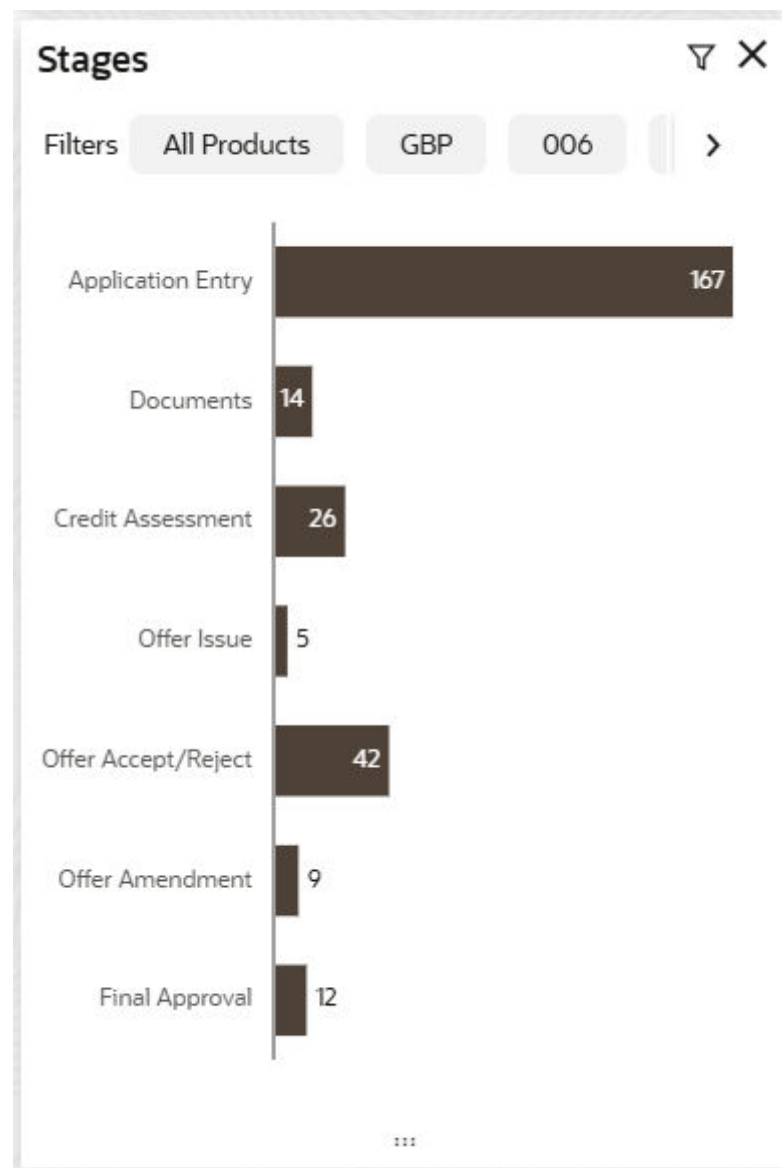
This topic describes systematic instructions to display Stage Wise Details widget.

The **Stage Wise Details** widget allows the logged-in user to view the stage-wise details of the business process for their branch.

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

The **Stages** widget displays on **Dashboard** screen.

**Figure 1-9 Stages**



Each horizontal bar represents the **Stage Group**.

2. Click a horizontal bar to represent a specific stage group

A pop-over displays an additional horizontal bar graph that shows the application count for each stage in that stage group.

For more information, refer to the stage description table below.

**Table 1-5 Application stage group and its stages**

| Stage Group                | Stages                                                                                                                                                                                                                                                                 |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Application Entry</b>   | <ul style="list-style-type: none"> <li>• Application Initiation</li> <li>• Application Entry</li> <li>• Application Enrichment</li> <li>• Overdraft Limit Details</li> <li>• Initial Funding</li> <li>• Debit Assessment</li> <li>• Manual Debit Assessment</li> </ul> |
| <b>Documents</b>           | Application Documents                                                                                                                                                                                                                                                  |
| <b>Credit Assessment</b>   | <ul style="list-style-type: none"> <li>• Underwriting</li> <li>• Assessment</li> <li>• Manual Credit Assessment</li> <li>• Manual Credit Decision</li> <li>• Account Parameter</li> <li>• Account Parameter Setup</li> <li>• Supervisor Approval</li> </ul>            |
| <b>Offer Issue</b>         | Offer Issue                                                                                                                                                                                                                                                            |
| <b>Offer Accept/Reject</b> | <ul style="list-style-type: none"> <li>• Customer Offer Accept/Reject</li> <li>• Offer Accept/Reject</li> </ul>                                                                                                                                                        |
| <b>Offer Amendment</b>     | Post Offer Amendment                                                                                                                                                                                                                                                   |
| <b>Final Approval</b>      | <ul style="list-style-type: none"> <li>• Account Approval</li> <li>• Handoff Retry</li> <li>• Open Account</li> </ul>                                                                                                                                                  |
| <b>Account Funding</b>     | Account Funding                                                                                                                                                                                                                                                        |

3. Hover over a horizontal bar for a specific stage to displays the following details.

- **Phase Name**
- **Total Applications**



4. Click to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Products**
- **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. On selecting a product, the widget refreshes and fetches the values for the selected product type.

## 1.6 Loan Offer Status

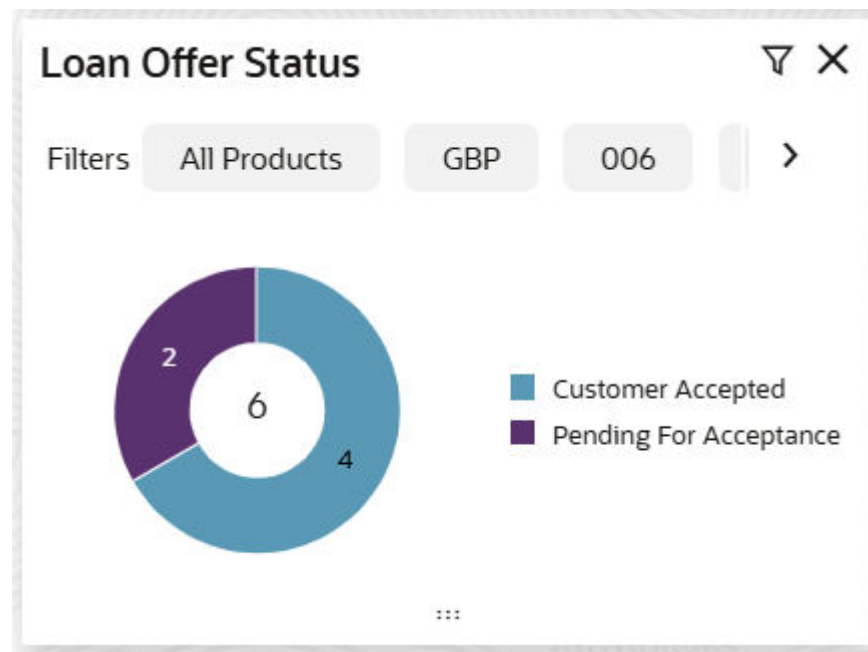
This topic describes systematic instructions to view Loan Offer Status widget.

The **Loan Offer Status** widget allows the logged-in 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.

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

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

**Figure 1-10** Loan Offer



In the pie chart reveals the numbers and the value of the loan offers for the below mentioned status:

- **Bank Reject**
  - **Customer Accepted**
  - **Customer Rejected**
  - **Pending for Acceptance**
2. Hover on a pie chart split for the specific status.

The popup displays the details below:

- **Status**
- **Total Applications**
- **Total Value**

3. Click  to filter the data.

The available options are:



- **Currency**
- **Branch**
- **Sub-Products**
- **Period**
- **Select Month**

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

4. Click on hyper-linked number, to redirect to the **All Applications** screen.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-11 All Applications - Loan offer status**

| Application Number | Application Date             | Product Type | Business Product Name      | Customer Name      | CIF Number | Status            | Offer Issue Date | Mobile     | Email             |
|--------------------|------------------------------|--------------|----------------------------|--------------------|------------|-------------------|------------------|------------|-------------------|
| 006APPO00010047    | March 30, 2018 at 2:16:49 PM |              | Insta Delight Express Loan | Mrs. Donna M Wills | 000008645  | Customer Accepted |                  | 1893455667 | krishnadas.r.pai@ |

Page 1 of 1 (1 - 1 of 1 Items) | < < 1 > > |

Close

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

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

| Field                        | Description                                |
|------------------------------|--------------------------------------------|
| <b>Application Number</b>    | Displays the application reference number. |
| <b>Application Date</b>      | Displays the application date.             |
| <b>Product Type</b>          | Displays the type of product.              |
| <b>Business Product Name</b> | Displays the name of the business product. |
| <b>Customer Name</b>         | Displays the customer name.                |
| <b>CIF Number</b>            | Displays the CIF number.                   |
| <b>Status</b>                | Displays the status of the application.    |
| <b>Offer Issue Date</b>      | Displays the offer issue date.             |
| <b>Mobile</b>                | Displays the mobile number.                |
| <b>Email</b>                 | Displays the e-mail ID.                    |

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

## 1.7 Loan Exposure to Collateral

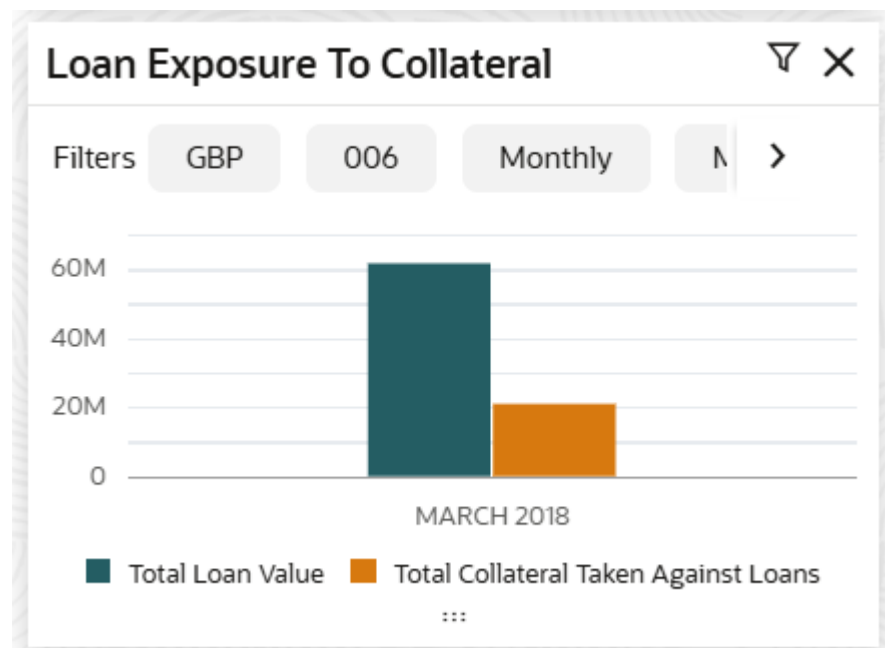
This topic describes systematic instructions to view Loan Exposure to Collateral widget.

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

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

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

**Figure 1-12** Loan Exposure to Collateral



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

2. Hover on the bar chart to display the below details on hover pop-up.

- **Series**
- **Group**
- **Value**

3. Click  to filter the data.

The available options are:

- **Currency**
- **Branch**
- **Sub-Products**
- **Period**
- **Select Month**

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

## 1.8 Applications Nearing Expiration

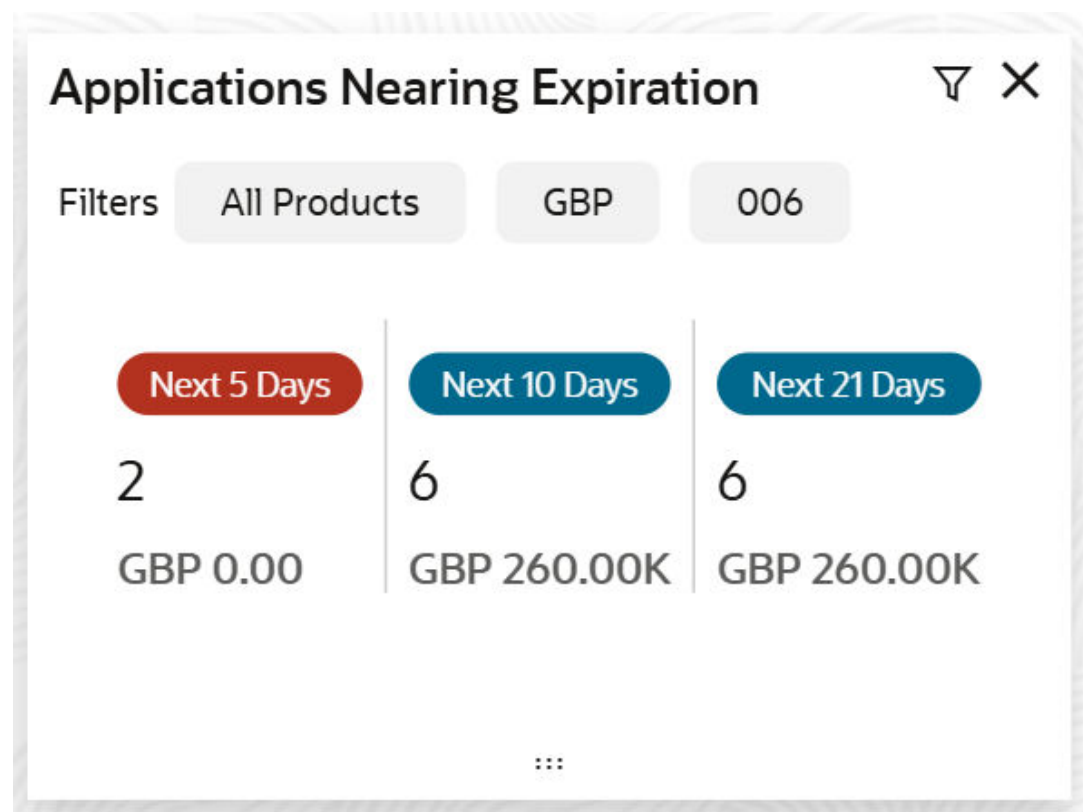
This topic describes systematic instructions to view Applications Nearing Expiration widget.

The **Applications Nearing Expiration** widget allows the logged-in bank user to view the details of applications which are nearing to expiry date.

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

The **Applications Nearing Expiration** widget displays in **Dashboard** screen.

**Figure 1-13 Applications Nearing Expiration**



2. Click  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.

- Click on hyper-linked number, to redirect to the **All Applications** screen.

The **All Applications** screen displays a drill-down view that shows the list of applications.

**Figure 1-14 All Applications - Application Nearing Expiration**

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

**Table 1-7 All Applications – Field Description**

| Field                          | Description                                            |
|--------------------------------|--------------------------------------------------------|
| <b>Application Number</b>      | Displays the application reference number.             |
| <b>Application Date</b>        | Displays the application date.                         |
| <b>Product Type</b>            | Displays the type of product.                          |
| <b>Business Product Name</b>   | Displays the name of the business product.             |
| <b>Customer Name</b>           | Displays the customer name.                            |
| <b>CIF Number</b>              | Displays the CIF number.                               |
| <b>Status</b>                  | Displays the status of the application.                |
| <b>Application Expiry Date</b> | Displays the application expiry date.                  |
| <b>Days To Expire</b>          | Displays the number of days to expire the application. |
| <b>Mobile</b>                  | Displays the mobile number.                            |
| <b>Email</b>                   | Displays the e-mail ID.                                |

For more information about the **All Applications** screen, refer to the [My Applications](#) topic.

## 1.9 Loan Offers Nearing Expiration

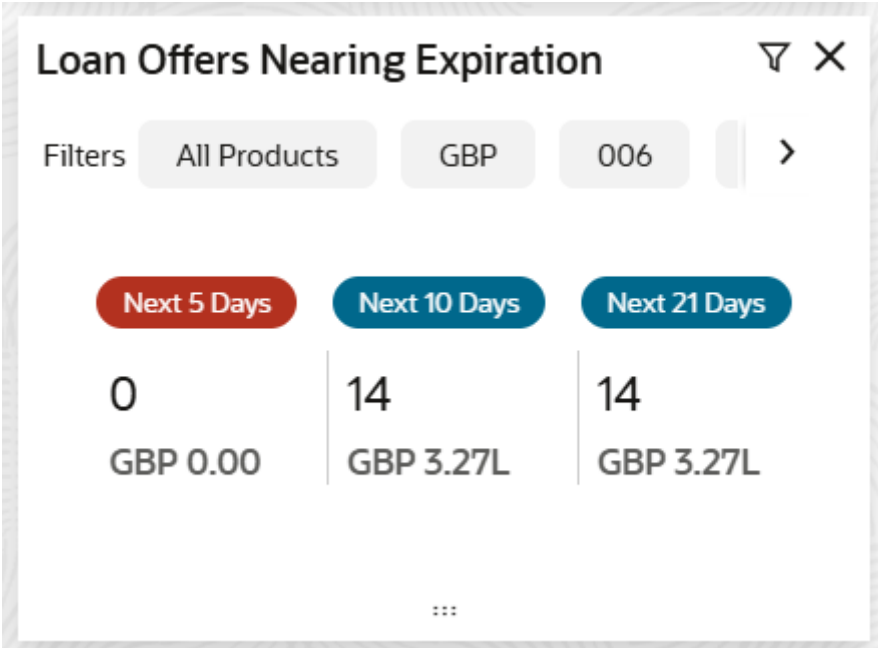
This topic describes systematic instructions to view Loan Offers Nearing Expiration widget.

The **Loan Offers Nearing Expiration** widget 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.

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

The **Loan Offers Nearing Expiration** widget displays in **Dashboard** screen.

Figure 1-15    Loan Offers Nearing Expiration



The value of widget displays based on filter parameter selected.

2. Click  to filter the data.

The available options are:

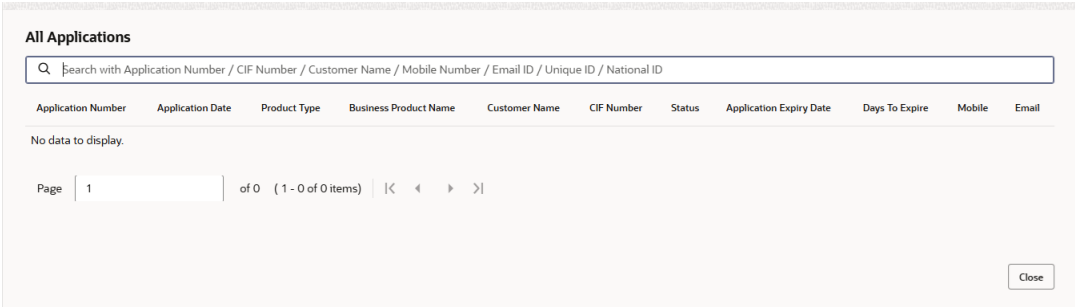
- **Currency**
- **Branch**
- **Users**
- **Sub-Products**

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 a drill-down view that shows the list of applications.

Figure 1-16    All Applications - Application Nearing Expiration



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

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

| Field                          | Description                                            |
|--------------------------------|--------------------------------------------------------|
| <b>Application Number</b>      | Displays the application reference number.             |
| <b>Application Date</b>        | Displays the application date.                         |
| <b>Product Type</b>            | Displays the type of product.                          |
| <b>Business Product Name</b>   | Displays the name of business product.                 |
| <b>Customer Name</b>           | Displays the customer name.                            |
| <b>CIF Number</b>              | Displays the CIF number.                               |
| <b>Status</b>                  | Displays the status of the application.                |
| <b>Offer Issue Date</b>        | Displays the offer issue date.                         |
| <b>Application Expiry Date</b> | Displays the application expiry date.                  |
| <b>Days To Expire</b>          | Displays the number of days to expire the application. |
| <b>Mobile</b>                  | Displays the mobile number.                            |
| <b>Email</b>                   | 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 widget.

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 (pie chart) as well as in tabular form.

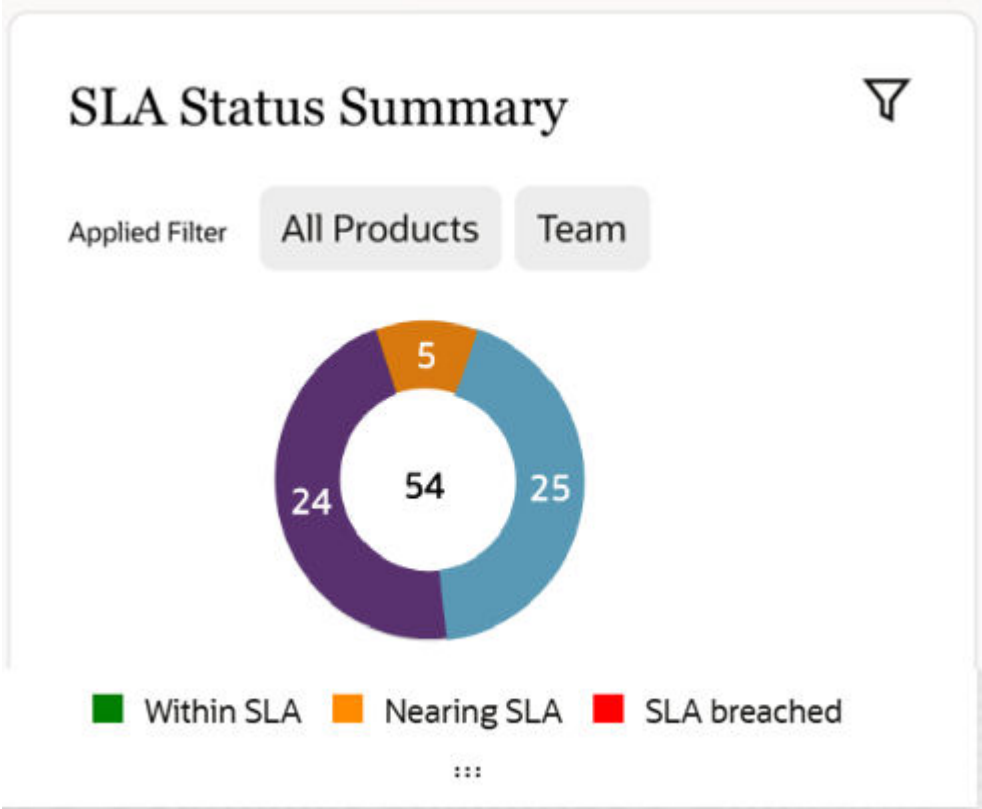
The SLA Status widget highlights the tasks that are **Within SLA** (in green), **Nearing SLA breach** (in amber) and **breached SLA** (in red)

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

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

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

Figure 1-17 SLA Status Summary - Graphical View



2. Click  to view the SLA status summary in Tabular view.  
The **SLA Status Summary - Tabular view** widget displays in **Dashboard** screen.

Figure 1-18 SLA Status Summary - Tabular View

SLA Status Summary

| Status                           | Process Reference Number | Branch | Process Name | Stage Name | Customer Id | Currency | amount |
|----------------------------------|--------------------------|--------|--------------|------------|-------------|----------|--------|
| No data to display.              |                          |        |              |            |             |          |        |
| Page 1 (0 of 0 items)  < < 1 > > |                          |        |              |            |             |          |        |

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

Table 1-9 SLA Status Summary – Field Description

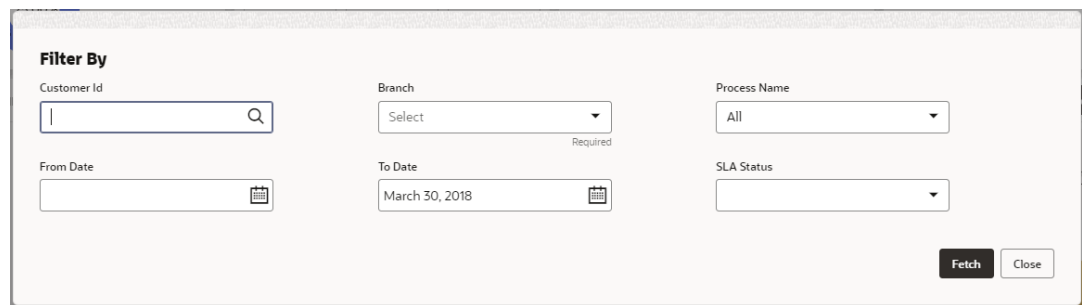
| Field                    | Description                            |
|--------------------------|----------------------------------------|
| Status                   | Displays the SLA Status.               |
| Process Reference Number | Displays the Process Reference Number. |
| Branch                   | Displays the Branch.                   |
| Process Name             | Displays the Process Name              |

Table 1-9 (Cont.) SLA Status Summary – Field Description

| Field       | Description               |
|-------------|---------------------------|
| Stage Name  | Displays the Stage Name.  |
| Customer ID | Displays the Customer Id. |
| Currency    | Displays the Currency.    |
| Amount      | Displays the Amount.      |

3. Click  to filter the data.  
The **Filter by** screen displays.

Figure 1-19 Filter By



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

Table 1-10 Filter By – Field Description

| Field        | Description                                                                                                                                                                                                        |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer ID  | Click <b>Search</b> 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.<br><b>Note:</b> By default branch date will be shown.                                                                                               |
| SLA Status   | Select the <b>SLA Status</b> from the drop-down list.<br>The available options are: <ul style="list-style-type: none"> <li>• <b>Within SLA</b></li> <li>• <b>Near Breach</b></li> <li>• <b>Breached</b></li> </ul> |



# 2

## Alerts

This topic provides information about alerts.

Oracle Banking Originations Cloud Service 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 Originations Cloud Service 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                           |

# Index

## A

---

Account Opening Trend, [11](#)  
Alerts, [1](#)  
Application Search, [9](#)  
Applications Nearing Expiration, [18](#)

## C

---

Conversion Analysis, [10](#)

## D

---

Dashboards, [1](#)

## E

---

Error Code and Messages, [A-1](#)

## F

---

Functional Activity Code, [B-1](#)

## L

---

Loan Exposure to Collateral, [17](#)  
Loan Offer Status, [15](#)  
Loan Offers Nearing Expiration, [19](#)

## M

---

My Applications, [2](#)

## S

---

SLA Status Summary, [21](#)  
Stage Wise Loan Details, [13](#)