Oracle® Banking Virtual Account Management Oracle Banking Getting Started User Guide





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Preface

- Purpose
- Audience
- List of Topics

Purpose

This guide helps to get started with Oracle Banking applications. It explains the basic design of Oracle and the common operations that 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 the new products in the bank.

List of Topics

This guide is organized as follows:

Table 1 List of Topics

Topics	Description
Access Application	This topic provides the information about the installation of different kinds of services.
Application Environment	This topic provides the information about the different types of screen environment.
How to's	This topic provides the information about how to access the screens.
Screen / Dashboard	This topic provides the information about the Screens / Dashboard.
Common Fields	This topic provides the information about the common fields.
Common Buttons	This topic provides the information about the common buttons.



1

Access Application

The user can access any application using the link provided by the administrator. Please contact the administrator for URL and the login credentials.

For more information on Users and Roles, refer to *Oracle Banking Security Management System User Guide*.

- Sign In
 This topic provides the systematic instructions to sign in to the application.
- Sign Out
 This topic provides the systematic instructions to log out from the application.

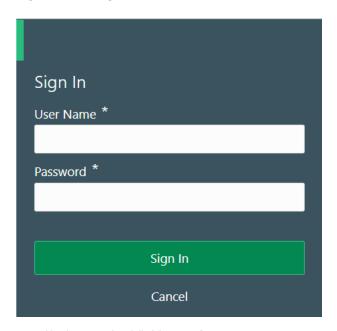
1.1 Sign In

This topic provides the systematic instructions to sign in to the application.

Make sure that the valid user name and password is created for the user.

Specify the URL in the browser address and press Enter.
 The Sign In screen displays.

Figure 1-1 Sign In



2. Specify the required fields on **Sign In** screen.

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

Table 1-1 Sign In - Field Description

Field	Description
User Name	Specify the user name provided by the administrator.
Password	Specify the password provided by the administrator.

3. Click **Sign In** to login to the application.

The **Home** screen displays.

1.2 Sign Out

This topic provides the systematic instructions to log out from the application.

Make sure that all the fields are entered and saved.

- 1. In the selected application, navigate to toolbar.
- 2. From toolbar, click on the user name logged into the application.

The User Profile fly-out screen displays.

Figure 1-2 User Profile



3. Click **Log out** to sign out from the application.

The application logs out.



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.

Figure 2-1 Application Environment

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

Table 2-1 Application Environment – Field Description

Field	Description
Hamburger Menu	Click to expand/collapse the menu.
Menu	Click to navigate/open the screens associated with the application.
Sub-Menu	Click to navigate/open the screens associated with the application. These screens are associated with the menu depending on the user privileges.
Display Grid	Displays the screens/dashboards.

Table 2-1 (Cont.) Application Environment – Field Description

Field	Description	
Bank Name	Displays the name of the bank and its branch code. Click to select the branches associated with the logged in user.	
	Note: Depending on the logged in user and the branches associated, the user can switch between branches and view the records.	
Application Date	Displays the last performed application date of branch's EOD.	
User Profile	Displays the user profile related options and actions.	

Screen Environment

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

2.1 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.

Maintenance Screen

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

Summary Screen

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

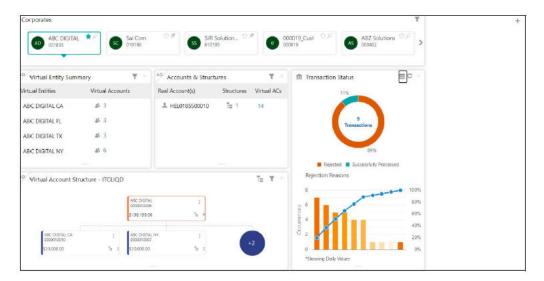
2.1.1 Dashboard

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.



Figure 2-2 Dashboard

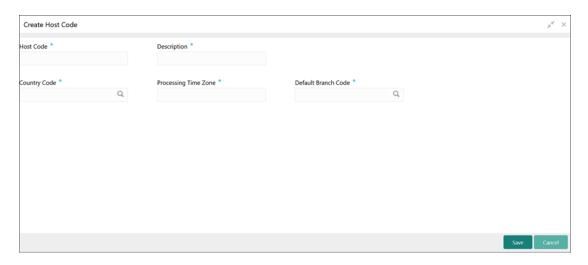


2.1.2 Maintenance Screen

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 2-3 Maintenance Screen



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



Table 2-2 Maintenance Screen – Field Description

Field	Description
Fields	Displays the fields associated with the selected create screen.
	There are several types of fields such as text box, drop-down, and so on. These fields are either mandatory or options fields.
	For more information, refer to Mandatory and Optional Fields.
Tile bar	Displays the name of the screen, minimize, and remove actions.
	For more information, refer to Minimizing Records and Closing Records .
Save	Click to save the entered details.
Cancel	Click to cancel the entered details.

2.1.3 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 2-4 Summary Screen

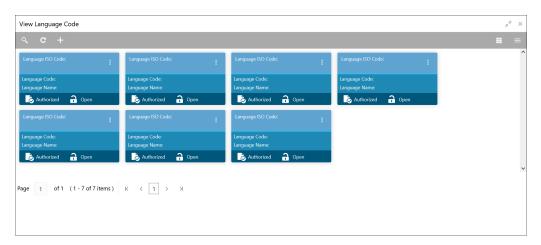


Table 2-3 Summary Screen – Field Description

Field	Description
Search	Click to search/view a record.
Refresh	Click to refresh all configured records.
Add	Click to create/configure a new record.
Pagination	Displays the number of items available and its page numbers.



Table 2-3 (Cont.) Summary Screen – Field Description

Field	Description
Title bar	Displays the name of the screen, minimize, and remove actions. For more information, refer to Minimizing Records and Closing Records .
Records	Displays the configured records. The user can view the records in different format. For more information, refer to Viewing Records .
Tile view	Displays the configured records in the tile format.
List view	Displays the configured records in the list format.



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.

• Create / Configure 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.

3.1 Access the Records

This topic provides the systematic instructions to access the records.

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

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

1. Navigate to the hamburger menu.

By default, the hamburger menu is expanded.

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.

3.2 View the Records

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

The user can view the summary of all configured records in the selected summary screen. This helps you to find the required record faster.

The various formats to view the records are as follows:

Tile View

This topic describes about viewing the records in tile view.

Tile View with Context Menu

This topic describes about viewing the records in tile view with context menu.

List View

This topic describes about viewing the records in list view.

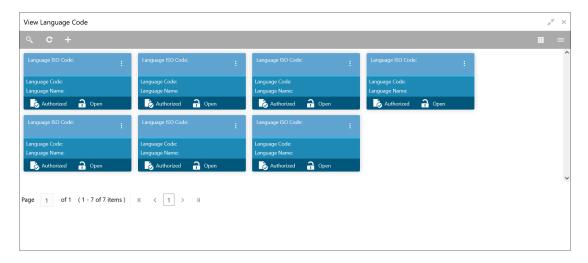
3.2.1 Tile View

This topic describes about viewing the records in tile view.

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



Figure 3-1 Tile View



3.2.2 Tile View with Context Menu

This topic describes about viewing the records in tile view with context menu.

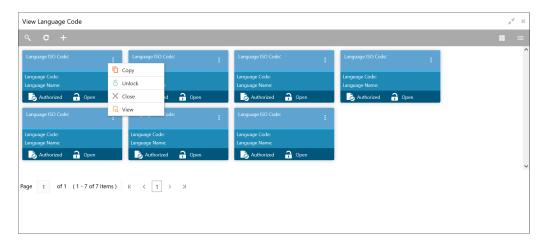
Tile view with context menu is similar to any tile view summary record. The context menu allows the user to perform any actions that are associated with the records.

The content menu is available for:

- View Account Input
- View Account Closure
- View Account Product
- View Internal Credit Line
- View Line Account Linkage
- View Bank Parameters
- View Virtual Entity
- View Corporate Specific Account Number Range



Figure 3-2 Tile View with Context Menu



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

Table 3-1 Tile View with Context Menu - Field Description

Field	Description
Context Menu	This button appears only to a select the number of screens. The context menu allows the user to perform actions that are associated with the record.
Context Menu Flyout	A list of all actions appears. The list of actions depend on the status of the record.

3.2.3 List View

This topic describes about viewing the records in list view.

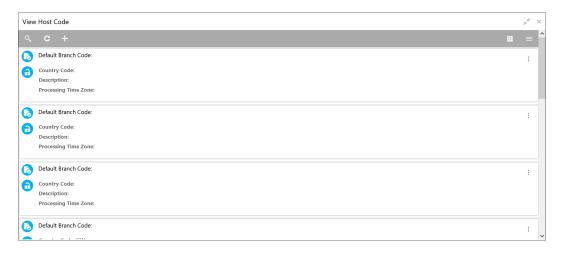
The **List View** displays the configured records in a list format.

- **1.** Navigate to **View** screen.
- 2. Click **List View** on the action toolbar to view the details.

The **List View** screen displays with the details.



Figure 3-3 List View



3.3 Search the Records

This topic provides the systematic instructions to search the records.

- Navigate to View screen.
- 2. Click **Search** button.

The fields associated with the screen displays.

Figure 3-4 Search



- 3. Specify the required fields.
- 4. Click Search.

The requested record displays.

3.4 Refresh the Records

This topic provides the systematic instructions to refresh the records.

- 1. Navigate to View screen.
- 2. Click Refresh button.

The records associated with the screen is updated with the latest details.

3.5 Create / Configure the Records

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

The user can create / configure records in any of the three ways:



- 1. In the selected **View** screen, click **Add** to create / configure a record.
- In the selected View screen, click on a configured record and click New to create / configure a record.
- 3. On the menu, select a sub-menu and click < Create name of the screen>.

3.6 Copy the Records

This topic provides the systematic instructions to copy the record.

- 1. Navigate to View screen.
- 2. Click the record that need to copy.
- Click Copy to copy the selected record details and do the required changes to the record.
- 4. Click Save.

The modified record is saved.

3.7 Unlock the Records

This topic provides the systematic instructions to unlock the record.

- 1. Navigate to View screen.
- 2. Click the record that need to unlock.
- 3. Click **Unlock** to unlock the selected record details and do the required changes to the record.
- 4. Click Save.

The modified record is saved.

3.8 Reopen the Records

This topic provides the systematic instructions to reopen the record.

- 1. Navigate to **View** 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.



3.9 Delete the Records

This topic provides the systematic instructions to delete the record.



Make sure that the user have privileges and know the guidelines to delete the records.

- Navigate to View screen.
- 2. Click the record that needs to be deleted.
- 3. Click Delete.

The selected record is deleted.

3.10 Print the Records

This topic provides the systematic instructions to print the record.

- 1. Navigate to View screen.
- 2. Click the record that needs to be printed.
- 3. Click **Print** to view the record in a print format.

The selected record is printed.

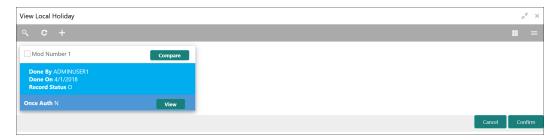
3.11 Authorize the Records

This topic provides the systematic instructions to authorize the record.

- 1. Navigate to View screen.
- 2. Click the record that needs to be authorized.
- 3. Click Authorize.

The authorized records associated with the screen displays.

Figure 3-5 Authorize



- Select the required record that must be authorized.
- Click Approve to authorize the record.



3.12 Minimize and Maximize the Records

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

- 1. Navigate to View screen.
- 2. Click Collapse to minimize the screen.

The minimized screen diplays at the bottom left corner of the screen.

3. Click **Maximize** button to maximize the screen.

The screen is maximized.

3.13 Close the Records

This topic provides the systematic instructions to close the record.

- 1. Navigate to View screen.
- Click Remove button to close the record.

The selected record is closed.



If the user is in the middle of creating/modifying the records, an error/warning message appears prompting to save the changes.

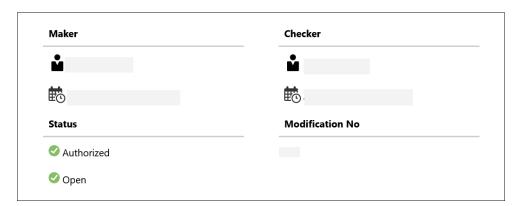
3.14 Audit the Records

This topic provides the systematic instructions to audit the record.

- Navigate to View screen.
- 2. Click **Audit** to view the change history of the record.

The Audit detail popup screen displays.

Figure 3-6 Audit





3. Click anywhere the screen to close the audit detail popup screen.



4

Screen / Dashboard

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

Pagination

This topic describes about the pagination details in the screen.

Mandatory and Optional Fields

This topic describes about the mandatory and optional fields in the screen.

Configure Tile

This topic describes the systematic instructions to configure the dashboard tile.

Remove Tile

This topic describes the systematic instructions to remove the dashboard tile.

Reorder Tile

This topic describes the systematic instructions to reorder the dashboard tile.

Expand Tile

This topic describes the systematic instructions to expand the dashboard tile.

Add Tile

This topic describes the systematic instructions to add the dashboard tile.

4.1 Pagination

This topic describes about the pagination details in the screen.

The pagination displays the number of records on the bottom left corner of the selected view screen. The number of pages appears depending on the records available. The user can navigate to the first page, last page, previous page, or next page using the numbers options.

4.2 Mandatory and Optional Fields

This topic describes about the mandatory and optional fields in the screen.

There are mandatory and optional fields available for any screen. The user can identify the mandatory field with the asterisk (*) symbol. If the user tries 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.

4.3 Configure Tile

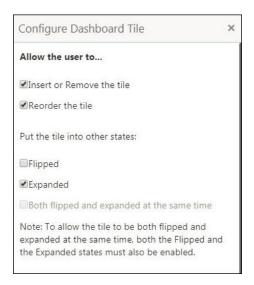
This topic describes the systematic instructions to configure the dashboard tile.

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

1. On the Dashboard screen, click Configure Tile.

The **Configure Dashboard Tile** pop-up screen displays.

Figure 4-1 Configure Dashboard Tile



2. On Configure Dashboard Tile screen, select the required options.

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

Table 4-1 Configure Dashboard Tile

Field	Description
Insert or Remove the tile	If selected, the user can remove the dashboard widget from the dashboard-landing page.
Reorder the tile	If selected, the user can rearrange the dashboard widget in the dashboard-landing page.
Flipped	If selected, the user can flip the dashboard widget for more information.
Expanded	If selected, the user can expand the dashboard widget in the dashboard landing page.
Both flipped and expanded at the same time	If selected, the user can flip and expand the dashboard widget in the dashboard landing page.

3. Click **Close** button to update the dashboard widget configuration.

4.4 Remove Tile

This topic describes the systematic instructions to remove the dashboard tile.

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

4.5 Reorder Tile

This topic describes the systematic instructions to reorder the dashboard tile.

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

4.6 Expand Tile

This topic describes the systematic instructions to expand the dashboard tile.

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

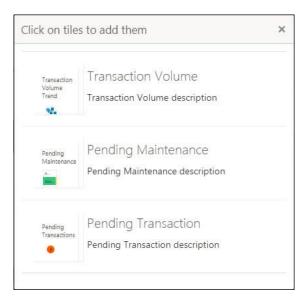
4.7 Add Tile

This topic describes the systematic instructions to add the dashboard tile.

 Click Add Tiles to Dashboard to add more available dashboard widget to the dashboard landing page.

The Click on tiles to add them screen displays.

Figure 4-2 Click on tiles to add them



2. Click on the dashboard that the user wants to add to the dashboard-landing page.

The page is automatically refreshed and displays the added dashboard widget.



5

Common Fields

This topic provides the information about all the common fields used in the application.

The list of common fields are as follows.

Table 5-1 Common Fields

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 Create External Customer 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 Create External Customer Account 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 Create Upload Source 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 Create Host Code 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 Create Currency Definition screen.	
Status	Displays the status of the record: • Authorized: The record is verified and authorized. • Unauthorized: The record is not verified. • Open: The record is open and waiting for verification. • Locked: The record is locked. • Closed: The record is closed.	



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 as follows.

Table 6-1 List of Buttons/Icons

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	Print view the configured record for the selected screen.	
Authorize	Authorize 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.	
<	Move back all the selected list of records to the available list of grid.	



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