Netbanking Components
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Adding screen shots/diagrams ................................................................................................. Error! Bookmark not defined.
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# Document History

<table>
<thead>
<tr>
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<th>Version</th>
<th>Date</th>
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<td>Simon</td>
<td>0</td>
<td>Undated</td>
</tr>
<tr>
<td>Sundar</td>
<td>0.1</td>
<td>June 2016</td>
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Comments:

This document gives a brief of all components developed by Simon Coppen for various Presales demos.
Introduction

This document gives a brief account of NETB developments.

NETB is a collection of utilities, Key developments and other nice lists all the T24 related utilities as well as nice to demo features in T24 as well as Temenos Connect.

Contents

Please refer to the NETB package.
Netbank Configuration

Package Contents

The Netbank configuration package is neatly categorized into different components as per where they need to be installed/configured

- Jboss
- NET.BP
  - netb.jar
  - NETB.UPD.20160801.1.txt
  - NETB.UPD.20160801.2.txt
  - NETB.UPD.20160801.3.txt
  - NetbExternal.war
  - NetbInternal.war
  - NetbService.war
  - TMNS000-NETB.UPD.20160801.1.7z
  - TMNS000-NETB.UPD.20160801.2.7z
  - TMNS000-NETB.UPD.20160801.3.7z

The package contains the configuration details for Jboss which includes the new queues and changes to standalone

- standalone
  - TAFJEE_EAR
  - TAFJEE_EAR.car

The NET.BP contains all utility routines, mostly input routines to versions and enquiry conversion routines. These are also compiled into the netb.jar
Netbank Components

Netbank Configuration

The Netbank configurations are contained in the TMNS000-NETB.UPD.20160801.1.7z and TMNS000-NETB.UPD.20160801.2.7z archives and the lists of applications and records are in the files NETB.UPD.20160801.1.txt and NETB.UPD.20160801.2.txt

The Netbank developments cover 4 main areas of core banking – process workflow, customer relationship management, interface and database configuration and web services

Some screens are similar to those available in the standard model bank, however subtle changes have been made based on personal preference, productivity and purpose

Other screens have been developed due to limited or non-existent coverage in the standard model bank

Process

The process workflow developments cover process definition and process monitoring

Process definition screens have been provided in the standard model bank, however there is very limited functionality in relation to process monitoring, which is a requirement when demonstrating or testing process workflows

Overview – process / activity monitoring and management
Service – services management screens
Design – screens for process workflow definitions
Overview – process / activity monitoring and management

The process monitor (overview) screen provides 3 main tabs (pending, complete and manage)

The pending and complete tab screens are identical except that pending displays active / pending processes and complete displays completed processes

Within the pending and completed tabs there are 2 initial sections

1 – Process items (sorted by descending date-time)
2 – Workspace
Pending / Completed

Selecting the details drilldown replaces the workspace with additional process and activity information

1 – Process items (sorted by descending date-time)

2 – Activity progress or map, this enquiry details defined activities from the process definition and indicates activities that are currently active / pending and those that are completed

Note that not all defined activities will necessarily be used during process execution

3 – Activity details, this enquiry display the activities that are active / pending or completed

The drilldown on this enquiry provides additional details on the process, the activity and provides option to execute the selected activity

The duration tab provides time tracking information, e.g. start time, end time and duration

4 – In all cases, the drilldown selection from the activity details enquiry will be displayed in the bottom section of the screen
Manage

The manage tab provides graphical and report based analysis information to help manage the processes and activities across the system.

Using the Process tab

1 – Pie and bar graphs displaying the allocation of processes across participant groups.

2 – Report displaying the allocation of processes across participant groups with alert on overload.
   Selecting the drilldown displays report of processes allocated to the participant group in workspace.

3 – Report of active processes for the selected participant group.
   Selecting the drilldown navigates to the process details screen as documented previously.
Using the Activity tab

1 – Pie and bar graphs displaying the allocation of activities across account officer groups

2 – Report displaying the allocation of activities across account officer groups, with alert on overload
   Selecting the drilldown displays report of activities allocated to the account officer group in the workspace

3 – Report of active activities for the selected account officer group
   Selecting the drilldown navigates to the process details screen as documented previously
Service – agent / services management screens

Standard model bank services management screen, added to process workflow menu for easy access
Design – screens for process workflow definitions

The process design screen provides functionality for the creation and maintenance of process workflow definitions.

The screen is divided into 4 sections and designed to simplify the tasks required:

1. Process definition pane, fields arranged horizontally, simplifying the reading of the flow
2. Activity definition
3. Enquiry pane, options to search and view records from all related applications
4. Version pane, options to create new and amend existing records from all related applications

The remaining menu items are versions for the different applications required or possibly used when creating process workflows and require no further explanation.
Opportunity

For the purposes of this document’s references to ‘Opportunity’ with include inbound (opportunity) and outbound (campaign) opportunity definitions.

Design
- Overview – opportunity monitoring and management
- Rule Context – create and maintain rule contexts for the rules engine
- Rule Engine Client – execute rules engine rules against the database

Manage
Existing versions necessary to maintain opportunities

Overview – opportunity design and monitoring

The opportunity design and monitor (overview) screen provides 2 main tabs (designer and monitor).

Within the designer tabs there are 2 initial sections

1 – Opportunity definitions as defined in the opportunity definition application
2 – Review – report on product coverage across all the available opportunity definitions
Selecting the drilldown of the opportunity definition display the opportunity definition and related details in the workspace pane at the bottom of the page.

The opportunity definition parameters are arranged across the first 2 tabs (details and process) and the related image and advice details on the following tabs, the last tab (update) provides screens to maintain the selected definition and related image records.
Opportunity image reference details and linked image (bug to be fixed)

Opportunity advice reference details and linked advice (bug to be fixed)
Update opportunity record details

Update image and advise reference details
Monitor

Opportunity monitor is designed to display information on which opportunities have been created for the selected opportunity definitions, how many, what status and provide links to the active process workflows for the active opportunities.

Within the monitor tab there are 2 initial sections:

1 – Opportunity definitions as defined in the opportunity definition application
2 – Opportunities – reports on opportunities and their various statuses
Opportunities created but not yet communicated

Opportunities for the selected opportunity definition and with a status of accepted

Linked process workflow details and a drilldown, selecting the drilldown navigates to the process details screen as documented in a previous chapter
## Opportunities for the selected opportunity definition and with a status of pending

<table>
<thead>
<tr>
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<th>Direction</th>
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### Status View

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<th>Reject</th>
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</table>

## Opportunities for the selected opportunity definition and with a status of rejected

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<tr>
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<td>Personal Loan</td>
<td>Inbound</td>
</tr>
</tbody>
</table>
Netbank Components

Rule Context
Standard version for maintaining rule contexts used with the rules engine

Rule Engine Client
Standard enquiry for testing rules engine rules against the database
Results displayed based on rule and selection criteria (issue, records not selected, to be fixed)
Netbank Components

Interface

The interface developments cover creation and maintenance of applications related to the original browser user interface, prior to the use of Design Studio.

Standard model bank screens exist for all of these applications, however these additional screens offer alternative field and tab layouts that may be more efficient and productive to use than the standard screens.

- Enquiry – create and maintain enquiries
- Screen – create and maintain versions
- Workspace – create and maintain composite screens
- Tabspace – create and maintain tabbed screens
- Menu – create and maintain menus
Enquiry

The enquiry configuration screens are arranged in 8 tabs, assisting in the parameterisation of enquiries and designed in a horizontal format for the multi value parameters.

Standard, covers most common field level parameters

Complex, covers field positions and less common field level parameters
Selection, fixed and variable selection criteria parameters

Drilldown tab covers applicable parameters
Others tab covers page sizing and screen management parameters

Tools covers toolbars and other less common parameters
Service covers the parameters used to populate the process activity used for web services
Screen

The version configuration screens are arranged in 8 tabs, assisting in the parameterisation of enquiries and designed in a horizontal format for the multi value parameters.

Standard, covers most common field level parameters

Complex, covers more complex and less common field level parameters
Field default covers auto defaulting parameters

Field control covers field level parameters and validation controls
Screen control covers screen parameters and control parameters

Header parameters
Deal slip parameters
Workspace

The composite screen configuration screen arranges the multi value field parameters in the horizontal format to simplify input and maintenance.

Standard, covers the non-audit and inutable parameters.

Tabspace

The tabbed screen configuration screen arranges the multi value field parameters in the horizontal format to simplify input and maintenance.

Standard, covers the non-audit and inutable parameters.
Menu
The menu configuration screen arranges the multi value field parameters in the horizontal format to simplify input and maintenance.
Standard, covers the non-audit and inputtable parameters
Netbank Components

Database

The database developments cover creation and maintenance of applications related to local application and local reference fields.

Standard model bank screens exist for these applications, however these additional screens offer alternative field and tab layouts that may be more efficient and productive to use than the standard screens.

File – screen for the eb table definition application
Field – screens for local table and local ref table applications

File

The eb table definition configuration screens arranges the multi value field parameters in the horizontal format to simplify input and maintenance.

Standard, covers most common field level parameters.
Netbank Components

Complex, covers more complex and less common field level parameters

Vetting, covers the various field vetting options and parameters
Field
The local table and local reference table configuration screens arrange the multi-value field parameters in the horizontal format to simplify input and maintenance.

Standard, covers most common field level parameters.

Vetting, covers the various field vetting options and parameters.
Webservice

The web service developments cover creation and maintenance of applications related to web services. Screens (version) and queries (enquiry) created for use as web services (data only) require less parameters and therefore these designers only provide access to the required parameters.

Design – screen creating and maintaining web services applications
Query – list of netb queries available in the netb service
Create – list of netb create (input F3) screens in the netb service
Update – list of netb update (input) screens in the netb service

Design

The web services design screen provides functionality for the creation and maintenance of web services applications.

The screen is divided into 6 sections and designed to simplify the tasks required:

1. Process activity enquiry, listing activities with prefix (WS) as defined for web services
2. Service enquiry, listing services from the eb services application
3. Process activity input screen with parameters for web services, description and target
4. Service input screen
5. Enquiry input screen with parameters for web services
6. Version input screen with parameter for web services
Enquiry designer for web service

The enquiry designer has been developed to facilitate the creation of enquiries for web services. In order to assist, there is a validate routine that will auto-populate some of the parameters. Parameters populated are field label, column number, and operation, based on the field name.

For non-display fields where neither field label or column number are required, entering 0 in the column label will ignore population of field label or column number.

Note: when committing the record the validate routine will run so include all 0’s on commit.
Screen designer for web service

The screen web designer has been developed to facilitate the creation of screens for web services. In order to assist there is a validate routine that will auto populate some of the parameters. Parameters populated are column number, text character max and text, based on the field no / name.
Netbank Data

The Netbank data is contained in the TMNS000-NETB.UPD.20160801.3.7z archive and the list of applications and records is in the file NETB.UPD.20160801.3.txt

Data Description

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<td>100003</td>
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Image Management

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## Netbank Components

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<td>100001.0008300.02</td>
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<td>100001.0008300.01</td>
<td>Long Term Deposit USD AA16113B9M4G AAACT16113WJ6F9KLG</td>
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### Teller

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41  Business Solutions Group
Funds Transfer

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FT161137R3KP  ACIB  10000017  1,000.00

Eb Alert Request

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**Netbank Components**

### Eb Secure Message

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<td>SM0100100003</td>
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</tr>
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<td>SM0100100005</td>
<td>Oscar Wolf</td>
<td>Important information about compensation</td>
<td>SM0100100005</td>
</tr>
<tr>
<td>SM0100100006</td>
<td>Oscar Wolf</td>
<td>Important changes to Mobile Banking</td>
<td>SM0100100006</td>
</tr>
<tr>
<td>SM0100100007</td>
<td>Oscar Wolf</td>
<td>Your Annual Summary</td>
<td>SM0100100007</td>
</tr>
<tr>
<td>SM0100100008</td>
<td>Customer Agent</td>
<td>Internet Banking Access</td>
<td>SM0100100001</td>
</tr>
<tr>
<td>SM0100100009</td>
<td>Customer Agent</td>
<td>Great Service</td>
<td>SM0100100002</td>
</tr>
<tr>
<td>SM0100100010</td>
<td>Customer Agent</td>
<td>Question on Online Bonus Saver Product</td>
<td>SM0100100003</td>
</tr>
</tbody>
</table>

### Cr Customer Intelligence

<table>
<thead>
<tr>
<th>Message ID</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>100001</td>
<td>Oscar Wolf</td>
</tr>
<tr>
<td>100002</td>
<td>Amber Wolf</td>
</tr>
</tbody>
</table>

### Cr Contact Log

<table>
<thead>
<tr>
<th>Message ID</th>
<th>From</th>
<th>Type</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>CR0100100001</td>
<td>100001</td>
<td>In Person</td>
<td>Prospect requests meeting</td>
</tr>
<tr>
<td>CR0100100002</td>
<td>100001</td>
<td>Call Centre</td>
<td>Meeting confirmation</td>
</tr>
<tr>
<td>CR0100100003</td>
<td>100001</td>
<td>Meeting</td>
<td>Prospect meeting</td>
</tr>
<tr>
<td>CR0100100004</td>
<td>100001</td>
<td>Meeting</td>
<td>Prospect on boarding</td>
</tr>
<tr>
<td>CR0100100005</td>
<td>100001</td>
<td>Email</td>
<td>Welcome to Temenos Bank</td>
</tr>
<tr>
<td>CR0100100006</td>
<td>100001</td>
<td>Email</td>
<td>Welcome to Internet Banking</td>
</tr>
<tr>
<td>CR0100100007</td>
<td>100001</td>
<td>Email</td>
<td>Welcome to Online Bonus Saver</td>
</tr>
<tr>
<td>CR0100100008</td>
<td>100001</td>
<td>Email</td>
<td>Annual Summary</td>
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</tbody>
</table>

### Cr Opportunity

<table>
<thead>
<tr>
<th>Message ID</th>
<th>Product</th>
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</thead>
<tbody>
<tr>
<td>CROP0100100001</td>
<td>NETB.ACCOUNTCURRENT</td>
</tr>
<tr>
<td>CROP0100100002</td>
<td>NETB.ACCOUNTSAVING</td>
</tr>
<tr>
<td>CROP0100100003</td>
<td>NETB.DEPOSITSHORT</td>
</tr>
<tr>
<td>CROP0100100004</td>
<td>NETB.LOANPERSONAL</td>
</tr>
</tbody>
</table>
Netbank Components

100002
CROP0100200001 NETB.ACCOUNTCURRENT
CROP0100200002 NETB.ACCOUNTSAVING
CROP0100200003 NETB.DEPOSITSHORT
CROP0100200004 NETB.LOANPERSONAL

Beneficiary

Utility
BEN0100000001 Sky TV Entertainment
BEN0100000002 EDF Energy Energy Suppliers
BEN0100000003 Thames Water Water Suppliers

Customer
BEN01000001001 British Gas 100001
BEN01000001002 Vodafone 100001
BEN01000001003 Sky Sports and Movies 100001 BEN0100000001
BEN01000001004 EDF Electricity Bill 100001 BEN0100000002
BEN01000001005 Thames Water Bill 100001 BEN0100000003

Cr Opportunity Definition
NETB.ACCOUNTCURRENT Netb Account Current CURRENT.ACCOUNT
NETB.ACCOUNTSAVING Netb Account Saving SAVINGS.ACCOUNT
NETB.DEPOSITSHORT Netb Deposit Short DEPOSIT.SHORT
NETB.LOANPERSONAL Netb Loan Personal PERSONAL.LOAN

Standing Order

100001
10000017.1 Current Account Fixed Clearing Transfer British Gas
10000017.2 Current Account Fixed Clearing Transfer Vodafone

Direct Debit

100001
10000017.1 Current Account Sky Television New Events
10000017.2 Current Account Council Tax New Events
Netbank Components

Cheque Issue

100001
CURR.10000017.0000001 New 50 USD

Eb External User

100001
OSCARWOLF Oscar Wolf 100001 Personal

Channel Permission

100001
100001-DEFAULT Oscar Wolf Default INDIVIDUAL 100001

Aa Arrangement

100001
AA1611386NZZ 100001 Temenos Connect Retail TCIB Personal Internet Banking
### Netbank Components

#### Arrangement Overview - Deposits

<table>
<thead>
<tr>
<th>Arrangement</th>
<th>Account</th>
<th>Commitment Amount</th>
<th>Status</th>
<th>Interest Type</th>
<th>Commitment Date</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA161338MAC</td>
<td>10000041</td>
<td>10,000.00</td>
<td>Current</td>
<td>Single</td>
<td>22 APR 2016</td>
<td>22 APR 2016</td>
</tr>
</tbody>
</table>

#### Account Details

- **Account Details**
  - **Type:** Current
  - **Status:** Current
  - **Account Dates:**
    - **Start Date:** 22 APR 2016
    - **End Date:** 22 APR 2016
  - **Commitment:** 10,000.00 USD
  - **Total Principal:** 10,000.00

#### Additional Details

- **Activity Log**
  - **Activity:** New Activity for Arrangement
  - **Tin:** 10,000.00 USD

### Arrangement Overview - Lending

<table>
<thead>
<tr>
<th>Arrangement</th>
<th>Account</th>
<th>Commitment Amount</th>
<th>Status</th>
<th>Interest Type</th>
<th>Commitment Date</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA1613318F1</td>
<td>10000097</td>
<td>25,000.00</td>
<td>Current</td>
<td>Single</td>
<td>22 APR 2016</td>
<td>22 APR 2016</td>
</tr>
</tbody>
</table>

#### Account Details

- **Account Details**
  - **Type:** Personal Loan
  - **Status:** Current
  - **Account Dates:**
    - **Start Date:** 22 APR 2016
    - **End Date:** 22 APR 2016
  - **Commitment:** 25,000.00
  - **Total Principal:** 25,000.00

#### Additional Details

- **Activity Log**
  - **Activity:** New Arrangement
  - **Tin:** 25,000.00 USD

---

**Note:** The images depict a user interface for financial transaction management, showcasing the details of deposits and lending arrangements along with their respective account and commitment information.
100003 Sophie Wolf

Netbank Components

Sophie Wolf

Credit Cards

Deposits

10000092 USD - Savings Account Overview

Facilities and Conditions

Create Now

Additional Details
Image Type Changes