SOP

Shikhar user creation / modification

Table of Contents

Application User Creation	3
ID creation from Avatar/UAM	4
ID modification in Avatar/UAM	6
DSA ID creation for Shikhar Retail	8
DSA ID creation for Shikhar Agri	10
DSA ID creation for Shikhar SBB	10
ID creation for Shikhar AgriLOS (Online Documentation Portal)	10

User management is to be done via Avatar/UAM. DSA role to be created via Unidesk ticket that would be addressed by individual product teams in Shikhar.

Application User Creation

In Shikhar Application, two types of users can be created

- I) With role, other than DSA can be created from Avatar/UAM
- II) With role, DSA can be created from Unidesk

ID creation from Avatar/UAM

1) Shikhar ID creation is done from Avatar UAM portal, visit URL https://uam.axisb.com/

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- II) Go to Category and select Shikhar. Request can be raised for own or for others (others here refers to non-staff)
- III) Select respective service name as Shikhar / Shikhar Agri / Shikhar SBB

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 After selecting service name, more fields will be displayed (as shown in below screenshot) which needs to be filled

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- v) Provide valid business justification that why is this user ID creation required
- vi) Select required fields like role, product, zone, region, CPC, ASC and cell
- vii) Click submit, and the request will go for approval with respective authorities. There is 2 level approval set, on both approval user ID gets created

ID modification in Avatar/UAM

1) If Shikhar ID is already created and needs to be modified then, go to URL <u>https://uam.axisb.com.</u> select Category as Shikhar and respective Service name as as Shikhar / Shikhar Agri / Shikhar SBB, user will see pop with respective message as screenshot below

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2. Click on proceed button and you will be able to see screen as below screenshot, click on icon highlighted below for your respective service.

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*	ACM Report	2	Shikhar Agri	Shikhar Agri	2024-09-25	2026-05-18	ACTIVE	Grant modified via AVTR23228259 on 26-09-2 024UPDATE via Request 23228259 on 26-09-2 024;	iii X ≗⁄ <mark>=</mark>
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									Previous 1 Next

3. On clicking of modify request data, user will see the screen as shown in below screenshot. Among the fields present users can choose to change them as per requirement with proper business justification. User ID will be modified on 2 level approvals received from respective approvers.

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DSA ID creation for Shikhar Retail-

- 1. Shikhar ID creation for non-AD/ ID users e.g. DSA is done from Unidesk portal, visit the URL https://unidesk.axisbank.com/
- 2. Select option User View

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3. Click on Submit request

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- 4. For Home Loan
- 1. In Service type select option RA Mortgages Sales Planning
- 2. In Category select option SHIKHAR

- 5. For Personal Loan
- 1) In Service type select option RA Personal Loan

2) In Category select option Shikhar_ PL

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6. In issues option, select your issue from the list mentioned in below screenshot

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View Requests		Agency mapping and branch mapping	RA Mortgages Sales Planning	SHIKHAR	
		Cell/CPC/ASC creation	RA Mortgages Sales Planning	SHIKHAR	
View FAQ		Customer Name change	RA Mortgages Sales Planning	SHIKHAR	
		Details update (Area, ASC, Cell Name, SM ID & SM Name)	RA Mortgages Sales Planning	SHIKHAR	
		DSA Configuration	RA Mortgages Sales Planning	SHIKHAR	
		Id Creation	RA Mortgages Sales Planning	SHIKHAR	~
		ID deactivation	RA Mortgages Sales Planning	SHIKHAR	
		ID Modification	RA Mortgages Sales Planning	SHIKHAR	
		ID Unlock/Reset	RA Mortgages Sales Planning	SHIKHAR	
		Local CPA mapped to one Cell & Case mapped to different Cell	RA Mortgages Sales Planning	SHIKHAR	
		MCLR & ROI different issues	RA Mortgages Sales Planning	SHIKHAR	
		Product Configuration	RA Mortgages Sales Planning	SHIKHAR	
				CUMULAR	*

7. Fill the required templates if applicable for the issue selected, mention Title and Description and click Submit, interaction will be raised

DSA ID creation for Shikhar Agri-

For Sale and CreditTeam EmpID, - please contact BPCS UPM Support (bpcsupmsupport@axisbank.com)

DSA ID creation for Shikhar SBB-

Please contact - SBBShikhar@axisbank.com

ID creation for Shikhar AgriLOS (Online Documentation Portal)-

For Operation Team EmpID, please contact RLOps2 (rl.ops2@axisbank.com) or RL Ops3 (rl.ops3@axisbank.com)