

SOP

Shikhar user creation / modification

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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.

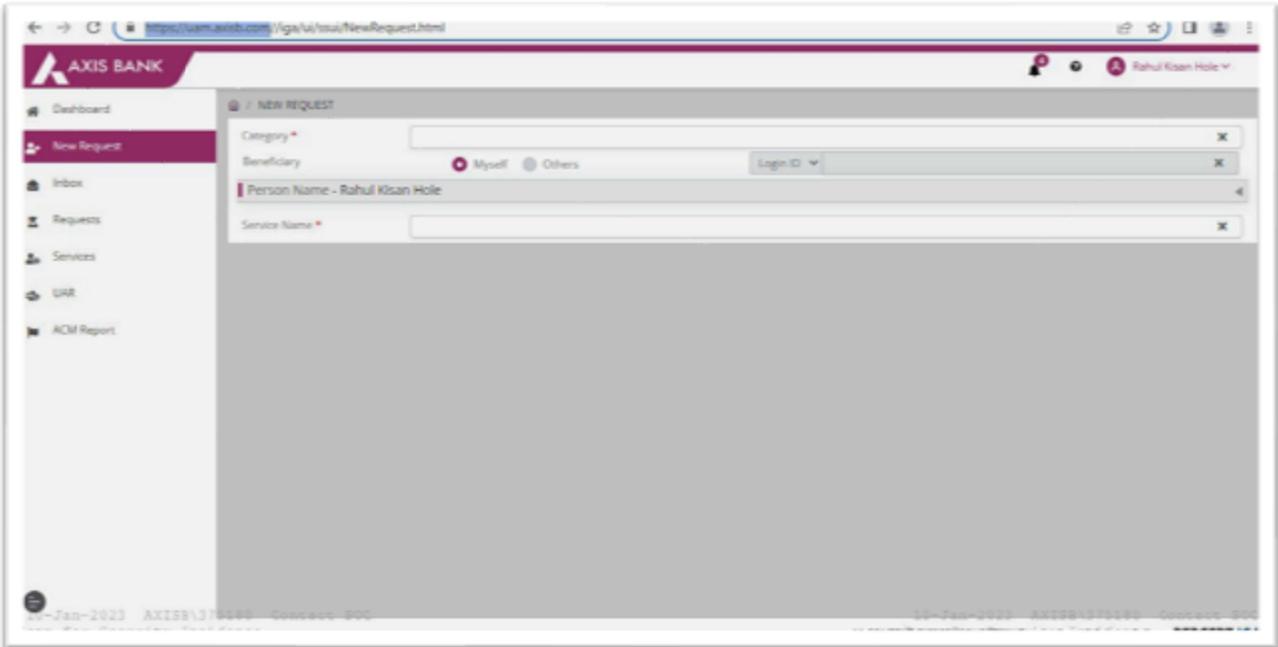
Application User Creation

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

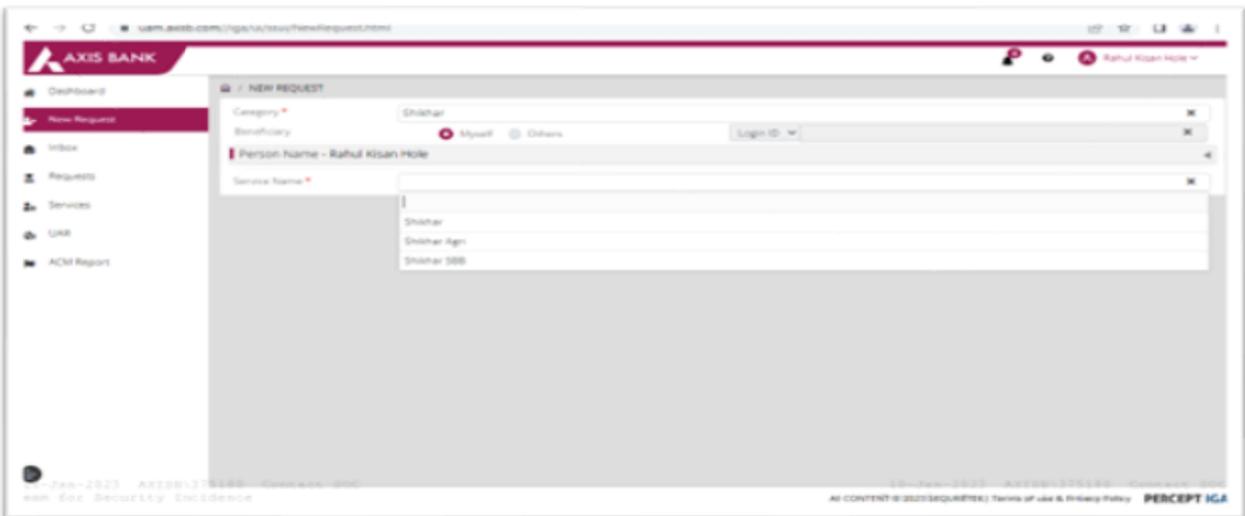
ID creation from Avatar/UAM

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



The screenshot shows the 'NEW REQUEST' form in the Axis Bank UAM portal. The 'Category' field is empty. The 'Beneficiary' field has radio buttons for 'Myself' (selected) and 'Others'. The 'Person Name' field contains 'Rahul Kisan Hole'. The 'Service Name' field is empty.

- 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



The screenshot shows the 'NEW REQUEST' form in the Axis Bank UAM portal. The 'Category' field is set to 'Shikhar'. The 'Beneficiary' field has radio buttons for 'Myself' (selected) and 'Others'. The 'Person Name' field contains 'Rahul Kisan Hole'. The 'Service Name' field is open, showing a dropdown menu with options: 'Shikhar', 'Shikhar Agri', and 'Shikhar SBB'.

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

The screenshot shows the 'NEW REQUEST' form in the Axis Bank portal. The form is filled with the following details:

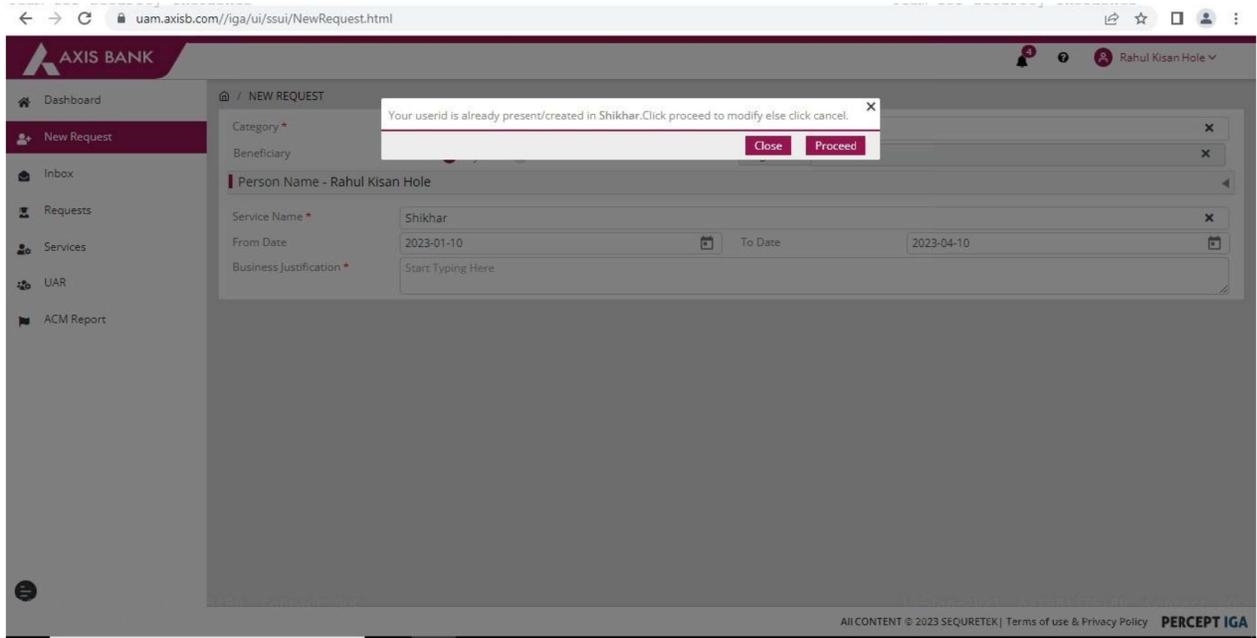
- Category:** Shikhar
- Secretary:** Myself
- Person Name:** Krishnakumar Ningsappa Marappa
- Service Name:** Shikhar
- From Date:** 2023-01-01
- To Date:** 2023-04-10
- Business Justification:** User Training
- Additional Data Required For Shikhar:**
 - Role:** Select
 - Zone:** Select
 - Product:** Multi Service

Buttons for 'Show Approval', 'Submit', and 'Reset' are located at the bottom of the form.

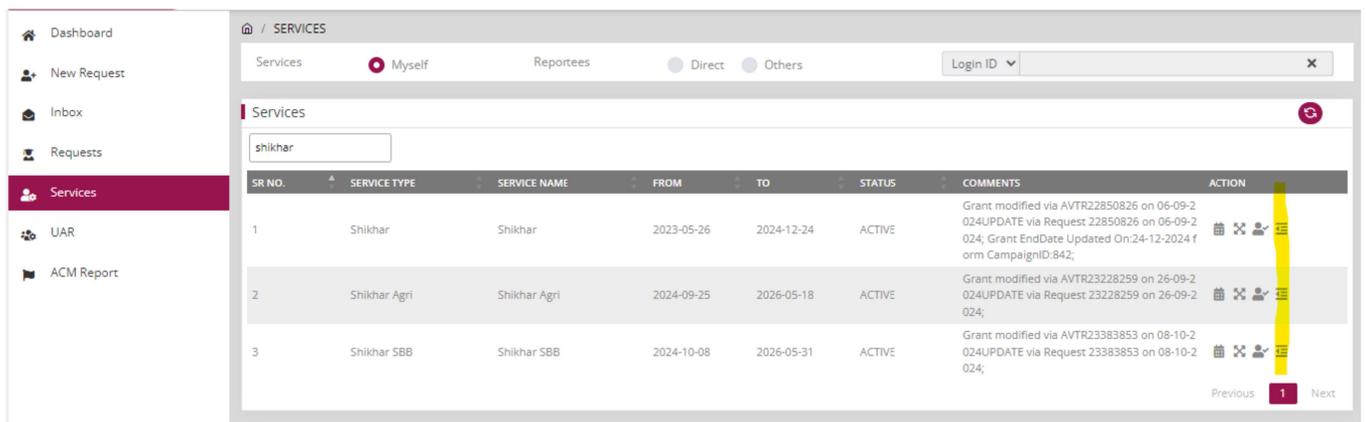
- v) Provide valid business justification that why is this user ID creation required
- vi) Select required fields like role, product, zone, region, CPC, ASC and cell
- vii) Click submit, and the request will go for approval with respective authorities. There is 2 level approval set, on both approval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

ID modification in Avatar/UAM

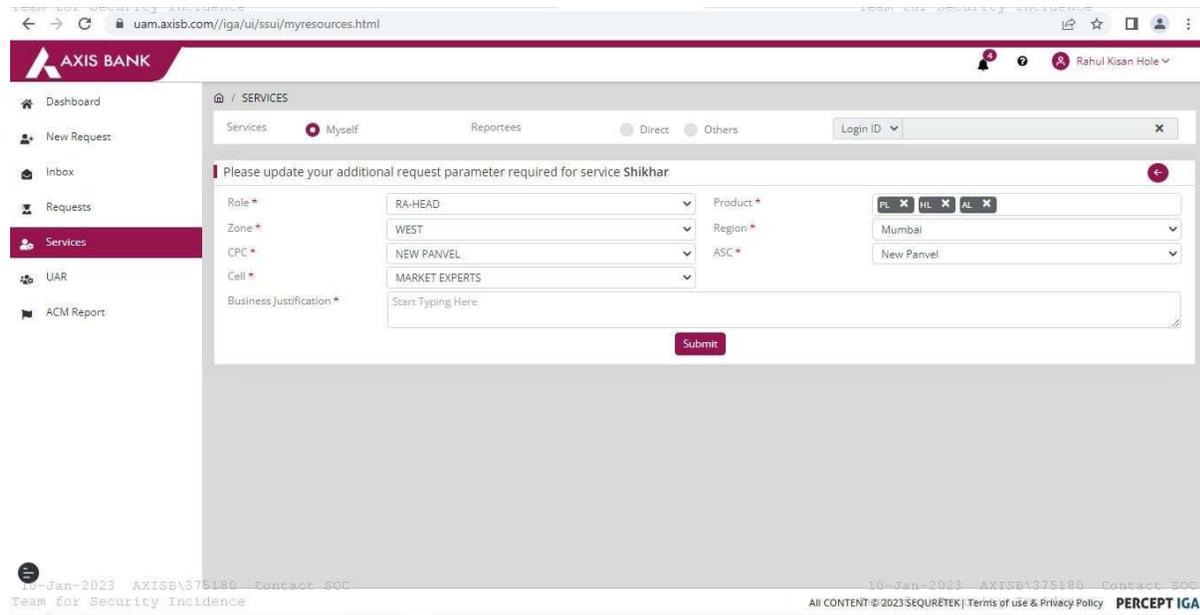
1) If Shikhar ID is already created and needs to be modified then, go to URL <https://uam.axisb.com>. select Category as Shikhar and respective Service name as as Shikhar / Shikhar Agri / Shikhar SBB, user will see pop with respective message as screenshot below



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.

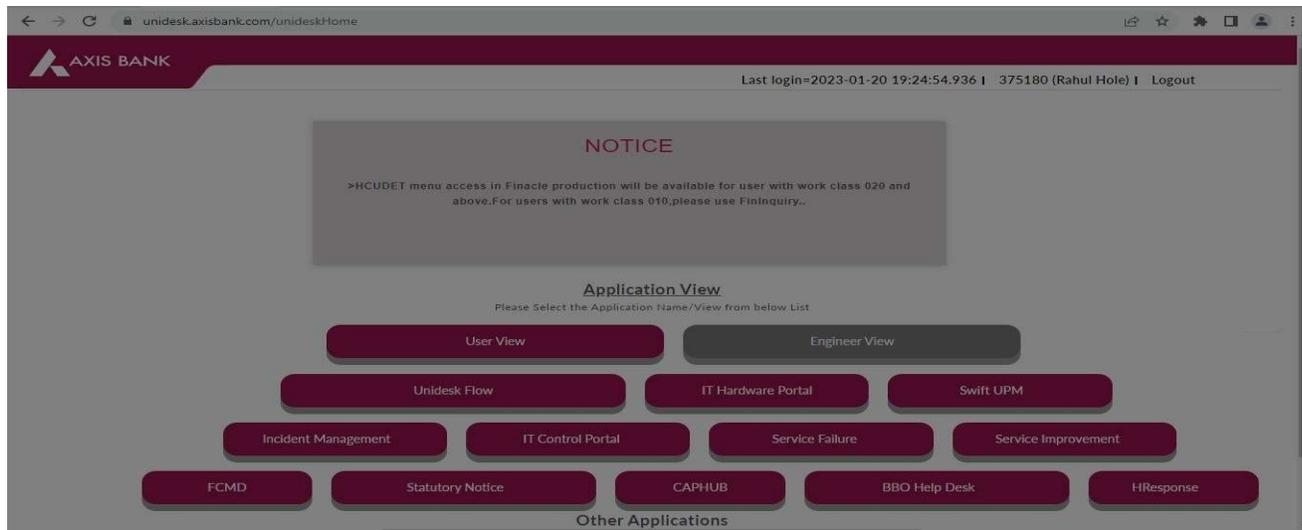


3. On clicking of modify request data, user will see the screen as shown in below screenshot. Among the fields present users can choose to change them as per requirement with proper business justification. User ID will be modified on 2 level approvals received from respective approvers.

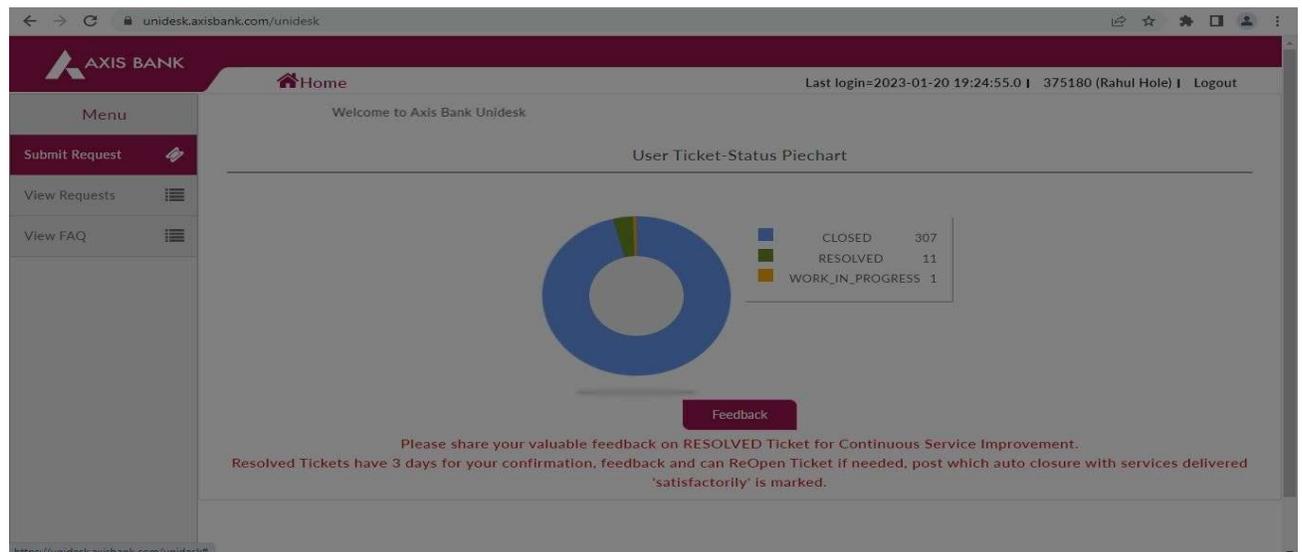


DSA ID creation for Shikhar Retail-

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



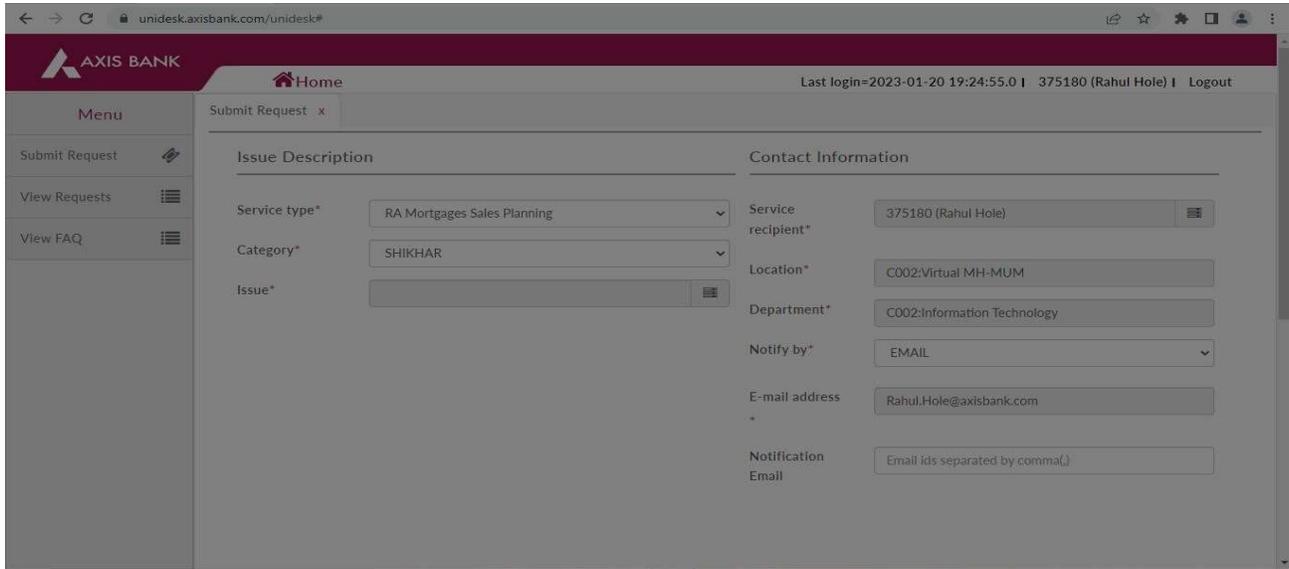
3. Click on Submit request



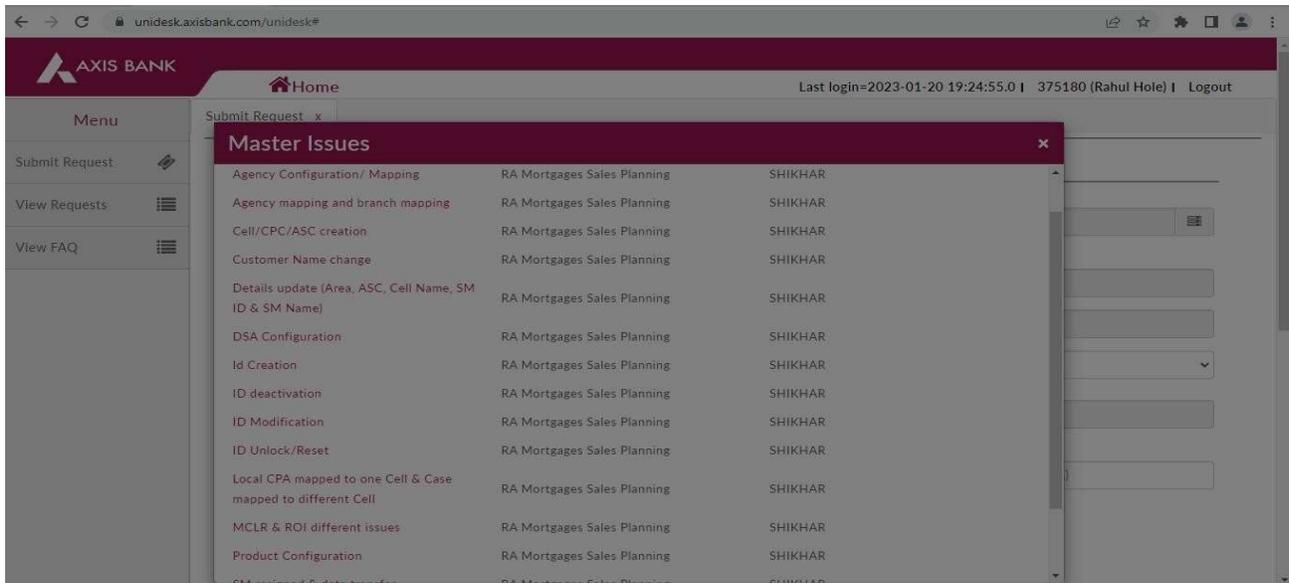
4. For Home Loan
 1. In Service type select option RA Mortgages Sales Planning
 2. In Category select option SHIKHAR

5. For Personal Loan

- 1) In Service type select option RA Personal Loan
- 2) In Category select option Shikhar_ PL



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



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)