

**Oracle FLEXCUBE Investor Servicing®  
Extensibility By Example Volume 1**

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# 1 Preface

This document Extensibility By Example, discuss the step by step procedure to do certain extensibility changes / development in FLEXCUBE IS.

## 1.1 Audience

The Extensibility By Example book is intended for FLEXCUBE Application Developers/Users who are authorized to perform the following tasks:

- Modify the layouts of existing FLEXCUBE Screens
- Modify the existing functionality by adding new fields/tabs/data blocks
- Extend the existing screen to have fields based on customer specific table/fields
- Add customer specific validations at extension hooks
- Add customer specific processing logics in batch processing
- Add customer specific notifications
- Add customer specific calculation elements
- Add customer specific reports

To Use this manual, you need conceptual and working knowledge of the below:

<i>Proficiency</i>	<i>Resources</i>
FLEXCUBE IS Development overview	<i>FCIS-FD01-01-01-Development Overview Guide</i>
RAD function ID development getting started	<i>FCIS-FD02-01-01-RAD Getting Started</i>
Extensibility introduction	<i>FCIS-FD03-01-01-Extensibility Getting started</i>

## 1.2 Related documents

For more information on Extensibility, refer the below documents:

- *FCIS-FD03-01-01-Extensibility Getting started*
- *FCIS-FD03-02-01-Extensibility Reference Guide*
- *FCIS-FD03-03-01-Extensibility By Example Volume 2*

## 1.3 Conventions

The following text conventions are used in this document:

### Convention Meaning

**boldface** Boldface type indicates graphical user interface elements (for example, menus and menu items, buttons, tabs, dialog controls), including options that you select.

*italic* italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

monospace Monospace type indicates language and syntax elements, directory and file names, URLs, text that appears on the screen, or text that you enter.

## 1.4 Pre-request for Extensibility development

The following are pre-request for extensibility development:

- *Target FLEXCUBE environment* where changes can be deployed and tested.

Ensure environment *SMTB\_PARAMETERS.RELEASE\_TYPE* is set properly to CUSTOM/CLUSTER depending upon your requirement.

- *RAD Tools environment* that linked with Target environment data base schema.

Ensure the *RAD project release type* is set either CUSTOM /CLUSTER depending upon your requirement.

For more information, refer documents mentioned in related documents section.

## 2 Introduction

### 2.1 How to use this Guide

The information in this guide includes:

- [Chapter 2, “ Introduction”](#)

Introduction section of this guide

- [Chapter 3, “Screen Extensibility -hide Field, Tab and Button”](#)

This section describes steps to hide a field or Tab or Button. This is required as some fields, tab or button may be irrelevant to a given FLEXCUBE IS implementation.

- [Chapter 4, “Screen Extensibility - Customize Address Field”](#)

This section describes steps to customize a given “address” field to suite the extensible requirement

- [Chapter 5, “Screen Extensibility – Add fields to an existing screen ”](#)

This section describes steps to add new fields to existing screen.

- [Chapter 6, “Call out Extensibility – Add validations”](#)

This section describes steps to add validations at call out packages at database layer.

- [Chapter 7, “Adding UDF”](#)

This section describes the steps to add user defined field to a given maintenance screen and shows how it is used.

- [Chapter 8, “Adding SDE and IC Rule”](#)

This section describes the steps to add SDE and link it to a given rule in IC module.

### **3 Screen Extensibility - hide Field, Tab and Button**

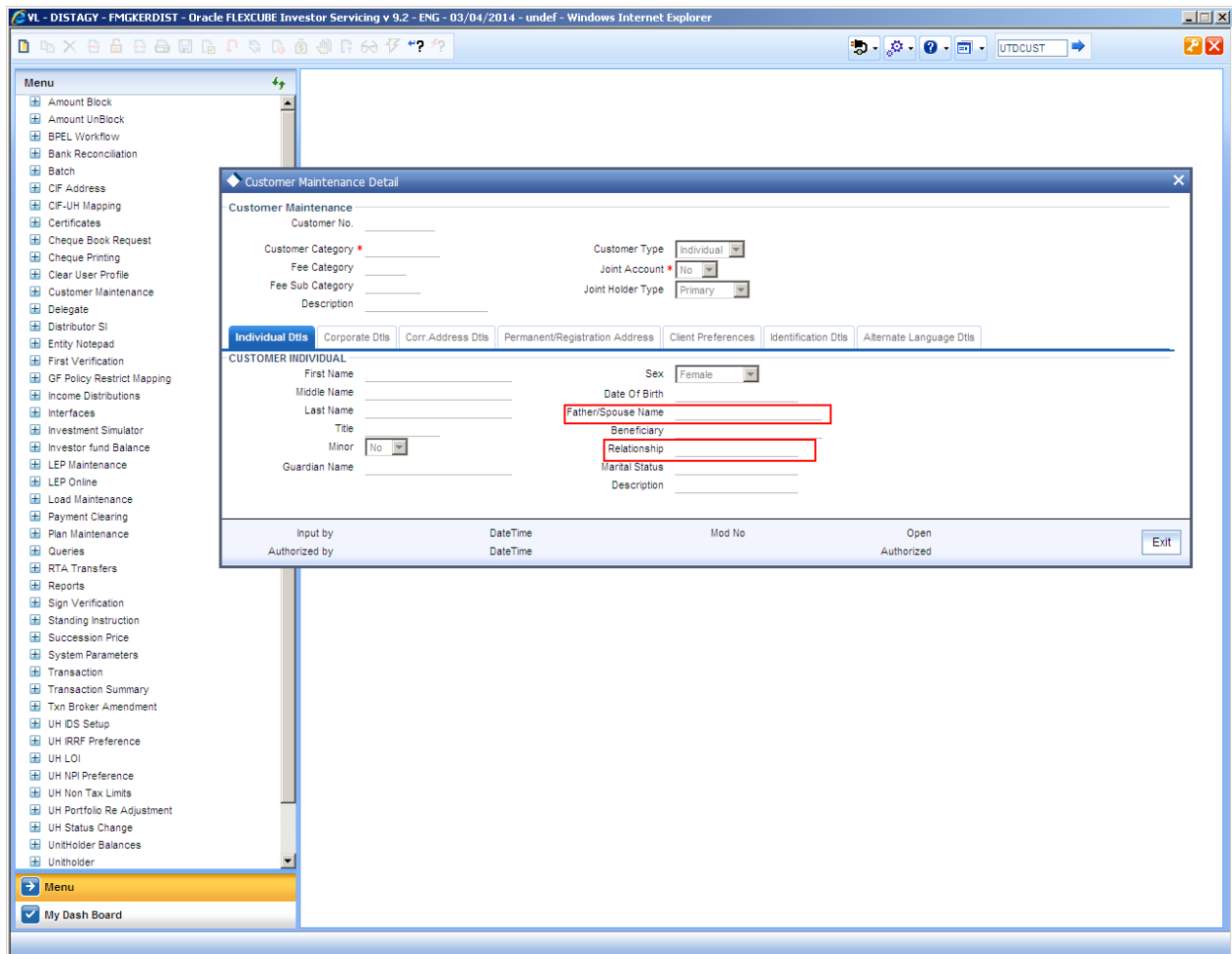
#### **3.1 Extensibility Requirement description**

Hide following fields in UTDCUST screen

- **Relationship** *field* in Main screen
- **Father/Spouse Name** *field* in Main screen

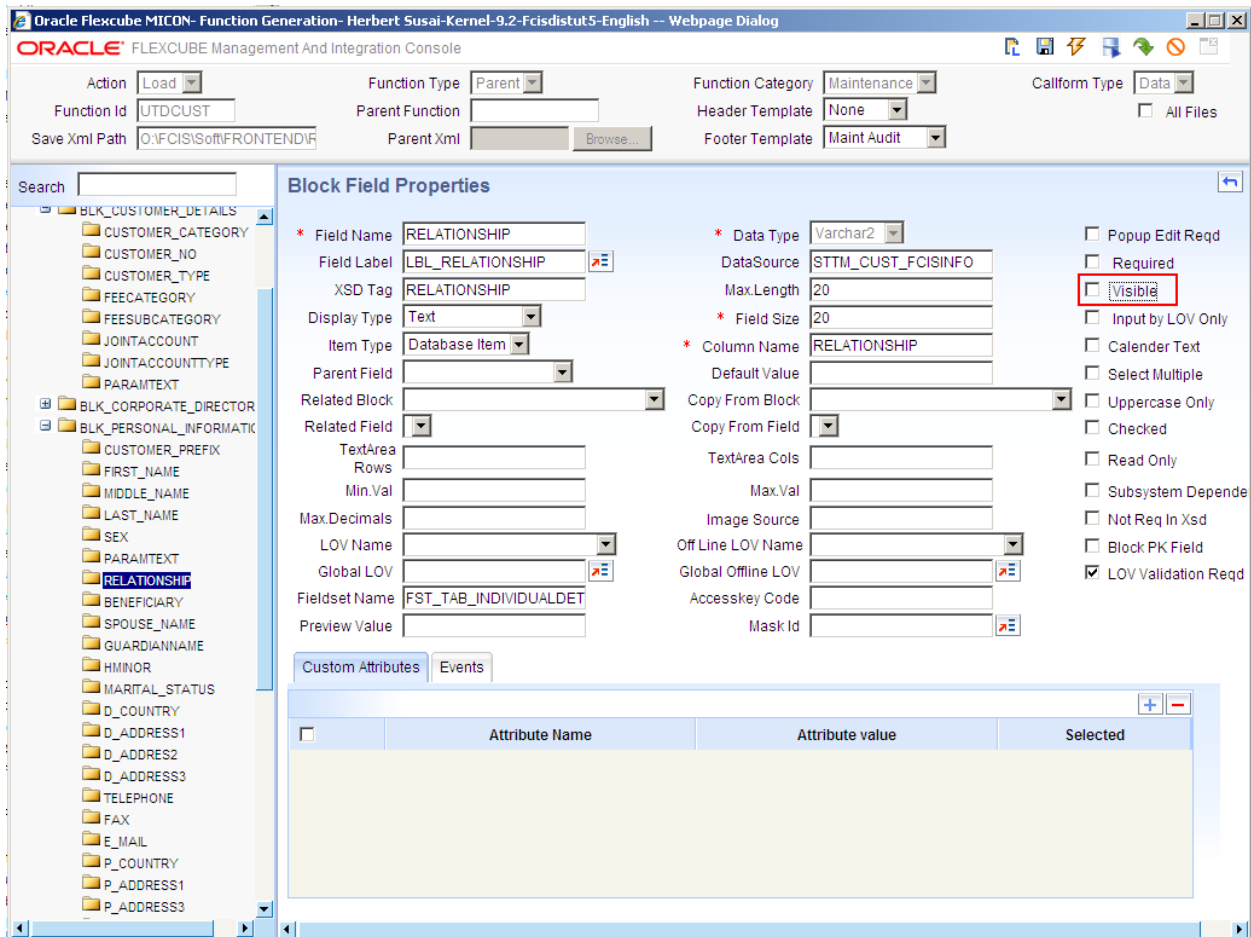
### 3.1.1 UTDCUST Existing Screen

The below picture shows the UTDCUST screen prior to extensibility



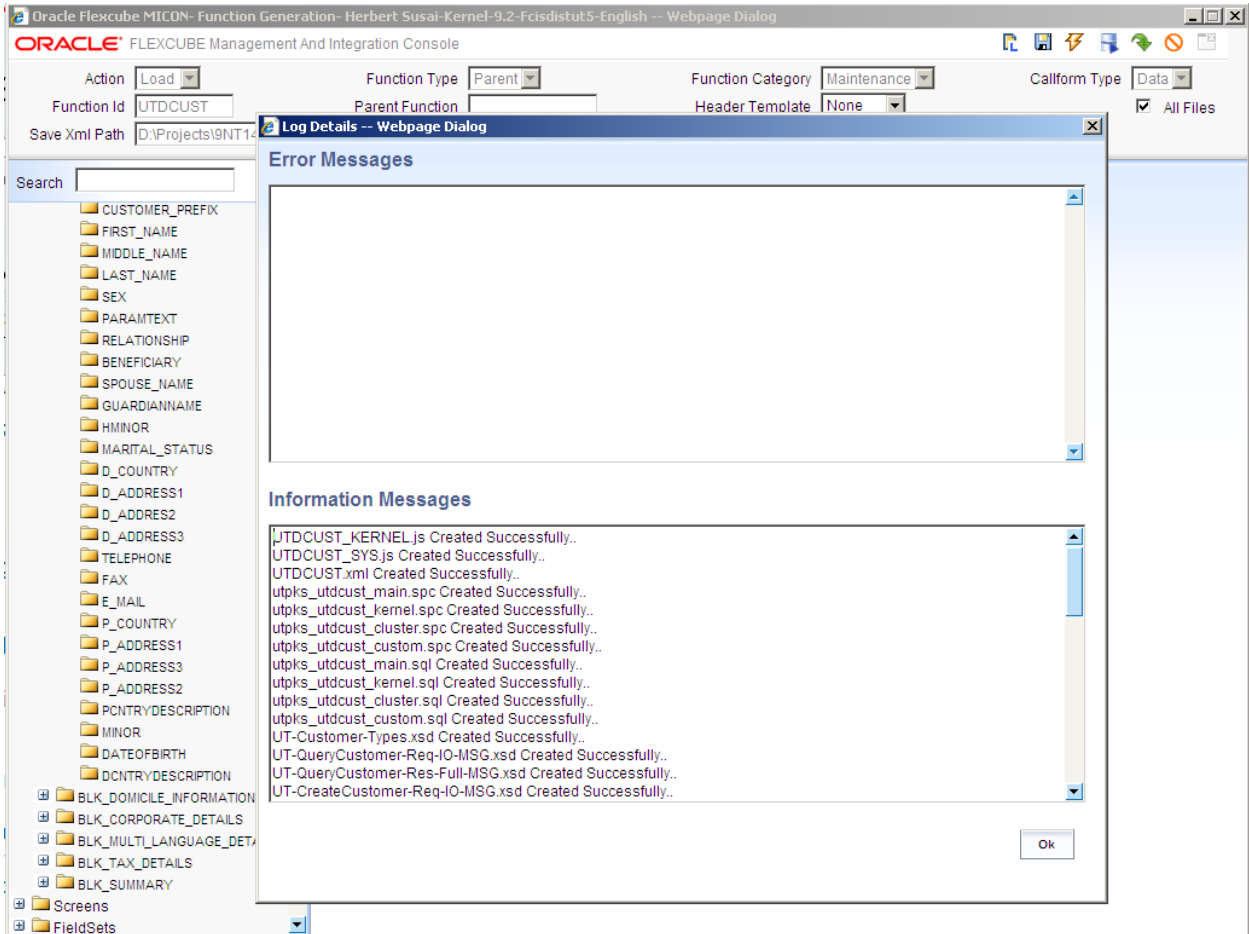
### 3.2 Disabling the Field

- Open the UTDCUST\_RAD.XML using RAD tool
- Navigate as follows
  - DataBlocks → BLK\_PERSONAL\_INFORMATION → RELATIONSHIP
  - DataBlocks → BLK\_PERSONAL\_INFORMATION → SPOUSE\_NAME
- Un check the *Visible*
- Save the UTDCUST\_RAD.XML



### 3.3 Generating RAD files

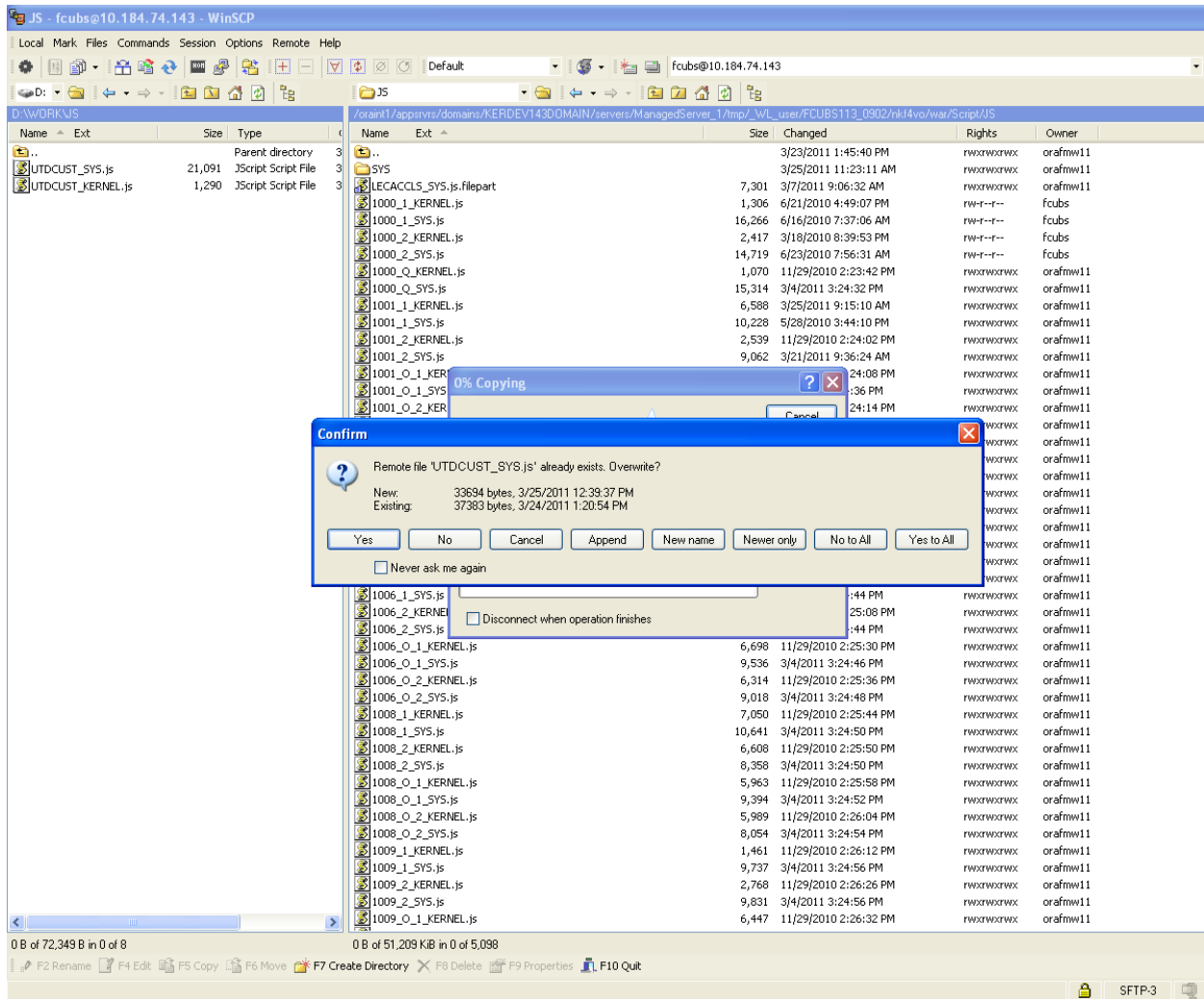
Generate the files from RAD tool and ensure status are “Generated”.





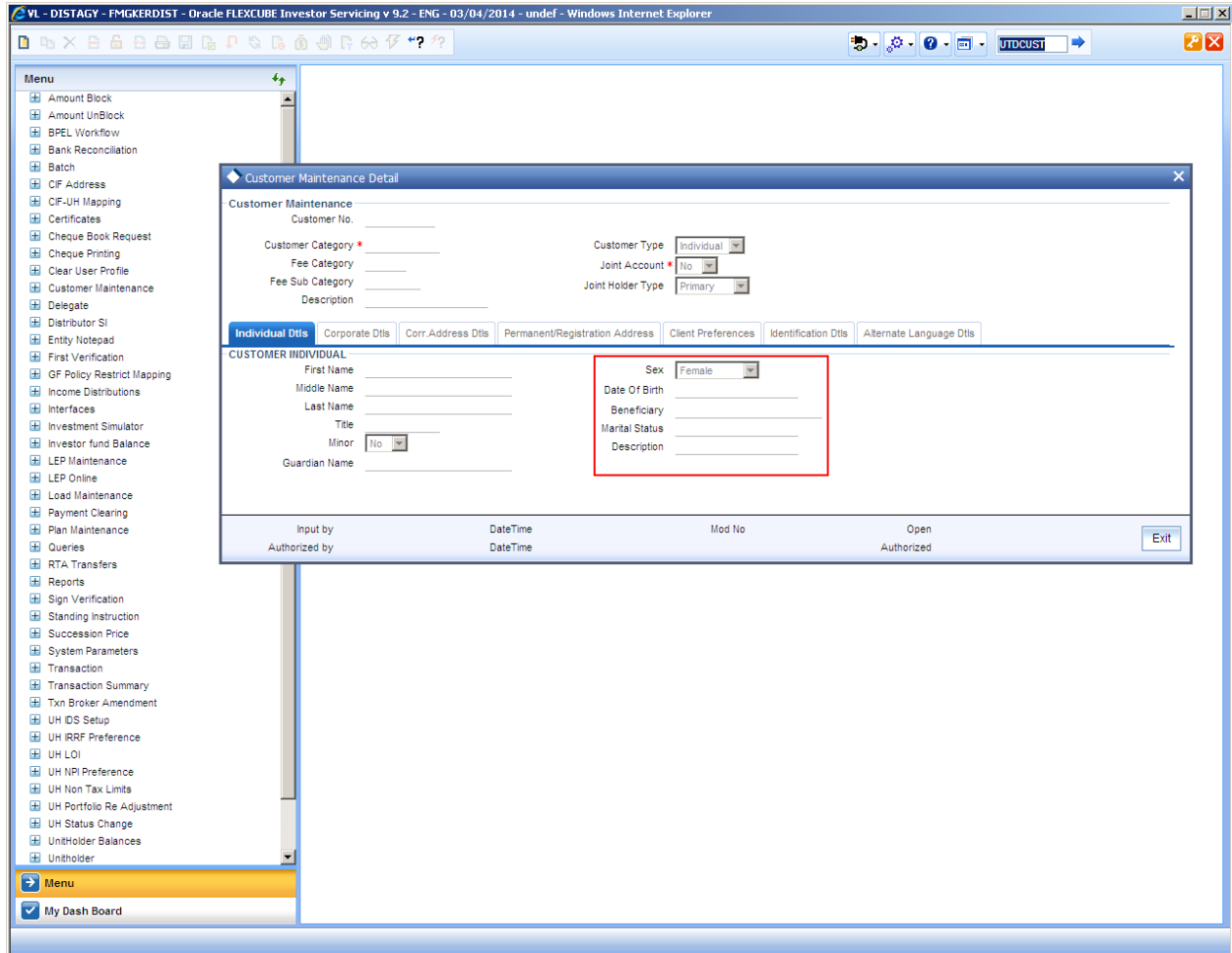
### 3.4 Deploying the files

- Copy the UIXML generated to respective path of FLEXCUBE target environment
- Copy the Java Script files to the respective path of FLEXCUBE target environment



### 3.5 Test the changes

- Launch the Target FLEXCUBE URL
- Launch the UTDCUST screen and test the changes developed.



## 4 Screen Extensibility - Customize Address Field

### 4.1 Extensibility Requirement description

Enhance the UTDCUST function ID to have the following changes:

- Rename Correspondence Address -> Address line 2 as State to refer pin code
- Rename Correspondence Address -> City as Country to refer state codes
- Add LOV to State field
- Add LOV to Country field

#### 4.1.1 Assumption

Assume that State and Country field LOVs would fetch from below tables where the data is factory shipped. This means there is no screen to populate the data.

**Table Name:** PARAMSTBL

<i>Column Name</i>	<i>Data Type</i>	<i>Data Length</i>	<i>Constraints</i>
PARAMVALUE	VARCHAR2	25	
PARAMTEXT	VARCHAR2	255	

Note: If new screen needs to be developed for these tables, refer the document *FCIS-FD02-02-01-RAD Function ID Development*.

### 4.2 RAD changes specification

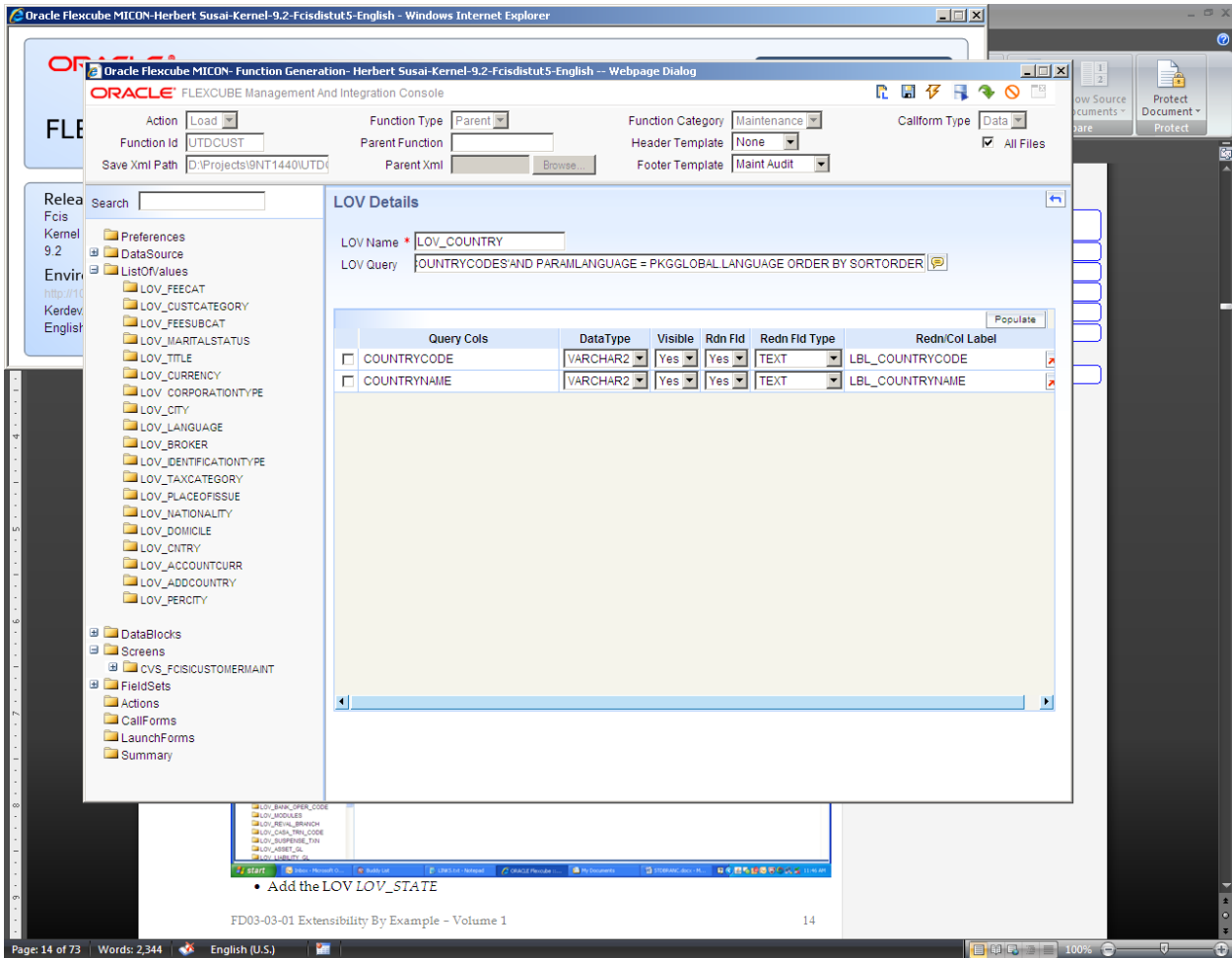
- Unit Name: UTDCUST\_RAD.XML
- Canvas Name: CVS\_FCISICUSTOMERMAINT
- Block Name: BLK\_MULTI\_LANGUAGE\_DETAILS

<b>Item Name</b>	<b>Description</b>	<b>Item Type</b>
LOV_COUNTRY	SELECT PARAMVALUE COUNTRYCODE,PARAMTEXT COUNTRYNAME	LOV

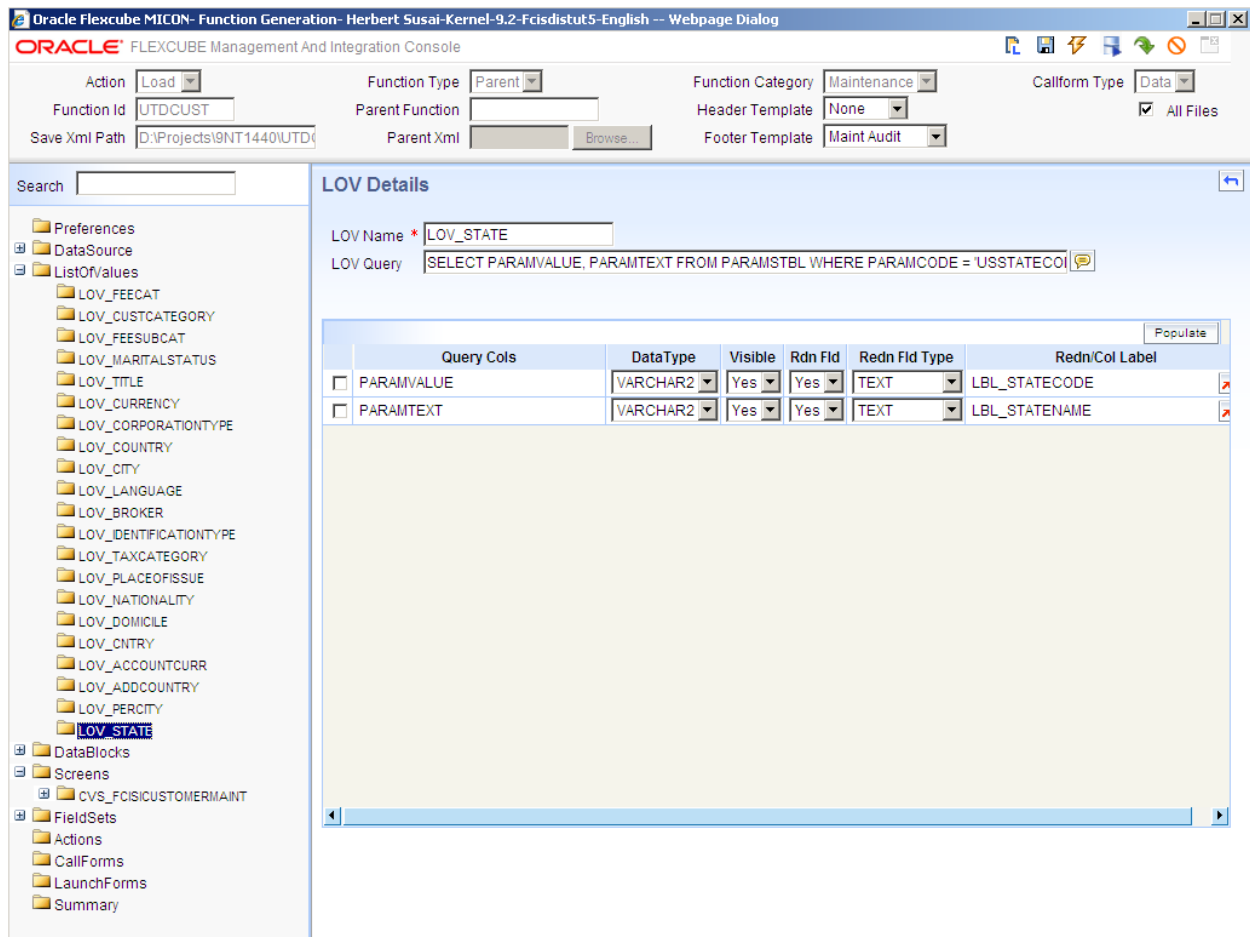
	FROM PARAMSTBL WHERE PARAMCODE = 'COUNTRYCODES'AND PARAMLANGUAGE = PKGGLOBAL.LANGUAGE ORDER BY SORTORDER	
LOV_STATE	SELECT PARAMVALUE, PARAMTEXT FROM PARAMSTBL WHERE PARAMCODE = 'USSTATECODES' AND 1=? AND PARAMLANGUAGE = pkgGlobal.Language ORDER BY PARAMCODE, SORTORDER, PARAMLANGUAGE	LOV
Address Line 2	State	LABEL
City	Country	LABEL

### 4.3 Add LOVs

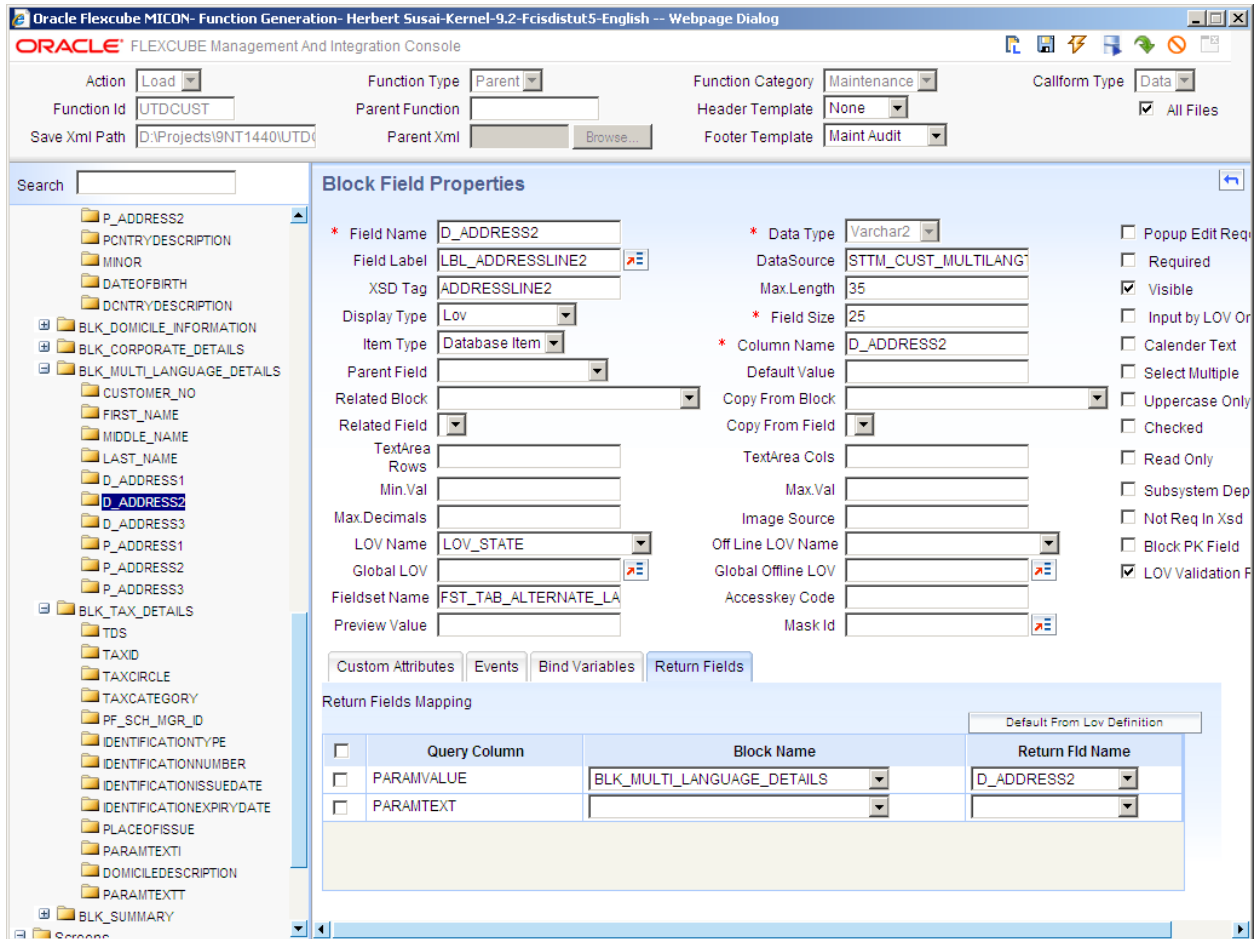
- Open the UTDCUST\_RAD.XML
- Navigate to ListOfValues
- Rightclick and add LOV - *LOV\_COUNTRY* as per details shown in below picture



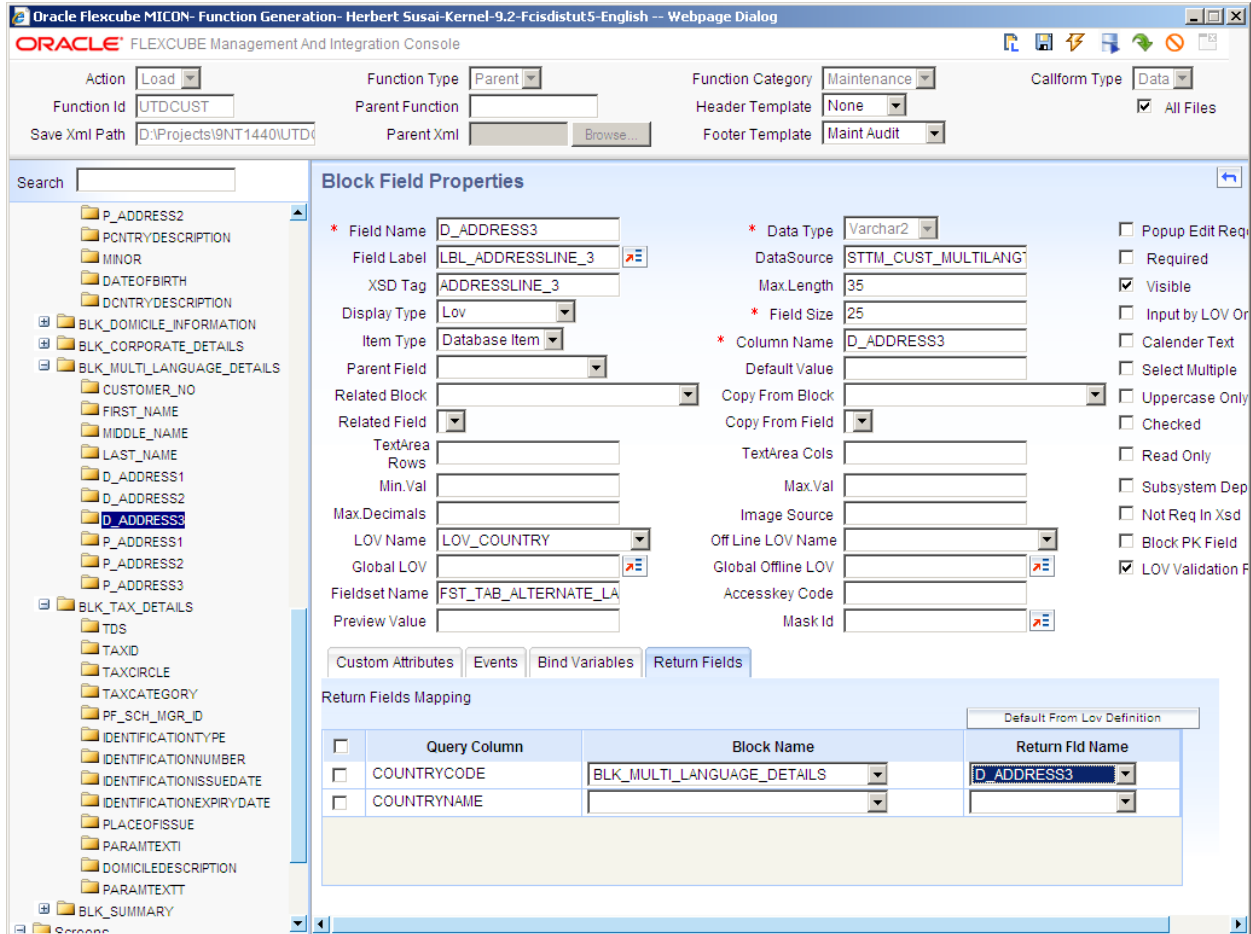
- Add the LOV *LOV\_STATE*



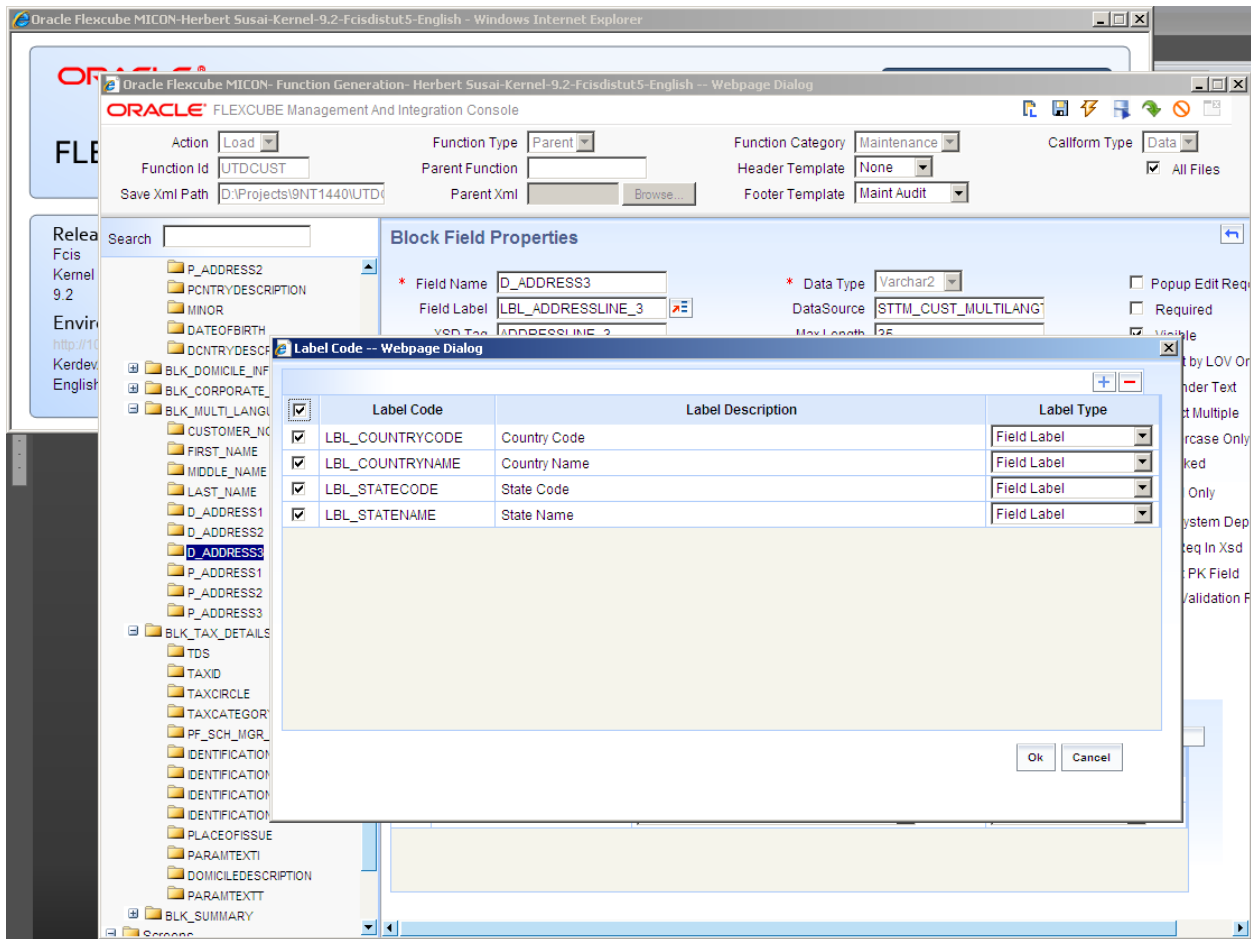
- Navigate as below
  - DataBlocks → BLK\_MULTI\_LANGUAGE\_DETAILS → D\_ADDRESS2
- Select LOV Name as “LOV\_STATE”
- Select Return Fld Name as D\_ADDRESS2 as shown below



- Navigate as below
  - DataBlocks → BLK\_MULTI\_LANGUAGE\_DETAILS → D\_ADDRESS3
- Select LOV Name as "LOV\_COUNTRY"
- Select Return Fld Name as D\_ADDRESS3 as shown below

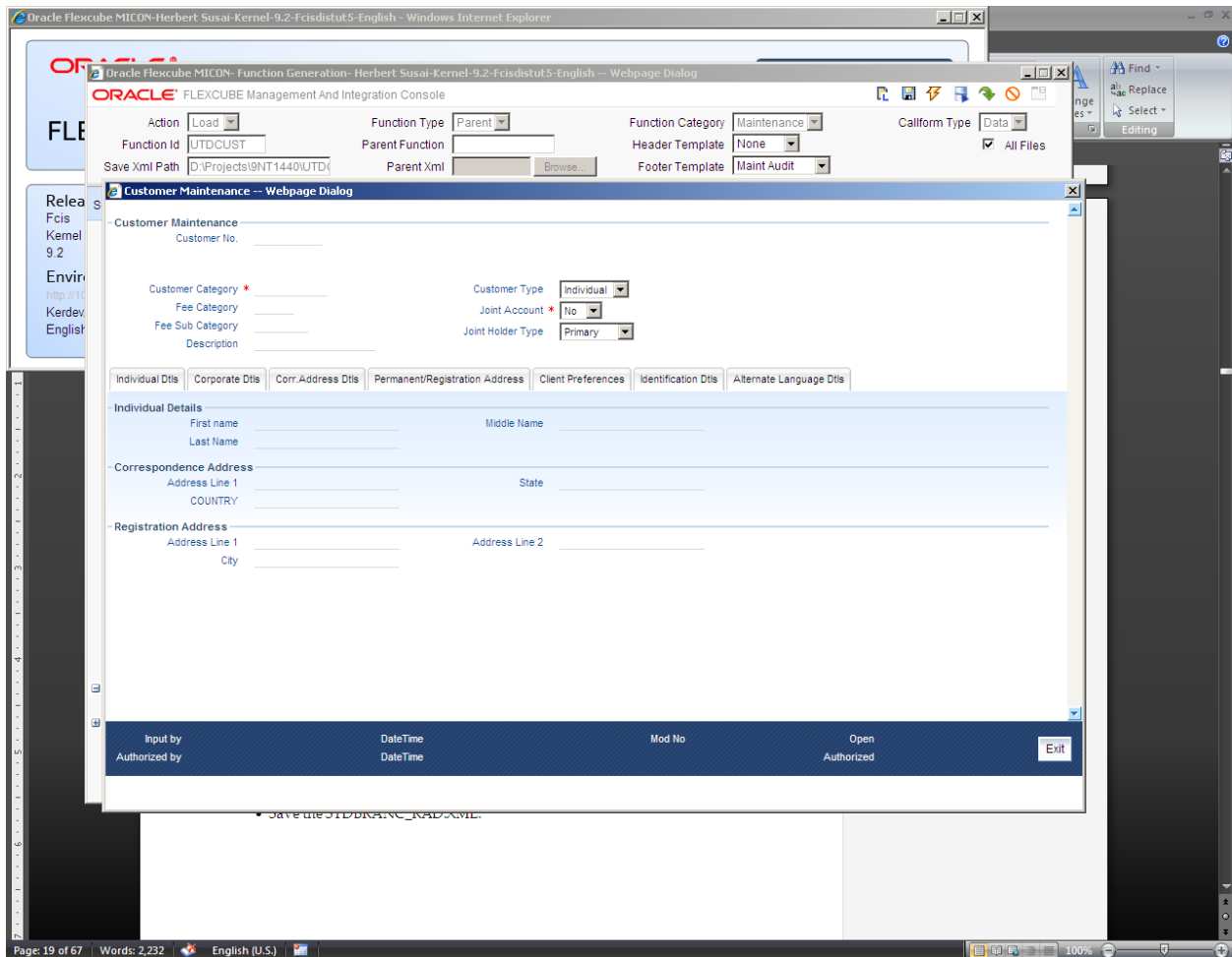


- Select Field Label attribute and change description as below





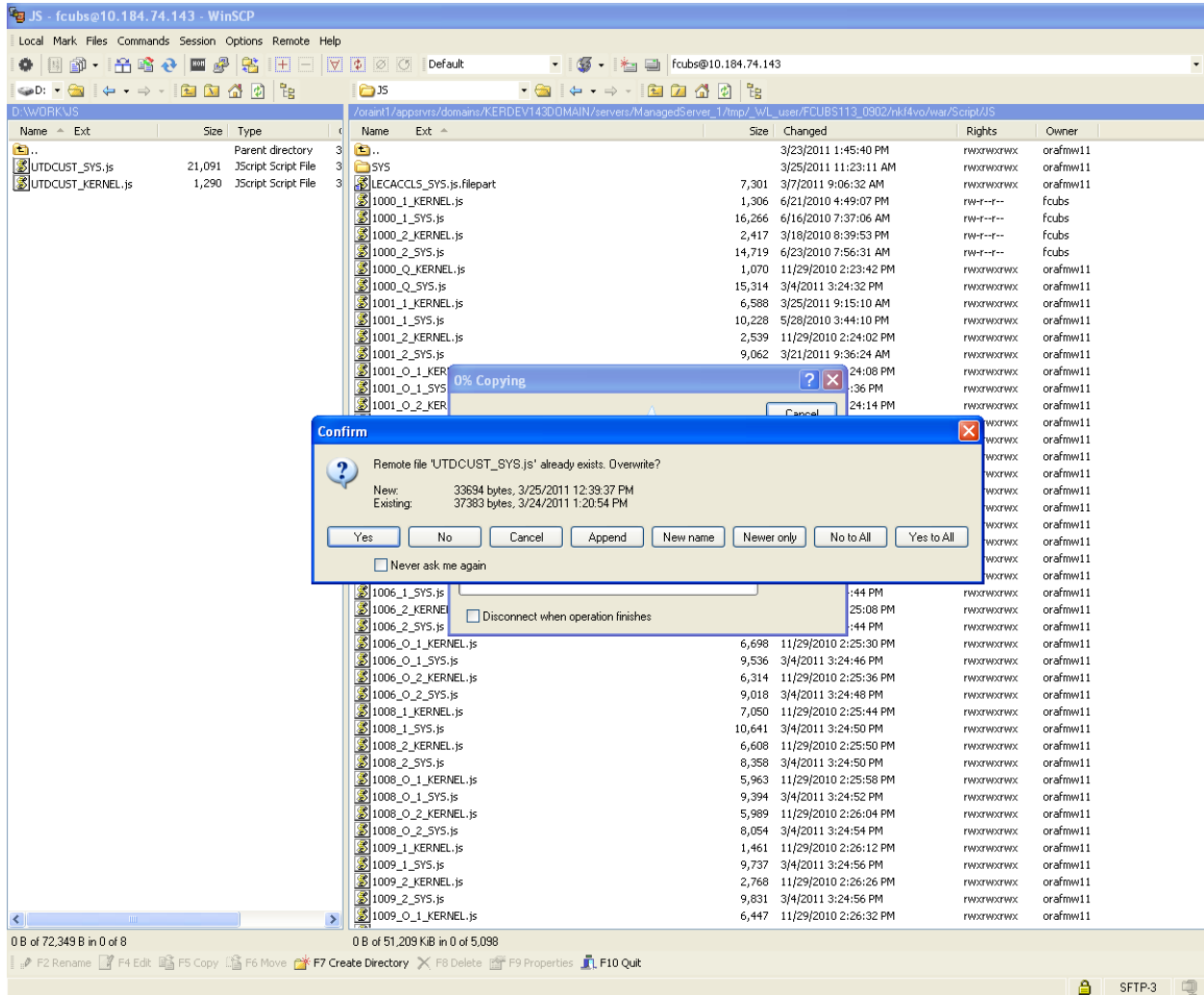
## 4.4 Preview the changes



- Save the UTDCUST\_RAD.XML.

## 4.5 Deploy the files

- Deploy the UIXML and Java script files. Compile the database units created.



## 4.6 Test the changes

- Launch the UTDCUST screen and test the changes

The screenshot shows the 'Customer Maintenance Detail' window in Oracle FLEXCUBE Investor Servicing v 9.2. The window is titled 'Customer Maintenance Detail' and has a 'Cancel' button in the bottom right corner. The main content area is divided into several sections:

- Customer Maintenance:** Fields for Customer No., Customer Category (with a dropdown arrow), Fee Category (with a dropdown arrow), Fee Sub Category (with a dropdown arrow), and Description (with a dropdown arrow). To the right, there are dropdowns for Customer Type (set to 'Individual'), Joint Account (set to 'No'), and Joint Holder Type (set to 'Primary').
- Navigation Tabs:** A row of tabs includes 'Individual Dtls', 'Corporate Dtls', 'Corr. Address Dtls', 'Permanent/Registration Address', 'Client Preferences', 'Identification Dtls', and 'Alternate Language Dtls'. The 'Alternate Language Dtls' tab is currently selected.
- Individual Details:** Fields for First Name, Middle Name, and Last Name.
- Correspondence Address:** Fields for Address Line 1, State (with a dropdown arrow), and Country (with a dropdown arrow).
- Registration Address:** Fields for Address Line 1 and Address Line 2.

At the bottom of the window, there is a table with columns: 'Input by', 'Authorized by', 'DateTime', 'Mod No', and 'Open Authorized'. A 'Cancel' button is located at the bottom right of this section. On the left side of the window, there is a 'Menu' pane with a list of options including 'Amount Block', 'Amount Unblock', 'BPEL Workflow', 'Bank Reconciliation', 'Batch', 'CIF Address', 'CIF-UH Mapping', 'Certificates', 'Cheque Book Request', 'Cheque Printing', 'Clear User Profile', 'Customer Maintenance', 'Delegate', 'Distributor SI', 'Entity Notepad', 'First Verification', 'GF Policy Restrict Mapping', 'Income Distributions', 'Interfaces', 'Investment Simulator', 'Investor fund Balance', 'LEP Maintenance', 'LEP Online', 'Load Maintenance', 'Payment Clearing', 'Plan Maintenance', 'Queries', 'RTA Transfers', 'Reports', 'Sign Verification', 'Standing Instruction', 'Succession Price', 'System Parameters', 'Transaction', 'Transaction Summary', 'Txn Broker Amendment', 'UH DS Setup', 'UH IRRF Preference', 'UH LOI', 'UH NPI Preference', 'UH Non Tax Limits', 'UH Portfolio Re Adjustment', and 'UH Status Change'. Below the menu list are 'Menu', 'Tasks', and 'My Dash Board' options.

## 5 Screen Extensibility - Add Fields to an Existing Screen

### 5.1 Extensibility Requirement description

Add the following in UTDCADD function ID

- Add the fields ENABLEDFLAG and Term in Main canvas screen.

### 5.2 RAD changes specification

- Create new Table: STTMCUSTOMERADDRESSTBL

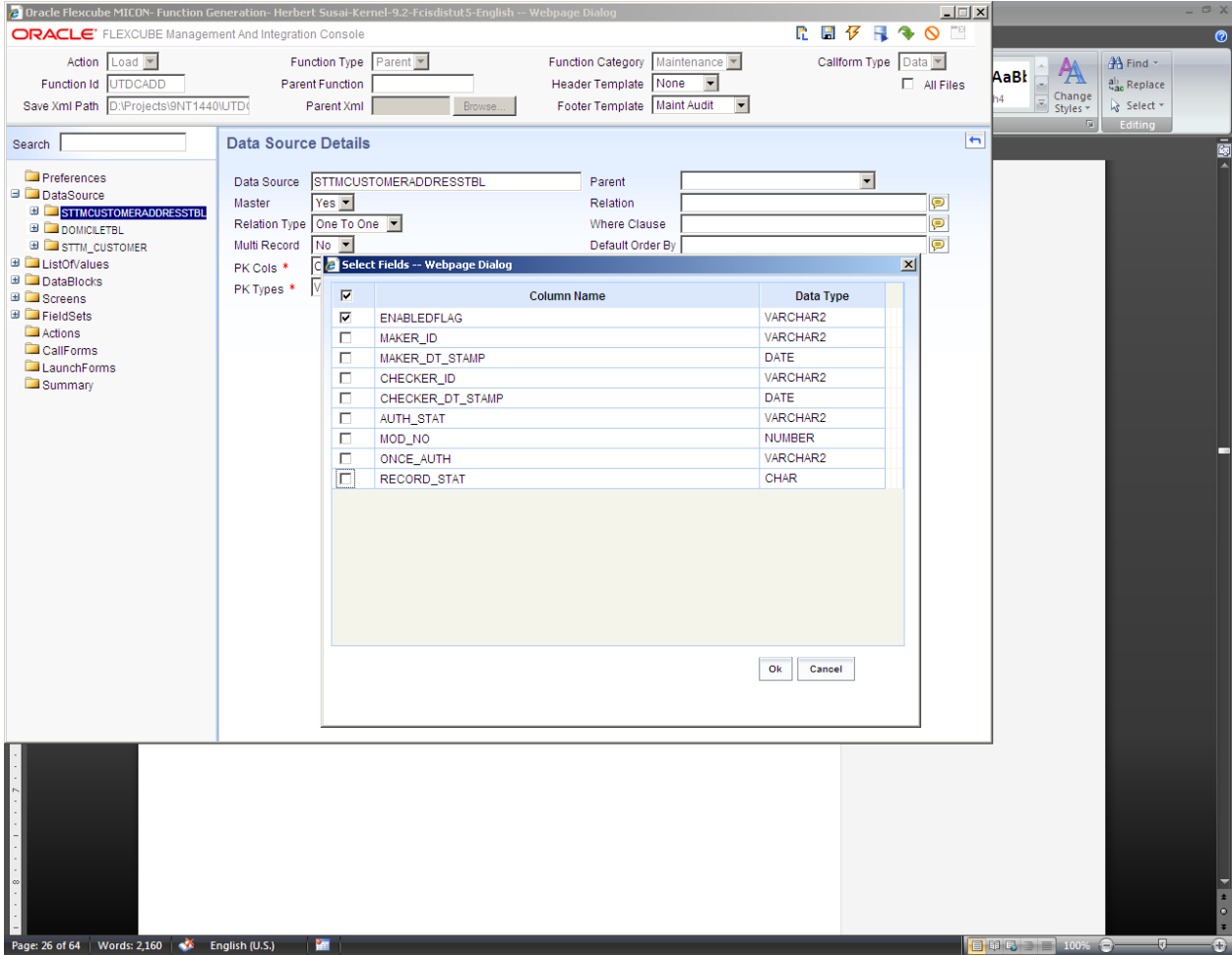
<i>Column Name</i>	<i>Data Type</i>	<i>Data Length</i>	<i>Constraints</i>
ENABLEDFLAG	VARCHAR2	1	

- Add items ENABLEDFLAG

<b>Item Name</b>	<b>Item Type</b>	<b>Label Code</b>	<b>Ame nd- able</b>	<b>Read Only</b>
ENABLEDFLAG	TEXT	LBL_ENABLE	Y	N

### 5.3 RAD development steps

- ADD the FIELD ENABLEDFLAG in the Datasource STTMCUSTOMERADDRESSTBL.



Oracle Flexcube MICON- Function Generation- Herbert Susai-Kernel-9.2-Fcisdistut5-English -- Webpage Dialog

**ORACLE** FLEXCUBE Management And Integration Console

Action: Load | Function Type: Parent | Function Category: Maintenance | Callform Type: Data

Function Id: UTDCADD | Parent Function: | Header Template: None | All Files:

Save Xml Path: D:\Projects\9NT1440\UTD\ | Parent Xml: | Footer Template: Maint Audit

---

**Block Properties**

Block Name: BLK\_CUSTADD | Block Title: LBL\_CADD

Parent: | Relation Type: One To One

XSD Node: Custadd | Block Type: Normal

Multi Record:  DataBlock -- Webpage Dialog

Datasource: STTMCUSTOMERADDRESSTBL

<input type="checkbox"/>	Column Name	Field Name	Label Code
<input type="checkbox"/>	MODULEID		
<input type="checkbox"/>	AGENTCODE		
<input type="checkbox"/>	BRANCHCODE		
<input checked="" type="checkbox"/>	ENABLEDFLAG	ENABLEDFLAG	LBL_ENABLEDFLAG

Ok | Cancel

- ADD the fields ENABLEDFLAG in the required section

The screenshot shows the Oracle Flexcube MICON Function Generation console. The main window title is "Oracle Flexcube MICON- Function Generation- Herbert Susai-Kernel-9.2-Fcisdistut5-English -- Webpage Dialog". The console displays the "FieldSet Properties" for a function named "FST\_CIFADDMMAINT".

**FieldSet Properties:**

- Fieldset Name: FST\_CIFADDMMAINT
- Fieldset Label: CIF Address Maintenance
- Data Block: BLK\_CUSTADD
- Multi Record: No
- View Type: Single
- Fieldset Height: [Empty]
- No Of Rows: [Empty]
- Screen Name: CVS\_CIFADDMMAINT
- Screen Portion: Body
- Tab Name: TAB\_MAIN
- Section Name: SEC\_1
- Partition Name: PART\_1
- Fieldset Width: [Empty]

**Data Block Fields:**

A table titled "FieldSet Fields" is shown, listing fields and their subpartition names:

FieldSet Fields	Subpartition Name
<input type="checkbox"/> CIFNUMBER	[Dropdown]
<input type="checkbox"/> CUSTOMER_NAME1	[Dropdown]
<input type="checkbox"/> MEDIA	[Dropdown]
<input type="checkbox"/> LOCATION	[Dropdown]
<input type="checkbox"/> ADDRESS1	[Dropdown]
<input type="checkbox"/> ADDRESS2	[Dropdown]
<input type="checkbox"/> ADDRESS3	[Dropdown]
<input type="checkbox"/> ADDRESS4	[Dropdown]
<input type="checkbox"/> ENABLEDFLAG	[Dropdown]

The left sidebar shows a tree view of the project structure, including folders for "DataBlocks", "Screens", "FieldSets", "Actions", "CallForms", "LaunchForms", and "Summary". The "FieldSets" folder is expanded, showing "FST\_CIFADDMMAINT" selected.

- Add Labels for ENABLEDFLAG

The screenshot displays the Oracle Flexcube Management And Integration Console interface. The main window shows the 'FieldSet Properties' for the 'FST\_CIFADDMAINT' fieldset. The 'Label Code' dialog is open, showing a table with one entry: 'LBL\_ENABLEDFLAG' with the description 'Enable' and 'Field Label' type.

**FieldSet Properties:**

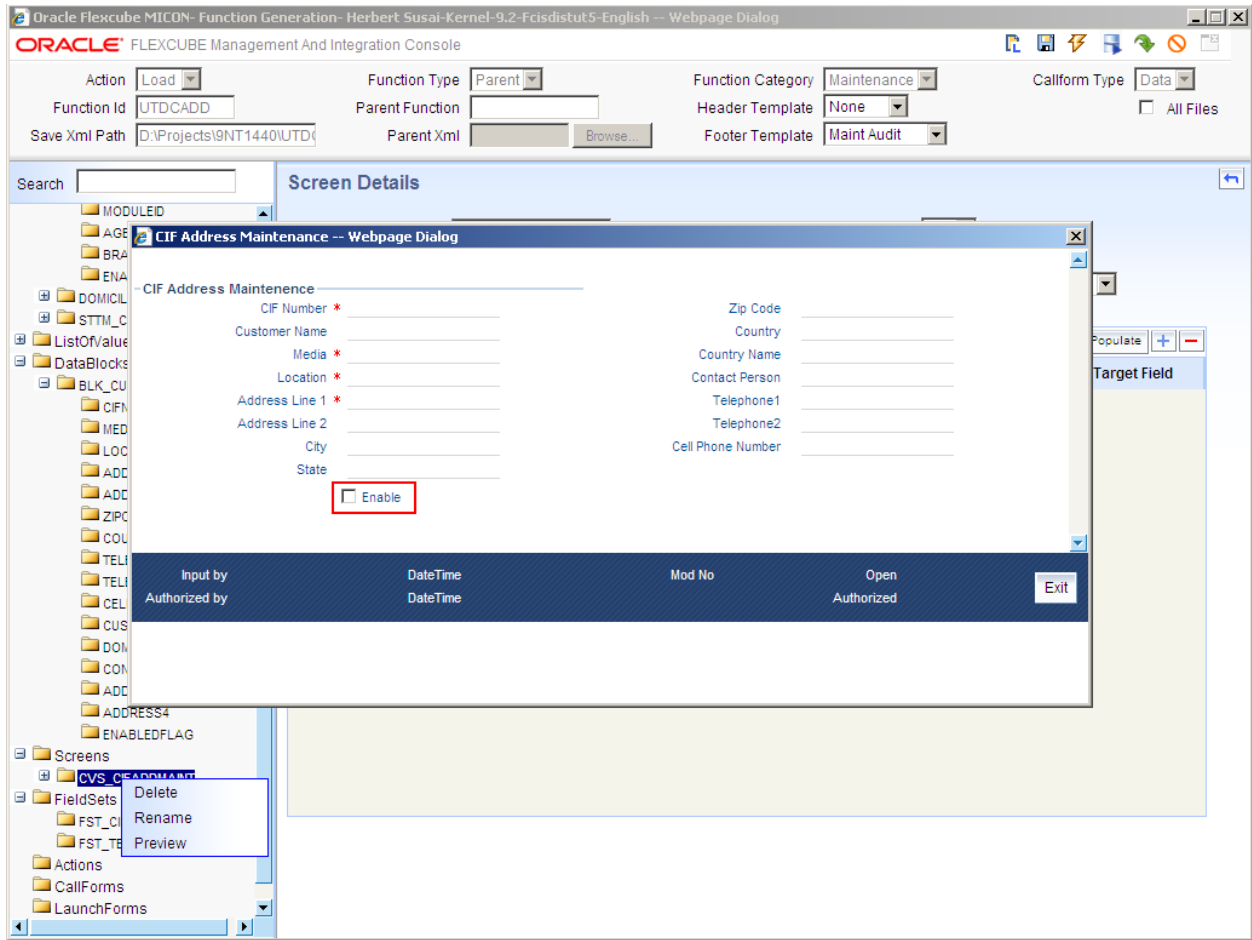
- Fieldset Name: FST\_CIFADDMAINT
- Fieldset Label: CIF Address Maintenance
- Data Block: BLK\_CUSTADD
- Multi Record: No
- View Type: Single
- Screen Name: CVS\_CIFADDMAINT
- Screen Portion: Body
- Tab Name: TAB\_MAIN
- Section Name: SEC\_1
- Partition Name: PART\_1
- Options:  Horizontal Fieldset,  ReadOnly,  Navigation Button

**Label Code -- Webpage Dialog:**

Label Code	Label Description	Label Type
<input checked="" type="checkbox"/> LBL_ENABLEDFLAG	Enable	Field Label

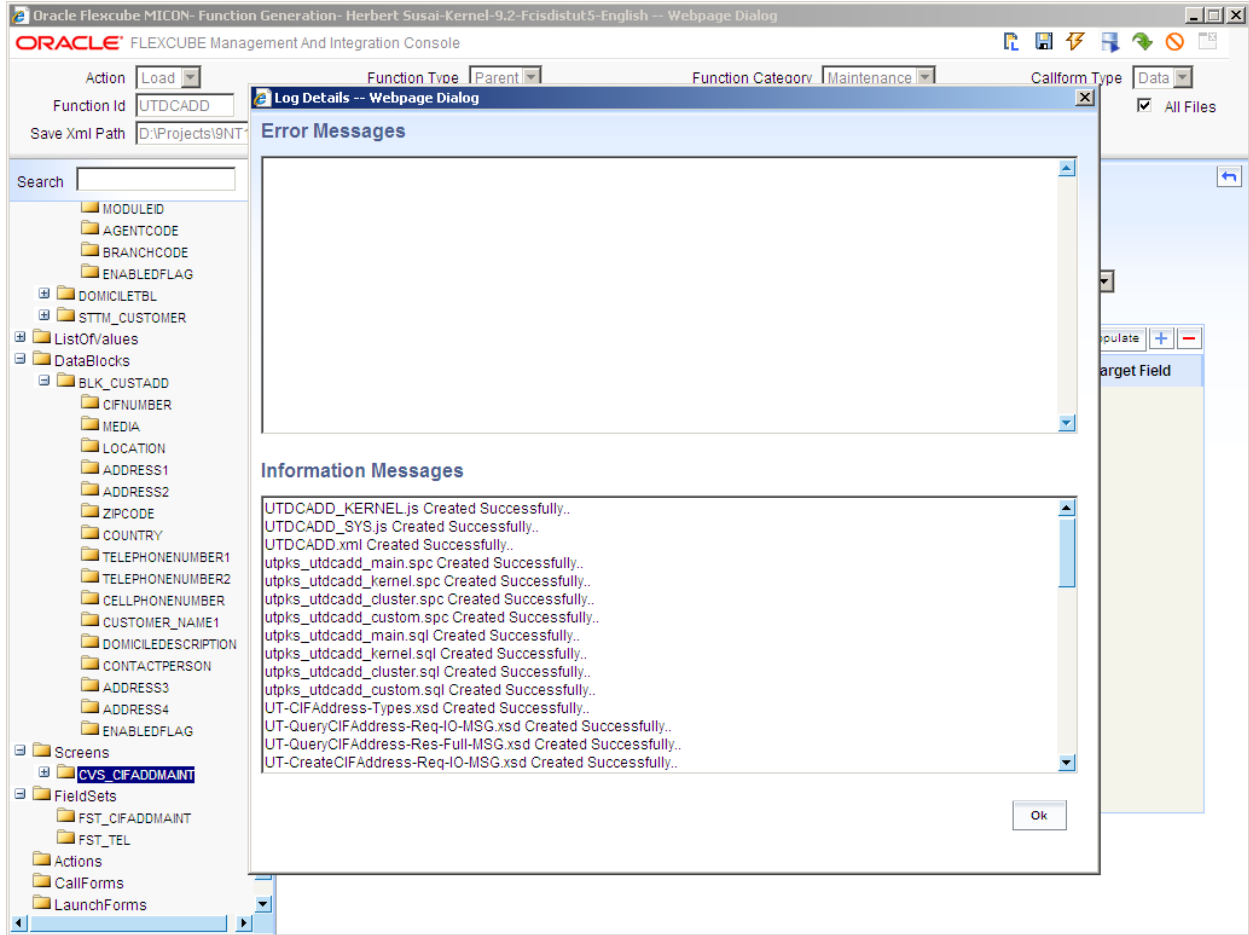


- Preview the screen



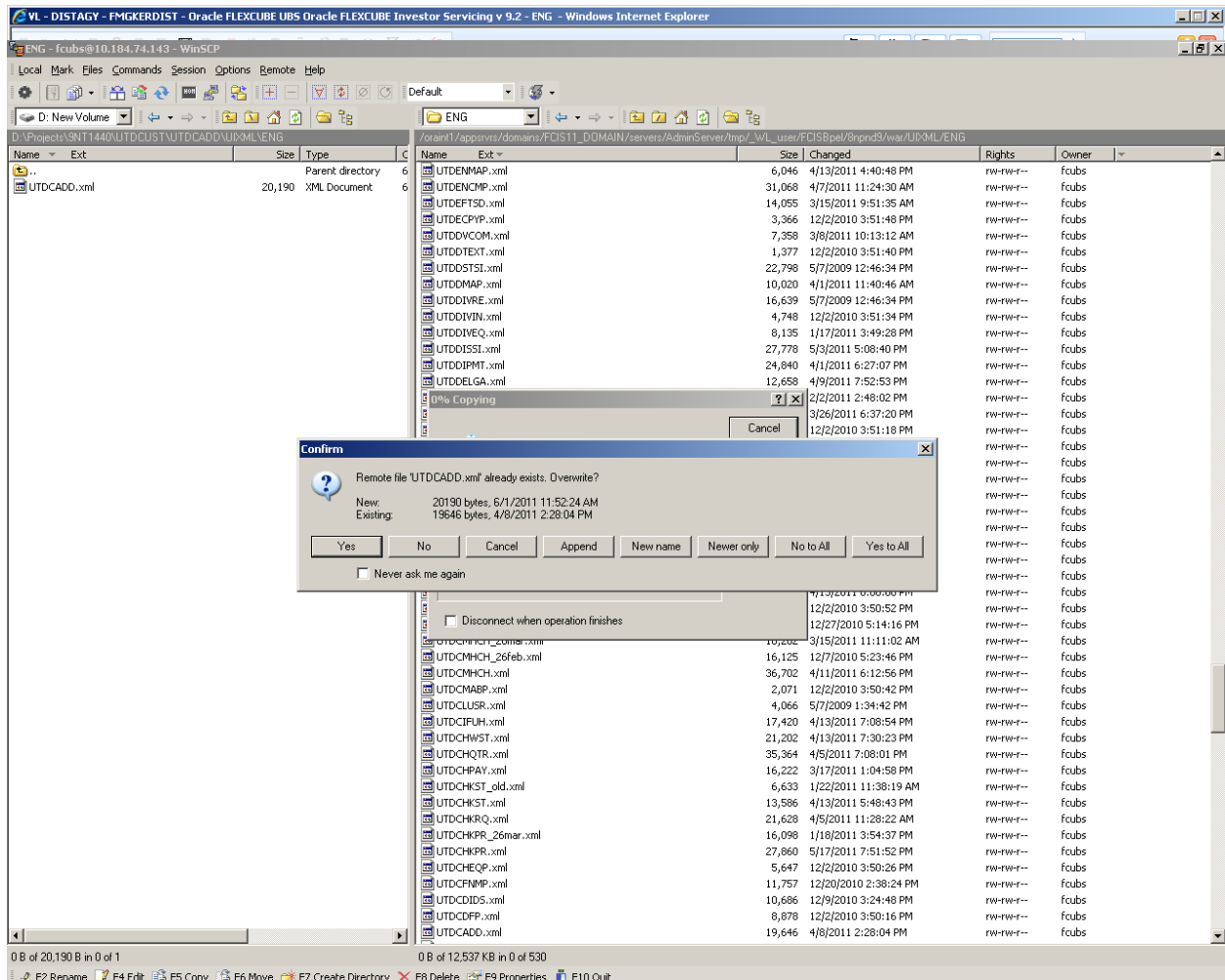
## 5.4 Generate the files

- Generate the files from RAD

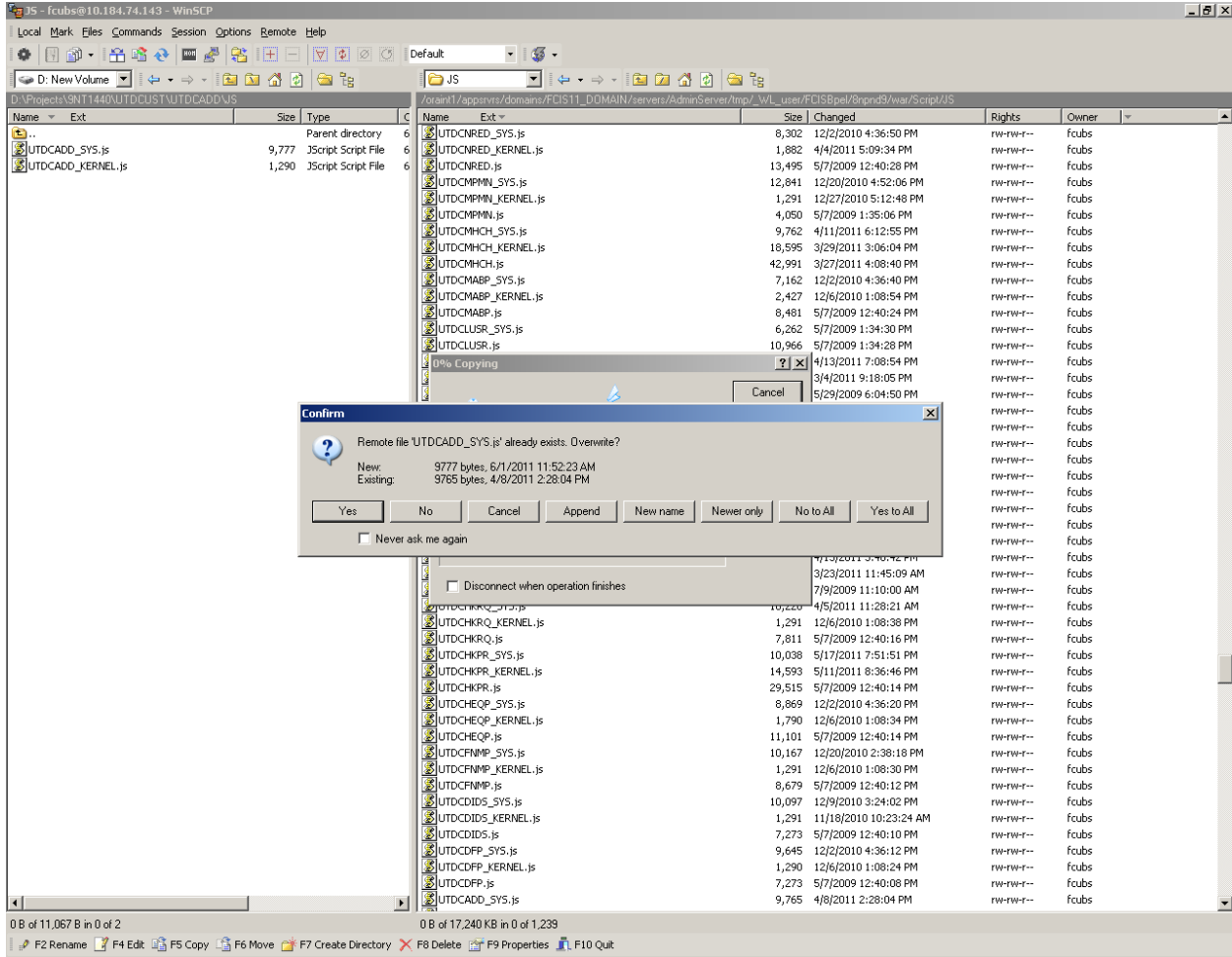


## 5.5 Deploy the files.

- Deploy the file UTDCADD.xml in the UIXML path specified



- Deploy the UTDCADD\_SYS.js in the JS path specified



## 5.6 Test the changes

- Launch the screen UTDCADD and test the changes

The screenshot displays the 'UTDCADD' screen within the Oracle FLEXCUBE Investor Servicing v 9.2 application. The interface is divided into a left-hand menu and a main content area. The menu on the left lists various system functions, with 'CIF Address' expanded to show 'Detail' and 'Summary' options. The main content area is titled 'CIF Address Detail' and contains a form for maintaining address information. The form includes the following fields:

- CIF Number \*
- Customer Name \*
- Media \*
- Location \*
- Address Line 1 \*
- Address Line 2
- City
- State
- Zip Code
- Country
- Country Name
- Contact Person
- Telephone1
- Telephone2
- Cell Phone Number

An 'Enable' checkbox is located below the 'State' field and is highlighted with a red rectangular box. At the bottom of the form, there is a table for user information and a 'Cancel' button.

Input by	DateTime	Mod No
Authorized by	DateTime	Open
		Authorized

Cancel

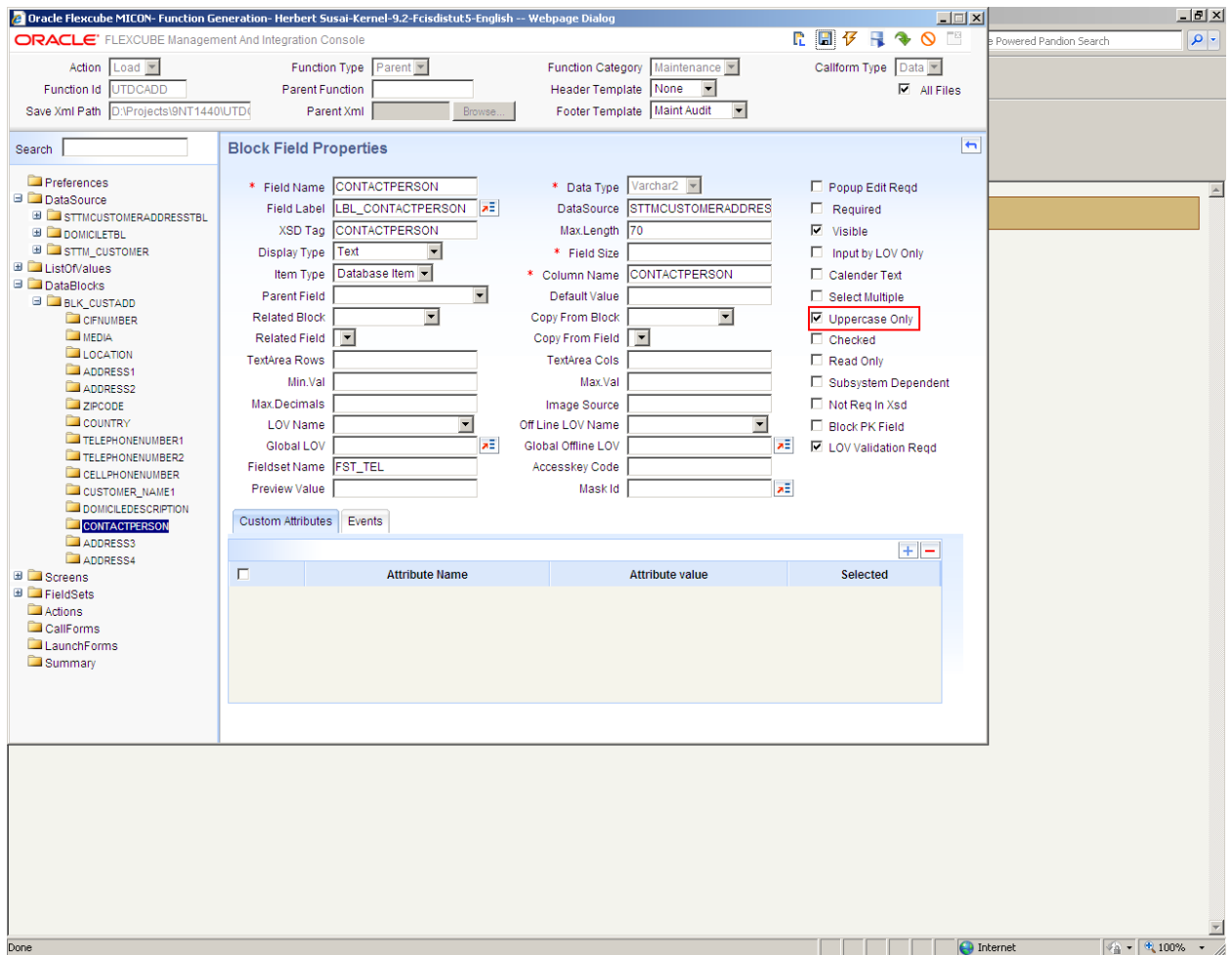
## 6 Call out Extensibility - Add Validations

### 6.1 Extensibility Requirement description

- Add validation at the custom package to ensure the Contact Person name is given in CAPITAL letters

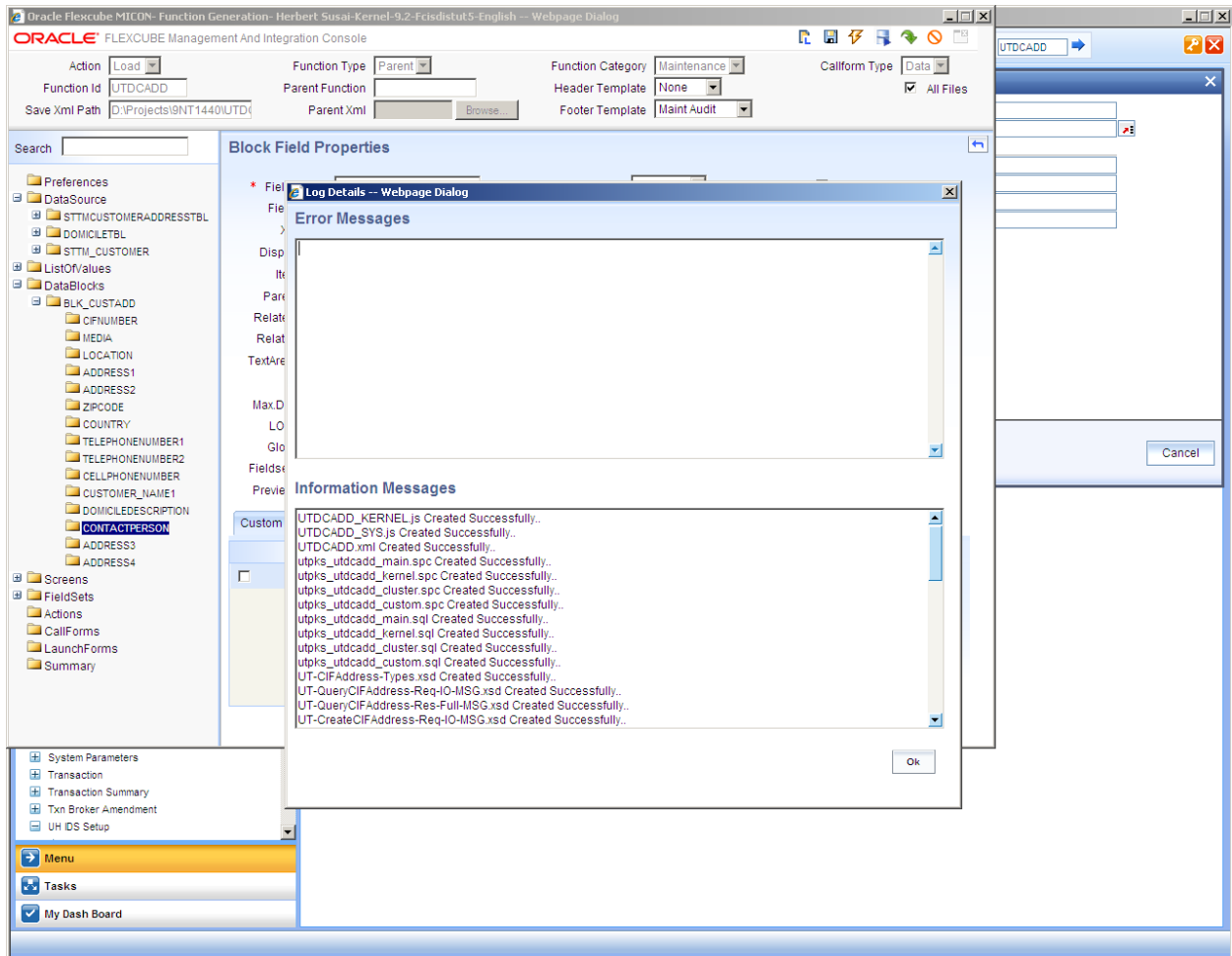
### 6.2 RAD changes specifications

- Add validation for Contact Person Field.



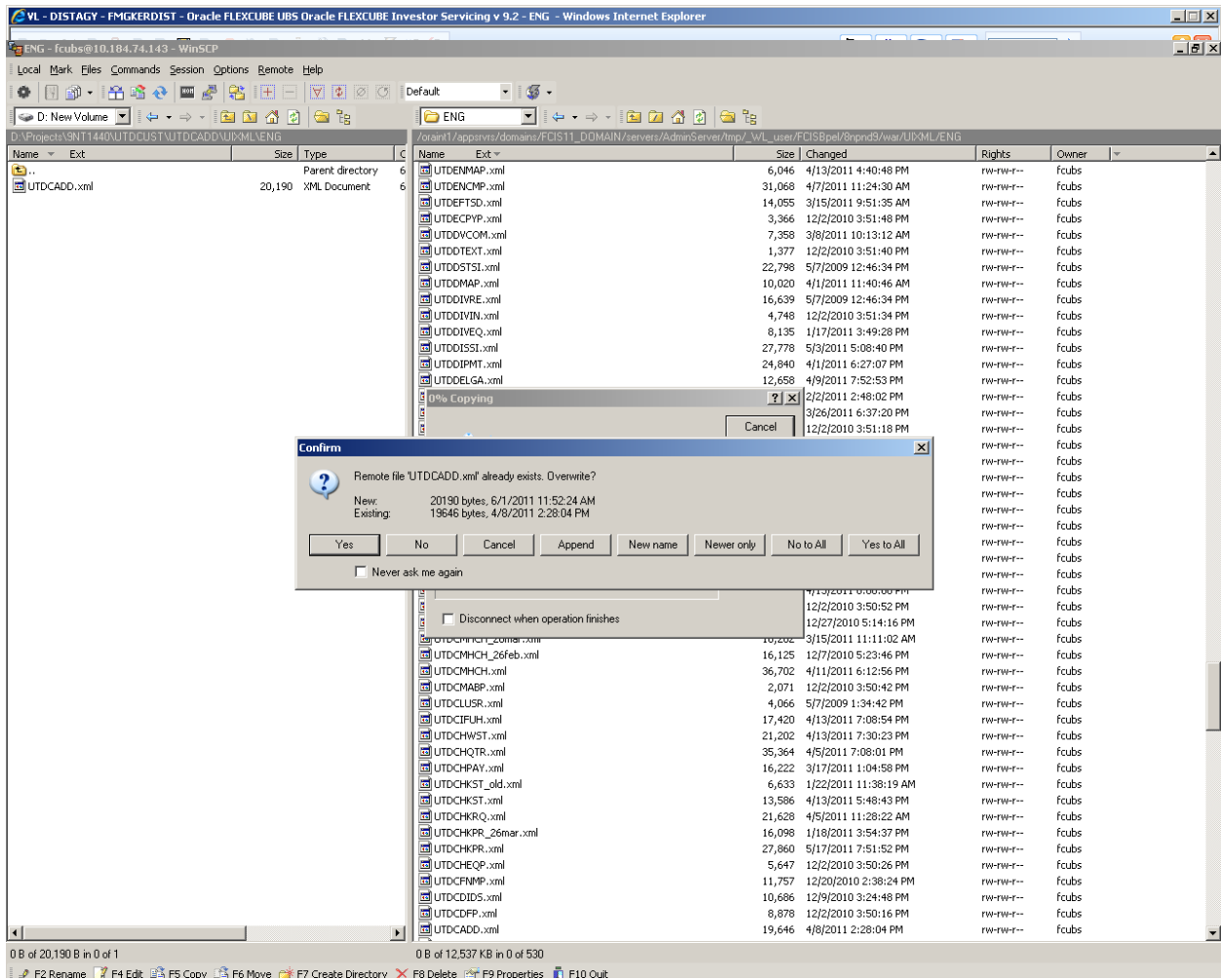
## 6.3 Generate the files

- Generate the files from RAD



## 6.4 Deploy the files

- Deploy the files into target FLEXCUBE IS environment
- Deploy the file UTDCADD.xml in the UIXML path specified

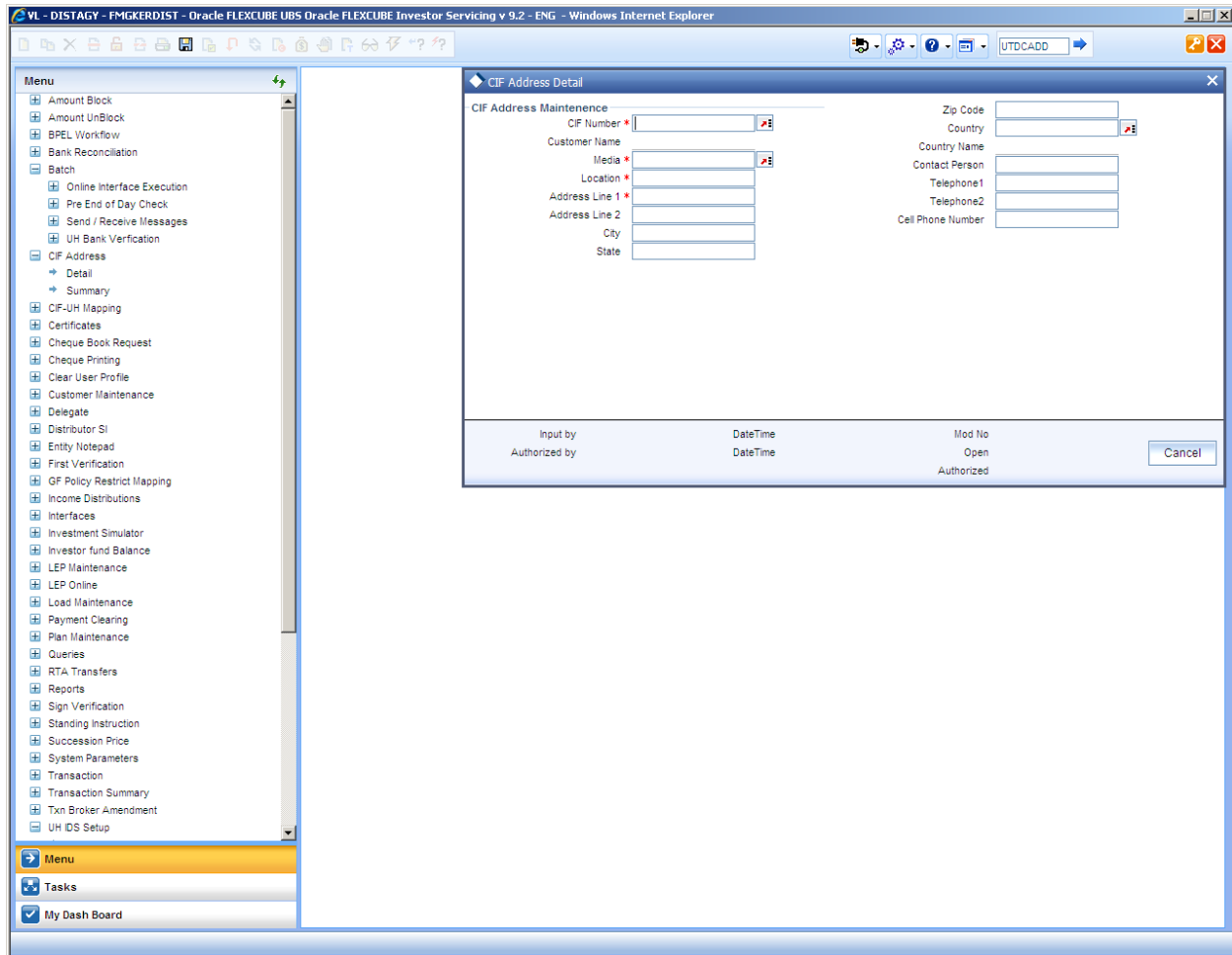






## 6.5 Test the changes

- Launch the screen UTDCADD function screen



## 6.6 Add CAPITAL Letter validation

- Open the utpks\_utdcadd\_kernel.Fn\_Pre\_Default\_And\_Validate function and add the below code.

```

                Dbg('In Fn_Pre_Default_And_Validate..');
    IF p_wrk_utdcadd.v_sttmcustomeradresstbl. CONTACTPERSON NOT IN
    (upper(p_wrk_utdcadd.v_sttmcustomeradresstbl. CONTACTPERSON))
    THEN
    p_err_code      := 'ST-OTHR-097';
    p_err_params    := NULL;
    return FALSE;
    END IF;
    Dbg('Returning Success From fn_pre_default_and_validate..');

```

```

PL/SQL Developer - FCISdistut5@KERDEV2 - [Program Window - Edit source of package UTPKS_UTDCADD_KERNEL@KERDEV2]
File Project Edit Session Debug Tools Macro Documents Reports Window Help

My objects
Recent objects
Functions
Procedures
Packages
Package bodies
Types
Type bodies
Triggers
Directories
Tables
Views
Synonyms
Tablespaces

Variables
Dbg
Pl_Log_Error
Pl_Skip_Hand
Fn_Post_Build
Fn_Pre_Check
Fn_Pre_Chec
Fn_Pre_Defau
Fn_Pre_Upload
Fn_Pre_Upload
Fn_Pre_Queue
Fn_Post_Queue

FUNCTION Fn_Pre_Default_And_Validate(p_Source IN VARCHAR2, p_Source_Operation IN VARCHAR2, p_Function_Id IN VARCHAR2, p_Action_Code IN
RETURN BOOLEAN IS
BEGIN
    Dbg('In Fn_Pre_Default_And_Validate..');
    IF p_wrk_utdcadd.v_sttmcustomeradresstbl. CONTACTPERSON NOT IN (upper(p_wrk_utdcadd.v_sttmcustomeradresstbl. CONTACTPERSON))
    THEN
    p_err_code      := 'ST-OTHR-097';
    p_err_params    := NULL;
    return FALSE;
    END IF;
    Dbg('Returning Success From fn_pre_default_and_validate..');
    RETURN TRUE;
EXCEPTION
WHEN OTHERS THEN
    Debug.Pr_Debug('***, 'In When Others of utpks_utdcadd_Kernel.Fn_Pre_Default_And_Validate ...');
    Debug.Pr_Debug('***, SQLERRM);
    p_err_code      := 'ST-OTHR-001';
    p_err_params    := NULL;
    RETURN FALSE;
END Fn_Pre_Default_And_Validate;

FUNCTION Fn_Post_Default_And_Validate(p_Source IN VARCHAR2, p_Source_Operation IN VARCHAR2, p_Function_Id IN VARCHAR2, p_Action_Code IN
RETURN BOOLEAN IS
tValidChars1 VARCHAR2(100) := 'ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz1234567890,-# ' --STR 12344682 Lavanya M change
tValidChars3 VARCHAR2(100) := '#-1234567890';
tValidChars2 VARCHAR2(100) := ' ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz'; --Lavanya M str 313 Ut round
tMakerId      sttmcustomeradresstbl.maker_id type;
BEGIN
    Dbg('In Fn_Post_Default_And_Validate..');
    Dbg('Returning Success From Fn_Post_Default_And_Validate..');
    --Srikanth Starts, FCIS 9.2 16-Aug-2010
    --Adding Validation
    For i in 1 .. length(p_utdcadd.v_sttmcustomeradresstbl.LOCATION) Loop
        If Not
            Instr(tValidChars1, Substr(p_utdcadd.v_sttmcustomeradresstbl.LOCATION, i, 1)) > 0 Then
            p_err_code := 'E-INVLOCATION';
            p_err_params := '';
            RETURN FALSE;
        End If;
    End Loop;
    dbg('reached here!');
    For i in 1 .. length(p_utdcadd.v_sttmcustomeradresstbl.ADDRESS1) Loop
        If Not
            Instr(tValidChars1, Substr(p_utdcadd.v_sttmcustomeradresstbl.ADDRESS1, i, 1)) > 0 Then
            p_err_code := 'E-INVALID';
            p_err_params := ' Character '||Substr(p_utdcadd.v_sttmcustomeradresstbl.ADDRESS1, i, 1)||' For Address Line 1';--sweta SQR change
            pr_log_error('UTDCADD', t_source, p_err_code, p_err_params);
            pkError := FALSE;
            EXIT;
        End If;
    End Loop;
    IF NOT p_utdcadd.v_sttmcustomeradresstbl.ADDRESS2 IS NULL THEN
        For i in 1 .. length(p_utdcadd.v_sttmcustomeradresstbl.ADDRESS2) Loop
            If Not

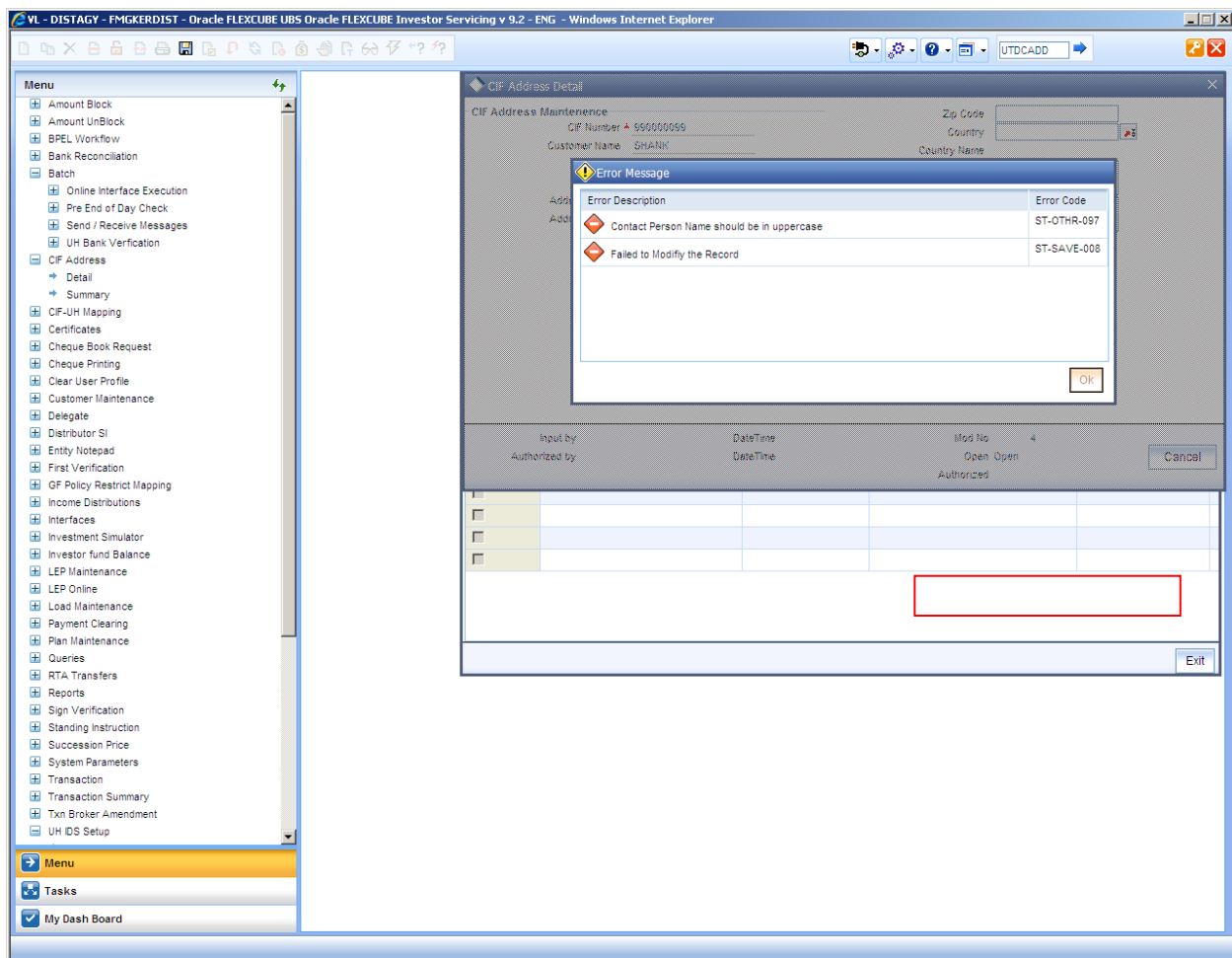
```

- Maintain the error code ST-OTHR-097 in ERTB\_MSGS

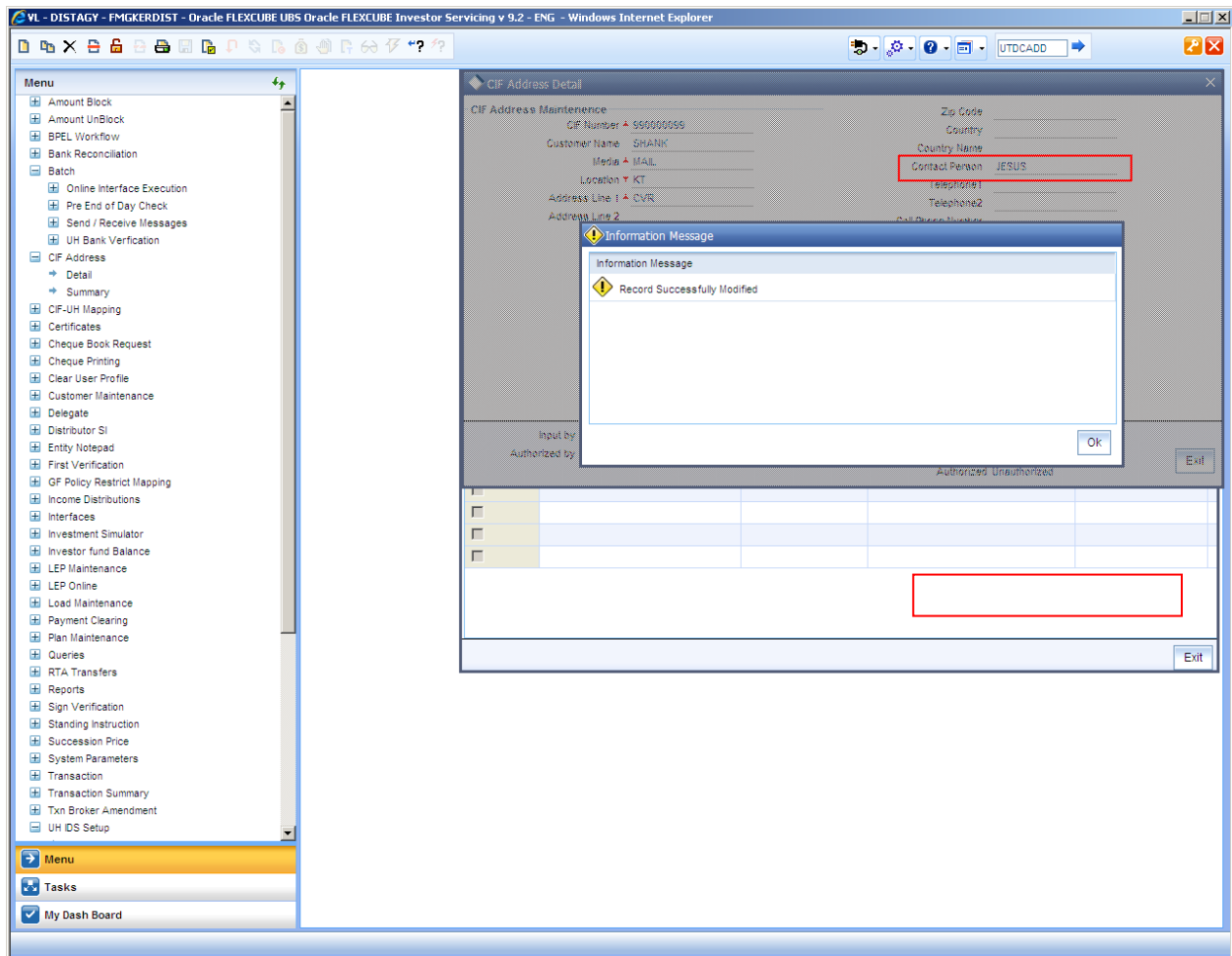
ERR_CODE	LANGUAGE	MESSAGE	TYPE
ST-OTHR-097	ENG	Contact Person Name should be in uppercase	E

## 6.7 Test CAPITAL Letter validation

- Test the Cacontact Person name with lower case and check the error returned



- Test the card holder name with UPPER case and ensure record saves.



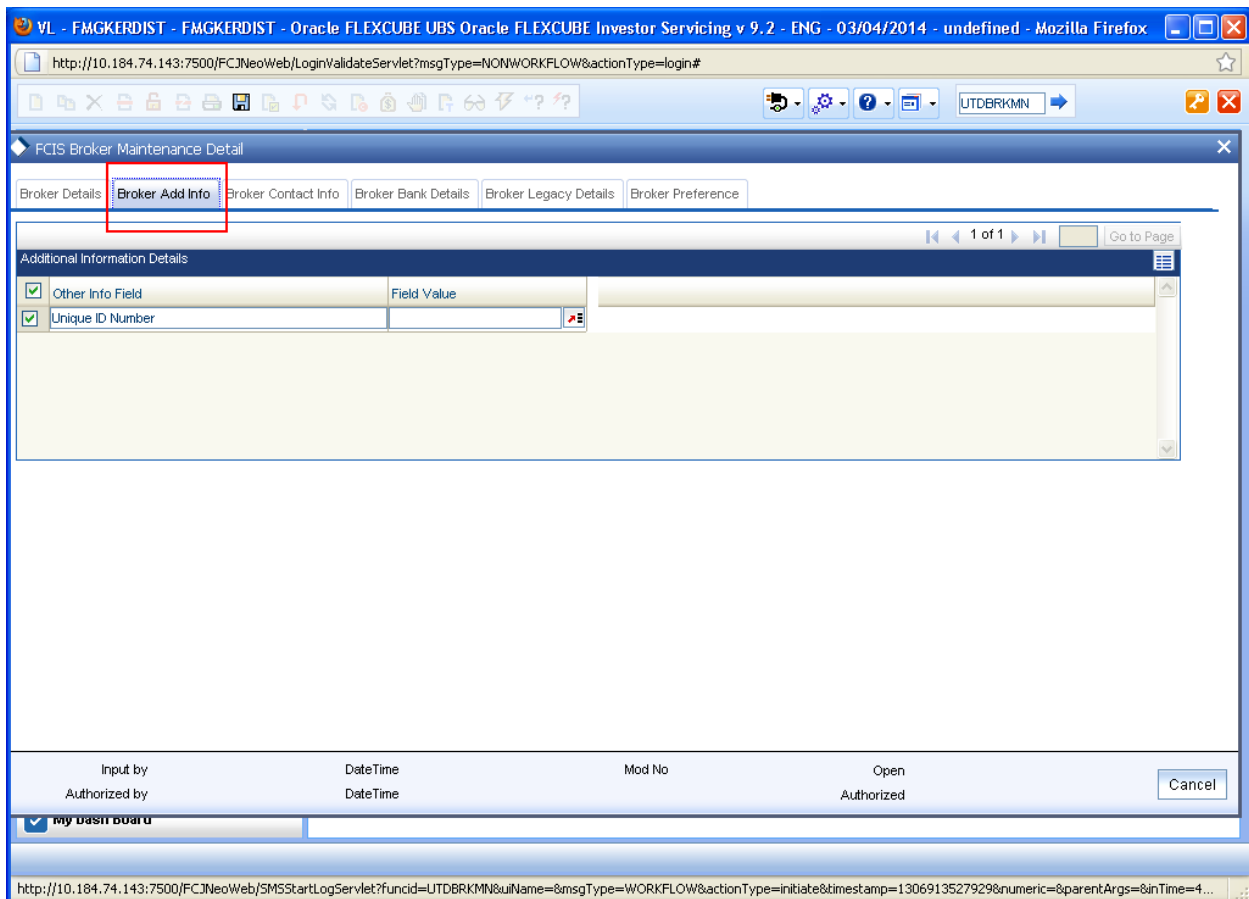
## 7 Adding an Additional information

### 7.1 Extensibility Requirement description

- Add Additional Information (Add Info) called “UID (Unique ID Number)” to reflect alternate name of the customer in UTDBRKMN
- There should not be any database table change (add columns) to achieve this addition.

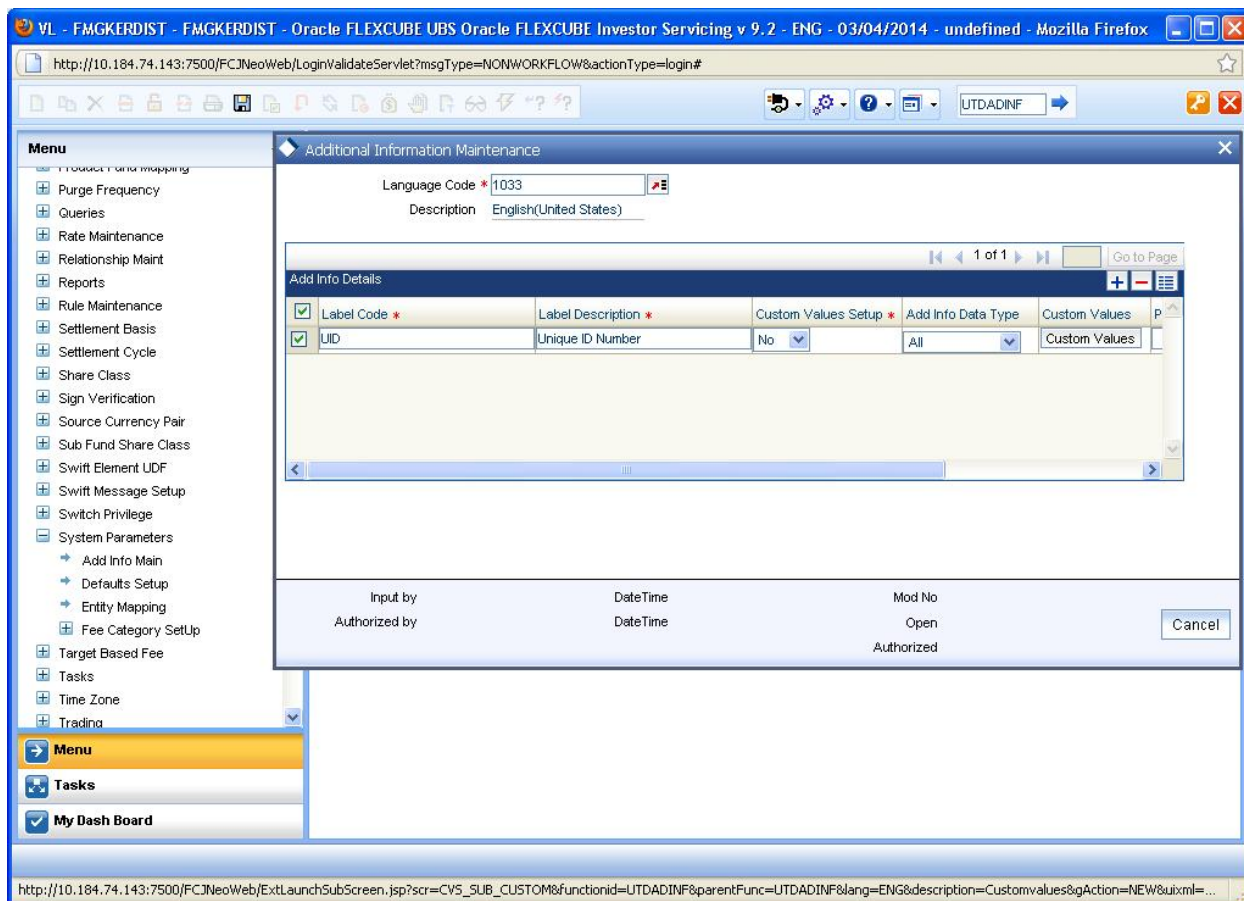
Note:

*Additional Information for a given function ID can be accessed using Tab “Add Info” as shown in below picture.*



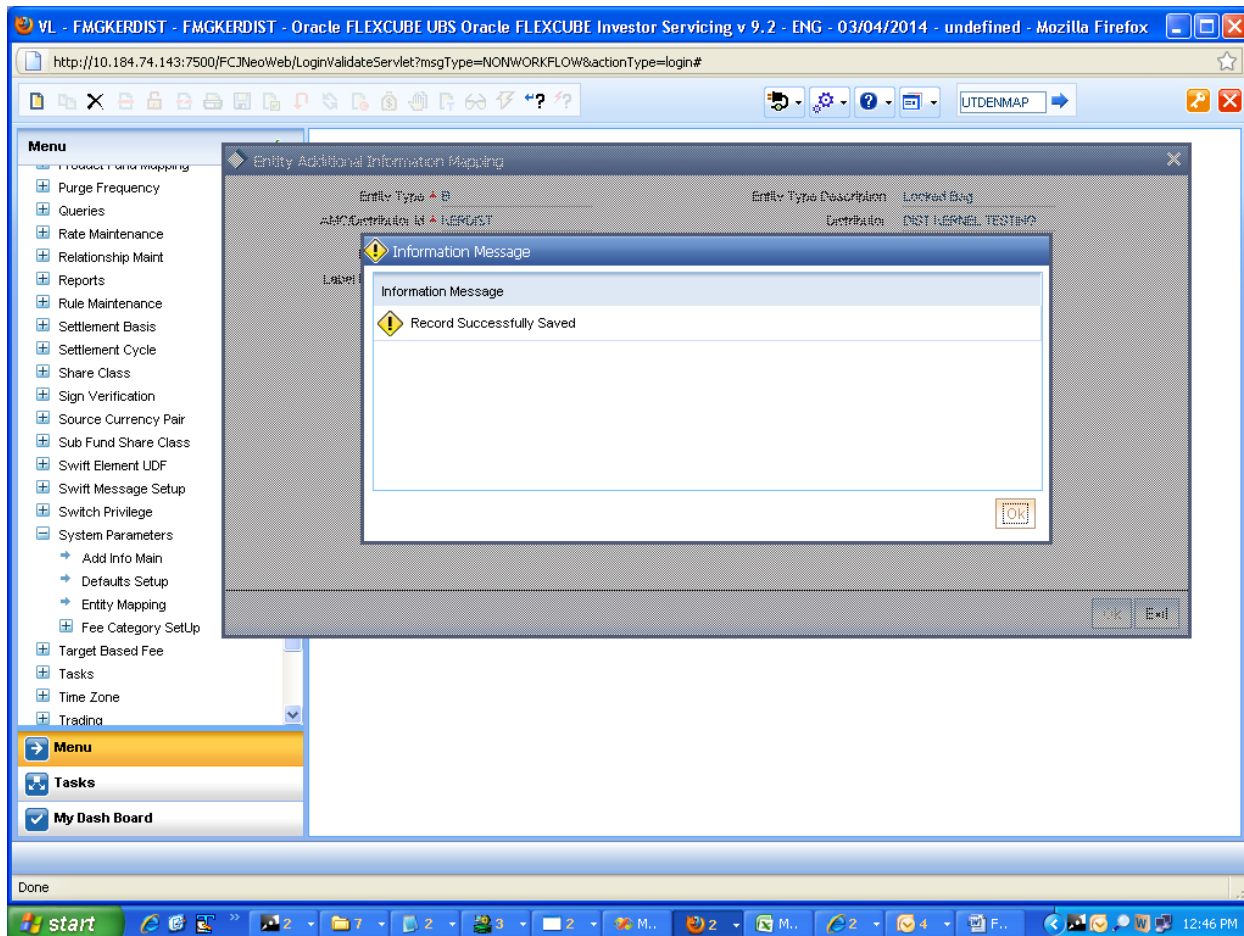
## 7.2 Add Additional Information UID using UTDADINF

- Launch FLEXCUBE IS
- Launch UTDADINF function ID
- Create Additional Information – “UID(Unique ID Number)” as shown in below picture



### 7.3 Map Additional Information UID with UTDBRKMN using UTDENMAP

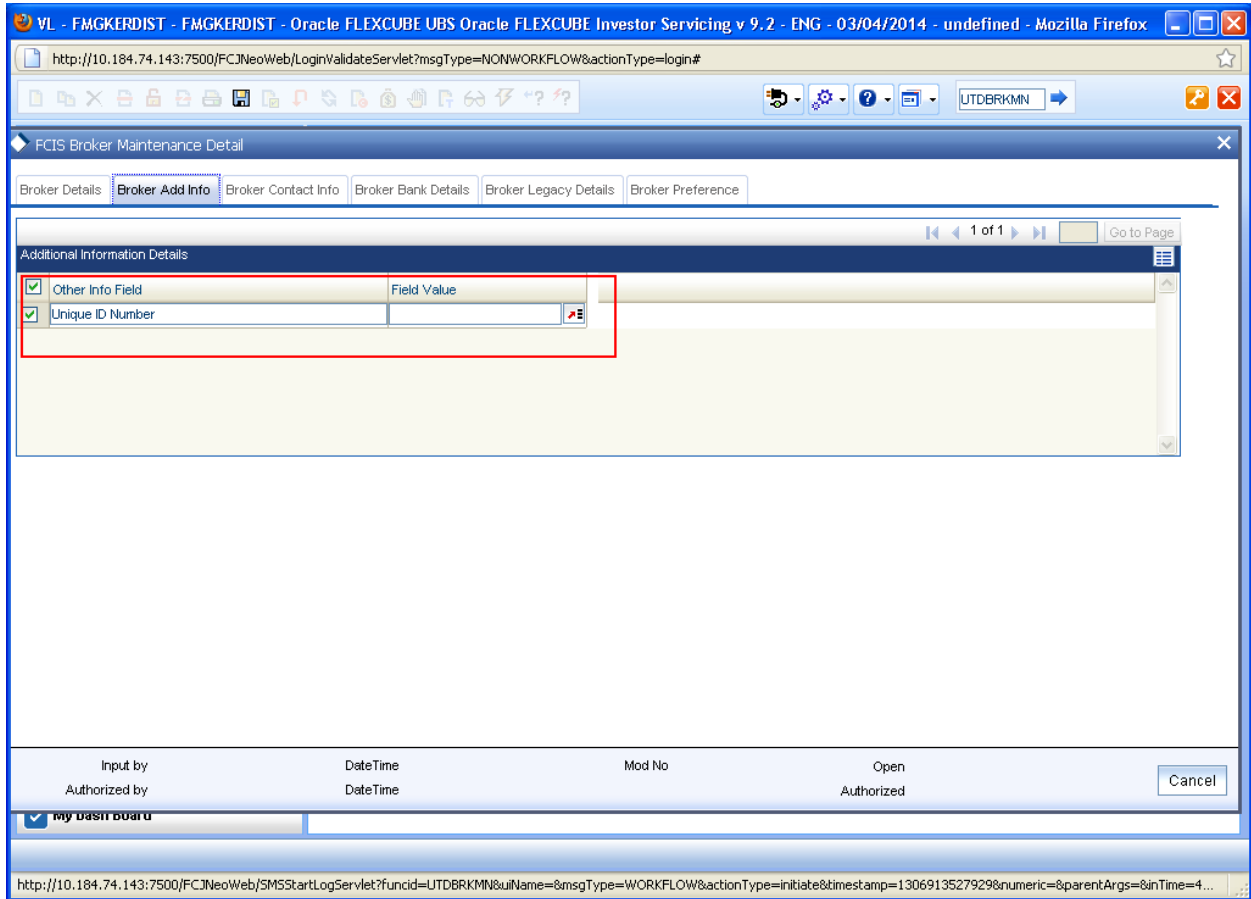
- Launch UTDENMAP to map the UDFs with Function ID
- Map Create Additional Information - "UID" with UTDBRKMN as shown in below picture



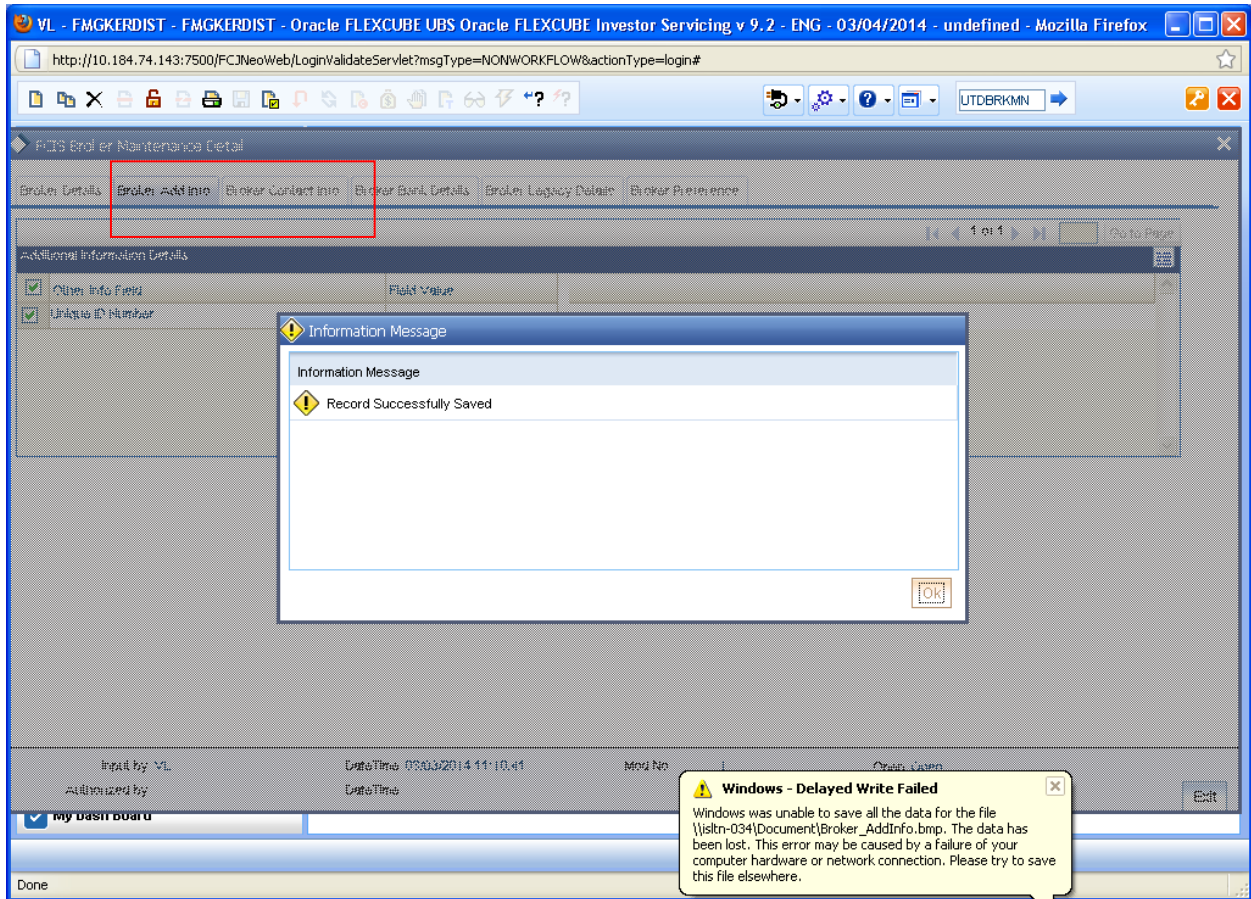


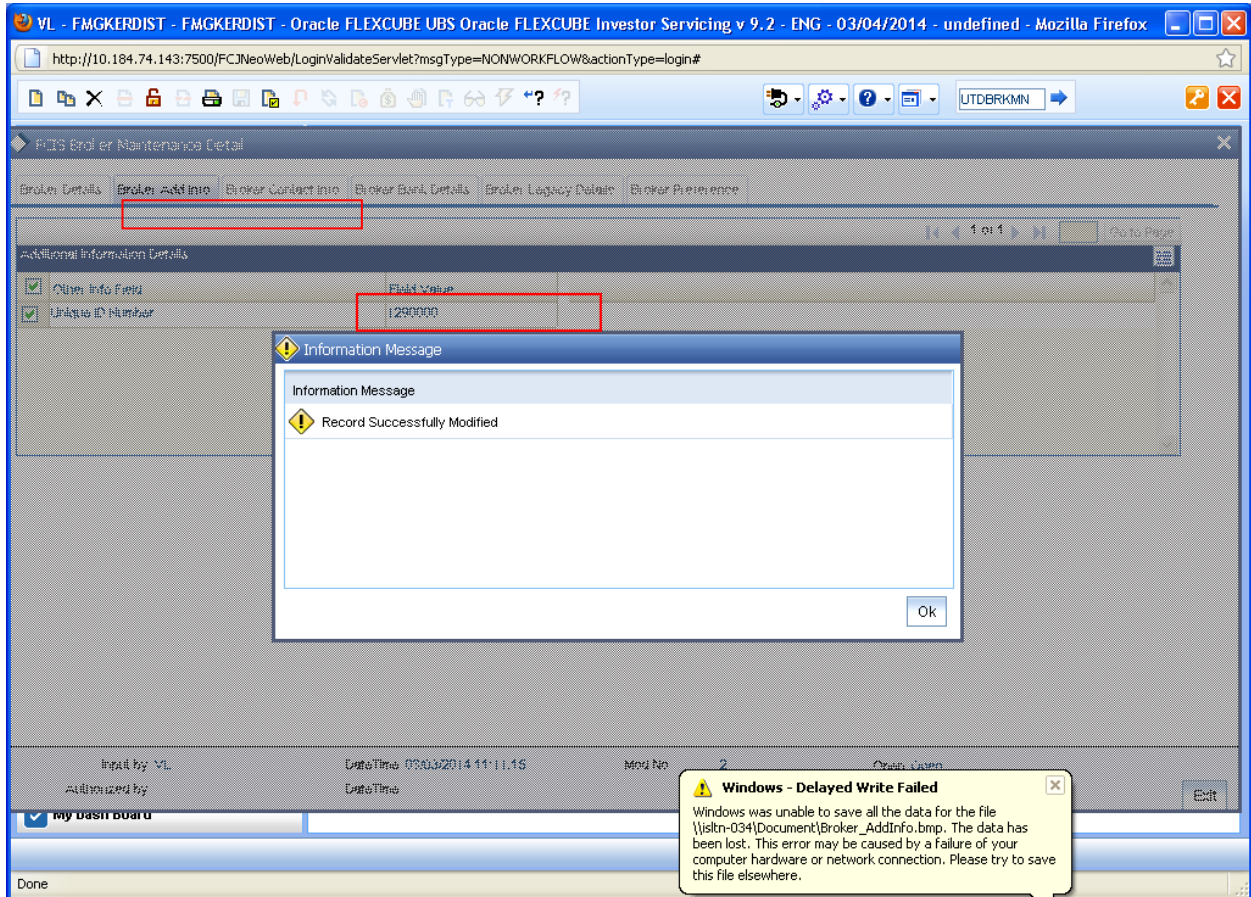
## 7.4 Test Additional Information created in UTDBRKMN

- Launch UTDBRKMN and select “Broker Add Info” Tab.



- Ensure “UID (Unique ID Number)” Additional Information is shown as below
- Enter the value for this field and save Broker record.







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