Development Workbench – Screen Customizer Oracle FLEXCUBE Universal Banking Release 12.2.0.0.0



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1 Preface

This document describes the Screen Customizer functionality available in Oracle FLEXCUBE Development Workbench for Universal Banking and guides the developers on how to use this feature.

1.1 Audience

This document is intended for FLEXCUBE Application developers/users that use Development Workbench to develop various FLEXCUBE components.

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

| Proficiency | Resources |
|--|-------------------------------|
| FLEXCUBE Functional Architecture | Training programs from Oracle |
| | Financial Software Services. |
| FLEXCUBE Technical Architecture | Training programs from Oracle |
| | Financial Software Services. |
| FLEXCUBE Object Naming conventions | Development Overview Guide |
| Working knowledge of Web based applications | Self Acquired |
| Working knowledge of Oracle Database | Oracle Documentations |
| Working knowledge of XML files | Self Acquired |
| Working Knowledge of Oracle FLEXCUBE Development Workbench for Universal Banking | User Manuals |

1.2 Related Documents

04-Development_WorkBench _Screen_Development-I.docx 05-Development_WorkBench _Screen_Development-II.docx

2 Introduction

This document gives information about the following topics:

- <u>Chapter 2 , "Introduction"</u>
- Chapter 3 , "Screen Customizer"
- <u>Chapter 4</u>, "File Generation"

3 Screen Customizer

The Oracle FLEXCUBE Development Workbench Screen Customizer allows users to do UI changes on a screen. If only the screen layout of the function id has to be modified, developer can use the Screen Customizer feature rather than Function Generation feature.

Only the screen layout changes and UI field properties will be allowed to change in the Screen Customizer

Note : Only Load action is possible in Screen Customizer.

Only three nodes will be present in Screen Customizer as shown in the figure

| creen Customization | | |
|---------------------------|----------------------|---------------------------------|
| | | 🖬 🗷 🗏 🐬 🌘 |
| Action Load 👻 | Function Type Parent | Function Category Maintenance - |
| Function Id STDCIF | Parent Function | Header Template None |
| Save XML Path STDCIF_RAD. | BROWSE Parent Xml | Footer Template Maint Audit 🚽 |
| arch | | |
|) 🚞 DataBlocks | | |
| Creens Screens | | |
| i FieldSets | | |
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Fig 3.1: Screen Customizer Screen

3.1 DataBlocks

Data Block properties would not be allowed to change in Screen Customizer. New Data Blocks and Block Fields also cannot be added. Deletion/Renaming of blocks and fields are also not allowed in Screen Customizer

3.1.1 Data Block Field

| Screen Customization | | | | - |
|---|---|---|--|---|
| | | | | 🖫 🗙 🗏 🔗 🧐 |
| Action Load Function Id STDCIF Save XML Path STDCIF_RAD. | Function Type Parent Parent Function BROWSE Parent Xml Block Field Properties | • | Function Category Main Header Template None Footer Template Main | • |
| DataBlocks BLK_CUSTORER BLK_CUSTPERSONAL BLK_CUSTCORP BLK_CUSTCORPIR BLK_CUSTCOCPOIR BLK_CUSTCOC-CHKLIST BLK_CUSTCOC-CHKLIST BLK_CUSTCRP BLK_CUSTSHHOLD BLK_CUSTSHHOLD BLK_CUSTSHHOLD BLK_CUSTPERF BLK_CUSTPERF BLK_SUBERDET BLK_SUBER | Field Name * FLDNAM Field Label LBL_FLDNAM DataSource STWWS_CUST_LIAB_UDF Column Name + FIELD_NAME Data Type * Varchar2 * Display Type Text * Display Type Text * Parent Field * Related Field * LOV Name Off Line LOV Name Fieldset Name FST_LIAB_UDF Custom Attributes Events Related Field | XSD Tag XSD Anotation Field Size ' Maximum Length Minimum Value Maximum Value Maximum Value Maximum Value Maximum Value TextArea Columns TextArea Columns Default Value * * * | FLDNAM | Required Visible Read Only Calender Text Popup Edit Required Uppercase Only LOV Validation Required Input by LOV Only Not Required In Xsd Report Parameter |
| BLK_LIAB_SCORE BLK_LIAB_LINKAGE BLK_LIAB_LINKAGE BLK_LIAB_LINKAGE BLK_LIAB_LINKAGE FLDVAL FLDVAL DATATYP VALTYP BLK_CUSTSEGMENT Screens FieldSets | Fig 3.1.1: Data Bloc | Attribute Value | Active | Position |

User will be allowed to change below properties at data block field level.

- Display Type
- Field Size
- Preview Value
- Popup Edit Required
- Visible
- Upper Case only
- Read Only

3.2 Screens

All the actions can be performed in the Screen level. Developer can add, modify, delete, and rename the screens, tabs and sections.

Note that deletion and renaming will be allowed only if the element is created in the working release.

3.3 FieldSet

| creen Customization | | | | | | | | |
|---------------------------|--|---|-----|---|---|--|----------------------------------|---|
| | | | | | | | | 🖫 🗶 🗏 🞸 🤤 |
| Action Load 👻 | | Function Type Paren | t 👻 | | | Function | Category Maintenance | • |
| Function Id STDCIF | | Parent Function | | | | Header | Template None - | |
| Save XML Path STDCIF_RAD. | BROWSE | Parent Xml | | | | Footer | Template Maint Audit | - |
| arch | Fieldset Prop | erties | | | | | | - <u>A</u> |
| | Fieldset L Data E Multi Re View Fieldset H | ame FST_HEADER1 abel Slock BLK_CUSTOMER cord No ~ Type Single ~ | | Scree T: Sectiv Partitiv Number | en Name n Portion ab Name on Name Of Rows | CVS_MAIN Header TAB_HEADER SEC_1 PART1 | ▼ ▼ ▼ Subpartition Name | ☐ Horizontal Fieldset ☐ ReadOnly ☐ Navigation Button ☑ Visible |

Fig 3.3.1: Field sets in Screen Customizer

In fieldset developer can change screen properties, display type from Vertical to Horizontal, read-only property etc. *Data Block to which field set is attached cannot be changed*.

Field set fields can be re arranged as per requirement.

4 Generated Units

Development Workbench will generate only UI related units in Screen Customizer 1. Radxml

2. Screen Xml (i.e. Lang Xml)

3. System JS (JavaScript File)

Deploy language xml and system JavaScript file in FLEXCUBE application server to reflect the changes done to the function id in Screen Customizer

| Screen Cust Generate | omizatio | 0 | | | | | | | | | | | | | | | | | | | 8 | 4 🔳 1 | 7 🍕 4 |
|-------------------------|-----------|-------|----------|------------|------------------------|----------------------|-----------------|--------------------------|---|--|----------|-----------------------|---|--------------|---------|--|---|-----|-------------|--|---|------------|-----------|
| | Front-End | Files | | | System Pa | aokages | | | Hook | Paokages | | | | | Meta Da | a | | | | | Others | | * |
| Screen | n Xrril | | | Main P | stion Trigi Package | ody gers ⊱Spec | | Chu Chu Chu Chu | mel Pack: ister Pack ister Pack stom Pac | age Spec age Body age Spec age Body kage Spe kage Bod | c | Da LO Blo Sc | nu Detail Iasource V Delails ock Detail reen Dela sendable | Details S | | Label Det Block PK Function (Gateway I Notification Function I | Columns Call Form Details in Details | IS | 0 0 0 | ed Wilh A creen Htt pload Ta pload Ta | nnotations ni ble Trigge bles Delini ble Delini | r ilion | |
| | | | | | | | Informat | tion | | | | | | | | | | × | | | | | |
| | No | | | | | | | | En | ror Desci | ription | | | | E | rror Code | e | ^ | | | tatus | | |
| 1 | | STE | CIF.xml | | | | | Req | lest succ | cessfully | Processe | ed | | | R | D-SAVE- | 007 | | | | URIUS | | |
| 2 | | | CIF SYS | Lis | | | | | | | | | | | | | | | | | - | | |
| 3 | | STE | ICIF_RAD |).xml | | | | | | | | | | | | | | | Genera | | • | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | | | | | | | | Gene | rate | Exit |
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| | | | | | | | | | | | | | | | | | | | | | | | |
| | | D | o you wa | nt to open | or save F | RAD.ZIP f | rom 10.1 | 84.132.10 | 0? | | | | | | | Open | | ave | • | ancel | × | | |

Fig 4.1: Generation of files in Screen Customizer

5 Examples

Example 1:

Requirement: Hide a Field in the screen

Below screenshots shows how Screen Customizer can be used for this purpose.

| ◆ Customer | | | × 🖬 🗶 🗏 1 |
|---|---|---|-------------|
| 🕞 New 🔄 Enter Query | | | Ţ |
| Type 💿 Individual | Full Name | Customer Category * | |
| Corporate | Short Name * | Private Customer | |
| S 💿 Bank | Branch Code | | |
| Customer No * | | | - <u>A:</u> |
| la Personal Corporate Additional Director Auxilia | ary Check List | | |
| Per Domicile Address | Status | Identifier | |
| C1 | | | |
| C\ Same as Permanen Address | | Name | |
| Address 1 | Deceased | Value | |
| Address 2 | Whereabouts U | - Relationship Manager | |
| CV Address 3 | Eligible for AR-A | P RM ID | + |
| Address 4 | Tracking | RM Name | |
| CV Pin Code | CRM Customer Mailers Require | d a transformer | eld Active |
| C Country | CLS Participant | | E 👻 Yes 💌 |
| | Issuer Custome | Auto Generated Statem Plan | ient Yes 👻 |
| Misc Details | Treasury Custor | _ | |
| SWIFT Code | Joint Customer | Statement Day | |
| CV Credit Rating | MT920 | Statement Day | |
| C\ Group Code | Relationship Pri | cipa | |
| Charge Group | ✓ ELCM Custome | | |
| Clearing Group | ELCM Customer | | |
| Tax Group | Number | | |
| Exposure | CIF Status | | |
| Exposure Category | Since | | |
| Customer | | | |
| Classification External Reference | | | |
| Number | | | |
| Location | | | |
| FX Netting Customer | | | |
| Media | | | |
| SSN | | | * |
| Group MIS Joint Standing Instructions | Linked Entities Text Fields Image I | Limits CLS Restrictions MT920 Domestic Professi | onal 🛋 |
| Issuer Cards Linked Account KYC De | tails Joint Venture Account Details NSF Bla | ck list status Documents Change Log | |
| Maker | Date Time: Mod | | |

Fig 3.3.1: A preview with 'Whereabouts Unknown' checkbox set as visible

If *Whereabouts Unknown* field is not required, uncheck the visible flag.

| reen Customization | | | |
|-------------------------|----------------------------------|---------------------------------|--------------------|
| | | E | i 🛛 🗉 🎸 🍯 |
| Action Load - | Function Type Parent | Function Category Maintenance 👻 | |
| Function Id STDCIF | Parent Function | Header Template None | |
| Save XML Path STDCIF_RA | D. BROWSE Parent Xml | Footer Template Maint Audit | |
| arch | Block Field Properties | | |
| ADDRLN3 | A | | |
| addrln2 | Field Name * WHRUNKN | Xob Tug | Required |
| ADDRLN4 | Field Label LBL_WHRUNKN | XSD Annotation | Visible |
| | DataSource STTMS_CUSTOMER | Field Size * | Read Only |
| SNAME | Column Name * WHEREABOUTS_UNKNOW | | Calender Text |
| 🛅 NLTY 🛅 LBRN | Data Type * Char 👻 | | Popup Edit Requir |
| CCATEG | | | |
| FULLNAME | | | Uppercase Only |
| CIFCREATIONDT | Item Type Database Item 👻 | Maximum Decimals | LOV Validation |
| ISELCMCUST | Parent Field | TextArea Rows | Required |
| ELCMCUSTNO | Related Block | Taxtéres Columns | Input by LOV Only |
| aR_AP_TRACKING | Related Field | Default Value N | Not Required In Xs |
| EXPCNTRY | LOV Name | Deladit value | Report Parameter |
| iii UIDNAME | Off Line LOV Name | Preview Value | |
| CIDVAL | | Mask Id | |
| FROZEN | Fieldset Name FST_STATUS | | |
| DEAD | Custom Attributes Events | | |
| WHRUNKN | | | + - |
| | | | |
| SSN | Attribute Name | Attribute Value Active Position | on |
| SWIFTCD | | No. | |
| | OFF N | Yes 🔻 1 | |
| MAILRSREQD | V ON Y | Yes 🔻 2 | |
| GRPCD | | | |
| EXPCAT | | | |
| CUSTCLASSFN | | | |
| CIFSTAT | | | |
| CIFSTATSNC | | | |
| CHGGRP | | | |
| CUSTCLGGRP | | | |
| TAXGROUP | | | |
| CLSPARTICIPANT | | | Ψ. |
| FXNETTCUST | | | |
| T XREF | | | |

Fig 3.3.2: Setting the field invisible

| ee Customi | | | | | | | | | 7 |
|------------|-----------------------------|-------------------------------|---------------------------|--------------------------------|--------------------------|--------------------------|----------|------------|-----|
| | 🔶 Customer | | | | | | ×× | I V | ه ۲ |
| | 📭 New 🦻 Enter Query | | | | | | | | |
| c | Туре | Individual | Full Name | | Customer Category * | | <u>^</u> | | |
| | | Corporate | Short Name | * | | Private Customer | | | |
| Save | | Bank | Branch Code | | | | | | |
| h | Customer No * | P | | | | | | - Aï | |
| | | | | | | | | | |
| DalaBlod | Personal Corporate Ad | ditional Director Auxiliary C | heck List | | | | | | |
| Screens | Domicile Address | | Status | | Identifier | | | | |
| | | Same as Permanent | | Frozen | Name | | | | |
| CVS_(| | Address | _ | Deceased | Value | | | | |
| | Address 1 | | | | | | | | |
| CVS_I | Address 2 | | | Eligible for AR-AP Tracking | -Relationship Manager- | | | | |
| | Address 3 | | | CRM Customer | RM ID | | | + | - |
| CVS | Address 4 | | | Mailers Required | RM Name | | A | ctive | ~ |
| CVS | Pin Code | | | CLS Participant | -Combined Statement Pla | an | - Ye | es 💌 | |
| I 🧰 CVS_(| Country | | | Issuer Customer | | Auto Generated Statement | - | es * | |
| CVS_L | Misc Details | | | Treasury Customer | | Plan | Ie | | |
| CVS_L | SWIFT Code | | | Joint Customer | Frequency | Select 👻 | | | |
| | | | | MT920 | Statement Day | - | | | |
| | Credit Rating Group Code | | | Relationship Pricing | | | | | |
| FieldSel: | | | | ELCM Customer | | | | | |
| | Charge Group | | ELCM Customer | | | | | | |
| | Clearing Group | | Number CIF Status | | | | | | |
| | Tax Group | | Since | | | | | | |
| | Exposure | | Since | | | | | | |
| | Exposure Category | | | | | | | | |
| | Customer Classification | | | | | | | | + |
| | External Reference | | | | | | | | |
| | Number | | | | | | | | |
| | Location | | | | | | | | |
| | FX Netting Customer | | | | | | | | |
| | Media | | | | | | | | |
| | SSN | | | | | | * | | |
| | Group MIS Joint | Standing Instructions I | inked Entities Text F | Fields Image Limits | CLS Restrictions MT920 | Domestic Professional | L 🔺 | | |
| | Issuer Cards Lin | ked Account KYC Details | Joint Venture Accourt | t Details NSF Black list st | atus Documents Chang | ge Log | | | |
| | Maker | D | ate Time: | Mod No | | | | | |
| | Checker | | | Record Status | | Ex | | | |
| | | D | ate Time: | Authorization Status | | EX | | | |

Fig 3.3.3: The field invisible on screen after deploying units generated from screen customizer

Example 2:

Requirement: Adding a new Tab to the Screen. Move fields from one tab to another

As shown in below screenshot Main Tab contains Unique Identifier Field set. This field has to be moved to a new tab

| ♦ Customer | | | | | × |
|--|---|--|---|--------------------------|--|
| 🖹 New 🦻 Enter Query | 1 | | | | |
| Type Customer No * | Individual Corporate Bank | Full Name Short Name * Branch Code | | Customer Category * | Private Customer |
| Personal Corporate Ad | dditional Director Auxiliar | V Check List | | | |
| Domicile Address | | - Status | | Identifier | |
| Address 1 Address 2 Address 3 Address 4 Pin Code Country Misc Details SWIFT Code Credit Rating Group Code Charge Group Clearing Group Clearing Group Tax Group Exposure Exposure Category Classification External Reference Number | Same as Permanent Address | ELCM Customer Number CIF Status Since | Frozen Deceased Whereabouts Unknown Eligible for AR-AP Tracking CRM Customer Mailers Required CLS Participant Issuer Customer Treasury Customer Joint Customer MT920 Relationship Pricing ✓ ELCM Customer | | Auto Generated Statement Plan Select v |
| Location FX Netting Customer Media SSN Group MIS Joint | Standing Instructions | Linked Entities Text F | ields Image Limits | CLS Restrictions MT920 | Domestic Professional 🍝 |
| Issuer Cards Lin Maker Checker | nked Account KYC Deta | ails Joint Venture Account Date Time: Date Time: | Details NSF Black list stat Mod No Record Status Authorization Status | tus Documents Change | Exit |

Fig 3.3.4: The section 'Unique Identifier'

In Screen Customizer, developer can add the new tab. Modify the properties of the field set .i.e. attach to this new tab.

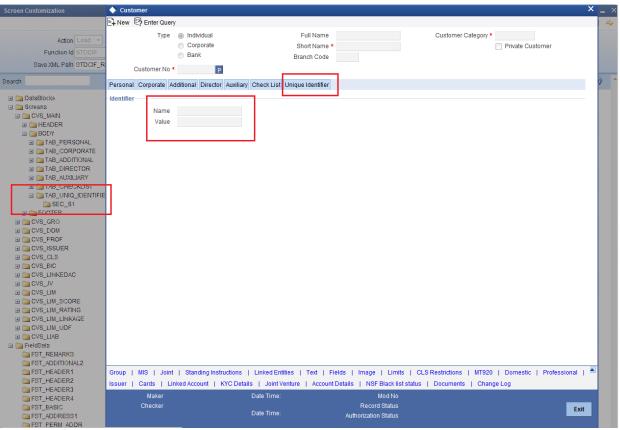


Fig 3.3.5: Section 'Unique Identifier' moved to a new tab



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