

Getting Started  
Oracle FLEXCUBE Investor Servicing  
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# 1. Preface

This document describes the concepts and helps reader to get started using Rapid Application Development (Open Development) web based development tool, to develop FLEXCUBE IS user interface screens.

## 1.1 Audience

The Open Development getting started book is intended for the FLEXCUBE Application Developers who perform the following tasks with Extensible Open Development:

- Develop the new screen ( also called as function ID)
- To modify the existing screen
- Bug Fixing the existing screen

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 PLSQL developer        | Respective vendor documents                                |
| Working knowledge of PLSQL & SQL Language   | Self Acquired                                              |
| Working knowledge of XML files              | Self Acquired                                              |

## 1.2 Related Documents

For more information on Open Development development, see these resources:

- Development Overview Guide
- Reference
- FCUBS-FD05-03-01-DDL-Reference
- FCUBS-FD05-04-01-TrAX-Reference

## 1.3 Conventions

The following text conventions are used in this document:

### Convention Meaning

|                                                                                   |                                                                                                                                                                   |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b>                                                                   | Boldface type indicates graphical user interface elements (for example, menus and menu items, buttons, tabs, dialog controls), including options that you select. |
| <i>italic</i>                                                                     | 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 name, URLs, text that appears on the screen, or text that you enter.                    |
|  | Indicates important information                                                                                                                                   |

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## 2. Introduction

### 2.1 How to Use this Guide

The information in this guide includes:

- [Chapter 2, “Introduction”](#)
- [Chapter 3, “Getting started”](#)
- [Chapter 4, “Installation”](#)
- [Chapter 5, “Function ID”](#)
- [Chapter 6, “Development cycle”](#)
- [Chapter 7, “Function ID specification Sheet”](#)
- [Chapter 8, “generated units”](#)
- [Chapter 9, “Screen runtime data flow”](#)
- [Chapter 10, “Resources”](#)

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## 3. Open Development Getting started

### 3.1 What is Open Development

Rapid Application Development (Open Development) is the Web based tool that is intended to develop the FLEXCUBE IS screens and other components. It is the Integration Development Environment for the FLEXCUBE Application Development.

Open Development is used for the following purpose:

- Develop the Function ID and Deploy into Target environment
- Develop the Web service related files for a Function ID
- Develop the Notification Open Development xml and Notification Triggers
- Develop the Function ID to integrate the BIP report
- To modify the layouts of graphical components
- To extend the Function ID for business purpose ( customers/partners)

### 3.2 What is Needed to Work with Open Development

- Open Development tool installed and URL to be accessible
- Target FLEXCUBE application development environment

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## 4. Open Development Installation

*Refer FCUBS-FD05-02-02-Open Development-Installation and Setup for installation and setup of project/release details*

Typically Open Development environments are shared by multiple Application developers.

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## 5. Function ID

Function ID (screen) forms the basic block of FLEXCUBE IS software. Understanding various function ID types helps developer to choose appropriate parameters during Open Development development.

### 5.1 Classifications

FLEXCUBE Host function IDs and Branch function IDs are classified in two ways:

- Routing Type for Host and Branch screens
- This classification can be retrieved from factory shipped information *routing type* that define the FLEXCUBE Application Menu structure.

| Routing Type | Type          |
|--------------|---------------|
| R            | Report        |
| M            | Maintenance   |
| X            | Extensible    |
| B            | Batch         |
| O            | Online        |
| L            | ELCM screens  |
| null         | Miscellaneous |

- Third character of Host screen Function ID depicts the type of function ID

| Third character | Type          |
|-----------------|---------------|
| D               | Detail        |
| S               | Summary       |
| R               | Report        |
| C               | Call form     |
| N               | Notification  |
| A               | Authorization |

**Example:**

- STDCIF - Detailed screen
- STSCIF – Summary screen
- ACRJRNAL – Report Screen
- CONCUSAD - Notification of customer address on core module
- 1010 – Web Branch screen

## **5.2 Actions and Applicability**

FLEXCUBE Function ID can send the following action request to database. Depending upon the function ID type, certain actions applicable and others restricted.

### **5.2.1 Actions**

| Action      | Purpose                                                                        |
|-------------|--------------------------------------------------------------------------------|
| New         | To Create the New record at Data sources.                                      |
| Copy        | To copy the Non Primary key data to another record                             |
| Delete      | To Delete the record before authorization                                      |
| Close       | To mark record closed ( after authorization )                                  |
| Unlock      | To amend/modify the record, unlock request sent to FLEXCUBE, followed by Save. |
| Reopen      | To re-open the closed record                                                   |
| Print       | To Print the data                                                              |
| Save        | To Save the data entered in form.                                              |
| Authorize   | To Authorize the record.                                                       |
| Reverse     | To Reverse the transactions/contracts                                          |
| Rollover    | To Rollover the transactions/contracts                                         |
| Confirm     | To confirm certain transactions                                                |
| Liquidate   | To Liquidate the contracts                                                     |
| Hold        | To Hold the contracts for further actions at later time                        |
| Template    | To create as template                                                          |
| View        | To View the certain details/messages                                           |
| Generate    | To generate certain messages                                                   |
| Enter Query | To Enter Query                                                                 |

| Action        | Purpose          |
|---------------|------------------|
| Execute Query | To Execute Query |

### 5.2.2 Applicability

| Action        | Maintenance | Online |
|---------------|-------------|--------|
| New           | Yes         | Yes    |
| Copy          | Yes         | Yes    |
| Delete        | Yes         | Yes    |
| Close         | Yes         |        |
| Unlock        | Yes         | Yes    |
| Reopen        | Yes         |        |
| Print         | Yes         | Yes    |
| Save          | Yes         | Yes    |
| Authorize     | Yes         | Yes    |
| Reverse       |             | Yes    |
| Rollover      |             | Yes    |
| Confirm       |             | Yes    |
| Liquidate     |             | Yes    |
| Hold          |             | Yes    |
| Template      |             | Yes    |
| View          |             | Yes    |
| Generate      |             | Yes    |
| Enter Query   | Yes         |        |
| Execute Query | Yes         |        |

---

## 6. Open Development development cycle

Open Development Function ID development consists of the below broad steps. For detailed procedures, refer the Resources section.

|                     |                                                                                                                                                                                               |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CreateSpecification | <ul style="list-style-type: none"><li>•Identify the function ID name</li><li>•Create the DB objects</li><li>•Identify the relationships</li><li>•Identify the call forms/subscreens</li></ul> |
| DesignLayouts       | <ul style="list-style-type: none"><li>•Design the Main screen and other screens</li><li>•Design the Tabs / Buttons</li><li>•Design the field sets and fields linkage</li></ul>                |
| Develop             | <ul style="list-style-type: none"><li>•Add data source,datablock,LOV,fieldsets,screens,fields</li><li>•Preview and Check</li><li>•Generate the files</li></ul>                                |
| Deploy              | <ul style="list-style-type: none"><li>•Deploy the files into target environment( App layer &amp; database layer)</li></ul>                                                                    |
| Test                | <ul style="list-style-type: none"><li>•Test with FLEXCUBE URL</li></ul>                                                                                                                       |

## 7. Open Development Function ID Specification Sheet

From Functional specification/BRD, application developer can write technical specification, to develop the screen. This section describes the sample specification sheet for reader to get started.

Refer the appendices A for sample specification sheet.



Refer the *FCUBS-FD05-02-01-Open Development-Reference* guide to understand every specification attributes that are given here. Refer the appendice A for sample sheet.

### 7.1 Preparation Check List

| Specification                                                                                                                                                                                                                   | Data |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Tables /Views created in Database? (Yes/No)</b><br><i>Tables /Views should be created in Database</i>                                                                                                                        |      |
| <b>Primary Key populated at STTB_PK_COLS ? (Yes/No)</b><br><i>Primark Key details should be defined in STTB_PK_COLS. The data can be inserted using Oracle DML commands.</i>                                                    |      |
| <b>Column Name population at CSTB_DATA_DICTIONARY done? (Yes/No)</b><br><i>Column names should be defined in CSTB_DATA_DICTIONAY. The data can be inserted using Oracle DML commands.</i>                                       |      |
| <b>Label descriptions populated at CSTB_LABELS? (Yes/No)</b><br><i>Label descriptions need to be populated at CSTB_LABELS for a given language that screen is developed. Default language to be used for screen is English.</i> |      |
| <b>Database Schema name linked with Open Development tool?</b><br><i>Your Open Development tool needs to be configured with the Oracle FLEXCUBE Application Database schema where the tables/views created.</i>                 |      |

### 7.2 Basic

| Specification                                                                                              | Data |
|------------------------------------------------------------------------------------------------------------|------|
| <b>Action:</b><br><i>Pick Action:</i> <ul style="list-style-type: none"><li>• New</li><li>• Load</li></ul> |      |

| Specification                                                                                                                                                                                       | Data |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Function Type:</b><br><i>Pick Function Type:</i> <ul style="list-style-type: none"> <li>• Parent</li> <li>• Child</li> </ul>                                                                     |      |
| <b>Function Category</b><br><i>Pick the Category:</i> <ul style="list-style-type: none"> <li>• Maintenance</li> <li>• Report</li> <li>• Transaction</li> <li>• Summary</li> <li>• Others</li> </ul> |      |
| <b>Function ID</b><br><i>Enter Function ID</i>                                                                                                                                                      |      |
| <b>Save XML Path:</b><br><i>Provide your local machine path to save Open Development XML that would be generated.</i>                                                                               |      |
| <b>Parent Function:</b><br><i>Provide Parent Open Development XML name in case you develop Child "Function Type"</i>                                                                                |      |
| <b>Parent Xml:</b><br><i>Provide Parent Open Development XML path case you develop Child "Function Type"</i>                                                                                        |      |
| <b>Header Template:</b><br><i>Pickup the Header Template:</i> <ul style="list-style-type: none"> <li>• None (Default)</li> <li>• Process</li> </ul>                                                 |      |
| <b>Footer Template:</b><br><i>Pickup Footer template:</i> <ul style="list-style-type: none"> <li>• Maint Audit</li> <li>• Maint Process</li> <li>• Process</li> </ul>                               |      |

## 7.3 Preferences

| Specification                                                                                           | Data |
|---------------------------------------------------------------------------------------------------------|------|
| <b>Module?</b><br><i>Specify Module code</i>                                                            |      |
| <b>Head office function?</b><br><i>Is it Head office function</i>                                       |      |
| Auto Authorization?<br><i>Applicable for maintenance</i>                                                |      |
| Logging required?<br><i>Flag to enable/disable logging at Gateway layer.</i>                            |      |
| Tanking Modifications?<br><i>Should Tanking feature needs to be enabled.</i>                            |      |
| Field log required?<br><i>Should you required field level audit logs (in FLEXCUBE – STTB_FIELD_LOG)</i> |      |

## 7.4 Data Source

Repeat the below table for every Data source added

| Specification                                                                                                                                                                                                                  | Data |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Data source name</b><br><i>Fill up the Data source name. Follow the FLEXCUBE naming conventions for data source entities</i>                                                                                                |      |
| <b>Is it Master?</b><br><i>When multiple data sources used in a screen, one has to be Mater type. Accordingly select Yes/No</i>                                                                                                |      |
| <b>Relation type?</b><br>This defines detail to parent relationships when multiple data sources used. Define one of the below accordingly <ul style="list-style-type: none"> <li>• One to One</li> <li>• One to Man</li> </ul> |      |
| <b>Is it Multi Record data source?</b><br><i>This defines if multiple records to be shown on screen.</i>                                                                                                                       |      |
| <b>Parent?</b><br><i>This defines the parent data source for this multiple record data source.</i>                                                                                                                             |      |

| Specification                                                                                                                                               | Data |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Relation?</b><br><i>This defines the relation KEYS between the data sources. It refers the columns use to join tables.</i>                               |      |
| <b>Where clause?</b><br><i>Specify where clause</i>                                                                                                         |      |
| <b>Default order by?</b><br><i>Specify Default Order by clause</i>                                                                                          |      |
| <b>Type of Data source?</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Normal</li> <li>• Query</li> <li>• InOnly</li> <li>• Summary</li> </ul> |      |
| <b>PK Cols</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                           |      |
| <b>PK Types</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                          |      |

## 7.5 Data Source Columns

Repeat the below table for every column under every Data Block added

| Specification                                                                      | Data |
|------------------------------------------------------------------------------------|------|
| <b>Column Name</b><br><i>Specify the column name</i>                               |      |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> |      |

## 7.6 LOV

Repeat the below table for every LOV added

| Specification                               | Data |
|---------------------------------------------|------|
| <b>LOV Name</b><br><i>Specify LOV name.</i> |      |

| Specification                         | Data |
|---------------------------------------|------|
| <b>LOV Query</b><br>Specify LOV Query |      |

## 7.7 Data Block

Repeat the below table for every Data Block added

| Specification                                                                                                         | Data |
|-----------------------------------------------------------------------------------------------------------------------|------|
| <b>Block Name</b><br>Specify block name. Follow naming convention.                                                    |      |
| <b>Block Title</b><br>Specify Block Title.                                                                            |      |
| <b>Parent</b><br>Specify the Parent Block incase if this is multi record detail block                                 |      |
| <b>Relation Type</b><br>Pick <ul style="list-style-type: none"> <li>One to One</li> <li>One to Many</li> </ul>        |      |
| <b>XSD Node</b><br>Specify the name to be used in XSD for Web service types. Follow the naming convention             |      |
| <b>Block Type</b><br>Pick: <ul style="list-style-type: none"> <li>Control</li> <li>Normal</li> <li>Summary</li> </ul> |      |
| <b>Multi Record</b><br>Pick Yes/No.                                                                                   |      |
| <b>Master Block</b><br>Pick Yes/No                                                                                    |      |

| Specification                                                                        | Data |
|--------------------------------------------------------------------------------------|------|
| <b>Data sources to be added</b><br><i>Link the data source with this data block.</i> |      |

## 7.8 **Block Fields**

Repeat the below table for every field under every Data block added. Block properties edit is optional step. User can add/delete the feature that impacts the specification in below table.

| Specification                                                                                     | Data |
|---------------------------------------------------------------------------------------------------|------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                |      |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             |      |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  |      |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     |      |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              |      |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> |      |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> |      |

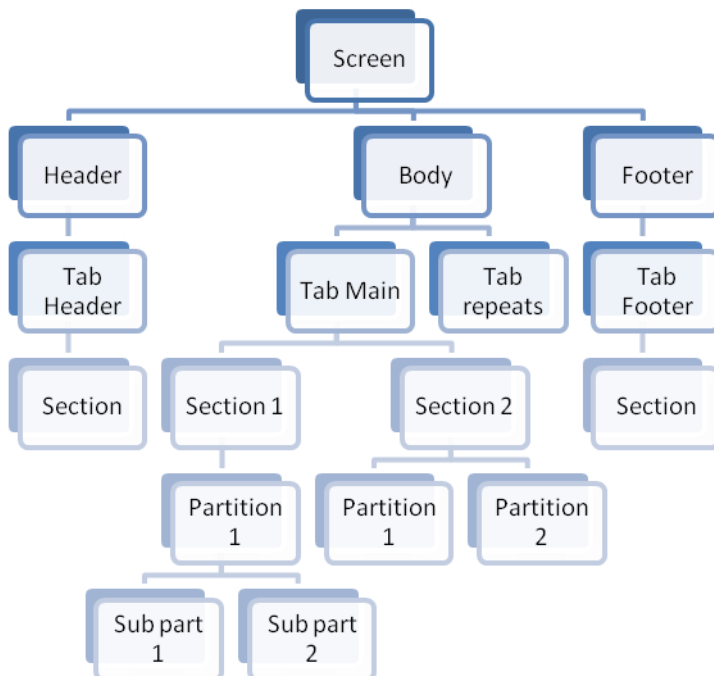
For event type fields, the below can be specified.

| Specification                                                                                                    | Data |
|------------------------------------------------------------------------------------------------------------------|------|
| <b>Event name</b><br>Pick predefined JavaScript events                                                           |      |
| <b>Function Name</b><br>Pick/specify Function name associated in javascript.                                     |      |
| <b>Event Type</b><br>Event type associated with Button: <ul style="list-style-type: none"> <li>Normal</li> </ul> |      |

| Specification                                                                                               | Data |
|-------------------------------------------------------------------------------------------------------------|------|
| <ul style="list-style-type: none"> <li>• Call form</li> <li>• Sub function</li> <li>• Sub Screen</li> </ul> |      |
| <b>Button Screen</b><br><i>Specify the Screen name if call form applicable</i>                              |      |
| <b>Call form Name</b><br><i>Fill this if event type is call form.</i>                                       |      |
| <b>Screen Name</b><br><i>Fill screen name if event type is call form or subscreen</i>                       |      |

## 7.9 Screens

Screens are organized



Repeat the below table for every Screens added

| Specification                                   | Data |
|-------------------------------------------------|------|
| <b>Screen Name</b><br><i>Define screen name</i> |      |

| Specification                                                                                                                                                               | Data |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Screen Title:</b><br><i>Specify the screen title</i>                                                                                                                     |      |
| <b>Screen Size:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Small</li> <li>• Medium</li> <li>• Large</li> </ul>                                             |      |
| <b>Exit Button type:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Default Cancel</li> <li>• Default Ok Cancel</li> <li>• Default Ok Reject Cancel</li> </ul> |      |
| <b>Is it Main screen?</b><br><i>Pick Yes/No</i>                                                                                                                             |      |

Repeat the below table for every Tabs added

| Specification                                                            | Data |
|--------------------------------------------------------------------------|------|
| <b>Screen name</b><br><i>Link screen name with the Tab Name</i>          |      |
| <b>Tab Name</b><br><i>Specify the Tab name. Follow naming convention</i> |      |

Repeat the below table for every Sections added

| Specification                                                                                   | Data |
|-------------------------------------------------------------------------------------------------|------|
| <b>Section Name</b><br><i>Specify the section Name</i>                                          |      |
| <b>Partition Names</b><br><i>Define partition names. If applicable ad sub partition number.</i> |      |

## 7.10 Field Sets

Repeat the below table for every Field sets added

| Specification | Data |
|---------------|------|
|---------------|------|

| Specification                                                                                                                                                  | Data |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Fieldset Name</b><br>Specify Field set name                                                                                                                 |      |
| <b>Screen Name</b><br>Specify the already defined Screen name                                                                                                  |      |
| <b>Data Block</b><br>Specify the already defined Data block                                                                                                    |      |
| <b>Multi Record</b><br>Pick Yes/No                                                                                                                             |      |
| <b>View Type</b><br>Pick single/Multiple                                                                                                                       |      |
| <b>Screen Portion</b> <ul style="list-style-type: none"> <li>Pick</li> <li>Header</li> <li>Body</li> <li>Footer</li> </ul>                                     |      |
| <b>Tab Name</b><br>Specify the already defined Tab name                                                                                                        |      |
| <b>Section Name</b><br>Specify the already defined Section Name                                                                                                |      |
| <b>Partition Name</b><br>Specify the already defined Partition name                                                                                            |      |
| <b>FieldSet Fields:</b><br>Add data block fields that you wish to appear in given<br><Screen.Tab.Section.Partition><br>Also select Sub partition if applicable |      |

## 7.11 Call Form

Repeat the below table for every Call form added

| Specification                                 | Data |
|-----------------------------------------------|------|
| <b>Function ID</b><br>Link the call form name |      |

| Specification                                                                                                              | Data |
|----------------------------------------------------------------------------------------------------------------------------|------|
| <b>Parent Block</b><br><i>Link the parent block defined</i>                                                                |      |
| <b>Parent Data source</b><br><i>Link the parent data source defined</i>                                                    |      |
| <b>Relation</b><br><i>Define the relation</i>                                                                              |      |
| <b>Relation Type:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• One to One</li> <li>• One to Many</li> </ul> |      |

## 7.12 Summary

| Specification                                                                                                                                                   | Data |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| <b>Data Block</b><br><i>Link the Data block defined</i>                                                                                                         |      |
| <b>Data Source</b><br><i>Link the data source defined</i>                                                                                                       |      |
| <b>Summary Type</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Summary</li> <li>• Query</li> <li>• Bulk Authorization</li> <li>• Upload</li> </ul> |      |
| <b>DataBlock fields</b><br><i>Add data block fields and specify if this need to be queriable field.</i>                                                         |      |

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## 8. Open Development generated units

Open Development generates the following type of files:

| File Type              | File extensions                   | Category         | Deployment Layer   |
|------------------------|-----------------------------------|------------------|--------------------|
| Open Development XML   | <functioned>_Open Development.xml | Development file | Not Applicable     |
| UI XML                 | <functioned>.xml                  | Run time         | Application Server |
| Java Script            | *.js                              | Run time         | Application Server |
| Database INC files     | *.INC                             | Run time         | Database           |
| Database spec and body | *.spc, *.sql                      | Run time         | Database           |

Refer the complete check list and detailed deployment steps in Open Development tools reference guide.

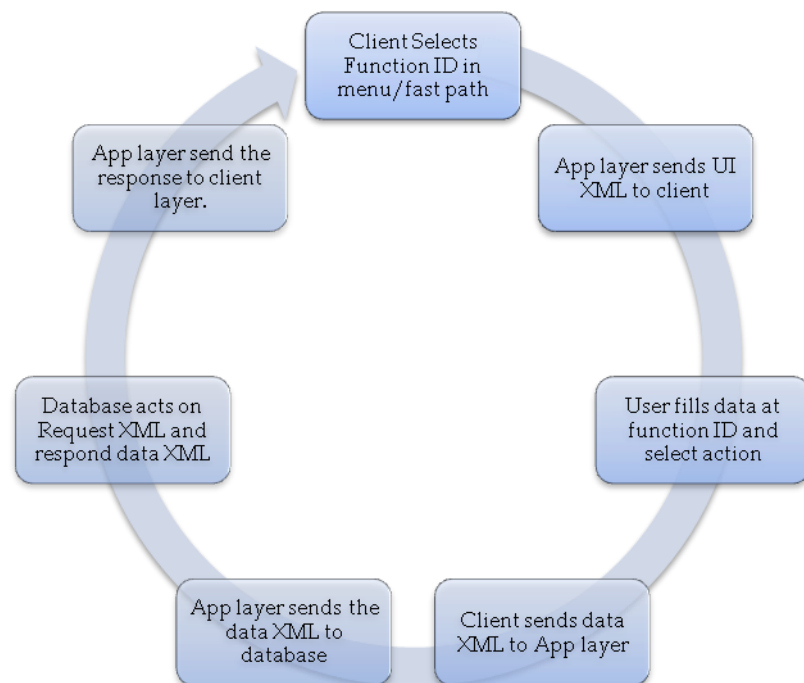
---

## 9. Open Development Screen runtime data flow

FLEXCUBE at runtime works with two kind of XML between client browser and application server layers:

- UI XML  
This is the User interface definition XML file which is generated by Open Development tool. UI XML would have the definition of graphical elements like data block, screens, fields etc.
- Data XML  
This is the runtime FLEXCUBE data structure XML used for HTTP request and response. This structure is defined at various code lines like JS files, FLEXCUBE frameworks, database spec and bodies.

The below diagram explains the flow of the above XMLs during the FLEXCUBE application user operations:



---

## 10. Resources

Refer the below resources to gain further working knowledge with Open Development tool.

| To Do                                                      | Resources                     |
|------------------------------------------------------------|-------------------------------|
| Open Development tool installation                         | Installation and Setup        |
| Open Development complete reference guide                  | Reference                     |
| Open Development screen development step by step procedure | Function ID Development       |
| Open Development web service development                   | Web Service Development       |
| BIP report integration with Open Development screen        | BIP Report Integration        |
| Outbound Notification trigger development                  | Notification Development      |
| Extensibility Getting started                              | Getting started               |
| Extensibility Reference guide                              | Extensibility Reference Guide |
| Extensibility use case development examples                | Extensibility By Example      |

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## 11. Appendices

This section documents the specification for STDACPER function ID

### 11.1 Preparation Check List

| Specification                                                                                                                                                                                                                   | Data     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>Tables /Views created in Database? (Yes/No)</b><br><i>Tables /Views should be created in Database</i>                                                                                                                        | Yes      |
| <b>Primary Key populated at STTB_PK_COLS ? (Yes/No)</b><br><i>Primark Key details should be defined in STTB_PK_COLS. The data can be inserted using Oracle DML commands.</i>                                                    | Yes      |
| <b>Column Name population at CSTB_DATA_DICTIONARY done? (Yes/No)</b><br><i>Column names should be defined in CSTB_DATA_DICTIONAY. The data can be inserted using Oracle DML commands.</i>                                       | Yes      |
| <b>Label descriptions populated at CSTB_LABELS? (Yes/No)</b><br><i>Label descriptions need to be populated at CSTB_LABELS for a given language that screen is developed. Default language to be used for screen is English.</i> | Yes      |
| <b>Database Schema name linked with Open Development tool?</b><br><i>Your Open Development tool needs to be configured with the Oracle FLEXCUBE Application Database schema where the tables/views created.</i>                 | FCPB1121 |

### 11.2 Basic

| Specification                                                                                                                | Data   |
|------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Action:</b><br><i>Pick Action:</i> <ul style="list-style-type: none"><li>• New</li><li>• Load</li></ul>                   | New    |
| <b>Function Type:</b><br><i>Pick Function Type:</i> <ul style="list-style-type: none"><li>• Parent</li><li>• Child</li></ul> | Parent |

| Specification                                                                                                                                                                                       | Data                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| <b>Function Category</b><br><i>Pick the Category:</i> <ul style="list-style-type: none"> <li>• Maintenance</li> <li>• Report</li> <li>• Transaction</li> <li>• Summary</li> <li>• Others</li> </ul> | Maintenance             |
| <b>Function ID</b><br><i>Enter Function ID</i>                                                                                                                                                      | STDACPER                |
| <b>Save XML Path:</b><br><i>Provide your local machine path to save Open Development XML that would be generated.</i>                                                                               | D:\Open DevelopmentTool |
| <b>Parent Function:</b><br><i>Provide Parent Open Development XML name in case you develop Child "Function Type"</i>                                                                                | None                    |
| <b>Parent Xml:</b><br><i>Provide Parent Open Development XML path case you develop Child "Function Type"</i>                                                                                        | None                    |
| <b>Header Template:</b><br><i>Pickup the Header Template:</i> <ul style="list-style-type: none"> <li>• None (Default)</li> <li>• Process</li> </ul>                                                 | None                    |
| <b>Footer Template:</b><br><i>Pickup Footer template:</i> <ul style="list-style-type: none"> <li>• Maint Audit</li> <li>• Maint Process</li> <li>• Process</li> </ul>                               | Main Audit              |

### 11.3 Preferences

| Specification                                | Data                   |
|----------------------------------------------|------------------------|
| <b>Module?</b><br><i>Specify Module code</i> | Static Maintenance(ST) |
| <b>Head office function?</b>                 | No                     |

| Specification                                                                                           | Data |
|---------------------------------------------------------------------------------------------------------|------|
| <i>Is it Head office function</i>                                                                       |      |
| Auto Authorization?<br><i>Applicable for maintenance</i>                                                | No   |
| Logging required?<br><i>Flag to enable/disable logging at Gateway layer.</i>                            | No   |
| Tanking Mofications?<br><i>Should Tanking feature needs to be enabled.</i>                              | No   |
| Field log required?<br><i>Should you required field level audit logs (in FLEXCUBE – STTB_FIELD_LOG)</i> | No   |

## 11.4 Data Source

Repeat the below table for every Data source added

1).

| Specification                                                                                                                                                                                                               | Data           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <b>Data source name</b><br><i>Fill up the Data source name. Follow the FLEXCUBE naming conventions for data source entities</i>                                                                                             | STTM_FIN_CYCLE |
| <b>Is it Master?</b><br><i>When multiple data sources used in a screen, one has to be Mater type. Accordingly select Yes/No</i>                                                                                             | Yes            |
| <b>Relation type?</b><br>This defines detail to parent relationships when multiple data sources used. Define one of the below accordingly <ul style="list-style-type: none"> <li>One to One</li> <li>One to Many</li> </ul> | One to One     |
| <b>Is it Multi Record data source?</b><br><i>This defines if multiple records to be shown on screen.</i>                                                                                                                    | NO             |
| <b>Parent?</b><br><i>This defines the parent data source for this multiple record data source.</i>                                                                                                                          | None           |

| Specification                                                                                                                                               | Data      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>Relation?</b><br><i>This defines the relation KEYS between the data sources. It refers the columns use to join tables.</i>                               | None      |
| <b>Where clause?</b><br><i>Specify where clause</i>                                                                                                         | None      |
| <b>Default order by?</b><br><i>Specify Default Order by clause</i>                                                                                          | None      |
| <b>Type of Data source?</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Normal</li> <li>• Query</li> <li>• InOnly</li> <li>• Summary</li> </ul> | Normal    |
| <b>PK Cols</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                           | FIN_CYCLE |
| <b>PK Types</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                          | VARCHAR2  |

2).

| Specification                                                                                                                                                                                                   | Data              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| <b>Data source name</b><br><i>Fill up the Data source name. Follow the FLEXCUBE naming conventions for data source entities</i>                                                                                 | STTM_PERIOD_CODES |
| <b>Is it Master?</b><br><i>When multiple data sources used in a screen, one has to be Mater type. Accordingly select Yes/No</i>                                                                                 | No                |
| <b>Relation type?</b><br><i>This defines detail to parent relationships when multiple data sources used. Define one of the below accordingly</i> <ul style="list-style-type: none"> <li>• One to One</li> </ul> | One to Many       |

| Specification                                                                                                                                       | Data                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| <ul style="list-style-type: none"> <li>One to Many</li> </ul>                                                                                       |                       |
| <b>Is it Multi Record data source?</b><br><i>This defines if multiple records to be shown on screen.</i>                                            | Yes                   |
| <b>Parent?</b><br><i>This defines the parent data source for this multiple record data source.</i>                                                  | None                  |
| <b>Relation?</b><br><i>This defines the relation KEYs between the data sources. It refers the columns use to join tables.</i>                       | None                  |
| <b>Where clause?</b><br><i>Specify where clause</i>                                                                                                 | None                  |
| <b>Default order by?</b><br><i>Specify Default Order by clause</i>                                                                                  | None                  |
| <b>Type of Data source?</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>Normal</li> <li>Query</li> <li>InOnly</li> <li>Summary</li> </ul> | Normal                |
| <b>PK Cols</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                   | PERIOD_CODE~FIN_CYCLE |
| <b>PK Types</b><br><i>This should get defaulted. Otherwise, specify in tilde separated format.</i>                                                  | VARCHAR2~VARCHAR2     |

## 11.5 Data Source Columns

Repeat the below table for every column under every Data Block added

1). STTM\_FIN\_CYCLE

| Specification                                                                      | Data             |
|------------------------------------------------------------------------------------|------------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | <b>FIN_CYCLE</b> |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 9                |

| Specification                                                                      | Data                 |
|------------------------------------------------------------------------------------|----------------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | <b>FC_START_DATE</b> |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 7                    |

| Specification                                                                      | Data               |
|------------------------------------------------------------------------------------|--------------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | <b>DESCRIPTION</b> |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 105                |

| Specification                                                                      | Data               |
|------------------------------------------------------------------------------------|--------------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | <b>FC_END_DATE</b> |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 7                  |

## 2). STTM\_PERIOD\_CODES

| Specification                                        | Data               |
|------------------------------------------------------|--------------------|
| <b>Column Name</b><br><i>Specify the column name</i> | <b>PERIOD_CODE</b> |

| Specification                                                                      | Data |
|------------------------------------------------------------------------------------|------|
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 3    |

| Specification                                                                      | Data          |
|------------------------------------------------------------------------------------|---------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | PC_START_DATE |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 7             |

| Specification                                                                      | Data        |
|------------------------------------------------------------------------------------|-------------|
| <b>Column Name</b><br><i>Specify the column name</i>                               | PC_END_DATE |
| <b>Max Length</b><br><i>It is optional to change Max length to input at field.</i> | 7           |

## 11.6 LOV

Repeat the below table for every LOV added

| Specification                                | Data |
|----------------------------------------------|------|
| <b>LOV Name</b><br><i>Specify LOV name.</i>  | None |
| <b>LOV Query</b><br><i>Specify LOV Query</i> | None |

## 11.7 Data Block

Repeat the below table for every Data Block added

1).

| Specification | Data |
|---------------|------|
|---------------|------|

| Specification                                                                                                                | Data                         |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| <b>Block Name</b><br><i>Specify block name. Follow naming convention.</i>                                                    | <b>BLK_STTM_PERIOD_CODES</b> |
| <b>Block Title</b><br><i>Specify Block Title.</i>                                                                            | None                         |
| <b>Parent</b><br><i>Specify the Parent Block incase if this is multi record detail block</i>                                 | None                         |
| <b>Relation Type</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>One to One</li> <li>One to Many</li> </ul>        | One to One                   |
| <b>XSD Node</b><br><i>Specify the name to be used in XSD for Web service types. Follow the naming convention</i>             | Sttm-Period-Codes            |
| <b>Block Type</b><br><i>Pick:</i> <ul style="list-style-type: none"> <li>Control</li> <li>Normal</li> <li>Summary</li> </ul> | Normal                       |
| <b>Multi Record</b><br><i>Pick Yes/No.</i>                                                                                   | Yes                          |
| <b>Master Block</b><br><i>Pick Yes/No</i>                                                                                    | No                           |
| <b>Data sources to be added</b><br><i>Link the data source with this data block.</i>                                         | STTM_PERIOD_CODES            |

2).

| Specification | Data |
|---------------|------|
|---------------|------|

| Specification                                                                                                                | Data                      |
|------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| <b>Block Name</b><br><i>Specify block name. Follow naming convention.</i>                                                    | <b>BLK_STTM_FIN_CYCLE</b> |
| <b>Block Title</b><br><i>Specify Block Title.</i>                                                                            | None                      |
| <b>Parent</b><br><i>Specify the Parent Block incase if this is multi record detail block</i>                                 | None                      |
| <b>Relation Type</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>One to One</li> <li>One to Many</li> </ul>        | One to One                |
| <b>XSD Node</b><br><i>Specify the name to be used in XSD for Web service types. Follow the naming convention</i>             | Sttm-Fin-Cycle            |
| <b>Block Type</b><br><i>Pick:</i> <ul style="list-style-type: none"> <li>Control</li> <li>Normal</li> <li>Summary</li> </ul> | Normal                    |
| <b>Multi Record</b><br><i>Pick Yes/No.</i>                                                                                   | No                        |
| <b>Master Block</b><br><i>Pick Yes/No</i>                                                                                    | Yes                       |
| <b>Data sources to be added</b><br><i>Link the data source with this data block.</i>                                         | STTM_FIN_CYCLE            |

## 11.8 Block Fields

Repeat the below table for every field under every Data block added. Block properties edit is optional step. User can add/delete the feature that impacts the specification in below table.

### 1. BLK\_STTM\_FIN\_CYCLE

| Specification     | Data            |
|-------------------|-----------------|
| <b>Field Name</b> | <b>FINCYCLE</b> |

| <b>Specification</b>                                                                              | <b>Data</b> |
|---------------------------------------------------------------------------------------------------|-------------|
| <i>Specify the field name</i>                                                                     |             |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | FINCYCLE    |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None        |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None        |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None        |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None        |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None        |

| <b>Specification</b>                                                                              | <b>Data</b>        |
|---------------------------------------------------------------------------------------------------|--------------------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                | <b>FCSTARTDATE</b> |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | FCSTARTDATE        |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None               |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None               |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None               |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None               |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None               |

| Specification                                                                                     | Data               |
|---------------------------------------------------------------------------------------------------|--------------------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                | <b>DESCRIPTION</b> |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | DESCRIPTION        |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None               |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None               |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None               |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None               |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None               |

| Specification                                                                                     | Data             |
|---------------------------------------------------------------------------------------------------|------------------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                | <b>FCENDDATE</b> |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | FCENDDATE        |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None             |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None             |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None             |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None             |

| Specification                                                                              | Data |
|--------------------------------------------------------------------------------------------|------|
| <b>Related Field</b><br>Specify this field incase amount that requires currency formatting | None |

| Specification                                                                                                                                                                 | Data     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>Field Name</b><br>Specify the field name                                                                                                                                   | UDFFIELD |
| <b>XSD Node</b><br>Change XSD name if required                                                                                                                                | UDFFIELD |
| <b>LOV Name (if applicable)</b><br>Attach LOV if required                                                                                                                     | None     |
| <b>Field Size</b><br>Change Field input size if needed                                                                                                                        | None     |
| <b>Default Value</b><br>Specify the Default Value if required                                                                                                                 | None     |
| <b>Related Block</b><br>Specify this field incase amount that requires currency formatting                                                                                    | None     |
| <b>Related Field</b><br>Specify this field incase amount that requires currency formatting                                                                                    | None     |
| <b>Event name</b><br>Pick predefined javascript events                                                                                                                        | onclick  |
| <b>Function Name</b><br>Pick/specify Function name associated in javascript.                                                                                                  | None     |
| <b>Event Type</b><br>Event type associated with Button: <ul style="list-style-type: none"> <li>Normal</li> <li>Call form</li> <li>Sub function</li> <li>Sub Screen</li> </ul> | callform |
| <b>Button Screen</b><br>Specify the Screen name if call form applicable                                                                                                       | CVS_MAIN |

| Specification                                                                         | Data     |
|---------------------------------------------------------------------------------------|----------|
| <b>Call form Name</b><br><i>Fill this if event type is call form.</i>                 | CSCUFVAL |
| <b>Screen Name</b><br><i>Fill screen name if event type is call form or subscreen</i> | CSCUFVAL |

## 2. BLK\_STTM\_PERIOD\_CODES

| Specification                                                                                     | Data       |
|---------------------------------------------------------------------------------------------------|------------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                | PERIODCODE |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | PERIODCD   |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None       |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None       |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None       |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None       |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None       |

| Specification                                                    | Data        |
|------------------------------------------------------------------|-------------|
| <b>Field Name</b><br><i>Specify the field name</i>               | PCSTARTDATE |
| <b>XSD Node</b><br><i>Change XSD name if required</i>            | PCSTARTDATE |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i> | None        |

| Specification                                                                                     | Data |
|---------------------------------------------------------------------------------------------------|------|
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None |

| Specification                                                                                     | Data             |
|---------------------------------------------------------------------------------------------------|------------------|
| <b>Field Name</b><br><i>Specify the field name</i>                                                | <b>PCENDDATE</b> |
| <b>XSD Node</b><br><i>Change XSD name if required</i>                                             | PCENDDATE        |
| <b>LOV Name (if applicable)</b><br><i>Attach LOV if required</i>                                  | None             |
| <b>Field Size</b><br><i>Change Field input size if needed</i>                                     | None             |
| <b>Default Value</b><br><i>Specify the Default Value if required</i>                              | None             |
| <b>Related Block</b><br><i>Specify this field incase amount that requires currency formatting</i> | None             |
| <b>Related Field</b><br><i>Specify this field incase amount that requires currency formatting</i> | None             |

## 11.9 Screens

Repeat the below table for every Screens added

| Specification      | Data            |
|--------------------|-----------------|
| <b>Screen Name</b> | <b>CVS_MAIN</b> |

| Specification                                                                                                                                                               | Data           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| <i>Define screen name</i>                                                                                                                                                   |                |
| <b>Screen Title:</b><br><i>Specify the screen title</i>                                                                                                                     | None           |
| <b>Screen Size:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Small</li> <li>• Medium</li> <li>• Large</li> </ul>                                             | Medium         |
| <b>Exit Button type:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Default Cancel</li> <li>• Default Ok Cancel</li> <li>• Default Ok Reject Cancel</li> </ul> | Default Cancel |
| <b>Is it Main screen?</b><br><i>Pick Yes/No</i>                                                                                                                             | Yes            |

Repeat the below table for every Tabs added

| Specification                                                            | Data     |
|--------------------------------------------------------------------------|----------|
| <b>Screen name</b><br><i>Link screen name with the Tab Name</i>          | CVS_Main |
| <b>Tab Name</b><br><i>Specify the Tab name. Follow naming convention</i> | TAB_MAIN |

Repeat the below table for every Sections added

| Specification                                                                                   | Data         |
|-------------------------------------------------------------------------------------------------|--------------|
| <b>Section Name</b><br><i>Specify the section Name</i>                                          | SEC_SECTION1 |
| <b>Partition Names</b><br><i>Define partition names. If applicable ad sub partition number.</i> | PART1        |

| Specification | Data |
|---------------|------|
|---------------|------|

| Specification                                                                                   | Data         |
|-------------------------------------------------------------------------------------------------|--------------|
| <b>Section Name</b><br><i>Specify the section Name</i>                                          | SEC_SECTION2 |
| <b>Partition Names</b><br><i>Define partition names. If applicable ad sub partition number.</i> | PART1        |

## 11.10 Field Sets

Repeat the below table for every Field sets added

| Specification                                                                                                                     | Data               |
|-----------------------------------------------------------------------------------------------------------------------------------|--------------------|
| <b>Fieldset Name</b><br><i>Specify Field set name</i>                                                                             | FST_FIELD1         |
| <b>Screen Name</b><br><i>Specify the already defined Screen name</i>                                                              | CVS_MAIN           |
| <b>Data Block</b><br><i>Specify the already defined Data block</i>                                                                | BLK_STTM_FIN_CYCLE |
| <b>Multi Record</b><br><i>Pick Yes/No</i>                                                                                         | No                 |
| <b>View Type</b><br><i>Pick single/Multiple</i>                                                                                   | Single             |
| <b>Screen Portion</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>• Header</li> <li>• Body</li> <li>• Footer</li> </ul> | Body               |
| <b>Tab Name</b><br><i>Specify the already defined Tab name</i>                                                                    | TAB_MAIN           |
| <b>Section Name</b><br><i>Specify the already defined Section Name</i>                                                            | SEC_SECTION1       |
| <b>Partition Name</b><br><i>Specify the already defined Partition name</i>                                                        | PART1              |

| Specification                                                                                                                                                                   | Data                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <b>FieldSet Fields:</b><br><i>Add data block fields that you wish to appear in given &lt;Screen.Tab.Section.Partition&gt;</i><br><i>Also select Sub partition if applicable</i> | FINCYCLE<br>FCSTARTDATE<br>DESCRIPTION<br>FCENDDATE |

## 11.11 Call Form

Repeat the below table for every Call form added

| Specification                                                                                                          | Data               |
|------------------------------------------------------------------------------------------------------------------------|--------------------|
| <b>Function ID</b><br><i>Link the call form name</i>                                                                   | CSCUFVAL           |
| <b>Parent Block</b><br><i>Link the parent block defined</i>                                                            | BLK_STTM_FIN_CYCLE |
| <b>Parent Data source</b><br><i>Link the parent data source defined</i>                                                | STTM_FIN_CYCLE     |
| <b>Relation</b><br><i>Define the relation</i>                                                                          | None               |
| <b>Relation Type:</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>One to One</li> <li>One to Many</li> </ul> | One to Many        |

## 11.12 Summary

| Specification                                                                                               | Data               |
|-------------------------------------------------------------------------------------------------------------|--------------------|
| <b>Data Block</b><br><i>Link the Data block defined</i>                                                     | BLK_STTM_FIN_CYCLE |
| <b>Data Source</b><br><i>Link the data source defined</i>                                                   | STTM_FIN_CYCLE     |
| <b>Summary Type</b><br><i>Pick</i> <ul style="list-style-type: none"> <li>Summary</li> <li>Query</li> </ul> | Summary            |

| Specification                                                                                           | Data                                                |
|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <ul style="list-style-type: none"> <li>Bulk Authorization</li> <li>Upload</li> </ul>                    |                                                     |
| <b>DataBlock fields</b><br><i>Add data block fields and specify if this need to be queriable field.</i> | FINCYCLE<br>FCSTARTDATE<br>DESCRIPTION<br>FCENDDATE |



Getting Started  
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