Oracle FLEXCUBE Universal Banking ® 12.87.03.0.0 Development of Dashboard Forms

June 2017



Table of Contents

| 1 | Preface | | | | |
|---|--------------------|------------------------|-----|--|--|
| | 1.1 | Audience | . 3 | | |
| | 1.2 | Related Documents | . 3 | | |
| 2 | Intro | oduction | . 4 | | |
| 3 | Cre | ating Dashboard Screen | . 4 | | |
| | 3.1 | Preferences | . 5 | | |
| | 3.2 | Data Sources | . 5 | | |
| | 3.3 | Data Blocks | . 6 | | |
| | 3.3. | 1 Block Fields | . 7 | | |
| | 3.4 | Summary | . 8 | | |
| 4 | Ger | neration of units | . 9 | | |
| 5 | 5 User Maintenance | | | | |

1 Preface

This document describes Dashboard Forms available in Oracle FLEXCUBE and guides the developers in designing a Dashboard screen using Oracle FLEXCUBE Development Workbench for Universal Banking

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 |
| FLEXCUBE Screen Development | 04-Development_WorkBench |
| - | _Screen_Development-I.docx |
| Working knowledge of Web based applications | Self Acquired |
| Working knowledge of Oracle Database | Oracle Documentations |
| Working knowledge of PLSQL & SQL Language | Self Acquired |
| Working knowledge of XML files | Self Acquired |

1.2 Related Documents

<u>04-Development_WorkBench_Screen_Development-I.docx</u> <u>05-Development_WorkBench_Screen_Development-II.docx</u>

2 Introduction

This document provides information on:

- <u>Chapter 2 , "Introduction"</u>
- Chapter 3, "Creating Dashboard Form"
- <u>Chapter 4</u>, "Generation of Units"
- <u>Chapter 5 , "User Maintenance</u>"

3 Creating Dashboard Form

• Log into the Development Workbench and click on *Function Generation* tab.

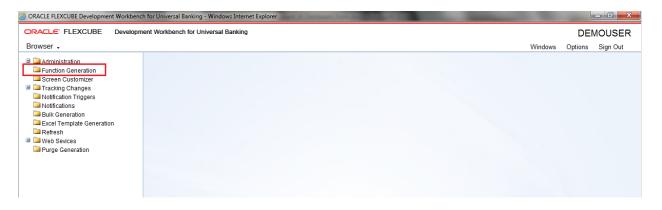


Fig 5.1: Function Generation tab

- Select Action New.
- *Dash Board-id* is to be entered in Function Id field. It follows the same naming convention as a normal function id
- Select Function Type Parent
- Select Function Category Dashboard

| Function Generation | | _ > |
|--|--|--|
| | | 🖫 🗷 🗏 🐬 🍕 🔿 |
| Action New Function Id Save XML Path Search Preferences DataSource ListOValues DataBlocks Screens FieldSets Actions CaliForms LaunchForms | Function Type Parent Parent Function Parent Xml | Function Category Maintenance Header Template Report Footer Template Usintenator DashBoard Others |
| 🦕 Summary | | |
| | Fig 5.2: Selecting Function Ca | ategory |

3.1 Preferences

Developer can maintain the menu details in Preferences screen. Please note that **TYPE STRING** will be generated as 'D' for dashboard screens in **smtb_menu**.

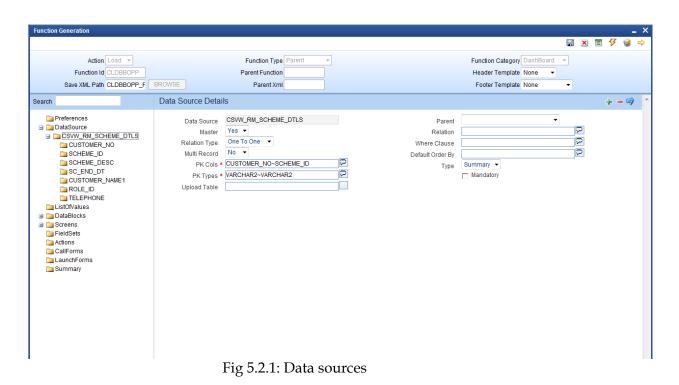
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

| Action Load 👻 | | Type Parent 👻 | | Function Category DashBoard | * | |
|--------------------------|-----------------|---------------|---------------------------|-----------------------------|------------------|---|
| Function Id CLDBBOPP | Parent Fund | | | Header Template None 🔻 | | |
| Save XML Path CLDBBOPP_F | BROWSE Parent | Xml | | Footer Template None | • | |
| rch | Preferences | | | | | 9 |
| Preferences | 🖂 Head Office F | unction | Module | CS 🛃 | | |
| DataSource | 🗖 Logging Requ | uired | Module Description | Core | | |
| istOfValues DataBlocks | Auto Authoriza | ation | Branch Program Id | | | |
| Screens | Tank Modifica | tions | Process Code | | | |
| FieldSets | Field Log Red | quired | SVN Repository URL | | | |
| CallForms | Multi Branch A | ccess | Transaction Block | Choose Block - | | |
| aunchForms | Excel Export F | Required | Name | Choose Field 🔹 | | |
| Carl Summary | | | Transaction Field Name | | | |
| | | | | | | |
| | | | | | Control String + | - |
| | Function Id | | Module * | Module Description | | * |
| | CLDBBOPP | CS | /1 | Core | | |
| | CLSBBOPP | CS | 1 | Core | | |
| | | | | | | |

Fig 5.1.1: Selecting the Preferences

3.2 Data Sources

Developer can add table as per the requirement. Please note that dashboard screen supports only one data source to be added in a screen (which has to be the master data source)



3.3 Data Blocks

Data block has to be created and attach the data source to the block. Currently, dashboard screens can have only one data block

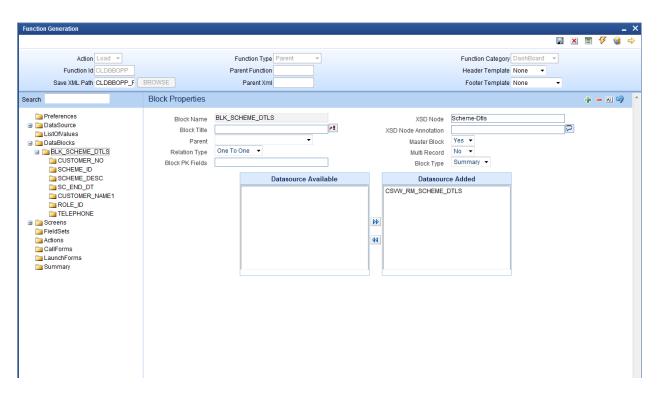


Fig 5.3.1: Data blocks

3.3.1 Block Fields

Add block fields to the block as required. If the field is a linked field (hyper link), select *Display type as Link*.

If the field is a linked field, dashboard link details have to be maintained in *dashboard link* tab.

| Function Generation | | | | _ × |
|--|---|--|---|--|
| | | | | 🖫 🗶 🗏 7 🍕 🔿 |
| Action Load Function Id CLDBBOPP Save XML Path CLDBBOPP_F | Function Type Parent Parent Function BROWSE Parent Xml | •]] | Function Category DashBoard Header Template None - Footer Template None | v v |
| Search | Block Field Properties | | | - 🛛 🟹 🗐 🔺 |
| Preferences DataSource ListOMalues DataSource BLK_SCHEME_DTLS CUSTOMER_NO SCHEME_DD SCHEME_DD SCHEME_DD CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 SCreens FieldSets Califorms Califorms Califorms Summary | Field Name CUSTOMER_NO Field Label DataSource CSW_RM_SCHEME_DTLS Column Name CUSTOMER_NO DataType Varchar2 ~ Display Type LINK Related Field Column Attributes Events DashBoard Link | TextArea Columns Default Value Preview Value | CUSTID | Required Visible Read Only Calender Text Popup Edit Required Uppercase Only LOV Validation Required Input by LOV Only Not Required Insd Report Parameter |
| | Level | Link Type Standard 👻 | Function Name CODSCMQY | + |
| | | | | |
| | | | | Ţ |

Fig 5.3.1.1: Block fields

Level: Level can be either Row or Column.

If it is column, then the link is limited to that column alone and different links can be provided different fields in the same row. Multiple column level links can be defined for a summary dashboard

If it is row, the link is the same across all the fields in the row. Only one row level link can be defined for a summary dashboard. If a row level link is present, then no other link should be defined in the summary dashboard.

Link Type: Link Type can be standard or custom.

Function Name: Provide the function id which has to be launched on clicking the linked field. Linked field value will be taken as the primary key for launching this function id.

3.4 Summary

Development Workbench currently supports only summary dashboards. Attach the block to the summary screen. Hence don't create any screens.

Summary Screen Size: Specify the size of the summary screen

Main Summary Screen: Specify the main summary screen function id which will be launched on clicking *more*

Don't provide any values in default where clause. This has to be maintained by the user through user dashboard maintenance screen in Flex cube. Attach the fields which are required in the summary screen.

| Function Generation _ X | | | | | | | |
|--------------------------|-------------------------------------|-------------------------------|------------------------------|-----------------------------|--------------|--|--|
| | | | | | 🖫 🗷 🗏 🖗 🍯 🚽 | | |
| Action Load * | | Function Type Parent | | Function Category DashBoard | | | |
| Function Id OLDBPNAU | | Parent Function | | Header Templale None * | | | |
| Save XML Path CLOBPNAU_F | | Parent Xmi | | Fooler Template None | • | | |
| Search | Summary Details | | | | | | |
| | Outfinally Details | | | | 14 W | | |
| Preferences DalaSource | Title | | Default Where Clause | | | | |
| Listofvalues | Data Blocks | BLK_UNAUTH • | Default Order By | | 2 | | |
| DalaBlocks | Data Source | CLVW_UNAUTH_TRNS Summary | Multi Branch Where Clause | | | | |
| Screens FieldSets | Summary Type Summary Screen Size | Medium * | Main Summary Screen | | | | |
| 🚞 Actions | Summary Screen Size | PLA MINICO | | WebServices | | | |
| CaliForms | | | | Required | | | |
| Summary | Data Block Fields Cu | usiom Butions Fields Ordering | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | Data Block Fields | Fields Selected | Query LOV Name | | | |
| | | | | | - | | |
| | | | AC_NO | | - | | |
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Below screenshot shows the summary screen along with the preview of the screen

Fig 4.4.1: Summary Screen

4 Generation of units

Following units needs to be generated and deployed for the proper functioning of summary dashboard screen.

- i) SYS js
- ii) UIXML
- iii) Menu details inc (smtb_menu)
- iv) Summary Details inc(cstb_summary_info)
- v) Label Details, Data source details

5 User Maintenance

User need to maintain the dashboards accessible to him in user dashboard maintenance screen in FLEXCUBE . Sequence number of the screens as well as the *where clause of summary screen* has to be provided here.



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