

# **Oracle FLEXCUBE Universal Banking ® 12.87.040.0**

## **Development of Dashboard Forms**

January 2018



## Table of Contents

1	Preface .....	3
1.1	Audience.....	3
1.2	Related Documents .....	3
2	Introduction .....	4
3	Creating 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	Generation of units.....	9
5	User Maintenance.....	10

# 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:

<i>Proficiency</i>	<i>Resources</i>
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	<i>04-Development_WorkBench_Screen_Development-I.docx</i>
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

[\*04-Development\\_WorkBench\\_Screen\\_Development-I.docx\*](#)  
[\*05-Development\\_WorkBench\\_Screen\\_Development-II.docx\*](#)

## 2 Introduction

This document provides information on:

- [Chapter 2 , "Introduction"](#)
- [Chapter 3 , "Creating Dashboard Form"](#)
- [Chapter 4 , "Generation of Units"](#)
- [Chapter 5 , "User Maintenance"](#)

## 3 Creating Dashboard Form

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

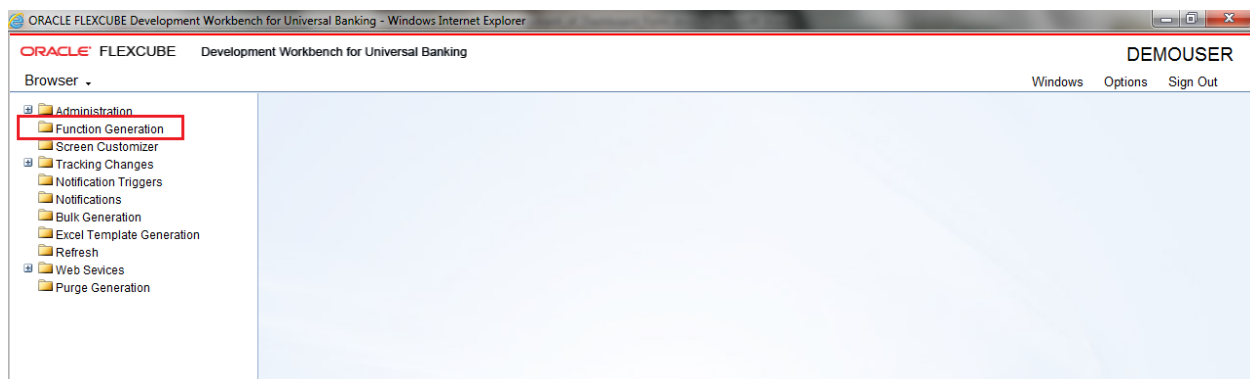


Fig 5.1: Function Generation tab

- 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*

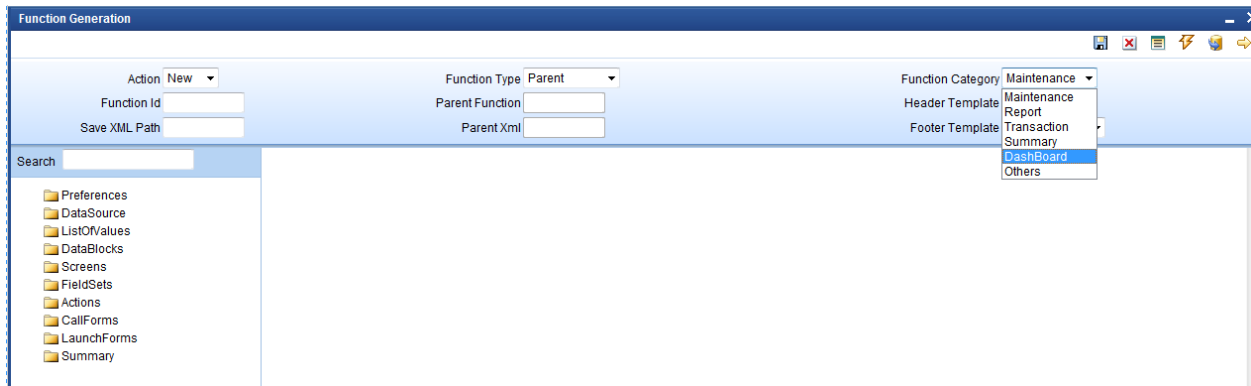


Fig 5.2: Selecting Function Category

### 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.

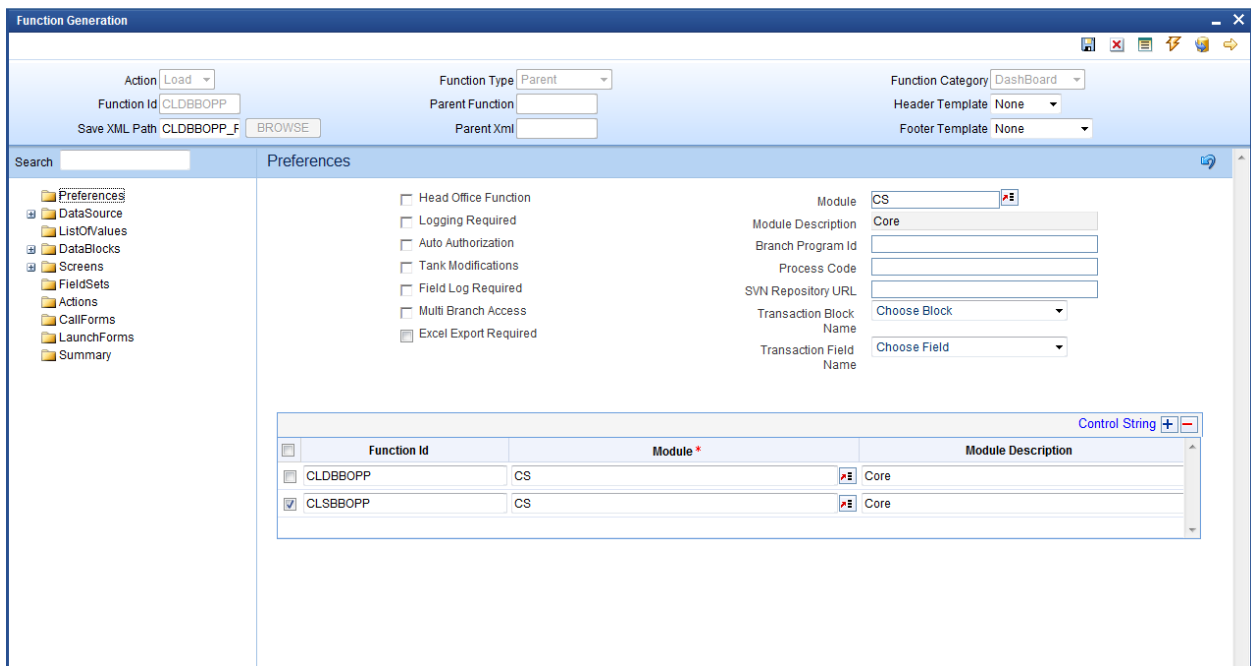


Fig 5.1.1: Selecting the Preferences

### 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)

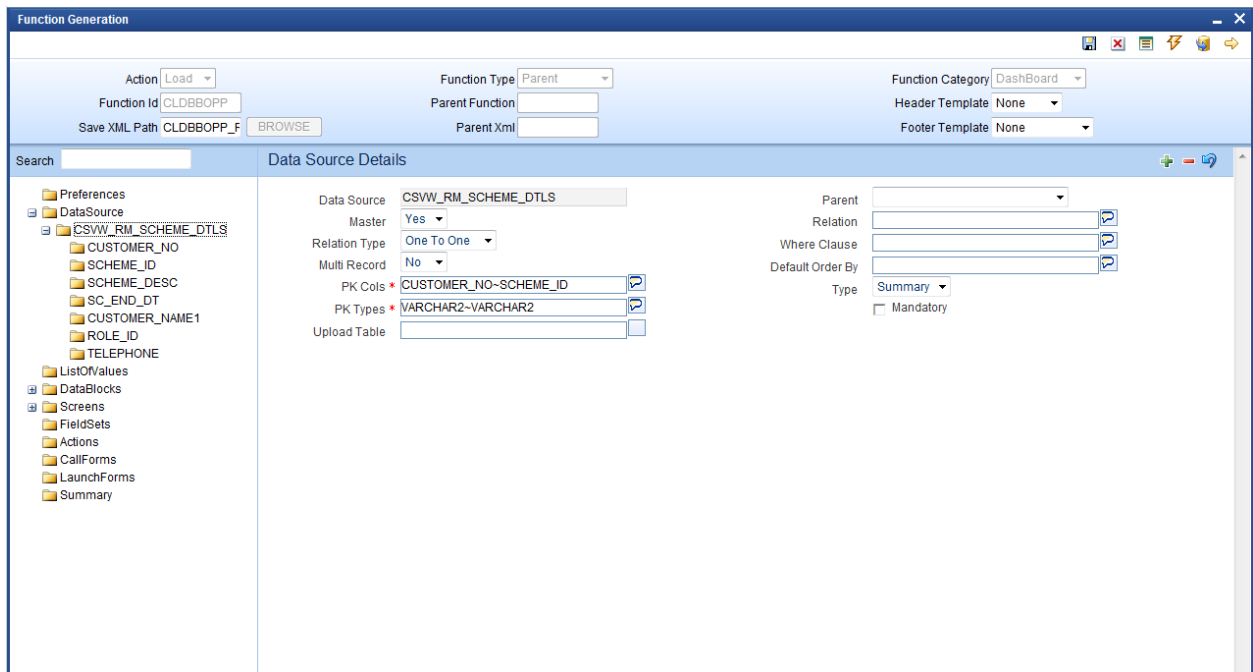


Fig 5.2.1: Data sources

### 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

The screenshot shows the 'Function Generation' application window. The 'Block Properties' dialog is open, displaying configuration for a data block named 'BLK\_SCHEME\_DTLS'. The left sidebar shows a tree view of the project structure, including 'DataSource', 'ListOfValues', 'DataBlocks', 'Screens', 'FieldSets', 'Actions', 'CallForms', 'LaunchForms', and 'Summary'. The 'DataBlocks' folder is expanded, showing 'BLK\_SCHEME\_DTLS' and its sub-items: 'CUSTOMER\_NO', 'SCHEME\_ID', 'SCHEME\_DESC', 'SC\_END\_DT', 'CUSTOMER\_NAME1', 'ROLE\_ID', and 'TELEPHONE'. The 'Block Properties' dialog has the following fields:

- Action:** Load
- Function Id:** CLDBBOPP
- Save XML Path:** CLDBBOPP\_F
- Function Type:** Parent
- Parent Function:**
- Parent Xml:**
- Function Category:** DashBoard
- Header Template:** None
- Footer Template:** None
- Block Name:** BLK\_SCHEME\_DTLS
- Block Title:**
- Parent:**
- Relation Type:** One To One
- Block PK Fields:**
- XSD Node:** Scheme-Dtls
- XSD Node Annotation:**
- Master Block:** Yes
- Multi Record:** No
- Block Type:** Summary
- Datasource Available:**
- Datasource Added:** CSWW\_RM\_SCHEME\_DTLS

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.

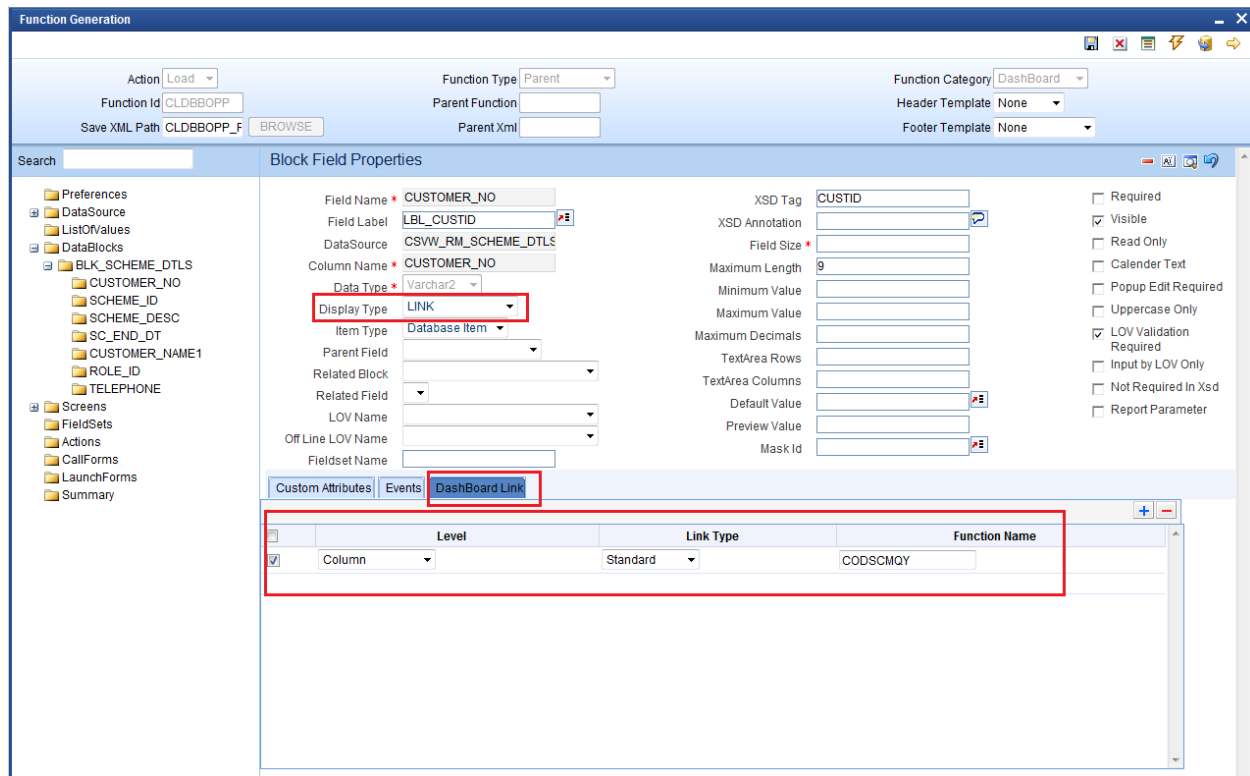


Fig 5.3.1.1: Block fields

**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.

Below screenshot shows the summary screen along with the preview of the screen

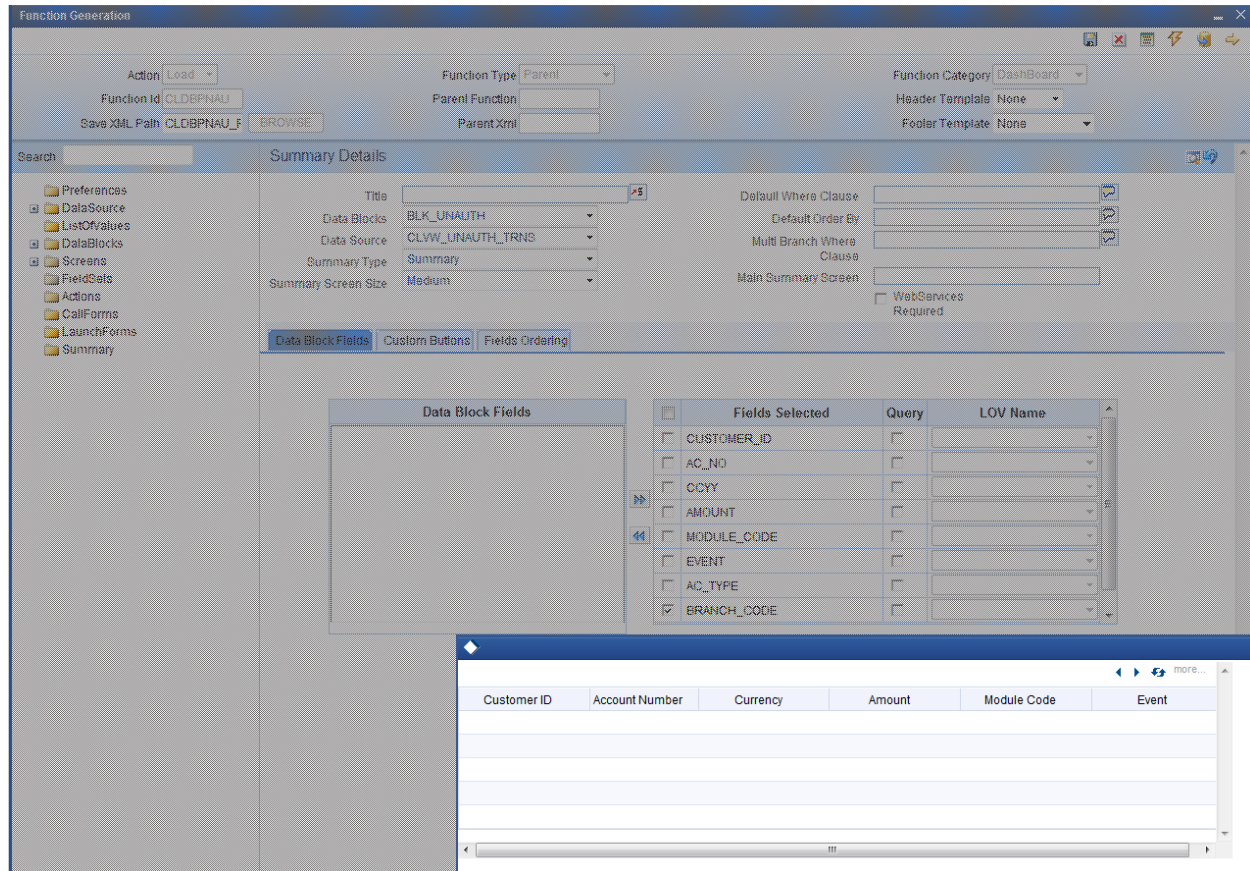


Fig 4.4.1: Summary Screen

## 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.



Development of Dashboard Forms  
January 2018

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200  
[www.oracle.com/ financial\\_services/](http://www.oracle.com/financial_services/)

Copyright © 2017-2018 Oracle Financial Services Software Limited. All rights reserved.

No part of this work may be reproduced, stored in a retrieval system, adopted or transmitted in any form or by any means, electronic, mechanical, photographic, graphic, optic recording or otherwise, translated in any language or computer language, without the prior written permission of Oracle Financial Services Software Limited.

Due care has been taken to make this document *Development of Dashboard Forms* and accompanying software package as accurate as possible. However, Oracle Financial Services Software Limited makes no representation or warranties with respect to the contents hereof and shall not be responsible for any loss or damage caused to the user by the direct or indirect use of *Development of Dashboard Forms* and the accompanying Software System. Furthermore, Oracle Financial Services Software Limited reserves the right to alter, modify or otherwise change in any manner the content hereof, without obligation of Oracle Financial Services Software Limited to notify any person of such revision or changes.

All company and product names are trademarks of the respective companies with which they are associated.