Development Workbench – Screen Customizer Oracle FLEXCUBE Investor Servicing Release 14.0.0.00 [May] [2018]





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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 | User Manuals |
| FLEXCUBE Development Workbench for Universal Banking | |
| | |

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 gives information about the following topics:

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

| Screen 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 |
| Search | | |
| g ⊇ataBlocks g ⊇ DataBlocks g ⊇ FieldSets g ⊇ FieldSets | | |
| | | |
| | | |

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

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 | | | | |
|--|---|---|--|--|
| | | | | 🔚 🗶 🗏 7 🧐 |
| Action Load Function Id STDCIF Save XML Path STDCIF RAD. | Function Type Parer Parent Function BROWSE Parent Xml | nt v | Function Category Maintenance Header Template None - Footer Template Maint Audit | • |
| Search | Block Field Properties | | receiver rempilete |] |
| | Field Name + FLDNAM Field Label DataSource STWS_CUST_LIAB_UDF Column Name + FIELD_NAME Data Type + Varchar2 * Display Type Item Type Parent Field Related Field LOV Name Off Line LOV Name Fieldset Name | XSD Tag XSD Annotation Field Size ' Maximum Length Minimum Value Maximum Decimals TextArea Rows TextArea Rows TextArea Columns Default Value Preview Value Mask Id | FLDNAM | Required Visible Read Only Calender Text Popup Edit Require Uppercase Only LOV Validation Required Input by LOV Only Not Required In Xsoc Report Parameter |
| BLK_CUST_LIAB BLK_LIAB_SCORE BLK_LIAB_RATING BLK_LIAB_LINKAGE BLK_LIAB_UDF | Custom Attributes Events Related Field Attribute Name | Attribute Value | Active Position | + - |
| ■ FLDVAL ■ FLDVAL ■ DATATYP ■ VALTYP ■ BLK_CUSTSEGMENT ■ Screens ■ FieldSets | | | | v |

Fig 3.1.1: Data Block Field in Screen Customizer

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 | | | | | | | | | | _ II 🗶 🗏 🗗 🧐 |
|--|--------------|--|---|--------|---------------------------------------|--|--|------------|--------------------------------------|--|
| Action Load Function Id STDCIF Save XML Path STDCIF_RAD. | BROWSE | Function Type Parent | | | | | Heade | r Template | Maintenance None 👻 Maint Audit | • |
| earch | Fieldset Pro | perties | | | | | | | | - 🛛 🌍 |
| DataBlocks Screens Screens FST_REMARKS FST_ADDITIONAL2 FST_HEADER1 FST_HEADER2 FST_HEADER3 FST_HEADER3 FST_HEADER4 | Multi F | Label PE Block BLK_CUSTOMER * Record No * vType Single * | | s P | Screen Tal Section Partition | n Name Portion b Name n Name n Name Of Rows | CVS_MAIN Header TAB_HEADER SEC_1 PART1 | | • • • | Horizontal Fieldset ReadOnly Navigation Button Visible |
| FST_BASIC FST_PERM_ADDR FST_PERM_ADDR FST_PERM_ADDR FST_PERM_ADDR FST_PASSPORT FST_PASSPORT FST_POWOF_ATTORNEY FST_BUSN_DESC FST_INCORPORATION FST_NORCHORATION FST_ADDRESS2 FST_OMICILE FST_MISC FST_STATUS FST_CORPDIR1 FST_CORPDIR2 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR4 FST_CORPDIR4 FST_CHECKLIST FST_ | E | Data Block Fields CIFCREATIONDT BTN_GRO BTN_MIS BTN_JOINT BTN_SI BTN_LE BTN_TEXT BTN_FIELDS BTN_LMAGE BTN_LM BTN_CLS BTN_DOM | H | 44 | | CTYPE | FieldSet Fields | Subpart | ition Name | |

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 | lomizatio | 20 | | | | | | | | | | | | | | | | | | | | | m 1 | 7 🧃 1 |
|---------------------------|-----------|----------|-----------|--|--------------------------------------|-----------------------------|------------------|----------------------------------|--|---|-------------|-----------------|---|--------------|---------|--|---|---------|---|-----------------------|--|---|------------|-----------|
| Generate | | | | | | | | | | | | | | | | | | | | | | | | |
| | Front-End | Files | | | System Pa | aokages | | | Hook | Paokages | | | | | Meta Da | ta | | | | | O | hers | | |
| RadXI Screet System | n Xmi | | | Main P Main P Nolifica Upload | ackage B stion Trigg i Package | ody gers Spec Body | Informati | Clu Clu Clu Clu Clus | nel Packa ster Pack ster Pack ster Pack | age Spec age Body age Spec age Body kage Body kage Bod |) 7 C | Da LO Blo | nu Detail Iasource V Delails ock Detail reen Dela tendable | Details S | | Label De Block PK Function Gateway Notificatio | Column Call Forr Details on Detail | ms s | | Scree Uplo Uplo | Mih Ann en Htmi ad Table ad Table | otations Trigger S Definition Definition | | |
| | | | | | | | | | Fri | ror Desc | ription | | | | F | rror Cod | e | * | | | | | | |
| | .No | 0777 (2) | | | | | | Requ | | | Processe | ed | | | | D-SAVE- | | | 5 | | Stat | 85 | | ^ |
| 1 | | STDC | | .is | | | | | | | | | | | | | | | | eraled eraled | | - - | | |
| 3 | | | IFRAC | | | | | | | | | | | | | | | | | | | 2 | | |
| | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | - | | | | | | |
| | | | | | | | | | | | | | | | | | (| Dk | | | | | | |
| | | | | | | L | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | Genera | ite | Exit |
| | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Doy | /ou war | nt to open | or save R | RAD.ZIP f | rom 10.18 | 4.132.10 | 0? | | | | | | | Oper | n 🗌 | Save | • | Cano | :el | × | | |

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.

| Screen Cust | omization | | | | | | | | | > |
|---|--------------------------------------|---|--|---------------------------------------|--------------------------|--------------------------|---|--------|----------|--------------|
| | 🔶 Customer | | | | | | × | | I | ' 🍓 🕹 |
| | 🖹 New 🔄 Enter Quen | 1 | | | | | | | | |
| Search | Type Customer No * | Individual Corporate Bank | Full Name Short Name * Branch Code | | Customer Category * | Private Customer | | _ _ | - 10 | a (ý) |
| | | | Obsetted | | | | | | | |
| Dala Scret | | dditional Director Auxiliary | | | | | | | | |
|) C | - Domicile Address | | Status | | - Identifier | | | | | |
| 💿 🧰 C\ | | Same as Permanent Address | | Frozen | Name | | | | | |
| | Address 1 | Address | | Deceased | Value | | | | | |
| | Address 2 | | L | Whereabouts Unknown | - Relationship Manager - | | | | | |
| 🗉 🧰 C\ | Address 3 | | | Eligible for AR-AP | RM ID | | - | | + | |
| | Address 4 | | | Tracking CRM Customer | RM Name | | 9 | A 6 | ctive | ~ |
| C C | Pin Code | | | Mailers Required | - Combined Statement Pl | an | | | es 💌 | |
| I 🛄 CN | Country | | | CLS Participant | | Auto Generated Statement | = | | | |
| 💿 🧰 C\ | Misc Details | | | Issuer Customer | | Plan | | Y | 85 * | |
| | SWIFT Code | | | Treasury Customer | Frequency | Select 👻 | | | | |
| 0 CV | Credit Rating | | | Joint Customer | Statement Day | | | | | |
| 💿 🛄 C\ | Group Code | | | MT920 | | | | | | |
| 🕢 💽 Field | Charge Group | | | Relationship Pricing | | | | | | |
| | Clearing Group | | ELCM Customer | ELCM Customer | | | | | | |
| | Tax Group | | Number | | | | | | | |
| | Exposure | | CIF Status | | | | | | | |
| | Exposure Category | | Since | | | | | | | |
| | Customer | | | | | | | | | - |
| | Classification External Reference | | | | | | | | | |
| | Number | | | | | | | | | |
| | Location | | | | | | | | | |
| | FX Netting Customer | | | | | | | | | |
| | Media | | | | | | | | | |
| | SSN | | | | | | - | | | |
| | | | | | | Domestic Professional | | | | |
| | | Ked Account KYC Deta | ils Joint Venture Account | | us Documents Chan | ge Log | | | | |
| | Maker | | Date Time: | Mod No | | _ | | | | |
| | Checker | | Date Time: | Record Status Authorization Status | | Exit | | | | |
| | | | | Addition 2ation Otatus | | | | | | |

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

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

| en Customization | | | | |
|---|--|--|-------------------------------|--|
| | | | | 🖫 🗶 🗏 🖗 |
| Action Load 👻 | Function Type | arent 👻 | Function Category Maintenance | - |
| Function Id STDCIF | Parent Function | | Header Template None 👻 | |
| Save XML Path STDCIF_RAI | BROWSE Parent Xml | | Footer Template Maint Audit | - |
| 1 | Block Field Properties | | | (|
| ADDRLN3 ADDRLN4 COUNTRY SNAME INLTY LBRN CCATEG FULLNAME GCFCREATIONDT ISELOMCUST ELCMCUSTNO | Field Name WHRUNKN Field Label LBL_WHRUNKN DataSource STTMS_CUSTOMER Column Name WHEREABOUTS_UNKN Data Type Char Display Type Item Type Parent Field Related Block | XSD Tag WHRUNK ZE XSD Annotation Field Size * IOW Maximum Length 1 Minimum Value Maximum Value Maximum Decimals TextArea Rows TextArea Columns | N | Required Visible Read Only Calender Text Popup Edit Requi Uppercase Only LOV Validation Required Input by LOV Only |
| AR_AP_TRACKING EXPCNTRY UIDNAME UIDNAME FROZEN DEAD WHRUNKN CRATE | Related Field LOV Name Off Line LOV Name Fieldset Name FST_STATUS Custom Attributes Events | v v v v v v v v v v v v v v v v v v mask ld | /8 | Not Required In X Report Parameter |
| 🚞 MEDIA 🛅 SSN | Attribute Name | Attribute Value | Active P | Position |
| SWIFTCD | | N | Yes 🔻 1 | |
| LOC MAILRSREQD | | | Yes V 2 | |
| GRPCD EXPCAT CUSTCLASSFN CIFSTAT CIFSTAT CHGGRP CUSTCLGGRP TXCROUP CLSPARTICIPANT FXNETTCUST XREF | | | | ÷ |

Fig 3.3.2: Setting the field invisible

| een Customi | zation | | | | | | | | |
|--|----------------------------|--------------------------------|---------------------------|--------------------------------|--------------------------|--------------------------|----------|----------|------------|
| | 🔶 Customer | | | | | | ×× | 1 | W |
| | 🗗 New 🦻 Enter Query | | | | | | | | |
| r | Type | Individual | Full Name | | Customer Category * | | <u>^</u> | | |
| r | | Corporate | Short Name | * | | Private Customer | | | |
| Save | | Bank | Branch Code | | | | | | |
| rch | Customer No * | P | | | | | | - Aï - | 3 6 |
| | | | | | | | | | |
| DataBlod | Personal Corporate Add | ditional Director Auxiliary Cl | neck List | | | | | | |
| Screens | Domicile Address | | Status | | Identifier | | | | |
| | | Same as Permanent | | Frozen | Name | | | | |
| 🗉 👛 CVS_(| | Address | _ | Deceased | Value | | | | |
| 🗉 🧰 CVS_I | Address 1 | | | | | | | | |
| | Address 2 | | | Eligible for AR-AP Tracking | -Relationship Manager- | | | | |
| CVS_CVS_CVS_CVS_CVS_CVS_CVS_CVS_CVS_CVS_ | Address 3 | | | CRM Customer | RM ID | | | + - | - |
| | Address 4 | | | Mailers Required | RM Name | | Activ | 10 10 | ^ |
| 🗉 🛅 CVS_, | Pin Code | | | CLS Participant | -Combined Statement PI | an | = Yes | * | |
| a 🧰 CVS_t | Country | | | Issuer Customer | | Auto Generated Statement | Yes | | |
| | Misc Details | | | Treasury Customer | | Plan | 100 | | |
| I CVS_L CVS_L | SWIFT Code | | | Joint Customer | Frequency | Select - | | | |
| | Credit Rating | | | MT920 | Statement Day | - | | | |
| 🗉 🛄 CVS_L | Group Code | | | Relationship Pricing | | | | | |
| FieldSel: | Charge Group | | | ELCM Customer | | | | | |
| | Clearing Group | | ELCM Customer | | | | | | |
| | | | 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 L | inked Entities Text F | Fields Image Limits | CLS Restrictions MT920 | Domestic Professional | | | |
| | Issuer Cards Link | ed Account KYC Details | Joint Venture Accoun | t Details NSF Black list st | atus Documents Chan | ge Log | | | |
| | Maker | Da | ate Time: | Mod No | | | | | |
| | Checker | | | Record Status | | Exit | | | |
| | | Da | ate Time: | Authorization Status | | Ean | | | |

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 | | | | |
| Туре | Individual Corporate Bank | Full Name Short Name * Branch Code | | Customer Category * | Private Customer |
| Customer No * | P | | | | |
| Personal Corporate Ad | dditional Director Auxiliar | ry 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 Tax Group Exposure Exposure Category Customer Classification External Reference | 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 | Name Value - Relationship Manager RM ID RM Name - Combined Statement PI Frequency Statement Day | an = |
| Number Location FX Netting Customer Media SSN | Standing Instructions | Linked Entities Text F | ields Image Limits | CLS Restrictions MT920 | I Domestic Professional |
| | | ails Joint Venture Account Date Time: Date Time: | | | |

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.

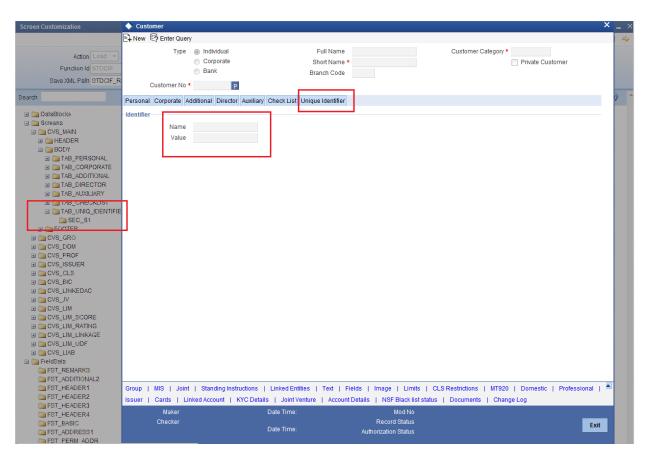


Fig 3.3.5: Section 'Unique Identifier' moved to a new tab



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