Development of Dashboard Forms Oracle FLEXCUBE Universal Banking Release 14.4.0.2.0 Part No. F36581-01 [November] [2020]



Table of Contents

1	Pref	eface								
	1.1	Audience	3							
	1.2	Related Documents	3							
2	Intro	oduction	4							
3	Creating Dashboard Form									
		1 Preferences								
	3.2	Data Sources	5							
	3.3	Data Blocks	6							
		Block Fields								
	3.4	Summary	8							
4		neration of units								
5	Use	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

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

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.

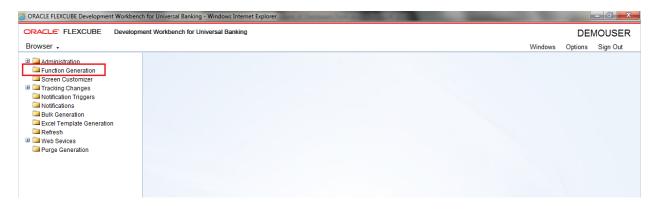


Fig 5.1: Function Generation tab

- 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		-	>
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Action New Function Id Save XML Path Search Preferences DataSource ListOfValues DataBlocks Screens FieldSets Actions CallForms LaunchForms Summary	Function Type Parent Parent Function Parent Xml	Function Category Maintenance Header Template Footer Template Transaction Summary ObstabBoard Others	
I	Fig 5.2: Selecting Function Cat	tegory	

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**.

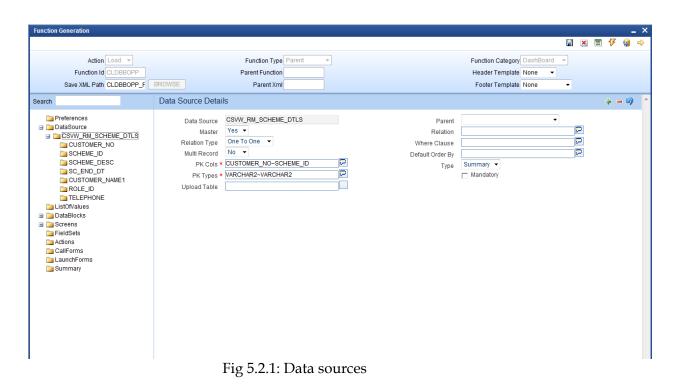
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

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Action Load 👻	Function 1	Type Parent 👻		Function Category DashBoard	-				
Function Id CLDBBOPP	Parent Fund	tion		Header Template None 👻					
Save XML Path CLDBBOPP_F	BROWSE Parent	Xml		Footer Template None -					
arch	Preferences					Ľ	9		
Preferences	🗖 Head Office F	unction	Module	CS 🗾					
DataSource ListOfValues	🗖 Logging Requ	uired	Module Description	Core					
DataBlocks	Auto Authoriza	ation	Branch Program Id						
🛾 🚞 Screens	🗖 Tank Modifica	tions	Process Code						
i FieldSets	Field Log Req	luired	SVN Repository URL						
CallForms	Multi Branch A		Transaction Block						
🗀 LaunchForms 🗀 Summary	Excel Export F	Required	Name Transaction Field	Choose Field -					
			Name						
			Contro						
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	CLDBBOPP	CS	×=	Core					
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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

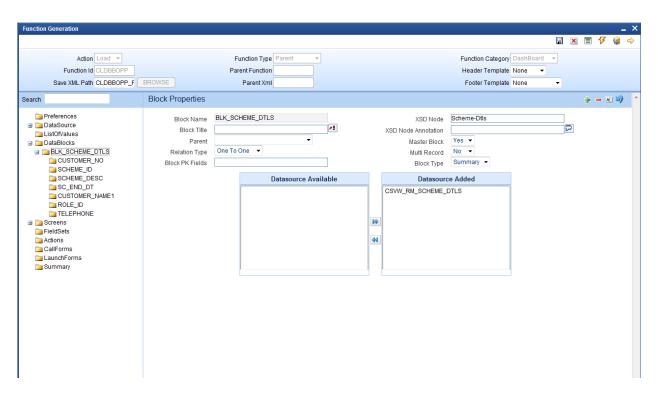


Fig 5.3.1: Data blocks

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.

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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	•
Search	Block Field Properties			- 🗷 🗔 🌍 🤺
Preferences DataSource ListOValues DataBlocks DataBlocks DLSTOME_NO SCHEME_DTLS SCHEME_DO SCHEME_DD SCHEME_DD CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 Screens FieldSets Addons CaliForms LaunchForms LaunchForms	Field Name • CUSTOMER_NO Field Label LBL_CUSTID FE DataSource CSWW_RM_SCHEME_DTLS Column Name • CUSTOMER_NO Data Type • Varchar2 • Display Type LINK • Item Type Database Item • Parent Field • Related Block • Related Block • Related Field • CUSTOM Reme • Custom Attributes Events DashBoard Link	XSD Annotation Field Size * Maximum Length Minimum Value Maximum Value Maximum Decimals TextArea Rows 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	Function Name	+ -
	Column •	Standard	CODSCMQY	

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.

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Action Load *								Constant 2	Type Parent						Constant C	Category DashBo					
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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.



Development of Dashboard Forms [November] [2020] Version 14.4.0.2.0

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