Development of Dashboard Form Oracle FLEXCUBE Investor Servicing Release 14.5.0.0.0 [May] [2021]





# **Table of Contents**

1	Pre	reface						
	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	Use	er Maintenance	10					
v	000	, Maintonaneo						

### 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.pdf 05-Development\_WorkBench\_Screen\_Development-II.pdf

# 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.

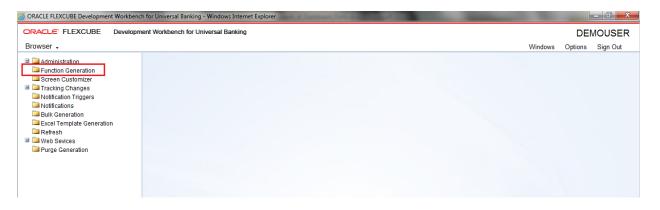


Fig 5.1: Function Generation tab

- 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							_ >
			-	×	= 1	- 🧐	⇔
Action New  Function Id Save XML Path Search Preferences DataSource ListOVAlues DataBlocks Screens FieldSets Actions CallForms LatonForms	Function Type Parent  Parent Function Parent Xml	Footer Template	Maintenance 👻 Maintenance Report				
🔁 Summary							
	Fig 5.2: Selecting Fun	nction 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**.

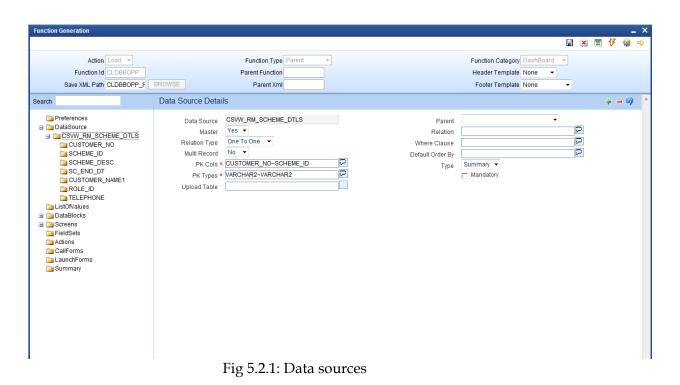
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

Action Load -		Type Parent		Tuncion Outegoly	- I I I I I I I I I I I I I I I I I I I	8		
Function Id CLDBBOPP	Parent Fund			Header Template None 👻				
Save XML Path CLDBBOPP_F	BROWSE	Xml		Footer Template None	•			
arch	Preferences					9	2	
Preferences	🖂 Head Office F	unction	Modul	e CS 🗾				
I 🚞 DataSource	Logging Requ	uired	Module Descriptio					
DataBlocks	Auto Authoriza	ation	Branch Program I	d				
Creens Screens	🗖 Tank Modifica	tions	Process Cod	e				
FieldSets     Actions	Field Log Red	quired	SVN Repository UR	L				
CallForms	🗖 Multi Branch /		Transaction Bloc					
LaunchForms	Excel Export F	Required	Nam Transaction Field					
🔁 Summary			Nam	e				
					Control String 4	1		
	Function Id		Module *	Module Description		*		
	CLDBBOPP	CS	*	Core				
	CLSBBOPP	CS	*	Core				
						-		

Fig 5.1.1: Selecting the Preferences

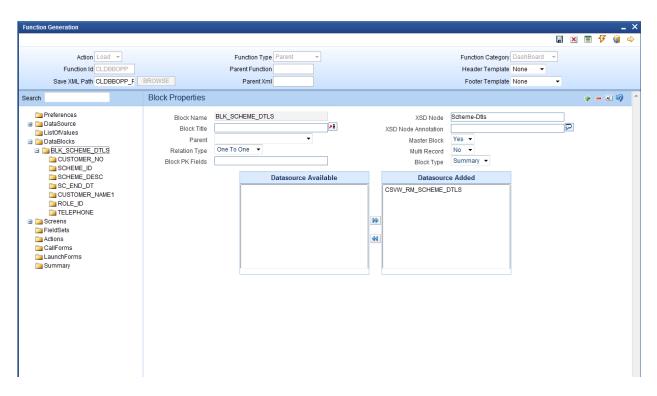
### 3.2 Data Sources

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





#### 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 Search	Function Type Parent Parent Function BROWSE Parent Xml Block Field Properties	▼ ] ]	Function Category DashBoard Header Template None  Footer Template None	- M Q Ø
Preferences DataSource ListONatues DataBlocks DistONatues DataBlocks DistOnteme_INO CUSTOMER_NO CUSTOMER_ID CUSTOMER_DESC CUSTOMER_NAME1 CUSTOMER_ID CUSTOMER_NAME1 CUSTOMER_ID CUSTOMER_	Field Name  CUSTOMER_NO Field Label DataSource CSWW_RM_SCHEME_DTLS Column Name  CUSTOMER_NO DataType  Varchar2  Uisplay Type UINK Related Field Related Field LOV Name Fieldset Name Fieldset Name	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 in Xsd     Report Parameter
LaunchForms	Custom Attributes Events DashBoard Link Level Column	Link Type Standard -	Function Name 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.

																			<b>I</b>	🧐 🛹
Action Load +								Funcho	on Type P		*				Function	n Category DashBo	ard -	7		
Function Id CLDBPNAU							1	Parent Fi								Templale None	¥			
Save XML Pain CLOBPNAU F BROWSE									ent Xmi							Template None		-		
Search					Cummer	y Details														36) ^
Search					Summan	y Detans														21-11
	eferences alaSource					Title						×5		Default Where Clause						
	stOfValues					Data Blocks		UNAUTI			*			Default Order By						
	alaBlocks					lata Source			TH_TRNS		•			Multi Branch Where Clause						
Sc     S	reens eidSels					nmary Type					*			Main Summary Screen						
Ac	tions				Summary	Screen Size	MO OF	200							WebSei	Nices				
	allForms unchForm														Require	d				
	unchi-onn Immary	5			Data Bloc	k Fields	Custom E	Butions	Fields Or	rdering										
							De	ata Bloc	ck Fields						Query	LOV Name	\$			
														CUSTOMER_ID				-		
														ACNO				<u> </u>		
												44		OCYY	<b>Г</b>			- -		
														AMOUNT	E					
												44		MODULE_CODE						
														EVENT	E					
														AC_TYPE	<b>—</b>			·		
													<b>~</b>	BRANCH_CODE	Г					
								•	,											
																		•	• <b>F3</b> mo	re 🔺
									Custome	er ID	Accor	unt Nu	imbe	r Currency An	nount	Module Co	de		Event	
								•												-

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 Form [May] [2021] Version 14.5.0.0.0

Oracle Financial Services Software Limited Oracle Park Off Western Express Highway Goregaon (East) Mumbai, Maharashtra 400 063 India

Worldwide Inquiries: Phone: +91 22 6718 3000 Fax:+91 22 6718 3001 www.oracle.com/financialservices/

Copyright © [2007], [2021], Oracle and/or its affiliates.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.