Development of Dashboard Form Oracle FLEXCUBE Investor Servicing Release 14.5.2.0.0 [November] [2021]

FINANCIAL SERVICES



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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.

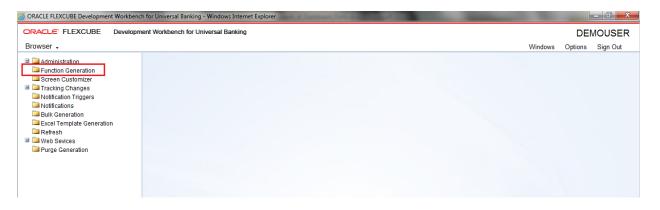


Fig 5.1: Function Generation tab

- 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**.

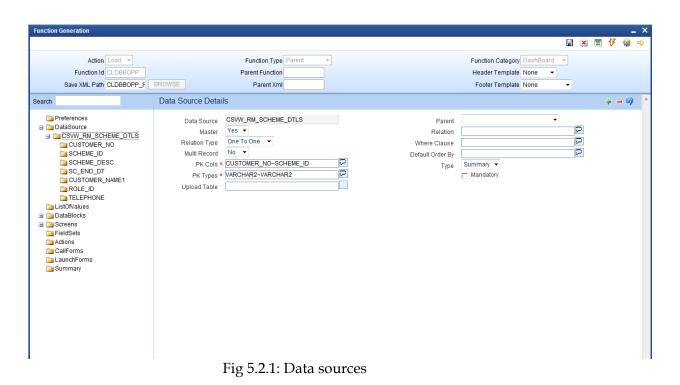
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

| 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 | | | | |
| | | | | | | - | | |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |

Fig 5.1.1: Selecting the Preferences

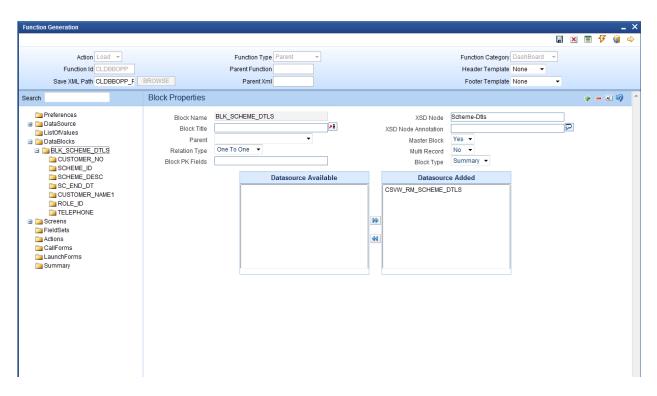
3.2 Data Sources

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





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.

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|--|------------------------|---|--|--|-----------|-------------|----------|-----------|-----------|---------|-------|--------|----------|------------------------------|----------|-------------------|-------|----------|----------------|-------|
| 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 | | | | - | | |
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| | | | | | | | | | | | | 44 | | OCYY | Г | | | - - | | |
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| | | | | | | | | | | | | 44 | | MODULE_CODE | | | | | | |
| | | | | | | | | | | | | | | EVENT | E | | | | | |
| | | | | | | | | | | | | | | AC_TYPE | — | | | · | | |
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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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