Development of Dashboard Forms Oracle Banking Corporate Lending Release 14.5.3.0.0 [Nov] [2021]



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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.docx 05-Development_WorkBench_Screen_Development-II.docx

2 Introduction

This document provides information on:

- <u>Chapter 2 , "Introduction"</u>
- <u>Chapter 3 , "Creating Dashboard Form</u>"
- <u>Chapter 4 , "Generation of Units"</u>
- <u>Chapter 5 , "User Maintenance</u>"

3 Creating Dashboard Form

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

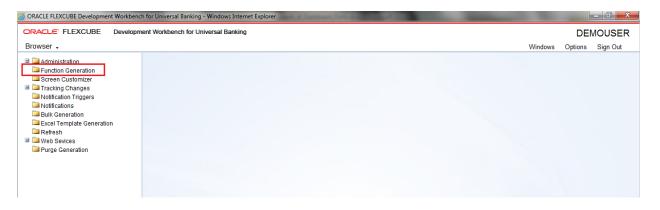


Fig 5.1: Function Generation tab

- 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 | | - | |
|---|--|--|---|
| | | 🖫 🗵 🗐 🎸 🍕 | ⇔ |
| Action New Function Id Save XML Path Search Preferences DataSource ListOfValues DataBlocks Screens FieldSets Actions CallForms LaunchForms | Function Type Parent Parent Function Parent Xml | Function Category Maintenance Header Template Maintenance Report Footer Template Transaction Summary DashBoard Others | |
| 🔁 Summary | Fig 5.2: Selecting Function Cate | egory | |

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**.

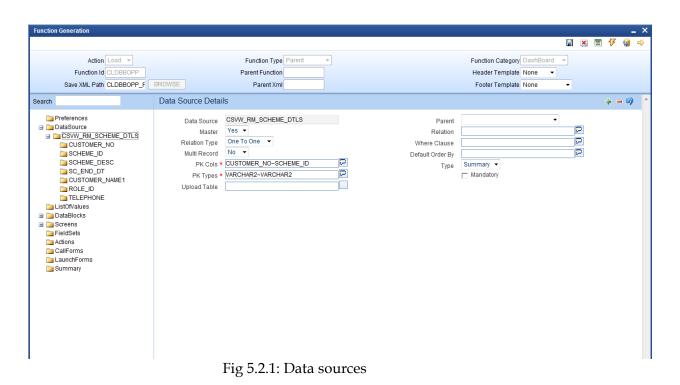
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

| Action Load - | Function 1 Parent Func | Type Parent | | Function Category DashBoard | | • 🥵 | | | |
|---|---|---|---|-----------------------------|---|-----|--|--|--|
| Save XML Path CLDBBOPP_F | BROWSE Parent | Xml | | Footer Template None | • | | | | |
| arch | Preferences | | | | | 9 | | | |
| Preferences DataSource ListOt/values DataBlocks Soreens FieldSets Actions CallForms LaunchForms Summary | Head Office F Logging Requ Auto Authoriza Tank Modifica Field Log Ree Multi Branch A Excel Export R | uired ation tions quired Access | Module Module Description Branch Program Id Process Code SVN Repository URL Transaction Block Name Transaction Field Name | Core Choose Block | | | | | |
| | | | | Control String + | | | | | |
| | Function Id | | Module * | Module Description | | | | | |
| | CLDBBOPP | CS CS | | Core | | | | | |
| | | | | | | - | | | |

Fig 5.1.1: Selecting the Preferences

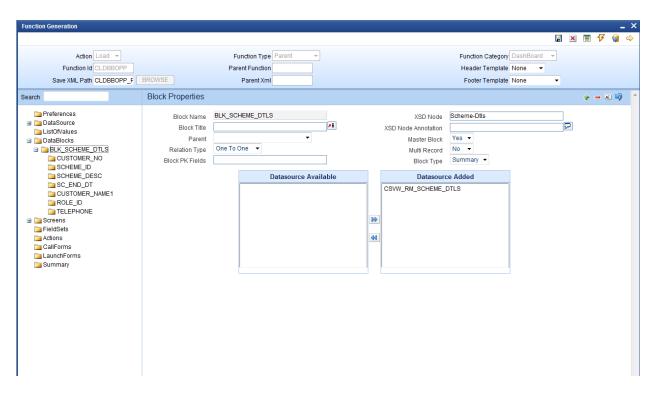
3.2 Data Sources

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 | Function Type Parent Parent Function BROWSE Parent Xml | ▼]] | Function Category DashBoard Header Template None Footer Template None | • |
| Search | Block Field Properties | | | - 🗷 🗔 🌍 🤺 |
| Preferences DataSource DataSource DataBlocks DataBlocks DLSCHEME_DTLS CUSTOMER_NO SCHEME_DD SCHEME_DD SCHEME_DD CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 ROLE_ID TELEPHONE CUSTOMES CallForms LaunchForms LaunchForms SUBJECC | Field Name • CUSTOMER_NO Field Label EL_CUSTID /= DataSource CSW_RM_SCHEME_DTLS Column Name • CUSTOMER_NO Data Type • Varchar2 ~ Display Type LINK ~ Item Type Database Item ~ Related Block ~ Related Block ~ Related Block ~ Related Block ~ Related Block ~ Related Block ~ Related Steld ~ LOV Name ~ Fieldset Name ~ | XSD Annotation Field Size * Maximum Length Minimum 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 |
| Summary | | | | + - |
| | 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.

| Fenctio | n Generatio | 8 | | | | | | | | | | | | | | | | | | × |
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| | | Action Lo | ad + | | | | | Function T | ype Parent | * | | | | Functio | n Category DashBoa | | - | | | |
| | | ction Id CL | | | | | | arent Func | | | | | | | r Templale None | ¥ | | | | |
| | Save XM | IL Palh CL | .OBPNAL | J_F | | | | Parent | Xmi | | | | | Foole | r Template None | | • | | | |
| Search | | | | | Summai | ry Details | | | | | | | | | | | | | Z Ø | ~ |
| | | | | | | · | | | | | | | | | | | | | | |
| | Preferences DataSource | | | | | Title | PM of a | | | | *5 | | Default Where Clause | | | | | | | |
| | ListOfValue | s | | | | Data Blocks Data Source | | UNALITH | TONO | * | | | Default Order By | | | | | | | |
| | DalaBlocks Screens | | | | | nmary Type | Summ | | | ¥ | | | Multi Branch Where Clause | | | | | | | |
| | FieldSels | | | | | Screen Size | Mediu | | | * | | | Main Summary Screen | | | | | | | |
| | Actions CaliForms | | | | | | | | | | | | | C WebSe Require | nvices en | | | | | |
| | LaunchForr | ns | | | Data Bloc | - Fields D | uniom Di | alone Ev | elds Ordering | | | | | | | | | | | |
| | Summary | | | | CARA END | IK Plenos - Ca | 4810111-04 | | elds ordering | | | | | | | | | | | |
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| | | | | | | | Dat | ita Block I | Fields | | | | Fields Selected | Query | LOV Name | } | * | | | |
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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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