

Development Workbench – Screen Customizer
Oracle FLEXCUBE Investor Servicing
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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:

<i>Proficiency</i>	<i>Resources</i>
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 FLEXCUBE Development Workbench for Universal Banking	User Manuals

1.2 Related Documents

[04-Development WorkBench Screen Development-I.pdf](#)
[05-Development WorkBench Screen Development-II.pdf](#)

2 Introduction

This document gives information about the following topics:

- [Chapter 2, "Introduction"](#)
- [Chapter 3, "Screen Customizer"](#)
- [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.

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

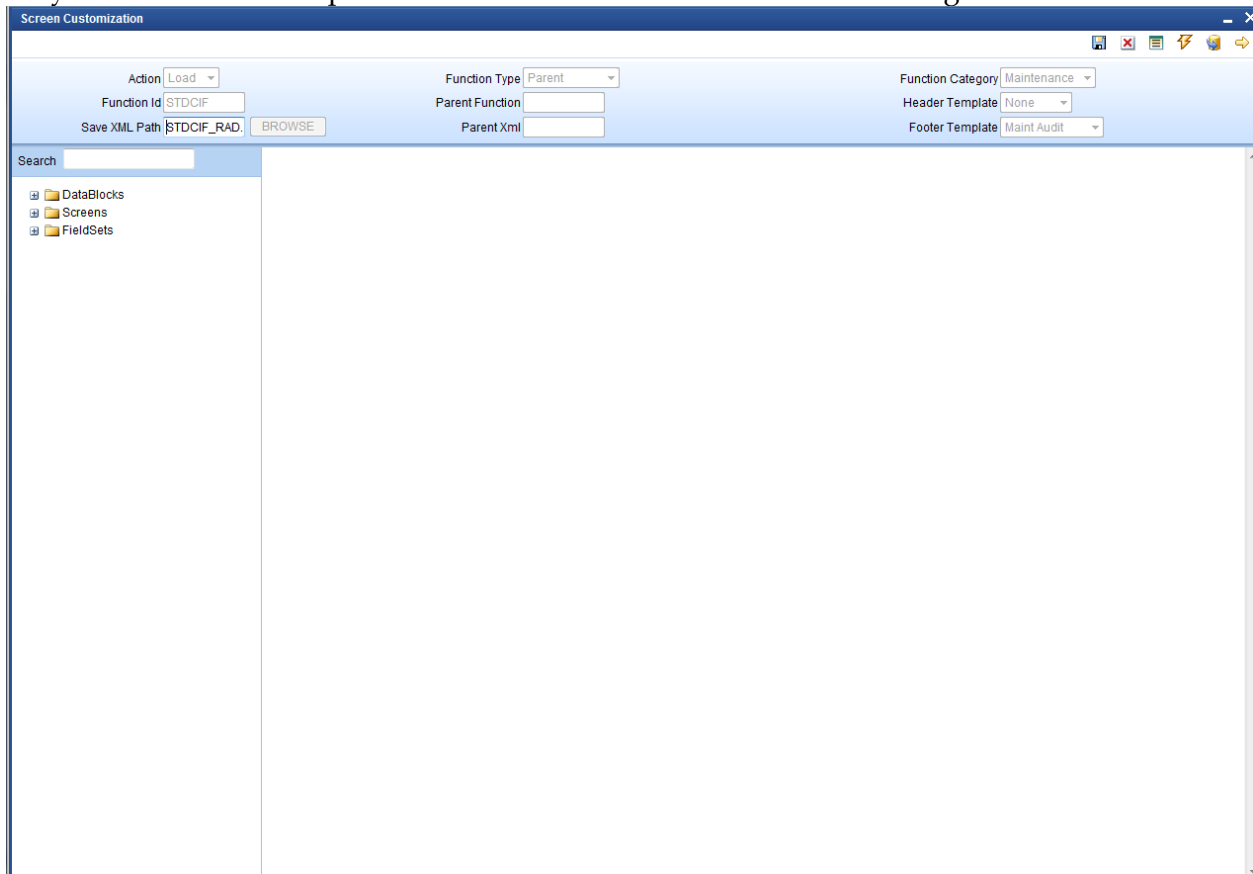


Fig 3.1: Screen Customizer Screen

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

Action: Load | Function Type: Parent | Function Category: Maintenance
Function Id: STDCIF | Save XML Path: STDCIF_RAD | BROWSE | Parent Function: | Parent Xml: | Header Template: None | Footer Template: Maint Audit

Block Field Properties

Field Name: FLDNAM | XSD Tag: FLDNAM
Field Label: LBL_FLDNAM | XSD Annotation: | Field Size: |
DataSource: STWWS_CUST_LIAB_UDF | Maximum Length: 105
Column Name: FIELD_NAME | Minimum Value: |
Data Type: Varchar2 | Maximum Value: |
Display Type: Text | Maximum Decimals: |
Item Type: Database Item | TextArea Rows: |
Parent Field: | TextArea Columns: |
Related Block: | Default Value: |
Related Field: | Preview Value: |
LOV Name: | Mask Id: |
Off Line LOV Name: |
Fieldset Name: FST_LIAB_UDF

☐ Required
☒ Visible
☐ Read Only
☐ Calendar Text
☐ Popup Edit Required
☐ Uppercase Only
☒ LOV Validation Required
☐ Input by LOV Only
☐ Not Required In Xsd
☐ Report Parameter

Attribute Name	Attribute Value	Active	Position

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

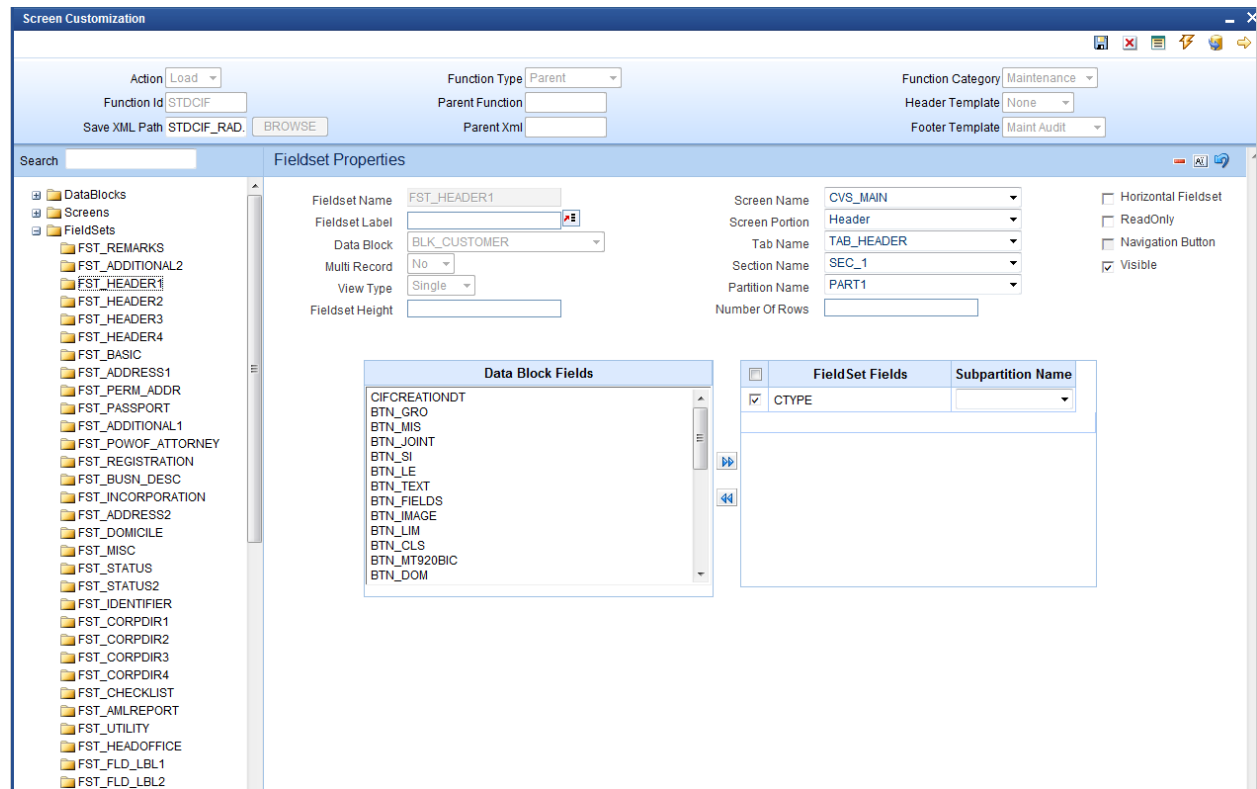


Fig 3.3.1: Field sets in Screen Customizer

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

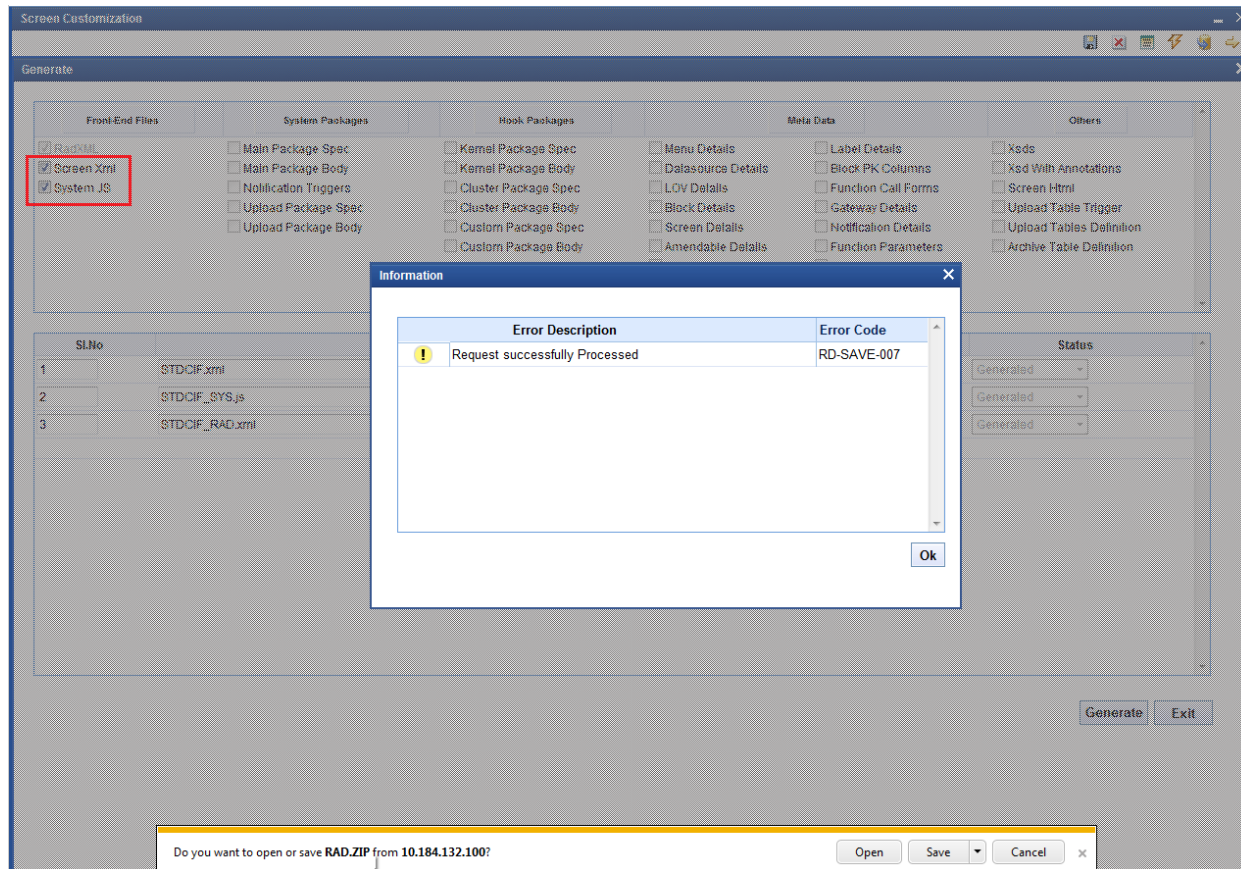


Fig 4.1: Generation of files in Screen Customizer

5 Examples

Example 1:

Requirement: Hide a Field in the screen

Below screenshots shows how Screen Customizer can be used for this purpose.

Screen Customization

Customer

New Enter Query

Type ☒ Individual ☐ Corporate ☐ Bank

Full Name Customer Category * ☐ Private Customer

Short Name *

Branch Code

Customer No *

Personal Corporate Additional Director Auxiliary Check List

Domicile Address Status Identifier

☐ Same as Permanent Address

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 Number

Location

FX Netting Customer

Media

SSN

☐ Frozen

☐ Deceased

☒ Whereabouts Unknown

☐ Eligible for AR-AP Tracking

☐ CRM Customer

☐ Mellers Required

☐ CLS Participant

☐ Issuer Customer

☐ Treasury Customer

☐ Joint Customer

☐ MT920

☐ Relationship Pricing

☒ ELCM Customer

ELCM Customer Number

CIF Status

Since

Name

Value

Relationship Manager

RM ID

RM Name

Combined Statement Plan

☐ Auto Generated Statement Plan

Frequency

Statement Day

Group | MIS | Joint | Standing Instructions | Linked Entities | Text | Fields | Image | Limits | CLS Restrictions | MT920 | Domestic | Professional |

Issuer | Cards | Linked Account | KYC Details | Joint Venture | Account Details | NSF Black list status | Documents | Change Log

Maker Date Time: Mod No

Checker Date Time: Record Status

Authorization Status

Exit

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

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

Screen Customization

Action: Load Function Type: Parent Function Category: Maintenance

Function Id: STDCIF Parent Function: Parent Xml: Save XML Path: STDCIF_RAD. BROWSE Header Template: None Footer Template: Maint Audit

Search: Block Field Properties

Field Name: WHRUNKN XSD Tag: WHRUNKN

Field Label: LBL_WHRUNKN XSD Annotation: Visible

Data Source: STTMS_CUSTOMER Field Size: 1

Column Name: WHEREABOUTS_UNKNOWN Maximum Length: Minimum Value: Maximum Value: Text Area Rows: Text Area Columns: Default Value: N Preview Value: Mask Id:

Data Type: Char Display Type: CheckBox Item Type: Database Item Parent Field: Related Block: Related Field: LOV Name: Off Line LOV Name: Fieldset Name: FST_STATUS

Custom Attributes Events

Attribute Name	Attribute Value	Active	Position
OFF	N	Yes	1
ON	Y	Yes	2

Fig 3.3.2: Setting the field invisible

The screenshot shows a 'Customer' form with the following sections and fields:

- Top Section:** Type (Individual, Corporate, Bank), Full Name, Short Name, Branch Code, Customer No, Customer Category, and Private Customer checkbox.
- Personal Tab (Active):**
 - Domicile Address:** Same as Permanent Address checkbox, Address 1-4, Pin Code, Country.
 - Status:** Frozen, Deceased (highlighted with a red box), Eligible for AR-AP Tracking, CRM Customer, Mailers Required, CLS Participant, Issuer Customer, Treasury Customer, Joint Customer, MT920, Relationship Pricing, ELCM Customer.
 - Identifier:** Name, Value.
 - Relationship Manager:** RM ID, RM Name.
 - Combined Statement Plan:** Auto Generated Statement Plan checkbox, Frequency, Statement Day.
 - Misc Details:** SWIFT Code, Credit Rating, Group Code, Charge Group, Clearing Group, Tax Group, Exposure, Exposure Category, Customer Classification, External Reference Number, Location, FX Netting Customer, Media, SSN.
- Bottom Section:** Navigation bar with tabs (Group, MIS, Joint, Standing Instructions, Linked Entities, Text, Fields, Image, Limits, CLS Restrictions, MT920, Domestic, Professional, Issuer, Cards, Linked Account, KYC Details, Joint Venture, Account Details, NSF Black list status, Documents, Change Log) and a footer with Maker, Checker, Date Time, Mod No, Record Status, Authorization Status, and an Exit button.

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

Type: ☒ Individual ☐ Corporate ☐ Bank

Full Name: Short Name: Branch Code:

Customer Category: ☐ Private Customer

Customer No: P

Personal **Corporate** **Additional** **Director** **Auxiliary** **Check List**

Domicile Address

☐ Same as Permanent Address

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 Number: Location: FX Netting Customer: Media: SSN:

Status

☐ 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

ELCM Customer Number: CIF Status: Since:

Identifier

Name: Value:

Relationship Manager

RM ID: RM Name:

Combined Statement Plan

☐ Auto Generated Statement Plan

Frequency: Select Statement Day:

Group | MIS | Joint | Standing Instructions | Linked Entities | Text | Fields | Image | Limits | CLS Restrictions | MT920 | Domestic | Professional | Issuer | Cards | Linked Account | KYC Details | Joint Venture | Account Details | NSF Black list status | Documents | Change Log

Maker: Date Time: Mod No: Record Status: Authorization Status:

Checker: Date Time: Exit

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.

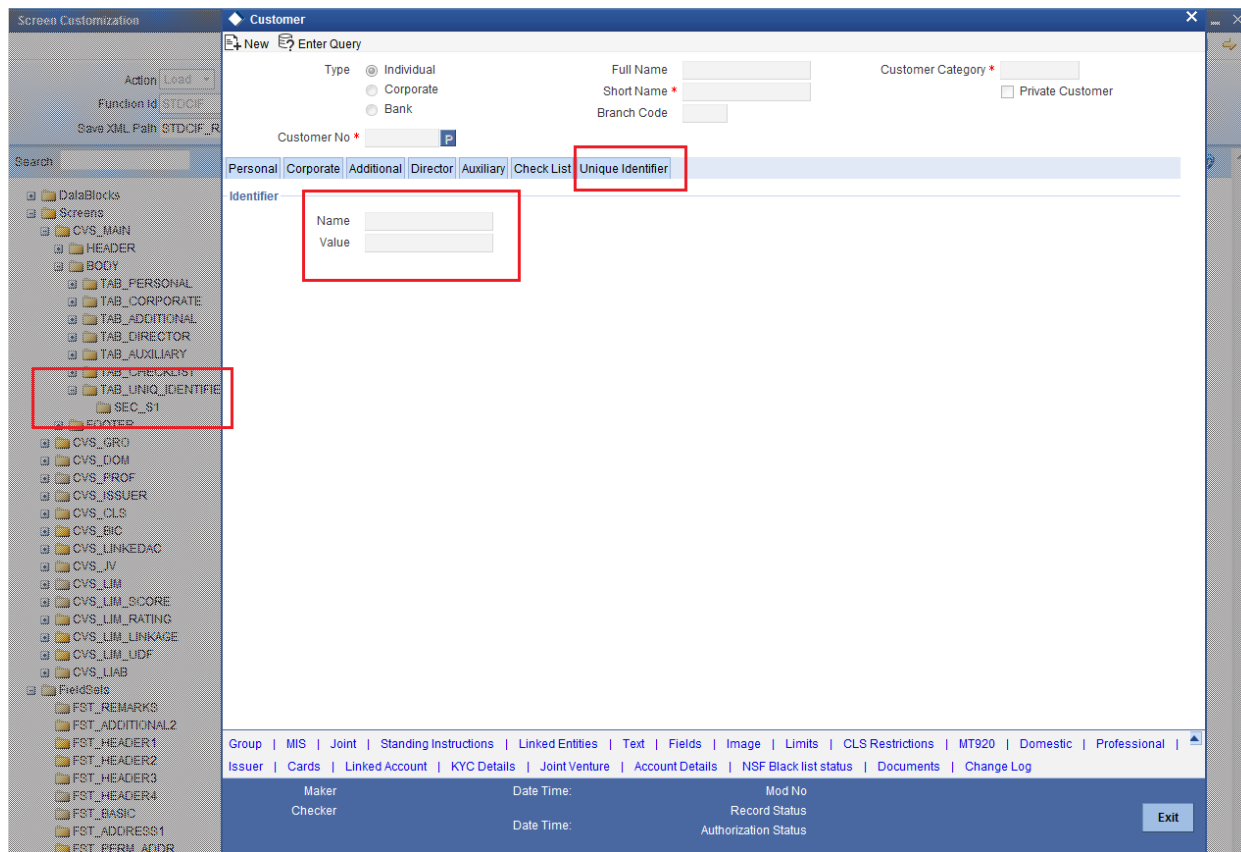


Fig 3.3.5: Section 'Unique Identifier' moved to a new tab



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