Development Workbench – Screen Customizer Oracle Banking Treasury Management Release 14.6.1.0.0 [August] [2022]



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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:

| 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 |
| 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

<u>04-Development_WorkBench_Screen_Development-I.docx</u> <u>05-Development_WorkBench_Screen_Development-II.docx</u>

2 Introduction

This document gives information about the following topics:

- <u>Chapter 2 , "Introduction"</u>
- Chapter 3 , "Screen Customizer"
- <u>Chapter 4</u>, "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

| creen Customization | | | | | |
|---------------------------|-------------------|----------|-------------------------------|----------|---|
| | | | | 🖬 🗶 🗏 7 | 9 |
| Action Load 👻 | Function Type | Parent 👻 | Function Category Maintenance | - | |
| Function Id STDCIF | Parent Function | | Header Template None 🔻 | | |
| Save XML Path STDCIF_RAD. | BROWSE Parent Xml | | Footer Template Maint Audit | • | |
| irch | | | | | |
| DataBlocks | | | | | |
| Creens Screens | | | | | |
| i FieldSets | | | | | |
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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 | | | | |
|--|---|--|---|---|
| | | | | 🔚 🗶 🗏 7 🤤 |
| Action Load ~ Function Id STDCIF Save XML Path STDCIF_RAD. | Function Type Parent Parent Function BROWSE Parent Xml Block Field Properties | • | Function Category Ma Header Template No Footer Template Ma | aint Audit 👻 |
| Search DataBlocks BLK_CUSTOMER BLK_CUSTCORP BLK_CUSTCORPOIR BLK_CUSTCORPOIR BLK_CUSTCORPOIR BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTROF BLK_LISSUERLMTS BLK_LIAB_SCORE BLK_LIAB_NEVAGE BLK_LIAB_NEVAGE BLK_LIAB_UDF ELONAM FLOVAL DATATYP VALTYP BLK_CUSTSEGMENT SCREens BLK_ISSUERLMTS BLK_LIAB_NEVAGE BLK_CUSTSEGMENT BLK_CUSTSEGMENT BLK_SCRENS BLK_FLASUERLMTS BLK_SCRENS | Block Field Properties | XSD Tag XSD Annotation Field Size • Maximum Length Maximum Value Maximum Value Maximum Decimals TextArea Columns Default Value Wask Id Attribute Value | FLDNAM Image: Constraint of the second sec | Required Visible Read Only Calender Text Popup Edit Require Uppercase Only COV Validation Required Input by LOV Only Not Required In Xac Report Parameter |

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

| | | | 7 |
|---------------------------|--|-------------------------------|--|
| | | | E 77 🧐 |
| Action Load 👻 | Function Type Parent | Function Category Maintenance | |
| Function Id STDCIF | Parent Function | Header Template None | |
| Save XML Path STDCIF_RAD. | BROWSE Parent Xml | Footer Template Maint Audit | |
| earch | Fieldset Properties | | - A 🧳 |
| | Fieldset reported Fieldset Name FST_HEADER1 Fieldset Label Data Block BLK_CUSTOMER Multi Record No ~ View Type Single ~ Fieldset Height Data Block Fields CIFCREATIONDT BTN_SIN BTN_SI | Screen Portion Header | ontal Fieldset Only ation Button |

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

| Screen Cust Generate | omizatio | 0 | | | | | | | | | | | | | | | | | | | 8 | 4 🔳 1 | 7 🌖 (|
|----------------------------|-----------|-------|----------|------------|------------------------|----------------------|-----------------|--------------------------|---|--|----------|-----------------------|---|----------------------|---------|--|---|-----|-------------|--|---|------------|-----------|
| | Front-End | Files | | | System Pa | aokages | | | Hook | Paokages | | | | | Meta Da | a | | | | | Others | | * |
| Screen Screen System | n Xrril | | | Main P | stion Trigi Package | ody gers ⊱Spec | | Chu Chu Chu Chu | mel Pack: ister Pack ister Pack stom Pac | age Spec age Body age Spec age Body kage Spe kage Bod | c | Da LO Blo Sc | nu Detail Iasource V Delails ock Detail reen Dela sendable | Details S Ills | | Label Det Block PK Function (Gateway I Notification Function I | Columns Call Form Details in Details | IS | 0 0 0 | ed Wilh A creen Htt pload Ta pload Ta | nnotations ni ble Trigge bles Delini ble Delini | r ilion | |
| | | | | | | | Informat | tion | | | | | | | | | | × | | | | | |
| | No | | | | | | | | En | ror Desci | ription | | | | E | rror Code | e | ^ | | | tatus | | |
| 1 | | STE | CIF.xml | | | | | Req | lest succ | cessfully | Processe | ed | | | R | D-SAVE- | 007 | | | | URIUS | | |
| 2 | | | CIF SYS | Lis | | | | | | | | | | | | | | | | | - | | |
| 3 | | STE | ICIF_RAD |).xml | | | | | | | | | | | | | | | Genera | | • | | |
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| | | D | o you wa | nt to open | or save F | RAD.ZIP f | rom 10.1 | 84.132.10 | 0? | | | | | | | Open | | ave | • | ancel | × | | |

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.

| ◆ Customer | | | × 🖬 🗶 🗏 1 |
|---|---|---|-------------|
| 🕞 New 🔄 Enter Query | | | Ţ |
| Type 💿 Individual | Full Name | Customer Category * | |
| Corporate | Short Name * | Private Customer | |
| S 💿 Bank | Branch Code | | |
| Customer No * | | | - <u>A:</u> |
| la Personal Corporate Additional Director Auxilia | ary Check List | | |
| Per Domicile Address | Status | Identifier | |
| C1 | | | |
| C\ Same as Permanen Address | | Name | |
| Address 1 | Deceased | Value | |
| Address 2 | Whereabouts U | - Relationship Manager | |
| CV Address 3 | Eligible for AR-A | P RM ID | + |
| Address 4 | Tracking | RM Name | |
| CV Pin Code | CRM Customer Mailers Require | d a transformer | eld Active |
| C Country | CLS Participant | | E 👻 Yes 💌 |
| | Issuer Custome | Auto Generated Statem Plan | ient Yes 👻 |
| Misc Details | Treasury Custor | _ | |
| SWIFT Code | Joint Customer | Statement Day | |
| CV Credit Rating | MT920 | olatomon bay | |
| C\ Group Code | Relationship Pri | cipa | |
| Charge Group | ✓ ELCM Custome | | |
| Clearing Group | ELCM Customer | | |
| Tax Group | Number | | |
| Exposure | CIF Status | | |
| Exposure Category | Since | | |
| Customer | | | |
| Classification External Reference | | | |
| Number | | | |
| Location | | | |
| FX Netting Customer | | | |
| Media | | | |
| SSN | | | * |
| Group MIS Joint Standing Instructions | Linked Entities Text Fields Image I | Limits CLS Restrictions MT920 Domestic Professi | onal 🛋 |
| Issuer Cards Linked Account KYC De | tails Joint Venture Account Details NSF Bla | ck list status Documents Change Log | |
| Maker | Date Time: Mod | | |

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

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

| en Customization | | | | | | |
|------------------------|----------------------------|---------------------------------------|------------------|-------------|--------------|---|
| | | | | | | Image: Image: Image |
| Action Load 👻 | Function Ty | rpe Parent 👻 | Function | Category Ma | iintenance 👻 | |
| Function Id STDCIF | Parent Functi | ion | Header T | emplate No | ne 🔻 | |
| Save XML Path STDCIF_R | AD. BROWSE Parent X | [m] | Footer T | emplate Ma | iint Audit 👻 | |
| ch | Block Field Properties | | | | | Q |
| ADDRLN3 | • | | | | | |
| DDRLN2 | Field Name * WHRUNKN | | XSD Tag WHRUNKN | | | equired |
| DDRLN4 | Field Label LBL_WHRUNKN | ×E | XSD Annotation | \sim | | sible |
| COUNTRY | DataSource STTMS_CUSTOME | ER | Field Size * | _ | | ead Only |
| SNAME | Column Name * WHEREABOUTS_ | | | | | alender Text |
| NLTY | | onnavon | Maximum Length | | - | |
| LBRN | Data Type * Char 👻 | | Minimum Value | | | opup Edit Requ |
| CCATEG | E Display Type CheckBox | • | Maximum Value | | □ U | ppercase Only |
| FULLNAME CIFCREATIONDT | Item Type Database Item 👻 | r | Maximum Decimals | | | OV Validation |
| ISELCMCUST | Parent Field | Ŧ | TextArea Rows | | R | equired |
| ELCMCUSTNO | Related Block | ~ | | | E In | put by LOV Only |
| AR_AP_TRACKING | Related Field | | TextArea Columns | | L N | ot Required In 3 |
| EXPONTRY | | | Default Value N | * E | | eport Paramete |
| | LOV Name | · · · · · · · · · · · · · · · · · · · | Preview Value | | | |
| | Off Line LOV Name | ~ | MaskId | * E | | |
| FROZEN | Fieldset Name FST_STATUS | | indon ra | | | |
| DEAD | Custom Attributes Events | | | | | |
| 🚞 WHRUNKN | Custom Autobiles Events | | | | | |
| CRRATE | | | | | | + - |
| i MEDIA | Attribute Name | | Attribute Value | Active | Position | - |
| i SSN | | | Attribute value | Active | rosidon | |
| C SWIFTCD | OFF | MI N | | Yes 🔻 | 1 | |
| 🚞 LOC | | | | | 0 | |
| 🚞 MAILRSREQD | I ON | ×≣ Y | | Yes 🔻 | 2 | |
| GRPCD | | | | | | |
| EXPCAT | | | | | | |
| CUSTCLASSEN | | | | | | |
| | | | | | | |
| CIFSTATSNC | | | | | | |
| | | | | | | |
| CUSTCLGGRP TAXGROUP | | | | | | |
| CLSPARTICIPANT | | | | | | - |
| FXNETTCUST | | | | | | |
| | | | | | | |

Fig 3.3.2: Setting the field invisible

| ľ | zation | | | | | | ×× | 8 | 7 🚱 |
|----------------------|----------------------|--------------------------------|----------------------------|-------------------------------|----------------------------|--------------------------|----------|----------|-----|
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| | 🖹 New 🦻 Enter Quen | 1 | | | | | | | |
| F | Туре | Individual | Full Name | | Customer Category * | | Â | | |
| Save | | Corporate | Short Name | * | | Private Customer | | | |
| 0.948 | | Bank | Branch Code | | | | | | |
| h | Customer No * | P | | | | | | A | |
| 🛄 DalaBloc | Personal Corporate A | dditional Director Auxiliary C | Check List | | | | | | |
| Screens | Domicile Address | | - Status | | Identifier | | | | |
|) (CVS_1) (CVS_0 | 2000000000 | Same as Permanent | otatao | - F | Name | | | | |
| 1 (10 CVS_1 | | Address | | Frozen | | | | | |
| CVS_ | Address 1 | | | Liereasen | Value | | | | |
| cvs_ | Address 2 | | | Eligible for AR-AP | -Relationship Manager- | | | | |
|) 🛅 CVS_(| Address 3 | | | Tracking | RM ID | | | + | _ |
| CVS_6 | Address 4 | | | CRM Customer | RM Name | | 2 | ctive | |
| | Pin Code | | | Mailers Required | | | | | |
| CVS_ | Country | | | CLS Participant | -Combined Statement Pla | | = Ye |)S ♥ | |
| | | | | Issuer Customer | | Auto Generated Statement | Ye | 95 * | |
| CVS_L | Misc Details | | | Treasury Customer | Frequency | Plan Select - | | | |
|) 🧰 CVS_(| SWIFT Code | | | Joint Customer | | | | | |
| | Credit Rating | | | MT920 | Statement Day | _ | | | |
| I CVS_L FieldSeld | Group Code | | | Relationship Pricing | | | | | |
| Presido en | Charge Group | | FLOW Quelense | ELCM Customer | | | | | |
| | Clearing Group | | ELCM Customer Number | | | | | | |
| | Tax Group | | CIF Status | | | | | | |
| | Exposure | | Since | | | | | | |
| | Exposure Category | | | | | | | | |
| | Customer | | | | | | | | |
| | Classification | | | | | | | | |
| | External Reference | | | | | | | | |
| | Number Location | | | | | | | | |
| | FX Netting Customer | | | | | | | | |
| | Media | | | | | | | | |
| | | | | | | | | | |
| | SSN | | | | | | | | |
| | Group MIS Joint | Standing Instructions | Linked Entities Text I | Fields Image Limits | CLS Restrictions MT920 | Domestic Professional | 1 🗖 | | |
| | Issuer Cards Lir | nked Account KYC Details | Joint Venture Accour | nt Details NSF Black list s | status Documents Chang | ge Log | | | |
| | Maker | [| ate Time: | Mod No | | | | | |
| | Checker | | | Record Status | | Exi | it | | |
| | | C | ate Time: | Authorization Status | | EX | | | |

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 Customer No * | Individual Corporate Bank ditional Director Auxiliar | Full Name Short Name * Branch Code | | Customer Category * |
| Domicile Address | | - Status | | - Identifier |
| Address 1 Address 2 Address 3 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 | Same as Permanent Address | ELCM Customer Number CIF Status Since | Frozen Deceased Whereabouts Unknown Eligible for AR-AP Tracking CRM Customer Mailers Required CLS Participant Issuer Customer Joint Customer Joint Customer MT920 Relationship Pricing ELCM Customer | Name Value - Relationship Manager RM ID RM Name |
| Location FX Netting Customer Media SSN Group MIS Joint | | | | CLS Restrictions MT920 Domestic Professional |
| Maker Checker | | Date Time: | Mod No Record Status Authorization Status | 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.

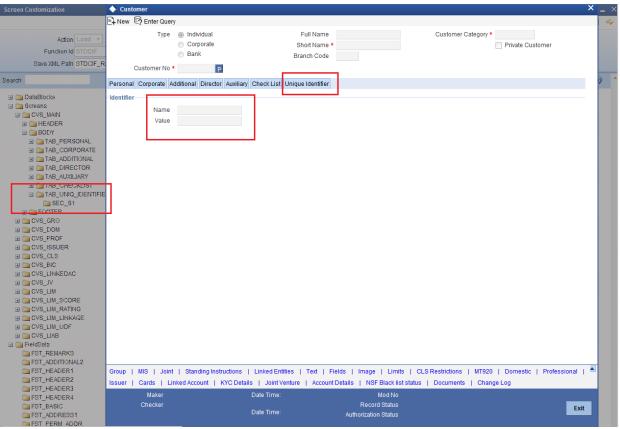


Fig 3.3.5: Section 'Unique Identifier' moved to a new tab



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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/

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