Development Workbench – Screen Customizer Oracle Banking Corporate Lending

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FINANCIAL SERVICES

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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

Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen <u>Development</u> Development II

Development Workbench - Screen Development II

2 Introduction

This document gives information about the following topics:

- Chapter 2, "Introduction"
- 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

reen Customization		
		🖫 🗶 🗏 🖗
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 👻
arch		
a 🗀 DataBlocks		
Creens Screens		
) 🧰 FieldSets		

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 Id STDCIF Save XML Path STDCIF_RAD. Search	Function Type Parent Parent Function BROWSE Parent Xml Block Field Properties	Function Category Maintenance Header Template None Footer Template Maint Audit
DataBlocks BLK_CUSTOMER BLK_CUSTCORP BLK_CUSTCORP BLK_CUSTCORP BLK_CUSTCORPOR BLK_CUSTOCOPOR BLK_CUSTOCHKLIST BLK_CUSTGRP BLK_CUSTGRP BLK_CUSTGNHOLD BLK_CUSTGNHOLD BLK_CUSTDMESTIC BLK_CUSTDMESTIC BLK_CUSTDMESTIC BLK_CUSTDMESTIC BLK_CUSTCHMEST BLK_UNKEDAC BLK_UNKEDAC BLK_LIAB SCORE	Field Name * FLDNAM Field Label LBL_FLDNAM DataSource STWS_CUST_LIAB_UDF Column Name * FIELD_NAME Data Type * Varchar2 ~ Display Type Text ~ DataDase Item ~ Parent Field ~ Related Field ~ LOV Name Off Line LOV Name Fieldset Name FST_LIAB_UDF Custom Attributes Events Related Field	XSD Tag FLDNAM Required XSD Annotation Visible Read Only Field Size • Read Only Calender Text Minimum Value Oppure Edit Required Uppercase Only Maximum Decimals Visible Required TextArea Rows Input by LOV Only Not Required in Xso V Default Value Report Parameter V Mask Id Fill
 BLK_LIAB_RATING BLK_LIAB_INKAGE BLK_LIAB_UDF FLDVAL DLATYP VALTYP BLK_CUSTSEGMENT Screens FieldSets 	Fig 3.1.1: Data Block	Attribute Value Active Position

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

creen Customization								
								🗄 🗵 🗏 7 🧐
Action Load Function Id STDCIF Save XML Path STDCIF_RAD.	BROWSE	Function Type Parent Parent Function Parent Xml	•			Heade	n Category Maintenand r Template None r Template Maint Audit	•
arch	Fieldset Pro	perties						- 🛛 🗳
DataBlocks Screens Screens FST_REMARKS FST_REMARKS FST_HEADER1 FST_HEADER2 FST_HEADER3 FST_HEADER3 FST_HEADER4 FST_HEADER4 FST_HEADER4	Multi F	Label PE Block BLK_CUSTOMER * Record No * v Type Single *		Scre 1 Sed Partit	een Name en Portion Tab Name tion Name tion Name er Of Rows	CVS_MAIN Header TAB_HEADER SEC_1 PART1	• • • •	☐ Horizontal Fieldset ☐ ReadOnly ☐ Navigation Button ☑ Visible
FST_BASIC FST_PERM_ADDR FST_PASSPORT FST_PASSPORT FST_PASSPORT FST_ADDITIONAL1 FST_POWOF_ATTORNEY FST_BUSN_DESC FST_DADDREDSC FST_INCORPORATION FST_BUSN_DESC FST_DOMICILE FST_DOMICILE FST_DOMICILE FST_STATUS2 FST_STATUS2 FST_CORPDIR1 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR3 FST_CORPDIR4 FST_CORPOIR4 FST_CORPOIR4 FST_CHECKLIST FST_FT_CHECKLIST FST_FT_CHECKLIST FST_FT_CHECKLIST FST_FT_FT_FT_FT_FT_FT_FT_FT_FT_FT_FT_FT_FT	E	Data Block Fields	Ţ		CTYPE	FieldSet Fields	Subpartition Nam	

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

Front-End Files	System Paokages	Hook Paokages	Me	Na Data	Others	
RadXML Screen Xml System JS	Main Package Spec Main Package Body Nolification Triggers Upload Package Body Upload Package Body	Kemel Package Spec Kemel Package Body Cluster Package Spec Cluster Package Body Custom Package Spec Custom Package Body	Menu Details Dalasource Details LOV Delails Block Details Screen Delails Amendable Delails	Label Details Block PK Columns Function Call Forms Gateway Details Notification Details Function Parameters	Xsds Xsd Wilh Annotations Screen Htmi Upload Table Trigger Upload Tables Delini Archive Table Delinili	lion
SLNo		Error Description		Error Code	Status	
	DCIF.xml	Request successfully Process	sed	RD-SAVE-007	Generalød *	
	DCIF_\$YS.js				Generaled +	
ST	DCIF_RAD.xml				Generaled *	
	L					
					Gener	rate Exi

Fig 4.1: Generation of files in Screen Customizer

5 Examples

Example 1:

Requirement: Hide a Field in the screen

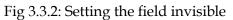
Below screenshots shows how Screen Customizer can be used for this purpose.

Type Individual Corporate Short Name Bank Branch Code Special Customer No Private Customer Customer No P	tomer Maintenand	e				10
Specific Composition Specific Composition Specific Composition Specific Composition Consomer No Personal Consomer No Personal Consomer No Specific Composition Address 0 Address 0 <t< th=""><th>New D Enter Query</th><th></th><th></th><th></th><th></th><th></th></t<>	New D Enter Query					
Specific Composition Specific Composition Specific Composition Specific Composition Consomer No Personal Consomer No Personal Consomer No Specific Composition Address 0 Address 0 <t< th=""><th>Type</th><th>Individual</th><th>Full Name</th><th></th><th>Customer Category *</th><th>Q</th></t<>	Type	Individual	Full Name		Customer Category *	Q
Seciel Customer No P Customer No Corporate Customer No Corporate Series A Permanent Address Address Cute Pincula Bingibile for ARI-AP Tacking Customer Bingibile for ARI-AP Tacking Customer Customer Suffic Cutes Group Cute Suffic Cut			Short Name			
Secaral ConnerNo Corporate Additional Director Austilary Check List MEI Deality Personal Corporate Additional Director Austilary Check List MEI Deality Domicile Address						
Generation Corporate Additional Director Austiliary Check List MFI Details Personal Corporate Additional Director Austiliary Check List MFI Details Same as Permanent Address Status Identifier Unique ID Name Usice Identifier Address Code One Comport Forzen One Comport Nalide Identifier Address 2 One Comport Decessed One Comport Nalide Identifier Address 2 One Comport Eligible for AR.AP Tracking One Comport Nalide Nalide Image ID Name Image ID Name <td< td=""><td>Special Customer No</td><td></td><td></td><td></td><td></td><td></td></td<>	Special Customer No					
Personal Corporate Additional Director Ausiliary Check List MET Details Domicile Address						
Domicile Address Same as Permanent Address Address Code Address 1 Address 2 Address 2 Address 2 Address 3 Address 4 Bigible for AR.AP Trecking Bincode Country Misc Details Swiff Code Gourgo Code Grango Group Charge Group Costomer Classification Exernal Reference Number Bisc bincing Classinger Status Nither Classinger Status Status Status Status Status Status Status Status Status Binote Classinger Status	Customer No	Р				
Seme as Permanent Address	Personal	Corporate	Additional	Director Auxili	ary Check List	MFI Details
Address 1	Domicile Address		Status		Identifier	
Address 1 Image: Control of the con	Same as Permanent Address		Frozen		Unique ID Name	Q
Address 1	Address Code		Deceased		Value	
Address 2	Address 1				Relationship Manage	r
Address 3 Image: Bigble for AR-AP Tracking Image: AR-AP Track	Address 2		Whereabouts Onknown			
Address 4	Address 3		Eligible for AR-AP Tracking			٩
mindad Mailers Required Auto Generated Statement, Mailers Required Country Q Investment Customer Mailers Required Misc Details Joint Customer Joint Customer Required Swiif Code Q Statement Request Statement Day Group Code Q Statement Request Statement Day Group Code Q Relationship Priding Statement Request Group Code Q Withholding Tax Applicable Statement Request Charge Group Q Gift Status Statement Required Tax Group Q Risk Graupy Statement Request Customer Classification Sanction Check Status Not Required External Reference Number G Sanction Check Status Not Required Fx Netting Customer G Sanction Check Status Not Required FX Netting Customer G Sanction Check Status Not Required	Address 4		CRM Customer		RM Name	
Country Q Investment Customer Auto Generated Statement Bin Frequency Solect SWET Code Statement Request Investment Customer Statement Request Statement Day Group Code Q Relationship Pricing Investment Customer Statement Day Group Code Q Relationship Pricing Investment Customer Statement Day Charing Group Q Relationship Pricing Investment Customer Statement Day Charing Group Q Cif Status Statement Day Investment Customer Tax Group Q Cif Status Statement Day Investment Customer Tax Group Q Risk Category Q Statement Day Customer Classification Statement Customer Not Required Investment Customer Location * Q Statement Customer Freich Investment Customer FX Netting Customer Q Statement Customer Investment Customer Investment Customer	Pincode		Mailers Required		Combined Statement	t Plan
Misc Details Investmen Customer Investmen Customer Frequency Select SWIFT Code Joint Customer Statement Request Statement Day Statement Day Group Code Q Statement Request Statement Request Statement Request Statement Customer Group Code Q Relationality Pricing Statement Request Statement Customer Statement Day Group Code Q Withholding Tax Applicable Investment Customer Statement Customer Statement Customer Clearing Group Q Withholding Tax Applicable Investment Customer Statement Customer Statement Customer Tax Group Q Risk Category Q Statement Customer Statement Customer Customer Classification Q Sanction Check Status Not Required Statement Customer Location* Q Sanction Check Status Not Required Statement Customer FX Netling Customer Q Sanction Check Status Not Required	Country	Q	13		Auto Generated Statement	
SwilF Code Joint Customer Statement Request Statement Day Group Code Code Statement Request Statement Request Access Group Code Relationship Pricing Sanction Check Charge Group Code Withholding Tax Applicable Sanction Check Required At Transaction Level Clearing Group Cif Status Cif Status Sanction Check Required At Transaction Level Tax Group Code Sanction Check Required At Transaction Level Sanction Check Required At Transaction Level Customer Classification Code Sanction Check Status Not Required External Reference Number Sanction Check Status Not Required FX Netting Customer Cioe Sanction Check Status Not Required	Miss Details		Investment Customer			Select
Group Code Gatement Request Statement Request Sanction Check Access Group Q Relationship Pricing Sanction Check Required At Transaction Level Charge Group Q Withholding Tax Applicable Sanction Check Required At Transaction Level Clearing Group Q Cli Status Sanction Check Required At Transaction Level Tax Group Q Cli Status Sanction Check Required At Transaction Level Exposure Q Risk Category Q Customer Classification Q Sanction Check Status Not Required External Reference Number Sanction Check Status Not Required Heat FX Netting Customer Q Sanction Check Status Not Required			Joint Customer		Statement Day	
Access Group Classes Group Relationship Pricing Sanction Check Required At Transaction Level Charge Group Classes Group Clis Status Clis Status Tas Group Clis Status Since Exposure Classes Sanction Check Required At Transaction Level Customer Classification Sanction Check Required At Transaction Level Customer Classification Sanction Check Required At Transaction Level FX Netting Customer Sanction Check Status FX Netting Customer Classes			Statement Request		Constitute Chards	
Charge Group Q Withholding Tax Applicable Transaction Level Clearing Group Q CleF Status Intervention Clearing Tax Group Q CleF Status Intervention Clearing Tax Group Q Risk Category Q Customer Classification CleF Status Not Required External Reference Number Fetch Location Q Fetch			Relationship Pricing			
Charge Group Q Clearing Group Q Tax Group Q Tax Group Q Since Since Exposure Q Customer Classification Q External Reference Number Fetch FX Netting Customer Q			Withholding Tax Applicable		Transaction Level	
Tax Group Q Since Exposure Q Risk Category Q Customer Classification Q Sanction Check Status Not Required External Reference Number Fetch Fetch Location* Q Sanction Check Status Not Required						
Exposure Q Risk Category Q Customer Classification Q Sanction Check Status Not Required External Reference Number Fetch Fetch Costom r Q Fetch						
Customer Classification O External Reference Number Fetch Location * O FX Netting Customer O						
External Reference Number Etch Location * Q FX Netting Customer Q						
Location Q FX Netting Customer Q		Q	Sanction Check Status			
FX Netting Customer Q				Petch		
Media " Q	-					
55N		Q				

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

Screen C	Customization			- T -							_
							l	1	× =	V	9
	Action Load -		Function Type Pa	irent	- Function Cat	egory Ma	iintenance 👻				
	Function Id STDCIF		Parent Function		Header Tem	plate No	ne 🔻				
	Save XML Path STDCIF_RAD.	BROWS	Parent Xml		Footer Tem	plate Ma	int Audit 🗖				
		DI							_		
Search		BIOC	k Field Properties								a 🧳
	ADDRLN3	^	Field Name * WHRUNKN		XSD Tag WHRUNKN	1			Require	d	
	ADDRLN4			*					/isible		
	COUNTRY				XSD Annotation		L	A	_		
	SNAME		DataSource STTMS_CUSTOMER		Field Size *				Read O	nly	
	NLTY		Column Name * WHEREABOUTS_UNKN	ow	Maximum Length 1]			Calende	er Text	
	🗀 LBRN		Data Type * Char 👻		Minimum Value	1		E F	Popup E	Edit Re	quired
	CCATEG	=	Display Type CheckBox -		Maximum Value	i		пι	Jpperca	ase Or	ily
	TULLNAME		Item Type Database Item 👻		Maximum Decimals	1			.OV Val		
	CIFCREATIONDT			~		1			Require		
	ISELCMCUST		Related Block		TextArea Rows			E li	nput by	LOV	nly
					TextArea Columns				lot Rec	uired	n Xsd
	AR_AP_TRACKING		Related Field		Default Value N	* =			Report P		
			LOV Name		Preview Value	1			oponti	aram	CICI
		Off	Line LOV Name		MaskId	*=					
	FROZEN		Fieldset Name FST_STATUS		Maskiu						
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	CRRATE								+	-	
	🚞 MEDIA		Attribute Name		Attribute Value	Active	Positi	0.0		~	
	C SSN		Attribute Name		Attribute value	Acuve	POSID	011			
	SWIFTCD		FF 🗾	N		Yes 👻	1				
	LOC		N	Y		Yes 🔻	2				
	MAILRSREQD		N	1		res •	2				
	GRPCD										
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	CIFSTAT										
	CHGGRP										
	CUSTCLGGRP										
	TAXGROUP										
	CLSPARTICIPANT									-	
	FXNETTCUST										
	XREF										

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



stomer Maintenand	e				
New 🟳 Enter Query				HI.ZARANANA	
Туре	Individual	Full Name		Customer Category *	Q
	O Corporate	Short Name		Private Customer	
	() Bank	Branch Code			
Special Customer No Generation					
Customer No	P				
Personal	Corporate	Additional	Director Auxiliary	Check List	MFI Details
Domicile Address		Status		Identifier	
Same as Permanent Address		Frozen		Unique ID Name	Q
Address Code	Q 🗖	Deceased		Value	
Address 1				Relationship Manage	r
Address 2				RMID	Q
Address 3		Eligible for AR-AP Tracking		RM Name	~
Address 4		CRM Customer			
Pincode		Mailers Required		Combined Statement	Plan
Country	Q	Investment Customer		Auto Generated Statement Plan	
Misc Details				Frequency	Select
SWIFT Code		Joint Customer		Statement Day	
Group Code	Q	Statement Request		Sanction Check	
Access Group	Q	Relationship Pricing		Sanction Check Required At	
Charge Group	Q	Withholding Tax Applicable		Transaction Level	
Clearing Group	Q	CIF Status			
Tax Group	Q	Since			
Exposure	Q	Risk Category	Q		
Customer Classification	Q	Sanction Check Status	Not Required		
External Reference Number			Fetch		
Location *	Q				
FX Netting Customer	Q				
Media *	Q				
SSN					

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

stomer Maintena	nce										
New D Enter Query									出来建筑和高		
Тур	e Individual 				Full Na	ame			Customer Category		Q
	O Corporate				Short Na	ame			Private Customer		
	O Bank				Branch C	ode					
Special Customer N											
Generatio											
Customer N	0	Р									
Personal	Corporate		Additi	onal		Dire	ctor	Auxiliary	Check List	N	1FI Details
Domicile Address			E.	Status					Identifier		
Same as Permanent Addres	is D				Fro	zen			Unique ID Name		Q
Address Coo		QP			Decea				Value		
Address		~~									
Address				When	eabouts Unkno	own			Relationship Manage	er	
Address				Eligible fo	or AR-AP Track	king			RM ID		Q
Address					CRM Custo	mar			RM Name		
Pincoo									Combined Statemen	t Plan	
Counti		Q			Mailers Requi	ired			Auto Generated Statement		
	y	Q		Inve	stment Custo	mer			Plan Frequency	Select	
Misc Details					Joint Custo	mer			Statement Day	Select	
SWIFT Cod	e			s	tatement Requ	Jest			Statement Day		
Group Cod	e	Q							Sanction Check		
Access Grou	p	Q			lationship Pric				Sanction Check Required At Transaction Level		
Charge Grou	p	Q		Withhold	ing Tax Applica	able					
Clearing Grou	p	Q			CIF Sta	atus					
Tax Grou	p	Q			SI	ince					
Exposu	e	Q			Risk Categ	tory		Q			
Customer Classificatio	n	Q		Sand	tion Check Sta	atus	Not Required				
External Reference Numb	ır.						Fetch				
Location	•	Q									
FX Netting Custom	er	Q									
Media	•	Q									
SS	N										
Group MIS Joint	Standing Instructions	Linked Entities	Text	Fields	Image	Limits	Statement Request	Domestic	Professional Cards Lini	>	Audit

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.

ustomer Maintena	nce		11
New 🏳 Enter Query			
	🔿 Bank	Branch Code	
Special Customer No Generation		bianchicode	
Customer No	Р		
Personal Identifier	Corporate Additional	I Director Check List	MFI Details Unique Identifier
Unique ID Name	Q		
Unique ID Name Value	Q		
	C. Standing Instructions Linked Entities	Fields Image Limits CLS Restrictions MT92	20 Dome > Audit Ex

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



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