Development of Call Form

Oracle FLEXCUBE Universal Banking

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1. Preface

This document describes the features of a Call Form screen in FLEXCUBE and the process of designing a Call form 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 Screen Development	*Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development*
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

Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development
Development Workbench - Screen Development II
Development of Online Forms

2. Introduction

2.1 How to use this Guide

The information in this document includes:

- Chapter 2 , “Introduction”
- Chapter 3 , “Overview of Call Form"
- Chapter 4 , “Screen Development”
- Chapter 5 , "Generated Units”
- Chapter 5 , "Extensible Development”

3. Overview of Call Form

Call Forms are function Id’s (screens) which can be used for processing of a feature which is common across multiple function Ids.

Call Forms can be attached to the main function Id for processing the common functionality. Call form screens cannot be launched independently.

Example: ***Tax Processing for a Contract***

Tax Processing depends on common tax rules attached for the product/contract. Same processing can be used for various contract screens like Funds Transfer Input Screen, Letters Of Credit etc.

Thus a common function id can be developed which can be attached to all the contract screens requiring tax processing

On launching the call form screen from the main screen, the values will be picked up based on the data input in main screen. User will have the option to change the data in call form screen if desires so.

There are two types of Call forms

1) Maintenance Call Forms
2) Transaction Call Forms

Maintenance Call forms can be attached to only maintenance function id’s while transaction call forms can be attached to transaction screens only

4. Screen Development

Design and development of a Call Form function id is similar to any other function Ids. This section briefs the steps in designing a Call Form screen.

For detailed explanation, refer the document: Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development

4.1 Header Information

Provide the header information as shown in the figure.

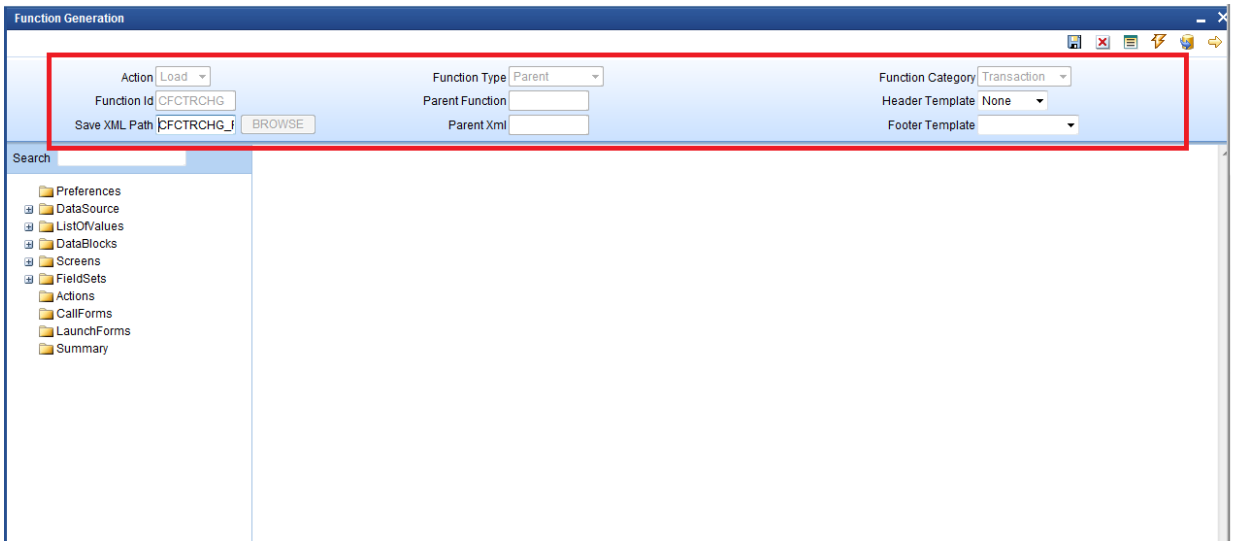


Fig 4.1 Call Form header Information

Note the following while providing header information.

i) Name of the Call form :

Call Form name has to have the third character as 'C'. This is how system differentiates a call form from other screens. Ideally, the length of the name should be 8 characters.

Example: CFCTRCHG, ISCTRSTL etc are valid call form names

ii) Call Form Category:
It has to be either Maintenance or Transaction depending on the functionality and the screens from which it will be invoked

iii) Footer Template:
Footer template can be provided as required. Note for Transaction screens, footer template has to be selected as NONE unless it is a process screen

iv) Function Type :
Parent and child functionality is supported for call forms

4.2 Preferences

Provide the menu details in the Preferences screen

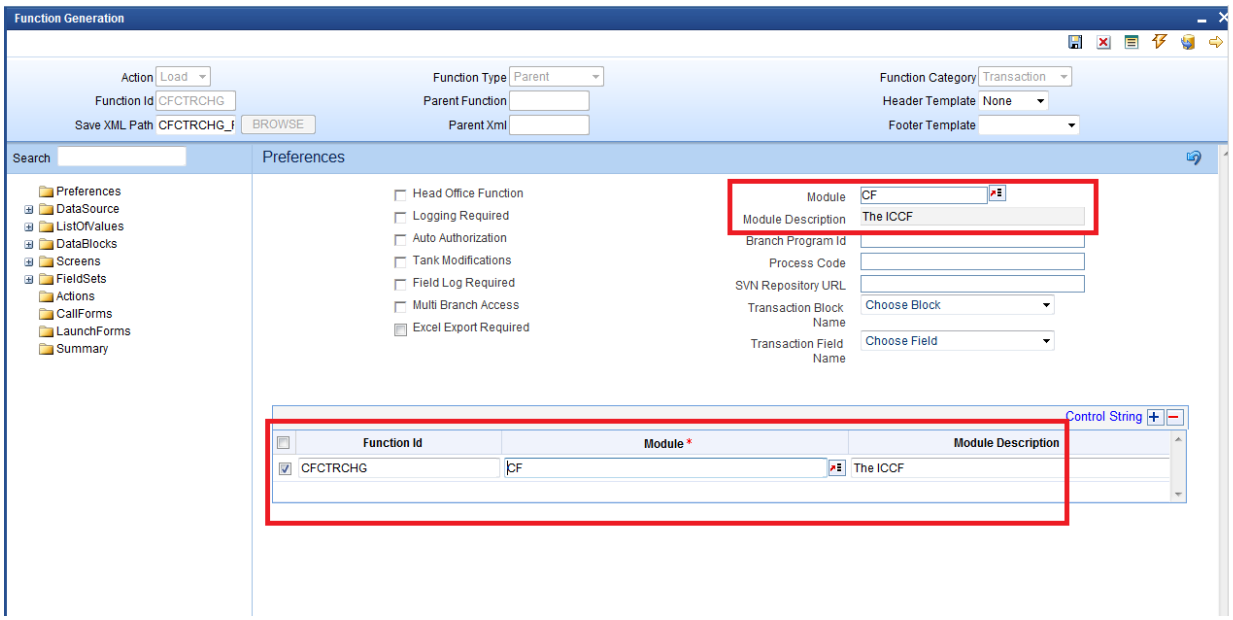


Fig 4.2 Call Form Preferences

Note the following while providing Preferences for Call Forms.

i) Module name :
Module name is a mandatory field and has to be provided. It is recommended that the first two letters of the function id is kept as same as the module name. Naming of the generated package will be derived from the module code maintained

ii) Of the menu details inc generated, only script for SMTB_MENU and SMTB_FCC_FCJ_MAPPING is required for Call Forms

iii) Browser menu options :
Call Forms cannot be launched independently .Hence browser menu labels need not be maintained. **Script for smtb_function_description is not required for call forms**

4.3 Data Sources

Identify the tables/views for the call form. Define data sources and add data source fields as required

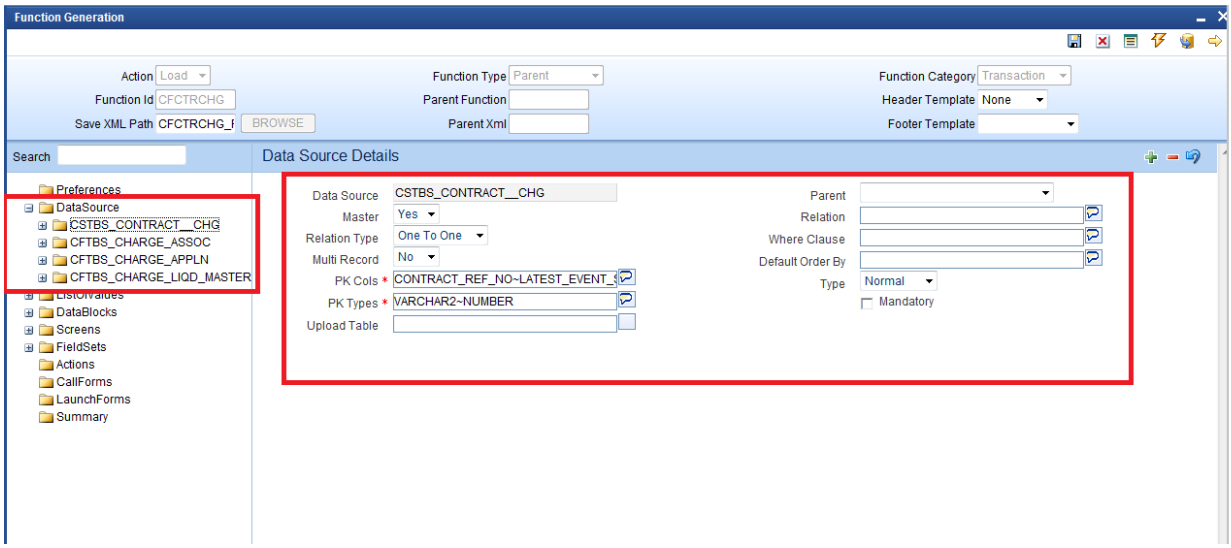


Fig 4.3 Adding data sources and maintaining properties

Note the following while creating data sources

i) Master Data Source has to be a single entry data source.

ii) Logical Relationships has to be maintained for all data sources except the parent

iii) Provide PK Cols and PK types for all data sources.
If data source is a multi record block, then make sure it has at least one more pk than its parent which helps to uniquely identify each record of multi record block

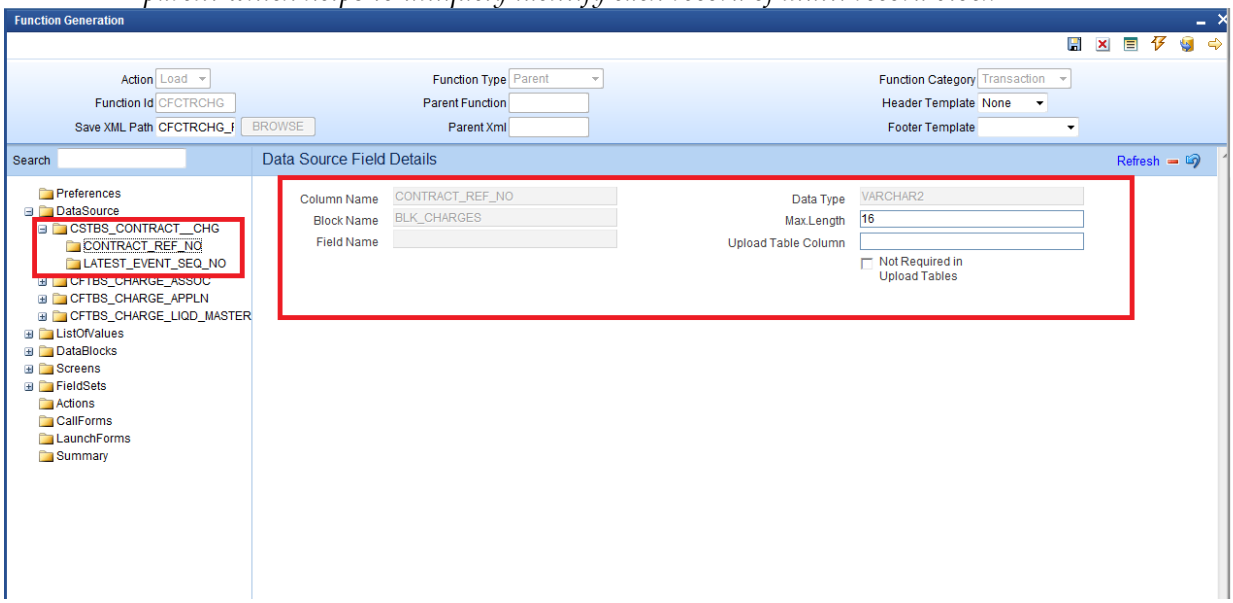


Fig 4.4 Adding data sources fields and its properties

Max length of the data source field can be modified as per requirement

4.4 Data Blocks

Determine the block structure for the function id .Define Data Blocks as per the design

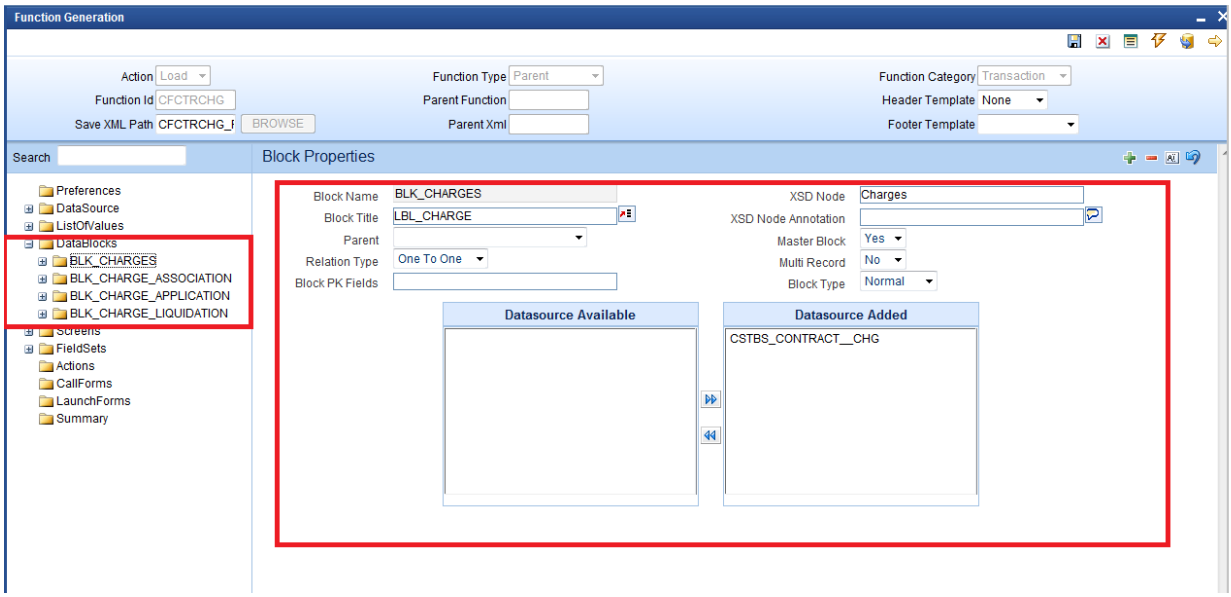


Fig 4.5 Defining Data Blocks and maintaining its properties

Note the following while creating data blocks

i) Master Data Source has to be a single entry data source.

ii) Logical Relationships with the parent has to be maintained for all data sources.

iii) Provide PK Cols and PK types for all data sources.
If data source is a multi record block, then make sure it has at least one more pk than its parent which helps to uniquely identify each record of multi record block

iv) Provide Xsd node name if the block is normal and is required in gateway request

Add block fields to the data block as required.

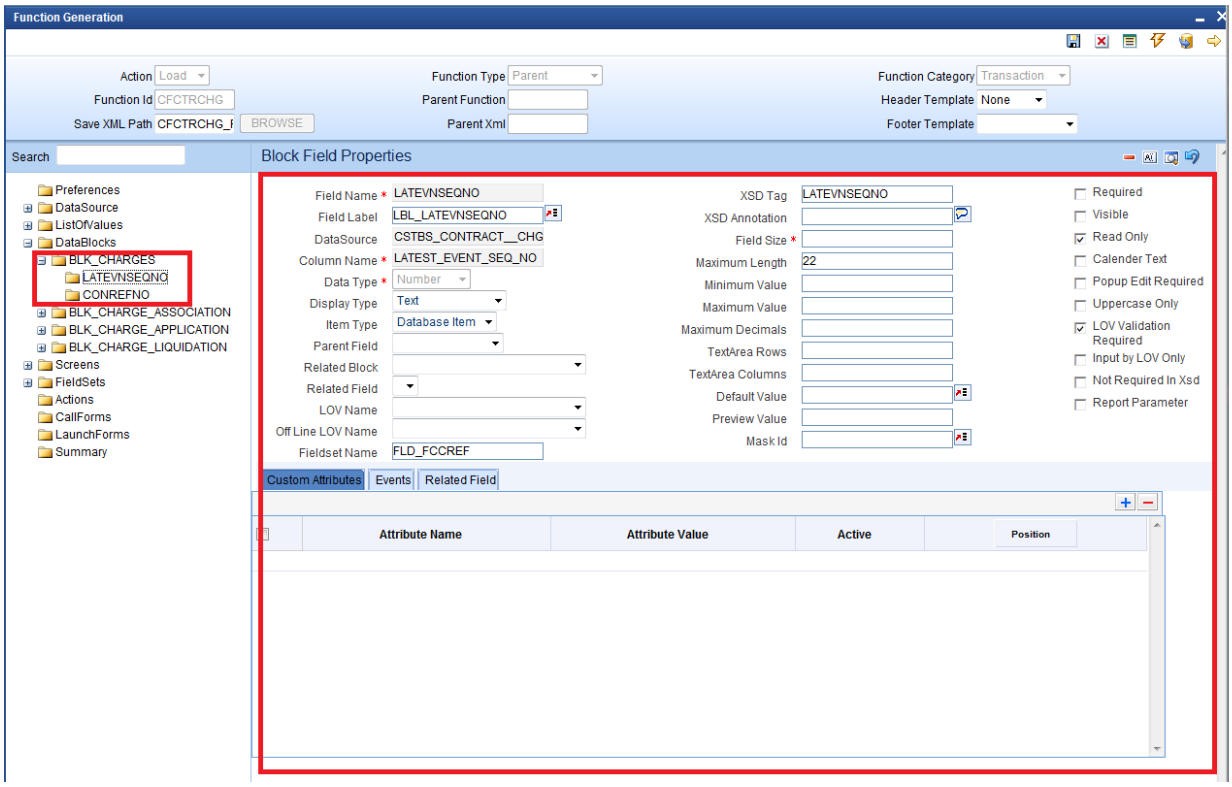


Fig 4.6 Attaching Block Fields and maintaining its properties

Note the following while attaching block fields to data blocks

i) In case the field is not required in XSD, check not Required XSD

ii) Ensure that Related Block and Field are given for Amount Fields

iii) Minimize the use of query data sources by using DESC fields wherever possible.

Note: Query data sources is rarely required for a Call Form screen; as launch form can be used for query only screens

4.5 Screens

Design the screen layout based on the requirement

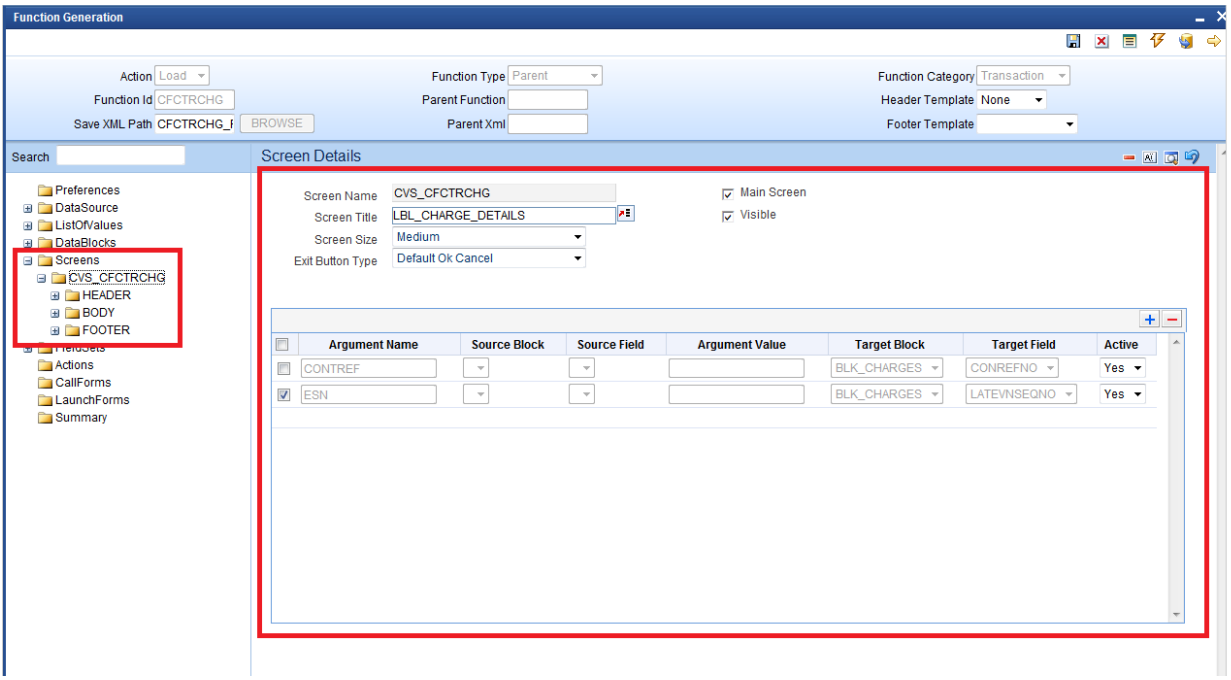


Fig 4.7 Designing Screens and providing Screen Properties

Note the following while creating screens

i) One Screen should be identified as the main screen; if multiple screens present

ii) In the function id ,where the call form is called :
For the button (which launches call form) events, the main screen of the call form has to be mentioned

iii) **Screen Arguments :**
Screen Arguments has to be provided for the main screen. Any field which has to be populated based on the data from the calling Function id can be provided as the target block and target field.
Normally values for the pk fields of the master data source can be retrieved from the screen arguments .Relationship between the calling function id and the call form will also be based on the pk columns of master data source.

Add Tabs, sections and partitions as per the screen design

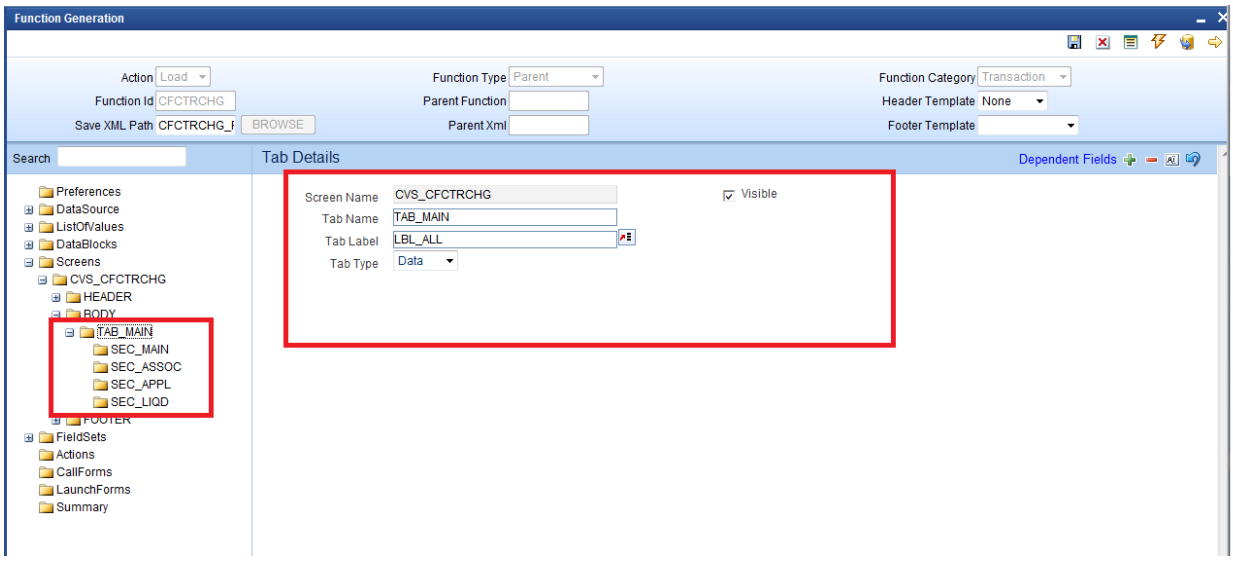


Fig 4.8 Creating Tabs and maintaining Properties

Note the following when creating tabs and sections for the screen

i) If the screen does not have multiple tabs, then only the TAB_MAIN needs to be used. TAB_HEADER should not contain any sections in this scenario

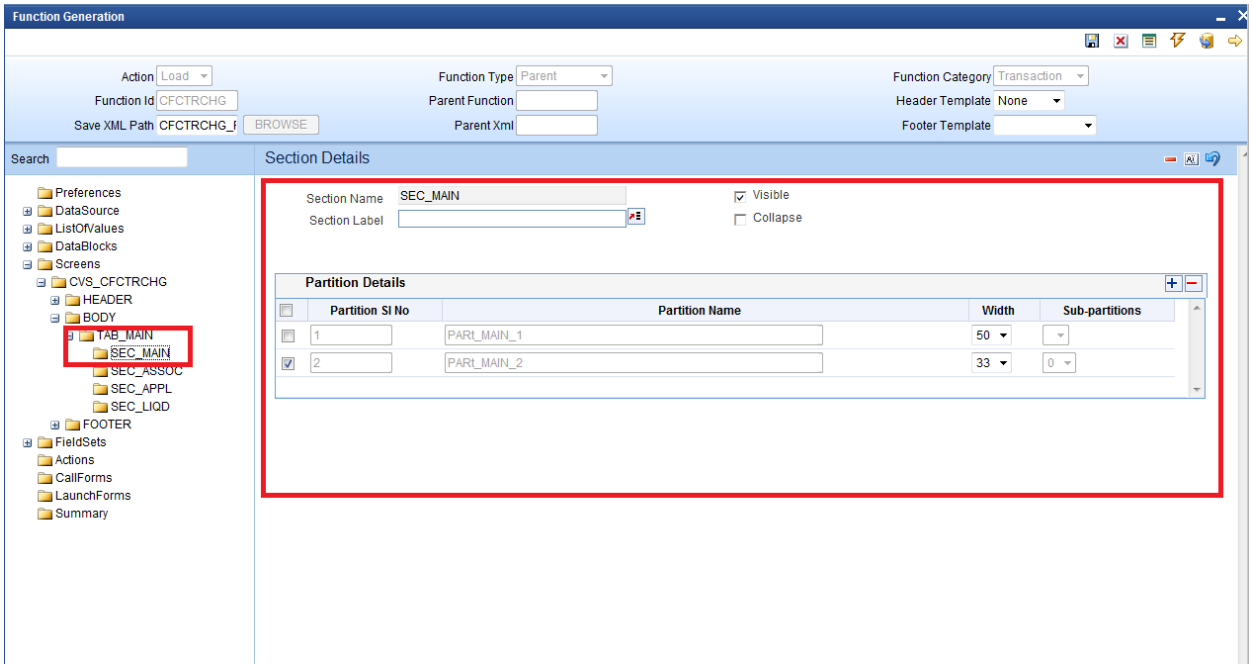


Fig 4.8 Section Properties

Multiple Screens can be designed if required.

4.6 Field Sets

Create Field sets and attach the fields to the field sets as required

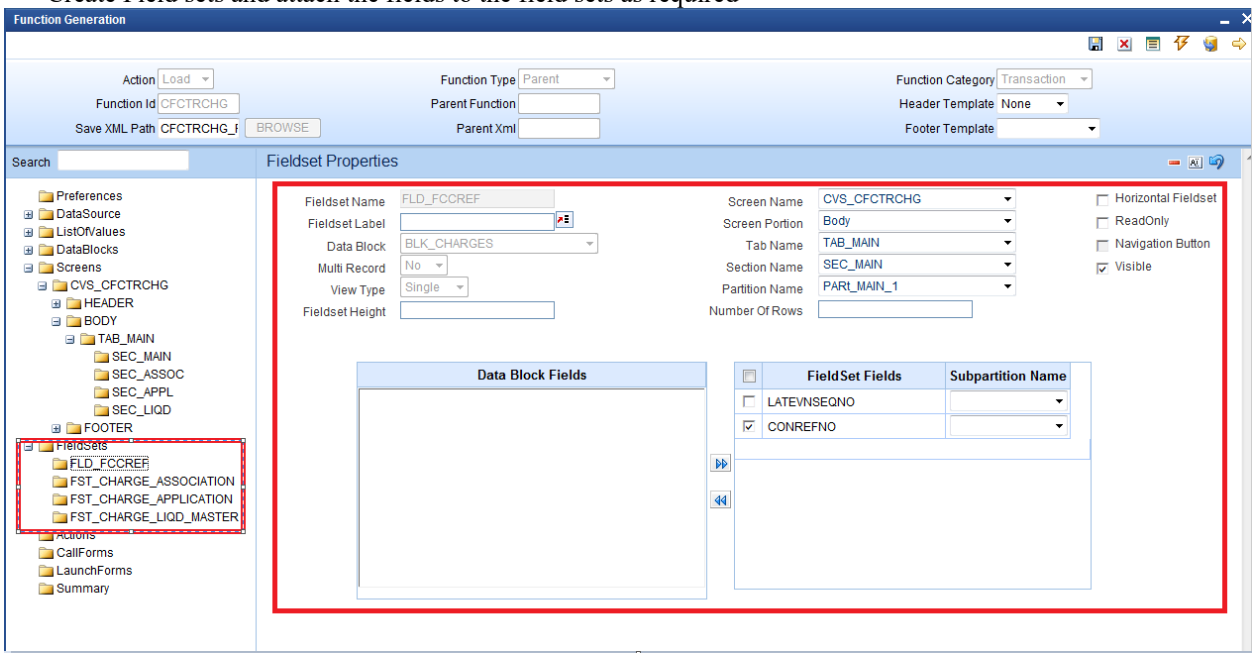


Fig 4.9 Field Set Properties

Not the following when attaching field to a field set

i) **If a field value is passed as screen argument ,but is not required to be shown in the screen,**
The field has to be made invisible and attached to a field set. If it is not attached to any fields set, the screen html won't contain the field and may result in script error while loading

4.7 Actions

Mention the web service and amendable information in Actions Screen

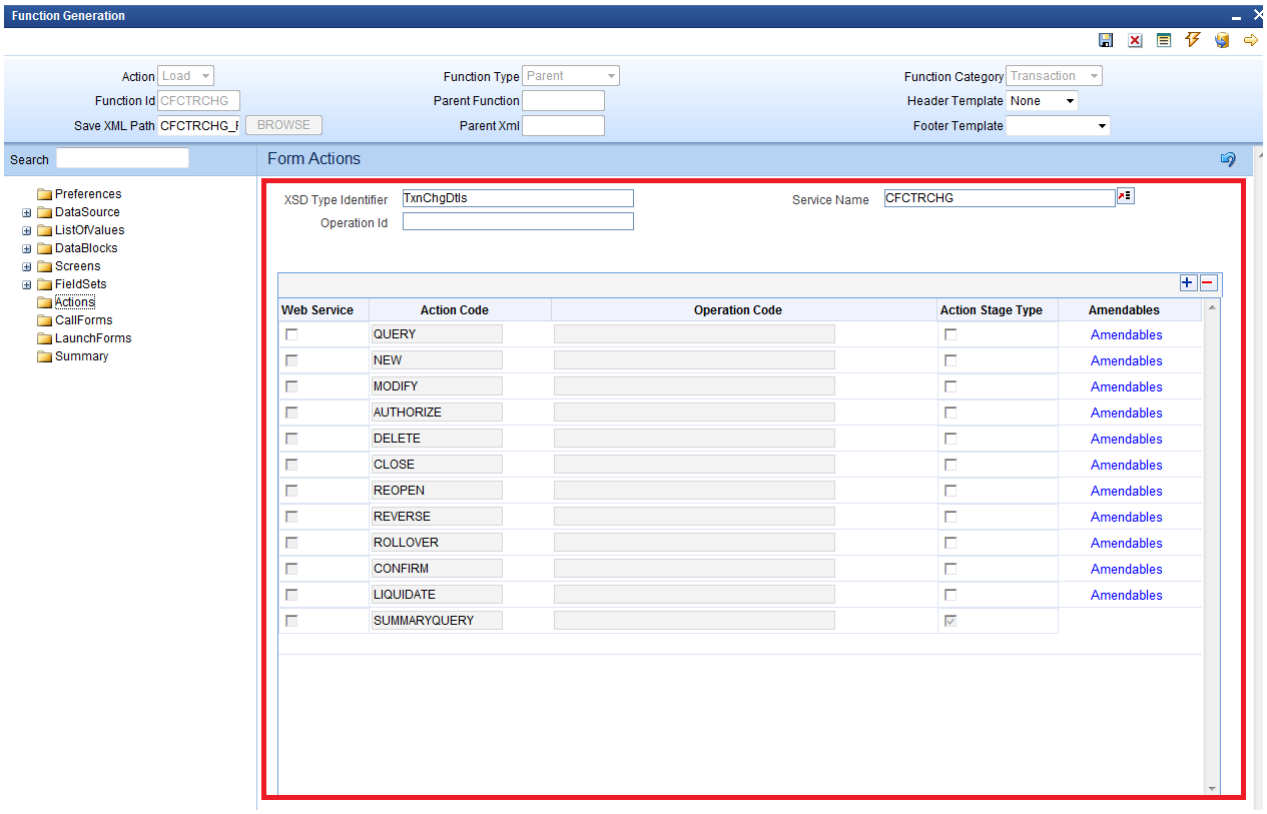


Fig 4.10 Actions Screen

Note the following while maintaining web services and amendable information

i) Call forms will generate only Type XSD.
Operation specific message xsd's will not be generated. Call form Type will be part of the main function Id xsd; hence separate message xsd is not required for call form 'Subsys' will be added to the name of call form type xsd.
Example: for the example given in the figure, name of the xsd generated will be SubSys-TxnChgDtls-Types.xsd

ii) Operation Id and Operation Code need not be maintained for the above mentioned reason

iii) Amendable information has to be maintained similar to any other function id's.

4.8 Launch Forms

Launch Forms can be attached to a Call form screen. Though it is technically supported, practical scenarios where launch form is part of a call form is very rare.

Process to attach launch forms is similar to any other function Id's.

4.9 Call Forms

Call forms can themselves be attached to a call form. This scenario also is practically very rarely used.

Processing logic (sub system pickup) for the attached cal forms has to be called from the main call form

4.10 Summary

Summary screens are not required for Call Form screens. Since a Call Form screen cannot be launched independently in FLEXCUBE, it doesn't require a summary screen

4.11 Preview

The figure shows the preview of the call form screen developed

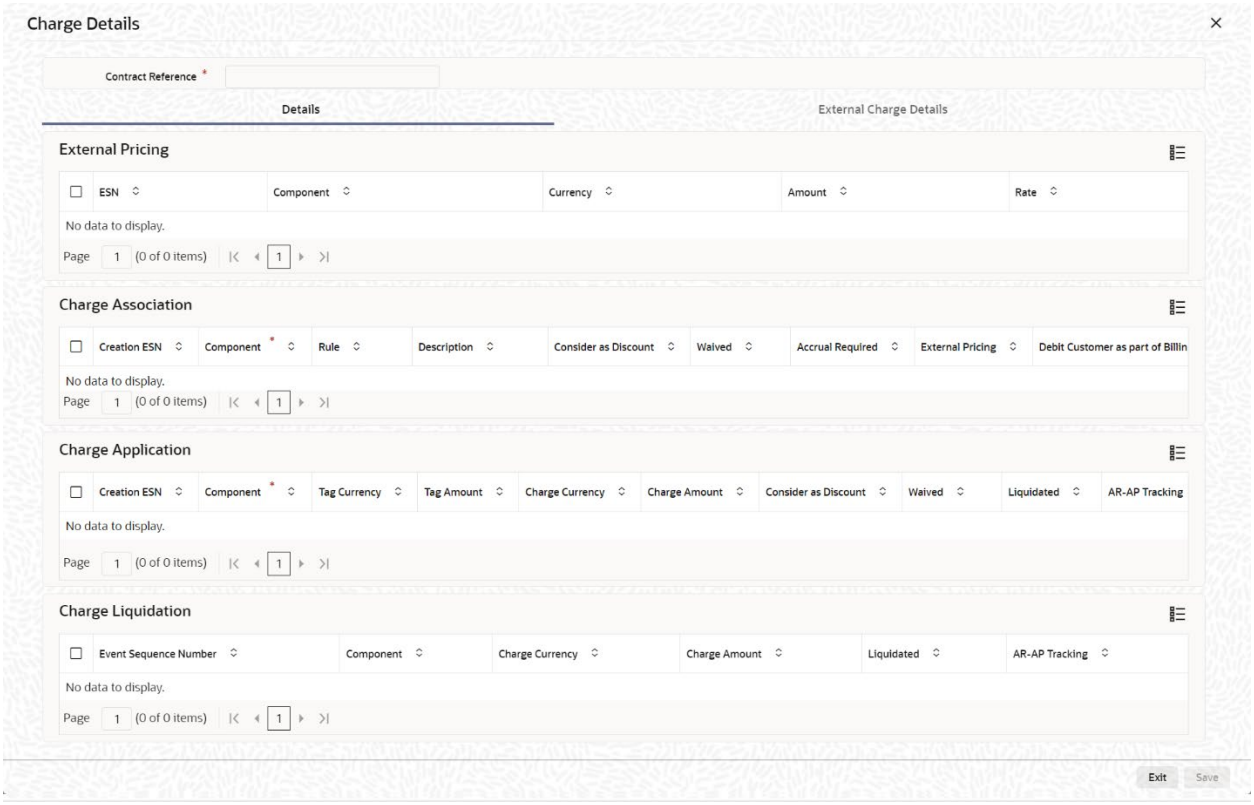


Fig 4.10 Call Form Screen Preview

Generate the units for call form and deploy them in the FLEXCUBE server for unit testing

5. Attaching Call Form to Main Function Id

Call Forms cannot be launched independently. It has to be called from a main function id. Refer *Call Forms* section in Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development for detailed explanation

Note that scripts for CSTB_CALL_FORM_NODES and SMTB_MENU tables generated by Call Form screen has to be deployed in FLEXCUBE schema before attaching Call form to the main function Id.

6. Generated Units

The following units will be generated for a Call Form screen.
Refer document on generated units on detailed explanation on the same

6.1 Front End Units

6.1.1 Language xml

This file is an XML markup of presentation details, for the designed Call Form specific to a language.

6.1.2 SYS JavaScript File

This JavaScript file mainly contains a list of declared variables required for the functioning of the screen

6.1.3 Release Type Specific JavaScript File

This file won't be generated by the Tool. It has to be manually written by the developer if he has to write any code specific in that release

6.2 Data Base Units

6.2.1 Static Scripts

The following static scripts generated are required for the proper functioning of a Call Form screen. Refer document on generated units for detailed explanation

i) **Menu Details**
   Scripts for SMTB_MENU and SMTB_FCC_FCJ_MAPPING are required for the functioning of Call Form screen
ii) **Call Form details**
   Script for CSTB_CALL_FORM_NODES is required for attaching the call forms to the main function id. This has to be compiled in the schema before attaching the Call form to the main function Id
iii) **Lov Details**
iv) **Amendable Details**
v) **Label details**
vi) **Screen Details**
vii) **Block details**
viii) **Data Source Details**

6.2.2 System Packages

Main package would be generated by the Tool and should not be modified by the developer.

There is small change in the structure of the package depending on the type of the call form (Maintenance or Transaction).
Unlike normal maintenance function ids, call form packages does not have any call to the business logic within itself (similar to transaction function id). If developer wishes to uses any functions within the main package , call has to be made from the release specific package.

Main package contains functions for :

- Converting Ts to PL/SQL Composite Type

- Calling fn_main.
- Mandatory checks (fn_check_mandatory).
- Default and validation(fn_default_and_validate)
- Querying(fn_query)
- Converting the Modified Composite Type again to TS

Except the functions for type conversions, others functions calls the respective hook functions in hook packages of the call forms. Thus no processing logic within the main package is used

It is to be noted that each of these functions are called from the main package of the main function id (where this call form is used) during respective stages.

But the package contains many other system generated functions for operations like

- Mandatory checks(fn_sys_check_mandatory)
- Default and validation(fn_sys_default_and_validate)
- Uploading to DB(fn_sys_upload_db)
- Query operation (fn_sys_query) etc

These functions are not called anywhere in the package. These functions if required can be called by the developer from the release specific package. Otherwise developer can write his own logic for the same in the Hook Packages

6.2.3 Hook Packages

Release specific packages will be generated based on the release type (KERNEL.CLUSTER or CUSTOM). The structure of the package depends on the type of call form (Maintenance or Transaction). Developer can add his code in the release specific hook package.

6.3 Other Units

6.3.1 Xsd

Only Type XSD will be generated for a Call Form function Id. Subscript *Subys* will be added before XSD Type identifier in the name of the generated xsd .

This type xsd will be used in the type xsd of any function which uses the particular call form

7. Extensible Development

Developer can add his code in hook packages and release specific JavaScript file.

7.1 Extensibility in JavaScript Coding

For release specific JavaScript coding, code has to be written in release specific JavaScript file.

It follows the naming convention as : (Function Id)_(Release Type).js

Example: Code in CFCTRCHG_CLUSTER.js is exclusive to cluster release

This JavaScript file allows developer to add functional code and is specific to release. The functions in this file are generally triggered by screen events. A developer working in cluster release would add functions based on two categories:

- Functions triggered by screen loading events
  Example: fnPreLoad_CLUSTER(), fnPostLoad_CLUSTER()
- Functions triggered by screen action events
  Example: fnPreNew_ CLUSTER (), fnPostNew_ CLUSTER ()

7.2 Extensibility in Backend Coding

Release specific code has to be written in the Hook Packages generated.
Structure of a Maintenance and Transaction Call Form hook packages are almost the same
Note that though structure is almost the same ,arguments differ in transaction and maintenance call forms .Hence Transaction Call Form can be attached only with Transaction screen and similarly for Maintenance screens
Different functions available in the Hook Package of a Call Form are:

1) **Skip Handler : Pr_Skip_Handler**
   This can be used to skip the logic written in another release**.**
   Example: logic written in KERNEL release can be skipped in CLUSTER release
2) **Fn Main**
   This is called form the fn_main in main package.
3) **Fn_pre_query**
4) **Fn_post_query**
   Any specific logic while querying can be written in these functions. It is called from fn_query of the main package

5) **Fn_pre_upload_db**
6) **Fn_post_upload_db**
   Any logic while uploading data to tables can be written here **.**

7) **Fn_pre_default_and_validate**
8) **Fn_post_default_and_validate**
   Any release specific logic for defaulting and validation can be written here . It is called from the fn_default_and_validate in the main package

9) **Fn_pre_check_mandatory**
10) **Fn_post_check_mandatory**
    Any mandatory checks can be validated here

11) **Fn_pre_process**
12) **Fn_post_process**
    These hook functions are specific to transaction call form screens. These are called from fn_process of the main package which in turn is called from fn_process of the calling function id

Refer maintenance and Transaction Screen development document for further explanation



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