# Development of Dashboard Forms
Oracle FLEXCUBE Universal Banking
Release 14.8.3.0.0
Part No. - G61377-01
October 2026



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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 | *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*

# 2 Introduction

This document provides information on:


- Chapter 2 , “Introduction”
- Chapter 3 , “Creating Dashboard Form"
- Chapter 4 , “Generation of Units"
- Chapter 5 , “User Maintenance"


# 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*

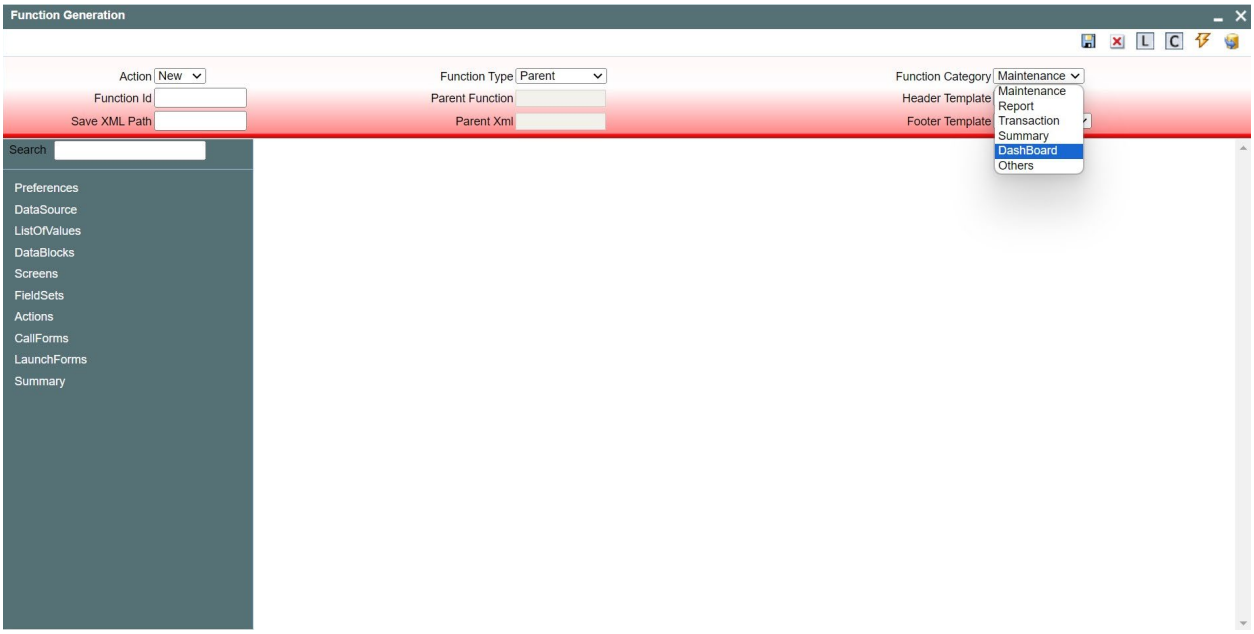



Fig 5.2: Selecting Function Category

## 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.

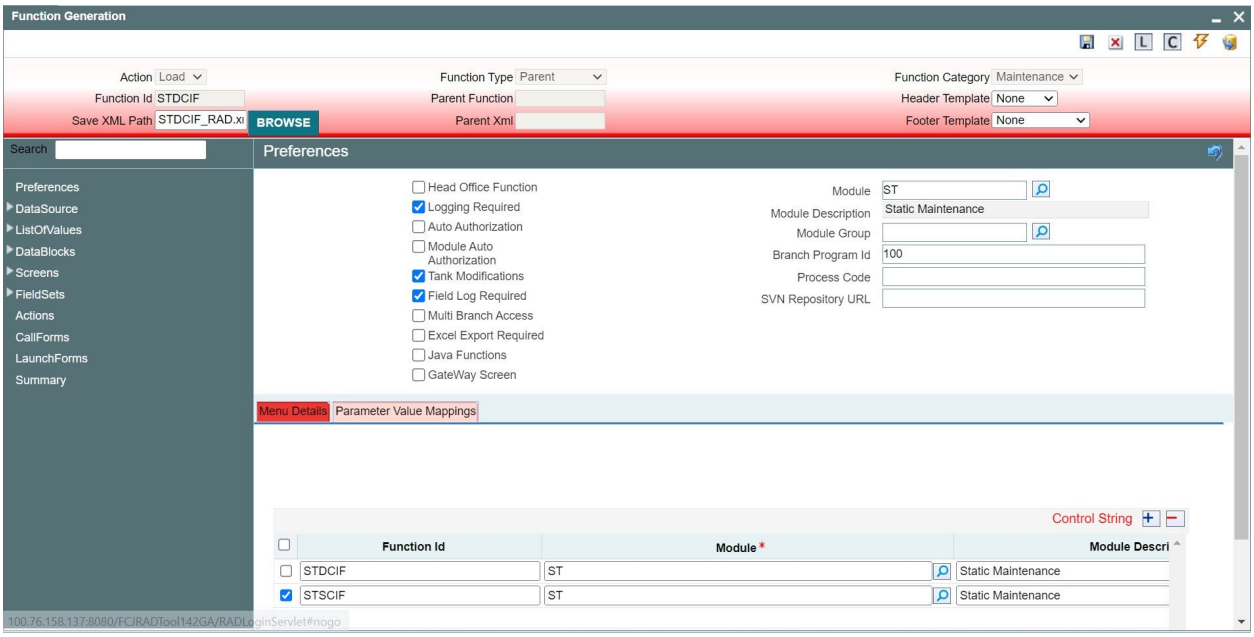


Fig 5.1.1: Selecting the Preferences

## 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)

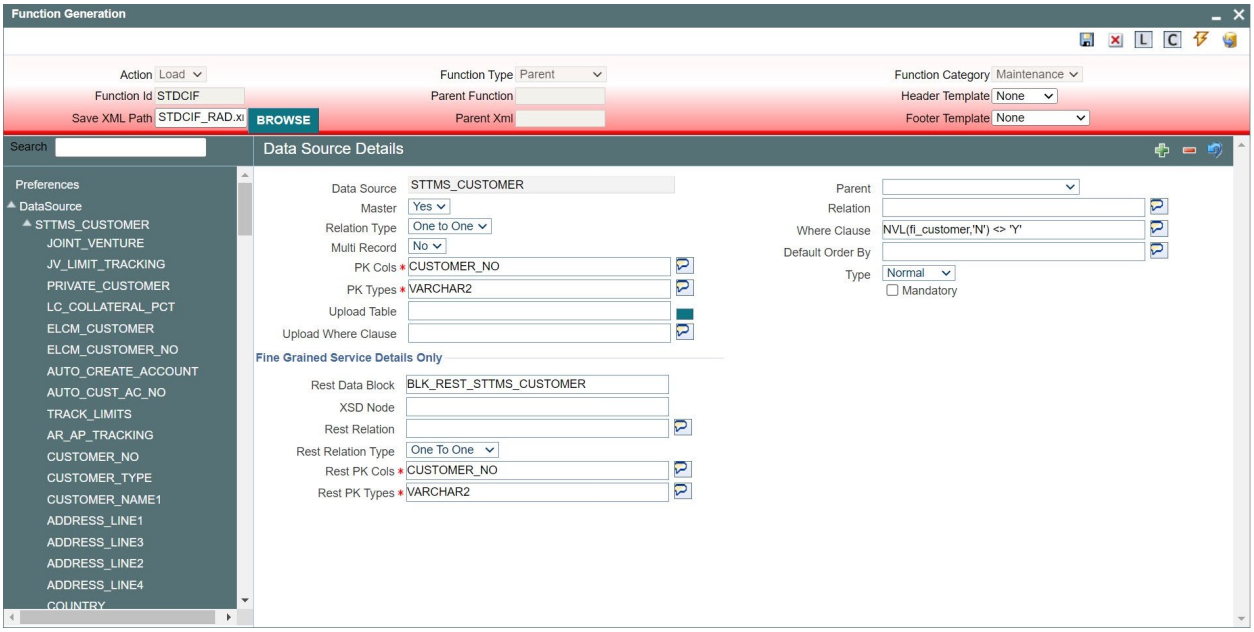



Fig 5.2.1: Data sources

## 3.3 Data Blocks

Data block must be created and attach the data source to the block. Currently, dashboard screens can have only one data block

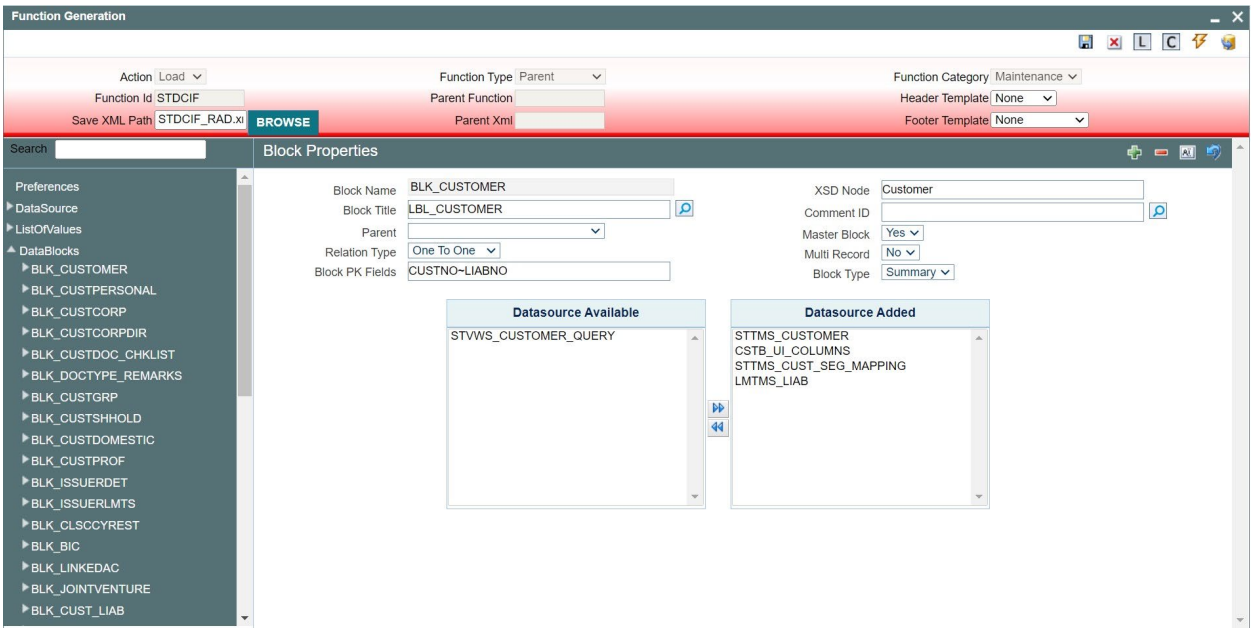



Fig 5.3.1: Data blocks

### 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.

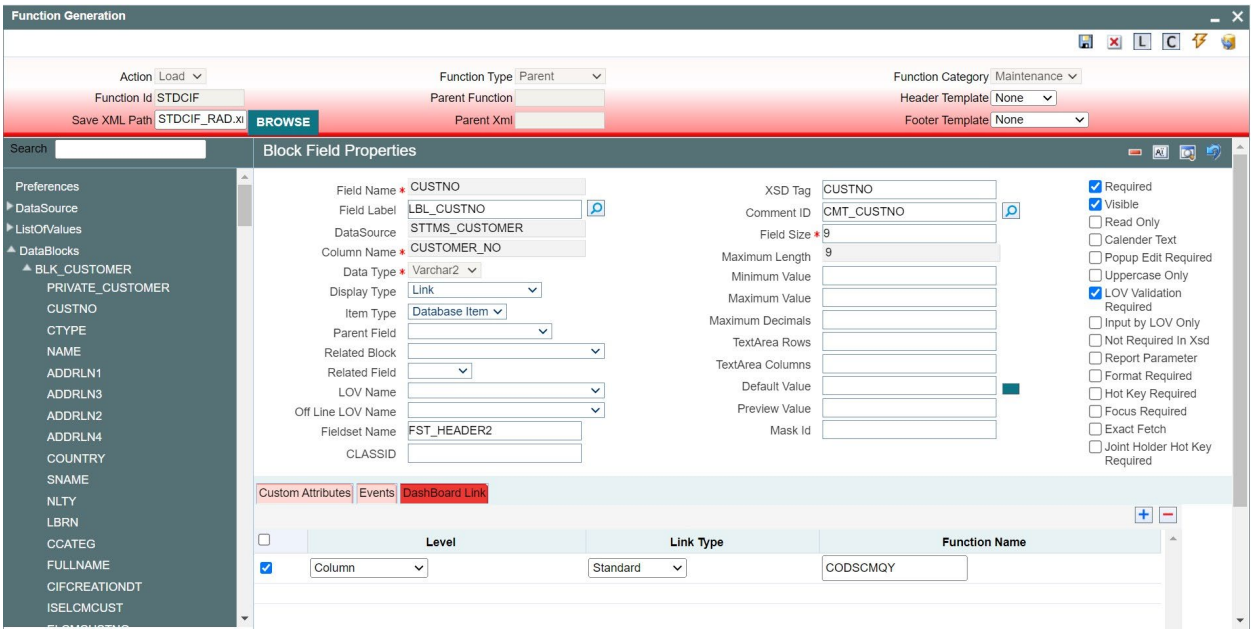



Fig 5.3.1.1: Block fields

**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.

Below screenshot shows the summary screen along with the preview of the screen

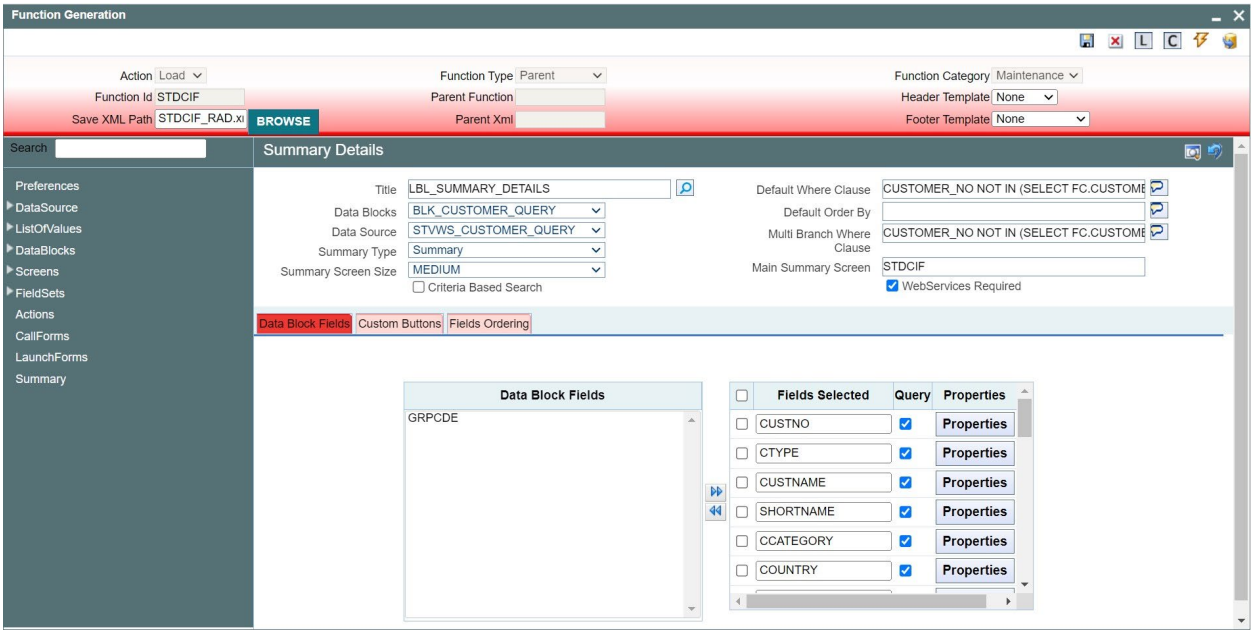



Fig 4.4.1: Summary Screen

# 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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**Version 14.8.3.0.0**

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