

Oracle® Banking Corporate Lending

Development of Dashboard Forms



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Preface

This topic contains the following sub-topics:

- [Purpose](#)
- [Acronyms and Abbreviations](#)
- [Audience](#)
- [Critical Patches](#)
- [Conventions](#)
- [Diversity and Inclusion](#)
- [Documentation Accessibility](#)
- [Related Resources](#)
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Purpose

This document describes Dashboard Forms available in Oracle FLEXCUBE Universal Banking and guides the developers in designing a Dashboard screen using Oracle FLEXCUBE Development Workbench for Universal Banking.

Acronyms and Abbreviations

Table 1 Acronyms and Abbreviations

Acronyms	Abbreviations
FCUBS	Oracle FLEXCUBE Universal Banking Solution
OBCL	Oracle Banking Corporate Lending
ODT	Oracle Development Tool

Audience

This document is intended for Oracle FLEXCUBE Universal Banking Application developers/users that use Development Workbench to develop various Oracle FLEXCUBE Universal Banking components. To use this manual, the user needs a conceptual and working knowledge of the below:

Table 2 Proficiency Details

Proficiency	Resources
Oracle FLEXCUBE Universal Banking Technical Architecture	Training programs from Oracle Financial Software Services.
Working knowledge of Web based applications	Self Acquired
Working knowledge of Oracle Database	Oracle Documentations

Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at [Critical Patches, Security Alerts and Bulletins](#). All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

Conventions

The following text conventions are used in this document:

Table 3 Conventions

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <https://www.oracle.com/corporate/accessibility/>.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Related Resources

For further information, refer to the documents:

- Development Workbench - Screen Development
- Development Workbench - Screen Development II

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

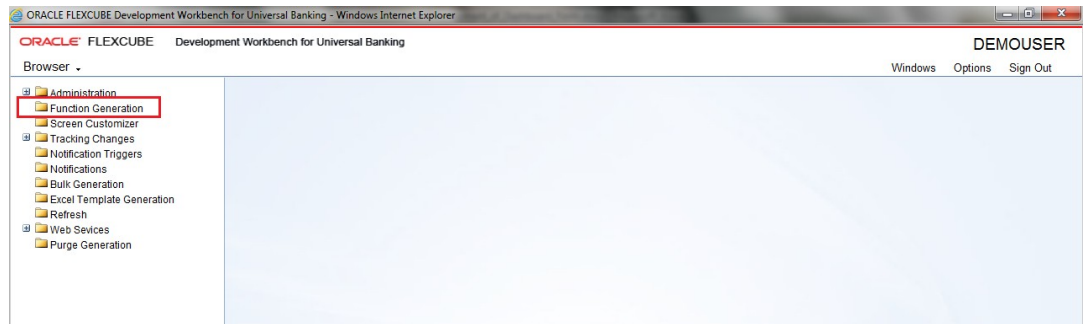
1

Create Dashboard Form

This topic describes the systematic instruction to Create Dashboard Form.

1. Log in to the Development Workbench and click the **Function Generation** node.
The **Development Workbench for Universal banking** screen is displayed.

Figure 1-1 Development Workbench for Universal Banking

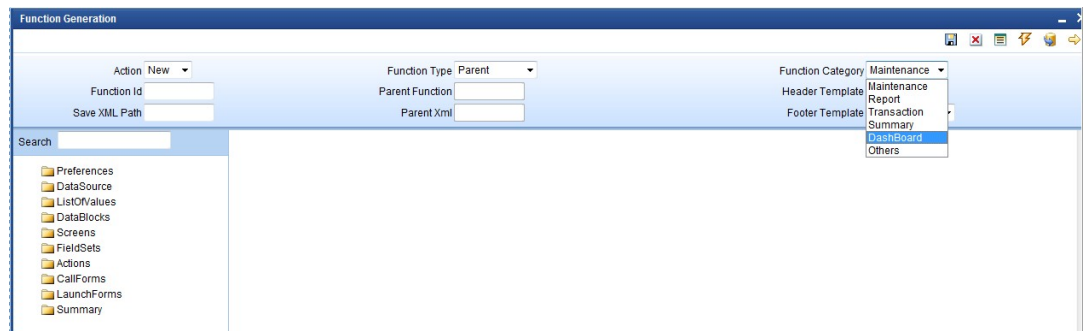


2. Specify the following fields in the **Header** section for **Dashboard Forms**.
For more information on fields, refer to the field description table.

Table 1-1 Function Generation - Field Description

Field	Description
Function ID	Enter Dashboard Id. It follows the same naming convention as anormal function Id.
Action	Select the Action as New .
Function Category	Select Function Category as DashBoard .
Function Type	Select Function Type as Parent .

Figure 1-2 Function Generation_Function Category



This topic contains the following sub-topics:

- [Preferences](#)
This topic describes about the Preferences.
- [Data Sources](#)
This topic describes about the Data Sources.
- [Data Blocks](#)
This topic describes about the Data Blocks.
- [Summary](#)
This topic describes about the Summary
- [Generation of units](#)
This topic describes about the Generation of units.
- [User Maintenance](#)
This topic provides information on User Maintenance.

1.1 Preferences

This topic describes about the Preferences.

Developer can maintain the menu details in Preferences screen.

Figure 1-3 Function Generation_Preferences

① Note

- The **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

1.2 Data Sources

This topic describes about the Data Sources.

The developer can add the table as per the requirement. Please note that the dashboard screen supports only one data source to be added to a screen (which has to be the master data source).

Figure 1-4 Data sources

The screenshot shows the 'Function Generation' window with the 'Data Source Details' tab selected. The left sidebar contains a tree view with folders like 'Preferences', 'DataSource', 'ListOfValues', 'DataBlocks', 'Screens', 'FieldSets', 'Actions', 'CallForms', 'LaunchForms', and 'Summary'. Under 'DataSource', the 'CSW_RM_SCHEME_DTLS' folder is expanded, showing fields: CUSTOMER_NO, SCHEME_ID, SC_END_DT, CUSTOMER_NAME1, ROLE_ID, and TELEPHONE. The main area displays the details for the selected data source:

- Data Source:** CSW_RM_SCHEME_DTLS
- Master:** Yes
- Relation Type:** One To One
- Multi Record:** No
- PK Cols:** CUSTOMER_NO-SCHEME_ID
- PK Types:** VARCHAR2-VARCHAR2
- Upload Table:** (empty)
- Parent:** (empty)
- Relation:** (empty)
- Where Clause:** (empty)
- Default Order By:** (empty)
- Type:** Summary
- Mandatory:** (unchecked)

1.3 Data Blocks

This topic describes about the Data Blocks.

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

Figure 1-5 Data blocks

The screenshot shows the 'Function Generation' window with the 'Block Properties' tab selected. The interface includes a top navigation bar with 'Action' (Load), 'Function Id' (CLDBBOPP), 'Save XML Path' (CLDBBOPP_F), 'Function Type' (Parent), 'Parent Function', 'Parent Xml', 'Function Category' (DashBoard), 'Header Template' (None), and 'Footer Template' (None). A search bar is located below the navigation bar.

The 'Block Properties' section contains the following fields:

- Block Name:** BLK_SCHEME_DTLS
- Block Title:** (empty)
- Parent:** (empty)
- Relation Type:** One To One
- Block PK Fields:** (empty)
- XSD Node:** Scheme-Dtls
- XSD Node Annotation:** (empty)
- Master Block:** Yes
- Multi Record:** No
- Block Type:** Summary

Below the properties, there are two panels: 'Datasource Available' and 'Datasource Added'. The 'Datasource Added' panel contains the entry 'CSW_RM_SCHEME_DTLS'.

The left sidebar shows a tree view of the project structure, including 'Preferences', 'DataSource', 'ListOfValues', 'DataBlocks', 'BLK_SCHEME_DTLS' (selected), 'CUSTOMER_NO', 'SCHEME_ID', 'SCHEME_DESC', 'SC_END_DT', 'CUSTOMER_NAME1', 'ROLE_ID', 'TELEPHONE', 'Screens', 'FieldSets', 'Actions', 'CallForms', 'LaunchForms', and 'Summary'.

This topic contains the following sub-topic:

- [Block Fields](#)

1.3.1 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.

Figure 1-6 Block fields

The screenshot shows the 'Function Generation' window with the 'Block Field Properties' dialog open. The 'Display Type' is set to 'LINK'. The 'DashBoard Link' tab is active, displaying a table with the following data:

Level	Link Type	Function Name
Column	Standard	CODSCMQY

Table 1-2 Block Fields

Field	Description
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.

1.4 Summary

This topic describes about the Summary

Development Workbench currently supports only summary dashboards.

Figure 1-7 Summary Details

The screenshot displays the 'Function Generation' window, specifically the 'Summary Details' tab. The interface includes a left-hand navigation pane with various categories like Preferences, DataSource, ListOfValues, DataBlocks, Screens, FieldSets, Actions, CallForms, LaunchForms, and Summary. The main area contains several configuration fields:

- Action:** Load
- Function ID:** CLDBPNAU
- Function Type:** Parent
- Function Category:** Dashboard
- Header Template:** None
- Footer Template:** None
- Title:** BLK_UNAUTH
- Data Blocks:** CLVW_UNAUTH_TRNS
- Data Source:** Summary
- Summary Type:** Summary
- Summary Screen Size:** Medium
- Default Where Clause:**
- Default Order By:**
- Multi Branch Where Clause:**
- Main Summary Screen:**
- WebServices Required:** (checkbox)

Below these fields, there are three tabs: 'Data Block Fields', 'Custom Buttons', and 'Fields Ordering'. The 'Data Block Fields' tab is active, showing a table of selected fields and their LOV names:

Fields Selected	Query	LOV Name
☐ CUSTOMER_ID	☐	
☐ AC_NO	☐	
☐ CICY	☐	
☐ AMOUNT	☐	
☐ MODULE_CODE	☐	
☐ EVENT	☐	
☐ AC_TYPE	☐	
☒ BRANCH_CODE	☐	

At the bottom, a preview window shows a table with columns: Customer ID, Account Number, Currency, Amount, Module Code, and Event. The table is currently empty.

Attach the block to the summary screen, and therefore, do not 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**.
- Do not include any values in **Default Where Clause**. This has to be maintained by the user through user dashboard maintenance screen in FLEXCUBE.
- Attach the fields which are required in the summary screen.

1.5 Generation of units

This topic describes about the Generation of units.

Following units needs to be generated and deployed for the proper functioning of summary dashboard screen.

1. SYS.js
2. UIXML
3. Menu details inc (smtb_menu)
4. Summary Details inc(cstb_summary_info)
5. Label Details
6. Data source details

1.6 User Maintenance

This topic provides information on User Maintenance.

User must manage the dashboards accessible to them in User Dashboard Maintenance screen in FLEXCUBE. The sequence number of the screens as well as the **Where Clause** for summary screen has to be provided here.