

Oracle® Banking Enterprise Limits and Collateral Management

Development of Dashboard Forms



Release 14.7.5.0.0
G25006-01
September 2024

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Preface

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- [Acronyms and Abbreviations](#)
The list of the acronyms and abbreviations used in this guide are as follows:
- [Symbols and Icons](#)
The lists of symbols, buttons and shortcut key that are used in the application to perform various tasks are covered in this topic.
- [Prerequisite](#)

1.1 Purpose

This guide is designed to help acquaint you with the Oracle Banking Enterprise Limits and Collateral Management (ELCM) application. This guide provides answers to specific features and procedures that the user need to be aware of the module to function successfully.

User can further obtain information specific to a particular field by placing the cursor on the relevant field and pressing <F1> on the keyboard.

1.2 Audience

This guide is intended for the following User/User Roles:

Table 1-1 Audience

Role	Function
Back office data entry clerk	Input functions for funds
Back office managers/officers	Authorization functions
Product Managers	Product definition and authorization
End of day operators	Processing during end of day / beginning of day

1.3 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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.

1.4 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](#).

1.5 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.

1.6 Basic Actions

Table 1-2 Basic Actions

Action	Description
Approve	Used to approve the initiated report. This button is displayed, once the user click Authorize .
Audit	Used to view the maker details, checker details, and report status.
Authorize	Used to authorize the report created. A maker of the screen is not allowed to authorize the report. Only a checker can authorize a report, created by a maker.
Close	Used to close a record. This action is available only when a record is created.
Confirm	Used to confirm the performed action.
Cancel	Used to cancel the performed action.
Compare	Used to view the comparison through the field values of old record and the current record. This button is displayed in the widget, once the user click Authorize .
Collapse All	Used to hide the details in the sections. This button is displayed, once the user click Compare .
Expand All	Used to expand and view all the details in the sections. This button is displayed, once the user click Compare .
New	Used to add a new record. When the user click New , the system displays a new record enabling to specify the required data.

Table 1-2 (Cont.) Basic Actions

Action	Description
OK	Used to confirm the details in the screen.
Save	Used to save the details entered or selected in the screen.
View	Used to view the report details in a particular modification stage. This button is displayed in the widget, once the user click Authorize .
View Difference only	Used to view a comparison through the field element values of old record and the current record, which has undergone changes. This button is displayed, once the user click Compare .
Unlock	Used to update the details of an existing record. System displays an existing record in editable mode.

1.7 Related Documents

For more information refer to the Oracle Banking manuals on:

- Development of Launch Forms and Others Screens
- Enterprise Collaterals User Guide
- Enterprise Limits and Collaterals Common User Guide

1.8 Conventions

The following text conventions are used in this document:

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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.9 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.

1.10 Acronyms and Abbreviations

The list of the acronyms and abbreviations used in this guide are as follows:

Table 1-3 Acronyms and Abbreviations

Acronyms	Abbreviations
CIF	Customer Information File

Table 1-3 (Cont.) Acronyms and Abbreviations

Acronyms	Abbreviations
CASA	Current Account and Savings Account
DDA	System that holds the CASA account and balances
ELCM	Enterprise Limits and Collateral Management
ECA	External Credit Approval
FCUBS	Oracle FLEXCUBE Universal Banking Solution
GW	Gateway
HTTP	Hyper Text Transfer Protocol
ID	Identification Number
Mark EOTI	Mark End of Transaction Input
Mark TI	Mark Transaction Input
OFSA	Oracle Financial Services Analytical Applications
ORMD	Oracle Revenue and Billing Management
PK	Primary Key
RDBMS	Relational Data Base Management System
SMS	Security Services
UI	User Interface
VD	Value Date
XML	Extensible Mark-up Language
XSD	XML Schema Definition
XSLT	Extensible Stylesheet Language Transformations

1.11 Symbols and Icons

The lists of symbols, buttons and shortcut key that are used in the application to perform various tasks are covered in this topic.

Table 1-4 Symbols and Icons

Icons	Function
	Perform search
	Minimize
	Navigate to the next record
	Navigate to the previous record
	Toggle OFF
	Toggle ON
	Delete
	Click this icon to add a new row.

Table 1-4 (Cont.) Symbols and Icons

Icons	Function
	Click this icon to delete an existing row.
	List view
	Maximize
	Navigate to the first record
	Navigate to the last record
	Advance search
	Search record
	Save the record
	Reset the record
	Clear the record

Table 1-5 Symbols and Icons - Audit Details

Icons	Function
	A user
	Branch details
	Date and Time

1.12 Prerequisite

Specify the **User ID** and **Password**, and login to **Home** screen.

2

Introduction

This topic provides information on this document.

3

Create Dashboard Form

This topic describes the systematic instruction to Create Dashboard Form.

1. Log into the Development Workbench and click on Function Generation tab.
2. Select the Action as **New**.
3. Select Function Type as **Parent**.
4. Select Function Category as **Dashboard**.

4

Preferences

This topic describes about the Preferences.

Developer can maintain the menu details in Preferences screen.



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

5

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).

6

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

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.

Table 6-1 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.

7

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 7-1 Block fields

The screenshot shows the Oracle APEX Function Generation interface. The 'Block Field Properties' tab is active, displaying the configuration for a field named 'CUSTOMER_NO'. The 'Display Type' is set to 'LINK'. The 'Dashboard Link' tab is also active, showing a table with the following data:

Level	Link Type	Function Name
Column	Standard	CODSCMOY

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.

8

Summary

This topic describes about the 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.

9

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

10

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.