

Oracle® Banking Enterprise Limits and Collateral Management Development Workbench – Screen Customizer



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Oracle Banking Enterprise Limits and Collateral Management Development Workbench – Screen Customizer, Release 14.8.0.0.0

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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.
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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.

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Introduction

3

Screen Customizer

This topic describes Screen Customizer functionality available in Oracle FLEXCUBE Development Workbench.

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, the developer can use the Screen Customizer feature rather than the Function Generation feature.

Only the screen layout changes and UI field properties will be allowed to change in the Screen Customizer.

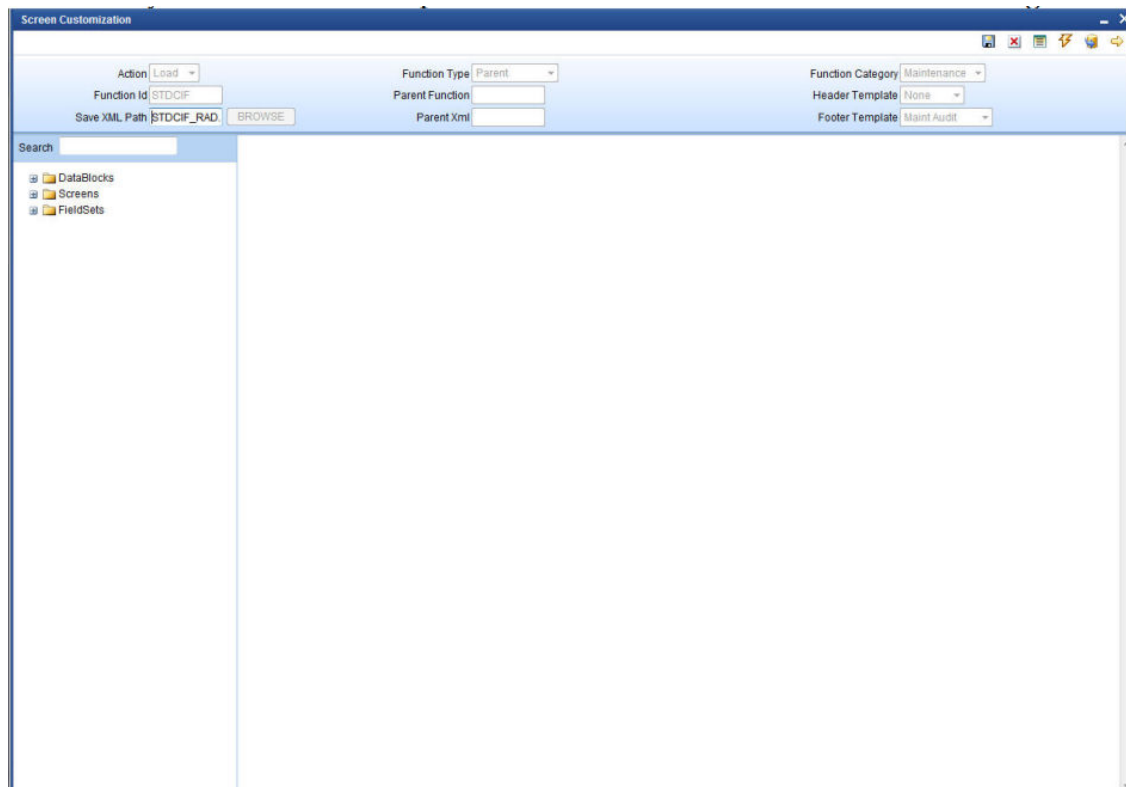


Note:

Only Load action is possible in Screen Customizer.

Only three nodes will be present in Screen Customizer as shown in the figure:

Figure 3-1 Screen Customization



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.

Figure 3-2 Screen Customization- Block Field Properties

The screenshot displays the 'Screen Customization - Block Field Properties' window. The left pane shows a hierarchical tree of 'DataBlocks' including categories like BLK_CUSTOMER, BLK_CUSTCORP, and BLK_CUSTDOMESTIC. The main workspace is titled 'Block Field Properties' and contains numerous input fields and checkboxes. Key fields include 'Field Name' (FLDNAM), 'Field Label' (LBL_FLDNAM), 'DataSource' (STVWS_CUST_LIAB_UDF), 'Column Name' (FIELD_NAME), 'Data Type' (Varchar2), 'Display Type' (Text), 'Item Type' (Database Item), 'Parent Field', 'Related Block', 'Related Field', 'LOV Name', 'Off Line LOV Name', 'Fieldset Name' (FST_LIAB_UDF), 'XSD Tag' (FLDNAM), 'XSD Annotation', 'Field Size' (105), 'Maximum Length', 'Minimum Value', 'Maximum Value', 'Maximum Decimals', 'TextArea Rows', 'TextArea Columns', 'Default Value', 'Preview Value', and 'Mask Id'. To the right, a series of checkboxes control field behavior: Required, Visible, Read Only, Calendar Text, Popup Edit Required, Uppercase Only, LOV Validation Required, Input by LOV Only, Not Required in Xsd, and Report Parameter. At the bottom, the 'Custom Attributes' tab is active, showing a table with columns: Attribute Name, Attribute Value, Active, and Position.

The user will be allowed to change the below properties at the data block field level.

- Display Type
- Field Size
- Preview Value
- Popup Edit Required
- Visible
- Upper Case only
- Read Only

Screens

All the actions can be performed at the screen level. Developers 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.

FieldSet

In fieldset, the developer can change screen properties, display type from Vertical to Horizontal, read-only property, etc. Data Block to which fieldset is attached cannot be changed. Fieldset fields can be re-arranged as per requirement.

Figure 3-3 Screen Customization- Fieldset Properties

Screen 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

Search: Fieldset Properties

Fieldset Name: FST_HEADER1 Screen Name: CVS_MAIN Horizontal Fieldset: ☐

Fieldset Label: Screen Portion: Header Read Only: ☐

Data Block: BLK_CUSTOMER Tab Name: TAB_HEADER Navigation Button: ☐

Multi Record: No Section Name: SEC_1 Visible: ☒

View Type: Single Partition Name: PART1

Fieldset Height: Number Of Rows:

Data Block Fields

CIFCREATIONDT
BTN_GRO
BTN_MIS
BTN_JOINT
BTN_SI
BTN_LE
BTN_TEXT
BTN_HELLO
BTN_IMAGE
BTN_LIM
BTN_CLS
BTN_MTS20BIC
BTN_DOM

Fieldset Fields

Fieldset Fields	Subpartition Name
<input checked="" type="checkbox"/> CTYPE	

Fieldset Properties List:

- DataBooks
- Screens
- FieldSets
 - FST_REMARKS
 - FST_ADDITIONAL2
 - FST_HEADER1
 - FST_ICADCR2
 - FST_HEADER3
 - FST_HEADER4
 - FST_BASIC
 - FST_ADDRESS1
 - FST_PERM_ADDR
 - FST_PASSPORT
 - FST_ADDITIONAL1
 - FST_POWOF_ATTORNEY
 - FST_REGISTRATION
 - FST_BUSN_DESC
 - FST_INCORPORATION
 - FST_ADDRESS2
 - FST_DOMICILE
 - FST_MISC
 - FST_STATUS
 - FST_STATUS2
 - FST_IDENTIFIER
 - FST_CORPDIR1
 - FST_CORPDIR2
 - FST_CORPDIR3
 - FST_CORPDIR4
 - FST_OI_ICHLIST
 - FST_AMLREPORT
 - FST_UTILITY
 - FST_HEADOFFICE
 - FST_FLD_LBL1
 - FST_FLD_LBL2

4

Generated Units

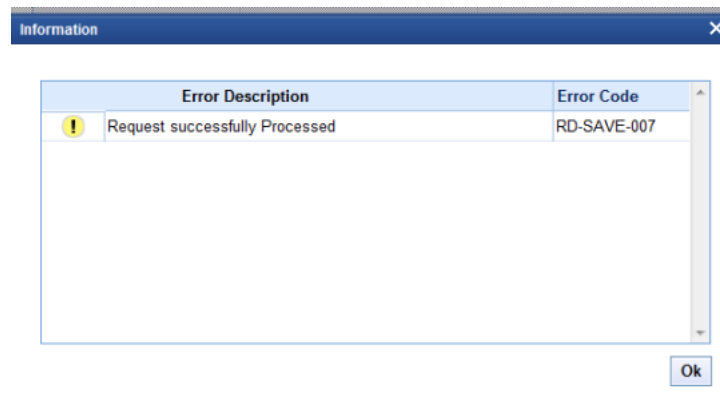
This topic describes UI-related generated units in the Screen Customizer.

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.

Figure 4-1 Information



5

This topic provides different examples for customizing the screens.

Example 1

Requirement: Hide a Field in the screen

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

Figure 5-1 Whereabouts Unknown

Screen Customization

Customer

New

Enter Query

Type

☒ Individual
 ☐ Corporate
 ☐ Bank

Full Name

Customer Category *

Short Name *

Branch Code

Private Customer

☐

Customer No *

Personal

Corporate

Additional

Director

Auxiliary

Check List

Domicile Address

Status

Identifier

☐ Same as Permanent Address

Address 1

Address 2

Address 3

Address 4

Pin Code

Country

☐ Frozen
 ☐ Deceased
 ☐ Whereabouts Unknown

Name

Value

Relationship Manager

RM ID

RM Name

Combined Statement Plan

☐ Auto Generated Statement Plan

Frequency

Select

Statement Day

☐ Eligible for AR-AP Tracking
 ☐ CRM Customer
 ☐ Mailers Required
 ☐ CLS Participant
 ☐ Issuer Customer
 ☐ Treasury Customer
 ☐ Joint Customer
 ☐ MT920
 ☐ Relationship Pricing
 ☒ ELCM Customer

ELCM Customer Number

CIF Status

Since

Misc Details

SWIFT Code

Credit Rating

Group Code

Charge Group

Clearing Group

Tax Group

Exposure

Exposure Category

Customer Classification

External Reference Number

Location

FX Netting Customer

Media

SSN

Group

MIS

Joint

Standing Instructions

Linked Entities

Text

Fields

Image

Limits

CLS Restrictions

MT920

Domestic

Professional

Issuer

Cards

Linked Account

KYC Details

Joint Venture

Account Details

NSF Black list status

Documents

Change Log

Maker

Checker

Date Time:

Mod No

Record Status

Authorization Status

Exit

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

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

Figure 5-2 Unique Identifier

The screenshot displays the Oracle Customer form interface. The 'Identifier' tab is selected, and the 'Unique Identifier' field is circled in red. The form includes various sections for customer information, including Personal, Corporate, Additional, Director, Auxiliary, and Check List. The 'Identifier' section contains fields for Name and Value. The 'Relationship Manager' section includes RM ID and RM Name. The 'Combined Statement Plan' section includes Auto Generated Statement Plan, Frequency, and Statement Day. The 'Misc Details' section includes SWIFT Code, Credit Rating, Group Code, Charge Group, Clearing Group, Tax Group, Exposure, Exposure Category, Customer Classification, External Reference Number, Location, FX Netting Customer, Media, and SSN. The 'Status' section includes checkboxes for Frozen, Deceased, Whereabouts Unknown, Eligible for AR-AP Tracking, CRM Customer, Mailers Required, CLS Participant, Issuer Customer, Treasury Customer, Joint Customer, MT920, Relationship Pricing, and ELCM Customer. The 'ELCM Customer' section includes ELCM Customer Number, CIF Status, and Since. The bottom of the form shows a navigation bar with links to various tabs and a status bar with Maker, Date Time, and Mod No.

As shown in below screenshot Main Tab contains Unique Identifier Field set. This field has to be moved to a new tab

Figure 5-3 Unique Identifier 2

The screenshot displays the Oracle Customer screen customization interface. The left sidebar shows a tree view of the screen structure, with the following items highlighted by red boxes:

- Unique Identifier** (highlighted in the main content area)
- TAB_UNIQ_IDENTIFIER** (highlighted in the left sidebar)
- SEC_S1** (highlighted in the left sidebar)

The main content area shows the configuration for the Unique Identifier. The "Identifier" section is expanded, showing a "Name" field and a "Value" field. The "Name" field is highlighted by a red box. The "Value" field is also highlighted by a red box.

The top of the screen shows the "Customer" header and a "New" button. The "Type" section includes radio buttons for "Individual", "Corporate", and "Bank". The "Full Name" and "Short Name" fields are present, along with a "Branch Code" field. The "Customer No" field is also visible.

The bottom of the screen shows a navigation bar with the following tabs: Group, MIS, Joint, Standing Instructions, Linked Entities, Text, Fields, Image, Limits, CLS Restrictions, MT920, Domestic, Professional, Issuer, Cards, Linked Account, KYC Details, Joint Venture, Account Details, NSF Black list status, Documents, and Change Log. The bottom right corner contains an "Exit" button.