Oracle® Banking Treasury Management

Development Workbench – Getting Started

Release 14.8.0.0.0

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ORACLE®

Oracle Banking Treasury Management Development Workbench – Getting Started, Release 14.8.0.0.0

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Preface

This topic contains the following sub-topics:

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- Basic Actions
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Purpose

This document describes helps developer to familiarize with ORACLE FLEXCUBE Development Workbench for Universal Banking.

Audience

This guide is intended for the central administrator of the Bank who controls the system and application parameters and ensures smooth functionality and flexibility of the banking application.

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.

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.

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.

Related Resources

For more information on any related features, refer to the following documents

- Open Development Tool Installation
- Development Workbench - Administration

Conventions

The following text conventions are used in this document:

Table 1   Conventions

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	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.

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.

Acronyms and Abbreviations

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

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Table 2   Acronyms and Abbreviations

Abbreviation	Description
JRE	Java Runtime Environment
XML	Extensible Markup Language

Basic Actions

Table 3   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.
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.

Symbols and Icons

The following symbols and icons are used in the screens.

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Table 4   Symbols and Icons - Common

Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record

Table 4   (Cont.) Symbols and Icons - Common
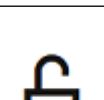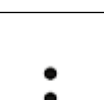
Symbol/Icon	Function
▶	Navigate to the next record
⊞	Grid view
☰	List view
↻	Refresh
+	Click this icon to add a new row.
-	Click this icon to delete an existing row.
🗐	Click to view the created record.
🔓	Click to modify the fields.
⋮	Click to unlock, delete, authorize or view the created record.

Table 5   Symbols and Icons - Audit Details

Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status

Table 6   Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status
	Closed status
	Authorized status

Prerequisite

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

1
Introduction

This topic provides an introduction overview of the development workbench.

This document contains information about the following topics:

- **Explanation of Some Basic Icons and Jargons**
  This topic explains some basic Icons and Jargons.

- **Client Browser**
  This topic provides information on client browsers.

- **Login to Workbench**
  This topic provides systematic instructions to log in to Workbench.

- **FCUBS Launch**
  This topic provides information on launching the FLEXCUBE link directly from Workbench.

- **Setting up User Preferences**
  This topic provides systematic instructions to set up User Preferences.

- **Change Password**
  This topic provides systematic instructions to change the User Password.

1.1 Explanation of Some Basic Icons and Jargons

This topic explains some basic Icons and Jargons.

Table 1-1   Icons and Jargons

Icons	Function
	The new button is used to add a new User, Environment, Release, etc.
	The save button is used to save the work done by the user.
	The close button clears all the data on the screen and all buttons will be reset to the initial position.
	Enter query button to retrieve existing data from the screen. The primary key field will be get enabled.
	Execute query button. This gets enabled on clicking the Enter query button. After clicking this button all the required data gets retrieved and displays on the screen.
	Unlock button used to modify the existing record. On click of this, all fields except primary key fields get enabled.
	List Of Values

Table 1-1   (Cont.) Icons and Jargons

Icons	Function
	To add New labels or modify existing labels in the FLEXCUBE schema.
	Generate Files.
	Deploy Files.
	Release Files.

Radxml: Workbench saves all the activities carried out by the developer in an XML file referred to as **Radxml**.

Rad/RadTool/ODT: These terms also refer to FLEXCUBE Development Workbench for Universal Banking.

1.2 Client Browser

This topic provides information on client browsers.

- **Recommended Browsers**:
  - **Microsoft Internet Explorer 8.0**: The version of **Microsoft Internet Explorer 8.0** should not be a Beta version, Partner Build, or a Release Candidate. It should be the Final build of Microsoft Internet Explorer 8 or later. The minimum version of Microsoft Internet Explorer 8 should be **8.0.6001.18702**. This can be verified by visiting the **About Internet Explorer** dialog in the **Help** menu as shown below.

Figure 1-1   About Internet Explorer

- – **Mozilla Firefox**
- – **Google Chrome**
- **Recommended Screen Resolution**: 1280*1024 pixels
- Setting up Internet Explorer
  This topic provides systematic instructions for setting up Internet Explorer to enable writing to Client Machines.

1.2.1 Setting up Internet Explorer

This topic provides systematic instructions for setting up Internet Explorer to enable writing to Client Machines.

ActiveX Scripting has to be enabled to read and write files in the Client Machine. Therefore, certain settings are required in the browser to generate the files in the client machine (instead of downloading as Zip from server); Client Mode is supported only in Internet Explorer.
MSXML 6.0: Microsoft Core XML Services (MSXML 6.0) need to be installed in the system and can download from MSXML 6.0

1. Open **Internet Explorer** and click on the **Tools** icon at the top right corner.

2. Click on the **Internet options** from the drop-down options.

   Internet options window displayed.

Figure 1-2   Internet options
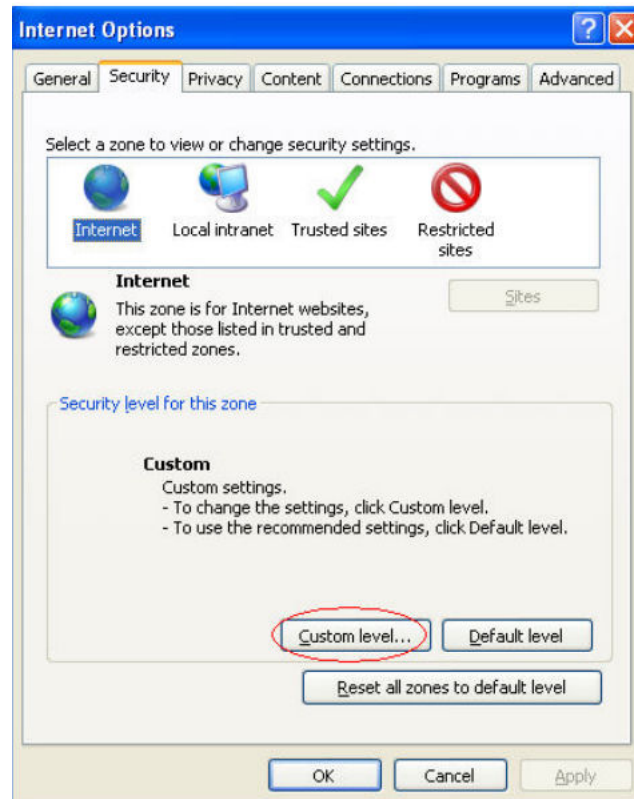
3. Click the **Security** tab and then select the **Internet** option from **Select a zone to view or change security settings**.

4. Click the **Custom level** button from the **Security level for this zone**.

   Security Settings- Internet Zone screen displayed.

Figure 1-3   Security Settings- Internet Zone
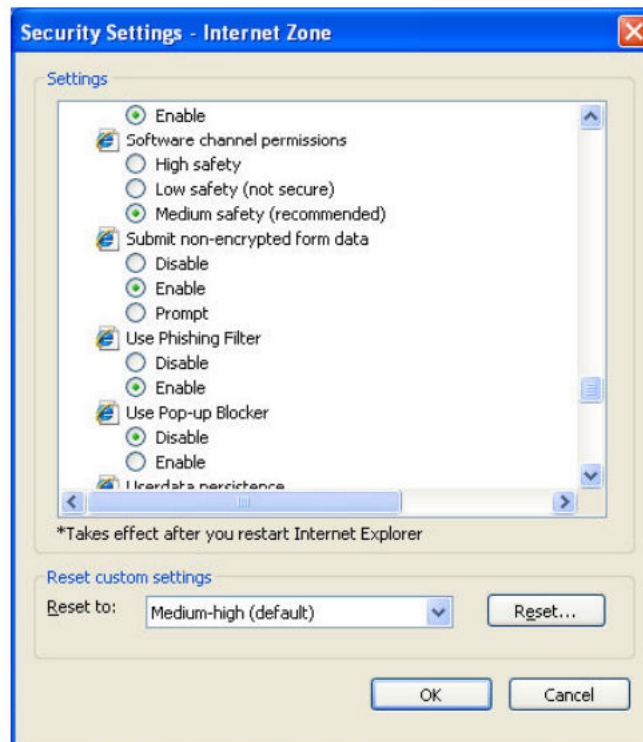
Figure 1-4   Security Settings- Internet Zone

5. Enable following options:

    •   **Allow previously unused ActiveX controls to run without prompt**

    •   **Allow scriptlets**

    •   **Automatic prompting for ActiveX controls**

    •   **Binary and script behaviors**

    •   **Only allow approved domains to use ActiveX control without prompt**

    •   **Run ActiveX controls and plug-ins**

    •   **Script ActiveX controls marked safe for scripting**

    Mark all option mentioned above as **Enable**, except **Use Pop-up Blocker**.

6. Click **OK** to save the changes.

7. Navigate to the **Internet options** window again and then select the **Local Intranet** option from **Select a zone to view or change security settings**.

8. Click **Ok** from the **Security level for this zone**.

    Security Settings- Local Intranet Zone screen displayed.

Figure 1-5   Security Settings- Local Intranet Zone
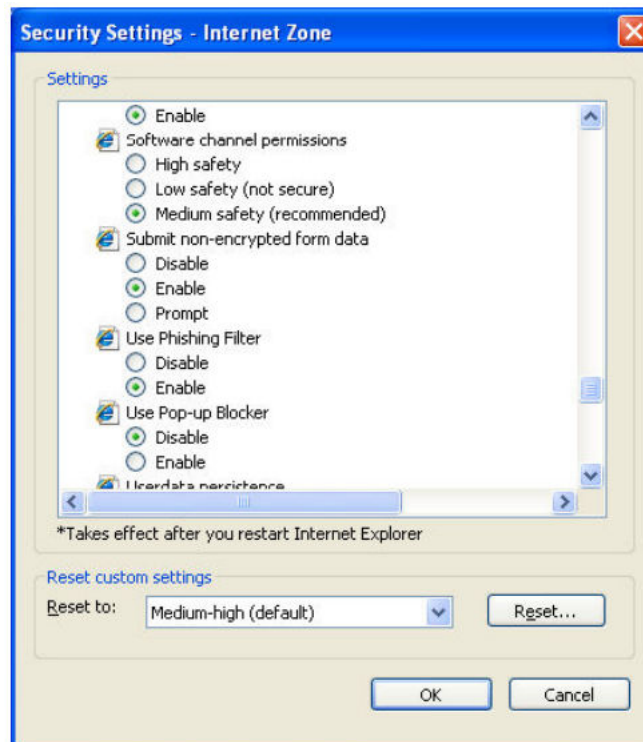
Figure 1-6   Security Settings- Local Intranet Zone

9. Enable following options:

- **Allow previously unused ActiveX controls to run without prompt**

- **Allow scriptlets**

- **Automatic prompting for ActiveX controls**

- **Binary and script behaviors**

- **Only allow approved domains to use ActiveX control without prompt**

- **Run ActiveX controls and plug-ins**

- **Script ActiveX controls marked safe for scripting**

Mark all option mentioned above as **Enable**, except **Use Pop-up Blocker**.

10. Click **OK** to save the changes.

11. After all these settings, navigate to the **Advanced** tab and select the checkbox **Use JRE (Version) for <applet>(requires restart)**.

Figure 1-7   Internet options- Advanced tab
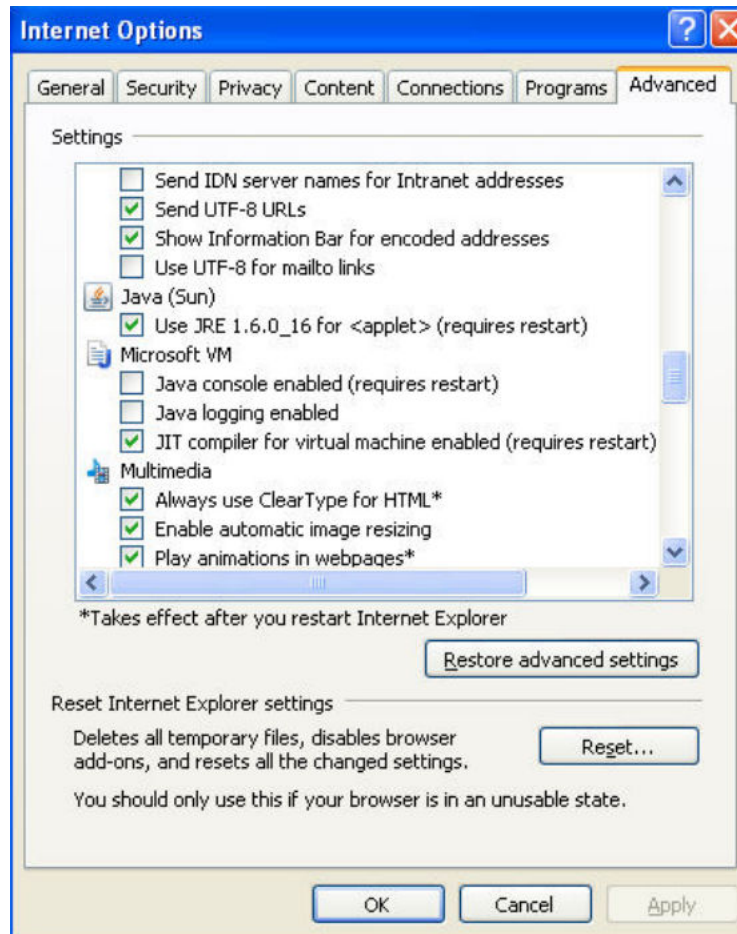
Figure 1-8   Internet options- Advanced tab

12. Click **OK** to save the changes.

1.3 Login to Workbench

This topic provides systematic instructions to log in to Workbench.

Developers will be provided with login credentials for Workbench that has to use for accessing the Tool. After installation, an initial login credentials will be **RADTOOL/RADTOOL**. By using these credentials, the developer has to create release, environment, and users.Refer Development Workbench – Administration for further details.

- Login to the **ORACLE FLEXCUBE Development Workbench for Universal Banking** with initially provided credentials.

  On successful login, the Workbench landing page is displayed. Based on the role, the browser will display the available options to the user in a tree view.

Figure 1-9   Development Workbench for Universal Banking- Browser

Table 1-2   Browser Menu

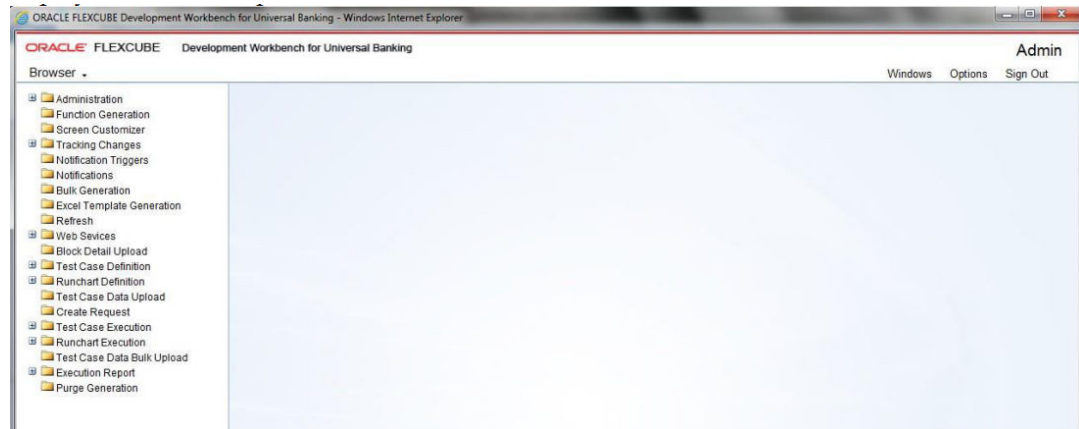| Browser Menu	Description
Administration	This is used to add releases, environments, and users.
Function Generation	This is used to design the FLEXCUBE screens.
Screen Customizer	This is used to design the FLEXCUBE screens. The main difference between **Function Generation** and **Screen Customizer** is that **Screen Customizer** allows user to just modify the screen layout. No additions and deletions are allowed.
Tracking Changes	This module helps in tracking the changes done in a particular release. A change report can be generated OR the changes can be viewed.
Notification Triggers	This will be used to create notification triggers.
Notification	This will be used to create notification XML.
Bulk Generation	This option is used to generate all output files for a set of Radxml at one time.
Excel Template Generation	This option will be used to generate an excel template out of Radxml which can be used to upload data into FLEXCUBE.
Refresh	This option will be used to upgrade Radxml from a lower version to a higher version and to update child Radxml with parent changes.
Web Services	Artifacts required for the creation of a Web service can be generated using this feature.
Block Detail Upload	This option will be used to upload block detailed information into schema from a set of Radxml at one time.
Test Case Definition	This option will be used to define new test cases and modify existing test cases.
Run Chart Definition	This option will be used to define run charts for test cases.
Test Case Data Upload	This option will be used to upload test case data for the defined test cases. Data has to be uploaded in the standard excel formats.
Create Request	This option will be used to create request XML (compatible with the FLEXCUBE) for a test case data set.
Test Case Execution	This option is used to execute test cases on the FLEXCUBE environment
Run Chart Execution	This option will be used to execute run chart on the FLEXCUBE environment.

Table 1-2   (Cont.) Browser Menu

Browser Menu	Description
Test Case Data Bulk Upload	This option will be used to upload multiple test case data at one time.
Execution Report	This option generates a report for the executed test cases and run charts.

Table 1-3   ORACLE FLEXCUBE Development Workbench- Other options

Field	Description
Windows	It will display all opened windows in the drop-down menu. The user can select the required window to show on top of the tool.
Sign Out	Click the **Sign Out** button to log out from the FLEXCUBE Development Workbench. All opened windows will get closed automatically and it will redirect the user to the login page.
Options	Click the **Options** to access multiple options as follow: • **User Preferences** • **Change Password** • **Launch FLEXCUBE UBS** • **Accessibility Help** • **About**

1.4 FCUBS Launch

This topic provides information on launching the FLEXCUBE link directly from Workbench.

The user has to maintain the correct FLEXCUBE URL while adding to the environment. Refer Development Workbench – Administration for the details on environment creation.

Figure 1-10   Environment Master

1.5 Setting up User Preferences

This topic provides systematic instructions to set up User Preferences.

1. On Workbench page, click **Options** at top right corner.

2. Select **User Preferences** option from the drop-down menu.

    Preferences screen displayed.

Figure 1-11   Preferences

3. Specify the following details:

By default, the user will be mapped to a Release code and its corresponding environment details. The preferences details can be modified if the developer wants to change the working release or environment.

Table 1-4   Preferences- Field Descriptions

Field	Description
Language Code	The default language of the environment can be changed if required
Save Mode	The default save mode of the user would be displayed here and can be changed if required.
Work Directory	If the Save Mode is modified, the Work Directory can be modified.
Excel Format	Excel Format can be changed from the value defined at the **User Definition** screen.
XML Indentation	Check the **XML Indentation** option for the generated XML files indentation.

4. After changing the required fields, click the **OK** to save the changes.

The recent changes in release, environment, or work directory will affect only the current session. Default release details will be assigned again on the sign-out and re-login to the Workbench. If the developer wishes to change default settings for the user, the same above changes can be done by modifying the default options in the Administration section.
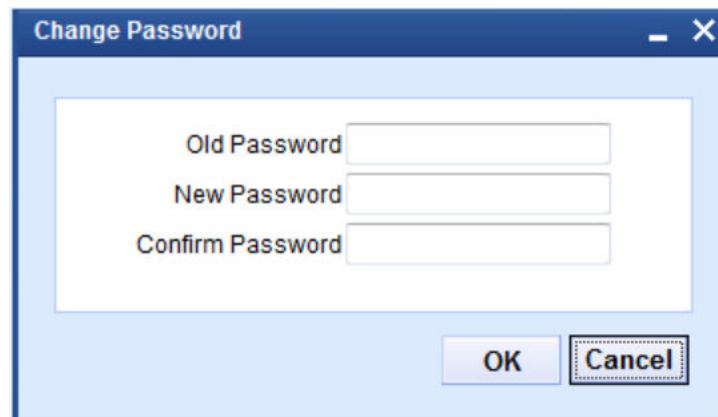
1.6 Change Password

This topic provides systematic instructions to change the User Password.

1. On Workbench page, click the **Options** at top right corner.

2. Select **Change Password** option from the drop-down menu.

   Change Password window displayed.

Figure 1-12   Change Password

3. Enter the **Old Password**, **New Password** and**Confirm Password** fields.

4. Click on **OK** to change the password.

   On successful change, the **Information** screen displays with a message.

Figure 1-13   Information

Glossary

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