Oracle® Banking Treasury Management

Development Workbench- Customer Landing Page

Release 14.8.1.0.0

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Oracle Banking Treasury Management Development Workbench- Customer Landing Page, Release 14.8.1.0.0

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Contents

Preface

This document describes the steps to develop the notification XML and notification trigger using Oracle FLEXCUBE Development Workbench.

- Audience
- Documentation Accessibility
- Critical Patches
- Diversity and Inclusion
- Basic Actions
- Related Documents
- Conventions
- Screenshot Disclaimer
- Symbols and Icons
- Prerequisite

Audience

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

Table 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

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.

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.

Basic Actions

Table 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.
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**.

Table 2 (Cont.) Basic Actions

Action	Description
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.

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

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.
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.

Symbols and Icons

The following symbols and icons are used in the screens.

Table 3 Symbols and Icons - Common

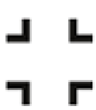
Symbol/Icon	Function
	Minimize

Table 3 (Cont.) Symbols and Icons - Common

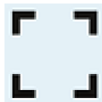
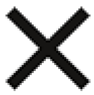
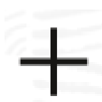
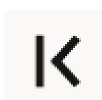
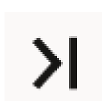
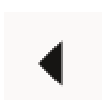
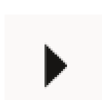
Symbol/Icon	Function
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record

Table 3 (Cont.) Symbols and Icons - Common

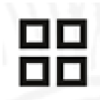
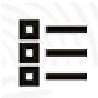
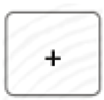
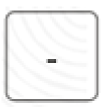
Symbol/Icon	Function
	Grid view
	List view
	Refresh
	Click this icon to add a new row.
	Click this icon to delete an existing row.
	Click to view the created record.
	Click to modify the fields.
	Click to unlock, delete, authorize or view the created record.

Table 4 Symbols and Icons - Audit Details

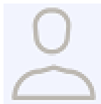
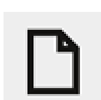
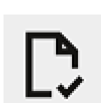
Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status

Table 5 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 Overview of Customer Landing Page Development

This topic describes the process of customer landing page development for Oracle FLEXCUBE Universal Banking.

Oracle FLEXCUBE Universal Banking Open Development Tool provides the developer with a user-friendly console for designing and developing screens for Oracle FLEXCUBE Universal Banking.

Open Development Tool assists developers in designing screens with the capability of generating front-end scripting files, PL/SQL packages, Static data scripts, XSDs, Excel templates, and HTML files. This generated code performs validations and does some processing which is common across screens in Oracle FLEXCUBE Universal Banking, only the Business Logic specific to the screen has to be added by the developer in the back end and front end units.

For example,

- **Release Name** - FC 12.1
- **Release Type** - KERNEL, CLUSTER, CUSTOM

Open Development Tool generates all files, and developers are supposed to add the business logic in designated units depending on the **Release Type**.

RADXML

Open Development Tool saves all the activities carried out by the developer in an XML file hereby referred to as RADXML. The persistence of the screens is achieved through RADXML. All the units required to work a screen can be generated from its RADXML.

If some changes are required on the screen in a future release, the same RADXML can be loaded and changes can be done on this RADXML. Open Development Tool can segregate the changes done on different releases and save the RADXML accordingly.

Naming convention of the RADXML: **Function ID Name + _RAD.xml**

For example, **STDCULND_RAD**

Extensible Development

In an extensible framework, any development on Oracle FLEXCUBE Universal Banking is classified on any of the following stages (also referred to as release type):

Table 1-1 Development Stages

Development Stages	Description
KERNEL	This refers to the core product. For example, FC 12.1
CLUSTER	This refers to any region-specific enhancements/developments done on top of the kernel product. The changes done in a cluster pack will be non-invasive to the kernel product. For example, FC 12.1 India cluster

Table 1-1 (Cont.) Development Stages

Development Stages	Description
CUSTOM	Any enhancements required by the customer/bank are done on this level. It will be non-invasive of the changes done in kernel and cluster packs. For example, Customizations for the MODEL bank on FC 12.1 India cluster

Open Development Tool can segregate the changes done on different releases and save the RADXML accordingly. It generates the files depending on the release type and developers can add the business logic to the release type-specific files. Thus the code remains non-invasive of the existing code.

Design Steps

The sequence of steps to be followed while developing a screen in the Open Development Tool:

1. Identifying the Data Sources and their Relations
2. Logically Grouping the Data Sources into Data Blocks
3. Designing Screen Layout
4. Logically Grouping the Block Fields into Fieldsets
5. Attaching Call Forms and Launch Forms if any
6. Defining LOVs
7. Designing Summary
8. Defining Actions

Refer to respective sections for a detailed explanation of each step.

While development, save RADXML at constant intervals. Click **Save** in the top right to save the work. RADXML would be saved in the user directory maintained.

2
Create a New Function in Customer Landing Page

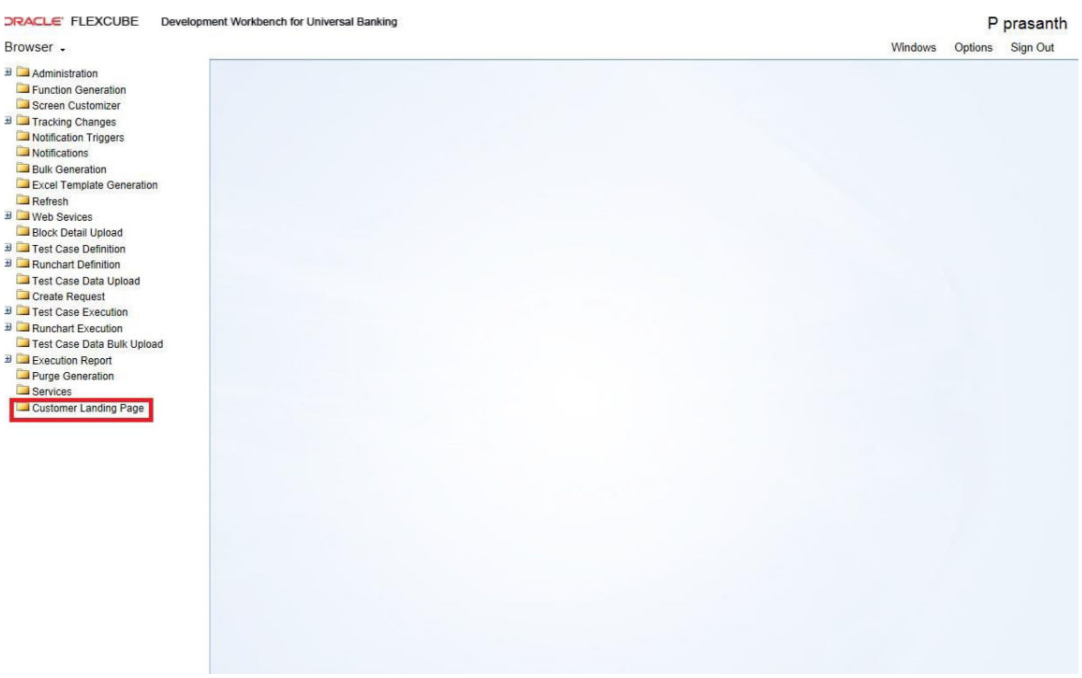
This topic explains systematic instructions to create a new function in the Customer Landing Page.

On the Development Workbench Login page, specify the **User ID** and **Password**, and login to the Development Workbench Landing page.

1. On **Expand Menu**, click **Customer Landing Page** node.

   The **Customer Landing Page** screen displays.

Figure 2-1 Customer Landing Page



2. On the **Customer Landing Page** screen, specify the fields to create a new function.

Table 2-1 Customer Landing Page - Field Description

Field	Description
Action	Select one of the following actions: • **New** - Select this option for new screen development. • **Load** - Select this option to load the existing screen RADXML for customization. If the **Load** action is selected, the **Save XML Path** option changes to **Load Screen XML**. Select the corresponding RADXML by clicking **BROWSE** in the **Load Screen XML** field. All the header information will get populated.

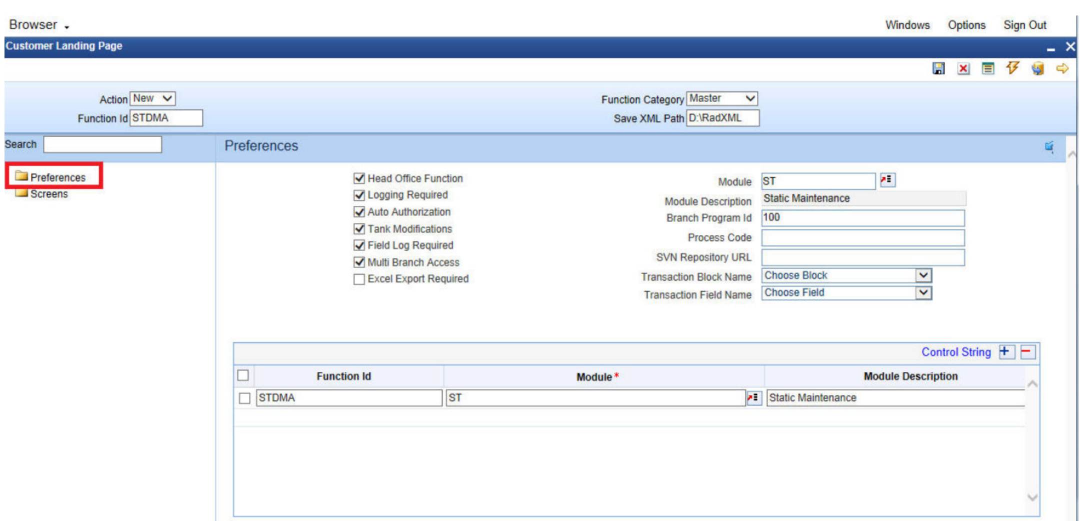
Table 2-1 (Cont.) Customer Landing Page - Field Description

Field	Description
Function ID	If the **Action** is selected as **New**, specify the function ID. **Function ID** is the unique name with which a screen is identified. Function Id name should follow the Oracle FLEXCUBE Universal Banking standard naming convention as below: • **Function ID** must have a maximum length of 8 characters. • For detail screens, the third character must be **D**. • For report screens, the third character must be **R**. • For Call Form Function IDs, the third character must be **C**. • The first 2 characters must specify the module name for which the particular function ID is used (recommended).
Save XML Path	The label description of the field changes depending on the **Action**. If the action is **Load**, Open Development Tool enables the **Browse**, so that the user can browse the RADXML and load it.
Function Category	Select the function category from the drop-down list: • **Master** - Select this option to create a master function. • **Detail** - Select this option to add tables and other information. This option is used to develop tables, fieldsets, blocks etc. in the **Customer Landing Page**. For reference, refer to the Development of Launch Forms and Others Screens document. • **Summary** - **Summary** screen in **Customer Landing Page** is similar to **Summary** screen in normal function generation. Refer to the Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development for detailed information. • **Tabs** - The **Tabs** screen is part of the **Master** screen. The **Tabs** screen contains a group of screens in it. Each screen is detailed under each tab. • **Subsystems** - This category is used to display subsystem buttons to launch screens.

3. On the **Customer Landing Page** screen, click the **Preferences** node at the left panel.

   The **Preferences** screen displays.

Figure 2-2 Preferences



Function ID levels preferences like **Module**, **Logging Required**, **Tank Modification**, **Main Menu**, **Sub-Menu1**, and **Sub-Menu2** are maintained through the **Preferences** screen in Open Development Tool.

The data maintained in the **Preferences** screen are used for generating static data scripts for tables **SMTB_MENU**, **SMTB_FUNCTION_DESCRIPTION**, **SMTB_ROLE_DETAIL**, and **SMTB_FCC_FCJ_MAPPING**.

4. On the **Preferences** screen, specify the fields.

Table 2-2 Preferences

Field	Description
Module	Click **Search** and select the module from the list of values. The developer can select the module name from the list of values provided. The list of values is populated based on the modules maintained in the **SMTB_MODULE** table of the business schema (the current Oracle FLEXCUBE Universal Banking environment to which the tool is mapped). Module code has to be provided mandatory. The module name provided would be reflected in the script for **SMTB_MENU** generated by Open Development Tool (in the module column). This will also be considered while naming the packages generated by the tool. The first two characters of the packages generated will be taken from the module code maintained.
Module Description	The system displays the **Module Description** based on the **Module** selected.
Head Office Function	Check this box to indicate the function is a head office function. It will be reflected in the static script for **SMTB_MENU** in column **HO_FUNCTION**. If the function is a head office function, then only query operation will be possible at all the other branches for the particular screen.
Logging Required	Check this box to indicate that logging is required for the function. This will also be reflected in the script generated for **SMTB_MENU** (column **LOGGING_REQD**). If this box is checked, all the requests and responses for the function ID will be logged in **CSTB_MSG_LOG**. This is used for the **View Change** option.
Auto Authorization	Check this box to indicate that auto authorization is allowed for the function. This will also be reflected in the script generated for **SMTB_MENU** (column **AUTO_AUTH**). **Note** **Auto Authorization** is possible only if it is allowed at the function ID level, user level, and branch level.
Tank Modification	Check this box to indicate that modification is to be tanked for the function. This will be reflected in the **TANK_MODIFICATIONS** column of the **SMTB_MENU** table script. If the **Tank Modification** box is checked, then the record in that screen would be logged to logging tables and taken up for processing (untanking) in the later stage during EOD operations. Currently, this is applicable only for maintenance screens.

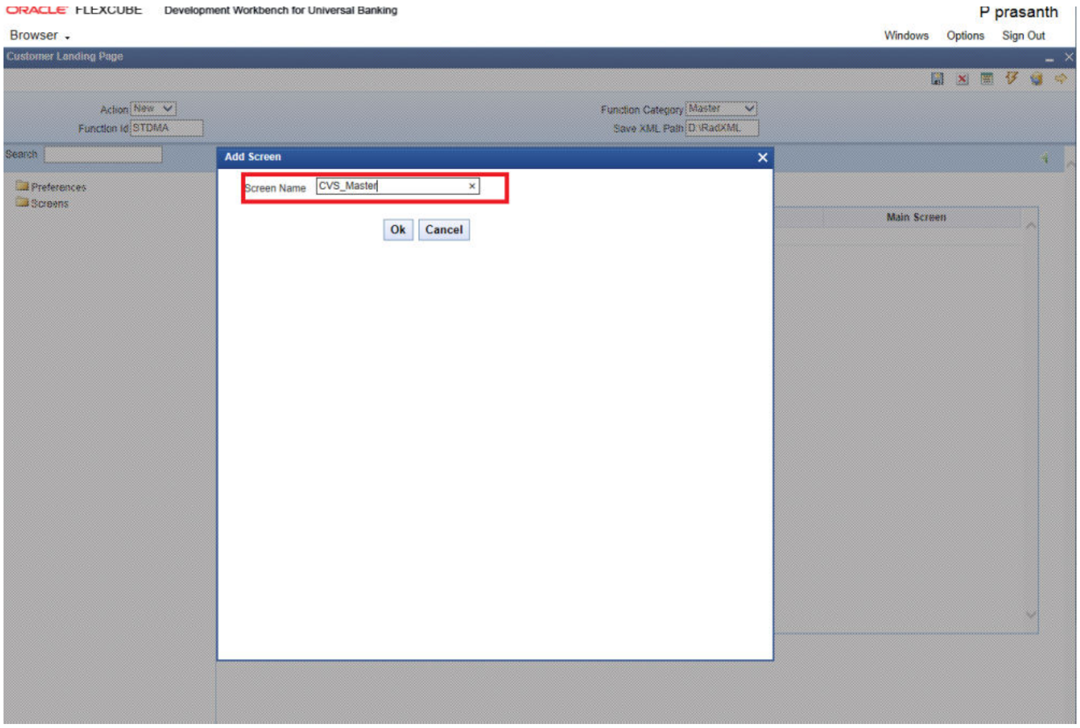
Table 2-2 (Cont.) Preferences

Field	Description
Field Log Required	Check this box to indicate that logging is required for the function. This will be reflected in the **FIELD_LOG_REQD** column in **SMTB_MENU**. If the **Field Log Required** box is checked, then all operations on the screen will be logged to logging tables (**STTB_FIELD_LOG.STTB_RECORD_LOG**, etc). Currently, this is applicable only for maintenance screens.
Excel Export Required	Check this box to export records from the summary screen to excel.
Multi Branch Access	Check this box to indicate that multi-branch access is required for the function ID. This will be reflected in the **MULTIBRANCH_ACCESS** column of the **SMTB_MENU** table script generated. If the **Multi Branch Access** box is checked, then records of different branches for the screen can be modified from a single branch.
Module Auto Authorization	Check this box to indicate that module auto authorization is allowed for the function.
Java Functions	Check this box to indicate that Java functions are enabled.
GateWay Screen	Check this box to indicate that Gateway screen are enabled.
Transaction Block Name	This field shows the transaction block name. This is applicable only if the **Multi Branch Access** box is checked for the screen. Select the block from the list of values which contains the field for the branch code.
Transaction Field Name	This field shows the transaction field name. This is applicable only if the **Multi Branch Access** box is checked for the screen. The list of values provides all the block fields for the transaction block selected. Select the field for branch code from the list. **Transaction Block Name** and **Transaction Field Name** will be reflected in the system JavaScript file (SYS js) generated by Open Development Tool. The developer has to code for querying the records based on the branch code value of this field.
Branch Program ID	It captures the branch program ID for the function.
Process Code	This can be used to map which process needs to be initiated during the screen launch. This is used for the work flow screens.
Module Group	Click **Search** and select the module group from the list of values.
SVN Repository URL	This is applicable only if integration to SVN (version control tool) is required. Path of the SVN repository till the module needs to be provided in this field. In the multiple-entry block, the developer needs to maintain all the related function ID names for the screen. Open Development Tool will default the name of the function Id to the first row of the multiple entries along with the module maintained earlier. If any other function ID is required for the particular screen, the developer has to add the row. For example, for the **FTDTRONL** screen, the developer designs a detailed screen. The user also wants to add one summary screen to the screen as well as a gateway function Id for web services. For this, the user can add two new columns **FTSTRONL** (for the summary) and **FTGTRONL** (for gateway operations) to the block as shown below.

5. Click **Save**.
6. On the **Customer Landing Page** screen, right-click on the **Screens** node, and select **Add**.

   The **Add Screen** window displays.

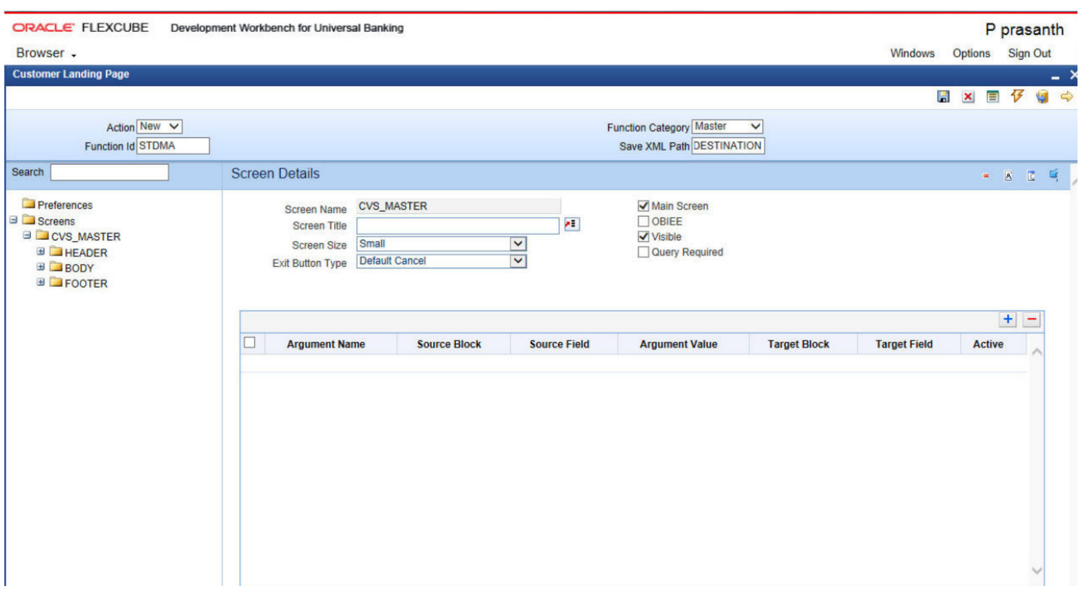
Figure 2-3 Add Screen



7. Specify the name as **CVS_Master** in the field **Screen Name**, and click **OK**.

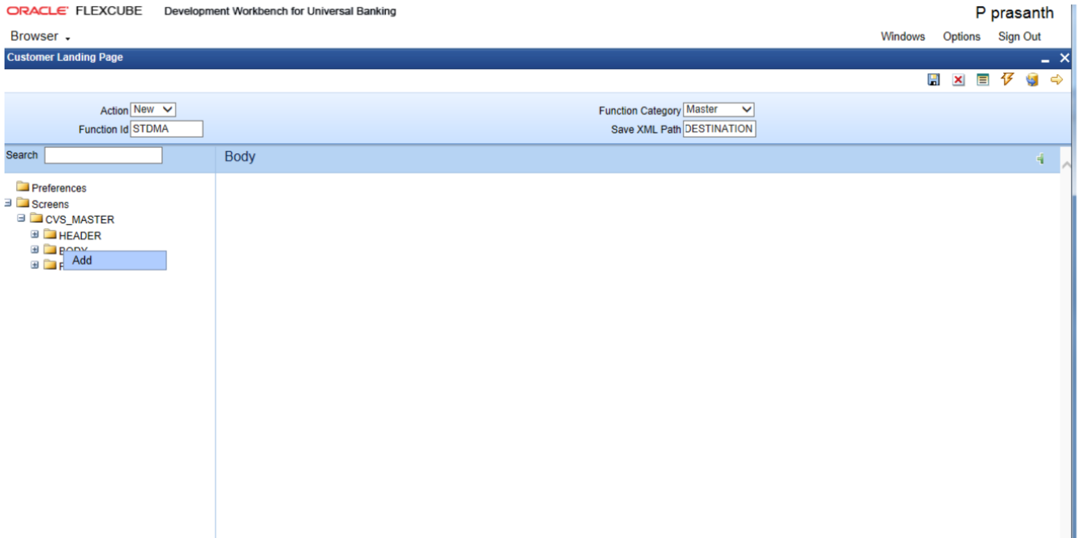
   The **Screen Details** screen displays.

Figure 2-4 Screen Details



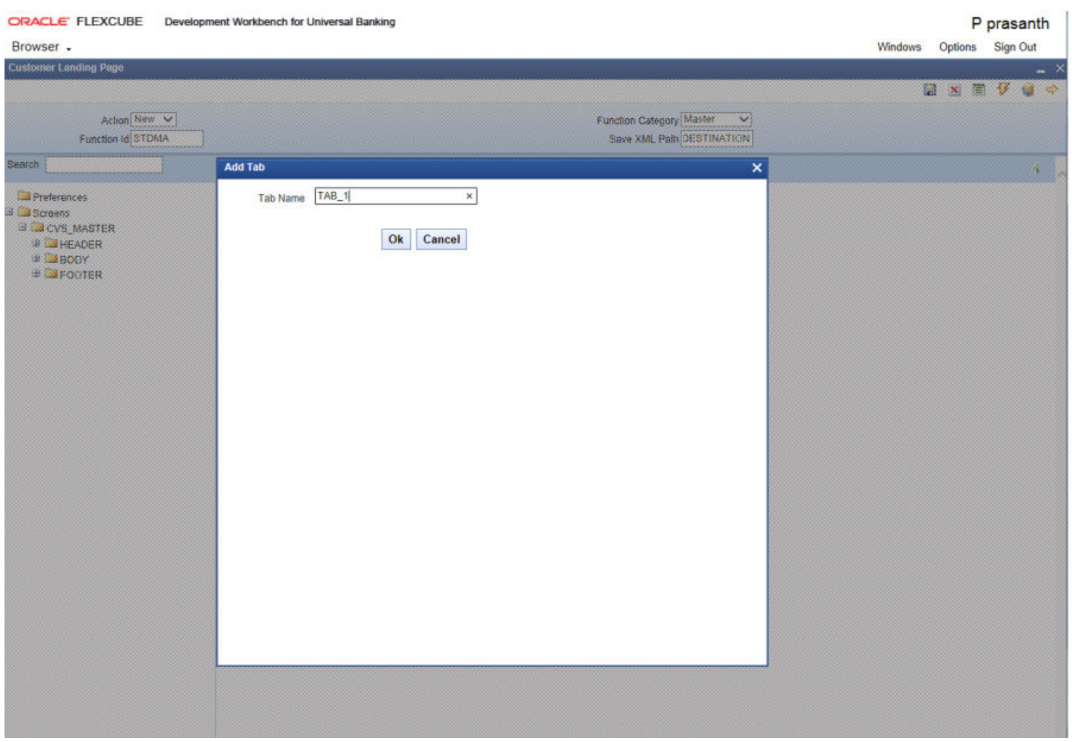
8. Click **Save** to save the new screen.
9. To add a tab for the newly created screen, click on the newly created screen under the **Screens** node.
10. Right-click on the **Body** of the screen, and select **Add**.

Figure 2-5 Customer Landing Page- New Tab Creation



The **Add Tab** window displays.

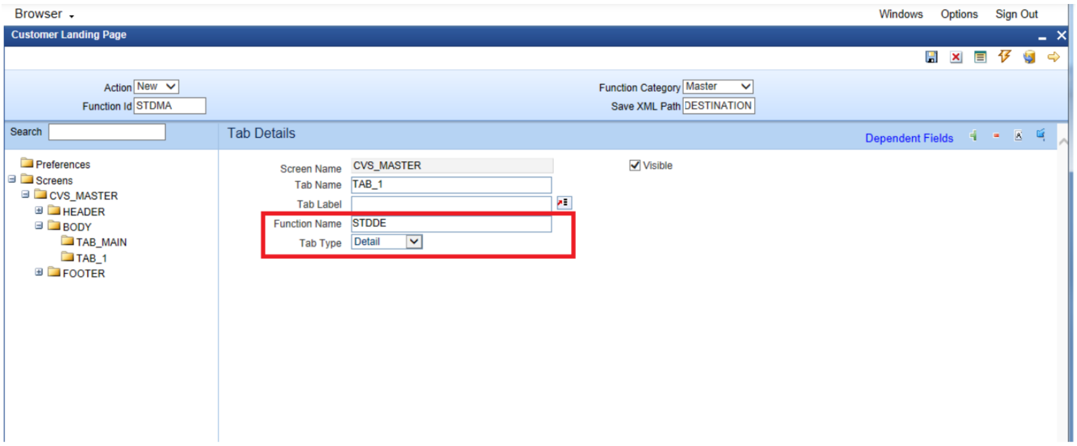
Figure 2-6 Add Tab



11. Specify the **Tab Name** as **Tab_1**, and click **OK**.

    The **Tab Details** screen displays.

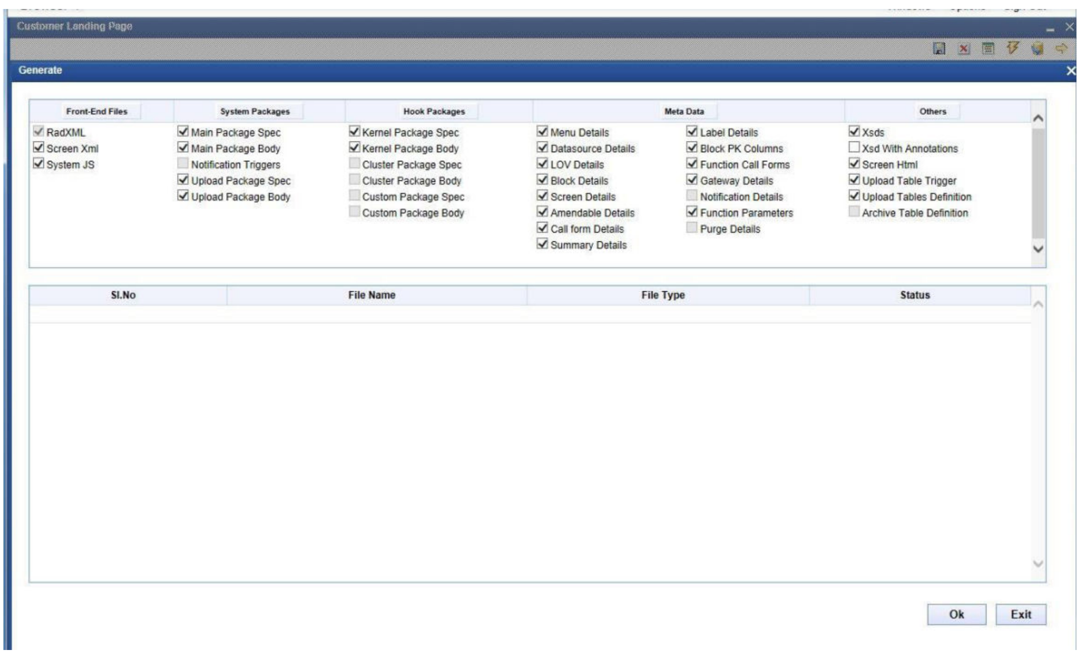
Figure 2-7 Tab Details



12. Specify the **Tab Name** and **Tab Label** fields.
13. For generating RADXML and other artifacts, click **Generate** at the top right corner of the screen.

    The **Generate** screen displays.

Figure 2-8 Generate



14. Click **OK**.