

Oracle® FLEXCUBE Investor Servicing Development Workbench - Getting Started



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Preface

Oracle FLEXCUBE Investor Servicing is a comprehensive mutual funds automation software from Oracle® Financial Servicing Software Ltd.©.

You can use the system to achieve optimum automation of all your mutual fund investor servicing processes, as it provides guidelines for specific tasks, descriptions of various features and processes, and general information.

This topic contains the following sub-topics:

- [Purpose](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Critical Patches](#)
- [Diversity and Inclusion](#)
- [Conventions](#)
- [Screenshot Disclaimer](#)
- [Prerequisite](#)
- [Related Resources](#)

Purpose

This manual is designed to help FLEXCUBE Application developers/users to familiarize with ORACLE FLEXCUBE Development Workbench for Investor Servicing.

Audience

This document is intended for FLEXCUBE Application developers/users that use Development Workbench to develop various FLEXCUBE components.

To Use this manual, you need conceptual and working knowledge of the below:

Table 1 Proficiency and Resources

Proficiency	Resources
FLEXCUBE Functional Architecture	Training programs from Oracle Financial Software Services.
FLEXCUBE Technical Architecture	Training programs from Oracle Financial Software Services.
FLEXCUBE Object Naming Conventions	Development Overview Guide

Table 1 (Cont.) Proficiency and Resources

Proficiency	Resources
Working knowledge of Web based Applications	Self-Acquired
Working knowledge of Oracle Database	Oracle Documentations
Working knowledge of PLSQL developer	Respective vendor documents
Working knowledge of PLSQL and SQL Language	Self-Acquired
Working knowledge of XML files	Self-Acquired

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 customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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.

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.
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.

Prerequisite

Specify **User ID** and **Password**, and log in to **Home Screen**.

Related Resources

The functions of ORACLE FLEXCUBE Development Workbench for Investor Servicing system is organized into various guides, each discussing a component.

For more information, see these Open Development Tool documents:

- *Open Development Tool Installation*
- *Development Workbench - Administration*
- *Development Workbench - Screen Development I*
- *Development Workbench - Screen Development II*
- *Development Workbench - Screen Customizer*
- *Development Workbench - Notifications*
- *Development Workbench - Bulk Generation*
- *Development Workbench - Source Upgrade*
- *Development Workbench - Tracking Changes*
- *Child and Screen Childs - Concept and Design*
- *Development of Maintenance Form*
- *Development of Online Form*
- *Development of Call Form*
- *Development of Launch Forms and Other Screens*
- *Development of Dashboard Form*
- *Development Workbench Service XML Development*
- *Development Workbench Performance Tuning Enhancements*
- *Development Workbench - Rest Services Development*

1

Getting Started

This topic offers guidance on getting started with the Development Workbench.

This topic contains the following sub-topics:.

- [Explanation of Some Basic Icons and Jargons](#)
This topic explains some basic Icons and Jargons.
- [Client Browser Settings](#)
This topic provides information on Client Browsers settings.
- [Log in to Development Workbench](#)
This topic provides the instructions to log in to Development Workbench.
- [Start FLEXCUBE Development Workbench](#)
This topic provides information on launching the FLEXCUBE link directly from Workbench.
- [Set up User Preferences](#)
This topic provides the systematic instructions to set up User Preferences.
- [Change Password](#)
This topic provides the systematic instructions to change the User Password.
- [Sign Out](#)
This topic provides instructions for signing out of FLEXCUBE Development Workbench.
- [About](#)
This topic provides an overview of the About option in the FLEXCUBE Development Workbench.

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.

Table 1-1 (Cont.) Icons and Jargons

Icons	Function
	Unlock button. This is used to modify the existing record. On click of this, all fields except primary key fields get enabled.
	List Of Values
	To add New labels or Modify existing labels in the FLEXCUBE schema.
	To generate Files.
	To deploy Files.
	To 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 Investor Servicing.

1.2 Client Browser Settings

This topic provides information on Client Browsers settings.

Recommended Browsers

- **Mozilla Firefox** - Version 91.*
- **Google Chrome** - Version 100.*
- **Apple Safari** - Version 15.*
- **Microsoft Edge** - Version 99.*

Recommended Screen Resolution: 1280*1024 pixels

- [Microsoft Edge Settings](#)
This topic provides information on Microsoft Edge settings.

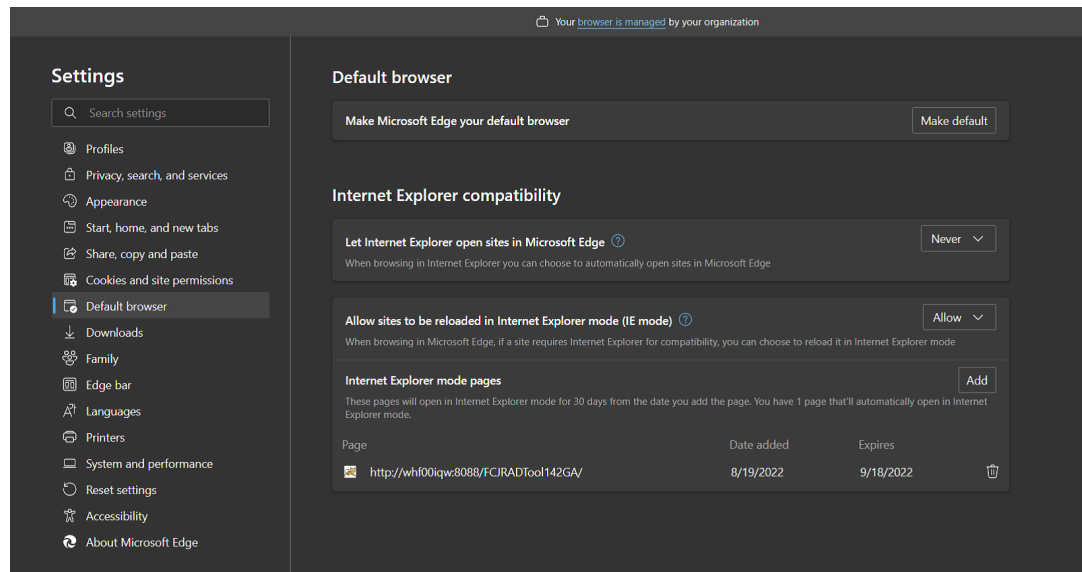
1.2.1 Microsoft Edge Settings

This topic provides information on Microsoft Edge settings.

1. Open **Microsoft Edge**.
2. Navigate to **Settings** and select the **Default Browser** to change the **Internet Explorer compatibility** settings.
3. Select the **Allow** option in the **Allow sites to be reloaded in Internet Explorer mode (IE mode)**.

4. Click **Add** to add the ODT URL in the **Internet Explorer mode pages**.

Figure 1-1 Microsoft Edge Settings



5. Restart the system.

1.3 Log in to Development Workbench

This topic provides the instructions to log in to Development Workbench.

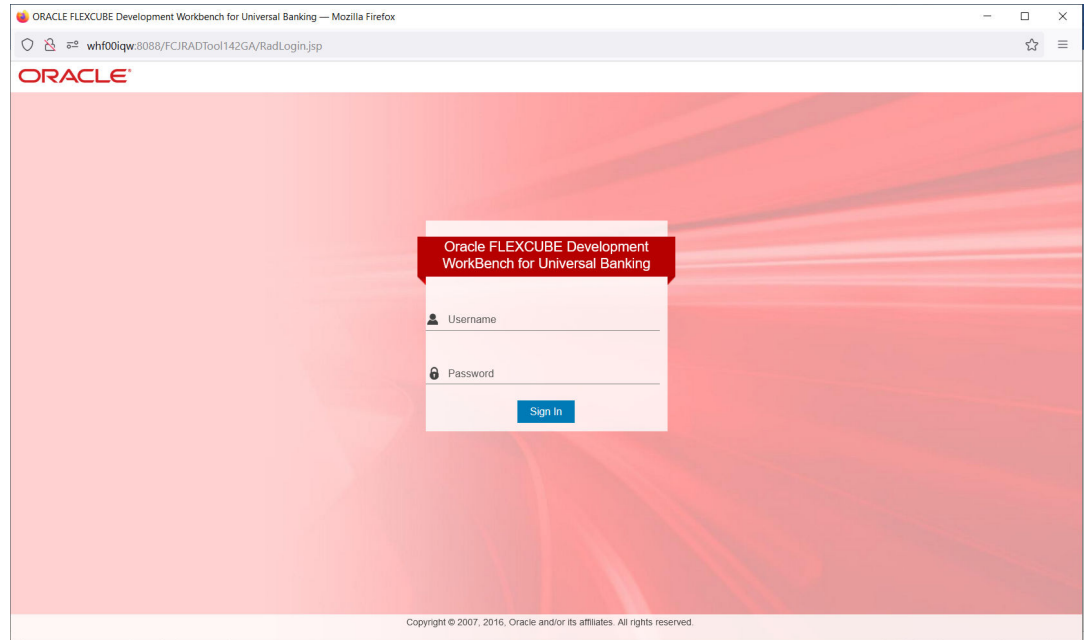
Developers will be provided with login credentials for Workbench that has to use for accessing the Tool. After installation, an initial login credentials will be **RADTOOL/RADTOOL**. By using these credentials, the developer has to create release, environment, and users.

Refer to the topic *Development Workbench - Administration* for further details.

1. Log in to the **Development Workbench for Universal Banking** with initially provided credentials.

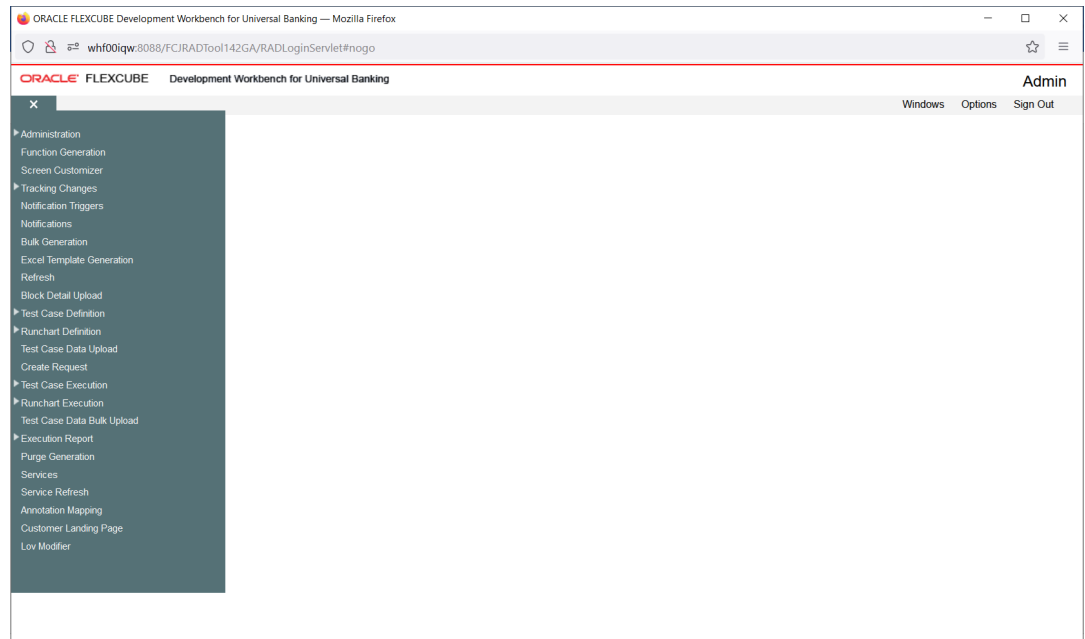
On successful login, the Workbench landing page is displayed. Based on the role, the browser will display the available options to the user in a tree view.

Figure 1-2 Development Workbench for Universal Banking_Login



2. On the **Development Workbench for Universal Banking** landing page, you can view the available options to user in tree view based on the role.

Figure 1-3 Development Workbench for Universal Banking Landing Page



For more information on the Browser tree menu options, refer to the Browser Menu table.

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.
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.

- On the landing page, you can view the other available options.

Figure 1-4 Other Options

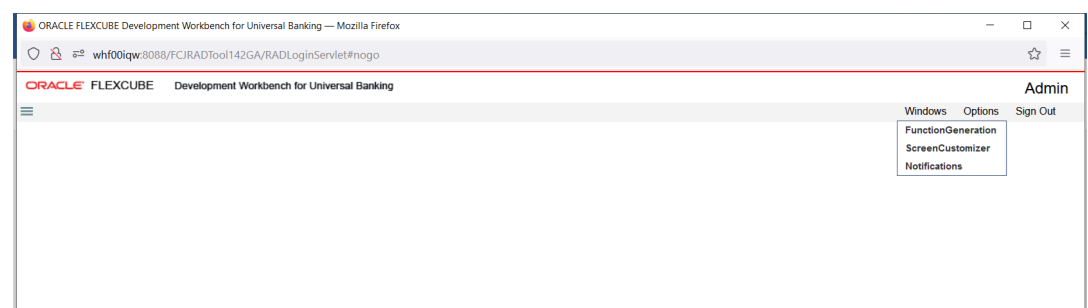


Table 1-3 ORACLE FLEXCUBE Development Workbench - Other options

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 option to log out from the 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: <ul style="list-style-type: none"> • User Preferences • Change Password • Launch FCIS • Accessibility Help • About

1.4 Start FLEXCUBE Development Workbench

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 1-5 Environment Master

The screenshot shows the 'Environment Master' window with the following details:

- Environment Details:**
 - Environment Code: FCIS_145_SUPPORT
 - Release Code: FCIS_145_SUPPORT
 - Language Code: ENG
 - Description: FCIS_145_SUPPORT
 - JNDI name: JNDI Name: jdbc/FCIS_145_SUPPORT
- Application Details:**
 - Application URL: http://10.184.74.143:7755
 - Application IP Address: 10.184.74.143
 - Application Name: FCIS_14.5_SUPP
 - Application OS: Unix
 - Application Transfer Type: File Manager
 - JS Directory Path: /scratch/app/w1032/user/
 - UI XML Directory Path: /scratch/app/w1032/user/
 - Server User Name: server1
 - Server Password:
 - Server Filemanager URL: http://10.184.74.143:7755
 - File Manager User Name:
 - File Manager Password:
- Database Details:**
 - Database Instance: FCIS145SUP
 - Database Port: 1521
 - Database IP Address: 100.76.156.40
 - Database Host Name: FCIS145SUP
 - Database Name: ISSMS145
 - Database Password:
- Footer:**
 - Modification Number: 3
 - Maker Id: RADTOOL
 - Maker Date Stamp: 2022-11-18 18:05:55

Buttons: Close, Test JNDI, Test Environment

1.5 Set up User Preferences

This topic provides the systematic instructions to set up User Preferences.

1. On the **Development Workbench for Universal Banking** landing page, click **Options**.
 2. Select **User Preferences** option from the drop-down menu.
- The **Preferences** screen is displayed.

Figure 1-6 Preferences

Preferences

Release Code: FCIS_145_SUPPORT

Environment Code: FCIS_145_SUPPORT

Language: ENG

Save Mode: Zip

Work Directory:

Excel format: XLS

☐ XML Indentation

Release Details

Release Code: FCIS_145_SUPPORT

Release Type: KERNEL

Environment Details

Environment Description: FCIS_145_SUPPORT

Schema: ISSMS145@FCIS145SUP

Language: English

OK Close

3. On the **Preferences** screen, specify the fields.
- 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.

Table 1-4 (Cont.) Preferences - Field Descriptions

Field	Description
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. Click **OK** after changing the required fields 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.

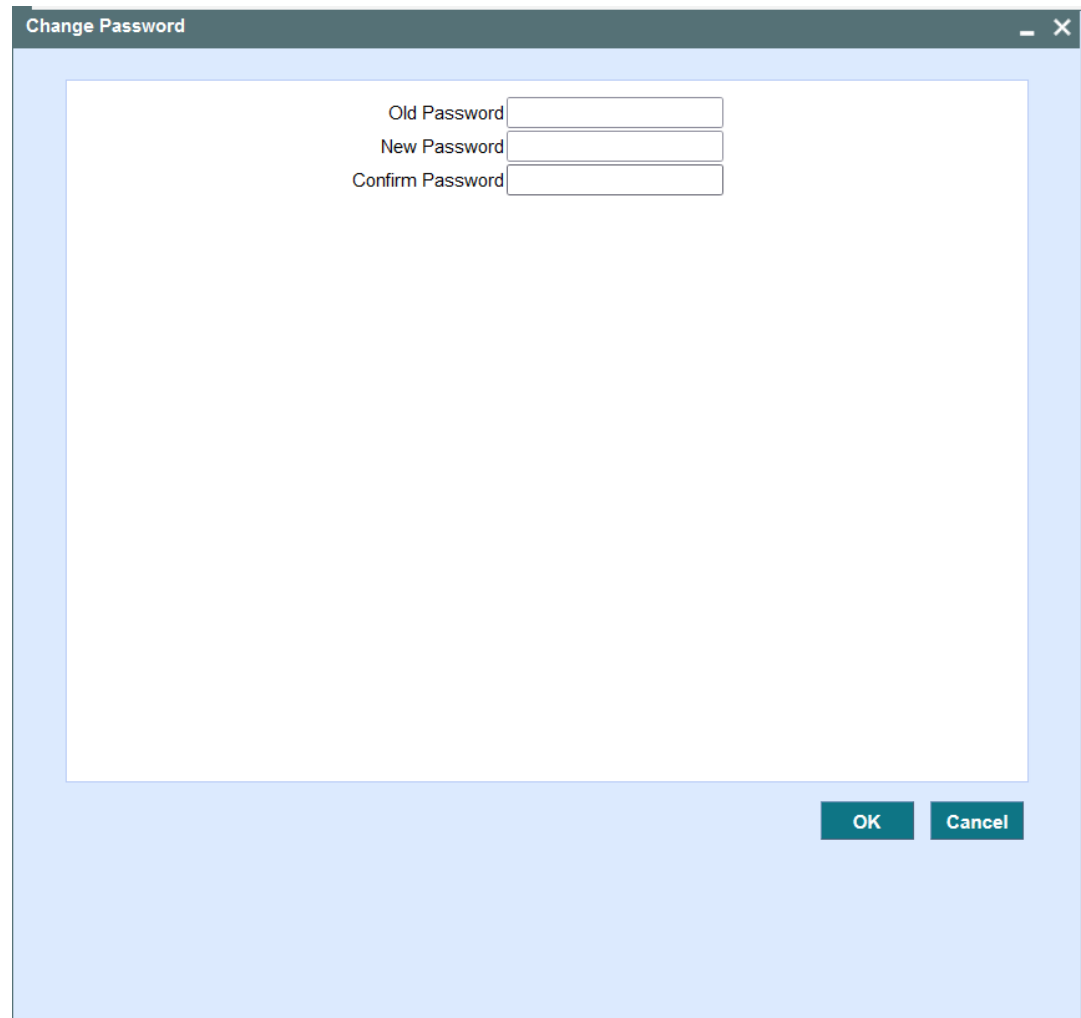
1.6 Change Password

This topic provides the systematic instructions to change the User Password.

1. On **Development Workbench for Universal Banking** landing page, click **Options**.
2. Select **Change Password** option from the drop-down menu.

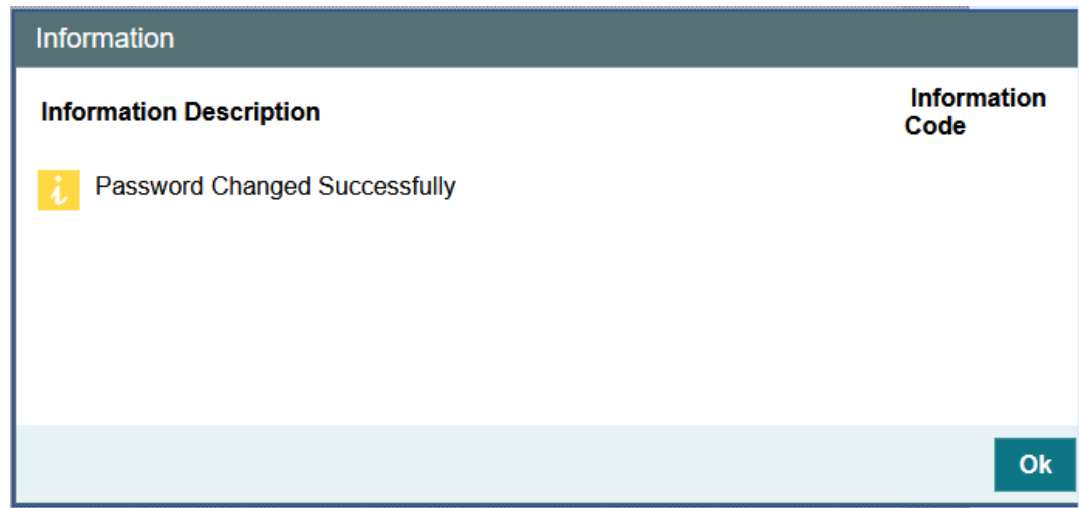
The **Change Password** window is displayed.

Figure 1-7 Change Password

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password' and standard window controls (minimize, maximize, close). The main area contains three text input fields stacked vertically, each with a label to its left: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'.

3. Enter the **Old Password**, **New Password** and **Confirm Password** fields.
4. Click **OK** to change the password.

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

Figure 1-8 Information Message on Password Change

1.7 Sign Out

This topic provides instructions for signing out of FLEXCUBE Development Workbench.

On click of **Sign Out** button, user will be logged out from the FLEXCUBE Development Workbench. All opened windows will get closed automatically. It will redirect to login page.

1.8 About

This topic provides an overview of the About option in the FLEXCUBE Development Workbench.

On click of this, Development Workbench version information popup window will get displayed.

Figure 1-9 Development Workbench_About

