

# Oracle® FLEXCUBE Investor Servicing Development of Dashboard Form



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ORACLE®

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## 1

## Create Dashboard Form

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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  |
|---|--|
| <b>FLEXCUBE Functional Architecture</b>   | Training programs from Oracle Financial Software Services. |
| <b>FLEXCUBE Technical Architecture</b>    | Training programs from Oracle Financial Software Services. |
| <b>FLEXCUBE Object Naming Conventions</b> | 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  |
|-----------------|--|
| <b>boldface</b> | 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 - Getting Started*
- *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 Online Form*
- *Development of Call Form*
- *Development of Launch Forms and Other Screens*
- *Development of Maintenance Form*
- *Development Workbench Service XML Development*
- *Development Workbench Performance Tuning Enhancements*
- *Development Workbench - Rest Services Development*

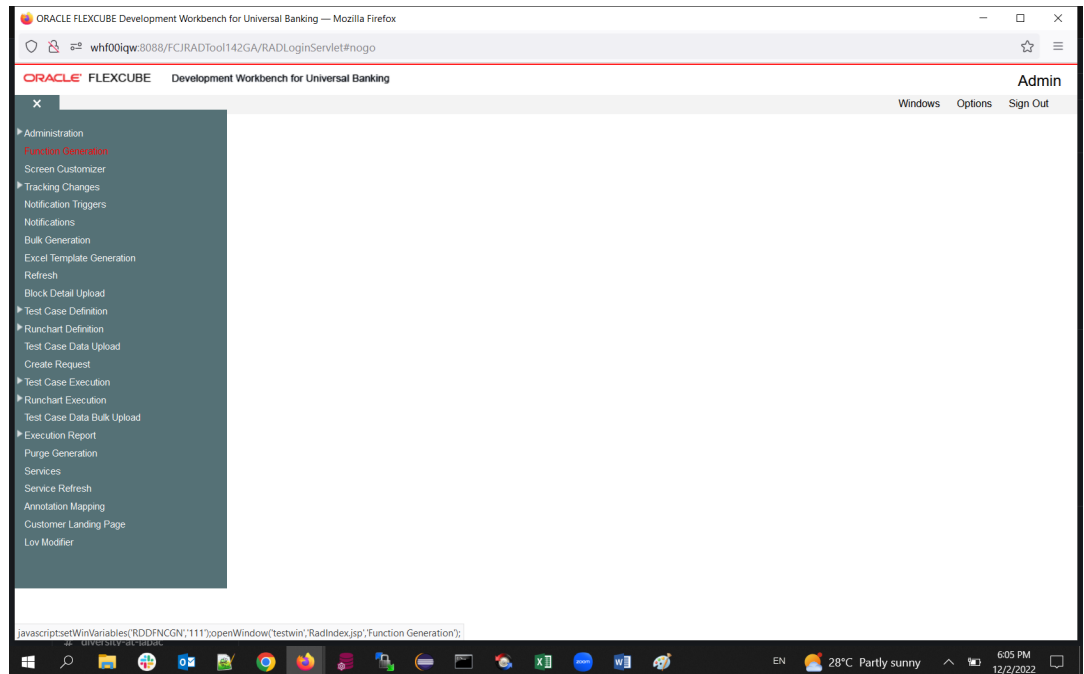
# 1

## Create Dashboard Form

This topic describes the systematic instruction to Create Dashboard Form.

1. Log in to the Development Workbench and click the **Function Generation** node.  
The **Development Workbench for Universal banking** screen is displayed.

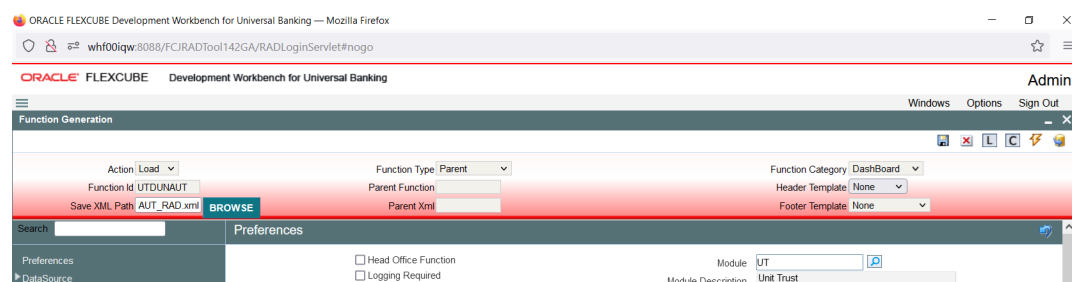
**Figure 1-1 Development Workbench for Universal banking\_Function Generation**



2. On the **Function Generation** screen, specify the following fields in the **Header** section for **Dashboard Forms**.  
For more information on fields, refer to the field description table.

**Table 1-1 Function Generation - Field Description**

| Field                    | Description  |
|--------------------------|--|
| <b>Function ID</b>       | Enter Dashboard Id.<br>It follows the same naming convention as anormal function Id. |
| <b>Action</b>            | Select the Action as <b>New</b> .  |
| <b>Function Category</b> | Select Function Category as <b>DashBoard</b> .                                       |
| <b>Function Type</b>     | Select Function Type as <b>Parent</b> .  |

**Figure 1-2 Function Generation\_Function Category**

- [Preferences](#)  
This topic describes about defining the preferences for Dashboard Forms.
- [Data Sources](#)  
This topic describes about defining the Data Sources for Dashboard Forms.
- [Data Blocks](#)  
This topic describes about defining the Data Blocks for Dashboard Forms.
- [Summary](#)  
This topic describes about the summary dashboards.
- [Generation of units](#)  
This topic describes about the Generation of units.
- [User Maintenance](#)  
This topic provides information on User Maintenance.

## 1.1 Preferences

This topic describes about defining the preferences for Dashboard Forms.

Developer can maintain the menu details in Preferences screen.



Figure 1-3 Function Generation\_Preferences

ORACLE FLEXCUBE Development Workbench for Universal Banking — Mozilla Firefox

whf00lqw:8088/FCIRADTool142GA/RADLoginServlet#nogo

ORACLE FLEXCUBE Development Workbench for Universal Banking

Admin

Windows Options Sign Out

Function Generation

Action: Load

Function Id: UTDUNAUT

Function Type: Parent

Function Category: DashBoard

Save XML Path: AUT\_RAD.xml

Parent Function:

Header Template: None

Footer Template: None

BROWSE

Search:

Preferences

Menu Details

Parameter Value Mappings

Control String

| Function Id                                  | Module | Module Description |
|--|--------|--------------------|
| <input type="checkbox"/> UTDUNAUT            | UT     | Unit Trust         |
| <input checked="" type="checkbox"/> UTSUNAUT | UT     | Unit Trust         |

**Note:**

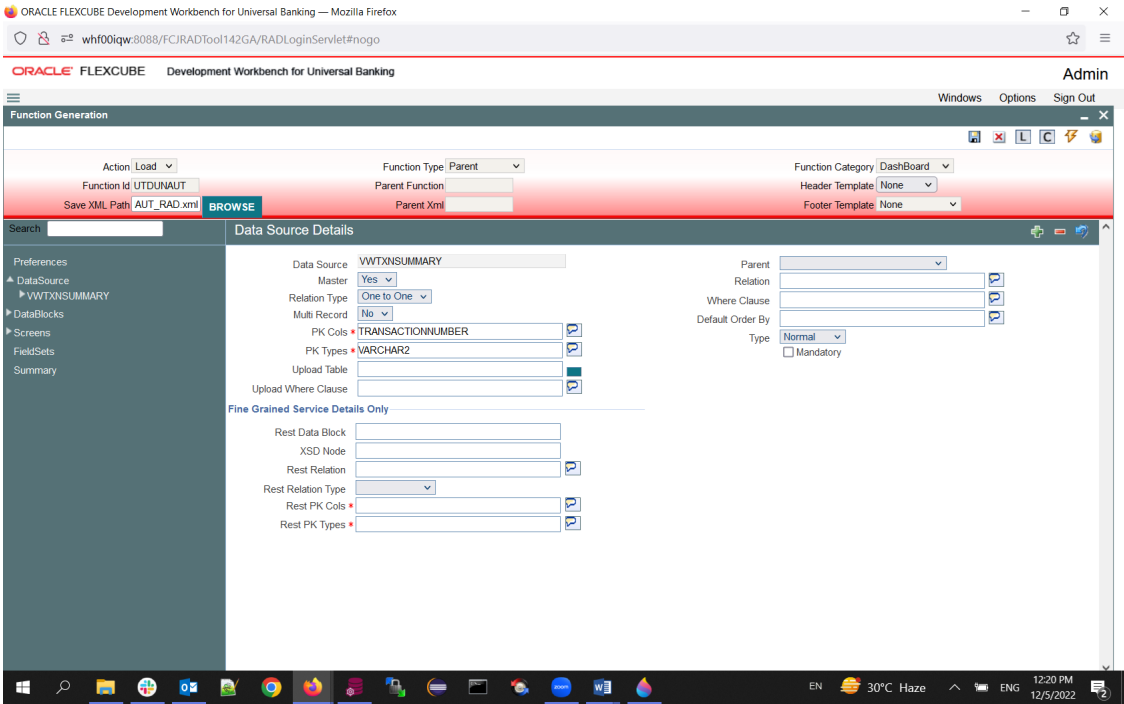
- The **TYPE STRING** will be generated as **D** for dashboard screens in **smtb\_menu**.
- Currently, only summary dashboard screens are supported, so menu details should be maintained exclusively for summary screens.

## 1.2 Data Sources

This topic describes about defining the Data Sources for Dashboard Forms.

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).

Figure 1-4 Data Source Details

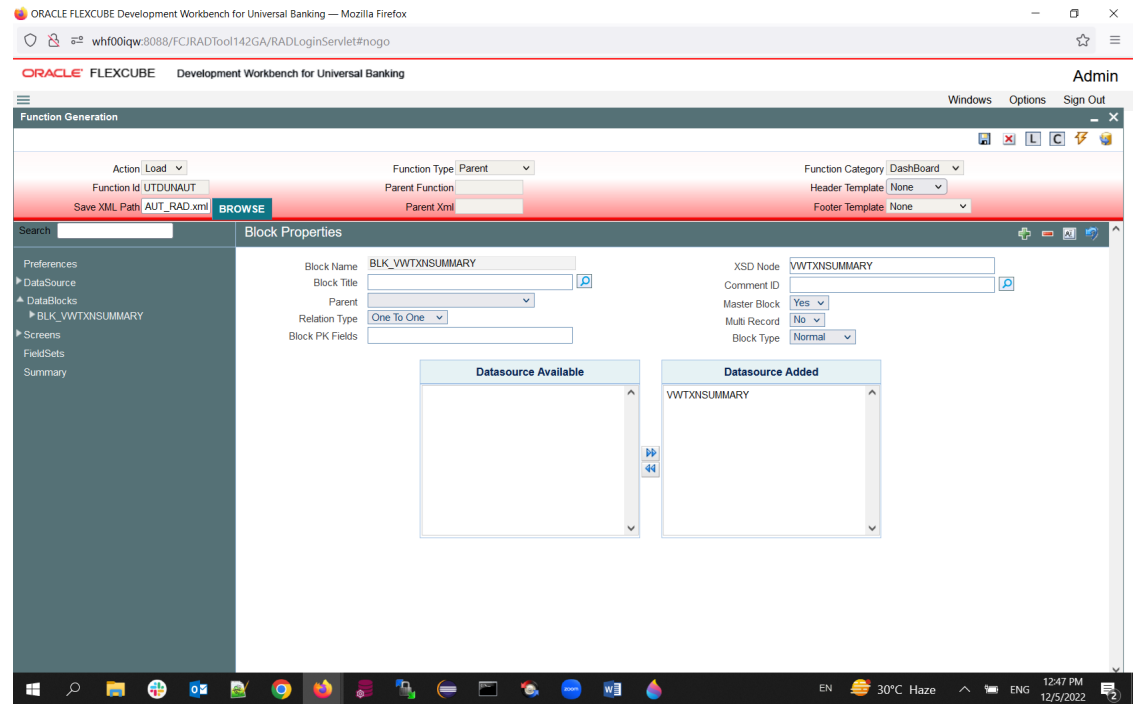


## 1.3 Data Blocks

This topic describes about defining the Data Blocks for Dashboard Forms.

A data block must be created and the data source attached to it. Currently, dashboard screens can only have one data block.

Figure 1-5 Block Properties



## 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 1-6 Block Field Properties

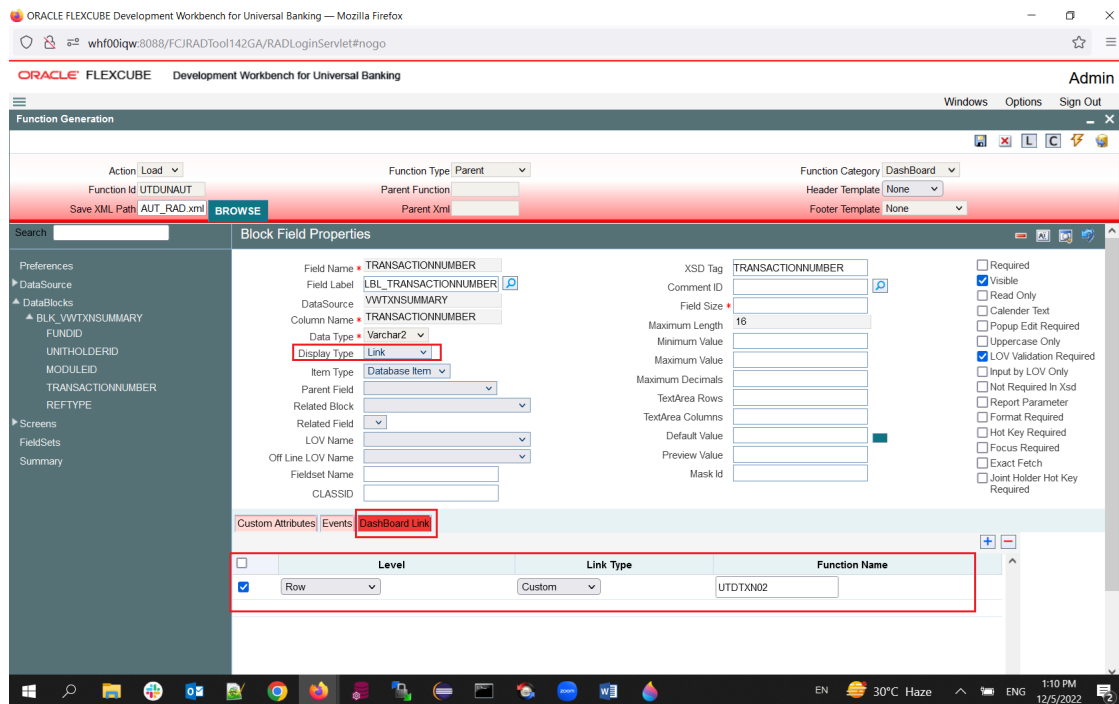


Table 1-2 Block Fields

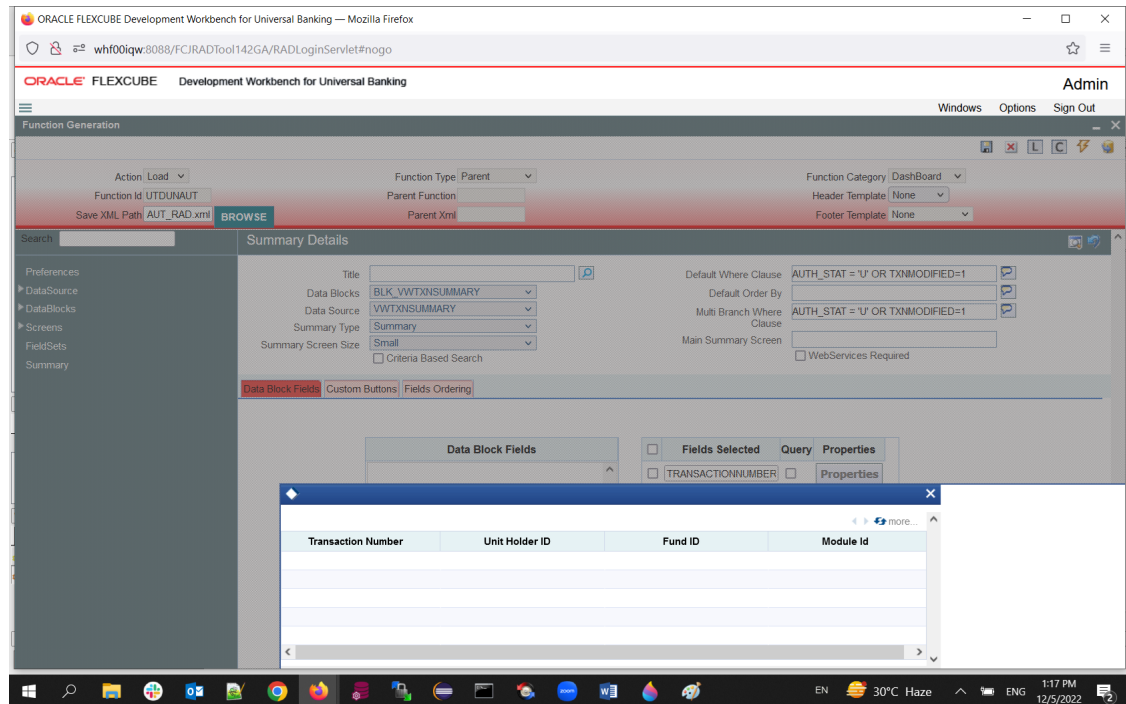
| Field                | Description   |
|----------------------|---|
| <b>Level</b>         | <p>Level can be either Row or Column. If it is column, then the link is limited to that column alone and different links can be provided different fields in the same row. Multiple column level links can be defined for a summary dashboard.</p> <p>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.</p> |
| <b>Link Type</b>     | Link Type can be standard or custom.  |
| <b>Function Name</b> | 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.  |

## 1.4 Summary

This topic describes about the summary dashboards.

The Development Workbench currently supports only summary dashboards.

Figure 1-7 Summary Details



Attach the block to the summary screen, and therefore, do not 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**.
- Do not include any values in **Default Where Clause**. This has to be maintained by the user through user dashboard maintenance screen in FLEXCUBE.
- Attach the fields which are required in the summary screen.

## 1.5 Generation of units

This topic describes about the Generation of units.

The 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

## 1.6 User Maintenance

This topic provides information on User Maintenance.

The user must manage the dashboards available to them in the User Dashboard Maintenance screen in FLEXCUBE. The sequence number of the screens, along with the **Where Clause** for the summary screen, must be provided here.