

# Oracle® FLEXCUBE Investor Servicing Development Workbench - Screen Customizer



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ORACLE®

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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 - Source Upgrade*
- *Development Workbench - Notifications*
- *Development Workbench - Bulk Generation*
- *Development Workbench - Tracking Changes*
- *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*
- *Child and Screen Childs - Concept and Design*

# 1

## 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.

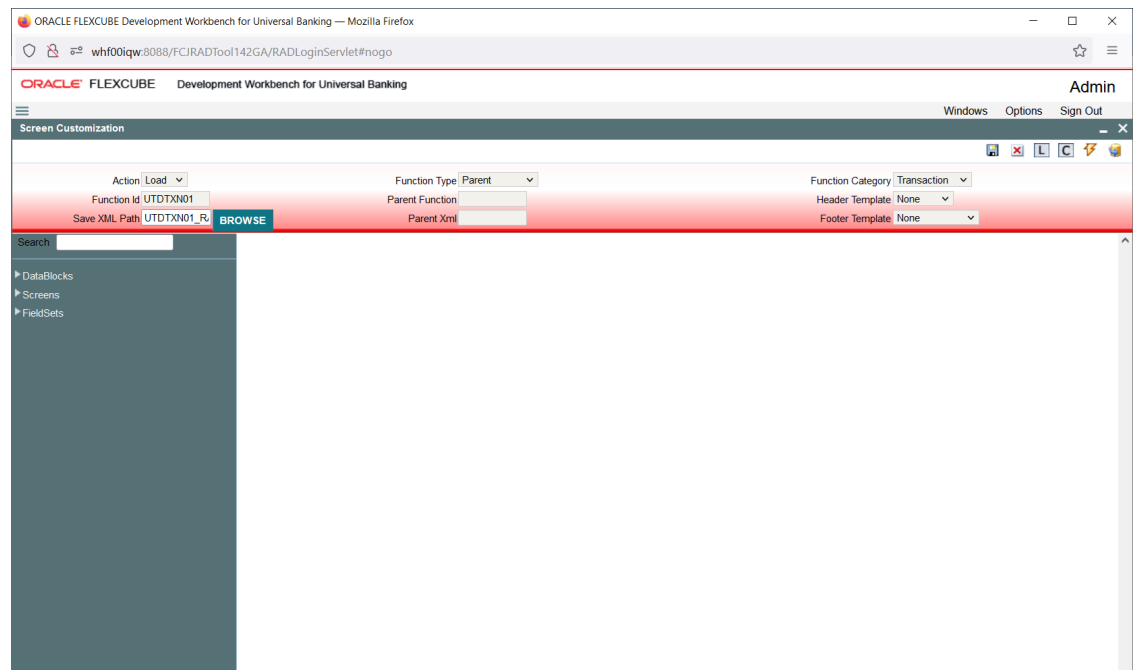


### Note:

Only Load action is possible in Screen Customizer.

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

**Figure 1-1 Screen Customization**



- [DataBlocks](#)  
This topic describes about data blocks in Screen Customizer.
- [Screens](#)  
This topic describes about screens in Screen Customizer.

- [FieldSets](#)  
This topic describes about FieldSets in Screen Customizer.

## 1.1 DataBlocks

This topic describes about data blocks in Screen Customizer.

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 1-2 Screen Customization\_DataBlocks**

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

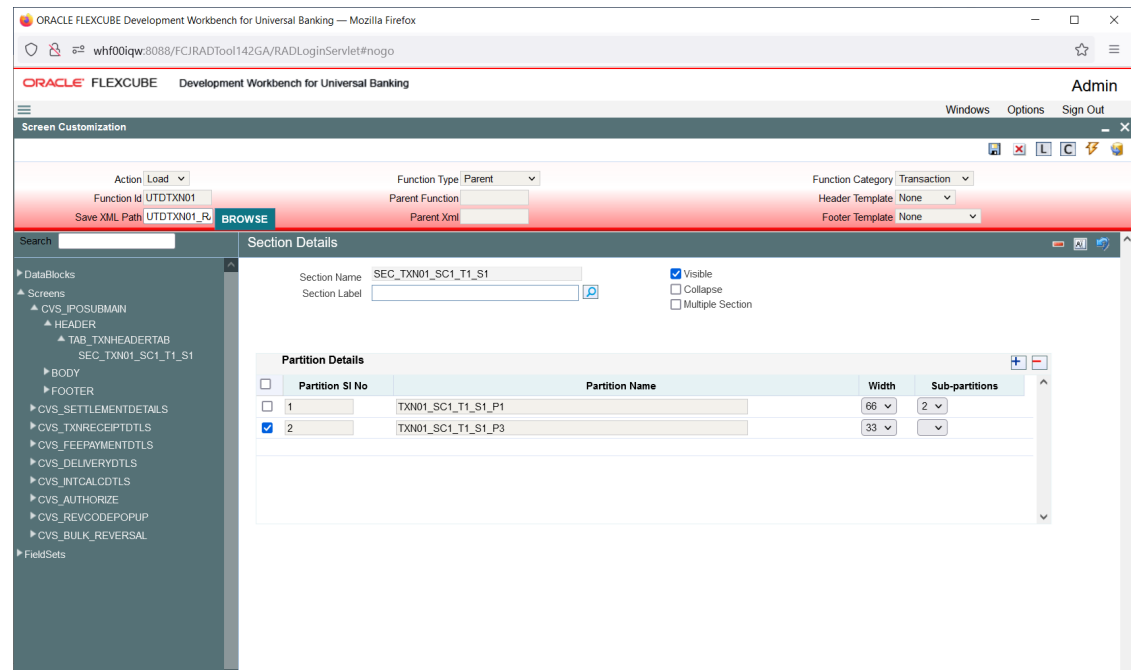
## 1.2 Screens

This topic describes about screens in Screen Customizer.



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.

**Figure 1-3 Screen Customization\_Screens**



## 1.3 FieldSets

This topic describes about FieldSets in Screen Customizer.

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

Figure 1-4 Screen Customization\_Fieldsets

The screenshot displays the Oracle Flexcube Development Workbench for Universal Banking. The interface is titled "Screen Customization" and includes a search bar, a list of fieldsets on the left, and a "Fieldset Properties" panel on the right. The "Fieldset Properties" panel shows details for the fieldset "FST\_TRANSACTION\_VALUE".

**Fieldset Properties:**

- Fieldset Name: FST\_TRANSACTION\_VALUE
- Fieldset Label: LBL\_TRANSACTIONVALUE
- Data Block: BLK\_TRANSACTION\_DETAILS
- Multi Record: No
- View Type: Single
- Fieldset Height: (empty)
- Number Of Rows: (empty)
- Fieldset Type: Normal
- Screen Name: CVS\_IPOSUBMAIN
- Screen Portion: Header
- Tab Name: TAB\_TXNHADERTAB
- Section Name: SEC\_TXN01\_SC1\_T1\_S1
- Partition Name: TXN01\_SC1\_T1\_S1\_P3

**Data Block Fields:**

Fieldset Fields	Subpartition Name
<input type="checkbox"/> TRANSACTION_MODE	
<input type="checkbox"/> UNITSAPPLIED	
<input type="checkbox"/> TRANSACTIONCURRENCYAMOUN	
<input type="checkbox"/> PERCENTAPPLIED	
<input type="checkbox"/> BTNENRICH	
<input type="checkbox"/> BTN_RESET	
<input checked="" type="checkbox"/> RESETFLAG	

## 2

# Generated Units

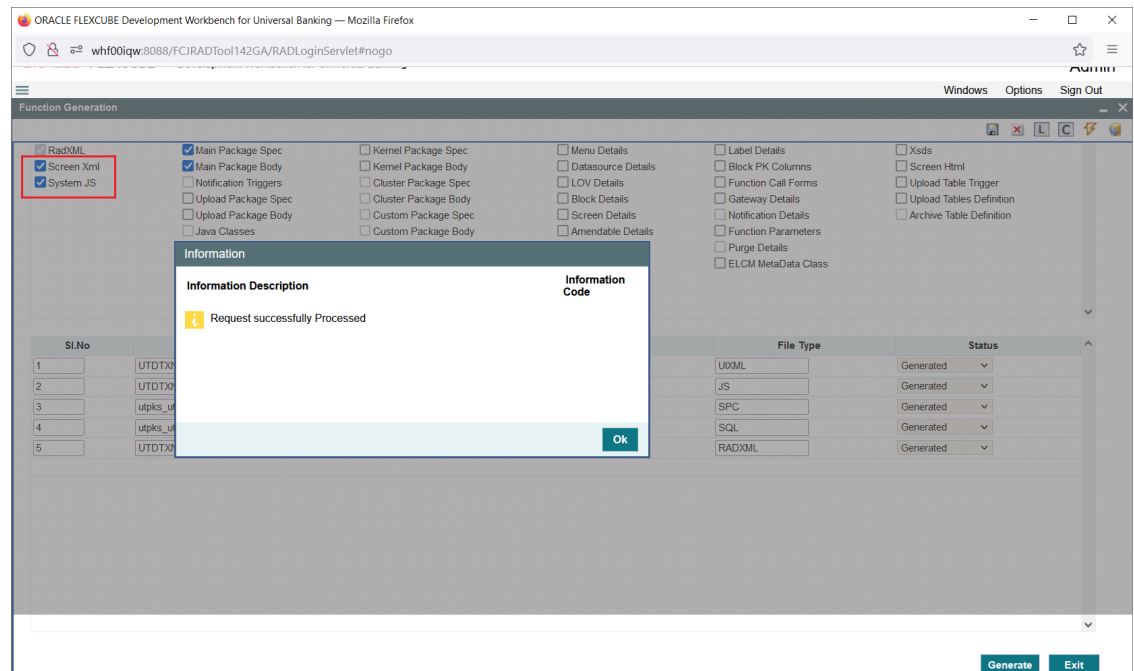
This topic describes the UI related generated units in the Screen Customizer.

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 2-1 Generation of files in Screen Customizer**



# 3

## Examples

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 3-1 Preview with the Transaction Category field displayed**

The screenshot displays a web application interface for managing transactions. The top navigation bar includes 'New' and 'Enter Query' buttons. The main content area is divided into two sections: 'Transaction Information' and 'Transaction Value'. The 'Transaction Information' section contains fields for Unit Holder ID, Fund ID, Order Received Date, Order Received Time Zone, Transaction Date, Payment Mode, and Payment Mode Description. The 'Transaction Value' section includes Transaction Number, Transaction Currency, Reference Number, Order Received Time (HH24:MI), Transaction Type, Description, Transaction Mode, Units Applied, Amount Applied, and Percent Applied. A red box highlights the 'Transaction Category' field in the 'Transaction Information' section. Below the main content area, there is a tabbed interface with tabs for 'UH And Fund', 'Transaction', 'Other', 'Intermediary', 'Load Override', 'KYC And Document', 'Add Info', 'Fee Payment', 'Certificate', and 'Limit Order'. The 'UH And Fund' tab is currently selected. The bottom of the screen features a footer with input fields for 'Input By', 'Authorized By', 'DateTime', 'Mod No', 'Authorization Status', and 'Record Status', along with 'Ok' and 'Exit' buttons.

If **Transaction Category** field is not required, uncheck the **Visible** flag.

Figure 3-2 Block Field Properties\_Uncheck Visible

ORACLE FLEXCUBE Development Workbench for Universal Banking — Mozilla Firefox

whf001qw:8088/FC/RADTool142GA/RADLoginServlet#nogo

ORACLE FLEXCUBE Development Workbench for Universal Banking

Admin

Screen Customization

Action: Load

Function Id: UTDTXN01

Save XML Path: D:\01\_RAD.xml

BROWSE

Function Type: Parent

Parent Function:

Parent Xml:

Function Category: Transaction

Header Template: None

Footer Template: None

Search: TXNCATEGORY

Block Field Properties

Field Name: TXNCATEGORY

Field Label: LBL\_TXNCATEGORY

Data Source: CONSOLIDATEDTXNTBL

Column Name: TXNCATEGORY

Data Type: Varchar2

Display Type: Lov

Item Type: Database Item

Parent Field:

Related Block:

Related Field:

LOV Name: LOV\_TXNCAT

Off Line LOV Name:

Fieldset Name: FST\_TRANSACTION\_INFO

CLASSID:

XSD Tag: TXNCATEGORY

Comment ID: CMT\_TXNCATEGORY

Field Size: 1

Maximum Length:

Minimum Value:

Maximum Value:

Maximum Decimals:

TextArea Rows:

TextArea Columns:

Default Value:

Preview Value:

Mask Id:

Required: ☐

Visible: ☐

Read Only: ☐

Calendar Text: ☐

Popup Edit Required: ☐

Uppercase Only: ☐

LOV Validation Required: ☒

Input by LOV Only: ☐

Not Required In Xsd: ☐

Report Parameter: ☐

Format Required: ☐

Hot Key Required: ☐

Focus Required: ☐

Exact Fetch: ☐

Joint Holder Hot Key Required: ☐

Custom Attributes

Attribute Name	Attribute Value	Active	Move Up	Move Down
<input type="checkbox"/> LBL_SELECT1		Yes	▲	▼
<input type="checkbox"/> LBL_LEGACY	L	Yes	▲	▼
<input type="checkbox"/> LBL_ADVISED	A	Yes	▲	▼
<input checked="" type="checkbox"/> LBL_EXECUTIONONLY	E	Yes	▲	▼

Figure 3-3 A preview with the Transaction Category field hidden

New Enter Query

Transaction Information

Unit Holder ID \*

Fund ID \*

Order Received Date

Order Received Time Zone

Transaction Date \*

Payment Mode \*

Payment Mode Description

Transaction Number

Transaction Currency

Reference Number

Order Received Time (HH24.MI)

Transaction Type

Description

Transaction Value

Transaction Mode \*

Amount

Units Applied

Amount Applied

Percent Applied

Enrich Transaction

Reset Transaction

UH And Fund

Transaction

Other

Intermediary

Load Override

KYC And Document

Add Info

Fee Payment

Certificate

Limit Order

CIF Number

Unit Holder Name

ISIN No

Fund Name

Fund Base Currency

Price Currency

Currency of Expression

Settlement Details

Receipt Details

Project Allocation Details

Allocation Details

View Balance

Input By

Authorized By

DateTime

DateTime

Mod No

Authorization Status Unauthorized

Record Status Open

Ok

Exit

## Example 2

Requirement: Adding a new Tab to the screen and move fields from one tab to another.

As shown in the screenshot below, the Main Tab contains the Unique Identifier Fieldset, which needs to be moved to a new tab.

Figure 3-4 Fields in UH and Fund Tab

The screenshot displays the 'Transaction Information' form in Oracle Flexcube. The form is divided into two main sections: 'Transaction Information' and 'Transaction Value'. The 'Transaction Information' section includes fields for Unit Holder ID, Fund ID, Order Received Date, Order Received Time Zone, Transaction Date, Payment Mode, Payment Mode Description, Transaction Number, Transaction Currency, Reference Number, Order Received Time (HH24:MI), Transaction Type, Description, and Transaction Category. The 'Transaction Value' section includes fields for Transaction Mode, Units Applied, Amount Applied, and Percent Applied. Below these sections, there are tabs for 'UH And Fund', 'Transaction', 'Other', 'Intermediary', 'Load Override', 'KYC And Document', 'Add Info', 'Fee Payment', 'Certificate', and 'Limit Order'. The 'UH And Fund' tab is currently selected, showing fields for CIF Number, Unit Holder Name, ISIN No, Fund Name, Fund Base Currency, and Price Currency. The 'ISIN No' and 'Fund Name' fields are highlighted with a red box. At the bottom of the form, there are buttons for 'Settlement Details', 'Receipt Details', 'Project Allocation Details', 'Allocation Details', and 'View Balance'. The 'Input By' and 'Authorized By' fields are also present, along with a 'Mod No' field and a dropdown for 'Authorization Status' (set to 'Unauthorized'). The 'Record Status' is set to 'Open'. The form has 'Ok' and 'Exit' buttons at the bottom right.

In Screen Customizer, the developer can add a new tab and modify the properties of the field set, such as attaching it to the newly created tab.

Figure 3-5 New Tab Created\_Details

The screenshot shows the Oracle Flexcube Development Workbench for Universal Banking. The main window displays the 'Transaction Information' form, which is the same as in Figure 3-4. However, a new tab labeled 'Details' has been added to the tab bar, highlighted with a red box. The 'Details' tab is currently selected, showing fields for ISIN No and Fund Name, which are also highlighted with a red box. The left sidebar shows the 'Function Generation' pane with a tree view of the application structure. The 'TAB\_NEW\_SEC\_1' tab is highlighted in the tree view. The top of the window shows the 'ORACLE FLEXCUBE' logo and the 'Development Workbench for Universal Banking' title. The bottom of the window shows the 'Input By' and 'Authorized By' fields, the 'Mod No' field, and the 'Authorization Status' dropdown (set to 'Unauthorized'). The 'Record Status' is set to 'Open'. The form has 'Ok' and 'Exit' buttons at the bottom right.