

Oracle® FLEXCUBE Investor Servicing Development of Dashboard Form



Release 14.8.0.0.0

G32136-02

April 2025

ORACLE®

Copyright © 2007, 2025, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Purpose	i
Audience	i
Documentation Accessibility	ii
Critical Patches	ii
Diversity and Inclusion	ii
Conventions	ii
Screenshot Disclaimer	iii
Prerequisite	iii
Related Resources	iii

1 Create Dashboard Form

1.1	Preferences	2
1.2	Data Sources	3
1.3	Data Blocks	4
1.4	Summary	6
1.5	Generation of units	7
1.6	User Maintenance	8

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 - 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*

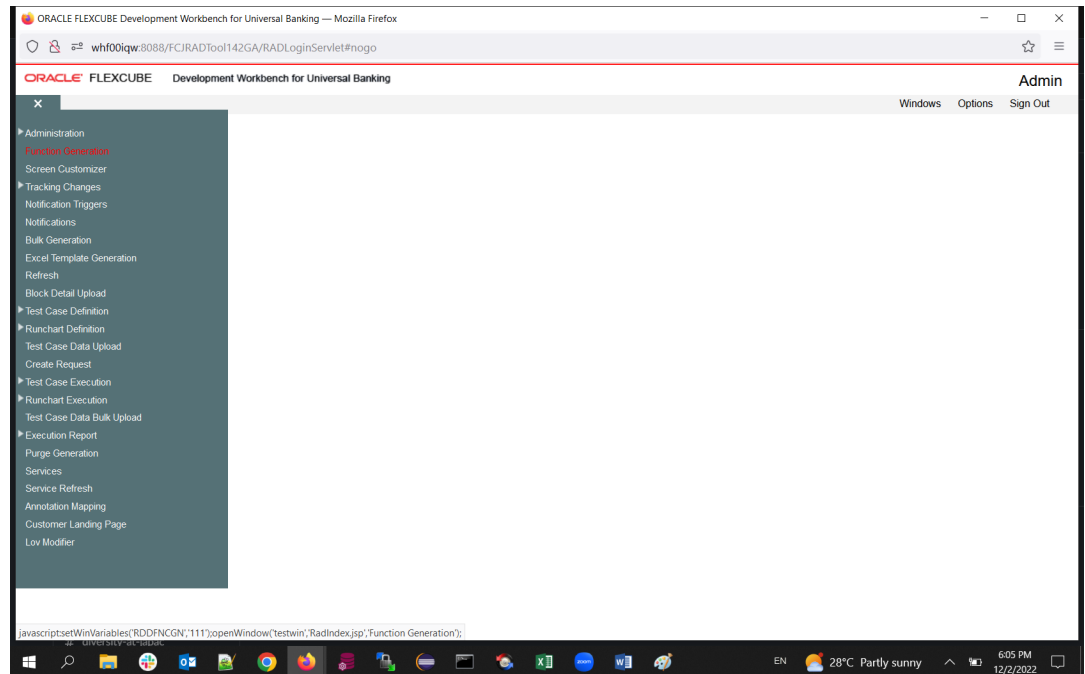
1

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.

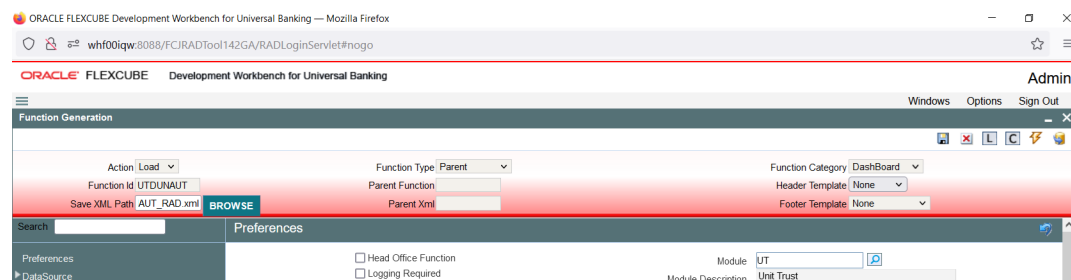
Figure 1-1 Development Workbench for Universal banking_Function Generation



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
Function ID	Enter Dashboard Id. It follows the same naming convention as anormal function Id.
Action	Select the Action as New .
Function Category	Select Function Category as DashBoard .
Function Type	Select Function Type as Parent .

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

whf001qw: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

Search:

Preferences

Menu Details

Parameter Value Mappings

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

The screenshot displays the Oracle FLEXCUBE Development Workbench for Universal Banking interface. The main window is titled "Data Source Details" and contains the following configuration fields:

- Action:** Load
- Function Id:** UTDUNAUT
- Save XML Path:** AUT_RAD.xml
- Function Type:** Parent
- Parent Function:** (empty)
- Parent Xml:** (empty)
- Function Category:** Dashboard
- Header Template:** None
- Footer Template:** None

The left sidebar shows a navigation menu with the following items:

- Preferences
- Data Source
- WVTXNSUMMARY
- Data Blocks
- Screens
- Field Sets
- Summary

The main configuration area includes the following fields:

- Data Source:** WVTXNSUMMARY
- Master:** Yes
- Relation Type:** One to One
- Multi Record:** No
- PK Cols:** TRANSACTIONNUMBER
- PK Types:** VARCHAR2
- Upload Table:** (empty)
- Upload Where Clause:** (empty)
- Parent:** (empty)
- Relation:** (empty)
- Where Clause:** (empty)
- Default Order By:** (empty)
- Type:** Normal
- Mandatory:** (unchecked)

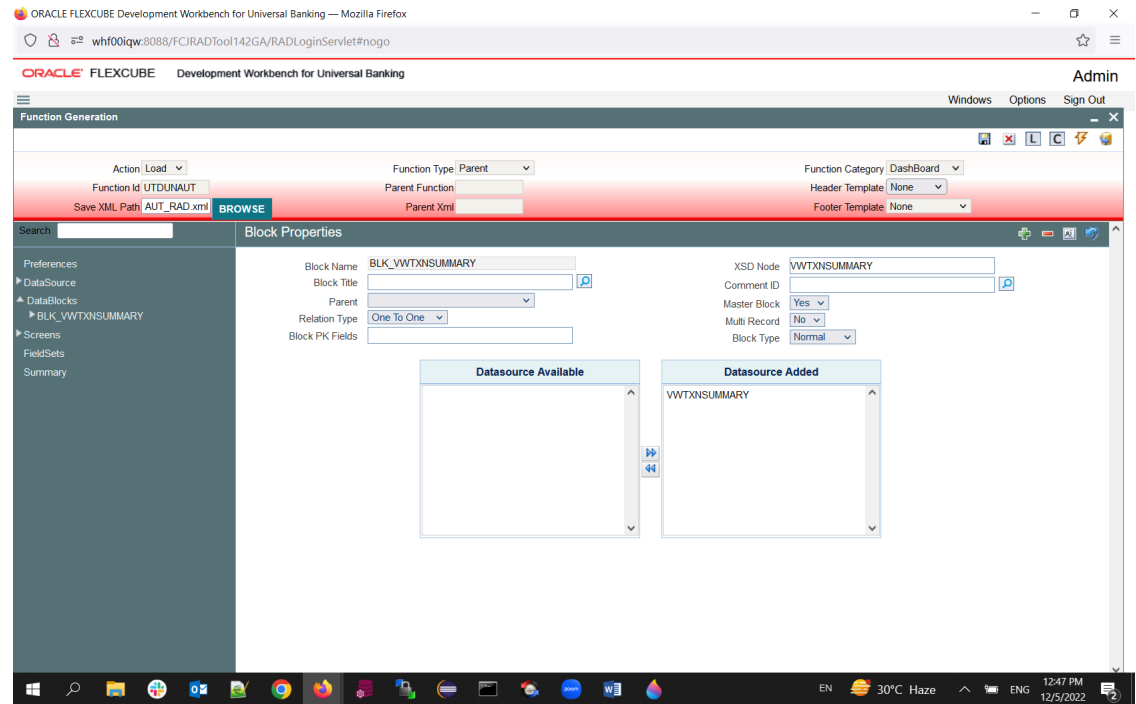
Below the main configuration area, there is a section titled "Fine Grained Service Details Only" with the following fields:

- Rest Data Block:** (empty)
- XSD Node:** (empty)
- Rest Relation:** (empty)
- Rest Relation Type:** (empty)
- Rest PK Cols:** (empty)
- Rest PK Types:** (empty)

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

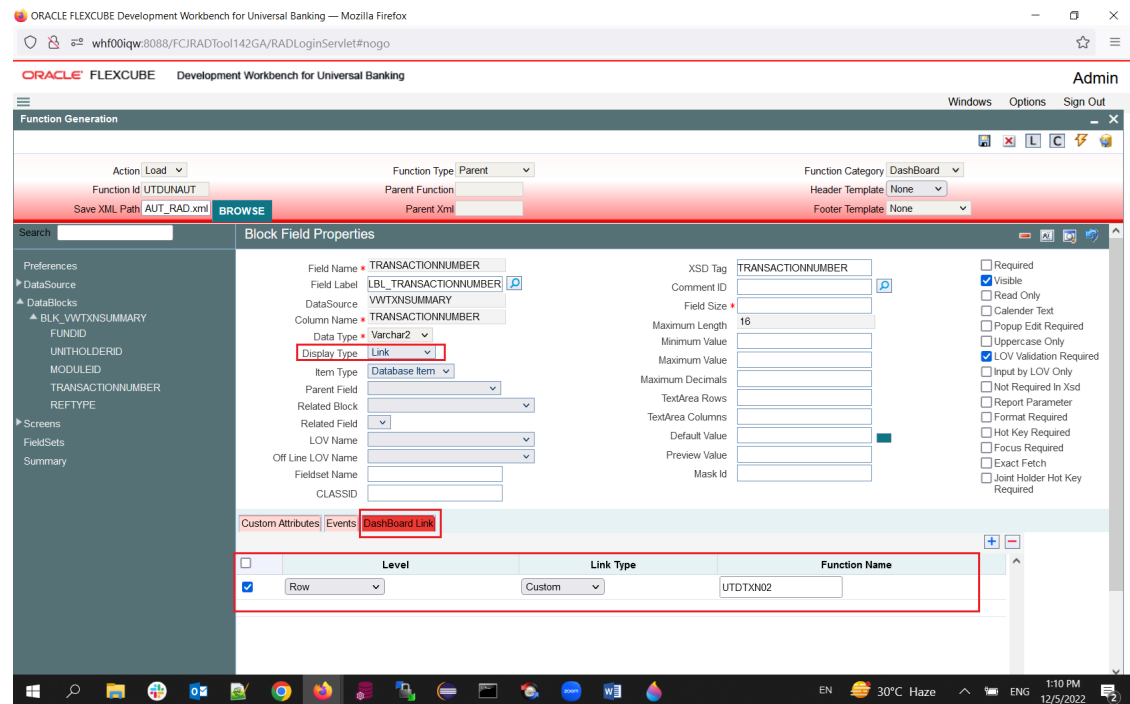


Table 1-2 Block Fields

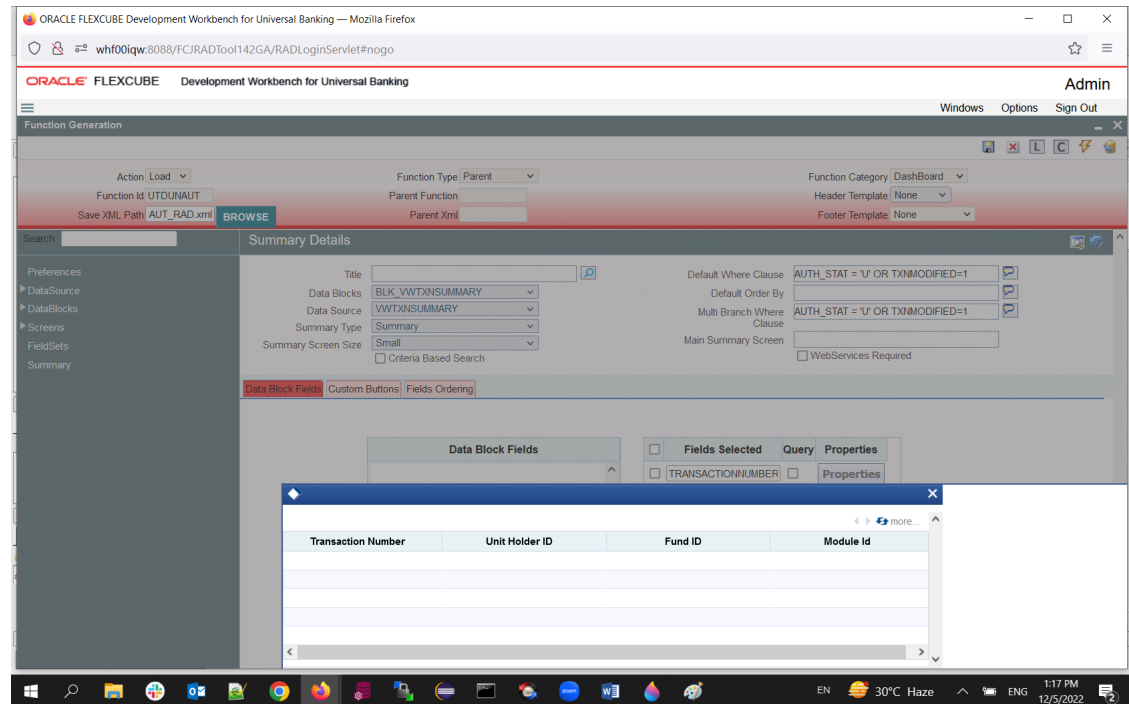
Field	Description
Level	<p>Level can be either Row or Column. If it is column, then the link is limited to that column alone and different links can be provided different fields in the same row. Multiple column level links can be defined for a summary dashboard.</p> <p>If it is row, the link is the same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