

Oracle® FLEXCUBE Investor Servicing Development Workbench - Screen Customizer



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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>.

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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 - 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.

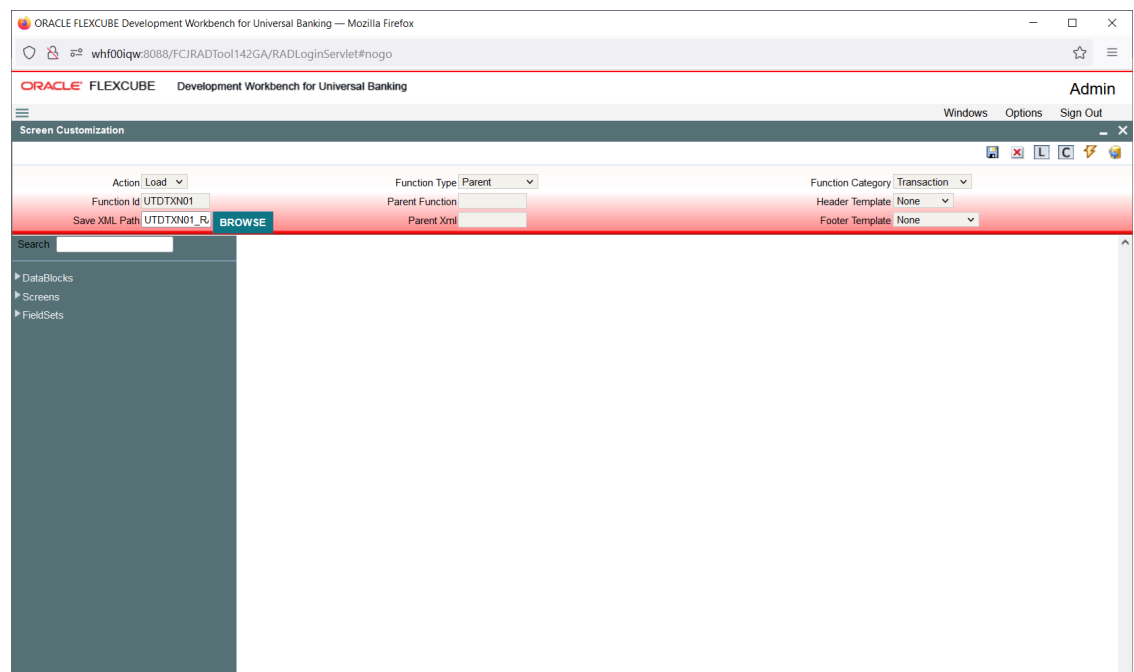
Only the screen layout changes and UI field properties will be allowed to change in the Screen Customizer.

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 screenshot displays the Oracle Flexcube Development Workbench for Universal Banking. The main window is titled "Screen Customization" and shows a list of DataBlocks on the left. The selected DataBlock is "FUNID". The right panel, "Block Field Properties", shows the following details:

- Field Name:** FUNID
- Field Label:** LBL_FUNID
- DataSource:** CONSOLIDATEDTXNTBL
- Column Name:** FUNID
- Data Type:** Varchar2
- Display Type:** Low
- Item Type:** Database Item
- Parent Field:** (empty)
- Related Block:** (empty)
- Related Field:** (empty)
- LOV Name:** LOV_FUNID
- Off Line LOV Name:** (empty)
- Fieldset Name:** FST_TRANSACTION_INFO
- CLASSID:** (empty)

The "Custom Attributes" section is active, showing a table with the following columns: Attribute Name, Attribute Value, Active, Move Up, and Move Down. The table is currently empty.

The user will be allowed to change the below properties at the data block field level.

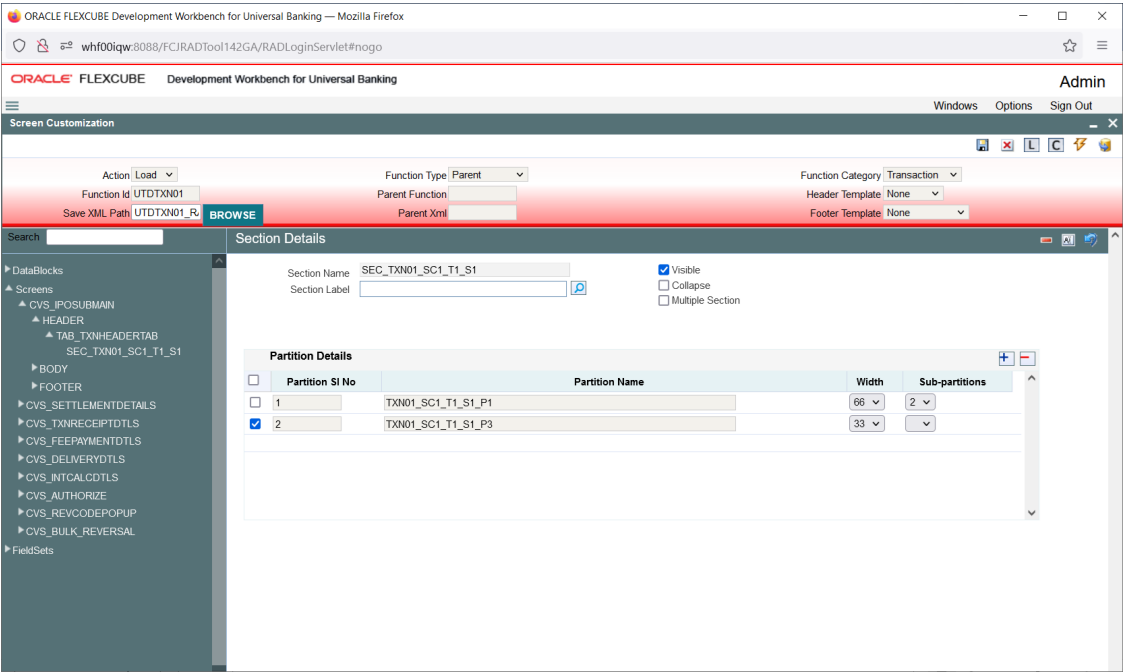
- Display Type
- Field Size
- Preview Value
- Popup Edit Required
- Visible
- Upper Case only
- Read Only

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

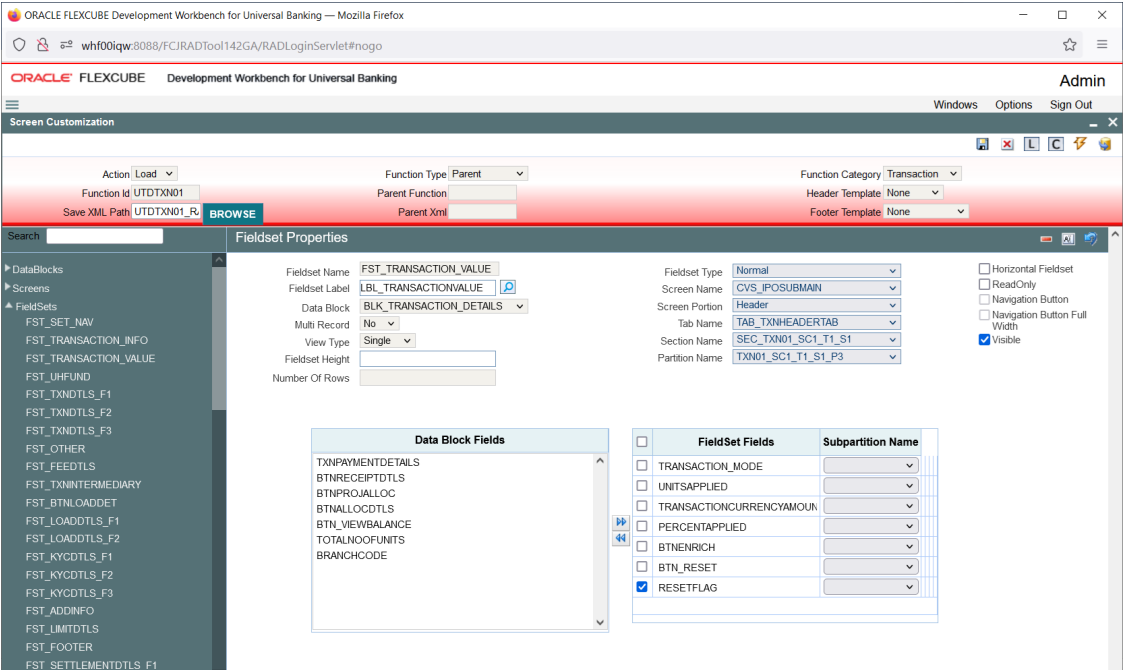


1.3 FieldSets

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



2

Generated Units

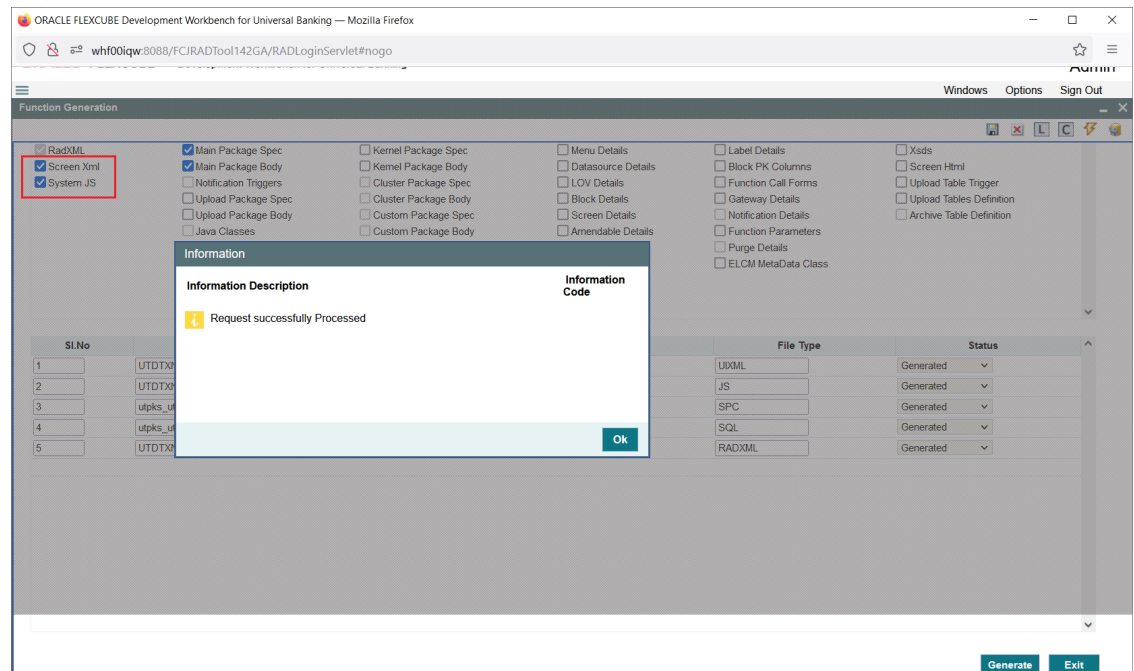
This topic describes the UI related generated units in the Screen Customizer.

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-based transaction entry form. The form is divided into several sections: 'Transaction Information' on the left, 'Transaction Value' on the right, and a central area for transaction details. The 'Transaction Information' section includes 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 fields for Transaction Number, Transaction Currency, Reference Number, Order Received Time (HH24:MI), Transaction Type, Description, Transaction Mode, Units Applied, Amount Applied, and Percent Applied. The central area includes fields for CIF Number, Unit Holder Name, ISIN No, Fund Name, Fund Base Currency, Price Currency, and Currency of Expression. The 'Transaction Category' field is highlighted with a red box. Below the form, there are tabs for 'Settlement Details', 'Receipt Details', 'Project Allocation Details', 'Allocation Details', and 'View Balance'. At the bottom, there are 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 Function Category: Transaction Header Template: None Footer Template: None

Search: TXNCATEGORY

Block Field Properties

Field Name: TXNCATEGORY XSD Tag: TXNCATEGORY
 Field Label: LBL_TXNCATEGORY Comment ID: CMT_TXNCATEGORY
 DataSource: CONSOLIDATEDTXNTBL Field Size: 1
 Column Name: TXNCATEGORY Maximum Length: Minimum Value: Maximum Value: Minimum Decimals: Text Area Rows: Text Area 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

Data Type: Varchar2 Display Type: Lov Item Type: Database Item Parent Field: Related Block: Related Field: LOV_TXNCAT Off Line LOV Name: Fieldset Name: FST_TRANSACTION_INFO CLASSID: ☐ Custom Attributes ☐ Events ☐ Bind Variables ☐ Return Fields ☐ Off Line Bind Variables ☐ Off Line Return Fields ☐ Dashboard Link ☐ Related Field ☐ Patterns

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 UH Deal UH Signature

ISIN No Fund Name Fund Base Currency Price Currency Currency of Expression No

Settlement Details Receipt Details Project Allocation Details Allocation Details View Balance

Input By Authorized By Date Time Date Time 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 shows the 'UH And Fund' tab in the Oracle Flexcube Development Workbench. The tab 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, Transaction Category, and Description. The 'Transaction Value' section includes fields for Transaction Mode, Units Applied, Amount Applied, and Percent Applied. Below these sections are fields for CIF Number, Unit Holder Name, ISIN No, Fund Name, Fund Base Currency, and Price Currency. The 'Details' tab is highlighted in the bottom navigation bar.

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 'Details' tab in the Oracle Flexcube Development Workbench. The tab 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, Transaction Category, and Description. The 'Transaction Value' section includes fields for Transaction Mode, Units Applied, Amount Applied, and Percent Applied. Below these sections are fields for CIF Number, Unit Holder Name, ISIN No, Fund Name, Fund Base Currency, and Price Currency. The 'Details' tab is highlighted in the bottom navigation bar.