Development of Dashboard Forms Oracle Banking Corporate Lending Release 14.7.1.0.0 Part No. F79326-01 [July] [2023]

FINANCIAL SERVICES

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### 1 Preface

This document describes Dashboard Forms available in Oracle FLEXCUBE and guides the developers in designing a Dashboard screen using Oracle FLEXCUBE Development Workbench for Universal Banking

### 1.1 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:

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
FLEXCUBE Screen Development	Oracle FLEXCUBE Enterprise Limits and
PLEACO DE Screen Development	Collateral Management ODT Screen
Marking knowledge of Mah based	<u>Development</u>
Working knowledge of Web based applications	Self Acquired
applications	
Working knowledge of Oracle Database	Oracle Documentations
0	
Marking Improved and a of DI COL & COL	Colf A agreeing d
Working knowledge of PLSQL & SQL	Self Acquired
Language	
Working knowledge of XML files	Self Acquired

#### 1.2 Related Documents

Oracle FLEXCUBE Enterprise Limits and Collateral Management ODT Screen Development Development Workbench - Screen Development II

# 2 Introduction

This document provides information on:

- <u>Chapter 2 , "Introduction"</u>
- Chapter 3, "Creating Dashboard Form"
- Chapter 4, "Generation of Units"
- <u>Chapter 5 , "User Maintenance</u>"

# 3 Creating Dashboard Form

Log into the Development Workbench and click on *Function Generation* tab.

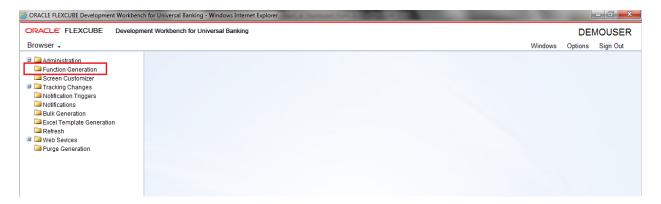


Fig 5.1: Function Generation tab

- Select Action New.
- *Dash Board-id* is to be entered in Function Id field. It follows the same naming convention as a normal function id
- Select Function Type Parent
- Select Function Category Dashboard

Function Generation		_ >
		🔚 🗷 🗏 🐬 🍕 🔿
Action New  Function Id Save XML Path Search Preferences DataSource ListOfValues DataBlocks Screens FieldSets Actions Califorms	Function Type Parent  Parent Function Parent Xml	Function Category Maintenance  Header Template Report Footer Template Summary DaabBoard Others
🗀 LaunchForms 🗀 Summary		
	Fig 5.2: Selecting Function C	ategory

### 3.1 Preferences

Developer can maintain the menu details in Preferences screen. Please note that **TYPE STRING** will be generated as 'D' for dashboard screens in **smtb\_menu**.

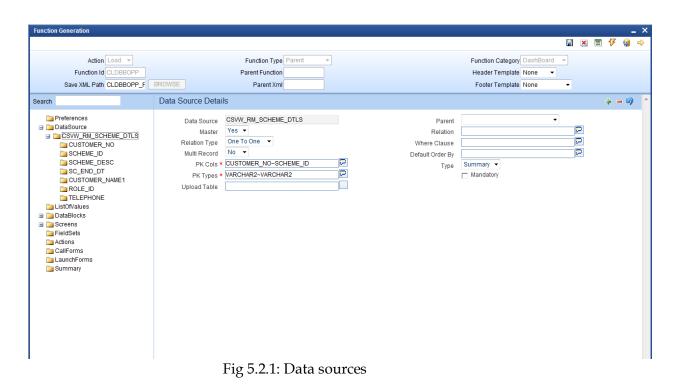
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

Action Load -	Function 1 Parent Func	Type Parent -		Function Category DashBoard		• 🥵
Save XML Path CLDBBOPP_F	BROWSE Parent	Xml		Footer Template None	•	
arch	Preferences					9
Preferences     DataSource     ListOt/values     DataBlocks     Soreens     FieldSets     Actions     CallForms     LaunchForms     Summary	Head Office F Logging Requ Auto Authoriza Tank Modifica Field Log Ree Multi Branch A Excel Export R	uired ation tions quired Access	Module Module Description Branch Program Id Process Code SVN Repository URL Transaction Block Name Transaction Field Name	Core Choose Block		
				1	Control String + -	]
	Function Id		Module *	Module Description		
	CLDBBOPP	CS CS		Core		
						-

Fig 5.1.1: Selecting the Preferences

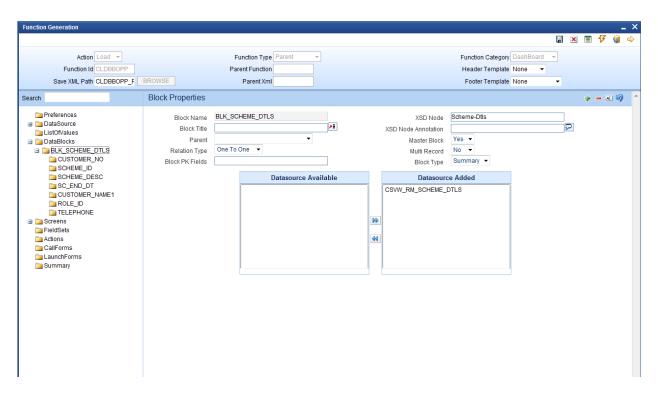
#### 3.2 Data Sources

Developer can add table as per the requirement. Please note that dashboard screen supports only one data source to be added in a screen (which has to be the master data source)



### 3.3 Data Blocks

Data block has to be created and attach the data source to the block. Currently, dashboard screens can have only one data block





#### 3.3.1 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.

Function Generation				_ ×
				📱 🗶 🗏 7 🧐 🔿
Action Load - Function Id CLDBBOPP Save XML Path CLDBBOPP_F	Function Type Parent Parent Function BROWSE Parent Xml	▼ ] ]	Function Category DashBoard Header Template None - Footer Template None	v •
Search	Block Field Properties			- 🗷 🗔 🧐 🔺
Preferences DataSource ListOtValues DataBlocks DataBlocks DataBlocks DCUSTOMER_NO SCHEME_DDLS SCHEME_DD SCHEME_DD SCHEME_DD CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 CUSTOMER_NAME1 FieldSets Addons CaliForms LaunchForms LaunchForms Summary	Field Name * CUSTOMER_NO Field Label LBL_CUSTID F DataSource CSWW_RM_SCHEME_DTLS Column Name * CUSTOMER_NO Data Type * Varchar2 * Display Type LINK * Item Type Database Item * Parent Field Related Block * Related Block Related Block Related Field * LOV Name * Fieldset Name *	XSD Annotation Field Size * Maximum Length Minimum Value Maximum Value Maximum Decimals TextArea Rows TextArea Columns Default Value Preview Value	CUSTID	
		Link Tune	Eurotion Nome	+-
	Column	Link Type Standard	Function Name CODSCMQY	

Fig 5.3.1.1: Block fields

Level: 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

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.

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.

#### 3.4 Summary

Development Workbench currently supports only summary dashboards. Attach the block to the summary screen. Hence don't 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* 

Don't provide any values in default where clause. This has to be maintained by the user through user dashboard maintenance screen in Flex cube. Attach the fields which are required in the summary screen.

Function Generation							
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Action Load *	Function Type Parent		Function Category DashBoard				
Function Id CLDBPINAU							
	Parent Function		Header Templale None •				
Save XML Path CLDBPNAU_F BROWSE	Parent Xml		Fooler Template None	•			
Search Summary Details				Øý ^			
Preferances							
DeleSource	22						
ListOfvalues Data Blocks	BLK_UNAUTH   CLVW_UNAUTH_TRNS	Default Order By					
DataBlocks     Data Source     Screens	Summary	Multi Branch Where Clause					
	Medium ·	Main Summary Screen					
Actions Summary Screen Size	mouse		WebServices				
CaliForms			Required				
LaunchForms Data Block Fields C	usiom Butions Fields Ordering						
Commonly							
	Data Block Fields	Fields Selected	Query LOV Name	*			
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Below screenshot shows the summary screen along with the preview of the screen

Fig 4.4.1: Summary Screen

# 4 Generation of units

Following units needs to be generated and deployed for the proper functioning of summary dashboard screen.

- i) SYS js
- ii) UIXML
- iii) Menu details inc (smtb\_menu)
- iv) Summary Details inc(cstb\_summary\_info)
- v) Label Details, Data source details

## 5 User Maintenance

User need to maintain the dashboards accessible to him in user dashboard maintenance screen in FLEXCUBE . Sequence number of the screens as well as the *where clause of summary screen* has to be provided here.



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