Development of Dashboard Forms Oracle Banking Trade Finance Release 14.7.4.0.0 Part No. F99781-01 June 2024



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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
FLEXCODE Technical Arcintecture	Financial Software Services.
	Financial Software Services.
FLEXCUBE Object Naming conventions	Development Overview Guide
, C	-
FLEXCUBE Screen Development	04-Development_WorkBench
	_Screen_Development-I.docx
Working knowledge of Web based	Self Acquired
applications	
Working knowledge of Oracle Database	Oracle Documentations
Working knowledge of PLSQL & SQL	Self Acquired
Language	
Working knowledge of XML files	Self Acquired
working knowledge of Mill Illes	John neganica

1.2 Related Documents

04-Development WorkBench Screen Development-I.docx 05-Development WorkBench Screen Development-II.docx

2 Introduction

This document provides information on:

- <u>Chapter 2 , "Introduction"</u>
- <u>Chapter 3 , "Creating Dashboard Form"</u>
- <u>Chapter 4 , "Generation of Units"</u>
- <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 Type Parent	Function Category Maintenance -
Function Id	Parent Function	Header Template Maintenance Report
Save XML Path	Parent Xml	Footer Template Transaction - Summary
Search		DashBoard Others
Preferences		
DataSource		
ListOfValues		
DataBlocks		
Creens		
Actions		
CallForms		
🗀 LaunchForms		
Caral Summary		
-	Fig 5.2: Selecting Function	Category

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**.

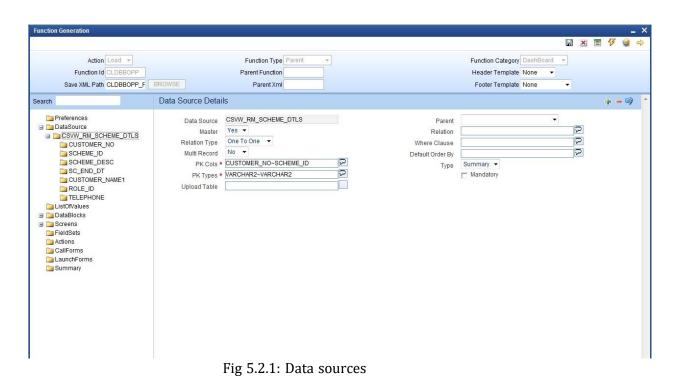
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

Function Generation							×
					× = 7	W	\$
Action Load -	Function Parent Fur	Type Parent -		Function Category DashBoard			
Save XML Path CLDBBOPP_F	BROWSE Paren			Footer Template None 👻			
Search	Preferences					ŋ	
Preferences DataSource ListOfValues DataBlocks FieldSets Actions LaunchForms Summary	☐ Head Office ☐ Logging Rec ☐ Auto Authoriz ☐ Tank Modific ☐ Field Log Re ☐ Multi Branch ☐ Excel Export	utired ration ations rquired Access	Module Module Description Branch Program Id Process Code SVN Repository URL Transaction Block Name Transaction Find Name	Core Choose Block Choose Field			
				Co	ntrol String +	-	
	Function Id		Module *	Module Description		*	
	CLDBBOPP	CS		Core			
	CLSBBOPP	CS	<u> </u>	Core			

Fig 5.1.1: Selecting the Preferences

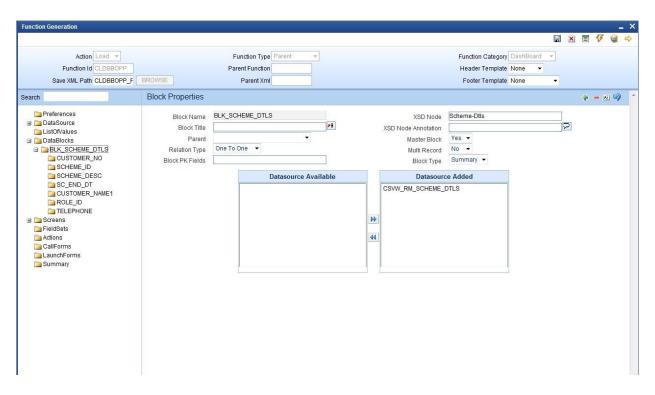
3.2 Data Sources

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.

Action Load Function Type Parent Function Type Parent Function Function Category DashBoard Header Template None Header Template None Function Header Template None Function	Header Template None Footer Template None XSD Tag CUSTID XSD Annotation Required Field Size * Read Only Maximum Length Calender Text Maximum Dedinals Uppercase Only TextArea Rows Input by LOV Only Not Required In Xsd Not Required In Xsd
Function Id CLEBBOPP Parent Function Header Template None Save XML Path CLEBBOPP BROWSE Parent Xml Footer Template None Search Block Field Properties	Header Template None Footer Template None Solution XSD Tag USTID Required XSD Anotation Field Size * Read Only Maximum Value Maximum Value Maximum Value Visible Calender Text Minimum Value Uppercase Only Maximum Decimals TextArea Rows Input by LOV Only TextArea Columns Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite Visite V
Save XML Path: CLDBBOPP_F EROWSE Parent Xml Footer Template None iearch Block Field Properties	XSD Tag CUSTID Required XSD Annotation Image: Comparison of the
Block Field Properties	XSD Tag CUSTID Required XSD Annotation Visible Field Size * Read Only Maximum Length 9 Maximum Value Popue Edit Required Maximum Value Uppercase Only Maximum Decimals Visible TextArea Rows Input by LOV Validation Required Input by LOV Only Not Required In Xsd
Preferences Field Name * CUSTOMER_NO XSD Tag CUSTID I DataSource Field Label EBL_CUSTID XSD Annotation Image: Custom cost of the state	XSD Tag CUSTID Required XSD Annotation Visible Field Size * Read Only Maximum Length Calender Text Minimum Value Uppercase Only Maximum Decimals FLOV Validation TextArea Rows Input by LOV Only TextArea Columns Not Required In Xsd
DataSource Field Name GOUND Field Load Field	XSD Anotation Visible Field Size * Read Only Maximum Length Calender Text Minimum Value Popup Edit Required Maximum Decimals Uppercase Only TextArea Rows Input by LOV Only TextArea Columns Not Required In Xsd
ListOWalues Field Label List_COSID Pain XSD Annotation V V DataBlocks DataSucce CSWW_RN_SCHEME_DTLS Field Size + Field Siz	Field Size * Read Only Maximum Length Calender Text Minimum Value Popup Edit Required Maximum Value Uppercase Only Maximum Decimals FLOV Validation Required TextArea Rows Input by LOV Only TextArea Columns Not Required In Xsd
DataBlocks DataSource CSWW_RM_SCHEME_DTLS Field Size * DataSource CSWW_RM_SCHEME_DTLS Column Name * Maximum Length CLUSTOMER_NO Data Type * Varchar2 * Minimum Value Image: Column Value SCHEME_DSC Display Type LINK Maximum Value Image: Column Value Image	Maximum Length 9 Calender Text Minimum Value Popup Edit Required Maximum Decimals Uppercase Only TextArea Rows Input by LOV Validation Required Input by LOV Only TextArea Columns Not Required in Xsd
CUSTOMER_NO Data Type * Varchar2 * Minimum Value Display Type LINK Maximum Value Display Type LINK Maximum Value CallForms CUSTOMER_NAME1 Parent Field Parent Field TedArea Rows Customere Anale CallForms CallForms Customere Anale	Minimum Value Popup Edit Required Maximum Value Uppercase Only Maximum Decimals CUV Validation TextArea Rows Input by LOV Only TextArea Columns Not Required in Xsd
SCHEME_DD SCHEME_DDSC Sc_END_DT tem Type Display Type LINK Maximum Value Sc_END_DT tem Type Database Item Maximum Decimals Sc_END_DT Related Block TextArea Rows Sc_END_DD Related Block TextArea Columns Sc_END_DD Related Field Sc_END_DD Sc_END_DD	Maximum Value Uppercase Only Maximum Decimals Impute Validation Required TextArea Rows Impute Validation Inpute Validation Required In Xsd
SCHEME_DESC Lispiay type Link Maximum Value SC_END_DT Item Type Database Item ▼ Maximum Decimals CUSTOMER_NAME1 Parent Field TextArea Rows ROLE_JD Related Block TextArea Columns TELEPHONE Related Field Default Value Actions Off Line LOV Name Preview Value Califorms Fieldsets Mask Id	Maximum Decimals Image: Constraint value Maximum Decimals Image: Constraint value TextArea Rows Image: Constraint value TextArea Columns Image: Constraint value TextArea Columns Image: Constraint value Not Required In Xsd
SC_END_DT Item Type Database Item • Maximum Decimals CUSTOMER_NAME1 Parent Field TextArea Rows CUSTOMER_NAME1 Related Block TextArea Rows TELEPHONE Related Field TextArea Columns Screens LOV Name Default Value Actons Off Line LOV Name Mask Id Califorms Fieldset Name Mask Id	TextArea Rows Required Not Required Not Required Not Required Not Required In Xsd
COSTOMER, NAMET C	TextArea Rows Input by LOV Only TextArea Columns IN the Required in Xsd
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Screens Lou V Name Default Value PE Gelddets LOV Name Preview Value Addions Off Line LOV Name Mask Id CallForms Fieldset Name Mask Id	Defendation A
FieldSets LOW Name Preview Value Actions Off Line LOV Name Mask Id Fieldset Name LaunchForms Cultion Mitriving, Example Preview Value Deschlement Lake 	
Callforms Culton Mitching Equation Addition	
LaunchForms Custom Attitudes Exactly Development Link	Mask Id
Level Link Type Function Name	
Column	▼ 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.

		🖫 🗵 🗐 🖗 🤿	
Action Load Function Id CLDEPWALL Save XML Pain CLDBPNAU_F BROWSE	Function Type Parent v Parent Function Parent Xm	Function Category DashBoard	
Search Summary Details		29	
Preferences Title DataSource DataSource DataBlocks DataSource DataBlocks DataSource Streens Streens Streens Summary Screen Size CallForms LaunchForms Summary Data FlockFielde CallForms	BLK_UNAUTH CLVW_UNAUTH_TRNS Summary Medium storm Buttons Frields Ordering	Dafaull Where Clause Default Order By Multi Branch Where Clause Main Summary Screen WebServices Reguired	
Summary			
	Data Block Fields	Fields Selected Query LOV Name	
		ISTOMER_ID	
		DULE_CODE	
	EV	ENT	
	E AC		
	I I BR	IANCH_CODE	
	Customer ID Account Number	Currency Amount Module Code Event	
	•		

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.



Development of Dashboard Forms

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