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.

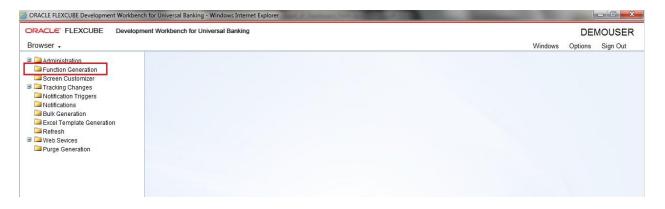


Fig 5.1: Function Generation tab

- 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**.

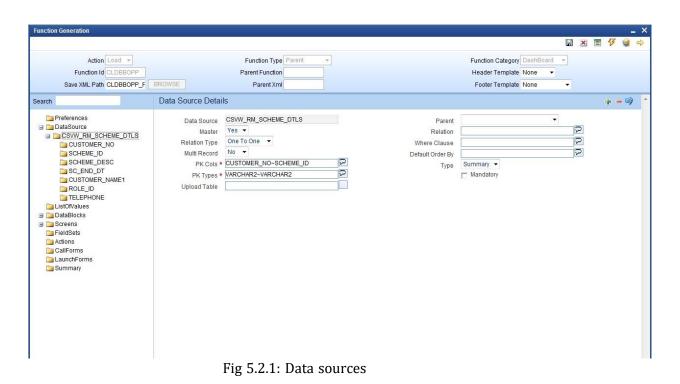
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

Function Generation							×
					× = 7	<b>W</b>	\$
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

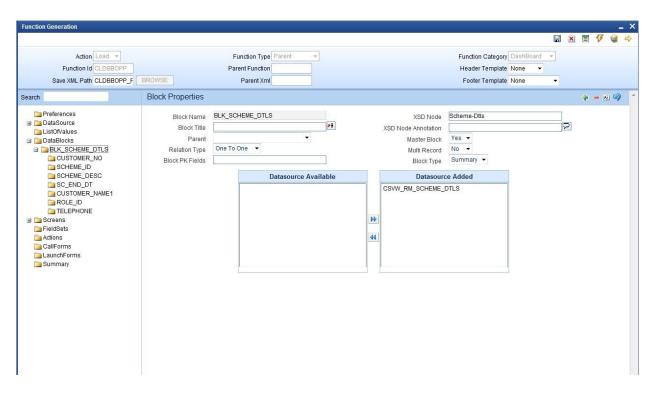
### 3.2 Data Sources

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
INCLE_PIONE     Related Block     TextArea Columns       TELEPHONE     Related Field     Default Value       Screens     LOV Name     Preview Value       Fieldsets     Off Line LOV Name     Mask Id       Actions     Fieldset Name     Mask Id	TextArea Columns
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 <ul> <li>Mask Id</li> <li>Fieldset Name</li> <li>LaunchForms</li> <li>Cultion Mitriving, Example Preview Value</li> <li>Deschlement Lake</li> </ul>	
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		<b>29</b>	
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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