Development of Dashboard Forms Oracle Banking Trade Finance Release 14.8.0.0.0 Part No. G30072-01

[April] [2025]



Development of Dashboard Forms

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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	04-Development_WorkBench
	_Screen_Development-I.docx
Working knowledge of Web based applications	Self Acquired
Working knowledge of Oracle Database	Oracle Documentations
Working knowledge of PLSQL & SQL	Self Acquired
Language	
Working knowledge of XML files	Self Acquired

#### 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.

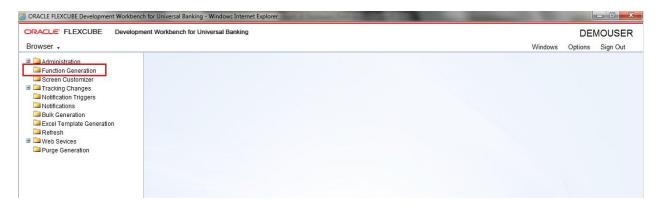


Fig 5.1: Function Generation tab

- 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 Report
Save XML Path	Parent Xml	Footer Template Transaction
Search		Summary DashBoard Others
in Preferences		
Calification and the second se		
DataBlocks		
Screens		
i FieldSets		
CallForms		
🗀 LaunchForms 🛅 Summary		
Summary		
	Fig 5.2: Selecting Function	Category
	i ig J.2. Scieeting i unetion	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 Id CLDBBOPP       Parent Function       Header Template None         Save XML Path CLDBBOPP F       BROWSE       Parent Xml       Footer Template None         Search       Preferences       Head Office Function       Module       CS       Plant         B DataSource       Logging Required       Module Description       Orfe         LotOValues       Auto Authorization       Branch Program Id       Orfe         B DataSlocks       Tank Modifications       Process Code       Orfe         Califorms       Hulti Branch Access       Transaction Block       Choose Block       Name         Califorms       Multi Export Required       SVN Repository URL       Choose Block       Name         Summary       Field Log Required       SVN Repository URL       Choose Block       Name         Function Id       Module V       Mame       Choose Block       Name	Save XML Path CLDBBOPP_F	BROWSE Parent Preferences Head Office F Logging Requ Auto Authoriza	xmi		Footer Template None	•	ŋ
Preferences       Head Office Function       Module       CS       All         DataSource       Logging Required       Module Description       Core         DataBlocks       Auto Authorization       Branch Program Id       Image: CS       All         DataBlocks       Tank Modifications       Process Code       Image: CS       Image: CS <td< th=""><th>arch  Preferences  DataSource ListOt/values  Control Control  Screens FieldSets</th><th>Preferences</th><th>unction</th><th></th><th></th><th>•</th><th>ŋ</th></td<>	arch  Preferences  DataSource ListOt/values  Control Control  Screens FieldSets	Preferences	unction			•	ŋ
Preferences <ul> <li>Head Office Function</li> <li>Module</li> <li>CS</li> <li>DataSource</li> <li>Logging Required</li> <li>Module Description</li> <li>Core</li> <li>DataBlocks</li> <li>Auto Authorization</li> <li>Branch Program Id</li> <li>Screens</li> <li>Tank Modifications</li> <li>Process Code</li> <li>Control String +</li> </ul>	Preferences DataSource ListOfValues ListOfValues Screens FieldSets	☐ Head Office F ☐ Logging Requ ☐ Auto Authoriza	lired		CS AI		9
DataSource       Logging Required       Module Description         DataBlocks       Auto Authorization       Branch Program Id         DataBlocks       Tank Modifications       Process Code         Field Log Required       SVN Repository URL       SVN Repository URL         Actions       Multi Branch Access       Transaction Block         CaliForms       Excel Export Required       Name         Summary       Choose Field       Name	a ⊡ DataSource	Logging Requ	lired		CS		
	CallForms CallForms	Multi Branch A	tions juired ccess	Branch Program Id Process Code SVN Repository URL Transaction Block Name Transaction Field	Choose Block		
Function Id Module* Module Description						Control String +	
							^
CLDBBOPP CS		CLDBBOPP	CS	25	Core		
CLSBBOPP CS PE Core		CLSBBOPP	CS	21	Core		-

Fig 5.1.1: Selecting the Preferences

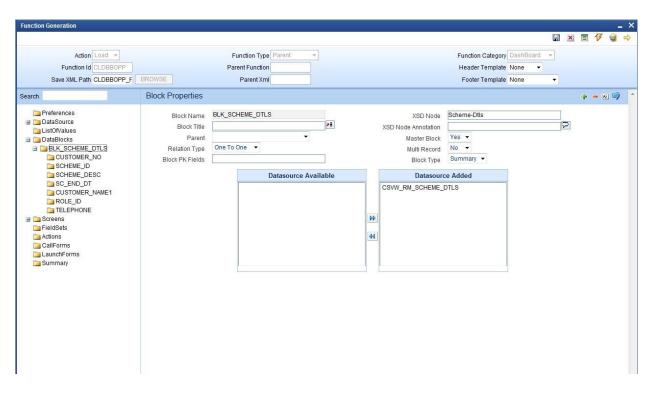
#### 3.2 Data Sources

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)

Action Load  Function Type Parent Function Type Parent Function Id CLDBBOPP Function Id CLDBBOP Functid Function Id CLDBBOP				
■ DataSource     Master     Yes     Relation       ■ SCWW_RM_SCHEME_DIS     Master     Yes     Relation       ■ SCHEME_DD     Multi Record     No     Default Order By       ■ SCHEME_DESC     PK Cols*     CUSTOMER_NO-SCHEME_DD     Type       ■ SCHEME_DISC     PK Cols*     CUSTOMER_NO-SCHEME_DD     Type       ■ SCHEME_DISC     PK Types*     VARCHAR2-VARCHAR2     Mandatory       ■ SCHEME_DD     Upload Table     Mandatory	Function Category DashBoard  Header Template None  Footer Template None Parent Clause Clause Type Summary	Function Type Parent  Parent Function Parent Function Parent Xmi Parent  Parent Par	P P Parent Function P_F BROWSE Parent Xml Data Source Details Data Source CSWW_RM_SCHEME_DTLS B Data Source CSWW_RM_SCHEME_DTLS B Data Source One to One  Multi Record No  PK Cols CUSTOMER_NO-SCHEME PK Types  VARCHAR2-VARCHAR2	Function Id CLDBBOPP Save XML Path CLDBBOPP_F Save XML Path CLDBBOPP_F Save XML Path CLDBBOPP_F CLDBBOPP_F CLDBBOPP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOP CLDBBOPP CLDBBO

#### 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.

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Action Load -	Function Type Parent		Function Category DashBoard	T
Function Id CLDBBOPP	Parent Function		Header Template None 👻	
Save XML Path CLDBBOPP_F	BROWSE Parent Xml		Footer Template None	-
Search	Block Field Properties			- R 🛛 🔊 🔺
Preferences DataSource ListOValues DataBlocks DataBlocks DataBlock DataBlock CUSTOMER_NO CUSTOMER_NO SCHEME_ID CUSTOMER_LOSC SCHEME_DESC CUSTOMER_NAME1 CUSTOMER_NAMEN CUS	Field Name * CUSTOMER_NO Field Label LEL_CUSTID * DataSource CSW_RM_SCHEME_DLS Column Name * CUSTOMER_NO Data Type * Varchar2 * Display Type LINK * Item Type Database Item * Parent Field * Related Block Related Field *	XSD Tag XSD Annotation Field Size * Maximum Length Minimum Value Maximum Decimals TextArea Rows TextArea Columns		Required     Visible     Read Only     Calender Text     Popup Edit Required     Uppercase Only     LOV Validation     Required     Input by LOV Only     Not Required In Xsd
Screens     FieldSets     CallForms     LaunchForms     Summary	LOV Name Off Line LOV Name Fieldset Name Custom Attributes Events DashBoard Link	Default Value     Preview Value     Mask Id		Report Parameter
	Level	Link Type	Function Name	*
	Column •	Standard	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.

Below screenshot shows the summary screen along with the preview of the screen

Function Generation			*** X
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Action Load *	Function Type Parent	Function Category DashBoard	
Function Id CLDBPNAU	Pareni Function	Header Templale None *	
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- (			
Search Summary Detail	5		9
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Summary	N		
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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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