Development of Dashboard Forms Oracle Banking Trade Finance Release 14.7.6.0.0 Part No. G32642-01

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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.

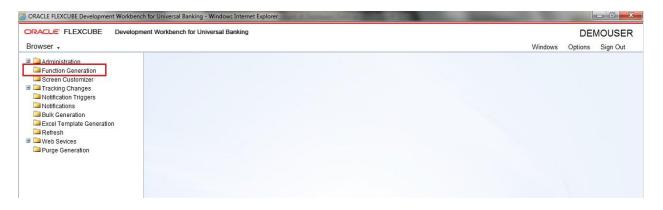


Fig 5.1: Function Generation tab

- 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 - Header Template Maintenance
Function Id Save XML Path	Parent Xml	Footer Template Transaction
Search		Summary DashBoard Others
Preferences DataSource		
ListOfValues		
🔁 Screens 🔁 FieldSets		
CallForms		
🦳 LaunchForms 🍋 Summary		
1	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**.

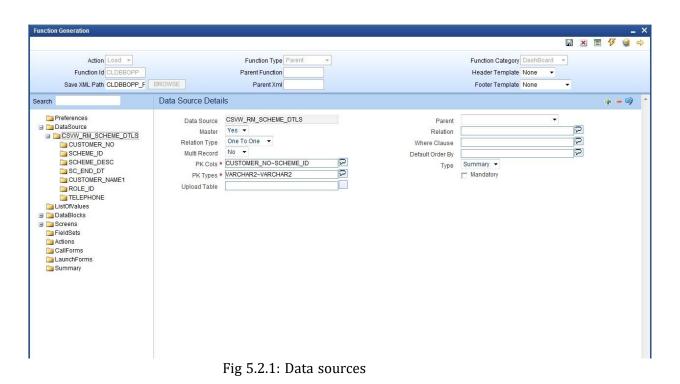
Currently only summary dashboard screens are supported. So maintain menu details only for summary screens.

Function Generation						×				
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Search	Preferences									
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	CLDBBOPP	CS	×E.	Core						
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Fig 5.1.1: Selecting the Preferences

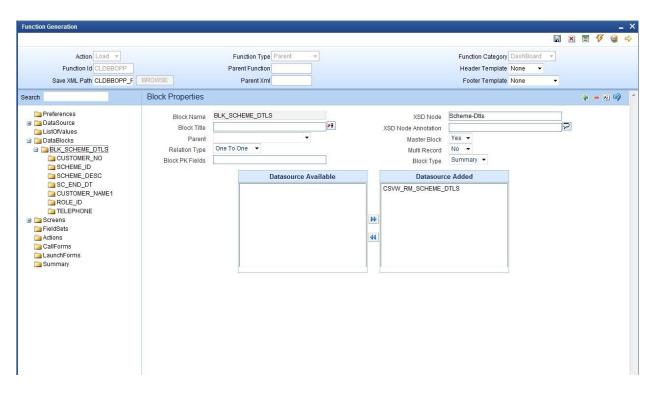
3.2 Data Sources

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 Id CLDBBOPP BROWSE Search Block Field Properties DataSource Field Name * CUST DataSource ListOValues DataBlocks DataSource COSW CuSTOMER_NO Scheme_DESC Scheme_DESC Scheme_NAME1 ROLE_ID Related Field ROLE_ID Related Field Screens LOV Name	CUSTID V_RM_SCHEME_DT FOMER_NO har2 -		XSD Tag XSD Annotation Field Size * Maximum Length Minimum Value	Header Ten Footer Ten CUSTID	tegory DashBoard mplate None - mplate None	
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Save XML Path CLDBBOPP_F BROWSE arch Block Field Properties Preferences DataSource ListOt/alues DataBlocks DataBlocks Column Name CUST Column Name CUST Column Name CUST SC_END_DT SCHEME_DESC SC_END_DT CUSTOMER_NAME1 Role_ID TELEPHONE Screens Lov Name CUST	Parent Xml		XSD Annotation Field Size * Maximum Length Minimum Value	Footer Ten	mplate None	- Required Required Visible Read Only
arch Block Field Properties Preferences DataSource ListOt/values DataBlocks DataBlocks CUSTME_NO SCHEME_DESC SC_END_DT CUSTOMER_NAME1 Rolae_DO SCHEME_DESC TELEPHONE Screens LoV Name Display Type LiNK Related Field Field State Lov Name	TOMER_NO CUSTID V_RM_SCHEME_DT TOMER_NO har2 ~ base Item ~		XSD Annotation Field Size * Maximum Length Minimum Value			- Required Required Visible Read Only
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DataSource Field Name ListOValues Field Label DataBlocks DataSource CUSTOMER_NO Data View CUSTOMER_NO Data View SCHEME_DESC Display Type LINK Customer, NAME1 RolLe_ID Related Field ROLE_ID Related Field Screens LOV Name	CUSTID V_RM_SCHEME_DT TOMER_NO har2 v base Item v		XSD Annotation Field Size * Maximum Length Minimum Value	•		Visible
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Screens LOV Name		•	TextArea Columns			Not Required In Xsd
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Actions Off Line LOV Name		•	Mask Id		* =	
CallForms Fieldset Name						
Summary Custom Attributes Events I	DashBoard Link					
		•				+ -
	Level		Link Type		unction 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.

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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.



Development of Dashboard Forms

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Oracle Financial Services Software Limited Oracle Park Off Western Express Highway Goregaon (East) Mumbai, Maharashtra 400 063 India

Worldwide Inquiries: Phone: +91 22 6718 3000 Fax:+91 22 6718 3001 www.oracle.com/financialservices/

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