

Oracle Utilities Customer Care and Billing

Optional Products Installation Guide

Release 2.5.0.2

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Preface

This guide provides instructions for installing and configuring optional products that can be used with Oracle Utilities Customer Care and Billing.

Audience

Oracle Utilities Customer Care and Billing Optional Products Guide is intended for anyone who needs to install and configure optional products for Oracle Utilities Customer Care and Billing.

Related Documents

For more information, refer to these Oracle documents:

Installation Guides and Release Notes

- *Oracle Utilities Customer Care and Billing V2.5.0.2 Release Notes*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Quick Install Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Installation Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Database Administrator's Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Optional Products Installation Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 License Information User Guide*

Administrative and Business User Guides

- *Oracle Utilities Customer Care and Billing V2.5.0.2 Administrative User Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Business User Guide*

Supplemental Documents

- *Oracle Utilities Customer Care and Billing V2.5.0.2 Server Administration Guide*
- *Oracle Utilities Customer Care and Billing V2.5.0.2 Security Guide*

Updates to this Documentation

Refer to My Oracle Support for up-to-date additional documentation.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Chapter 1

Overview

This chapter provides an overview of the optional products available for Oracle Utilities Customer Care and Billing, including:

- [Optional Products for Oracle Utilities Customer Care and Billing](#)
- [What is this book?](#)

Optional Products for Oracle Utilities Customer Care and Billing

This document discusses the following optional products that can be used with Oracle Utilities Customer Care and Billing

- Oracle BI Publisher
- Oracle Documaker

What is this book?

This book describes the installation and configuration of optional products for Oracle Utilities Customer Care and Billing, including the following:

- [Chapter 1: Overview](#) (this chapter) provides an overview of the optional products used with Oracle Utilities Customer Care and Billing.
- [Chapter 2: Reports Configuration](#) discusses the reporting features of the Oracle BI Publisher software that can be used by Oracle Utilities Customer Care and Billing.
- [Chapter 3: Additional Products](#) discusses other software products, including Oracle Documaker.

Chapter 2

Reports Configuration

Reports Configuration for Oracle BI Publisher

This section describes the steps required to configure Oracle Utilities Customer Care and Billing and Oracle BI Publisher to support a reporting solution that uses Oracle BI Publisher, including:

- [Supported BI Publisher Versions](#)
- [Installing Oracle BI Publisher Enterprise](#)
- [Configuring The System To Enable Reports](#)
- [Configuring the System for Batch Bill Print](#)
- [Sample Reports Supplied with the Product](#)

Supported BI Publisher Versions

At the time of release the supported versions for Customer Care and Billing Release 2.5.0.2 are:

- **Windows:** BI Publisher 11g (11.1.1)
- **Unix:** BI Publisher 11g (11.1.1)

Installing Oracle BI Publisher Enterprise

Oracle BI Publisher Enterprise provides the tools for:

- Making reports available over the web (establishing the required report server processes)
- Integrating reports with the Oracle Utilities Customer Care and Billing system
- Scheduling reports to run on a regular basis
- Managing instances of the reports that have been created by a previous run
- Managing user access to the report instances

This section assumes that you have already installed Oracle BI Publisher Enterprise such that requests can be pointed to the Oracle BI Publisher Enterprise running on Windows or Unix.

Note: Images Do Not Generate Properly Without X Server in Unix version of BI Publisher. If you are running the BI Publisher server on a Linux or Unix machine that does not have an X Server installed reports that contain images may not be properly generated. Workaround: Specify the following property at the java command line:

```
-Djava.awt.headless=true
```

Configuring The System To Enable Reports

This section describes the steps needed to configure your system to enable reports, including:

- [Configure the System to Invoke Oracle BI Publisher Enterprise Real-time](#)
- [Interface with Oracle BI Publisher Enterprise Batch Scheduler](#)

Configure the System to Invoke Oracle BI Publisher Enterprise Real-time

In order to invoke Oracle BI Publisher Enterprise from within Oracle Utilities Customer Care and Billing, the system must be configured so that Oracle Utilities Customer Care and Billing knows how to invoke reports.

Specify Reporting Tool Options

The following information should be defined on Reporting Tool Options table:

- **Reporting Server** is the web server URL where the reporting tool is installed.
- **Reporting Folder** defines the name of the directory on the Oracle BI Publisher server where reports are located. The Oracle Utilities Customer Care and Billing reporting tool algorithm constructs the URL to open Oracle BI Publisher Enterprise based on the information provided on Reporting Options. The same folder name should be used as a report folder in Oracle BI Publisher Enterprise where reports are published.

Refer to the Reports chapter of the Oracle Utilities Customer Care and Billing online documentation for more information about the reporting options table.

Reporting Tool Algorithm

The base product provides an installation algorithm plug-in spot called Reporting Tool. This plug-in spot should contain an algorithm that invokes the reporting tool real-time. Oracle Utilities Customer Care and Billing provides an algorithm type called F1-BIPR-INV, which invokes Oracle BI Publisher Enterprise.

This algorithm relies on information defined in the Reporting Options table: the reporting server and folder names for accessing the reporting tool. The algorithm constructs several strings, for example, the URL of the BI Publisher, information about the report being requested and user info in the format expected by Oracle BI Publisher Enterprise. The Java program returns the correct URL to the browser. The browser then opens a BI Publisher Enterprise window with the appropriate URL.

To use the F1-BIPR-INV algorithm type to invoke Oracle BI Publisher Enterprise, perform the following steps:

1. Create an algorithm for this algorithm type.
2. On the installation options, add an entry to the algorithm collection with an algorithm entity of Reporting Tool and indicate the algorithm created in the previous step.

Interface with Oracle BI Publisher Enterprise Batch Scheduler

Presently Oracle Utilities Customer Care and Billing does not provide support for batch jobs with Oracle BI Publisher. Please use Oracle BI Publisher directly in order to schedule reports to run in batch.

Configuring the System for Batch Bill Print

This section describes the steps for configuring the applications to print bills in batch.

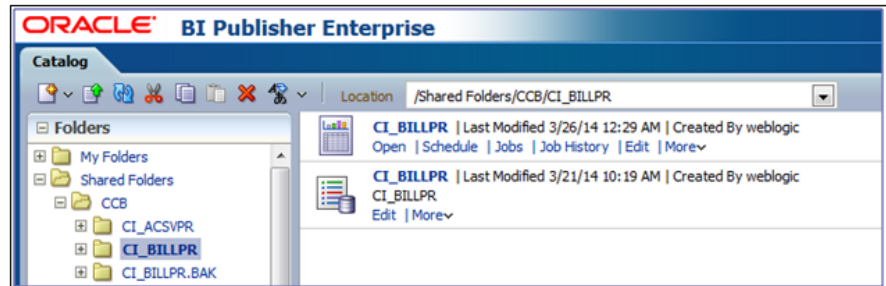
Configure Oracle BI Publisher for Batch Bill Print

1. Configure the Oracle BI Publisher Scheduler to allow report job submission.

Refer to the *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information. The section for configuring the scheduler is available at:

http://docs.oracle.com/cd/E28280_01/bi.1111/e22255/config_sched.htm

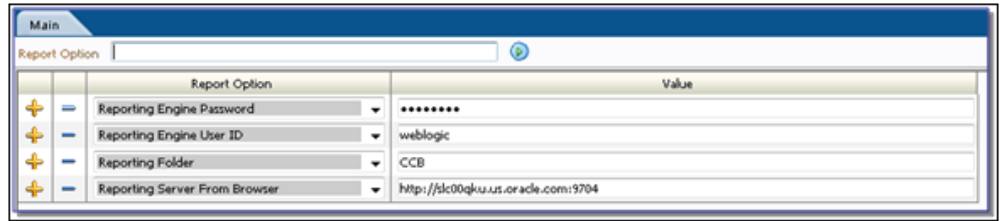
2. Ensure that the CI_BILLPR report artifacts (CI_BILLPR.rtf, CI_BILLPR.xdo, CI_BILLPR.xdm) are deployed to corresponding BI Publisher catalog folder:



Configure Oracle Utilities Customer Care and Billing for Batch Bill Print

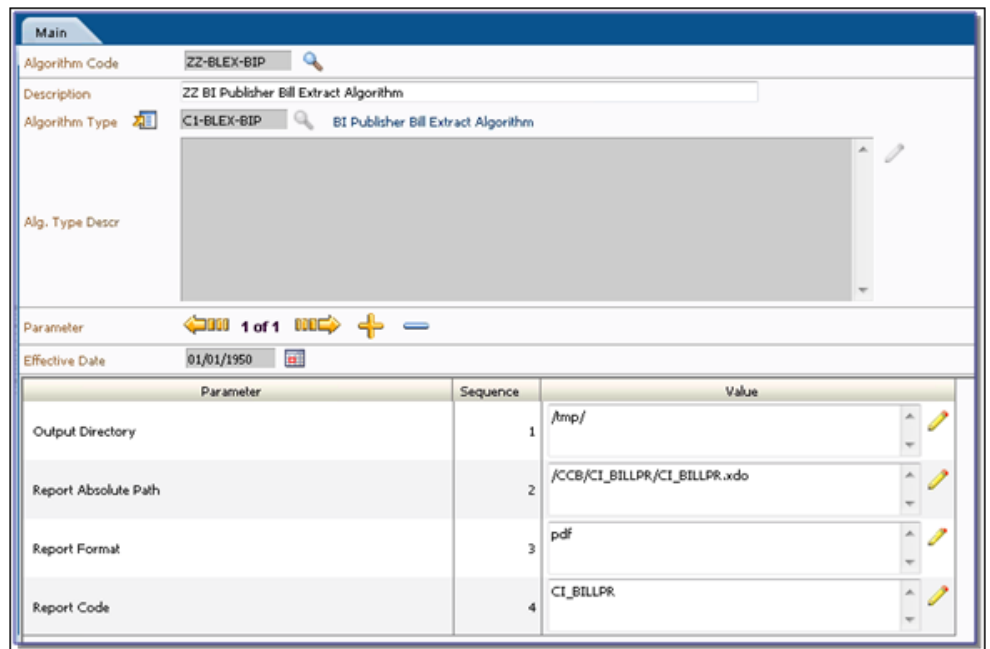
1. Go to **Admin Menu, R, Reporting Options** and configure the following values:
 - **Reporting Server from Browser** should point to the correct BI Publisher Server URL. For example: `http://<hostname>:port`
 - **Reporting Folder** is the name of the Catalog Folder in BI Publisher where CI_BILLPR is located. For example: CCB
 - **Reporting Engine User ID** is the BI Publisher User ID.

- **Reporting Engine Password** is the BI Publisher Password.



2. Create a custom Bill Route Type Extract Algorithm using the C1-BLEX-BIP Algorithm Type. Ensure that the following algorithm soft parameters are set:

- **Output Directory** is the directory in BI Publisher server where the generated output files will be placed. For example: /tmp/
- **Report Absolute Path** is the path where CI_BILLPR.xdo is located in the BI Publisher Catalog. For example: /CCB/CI_BILLPR/CI_BILLPR.xdo
- **Report Format** is the format of the generated output files. For example: pdf
- **Report Code** is the CI_BILLPR report code. For example: CI_BILLPR



3. **Go to Admin Menu, B, Bill Route Type** and configure the corresponding Bill Route Type (i.e., POSTAL) to use the RTTYPOST Batch Control and the custom Bill Route Type Extract Algorithm.

Sample Reports Supplied with the Product

The system provides several sample reports that may be used by your organization as a starting point for creating a new report. The following sections provide instructions on how to set up your implementation environment to use the sample reports.

Refer to the Reports chapter of the Oracle Utilities Customer Care and Billing online documentation or a description of each sample report.

If you would like to use any of the sample reports, you need to perform some steps to be able to execute them in an implementation environment. This section walks you through the steps needed, including:

- [Oracle Functions and Packages](#)
- [Unzip Oracle Utilities Customer Care and Billing Report Files](#)
- [Publish the Sample Reports in Oracle BI Publisher Enterprise](#)
- [Prepare Oracle BI Publisher Enterprise Server For integration](#)
- [Setting Up the Company Title and Logo](#)
- [Oracle Utilities Customer Care and Billing User ID and Report Code](#)
- [How To Copy a Report Definition From the Demonstration Database](#)
- [Adding Custom Layout to Existing Reports in BI Publisher](#)

Oracle Functions and Packages

Each report has one or more corresponding database function, package that store the business logic to fetch the data from the database that is then presented in the report.

The prerequisite for Oracle Utilities Customer Care and Billing reports to work against the target database is setting up of a RPTUSER database user. This user should have read access to all Oracle Utilities Customer Care and Billing database objects and execution privilege on the stored procedures that the reports access.

The steps involved in setting up the RPTUSER are:

1. Create the RPTUSER.

To create the RPTUSER (it doesn't exist), navigate to the Database\Oracle folder and edit the file CDX_rptuser.sql to match your requirements. The parameters in this file that need review are: password of the user, default and temporary tablespace names for the user.

Now log into the target database as a DBA user using SQLPLUS and execute the script by entering following command at SQL prompt:

```
SQL> @CDX_rptuser.sql
```

2. Create or refresh the Oracle functions and packages.

Log into the target database as the user CISADM that owns Oracle Utilities Customer Care and Billing schema objects using SQLPLUS and execute the script CDX_rptfn.sql by entering the following command at the SQL prompt:

```
SQL> @CDX_rptfn.sql
```

(“SQL>” denotes the SQL prompt and doesn't need to be typed).

3. Compile the report function.

```
SQL> @CDX_compfn.sql
```

4. Configure security.

This involves generating synonyms in RPTUSER and granting it privileges to execute the stored procedures and read the Oracle Utilities Customer Care and Billing tables. The utility prompts you to answer for the following questions:

- Enter the Oracle user that owns the schema (e.g. CISADM): **CISADM**
- Enter the password for the CISADM user: **CISADM**
- Enter the name of the Oracle Database: *Your_db*
- Enter a comma-separated list of Oracle users in which synonyms need to be created (e.g. cisuser,cisread): **RPTUSER**

The utility runs and configures security for the Oracle Utilities Customer Care and Billing objects.

Unzip Oracle Utilities Customer Care and Billing Report Files

Unzip the CCB-V2.5.0.1.0-Reports.zip file from the installation media into an empty directory. We'll refer to this directory as the reports extract folder.

Note: By default, the reports provided are read only. You will need to reset the permissions on the files before making any changes, for example, to configure the default data source.

Publish the Sample Reports in Oracle BI Publisher Enterprise

The installation media contains sample reports provided with the system. The report files are in the reports extract folder under ..\CCB-V25010-Reports\BIPublisher\reportFiles.

Install Oracle BI Publisher Enterprise. This section assumes that you have already installed Oracle BI Publisher Enterprise.

Note: If you install Oracle BI Publisher Enterprise in a location other than the default installation directory, adjust the path descriptions to match your actual install directories.

The first step you need to take in order to use any of the samples is to publish the report in Oracle BI Publisher Enterprise. You need to create a folder in Oracle BI Publisher Enterprise named as defined on Reporting Options table in Oracle Utilities Customer Care and Billing and publish there report extracted to the reports extract folder.

Create a folder named CCB in the *BI_Repository_Path*\Reports folder. Copy all Oracle BI Publisher sample reports into the CCB folder.

Note: To check for the location of your BI repository path, log in to the BI console as an Administrator and go to **Administration, Server Configuration**. If the repository type is File System, the path will be seen in Catalog region. If the repository type is not File System you cannot load the sample reports.

Please refer to the Oracle BI Publisher Enterprise documentation for more information.

Prepare Oracle BI Publisher Enterprise Server For integration

The CCB Reporting Options Table should include the following information about Reporting Server and Folder:

Reporting Folder: CCB

Reporting Server: URL of reporting server. For example: <http://sf-ugbu.splwg.com:9704>

If you want to have a different name for your reporting folder, you can rename the CCB folder on the server and put the corresponding value on the Reporting options table.

Next, access BI Publisher Enterprise Server:

1. Access the BI Publisher Enterprise Server as Administrator.

-
2. On the Admin tab define a **JDBC Connection** section under **Data Sources**, and add a new data source using **Add Data Source**.

Create a new Data Source named CCB with connection details pointing to the CCB database using the RPTUSER credentials set up in the prior section.

3. Test Connection to make sure the Database connection is successful and save changes using **Apply**.

Configure a new group in WebLogic:

1. Configure a group within WebLogic for Authentication called “BICustomer”.
2. Create an Application Role called “CCB Reports” to access the BI Publisher reports.
3. Associate the member “BICustomer” with the “CCB Reports” Application Role.

The role will now be visible from within the BI Publisher Enterprise. Within BI Publisher Enterprise, for the Role Name CCB Reports you just created, click on **Add Folders** to add the CCB sample reports to the Allowed Folders.

Do the same for Role Name CCB Reports. Click on **Add Data Sources** to add the CCB data source to the Allowed Data Sources.

To include appropriate Roles for Role Name CCB Reports, click on **Add Role**.

To verify Sample BI Publisher reports on Server:

1. Log in to Oracle BI Publisher Server as a user belonging to BICustomers.
2. Verify that all sample reports provided appear in the CCB folder.

Single-sign-on and more sophisticated security would need to be tailored to the specific implementation.

Setting Up the Company Title and Logo

The sample reports provided by the system use the company title that is defined on the Messages tab of the Installation Options - Framework page in Oracle Utilities Customer Care and Billing.

The Company Logo should be set up according to the following procedure:

1. Store the logo on the server and make a note of the relative path to the image.

For example, you can store the logo in the BI Domain Home Directory. Check with your BI Publisher administrator for the location of that directory.

2. Open the report template in Microsoft Word and use the Format Picture dialog box to specify the alternative text for the image.

The alternative text should be the directory path to the image. For example, if your logo, company_logo.gif, is in the logo folder in the home directory, the alternative text should be:

```
/logo/company_logo.gif.
```

Oracle Utilities Customer Care and Billing User ID and Report Code

The Oracle Utilities Customer Care and Billing user id and report Code are defined as the required parameter in every sample report. These parameters are hidden when report is submitted from Oracle Utilities Customer Care and Billing, but must be defined in the report.

How To Copy a Report Definition From the Demonstration Database

In order to use one of the sample reports in your Oracle Utilities Customer Care and Billing region, you must define the meta-data for the report. The demonstration database contains the report definition and all its related data for each sample report.

Refer to the Reports chapter of the Oracle Utilities Customer Care and Billing user guide for instructions on how to copy any / all of the report definitions from the demonstration database to your implementation's database.

Adding Custom Layout to Existing Reports in BI Publisher

The layout of the sample reports have been created in Microsoft Word using BI Publisher Desktop 11g plug-in. Custom Layouts can be created in BI Publisher. The name of the Custom layout can be specified in the Report Definition: Customer Specific Font/Layout. BI Publisher will then use this custom layout when the report is invoked from Oracle Utilities Customer Care and Billing.

Chapter 3

Additional Products

This chapter describes how you can install and integrate Oracle Utilities Customer Care and Billing with Oracle Documaker or DOC1. This chapter contains:

- [Using Oracle Documaker](#)
- [Using DOC1](#)

Using Oracle Documaker

Oracle Documaker enables Adobe's Portable Document Format (PDF) to be used for on-line viewing and Internet delivery of on-line bills and other documents. This section describes how Oracle Utilities Customer Care and Billing can be integrated with Documaker to allow Bills, Letters, Statements, Field Orders and Quotes to be viewed online.

This facility requires the Documaker software to already be installed. Documaker can be purchased and licensed separately from Oracle E-Delivery (<http://edelivery.oracle.com/>).

This section includes:

- [Supported Documaker Versions](#)
- [Supported Oracle Documaker Reports](#)
- [Installing and Integrating Documaker Templates with Customer Care and Billing](#)
- [Sample Directory Structure](#)
- [Sample Generated Ini File](#)
- [Documaker Integration](#)
- [Examples provided](#)

Supported Documaker Versions

At the time of release the supported versions for Customer Care and Billing Release 2.5.0.2 are:

Windows: Documaker 12.4

Linux: Documaker 12.4

Java Requirements for Documaker

Follow these steps to set up the required Java version for Documaker:

1. Make sure that the appropriate Java JRE 32-bit version 1.8 (Linux, HP, AIX, Windows) or Java JRE 32-bit version 1.7 (Solaris) is installed on the target environment.

-
2. Add the directory path to the JRE directories in the server's library path environment variable.
 - The library path is LD_LIBRARY_PATH for Solaris and Linux, and LIBPATH for AIX.
 - The path should also contain the libjvm.so DSO specific path. You may need to use a very specific path. See the following example:

If your current LD_LIBRARY_PATH contains:

```
/a01/documaker/jre/jdk1.8.0_40/jre/lib
```

You will need to add additional values, which are shown in bold in the example below. The following order is important:

```
LD_LIBRARY_PATH=/a01/documaker/bin/lib:/a01/documaker/bin:/a01/documaker/jre/jdk1.8.0_40/jre/lib/i386/server:/a01/documaker/jre/jdk1.8.0_40/jre/lib:/a01/documaker/jre/jdk1.8.
```

Supported Oracle Documaker Reports

The following Documaker online reports are supported for this release of CCB:

- C1-BL-DISP - Creates a PDF of bill image by calling Documaker.
- C1-QT-DISP - Creates a PDF of quote image by calling Documaker.
- C1-LT-DISP - Creates a PDF of letter image by calling Documaker.
- C1-ST-DISP - Creates a PDF of statement image by calling Documaker.
- C1-FO-DISP - Creates a PDF of field order image by calling Documaker.

Installing and Integrating Documaker Templates with Customer Care and Billing

Follow this process to integrate the supplied Documaker templates with your Oracle Utilities Customer Care and Billing installation and to configure your system:

1. Login to the target server hosting the environment that you are setting up for online image display.
2. Initialize the target environment

On Unix:

```
$SPLBASE/bin/splenvron.sh -e <SPLENVIRON>
```

On Windows:

```
%SPLBASE%\bin\splenvron.cmd -e <SPLENVIRON>
```

3. Edit template files to have the following exact values:

```
#> cat billdirfile.ini.template:
```

```
ONLINE BILL HOST=@ONLINE_DISPLAY_HOME@
ONLINE BILL TEMPLATE=@ONLINE_DISPLAY_HOME@@DIRSEP@CCB (Replace
AppFiles with CCB)
BILL EXTRACT PATH=@SPLOUTPUT@@DIRSEP@
BILL IMAGE PATH=@SPLBASE@@DIRSEP@splapp@DIRSEP@billView@DIRSEP@
BILL IMAGE
SCRIPT=@ONLINE_DISPLAY_HOME@@DIRSEP@CCB@DIRSEP@@DOC1BILLSCRIPT@
URL PREFIX=@WEB_CONTEXT_ROOT@/billView/
```

```
#> cat doc1dirfile.ini.template:
```

```
ONLINE DOC HOST=@ONLINE_DISPLAY_HOME@
ONLINE DOC TEMPLATE=@ONLINE_DISPLAY_HOME@@DIRSEP@CCB
DOC EXTRACT PATH=@SPLOUTPUT@@DIRSEP@
DOC IMAGE PATH=@SPLEBASE@@DIRSEP@splapp@DIRSEP@billView@DIRSEP@
DOC IMAGE
SCRIPT=@ONLINE_DISPLAY_HOME@@DIRSEP@CCB@DIRSEP@@DOC1SCRIPT@
URL_PREFIX=@WEB_CONTEXT_ROOT@/billView/
```

4. Add the following entries to the script `$SPLEBASE/bin/splenvron.sh`

```
# Setup display bill ini file - DOCUMAKER 12.4
BILLDISPINI=$SPLEBASE/etc/billdirfile.ini; export BILLDISPINI
DOCDISPINI=$SPLEBASE/etc/docldirfile.ini; export DOCDISPINI
ENVFILE=$SPLEBASE/etc/ENVIRON.INI; export ENVFILE
```

5. Declare the documaker base folder in the environment's ini file, `$SPLEBASE/etc/ENVIRON.INI`

```
ONLINE_DISPLAY_HOME=/spl/documaker12.4# Documaker 12.4 base folder
```

6. Edit the `ENVIRON.INI` file to add the location of the JRE 1.8 directories in the server's library path as described above in [Java Requirements for Documaker](#).

7. Initialize the environment to propagate the changes.

```
$SPLEBASE/bin/initialSetup.sh
```

8. Re-select the environment in SPL Menu options or re-load the environment variables.

```
$SPLEBASE/bin/splenvron.sh -e $SPLENVIRON
```

9. Run the `initialSetup` utility for the environment to generate the Oracle Utilities Customer Care and Billing related Documaker INI files:

On Unix:

```
$SPLEBASE/bin/initialSetup.sh
```

On Windows:

```
%SPLEBASE%\bin\initialSetup.cmd
```

10. Stop and start the environment:

On Unix:

```
$SPLEBASE/bin/spl.sh stop/start
```

On Windows:

```
%SPLEBASE%\bin\spl.cmd stop/start
```

11. Copy the templates jar file (`CCB-Unix.jar` or `CCB-Windows.jar`) to a temporary folder on the target server. This folder is referred to as `<TEMPDIR>` in the instructions below. If you are using FTP to transfer the file to a UNIX server, remember to use the `BINARY` option for the FTP transfer.

12. Decompress the jar file. The example below is for Unix. For Windows you will decompress `CCB-Windows.jar`:

```
cd <TEMPDIR>
jar -xvf CCB-Unix.jar
```

The CCB folder will be extracted.

Note: This release includes two Customer Care and Billing configurations for use with Documaker, one for flat file extracts and one for XML file extracts:

- **12.4 Flat** supports the flat format extract file for Bills and other extracts like Statement, Field Order, Quote and Letter.
 - **12.4 XML** supports the XML format extract file for Bills, and flat files for the other extracts noted above.
13. If one does not already exist, create a folder CCB under the Documaker host directory <ONLINE_DISPLAY_HOME>. Copy the contents of the appropriate CCB folder in the <TEMPDIR> to the CCB directory Documaker host directory on the target application server (see the section Software Requirements in the Oracle Utilities Customer Care and Billing Installation Guide for installation location). It should be at the same level as FAP folder.
 14. Ensure that the Oracle Utilities Customer Care and Billing Administrator user ID (typically cissys) has execute permissions to all files in the <ONLINE_DISPLAY_HOME>/FAP and <ONLINE_DISPLAY_HOME>/CCB folders.

Sample Directory Structure

Directory	Contents
<ONLINE_DISPLAY_HOME>/FAP	Documaker Binaries
<ONLINE_DISPLAY_HOME>/CCB	CCB templates and driver programs
<ONLINE_DISPLAY_HOME>/CCB/INPUT	CCB sample extracts
<ONLINE_DISPLAY_HOME>/CCB/DATA	CCB example PDFs

Sample Generated Ini File

The following files will be populated during the execution of the initialSetup utility:

billfiledirectory.ini

```
ONLINE BILL HOST=<ONLINE_DISPLAY_HOME>
ONLINE BILL TEMPLATE=<ONLINE_DISPLAY_HOME>/CCB
BILL EXTRACT PATH=<SPLOUTPUT>
BILL IMAGE PATH=<SPLEBASE>/splapp/billView/
BILL IMAGE SCRIPT=<ONLINE_DISPLAY_HOME>/CCB/_ccbPrint.sh
URL PREFIX=/spl/billView/
```

docfiledirectory.ini

```
ONLINE DOC HOST=<ONLINE_DISPLAY_HOME>
ONLINE DOC TEMPLATE=<ONLINE_DISPLAY_HOME>/CCB/
DOC EXTRACT PATH=<SPLOUTPUT>
DOC IMAGE PATH=<SPLEBASE> /splapp/billView/
DOC IMAGE SCRIPT=<ONLINE_DISPLAY_HOME>CCB/_ccbPrintDoc.sh
URL PREFIX=/spl/billView/
```

Documaker Integration

This section describes using Oracle Documaker to display Bills, Letters, Statements, Field Orders and Quotes. This section includes:

- [On-line Bill Display Components](#)
- [On-line Quote Display Components](#)
- [On-line Letter Display Components](#)

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- [Statement Display Components](#)
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On-line Bill Display Components

The on-line bill display process requires the following components:

Plug-in Spot: Installation - Online Bill Display

The plug-in spot is used to generate a Bill Image.

Algorithm Type: Create PDF of bill image by calling Documaker (C1-BL-DISP)

An algorithm based on algorithm type C1-BL-DISP (CIPBBLDX) for on-line bill display using Documaker is triggered when the Display Bill action button on the Bill Maintenance window is invoked. This algorithm is responsible for calling the bill extract program and passing the bill information flat file to the Bill Image Generator script to create a bill image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the bill image.

To make this program flexible, its configurable parameters are stored in an INI file. The full path of the INI file is defined by the BILLDISPINI environment variable.

This program utilizes the INI file to determine the target location for the bill extract program and the location of the bill image generator script (see below).

To activate this algorithm, within the application the following steps have to be executed by someone having access to the admin tables, that knows how to set-up and define algorithms. (See also the Business Process Guide on Algorithms)

1. Create an algorithm with the following values:
 - Algorithm code: CM-BL-DISP
 - Description: Online Bill Display
 - Algorithm Type: C1-BL-DISP
 - Parameter
 - Bill Route Type
2. In the Oracle Customer Care and Billing Application, navigate to the Installation Algorithm screen and add an Installation Algorithm with the following values (this will create a row on the CI_INSTALL_ALG table):
 - INS_ALG_ENTITY_FLG: ONBD
 - SEQ_NUM: 1
 - ALG_CD: CM-BL-DISP
 - VERSION: 1

Bill Image Generator Script

The Bill Image Generator script `_ccbPrint.sh` or `_ccbPrint.cmd` is invoked by the bill print extract algorithm. The call parameters are based on the contents of the `billfiledirectory.ini` file identified through the BILLDISPINI environment variable. This script validates the input parameters passed to it, sets the environment variables for input file, output file and log file and calls the main driver `BillRun.sh` / `BillRun.cmd`. The driver file will in turn call the Oracle Documaker scripts. The output from this process as well as the PDF file are placed in the appropriate directory from the `billfiledirectory.ini` file where it can be picked up by the application and displayed in the user's browser (usually `$SPLEBASE/splapp/billView` or `%SPLEBASE%\splapp\billView` folder).

The path for the input and output files is specified in the `fsisys.ini` file and Documaker reads the INI file option values in lower case. There will be an error in UNIX if the path for the input/output files has directory/file names not in lower case. To avoid this error, the input file will be copied to an intermediate file with the input file name in lower case in `documaker/12.4/12.4-Flat/`

CCB/data folder and documaker/12.4/12.4-XML/CCB/data folder, and the output file from the same data folder will be copied to the original output directory specified in the billfiledirectory.ini file.

BILLDISPINI environment variable

The full path location of the billfiledirectory.ini is contained in the BILLDISPINI environment variable (typically <SPLEBASE>/etc directory).

The billfiledirectory.ini File

The billfiledirectory.ini file is used by the Bill Print Algorithm to render the bill image.

The INI file contains the following externalized parameters:

- **ONLINE BILL HOST**=<Oracle Documaker Host Path> - This parameter defines where Oracle Documaker is installed. Value typically <DOCHOSTDIR> (note that FAP will be a subfolder)
- **ONLINE BILL TEMPLATE**=<Oracle Documaker Template Path> - This parameter defines the location of Oracle Documaker's template. Value typically <DOCHOSTDIR>/CCB
- **BILL EXTRACT PATH**=<Bill Extract Output Path> - This parameter defines the location where the bill print extract program creates its flat file output. Value Typically <SPLOUTPUT>
- **BILL IMAGE PATH**=<Full PDF Path> - This parameter defines the location where Documaker creates the bill image PDF file. Value typically <SPLEBASE>/splapp/billView The Documaker log files for a specific report is also in this directory.
- **BILL IMAGE SCRIPT**= <Bill Image Generator Script with full path> - This parameter defines the location of the script that invokes Oracle Documaker to generate the PDF file from the extract file. <DOCHOSTDIR>/CCB/_ccbPrint.sh or _ccbPrint.cmd
- **URL PREFIX**=<URL Prefix> - This parameter defines the prefix that will be affixed to the PDF filename in order to compose its full URL when displayed. This value dependant on the application middleware (WebLogic, WebSphere)

On-line Quote Display Components

Plug-in Spot: Installation - Online Quote Display

The plug-in spot is used to generate a Quote Image.

Algorithm Type: Create PDF of Quote image by calling Documaker (C1-QT-DISP)

An algorithm based on algorithm type C1-QT-DISP (CIPCQTDX) for on-line quote display using Documaker is triggered when the Display Quote action button on the Quote Maintenance window is invoked. This algorithm is responsible for calling the quote extract program and passing the quote information flat file to the Document Image Generator script to create a quote image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the quote image.

To make this program flexible, its configurable parameters are stored in an INI file. The full path of the INI file is defined by the DOCDISPINI environment variable.

This program utilizes the INI file to determine the target location for the quote extract program and the location of the document image generator script (see below).

To activate this, a new algorithm of this type should be created and should be plugged from the Installation Options.

Document Image Generator Script

The Document Image Generator script _ccbPrintDoc.sh or _ccbPrintDoc.cmd is invoked by the various document extract algorithms. The call parameters are based on the contents of the docfiledirectory.ini file identified through the DOCDISPINI environment variable. This script

validates the input parameters passed to it, sets the environment variables for input file, output file and log file and calls the main driver depending on the document type. The driver file will in turn call the Oracle Documaker scripts. The output from this process as well as the PDF file are placed in the appropriate directory from the docfiledirectory.ini file where it can be picked up by the application and displayed in the user's browser (usually \$SPLEBASE/splapp/billView or %SPLEBASE%\splapp\billView folder).

The path for the input and output files is specified in the fsisys.ini file and Documaker reads the INI file option values in lower case. There will be an error in UNIX if the path for the input/output files has directory/file names not in lower case. To avoid this error, the input file will be copied to an intermediate file with the input file name in lower case in documaker/12.4/12.4-Flat/CCB/data folder and documaker/12.4/12.4-XML/CCB/data folder, and the output file from the same data folder will be copied to the original output directory specified in the docfiledirectory.ini file.

DOCDISPINI environment variable

The full path location of the docfiledirectory.ini is contained in the DOCDISPINI environment variable (typically <SPLEBASE>/etc directory).

The docfiledirectory.ini File

The docfiledirectory.ini file is used by the various Document Print Algorithms to render the document image.

The INI file contains the following externalized parameters:

- ONLINE DOC HOST=<Oracle Documaker Host Path> - This parameter defines where Oracle Documaker is installed. Value typically <DOCHOSTDIR> (note that FAP will be a subfolder)
- ONLINE DOC TEMPLATE=<Oracle Documaker Template Path> - This parameter defines the location of Oracle Documaker's template. Value typically <DOCHOSTDIR>/CCB
- DOC EXTRACT PATH=<Document Extract Output Path> - This parameter defines the location where the various document print extract programs create their flat file output. Value Typically <SPLOUTPUT>
- DOC IMAGE PATH=<Full PDF Path> - This parameter defines the location where Documaker creates the document image PDF file. Value typically <SPLEBASE>/splapp/billView The Documaker log files for a specific report is also in this directory.
- DOC IMAGE SCRIPT= <Document Image Generator Script with full path> - This parameter defines the location of the script that invokes Oracle Documaker to generate the PDF file from the extract file. <DOCHOSTDIR>/CCB/_ccbPrintDoc.sh or _ccbPrintDoc.cmd
- URL PREFIX=<URL Prefix> - This parameter defines the prefix that will be affixed to the PDF filename in order to compose its full URL when displayed. This value dependant on the application middleware (WebLogic, WebSphere)

On-line Letter Display Components

Plug-in Spot: Installation - Online Letter Image

The plug-in spot is used to generate a Letter Image.

Algorithm Type: Create PDF of Letter image by calling Documaker (C1-LT-DISP)

An algorithm based on algorithm type C1-LT-DISP (CIPCLTDX) on-line letter display using Documaker is triggered when the Display Letter action button on the Customer Contact Maintenance window is invoked. This algorithm is responsible for calling the letter extract program and passing the letter information flat file to the Document Image Generator script to create a letter image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the letter image.

To make this program flexible, its configurable parameters are stored in an INI file. The full path of the INI file is defined by the DOCDISPINI environment variable.

This program utilizes the INI file to determine the target location for the letter extract program and the location of the document image generator script.

To activate this, a new algorithm of this type should be created and should be plugged from the Installation Options.

Statement Display Components

Plug-in Spot: Installation - Online Statement Image

The plug-in spot is used to generate a Statement Image.

Algorithm Type: Create PDF of Statement image by calling Documaker (C1-ST-DISP)

An algorithm based on algorithm type C1-ST-DISP (CIPBSTDX) for on-line Statement display using Documaker is triggered when the Display Statement action button on the Statement Maintenance window is invoked. This algorithm is responsible for calling the Statement extract program and passing the Statement information flat file to the Document Image Generator script to create a Statement image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the Statement image.

To make this program flexible, its configurable parameters are stored in an INI file. The full path of the INI file is defined by the DOCDISPINI environment variable.

This program utilizes the INI file to determine the target location for the Statement extract program and the location of the document image generator script.

To activate this, a new algorithm of this type should be created and should be plugged from the Installation Options.

On-line Field Order Display Components

Plug-in Spot: Installation - Online Field Order Image

The plug-in spot is used to generate a Field Order Image.

Algorithm Type: Create PDF of Field Order image by calling Documaker (C1-FO-DISP)

An algorithm based on algorithm type C1-FO-DISP (CIPOFODX) for on-line Field Order display using Documaker is triggered when the Display Field Order action button on the Field Order Maintenance window is invoked. This algorithm is responsible for calling the Field Order extract program and passing the Field Order information flat file to the Document Image Generator script to create a Field Order image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the Field Order image.

To make this program flexible, its configurable parameters are stored in an INI file. The full path of the INI file is defined by the DOCDISPINI environment variable.

This program utilizes the INI file to determine the target location for the Field Order extract program and the location of the document image generator script.

To activate this, a new algorithm of this type should be created and should be plugged from the Installation Options.

Examples provided

Examples to test the installation, infrastructure are provided in the following directory:

/CCB/input/examples

Review the sample scripts samplebill.sh/.cmd to generate an online bill without the GUI and sampleltr.sh/.cmd for online letters.

The generated PDF file will be created in .../CCB/data folder. The output from the Oracle Documaker generation process will also be copied to this directory.

Using DOC1

Oracle Utilities Customer Care and Billing provides support for Pitney Bowes DOC1 for online/batch printing and online display, viewing of bills, letters, field orders, statements and quotes.

Please note that implementations can use either Oracle Documaker or DOC1 for their printing and display needs.

Supported DOC1 Version

At the time of release the supported version for Customer Care and Billing Release 2.5.0.2 is:

Windows and Linux: DOC1 6.4.1.38

Prerequisite

Do not install DOC1 6.4.1.38 if Documaker 12.x already exists or installed on the same machine.

Configuring DOC1

1. Copy the Generate installer to DOC1 6.4.1.38 folder on the desired server.
Download the DOC1 software from the Pitney Bowes website.

2. Uncompress the files to designated Generate folder.

Refer to folder hierarchy in Unix:

- <SPL_BASE_FOLDER>/doc1_v6.4 > AppFiles
- <SPL_BASE_FOLDER>/doc1_v6.4 > generate

NOTE: Make sure you uncompress the contents under generate folder.
Create the generate folder if does not exists.

Unix:

```
cd <CCB_BASE_FOLDER>/doc1_v6.4/  
unzip Generate_6.4Maint-lnx64-6.4.1.38.zip  
cd "Generate Windows and UNIX 6.4 Maintenance 6.4.1.38"/lnx64/  
cp -rp doc1lnx64host.tar <CCB_BASE_FOLDER>/doc1_v6.4/generate  
cd <CCB_BASE_FOLDER>/doc1_v6.4/generate  
tar xvf doc1lnx64host.tar
```

Windows:

3. Uncompress using WinZip or 7zip to C:\spl\DOC1\generate
4. Download the CCB configuration files from SVN and save it under DOC1 6.4.1.38 folder.
AppFiles should be at the same folder level of generate folder.

e.g. **Unix:** /scratch/CCB/doc1_v6.4/AppFiles

Windows: C:\spl\DOC1\AppFiles

NOTE: For Unix, make sure that you rename the AppFiles-Unix to AppFiles

5. Ensure that FW_template_structure.xml under \$\$SPLEBASE/structures has this entry.

```
<billdirfile.ini.template>  
<dest_files>  
<dest_file_1>@SPLEBASE@/etc/billdirfile.ini</dest_file_1>  
</dest_files>  
</billdirfile.ini.template>  
<doc1dirfile.ini.template>  
<dest_files>  
<dest_file_1>@SPLEBASE@/etc/doc1dirfile.ini</dest_file_1>  
</dest_files>  
</doc1dirfile.ini.template>
```

6. Ensure that these two template files exists under \$\$SPLEBASE/etc folder

billdirfile.ini.template

docldirfile.ini.template

7. Ensure that the above templates files have the exact value

```
#> cat billdirfile.ini.template
ONLINE BILL HOST=@ONLINE_DISPLAY_HOME@
ONLINE BILL TEMPLATE=@ONLINE_DISPLAY_HOME@@DIRSEP@AppFiles
BILL EXTRACT PATH=@SPLOUTPUT@@DIRSEP@
BILL IMAGE
PATH=@SPLEBASE@@DIRSEP@splapp@DIRSEP@billView@DIRSEP@
BILL IMAGE
SCRIPT=@ONLINE_DISPLAY_HOME@@DIRSEP@AppFiles@DIRSEP@@DOC1BILLSSCRIPT@
URL PREFIX=@WEB_CONTEXT_ROOT@/billView/

#> cat docldirfile.ini.template
ONLINE DOC HOST=@ONLINE_DISPLAY_HOME@
ONLINE DOC TEMPLATE=@ONLINE_DISPLAY_HOME@@DIRSEP@AppFiles
DOC EXTRACT PATH=@SPLOUTPUT@@DIRSEP@
DOC IMAGE PATH=@SPLEBASE@@DIRSEP@splapp@DIRSEP@billView@DIRSEP@
DOC IMAGE
SCRIPT=@ONLINE_DISPLAY_HOME@@DIRSEP@AppFiles@DIRSEP@@DOC1SCRIPT@
URL PREFIX=@WEB_CONTEXT_ROOT@/billView/
```

8. Ensure that the entries below to the script `$$PLEBASE/bin/splenvron.sh` exists

```
# Setup display bill ini file - DOC1
ONLINEBILLINI=$$PLEBASE/etc/billdirfile.ini; export
ONLINEBILLINI
ONLINEDOCINI=$$PLEBASE/etc/docldirfile.ini; export ONLINEDOCINI
ENVFILE=$$PLEBASE/etc/ENVIRON.INI; export ENVFILE
```

9. Declare the DOC1 6.4.1.38 base folder in the environment's ini file, `$$PLEBASE/etc/ENVIRON.INI`

```
ONLINE_DISPLAY_HOME=/scratch/CCB/doc1_v6.4# DOC1 6.4.1.38 base
folder
```

10. Create the billView folder under `$$PLEBASE/splapp`

```
#> mkdir billView
#> chmod 777 billView
```

11. Update the license code of DOC1 6.4.1.38, keycode.ops, located under `$$DOC1HOSTDIR/AppFiles`, e.g. `/scratch/CCB/doc1_v6.4/AppFiles`

```
Enter all necessary information.
#> vi keycode.ops
```

NOTE: License code is different for each OS platform.

12. Initialize the environment to propagate the changes:

```
#> $$PLEBASE/bin/initialSetup.sh
#> %$PLEBASE%\bin\initialSetup.cmd
```

13. Re-select the environment in SPL Menu options or re-load the environment variables

```
#> $$PLEBASE/bin/splenvron.sh -e $$PLENVIRON
```

14. Re-start the CCB application / environment.

```
#> spl.sh -a stop
#> spl.sh -a start
```