

Oracle Public Sector Revenue Management

Optional Products Installation Guide

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Oracle Public Sector Revenue Management Optional Products Installation Guide

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Preface

This guide provides instructions for installing and configuring optional products that can be used with Oracle Public Sector Revenue Management.

Audience

Optional Products Installation Guide is intended for anyone who needs to install and configure optional products such as Oracle BI Publisher or Oracle Documaker for Oracle Public Sector Revenue Management

Related Documents

For more information, refer to these Oracle documents:

Installation Guides and Release Notes

- *Oracle Public Sector Revenue Management v2.5.0.1.0 Release Notes*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Quick Install Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Installation Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Database Administrator's Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Optional Products Installation Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 License Information User Guide*

Administrative and Business User Guides

- *Oracle Public Sector Revenue Management v2.5.0.1.0 Administrative User Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Business User Guide*

Supplemental Documents

- *Oracle Public Sector Revenue Management v2.5.0.1.0 Server Administration Guide*
- *Oracle Public Sector Revenue Management v2.5.0.1.0 Security Guide**Oracle Public Sector Revenue Management*

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

Reports Configuration for Oracle BI Publisher

This section describes the steps required to configure Oracle Public Sector Revenue Management (PSRM) and Oracle BI Publisher to support a reporting solution that uses Oracle BI Publisher, including:

- [Installing Oracle BI Publisher Enterprise](#)
- [Deploying Reports into BI Publisher Enterprise](#)

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 Public Sector Revenue Management system

Oracle BI Publisher is available on the Oracle Technology Network web site at the following location:

<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

This document 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.

Version Note: We used Oracle BI Publisher 11.1.1.7.0 on Windows and Unix server for running reports on the web.

Deploying Reports into BI Publisher Enterprise

This section describes the steps needed to deploy delivered reports into your BI publisher environment, including:

- [Set Up a Data Source for the PSRM Database](#)
- [Deploying Reports into BI Publisher Enterprise](#)
- [Updating Default Data Source](#)

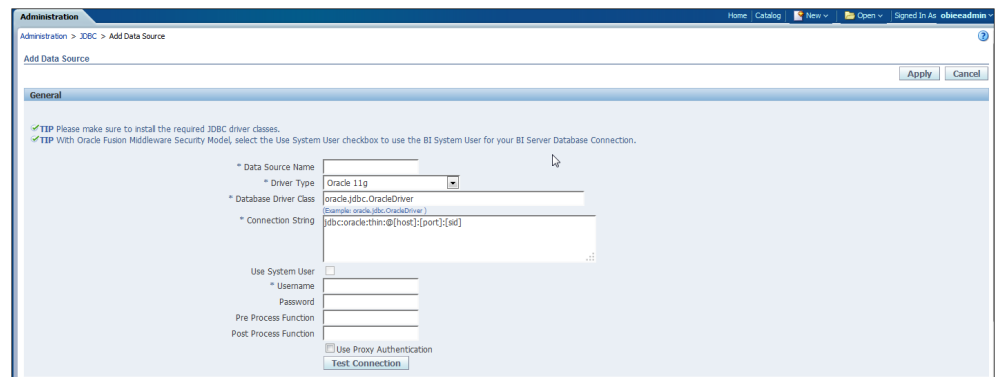
Set Up a Data Source for the PSRM Database

To run the reports in BI publisher you must set up a data source for PSRM. The default data source used by the delivered reports is named “OTA-ETPM”. If you choose to use different name for the data source you must update the data source for each of the data models. See **Updating Default Data Source** on page 1-3 for more information.

To Set Up a Data Source

1. Log in to BI publisher as an admin user and navigate to **Administration, Data Sources, JDBC Connection**.
2. On the JDBC connection page, go to the JDBC tab and click **Add Data Source** to add a new data source for the PSRM database.
3. On the Add Data Source page enter all the required information.
4. Click **Apply** to create the new data source.

An example of the Add Data Source page:



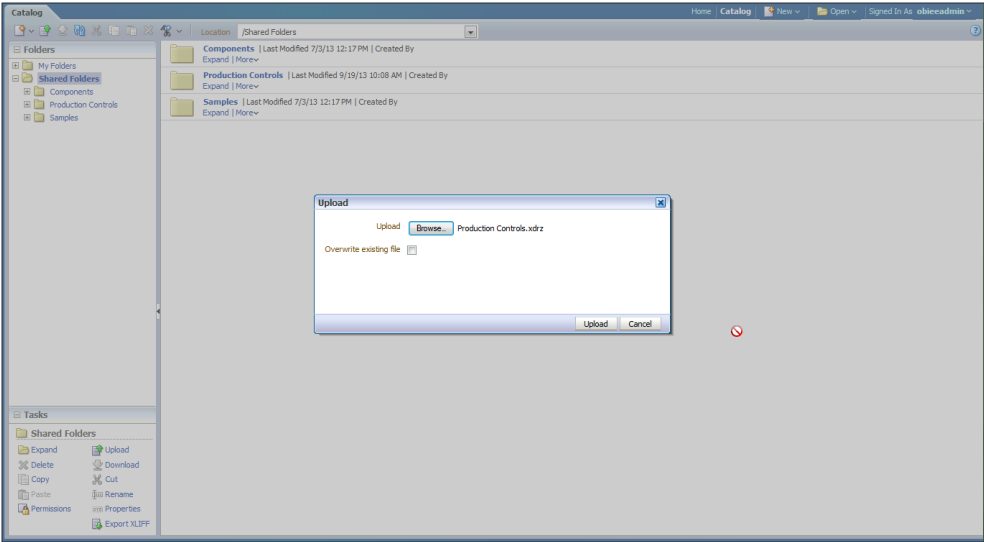
Deploying Reports into BI Publisher Enterprise

The reports are delivered in a zip file named “Production Controls.xdrz” that is located in the BI-Publisher-Reports folder of the install package. Copy this zip file to your local desktop.

To Deploy the Reports

1. Log in to BI Publisher Enterprise as admin user and navigate to the Catalog page.
2. Under **Folders**, click on **Shared Folders**.
3. Under **Tasks**, click **Upload**.
4. In the **Upload** window, click **Browse** and navigate to the folder on your desktop where you downloaded the reports zip file.
5. Select the Production Controls.xdrz file and click **Upload** to upload the reports.

An example of the Upload page:



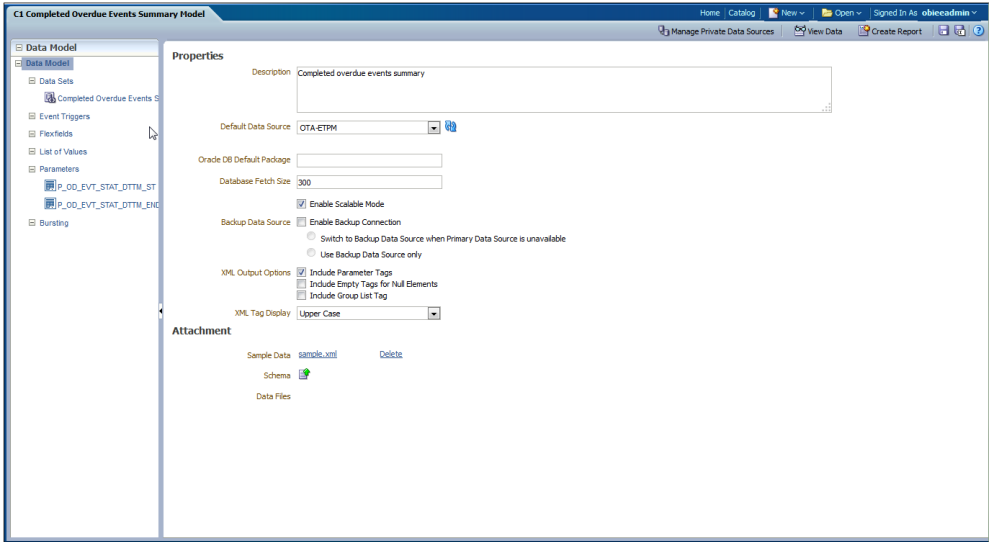
Updating Default Data Source

The data models are configured to use the “OTA-ETPM” data source. If you choose a different name for your PSRM data source you must update each of the data models to the new data source. This should be done after deploying the reports into BI Publisher Enterprise.

To Update the Default Data Source

1. Navigate to **Catalog, Shared folders, Production Controls, Data Models**.
2. Click on the data model and open in edit mode.
3. On the edit page, choose the correct data source from the Default Data Source drop down.
4. Click **Save** to update the data source.

An example Data Model Edit page:



Chapter 2

On-Line Document Display and Batch Document Integration with Oracle Documaker

Oracle Documaker enables Adobe's Portable Document Format (PDF) to be used for on-line viewing and Internet delivery of on-line letter documents. This section describes how Oracle Public Sector Revenue Management can be integrated with Documaker to enable letters to be viewed online.

Documaker can also be used to generate letters using Oracle Public Sector Revenue Management's batch functionality. To configure this functionality, make sure that the batch job used to produce letters references the appropriate file path as configured by an implementation.

The Documaker software must be purchased and installed separately. Documaker can be purchased and licensed separately from the Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>).

This section includes the following topics:

- [Supported Documaker Versions](#)
- [Supported Oracle Documaker Templates](#)
- [Installing and Integrating Documaker Templates with PSRM](#)
- [Oracle Documaker Integration](#)

Supported Documaker Versions

At the time of release the supported version for Oracle Public Sector Revenue Management is Documaker 12.3.

Supported Oracle Documaker Templates

Oracle Public Sector Revenue Management includes a sample algorithm to extract data for letters to integrate with Documaker. Refer to **Defining Taxpayer Options > Setting Up Customer Contact Options > Letter Printing** in the Oracle Public Sector Revenue Management Administration Guide of the online help for more information.

Installing and Integrating Documaker Templates with PSRM

Follow this procedure to integrate the supplied Documaker templates with your PSRM installation and to configure your system:

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

On Unix:

```
$SPLEBASE/bin/splenviron.sh -e <SPLENVIRON>
```

On Windows:

```
%SPLEBASE%\bin\splenviron.cmd -e <SPLENVIRON>
```

3. Add the following environmental variables:

Environment Variable	Description
DOCDISPINI	Location of the ini file. Should be set to \$SPLEBASE/etc/doc1dirfile.ini
DOCHOSTDIR	The value of DOCHOSTDIR should be set to the location where Documaker has been installed. Example Value: /ouaf/documaker/rel120
DOCPATH	Location where the generated files from the batch are located. Example Value: /ouaf/sploutput/V25010_PSRM

You can add these environment variables by using the `cmenv.sh/cmenv.cmd` exit as documented in the OUAF Technical Best Practices Guide:

Example for Unix:

```
$SPLEBASE/scripts/cm
#> cat cmenv.sh
DOCDISPINI=$SPLEBASE/etc/doc1dirfile.ini; export DOCDISPINI
DOCHOSTDIR=/ouaf/documaker/rel120; export DOCHOSTDIR
DOCPATH=/ouaf/sploutput/V25010_PSRM; export DOCPATH
```

Example for Windows:

```
%SPLEBASE%/scripts/cm
#> type cmenv.cmd
SET DOCDISPINI=%SPLEBASE%\etc\doc1dirfile.ini
SET DOCHOSTDIR=C:\ouaf\documaker\rel120
SET DOCPATH=C:\ouaf\sploutput\V25010_PSRM
```

4. Run the `initialSetup` utility for the environment to generate the Oracle Public Sector Revenue Management related Documaker INI files:

On Unix:

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

On Windows:

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

5. Stop and start the environment:

On Unix:

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

On Windows:

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

6. Copy the file PSRM-<OS>.jar to a temporary folder (referred to hereafter as <TEMPDIR>) on the target server. If you are using FTP to transfer this file to a UNIX server, remember to use the BINARY option for the FTP transfer.

Note: For Unix, copy the PSRM-Unix.jar.

For Windows, copy the ETP-Windows.jar

7. Decompress the file:

```
cd <TEMPDIR>
jar -xvf PSRM--<OSplatform>.jar
```

On Unix:

```
find . -type f | xargs chmod 750
```

The ETM folder will be extracted.

8. If one does not already exist, create a folder named “etm” under the Oracle Documaker host directory <DOCHOSTDIR>. Copy the contents of the appropriate etm folder in the <TEMPDIR> to the etm directory Oracle Documaker host directory on the target application server (see the section Software Requirements in the Oracle Public Sector Revenue Management Installation Guide for installation location).

It should be at the same level as the fap folder (the Documaker installation location).

Note: Your installation needs to look like the following:

```
<$DOCHOSTDIR>/etm:
```

```
|-- etm
|  |-- data
|  |-- deflib
|  |-- forlib
|  |-- forms
|  |-- input
|  `-- table
|-- fap
```

9. Make sure that the Oracle Public Sector Revenue Management Administrator user ID (typically cissys) has execute permissions to all files in the <DOCHOSTDIR>/fap and <DOCHOSTDIR>/etm folders.

Sample Directory Structure

Directory	Contents
<DOCHOSTDIR>/fap	Documaker Binaries
<DOCHOSTDIR>/etm	PSRM templates and driver programs
<DOCHOSTDIR>/tax/input/examples	PSRM example PDFs

Sample Generated Ini File

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

Example on Unix: doc1dirfile.ini

```

ONLINE DOC HOST=/ouaf/documaker/re1120
ONLINE DOC TEMPLATE=/ouaf/documaker/re1120/etm
DOC EXTRACT PATH=/ouaf/sploutput/V25010_PSRM/
DOC IMAGE PATH=/ouaf/V25010_PSRM /splapp/billView/
DOC IMAGE SCRIPT=/ouaf/documaker/re1120/etm/_ccbPrintDoc.sh
URL PREFIX=/ouaf/billView/

```

Oracle Documaker Integration

This section describes the Oracle Public Sector Revenue Management components that are used for displaying letters using Oracle Documaker.

Oracle Documaker Algorithm

The base product provides an installation algorithm plug-in spot called Online Letter Image. This plug-in spot should contain an algorithm that invokes the Create PDF of Letter image by calling Oracle Documaker.

Oracle Public Sector Revenue Management provides an algorithm type and a corresponding algorithm called C1-LT-DISP, which invokes Oracle Documaker. This algorithm is responsible for calling the letter extract program and passing the letter information flat file to the document image generator script defined in the documentation ini file 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 use the base algorithm, navigate to **Installation Options - Framework** and add an entry to the algorithm collection with an algorithm entity of Online Letter Image and the algorithm C1-LT-DISP.

Appendix A

License and Copyright Notices

For license and copyright information for associated products, see the *Oracle Public Sector Revenue Management License Information User Manual*.