

# Legal Notices

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## Introduction

Oracle Insurance Policy Administration (OIPA) provides users with the ability to dynamically generate documents in PDF format. Transactions that are configured with an attached GenerateDocument business rule can access OIPA data to generate a dynamic document.

The document generating system uses Crystal Reports version 12. The standard Crystal Reports report file, which has the .rpt file extension, is used as the document template. Each individual transaction can be configured to use a specific template.

A web service, DocumentGenerator, is used by OIPA to process the document generator. The DocumentGenerator WSDL can be accessed by entering the server name and port for OIPA in the address below, assuming application context name is PASJava in the below URL.

<http://<OIPA-SERVER:PORT>/PASJava/DocumentGenerator?wsdl>

**Note:** Important: Since the Document Generator uses Crystal Reports, appropriate licenses and media must be obtained from the vendor prior to proceeding.

## Customer Support

If you have any questions about the installation or use of our products, please visit the My Oracle Support website: <https://support.oracle.com>, or call (800) 223-1711.

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or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Installation

### Directory Structure

Two directories must be created: one to store the templates and one for the generated documents. Each of these directories must be accessible by the application server and OIPA instance. In the example below, the Documents directory is used to store the document templates, while the GeneratedDocuments directory is used to store the generated documents.

Example:

```
document.documentPath=/opt/Oracle/OIPA/Documents
```

```
document.generatedDocumentRootPath=/opt/Oracle/OIPA/GeneratedDocuments
```

### Required Libraries

OIPA expects crystal runtime libraries for Document Generator functionality. Below listed libraries from **crjava-runtime\_12.2.219.zip** must be placed in the class loader of the application server. Each of these files is included with Crystal Reports and not included with OIPA.

commons-collections-3.1.jar	commons-configuration-1.2.jar	commons-logging.jar	commons-lang-2.1.-jar
CrystalCommon2.jar	CrystalReportsRuntime.jar	DatabaseConnectors.jar	log4j.jar
logging.jar	icu4j.jar	JDBInterface.jar	keycodeDecoder.jar

### Configuration Files

The CRConfig.xml configuration file is required for Crystal Reports and is included within the OIPA .war file.

### OIPA Properties File

The OIPA configuration file, PAS.properties and Cycle.properties for cycle web, must be modified to include the necessary configuration. Refer to the System Properties document in the Oracle Insurance Policy Administration 10.2.2.0 documentation library published on the Oracle Technology Network (OTN) for additional information on the PAS.properties file.

document.crystalConnectionCount	Maximum concurrent connections
document.documentPath	The path of the document template directory
document.generatedDocumentRootPath	The path of the directory used to store generated documents.
document.documentGeneratorUrl	The address of the DocumentGenerator WSDL.

Example:

```
document.crystalConnectionCount=1
```

```
document.documentPath=/opt/Oracle/OIPA/Documents
```

```
document.generatedDocumentRootPath=/opt/Oracle/OIPA/GeneratedDocuments
```

```
document.documentGeneratorUrl=http://localhost:8080/PASJava/DocumentGenerator?wsdl
```

## Using the Document Generator

### Configure in the Rules Palette

After the installation steps are complete, the Rules Palette provides the tools to configure the necessary components of the Document Generator. The following configuration requirements are necessary to implement this functionality.

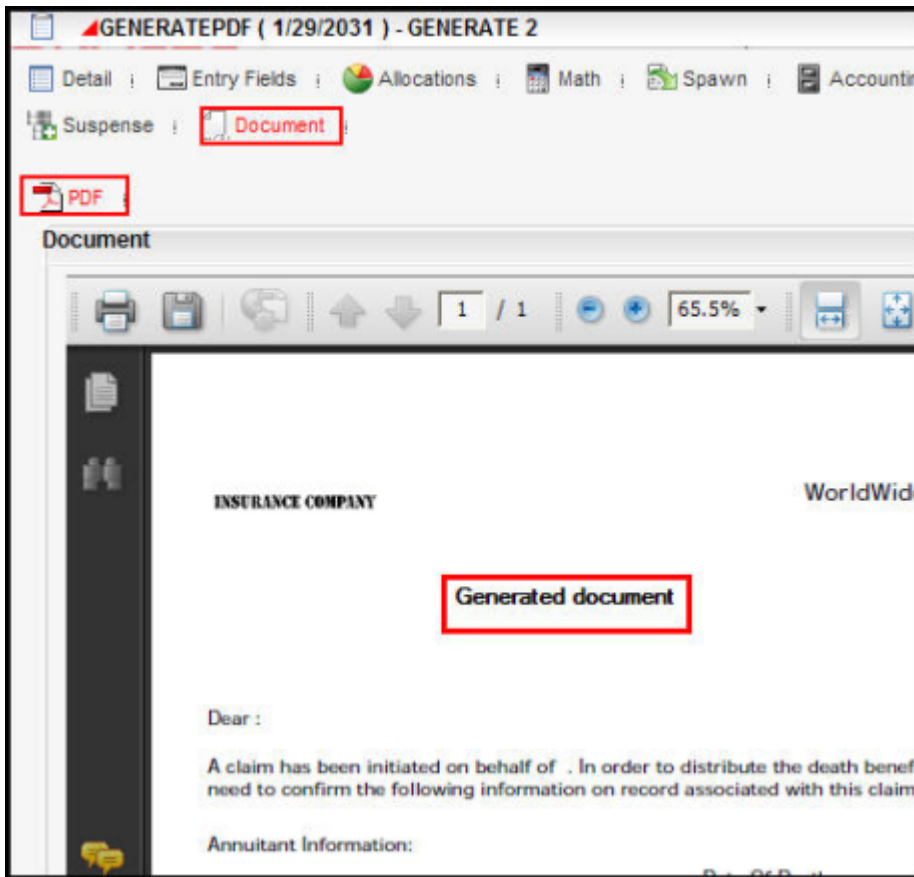
- » A transaction configured to generate a PDF file.
- » **ExternalProcess** rule attached to the transaction. This rule is configured to trigger the **GenerateDocument** rule.
- » **GenerateDocument** business rule overridden at the transaction level. This rule is not listed in the TransactionBusinessRulePacket for GeneratePDF. GenerateDocument calls a template that is located on the server to dynamically generate a PDF file based on input gathered from a SQL query in the GenerateDocument rule.
- » File template added to the server at the path specified in the **PAS.properties** file. This file name should match the name specified in the **GenerateDocument** configuration. This was added during the installation process described earlier in this document.

**Note:** Refer to the Rules Palette help system for complete instructions on configuring the Document Generator. This information can be found under **Main Explorer Folders | Prototypes | Previous Release Prototype Samples | View PDF Documents**. The help is located inside the Rules Palette application. Click the Help option on the Main menu to reveal the link to the help.

### Generate Documents in OIPA

When the components of the Document Generator are properly configured in the Rules Palette, an OIPA user can generate a document by simply adding the PDF generating activity to the Activity screen and then processing it. Once the activity is active, the user may click the Activity Detail icon to the left of the activity. The Activity window will open. A Document link should be visible along the top of the window.

**Note:** Refer to the OIPA help system for complete instructions on working with PDF generating activities. The help is located in the Oracle Insurance Policy Administration 11.0.0.0 documentation library on OTN.



Activity Window in OIPA with Document Link

