

Oracle Financial Services Lending and Leasing

Generating Letters & Correspondence with PDF Template

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Overview

This document outlines the generation of Oracle Financial Services Lending and Leasing Correspondence/Letters/Reports by embedding Lender Data into published Standard PDF Templates.

Prerequisites

- Use Adobe Acrobat Professional to embed Lender Data into Standard PDF template.
- BI Publisher supports Adobe Acrobat 5.0 and above versions for updating the template.

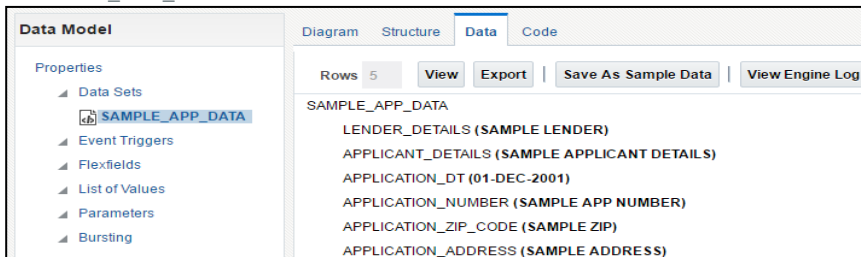
Create Data Model:

- Create data model in BI Publisher to get data elements from Oracle Financial Services Lending and Leasing.

For this example we have created Data Model using Sample XML given below

Sample Data Model

```
<?xml version="1.0"?>
<SAMPLE_APP_DATA>
  <LENDER_DETAILS>SAMPLE LENDER</LENDER_DETAILS>
  <APPLICANT_DETAILS>SAMPLE APPLICANT DETAILS</APPLICANT_DETAILS>
  <APPLICATION_DT>01-DEC-2001</APPLICATION_DT>
  <APPLICATION_NUMBER>SAMPLE APP NUMBER</APPLICATION_NUMBER>
  <APPLICATION_ZIP_CODE>SAMPLE ZIP</APPLICATION_ZIP_CODE>
  <APPLICATION_ADDRESS>SAMPLE ADDRESS</APPLICATION_ADDRESS>
</SAMPLE_APP_DATA>
```

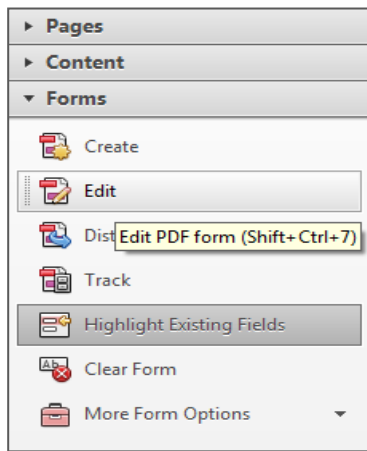


Process to embed lender data into standard PDF Template

- The following figure shows a sample published standard PDF template for “Housing Counseling Agencies Notice”.

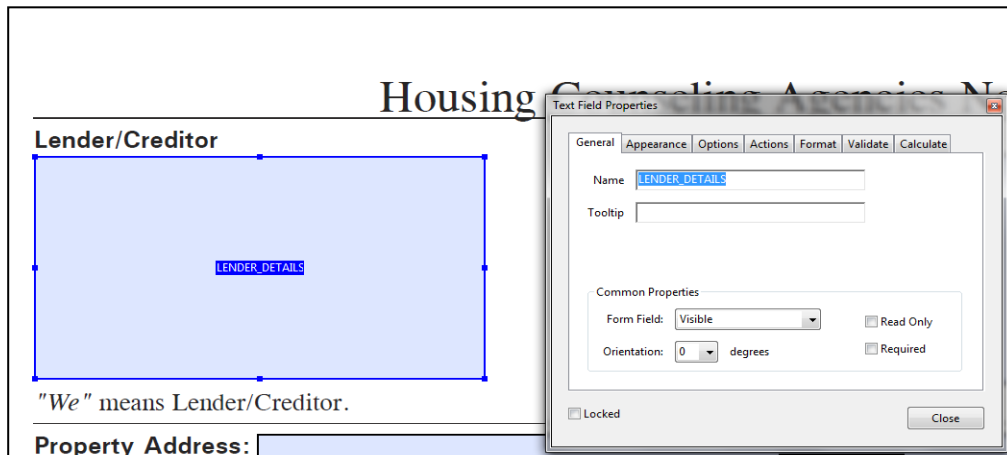
| Housing Counseling Agencies Notice | | |
|--|--------------------|--------------------------------|
| Lender/Creditor | Applicant/Consumer | Date |
| | | Application or Loan Number |
| | | 10 Closest Results to Zip Code |
| "We" means Lender/Creditor. "You" means Applicant/Consumer. | | |
| Property Address: | | |
| Housing Counselors Near You | | |
| The counseling agencies on this list are approved by the U.S. Department of Housing and Urban Development ("HUD"), and they can offer independent advice about whether a particular set of mortgage loan terms is a good fit based on your objectives and circumstances, often at little or no cost to you. This list shows you several approved agencies in your area. You can find other approved counseling agencies at the Consumer Financial Protection Bureau's ("CFPB") website: consumerfinance.gov/mortgagehelp or by calling 1-855-411-CFPB (2372). You can also access a list of nationwide HUD-approved counseling intermediaries at http://portal.hud.gov/hudportal/HUD?src=/ohc_nint . | | |

- Edit Standard PDF template using Adobe Acrobat Professional.

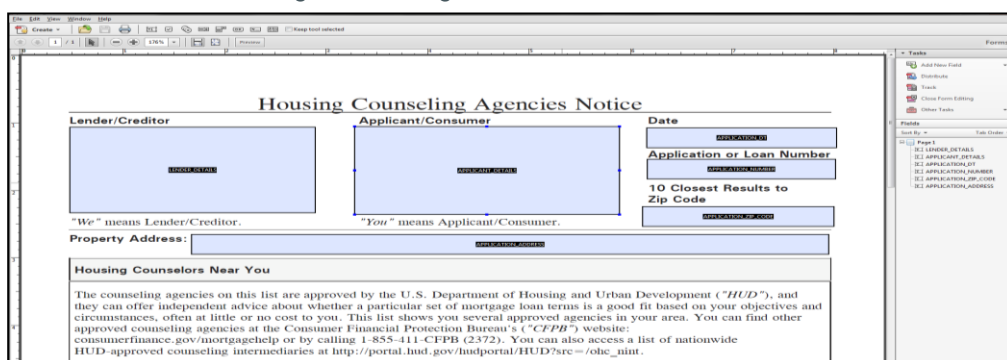


- Rename existing text Form Field placeholder with BI Publisher Data model element using property palette.

In the below example, we have updated element name of text filed **Lender/Creditor** with BI Publisher Data model **LENDER_DETAILS**.

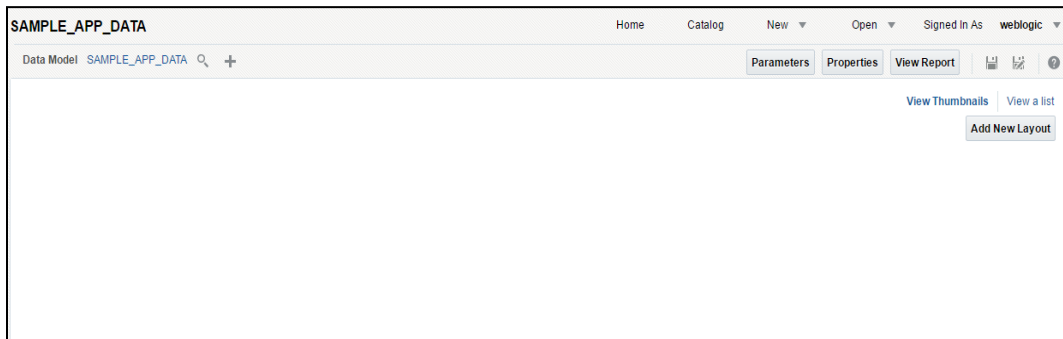
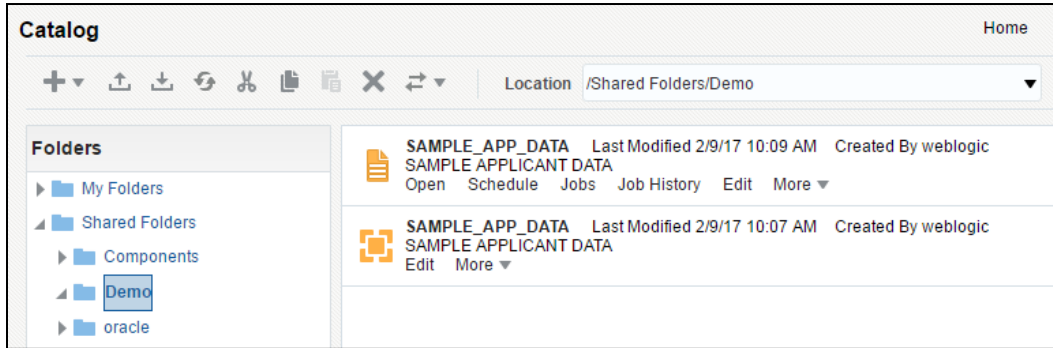


- Repeat the process for all the elements which requires data to be populated from Oracle Financial Services Lending and Leasing.

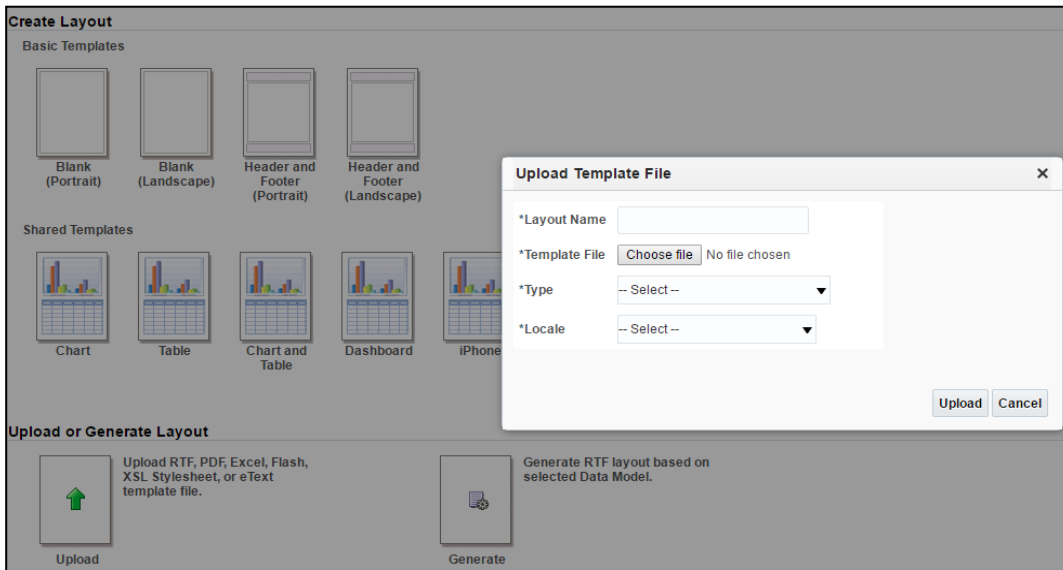


Uploading PDF Template in BI Publisher

- Once PDF template is finalized, upload PDF Template into BI Publisher. For this example, we will be uploaded to **BI Publisher → Catalog → Share Folder → Demo → SAMPLE_APP_DATA → Edit → Add New Layout**



- Click on **Upload** to update new PDF template.



Upload Template File ✕

*Layout Name

*Template File SAMPLE_APP_DATA.pdf

*Type ▼

*Locale ▼

- Generate Correspondence/Letters/Reports.

ORACLE BI Publisher Enterprise Search All Administration

SAMPLE_APP_DATA Home Catalog New Open

SAMPLE_APPLICATION

VMP996C 1 / 1

Housing Counseling Agencies Notice

| Lender/Creditor | Applicant/Consumer | Date |
|-----------------|--------------------------|----------------------------|
| SAMPLE LENDER | SAMPLE APPLICANT DETAILS | 01-DEC-2001 |
| | | Application or Loan Number |
| | | SAMPLE APP NUMBER |
| | | 10 Closest Results to |
| | | Zip Code |
| | | SAMPLE ZIP |

"We" means Lender/Creditor. "You" means Applicant/Consumer.

Property Address: SAMPLE ADDRESS

| Housing Counselors Near You |
|--|
| <p>The counseling agencies on this list are approved by the U.S. Department of Housing and Urban Development ("HUD"), and they can offer independent advice about whether a particular set of mortgage loan terms is a good fit based on your objectives and circumstances, often at little or no cost to you. This list shows you several approved agencies in your area. You can find other approved counseling agencies at the Consumer Financial Protection Bureau's ("CFPB") website: consumerfinance.gov/mortgagehelp or by calling 1-855-411-CFPB (2372). You can also access a list of nationwide HUD-approved counseling intermediaries at http://portal.hud.gov/hudportal/HUD?src=/ohc_unt.</p> |
| The list of approved counseling agencies was updated |

References:

- <http://docs.oracle.com/middleware/12212/bip/BIPRD/GUID-602DBD14-E28A-40CC-8355-D44859E4631F.htm#BIPRD2848>
- https://blogs.oracle.com/xmlpublisher/entry/pdf_template_versions







Oracle Corporation, World Headquarters

500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries

Phone: +1.650.506.7000
Fax: +1.650.506.7200

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