

# 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.

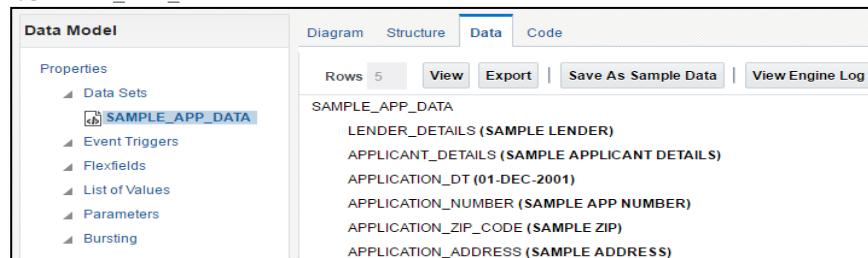
## Create Data Model:

- 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

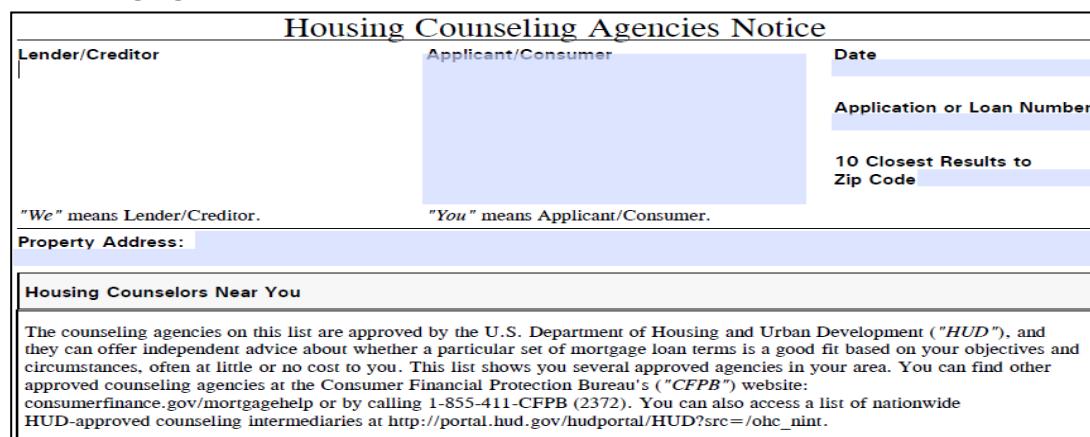
```
<?xml version="1.0"?>
<SAMPLE_APP_DATA>
  <LENDER_DETAILS>SAMPLE LENDER</LENDER_DETAILS>
  <APPLICANT_DETAILS>SAMPLE APPLICANT DETAILS</APPLICANT_DETAILS>
  <APPLICATION_DT>01-DEC-2001</APPLICATION_DT>
  <APPLICATION_NUMBER>SAMPLE APP NUMBER</APPLICATION_NUMBER>
  <APPLICATION_ZIP_CODE>SAMPLE ZIP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



The screenshot shows the Oracle BI Publisher Data Model interface. The left sidebar is titled 'Data Model' and contains a tree view of properties, with 'Data Sets' expanded to show 'SAMPLE\_APP\_DATA' selected. The main panel displays the XML structure of the data model. The top navigation bar includes tabs for 'Diagram', 'Structure', 'Data' (which is active), and 'Code'. Below the tabs are buttons for 'Rows 5', 'View', 'Export', 'Save As Sample Data' (which is highlighted), and 'View Engine Log'.

## Process to embed lender data into standard PDF Template

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



The screenshot shows a sample published standard PDF template for “Housing Counseling Agencies Notice”. The template is a form with several fields:

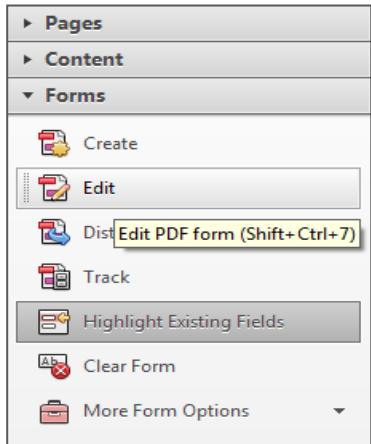
- Lender/Creditor**: A large text area.
- Applicant/Consumer**: A large text area.
- Date**: A field with a blue background.
- Application or Loan Number**: A field with a blue background.
- 10 Closest Results to Zip Code**: A field with a blue background.

At the bottom of the template, there are two definitions:

- “We” means Lender/Creditor.**
- “You” means Applicant/Consumer.**

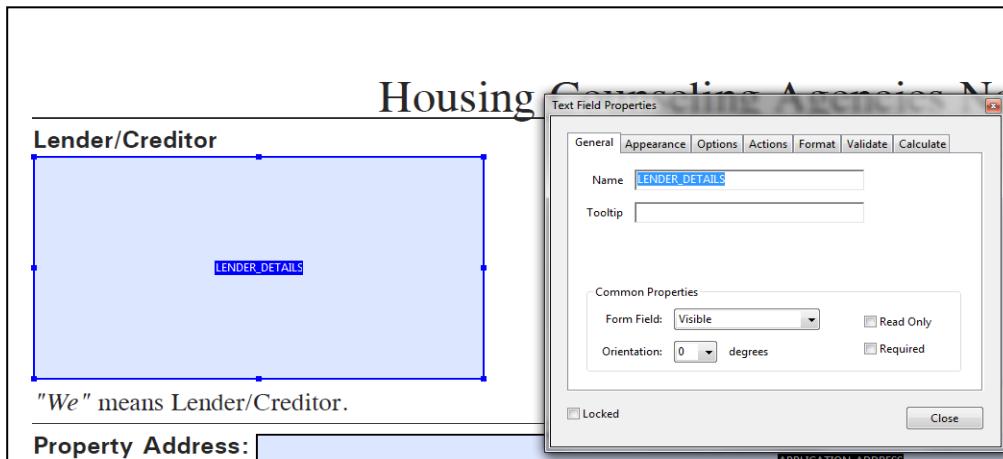
Below these definitions, there is a section for **Property Address:** and a section for **Housing Counselors Near You**. The **Housing Counselors Near You** section contains a detailed description of HUD-approved counseling agencies.

- Edit Standard PDF template using Adobe Acrobat Professional.

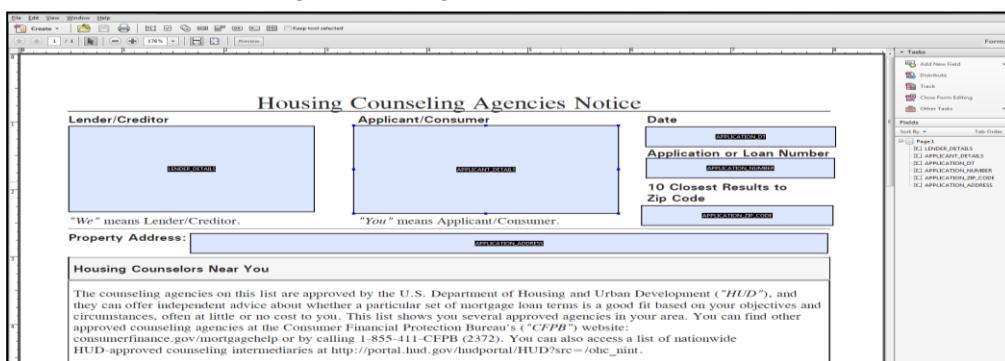


- Rename existing text Form Field placeholder with BI Publisher Data model element using property palette.

In the below example, we have updated element name of text field **Lender/Creditor** with BI Publisher Data model element **LENDER\_DETAILS**.

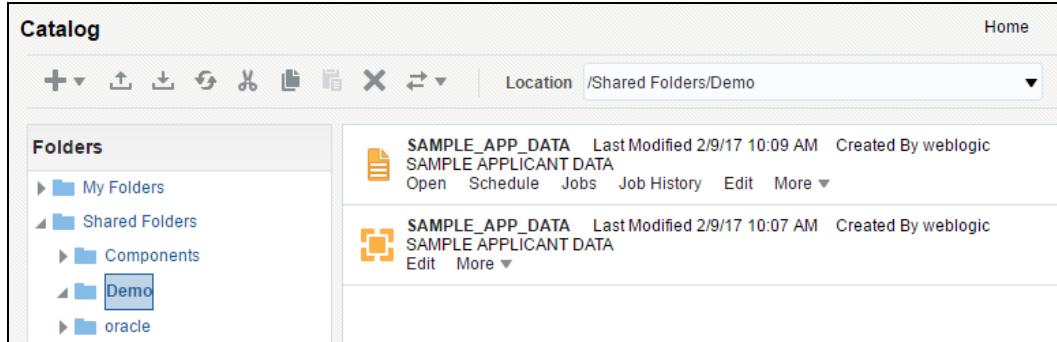


- Repeat the process for all the elements which requires data to be populated from Oracle Financial Services Lending and Leasing.

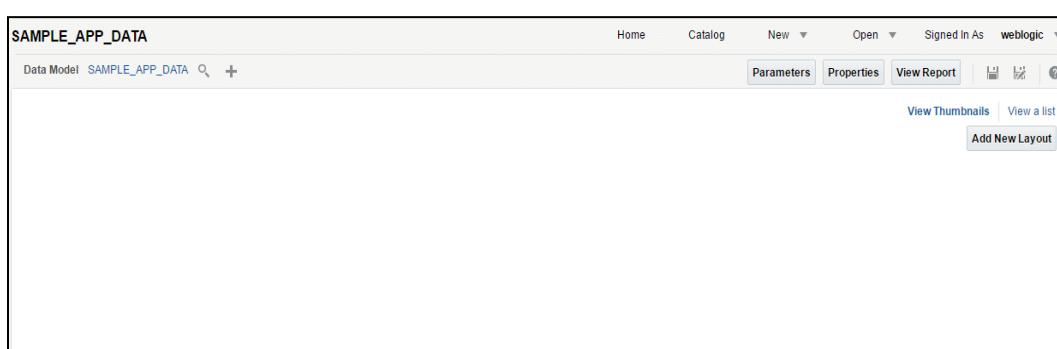


## Uploading PDF Template in BI Publisher

- 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**

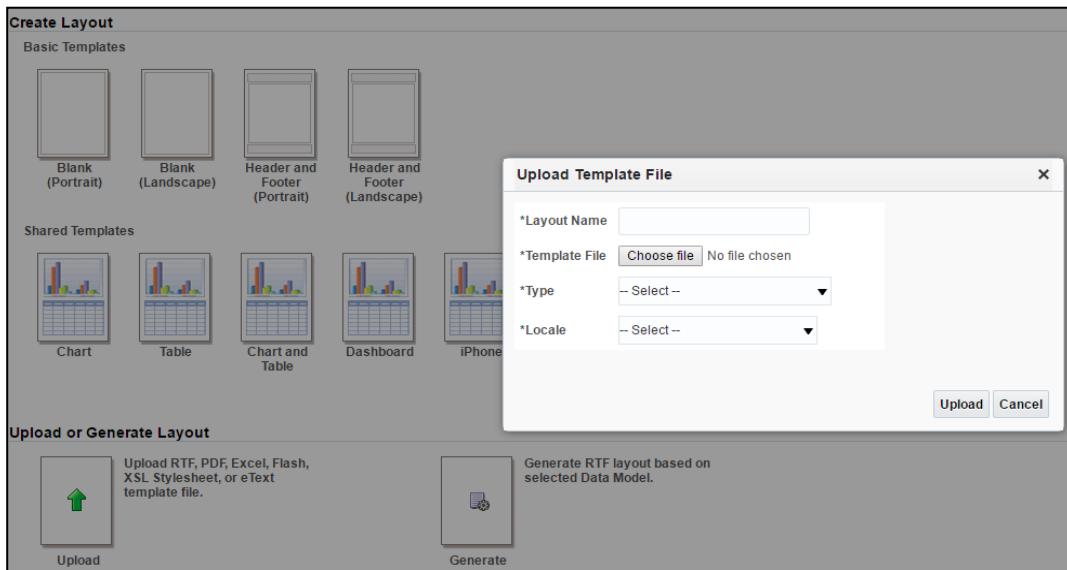


The screenshot shows the BI Publisher Catalog interface. The left sidebar shows 'Folders' with 'My Folders', 'Shared Folders' (expanded to show 'Components', 'Demo', and 'oracle'), and 'oracle'. The main area shows two entries under 'SAMPLE\_APP\_DATA': 'SAMPLE\_APP\_DATA' (Last Modified 2/9/17 10:09 AM, Created By weblogic, SAMPLE\_APPLICANT DATA) and another 'SAMPLE\_APP\_DATA' entry (Last Modified 2/9/17 10:07 AM, Created By weblogic, SAMPLE\_APPLICANT DATA). Both entries have 'Open', 'Schedule', 'Jobs', 'Job History', 'Edit', and 'More' options.

The screenshot shows the BI Publisher Data Model interface for 'SAMPLE\_APP\_DATA'. The top navigation bar includes 'Home', 'Catalog', 'New', 'Open', 'Signed In As weblogic'. The main area is empty, showing a large white space with buttons for 'View Thumbnails', 'View a list', and 'Add New Layout'.

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



The screenshot shows the 'Create Layout' interface. It includes sections for 'Basic Templates' (Blank (Portrait), Blank (Landscape), Header and Footer (Portrait), Header and Footer (Landscape)) and 'Shared Templates' (Chart, Table, Chart and Table, Dashboard, iPhone). At the bottom, there are 'Upload or Generate Layout' buttons: 'Upload' (with a green arrow icon) and 'Generate' (with a document icon). A 'Upload Template File' dialog is open, prompting for 'Layout Name' (input field), 'Template File' (button 'Choose file' with 'No file chosen'), 'Type' (dropdown 'Select'), and 'Locale' (dropdown 'Select'). Buttons for 'Upload' and 'Cancel' are at the bottom of the dialog.

**Upload Template File**

\*Layout Name

\*Template File  SAMPLE\_APP\_DATA.pdf

\*Type

\*Locale

- Generate Correspondence/Letters/Reports.

ORACLE® BI Publisher Enterprise

SAMPLE\_APP\_DATA

SAMPLE\_APPLICATION

VMP996C

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**Housing Counseling Agencies Notice**

Lender/Creditor	Applicant/Consumer	Date
SAMPLE LENDER	SAMPLE APPLICANT DETAILS	01-DEC-2001
"We" means Lender/Creditor.		Application or Loan Number
Property Address: SAMPLE ADDRESS		SAMPLE APP NUMBER
		10 Closest Results to Zip Code
		SAMPLE ZIP

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

The counseling agencies on this list are approved by the U.S. Department of Housing and Urban Development ("HUD"), and they can help you understand your housing options. This list 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/mortgagelelp 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\_mint.

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](https://blogs.oracle.com/xmlpublisher/entry/pdf_template_versions)



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**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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