

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></sample_app_data> |
| | <lender_details>SAMPLE LENDER</lender_details> |
| | <pre><applicant_details>SAMPLE APPLICANT DETAILS</applicant_details></pre> |
| | <application_dt>01-DEC-2001</application_dt> |
| | <pre><application_number>SAMPLE APP NUMBER</application_number></pre> |
| | <application_zip_code>SAMPLE ZIP</application_zip_code> |
| | <application_address>SAMPLE ADDRESS</application_address> |
| | |
| 1 | |

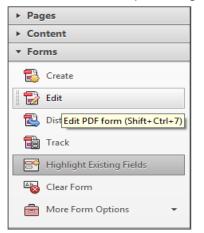
| Data Model | Diagram Structure Data Code |
|--|---|
| Properties Data Sets SAMPLE_APP_DATA Event Triggers Fiexfields List of Values Parameters | Rows 5 View Export I Save As Sample Data View Engine Log SAMPLE_APP_DATA LENDER_DETAILS (SAMPLE LENDER) APPLICANT_DETAILS (SAMPLE APPLICANT DETAILS) APPLICANT_DETAILS (SAMPLE APPLICANT DETAILS) APPLICATION_DT (01-DEC-2001) APPLICATION_NUMBER (SAMPLE APP NUMBER) |
| Bursting | APPLICATION_ZIP_CODE (SAMPLE ZIP) APPLICATION_ADDRESS (SAMPLE ADDRESS) |

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 | | | | |
| I | | Application or Loan Number | | | | |
| | | 10 Closest Results to Zip Code | | | | |
| "We" means Lender/Creditor. | "You" means Applicant/Consumer. | | | | | |
| Property Address: | 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**.

٦

| Housing | Text Field Properties |
|-----------------------------|--|
| Lender/Creditor | General Appearance Options Actions Format Validate Calculate |
| LENDER_DETAILS | Name LENDER OF TALLS Tooltip Common Properties Form Field: Visible Read Only Orientation: 0 degrees Required |
| "We" means Lender/Creditor. | Locked Close |
| Property Address: | |

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

| Dis | Edit View | Window Malo | | | |
|-----|-----------|--|---|--|---|
| | Create v | | cted | | |
| | | | | | Forms |
| 100 | B | | Berne Berne Berne Bernele Bernele Bernele Bernele Berne B | | - Tasks |
| 1 | | Housin | g Counseling Agencies Notice | Date | Add New Field Solution Track Close Form Editing Close Form Editing Other Tests Fields |
| | | REEXCHARGE | | Application or Loan Number Bureausatesesse 10 Closest Results to Zip Code | Intel By * Tak Drafes * Intel Standser, Detraits Intel Standser, Detraits Intel Standser, Detraits Intel Standser, Detraits |
| H | | "We" means Lender/Creditor. | "You" means Applicant/Consumer. | | |
| ł | | Property Address: | | | |
| | | Development (<i>"HUD"</i>), and fit based on your objectives and over area. You can find other list of nationwide t. | | | |

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

| Catalog | | Home |
|--------------------------------|---|--|
| +• ± ± • # # | × | ↓ Location /Shared Folders/Demo |
| Folders | | SAMPLE_APP_DATA Last Modified 2/9/17 10:09 AM Created By weblogic SAMPLE APPLICANT DATA Open Schedule Jobs Job History Edit More 💌 |
| Shared Folders Components Demo | 8 | SAMPLE_APP_DATA Last Modified 2/9/17 10:07 AM Created By weblogic SAMPLE APPLICANT DATA Edit More ▼ |
| oracle | | |

| SAMPLE_APP_DATA | Home Catalog New v Open v Signed In As weblogic v |
|------------------------------|---|
| Data Model SAMPLE_APP_DATA O | Parameters Properties View Report |
| | View Thumbnails View a list Add New Layout |

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

| Create Layout | | | | | | | | |
|---------------------|---|------------------------------------|-------------------------------------|----------|-------------------------------|----------------------------|---|---------------|
| Basic Template | s | | | | | | | |
| Blank (Portrait) | Blank (Landscape) | Header and Footer (Portrait) | Header and Footer (Landscape) | ſ | Upload Temp | plate File | | × |
| Shared Templa | tes | | | | *Layout Name | | | |
| | | | | | *Template File | Choose file No file chosen | | |
| 10.10 | 10.10 | 10.10 | 1 a.d. | a la ala | *Туре | Select | • | |
| | | | | | *Locale | Select | - | |
| Chart | Table | Chart and Table | Dashboard | iPhone | | | | |
| | | | | | | | | |
| | | | | | | | | Upload Cancel |
| Upload or Gen | erate Layout | | | | | | _ | |
| 1 | Upload RTF, PDF, XSL Stylesheet, o template file. | Excel, Flash, or eText | | | Generate RTF selected Data | layout based on Model. | | |
| Upload | | | | Generate | | | | |

| Upload Template File | | | | | | |
|----------------------|---------------------------------|--------|--------|--|--|--|
| *Layout Name | SAMPLE_APP_DATA | | | | | |
| *Template File | Choose file SAMPLE_APP_DATA.pdf | | | | | |
| *Туре | PDF Template | | | | | |
| *Locale | English 🔻 | | | | | |
| | | | | | | |
| | | Upload | Cancel | | | |

Generate Correspondence/Letters/Reports. •

| | Interprise | Search All | ▼ O, | Administration | | |
|---|--|--|--|----------------|--|--|
| SAMPLE_APP_DATA | | Home | Catalog New 👻 | Open 👻 | | |
| SAMPLE_APPLICATION | | | | | | |
| VMP996C | | | | | | |
| | H Lender/Creditor SAMPLE LENDER "We" means Lender/Creditor. Property Address: SAMPLE A | OUSING COUNSELING Agencies Noti Applicant/Consumer SAMPLE APPLICANT DETAILS "You" means Applicant/Consumer. | CC Date 01-DEC-2001 Application or Loan Numbe SAMPLE APP NUMBEI 10 Closest Results to Zip Code SAMPLE ZIP | | | |
| | 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 load of the bacd 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") velocities: consumerfinance.gov/mortgagehelp or by calling 1-857-411-CFPB (2372). You can also access a list of nationwide HUD-approved counseling agencies was updated 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
- •



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Integrated Cloud Applications & Platform Services

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