

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

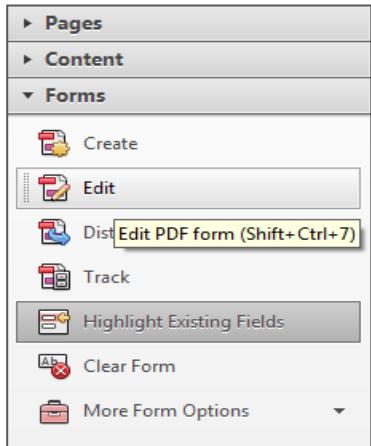
"We" means Lender/Creditor. *"You" means Applicant/Consumer.*

Property Address:

Housing Counselors Near You

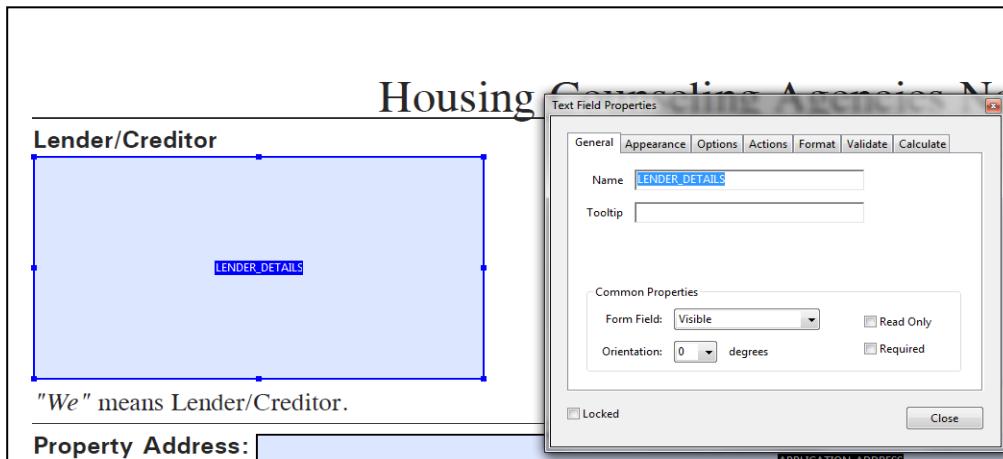
The counseling agencies on this list are approved by the U.S. Department of Housing and Urban Development ("HUD"), and they can offer independent advice about whether a particular set of mortgage loan terms is a good fit based on your objectives and circumstances, often at little or no cost to you. This 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.

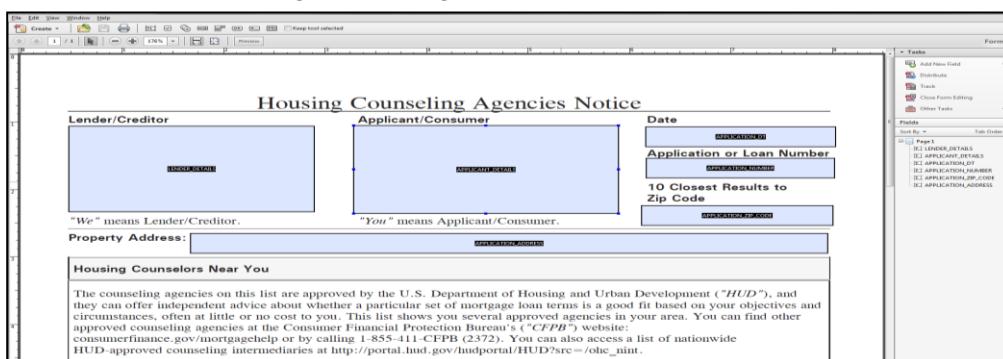


- Rename existing text Form Field placeholder with BI Publisher Data model element using property palette.

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

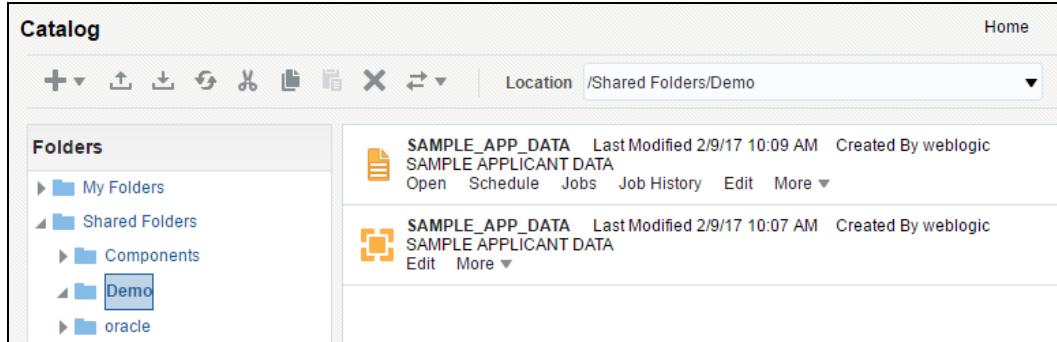


- Repeat the process for all the elements which requires data to be populated from Oracle Financial Services Lending and Leasing.



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**

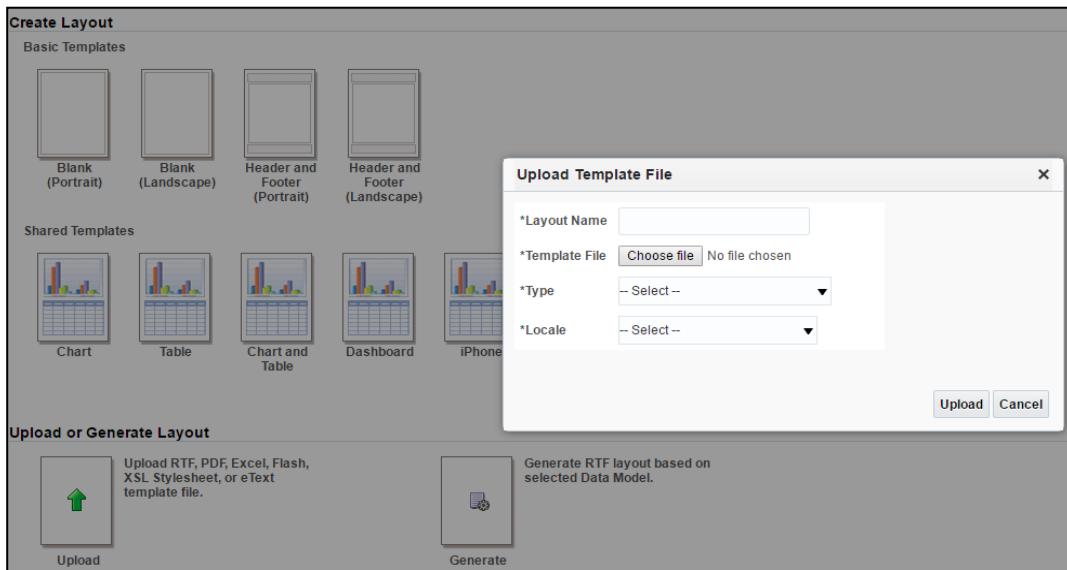


The screenshot shows the BI Publisher Catalog interface. The left sidebar shows 'Folders' with 'My Folders', 'Shared Folders' (expanded to show 'Components', 'Demo' (selected), and 'oracle'), and 'oracle'. The main area shows two entries for 'SAMPLE_APP_DATA' under 'Shared Folders/Demo'. Each entry has a file icon, the name 'SAMPLE_APP_DATA', 'Last Modified 2/9/17 10:09 AM', 'Created By weblogic', and 'SAMPLE APPLICANT DATA'. Below each entry are 'Open', 'Schedule', 'Jobs', 'Job History', 'Edit', and 'More' buttons.



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', and 'Add New Layout'. The main area is empty, showing a large white space with a 'View Thumbnails' and 'View a list' button at the top right.

- 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 an arrow icon) and 'Generate' (with a document icon). A 'Upload Template File' dialog is open on the right, containing fields for 'Layout Name' (text input), 'Template File' (file input with 'Choose file' button and 'No file chosen' message), 'Type' (dropdown 'Select'), and 'Locale' (dropdown 'Select'). At the bottom of the dialog are 'Upload' and 'Cancel' buttons.

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



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Integrated Cloud Applications & Platform Services

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