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FINANCIAL SERVICES

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.
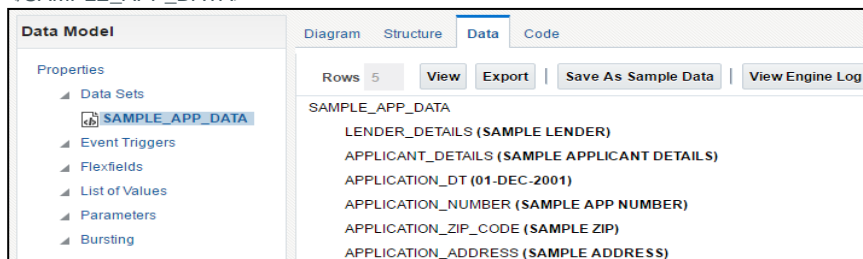- BI Publisher supports Adobe Acrobat 5.0 and above versions for updating the template.

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>
  ```
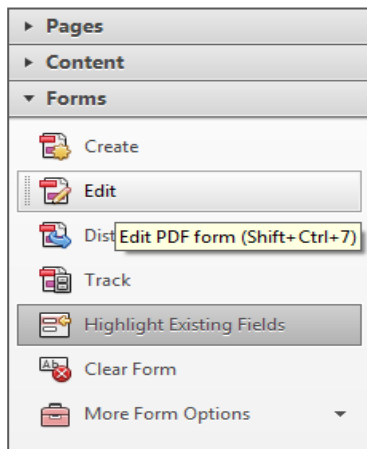

Process to embed lender data into standard PDF Template

- The following figure shows a sample published standard PDF template for "**Housing Counseling Agencies Notice**".
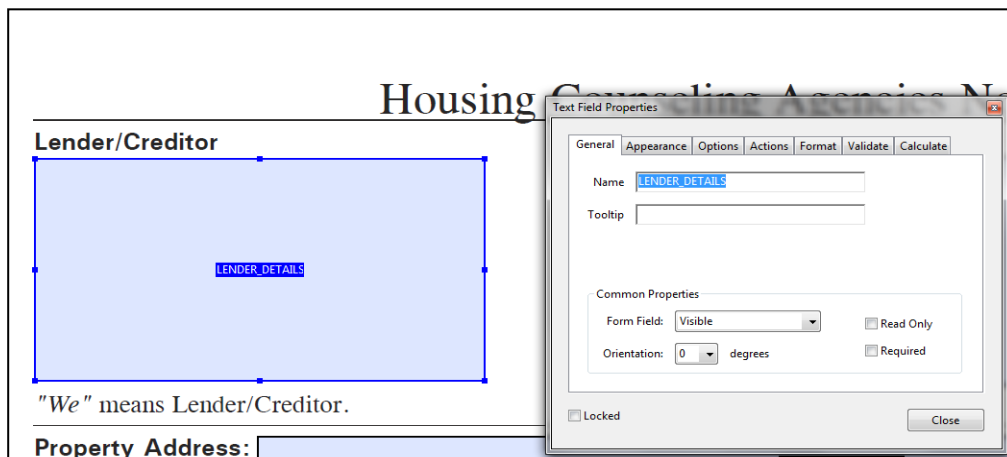
- Edit Standard PDF template using Adobe Acrobat Professional.
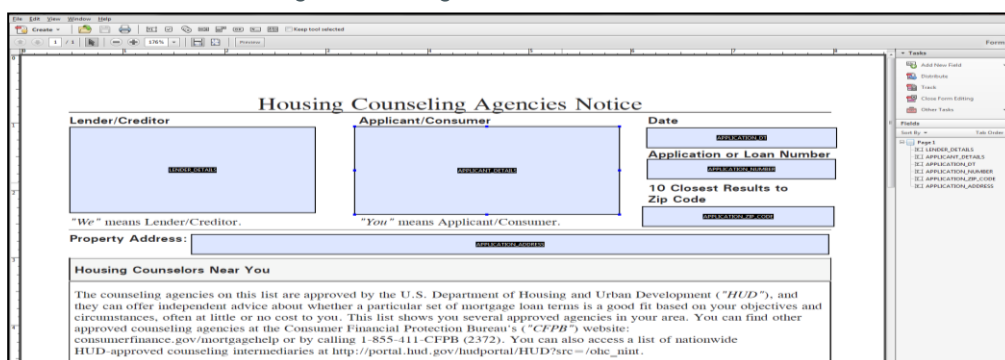

- Rename existing text Form Field placeholder with BI Publisher Data model element using property palette.

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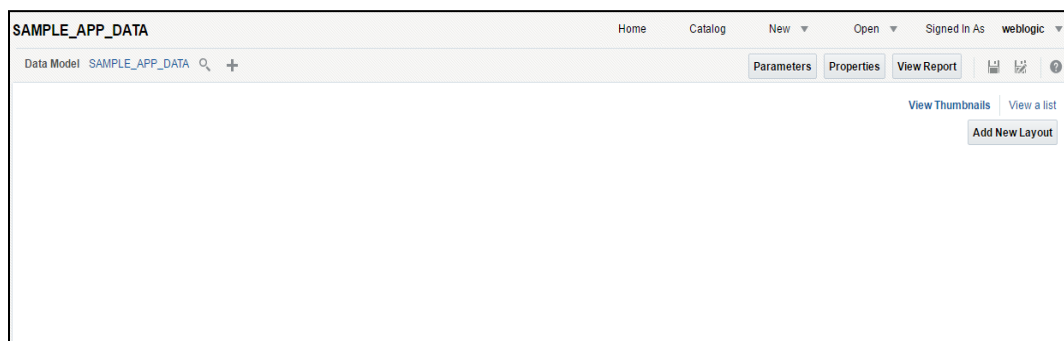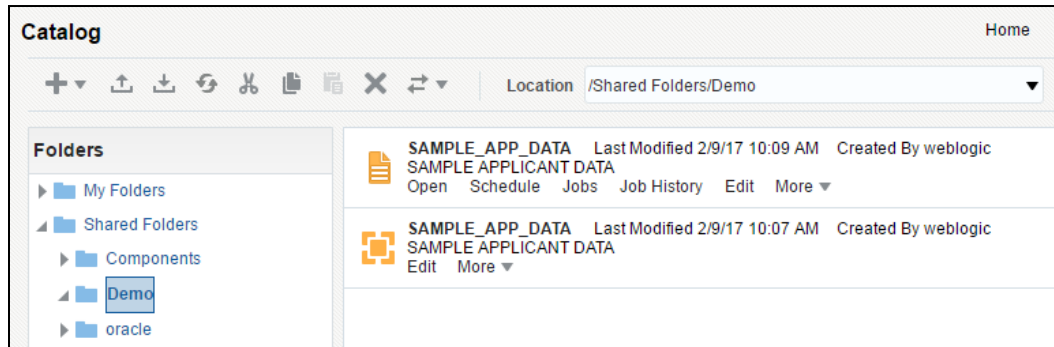

- Repeat the process for all the elements which requires data to be populated from Oracle Financial Services Lending and Leasing.
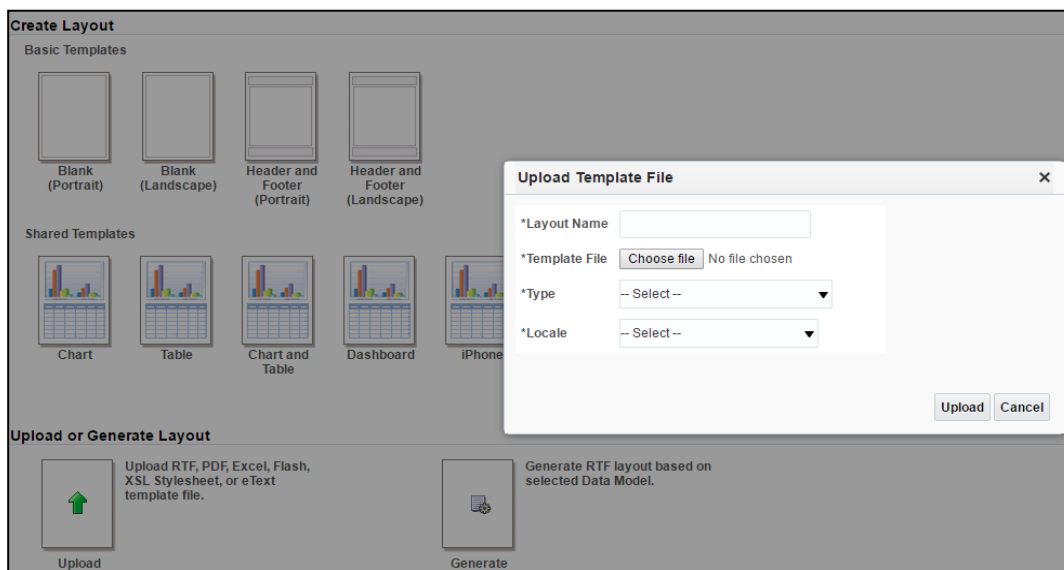
Uploading PDF Template in BI Publisher

- 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.

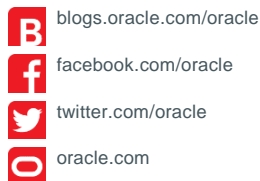- Generate Correspondence/Letters/Reports.

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

White Paper :Compliance and Regulation in the United States
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