

Oracle Enterprise Taxation and Policy Management

Optional Products Installation Guide

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Preface

This guide provides instructions for installing and configuring optional products that can be used with Oracle Enterprise Taxation and Policy Management.

This preface contains these topics:

- **Audience**
- **Related Documents**
- **Conventions**

Audience

Oracle Enterprise Taxation and Policy Management Optional Products Installation Guide is intended for anyone who needs to install and configure optional products such as Oracle BI Publisher or Oracle Documaker for Oracle Enterprise Taxation and Policy Management

Related Documents

For more information, see these Oracle documents:

- *Oracle Enterprise Taxation and Policy Management Quick Install Guide*
- *Oracle Enterprise Taxation and Policy Management Installation Guide*
- *Oracle Enterprise Taxation and Policy Management Database Administrator's Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Chapter 1

Overview

This chapter provides an overview of the optional products available for Oracle Enterprise Taxation and Policy Management, including:

- **Optional Products for Oracle Enterprise Taxation and Policy Management**
- **What is this book?**

Optional Products for Oracle Enterprise Taxation and Policy Management

This document discusses the following optional products that can be used with Oracle Enterprise Taxation and Policy Management

- Oracle BI Publisher
- Oracle Documaker

What is this book?

This book describes the installation and configuration of optional products for Oracle Enterprise Taxation and Policy Management, including the following:

- **Chapter 1: Overview** (this chapter) provides an overview of the optional products used with Oracle Enterprise Taxation and Policy Management.
- **Chapter 2: Reports Configuration for Oracle BI Publisher** discusses the reporting features of the software that can be used by Oracle Enterprise Taxation and Policy Management. It covers Oracle BI Publisher.
- **Chapter 3: On-Line Document Display and Batch Document Integration with Oracle Documaker** discusses other software products such as Oracle Documaker.

Chapter 2

Reports Configuration for Oracle BI Publisher

This section describes the steps required to configure Oracle Enterprise Taxation and Policy Management and Oracle BI Publisher to support a reporting solution that uses Oracle BI Publisher, including:

- **Installing Oracle BI Publisher Enterprise**
- **Configuring the System to Enable Reports**

Installing Oracle BI Publisher Enterprise

Oracle BI Publisher Enterprise provides the tools for:

- Making reports available over the web (establishing the required report server processes)
- Integrating reports with the Oracle Enterprise Taxation and Policy Management system
- Scheduling reports to run on a regular basis
- Managing instances of the reports that have been created by a previous run
- Managing user access to the report instances

Oracle BI Publisher is available on the Oracle Technology Network web site at the following location:

<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

This document assumes that you have already installed Oracle BI Publisher Enterprise such that requests can be pointed to the Oracle BI Publisher Enterprise running on Windows or Unix.

Version Note: We used Oracle BI Publisher 11.1.1.5.0 on Windows and Unix server for running reports on the web and for testing the integration with Oracle Enterprise Taxation and Policy Management.

In addition, the following database client software versions were used:

Version Note: Images Do Not Generate Properly Without X Server in Unix version of BI Publisher. If you are running the BI Publisher server on a Linux or Unix machine that does not have an X Server installed reports that contain images may not be properly generated. Workaround: If you are running Java 1.4.2 or later, start the environment with a headless implementation. Specify the following property at the java command line:

```
-Djava.awt.headless=true
```

For JDK versions prior to 1.4.2 please see your documentation on how to implement X Host for your environment.

Configuring the System to Enable Reports

This section describes the steps needed to configure your system to enable reports.

Configure the System to Invoke Oracle BI Publisher Enterprise Real-time

In order to invoke Oracle BI Publisher Enterprise from within Oracle Enterprise Taxation and Policy Management, the system must be configured so that Oracle Enterprise Taxation and Policy Management knows how to invoke reports.

Specify Reporting Tool Options

The following information should be defined on Reporting Tool Options table:

- **Reporting Server** is the web server URL where the reporting tool is installed.
- **Reporting Folder** defines the name of the directory on the Oracle BI Publisher server where reports are located. The Oracle Enterprise Taxation and Policy Management reporting tool algorithm constructs the URL to open Oracle BI Publisher Enterprise based on the information provided on Reporting Options. The same folder name should be used as a report folder in Oracle BI Publisher Enterprise where reports are published.

Refer to the Reports chapter of the Oracle Enterprise Taxation and Policy Management user guide for more information about the reporting options table.

Reporting Tool Algorithm

The base product provides an installation algorithm plug-in spot called Reporting Tool. This plug-in spot should contain an algorithm that invokes the reporting tool real-time. Oracle Enterprise Taxation and Policy Management provides an algorithm type called F1-BIPR-INV, which invokes Oracle BI Publisher Enterprise.

This algorithm relies on information defined in the Reporting Options table: the reporting server and folder names for accessing the reporting tool. The algorithm constructs several strings, for example, the URL of the BI Publisher, information about the report being requested and user info in the format expected by Oracle BI Publisher Enterprise. The Java program returns the correct URL to the browser. The browser then opens a BI Publisher Enterprise window with the appropriate URL.

To use the F1-BIPR-INV algorithm type to invoke Oracle BI Publisher Enterprise, perform the following steps:

1. Create an algorithm for this algorithm type.
2. On the installation options, add an entry to the algorithm collection with an algorithm entity of Reporting Tool and indicate the algorithm created in the previous step.

Interface with Oracle BI Publisher Enterprise Batch Scheduler

Presently Oracle Enterprise Taxation and Policy Management does not provide support for batch jobs with Oracle BI Publisher. Please use Oracle BI Publisher directly in order to schedule reports to run in batch.

Chapter 3

On-Line Document Display and Batch Document Integration with Oracle Documaker

Oracle Documaker enables Adobe's Portable Document Format (PDF) to be used for on-line viewing and Internet delivery of on-line letter documents. This section describes how Oracle Enterprise Taxation and Policy Management can be integrated with Documaker to enable letters to be viewed online.

Documaker can also be used to generate letters using Oracle Enterprise Taxation and Policy Management's batch functionality. To configure this functionality, make sure that the batch job used to produce letters references the appropriate file path as configured by an implementation.

The Documaker software must be purchased and installed separately. Documaker can be purchased and licensed separately from the Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>).

This section includes the following topics:

- **Supported Documaker Versions**
- **Supported Oracle Documaker Templates**
- **Installing and Integrating Documaker Templates with ETPM**
- **Oracle Documaker Integration**

Supported Documaker Versions

At the time of release the supported versions for Oracle Enterprise Taxation and Policy Management 2.3.1 are:

Windows: Documaker 12.0

Linux: Documaker 11.5

Supported Oracle Documaker Templates

Oracle Enterprise Taxation and Policy Management includes a sample algorithm to extract data for letters to integrate with Documaker. Refer to **Defining Taxpayer Options > Setting Up Customer Contact Options > Letter Printing** in the Oracle Enterprise Taxation and Policy Management Administration Guide of the online help for more information.

Installing and Integrating Documaker Templates with ETPM

Follow this procedure to integrate the supplied Documaker templates with your ETPM installation and to configure your system:

1. Log in to the target server hosting the environment that you are setting up for online image display.
2. Initialize the target environment

On Unix:

```
$$PLEBASE/bin/splenvron.sh -e <SPLENVIRON>
```

On Windows:

```
$$PLEBASE%\bin\splenvron.cmd -e <SPLENVIRON>
```

3. Add the following environmental variables:

Environment Variable	Description
DOCDISPINI	Location of the ini file. Example Value: \$\$PLEBASE/etc/doc1dirfile.ini
DOCHOSTDIR	The value of DOCHOSTDIR should be set to the location where Documaker has been installed. Example Value: /ouaf/documaker/rel115
DOCPATH	Location where the generated files from the batch are located. Example Value: /ouaf/sploutput/V231_ETPM

You can add these environment variables by using the `cmenv.sh/cmenv.cmd` exit as documented in the OUAF Technical Best Practices Guide:

Example for Unix:

```
$$PLEBASE/scripts/cm  
#> cat cmenv.sh  
DOCDISPINI=$$PLEBASE/etc/doc1dirfile.ini; export DOCDISPINI  
DOCHOSTDIR=/ouaf/documaker/rel115; export DOCHOSTDIR  
DOCPATH=/ouaf/sploutput/V231_ETPM; export DOCPATH
```

Example for Windows:

```
$$PLEBASE%\scripts/cm  
#> type cmenv.cmd  
SET DOCDISPINI=%$$PLEBASE%\etc\doc1dirfile.ini  
SET DOCHOSTDIR=C:\ouaf\documaker\rel115  
SET DOCPATH=C:\ouaf\sploutput\V231_ETPM
```

4. Run the `initialSetup` utility for the environment to generate the Oracle Enterprise Taxation and Policy Management related Documaker INI files:

On Unix:

```
$$PLEBASE/bin/initialSetup.sh
```

On Windows:

```
%SPLEBASE%\bin\initialSetup.cmd
```

5. Stop and start the environment:

On Unix:

```
$(SPLEBASE)/bin/spl.sh stop/start
```

On Windows:

```
%SPLEBASE%\bin\spl.cmd stop/start
```

6. Copy the file ETPM-<OS>.jar to a temporary folder (referred to hereafter as <TEMPDIR>) on the target server. If you are using FTP to transfer this file to a UNIX server, remember to use the BINARY option for the FTP transfer.

Note: For Unix, copy the ETPM-Unix.jar.

For Windows, copy the ETP-Windows.jar

7. Decompress the file:

```
cd <TEMPDIR>
jar -xvf ETPM--<OSplatform>.jar
```

On Unix:

```
find . -type f | xargs chmod 750
```

The ETM folder will be extracted.

8. If one does not already exist, create a folder named “etm” under the Oracle Documaker host directory <DOCHOSTDIR>. Copy the contents of the appropriate etm folder in the <TEMPDIR> to the etm directory Oracle Documaker host directory on the target application server (see the section Software Requirements in the Oracle Enterprise Taxation and Policy Management Installation Guide for installation location).

It should be at the same level as the fap folder.

Example Contents of <DOCHOSTDIR>/etm:

```
|-- etm
|  |-- data
|  |-- deflib
|  |-- forlib
|  |-- forms
|  |-- input
|  `-- table
```

9. Make sure that the Oracle Enterprise Taxation and Policy Management Administrator user ID (typically cissys) has execute permissions to all files in the <DOCHOSTDIR>/fap and <DOCHOSTDIR>/etm folders.

Sample Directory Structure

Directory	Contents
<DOCHOSTDIR>/FAP	Documaker Binaries
<DOCHOSTDIR>/etm	ETPM templates and driver programs
<DOCHOSTDIR>/tax/examples	ETPM example PDFs

Sample Generated Ini File

The following files will be populated during the execution of the initialSetup utility:

Example on Unix: doc1dirfile.ini

```
ONLINE DOC HOST=/ouaf/documaker/re1115
ONLINE DOC TEMPLATE=/ouaf/documaker/re1115/etm
DOC EXTRACT PATH=/ouaf/sploutput/V231_ETPM/
DOC IMAGE PATH=/ouaf/V231_ETPM /splapp/billView/
DOC IMAGE SCRIPT=/ouaf/documaker/re1115/etm/_ccbPrintDoc.sh
URL PREFIX=/ouaf/billView/
```

Oracle Documaker Integration

This section describes the ETPM components that are used for displaying letters using Oracle Documaker.

Oracle Documaker Algorithm

The base product provides an installation algorithm plug-in spot called Online Letter Image. This plug-in spot should contain an algorithm that invokes the Create PDF of Letter image by calling Oracle Documaker.

Oracle Enterprise Taxation and Policy Management provides an algorithm type and a corresponding algorithm called C1-LT-DISP, which invokes Oracle Documaker. This algorithm is responsible for calling the letter extract program and passing the letter information flat file to the document image generator script defined in the documentation ini file to create a letter image in PDF format. The URL of this PDF file is then returned back to the client browser, which renders the letter image.

To use the base algorithm, navigate to **Installation Options - Framework** and add an entry to the algorithm collection with an algorithm entity of Online Letter Image and the algorithm C1-LT-DISP.