

**Oracle® Insurance Policy  
Administration**

**Document Generator**

Version 9.4.0.0

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## OVERVIEW

Oracle Insurance Policy Administration (OIPA) provides users with the ability to dynamically generate documents in PDF format. Transactions that are configured with an attached GenerateDocument business rule can access OIPA data to generate a dynamic document.

The document generating system uses Crystal Reports XI. The standard Crystal Reports report file, which has the *.rpt* file extension, is used as the document template. Each individual transaction can be configured to use a specific template.

A web service, DocumentGenerator, is used by OIPA to process the document generator. The DocumentGenerator WSDL can be accessed by entering the server name and port for OIPA in the address below:

<http://<OIPA-SERVER:PORT>/PASJava/service/DocumentGenerator?wsdl>

**IMPORTANT:** Since the Document Generator uses Crystal Reports XI, appropriate licenses and media must be obtained from the vendor prior to proceeding.

# INSTALLATION

## Directory Structure

Two directories must be created: one to store the templates and one for the generated documents. Each of these directories must be accessible by the application server and OIPA instance. In the example below, the *Documents* directory is used to store the document templates, while the *GeneratedDocuments* directory is used to store the generated documents.

**Example:**

```
document.documentPath=/opt/Oracle/OIPA/Documents
document.generatedDocumentRootPath=/opt/Oracle/OIPA/GeneratedDocuments
```

## Required Libraries

Twenty required libraries must be placed in the class loader of the application server. Each of these files is included with Crystal Reports, and is not included with OIPA.

CrystalCharting.jar	CrystalCommon.jar	CrystalContentModels.jar	CrystalExporters.jar
CrystalExportingBase.jar	CrystalFormulas.jar	CrystalQueryEngine.jar	CrystalReportEngine.jar
CrystalReportingCommon.jar	Concurrent.jar	CRDBJavaServerCommon.jar	CRDBXMLServer.jar
icu4j.jar	jracerom.jar	keycodeDecoder.jar	MetafileRenderer.jar
rascore.jar	rpoifs.jar	Serialization.jar	URIUtil.jar

## Configuration Files

The Crystal Reports configuration file, *CRConfig.xml*, must be placed in the class pass of the OIPA instance. In most cases, the class path will already contain a directory where the other OIPA configuration files are housed. The *CRConfig.xml* configuration file can be placed in that directory.

The *CRConfig.xml* configuration file is included with Crystal Reports and is not included with OIPA.

## OIPA Properties File

The OIPA configuration file, *PAS.properties*, must be modified to include the necessary configuration. Refer to the **System Properties** document in the Oracle Insurance Policy Administration 9.3.0.0 documentation library published on the Oracle Technology Network (OTN) for additional information on the *PAS.properties* file.

document.crystalConnectionCount	Maximum concurrent connections
document.documentPath	The path of the document template directory
document.generatedDocumentRootPath	The path of the directory used to store generated documents.
document.documentGeneratorUrl	The address of the DocumentGenerator WSDL.

### Example:

```
document.crystalConnectionCount=1
document.documentPath=/opt/Oracle/OIPA/Documents
document.generatedDocumentRootPath=/opt/Oracle/OIPA/GeneratedDocuments
document.documentGeneratorUrl=http://localhost:8080/PASJava/service/DocumentGenerator?wsdl
```

## USING THE DOCUMENT GENERATOR

### *Configure in the Rules Palette*

After the installation steps are complete, the Rules Palette provides the tools to configure the necessary components of the Document Generator. The following configuration requirements are necessary to implement this functionality.

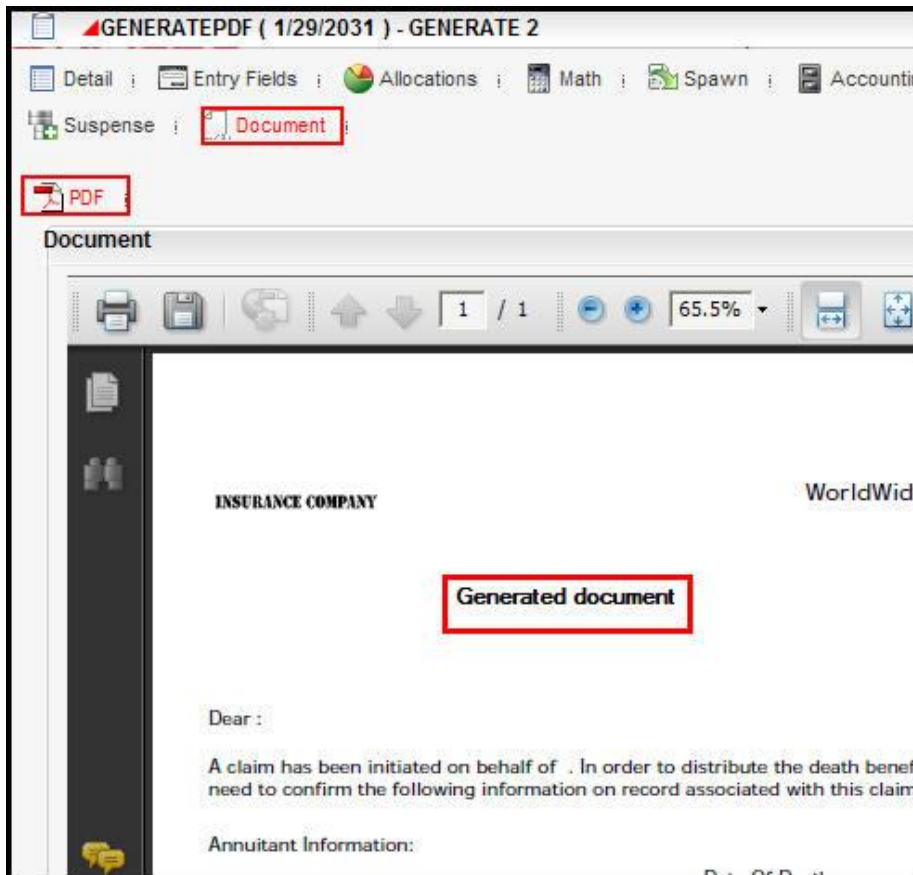
- A transaction configured to generate a PDF file.
- ExternalProcess rule attached to the transaction. This rule is configured to trigger the GenerateDocument rule.
- GenerateDocument business rule overridden at the transaction level. This rule is not listed in the TransactionBusinessRulePacket for GeneratePDF. GenerateDocument calls a template that is located on the server to dynamically generate a PDF file based on input gathered from a SQL query in the GenerateDocument rule.
- File template added to the server at the path specified in the PAS.properties file. This file name should match the name specified in the GenerateDocument configuration. This was added during the installation process described earlier in this document.

**Note:** Refer to the Rules Palette help system for complete instructions on configuring the Document Generator. This information can be found under **Main Explorer Folders | Prototypes | View PDF Documents**. The help is located inside the Rules Palette application. Click the Help option on the Main menu to reveal the link to the help.

## Generate Documents in OIPA

When the components of the Document Generator are properly configured in the Rules Palette, an OIPA user can generate a document by simply adding the PDF generating activity to the Activity screen and then processing it. Once the activity is active, the user may click the Activity Detail icon to the left of the activity. The Activity window will open. A **Document** link should be visible along the top of the window.

**Note:** Refer to the OIPA help system for complete instructions on working with PDF generating activities. The help is located in the Oracle Insurance Policy Administration 9.3.0.0 documentation library on the OTN.  
<http://www.oracle.com/technetwork/documentation/insurance-097481.html>



Activity Window in OIPA with Document Link