

Oracle® Documaker Desktop

**Importing and Exporting
XML Files with PPS**

Part number: E14903-01

May 2009

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Importing and Exporting XML Files with PPS

This document discusses importing and exporting XML files while using Documaker Workstation or PPS. This document tells you how to install the XML Import feature and configure your INI files.

These topics are discussed:

- [Modifying INI Files on page 2](#)
- [Creating an XML Export File on page 3](#)
- [Example Documaker V2-XML File Format on page 5](#)
- [Importing a Documaker XML File on page 9](#)
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MODIFYING INI FILES

To import and export XML files into Documaker Workstation, you must modify your INI files. In the c:\fap\mstrres\SAMPCO directory, you will find these INI files:

- FSISYS.INI
- FSIUSER.INI

Add the following control group and options to your FSISYS.INI file:

```
< XML_Imp_Exp >
  Ext           = .xml
  File          = export
  Path          = c:\fap\mstrres\SAMPCO
  SuppressDlg   = No
  AppendedExport = No
```

Option	Description
Ext	(Optional) Enter the extension for the output files. The default is XML.
File	(Optional) Enter a file name, such as <i>XMLEXP</i> . If you omit this option the system prompts you to enter the file name.
Path	(Optional) Enter the path, such as <i>\xmlfile</i> . If you omit this option, the system defaults to the current directory.
SuppressDlg	(Optional) Enter Yes to suppress the File Selection window. The default is No.
AppendedExport	Enter Yes to append the current exported transaction to the last one. The default is No.

Setting up the XML export format

Locate the ExportFormats control group and add this line under that control group:

```
< ExportFormats >
  09=;XM;XML Export;WXMW32->WXMExportXML;
```

NOTE: This example assumes that *09* is not already being used in this control group.

Setting up the XML import format

Locate the ImportFormats control group and add this line:

```
< ImportFormats >
  09=;XM;XML Import;WXMW32->WXMImportXML;
```

NOTE: This example assumes that *09* is not already being used in this control group.

CREATING AN XML EXPORT FILE

Follow these steps:

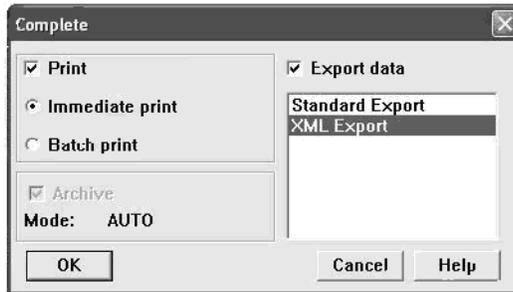
- 1 Start Documaker Workstation (PPS). From the main menu select the File, New option.
- 2 Complete the Form Selection window and press Ok.

Inc	Mode	Name	Description	AGEN	HOME	INS
X	E	DEC PAGE	Common Policy Declarations	1	1	1
X	P	FIL 1010 04 92	Supplemental Declarations			1
X	E	CG DEC	General Liability Declarations	1	1	1
X	E	FCG 0001 04 93	General Liability Cov Form			1
X	P	FCG 0010 11 92	Supplemental Form			1
X	P	FCG 2100 01 93	Supplemental Form	0	0	1
X	E	FCD 0000 04 93	Additional Insured	0	0	1

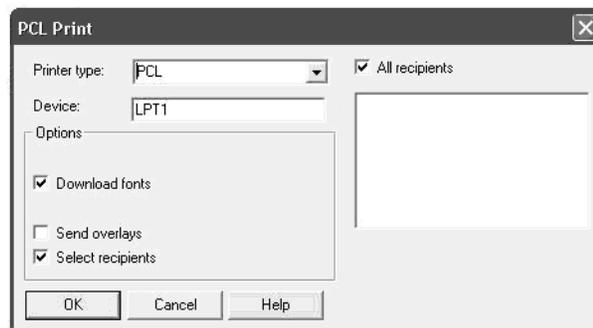
- 3 Enter data on the forms and complete the form set using the File, Complete option.

THIS POLICY CONSISTS OF THE FOLLOWING PARTS:	
	PREMIUM
Commercial Property Coverage Part	\$ 50,000.00
Commercial General Liability Coverage Part	\$ 100,000.00
Commercial Crime Coverage Part	\$ [REDACTED]
Commercial Inland Marine Coverage Part	\$ [REDACTED]
Boiler and Machinery Coverage Part	\$ [REDACTED]
Commercial Automobile Coverage Part	\$ [REDACTED]
	\$ [REDACTED]
TOTAL	\$ [REDACTED]

- 4 Next, check the Print and Export Data fields. Then click XML Export and Ok.

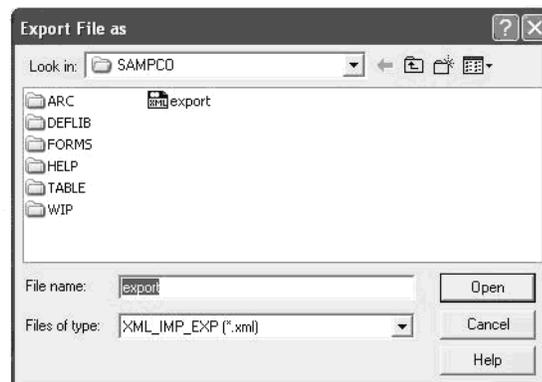


5 Print the form set.



6 Export the data to an XML file.

If the SuppressDlg option is set to No under the XML_Imp_Exp control group, the system displays this window:



The name that appears in the File Name field is the one you specified in the File option in the XML_Imp_Exp control group. If you left that option blank, enter a file name here.

EXAMPLE DOCUMAKER V2-XML FILE FORMAT

The XML file created from Documaker Workstation (PPS) should look similar to the file excerpts shown below.

```
<?xml version="1.0" encoding="UTF-8"?>
<DOCUMENT TYPE="RPWIP" VERSION="10.3">
  <DOCSET NAME="">
    <FXRFILE NAME="rel102sm" />
    <GROUP NAME="" NAME1="DOCUCORP PACKAGE" NAME2="VERSION 103">
      <FORM NAME="Tersub - Basic">
        <DESCRIPTION>Tersub - Basic Paragraph Assem</DESCRIPTION>
        <FIELD NAME="FIELDTwo">8:30 AM</FIELD>
        <FIELD NAME="FIELDThree">5:30PM</FIELD>
        <RECIPIENT NAME="AGENT" COPYCOUNT="1" CODE="" SEQUENCE="1" />
        <RECIPIENT NAME="HOME OFFICE" COPYCOUNT="1" CODE=""
          SEQUENCE="2" />
        <RECIPIENT NAME="INSURED" COPYCOUNT="1" CODE="" SEQUENCE="3" />
        :
      </FORM>
    </GROUP>
  </DOCSET>
</DOCUMENT>
```

This table lists the system-generated tag names and attributes and gives an explanation of each.

Tag Name	Attribute	Explanation
?xml		The XML declaration line
DOCUMENT	TYPE	The Documaker Standard Header. The attribute <i>Type</i> is hard-coded to be exported as <i>RPWIP</i> .
	VERSION	The version of the software being used.
DOCSET	NAME	The name of the document set that contains all forms required to process a single transaction, which is usually the FORM.DAT file.
GROUP	NAME1, NAME2, NAME3	The key names used in the FORM.DAT file to group a set of common forms, such as Key1 = Company, Key2 = LOB, and so on.
FORM	NAME	The name of a single document containing one or more pages.
DESCRIPTION		(Optional) A user-defined description of the form.
FIELD	NAME	(Optional) A field tag can be at the document, form, or section level, depending on the field scope. Fields tags at the... <ul style="list-style-type: none"> Document level will be populated to all identically named variable fields in all sections and all forms in a form set. Form level will be populated to all identically named variable fields in all sections in the current form. Section level will be populated only to the variable field within a single section.
RECIPIENT	NAME	The name used to identify who receives a copy or copies of a form set, or any part of a form set.

Importing and Exporting XML Files with PPS

Tag Name	Attribute	Explanation
	COPYCOUNT	The number of copies for a particular recipient
	CODE	Not required.
	SEQUENCE	(optional) The order in which the recipient copies print.

```

<SHEET>
  <PAGE>
    <SECTION NAME="parasem">
      <FIELD NAME="FIELD">
        <P ALIGN="CENTER">
          <FONT STYLE="FONT-SIZE: 10pt" FACE="Univers ATT">
            <B>Sample Text</B>
          </FONT>
        </P>

        <P STYLE="margin-left: 2.00in">
          <FONT STYLE="FONT-SIZE: 10pt" FACE="Univers ATT">
            Sample text left margin is 2 inches sample text
          </FONT>
        </P>
        <BR>
      :
    </PAGE>
  </SHEET>

```

Tag Name	Attribute	Explanation
SHEET		Used to identify if the form pages are simplex or duplex.
PAGE		Indicates a single sheet of paper.
SECTION	NAME	Indicates a segment of a page or an entire page. (Section Name)
FIELD	NAME	(Optional) The field tag at the section level is data that will be populated only to the variable field within a single section.
P		(Optional) Indicates a paragraph in a text area or multi-line field. <i>P</i> is used when paragraph attributes are needed.
BR		(Optional) Indicates a paragraph break. <i>BR</i> is used when there are no attributes for a paragraph.
	ALIGN	(Optional) Indicates the justification, such as <i>Left</i> , <i>Center</i> , <i>Right</i> , or <i>Left & Right</i> .
	STYLE	(Optional) Indicates the indentation, such as a 2-inch left margin or a 1-inch hanging indent margin. You can indent paragraphs three ways: normal, hanging, and first line. The default is normal.
FONT	STYLE	(Optional) Indicates the point size of the font used.
	FACE	(Optional) Indicates the font family name.
	COLOR	(Optional) Indicates the font color.

Tag Name	Attribute	Explanation
B		(Optional) Indicates bold text.
I		(Optional) Indicates italicized text.
U		(Optional) Indicates underlined text.

```

<P>
  <FONT STYLE="FONT-SIZE: 10pt" FACE="Univers ATT">
    Oracle's customer and technical support personnel
    are available to answer any questions you may having about
    your systems. You can call them between the hours of
    <INPUT NAME="FIELDTwo" VALUE="8:30 AM" SIZE="7" MAXLENGTH="25"
      ACCESSKEY="F" />
      :
  </FONT>
</P>
<BR>
<P>
  <UL TYPE="CIRCLE">
    <LI>
      <FONT STYLE="FONT-SIZE: 10pt" FACE="Univers ATT">Sample Text</
      FONT>
    </LI>
    <LI>
      <FONT STYLE="FONT-SIZE: 10pt" FACE="Univers ATT">Sample Text</
      FONT>
    </LI>
  </UL>
</P>

```

Tag Name	Attributes	Explanation
INPUT	NAME	(Optional) Indicates the name of an embedded variable field.
	VALUE	(Optional) Contains the data in the variable field.
	SIZE	(Optional) Indicates the length of the data.
	MAXLENGTH	(Optional) Indicates the length of the variable field.
	ACCESSKEY	(Optional) Specifies the scope of the field. Enter G (global), F (form global), or L (section local)

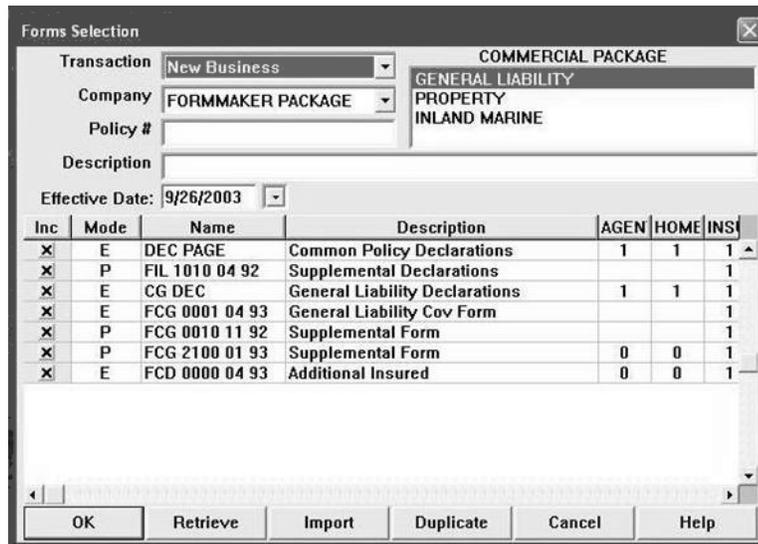
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Tag Name	Attributes	Explanation
UL	TYPE	(Optional) Indicates an unordered bullet list, such as one using symbol bullets. The type of bullet can be <i>circle</i> , <i>square</i> , or <i>disc</i> .
OL	TYPE	(Optional) Indicates an ordered bullet list, such as a numbered list or an outline. The type can be: <ul style="list-style-type: none">• Arabic number (1, 2, 3, and so on)• Upper case letter (A, B, C, and so on)• Lower case letter (a, b, c, and so on)• Upper case Roman numeral (I, II, III, IV, and so on)• Lower case Roman numeral (i, ii, iii, iv, and so on)
LI		(Optional) Indicates a bullet list item.

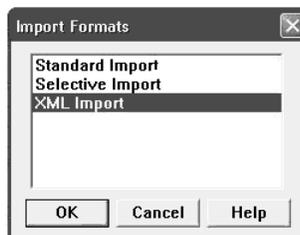
IMPORTING A DOCUMAKER XML FILE

Follow these steps to import a Documaker XML file:

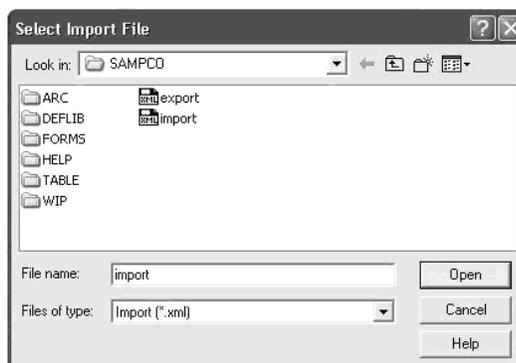
- 1 Start Documaker Workstation (PPS). From the main menu select the File, New option. Then, from the Form Selection window, click Import.



- 2 Click XML Import as the format.



- 3 Select the XML file you want to import.



- 4 Complete the Forms Selection window and click Ok.

Your form set should be populated with data from your XML import file.

TRANSFORMING XML FILES

You can export an XML file with XSLT transformation. This lets you transform the output XML file into another format, such as HTML or text. The final output format is determined by the XSLT template you choose.

The system transforms an export file with the XSLTW32.EXE program using the XSL template you specified with the XSLTName option.

To enable the export, add this option to the ExportFormats control group:

```
< ExportFormats >  
  01 =;Mx;Export with XSL;WXMW32->WXMEExportWithXSL
```

Then add these options:

```
< ExportWithXSL >  
  XSLTName      =  
  Executable     =  
  Debug         =
```

Option	Description
XSLTName	The full or relative path and name of the XSLT template.
Executable	(Optional) The full path and name of the program. If omitted, the system looks for the XSLTW32.EXE program in the directory where the AFEMNW32.EXE program is located.
Debug	(Optional) Enter Yes to leave temporary files in place.

NOTE: The default control group used by the WXMEExportWithXSL rule is the ExportWithXSL control group. If you specify another control group and one of its options are missing, the system uses the values from the ExportWithXSL control group.

You can define several INI options in the ExportFormats control group if you want to display multiple output processing options in PPS, each with its own XSL template. Here is an example:

```
< ExportFormats >  
  01 =;M1;Export with XSL;WXMW32->WXMEExportWithXSL  
  02 =;M2;Export with XSL;WXMW32->WXMEExportWithXSL
```

Each option listed under the ExportFormats control group requires a matching ExportWithXSL control group:

```
< ExportWithXSL:M1 >  
  XSLTName      =  
  Executable     =  
  Debug         =  
  
< ExportWithXSL:M2 >  
  XSLTName      =  
  Executable     =  
  Debug         =
```

Appending output transformations

You can append multiple XSLT output transformations to the same file using this INI option:

```
< ExpFile_CD >
  AppendedExport = Yes
```

This example transforms an XML export into a semicolon-delimited output file you can import into Excel. It also uses the XSLTW32.EXE program for the transformation.

First, you need these INI options:

```
< ExportFormats >
  01 =;M1;Export with XSL;WXMW32->WXMEExportWithXSL

< ExportWithXSL:M1 >
  XSLTName = x:\rp\mstrres\aeic\xsl\output1.xsl
  Executable =
  Debug = No
```

And this XSL style sheet:

```
<?xml version="1.0" encoding="UTF-8"?>
<xsl:stylesheet
xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
version="1.0">
<xsl:output method="text" encoding="ISO-8859-1" />
<!-- global variables -->
<xsl:template match="/">
<xsl:call-template name="process"/>
</xsl:template>
<xsl:template name="process">
<xsl:variable name="semicolon" select="';'"/>
<xsl:variable name="root" select="DOCUMENT/DOCSET"/>
<xsl:variable name="policy" select="$root/
FIELD[@NAME='POLICY']"/>
<xsl:variable name="insnam" select="$root/
FIELD[@NAME='INSNAM']"/>
<xsl:variable name="insnam2" select="$root/
FIELD[@NAME='INSNAM2']"/>
<xsl:variable name="insad1" select="$root/
FIELD[@NAME='INSAD1']"/>
<xsl:variable name="insad2" select="$root/
FIELD[@NAME='INSAD2']"/>
<xsl:variable name="inszip" select="$root/
FIELD[@NAME='INSZIP']"/>
<xsl:variable name="agent" select="$root/
FIELD[@NAME='AGENT']"/>
<xsl:variable name="effdte" select="$root/
FIELD[@NAME='EFFDTE']"/>
<xsl:variable name="expdte" select="$root/
FIELD[@NAME='EXPDTE']"/>
<xsl:variable name="cddesc" select="$root/
FIELD[@NAME='CDDESC_BUSDSC']"/>
<xsl:variable name="premo_prop" select="$root/
FIELD[@NAME='PREMO_PROP']"/>
<xsl:variable name="advprem" select="$root/
FIELD[@NAME='ADVPREM']"/>
<xsl:variable name="totpre" select="$root/
FIELD[@NAME='TOTPRE']"/>
```

```
<xsl:variable name="galmt" select="$root/
FIELD[@NAME='GALMT']"/>
<xsl:variable name="prcolmt" select="$root/
FIELD[@NAME='PRCOLMT']"/>
<xsl:variable name="pailmt" select="$root/
FIELD[@NAME='PAILMT']"/>
<xsl:variable name="perocc" select="$root/
FIELD[@NAME='PEROCC']"/>
<xsl:variable name="fdlmt" select="$root/
FIELD[@NAME='FDLMT']"/>
<xsl:variable name="medlmt" select="$root/
FIELD[@NAME='MEDLMT']"/>
<xsl:value-of select="concat($policy, $semicolon)"/>
<xsl:value-of select="concat($insnam, $semicolon)"/>
<xsl:value-of select="concat($insnam2, $semicolon)"/>
<xsl:value-of select="concat($insad1, $semicolon)"/>
<xsl:value-of select="concat($insad2, $semicolon)"/>
<xsl:value-of select="concat($inszip, $semicolon)"/>
<xsl:value-of select="concat($agent, $semicolon)"/>
<xsl:value-of select="concat($effdte, $semicolon)"/>
<xsl:value-of select="concat($expdte, $semicolon)"/>
<xsl:value-of select="concat($cddesc, $semicolon)"/>
<xsl:value-of select="concat($premo_prop, $semicolon)"/>
<xsl:value-of select="concat($advprem, $semicolon)"/>
<xsl:value-of select="concat($totpre, $semicolon)"/>
<xsl:value-of select="concat($galmt, $semicolon)"/>
<xsl:value-of select="concat($prcolmt, $semicolon)"/>
<xsl:value-of select="concat($pailmt, $semicolon)"/>
<xsl:value-of select="concat($perocc, $semicolon)"/>
<xsl:value-of select="concat($fdlmt, $semicolon)"/>
<xsl:value-of select="concat($medlmt, $semicolon)"/>
<xsl:text>&#xA;</xsl:text>
</xsl:template>
</xsl:stylesheet>
```

And this XML export file:

```
<?xml version="1.0" encoding="UTF-8" ?>
- <DOCUMENT TYPE="RPWIP" VERSION="10.3">
- <DOCSET NAME="">
<FIELD NAME="POLICY">A108</FIELD>
<FIELD NAME="INSNAM">SAM MALONE</FIELD>
<FIELD NAME="INSNAM2">CHEERS, INC.</FIELD>
<FIELD NAME="NEW">X</FIELD>
<FIELD NAME="INSAD1">123 MAIN ST</FIELD>
<FIELD NAME="INSAD2">SUITE 100</FIELD>
<FIELD NAME="INSCTY">ATLANTA</FIELD>
<FIELD NAME="INSST">GA</FIELD>
<FIELD NAME="INSZIP">23033</FIELD>
<FIELD NAME="AGENT">12345</FIELD>
<FIELD NAME="AGYNAM">Docucorp Insurance Agency</FIELD>
<FIELD NAME="AGYAD1">2727 Paces Ferry Road S.E.</FIELD>
<FIELD NAME="AGYAD2">Suite II-900</FIELD>
<FIELD NAME="AGYCTY">Atlanta</FIELD>
<FIELD NAME="AGYST">GA</FIELD>
<FIELD NAME="AGYZIP">30339</FIELD>
```

```

<FIELD NAME="PRMSTE">GA</FIELD>
<FIELD NAME="EFFDTE">07/05/2003</FIELD>
<FIELD NAME="EXPDTE">07/05/2004</FIELD>
<FIELD NAME="TERM">366 DAYS</FIELD>
<FIELD NAME="CDESC_BUSDSC">BAR & GRILL</FIELD>
<FIELD NAME="PREMO_PROP">12,000.00</FIELD>
<FIELD NAME="ADVPREM">12,000.00</FIELD>
<FIELD NAME="FEEDESC1">Policy Tax</FIELD>
<FIELD NAME="FEEDESC1 TAX">3%</FIELD>
<FIELD NAME="FEEAMT1">360.00</FIELD>
<FIELD NAME="FEEDESC2">Stamping Fee</FIELD>
<FIELD NAME="FEEAMT2">250.00</FIELD>
<FIELD NAME="OTHCHG">610.00</FIELD>
<FIELD NAME="TOTPRE">12,610.00</FIELD>
<FIELD NAME="CSIGNEDLOC">Atlanta, GA</FIELD>
<FIELD NAME="SIGNED DATE">07/30/2003</FIELD>
<FIELD NAME="SIGNED TIME">09:25:18</FIELD>
<FIELD NAME="OPINIT">DOCUCORP</FIELD>
<FIELD NAME="SIGNATURE">Authorized Representative</FIELD>
<FIELD NAME="GALMT">1,000,000</FIELD>
<FIELD NAME="PRCOLMT">1,000,000</FIELD>
<FIELD NAME="PAILMT">1,000,000</FIELD>
<FIELD NAME="PEROCC">1,000,000</FIELD>
<FIELD NAME="FDLMT">1,000,000</FIELD>
<FIELD NAME="MEDLMT">1,000,000</FIELD>
- <GROUP NAME="" NAME1="American Equity" NAME2="INTERLINE">
- <FORM NAME="FS100 10-2000">
<DESCRIPTION>Schedule of Forms/End</DESCRIPTION>
<FIELD NAME="FORM DESC LINE">Forms Applicable - INTERLINE</FIELD>
<FIELD NAME="FORM DESC LINE #003">A100J 02-1999 Policy Jacket -
AEIC</FIELD>
<FIELD NAME="FORM DESC LINE #004">A100 03-1997 Common Policy Dec -
AEIC</FIELD>
<FIELD NAME="FORM DESC LINE #005">A101 03-1997 Minimum Earned
Premium Endt</FIELD>
<FIELD NAME="FORM DESC LINE #006">A104 10-1998 Service of Suit</
FIELD>
<FIELD NAME="FORM DESC LINE #007">IL0017 11-1998 Common Policy
Conditions</FIELD>
<FIELD NAME="FORM DESC LINE #008">IL0021 04-1998 Nuclear Energy
Liab Excl Endt</FIELD>
<FIELD NAME="FORM DESC LINE #010">Forms Applicable - GENERAL
LIABILITY</FIELD>
<FIELD NAME="FORM DESC LINE #012">CL150 01-2000 General Liab
Coverage Part</FIELD>
<FIELD NAME="FORM DESC LINE #013">L003 03-1997 Amendment of Premium
Condition</FIELD>
<FIELD NAME="FORM DESC LINE #014">L005 01-2000 Contractual Liab
Limitation</FIELD>
<FIELD NAME="FORM DESC LINE #015">L007 07-1998 Ded Liab Ins-w/Costs
per Claim</FIELD>
<FIELD NAME="FORM DESC LINE #016">L150 01-2000 Additional
Exclusions</FIELD>
<FIELD NAME="FORM DESC LINE #017">CG0001 07-1998 Comm General Liab
Cov Form</FIELD>

```

```
<FIELD NAME="FORM DESC LINE #018">CG2160 09-1998 Excl - Year 2000
Computer Prob</FIELD>
<RECIPIENT NAME="EXTRA COPY" COPYCOUNT="1" />
<RECIPIENT NAME="GENERAL AGENT" COPYCOUNT="1" />
<RECIPIENT NAME="HOME OFFICE" COPYCOUNT="1" />
<RECIPIENT NAME="ORIGINAL" COPYCOUNT="1" />
<RECIPIENT NAME="RETAIL AGENT" COPYCOUNT="1" />
- <SHEET>
- <PAGE>
<SECTION NAME="FORMSCHA" />
</PAGE>
</SHEET>
</FORM
</DOCSET>
</DOCUMENT>
```

The output file looks like this:

```
A108;SAM MALONE;CHEERS, INC.;123 MAIN ST;SUITE 100;23033;12345;07/
05/2003;07/05/2004;; 12,000.00;
12,000.00;;1,000,000;1,000,000;1,000,000;1,000,000;1,000,000;1,000,
000;
```

You can import this file into an Excel spreadsheet.