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Enterprise PeopleTools 8.51 PeopleBook: PeopleSoft Documents Technology

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PeopleSoft Documents Technology Preface

This preface provides an overview of the PeopleSoft Documents Technology PeopleBook.

Understanding PeopleSoft Documents Technology

The *PeopleSoft Documents Technology PeopleBook* describes building and managing documents using the PeopleSoft Document Builder. It also describes how to use PeopleSoft document utilities to test documents, test document schemas, identify and resolve metadata issues resulting from copy project and upgrade processes, and more.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Documents Technology

This chapter provides an overview of PeopleSoft documents technology and discusses:

- Implementing PeopleSoft documents technology.
- Other sources of information.

PeopleSoft Documents Technology Overview

PeopleSoft documents technology includes a Document Builder, a PeopleCode API, and several utilities that enable you to create, manage, and test documents. The Document Builder enables you to build documents from the ground up, by importing schema definitions, or from PeopleSoft table definitions. A PeopleCode API is provided to enable you to populate and retrieve document data. PeopleSoft delivers a number of document utilities to help you validate documents during and after construction; validate schema; resolve copy project, import, and upgrade metadata issues; and more. You can use documents for integrating with third-party partners, as an alternative to using standalone rowsets, as a mechanism to distribute complex data, and more.

Implementing PeopleSoft Documents Technology

This section contains information to consider before you use the PeopleSoft documents technology.

Determining Security Requirements

A security analyst should evaluate your security requirements for your documents implementation. PeopleSoft Documents Technology enables you to limit write access to documents as well as contain them in specific document packages.

Assessing Staff Skills

Assess the skills of the people who will perform development and administrative functions. Developers should have familiarity, training, or experience in the following areas:

- PeopleTools
- PeopleCode

In addition, developers should understand and have research capabilities in Extensible Markup Language (XML).

Other Sources of Information

In addition to the considerations presented in this chapter, take advantage of all PeopleSoft sources of information, including installation guides, release notes, PeopleBooks, curriculum, and red papers.

See Also

"PeopleSoft Documents Technology Preface," page ix

PeopleTools 8.51 PeopleBook: Getting Started with PeopleTools

Chapter 2

Understanding PeopleSoft Documents Technology

This chapter discusses:

- PeopleSoft documents.
- Document components.
- Document formats.
- The Document Builder.
- Document utilities.
- Translating Document Builder and document utility fields.

PeopleSoft Documents

A PeopleSoft document is a managed object. It consists of two components, a logical component and a physical component or representation. PeopleSoft provides a Document Builder for creating and managing documents. Document utilities are also provided to help you test documents, validate schema, and more.

Document Components

A PeopleSoft document is made up of two components: a logical component and a physical component.

Logical Documents

The logical component of a document, or logical document, specifies the abstract structure of data. It does not specify any information about persistence, formatting, rendering, behavior, and so on.

When you work on the logical aspect of a document, you manage document elements types and data types, define element and data type properties, and so on.

Physical Documents

The physical component of a document, or physical document, specifies concrete details about a document, such as database tables, XML tags names, and so on.

When you work with the physical aspect of a document, you manage schema details, such as target and imported namespace information, whitespace, blank element filters, and more.

Document Formats

When building documents in the PeopleSoft system, you can create standard XML-formatted documents and relational-formatted documents.

When you build out the format of a document, you are working with the physical document.

XML-Formatted Documents

In an XML-formatted document, you manage XML schema details, such as target namespaces, whitespace, filtering blank elements, and so on. You also manage element tag names, prefixes, and more.

Relational-Formatted Documents

In a relational-formatted document, you map PeopleSoft records to documents.

To create a map, you map a document to a PeopleSoft record and then map the elements of that document to the fields of the PeopleSoft record. This mapping enables you to populate database rowsets using documents.

Creating relational maps for documents is optional.

The Document Builder

PeopleSoft provides a Documents Builder that enables you to create and manage documents and define XML and relational formats for them.

Document Utilities

The following table lists and briefly describes document technology utilities that PeopleSoft delivers:

Utility	***Description***
Document Schema Tester	Test document schemas against XML.

Utility	*Description*
Document Tester	Build out document contents.
Create Document from Schema	Create documents from existing XML schemas (XSD).
Update Target Location	Locate document definitions with invalid target locations.
Document/Metadata Validation	Check the integrity of metadata references to documents.

Translating Document Builder and Document Utility Fields

Fields on the Document Builder and document utility pages are not translatable.

Chapter 3

Configuring the System for Managing Documents

This chapter provides an overview of configuring a system for managing documents and discusses how to set XML document target locations and schema namespaces.

Understanding Configuring the System for Managing Documents

Before you can use the PeopleSoft system to build and manage XML documents, you must set a target location for the system to use for building and validating XML document schemas. In addition, you must set a namespace for XML document schemas.

Target locations and namespaces are discussed in further detail elsewhere in PeopleBooks.

See *PeopleTools 8.51 PeopleBook: PeopleSoft Integration Broker Administration*, "Configuring PeopleSoft Integration Broker for Handling Services," Understanding Configuring PeopleSoft Integration Broker for Handling Services.

Setting XML Document Target Locations and Schema Namespaces

To set the XML document target location and schema namespace, use the Document Setup Options page (IB_DOCUMENT_OPTION). To access the page, select PeopleTools, Documents, Documents Administration, Document Setup Options. The following example shows the page:

Document Setup Options page.

The Document Setup Options page features a Service Configuration link. When you click the link, the Service Configuration page (IB_SVCSETUP) appears. The following example shows the Service Configuration page:

Service Configuration page.

The steps for specifying an XML document target location and namespace are described elsewhere in PeopleBooks.

See *PeopleTools 8.51 PeopleBook: PeopleSoft Integration Broker Administration*, "Configuring PeopleSoft Integration Broker for Handling Services," Understanding Configuring PeopleSoft Integration Broker for Handling Services.

Chapter 4

Navigating in the Document Builder

This chapter discusses how to:

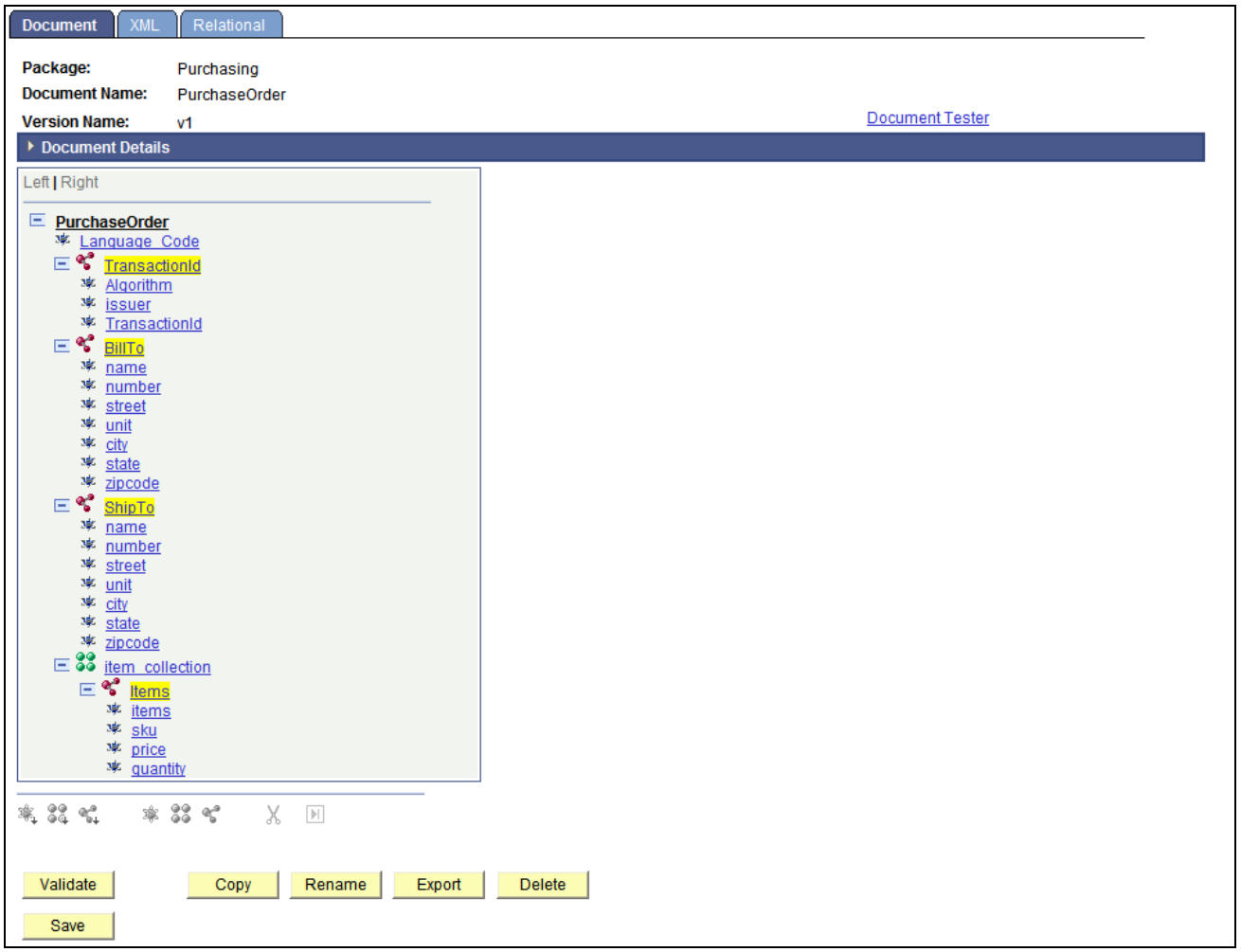
- Access the Document Builder.
- Use the document tree to view document information.
- Navigate the Document page.
- Navigate the XML page.
- Navigate the Relational page.

Accessing the Document Builder

PeopleSoft provides a Document Builder tool that enables you to build the structure of a document and define XML and relational formats for it.

The Document Builder is located in the IB_LOGICALSCHEMA component in the PeopleSoft Pure Internet Architecture.

To access the Document Builder, select PeopleTools, Documents, Document Builder. When the Document Builder opens, the default view is of the Document Builder - Documents (IB_LOGICALSCHEMA) page. The following example shows the page:



Default view of the Document Builder.

The Document Builder has three pages. The following table briefly describes the pages and how to access each of them.

Page	*Description*	*Navigation*
Document Builder - Document	Use the Document page to view: • Metadata objects that reference the current document. • General document details, such as comments about the definition, the owner of the object, and more. • A list of documents of which the current document is a child. You also use the Document page to: • Build out the logical structure of the document by adding elements to documents and defining element properties. • Copy, rename, export, and validate a document. Validate the XML document structure.	PeopleTools, Documents, Document Builder Click the Document tab.
Document Builder - XML	Use the XML page to view: • XML schema details, such as target and imported namespace information. • Options such as element whitespace, filter blank elements, and more.	PeopleTools, Documents, Document BuilderClick the XML tab.
Document Builder - Relational	Use the Relational page to map PeopleSoft records to documents, which enables you to populate a rowset with a document.	PeopleTools, Documents, Document Builder Click the Relational tab.

Subsequent sections in this chapter detail how you navigate each of the Document Builder pages.

See Also

Chapter 4, "Navigating in the Document Builder," Navigating the Document Page, page 15

Chapter 4, "Navigating in the Document Builder," Navigating the XML Page, page 19

Chapter 4, "Navigating in the Document Builder," Navigating the Relational Page, page 23

Using the Document Tree to View Document Information

The system displays the structure of a document in a hierarchical format in a document tree.

The document tree appears on each page of the Document Builder. In most cases, when you click an element name, additional information appears for you to view or define on the right side of the page. The information that appears depends on the Document Builder page that you are viewing.

This section discusses how to:

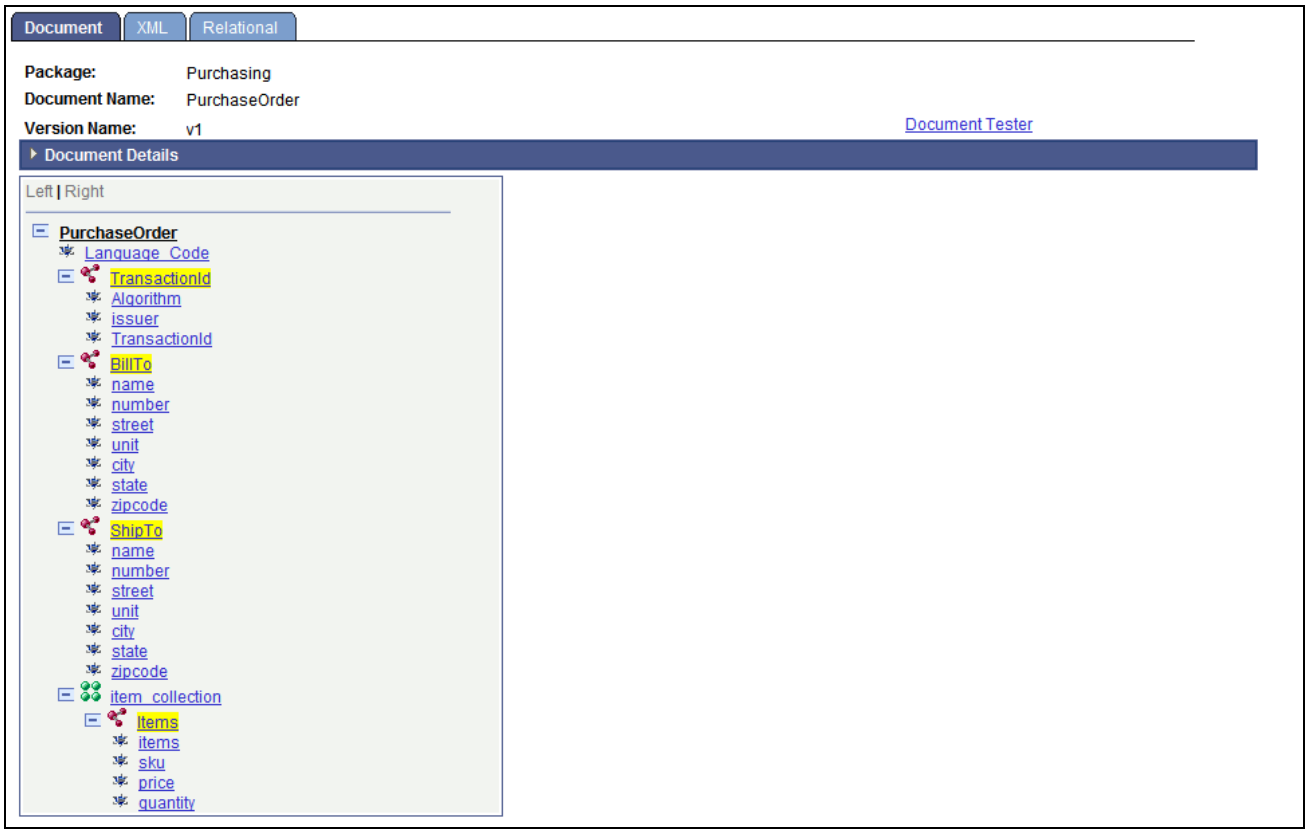
- View the document tree.
- View elements in the document tree.
- Expand and collapse the document tree.
- Select elements and view element properties.

Other chapters of this PeopleBook discuss using the document tree to build and manage documents.

Viewing the Document Tree

When you open a document in the Document Builder, the Document Builder - Document page appears, and the document tree for the definition appears after the Document Details section.

The following example shows the document tree for the PurchaseOrder document as it appears on the Document Builder - Document page:



Document Builder - Documents page showing PurchaseOrder document in the document tree.

Viewing Elements in the Document Tree

A document has one root element and, by default, the same name as the document definition. The root can have one or more child elements; child elements can have none, one, or more peer elements or child elements; and so on.

In the previous example, the root element has the name of the document, *PurchaseOrder*. The root has the following child elements: *Language_Code, TransactionID, BillTo, ShipTo,* and *Item_collection.* All elements except for *Language_Code* have child elements.

When you view elements in the document tree, the icons to the left of the element name identify the element type:

	Primitive element.
	Collection element.
	Compound element.

These icons also appear on the buttons of the action toolbar. You use the element action toolbar to add elements to the document tree.

Element types and the action toolbar are discussed in greater detail elsewhere in this PeopleBook.

See Also

Chapter 6, "Adding Elements to Documents," Understanding Element Types and Data Types, page 31

Chapter 6, "Adding Elements to Documents," Using the Elements Action Toolbar, page 32

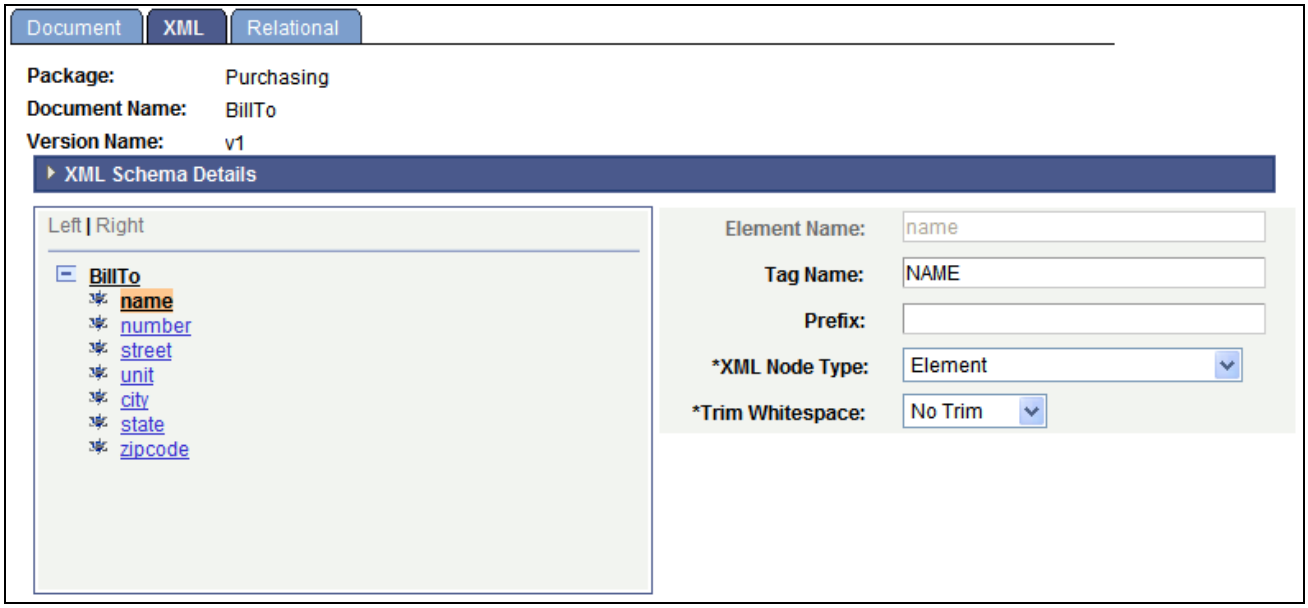
Expanding and Collapsing the Document Tree

You can expand and collapse the document tree by clicking the Expand (+) and Collapse (–) buttons next to the parent elements.

Selecting Elements and Viewing Element Properties

In most cases, when you select an element name in the document tree, properties that are defined or can be defined for the element appear on the right side of the page. This behavior is consistent for all pages of the Document Builder.

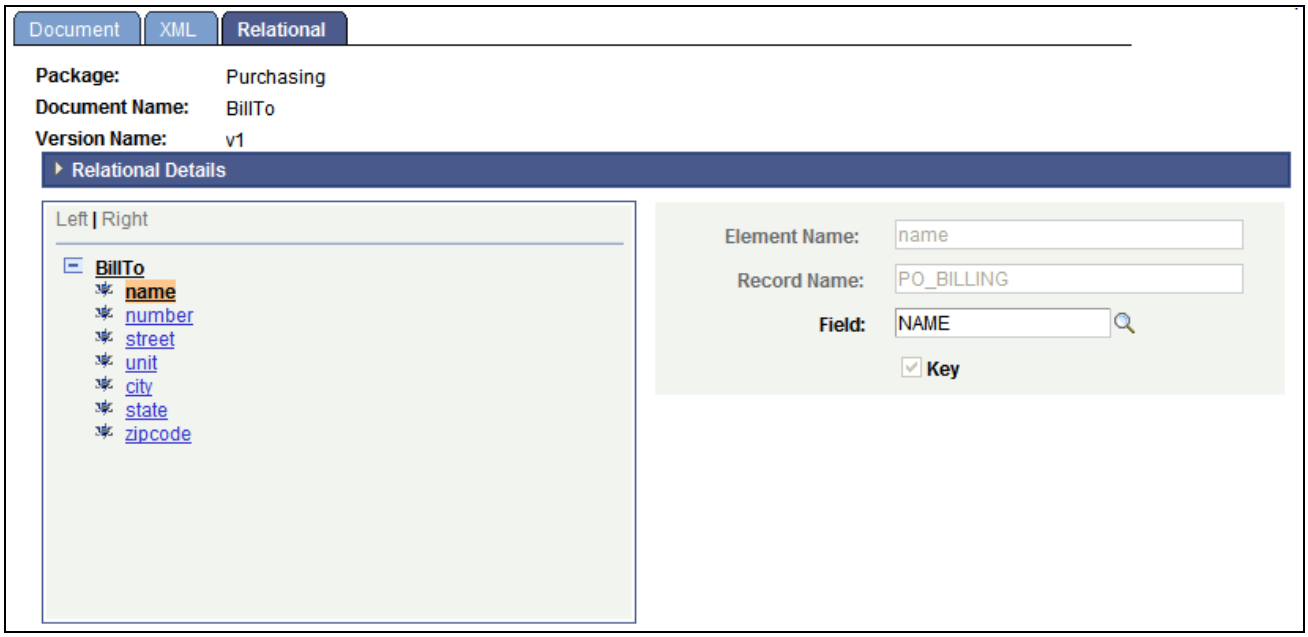
The following example shows the Document Builder - XML page of the *BillTo* document:



Document Builder - XML page showing BillTo document tree.

The *name* element is selected in the document tree. When you select the element on this page, the system displays XML property information for the element.

The following example shows the Document Builder - Relational page for the BillTo document.



Document Builder - Relational page showing BillTo document tree.

On this page, when you select the *name* element, the system displays properties for any PeopleSoft fields that are mapped to the element to the right of the document tree.

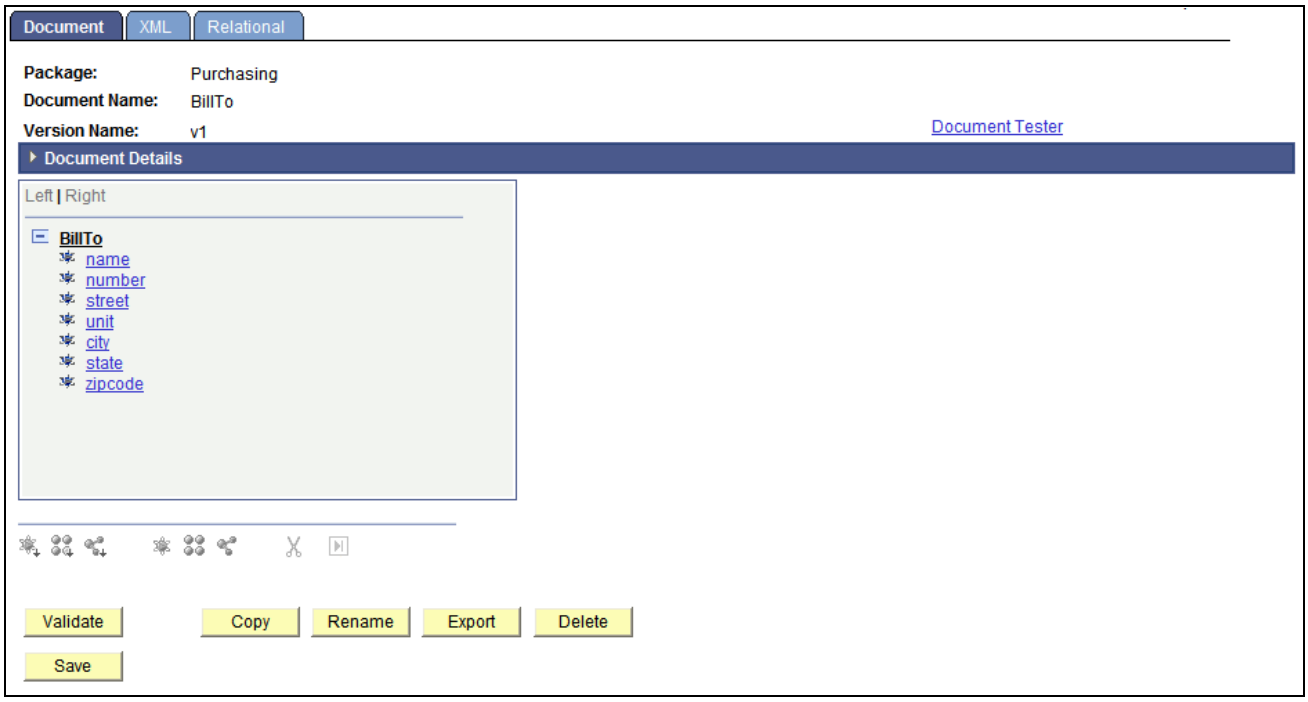
Navigating the Document Page

This section discusses how to:

- Access the Document Builder - Document Page
- View metadata references.
- View document details.
- View document dependencies.
- View element properties.
- View the action toolbar.

Accessing the Document Builder - Document Page

The Document page (IB_LOGICALSCHEMA) is the default view in the Document Builder. To access the Document Builder - Document page, select PeopleTools, Documents, Document Builder. The following example shows the page:



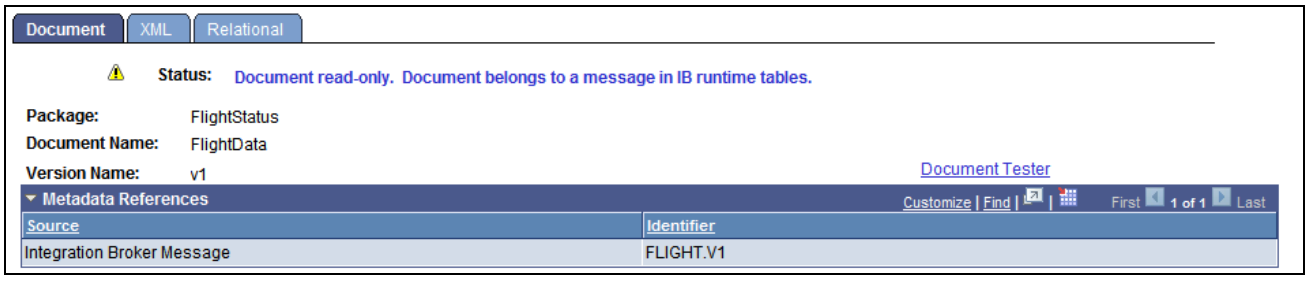
Document Builder - Document page.

Viewing Metadata References

If a document is referenced by another metadata object in the system, a Metadata References section appears on the Document Builder - Documents page that lists the object type and the object definition name that references the document.

By default, the section appears collapsed on the page. To expand and view the section, click the arrow icon next to the Metadata References section label. To collapse the section, click the arrow again.

The following example shows the Metadata References section for the *FlightData* document:



The Metadata References section expanded.

The Source column lists the PeopleTools metadata object type that references the document. The Identifier column lists the name of the object definition that references the document.

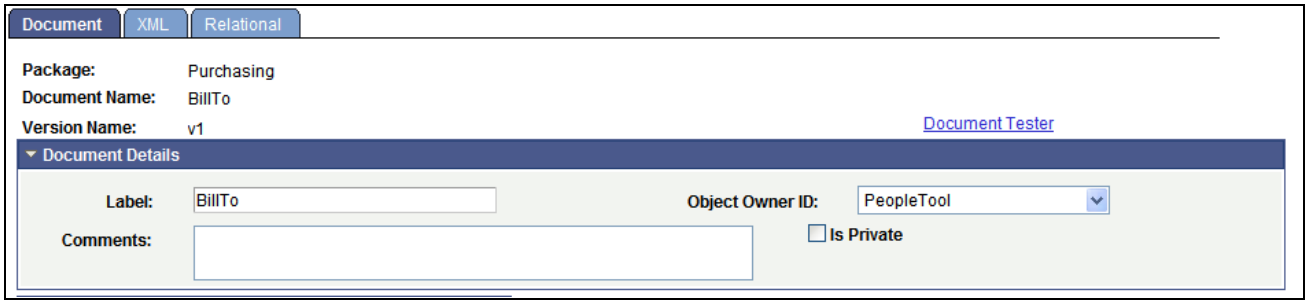
In the example, an Integration Broker message metadata object references the *FlightData* document. The name of the Integration Broker message referencing the document is *FLIGHT.V1*.

Viewing Document Details

The Document Builder-Documents page features a Document Details section that provides information about the document, such as a document label, owner ID, free-form comments, and whether the document is designated as a private document.

The section appears collapsed by default. To expand and view the section, click the arrow icon next to the Document Details section label. To collapse the section, click the arrow again.

The following example shows the Document Details section for the BillTo document:

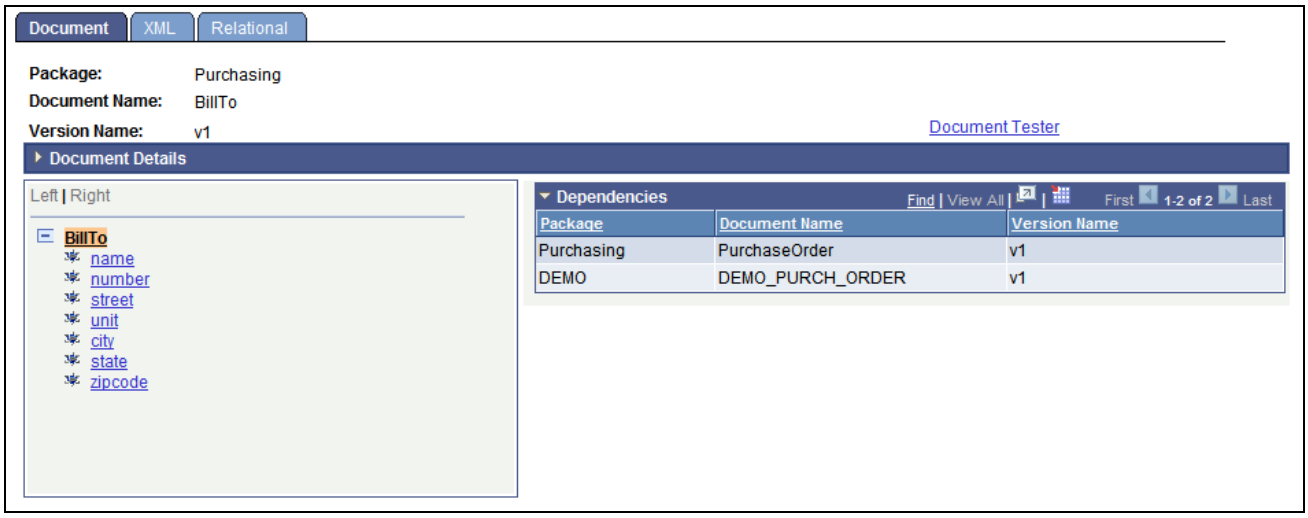


The Document Details section expanded.

Viewing Document Dependencies

If a document is a child of another document in the system, then it appears in the Document Dependencies grid on the Document Builder - Document page. The Document Dependencies grid appears on the right side of the page when you click the root element in the document tree.

The following example shows document dependencies for the *BillTo* document:



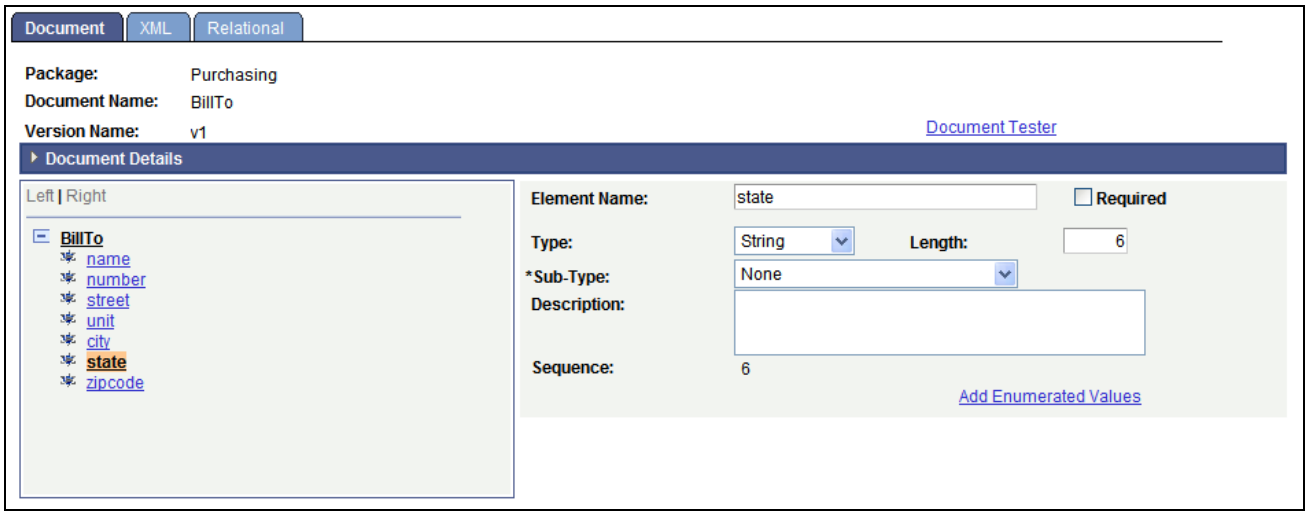
The Dependencies grid showing the BillTo document as a child of two other documents in the system.

The previous example shows that the *BillTo* document is a child document in the *PurchaseOrder* and *DEMO_PURCH_ORDER* documents.

Unless write-restricted, any changes you make to a document will impact any parent documents.

Viewing Element Properties

When you click any element in the document tree other than the root element, properties for the element appear on the right side of the page. The following example shows the element properties for the *state* element of the BillTo document:



Document page showing properties for the *state* element of the *BillTo* document.

The element properties that appear depend on the element type.

Element properties are discussed in detail elsewhere in this PeopleBook.

See Also

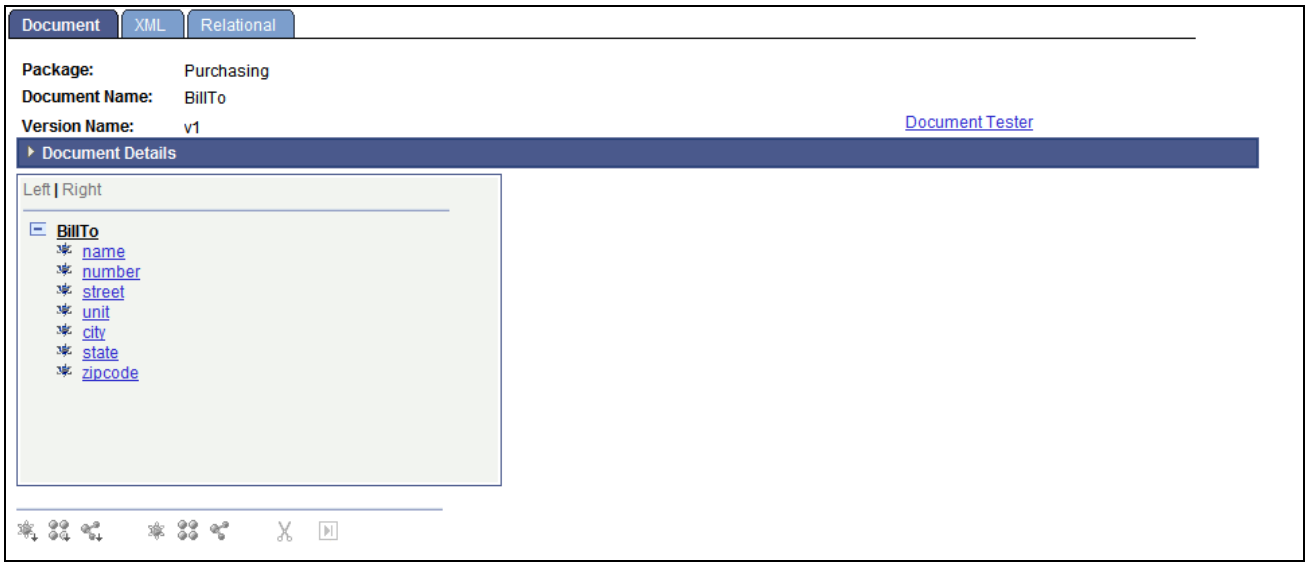
Chapter 6, "Adding Elements to Documents," page 31

Viewing the Action Toolbar

The action toolbar appears below the document tree on the Document Builder - Document page.

Use the toolbar to add child and peer elements to a document, move elements in the tree, or delete elements in the tree.

In the following example, the action toolbar appears below the document tree of the BillTo document:



Document page showing toolbar buttons enabled when you select an element in the document tree.

The action toolbar is not enabled until you select an element in the document tree. In addition, the actions that are available to perform on an element vary, depending on the element with which you are working and the structure of the tree.

Using the action toolbar is discussed in more detail elsewhere in this PeopleBook.

See Chapter 6, "Adding Elements to Documents," Using the Elements Action Toolbar, page 32.

Navigating the XML Page

This section provides an overview of navigating the XML page and discusses how to:

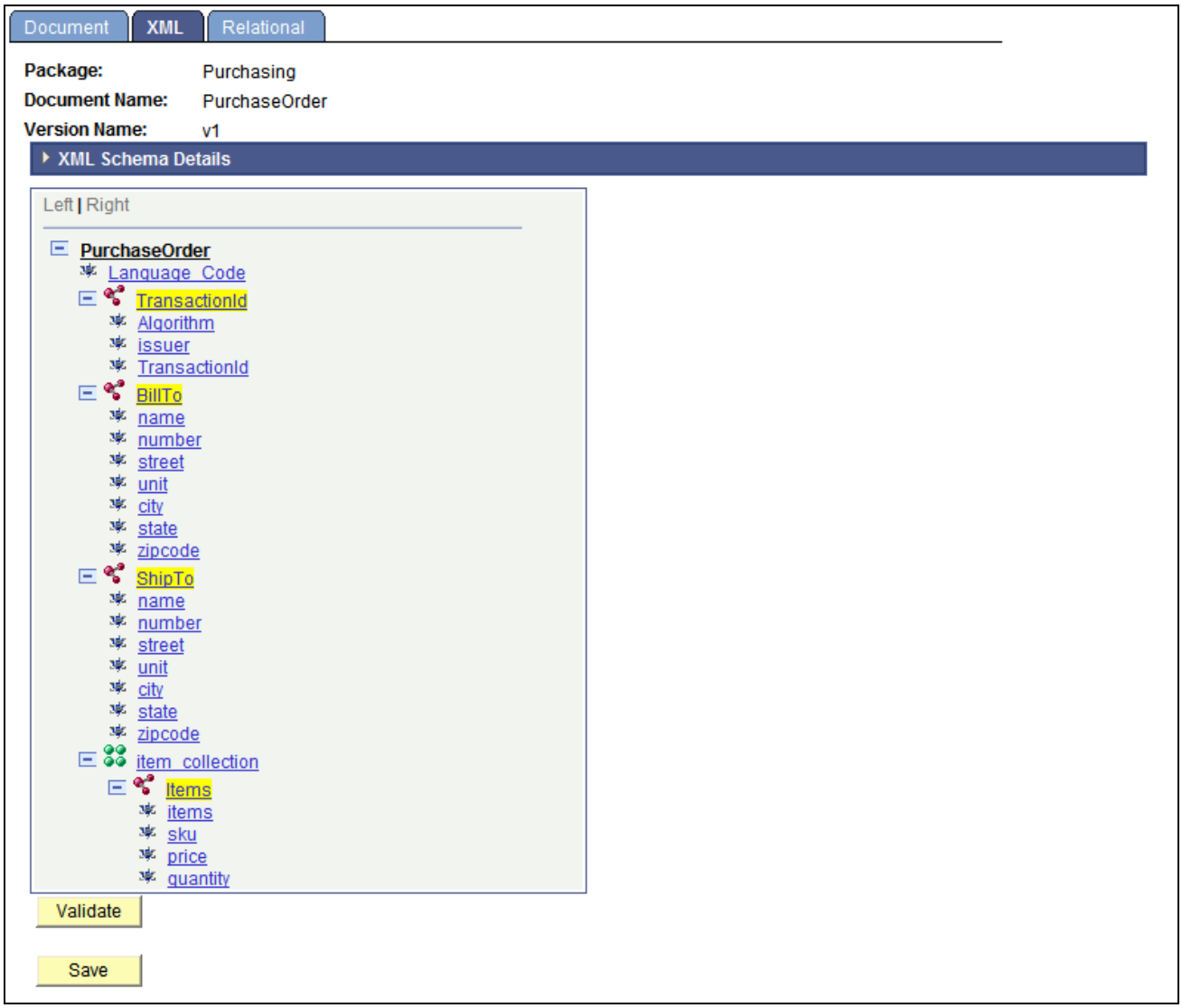
- Access the Document Builder - XML page.
- View XML schema details.
- View XML schema properties for elements.

Understanding Navigating the XML Page

The Document Builder - XML page (IB_XMLSCHEMA) features an XML Schema Details section that displays XML schema information defined for the document. It also enables you to view and define schema properties for elements, such as tag names, tag prefixes, and so on.

Accessing the Document Builder - XML Page

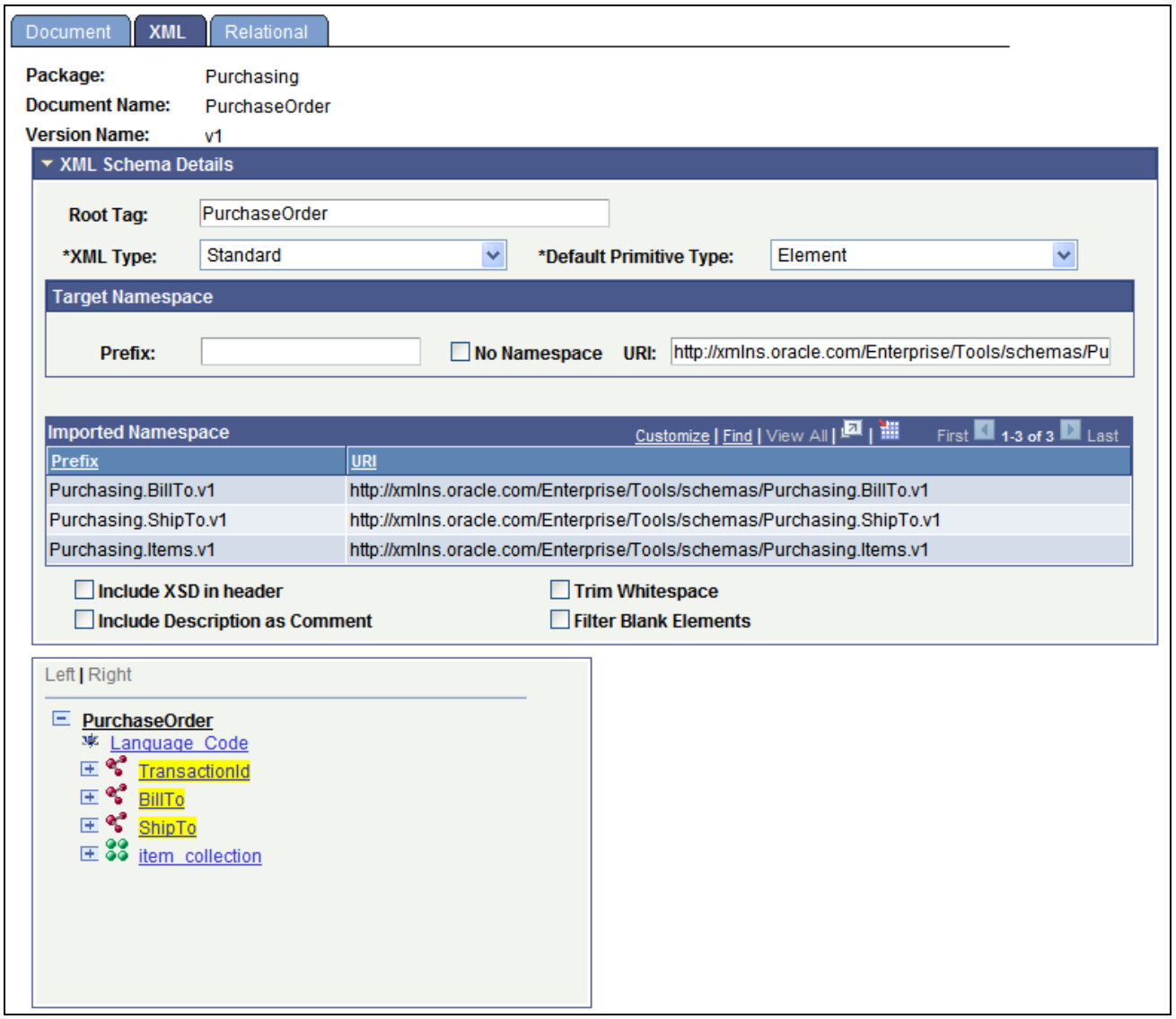
To access the Document Builder - XML page, select PeopleTools, Documents, Document Builder, and click the XML tab. The following example shows the Document Builder - XML page:



Document Builder - XML page.

Viewing XML Schema Details

By default, the XML Schema Details section of the Document Builder - XML page appears collapsed on the page. To expand the section, click the arrow icon next to the XML Schema Details label. The following example shows the section expanded:

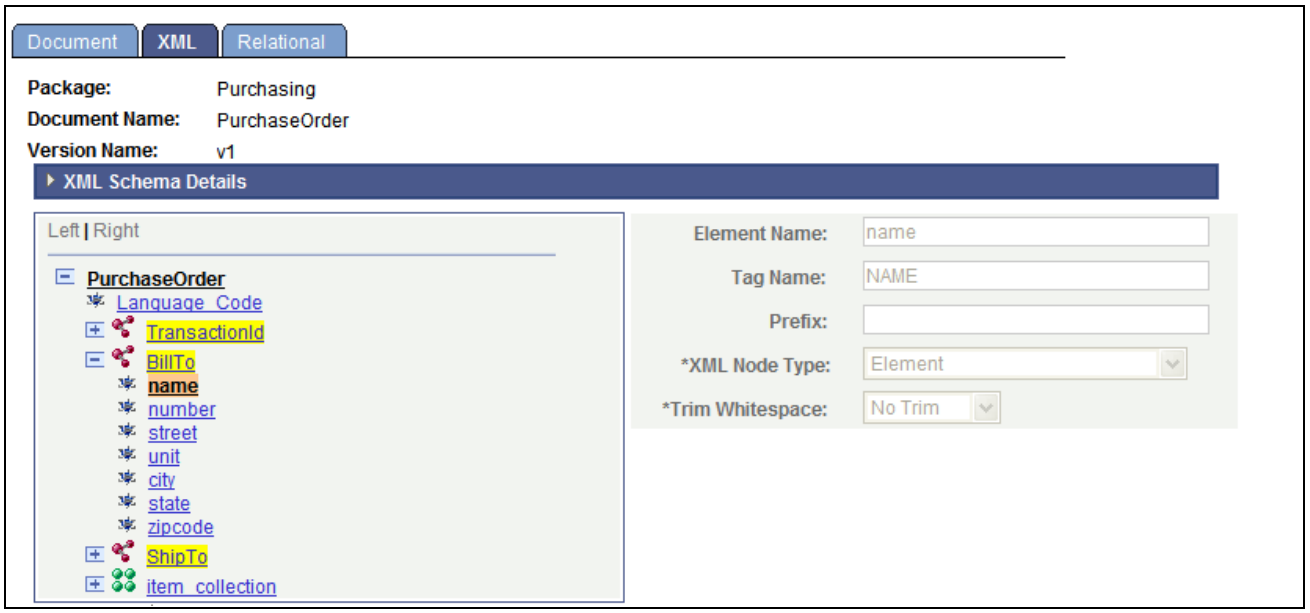


Document Builder - XML page with XML Schema Details section expanded.

The XML Schema details shows the root tag name, XML type, and element type. Target namespace information provided includes the target namespace prefix and URI,, and if the namespace is defined to appear in the generated XML. The Imported Namespace section shows the names and URIs of any documents that are defined as elements in the document. Other information provided includes whether the schema reference is included in the XML, if whitespace is to be trimmed, if blank elements are filtered out of the XML, and so on.

Viewing XML Schema Properties for Elements

The Document Builder - XML page also displays property information about elements. When you select an element in the document tree, properties for the element appear on the right side of the page. The following example shows that the *name* element is selected in the document tree, and the XML schema properties defined for it appear on the right side of the page:



Document Builder - XML page showing XML schema properties for selected element in the document tree on the right side of the page.

The schema properties for the name element are read-only. They are read-only because the *BillTo* element is actually a document itself. To make any changes to it, you would access the *BillTo* document and make the appropriate changes.

Navigating the Relational Page

This section provides an overview of the Relational page and discusses how to:

- Access the Relational page.
- View records mapped to documents.
- View record fields mapped to document elements.

Understanding the Relational Page

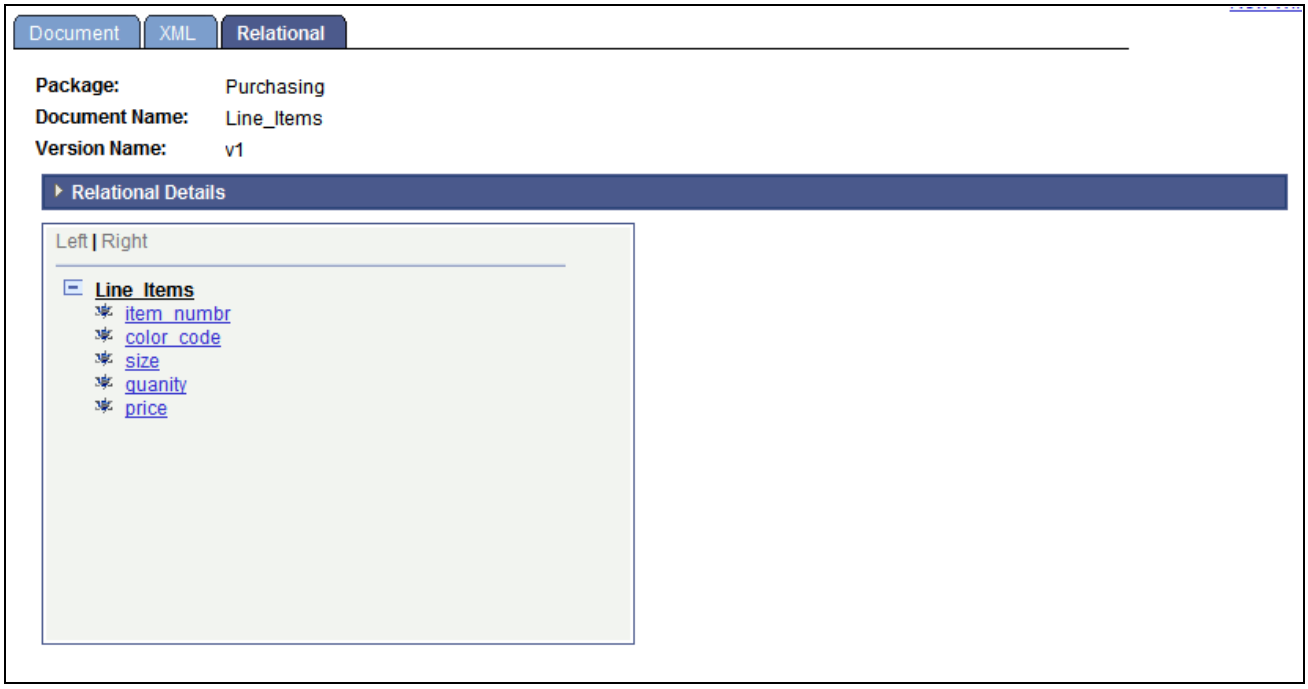
Use the Document Builder - Relational page (IB_RELATSCHEMA) to view PeopleSoft records and fields that are mapped to documents and document elements.

Mapping PeopleSoft records and fields to documents is optional.

Usually, mapping PeopleSoft records to documents is done so that you can populate a rowset using a document.

Accessing the Relational Page

To access the Document Builder - Relational page, select PeopleTools, Documents, Document Builder and click the Relational tab. The following example shows the page:

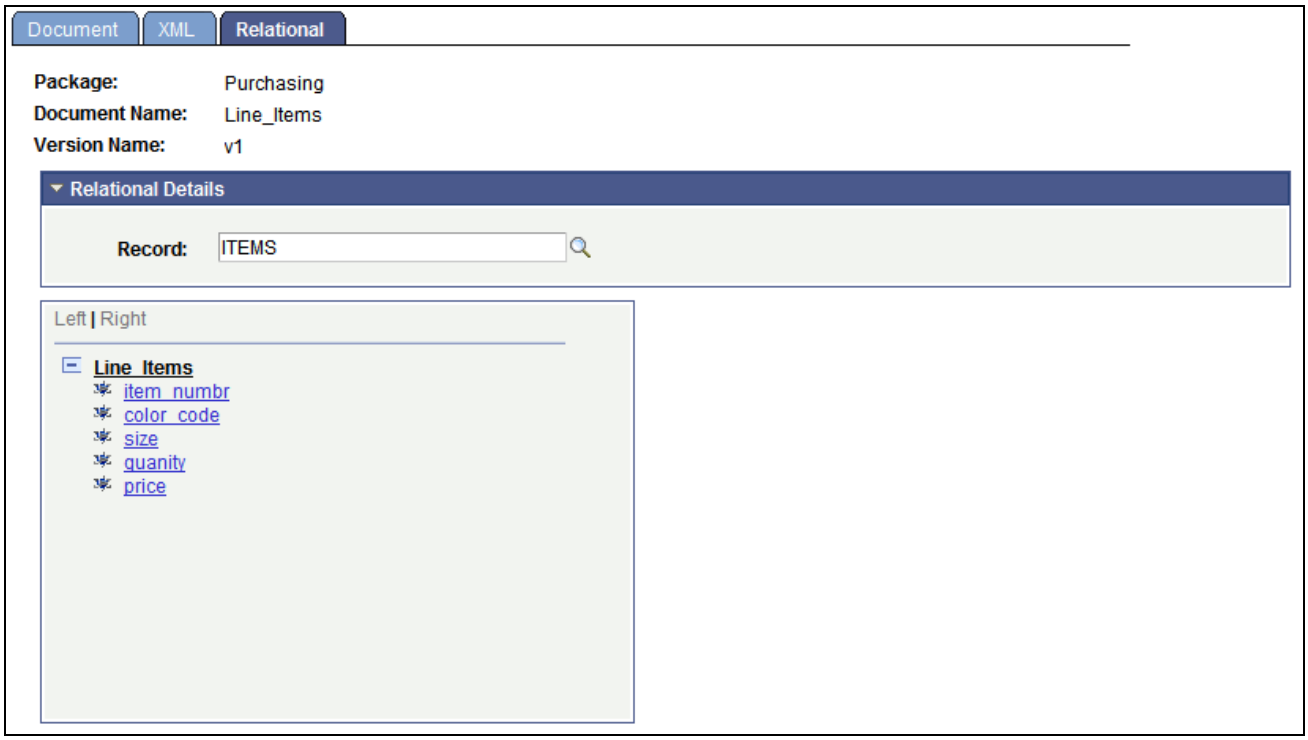


Document Builder - Relational page.

Viewing Records Mapped to Documents

The Document Builder - Relational page features a Relational Details section where you can view the PeopleSoft record mapped to the document.

By default, the Relational Details section is collapsed. To expand the section, click the arrow icon next to the Relational Details label. The following example shows the section expanded:



Document Builder - Relational page with expanded Relational Details section.

The previous example shows that the PeopleSoft record *ITEMS* is mapped to the *Line_Items* document.

When a PeopleSoft record is mapped to a document, all the elements in the document must be mapped to fields in the record.

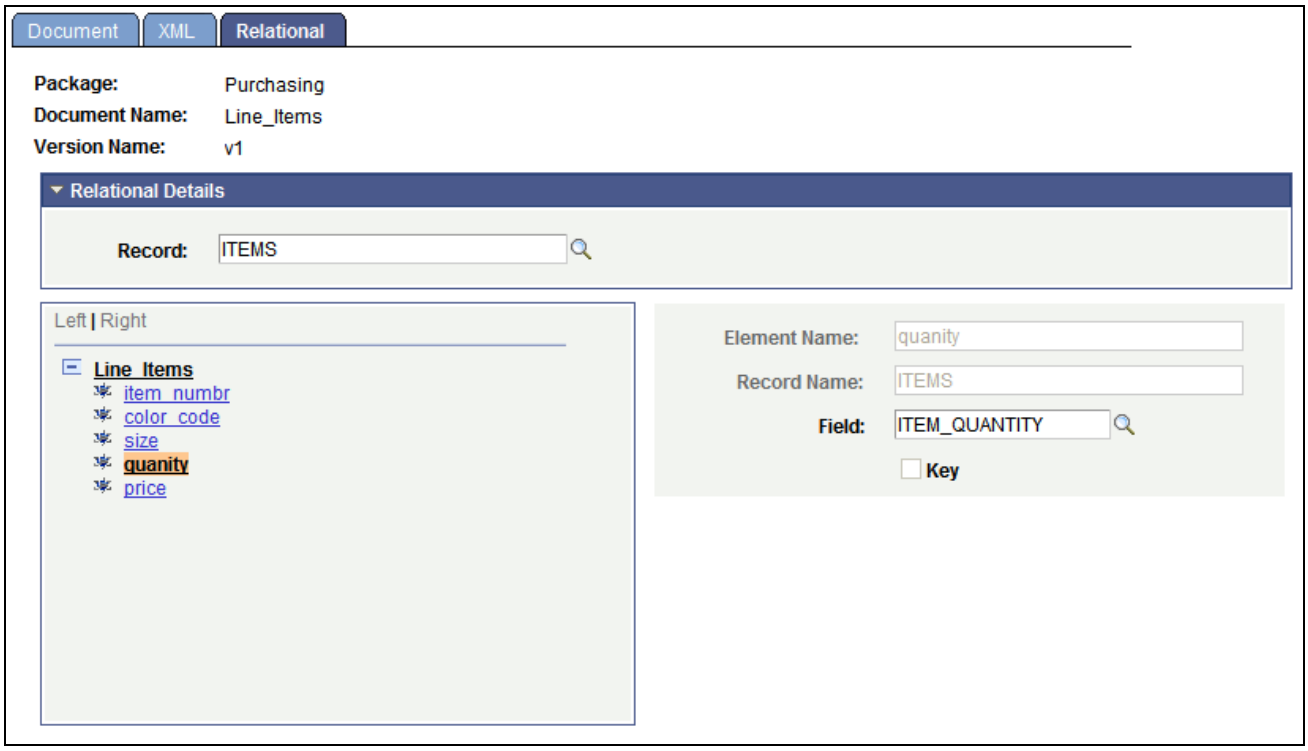
The following section describes how to view record fields that are mapped to document elements.

Viewing Record Fields Mapped to Document Elements

As described in the previous section, if a PeopleSoft record is mapped to a document, then all document elements must be mapped to a field in the record.

To view the record fields that are mapped to document elements, you select an element name in the document tree, and the field mapped to the element appears to the right of the document tree.

The following example shows the mapping of a record field to a document element:



Document Builder - Relational page showing the element *quantity* mapped to the*ITEM_QUANTITY* field in the *ITEMS* record.

Chapter 5

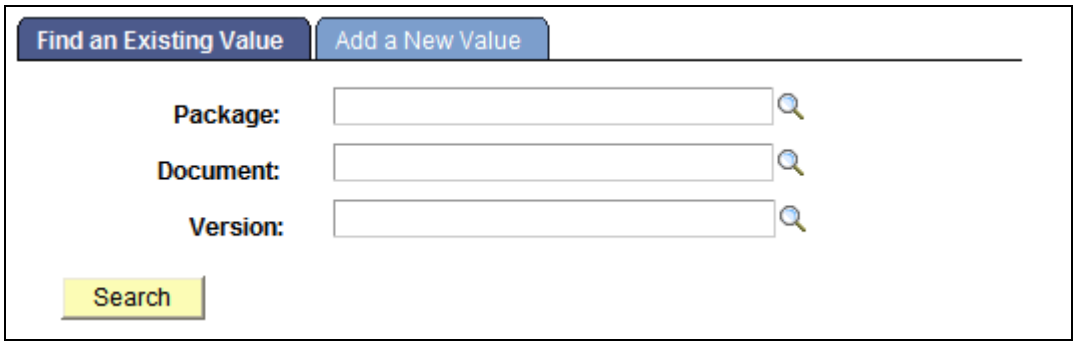
Searching For and Adding Documents

This chapter discusses how to:

- Search for document definitions.
- Add document definitions.

Searching for Document Definitions

Use the Document Builder search page to locate document definitions in the database. To access the Document Builder search page, select PeopleTools, Documents, Document Builder and click the Find an Existing Value tab. The following example shows the page:



Find an Existing Value page.

You can locate a document in the system by searching by one or more of the following attributes: package name, document name, and version number. To specify an attribute, enter the value in the corresponding field or click the Lookup button to search from all values in the database.

To search for documents:

1. Access the Document Builder search page (PeopleTools, Documents, Document Builder).

   The search page appears.

2. Click the Find an Existing Value tab if it is not already selected.

3. Enter a value in one or more of the following fields:

    a. In the Package field, enter the package name or click the Lookup button to search for a value.

    b. In the Document field, enter the document name or click the Lookup button to search for a value.

    c. In the Version field, enter the document version or click the Lookup button to search for a value.

    Note. To display all document definitions in the database, leave all fields blank and click the Search button.

4. Click the Search button.

    The search results appear in the Search Results grid at the bottom of the page.

5. In the Search Results grid, locate and click the document with which to work.

The document definition appears in the Document Builder.

Adding Document Definitions

This section provides information about naming documents and discusses how to add document definitions to the system.

Understanding Naming Document Definitions and XML Root Tag Names

By default, the document name you specify when you add a document to the system also becomes the name of the XML root tag that appears in XML document schema. However you can specify a different root tag name on the XML tab in the XML Schema Details section in the Root Tag field.

The character field limit for document names is 100 characters. The character field limit for root tag names is 30 characters.

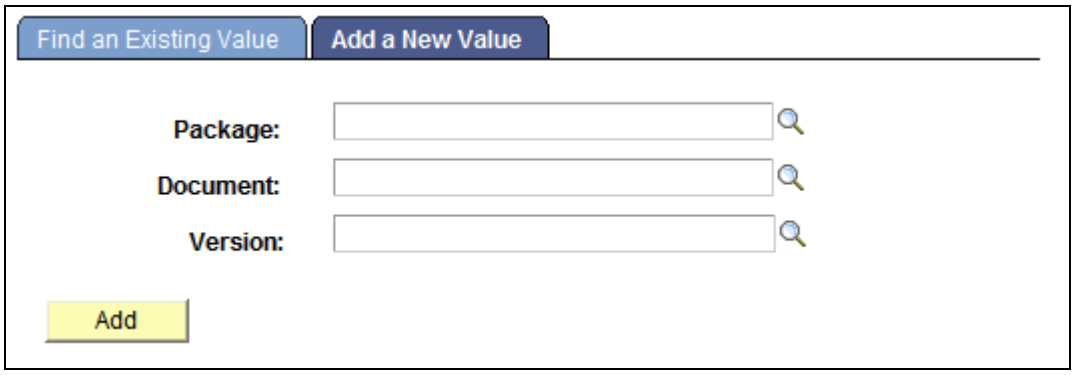
If the document name exceeds 30 characters, the system automatically populates the Root Tag field with only the first 30 characters of the document name. However, the full document name, up to the document name character limit of 100, appears in the generated XML document schema. The exception is if you modify the Root Tag field; if you choose to do so, that value is used as the root tag element in generated schema.

See Also

Chapter 7, "Managing XML- and Relational-Formatted Documents," Defining XML Schema Details, page 57

Adding Documents

Use the Document Builder Add a New Value page (IB_MSGSEARCH_ADD) to add a new document to the database. To access the page, select PeopleTools, Documents, Document Builder and click the Add a New Value tab. The following example shows the Document Builder Add a New Value page:



Add a New Value page.

After you complete naming the document, you must click the Add button and add at least one child element to the document before you can save it in the database.

To add a document definition:

1. Access the Document Builder Search page (PeopleTools, Documents, Document Builder).

   The search page appears.

2. Click the Add a New Value tab.

3. In the Package field, enter a package name.

   The package name is limited to 100 characters.

4. In the Document field, enter a document name.

   By default, the value you enter in this field becomes the XML root element name for the document.

   Information to consider about naming documents, including character limits, is discussed elsewhere in this chapter.

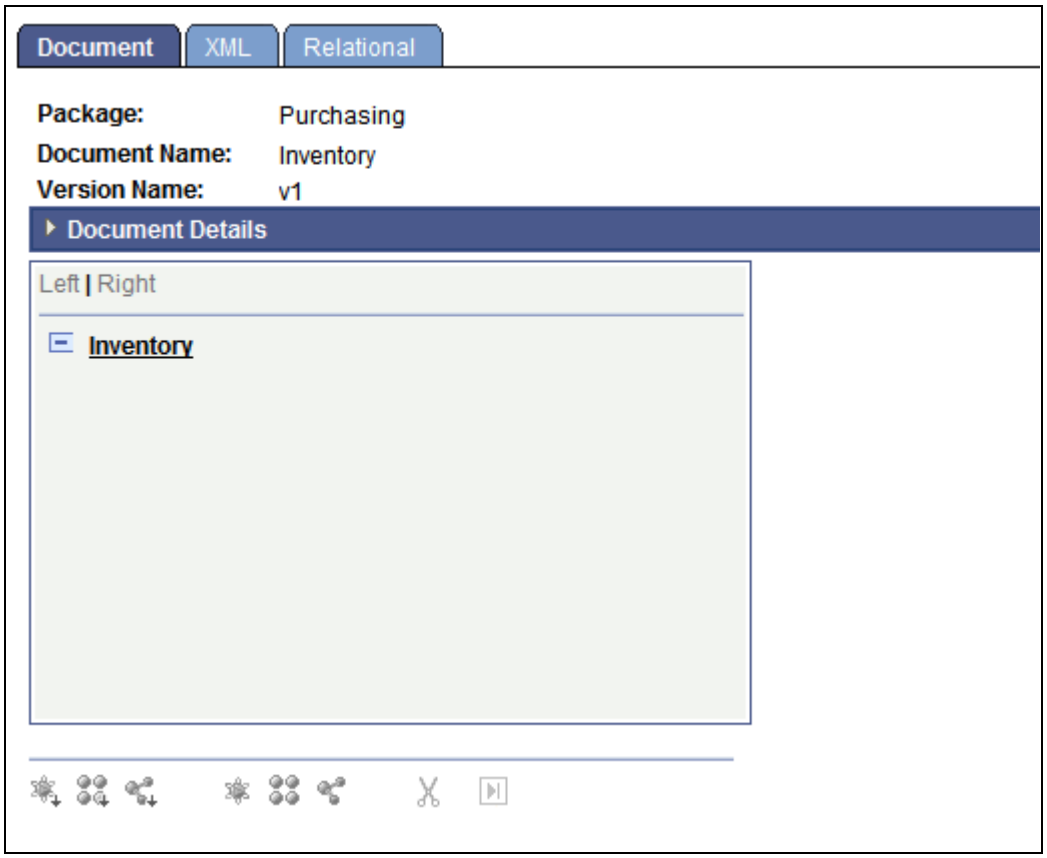
   See Chapter 5, "Searching For and Adding Documents," Understanding Naming Document Definitions and XML Root Tag Names, page 28.

5. In the Version field, enter a document version.

   The version is limited to 30 characters.

6. Click the Add button.

The document definition appears in the Document Builder - Document page as shown in the following example:



Document Builder - Document page showing a new document definition.

When you create a new document, the root element appears in the document tree. However, the definition is not yet saved in the database. You must add at least one child element to the document before you can save it in the database.

Chapter 6

Adding Elements to Documents

This chapter provides an overview of element types and data types and discusses how to:

- Use the elements action toolbar.
- Manage primitive elements.
- Manage compound elements.
- Manage collection elements.

Understanding Element Types and Data Types

This section describes the element types and element data types that the PeopleSoft system supports as part of its document framework.

Note. The term and concept of elements described in this chapter refers to node elements.

Element Types

When you manage documents in the PeopleSoft system, you can add and manage root elements, child elements, and peer elements.

The first element that appears in a document is the root element. A document can have only one root element. When you create a new document, the system automatically creates a root element and uses the document name as the root element name.

Data Types

This section discusses the data types that PeopleSoft supports.

Primitive

PeopleSoft supports the primitive data types in the following list. You may use primitive data types in child and peer elements.

- Binary
- Boolean
- Character
- Date
- DateTime
- Decimal
- Integer
- String
- Text
- Time

Compound

A compound data type can be a PeopleSoft record, complex primitive data type, or another document.

Complex primitive

A complex primitive data type is a primitive data type that can contain attributes.

With this data type, the system-generated XML creates the element tag with the associated attributes as a sibling instead of a child.

Collection

Collection elements represent multiple occurrences of a single type, similar to an array or a set.

See Also

Chapter 6, "Adding Elements to Documents," Defining Primitive Element Properties, page 37

Chapter 6, "Adding Elements to Documents," Managing Compound Elements, page 43

Chapter 6, "Adding Elements to Documents," Managing Collection Elements, page 53

Using the Elements Action Toolbar

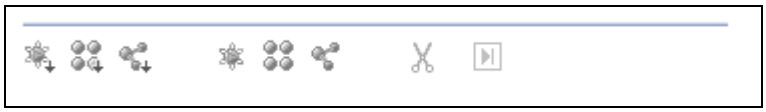
This section discusses how to:

- Access and enable the action toolbar.
- Use the action toolbar buttons.

Accessing and Enabling the Action Toolbar

Use the action toolbar to select element types and data types to add to a document.

The elements action toolbar appears on the Document Builder - Documents page under the document tree. This example shows the action toolbar:



Elements action toolbar.

Hover over any button to display the element type that you can add to the system

Child Element Action Buttons

The first set of three buttons highlighted in the following example enable you to add child element types to a document:

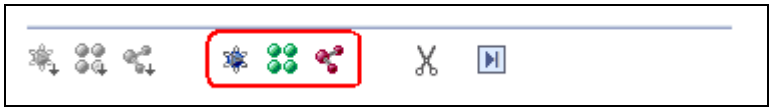
Child element buttons on the action toolbar.

The following table lists the child element buttons in the order they appear on the toolbar and the action you can perform with each:

	Add primitive child.
	Add collection child.
	Add compound child.

Peer Element Action Buttons

The second set of three buttons highlighted in the following example enable you to add peer element types to a document:



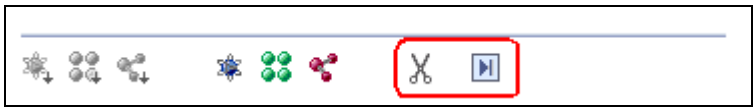
Peer element buttons on the action toolbar.

The following table lists the peer element action buttons in the order they appear on the toolbar and the action you can perform with each:

	Add primitive peer.
	Add collection peer.
	Add compound peer.

Delete and Move Element Action Buttons

The following example highlights the action toolbar buttons you can use to delete and move elements in the document tree:



Action toolbar buttons for deleting and moving elements.

The following table describes the action buttons you can use to delete and move elements in the document tree:

	Delete element.
	Move element to the bottom of the tree.

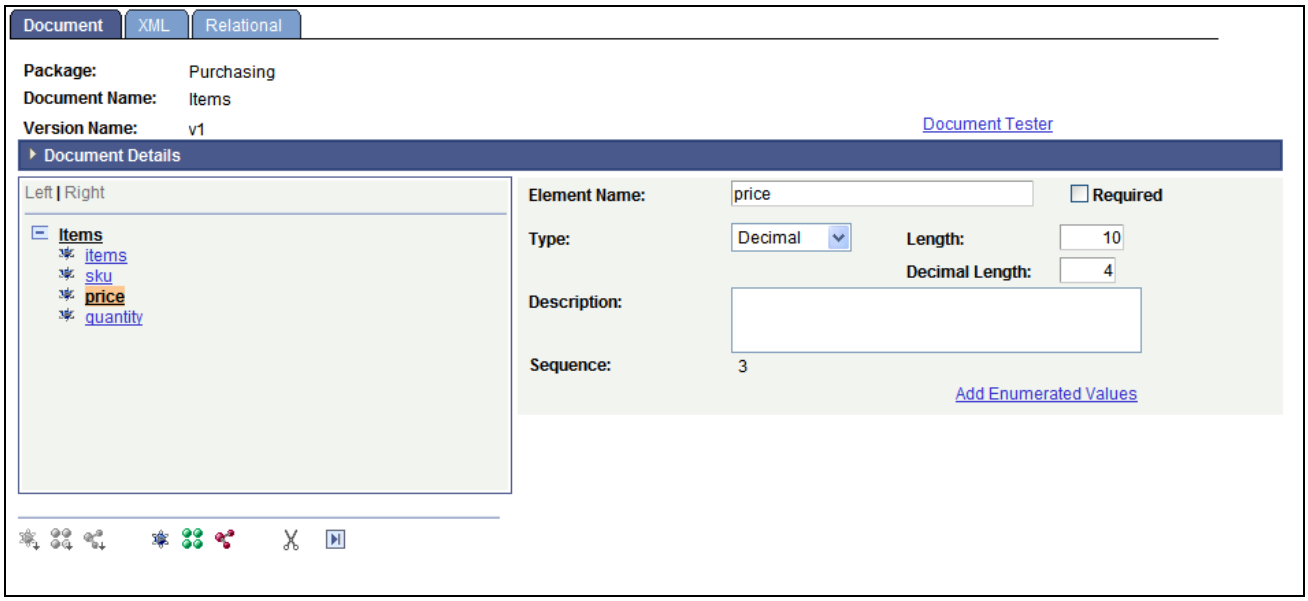
Accessing and Enabling the Action Toolbar

To access the action toolbar, select PeopleTools, Documents, Document Builder and then select a document or create a new document.

The following example shows a document definition named *Items.* The action toolbar appears under the document tree section:

The action toolbar appears under the document tree section.

The action toolbar is not enabled until you click an element in the document tree. In the previous example, the action toolbar is not enabled since no element is selected. The following example shows the *price* element of the *Item* document selected and the action toolbar enabled:



The action toolbar becomes enabled when you select an element in the document tree

When you click an element, the element types and data types that you can add are enabled on the toolbar. If an element or data type is not enabled on the toolbar, either you have not selected an element to which to add an element or you are not allowed to add the element type or data type to the document tree at that time.

When you select the root element on the document tree, the Dependencies section appears. Document dependencies are discussed elsewhere in this PeopleBook.

See Chapter 4, "Navigating in the Document Builder," Viewing Document Dependencies, page 17.

When you select any other element type on the document tree, the properties defined for the element appear on the right side of the page, as shown in the previous example. Defining element properties is discussed elsewhere in this chapter.

See Also

Chapter 6, "Adding Elements to Documents," Defining Primitive Element Properties, page 37

Chapter 6, "Adding Elements to Documents," Managing Compound Elements, page 43

Chapter 6, "Adding Elements to Documents," Managing Collection Elements, page 53

Managing Primitive Elements

This section provides an overview of adding elements to documents and discusses how to:

- Add primitive elements.
- Define primitive element properties.
- Add enumerated values.

Understanding Adding Elements to Documents

You build out a document structure by adding elements to a document tree.

Use the action toolbar on the Document Builder - Documents page to add elements to documents. As described elsewhere in this chapter, the Action Toolbar features buttons to add primitive, compound, and collection elements, both child and peer elements, to documents.

Note. After you add an element to a document, you must define the element properties before you can save the document.

Adding Primitive Elements

To add primitive elements (child or peer) to documents:

1. Access the Document Builder - Documents page (PeopleTools, Documents, Document Builder).
2. On the document tree, click the element to which to add a primitive child or primitive peer element.
3. On the action toolbar, do one of the following:
    - Click the Add Primitive Child button to add a primitive child element.
    - Click the Add Primitive Peer button to add a primitive peer element.

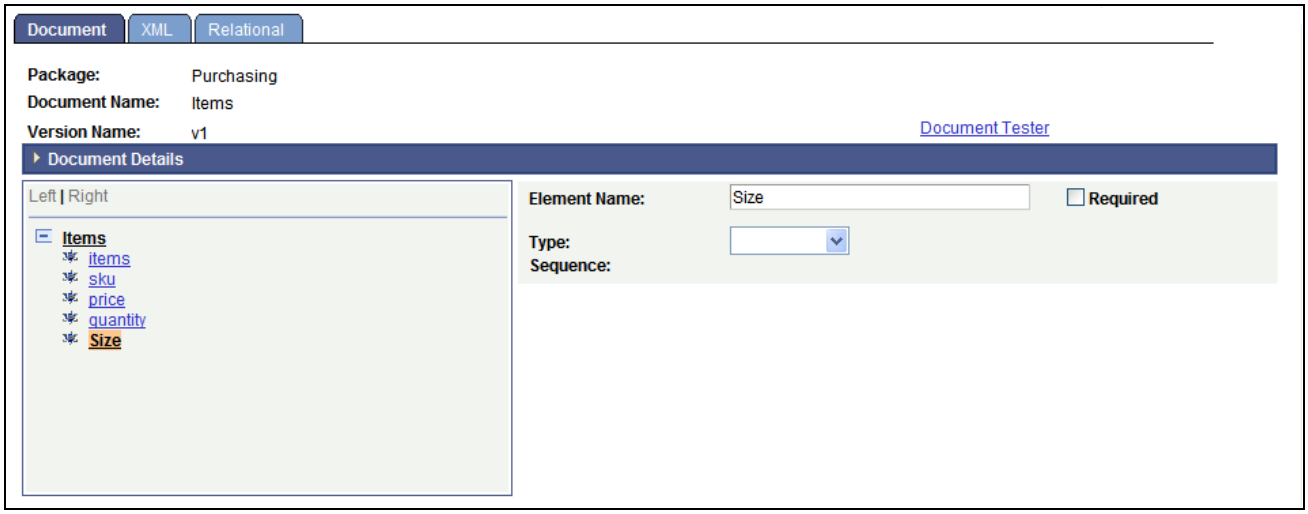
The element appears on the document tree and you may define its properties.

See Chapter 6, "Adding Elements to Documents," Defining Primitive Element Properties, page 37.

Defining Primitive Element Properties

When you add a primitive element data type to a document, the properties that you can define for the element appear on the right side of the Document Builder - Document page.

To access the page, select PeopleTools, Documents, Document Builder. The right side of the following example shows the primitive data type properties section:



Primitive data type properties section on the Document Builder - Document page.

The following table describes the properties that you can define for primitive data type elements. Except where noted, the properties in the table are applicable to all primitive data type supported by the system:

Add Enumerated Values and **Show Enumerated Values**

Click the link to define accepted values and their descriptions for a data type.

You can define enumerated values for the following primitive data types: Character, Date, DateTime, Integer, String, and Time.

See Chapter 6, "Adding Elements to Documents," Adding Enumerated Values, page 40.

Date/Time Format

From the drop-down list, select one of the following ISO standard date/time format options:

- THH:MM:SS.ssssss+/-hhmm
- THH:MM:SS.ssssss+/-hh:mm

Decimal Length

Enter the number of digits to include to the right of the decimal point.

This property is applicable to the Decimal primitive data type.

Description	Enter a long description of the element.
Element Name	Enter the name of the element as it will appear in the XML document.
Length	Enter a length for the element. This property is applicable to the following primitive data types: Binary, Character, Decimal, Integer, String, and Text.
Required	Select the check box to indicate that the element must be included in runtime XML and defined as a required element in the XML schema.
Sequence	The system assigns this read-only field. The sequence number is used for indexing with the PeopleCode API for documents.

Sub-Type

Select a value from the drop-down list box to further define the data type.

This property is applicable to the following primitive data types: Integer, String and Text.

The valid values for these data types are:

- Integer.
  - None. (Default.)
  - nonNegativeInteger.
- String.
  - None. (Default.)
  - QName.
  - anyURI.
  - gDay.
  - gMonth.
  - gYear.
  - gYearMonth.
  - normalizedString.
  - token.
- Text.
  - None. (Default.)
  - QName.
  - anyURI.
  - gDay.
  - gMonth.
  - gYear.
  - gYearMonth.
  - normalizedString.
  - token.

Type

From the drop-down list box, select a primitive data type.

The valid values are discussed elsewhere in this chapter.

See Chapter 6, "Adding Elements to Documents," Data Types, page 31.

Unbound Maximum	Select the check box to indicate that the length of the element is unlimited. This property is applicable only to the binary primitive data type.

Adding Enumerated Values

You can define allowed values, or *enumerated values,* for some primitive data types.

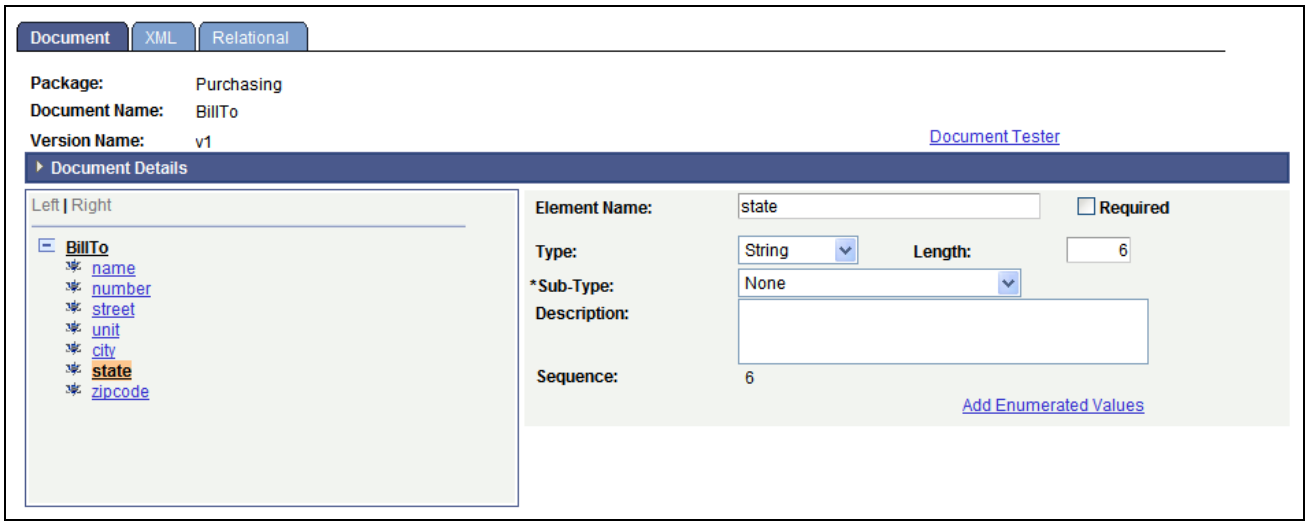
An example of enumerated values is a list of acceptable state abbreviations that can be used in a primitive element called State that is a string.

In the Documents Builder, you can define enumerated values for the following primitive data types:

- Character.
- Date.
- DateTime.
- Integer.
- String.
- Time.

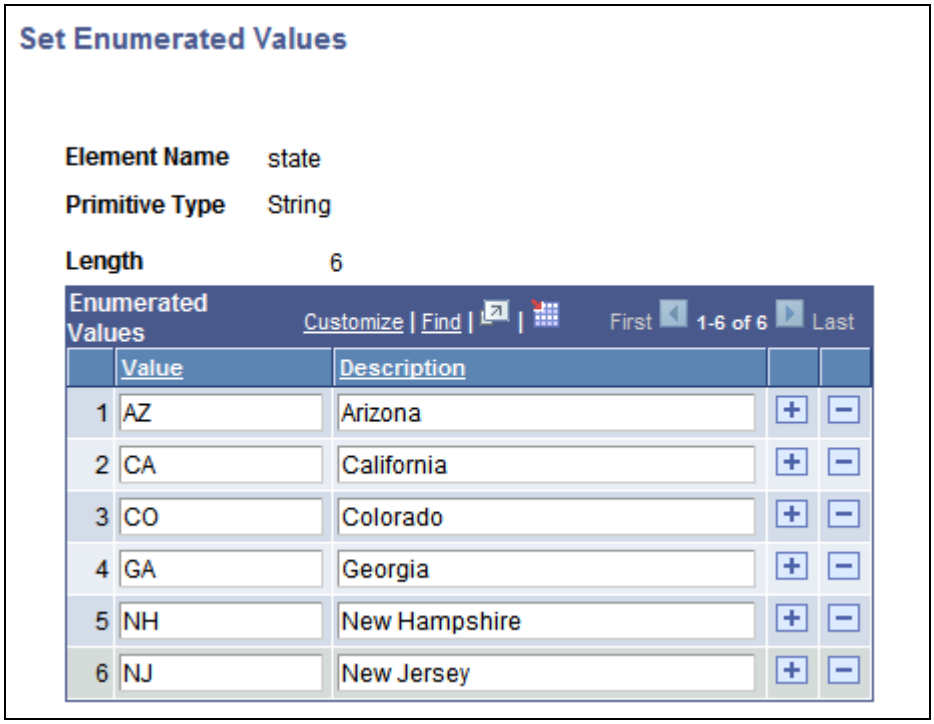
Use the Set Enumerated Values page (IB_ENUM_SEC) to set enumerated values. You access the page by using the Add Enumerated Values link that appears on the Document Builder - Documents page when you define properties for one of the primitive data types in the previous list.

The following example shows the Add Enumerated Values link that appears when you define a primitive element called *State* that is a string:



Example of the Add Enumerated Value link under the element properties.

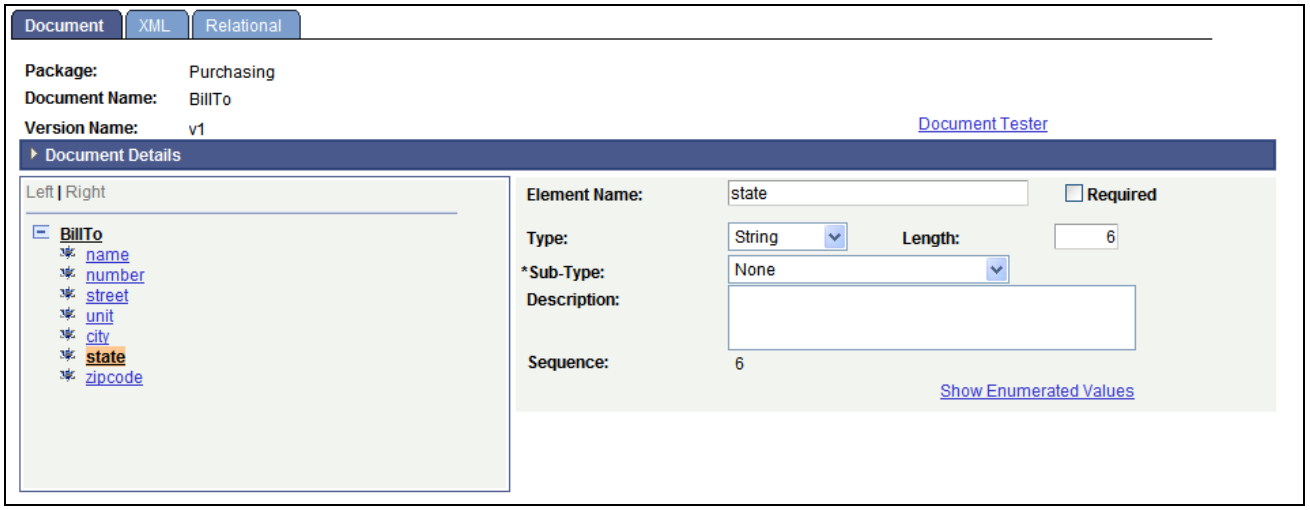
Click the Add Enumerated Value link to access the Set Enumerated Values page. The following example shows the page:



Set Enumerated Values page for the State element.

To set enumerated values, enter an acceptable value in the Value field and then a description for the value in the Description field. In the previous example, the Value column shows the acceptable abbreviations and values that the State element can contain for several of the United States. The Description field shows information about each of the values.

When enumerated values exist for a primitive data type, when you are working in the properties section a Show Enumerated Values link appears instead of a Set Enumerated Values link. The following example shows the properties section for the State element after enumerated values are defined. Note that a Show Enumerated Values link appears:



The Show Enumerated Values link appears after enumerated values are defined.

To set enumerated values:

1. Select PeopleTools, Documents, Documents Builder.

   The Documents Builder - Documents page appears.

2. In the document tree, select the element for which to add enumerated values.

   The properties for the element appear on the right side of the page.

3. Perform one of the following actions:

   a. Click the Add Enumerated Values link to add values.

      This link appears if no enumerated values are defined for the element.

   b. Click the Show Enumerated Values link to modify existing values.

      This link appears if enumerated values are already defined for the element.

4. Enter enumerated values and descriptions:

   a. In the Value field, enter an acceptable value for the element.

   b. In the Description field, enter a description for the value.

5. Click the plus button (+) to add additional rows of values and descriptions.

6. Click the OK button.

   The Documents Builder - Document page appears.

Managing Compound Elements

This section provides an overview of compound data types and discusses how to:

- Add compound elements.
- Define complex primitive data types.
- Define documents as compound element data types.
- Define PeopleSoft records as a compound element data types.

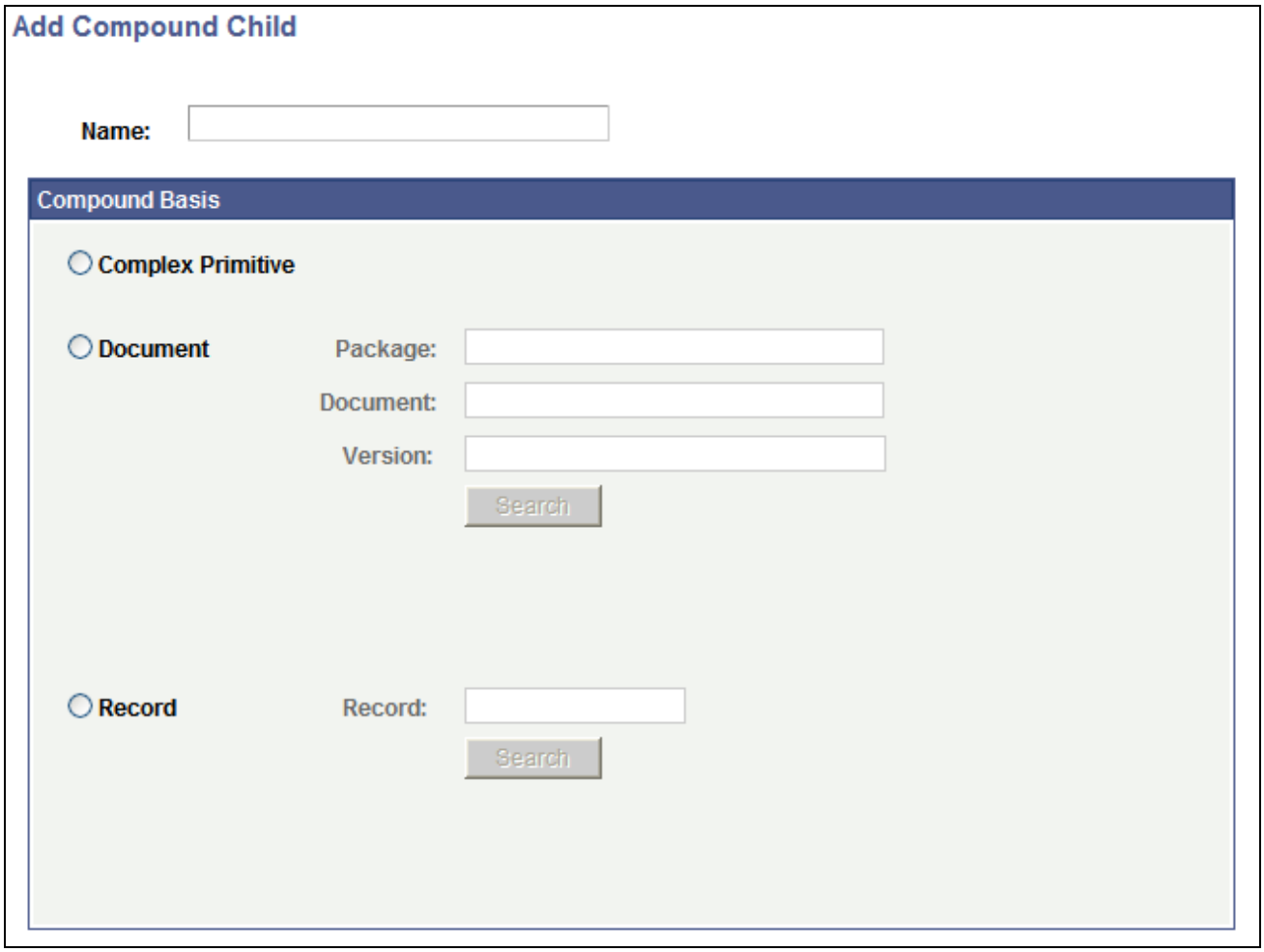
Understanding Defining Compound Data Types

A compound data type can be a complex primitive data type, another document, or a PeopleSoft record.

Adding Compound Elements

When you add a compound data type to the document tree, the Add Compound Child or Add Compound Peer page appears, depending on whether you are adding a child or peer element. The Add Compound Child page and the Add Compound Peer page are identical and have the same object name, IB_LOGICALCOMP_SEC.

The following example shows the Add Compound Child page:



Add Compound Child page.

To add compound elements (child or peer) to documents:

1. Access the Document Builder - Documents page (PeopleTools, Documents, Document Builder).
2. On the document tree, click the element to which to add a compound child or compound peer element.
3. On the action toolbar, do one of the following:
   - Click theAdd Compound Child button to add a compound child element.
   - Click the Add Compound Peer button to add a compound peer element.

     The Add Compound Child page or Add Compound Peer page appears.
4. In the Name field, enter a name for the compound element.

5. Select the type of compound element to create. The options are:

   - Complex Primitive

     When you select this option, the Document Builder - Documents page appears for you to define the element properties.

     See Chapter 6, "Adding Elements to Documents," Defining Complex Primitive Data Types, page 45.

   - Document

     When you select this option, you search for and specify the document to use as the compound element.

     See Chapter 6, "Adding Elements to Documents," Defining Documents as Compound Element Data Types, page 48.

   - Record

     When you select this option, you search for and specify the PeopleSoft record to use as the compound element.

     See Chapter 6, "Adding Elements to Documents," Defining PeopleSoft Records as Compound Element Data Types, page 50.

Defining Complex Primitive Data Types

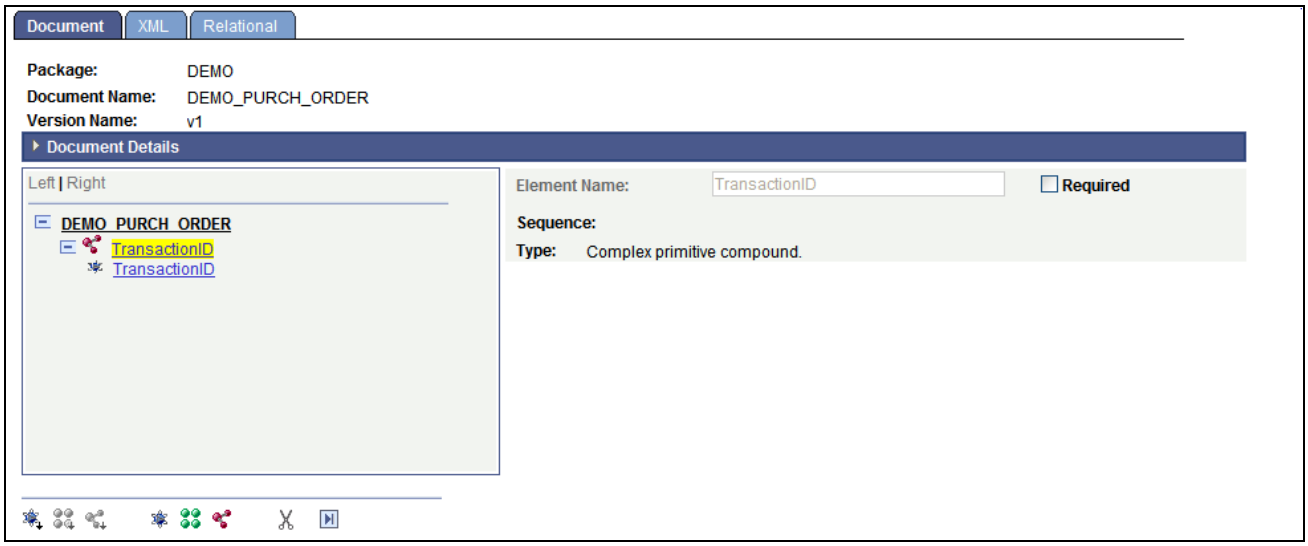
This section discusses how to:

- Define properties for complex primitive elements.
- Define attributes element properties.
- Add additional attribute elements to complex primitive data types.

Defining Properties for Complex Primitive Elements

After you create and name a complex primitive data type, two elements appear in the document tree on the Document Builder - Documents page. One element is for the complex primitive and the other is for the first of one or more element attributes.

The following example shows a newly created complex primitive element (and attribute) element appearing in the document tree:



TransactionID is a complex primitive element off of the root element.

The complex primitive element is denoted by a complex primitive icon to the left of the element name. In addition, it is highlighted. The attribute is denoted by the primitive icon to the left of the name.

In the example, the complex primitive element is highlighted, and the properties appear on the right side of the page. They are:

Element Name The name of the element as defined on the Add Compound Child or Add Compound Peer page.

This value is read-only.

Required Select the check box to make the element a required element.

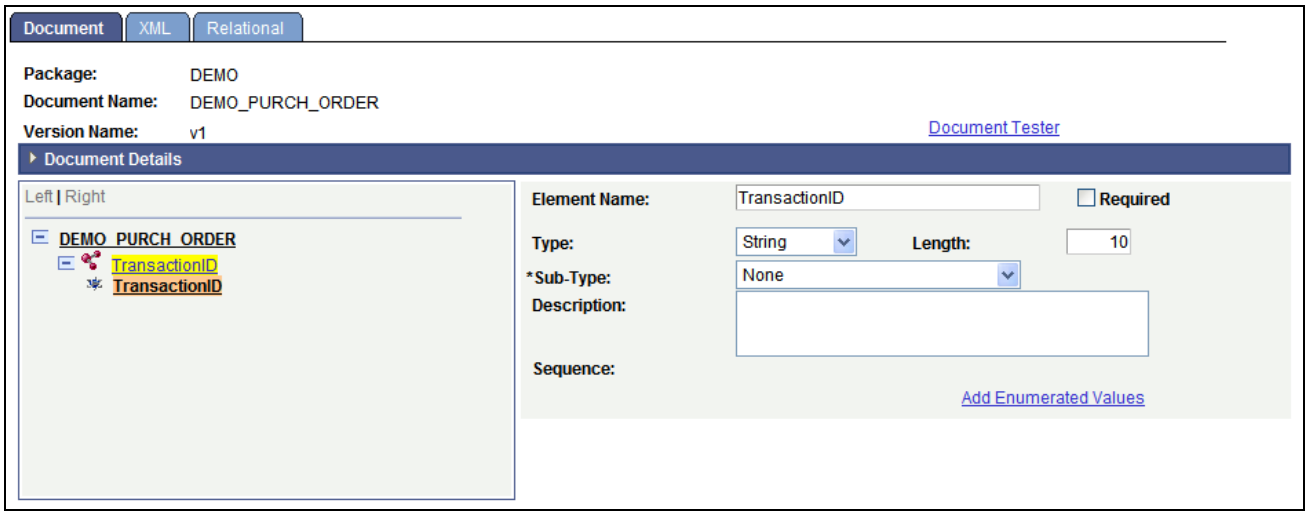
Sequence The system assigns this read-only field. The sequence number is used for indexing with the PeopleCode API for documents.

Type This field displays the element type.

Defining Attributes Element Properties

Properties you define for an attribute element appear when you select an element in the document tree.

The following example shows the attribute element *TransactionID* selected in the tree:



Example of specifying the TransactionID attribute element properties.

When you select an attribute element, the properties you can define for it appear on the right side of the page.

To specify attribute element properties:

1. In the document tree, select an attribute element.

   The attribute element properties appear on the right side of the page.

2. In the Element Name field, enter the name of the element as you want it to appear in the generated XML.

   If you change this name, the complex primitive element and attribute element name changes to the value you enter.

3. Select the Required check box to make the attribute a required element.

4. From the Type drop-down list box, select an element type.

   Primitive element types are described elsewhere in this chapter.

   See Chapter 6, "Adding Elements to Documents," Defining Primitive Element Properties, page 37.

5. Click the Save button.

Adding Additional Attribute Elements to Complex Primitive Data Types

You can add the following element types as attribute elements to complex primitive data types:

- Primitive child.
- Primitive peer.
- Compound peer.
- Collection peer.

You add these elements to complex primitives as you would any other element, first using the action toolbar on the Document Builder - Documents page to add the element to the document tree, and then defining the element properties.

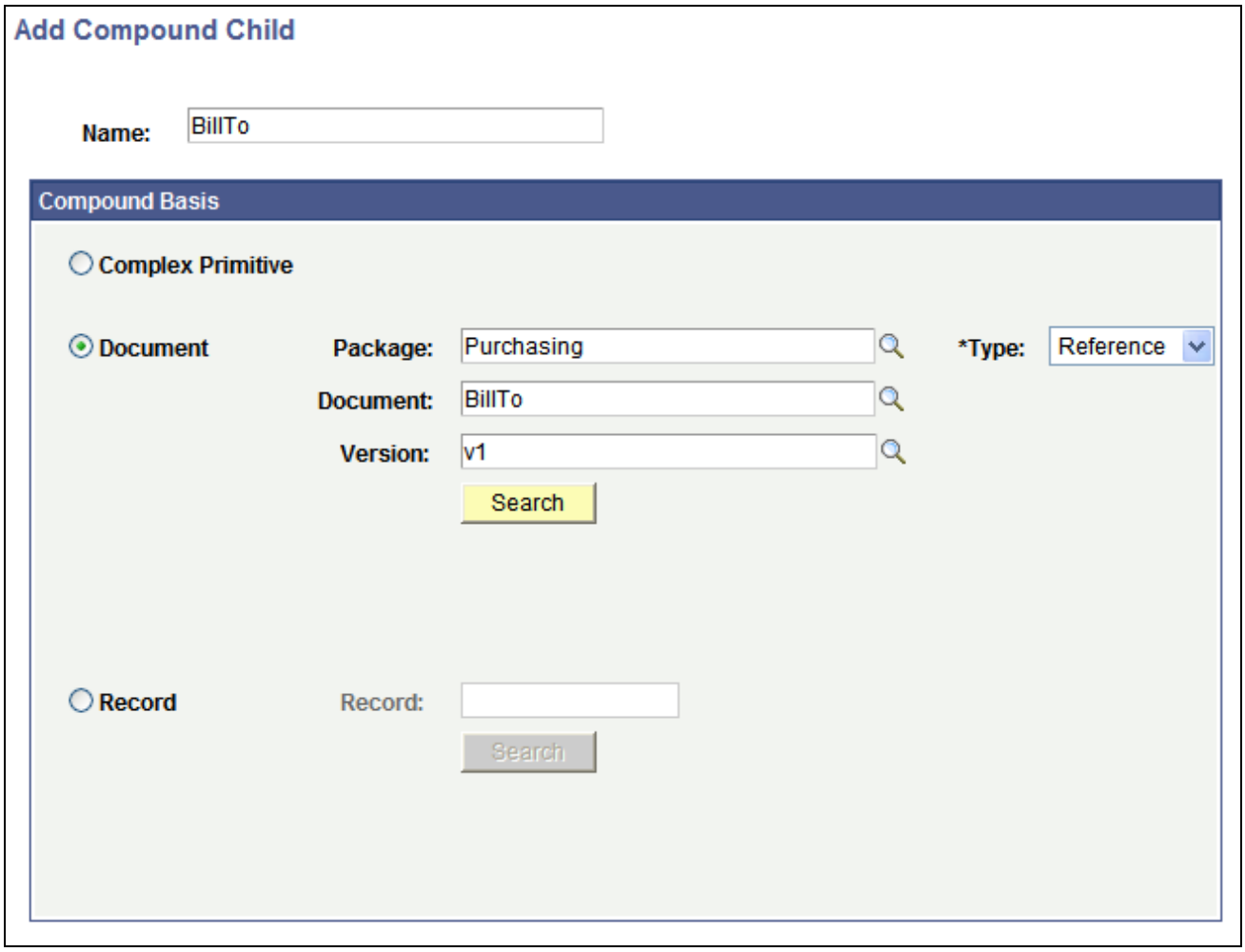
See Chapter 6, "Adding Elements to Documents," Managing Primitive Elements, page 36; Chapter 6, "Adding Elements to Documents," Managing Compound Elements, page 43 and Chapter 6, "Adding Elements to Documents," Managing Collection Elements, page 53.

Defining Documents as Compound Element Data Types

After you create and name a document as the data type for a compound element, you specify the document package, document name, and document version on the Add Compound Child or Add Compound Peer page (IB_LOGICALCOMP_SEC).

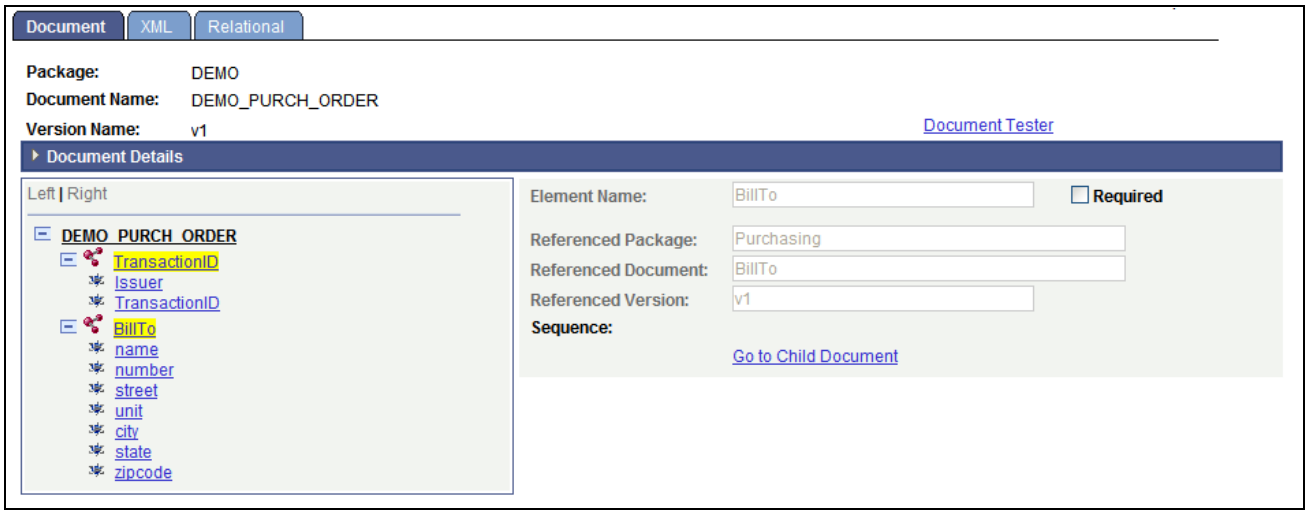
When you specify a document as the compound element data type, you can select to use a reference of the document or a copy of the document. Using a reference of the document means that if the document defined as the compound element type is modified, then the changes will be rolled into that document. Using a copy of the document means that the document you define as the compound element type will remain the same, even if the original document is modified in the future.

This example shows specifying the document to add as a compound element data type:



Specifying the Document to add as a compound element data type on the Add Compound Child page.

After you search for and select a document, the Document Builder - Documents page appears, and the document appears as a compound element in the document tree. The following example shows the *BillTo* document added as a compound element to the *DEMO_PURCH_ORDER* document:



Example of the BillTo document as a compound element in the DEMO_PURCH_ORDER document tree.

After you create a document as a compound element data type, the document element information appears on the right side of the page. A Go to Child Document link also appears. When you click the Go to Child Document link, the document definition for the compound element appears in a new window.

To define a document as a compound element data type:

1. Create and name a document as a data type for a compound element.

   See Chapter 6, "Adding Elements to Documents," Adding Compound Elements, page 43.

2. In the Type drop-down list box, select an option:

   - *Reference.* (Default.)

     Use a reference of the document.

   - *Copy.*

     Use a copy of the document.

3. Specify the document:
    a. In the Package field, enter the document package name or click the Lookup button to search for one.
    b. In the Document field, enter the document name or click the Lookup button to search for one.
    c. In the Version field, enter the document name or click the Lookup button to search for one.
    d. Click the Search button.

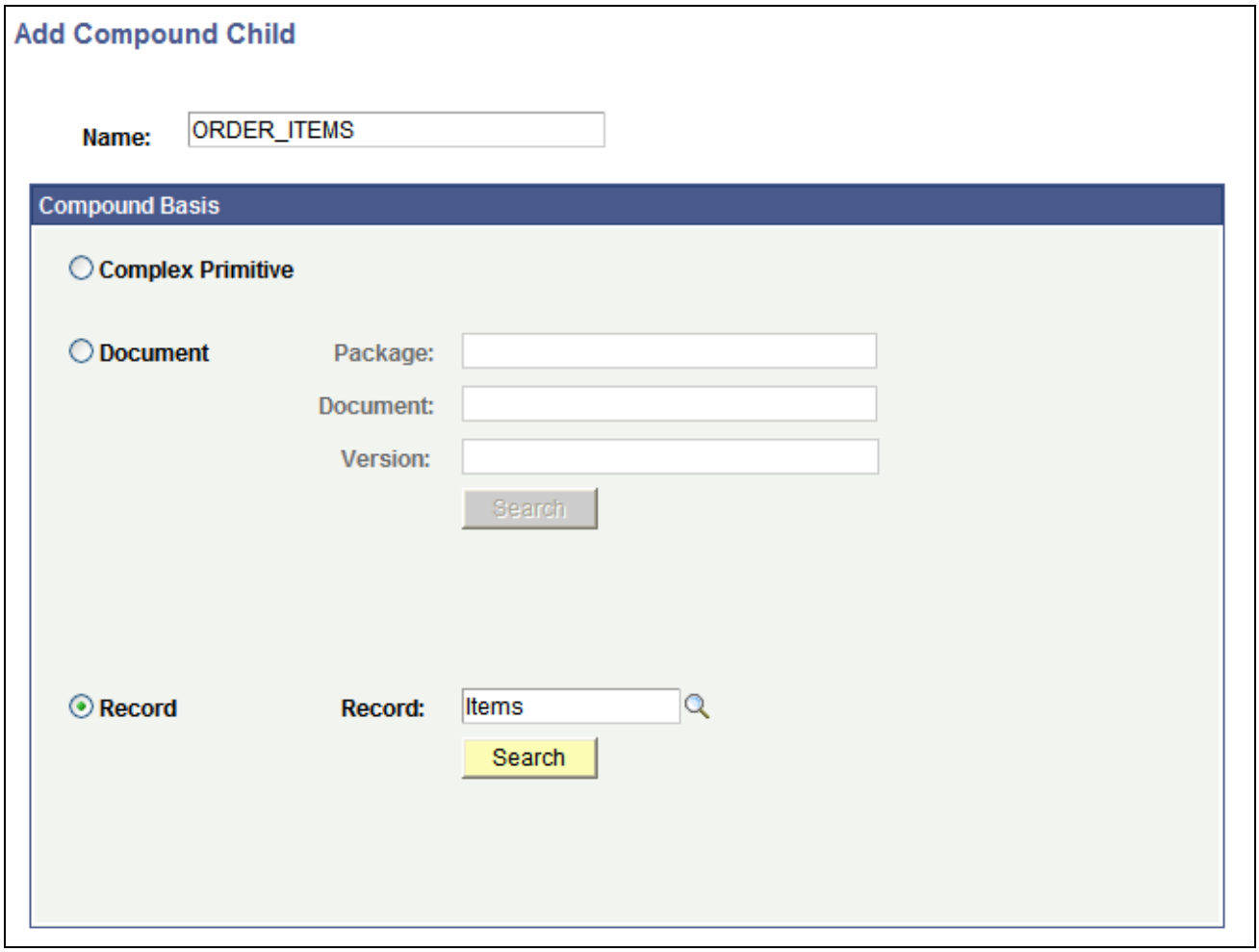
        The search results appear in the Document List grid.
    e. Select a document from the list.

        The Document Builder - Documents page appears, and the document you specified appears in the document tree.
4. Click the Save button.

Defining PeopleSoft Records as Compound Element Data Types

After you name a compound element and choose to create a PeopleSoft record data type, you must search for and select the record. As with other compound data types, you use the Add Compound Child or Add Compound Peer page (IB_LOGICALCOMP_SEC), depending on whether you are creating a compound child or compound peer element.

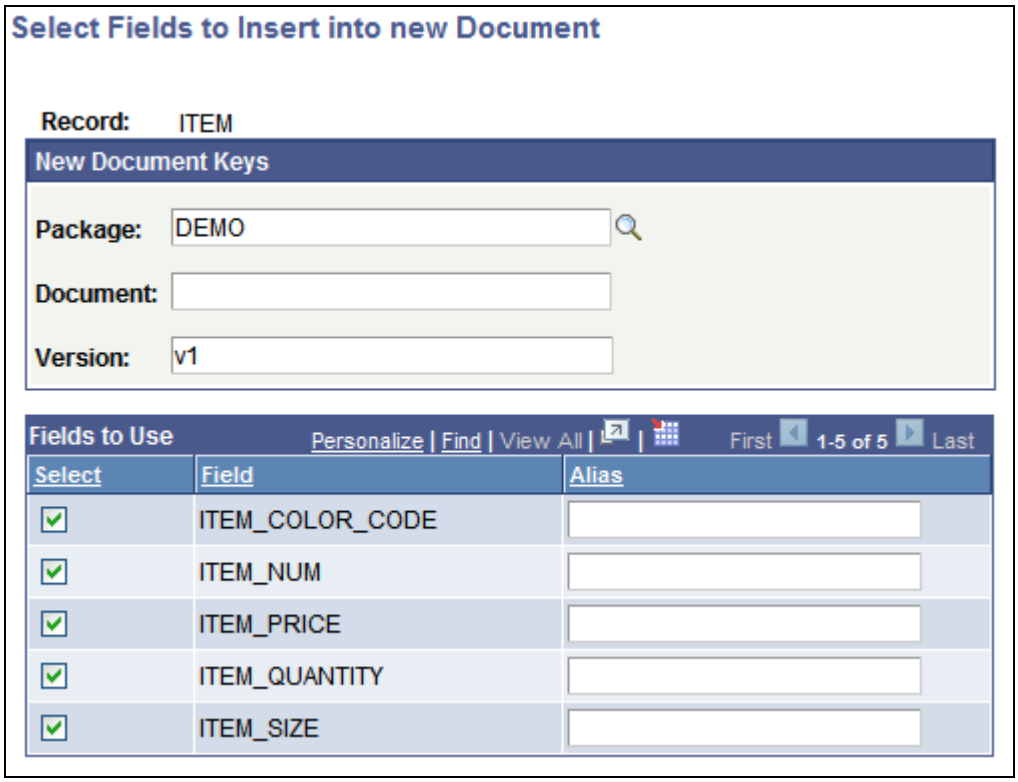
The following example shows the Add Compound Child page when searching for a PeopleSoft record:



Example of searching for a PeopleSoft record to use as a compound element on the Add Compound Child page.

After you enter search criteria, the results appear in the Records grid. When you select a record from the grid, the Select Fields to Insert into New Document page (IB_LOGICALFLD_SEC) appears. Use the page to select the fields to include in the document. The fields become primitive elements in the document, and the record fields properties, such as data type and length, become the default primitive element properties in the document.

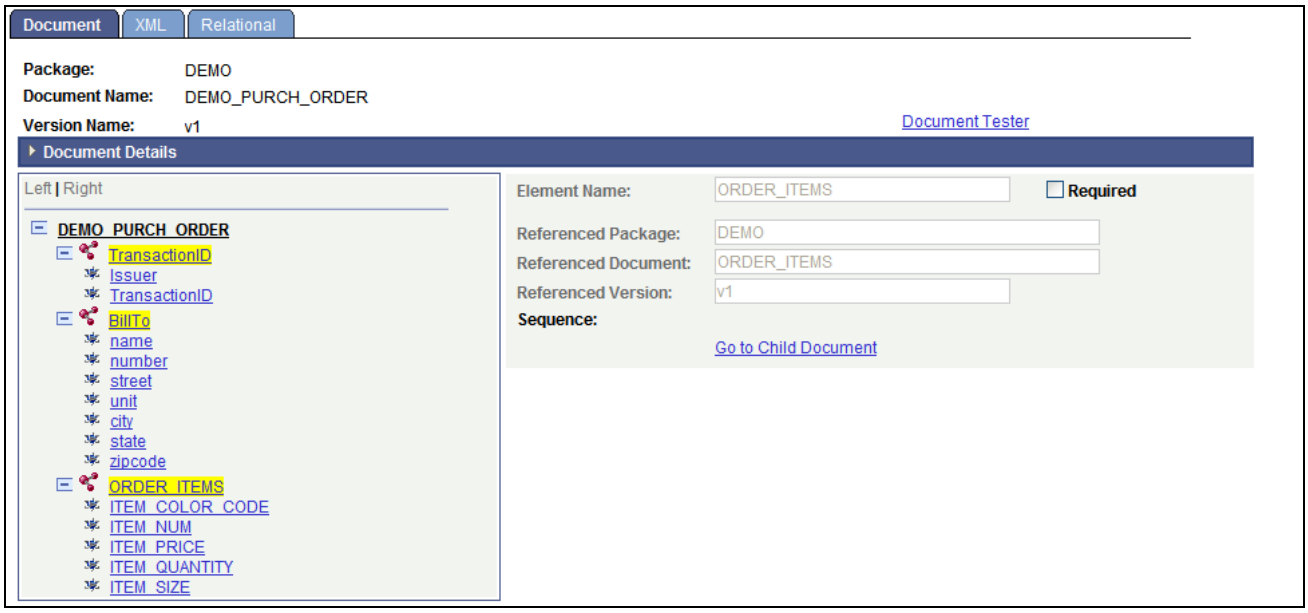
The following example shows the Select Fields to Insert into New Document page for the *ORDER_ITEMS* compound element based on the PeopleSoft record, *ITEMS*:



Selecting the fields to use in the document.

When you save the information, the record and its fields become a compound document element. In the previous example, you see that the system reads the package name and version from the document definition and supplies the document name in the Document field.

After you provide the document name and click the OK button, the new compound document element that you created from a PeopleSoft record appears in the document tree on the Document Builder - Documents page. The following example shows the compound element, *ORDER_ITEMS*, appearing in the document tree:



Example of the compound element ORDER_ITEMS in the document tree.

The previous example shows that the system converted the PeopleSoft *ITEMS* record and its fields into a document called *ORDER_ITEMS*, and that the document is a compound child element of the *DEMO_PURCH_ORDER* document.

Click the Go to Child Document link in the properties section of the page to view and modify the *ORDER_ITEMS* document definition.

Managing Collection Elements

This section provides an overview of managing collection elements and discusses how to:

- Add collection elements.
- Define collection element properties.

Understanding Managing Collection Elements

Only a collection item that is a primitive or compound data type can be added to a collection element. A Collection can have unlimited Collections as siblings.

Adding Collection Elements

Use the Add Collection Child or the Add Collection Peer page, depending on whether you want to create a collection child or collection peer element. The Add Collection Child page and the Add Collection Peer page share the same object page name: IB_LOGICALCOLL_SEC.

You access the Add Collection Child and Add Collection Peer pages using the action toolbar on the Document Builder - Documents page.

The following example shows the Add Collection Child page:

Add Collection Child page.

To add a collection element:

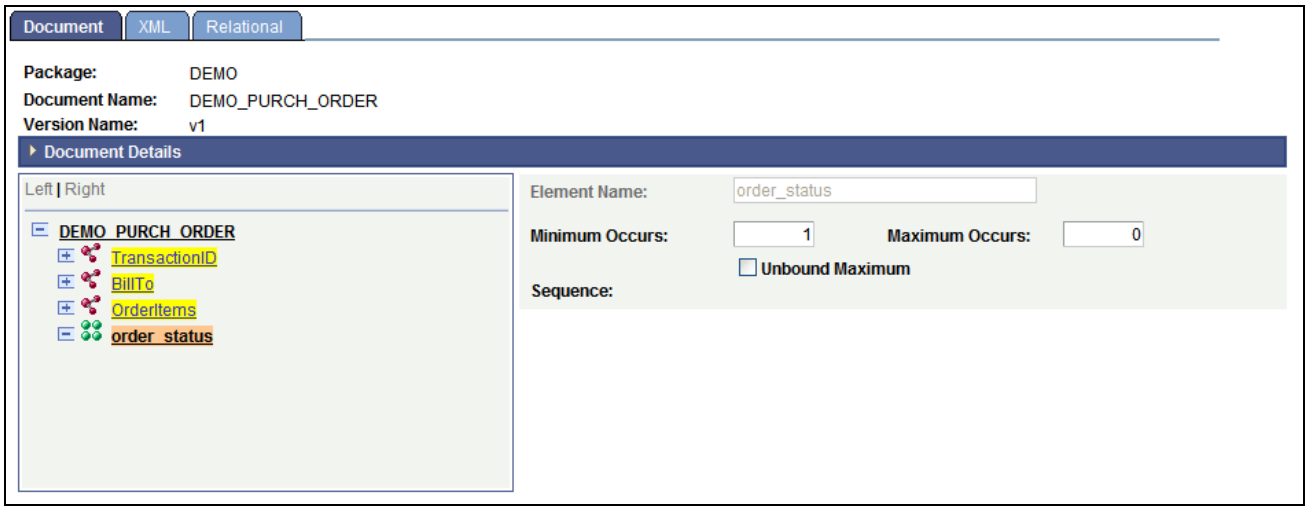
1. Access the Document Builder - Documents page (PeopleTools, Documents, Document Builder).
2. In the document tree, click the element to which to add a collection child or collection peer element.
3. On the action toolbar, do one of the following:
   - Click theAdd Collection Child button to add a collection child element.
   - Click the Add Collection Peer button to add a collection peer element.

   The Add Collection Child or Add Collection Peer page appears, depending on the element you added.
4. In the Element Name field, enter a name for the collection element.
5. Click the OK button.

   The Document Builder - Documents page appears, and the new collection element appears in the document tree. Note that the collection element icon that appears on the toolbar also appears to the left of the collection element in the document tree.

Defining Collection Element Properties

After you add a collection child or collection peer element to a document, the collection element properties appear on the right side of the Document Builder - Documents page. The following example shows the properties for a collection child element called *order_status:*



Properties for the order_status collection child element.

You can define the following collection element properties:

Element Name — Name of the element as it will appear in the XML document.

Min Occurrence (minimum occurrence) — The minimum number of instances when populating the document definition with data.

As an example, entering a 0 (zero) means that you do not have to populate the collection.

Enter the minimum number of occurrences of the collection element in the document.

The default value is *1*.

Max Occurs (maximum occurrence) — This field appears only if the Unbound Maximum field is cleared.

Enter the maximum number of occurrences of the collection element in the document.

Unbound Maximum — Select the check box to include an unlimited number of occurrences of the collection element in the document.

By default, this option is selected.

Sequence — The system assigns this read-only field. The sequence number is used for indexing with the PeopleCode API for documents.

Chapter 7

Managing XML- and Relational-Formatted Documents

This section provides an overview of managing XML- and relational-formatted documents and discusses how to:

- Manage XML-formatted documents.
- Manage relational-formatted documents.

Understanding Managing XML and Relational-Formatted Documents

After you have built the logical format of a document by adding elements and defining element properties, you can build the physical document. The physical document specifies the concrete details of a document, such as database tables, XML tag names, and so on.

Managing XML-Formatted Documents

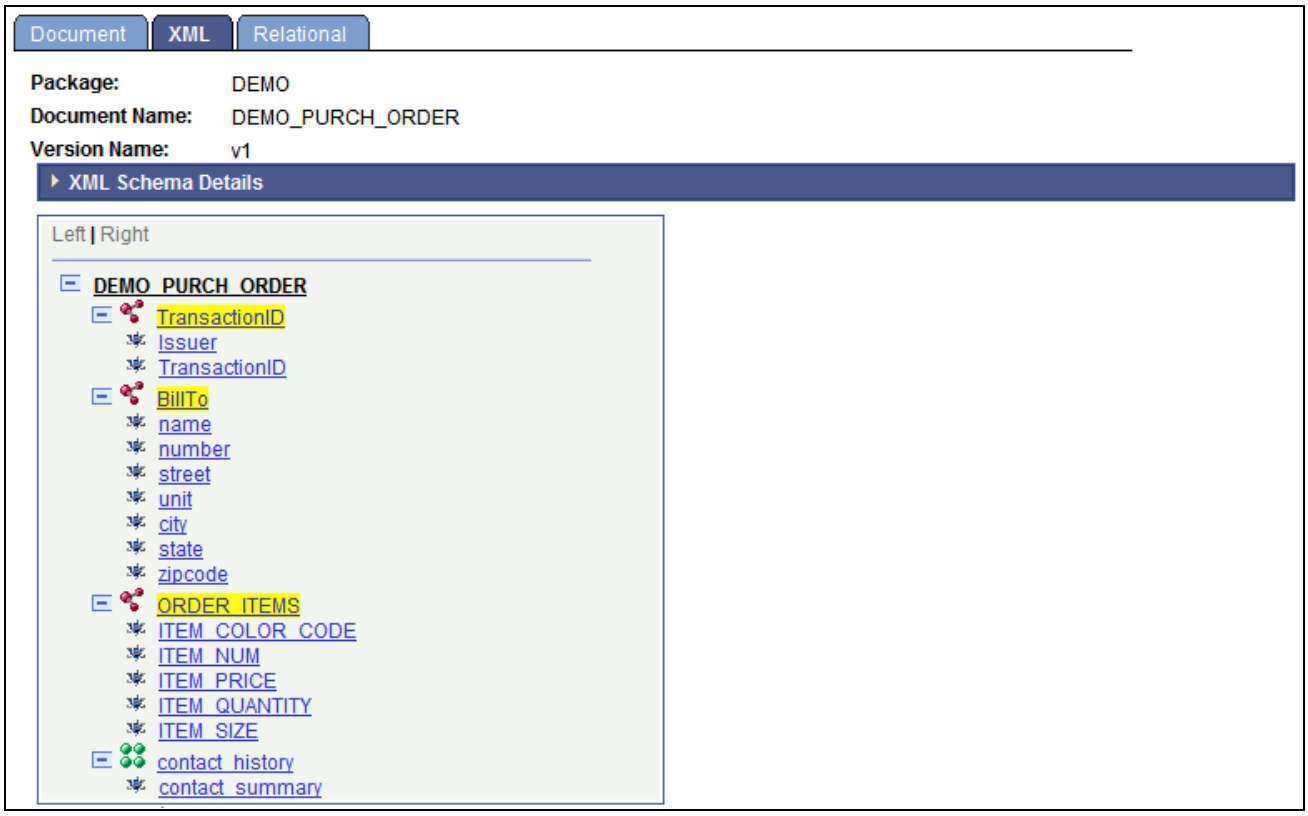
This section discusses how to:

- Define XML schema details.
- Define element details.
- Validate XML schemas.

Defining XML Schema Details

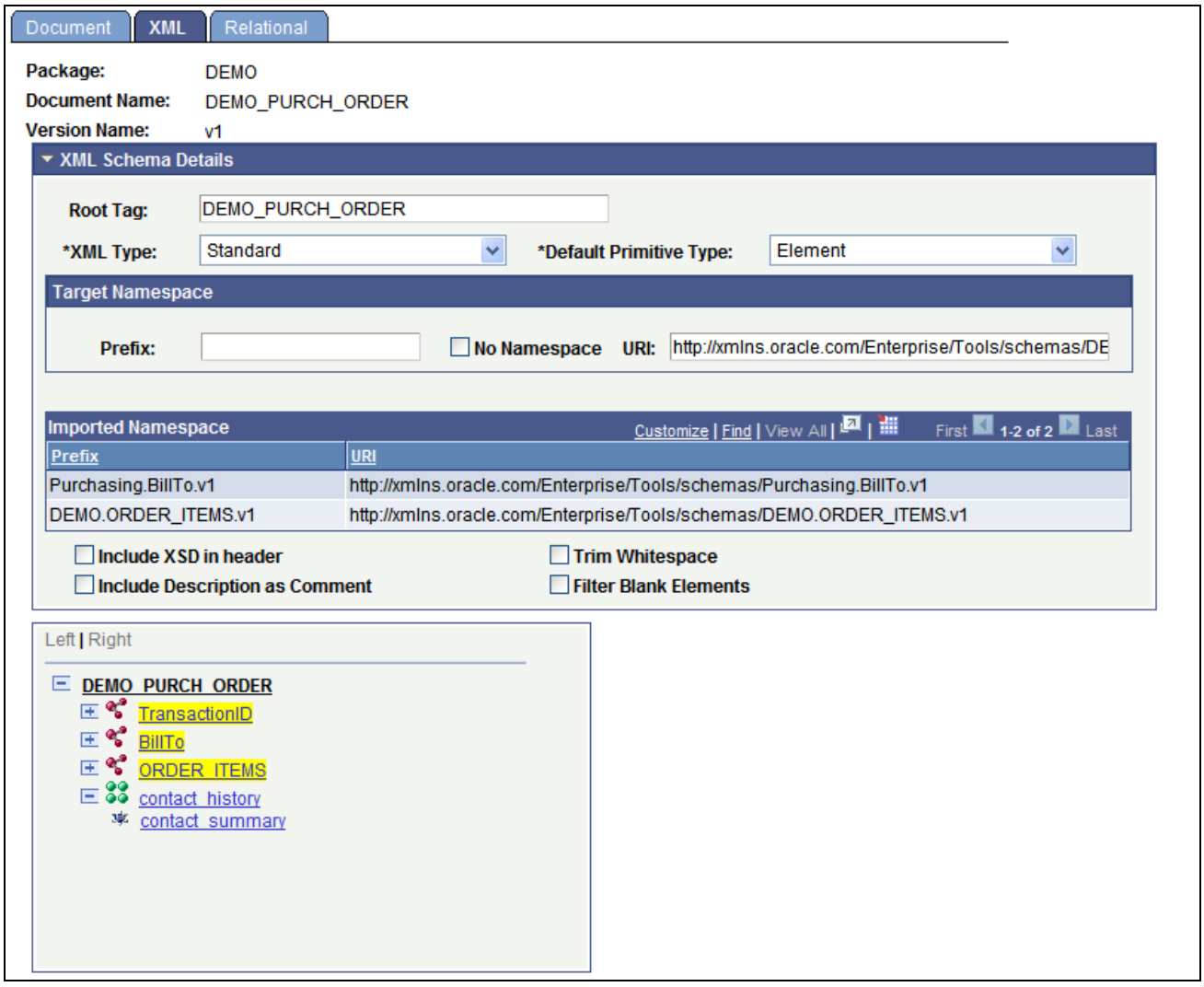
Use the Document Builder - XML page (IB_XMLSCHEMA) to define XML schema details for a document. This page enables you to define root tag names and namespace prefixes, include or exclude the schema reference in the generated XML, filter blank elements, and more.

To access the page, select PeopleTools, Documents, Document Builder and click the XML tab. The following example shows the Document Builder - XML page:



Document Builder - XML page.

When you initially open the Document Builder - XML page, the XML Schema Details section is collapsed. Click the arrow icon next to the XML Schema Details label to expand the section. The following example shows the XML Schema Details section expanded:



XML Schema Details section expanded on the Document Builder - XML page.

The following page elements appear in the XML Schema Details section:

Root Tag

(Optional) Enter the root tag as it is to appear in the XML document schema.

By default, the system populates the field with the only the first 30-characters of the document name. However, the full document name, up to the document name character limit of 100, appears in the generated XML document schema. The exception is if you modify the Root Tag field and overwrite the default with a new value; if you choose to do so, that value is used as the root tag element in generated schema.

If you overwrite the default value, the character limit is 30 characters.

See Chapter 5, "Searching For and Adding Documents," Understanding Naming Document Definitions and XML Root Tag Names, page 28.

XML Type	Select the XML type from the drop-down list. Currently, *Standard* is the only available XML type and is the default value.
Default Primitive Type	Select a value from the drop-down list. The options are: • *Element:* The primitive data types appear as elements in the XML schema. This value is the default. • *Element and CDATA Section:* The primitive data types appear within a CDATA section in the XML schema.
Prefix	(Optional) Enter a target namespace prefix.
No Namespace	(Optional) Select the check box to exclude the document target namespace from the XML schema. You can still use a prefix with this option enabled. Use this option when you want the document to be used as a child document. The document will use the target namespace of the parent. This option enables you to create libraries with schemas that are namespace transparent.
URI	Enter a target namespace. By default, the system uses the target namespace defined on the Integration Broker Service Configuration page.
Imported Namespace Section	This section displays the namespace prefix and URI of imported document namespaces. When you add a compound element that is a document data type to a document, the namespace prefix and URI are imported into the document definition.
Include XSD in header	(Optional) Select the check box to include the schema reference in the generated XML.
Trim Whitespace	(Optional) Select the check box to trim leading and trailing whitespace in the generated XML.
Include Description as Comment	(Optional) Select the check box to include descriptions in the generated XML schema.
Filter Blank Elements	(Optional) Select the check box to exclude blank elements in the generated XML. The IsChanged property must be false for primitive PeopleCode objects.

Defining Element Details

The Document Builder - XML page features an element details section where you can define element tag names, prefixes, and other details. To access the page, select PeopleTools, Documents, Document Builder and click the XML tab. The area you use to define element details appears under the XML Schema Details section.

To display the section, select an element. The details that you can define and manage appear on the right side of the page.

The following example shows the element details section that appears when the *contact_summary* element in the document tree of the DEMO_PURCH_ORDER document is selected. Note that the XML Schema Details section is collapsed:

Document Builder - XML page showing element details section.

The following page elements appear in the XML Schema Details section:

Element Name This read-only field displays the name of the selected element.

Tag Name (Optional) Enter the tag name to appear in the generated XML schema. By default, the system populates the field with the element name.

Prefix (Optional) Enter a prefix for the tag name.

XML Node Type From the drop-down list, select the XML node type for the element in the generated XML. The options are:

- *Attribute:* The element will appear as an element attribute in the generated XML.
- *Element:* The element will appear as an element node in the generated XML. This value is the default.
- *Element and CDATA Section:* The element will appear as an element within a CDATA section in the XML schema.

Trim Whitespace Select whether to trim the leading and trailing whitespace in the generated XML. The options are:

- *No Trim:* Leading and trailing whitespace is not trimmed in the generated XML. This value is the default.
- *Trim:* Leading and trailing whitespace is trimmed in the generated XML.

Validating XML Schemas

The Document Builder - XML page enables you to validate an XML schema for a document. To access the page, select PeopleTools, Documents, Document Builder and click the XML tab. To validate an XML schema for a document, click the Validate button at the bottom of the page. The system displays the validation results in a separate window.

Managing Relational-Formatted Documents

This section provides an overview of managing relational-formatted documents and discusses how to:

- Map PeopleSoft records to documents.
- Map document elements to PeopleSoft record fields.

Understanding Managing Relational-Formatted Documents

You can use the Document Builder to map PeopleSoft records and fields to documents. Doing so enables you to populate a rowset with a document.

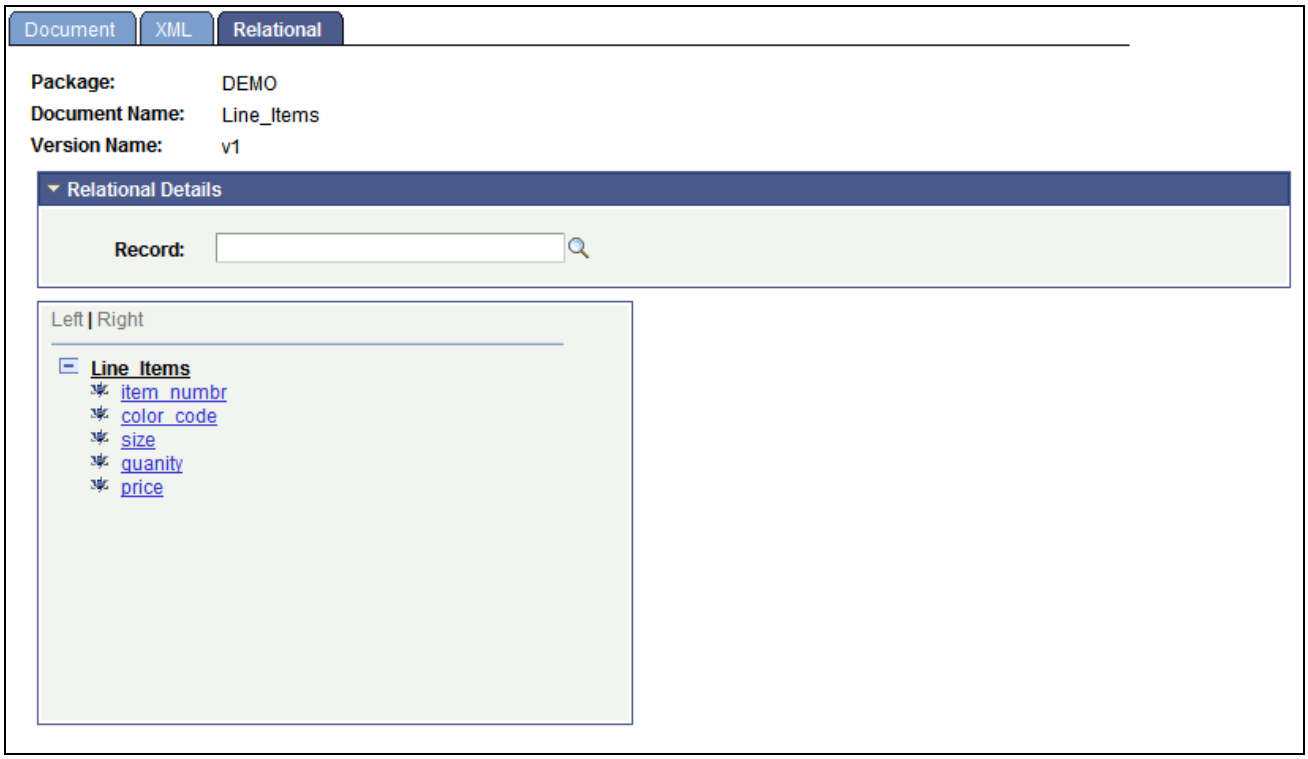
Mapping PeopleSoft Records to Documents

Use the Document Builder - Relational page (IB_RELATSCHEMA) to map a PeopleSoft record to a document. To access the page, select PeopleTools, Documents, Document Builder and click the Relational tab. The following example shows the page.

Document Builder - Relational page.

When you first access the page, the Relational Details section is collapsed. The Relational Details section is where you select the PeopleSoft record to map to the document. Click the arrow icon next to the Relational Details label to expand the section.

The following section shows the Relational Details section expanded.



Document Builder - Relational page showing the Relational Details section expanded.

To map a PeopleSoft record to a document:

1. Access the Document Builder - Relational page (PeopleTools, Documents, Document Builder and click the Relational tab).
2. Expand the Relational Details section.
3. In the Record field, enter the name of the PeopleSoft record to map to the document or use the Lookup button to select one.

Before you save the record, you should map the record fields to the document elements. If you attempt to save the definition before mapping the document elements to the fields in the record you specified, the system displays an error message. You can save the record without defining all of the field maps and return to the definition at a later time to specify the remaining maps. However, the document will fail validation until you define all maps.

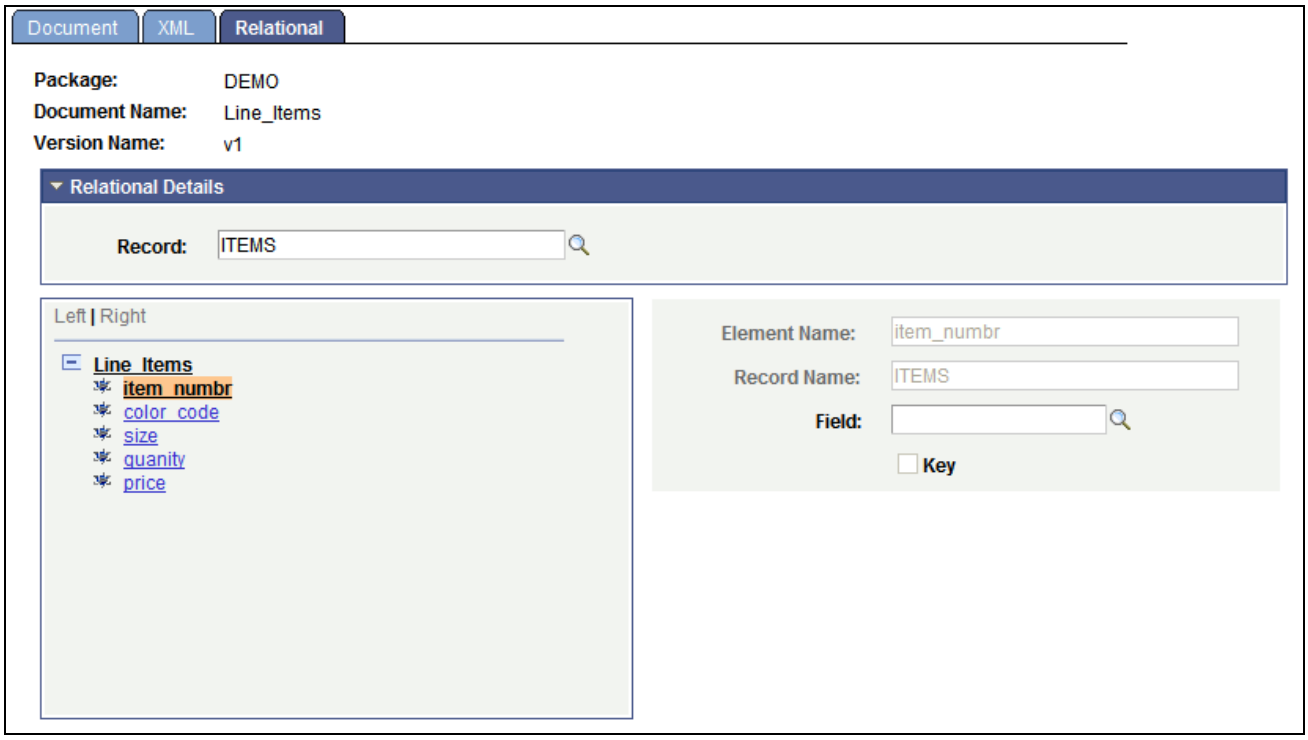
The procedure for mapping elements to record fields is described in the next section.

Mapping Document Elements to PeopleSoft Record Fields

After you map a PeopleSoft record to a document, you must map the document elements to the record fields.

After you map a record to a document, when you select an element in the document tree, a properties section displays to the right of the document tree, where you can map the element to a record field.

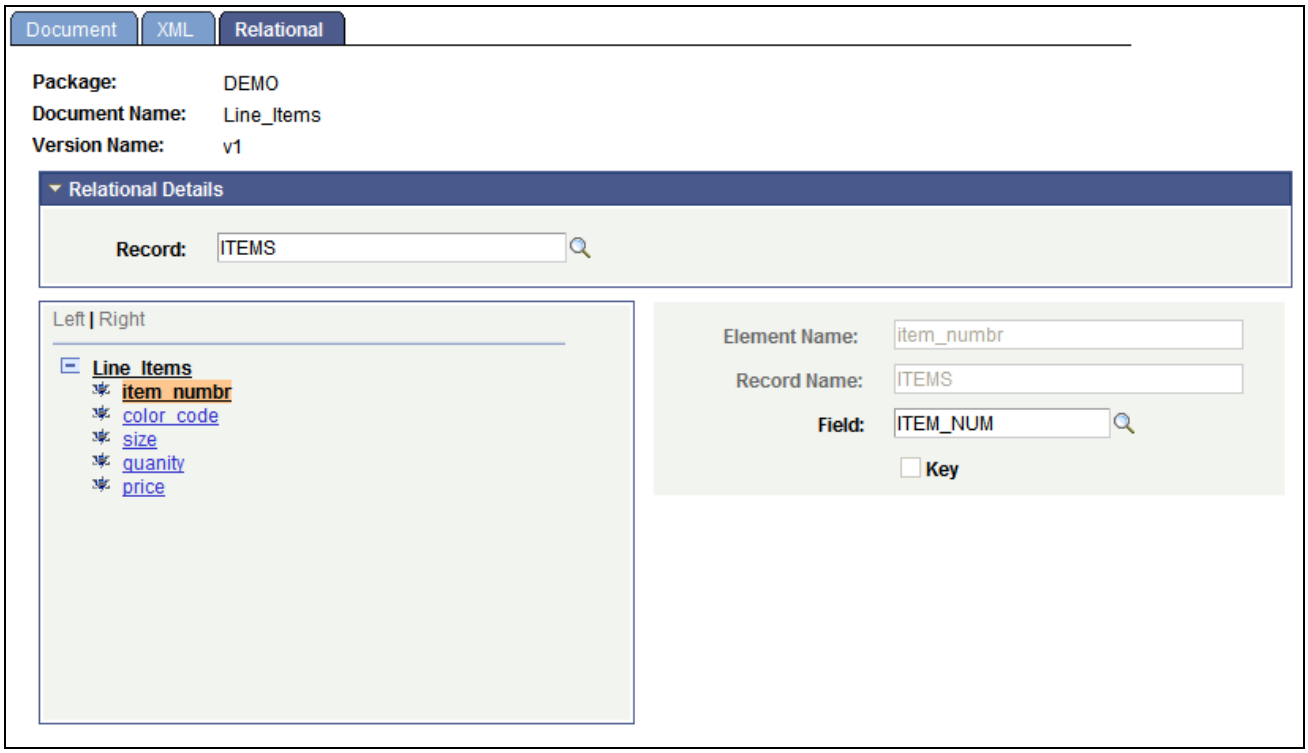
The following example shows a record called *ITEMS* that is mapped to the document *Line_Items*. In the document tree, the element *item_numbr* is selected, and the section to map a record field to the element appears on the right side of the page:



Mapping a field to the item_numbr element.

In the properties section, you can enter a field name or use the Lookup button to select from all fields in the record. You also have the option of specifying the field as a key field.

The following example shows that the record field *ITEM_NUM* has been selected to be mapped to the *item_numbr* element:



Mapping the record field ITEM_NUM to the item_numbr element.

To map document elements to PeopleSoft record fields

1. In the document tree, click the name of an element.

   The relational elements properties section appears on the right side of the page.
2. In the Field field, enter the name of the field to map to the element, or use the *Lookup* button to select one.
3. Select the Key check box if the field to define the field as a key field.
4. Repeat steps 1 through 3 to map each element in the document tree.
5. Click the Save button.

Chapter 8

Populating and Retrieving Document Data

This chapter provides an overview of populating and retrieving document data and shows examples of how to use PeopleCode to:

- Populate document data.
- Retrieve data from documents.

Understanding Populating and Retrieving Document Data

PeopleSoft provides a Document class that contains built-in functions and methods that enable you to populate and retrieve document data.

This chapter provides PeopleCode examples for your reference.

Note. The Document class is described in detail in the *PeopleTools PeopleBook: PeopleCode API Reference.*

The Document class provides PeopleCode for populating documents. It also provides PeopleCode for reading data from primitive, compound, and collection elements.

Document PeopleCode specific to Integration Broker messages is described in the *PeopleTools PeopleBook: Integration Broker*.

See Also

PeopleTools 8.51 PeopleBook: PeopleCode API Reference, "Document Classes"

PeopleTools 8.51 PeopleBook: PeopleSoft Integration Broker, "Sending and Receiving Messages"

Populating Document Data

The following pseudo code is an example of populating a document using the CreateDocumentKey built-in function.

This function enables you to pass a document key into the CreateDocument built-in function, which then gives you the document.

```
Local Document &DOC;
Local DocumentKey &DOCKEY;
Local Primitive &PRIM;

/* Populating Document Object */
&DOCKEY = CreateDocumentKey("Purchasing", "PurchaseOrder", "v1");
&DOC = CreateDocument(&DOCKEY);

&COM = &DOC.DocumentElement;

&COM.GetPropertyByName("Language_Code").Value = "ENG";

&COM_TRID = &COM.GetPropertyByName("TransactionId");
&COM_TRID.GetPropertyByName("issuer").Value = "PSFT";
&COM_TRID.GetPropertyByName("TransactionId").Value = "26435383";

&COM_BILLTO = &COM.GetPropertyByName("BillTo");
&COM_BILLTO.GetPropertyByName("name").Value = "Robby Naish";
&COM_BILLTO.GetPropertyByName("number").Value = "234";
&COM_BILLTO.GetPropertyByIndex(3).Value = "Alpine";
&COM_BILLTO.GetPropertyByIndex(4).Value = "4";
&COM_BILLTO.GetPropertyByName("city").Value = "Hood River";

&PRIM = &COM_BILLTO.GetPropertyByName("state");
&PRIM.Value = "Oregon";
&COM_BILLTO.GetPropertyByName("zipcode");
&PRIM.Value = "97031";

&COM_SHIPTO = &COM.GetPropertyByName("ShipTo");
&COM_SHIPTO.GetPropertyByName("name").Value = "Naish Sails";
&COM_SHIPTO.GetPropertyByName("number").Value = "123";
&COM_SHIPTO.GetPropertyByIndex(3).Value = "High Wind";
&COM_SHIPTO.GetPropertyByIndex(4).Value = "1";
&COM_SHIPTO.GetPropertyByName("city").Value = "Hood River";
&COM_SHIPTO.GetPropertyByName("state").Value = "Oregon";
&COM_SHIPTO.GetPropertyByName("zipcode").Value = "97031";

&COll_ITEMS = &COM.GetPropertyByName("item_collection");

&COM_ITEM = &COll_ITEMS.CreateItem();
&COM_ITEM.GetPropertyByName("items").Value = "4.2 Sail";
&COM_ITEM.GetPropertyByName("sku").Value = "s12322";
&COM_ITEM.GetPropertyByName("price").Value = "450";
&COM_ITEM.GetPropertyByName("quantity").Value = "2";
&nRet = &COll_ITEMS.AppendItem(&COM_ITEM);

&COM_ITEM = &COll_ITEMS.CreateItem();
&COM_ITEM.GetPropertyByIndex(1).Value = "Mast";
&COM_ITEM.GetPropertyByName(2).Value = "m485765";
&COM_ITEM.GetPropertyByName(3).Value = "550";
&COM_ITEM.GetPropertyByName(4).Value = "3";
&nRet = &COll_ITEMS.AppendItem(&COM_ITEM);

&COM_ITEM = &COll_ITEMS.CreateItem();
&COM_ITEM.GetPropertyByName("items").Value = "Boom";
&COM_ITEM.GetPropertyByName("sku").Value = "b9754";
&COM_ITEM.GetPropertyByName("price").Value = "375";
&COM_ITEM.GetPropertyByName("quantity").Value = "2";
&nRet = &COll_ITEMS.AppendItem(&COM_ITEM);
```

Retrieving Document Data

The following pseudo code is an example of retrieving data out of a compound element using the GetPropertyByName and GetPropertyByIndex methods:

```
&COM = &DOC.DocumentElement;

&LNG_Code = &COM.GetPropertyByName("Language_Code").Value;

&COM_TRID = &COM.GetPropertyByName("TransactionId");
&data = &COM_TRID.GetPropertyByName("issuer").Value;
&data = &COM_TRID.GetPropertyByName("TransactionId").Value;

&COM_BILLTO = &COM.GetPropertyByName("BillTo");
&data = &COM_BILLTO.GetPropertyByName("name").Value;
&data = &COM_BILLTO.GetPropertyByName("number").Value;
&data = &COM_BILLTO.GetPropertyByIndex(3).Value;
&data = &COM_BILLTO.GetPropertyByIndex(4).Value;
&data = &COM_BILLTO.GetPropertyByName("city").Value;
&data = &COM_BILLTO.GetPropertyByName("state").Value;
&data = &COM_BILLTO.GetPropertyByName("zipcode").Value;

&COM_SHIPTO = &COM.GetPropertyByName("ShipTo");
&PRIM = &COM_SHIPTO.GetPropertyByName("name");
&data = &PRIM.Value;
&data = &COM_SHIPTO.GetPropertyByName("number");
&data = &PRIM.Value;
&data = &COM_SHIPTO.GetPropertyByIndex(3).Value;
&data = &COM_SHIPTO.GetPropertyByIndex(4).Value;
&data = &COM_SHIPTO.GetPropertyByName("city").Value;
&data = &COM_SHIPTO.GetPropertyByName("state").Value;
&data = &COM_SHIPTO.GetPropertyByName("zipcode").Value;

&COll_ITEMS = &COM.GetPropertyByName("item_collection");

For &i = 1 To &COll_ITEMS.GetCount

   &COM_ITEM = &COll_ITEMS.GetItem(&i);
   &data = &COM_ITEM.GetPropertyByName("items").Value;
   &data = &COM_ITEM.GetPropertyByName("sku").Value;
   &data = &COM_ITEM.GetPropertyByName("price").Value;
   &data = &COM_ITEM.GetPropertyByName("quantity").Value;

End-For;
```

Chapter 9

Creating Documents from Schema

This chapter discusses how to:

- Access the Create Document from the Schema utility.
- Read schema.
- Build the document from schema.
- View the document created from schema in the Document Builder.

Understanding Creating Documents from Schema

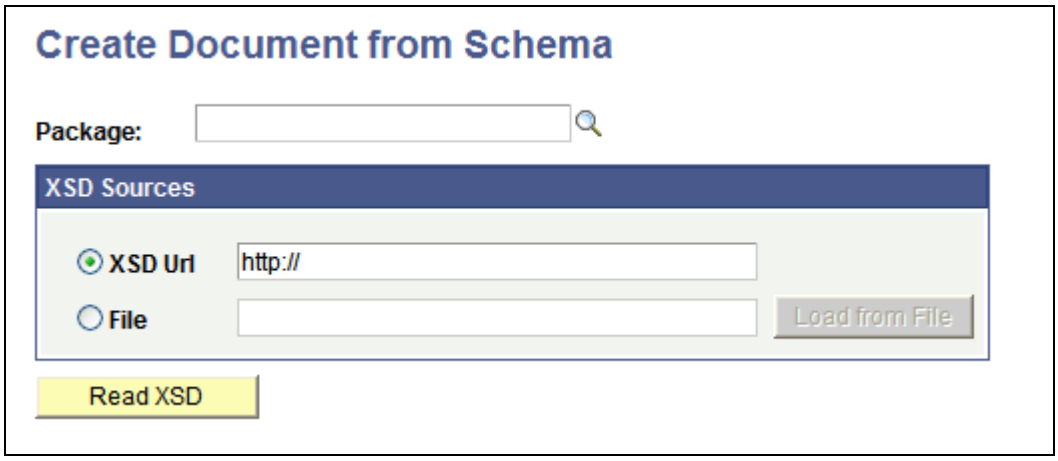
PeopleSoft provides a Create Document from Schema utility that enables you to create a document based on an XML schema that you import using an XSD URL or from a file.

When you create a document from schema, you can create the document in an existing package or specify a new package.

Accessing the Create Document from the Schema Utility

The Create Document from Schema utility page (IB_DOCUMENT_CRSCHM) is located in the IB_DOCUMENT_CRSCHM component.

To access the Create Document from Schema Utility, select PeopleTools, Documents, Document Utilities, Create Document from Schema. The following example shows the Create Document from Schema page:



Create Document from Schema page.

Reading Schemas

To read a schema:

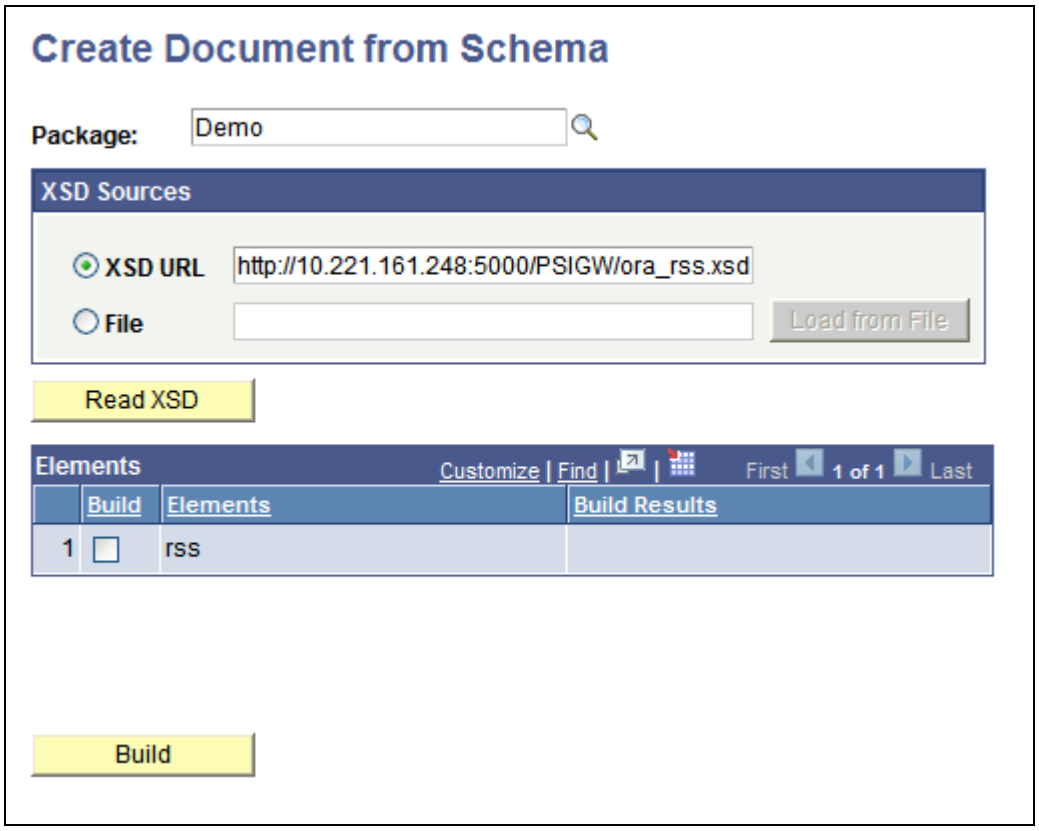
1. Access the Create Document from Schema page (PeopleTools, Documents, Document Utilities, Create Document from Schema).
2. In the Package field, specify a package for the document you are creating using one of the following methods:
   - Enter a new package name.
   - Enter an existing package name or use the Lookup button to select one.
3. Select the source of the schema using one of the following methods:
   - In the XSD URL field, enter a schema URL.
   - In the File field, enter the schema file name or click the Load from File button to browse to and select the file.
4. Click the Read XSD button.

An Element section appears at the bottom of the page. The next step is to build the document, as discussed in the next section.

Building Documents from Schema

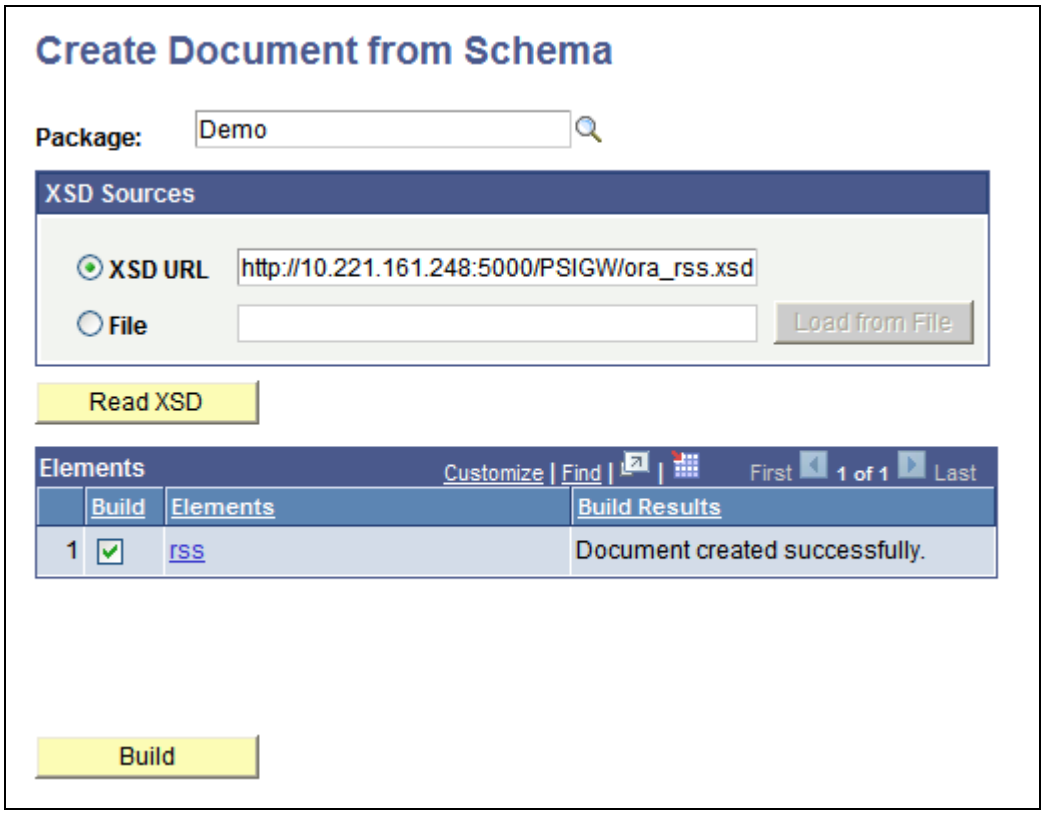
After you specify a package and have read a schema into the system, you select the elements to include in the document and build the document.

The following example shows the Create Document from Schema page after you have read the schema:



Create Document from Schema page after schema is read by the system.

After you have read the schema, an Elements section appears at the bottom of the page. Here, you select the elements to build out in the document. The following example shows the Create Document from Schema page after you have selected the elements to include in the document:



Create Document from Schema page after selecting elements to include in the document.

To build a document from schema:

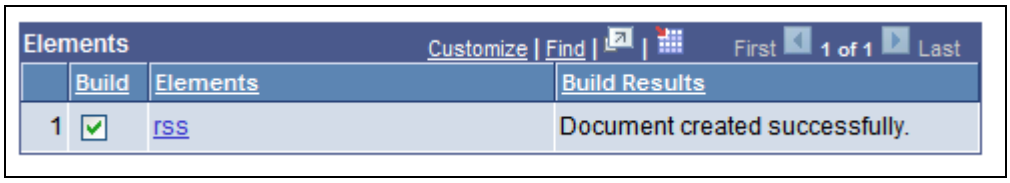
1. In the Elements section, select the Build check box for each element to include in the document.
2. Click the Build button.

The Build Results column in the Elements section displays the status of the action. The next section discusses how to view and manage the new document.

Viewing Documents Created from Schema in the Document Builder

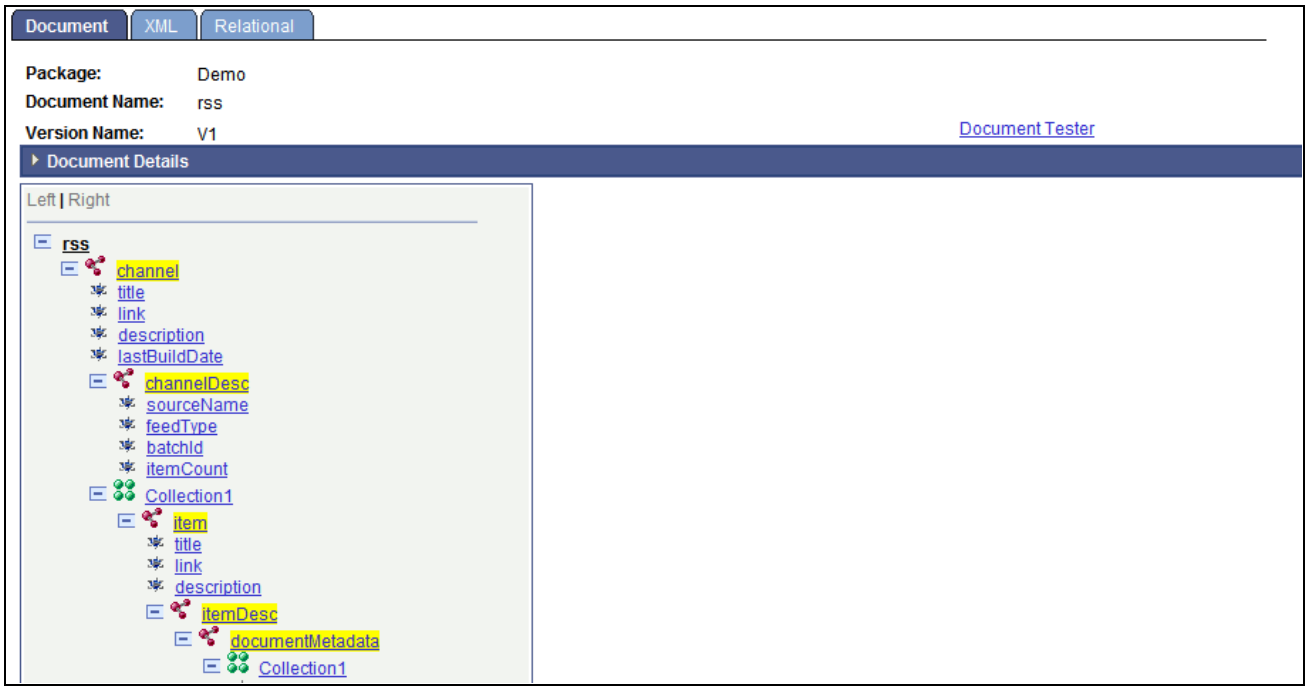
After you create a document using the Create Document from Schema utility, you can access the document in the Document Builder from the utility.

After you successfully build a document, click the hyperlinked element name in the Elements section to open the document in the Document Builder. The following example shows the Elements section with the *rss* element selected:



Click the rss link to open the document in the Document Builder.

When you click the link, the document opens in the Document Builder, and you can view and manage the document like any other document in the system. The following example shows a partial view of the *rss* document in the Document Builder:



Document page showing a partial view of the rss document created from schema.

Chapter 10

Copying and Exporting Documents

This chapter provides an overview of copying and exporting documents and discusses how to:

- Copy documents.
- Export documents.
- Copy documents between databases.

Understanding Copying and Exporting Documents

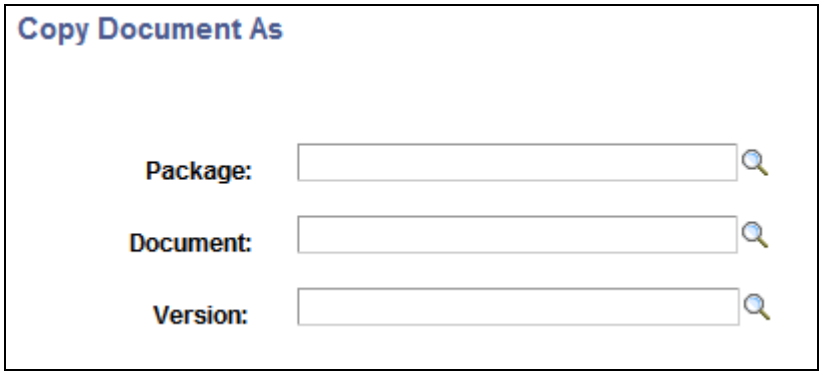
The Document Builder enables you to make a copy of an existing document, as well as export document schema to a file.

However, if a document is read-only, you cannot copy or export it. The conditions under which a document is read-only are described elsewhere in this PeopleBook.

See Chapter 12, "Securing Documents," Managing Write-Access to Documents, page 91.

Copying Documents

Use the Documents Builder copy feature to copy and save a document using a different name. When you click the Copy button from the Documents Builder - Document tab, the following Copy Document As page (IB_LOGICALCOPY) appears:



Use the Copy Document As page to make a copy of a document.

When you copy a document, one of the following parameters you use for the new document must be different than the original: Package, Document, or Version.

To copy a document:

1. Access the Document Builder (PeopleTools, Documents, Document Builder).
2. Locate and open the document definition to copy.

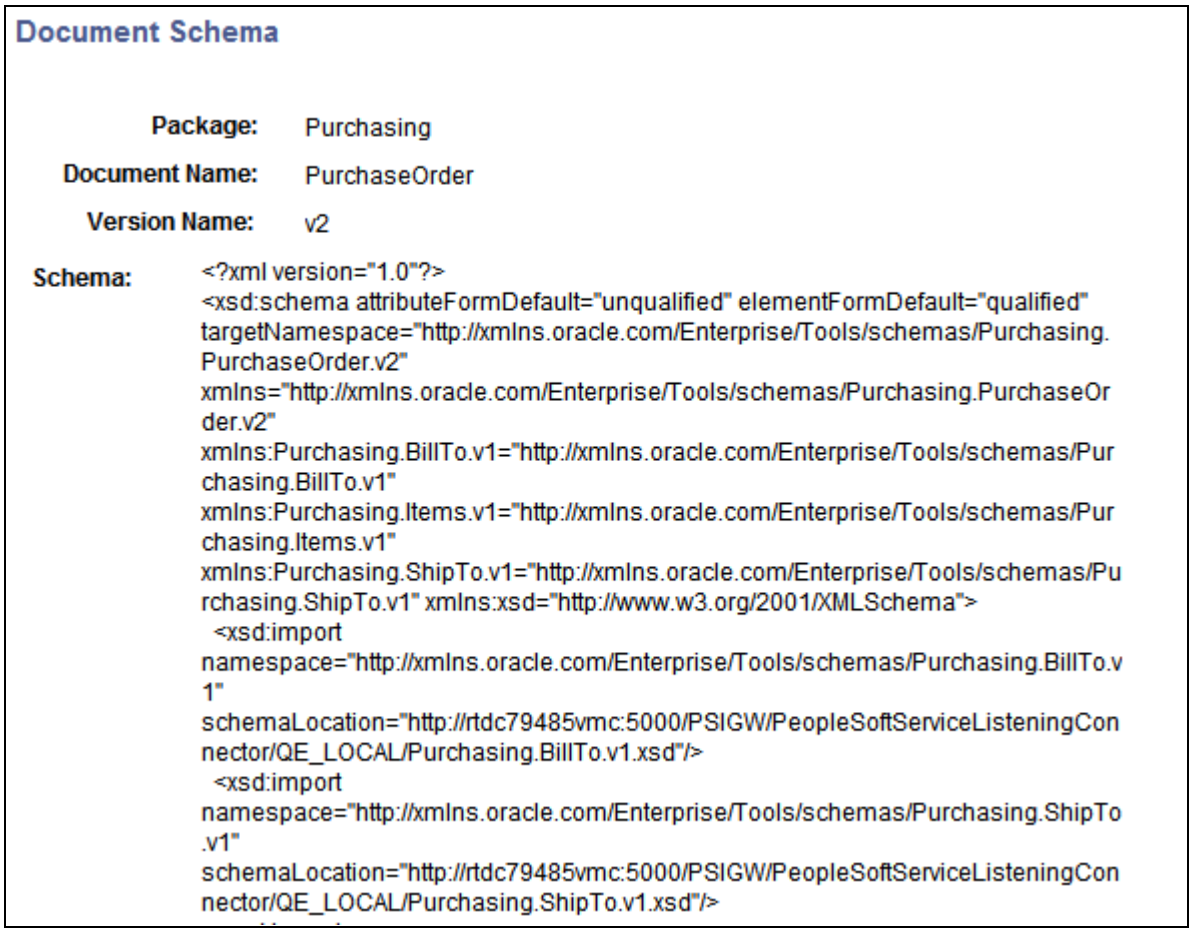
   The document appears in the Document Builder.
3. At the bottom of the Document Builder page, click the Copy button.

   The Copy Document As page appears.
4. In the Package field, enter the package name or click the Lookup button to search for one.
5. In the Document field, enter the document name or click the Lookup button to search for one.
6. In the Version field, enter the version number or click the Lookup button to search for one.
7. Click the OK button.

   The new copied version of the document appears in the Document Builder.

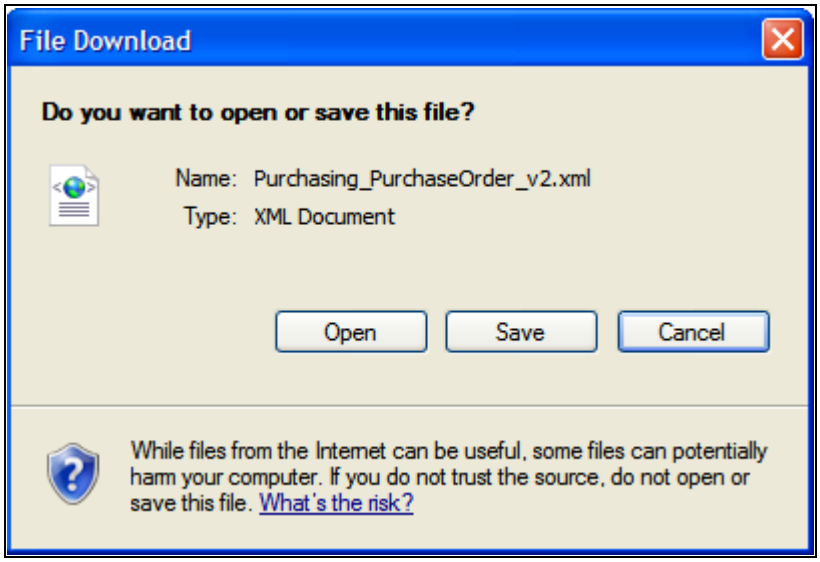
Exporting Documents

The Document Builder provides a Document Schema page (IB_LOGICALSCMA_SEC) that enables you to export an XML document schema to a file. To access the page, click the Export button at the bottom of the Document Builder - Documents page. The following example shows the Document Schema page:



A partial view of an XML document schema appearing in the Document Schema page.

A Save As button appears at the bottom of the Document Schema page. When you click the button, a File Download dialog box, similar to the one shown in the following example, appears:



The File Download dialog box used to export a document schema from the Document Builder.

You can save the schema to a file or open it in an XML editor.

The XML schema of the document saved in the database is the schema that the system exports; therefore, you must save any updates to the document so that they are reflected in the exported XML schema.

The export feature exports the entire document definition.

To export a document:

1. Access the Document Builder (PeopleTools, Documents, Document Builder).
2. Locate and open the document to export.

   The document appears in the Document Builder.
3. At the bottom of the Document Builder page, click the Export button.

   The Document Schema page appears.
4. At the bottom of the Document Schema page, click the Save As button.

   A File Download dialog box appears.
5. Perform one of the following actions:

   - Click the Save button to save the schema to file.
   - Click the Open button to open the schema in an XML editor of your choice.
6. Close the File Download dialog box.
7. On the Document Schema page, click the Return button to go back to the Document Builder - Document page.

Copying Documents Between Databases

This section discusses how to:

- Copy documents between PeopleTools 8.51 databases.
- Copy documents between PeopleTools 8.51 databases and later releases.

Copying Documents Between PeopleTools 8.51 Databases

You can use PeopleSoft Application Designer's Project Copy functionality to copy document metadata between PeopleTools 8.52 databases.

See Also

PeopleTools 8.51 PeopleBook: PeopleSoft Application Designer Developer's Guide, "Working With Projects"

Copying Documents Between PeopleTools 8.51 Databases and Later Releases

If you copy a document schema from a later release to a PeopleTools 8.51 database, schema validation may fail. Delete the schema before you copy the document to the PeopleTools 8.51 database; the system automatically rebuilds document schema when you save the document or deploy it.

There are no restrictions for copying documents and associated document schema from a PeopleTools 8.51 database to a later release

See Also

PeopleTools 8.51 PeopleBook: PeopleSoft Application Designer Developer's Guide, "Working With Projects"

Chapter 11

Renaming and Deleting Documents

This chapter provides an overview of renaming and deleting documents and discusses how to:

- Rename documents.
- Delete documents.

Understanding Renaming and Deleting Documents

If a document is read-only, you cannot rename or delete it. The conditions under which a document is read-only are described elsewhere in this PeopleBook.

See Chapter 12, "Securing Documents," Managing Write-Access to Documents, page 91.

Renaming Documents

This section provides an overview of renaming documents and discusses how to:

- Rename documents in the Document Builder.
- Rename documents in the Document Administration component.

Understanding Renaming Documents

You can rename a document in two locations in the PeopleSoft system:

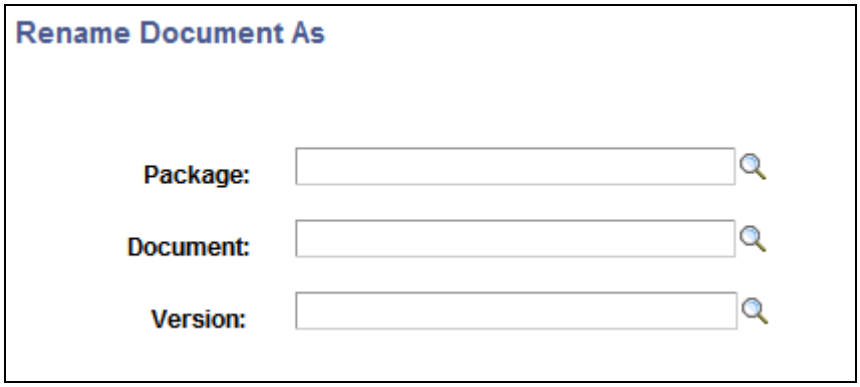
- Document Builder.
- Document Administration component.

This section describes how to rename documents in both locations.

When you rename a document, at least one of the following parameters must be different than the original: Package, Document, or Version.

Renaming Documents in the Document Builder

You can rename a document in the Document Builder, using the Rename Document As page (IB_LOGICALCOPY). To access the page, select PeopleTools, Documents, Document Builder and click the Rename button. The following example shows the Rename Document As page:



The Rename Document As page in the Document Builder.

To rename a document in the Document Builder:

1. Access the Rename Document As page (PeopleTools, Documents, Document Builder and click the Rename button).

   The Rename Document As page appears.

2. Rename the document by selecting values for the following fields. Keep in mind that at least one of the fields must be changed to a value different than the original document name:

   a. In the Package field, enter a package name or click the Lookup button to search for one.

   b. In the Document field, enter a document name or click the Lookup button to search for one.

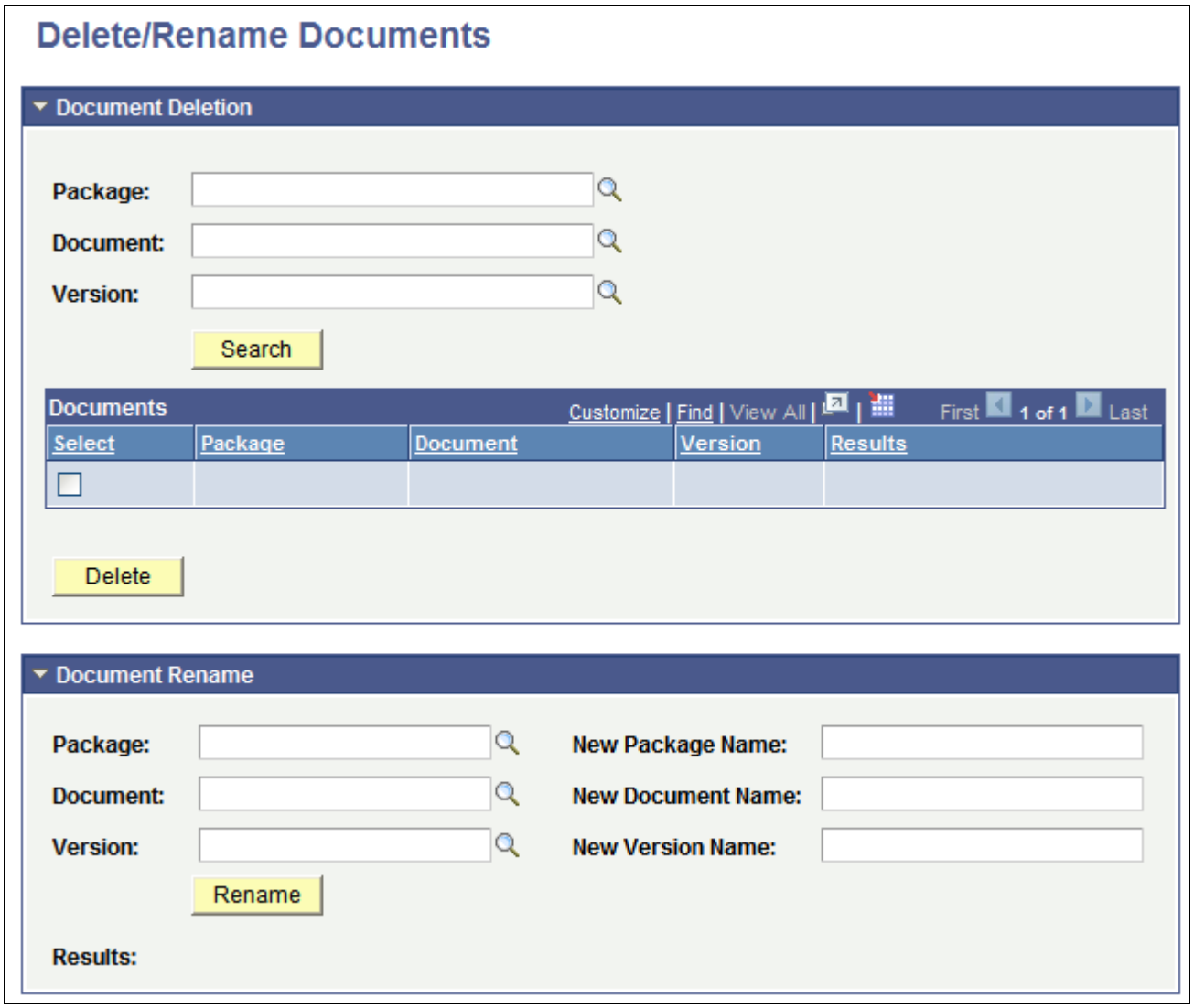
   c. In the Version field, enter a version number or click the Lookup button to search for one.

3. Click the OK button.

   The renamed version of the document appears in the Document Builder - Document page.

Renaming Documents in the Document Administration Component

You can also rename a document in the PeopleSoft system using the Delete/Rename Document page (IB_DOCUMENT_ADMIN) located in the Document Administration component. To access the page, select PeopleTools, Documents, Document Administration, Delete/Rename Document. The following example shows the Delete/Rename Documents page:



Delete/Rename Documents page.

Use the Document Rename section at the bottom of the page to rename a document.

To rename a document in the Document Administration component:

1. Access the Delete/Rename Document page (PeopleTools, Documents, Document Administration, Delete/Rename Document).

   The Delete/Rename Document page appears.

2. At the bottom of the page, click the arrow icon next to Document Rename to expand the section if it is not already expanded.

3. On the left side of the section, enter the details of the existing document to rename:

   a. In the Package field, enter the package name or click the Lookup button to search for one.

   b. In the Document field, enter the document name or click the Lookup button to search for one.

   c. In the Version field, enter the version number or click the Lookup button to search for one.

4. On the right side of the section, enter the new naming details of the document. Keep in mind that at least one of the values you enter must be different than the original name:

    a. In the New Package Name field, enter a package name.

    b. In the New Document Name field, enter a document name.

    c. In the New Version Name field, enter a version number.

5. Click the Rename button.

    The Results field at the bottom of the page indicates if the action was successful.

Deleting Documents

This section provides an overview of deleting documents and discusses how to:

- Delete documents in the Document Builder.
- Delete documents in the Document Administration Component.

Understanding Deleting Documents

You can delete documents from two locations in the PeopleSoft system: in the Document Builder and on the Delete/Rename Documents page of the Document Administration component.

You can use either location to delete a single document from the system. To delete multiple documents at a time, use the Delete/Rename Documents page.

Note that when you delete a document, you delete the document and all related objects.

Deleting Documents in the Document Builder

To delete a document in the Document Builder:

1. Access the Document Builder - Document page (PeopleTools, Documents, Document Builder).
2. Click the Delete button.
3. Click the OK button.

Deleting Documents in the Document Administration Component

You can also delete a document in the PeopleSoft system using the Delete/Rename Document page (IB_DOCUMENT_ADMIN) located in the Document Administration component. Using the Delete/Rename page, you can delete a single document or multiple documents.

To delete a document in the Document Administration component:

1. Access the Delete/Rename Document page (PeopleTools, Documents, Document Administration, Delete/Rename Document).

   The Delete/Rename Document page appears.

2. Click the arrow icon next to the Document Deletion label to expand the section if it is not already expanded.

3. Search for the documents to delete.

   See Chapter 5, "Searching For and Adding Documents," Searching for Document Definitions, page 27.

4. In the Documents section, select the Select check box next to each document that you want to delete.

5. Click the Delete button.

Chapter 12

Securing Documents

This chapter provides an overview of securing documents and discusses how to:

- Specify private documents.
- Manage write-access to documents.

Understanding Securing Documents

PeopleSoft provides several options for securing documents at the definition level.

Note. Along with exploring the options described in this chapter, a security analyst should assess your overall security requirements.

You can specify that documents be used only in the document package to which they are defined. In doing so, the document is not an option for documents belonging to other packages to reference. In addition, you can restrict write-access to documents, making them read-only.

Specifying Private Documents

When you specify a document as private, the document can only be used in its own document package and can only be referenced by other documents in the same package.

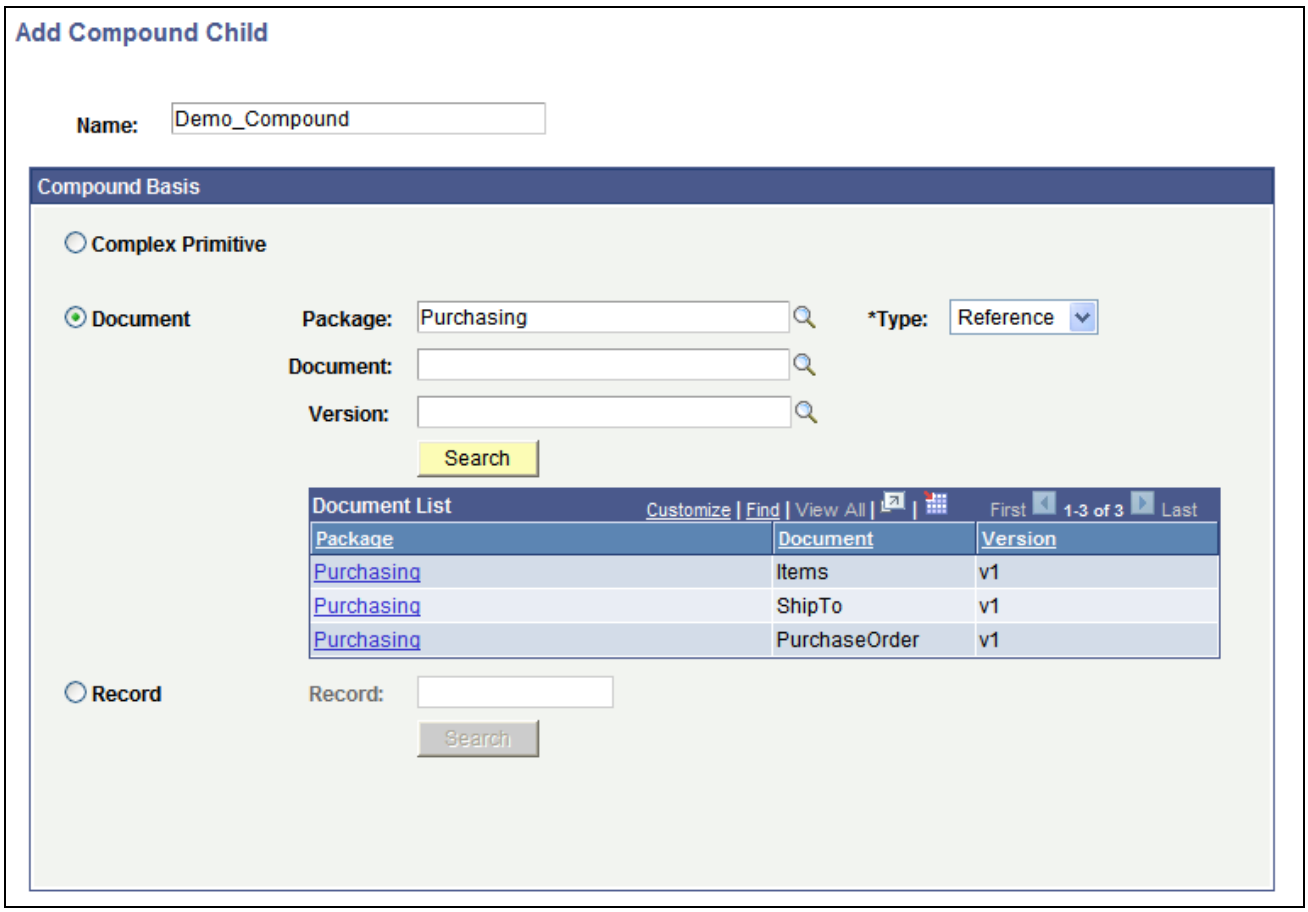
You specify a document as private by selecting the Is Private check box in the Document Details section of the document definition.

The following example shows the Document Details section of the *BillTo*document:

Is Private check box selected for the BillTo document.

When you mark a document private, the document does not appear as a reference option when attempting to specify it in a document that belongs to any other document package than its own.

The following example shows the Add Compound Child page for the document *Demo_Document* that belongs to the *Demo* package:



The BillTo document doesn't appear as an option.

The previous example shows that the when searching for a document in the Purchasing package to reference, the BillTo document does not appear as an option, since it is designated a private document.

To specify a private document:

- Select PeopleTools, Documents, Document Builder.

- Click the arrow icon next to the Document Details label to expand the section.
- Select the Is Private check box.
- Click Save.

Managing Write-Access to Documents

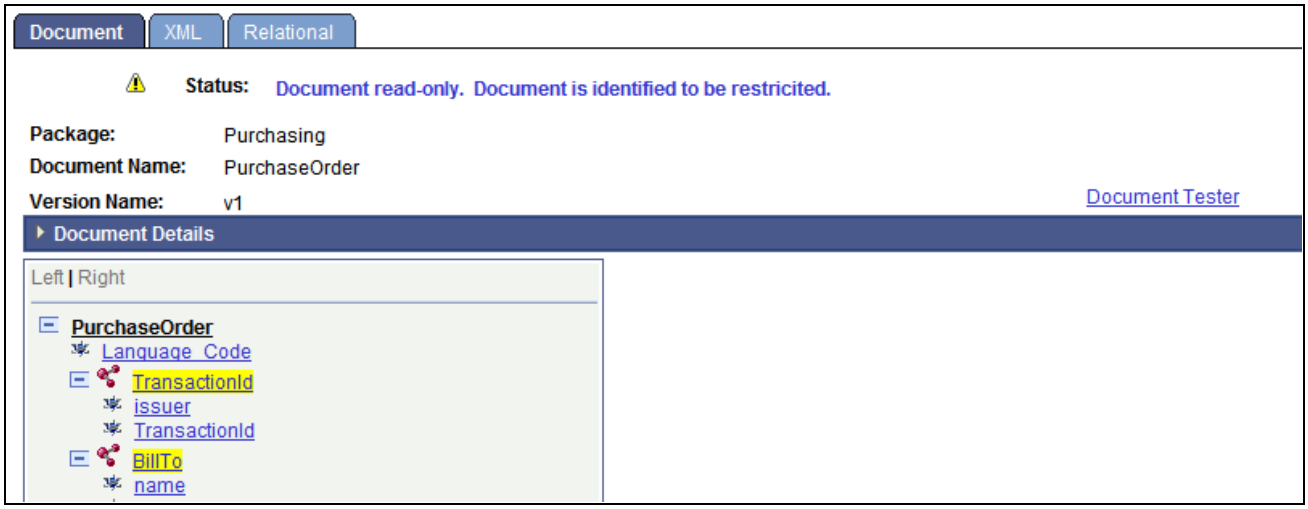
This section discusses how to:

- Restrict write-access to documents.
- Clear restricted write-access to documents.

Restricting Write-Access to Documents

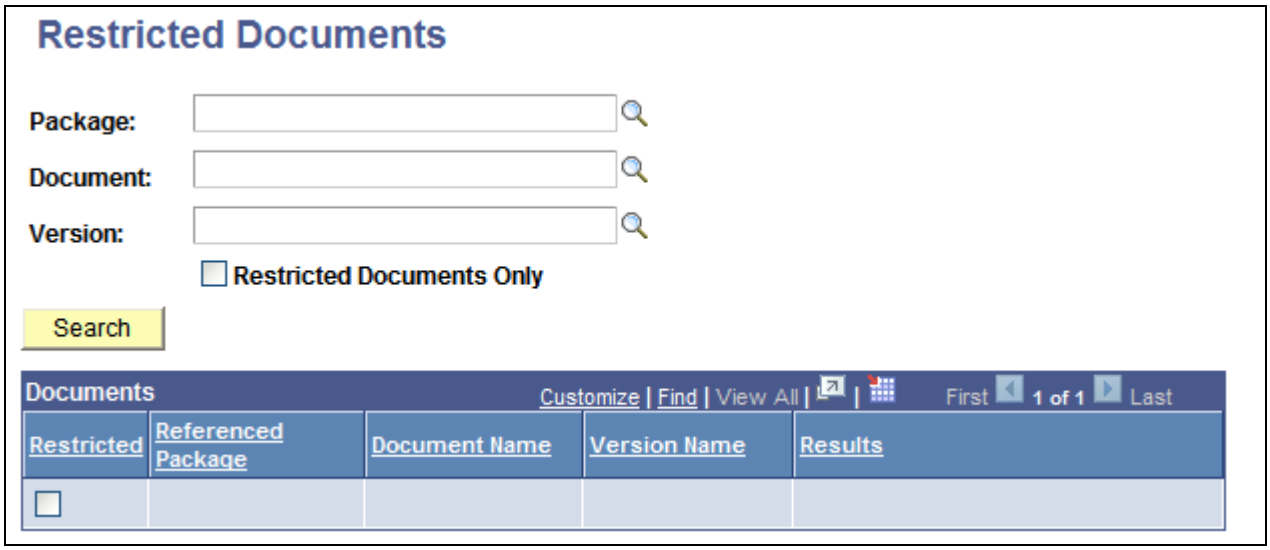
When you restrict write-access to a document, it becomes read-only.

When someone accesses a document that is read-only, a status message appears at the top of the document definition that indicates it is a restricted document and is read-only. The following example shows a document with restricted write-access:



the status message at the top of the page of the PurchaseOrder document definition indicates it is a restricted document.

Use the Restricted Documents page (IB_DOCUMENT_RSTRT) to restrict write-access to documents. To access the page, select PeopleTools, Documents, Document Administration, Restricted Documents. The following example shows the Restricted Documents page:



Use the Restricted Documents page to restrict write-access to documents.

To restrict write-access to documents:

1. Access the Restricted Documents page (PeopleTools, Documents, Document Administration, Restrict Documents).
2. Search for the document or documents for which to restrict write-access.

   See Chapter 5, "Searching For and Adding Documents," Searching for Document Definitions, page 27.

   The search results appear in the Documents grid at the bottom of the page.
3. Select the Restricted check box next to each document for which to restrict write-access.
4. At the bottom of the page, click the Update button.

   In the Results column next to each selected document, the message *Document restricted* appears.

Clearing Restricted Write-Access to Documents

To clear restricted write-access to documents, use the Restricted Documents page (IB_DOCUMENT_RSTRT) shown in the previous section.

To clear restricted write-access to documents:

1. Access the Restricted Documents page (PeopleTools, Documents, Document Administration, Restrict Documents).
2. Search for the document or documents for which to clear restricted access.

   a. To search for a specific document, enter one or more values in the following fields: Package, Document,Version.

   b. To display all restricted documents in the system, select the Restricted Documents Only check box.

3. Click the Search button.

   The search results appear in the Documents grid.

   Observe that the Restricted check box is selected next to all documents with restricted access.

4. Clear the Restricted check box next to each document for which to clear restricted write-access.

5. At the bottom of the page, click the Update button.

   In the Results column, the message *Document unrestricted* appears next to each document for which you cleared restricted access.

Chapter 13

Testing Document Schema

This chapter provides an overview of the testing document schema, lists prerequisites, and discusses how to:

- Access the Document Schema Tester utility.
- Test XML document schema.

Understanding Testing Document Schema

PeopleSoft provides a Document Schema Tester utility that enables you to test and validate XML document schema generated by the Document Builder.

The Document Schema Tester utility enables you to validate XML documents against document schemas during development to determine if documents adhere to defined document schemas.

Prerequisites for Testing Document Schema

To use the Document Schema Tester utility and test document schema, the following items must exist:

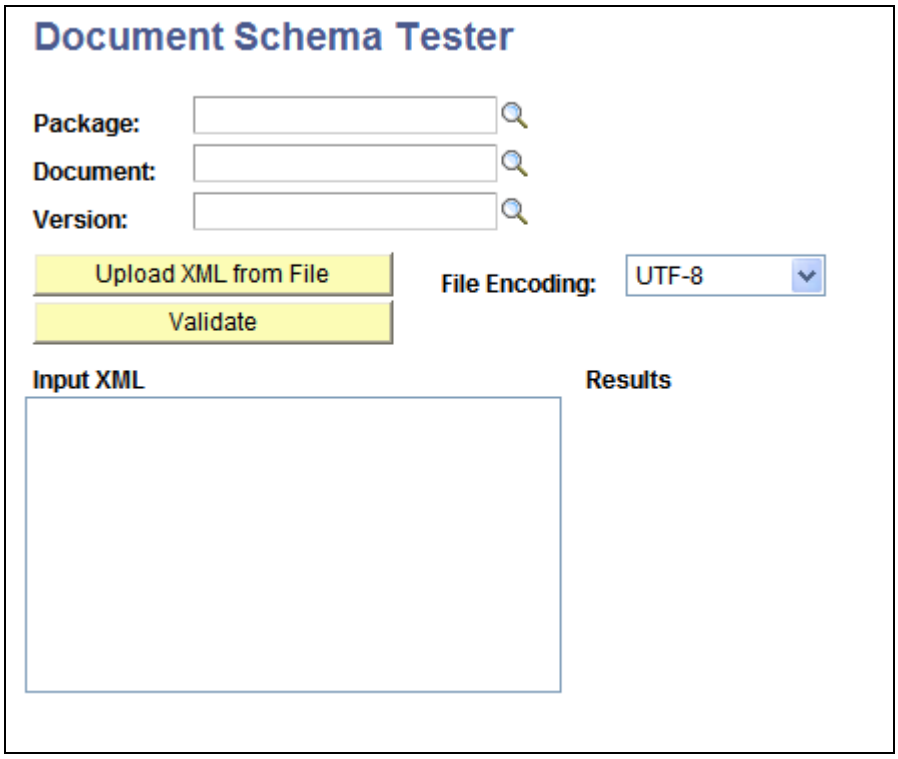
- A document schema against which to test a document.
- An XML document to test against a schema.

Access the Document Schema Tester Utility

The Document Schema Tester utility is located in the Document Schema Tester component (IB_DOCSCHEMATESTER).

To access the Document Schema Tester page (IB_DOCSCHEMATESTER), select PeopleTools, Documents, Document Utilities, Document Schema Tester.

The following example shows the Document Schema Tester page:



Document Schema Tester page.

Testing XML Document Schema

To test XML document schema:

1. Access the Document Schema Tester page (PeopleTools, Documents, Document Utilities, Document Schema Tester).
2. Select the document against which to test the schema:
   a. In the Package field, enter the name of the package to which the document belongs or click the Lookup button to search for the name.
   b. In the Document field, enter the name of the document or click the Lookup button to search for the name.
   c. In the Version field, enter the document version or click the Lookup button to search for the version.
3. From the File Encoding drop-down list box, select the file encoding of the XML schema you are loading. The options are:
   - *Non-Unicode.*
   - *UTF-8.* (Default.)
   - *UTF-16.*

4. Load the XML document schema to test against the document. Use one of the following options:
    - To load an XML document schema from file, click the Load XML from File button. The File Attachment dialog box appears. Click the Browse button to locate the XML document schema to upload and click the Upload button.
    - To load an XML document schema manually, enter the XML schema in the XML Input field.
5. Click the Validate button.

The results of the test appear in the Results area of the page.

Chapter 14

Testing Documents

This chapter provides an overview of document testing and discusses how to:

- Access the Document Tester utility.
- Enter element test values.
- Generate and view test documents.
- Clear Document Tester utility data.

Understanding Testing Documents

PeopleSoft provides a Document Tester utility that enables you to test the physical format of documents outside of runtime.

The utility provides you the option of entering sample data values for primitive elements, as well as appending or deleting rows in collection elements. You can clear test values and actions at anytime, and assign new test values and actions and regenerate the test document.

Note. You can generate test documents with or without entering test data values or performing append and delete actions.

You can then generate the physical document, and the system verifies if the format is valid and if it can be parsed. In addition, the system displays the generated document for you to view.

Note. Currently, XML is the only physical format generated by the PeopleSoft system.

The Document Tester also provides a link to the Document Builder, should you need to make changes to a document as a result of testing it.

Accessing the Document Tester Utility

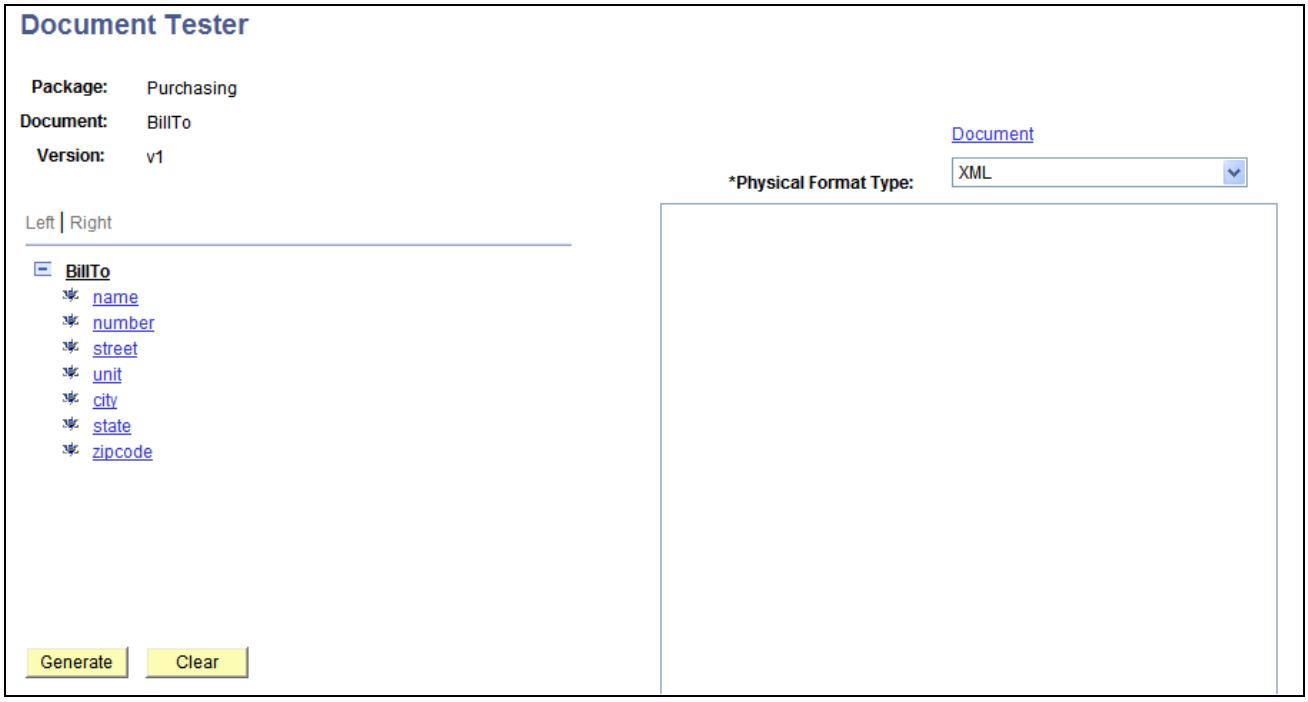
The Document Tester utility page (IB_LOGICALTESTER) is located in the IB_LOGICALTESTER component.

You can access the Document Tester utility page two ways:

- From the Document Tester link in the Document Builder (PeopleTools, Documents, Document Builder).

- Select PeopleTools, Documents, Document Utilities, Document Tester.

The following example shows the Document Tester page:



Document Tester page.

Entering Element Test Values

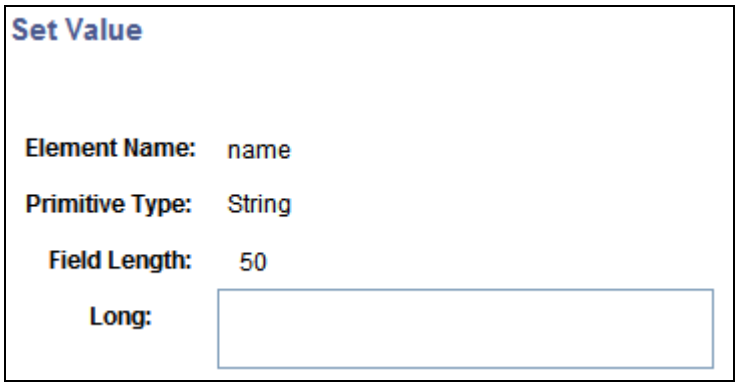
This section discusses how to:

- Enter test values for primitive elements.
- Append and delete collection element items.

Entering Test Values for Primitive Elements

The Document Tester utility enables you to enter test values for primitive elements.

When you select a primitive element in the document tree, a Set Value page (IB_LSTESTER_SEC) appears where you can set a test value for the element. The following example shows the Set Value page:



Set Value page.

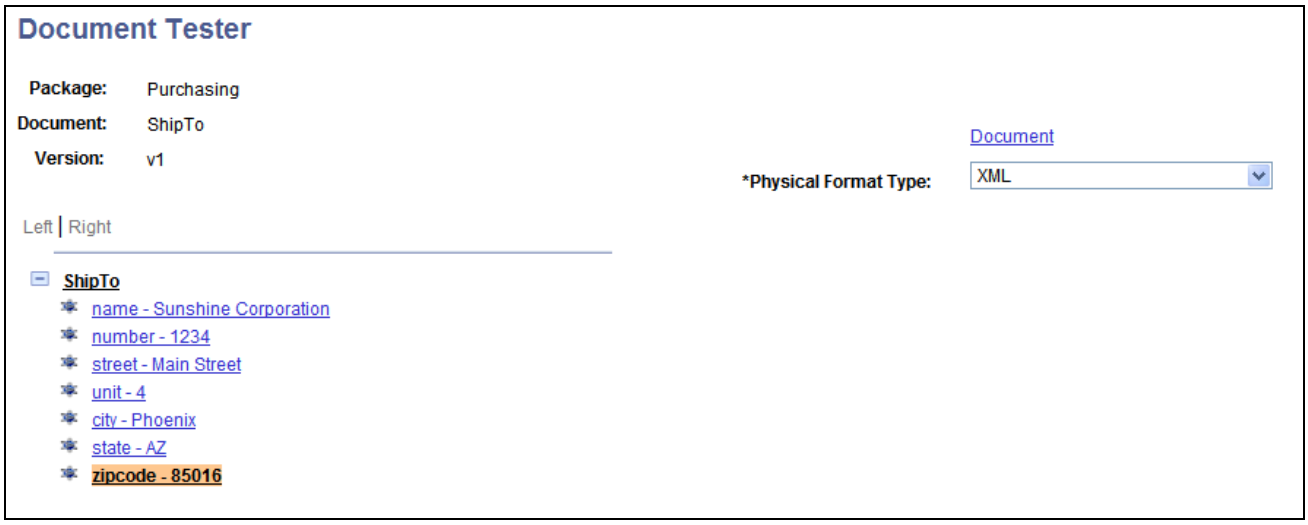
The Element Name field displays the element name with which you're working. The Primitive Type field and Field Length field display the data type and length as defined for the element in the Document Builder.

The name of the field where you enter a test value depends on the data type. In the previous example, the data type is a string, and therefore the system prompts you to enter a Long value. The following table lists the possible labels for the field where you enter a test value:

Data Type	***Primitive Type Field Label***	***Test Value Field Label***
Binary	Bin	Long
Boolean	Bool	Page displays a check box.
Character	Character	Char
Date	Date	Date
DateTime	DT	Datetime
Decimal	Dec	Numeric
Integer	Int	Numeric
String	String	Long
Text	Text	Long
Time	Time	Time

The data type and field length that display are those that are defined for the document in the Document Builder.

After you enter test values, each value appears next to the corresponding element in the document tree on the main Document Tester page. The following example shows the appearance of the document tree for the *ShipTo* document after test values have been entered:



Test values entered for all the primitive elements of the ShipTo document.

To enter test values for primitive elements:

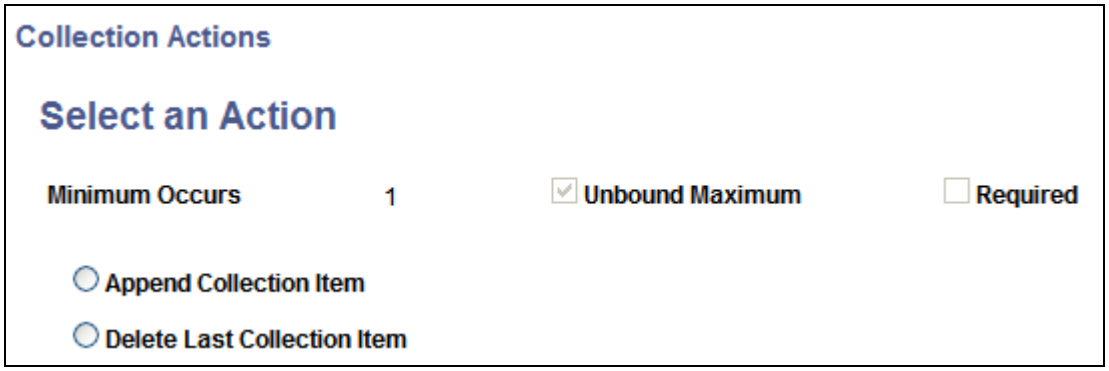
1. Access the Document Tester (PeopleTools, Documents, Document Utilities, Document Tester).
2. Click the name of a primitive element for which to enter a test value.

   The Set Value page appears.
3. In the Long field, enter a test value.
4. Click the OK button.

Appending and Deleting Collection Element Items

You can append a collection item with a copy of the last row in the collection or delete the last row in a collection.

To accomplish either task, use the Collection Actions - Select an Action page (IB_LSTESTER2_SEC). When you click the name of a collection element in the document tree, the Collection Actions - Select an Action page appears. The following example shows the page:



Collection Actions - Select an Action page.

The system displays properties for the element, such as minimum occurs, unbound maximum, and required, as defined for the document in the Document Builder.

Appending Collection Elements

To append a collection element with a copy of the last row in the collection:

1. Access the Document Tester (PeopleTools, Documents, Document Utilities, Document Tester).
2. Click the name of a collection element.

   The Collection Actions - Select an Action page appears.
3. Select Append Collection Item.
4. Click the OK button.

The Document Tester page appears, and the collection element is appended with a copy of the last row in the collection.

Deleting Collection Elements

To delete a collection row:

1. Access the Document Tester (PeopleTools, Documents, Document Utilities, Document Tester).
2. Click the name of a collection element.

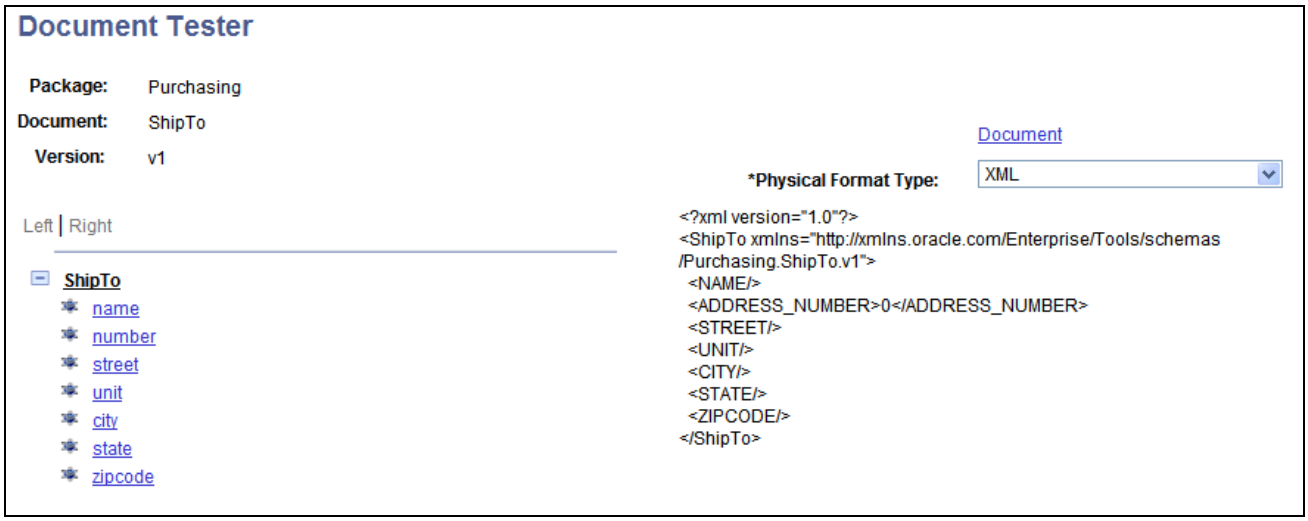
   The Collection Actions - Select an Action page appears.
3. Select Delete Last Collection Item.
4. Click the OK button.

The Document Tester page appears, and the last row in the collection is deleted.

Generating and Viewing Test Documents

When you generate a test document in the Document Tester, the generated XML appears on the right side of the Document Tester page.

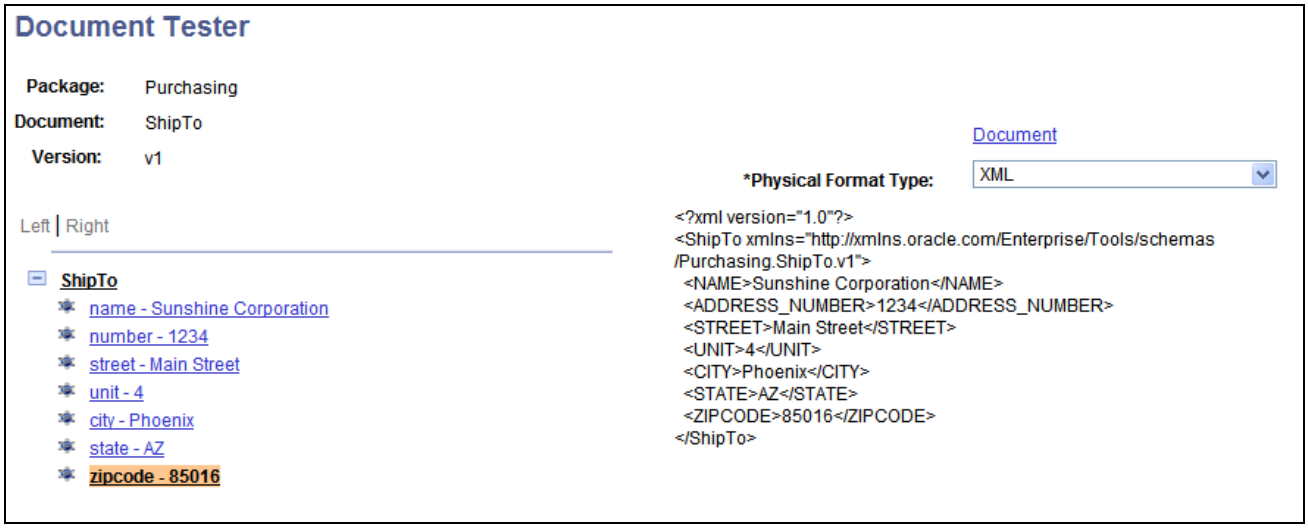
The following example shows an XML document generated for the *ShipTo* document:



Test output generated with no test values specified.

When you view the output you'll note that no test values were specified for the primitive elements.

The following example shows test output generated for the *ShipTo* document using specified test values:



Test output generated with test values specified.

To generate and view test documents:

1. Access the Document Tester page (PeopleTools, Documents, Document Utilities, Document Tester).
2. Enter any optional test values and actions as described elsewhere in this chapter.
3. From the Physical Format Type drop-down list box, select the document format to generate.

   XML is the default format and is currently the only physical format available to generate.
4. Click the Generate button at the bottom of the page.

The test document in the physical format selected appears on the right side of the page.

Clearing Document Tester Utility Data

This section discuses how to:

- Clear Document Tester output.
- Clear test values and actions.

Clearing Document Tester Output

To clear generated test output, for example, generated XML, click the Clear button at the bottom of the Document Tester utility page.

Clearing Test Values and Actions

This section discusses how to clear primitive element test values and collection element actions.

Clearing Primitive Element Test Values

To clear primitive element test values:

- To clear one or several values, click an element in the document tree to open the Set Value page. Manually clear the value.
- To clear all test values, exit the Document Tester and reopen it.

Clearing Collection Element Actions

To clear collection element actions:

- To clear an appended collection element, click the element in the document tree to open the Select an Action page. Select Delete Last Collection Item.
- To add back a deleted collection element, click the element in the document tree to open the Select an Action page. Select Append Collection Item.
- To clear all test actions, exit the Document Tester and reopen it.

Chapter 15

Updating Document Schema Target Locations

This chapter provides an overview of updating document schema target locations and discusses how to:

- Access the Update Target Location utility.
- Update target locations for document schemas.

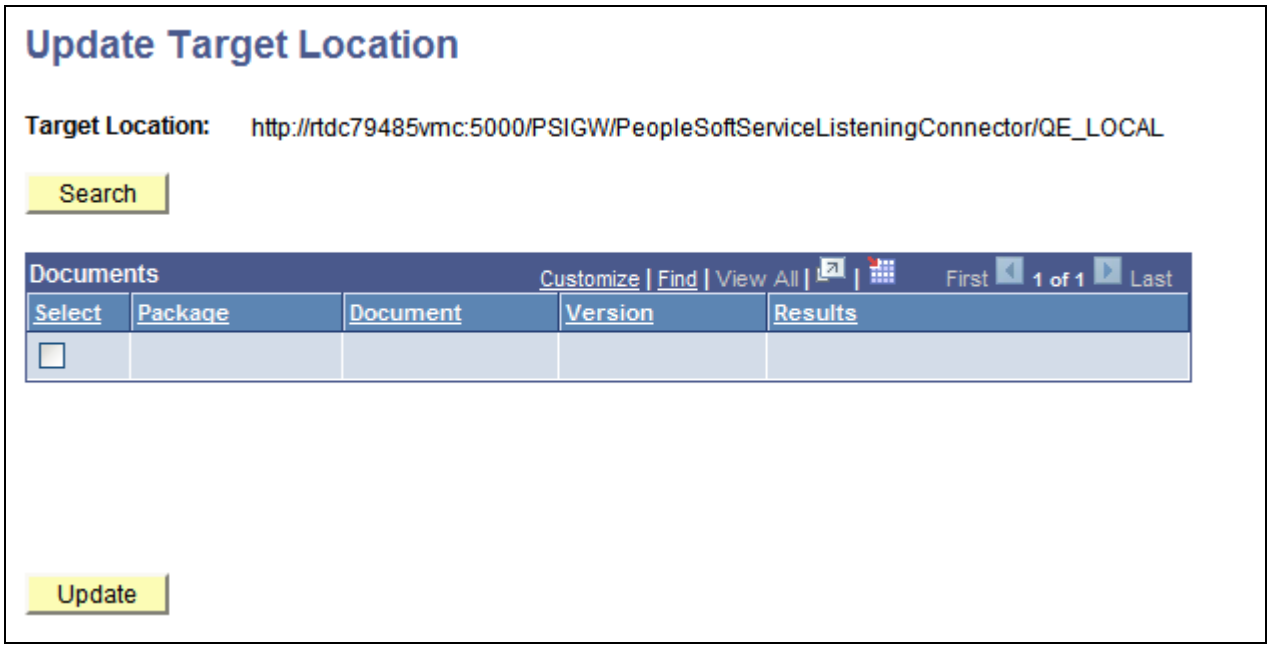
Understanding Updating Document Schema Target Locations

When you save a document, the PeopleSoft system uses the target location URL defined in the Service Configuration page (PeopleTools, Integration Broker, Service Configuration) to build the XML document schema.

The target location for schemas can potentially change in development mode or when documents are imported using the Project Copy process. PeopleSoft provides a Update Target Location utility that enables you to update document schema in the system that are using target locations other than that defined in the Service Configuration page.

Accessing the Update Target Location Utility

To access the Update Target Location utility page (IB_DOCUMENT_TARGET) in the IB_DOCUMENT_TARGET select PeopleTools, Documents, Document Utilities, Update Target Location. The following example shows the page:



The Update Target Location page.

Updating Target Locations for Document Schema

The Update Target Location utility page lists documents that have a schema defined in a location other than the target location specified on the Service Configuration page. You can rebuild the schemas using the target location specified in the Service Configuration page.

Note that when you access the Update Target Location page, the target location URL as defined on the Service Configuration page appears at the top of the page.

To update schema target locations:

1. Access the Update Target Location page (PeopleTools, Documents, Document Utilities, Update Target Location).
2. Click the Search button.

   Any schemas that have a target location other than the one defined on the Service Configuration page appear in the Documents grid.
3. Select the Select check box next to each document to update the schema target location.
4. Click the Update button.

Chapter 16

Validating Document References to Object Metadata

This chapter provides an overview of validating document references to object metadata and discusses how to:

- Access the Document/Metadata Validation utility.
- Validate document metadata references.
- Validate document message type references.
- Validate relational document record and field maps.

Understanding Validating Document References to Metadata

PeopleSoft provides a Document/Metadata Validation utility that enables you to identify documents that are not properly coupled to other metadata objects and data. Typically, this situation occurs:

- After the Project Copy process, when related metadata objects are not included in a project.
- During development, when other developers modify metadata, such as records and fields.

After you identify the invalid references, you can either manually correct or create the necessary metadata in the database, or you can use the utility option to clear the invalid reference.

The Document/Metadata Validation utility features Documents, Messages, and Relational tabs that enable you to validate metadata references as described in the following table:

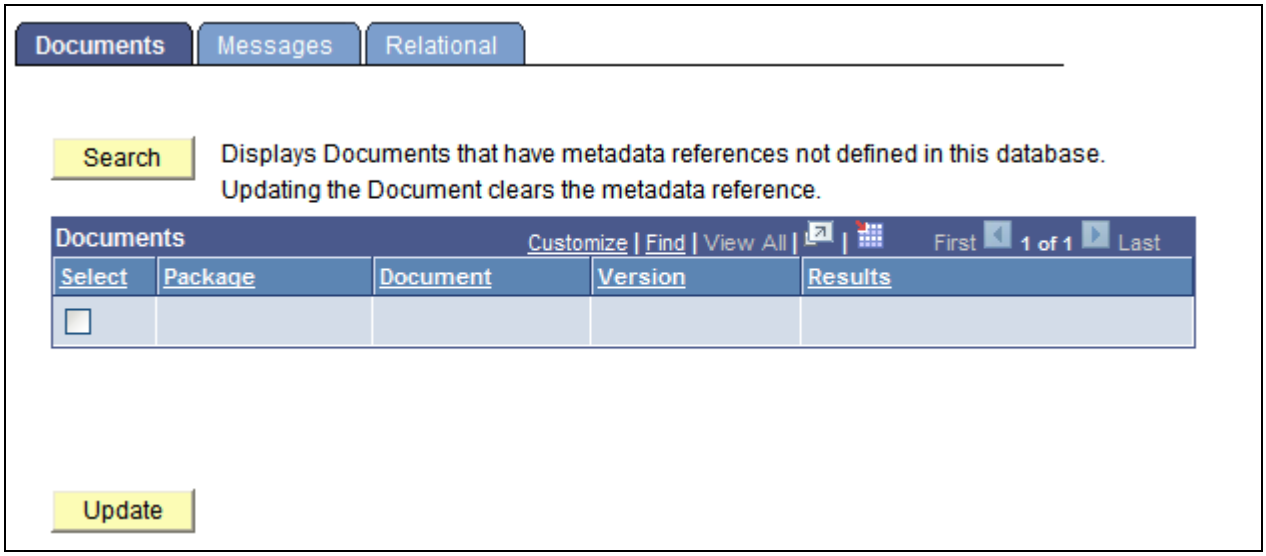
Tab	***Description***
Documents	Displays any documents that have references to metadata that is not in the current database. For an example, *Document A* could contain a compound element that is another document, *Document B.* If *Document B* is not in the current database, then the utility would identify it and display it in the utility.
Messages	You can define documents as a message type in PeopleSoft Integration Broker. The Messages tab displays messages that reference documents that are not defined in this database.

Tab	*Description*
Relational	Displays any invalid record and field maps defined for relational-formatted documents.

Accessing the Document/Metadata Validation Utility

The Document/Metadata Validation utility (IB_DOCUMENT_VALIDT) is located in the IB_DOCUMENT_VALIDT component.

To access the page, select PeopleTools, Documents, Document Utilities, Document/Metadata Validation. The following example shows the page:



The Document/Metadata Validation - Documents page.

Validating Document Metadata References

Use the Documents page (IB_DOCUMENT_VALIDT) of the Document/Metadata Validation utility to identify any documents that reference metadata not in the database.

To validate document metadata references:

1. Access the Document/Metadata Validation - Documents page (PeopleTools, Documents, Document Utilities, Document/Metadata Validation).
2. Click the Search button.

   Any documents in the database that reference metadata not in the database appear in the Documents grid.

3. Manage the results by performing any of the following actions:

   - Clear the metadata reference.

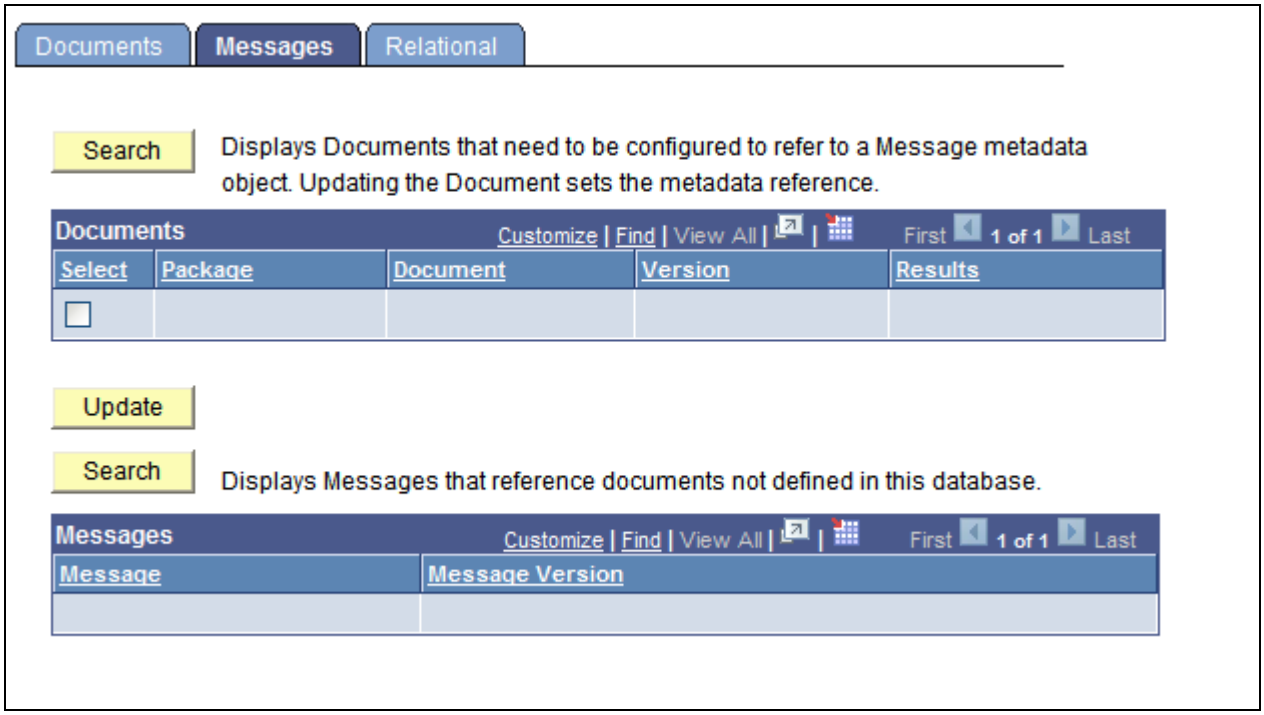
     Select the Select check box next to each document for which to clear the invalid or missing reference, and then click the Update button.

   - Examine the document definition and import or create the missing metadata.

Validate Document Message Type References

Documents can be defined as a message type in PeopleSoft Integration Broker. Use the Document/Metadata Validation - Messages page (IB_DOCUMENT_VDMSG) to resolve issues with the documents or messages used in this message type.

The following example shows the page:



Document/Metadata Validation - Messages page.

Identifying and Resolving Message Definitions that have Missing References to Documents

A message definition can have a missing reference to a document when the following situation occurs:

- You define a document as a message type in System A. You then copy only the message to System B because System B already has a copy of the document in the database.

- You define a document as a message type in System A. You then copy the message and document to System B in stages, first copying the message definition and then copying the document.

In either case, the message-document link gets broken, and the link needs to be reestablished. Use the upper grid on the Document/Metadata Validation - Messages page to identify and resolve this inconsistency.

To identify and resolve message definitions that have missing references to documents:

1. Access the Document/Metadata Validation - Document page (PeopleTools, Documents, Document Utilities, Document/Metadata Validation).
2. Click the Messages tab.

   The Document/Metadata Validation - Messages page appears.
3. Above the Documents grid, click the Search button to display all documents in the system that have missing references to message definitions.

   The results appear in the Documents grid.
4. Select the Select check box next to each document you want to update.
5. Click the Update button.

Identifying Messages that Reference Documents Not in the Current Database

Use the bottom grid on the Document/Metadata Validation - Messages page to identify messages in the system that reference documents that are not currently defined in the database.

This situation can occur when you define a document as a message type in PeopleSoft Integration Broker in a database, and then copy the message to a new database and do not include the document in the project copy process.

To identify messages with invalid references to documents:

1. Access the Document/Metadata Validation- Documents page (PeopleTools, Documents, Document Utilities, Document/Metadata Validation).
2. Click the Messages tab.

   The Document/Metadata Validation - Messages page appears.
3. Just above the Messages grid at the bottom of the page, click the Search button.

   Any messages in the database that reference documents not in the database appear in the Messages grid.

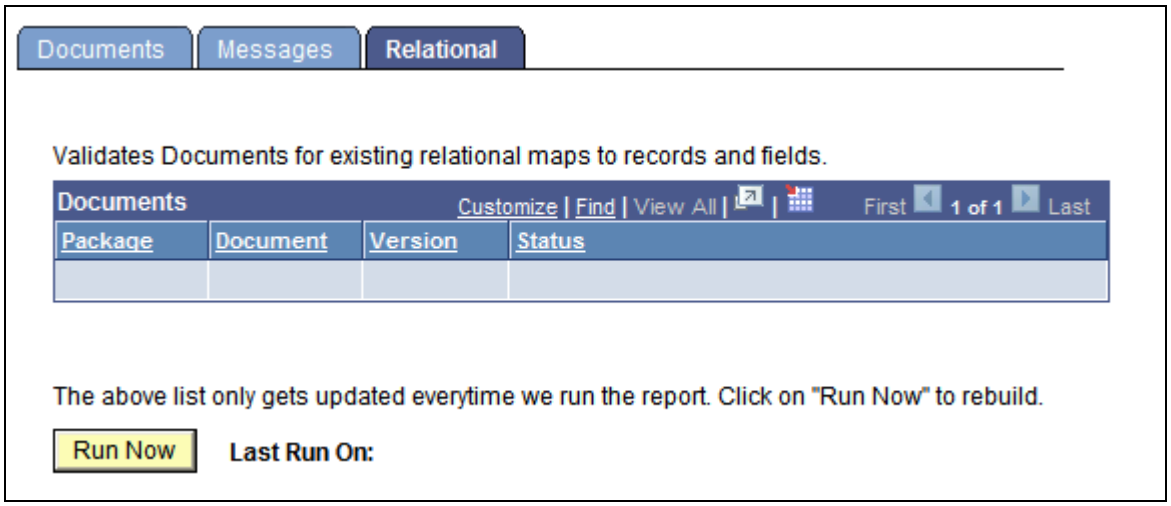
To resolve the invalid references, go to the source database and copy the documents to the current database or create new documents in the current database.

Validating Relational Document Record and Field Maps

For documents that have relational maps defined to PeopleSoft records and fields, other database users may be able to modify the records or fields. When changes are made to records and fields, PeopleSoft Application Designer does not perform any validation against document metadata.

Use the Document/Metadata Validation - Relational page (IB_DOCUMENT_VDREC) to run an application engine program to validate all documents in the database that have relational maps defined.

To access the Document/Metadata Validation - Relational page, select PeopleTools, Documents, Document Utilities, Document/Metadata Validation and click the Relational tab. The following example shows the page:



The Document/Metadata Validation - Relational page.

If the application engine program was run previously on the database, the date and time it was run appear in Last Run On field.

To validate relational document record and field maps:

1. Access the Document/Metadata Validation - Relational page (PeopleTools, Documents, Document Utilities, Document/Metadata Validation).
2. Click the Run Now button.

Documents that have invalid relational maps appear in the Documents grid. Open each document and correct the relational map.

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