

webMethods

PIP Tools

Version 7.1

webMethods PIP Tools Installation
and User's Guide

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About This Guide

This guide describes how to install and use the webMethods PIP Tools to create RosettaNet-compliant PIPs from the RosettaNet-distributed DTDs, XSDs, and PIP specifications. It contains information for administrators and application developers who want to install and use the PIP Tools to import PIPs distributed by RosettaNet.

To use this guide effectively, you should:

- Be familiar with the webMethods Integration Server, the Server Administrator, and the webMethods Developer and understand the concepts and procedures described in the *webMethods Server Administrator's Guide* and the *webMethods Developer User's Guide*.
- Be familiar with the webMethods Trading Networks user interface and understand the concepts and procedures described in the various webMethods Trading Networks guides.
- Be familiar with the webMethods RosettaNet Module and understand the concepts and procedures described in the various webMethods RosettaNet Module guides.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
<i>Italic</i>	Identifies variable information that you must supply or change based on your specific situation or environment. Identifies terms the first time they are defined in text. Also identifies service input and output variables.
Narrow font	Identifies storage locations for services on the webMethods Integration Server using the convention <i>folder.subfolder:service</i> .
Typewriter font	Identifies characters and values that you must type exactly or messages that the system displays on the console.
UPPERCASE	Identifies keyboard keys. Keys that you must press simultaneously are joined with the "+" symbol.
\	Directory paths use the "\" directory delimiter unless the subject is UNIX-specific.
[]	Optional keywords or values are enclosed in []. Do not type the [] symbols in your own code.

Additional Information

The webMethods Advantage Web site at <http://advantage.webmethods.com> provides you with important sources of information about webMethods products:

- **Troubleshooting Information.** The [webMethods Knowledge Base](#) provides troubleshooting information for many webMethods products.
- **Documentation Feedback.** To provide feedback on webMethods documentation, go to the [Documentation Feedback Form](#) on the [webMethods Bookshelf](#).
- **Additional Documentation.** Starting with 7.0, you have the option of downloading the documentation during product installation to a single directory called “_documentation,” located by default under the webMethods installation directory. In addition, you can find documentation for all webMethods products on the [webMethods Bookshelf](#).

Chapter 1. Concepts

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What Does webMethods PIP Tools Do?

webMethods PIP Tools enable you to create or import a webMethods implementation of a PIP (referred to as a PIP). You then can use the PIP with the webMethods RosettaNet Module to implement the corresponding PIP transactions in the webMethods product suite.

webMethods PIP Tools enable you to work with two types of PIPs:

- **DTD-based PIPs.** These are PIPs based on DTD files and are used with schema dictionaries.

If you are using DTD-based PIPs, you can use PIP Tools to create the PIP directly from the RosettaNet-distributed specifications and DTDs in combination with validation schemas you have downloaded from the RosettaNet web site or that you created for your own installation.

- **Modular PIPs.** These are PIPs based on these XML Schema (XSD) files.

If you are running webMethods RosettaNet Module 7.1 and webMethods PIP Tools 7.1 on Integration Server 7.1, you can use PIP Tools to import Modular PIPs. These XML schema-based PIPs are based on RosettaNet's New PIP Specification Format and do not require the use of a schema dictionary because they contain their own validation information.

What Does a PIP Contain?

When you create or import a PIP, the PIP Tools create the following in your webMethods product suite:

- **TN document types.** The PIP Tools create TN document types in Trading Networks. When a RosettaNet document is sent to the webMethods RosettaNet Module, the webMethods RosettaNet Module uses these TN document types to determine the type of RosettaNet document that was sent.
- **IS document types.** The PIP Tools create IS document types in the Integration Server namespace. These IS document types define the format of RosettaNet documents used by a PIP. The webMethods RosettaNet Module uses the IS document types to validate the structure of the RosettaNet documents.

- **Trading Partner Agreements (TPAs).** The PIP Tools create TPAs in Trading Networks. These TPAs contain:
 - PIP information, for example, the name and version of a PIP
 - Default transport parameters that can be modified on a trading partner basis, for example, the type of transport to use, the version of the transport, signing and encryption information

The webMethods RosettaNet Module uses the TPAs to specify parameters that are specific to a PIP, the transport to use, and the transport behavior.

By using the PIP Tools you can create or import the PIPs you need as they are released by RosettaNet without having to wait for Software AG or a third-party vendor to create them for you. Additionally, the PIP Tools enable you to manage the validation schemas that are related to the DTD-based PIPs you use in your production system.

How Do I Use PIPs?

After you create or import the PIP, you can use webMethods Designer to create the process model(s) that define how the PIP transaction is conducted with your trading partner. Software AG provides generic process models with the WmRosettaNet package that you can use as a basis for creating the PIP-related process models. For more information about creating process models for your PIPs, see the *webMethods RosettaNet Module Installation and User's Guide*.

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Creating DTD-based PIPs

You can use PIP Tools to create a PIP using a DTD file. The PIP then can be used in conjunction with a schema dictionary to process the PIP transaction.

 To create a DTD-based PIP

- 1 Import a general schema dictionary to use for validating the PIP:
 - Software AG provides an enhanced version of the official RosettaNet schema dictionary as part of the webMethods RosettaNet Module. The schema dictionary Software AG provides is located in the *Integration Server_directory*\packages\WmPIPTools\import\rosettanet_v2-1_webm.XML file.
 - OR–
 - From the RosettaNet web site (<http://www.rosettanet.org>), locate and download the PIP zip file for the dictionary that you want to use. Unzip the dictionary file into the *Integration Server_directory*\packages\WmPIPTools\import directory.



Note: During the process to create a PIP, you will use the PIP Tools Schema Management facilities to import the schema dictionary into the Integration Server as an IS schema. The PIP Tools reference this IS schema to further define the field constants and optional values for the IS document type for the PIP. For instructions for importing the schema description, see “[Importing a Schema Dictionary](#)” on page 23.

- 2 From the RosettaNet web site (<http://www.rosettanet.org>), locate and download and extract the PIP zip file for the PIP you want to create (for example, PIP3A4_MS_V02_00_PurchaseOrderRequest.zip) into the *Integration Server_directory*\packages\WmPIPTools\import directory.
The zip file contains the DTD(s) for the PIP, as well as the specification document and other files.
- 3 Ensure that the appropriate schema dictionary is in the *Integration Server_directory*\ packages\WmPIPTools\import directory.
- 4 Start the webMethods Integration Server and Server Administrator, if they are not already running.
- 5 Import the schema dictionary using the procedure described in “[Importing a Schema Dictionary](#)” on page 23.
- 6 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen displays in a new browser window.
- 7 From the RosettaNet Management screen, in the navigation area, click **PIP Builder**. The PIP Builder screen appears.

- 8 Specify the values for the fields in the **Build PIP** section of the screen.

You can find the correct values to specify from information that you downloaded from the RosettaNet web site. The following table describes where to look for the values to specify.

<u>For this field...</u>	<u>Where to look for the value to specify</u>
Pip Name	Front page of the RosettaNet Specification, for example, Request Purchase Order
Pip Number	Front page of the RosettaNet Specification, for example, 3A4
Pip Version	Front page of the RosettaNet Specification, for example, V02.00
Transaction	In the RosettaNet Specification, Table 3-2, column <i>Activity Name</i> , for example, Request Purchase Order
Action	In the RosettaNet Specification, Table 4-2, column <i>Business Action in FSV</i> , for example, Purchase Order Request Action
DTD	Included in the PIP zip file you downloaded and loaded into the <i>Integration Server_directory\packages\WmPIPTools\import</i> directory, for example, 3A4_MS_V02_00_PurchaseOrderRequest.dtd Note: The DTD that you downloaded should appear in the drop-down list.
From Role	In the RosettaNet Specification, Table 3-1, column <i>Role Name</i> , for example, Buyer
To Role	In the RosettaNet Specification, Table 3-1, column <i>Role Name</i> , for example, Seller
IS Schema Dictionary	Loaded into the <i>Integration Server_directory\packages\WmPIPTools\import</i> directory and imported using the Schema Import facilities, for example, rosettanet_v2_webm Note: The dictionary schema should appear in the drop-down list.
Has Response Document	Whether the Transaction has a response document; specify either True or False

- 9 Select either the **Reference** or the **Static** radio button beside the **IS Schema Dictionary** drop-down list to specify whether you want the schema information included in the IS document types by reference or by hardcoded entry, respectively.

If you select the **Reference**, the IS document types in the created PIP will point to the schema by reference. Alternatively, if you select the **Static**, the IS document types will actually include all schema values in the IS document types (that is, hardcoded, rather than referentially). The default is **Static**.

- 10 Select either the **True** or the **False** radio button for the **Has Response Document** field to specify whether the PIP does or does not contain or involve a response document, respectively.

If you select the **True** radio button for **Has Response Document**, the following additional data entry fields appear for you to specify information for the response document. You can find the correct values to specify for these fields from information that you downloaded from the RosettaNet web site. The following table describes where to look for the values to specify.

<u>For this field...</u>	<u>Where to look for the value to specify</u>
Response Action	In the RosettaNet Specification, Table 4-2, column <i>Business Action in FSV</i> , for example, Purchase Order Confirmation Action
Response DTD	Included in the PIP zip file you downloaded; loaded into the <i>Integration Server_directory</i> \packages\WmPIPTools\import directory, for example, 3A4_MS_V02_00_PurchaseOrderConfirmation.dtd

- 11 Click **Preview PIP**.

Any errors in the information that you supplied display on the screen next to the fields that are in error. Correct errors, consulting the RosettaNet-distributed Specification and the ? button beside each field. After you have made your corrections, click **Preview PIP** again.

When all information is correct and you click **Preview PIP**, the PIP Preview screen displays the IS document types, TN document types, and Trading Partner Agreements (TPAs) that the PIP Tools will create for the PIP.

12 Click **Build PIP**.

A message appears indicating the build was successful. PIP Tools creates *and* imports the PIP directly into your webMethods product suite. That is, the TN document types and TPAs are imported into webMethods Trading Networks and the IS document types are available in the Integration Server namespace. If you want to create a process archive file (.par file) to share the PIP with your trading partners, you must use the webMethods RosettaNet Module PIP export procedures. See the *webMethods RosettaNet Module Installation and User's Guide* for further information.

After you have created the PIP, you now can use webMethods Designer to create a process model for the PIP transaction. For instructions on creating the process model, see the *webMethods RosettaNet Module Installation and User's Guide*.

Importing Modular PIPs

You can use PIP Tools to create a Modular PIP using an XSD file. This Modular PIP, which does not require a schema dictionary, can then be used to process the PIP transaction.



Tip! If you are using webMethods Integration Server 4.6, you can install webMethods Integration Server 7.1, import a Modular PIP, and then export the PIP to Integration Server 4.6 using webMethods PIP Tools.

To import a Modular PIP

- 1 From the RosettaNet web site (<http://www.rosettanet.org>), download the Modular PIP XSD zip file that you want to import (for example, PIP4A3_R11.01_NotifyOfThresholdRelease Forecast.zip) into the *Integration Server_directory\WmPIPTools\import* folder.
- 2 Start webMethods Integration Server and Server Administrator, if they are not already running.
- 3 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen displays in a new browser window.
- 4 From the RosettaNet Management screen, in the navigation area, click **Modular PIP Import**. A screen appears listing all of the PIP XSDs in the *Integration Server_directory\WmPIPTools\import* folder.
- 5 From the list, select the Modular PIP XSD file that you want to import, and then click **View**. A screen appears listing the items that will be imported.



Note: If you are re-importing this PIP, you will need to clear the check boxes for items that you do not want to re-import. Selected items will overwrite their existing counterparts on the Integration Server.

- 6 Click **Import**. A screen appears indicating whether the import was successful.

webMethods PIP Tools places the IS document types in the *Integration Server_directory*\packages\WmRNPips\ns\wm\b2b\rn\rec\PIP\PipNumberAndVersion directory. webMethods PIP Tools also automatically stores any IS schema that is common to different PIPs (for example, country codes) in the *Integration Server_directory*\packages\WmRNPips\ns\wm\b2b\rn\rec\PIP\common directory using a directory structure similar to that defined in the PIP XSD zip file.

If you want to create a process archive file (.par file) to share the PIP with your trading partners, you must use the webMethods RosettaNet Module PIP export procedures. See the *webMethods RosettaNet Module Installation and User's Guide* for further information.

After you have imported the PIP, you now can use webMethods Designer to create a process model for the PIP transaction. For instructions on creating the process model, see the *webMethods RosettaNet Module Installation and User's Guide*.

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Overview

This chapter explains how to install the PIP Tools.



Important! The information in this chapter might have been updated since the guide was published. Go to the webMethods Advantage Web site at <http://advantage.webmethods.com> for the latest version of the guide.

If you are installing the PIP Tools with other products in the webMethods product suite, such as the webMethods RosettaNet Module, see the *webMethods RosettaNet Module Installation and User's Guide* for instructions to install those products.

Requirements

This section describes the system requirements that must be met before you can install the PIP Tools.

Platform and Operating System Requirements

The PIP Tools has no system requirements beyond those of the webMethods Integration Server. For Integration Server system requirements, see the *webMethods Installation Guide*.

webMethods Software Requirements

The table below lists the webMethods products you must install before or at the same time you install the PIP Tools. The table also lists the webMethods products you must install at some point for the PIP Tools to operate fully.

Required for Installation	Required for Operation
Integration Server 7.1	webMethods Developer 7.1
Trading Networks Server 7.1	Trading Networks user interface 7.1
	webMethods Designer 7.1
	My webMethods Server 7.1

Third-Party Software Requirements

None.

Database Requirements

None.

Hardware Requirements

The PIP Tools has no hardware requirements beyond those for the Integration Server. For Integration Server hardware requirements, see the *webMethods Installation Guide*.

webMethods Component Compatibility

webMethods Integration Server 7.1, webMethods Trading Networks 7.1, webMethods Developer 7.1, webMethods Designer 7.1, and webMethods Monitor 7.1 are compatible with the PIP Tools Version 7.1. For information about the Service Packs and Fixes needed for these products, see “[webMethods Software Requirements](#)” on page 18.

Installing PIP Tools



Note: This section provides only instructions that are specific to installing the PIP Tools. For complete instructions on using the webMethods Installer, see the *webMethods Installation Guide*.



Important! You must have administrator privileges on Integration Server to execute these procedures. If you do not have administrator privileges, have your Integration Server administrator perform these procedures.

To install the PIP Tools

- 1 Download the webMethods Installer 7.1 from the webMethods Advantage Web site at <http://advantage.webmethods.com> and start the installer.
- 2 If you are going to install PIP Tools 7.1 on an already installed Integration Server, shut down the Integration Server.
- 3 Specify the PIP Tools installation directory as the webMethods installation directory (by default, webMethods7).
- 4 In the product selection list, select eStandards > webMethods RosettaNet Module 7.1 > PIP Tools > Program Files.
- 5 Complete the installation process.
- 6 Restart the Integration Server. The PIP Tools will start automatically.

Uninstalling PIP Tools



Note: This section provides only instructions that are specific to uninstalling PIP Tools. For complete instructions on using the webMethods Uninstaller, see the *webMethods Installation Guide*.

To uninstall PIP Tools

- 1 Shut down all the webMethods products and applications that are running on your machine.
- 2 Start the webMethods Uninstaller.
- 3 In the product selection list, select eStandards > webMethods RosettaNet Module 7.1 > PIP Tools.
- 4 The Uninstaller removes all PIP Tools-related files that were installed into the *Integration Server_directory*\packages directory. The Uninstaller does not delete files created after you installed the PIP Tools (for example, user-created or configuration files), nor does it delete the directory structure that contains the files.
- 5 If you do not want to save the files that the Uninstaller did not delete, navigate to the *Integration Server_directory*\packages directory and delete the PIP Tools-related folders.

Chapter 4. Managing Schema Dictionaries for DTD-based PIPs

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Managing Schema Dictionaries

Using the webMethods PIP Tools, you can import, export, and migrate schema dictionaries for use with DTD-based PIPs. A schema dictionary contains a definition for each RosettaNet element.

When you create a PIP, you select whether you want the schema dictionary information included in the IS document type that the PIP Tools create (static) or whether you want the IS document type to reference the schema dictionary information (reference). Based on your selection, during PIP creation the PIP Tools look up the element definition in the schema dictionary and either apply the element definition to the IS document type (static) or apply a reference in the IS document type to the dictionary schema (reference).

The following table lists the tasks you can perform to manage your schema dictionaries:

Task	Description
Import schema dictionaries	<p>You can import a schema dictionary from an XML file. Use the import function along with the export function to modify or clone schemas in your webMethods installation and upgrade schema dictionaries as new ones are released by the RosettaNet organization.</p> <p>For example, you can modify your schema dictionary using an XML editor, and then import the XML file containing the modified schema, either to replace an existing version of the schema dictionary or to create a new, independent schema dictionary.</p>
Export schema dictionaries	<p>You can export a schema dictionary to an XML file. Use the export function along with the import function to modify or clone schemas in your webMethods installation and upgrade schema dictionaries as new ones are released by the RosettaNet organization.</p> <p>For example, you can export a customized schema dictionary to an XML file, make modifications to the XML file, and then use the import function to re-import the updated schema dictionary.</p>
Migrate schema dictionaries	<p>You can migrate your PIPs from one schema to another. This facility is useful when you have an updated schema dictionary with new IS document types or values and want to make an existing PIP use the new schema dictionary. This is typical of the case where you have downloaded a new version of a schema dictionary from the RosettaNet web site.</p>

Importing a Schema Dictionary

To import an XML file as a schema dictionary, perform the following steps.

To import a schema dictionary

- 1 Copy the schema dictionary file(s) that you want to import into the *Integration Server_directory*\packages\WmPIPTools\import directory.
- 2 Start the webMethods Integration Server and Server Administrator, if they are not already running.
- 3 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen is displayed in a new browser window.
- 4 From the RosettaNet Management screen, in the navigation area, click **Schema Management**. The Schema Management screen is displayed.
- 5 From the **Dictionary XML File** drop-down list, select the name of the XML file that you want to import as a schema dictionary.
- 6 Select the **Merge** or **Overwrite** radio button to indicate whether you want the PIP Tools to append the imported file to any existing schema dictionary with the same name or to overwrite any existing schema dictionary of the same name.
 - If you select **Merge**, the PIP Tools evaluate each field or IS document type individually. The PIP Tools add new fields or IS document types to the merged file.

Existing fields or IS document types must match in structure (i.e., in data type); the PIP Tools add any differences in constraint values in the IS document type or field to be merged to the existing IS document type or field.

The PIP Tools generate an error for existing IS document types or fields that do not match structurally. You must ensure that no such mismatches are present in the schema dictionary you want to import.
 - If you select **Overwrite**, the PIP Tools overwrite the existing schema dictionary file with the new file.
- 7 Click **Import Schema**.

The PIP Tools display a message indicating the import was successful.

The PIP Tools import the XML file as a schema dictionary and the schema dictionary becomes available to use, for example to migrate your PIPs from one schema dictionary to another or to create a PIP.



Tip! You can view and edit an imported schema dictionary using webMethods Developer and examining the WmPIPTools package.



Note: You can use webMethods Developer to delete an imported schema dictionary. Doing so deletes the schema dictionary from your Integration Server run-time system, but does not remove the schema dictionary's XML file from the *Integration Server_directory\packages\WmPIPTools\import* directory. Similarly, deleting the XML file from the import directory prevents you from importing the schema dictionary, but does not remove it from the run-time system if it has already been imported. Deleting the XML file from the import directory and deleting the imported schema dictionary using webMethods Developer completely removes the schema dictionary from your installation.

Exporting a Schema Dictionary

To export a schema to an XML file, perform the following steps.

To export a schema dictionary

- 1 Start webMethods Integration Server and Server Administrator, if they are not already running.
- 2 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen is displayed in a new browser window.
- 3 From the RosettaNet Management screen, in the navigation area, click **Schema Management**. The Schema Management screen is displayed.
- 4 From the IS Schema drop-down list, select the name of the schema that you want to export as an XML file.
- 5 Click **Export Schema**.

The PIP Tools display a message indicating the export was successful.

The PIP Tools export the schema dictionary as an XML file with the same name as the schema dictionary into the *Integration Server_directory\packages\WmPIPTools\export* directory.



Tip! You can view and edit an exported schema dictionary's XML file using any common XML editor.

Migrating a Schema Dictionary

In general, migrating a schema dictionary involves one of the three following actions:


- **Referenced schema to referenced schema.** Taking a set of IS document types that refer to a specific schema and editing them so that they refer to another specific schema.
- **Referenced schema to static schema.** Taking a set of IS document types that refer to a specific schema and editing them so that they no longer refer to a schema, but stand on their own.
- **Static schema to referenced schema.** Taking a set of IS document types that does not refer to a specific schema and editing them so that they refer to a specific schema.

The PIP Tools schema migration allows you to make these changes automatically, rather than by hand. Migrating schema dictionaries is useful when upgrading from one version of a schema dictionary to a new version.

Note that when you created your PIP using the PIP Builder screens, you had to select whether the schema dictionary that the PIP used was referenced or static. The choice you made affects the actions you must take against PIPs after you update a schema dictionary.

- **Referenced schema dictionaries.** If the schema dictionary is referenced, you can export a schema dictionary, modify it, and then re-import it using the same schema dictionary name, and your PIPs will automatically use the new values.
- **Static schema dictionaries.** If the schema dictionary is static, you must either re-create the PIP if you modify the schema dictionary upon which the PIP is based or reference it to another schema.

Migrating from Referenced Schema to Referenced Schema


 To migrate from a referenced schema dictionary to another referenced schema dictionary

- 1 Make sure that you have imported the schema dictionary to which you are migrating before performing the migration procedure.
- 2 Start webMethods Integration Server and Server Administrator, if they are not already running.
- 3 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen is displayed in a new browser window.
- 4 From the RosettaNet Management screen, in the navigation area, click **Schema Management**. The Schema Management screen appears.
- 5 From the **Namespace Folder** drop-down list, select the name of the folder that contains the IS document types you want to migrate.

- 6 From the **from IS Schema** drop-down list, select the name of the schema dictionary to which the IS document types currently refer.
- 7 From the **to IS Schema** drop-down list, select the name of the schema dictionary to which you want to migrate the IS document types.
- 8 Click **Migrate Schema**.

The PIP Tools display a message indicating that the migration was successful. The IS document types are migrated to the new schema dictionary. The old schema dictionary is not deleted from your webMethods installation.


Migrating from Reference Schema to Static Schema

 To migrate from a referenced schema dictionary to a static schema dictionary

- 1 Make sure that you have imported the schema dictionary to which you are migrating before performing the migration procedure.
- 2 Start webMethods Integration Server and Server Administrator, if they are not already running.
- 3 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen is displayed in a new browser window.
- 4 From the RosettaNet Management screen, in the navigation area, click **Schema Management**. The Schema Management screen appears.
- 5 From the **Namespace Folder** drop-down list, select the name of the folder that contains the IS document types you want to migrate.
- 6 From the **from IS Schema** drop-down list, select the name of the schema dictionary to which the IS document types currently refer.
- 7 From the **to IS Schema** drop-down list, select **<Static>**.
- 8 Click **Migrate Schema**.

The PIP Tools display a message indicating that the migration was successful. The IS document types are disconnected from the original schema dictionary. The old schema dictionary is not deleted from your webMethods installation.

Migrating from Static Schema to Referenced Schema

 To migrate from a static schema dictionary to a referenced schema dictionary

- 1 Make sure that you have imported the schema dictionary to which you are migrating before performing the migration procedure.
- 2 Start webMethods Integration Server and Server Administrator, if they are not already running.
- 3 From the Server Administrator: **Adapters > RosettaNet**. The RosettaNet Management screen is displayed in a new browser window.
- 4 From the RosettaNet Management screen, in the navigation area, click **Schema Management**. The Schema Management screen appears.
- 5 From the **Namespace Folder** drop-down list, select the name of the folder that contains the IS document types you want to migrate.
- 6 From the **from IS Schema** drop-down list, select the blank line.
- 7 From the **to IS Schema** drop-down list, select the name of the schema dictionary to which you want to migrate the IS document types.
- 8 Click **Migrate Schema**.

The PIP Tools display a message indicating that the migration was successful. The IS document types are migrated to a schema dictionary.

