

# **TIBCO Foresight® Products**

## **Guideline Merge**

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# Overview

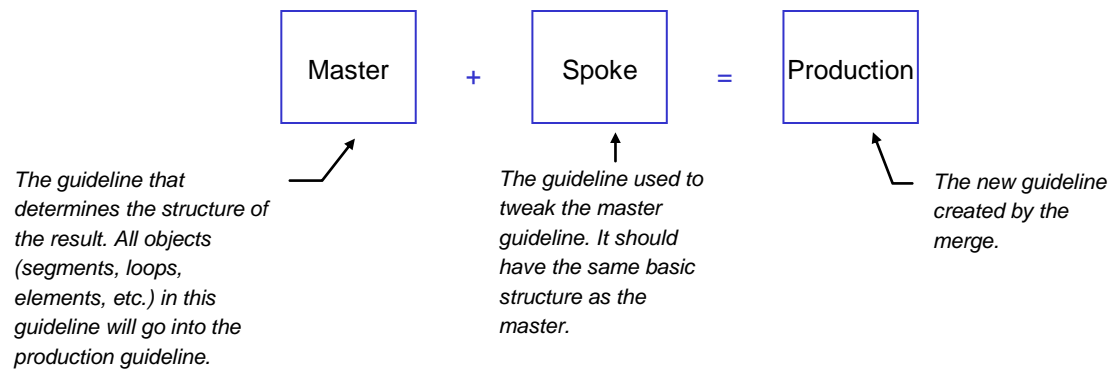
GuideMerge installs with TIBCO Foresight® HIPAA Validator® Desktop, TIBCO Foresight® EDISIM®, and Windows versions of TIBCO Foresight® Instream®.

Guideline Merge lets you merge the changes that you have made to your guideline in EDISIM® Standards Editor with:

- TIBCO Foresight-supplied guidelines containing other HIPAA rules
- Another EDI or flat file guideline with the same structure.

This lets you have a “master” guideline and then separate guidelines with additional rules for specific partners, for example.

The parties in a merge are:



## General merging concepts

- The master guideline takes precedence except where noted below.
- If an object is mandatory in the spoke, then it is mandatory in the production guideline. This cannot be changed.
- If an object is required or must be used in the spoke, then it is the same in the production guideline. However, you can prevent this with the **None** option under Force User Attribute Overrides.
- The structure of the master is used for the production guideline. All items in the master will be in the production guideline, and no other items will be in it, regardless of what is in the spoke.
- If an object is in both the master and spoke, changes to them (user attributes, notes, codes, etc.) will merge.
- Rearranged objects will not merge.

## Merging notes

Default merging behavior:

- Level 2 notes - Spoke guideline has preference.
- Levels 1 and 3 - Master guideline has preference.
- Levels 4 and above - Master guideline note has preference.

	Spoke guideline has note	Master guideline has note	Result in production guideline
<b>Level 2</b>	X	X	spoke note
			no note
		X	no note
	X		spoke note
<b>Levels 1 and 3</b>	X	X	master note
			no note
	X		no note
		X	master note
<b>All other levels</b>	X	X	master note
			no note
	X		spoke note
		X	master note

## Merging Codes and Application Values

### Codes

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- Code lists in the master are always inherited by the production guideline and are attached in the same places.
- Code lists in the spoke are put in the production guideline but they are not attached anywhere.
- Master and spoke rules that refer to code lists will work properly in the production guideline.
- Code lists in the master that are attached in multiple places will operate the same way in the production guideline.

### Example

Code set attached to element in spoke	S1, S2
Codes set attached to element in master	M1, M2, M3
Resulting code set in production	M1, M2, M3 - code set attached to element S1, S2 - code set for that element but not attached anywhere

### Application Values

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- Application value lists in the master are put in the production guideline and attached the same way.
- Application value lists in the spoke are put in the production guideline but are not attached anywhere. If they have the same name as a list in the master, they are renamed and business rules that use them are changed accordingly.

## Merging Business Rules

Variables:

- All spoke business rule variable names are merged.
- If a spoke variable has the same name as one from the master, it will be renamed, and any spoke references to that variable will be modified accordingly.

Business rules:

- The default order for production guide rules is:
  1. Master rules
  2. Spoke rules
- The **-rs** (“rules from spoke”) command line parameter moves the spoke rules ahead of the master rules.
- The **-rn** (“rules none”) command line parameter deletes all rules.

## Information Needed Before Merging

You will need the names and locations of three guidelines before running a merge:

Guideline	Contains ...	Usual Location
Master guideline	Contains the structure that you want for the production guideline.  HIPAA users: this is the levels 1-7 HIPAA guideline provided by TIBCO Foresight.	<i>One of these:</i>  EDISIM's User Files\Public Guidelines directory.  HIPAA Validator® Desktop's Database directory.  Instream®'s Database directory.
Spoke guideline	Typically contains your own company business rules. This guideline is usually created at your company with EDISIM Standards Editor.	EDISIM's User Files\Public Guidelines directory.
Production guideline	Company business rules plus Factory rules.  For HIPAA users: Company business rules plus all levels of the HIPAA rules.	Create in any directory.  For use with HIPAA Validator Desktop, copy to HIPAA Validator Desktop's Database directory.  For use with Instream, copy to Instream's database directory.  For use with EDISIM, copy to EDISIM's User Files\ Public Guidelines directory (guideline cannot be used with EDISIM if it is merged with a HIPAA levels 1-7 guideline).

### HIPAA Users: Identifying a TIBCO Foresight-supplied HIPAA Guideline

If you don't know which HIPAA guideline corresponds with your spoke guideline, open your company guideline in EDISIM, choose **File | Properties**, and look at the Industry Identifier Code.

If it ends with A1: The guideline is based on the addenda. You can look up the corresponding HIPAA guideline name in **ForesightHIPAAguidelinelist.pdf** in the Doc directory. Look in the column for **Validator Guideline Addenda Types 1-6**. If you are planning to use the merged guideline with Docsplitter or Response Generator, use the **GuidelinePlus** column.

If it does not end with A1: The guideline is *not* based on the addenda. You can look up the corresponding HIPAA guideline name in **ForesightHIPAAguidelinelist.pdf** in the **Doc** directory. Look in the column for **Validator Guideline Types 1-6**.

You may want to write the HIPAA guideline name down, since you will be typing it into a batch file or dialog box.



## Performing a Guideline Merge

You can merge from:

- A dialog box ..... See page [7](#)
- A batch file ..... See page [11](#)

The batch file method offers more extensive options.


### Merging from a Dialog Box

You can merge your guidelines from within EDISIM Standards Editor or from a standalone program called **GM.exe**. Either method brings up the same dialog box.

Follow this procedure each time you are ready to merge two guidelines.

#### Setting up a Merge

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1. Collect the information mentioned in **Information Needed Before Merging** on page [6](#).
2. Open the GM dialog box by:
  - Opening EDISIM Standards Editor 5.14 or later and clicking the GuideMerge toolbar button  .
  - Or, by double-clicking on **GM.exe** in the **Bin** directory of EDISIM, HIPAA Validator Desktop, or Instream.
3. Choose **View | Options** and check the settings, which are described in the next section.


## Selecting Options

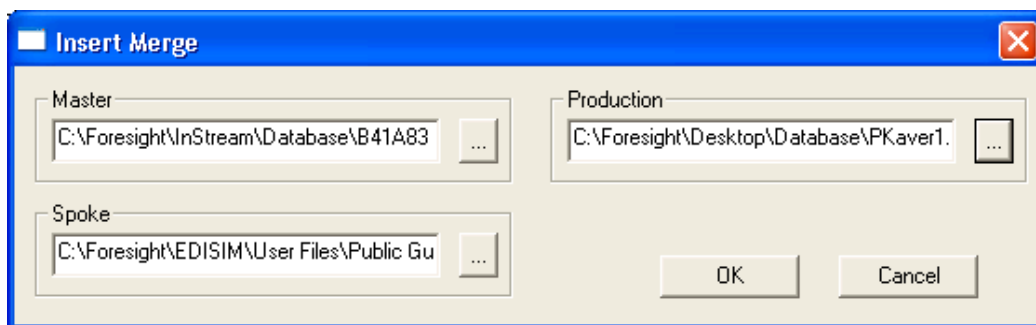
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From the GM dialog box, choose **View | Options** and select any options that you need:

<b>Show Debug Messages in Output</b>	If selected, this shows more information in the bottom of the merge dialog box.
<b>Overwrite Production Guideline During Merge</b>	<p>If selected, the production guideline is overwritten without prompting.</p> <p>If this is not selected, and the production guideline exists, the merge fails.</p>
<b>Use Description from Master guideline</b>	If selected, the master guideline descriptions will be used in the production guideline.
<b>Use Description from Spoke Guideline</b>	If selected, the spoke guideline descriptions will be used in the production guideline
<b>Use Custom Description</b>	If selected, you can type a description that will be used for the production guideline.
<b>Allow User Attribute Overrides</b>	<p><b>Allow User Attribute Overrides</b> lets you change default merging behavior for selected user attributes.</p> <p>If the selected user attribute is set in the <b>spoke</b> guideline, it is to be set the same way in the resulting production guideline.</p>
<b>Force User Attribute Overrides</b>	<p><b>Force User Attribute Overrides</b> lets you change default merging behavior for selected user attributes.</p> <p>If set in the <b>master</b> guideline, the selected <b>spoke</b> user attribute settings are to be used in the resulting production guideline.</p> <p><b>None</b> means the spoke guideline's user attributes <i>never</i> override those in the master guideline - even those objects that are marked must use in the spoke guideline.</p>

## Performing a Merge

1. Click the  button to add a merge to the box.
2. Fill out the three fields as follows (you can stretch the dialog box to make the fields wider).



**Master** Click the button at the end of the field and find the file containing the master guideline.




For HIPAA users, it is in HIPAA Validator Desktop's Database directory or Instream's Database directory. If it is not accessible to your current machine, copy its .STD file to a drive that is accessible.

**Spoke** Click the button at the end of the field and navigate to the file containing your company's guideline. This is normally in EDISIM's User Files\Public Guidelines directory.

**Production** Click the button at the end of the field and navigate to the directory where you want to create your production guideline. Type the name of your guideline.

3. Click **OK** to add the merge to the top window.



4. If you have other merges to do, add them by clicking .
5. Click the  button to perform the merge(s).  
If you have multiple merges listed, you can merge an individual line by clicking on it and then clicking .
6. Read the diagnostics in the bottom pane and then check to be sure that the production guideline was created.

### Changing a Merge

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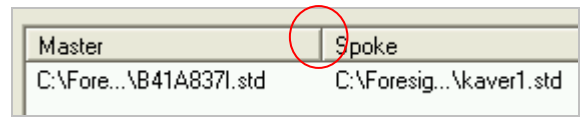
To change a merge listed in the top pane of the GM dialog box, double-click on it.

### Adjusting the GM Box

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You can stretch the dialog box horizontally by dragging the right and left edges out.




You can adjust the columns in the top window by dragging the splitters between the column headers:



### Saving Merge Definitions

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If you plan to repeat the merge when the spoke guideline or HIPAA guideline changes in the future, save it.

To do this ...	Do this ...
Save a merge definition	Click  , the Save toolbar button. Use file extension .gmp when naming the file.
Open a saved merge	Open the GM box and click  , the Open toolbar button. Select the previously saved .gmp file.
Add to a saved merge	Open it and click  .
Change a line in a saved merge	Open it and double-click on the line.

## Merging from the Command Line

### Set up a Batch File

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Set up a separate batch file for each spoke guideline that you want to merge. You can reuse them each time you need to re-merge.

1. Copy **GuidelineMergeSample.bat** to a name that describes the specific merge that you are creating.  
  
You can find it in Instream's Scripts directory or HIPAA Validator Desktop's DemoData directory.
2. Edit the newly-created batch file with a text editor (disable the editor's word wrap) as described in Guideline Merge Batch File Format below.
3. Close the batch file, EDISIM, and the validator.

### Guideline Merge Batch File Format

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The format is:

```
Path\GuideMerge.exe -m "d" -s "spokeguid" -p "prodguid" {options}  
> logfile
```

Where:

Parameter	Description
<i>Path</i> \GuideMerge.exe	Path to GuideMerge.exe. Example: c:\Foresight\EDISIM\Bin\GuideMerge.exe Required.
-m " <i>masterguid</i> "	The -m is literal text, followed by one space and the path and name of the master guideline. Example: -m "C:\Foresight\Desktop\Database\B41A837I.std" Optional but required if the production guideline doesn't exist or is not the result of a previous merge. If omitted, the production guideline is checked to see if it contains the identity of the master guideline used in the previous merge.

Parameter	Description
<b>-s "spokeguide"</b>	<p>The <b>-s</b> is literal text, followed by one space and the path and name of the spoke guideline created with EDISIM Standards Editor. This guideline is normally located in EDISIM's User Files\Public Guidelines directory.</p> <p>Example:</p> <pre>-s "C:\Foresight\EDISIM\User Files\Public Guidelines\BB837I.std"</pre> <p>Optional but required if the production guideline doesn't exist or is not the result of a previous merge.</p> <p>If omitted, the production guideline is checked to see if it contains the identity of the spoke guideline used in the previous merge</p>
<b>-p "prodguide"</b>	<p>The <b>-p</b> is literal text, followed by one space and the path and name of the production guideline that is to be created by the merge.</p> <p>Example:</p> <pre>-p "C:\Foresight\Desktop\Database\PBB837I.std"</pre> <p>Required.</p>
<b>-dc "xxx"</b>	<p>Use custom description "xxx" for the production guideline.</p> <p>Optional.</p> <p>Default is -dm.</p> <p>Example:</p> <pre>-dc "Kaver Corporation X12-4010 837P"</pre>
<b>-dm</b>	<p>Use the master guideline description for the production guideline.</p> <p><b>-dm</b> is the same as the former <b>-df</b> parameter, which will also work.</p> <p>Optional.</p> <p>This is the default.</p>
<b>-ds</b>	<p>Use the spoke guideline description for the production guideline.</p> <p><b>-ds</b> is the same as the former <b>-du</b> parameter, which will also work.</p> <p>Optional.</p> <p>Default is -dm.</p>
<b>-e</b>	<p>Encrypt the production guideline's STD file.</p> <p>Default is not encrypted unless at least one of the guidelines being merged is encrypted.</p> <p>Optional.</p>

Parameter	Description
<b>-ou "x"</b>	<p>User Attribute Override - specified user attributes that, if set in the master, will come from the spoke.</p> <p>x is a list of user attribute codes, including any or all of these:</p> <ul style="list-style-type: none"> <li>O      Optional</li> <li>M      Must Use</li> <li>N      Not used</li> <li>R      Recommended</li> <li>T      Not Recommended</li> <li>D      Dependent (Conditional)</li> </ul> <p>Example: <code>-ou "ROT"</code></p> <p>Optional.</p> <p>By default, all master settings are used except for spoke M, which prevails. If you don't want the spoke M to prevail, use <b>-ouf "x"</b>.</p>
<b>-ouf "x"</b>	<p>User Attribute Override - specified user attributes that, if set in the spoke, will always overwrite the master's settings.</p> <p>See the options list for -ou, plus:</p> <ul style="list-style-type: none"> <li>x      Turns off the <b>-ouf "M"</b> default. Do not combine it with other -ouf settings.</li> </ul>
<b>-o</b>	<p>Overwrite OK flag. If specified, no prompt is needed before overwriting the production guideline if it already exists.</p> <p>Optional.</p> <p>Default: Prompts before overwriting.</p>
<b>-rn</b>	<p>Excludes all rules and variables from the production guideline.</p> <p>Optional.</p> <p>Default: Merge rules from the master and spoke.</p>
<b>-rs</b>	<p>Put spoke rules before master rules in production guideline.</p> <p>Optional.</p> <p>Default is to put the spoke rules after the master rules.</p>

Parameter	Description
<b>-vn</b>	<p>This identifies the type of message you'd like to see for the merge operation.</p> <p>Output goes to the screen unless you pipe it to an output file by adding  <code>&gt; log.txt</code> or similar to the command line.</p> <p>The <b>-v</b> is literal text, followed by a digit representing one of these output verbosity levels:</p> <p>0 = No output  1 = Errors only  2 = Errors and warnings (default)  3 = Errors, warnings, and informational messages  9 = Debug level (lots of output!)</p> <p>Optional.  Default: 2</p>
<b>-w</b>	Optional Wait flag. If specified, GuideMerge prompts you to 'press any key' upon completion or cancellation.
<b>-x "xref_file"</b>	<p>Contact TIBCO Foresight before using parameter.</p> <p>The ordinal cross-reference file to use. This table matches up segments with different ordinal numbers, for example, when the master and spoke started out with different base guidelines or standards.</p> <p>The format of this file is one line per ordinal cross-reference. Each line contains the master ordinal, a space, and the spoke ordinal, like this:</p> <pre>10 14 14 15 19 20</pre>

### Example

```
c:\Foresight\EDISIM\Bin\GuideMerge.exe
-m "C:\Foresight\Desktop\Database\B41A837I.std"
-s "C:\Foresight\EDISIM\User Files\Public Guidelines\Kaver837I.std"
-p "C:\Foresight\Desktop\Database\PKaver837I.std" -v2 > Log.txt
```



## Execute the Batch File

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Double-click on the batch file to perform the merge. A command window shows progress. The window's heading indicates when the merge is finished:



Check the production guideline's directory for the new production guideline with the appropriate date and time. It is now merged and ready to test.

## Common Problems when Merging

- Attempted to merge different transaction sets (Example: 837P with 837I).
- Attempted to merge two different versions of the same guideline (Example: 5010 non-addenda with 5010 addenda).
- Guideline structure is different (loops and segments exist in one guideline but not the other, or have been rearranged).
- Failed to turn on overwrite option and the production guideline already exists.

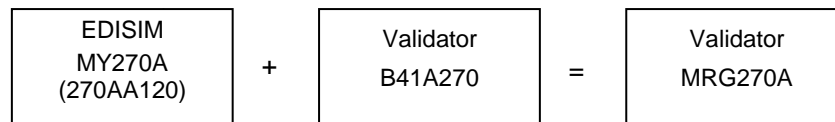
## Merging Strategies for HIPAA Guidelines

In this example, assume that we have these guidelines:

Guideline name	Types checked	Source
270AA120	Types 1 & 2	Ships with EDISIM Standards Editor
MY270A	Types 1, 2, & 7	You created with EDISIM Standards Editor
B41A270	Types 1 - 6	Ships with HIPAA Validator Desktop
MRG270A	Types 1 - 7 plus user changes	You create by merging. Use this when validating in Instream, Desktop, and TIBCO Foresight® Community Manager®.

To make a guideline containing your rules and HIPAA rules:

1. Make a new guideline in Standards Editor and base it in 270AA120. Add your rules and save it as MY270A.
2. To get your rules into HIPAA Validator Desktop or Instream, use GuideMerge to merge MY270A with B41A270, resulting in a merged production guideline that you call MRG270A. Save the merge definition so that you can use it again.
3. Use MRG270A with HIPAA Validator Desktop or Instream to enforce HIPAA rules and your own rules.



### Important Points

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- Keep your spoke guideline (MY270A in the example above). You will need it when you want to add new rules. You will also need it when you install updated HIPAA guidelines from TIBCO Foresight.
- Save the batch file or dialog box definition for future use.

### Maintenance

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If you install TIBCO Foresight's updates to HIPAA guidelines, you will want to get the updates in to your merged guideline MRG270A.

To do this:

1. Install the TIBCO Foresight guideline updates.
2. Re-execute your batch file to re-merge MY270A with B41A270.

### Changing or Adding to Your Own Rules

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1. Move MRG270A to another directory for backup.
2. Open your original rules guideline, MY270A, in Standards Editor and add more rules.
3. Re-execute your batch file to re-merge Merge MY270A with B41A270 to re-create MRG270A with the new rules.

**Caution:** If you no longer have MY270A (the guideline that you created), you will not be able to get new HIPAA changes and your own rules into a merged guideline.

## Guideline Merge Messages

Message Type: Sets	
Message	Meaning
Structural Difference(s) encountered in Set xxx – Master Set used.	The spoke guideline's set xxx has a different layout (additional, missing, or rearranged segments and/or loops) from the master guideline's set.
Set xxx not found in Spoke Guideline – Master Set used.	Set xxx was not found in the spoke guideline, but was found in the master guideline.
Set xxx MISSING from both Master and Spoke – Ignored!	Set xxx is missing from both the spoke and master guidelines. This is a rare message, and indicates an internal problem with one or both guideline files.
Seg/Loop Mismatch at line n: Master Seg/Loop = xxx vs. Spoke Seg/Loop = yyy	At line n, the master guideline has segment or loop xxx, while the spoke guideline has segment or loop yyy. Line n is a segment/loop counter, and is not the ordinal number. Line n would be the nth line on the Standards Reference screen with every loop expanded.
Seg/Loop ID Mismatch at line n: Master Seg/Loop = xxx vs. Spoke Seg/Loop = yyy	At line n, the master guideline has segment or loop with an ID of xxx, while the spoke guideline has segment or loop with an ID of yyy. Line n is a segment/loop counter, and is not the ordinal number. Line n would be the nth line on the Standards Reference screen with every loop expanded.
Seg/Loop Ordinal Mismatch at line n: Master Seg/Loop xxx = a vs. Spoke Seg/Loop yyy = b	Segment or loop xxx at line n in the spoke guideline has a different ordinal number from the corresponding segment (or loop) in the master guideline. This was probably caused by inserting and/or deleting segments and/or loops.

Message Type: Segment Dictionary	
Message	Meaning
Structural Difference(s) encountered in Segment dictionary item xxx – Master Set used.	The spoke guideline's segment xxx has a different layout (additional or missing elements and/or composites) from the master guideline's segment.
Warning: Segment xxx missing from Spoke Guideline; using Master copy.	This warning message indicates that segment xxx was not found in the spoke guideline.

Message Type: Segment Dictionary (CONTINUED)	
Message	Meaning
Seg xxx contains Element Ordinal Mismatch at position n: Master yyy = aaa vs. Spoke zzz = bbb	Element or composite yyy at position n in segment xxx in the spoke guideline has a different ordinal number from the corresponding element in the master guideline. This is probably the result of inserting and/or deleting elements and/or composites.
Seg xxx contains Element ID Mismatch at position n: Master Element/Composite = aaa vs. Spoke Element/Composite = bbb	The element (or composite) at position n in segment xxx in the spoke guideline has a different ID from the corresponding element in the master guideline.
Seg xxx Mismatch: Spoke version contains more/fewer members than Master.	Segment xxx in the spoke guideline has a different number of elements and/or composites from the corresponding segment in the master guideline.

Message Type: Composite Dictionary	
Message	Meaning
Structural Difference(s) encountered in Composite dictionary item xxx – Master Set used.	The spoke guideline's composite xxx has a different layout (additional or missing elements and/or composites) from the master guideline's composite.
Warning: Composite xxx missing from Spoke Guideline; using Master copy.	This warning message indicates that composite xxx was not found in the spoke guideline.
Seg xxx contains Element Ordinal Mismatch at position n: Master yyy = aaa vs. Spoke zzz = bbb	Element yyy at position n in composite xxx in the spoke guideline has a different ordinal number from the corresponding element in the master guideline. This is probably the result of inserting and/or deleting elements.
Seg xxx contains Element ID Mismatch at position n: Master Element/Composite = aaa vs. Spoke Element/Composite = bbb	The element at position n in composite xxx in the spoke guideline has a different ID from the corresponding element in the master guideline.
Seg xxx Mismatch: Spoke version contains more/fewer member than Master.	Composite xxx in the spoke guideline has a different number of elements from the corresponding composite in the master guideline.

Message Type: Element Dictionary	
Message	Meaning
Structural Difference(s) encountered in Element dictionary item xxx – Master Set used.	The spoke guideline's element xxx has a different type from the corresponding master guideline's element.
Warning: Element xxx missing from Spoke Guideline; using Master copy.	A warning message indicating that element xxx was not found in the spoke guideline.
Element Type mismatch: Master Element xxx = 'aa' vs. Spoke Element yyy = 'bb'.	Element xxx in the spoke guideline has a type of bb, while the corresponding element in the master guideline has a type of aa.

Message Type: Application Value Lists	
Message	Meaning
Spoke Appl List xxx will be changed to yyy, since name is already used in Master Guideline.	This informative message indicates that Guideline Merge has changed the name of a spoke's application value list from xxx to yyy. This was done because the name xxx was already being used in the master guideline. To create a new name, Guideline Merge takes the original name xxx and appends the letter u followed by a two-digit number. This number will start at 01 and be incremented by one until a unique name is created. For example, the list name MyList could be turned into MyListu01. Business rules that refer to the list are updated accordingly.
Changing Appl List Reference xxx to yyy for Key 'zzz'	This informative message indicates that application value list name xxx was changed to its new name of yyy in the Set/Seg/Element key zzz. (See the previous message regarding renaming of application value lists.) Business rules that refer to the list are updated accordingly.

Message Type: Local Variables	
Message	Meaning
Spoke Variable xxx will be changed to yyy, which is already attached to Key zzz in Master Guideline.	This informative message indicates that the name of a spoke's local variable has been changed from xxx to yyy. This was done because a master variable named yyy was already attached to the element. Business rules that refer to the variable are updated accordingly.
Spoke Variable xxx will be changed to yyy, since name is already used in Master Guideline.	This informative message indicates that the name of a spoke variable has been changed from xxx to yyy. This was done because the name xxx was already being used in the master guideline. The new name will be the original name xxx plus the letter <b>u</b> followed by a two-digit number. This two-digit number will start at 01 and be incremented by one until a unique name is created. For example, the variable name <b>MyVar</b> might be changed to <b>MyVaru01</b> . Business rules that refer to the variable are updated accordingly.

Message Type: Business Rules	
Message	Meaning
Changing Variable xxx to yyy in Rule <i>n</i> for Key 'zzz'	This informative message indicates that a reference to variable xxx was changed to its new name yyy in the nth business rule attached to the Seg/Seg/Element key zzz.
Changing Appl List Name xxx to yyy in Rule <i>n</i> for Key 'zzz'	This informative message indicates that a reference to an application value list name xxx was changed to its new name yyy in the nth business rule attached to the Seg/Seg/Element key zzz.