

TIBCO Foresight® EDISIM®

DocStarter: Creating a Guideline from EDI Data

Version 6.20.0

May 2021



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Capabilities

Customized guidelines (also called MIGs in EDIFACT) are typically created with TIBCO Foresight® EDISIM®'s Standards Editor, using an existing guideline as a base. EDISIM® also provides the capability to create a custom guideline from EDI data. This tool is called **DocStarter**.

A guideline created with DocStarter can be used with any EDISIM module, just as if you had created it with Standards Editor. This includes:

- printing formatted documentation
- viewing guideline information on-screen
- analyzing data
- creating test data
- using it with other TIBCO Foresight products like TIBCO Foresight® Community Manager® or any of the specialty HIPAA products.

Two Versions of DocStarter

EDISIM currently supports two versions of DocStarter:

- DocStarter for X12, EDIFACT, and HL7, which uses the Validator component
- Legacy DocStarter for X12 or EDIFACT, which uses the Analyzer component and will be deprecated in future versions of EDISIM.

Both versions work the same way, but the resulting collection files are incompatible. You cannot add data to a collection file using Validator if the collection file was originally created by Analyzer, and vice-versa.

Skills Required

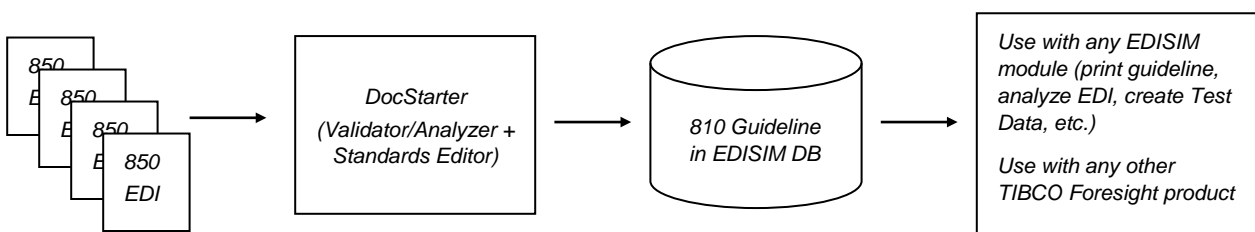
DocStarter requires that you:

- use EDISIM's Validator or Analyzer
- perform simple operations in EDISIM's Standards Editor.

Input and Output

An EDI file can contain one or more transactions or messages. Within each file, you can use any or all transactions or messages to build the guideline.

The resulting guideline will contain one or more transaction sets or messages, with segments, elements, and codes that are customized to match the data in the EDI file.



The guideline will be as complete and accurate as possible, based on the EDI data files. However, you will probably want to refine it by editing it with Standards Editor, or by using DocStarter with more EDI files as you get them.

Tips

The more data files you have, the better your guideline will be.

In general, you will want to use only error-free EDI data to create your guideline.

DocStarter Steps

To create a guideline from EDI data, you will use:

- **Validator** or **Analyzer** - to check the data before using it.
- **Standards Editor** - to import and modify the new guideline.
- **Document Builder** or **other EDISIM module** - to use the guideline.

These steps are described in the following sections:

1. Analyze the EDI File [4](#)
2. Create a Collection File [5](#)
3. Import the Collection into Standards Editor [7](#)
4. Edit a DocStarter Guideline [8](#)
5. Use the Guideline [9](#)

Analyze the EDI File

The first step in creating a guideline from EDI data is to analyze the file – usually against a published standard.

1. From within Validator or Analyzer, choose **File | Open** and select the file that contains EDI data. Click **Open** in the File Open dialog box.
2. From the **Select Standard** dialog box, choose a published X12, EDIFACT, or HL7 standard or an industry guideline that ships with EDISIM. This will be the base standard for the guideline that you are creating. Normally, this would be the standard specified within the EDI files. Select the check box for **Use for all Occurrences of xxxx**.
3. Click **OK** to start the analysis.
4. When the analysis completes, view the diagnostics. If they appear to be what you want, create a collection file as described below. Generally, you only want to use good EDI data to start a guideline.

Create a Collection File

The next step in creating a guideline from EDI data is to create a collection file for import into Standards Editor.

A collection consists of either:

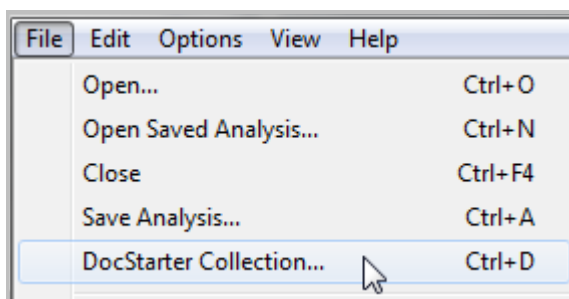
One file (.COLX) when using Validator

or

Three files (.COL, .IDX, and .TXN) when using Analyzer.

You may choose to save them to EDISIM's TEMP folder or another location where they will be easy to find and delete.

1. Review the DocStarter collection options in Step 3. Validator DocStarter supports the **Entire Input File** option only. If you are using Analyzer DocStarter and are using only part of the EDI file to create the guideline, click on the appropriate segment in Analyzer's bottom pane: interchange header, group header, or transaction set or message header.
2. Choose **File | DocStarter Collection**.



3. From the DocStarter Collection dialog box, choose one of the options listed and click **OK**.



Options

Entire Input File: Collect information from all interchanges. This is the default if you do not select a specific interchange header, functional group header, or transaction set or message header segment. Default: On.

Interchange: (Analyzer DocStarter only) Collect information from the current interchange only. You must have clicked on a segment in that interchange in Analyzer's **Segment** pane. Default: Off.

Functional Group: (Analyzer DocStarter only) Collect information from the current functional group, which can contain one or more transactions. You must have clicked on a segment in that functional group in Analyzer's **Segment** pane. This option is faded if the currently selected segment is not part of a functional group (for example, for EDIFACT files with no UNG). Default: Off.

Transaction Set or Message: (Analyzer DocStarter only) Collect information from the current transaction set or message. You must have clicked on a segment in that transaction set or message in Analyzer's **Segment** pane. Default: Off.

4. Choose a file name and folder. To start a new collection, enter a filename with file type **.col**.

To add to an existing collection, select the SAME .COL/.COLX file and click **Save**. Data from this analysis will be added to the existing file.

Note that:

- Collection files are specific to the tool you are using (Validator or Analyzer). For example, you cannot add to a collection file that was originally created by Analyzer DocStarter with new data created by Validator DocStarter.
- A collection can have one guideline only. You cannot mix guidelines within a collection file.

5. Wait until you see **Collection Complete** and then click **Close**.

Adding to your collection

It is to your advantage to collect from many data files. This gives EDISIM more data from which to build a better guideline.

To add another file, repeat the process outlined above, analyzing other EDI files against the same published standard, and adding the results to the same collection file.

Important: Be sure to add the results to the same .COL/.COLX file.

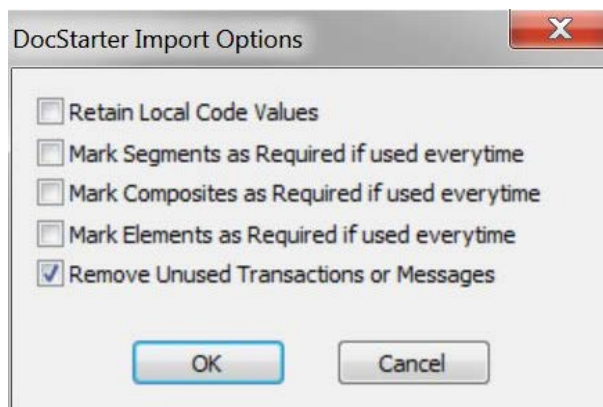
When finished collecting data from the EDI files, import the collection into Standards Editor.

Import the Collection into Standards Editor

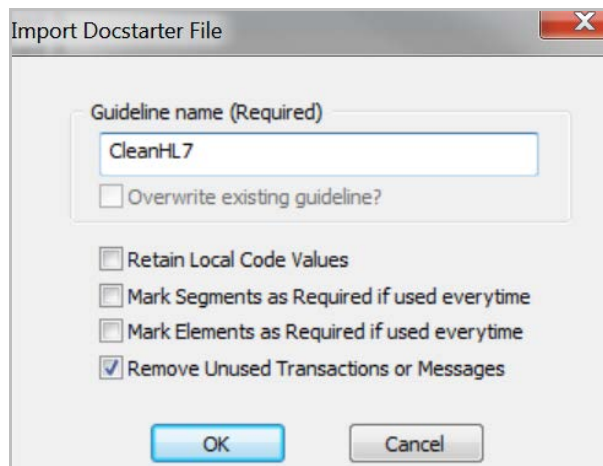
The next step in creating a guideline from EDI data is to import the collection into Standards Editor.

1. Open Standards Editor.
2. Choose **File | Import | Import DocStarter File**.
3. Locate and select the collection (.col/.colx) file created by Validator/Analyzer and click **Open**.
4. Choose the appropriate DocStarter options from the dialog box.

Validator DocStarter options:



Analyzer DocStarter options:



Options

Guideline name (Required) (Analyzer DocStarter Only)

Overwrite existing guideline? (Analyzer DocStarter Only)

Retain Local CodeValues – When selected, any codes that are not recognized by the underlying standard are stored as local codes in the transaction set or message. If this option is not selected, such codes are ignored. Default: Off.

Mark Segments as Required if used everytime – When selected, DocStarter marks segments as required if the EDI file always includes them. This is most useful if the COL/COLX file contains data from many EDI files. Default: Off.

Mark Composites as Required if used everytime (Validator DocStarter Only) – When selected, DocStarter marks composites required if the EDI file always includes them. This is most useful if the COL/COLX file contains data from many EDI files. Default: Off.

Mark Elements as Required if used everytime – When selected, DocStarter marks elements required if the EDI file always includes them. This is most useful if the COL/COLX file contains data from many EDI files. Default: Off.

Remove Unused Transactions or Messages – When selected, DocStarter only includes Transactions or Messages that it finds in the EDI data. We recommend selecting this option if you are analyzing against a published standard. For example, if the EDI data contains a purchase order and an invoice, and you compare to a published standard version that contains hundreds of documents, only a purchase order and an invoice are included in the resulting guideline. Default: On.

5. Use **File | Save As** to save the new guideline.
6. Enter a standard name, make changes to the description if desired, choose your envelope options from the Properties button, and click **OK**.

After importing, you can delete the COL/COLX, IDX, and TXT files unless you will be acquiring more EDI files for the collection.

Edit a DocStarter Guideline

After you have created and saved a new guideline from EDI data, you may receive more EDI files that can help you fine-tune the guideline. You can add to the original collection file, using the same published standard for analysis, and then re-import it into Standards Editor, creating a new guideline. You can then delete the first guideline, if desired.

If you no longer have the collection file, or if you have invested substantial time in modifying the guideline, this may not be practical. In that case, you may wish to make a new collection and create a second guideline, then use EDISIM's Comparator component to merge the code sets and determine which additional segments and elements have been used.

Use the Guideline

Now that you have cleaned up the guideline, you can use it in any EDISIM module, as well as with other TIBCO Foresight products.

For example, to print a formatted document:

1. Open DocBuilder and choose **File | Open Standard**.
2. Choose the guideline that you created from the EDI data.
3. Select the transaction set/message and click “OK”.
4. After DocBuilder generates the documentation, you can print it.

For additional information **see the following documents**, located in EDISIM's Documentation directory.

- TIB_fsp_edisim_<n.n>_fsanalyze.pdf
- TIB_fsp_edisim_<n.n>_fscompar.pdf
- TIB_fsp_edisim_<n.n>_fsdocbld.pdf
- TIB_fsp_edisim_<n.n>_fseditor.pdf
- TIB_fsp_edisim_<n.n>_fsvalidator.pdf

TIBCO Documentation and Support Services

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the TIBCO Product Documentation website, mainly in HTML and PDF formats.

The TIBCO Product Documentation website is updated frequently and is more current than any other documentation included with the product. To access the latest documentation, visit <https://docs.tibco.com>.

Product-Specific Documentation

Documentation for TIBCO® Foresight® EDISIM® is available on the [TIBCO Foresight® EDISIM® Documentation page](#).

The following documents for this product can be found on the TIBCO Documentation site:

- *TIBCO Foresight® EDISIM® Release Notes*
- *TIBCO Foresight® EDISIM® Data Types*
- *TIBCO Foresight® EDISIM® Documentation and Demo Data Index*
- *TIBCO Foresight® EDISIM® Supported File Formats*
- *TIBCO Foresight® EDISIM® Installation Guide*
- *TIBCO Foresight® EDISIM® Introduction to EDISIM®*
- *TIBCO Foresight® EDISIM® DocStarter: Creating a Guideline from EDI Data*
- *TIBCO Foresight® EDISIM® Guideline Merge*
- *TIBCO Foresight® EDISIM® Document Builder User's Guide*
- *TIBCO Foresight® EDISIM® Error Message Numbers, Editing, and Management*
- *TIBCO Foresight® EDISIM® Validator User's Guide*
- *TIBCO Foresight® EDISIM® Using Flat Files*
- *TIBCO Foresight® EDISIM® Library User's Guide*
- *TIBCO Foresight® EDISIM® Validation Profile Files (APF)*
- *TIBCO Foresight® EDISIM® Using XML*
- *TIBCO Foresight® EDISIM® Comparator User's Guide*
- *TIBCO Foresight® EDISIM® Analyzer User's Guide*
- *TIBCO Foresight® EDISIM® Standards and Guidelines Reference Manual*
- *TIBCO Foresight® EDISIM® Test Data Generator User's Guide*
- *TIBCO Foresight® EDISIM® Self-Paced Tutorial: Introduction to EDISIM® (X12 Standards)*
- *TIBCO Foresight® EDISIM® Self-Paced Tutorial: Introduction to EDISIM® EDIFACT D99A Orders*
- *TIBCO Foresight® EDISIM® Standards Editor User's Guide*
- *TIBCO Foresight® EDISIM® Business Rules*

How to Contact TIBCO Support

You can contact TIBCO Support in the following ways:

- For an overview of TIBCO Support, visit <http://www.tibco.com/services/support>.
- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the TIBCO Support portal at <https://support.tibco.com>.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to <https://support.tibco.com>. If you do not have a user name, you can request one by clicking Register on the website.

How to Join TIBCO Community

TIBCO Community is the official channel for TIBCO customers, partners, and employee subject matter experts to share and access their collective experience. TIBCO Community offers access to Q&A forums, product wikis, and best practices. It also offers access to extensions, adapters, solution accelerators, and tools that extend and enable customers to gain full value from TIBCO products. In addition, users can submit and vote on feature requests from within the [TIBCO Ideas Portal](#). For a free registration, go to <https://community.tibco.com>

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