TIBCO Foresight® EDISIM®

Document Builder User's Guide

Version 6.20.0

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Contents

1 Introduction

Where Doc Builder Fits

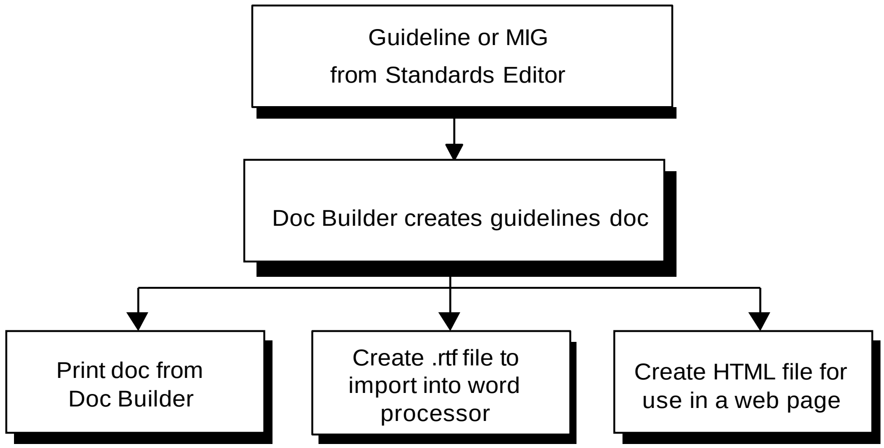
Document Builder is the part of TIBCO Foresight® EDISIM® that automatically generates guideline or MIG documents for your company to use internally or to share with trading partners.

You can base the document on these items that you developed with Standards Editor:

- Any EDI guideline or MIG developed with Standards Editor.
- Any flat file guideline
- Any XML guideline

Output can be in these formats:

- Printed
- RTF file (that can be opened by a word processor)
- HTML


Guideline or MIG
from Standards Editor
Doc Builder creates guidelines doc
Print doc from
Doc Builder
Create .rtf file to
import into word
processor
Create HTML file for
use in a web page

How to Run Doc Builder

There are several ways to start Doc Builder.

- If using the EDISIM Application Manager, click the **Document Builder** icon: 
- Otherwise, choose **Start | Programs |** ***<TIBCO_HOME>*** **| EDISIM | Document Builder**.
- (Standalone installation only) Double-click on file **FSDocbld.exe** from Windows Explorer. By default, this is in EDISIM's **Bin** folder.
- (Network workstation installation only) Double-click on the Document Builder shortcut from Windows Explorer. This is in EDISIM's high-level folder on your local drive.

Navigating Menus and Screens

Doc Builder uses typical Microsoft Windows navigational techniques.

Keyboard Use

Alt+key	To choose something, hold down *Alt* and press the underlined key.
Esc	To cancel the selection, press *Esc*.
Space Bar	To cancel the current processing (e.g., generating guidelines or MIGs), press the *Space Bar*.
Enter	To execute the selected choices (often acts as an **OK**), press *Enter*.
Tab	To move to the next area in a dialog box, press *Tab*.
Shift+Tab	To move to the previous area in a dialog box, press *Shift+Tab*.
Arrow Keys	To move between radio buttons within an area in a dialog box, press the *up, down, right, or left arrow key*.

2 Doc Builder Details

Choosing a Guideline or MIG

To open a guideline:

- File Open Standard... Displays the Open Standard dialog box, where you can select a guideline or MIG.
- File | <bottom of menu> The last guidelines or MIGs opened will appear at the bottom of the File menu. You can click on one as a quick way to open it and then go to the Transaction Set/Message Selection dialog box.
- The open file button  on the toolbar is equivalent to **File | Open Standard**.

When you open a guideline or MIG, any previously opened one automatically closes.

If the Guideline or MIG is not in the Open Standard Dialog box

Where was it developed? If it was developed elsewhere, it can be exported from another Standards Editor and then imported into the Standards Editor on this PC.

If the list is empty even though you have guidelines or MIGs created with Standards Editor, please contact TIBCO Foresight Technical Support.

Choosing a Transaction Set or Message

There are two ways to choose a transaction set or message:

- Immediately after opening a guideline or MIG

  After choosing a guideline or MIG from the bottom of the File menu or from the Open Standard dialog box, you automatically go to the Transaction Set/Message Selection dialog box. (The menu path was **File | Open Standard**, choose a guideline or MIG from the Open Standard dialog box, and then see the Transaction Set/Message Selection dialog box.)

- At any time

  If you have a guideline or MIG open, you can use **File | Generate Guidelines** to choose any transaction set or message that it contains. You can also use this path to generate an export (RTF) file after viewing or printing.

Either path brings up the Transaction Set/Message Selection dialog box.

Using the Transaction Set/Message Selection Dialog Box

You need to provide answers to the following questions when using the Transaction Set/Message Selection dialog box:

- What transaction or message do you want to use? Select it with a single click.
- What do you plan to do with it? The buttons at the bottom show your choices: View/Print or Export (to RTF).
- What profile do you wish to use? (Optional) The Profile button takes you to the Doc Builder Options dialog box (see Customizing your Document with a Profile on page 13).

If you are going to use a Profile other than the one that is currently in effect, use the Profile button to select it before closing the Transaction Set/Message Selection dialog box.

Doc Builder defaults include: .5" margins on the top and bottom, 1" margins on the left and right sides, portrait orientation 8 ½" by 11" paper, no header, and a footer that includes name of the guideline or MIG, page number, and current date.

Closing the Transaction Set/Message Selection Dialog Box

Before closing this dialog box, select the transaction or message of your choice, choose one of the buttons at the bottom, and then click **OK**.

Shortcut: If the buttons are already set correctly, double-click on the transaction or message to select it and close the dialog box. If you had another document open, it automatically closes.

If you chose Export, you will see the **Export Guidelines As** dialog box (see Exporting to RTF on page 45).

If you selected View/Print, you will see the **Generating Guidelines** box, which shows the progress of your generation. You will soon view the document on-line as described in Viewing a Document on the Screen below.

Viewing a Document on the Screen

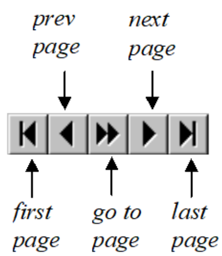
After opening a guideline or MIG, and then choosing a transaction set or message for View/Print, your document will appear on the screen.

To see the rest of the Current Page

Use the scroll bar, *Page Down* key, or cursor arrow keys. If the entire page is already showing, there is no scroll bar and the cursor arrow keys have no effect.

To see other Pages

Use the toolbar at the top. Display the toolbar by selecting **View |Toolbar**.



Or use keystrokes:

Ctrl+rightarrow	next page
Ctrl+ leftarrow	prev page
Ctrl+Home	first page
Ctrl+End	last page
*Ctrl+***g**	go to page *n*

Editing the Guideline or MIG

You cannot edit a document from within Doc Builder, but you do have some control over its content and appearance:

- You can customize the profile (see Customizing your Document with a Profile on page 13).
- You can change your guideline or MIG with Standards Editor.
- For post-generation editing, you can export to an .RTF file and import your document into a Windows word processor. **Caution**: Changes to RTF files do not show up in EDISIM.

What you see on the Screen in Normal View

Under Doc Builder's normal view, you will not see headers, footers, or margins on the screen. To see them, use **File | Print Preview**.

If you change settings under, you need to regenerate so that your changes take effect. You can do this in two ways: answer *Yes* to the question about regenerating, or choose **File | Generate Guidelines**.

Toolbar and Status Bar

Toolbar buttons include:

File | Open Standard. Let's you select a guideline or MIG.

File | Close Standard. Closes the current guideline or MIG. Doc Builder remains open.

File | Print. Displays the Print dialog box.

File | Print Preview. Displays the document as it will print, including headers and footers.

File | Generate Guidelines. Displays the list of transactions or messages in the current guideline or MIG, so that you can select one to view or export.

Profile | Options. Displays the Doc Builder Options dialog box.

View | First Page

View | Prior Page

View | Goto Page

View | Next Page

View | Last Page

Opens Analyzer.

Opens Comparator.

Opens Test Data Generator (TDG).

Opens Help.

Closes Doc Builder.

Toolbar help

To see a brief explanation of what a button will do, rest your mouse cursor on it.

For a more complete explanation, hold the left mouse button down, and read the description on the status bar at the bottom. If you do not wish to execute the button, drag the mouse cursor off the button *before* releasing.

Displaying the Toolbar and Status Bar

By default, the toolbar and status bar (at the bottom of the screen) are both visible. To hide them, click on the **View** menu. **Toolbar** and **Status Bar** will have check marks next to them if they are displayed. You can toggle the check mark with a mouse click.

Print Preview

Before printing or exporting a document to RTF, you may want to use **File | Print Preview to** see the document as it will appear when printed - including headers, footers, and margins.

Zooming
You can view one or two pages at once (use the One Page or Two Page buttons toolbar button). You can also zoom to three different magnifications. Before zooming, place the mouse cursor (an arrow if fully zoomed in, a magnifying glass otherwise) in the area that you wish to view. Then click repeatedly to cycle through the three levels of magnification. The Zoom In and Zoom Out buttons at the top do the same thing.

Changing Pages
To change pages, use the **Next Page** or **Prev Page** buttons at the top of the screen. If the entire page is showing, the scroll bar moves through the document. If a partial page is showing, the scroll bar moves within the page.

Printing
The Print button lets you go directly to the Print dialog box (this is the same as using **File | Print** when not in preview mode). Please see Printing from Doc Builder below.

Close
Exits Print Preview and returns to normal view.

Troubleshooting

If print preview does not show your document, the currently selected printer may not support it. This could be true for a generic text printer or a fax, for example. Please see Printing from Doc Builder below for details about selecting a printer.

Printing from Doc Builder

Printing Tips

Tips for printing a professional-quality document of the transaction or message you are currently viewing:

- Check the status bar at the bottom for the number of pages.
- Consider using **File | Print Preview** before printing.

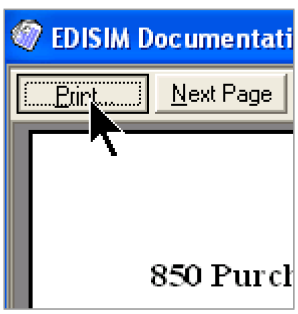
- If you need to make changes to the text, do not print from Doc Builder. Instead:

Structural changes	(EDI information is incorrect: wrong code, element should be unused, etc.) Use Standards Editor to correct the guideline or MIG, then bring it back into Doc Builder.
Cosmetic changes	Check **Profile | Options** to see if you can make the changes there. If not, export the document to an RTF format, then edit and print it with a word processing program. **Caution**: Changes in RTF files do not show up in EDISIM.

Opening the Print Dialog

You can open Doc Builder's Print dialog box in these ways:

- **File | Print**
- **File | Print Preview | Print button**



- **Toolbar print button**

Important! If you change orientation or paper, be sure **Profile | Page Setup** is set the same (see Customizing your Document with a Profile on page 13).

If Shading Does Not Print

Check **Profile | Options | Shading**. Is shading selected?

If so, check **File | Print Setup | Properties**. This dialog box varies, but look for Dithering, Halftoning, or other settings related to shading.

Finally, is your printer capable of shading?

Printing to A4 Paper

1. Choose **File | Print Setup** and set the paper size to A4. Select Paper Source and set it to the paper tray that holds A4 paper. If your printer does not have an A4 tray, choose the multi-purpose tray (the one that you probably use for letterhead) and adjust the tray's paper holding guides to fit. You will probably want to avoid manual feed. Exit this dialog box.

2. Choose **Profile | Options** and set the bottom margin to .25.

3. Generate the document and use **File | Print Preview** to check the formatting.

4. Use the Print button from Print Preview, or choose **File | Print** to print a few pages of the document. Check them, then print the rest.

If your printer refuses to believe that A4 paper is in the multi-purpose tray, you may have to use the options available on the printer's buttons to encourage it to print anyway. For example, on a HP 4, this would be accomplished by holding down the **Shift** button and pressing **Continue**.

Printing Code Values

To save space, an element's codes do not print if they are the same as those in the underlying standard. Instead, you will see the message "Refer to____Data Element Dictionary for acceptable code values." You have control over this, as follows:

To print all codes for an element, make them into a code set in Standards Editor. To do this, go into Standards Editor, highlight the element in the transaction set or message (not the dictionary), choose **Edit | Code Values**, and change the list or press the **Mark All Used** button. The Code Sets areas of the Standards Editor manual gives details.

To stop printing codes that are already printing, go into Standards Editor, highlight the element, choose **Edit | Code Sets**, and detach the code set from that location. Dictionary codes will return, but they do not print.

Options involving codes: You have several choices about printing code values under **Profile | Options | Element Items**.

Customizing your Document with a Profile

A profile defines printing and export options for the current session. For efficiency, set the profile before you select a transaction set or message.

You can enter the dialog boxes where you set a profile in these ways:

- Choose **File | Open |** *choose a guideline* **| Profile**.
- Choose **Profile | Options**.
- Use the toolbar button.

If you change the profile of a transaction set or message that is already open, you can see the new formatting by answering Yes to the question about regenerating, or by selecting:

File | Generate Guidelines
Lets you re-select a transaction set or message and then choose whether to **View/Print** or **Export**.

File | Re-generate Current
Refreshes display of the current transaction set or message to include the latest profile changes.

Profile menu choices	
Menu item	**Description**
Profile | Open…	Lets you choose a previously saved profile.
Profile | Save	Re-saves the current profile to a file.
Profile | Save As…	Saves the current profile to a filename of your choice.
Profile | Page Setup...	Lets you choose paper size and orientation. These should match the settings under **File | Print Setup**.
Profile | Options	Displays the Doc Builder Options dialog box, which lets you set margins, headers, footers, fonts, text, and optional items to print. See Doc Builder Options below for details.

Doc Builder Options

To see the multi-tabbed Doc Builder Options box, choose **Profile | Options** or use the **Profile** button in the Transaction Set/Message Selection box.

For details about profile options with XML guidelines, please see **XMLatForesight.pdf**.

Default Options:

- Top and Bottom margins set at .5".
- Left and Right margins set at 1".
- No header.
- Left Footer and Right Footer fields are blank in the Doc Builder Options box. However, if you do not enter your own footer information, Doc Builder creates a footer that includes the name of the guideline or MIG, page number, and today's date.

All notes, unused elements, and unused segments print by default.

Saving and Reusing Profiles

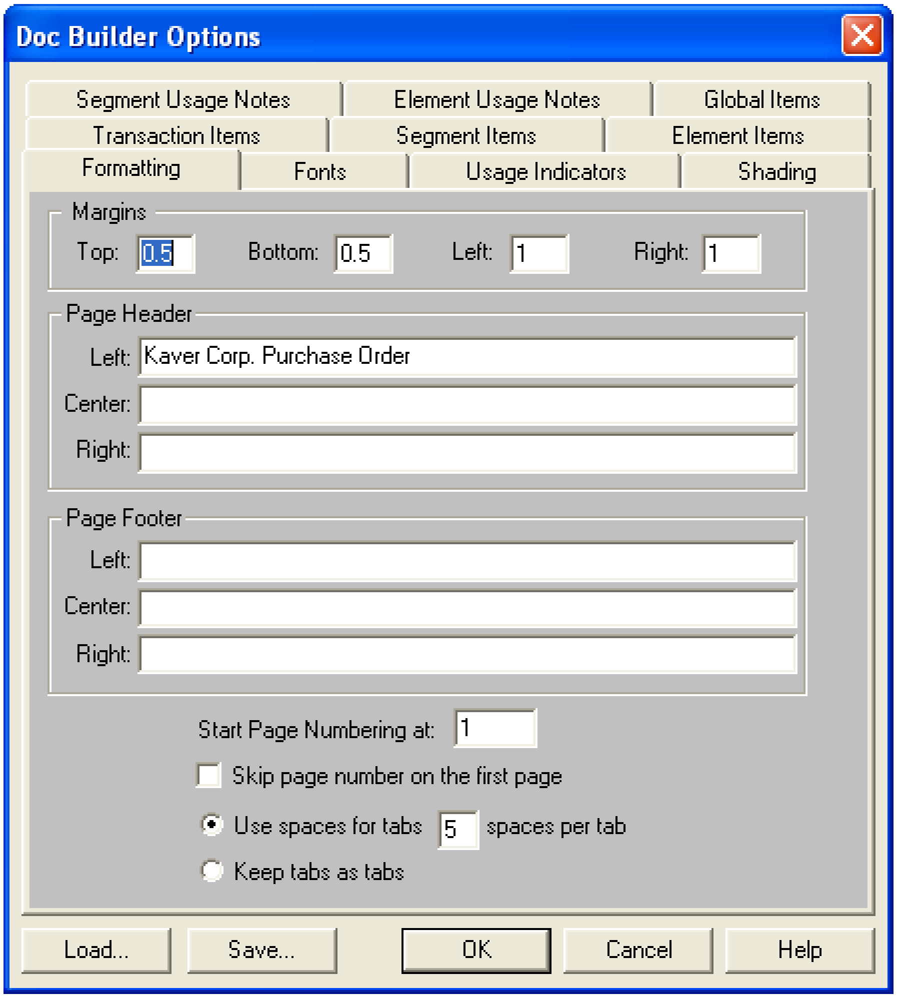
All tabs have these choices, which let you save profiles for use later.

Load	Lets you retrieve a previously saved profile. This is equal to **Profile | Open**.
Save	Lets you choose a file name and folder in which to save the current profile. You can then retrieve it later and use it for other documents via the Open button in this dialog box. This is equal to Save or Save As on the Profile menu.

Your own default profile: The bottom of the Save As box contains a check box for "Save as the Default Profile for Doc Builder." Select this to save your own default profile that will automatically load each time you start Doc Builder. You can save it to the folder of your choice.

Formatting Tab

General formatting options are under **Profile | Options | Formatting**.



Margins

Margin measurements are specified in inches. If you change these, use Print Preview to be sure that the information still fits properly. The footer goes above the bottom margin and the header goes below the top margin.

Page Headers and Footers

Defaults

The default footers do not appear in the Doc Builder Options box.

Page Headers	Doc Builder does not provide default page headers, but you can add them here.

Left Footer The default left footer is the name of the guideline or MIG, followed by the underlying base standard enclosed in parentheses.

Center The default center footer is the page number.

Right Footer The default right footer is today's date.

Customizing headers and footers

By customizing any of the three fields under Page Header, you are in charge of all three, and Doc Builder will not print any default page header information. Likewise, if you customize any of the three Page Footer fields, you are in charge of all three.

In page header or footers fields, you can type literal text and/or one or more of these control words, which will be replaced with the appropriate value as the document is printed:

Control word	Explanation	Example in profile	Example in printed doc
[PAGE]	Page Number	`Page [PAGE]`	`Page 5`
[PAGES]	Number of pages in document	`Page [PAGE] of [PAGES]`	`Page 5 of 45`
[DATE]	Date (*month day, yyyy*)	`[DATE]`	`September 4, 2008`
[DATE:*code*]	To change the date format, include a colon and one or more of the following codes within the square brackets. These codes can be combined. Example: [DATE:/2] produces a date in the format MM/DD/YY.		
	2 Two digit year (default = 4)	`[DATE:2]`	`September 4, 08`
	0 Leading zeroes (default = no leading zeros) Use with / or – (see below)	`[DATE:/0]` `[DATE:-0]`	`09/04/2008` `09-04-2008`
	/ m/d/y format	`[DATE:/]`	`9/4/2008`
	- m-d-y format	`[DATE:-]`	`9-4-2008`
	S Short Month Names (default = long month names)	`[DATE:S]`	`Sep 4, 2008`
	D Day first (d mmm yyyy or DD/MM/YYYY)	`[DATE:D]`	`4 September 2008`

Control word	Explanation		Example in profile	Example in printed doc
[TIME]	Time (HH:MM:SSA)		[TIME]	1:58PM
[TIME:*code*]	To change the time format, include a colon and one or more of the following codes within the square brackets. These codes can be combined. Example: [TIME:0M] produces a date in the format 01:58PM.			
	S	Seconds (default = no)	`[TIME:S]`	`1:58:16PM`
	0	Leading zeros on hour (default = no leading zeros)	`[TIME:0]`	`01:58PM`
	2	24-hour time (no AM/PM) (default = 12 hour time)	`[TIME:2]`	`13:58`
	a	a/p suffix	`[TIME:a]`	`1:58p`
	A	A/P suffix	`[TIME:A]`	`1:58P`
	m	am/pm suffix	`[TIME:m]`	`1:58pm`
	M	AM/PM suffix (default)	`[TIME:M]`	`1:58PM`
	N	No suffix (to override default 'M')	`[TIME:N]`	`1:58`
[FILENAME]	Name of standard file			Our810.std
[STDNAME]	Standard Name			Our810
[STDVER]	Standard Version			004010
[SETID]	Set/Message ID			810
[SETNAME]	Set/Message Name			Invoice
[SETFG]	Set/Message Functional Group Code			IN

These can be used in any header and footer fields and can be combined with each other and with literal text.

Example:

`[STDNAME] ([STDVER])` *Result:* `Our810 (00401)`

Page Numbers

Start Page Numbering By default, page numbering starts at 1. You may want to change this if you are adding other pages to this document.

Skip page number on the first page By default, you will get a page number in the center of page 1's footer. You can suppress it by selecting this option.

Tabs in Text

Use spaces for tabs or **Keep tabs as tabs** determine what happens to tab characters in text fields like notes and purposes. Click on the radio button of your choice.

Use spaces for tabs Tab characters are converted into the specified number of spaces. This does not assure alignment of columns. This setting works for on-screen, printed, RTF, and HTML output.

Keep tabs as tabs For on-screen, printed, and RTF output, tab characters advance to the next tab stop, which are preset in Doc Builder at 1/3-inch intervals from the left edge of the page. This gives you the ability to align columns. For HTML output, this setting causes tabs to be converted into four non-breaking spaces.

Tab examples

Use 5 spaces for tabs:

```
Notes:      1     2     3
            4     5     6
            seven     eight     nine
```

Use 10 spaces for tabs:

```
Notes:    1          2          3
          4          5          6
          seven          eight          nine
```

Keep tabs as tabs:

```
Notes:    12  3
          45  6
          seven  eight nine
```

Keep tabs as tabs (Using Standards Editor, inserted a tab character at beginning of each row to correct the spacing of the first two columns):

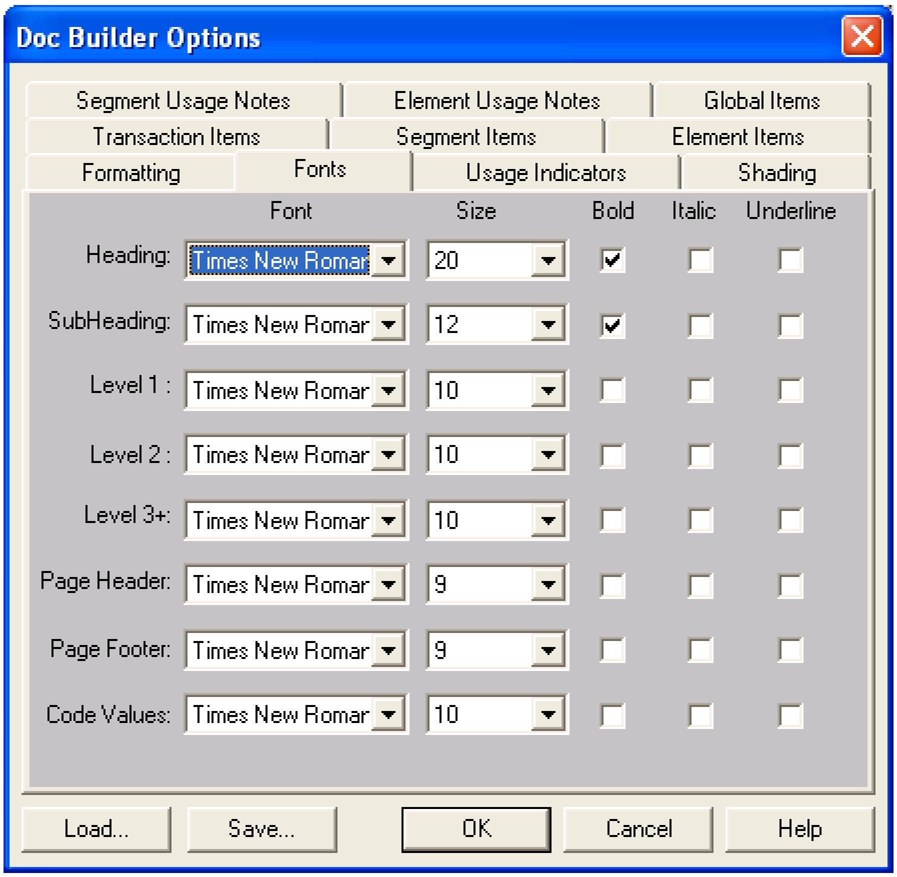
```
Notes:      1  2  3
            4  5  6
            seven    eight nine
```

Keep tabs as tabs (Using Standards Editor, inserted additional tab characters between columns to further correct the spacing):

```
Notes:      1        2        3
            4        5        6
            seven    eight    nine
```

Fonts Tab

Font Options are under **Profile | Options | Fonts**. To change any of these settings, click on the item. The settings in the Font and Size areas have drop-down boxes that reveal additional choices. A mouse click will toggle the choices in the Bold, Italic, and Underline areas.



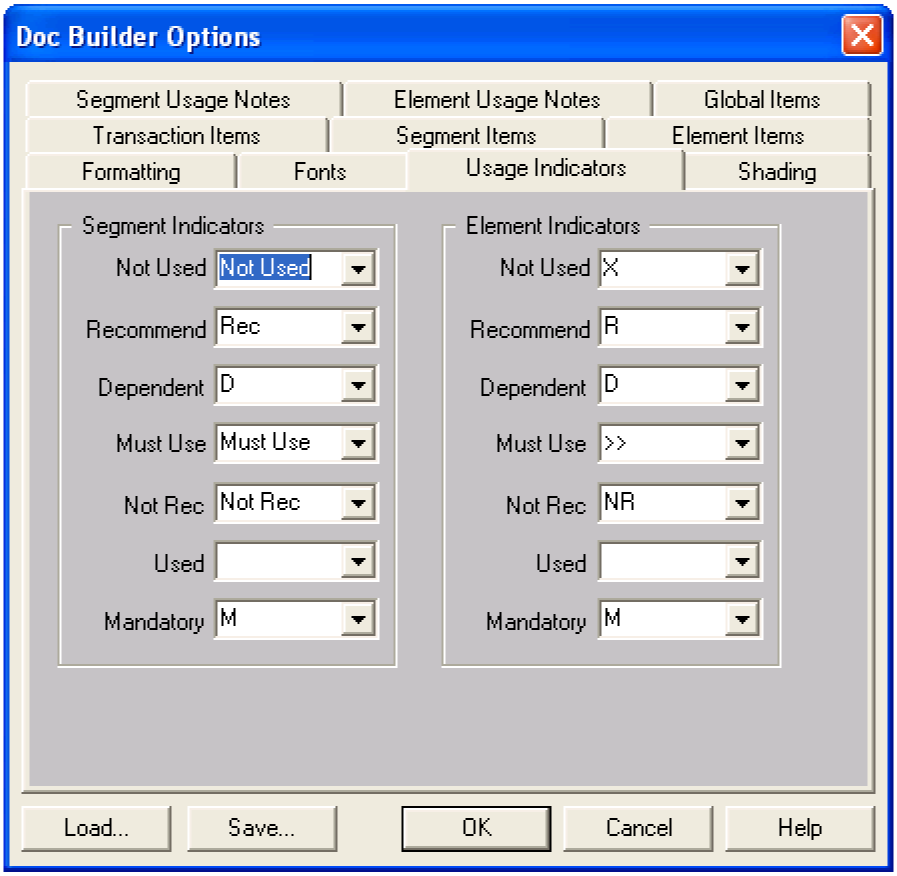
Headings include the transaction set or message name and description, the segment ID on each segment's page, and the functional group ID at the top of the segment table.

Subheadings include the words Introduction, Notes, Heading, Detail, Summary, Transaction Seg Notes, and Transaction Set Comments.

Usage Indicators Tab

What text or symbols indicate whether something is used? For these options, look under **Profile | Options | Usage Indicators**.

- Selecting from a list of usage indicators: Choose from the drop-down list.
- Omitting a usage indicator: Choose the blank line from the drop-down list.
- Typing text of your own choice: Type over the current text in the field.



Segment Indicators

In the segment table, what text or symbol represents your company's usage? Choose from the drop-down list or type text on the blank line under the drop-down arrow.

EDIFACT: You can choose **R** for a segment that is required (under the Must Use drop-down dialog box), **O** for a segment that is optional (under the Used drop-down list), and **A** for a segment that is advised (from the Recommend drop-down list).

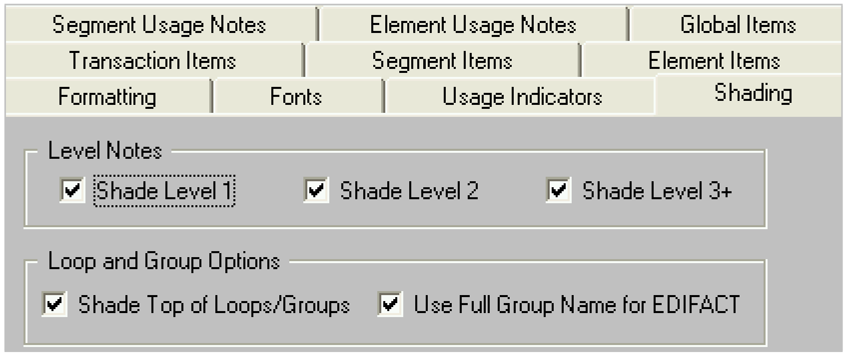
Element Indicators

On segment detail pages, what text or symbol represents your company's usage for an element. Click on the arrow in each area to see your choices, or type text or a symbol on the blank line under the drop-down arrow.

EDIFACT: You can choose **R** for an element that is required (under the Must Use drop-down list), **O** for an element that is optional (under the Used drop-down list), and **A** for an element that is advised (from the Recommend drop-down list).

Shading Tab

For options controlling shading and the display of loop and group headers, look under **Profile | Options | Shading**. To toggle any of these settings, click on the check boxes.



Level Notes Shading

Normally, the level notes have a shaded background. You can remove the shading by clearing the checkboxes.

If you used more than three levels of notes in this guideline, settings on the Level 3+ will effect levels 3 and above.

Shade Top of Loops/Groups

Normally, the segment table shades the background behind the top of a loop or group, and the entire loop or group is enclosed in lines. You can turn off the shading by clearing the check box for **Shade Top of Loops/Groups**. The enclosing lines remain.

Use Full Group Name for EDIFACT

If selected, the segment table shows the tops of EDIFACT groups with text like this:

```
Segment Group 1: TDT-LOC-DTM-RFF-FTX
```

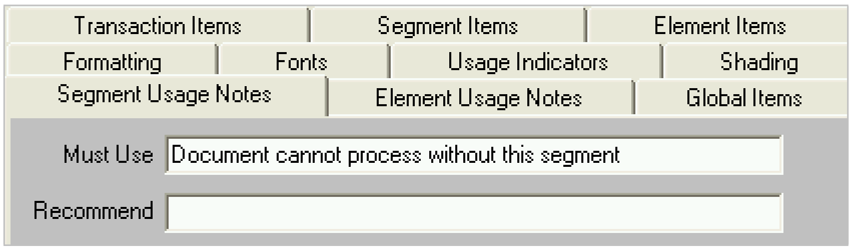
If you do not want this, clear the check box for **Use Full Group Name for EDIFACT**. This causes the tops of the groups to have text like this:

```
Segment Group 1
```

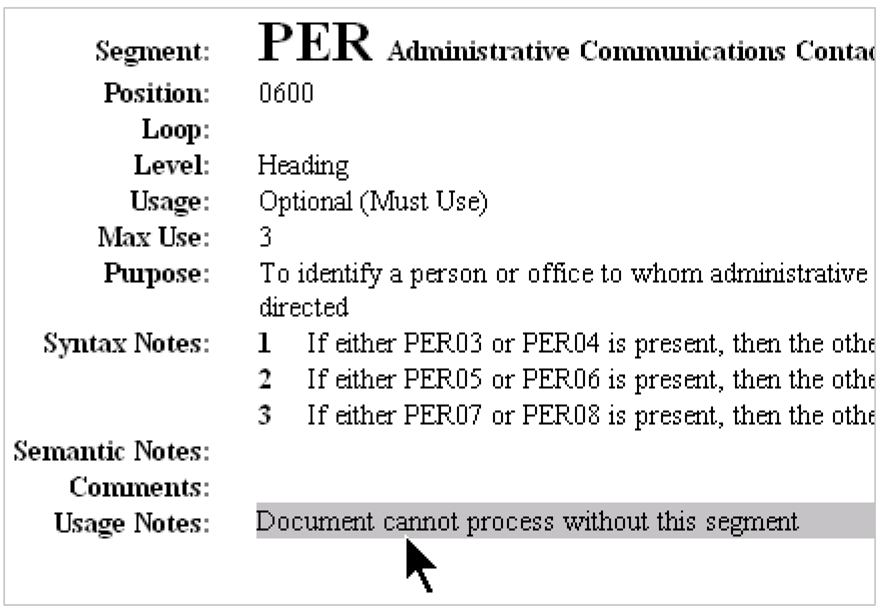
Segment Usage Notes Tab

To specify additional text for segment user attributes, choose **Profile | Options | Segment Usage Notes**.

You might fill out this box as follows:



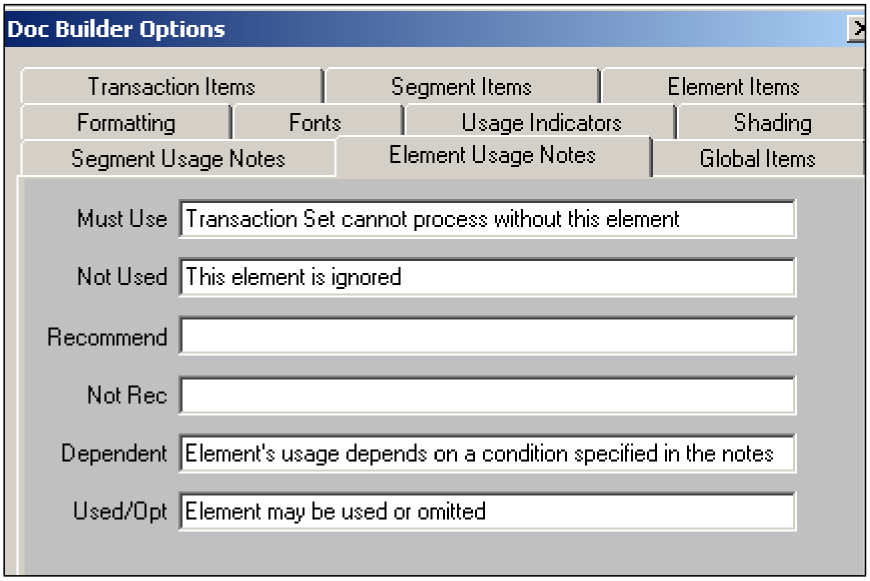
If you changed a segment's usage, the text will appear at the top of its segment's page, right after Semantic Notes, like this:



Usage notes are always shaded.

Element Usage Notes Tab

To specify your own text for element user attributes, choose **Profile | Options | Element Usage Notes**.



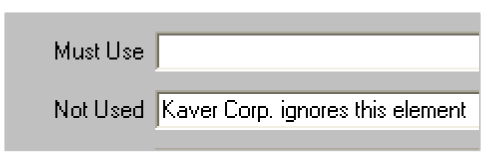
If you changed an element's usage, the text will print under the element's description:

Data Element Summary

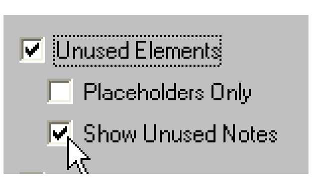
Data Element	Name	Attributes
128	**Reference Identification Qualifier**	**M ID 2/3**
	Code qualifying the Reference Identification	
	Transaction Set cannot process without this element	
	INDUSTRY: Reference Identification Qualifier	
	87 Functional Category	
	An organization or groups of organizations with a common operational orientation such as Quality Control Engineering, etc	

Unused elements

If you add a Not Used usage note:

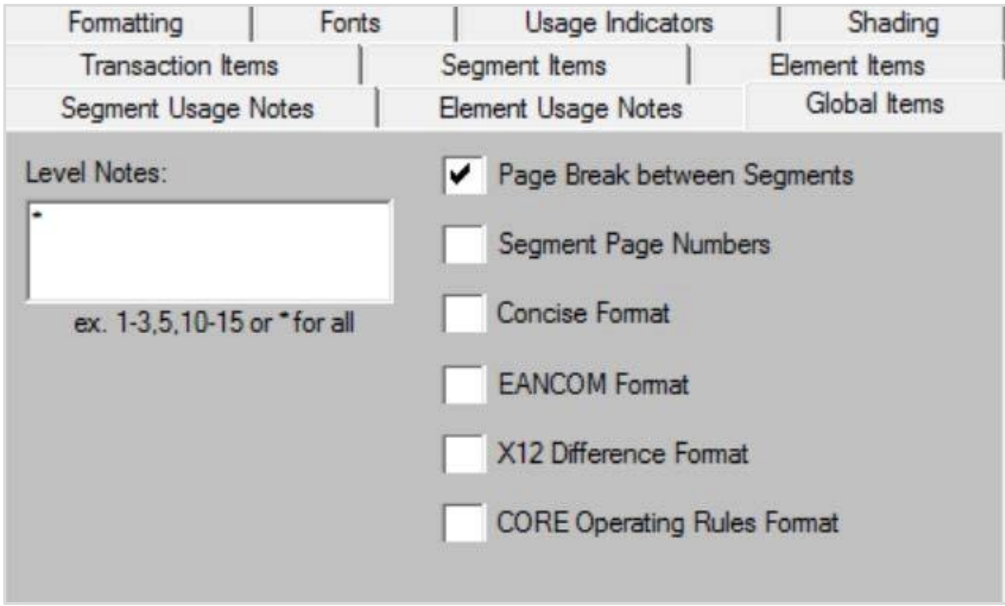


Then, to see them, you must go to the Element Items tab and display **Unused Elements** and their **Unused Notes**:



Global Items Tab

Options controlling general appearance are under **Profile | Options | Global Items**.



Level Notes

Type the note levels that should appear in the output.

Examples:

*	Print all levels of notes
1,3,4	Print levels 1, 3, and 4
1, 3-5	Print levels 1, 3, 4, 5

They were set up in Standards Editor. Each level serves a different purpose. For example, level 1 notes could be notes to the trading partners, level 2 notes could be for internal company usage, and level 3 notes and beyond could be segment examples.

Page Break between Segments

If selected, each used segment starts on a new page.

Segment Page Numbers

If selected, the segment table at the beginning of the guideline or MIG will contain page numbers in column 1 for used segments. If you use segment page numbers, consider:

- turning off **Unused Segment** under the Segment Items tab
- turning on **User Status** under the Transaction Items tab.

Concise Format

If selected, this saves space by removing page breaks and omitting most of the information at the top of individual segment pages. If Concise Format is selected, EANCOM Format and X12 Difference Format are disabled.

EANCOM Format

If selected, Doc Builder uses the EANCOM format for EDIFACT-based MIGs. If EANCOM Format is selected, Concise Format and X12 Difference Format are disabled.

X12 Difference Format

If selected, Doc Builder uses the DISA X12 User Guideline Format. This format lists only items with differences between their Level N Notes and the base X12 standard's Level N Notes.

If your document has no level note changes, the X12 differences will be blank. For example, if you made changes to the segments, but did NOT describe the changes in the Level Notes box, the differences listing will be blank.

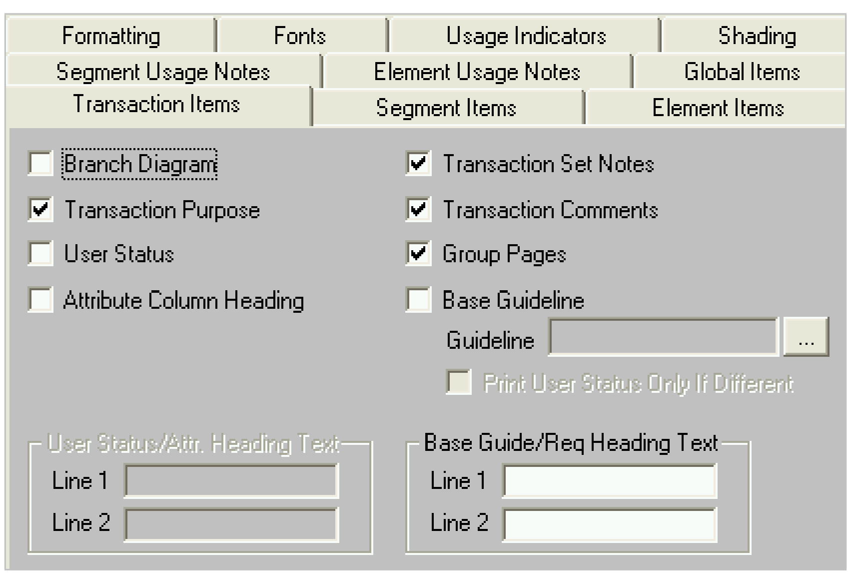
If X12 Difference Format is selected, Concise Format and EANCOM formats are disabled.

Core Operating Rules Format

If selected, DocBuilder uses the CORE Operating Rules Format. If CORE Operating Rules Format is selected, Concise Format, EANCOM, and X12 Differences formats are disabled.

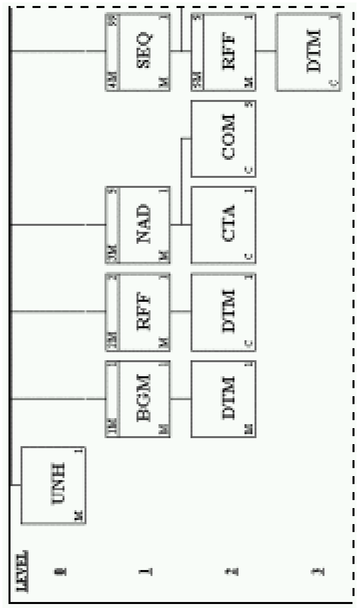
Transaction Items Tab

Options affecting the transaction or message as a whole are under **Profile | Options |Transaction Items**.



Branch Diagram

If selected under **Profile | Options |Transaction Items**, Doc Builder will include a branching diagram after the segment table. It will be turned sideways because of its shape. Branching diagrams do not appear in HTML output. A branching diagram is similar to a flow chart and is seen most often in EDIFACT messages. For example:



Transaction Purpose

If selected under **Profile | Options |Transaction Items**, this will appear right before the segment table on page 1, preceded by the word **Introduction**.

User Status

This setting under **Profile | Options |Transaction Items** determines the location of the user requirement and the requirement according to the base standard:

	User Status OFF	User Status ON
Segment	User requirement is in far left column of segment table. Base requirement is in the middle of the page. You can customize its column heading at the bottom right.	User requirement and base requirement are side-by-side columns in the middle of the segment table page. Customize the column headings at the bottom of the tab.
Element	User requirement is at far left of individual segment's page. Base requirement is to the far right with the Attributes.	User requirement and base requirement are side-by-side at the far right.

User Status ON

Doc Builder puts two separate columns in the middle of the segment summary page. One is for the requirement according to the base standard and the other is for user requirement:

Detail:

Pos. No.	Seg. ID	Name	X12 Req.	Topcat Req.
		LOOP ID - PO1		
010	PO1	Baseline Item Data	M	M
015	LIN	Item Identification	O	Not Used
018	SI	Service Characteristic Identification	O	Not Used
020	CUR	Currency	O	Not Used

The elements will have the two columns side-by-side too:

Data Element Summary

Name	Base Attributes	User Attributes
Entity Identifier Code	**M ID 2/3**	**M**

Code identifying an organizational entity, a physical location, property or an indivi

INDUSTRY: Entity Identifier Code

41	Submitter Entity transmitting transaction set

User Status has two advantages: (1) the requirements are side-by-side where the user can notice and compare them, and (2) the first column is then free to show page numbers if you select **Segment Page Numbers** on the **Global Items** tab.

To customize the column headings, use the Heading Text fields at the bottom of the Transaction Items tab.

Always turn User Status on if you select Segment Page Numbers under the Global Items tab.

User Status OFF

The first column on the page will be for the user requirement. A column in mid-page will show requirements according to the published standard. This example included **X12 Usage** in the Heading Text field for the base standard:

	Pos. No.	Seg. ID	Name	X12 Req.
			LOOP ID - PO1	
M	010	PO1	Baseline Item Data	M
Not Used	015	LIN	Item Identification	O
Not Used	018	SI	Service Characteristic Identification	O
Not Used	020	CUR	Currency	O
Not Used	025	CN1	Contract Information	O
Not Used	030	PO3	Additional Item Detail	O
			LOOP ID - CTP	
	040	CTP	Pricing Information	O

The elements will have the two columns separated too:

Data Element Summary

	Ref. Des.	Data Element	Name	Attributes		
M	BEG01	353	**Transaction Set Purpose Code**	M	1	ID 2/2
			Code identifying purpose of transaction set			
			00 Original			

If you select User Status, you cannot select Attribute Column Heading, and vice versa.

Attribute Column Heading

If selected under **Profile | Options |Transaction Items**, Attribute Column Heading places a column heading on the first column in the segment table.

Heading:

Topcat Req.	Pos. No.	Seg. ID	Name
M	010	ST	Transaction Set Header
M	020	BEG	Beginning Segment for Purchase Order
	040	CUR	Currency

After selecting Attribute Column Heading, type the headings in the Heading Text fields at the bottom (see below).

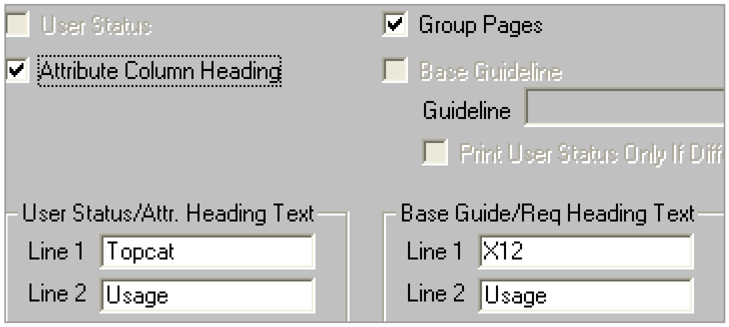
If you select Attribute Column Heading, you cannot select User Status, and vice versa.

Heading Text

Limit heading text to 7 characters so that it will print correctly.

With Attribute Column Heading ON

Under **Profile | Options |Transaction Items**, you can specify your own headings for both user and base requirements at the bottom:



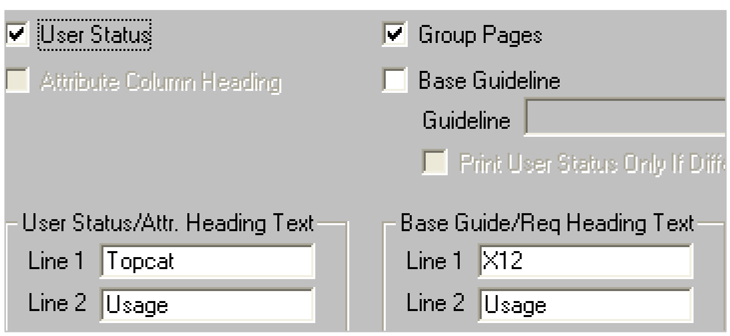
Heading Text Results with Attribute Column Heading ON:

Heading Section:

Topcat Usage	Pos. No.	Seg. ID	Name	X12 Usage
M	0010	UNH	Message Header	M
M	0020	BGM	Beginning of Message	M

With User Status ON

You can specify your own headings for both user and base requirements, which will appear next to each other on the segment table:



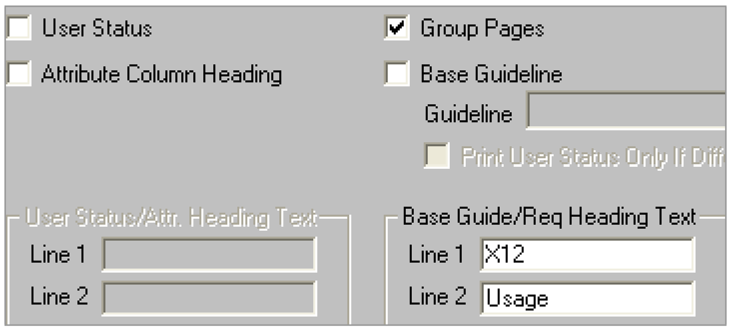
Heading Text Results with User Status ON:

Heading Section:

Pos. No.	Seg. ID	Name	X12 Usage	Topcat Usage
0010	UNH	Message Header	M	M
0020	BGM	Beginning of Message	M	M

With Attribute Column and User Status OFF

You can specify the **Base Guide/Req. Heading Text** heading:



This heading appears on the segment table like this:

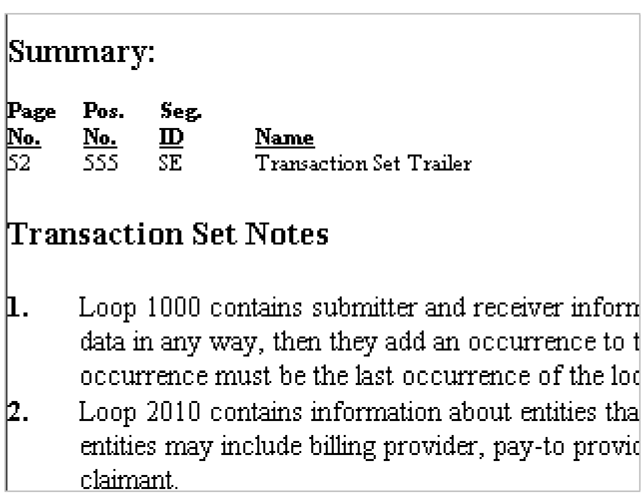
Heading Section:

	Pos. No.	Seg. ID	Name	X12 Usage
M	0010	UNH	Message Header	M
M	0020	BGM	Beginning of Message	M

Transaction Set Notes and Transaction Comments

(X12 only) Transaction set notes and comments are part of an underlying X12 standard.

If selected under **Profile | Options |Transaction Items**, they appear early in the document, at the end of the segment table.



Summary:

Page No.	Pos. No.	Seg. ID	Name
52	555	SE	Transaction Set Trailer

Transaction Set Notes

1. Loop 1000 contains submitter and receiver inforn data in any way, then they add an occurrence to t occurrence must be the last occurrence of the loo
2. Loop 2010 contains information about entities tha entities may include billing provider, pay-to provid claimant.

Group Pages

(EDIFACT only) If selected under **Profile | Options |Transaction Items**, each group is preceded with a page summarizing the group itself. For D93A or earlier, notes on the group do not print.

Base Guideline

Instead of using X12 or EDIFACT for base requirements, you can go to **Profile | Options |Transaction Items** and choose an industry guideline as the base. This allows you to show the requirements of the industry guideline and your own guideline.

To do this:

1. Select **Base Guideline**.

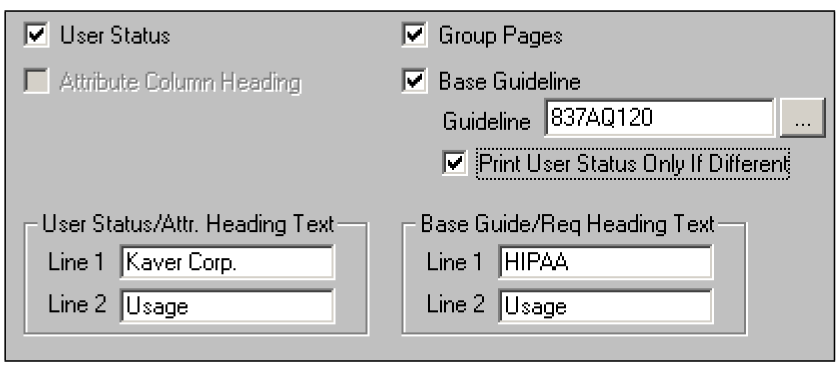
2. Type or browse to the guideline that served as the basis for your user guideline.

   Caution: The Base Guideline must be similar in structure to the guideline being printed. Loops, groups, segments, composites, and elements will show up as blank if they are added, deleted, or moved. Marking items as unused does not affect the structure.

3. Type the column headings in the Heading Text fields at the bottom.

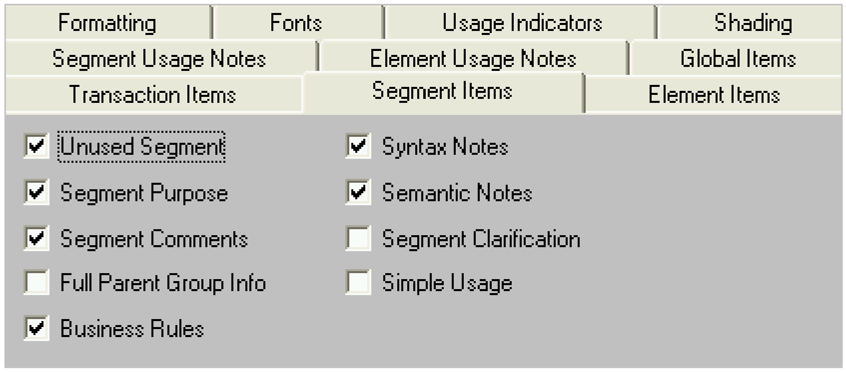
4. If you want to print the requirements only if they differ, select **Print User Status Only If Different**.

User Status is forced on and Attribute Column Heading is deactivated when you select Base Guideline.



Segment Items Tab

Options affecting individual segments are under **Profile | Options | Segment Items**.

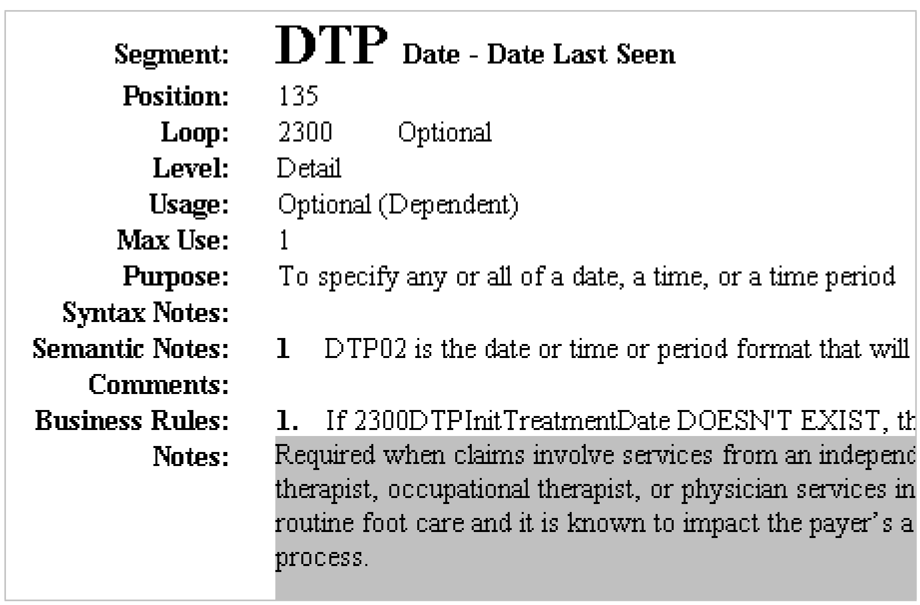


Unused Segment

If selected, unused segments appear in the segment table at the front of the document, preceded with whatever is selected for Not Used segments under the Usage Indicators Tab: **X**, **Not Used**, or **N/U**. Unused segments never get their own detail page.

Segment items at the top of detail pages

If selected, the following items appear at the top of each segment's detail page. You can edit these in Standard Editor.



Segment:	**DTP** **Date - Date Last Seen**
Position:	135
Loop:	2300 Optional
Level:	Detail
Usage:	Optional (Dependent)
Max Use:	1
Purpose:	To specify any or all of a date, a time, or a time period
Syntax Notes:	
Semantic Notes:	**1** DTP02 is the date or time or period format that will
Comments:	
Business Rules:	**1.** If 2300DTPInitTreatmentDate DOESN'T EXIST, th
Notes:	Required when claims involve services from an independ therapist, occupational therapist, or physician services in routine foot care and it is known to impact the payer's a process.

Segment Purpose: Print or suppress segment purpose. (Composites: Purpose will always print below the composite in the Data Element Summary area.)

Segment Comments: Print or suppress segment comments. (Composites: Standards Editor allows you to add comments in the composite dictionary, but they do not print in Doc Builder.)

Full Parent Group Info: (EDIFACT) If selected, this option lists all parent groups for segments that are in nested groups. The list appears in the header area of the individual segment detail page. For example, instead of Group: Segment Group 32 (Package Identification), it would say Group: SG25-SG30-SG32. “SG” means, “segment group.”

With Full Parent Group Info:

Segment:	**COM** **Communication Contact**
Position:	0230
Group:	SG2-SG5
Level:	3
Usage:	Conditional (Optional)

Without Full Parent Group Info:

Segment:	**COM** **Communication Contact**
Position:	0230
Group:	Segment Group 5 (Contact Information)
Level:	3
Usage:	Conditional (Optional)

Business Rules: Print or suppress display of segment business rules, which are local rules added by a Standards Editor user.

Syntax Notes: Print or suppress segment and composite syntax notes. (Composites: If you suppress segment syntax notes, composite syntax notes are suppressed too.)

Semantic Notes: Print or suppress segment semantic notes. (Composites: Standards Editor allows you to add semantic notes to the composite dictionary, but they do not print in Doc Builder.)

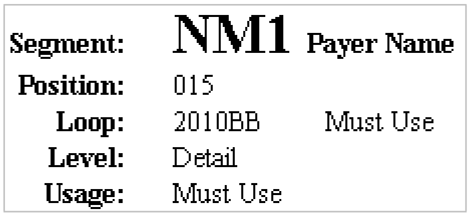
Segment Clarification: (EDIFACT) By default, this option is off. If selected, a segment clarification section is inserted at the beginning of the document. If you change a segment’s purpose in Standards Editor (in the message itself, not in the dictionary), then Doc Builder will list the changed purpose on a separate sheet of paper, right before the segment table at the beginning of the document. The individual segment pages would then show the purpose from the dictionary. If Segment Clarification is not selected, then the customized segment purpose will print on the individual segment pages.

Simple Usage: This prints only the effective requirement rather than the requirement for the base followed by the company’s usage.

Simple Usage Off:

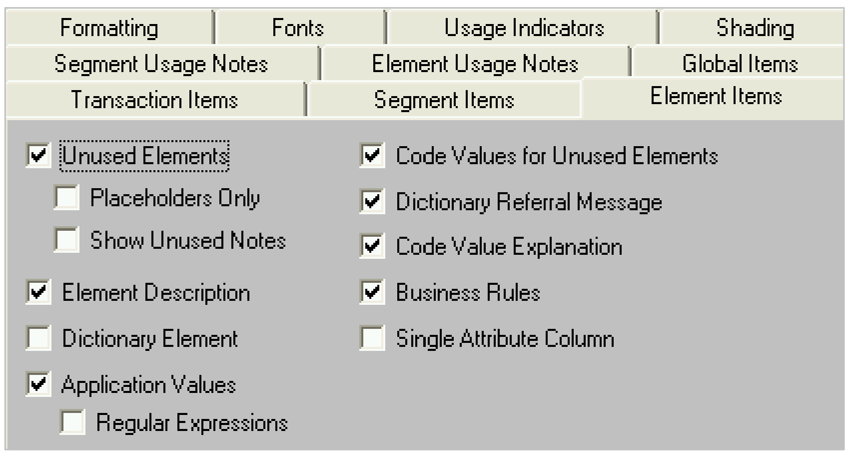
Segment:	**NM1** **Payer Name**	
Position:	015	
Loop:	2010BB	Optional (Must Use)
Level:	Detail	
Usage:	Optional (Must Use)	

Simple Usage On:



Element Items Tab

Options affecting individual elements are under **Profile | Options | Element Items**.



Unused Element

If selected, unused elements within used segments appear on each segment's detail page. They are marked as unused with whatever is selected in the Usage Indicators Tab: **X**, **Not Used**, or **N/U**.

Placeholders Only Prints unused elements if they are in the middle of the segment but does not print trailing unused elements.

Show Unused Notes Prints notes for unused elements.

If not selected, unused elements do not appear.

Element Description

If selected, the element description appears on the segment's detail page.

Dictionary Element

If selected, all dictionary elements used in the document are printed at the end of the guideline or MIG. Their code values print also. This can make the document very long.

Application Values

These local values are similar to code values, but are specified by the user in the Standards Editor (not part of the published standard), as opposed to code values, which are part of the published standard. If selected, they print on the segment's detail page, below the element to which they apply.

You cannot print application values that execute as part of a business rule.

Regular Expressions

These are patterns that application values must follow. They are added by a Standards Editor user. If selected, they print on the segment's detail page, below the element to which they apply. They are not readily understandable to most readers, and so a note should accompany the element explaining the pattern that the value must follow.

Code Value for Unused Element

If a code set was customized for an unused element, this option causes it to print on the segment's detail page.

Dictionary Referral Message

If selected, this line will appear below elements with code lists that have not been customized:

```
Refer to xxx Data Element Dictionary for acceptable code values
```

xxx is the version and release, plus the industry identifier code if you added one when saving the guideline or MIG in Standards Editor. Example: **Refer to D.97A.*AIAG* Data Element Dictionary for acceptable code values**. When saving in Standards Editor, **`AIAG`** was inserted into the Industry Identifier Code line.

Code Value Explanation

If selected, the explanation appears on the line below a code value that is part of a code set (customized list). It has no effect on dictionary code values.

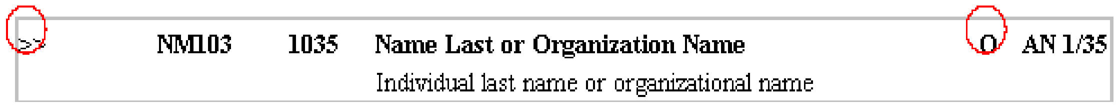
Business Rules

If selected, these local rules added by a Standards Editor user will appear below the element where they are attached. They may not be readily understandable and should be accompanied by a note explaining the condition. Example:

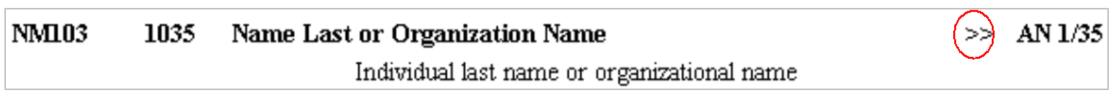
NM104	**1036**	**Name First**	**O**
		Individual first name	
		Business Rules:	
		1. If 1000ASubNameType EQ '1', then set Usage to 'Must Use'	

Single Attribute Column

Single Attribute Column OFF: Each element has the user requirement and a base requirement. The location of the requirements columns depend on the setting of User Status on the Transaction Items tab. With User Status, they appear next to each other. Without User Status, they appear like this:



Single Attribute Column ON: Elements have only the effective requirement:



Example: Setting up a Profile for Internal Use

Suppose we always print internal documents in this format:

- 2" right and left margins to leave more room for handwritten comments.
- Landscape orientation.
- Header that says “FOR INTERNAL USE ONLY.”
- Footer showing the guideline or MIG and the name of our company (KAVER Corp.)
- Unused segments and elements do not print.
- All notes print.

Here are the steps to set up a profile that does this:

1. **Set Paper Size and Orientation.** Enter Doc Builder and choose **File | Print Setup | Landscape | OK**. Now, choose **Profile | Page Setup**. Leave Letter 8 1/2 x 11 selected, and choose **Landscape**, then click **OK**.

2. **Set margins, headers, footers, notes, and unused segments and elements.** Choose **Profile | Options** and set:

   right margin: 2"

   left margin: 2"

   header: FOR INTERNAL USE

   right footer: KAVER CORP.

   Under Segment Items tab, clear the Unused Segment check box

   Under Element Items tab, clear the Unused Element check box

3. **Save the profile.** Click the **Save...** button, then save the profile by typing the filename **INTERNAL.DPF**. Save it in EDISIM’s <*workstation*>\User Files folder (<*workstation*> is the network name for your PC). Exit Doc Builder.

4. **Open the profile.** Open Doc Builder again and look under **Profile | Page Setup** and **Profile | Options**. The defaults are back.

   Now press *Esc* and then choose **Profile | Open** and choose the file containing the internal profile: INTERNAL.DPF. Choose Open.

   Look under Profile | Page Setup and Profile | Options. The settings from the INTERNAL.DPF are now showing.

5. **Let the printer know.** Select **File | Print Setup** and change to landscape orientation. Press **OK**.

6. **See the profile in action.** Use **File | Open Standard** and choose a guideline or MIG. Choose a small transaction or message (to save time), and leave the **View/Print** button at the bottom selected. Press **OK**. When the view appears, no special formatting is evident...no special margins, headers, or footers. View does not show these settings.

   Now choose **File | Print Preview** and admire the headers, footers, and wide margins. Profile settings do show up here. Select **Next Page** and notice that footers show page numbers for all pages after the first.

   Click the **Print** button, choose **Pages From** 1 **To** 3 and click **OK**. When the document prints, you can see the formatting created by our handy profile INTERNAL.

Shortcut method:

1. Exit and re-enter Doc Builder.

2. Choose **File | Print Setup** and change to landscape orientation. Press **OK**.

3. Choose **File | Open Standard** and select the guideline or MIG. Before pressing **OK**, move to the next step.

4. Click the **Profile** button to see the Formatting Options dialog box. Choose **Load**, then **INTERNAL.DPF** and click **Open**. Click **OK** until you return to the Transaction Set/Message Selection dialog box. Click **OK** to generate the file.

Tips:

Use **File | Print Preview** to show formatting such as margins, headers, and footers.

It is most efficient to choose the profile from the Transaction Set/Message Selection dialog box.

If you are displaying a document when you choose a new profile or otherwise change formatting, Doc Builder asks if you want to regenerate. Answer *Yes*, or later choose **File | Re-generate Current**.

If you make margins wider, use **File | Print Preview** to be sure the information still fits without unwanted wrapping.

To change orientation (landscape/portrait):

1. Choose **File | Print Setup | Orientation**.
2. Choose **Profile | Page Setup | Orientation**.
3. Choose a guideline or MIG.

Enveloping

Doc Builder does not include enveloping when you print typical guidelines and MIGs.

To print customized enveloping, open Standards Editor and use **File | Import** to import enveloping from the EDISIM's **AddlStds** folder. This folder is on the network if you are using a workstation installation. Enveloping files are named **ICS***xxx***.sef**, where *xxx* is the version.

You can use Standards Editor to customize these enveloping guidelines or MIGs and save them to names of your choice.

You can then open and print them in Doc Builder.

To create an RTF file that contains both enveloping and the transaction set, save the enveloping guideline to RTF. Then, when saving the transaction set or message to RTF, use the **Include Header File before document text option**. See Exporting to RTF on page 45.

Creating HTML

Doc Builder can create HTML files that contain specific guidelines or MIGs to offer from your web site. You can add customized information such as your company logo, specific headers and footers, and a background graphic (watermark).

File organization hints
File organization is essential when creating HTML because you can produce a large number of files. Please discuss your plan with your webmaster before you begin. Your webmaster may help you build a directory structure that provides for easy file retrieval and file maintenance.

Steps in Creating HTML Files

1. Prepare the document by generating it for View/Print, using the profile options that you want to have in your HTML.

   a. To do this, choose a guideline or MIG with **File | Open Standard**.

   b. From the Transaction Set/Message Selection dialog box, use the Profile button to adjust the settings, then return to this dialog box.

   c. With **View/Print** selected, double-click on the desired transaction or message.

2. With the transaction set or message displaying, select **File | Create HTML**.

3. In the **Create Web Page** dialog box, define the folder and root file name for the HTML files.

   Recommendations:

   One folder per transaction set or message

   Consistent naming scheme … such as using the transaction set number (or EDIFACT message name) in the root file name. When Doc Builder completes the HTML generation process, it creates a set of HTML output files that start with the name that you key in. Having a consistent method for naming files will help you keep organized.

   Select the folder where you will create the HTML files. It may be a good idea to use the  button to create a new folder for these files. If desired, change the name for the root HTML file in the **File name** field.

   The **Save as type** area is only used to display names of all files (*.*) or web documents.

   Click **Save**.

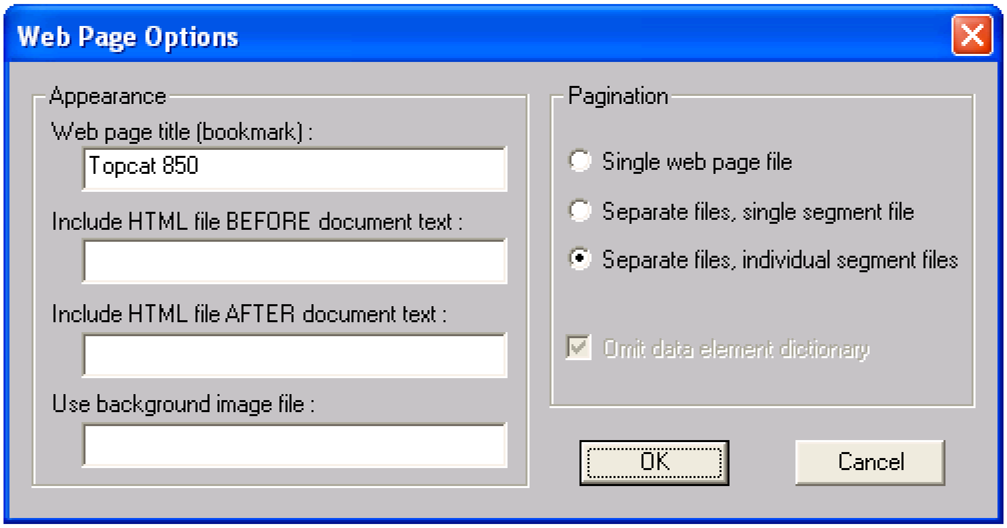
4. Define the web page appearance and pagination options. A guideline or MIG will create one or many HTML files, depending on which pagination strategy you choose (see HTML Appearance and Pagination Options below).

5. Click **OK** to create the files.

6. When finished, locate the root file with Windows Explorer and double-click on it.

HTML Appearance and Pagination Options

The Web Page Options dialog box lets you define the appearance and pagination for the HTML files you are about to create. To open this box: view a document, choose **File | Create HTML**, and then name the root file as explained in Steps in Creating HTML Files above.



Your steps include:

1. Type the Appearance information, if any.
2. Click a radio button to select the Pagination.
3. Click **OK** to create the HTML output files.

HTML Appearance Options

Web page title (bookmark)

This optional field is used for the HTML document title. It appears on the browser's title bar, serves as the text for bookmarks or favorites, and may be used by search engines.

Include HTML file BEFORE document text
Include HTML file AFTER document text

These two optional fields let you specify files containing HTML to be copied to the top and/or bottom of each HTML file generated. They must be short HTML fragments (not entire documents).

The BEFORE file might contain a headline, logo, or short description of your company.

The AFTER file is footer information such as company logo, navigational directions ("click here to go back to our home page"), or contact instructions ("for more information, contact…").

File locations: These files must be on the PC in the folder where you are creating the HTML output files. They do not need to exist on the web server machine because they already will have been copied into the HTML output files. Additionally, if you have files that are mentioned in and used by the header or footer fragment files (example: a company logo), the HTML fragments can include the paths to these files, or you can put them in the same folder with the finished HTML output files. Consult your webmaster for additional information.

Use background image file

This optional field contains the filename of a background graphic known as a watermark.

File location: This file must be on the web server machine, either in the folder with the HTML files that use them, or in the location specified for them by the HTML. If you want to see the watermark when your browser displays the HTML files on your PC, you can place this file on the PC in the same folder where you are creating the files.

HTML Pagination Options

The pagination area determines how the HTML will be split into separate files. The best strategy depends on what your users want to do with the HTML. For example, you may have a user that wants to look at only a few segments. In that case, you would want each segment's detail in a separate file. That way, the user could quickly load only those that are needed.

Consider using individual segment files for viewing segments via browser, and also offering an RTF file for download.

HTML Filenames

All HTML filenames start with the root name, which is selected by you when creating the HTML.

Added to root filename	Example	File contains…
	Ts810.htm	Root file
4-digit number	Ts810-0002.htm	Details about one segment
SEGS	Ts810-segs.htm	Details about all segments
DICT	Ts810-dict.htm	Element dictionary

Single web page file (one file)

If you select this pagination option, the entire guideline or MIG will be included in one large output file.

For example, if your root file name is **ts810**, you will see one large output file called **ts810.htm**. It contains the segment table and the detail information for all used segments

Advantages and Disadvantages:

- \- Retrieval time: Long.
- \- Browse time: Slowest when navigating through links.
- \+ Printing: Easiest to print (only one file).
- \+ Downloading: Easiest to download a local copy.
- \+ Managing files: Easiest to manage files on server.
- \- Disk space: Large disk cache consumption.

Separate files, single segment file (two files)

If you select this pagination option, the segment table will be in one smaller file, and the detail information for all used segments will be in a second file.

For example, if your root file name is **ts810**, you will see two files:

- one small output file called **ts810.htm**, which contains the segment table
- one large output file called **ts810-segs.htm**, containing the detail for all of the segments

Advantages and Disadvantages:

- \- Retrieval time: Fairly long.
- \- Browse time: Slow when navigating through links.
- \+ Printing: Reasonably easy to print the two files.
- \+ Downloading: Reasonably easy to download local copies of two files.
- \+ Managing files: Easy to manage two files on server.
- \- Disk space: Large disk cache consumption.
- \+ Good choice if most users will only view the list of segments and loops at the beginning of the document.

Separate files, individual segment files (many files)

If you select this pagination option (the default), the segment table will be in one small file. The detail information for each used segment will be in its own file, resulting in a multitude of small segment detail files.

For example, if your root file name is **ts810**, you will see these files:

- One small output file containing the segment table called **ts810.htm**.
- Multiple output files - one file for each segment detail: ts810-0001.htm, ts810-0002.htm, ts810-0003.htm, etc.

Advantages and Disadvantages:

- \+ Retrieval time: Short.
- \+ Browse time: Can navigate through links quickly.
- \- Printing: Tedious to print. Must print each file separately.
- \- Downloading: Tedious to download if the user wants many segments.
- \- Managing files: Possibly more difficult to manage a multitude of files.
- \+ Disk space: Smallest disk cache consumption if only a few segments are viewed.
- \+ Good choice if most users will only view the list of segments and loops at the beginning of the document and/or few segments

Omit data element dictionary

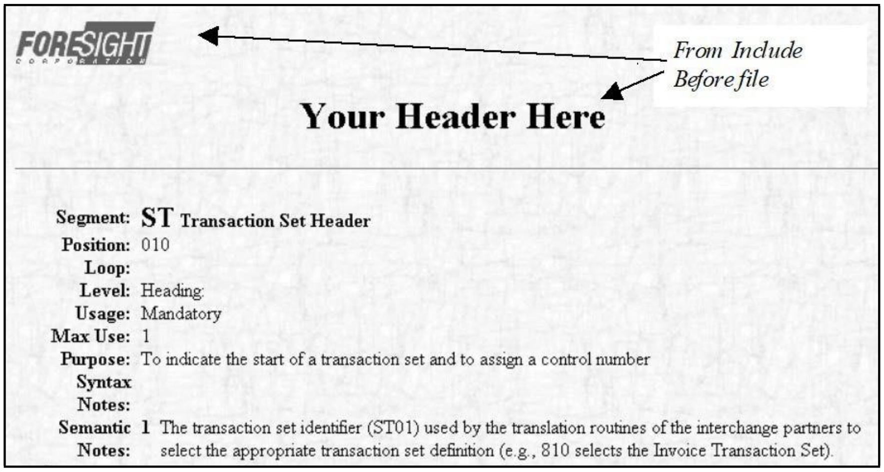
The default for this option is to omit the Data Element Dictionary with your HTML output files. To include the dictionary of used elements plus their dictionary code values, toggle the checkmark off with a mouse click.

Is Omit data element dictionary faded? You must first turn on **Profile | Options | Element Items | Dictionary Element**.

The Data Element Dictionary is always in one separate, very large file. For example, if your root file name is **ts810**, you will see one large output file called **ts810-dict.htm**. If you are unsure about using this option, consult with your webmaster.

NOTE: The data element dictionary HTML file could take between 5 and 15 minutes to load on slow dialup connections to the Internet. You may wish to omit the Data Element Dictionary when creating HTML files for remote users and include it for in-house LAN users.

Sample HTML Output



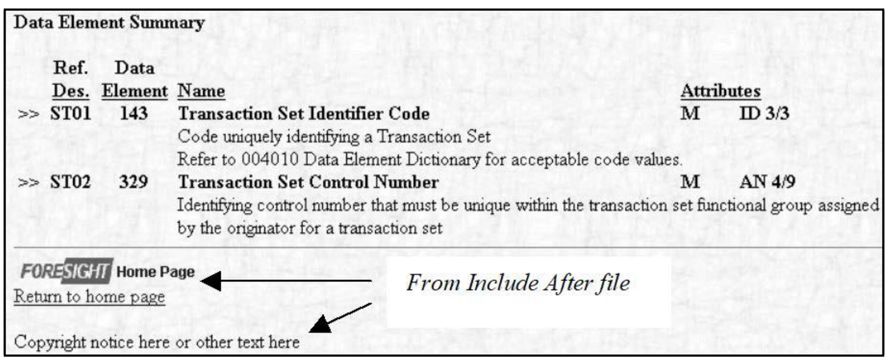
FORESIGHT CORPORATION

From Include Before file

Your Header Here

Segment: **ST** **Transaction Set Header**
Position: 010
Loop:
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To indicate the start of a transaction set and to assign a control number
Syntax Notes:
Semantic Notes: 1 The transaction set identifier (ST01) used by the translation routines of the interchange partners to select the appropriate transaction set definition (e.g., 810 selects the Invoice Transaction Set).

Top of an HTML-generated file with header, company logo, and watermark.



Data Element Summary

	Ref. Des.	Data Element	Name	Attributes	
>>	**ST01**	**143**	**Transaction Set Identifier Code**	**M**	**ID 3/3**
			Code uniquely identifying a Transaction Set Refer to 004010 Data Element Dictionary for acceptable code values.		
>>	**ST02**	**329**	**Transaction Set Control Number**	**M**	**AN 4/9**
			Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set		

FORESIGHT **Home Page**
Return to home page

From Include After file

Copyright notice here or other text here

Bottom portion of an HTML-generated file with footer, company logo, and watermark.

Difference between Screen Display and Web Browser

Since web browsers differ in the way in which page elements are spaced, it is impossible to make the HTML output files look identical to the Doc Builder screen display.

The options that control shading, underlining, and font size in Doc Builder are honored to the extent possible in the HTML output. However, the HTML language does not permit specifying a font in exact point size. Modern web browsers support seven (7) font sizes, ranging from -3 to +3, with 0 being the default font size. Therefore, the fonts that you specify in Doc Builder are handled as follows:

Point Sizes	
Doc Builder	**HTML File**
1	-3
2 - 5	-2
6 -9	-1
10 - 13	0
14 - 17	+1
18 - 21	+2
22 +	+3

If you are selective in making font size choices in **Profile | Options | Fonts**, you will maintain reasonable control over the appearance of the HTML output. Because some web browsers do not support choice of fonts, and because there is no way to ascertain what fonts users will have available to view the files, all text in the HTML files will use the web browser's default font.

Exporting to RTF

You can export a document to a word processor for editing or special printing. The export file will be in Rich Text Format (RTF), which imports into Windows word processors.

Special Considerations:

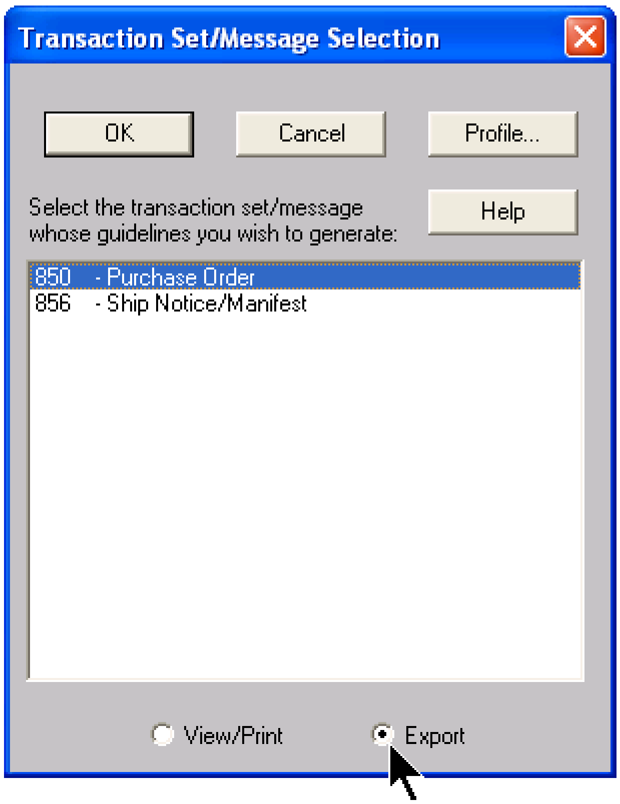
- Changes in RTF files should be done sparingly, since RTF files cannot be re-imported into EDISIM.
- MS Word will not convert a branching diagram to HTML.
- To export in SEF format, use Standards Editor.

Exporting steps include:

1. Open a guideline or MIG with **File | Open Standard**.

2. Click the profile button in the Transaction Set/Message Selection box and set the desired profile options (see Doc Builder Options on page 14).

3. Choose a transaction set or message from the guideline or MIG – while the **Export** button is selected.



4. Choose **OK**.

5. Enter a filename and folder for the export file.

   Choose any other options at the bottom of the box (see RTF Export Options on page 47).

6. Click **Save**.

7. Once you open your RTF file in a word processor, update the page number links.

   To do this in Word:

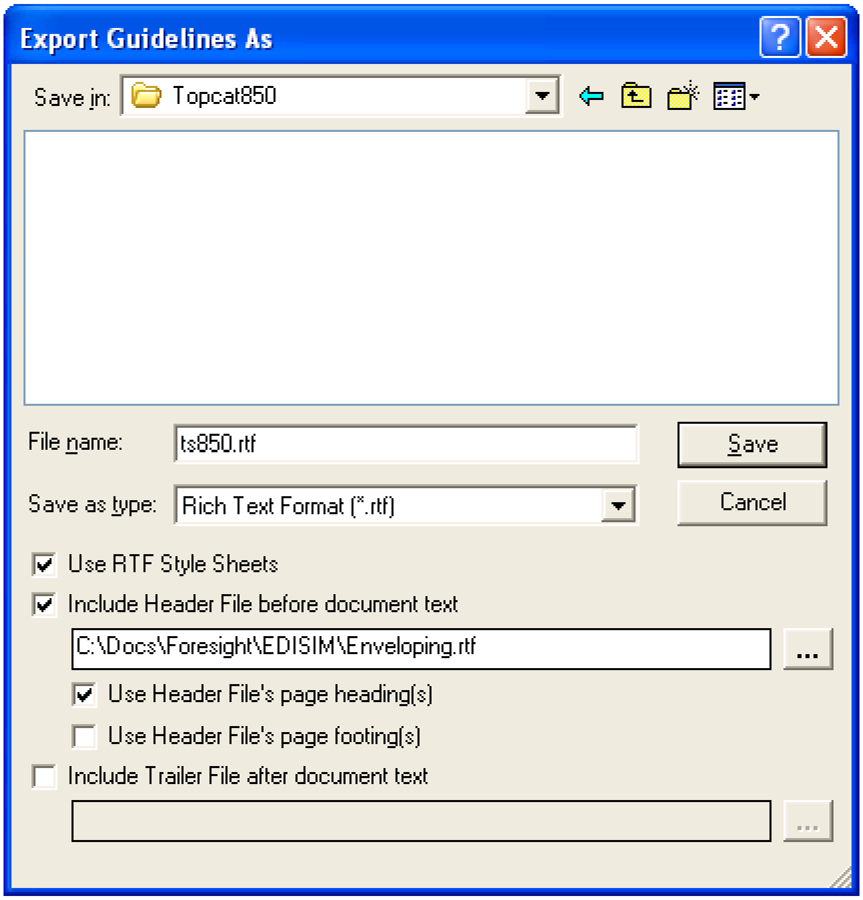
   a. Use *Ctrl*-**a**

   b. Press the **F9** key.

RTF Export Options

When exporting to RTF, you have these options:

Option	Description
Use RTF Style Sheets	If selected, the RTF file will use styles for formatting. This lets you easily change the look of the output by changing the style in your output RTF. Styles supplied by Doc Builder start with “DB” and include: DBCodes DBFooter DBHeader DBHeading DBNormal DBNotes1 DBNotes2 DBNotes3 DBSubheading If you use a Header File and it contains any styles with these names, Doc Builder does not overwrite them. If you do not select Use RTF Style Sheets, the RTF file will use local formatting.
Include Header File before document text	The path and name of an RTF file that is to be inserted at the beginning of the output. This might be a cover sheet, information about transmittal or enveloping, etc. If you wish to have a page break between the header file and the segment table page, include it at the end of the header file.
Use Header File’s page heading(s)	Use the header file’s page heading throughout the document. Otherwise, the RTF file will use the header file’s page headings for those pages and the one supplied in the Doc Builder profile for the transaction set or message.
Use Header File’s page footing(s)	Use the header file’s page footers throughout the document.
Include Trailer File after document text	The path and name of an RTF file that is to be inserted at the end of the output. A page break is automatically added before this file.



Alternate Routes to Exporting

If a guideline or MIG is open, you can get to the Export dialog box at any time by using **File | Generate Guidelines**, then choosing the **Export** button from the Transaction Set/Message Selection dialog box.

Formatting and your Word Processor

If you changed fonts within Doc Builder (under **Profile | Options | Fonts**), the RTF file will contain your chosen fonts. If you have not changed fonts, the RTF file uses the following font sizes, all in Times New Roman:

Large headings: 20 pt

Small headings: 12 pt

Body font: 10 pt

1" margins all around.

Footers are assumed to be within the bottom margin.

3 Command Line Options

Overview

You can use Document Builder to export HTML or RTF output from a command line.

Note: Command line options are only available when the Document Builder program is not already opened on the system.

Note: Document Builder cannot process encrypted guidelines.

Command Line Format

*Path***FSDocBld -fsstd "**G*uideline***" -fsset** "*setID*" **-fsprofile** "*profileName*" **-fsohtml** "*HTMLdir*" **-fsortf** "*output*RTF*FilePath*" **-fstitle** "*pageTitle*"

Where:

Path\FSDocBld	Required. Path (if necessary) and filename of Document Builder executable. In a default installation, this is `C:\TIBCO\EDISIM\Bin\FSDocbld.exe`

-fsstd *"Guideline"*	Required. An unencrypted guideline in the EDISIM database. Example: `"Kaver810”`
-fsset "*setID*"	Required. A single transaction set OR all transaction sets in a standard. Example: `FSDocBld -fsstd "FSORDERS"` **`-fsset "810"`** `-fsprofile "C:\TIBCO\EDISIM\Bin\OrderRTF.DPF" -fsortf "C:\OrderDocs"` **OR** Example: `FSDocBld -fsstd "FSORDERS"` **`-fsset "ALL"`** `-fsprofile "C:\TIBCO\EDISIM\Bin\OrderRTF.DPF" -fsortf "C:\OrderDocs"`
-fsprofile "*profileName”*	A Document Builder profile (.dpf). Example: `"C:\TIBCO\EDISIM\Bin\external.dpf"`
-fsohtml "*HTMLdir*"	One **-fso** option is required per command line (**-fsohtml** or **-fsortf**). Outputs one or more HTML files. The "*HTMLdir*" should be an existing empty directory. The directory name should be the same as the guideline name. Example: `"C:\TIBCO\EDISIM\Bin\Kaver810\"` **Note:** Document Builder creates the bottom level folder if it does not exist, but does not create the entire tree. For example, `-fsohtml "C:\DirX\DirY\DirZ"` results in the creation of folder `DirZ` if it does not exist. However, if folders `DirX` and/or `DirY` are missing, Document Builder generates an error and quits.

-fsortf *"outputFilePath"*	Outputs one or more RTF files. ▪ If specifying single transaction set (e.g., **-fsset "837"**) Enter the path and filename of the resulting RTF file **Example:** `FSDocBld -fsstd "FSSD5010-DISAcert-837PX222" -fsset "837" -fsprofile "C:\Source-5.x\EDISIM50\Bin\DISAcert.DPF" -fsortf "C:\Source-5.x\DISAcertDocs\837P\DISAcert_837X222.rtf"` ▪ If specifying all transaction sets in a standard (e.g., **-fsset "ALL"**) Enter the path to a directory (no filename) for output of the resulting RTF files. Each set will be output to that folder with a file name of std_set.rtf where std is the standard name and set is the set ID. **Example:** FSDocBld -fsstd "FSORDERS" -fsset "ALL" -fsprofile "C:\TIBCO\EDISIM\Bin\OrderRTF.DPF" -fsortf "C:\OrderDocs" **Folder Creation** Document Builder creates the bottom level folder if it does not exist, but does not create the entire tree. For example**, -fsortf** "C:\DirX\DirY\DirZ\OrderRTF.DPF" results in the creation of folder DirZ if it does not exist. However, if folders DirX and/or DirY are missing, Document Builder generates an error and quits. **RTF Option Settings** **-fsortf** obtains RTF option settings from the ▪ profile file specified with the **-fsprofile** option **or** ▪ the default profile (usually `$fsdeflt.dpf`), if the **-fsprofile** option is not used.
-fstitle *"pageTitle"*	Text to use as a page title. Example: `"Kaver Corp. X12-4010 810 Invoice"`

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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

Legal and Third-Party Notices

This software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. See the readme.txt file for the availability of this software version on a specific operating system platform.