TIBCO Foresight® EDISIM®

Standards Editor User Guide

Version 6.21.0 | January 2025

Contents

Introduction

What Can You Do with Standards Editor?

TIBCO Foresight® EDISIM® guideline editing software allows you to:

Edit guidelines

- With Standards Editor, start with TIBCO Foresight's published standards and industry guidelines, and create your own company guidelines by adjusting the characteristics of any segment, element, or code value.
- Create completely new base standards for a group, industry, or committee.

Use guidelines

- Print formatted documentation.
- View the guideline online.
- Generate test data from it using EDISIM® Test Data Generator.
- Check data for compliance to your guideline or MIG by using EDISIM Analyzer or another TIBCO Foresight product.
- Compare guidelines or MIGs to find out how they differ by using Comparator; optionally migrate changes you have made.
- Use your EDISIM guidelines in all other TIBCO Foresight products.

In addition to EDI, Standards Editor can work with:

Delimited and fixed-length data

You can create or import delimited and fixed-length file guidelines and then use these to validate data. See **TIB_fsp_edisim_n.n.n_FlatFilesAtForesight.pdf** in EDISIM's Documentation directory.

XML

You can import XML schemas and DTDs, modify them, and use them to validate data. See **TIB_fsp_edisim_6.21.0_XMLatForesight.pdf** in EDISIM's Documentation directory.

Respect the Underlying Standard

New standards may be published while you are doing business. Standards Editor gives you the flexibility to plan for and accommodate such changes.

However, you should respect the rules established by the published standard on which your guideline is based.

In particular, avoid marking mandatory segments as Not Used, since they are needed to assist translators in navigating. Like a translator, Analyzer expects you to adhere to the underlying standard so that it can make sense of the data it is checking.

Guideline Best Practices

When developing guidelines:

- Spend time on your guideline – it is well worth the investment
- Consistent naming conventions for guidelines
- Consistent pattern for guideline descriptions
- Level notes – consistent naming of levels (**File** | **Properties**)
- Level notes – minimum of an internal note for each change; possibly external
- Level notes - Be discreet in wording, even for internal notes
- Mark things unused only if you won't accept them if they come in - use notes for items that you ignore
- Honor X12 requirements, lengths, syntax rules, etc.
- Change usage under User Attributes; leave Requirement Designator for X12 usage
- Clear communication about who can edit each guideline – others request changes through them
- Table or spreadsheet of guidelines, who's in charge, and where they are used

- Use EDISIM Validator to test each rule as you develop it – positive and negative test
- Consistent validation profiles (APF) for validation
- For your customer error file, designate error number ranges for each guideline and carefully merge into an error file for production
- Back up your guidelines, error files, and user tables

Documentation:

- Consistent Doc Builder profiles (DPF)

Test data:

- For each transaction, develop a small transaction set model that creates good data – export and share with others as a base for test cases
- For test cases, save-as from a base model and have a consistent naming scheme that links to the test cases and the model
- Develop inbound and outbound enveloping – export and share with others

Navigation

Scroll Bars and Panes

Standards Editor uses typical Windows menu bars, popup menus, scroll bars, etc. You should be familiar with Windows applications before working with EDISIM.

You can move through any pane within Standards Editor by using cursor arrows, your mouse, or the vertical and horizontal scroll bars. You can resize panes and columns by dragging the splitter bars.

Keyboard

Shortcut keys

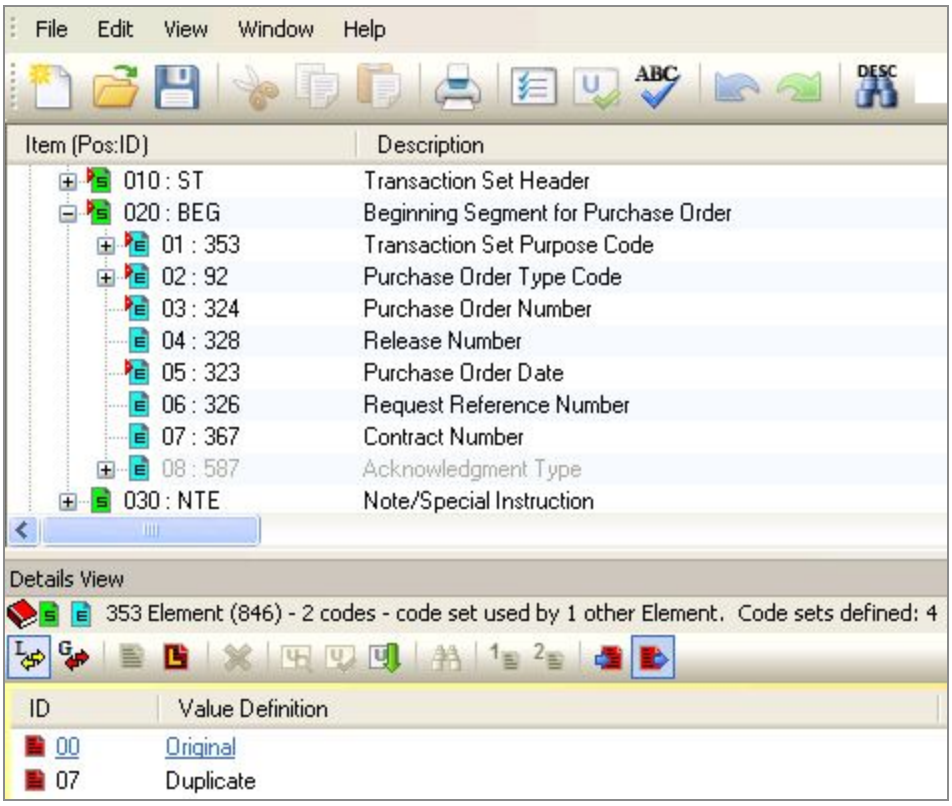
Many menu commands have shortcut keys, which are listed on the menus.

Alt+key	To open a menu, hold down Alt and press the underlined key.
Esc	To cancel the current activity, press Esc.
Enter	To execute the selected choices, press Enter (often acts as an OK).
Tab	To move to the next area or button in a box, press Tab.
Shift+Tab	To move backwards, press Shift+Tab.
Space Bar	To open or close an item (in the Item Column), press the Space Bar.
PgUp, PgDn	To move up or down 1 screen in the panel, use PgUp or PgDn.
Del	Deletes items. Same as **Edit** | **Delete**.

Toolbar

Standards Editor toolbars let you access common features with a mouse click. Rest your mouse cursor over a button to see an explanation of what it does.

In addition to the top toolbar, the bottom pane has a toolbar when the Code Values tab is showing.

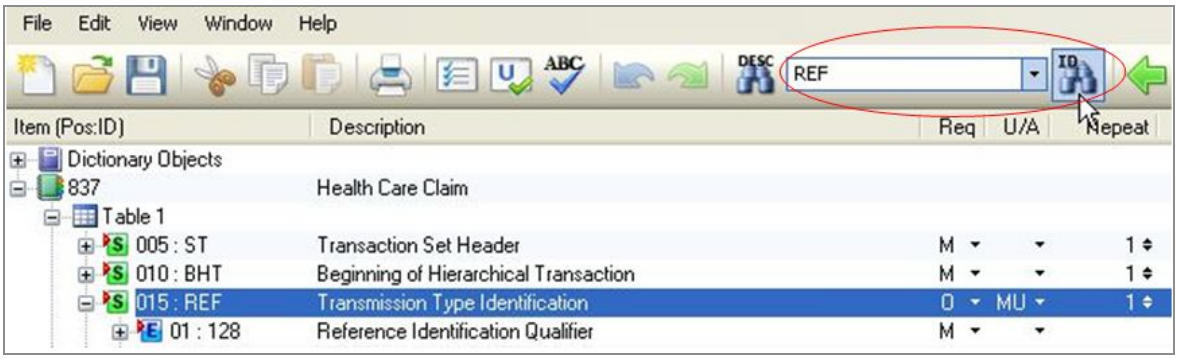


Searching and Finding

Top Pane – Guideline View: Searching the ID Column

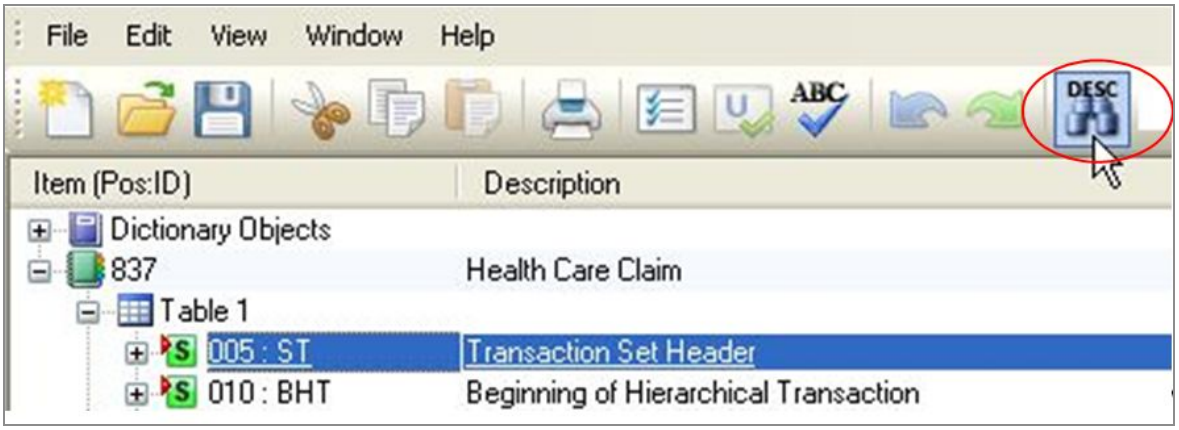
To find an entry in the ID column, click anywhere in the top pane and type in its ID or Tag in the drop list area. For example, to locate a REF segment:

1. Click anywhere in the top pane.
2. Expand the item in the top pane. Only displayed items are searched.
3. Type **REF** in the search box on your toolbar.
4. Choose **Edit | Find ID Text** or click the  toolbar button. Click again to find the next occurrence.

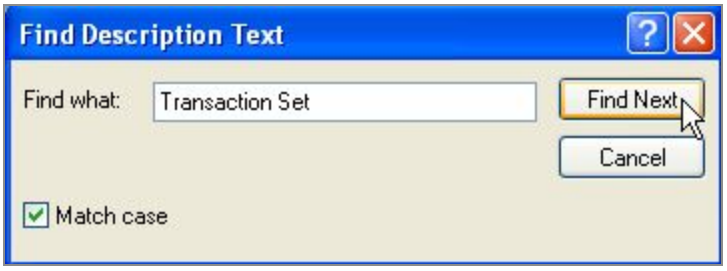


Top Pane – Guideline View: Finding Text in the Description Column

1. Click in the top pane.
2. Expand the item in the top pane. Only displayed items are searched.
3. **Choose Edit | Find Description Text... or click the**  **toolbar button:**



4. In the Find dialog, type the *first part* of the description you are seeking. Note the setting of the **Match case** option.
5. Click **Find Next**. Click again to find the next occurrence.



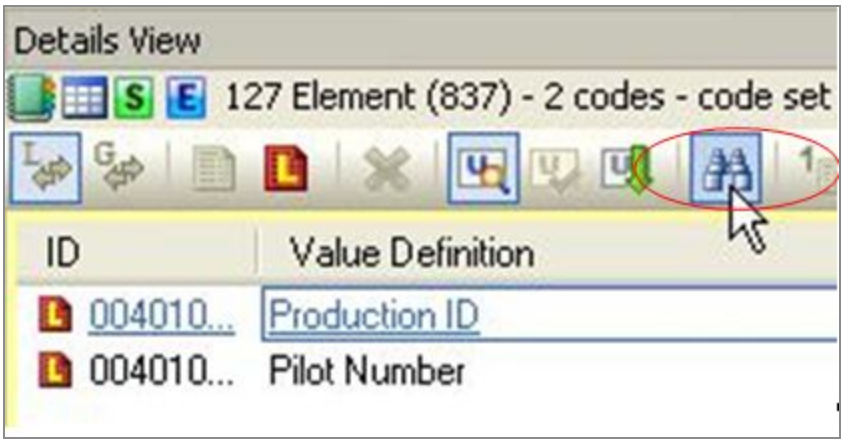
Bottom Pane – Details View: Code Values Tab

To find a code:

1. Click in the list of codes.
2. Start typing the code's ID.

For more advanced searching:

1. Click in the list of codes.
2. Click the binoculars on the toolbar.



3. Type the characters and set the options.

Where:

Match case	Only find items that match the capitalization.
Global Search	Continue searching the codes for other elements if the search value is not found in this element's codes.

Code Value ID	Search the ID column only.
Code Value	
Definition	Search the Value Definition column only.
Both	Search the ID and the Value Definition columns.

4. Click Find Next.

Saving Files

File | Save or **File | Save As** takes just a minute and can save you hours. Use it liberally while working in Standards Editor. Don’t wait until you finish.

Quick Tour of Standards Editor

Tour Overview

In this tour, we'll build a customized X12 guideline.

Open Standards Editor by choosing **Start | Programs | *<TIBCO_HOME>* | EDISIM | Standards Editor**.

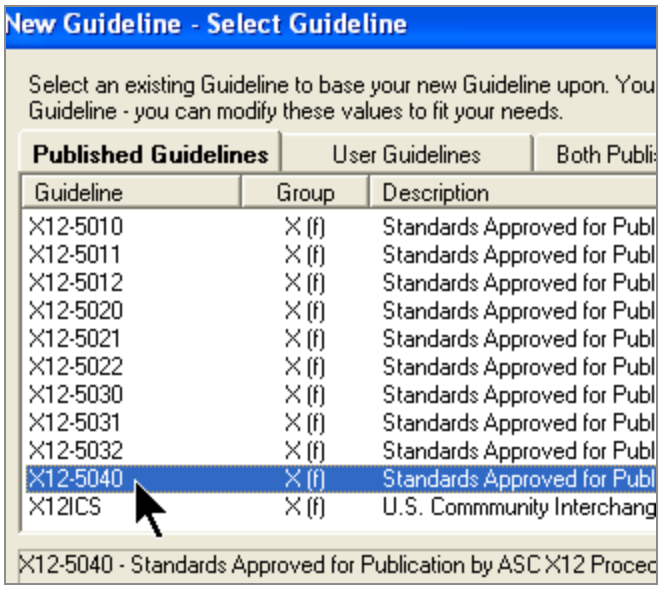
If Standards Editor does not fill the entire screen, maximize it by double-clicking on the Standards Editor title bar.

We'll create our own version of an ASC X12 005040 Purchase Order.

Standards Editor lets you make many types of changes. In general, you should not violate the rules established in the published standard on which your guideline is based. Any data conforming to your guideline should also conform to the underlying standard.

Choosing a Standard

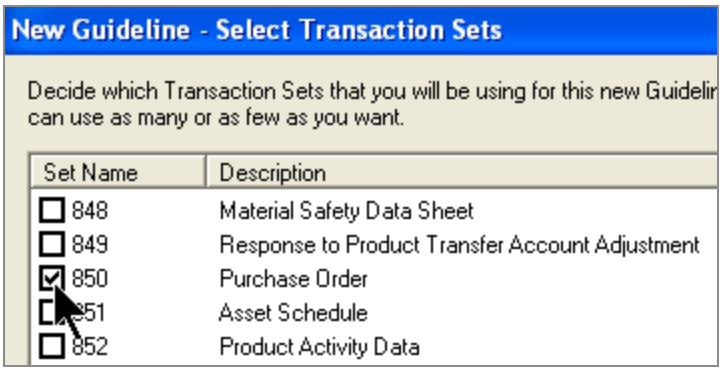
1. If you see a popup asking if you want to start a new guideline or open an existing guideline or standard, click **OK** without selecting any of the links.
2. Click **File | New** and select the Published Guidelines tab.
3. **Select X12-5040.**



4. Choose **Next**.

Choosing a Transaction Set

1. From the Select Transaction Sets box, choose 850.



2. Click **Open**.

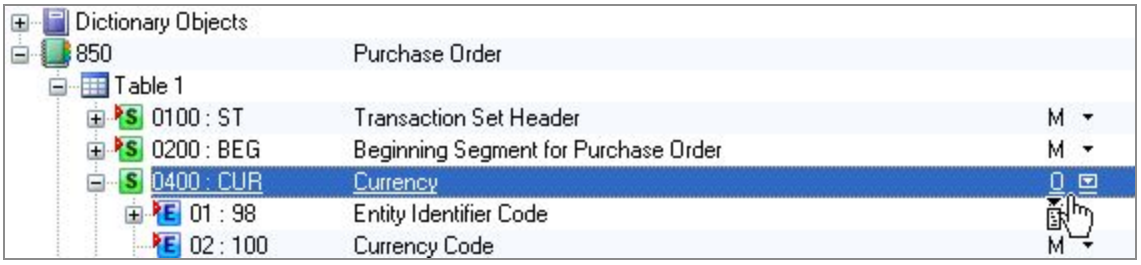
You can now see the X12-5040 dictionary and the 850 transaction set.

3. Click the **+** signs next to **850**, **Table 1**, and **CUR**. Click on the **CUR** segment.

Marking Segments as Not Used

First, we want to mark as unused any segments that we do not allow.

1. **0400:CUR** is the first segment that we don't want to use. Look across the pane and find the **Req** (Requirement) column. It has an **O** in it, indicating that X12 considers it Optional.



This means that we can set its usage.

2. With CUR selected, press *Alt*+**m** or choose **Edit | Mark Used/Not Used**.

The CUR segment is faded and an **N** appears in the U/A (User Attributes) column. If the CUR disappears, click **View | Show Unused**.

3. Scroll down and expand the first **N1** loop.

4. Click on the **IN2** segment at position 3250 and press *Alt*+**m**.

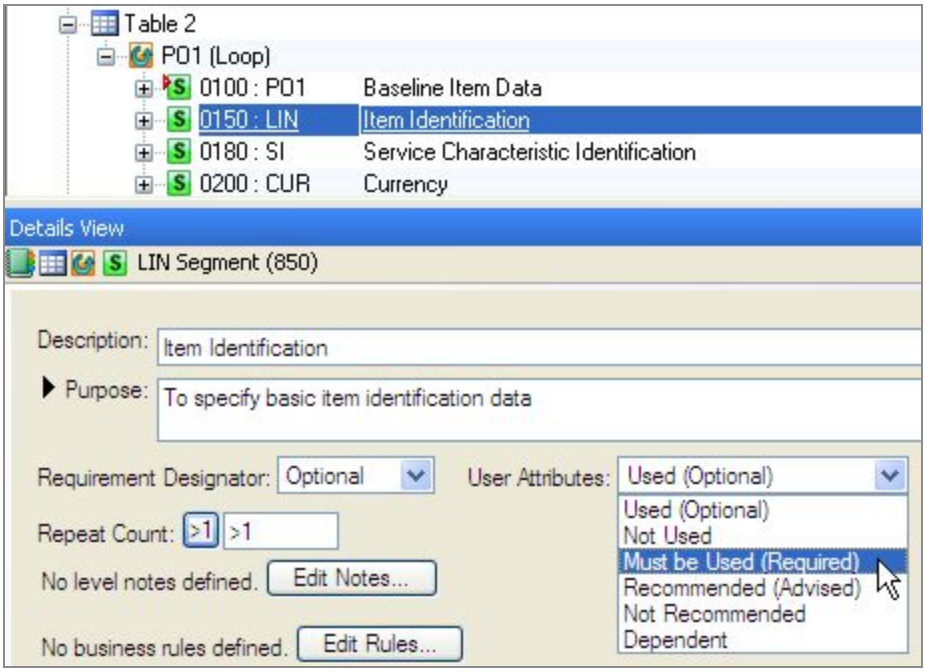
Marking Segments as Must Use

You can also require segments that X12 considers optional.

1. Expand **Table 2** and its **PO1** loop.
2. Select the **LIN** segment at 0150.

It is optional according to X12 required by our company.

3. In the bottom pane, be sure that the **Detail** tab is selected.
4. From the drop-down User Attributes list, select **Must be Used (Required)**.

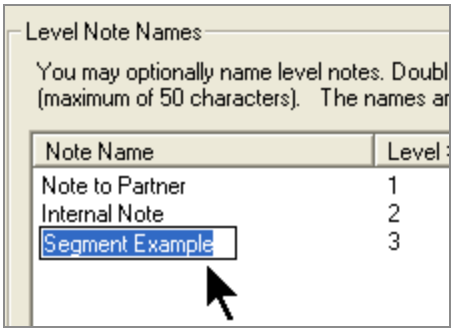


Saving and Setting up Note Levels

To save the work we've done so far:

1. Choose **File | Save As**.
2. For Name, type **MY_5040_Purchase_Order**. Avoid spaces and special characters except hyphens and underscores.
3. For Description, type My company's X12-5040 Purchase Order.

4. Click **Properties** at the bottom right.
5. On the **Level Notes** tab, click slowly on **<not defined yet>** and name each note level like this:

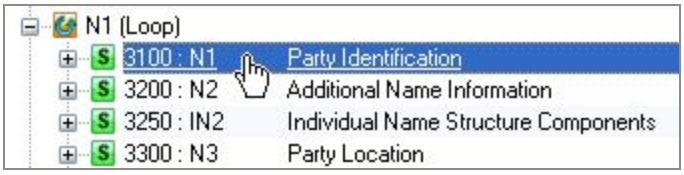


6. Click **OK** and then **Save**.

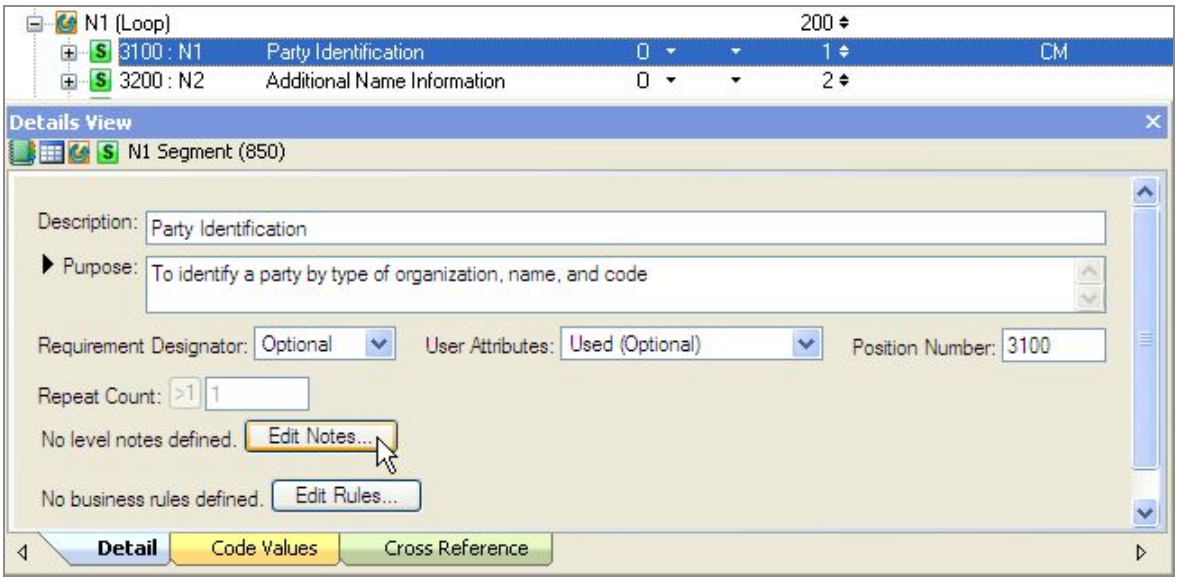
   Look at the title bar for the guideline name.

Inserting Notes for Trading Partners

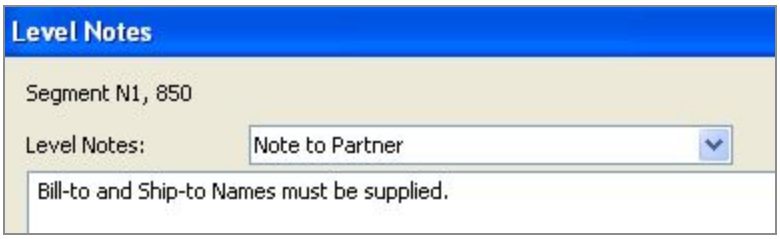
1. Expand the N1 Loop and click on the N1 segment at position 3100 in Table 1.



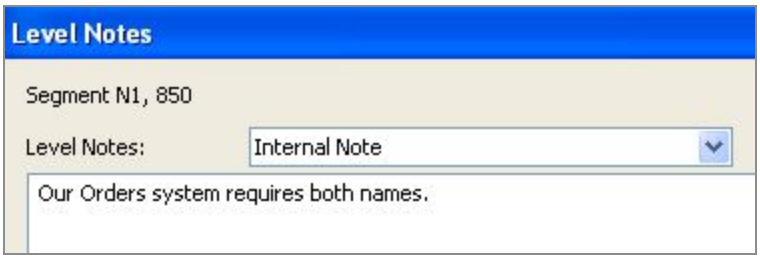
2. On the bottom detail pane, click **Edit Notes**.



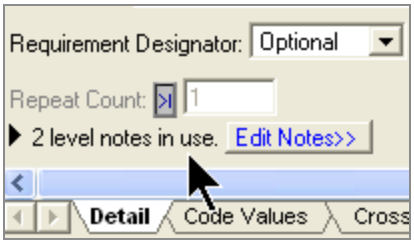
3. With **Note to Partner** selected, type Bill-to and Ship-to Names must be supplied.



4. Select **Internal Note** from the drop-down list and type Our Orders system requires both names.



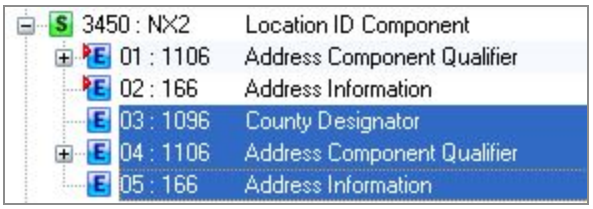
5. Click **OK**. The Edit Notes area in the bottom pane now says **2 level notes in use**.



Working with Elements

There are some elements that we do not want partners to send to us.

1. Open segment **NX2** at position 3450 in Table 1 (within the N1 loop).
2. Select elements at position 03-05.

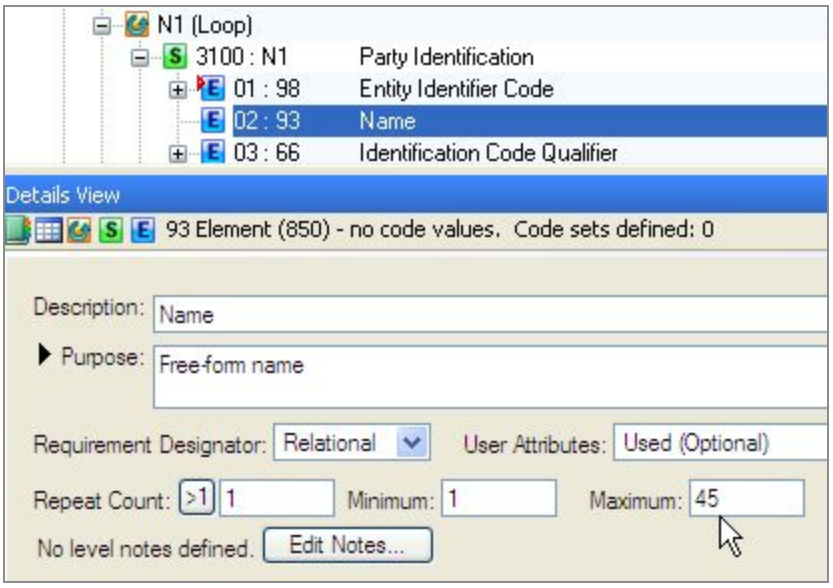


3. Use *Alt*+**m** to mark them unused.
4. We only allow 5 N1 loops here.

Click on the number in the **Repeat** column for the N1 loop and change it to **5**.

Be sure that you are on the N1 *loop*, not the N1 segment.

5. Now, open the **N1** segment and change the maximum length of the N1-02 element to 45.

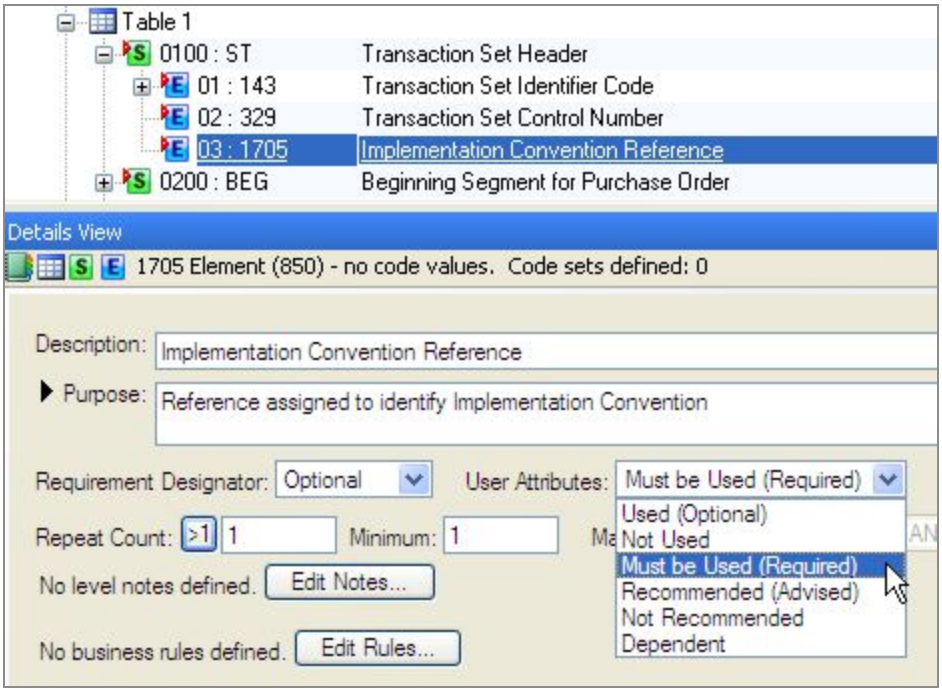


As you click on different lines in the top pane, the bottom pane and its title bar update accordingly. The bottom title bar displays icons showing your depth. You can change the same properties of elements in the top and bottom panes.

6. Scroll up and open the **ST** segment at the very top of Table 1.

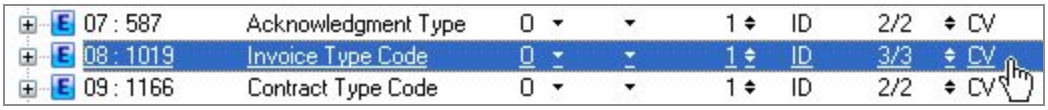
Click on the element at **ST-03** and change its user attributes to **Must be Used**.

It is optional according to X12, but we require it. Your guidelines will always be more specific than the standard.



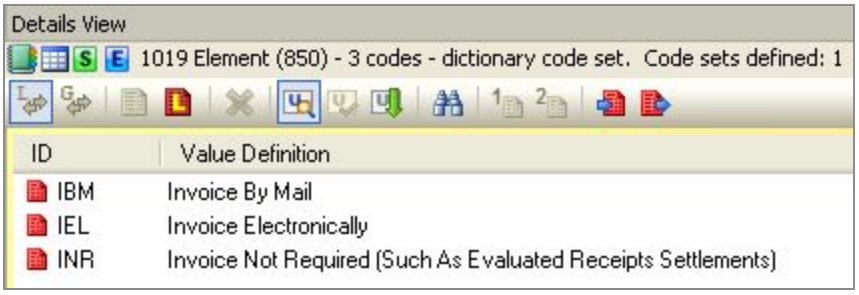
Checking Code Values

1. Click on the BEG segment's element at position 08 **- 1019-Invoice Type Code**. The Indicators column for this element contains **CV**, signifying that there are code values attached.

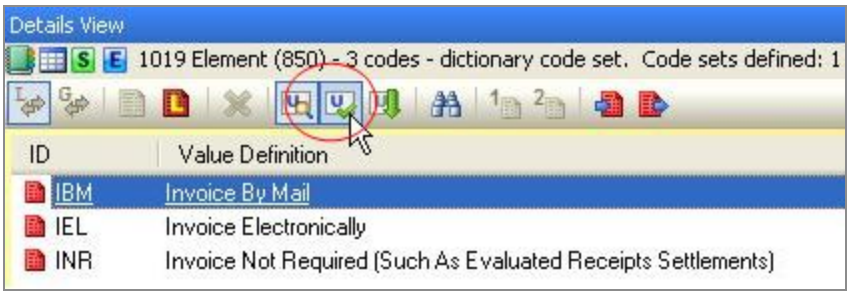


2. Click the **Code Value** tab at the very bottom of the lower pane to see this element's

allowed values.

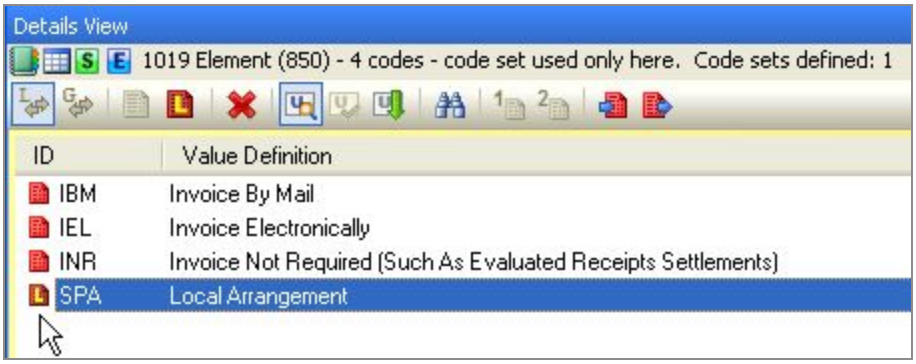


3. To mark **IBM** as unused, type *Alt*+**m**. The code values toolbar also has a button for Mark Used/Not Used.



4. To add a local value (one that is not in the X12 list), click on the Local Value button on the code values toolbar, type **SPA** for its ID, press *Tab*, type **Special Arrangement** for its Value Definition, and press *Enter.* Notice the SPA code with the L in its icon.

Your Code Value pane should now look like this:



The toolbar button controls whether unused codes are displayed or hidden.

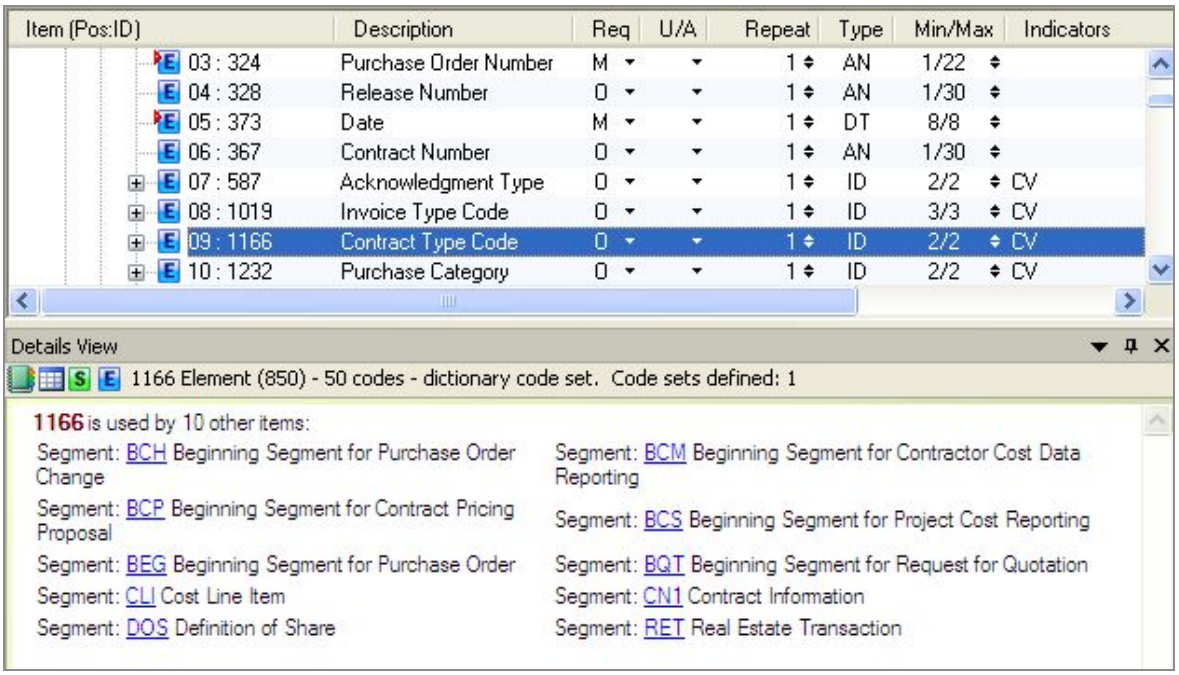
Changes to values are stored in a *code set* that can be reused elsewhere.

Cross Referencing

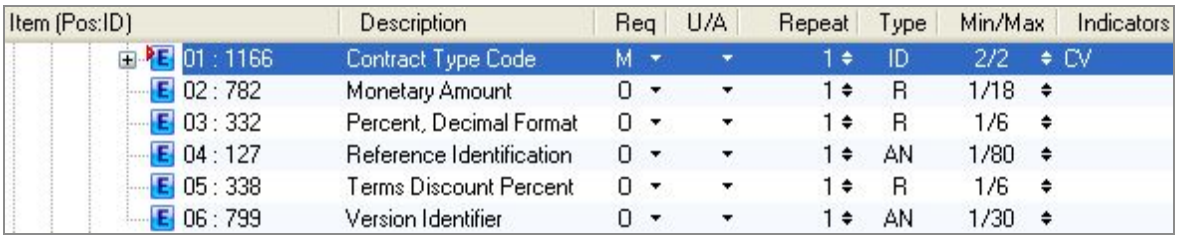
The Cross Reference tab on the bottom pane lets you quickly see where objects in the top pane are used:

1. Click on the **BEG-09**, element 1166 Contract Type Code.
2. Select the **Cross Reference** tab.

   You will see a list of every place this element occurs in X12-4030, complete with links to take you to the other locations:



3. Click the **CN1** Contract Information link. Standards Editor jumps to that segment in the Segment Dictionary and displays the generic dictionary 1166 element:



4. Highlight element 1166 and select **Edit | Jump up 1 Level** to go to its segment.
5. Use the back button  on the main toolbar until you return to the BEG segment in

the 850 transaction set.

Saving the Finished Guideline

Choose **File | Save**.

Previewing your Guideline

To preview a printable guideline document of this guideline in Doc Builder:

1. Click the Doc Builder toolbar button  .
2. Click **OK** in the box informing you that you will be using a copy of the current guideline.
3. Click  a few times to advance to other pages.
4. Use the scroll bar to view the current page.
5. When finished, exit **Doc Builder**.

See the Doc Builder manual for more details.

Backing up Your Database

Exit Standards Editor.

Open **Windows Explorer** and locate the file containing your saved guideline (**MY_5040_PURCHASE_ORDER.std**) in EDISIM's **User Files\Public Guidelines** directory.

Copy this file (and any others you want) to a network drive or another drive that gets backed up.

Another way to back up is to open the guideline in Standards Editor and use **File | Export | Export Current Guideline | To SEF**.

Modifying the Guideline

If you later decide to change the new guideline, choose **File | Open** or choose it from the bottom of the File menu.

Using Your Guideline

You can use your new guideline in:

- Test Data Generator - to develop test data based on the new guideline.
- Doc Builder - to get a formatted guidelines document of a transaction set.
- Analyzer or EDISIM Validator- to analyze test or production data for compliance to the new guideline.
- Comparator - to compare two transaction sets or messages and to migrate changes you have made.
- Standards Reference - to view details about a transaction (a read-only Standards Editor).
- All other TIBCO Foresight products - TIBCO Foresight® HIPAA Validator® Desktop, TIBCO Foresight® Community Manager®, TIBCO Foresight® Instream®, TIBCO Foresight® Transaction Insight® and TIBCO Foresight® Translator.

You can also merge it with HIPAA guidelines.

You can quickly access the EDISIM components from within Standards Editor using the icons on the upper toolbar:

From left to right:

- Analyzer
- Validator
- Comparator
- DocBuilder
- Test Data Generator

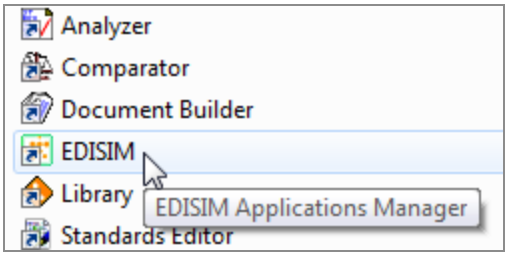
- HIPAA Validator
- GuideMerge
- TIBCO Foresight® Translator (if purchased).

New Guidelines

Any of these methods will open Standards Editor:

- If using the Application Manager, click the Standards Editor icon: 

- Use **Start | All Programs | *<TIBCO_HOME>* | EDISIM | Standards Editor**.
- From Windows Explorer, double-click on FSEditor.exe in EDISIM's Bin folder.



- Open the EDISIM group on your desktop and double-click on Standards Editor.

Where do Standards, Guidelines, and MIGs come from?

Standards and Industry Guidelines

EDISIM's installation program offers all X12 and EDIFACT standards, GENCOD, TRADACOMS, ODETTE, and industry guidelines like VICS, UCS and HIPAA.

Updates can be downloaded from the TIBCO Product Support file transfer server using your username and password for the TIBCO Support Web:

http://mft.tibco.com/cfcc/login/login.jsp

Guidelines and MIGs

You can:

- create guidelines and MIGs with Standards Editor or Comparator.
- import them from someone else's export from EDISIM.

- copy files containing guidelines and MIGs from other users.
- create guidelines and MIGs from EDI data with Docstarter (see **TIB_fsp_edisim_n.n.n_docstarter.pdf**).

EDISIM's installation program offers some sample guidelines and MIGs. If these do not appear in your list, you can use **File | Import | Import Single .SEF and Open**, and import them from EDISIM's Addlstds folders:

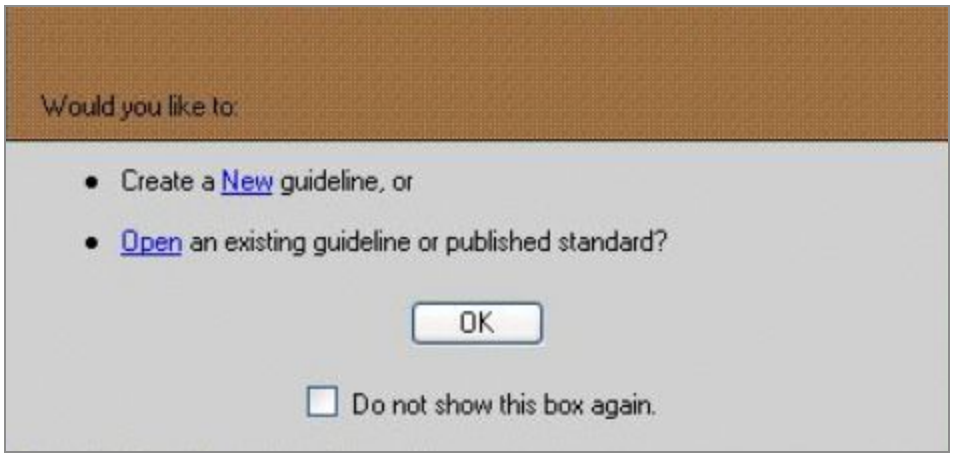
SAMP1	X12 4010 invoice and purchase order built from VICS industry standards.
SAMP2	EDIFACT D96A invoice and purchase order built from EANCOM97.
CLASS850	X12 3070 invoice and purchase order.
MYORDERS	EDIFACT D96A purchase order. HIPAA guidelines.

Setting Up a New Guideline or MIG

Choosing a Standard and Transaction Set or Message

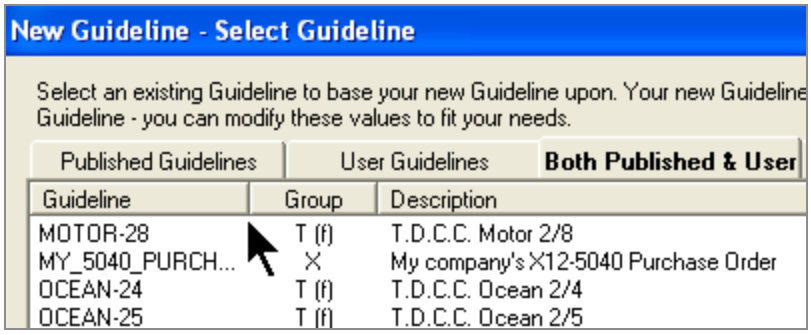
1. From within Standards Editor, choose **File | New** or use the  button to *start a new* guideline or MIG—one that has never been saved before.

You can also do so by choosing New from the welcome screen:



This opens a tabbed dialog listing standards and guidelines.

2. Adjust the dialog columns by dragging the splitters in the header:

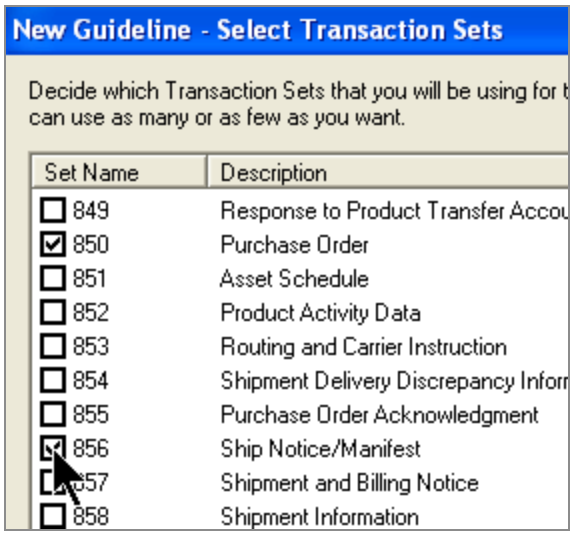


3. Highlight the standard you want to use as a foundation for your guideline.

If you don't see it, select **Both Published & User** tab, which lists all standards and guidelines.

4. Click **Next**.
5. Select each transaction set or message that is to be included by clicking in its check box.

To clear a selection, click the check box again.



This box will be empty if the base does not contain at least one transaction set or message (if it consists entirely of a dictionary, such as X12ICS and UN1ICS). In this case, continue by pressing Open and then choose OK to the confirmation prompt.

6. Click **Open** and your new guideline displays in the top pane. Click the plus sign in front of a transaction (or message) to expand it.

Saving a Guideline

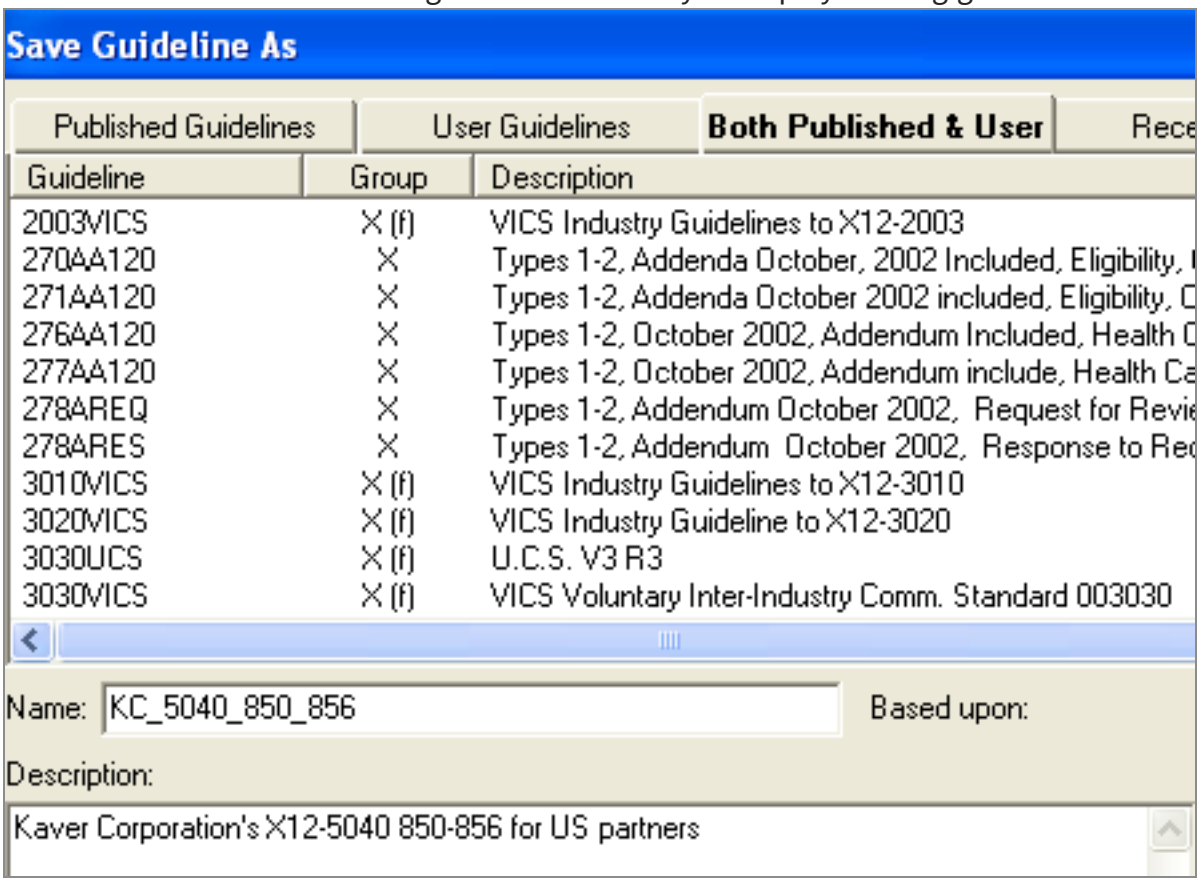
Saving lets you name your guideline and set its properties.

Best practice Have a company-wide naming convention.

To save:

1. Select **File | Save** or click the Save toolbar button  .

The **Save Guideline As** dialog has tabs that let you display existing guidelines.



2. Type a unique name.

Guideline names:

- Can contain up to 128 characters
- Can contain underscores and hyphens
- Cannot contain these special characters: " * , / \ : < > ? | *space*

Naming considerations:

- HIPAA customers should make sure that they are using version 6.1.0 or later before they attempt to use standards with names longer than eight characters.
- Customers using TI 3.2 and earlier should not use standards with names longer than 50 characters.

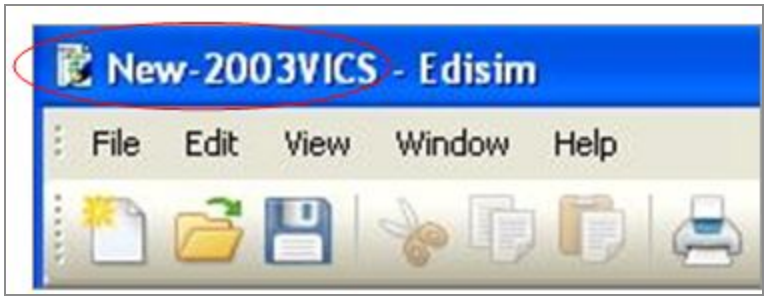
3. Type a description.

This is important because it will appear in all lists of guidelines throughout EDISIM and all other TIBCO Foresight products.

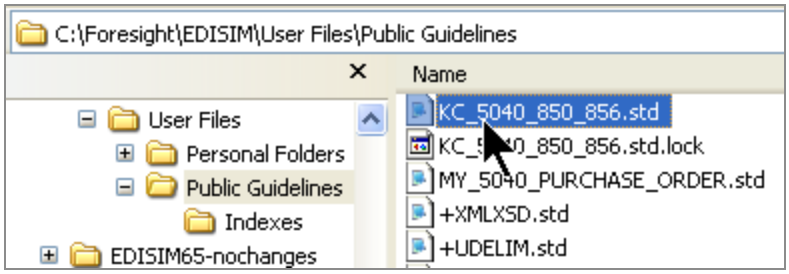
You can either:

Choose **Save**

You will see the new guideline name in Standards Editor's header:



… and the guideline is saved to EDISIM's User Files\Public Guidelines directory:



Choose Properties to add more setup information.

See Guideline Properties for details.

Guideline Properties

To set properties for a guideline:

1. Open the guideline.
2. Open the Properties box by choosing:

   File | Save As | Properties.

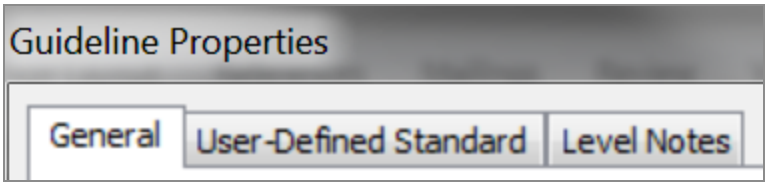
   Or …

   File | Properties.

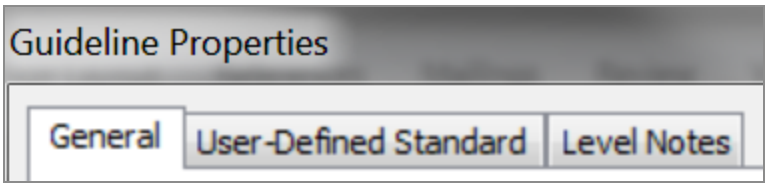
The box always has these tabs: General Guideline Properties and Level Notes.

A third tab in the middle is populated based on the type of guideline being used. It may be labeled:

- User-Defined Standard (as in this example) or
- XML Schema.



General Guideline Properties



Under **File | Properties | General** tab, you can change the guideline's Description, Version, Release, Industry Identifier Code, and designate how you want to handle the enveloping.

Caution Leave the Version, Release, and Industry Identifier Code values as they are unless you are on a standards board or are developing a new guideline or MIG for a particular industry.

Description

This field initially has the description from the base standard. We recommend that you customize the description, since you will then be better able to distinguish one guideline or MIG from another. This description is used wherever EDISIM lists guidelines or MIGs. Maximum length is 100 characters.

Version/Release/Industry Identifier (VRI) Code

The Version, Release, and Industry Identifier Code are prefilled with values from the base standard. If this information is not available the fields are blank.

For X12	Version and Release are usually 3 digits. If present, Industry Identifier Code is up to 6 alphanumeric characters. Together, these three fields are placed in Element 480 in the GS (group header) segment.

For EDIFACT	Version and release are both usually 1-3 alphanumeric characters. Example: D93A has version D and release 93A. UN-921 has version 92 and release 1. These fields are in the UNH and UNG segments.
For TRADACOMS	By default, version is 1 and Industry Code is ANA (Article Numbering Assn.). Since there is no release, this field is set to 0 (zero).

EDISIM VRI Usage

This value is used by these EDISIM components:

Doc Builder	Shows the VRI in the footer (where you can override it) and wherever the data refers to the VRI.
Test Data Generator	Places it in the test data wherever the VRI should appear. By default, this is in the GS (X12) or the UNH (EDIFACT).
Analyzer	Should use the profile setting **Ask for Standard Name** if you change the VRI. Otherwise, it may compare against the parent standard rather than the one you created. Analyzer expects this VRI in the

GS or UNH segment.

If you do change the VRI, create a consistent naming scheme, and make each standard's VRI unique.

Interchange Envelope Segments Area

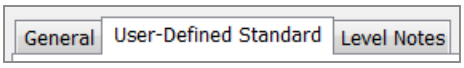
This lets you specify the enveloping that Analyzer will use when checking data against this guideline or MIG. It has no other effect.

Your options are described in What to Do About Enveloping.

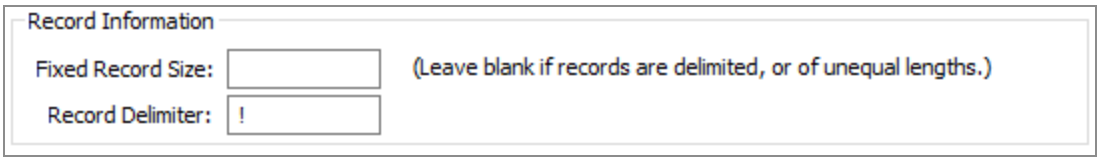
User-Defined Standard Properties

If the **File | Properties | User-Defined Standard** tab appears, you can change the guideline's Record Information, Field Information, and Enveloping. Information will be

prefilled with values from the base standard where possible.

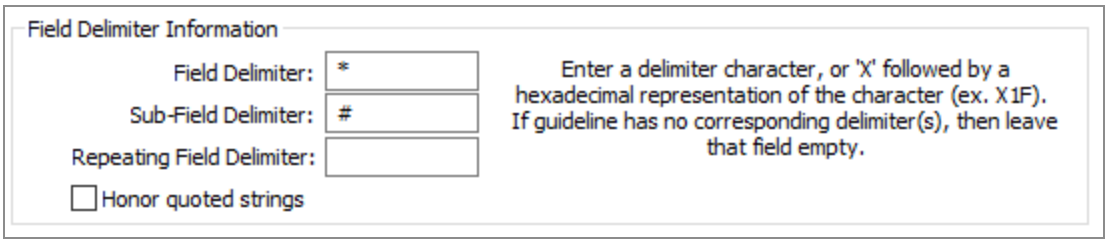


Record Information Area



Fixed Record Size	Defined fixed record size, if applicable. Leave this field blank if records are delimited or of unequal lengths.
Record Delimiter	The character that terminates each record. This can be a delimiter character or an ‘X’ followed by a hexadecimal representation of the character such as ‘X1F’. If the guideline has no record delimiters, leave this field empty.
Record Key Size	Length of the record key. If there is no record key (such as single record layout) enter 0.

Field Delimiter Information Area



NOTE: If your layout is a fixed-length type, these fields can be left blank.

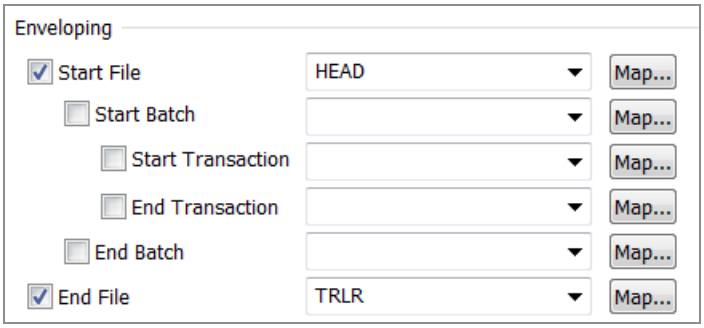
Field Delimiter	The character used between fields. This can be a delimiter character or an ‘X’ followed by a hexadecimal representation of the character such as ‘X1F’. If the guideline has no field delimiters, leave this field empty.

Sub-Field Delimiter	The character used between sub-fields. This can be a delimiter character or an ‘X’ followed by a hexadecimal representation of the character such as ‘X1F’. If the guideline has no sub-field delimiters, leave this field empty.
Repeating Field Delimiter	The character used between repeating fields. This can be a delimiter character or an ‘X’ followed by a hexadecimal representation of the character such as ‘X1F’. If the guideline has no sub-field delimiters, leave this field empty.
Honor quoted strings	When checked, Editor will set the 'QD' option in the guideline file's .STD line during Save.

Record Key Information Area

No Record Keys	Check this box if the record has no record keys (i.e., every record in your data file has the same layout).
Record Key Size	Length of the record key. If there is no record key (such as single record layout) enter 0.
Record Key Start	Column number (1-based) where the record key starts.
Control Record Key Size	Length of special control records at the beginning and/or end of a guideline, if different from Record Key Size entry.
Control Record Key Start	Column number (1-based) where the special control record key starts, if different from Record Key Start entry

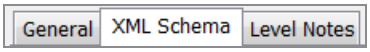
Enveloping Area



This area is for future use.

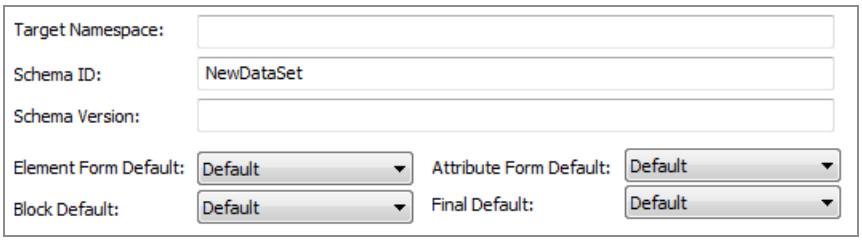
XML Schema Properties

If the **File | Properties | XML Schema** tab appears, you can specify information about your schema. Information is pre-populated with values from the schema when possible.



XML Schema Properties vary. Refer to your schema documentation for information about the appropriate settings for your schema. You can also consult publically available web standards information such as http://www.w3.org/standards/xml/schema.

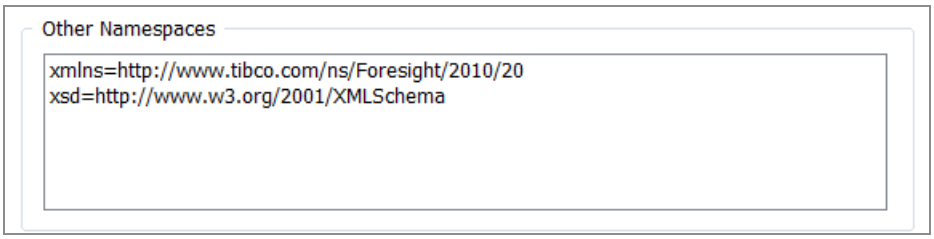
Target Namespace and Schema Information Area



Target Namespace	Represents the target namespace of the schema (optional). Double click the entry to edit.
Schema ID	Optional field used to identify the schema.

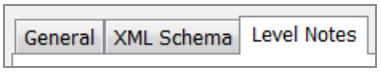
Schema Version	Optional field used to identify the schema version.
Element Form Default	Options: Default, Qualified, Unqualified
Attribute Form Default	Options: Default, Qualified, Unqualified
Block Default	Options: Default, All, Extension, Restriction, Substitution
Final Default	Options: Default, All, Extension, Restriction,

Other Namespace Information Area



Other Namespaces Double click the entry to edit.

Level Notes Properties

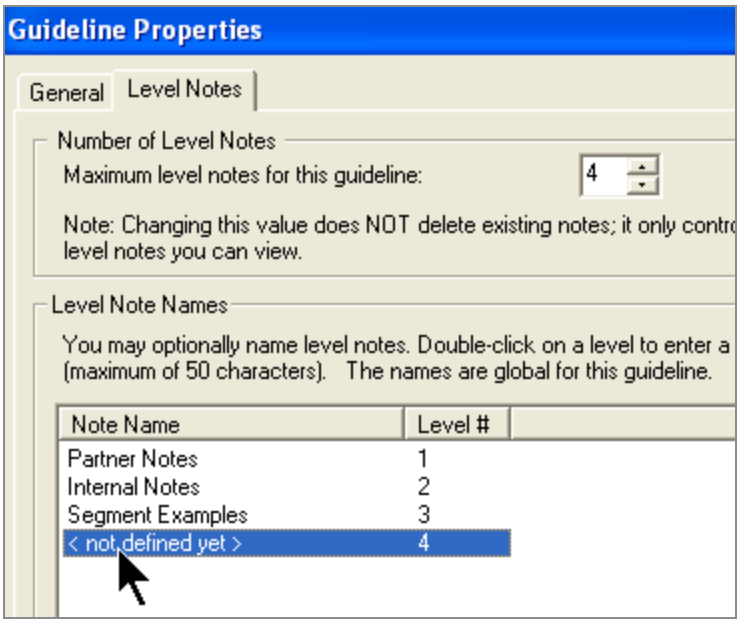


Under **File | Properties**, the **Level Notes** tab lets you:

Set the number of levels of notes that will display in this guideline. Type the number or use the arrows. The Maximum is 100. Reducing the number does not delete existing notes.

Name each level, if you wish. Click on **<not defined yet>** and type the label that you want to appear in the notes box and in Doc Builder output.

This example specifies that 4 levels of notes should appear, and names the first three. Notice the Level # column.



In Doc Builder, you can print any combination of note levels.

Best practice Use the same levels and level names for all guidelines company-wide.

How Many Transaction Sets or Messages in a Guideline?

Your guideline or MIG can include multiple transaction sets or messages.

Considerations:

- You can copy a transaction set or message from one guideline or MIG to another, as long as they are based on the same standard.
- You can add a transaction set or message from the underlying standard to an existing guideline or MIG.
- You can delete unwanted transaction sets and messages from existing guidelines or MIGs.
- If you make global changes in the dictionary, they will apply to all transaction sets or messages in the guideline or MIG.
- For network installations of EDISIM, only one person at a time can open a guideline or MIG with Standards Editor or Comparator.

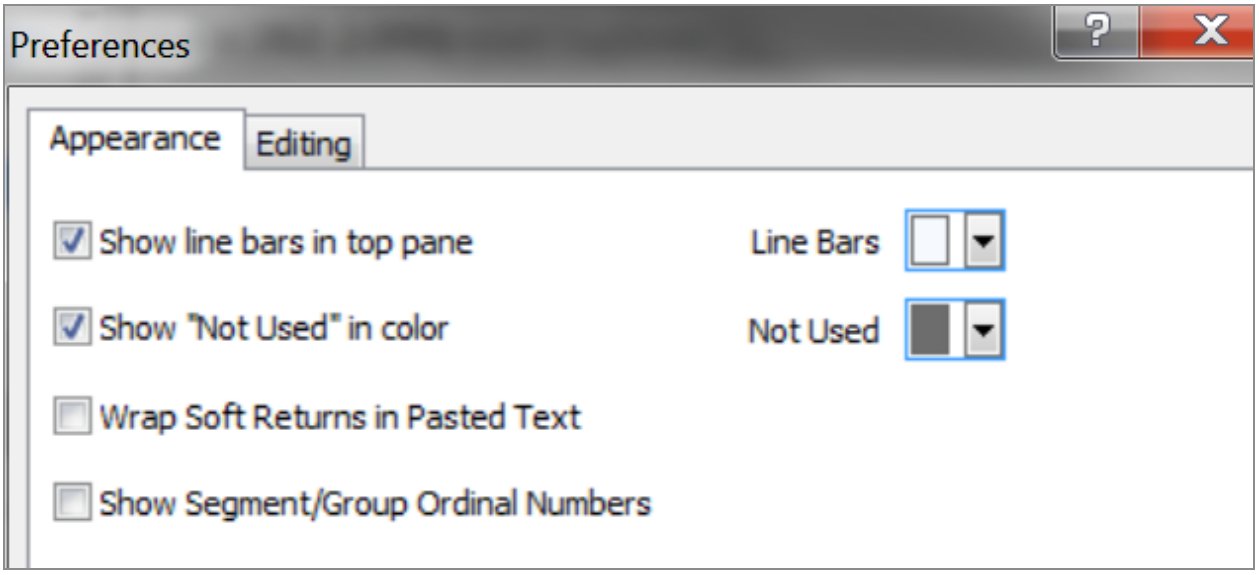
With multiple transaction sets or messages in the same guideline or MIG, be careful about unintentionally overwriting changes.

Example: A guideline or MIG contains a purchase order and an invoice. One person edits the purchase order while another person edits the invoice. If the invoice editor gives his SEF file (which contains both documents) to the purchase order editor, the changes to the purchase order will be overwritten. If the purchase order editor gives her SEF to the invoice editor, changes to the invoice will be overwritten.

Preferences

Choose **File | Preferences** to set up global preferences that work whenever you use Standards Editor.

Appearance Tab



The **Appearance** tab lets you:

Show line bars in top pane
This option controls whether separation bars appear between lines in the top pane. You can disable these lines with the checkbox, or change the color with the **Line Bars** list box.

Show "Not Used" in color
This lets you change the color of items that have been marked as not used. The default is light gray. You can change this with the **Not Used** list box.

Wrap Soft Returns in Pasted Text

Prevents odd line breaks in Doc Builder output. If this option is selected, single line breaks in pasted text are converted to single spaces, and two consecutive line breaks become paragraph breaks.

Show Segment/Group Ordinal Numbers

Displays ordinal numbers assigned to segments.

If box is checked:

If box is not checked:

Editing Tab

The **Editing** tab lets you:

- Select the delay for updating the bottom pane when an item is highlighted in the top pane.
- Choose whether you can violate an element's length.
- Determine whether a single click will let you edit an item such as a description.

Opening a Standard

To start a new guideline or MIG, use **File** | **New** rather than **File** | **Open**. See Setting Up a New Guideline or MIG for details.

To *modify* a guideline or MIG that already exists:

Choose File | Open. If you cannot find it, choose the Both Published & User tab.

Or …

Select it from the bottom of the **File** menu if you opened it recently.

Best practice Generally, it is not appropriate to open TIBCO Foresight-supplied standards because you will not get a chance to choose particular transactions sets or messages and you cannot overwrite them.

Opening Multiple Guidelines

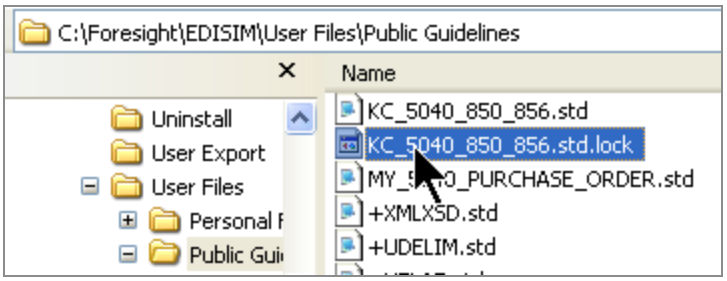
You can work with two or more guidelines or MIGs simultaneously, and adjust your screen so that you can see at least parts of both.

Troubleshooting when Opening or Creating New Guidelines or MIGs

Informational message: Standard is already in use

Standards Editor must have write access to a guideline or MIG. If you try to use one that is open in another EDISIM module or by another user, you will see an informative message. This feature protects guidelines from being written by multiple sources at once.

If you are *sure* that no one is using the standard, you can delete the *guidelinename*.lock file in your User Files\Public Guidelines folder so that the guideline or standard can be opened:



Error message: Failed to open document “xxx.sef”

The TIBCO Foresight-distributed standard, guideline, or MIG that you are trying to access is based on another standard, guideline, or MIG that EDISIM cannot find. For example, 4020VICS is based on X12-4020. EANCOM93 is based on EDIFACT D93A.

This means that the standard is not installed. To remedy this, run the EDISIM installation program, choose the custom installation, and select the standard.

If some transaction sets or messages lack names

If the name of a transaction set or message is missing, do not worry - it may be that you are using an older standard. Some older standards use text descriptions from newer standards. If these newer standards do not have a certain transaction set or message, then the name area will be blank.

If *all* transaction sets or messages lack names, call TIBCO Foresight Technical Support.

If you don’t see the dialog listing transactions or messages

If you *open* an existing guideline or MIG, you will go directly to the editing screen without stopping to choose individual transaction sets or messages.

When *starting a new* guideline or MIG, always use **File** | **New** or the  toolbar button.

Can't Find a Standard, Guideline, or MIG?

All published standards are shipped with each new release of EDISIM.

To install a new standard:

1. Rerun the installation program and select the desired standard.
2. New standards can be downloaded from the TIBCO Support Web:

http://mft.tibco.com/cfcc/login/login.jsp

If you cannot find a standard that you believe you should have:

Make sure the standard file (.STD or .STF) is in EDISIM’s Static or User Files\Public Guidelines folder.

Did you rename the file? The filename should end with .STD or .STF. Since Standards Editor reads the standard, guideline, or MIG name from within the file, renaming the file does not rename what appears in lists within Standards Editor.

Did you get it from somewhere else? If so, use Export and Import for guidelines and MIGs, as described in Exporting Guidelines and MIGs. Use the installation program for TIBCO Foresight-supplied standards.

Do you have two versions of EDISIM on your PC?

Has EDISIM been moved? If so, check paths in EdisimBaseSettings.ini in EDISIM's Bin folder.

Backups

How much work are you willing to lose in case of a hardware or software problem? The answer to this question should determine the frequency of your backups.

It is very important to back up each important guideline or MIG that you create or modify. Do not skip this step to save time. These guidelines and MIGs are crucial to all parts of EDISIM, as well as to other TIBCO Foresight products like HIPAA Validator® Desktop, Instream®, and Transaction Insight®.

EDISIM has a Backup folder under its main directory. You can create subfolders with unique names to store your backups. Simply copy files from your EDISIM\User folders to the new backup folders.

Make sure you also back up these files to a network drive, CD, or other location off your own PC's hard drive.

You do not need to back up TIBCO Foresight-distributed standards. They are available through the installation program.

Sharing Guidelines

Network Installations of EDISIM

A network installation of EDISIM is an excellent way to share guidelines among EDISIM users in your organization. EDISIM protects the shared database by allowing only one user at a time to write to a particular guideline or MIG. However, others can read it while it is being updated.

Standards Editor is a "writer" and therefore can only open a guideline if it is not already in use.

However, if you have opened the guideline in Standards Editor:

- Others can use it with Document Builder, Analyzer, Test Data Generator, and Standards Reference. These modules do not write to the database.
- Others can use it as the base guideline for Comparator, but not the target.

Exporting Guidelines and MIGs

Rules for Exporting

The purpose of a SEF export is:

- To share a guideline with another EDISIM user
- To create a SEF file that can be imported into a translator
- To back up a guideline

A document explaining the SEF format is available from TIBCO Foresight Technical Support.

The purpose of an XML Schema export is:

- To obtain an XML schema for use with other products
- To prepare data for translation with TIBCO Foresight's Translator product.

Limitations on exporting

- Published X12 and EDIFACT standards cannot be exported.
- You must save all changes before exporting
- For SEF files, the recipient must have the same or a newer version of EDISIM, as well as the guideline or MIG's underlying standard. For details, please see Do I Have the Base Standard?.

How to Export to SEF

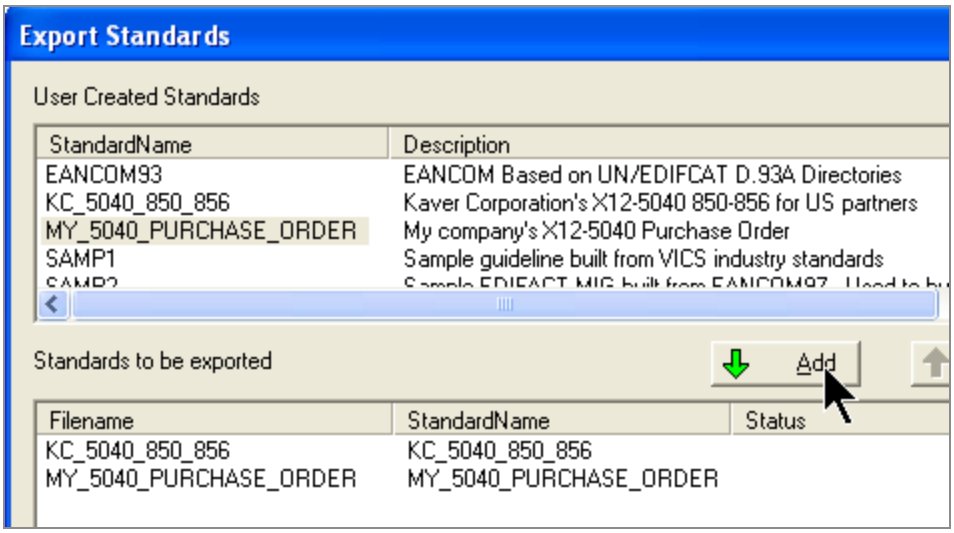
Exporting a Single Guideline or MIG

To export a guideline or MIG that is open in Standards Editor:

1. Save changes.
2. Choose **File | Export | Export Current Guideline | To SEF**.
3. Choose a folder and name for the export file.

Exporting Multiple Guidelines

1. Choose **File | Export | Export Multiple Guidelines | To SEF**.
2. In the top area, select the guidelines and MIGs that you want to export and click **Add**. To select multiple lines and then add them all at once, use *Ctrl+click* and *Shift+click*.



Added guidelines appear at the bottom. To remove an entry from the bottom, highlight it and click **Remove**.

Each guideline or MIG will go into a separate file with extension .SEF. For example, guideline MY4010PO will go into file MY4010PO.SEF.

1. Type or browse to the output folder.
2. Select **Overwrite existing File(s)** if you want to overwrite existing files during the export.
3. Otherwise, the file is not exported if one by the same name already exists, and the Status column alerts you.
4. Click **Export**. The Status column reports progress.

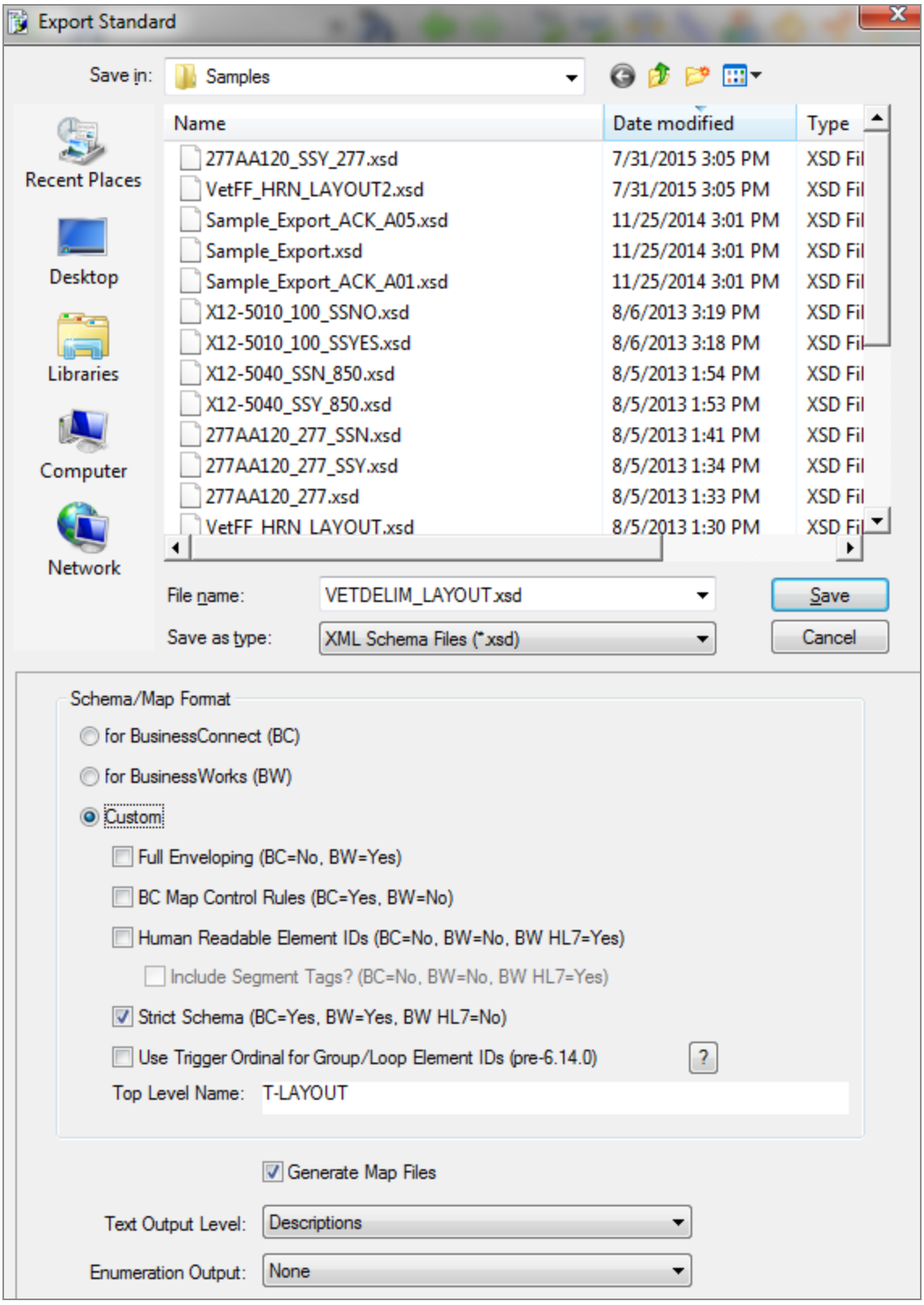
Hints

- If nothing appears to happen when you click Export, files of those names may already exist.
- If the Status column shows “Export Failed!!,” check the path to be sure it exists and that you have write access to it.
- Before e-mailing an export file, please see Correcting SEF File Parameters during Import.
- To export a large number of guidelines or MIGs, start at the end of the day. A mass export can take a long time.

How to Export to an XML Schema File

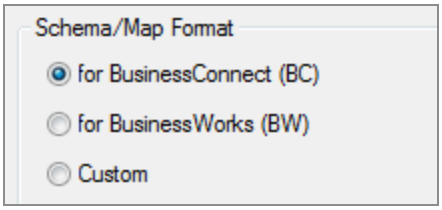
Any EDI or Flat File guideline can be exported as an XML Schema file.

1. From a transaction set or message within a guideline:
2. Choose **File | Export | Export Current Guideline | To Schema...**


Export Standard
Save in:
Samples
Recent Places
Desktop
Libraries
Computer
Network
Name
Date modified
Type
277AA120_SSY_277.xsd 7/31/2015 3:05 PM XSD Fil
VetFF_HRN_LAYOUT2.xsd 7/31/2015 3:05 PM XSD Fil
Sample_Export_ACK_A05.xsd 11/25/2014 3:01 PM XSD Fil
Sample_Export.xsd 11/25/2014 3:01 PM XSD Fil
Sample_Export_ACK_A01.xsd 11/25/2014 3:01 PM XSD Fil
X12-5010_100_SSNO.xsd 8/6/2013 3:19 PM XSD Fil
X12-5010_100_SSYES.xsd 8/6/2013 3:18 PM XSD Fil
X12-5040_SSN_850.xsd 8/5/2013 1:54 PM XSD Fil
X12-5040_SSY_850.xsd 8/5/2013 1:53 PM XSD Fil
277AA120_277_SSN.xsd 8/5/2013 1:41 PM XSD Fil
277AA120_277_SSY.xsd 8/5/2013 1:34 PM XSD Fil
277AA120_277.xsd 8/5/2013 1:33 PM XSD Fil
VetFF_HRN_LAYOUT.xsd 8/5/2013 1:30 PM XSD Fil
File name:
VETDELIM_LAYOUT.xsd
Save as type:
XML Schema Files (*.xsd)
Save
Cancel
Schema/Map Format
for BusinessConnect (BC)
for BusinessWorks (BW)
Custom
Full Enveloping (BC=No, BW=Yes)
BC Map Control Rules (BC=Yes, BW=No)
Human Readable Element IDs (BC=No, BW=No, BW HL7=Yes)
Include Segment Tags? (BC=No, BW=No, BW HL7=Yes)
Strict Schema (BC=Yes, BW=Yes, BW HL7=No)
Use Trigger Ordinal for Group/Loop Element IDs (pre-6.14.0)
?
Top Level Name:
T-LAYOUT
Generate Map Files
Text Output Level:
Descriptions
Enumeration Output:
None

3. Choose a folder and name for the exported file.
4. Select Schema/Map Format Options as options as needed. Refer to section Schema/Map Formatting Options (below) and when done, continue with Step 4 of this procedure.
5. Click **Save** to export.

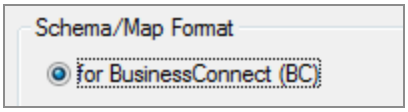
Schema/Map Formatting Options



Schema/Map Format

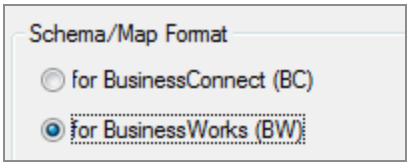
Select from one of the following formats:

For BusinessConnect (BC):



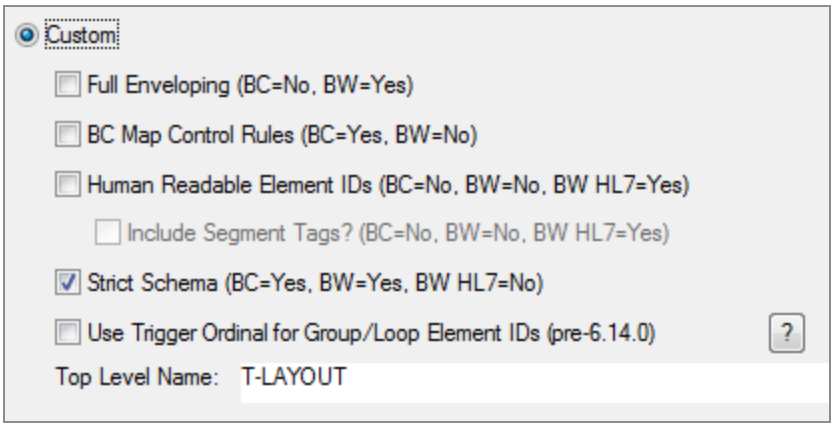
When selected, Standards Editor outputs the schema in a format compatible with TIBCO BusinessConnect™. This format consolidates enveloping segments at the top of the schema and outputs rules to assign control numbers used by BusinessConnect.

For BusinessWorks (BW):



When selected, Standards Editor outputs the schema in a format compatible with TIBCO BusinessWorks™. This format uses full formatting and preserves the tree structure of the data as required by BusinessWorks™.

Custom:



The Custom option allows you to specify formatting options for the schema. **Note that the selections available within this option vary with the type of transaction you are exporting.**

- **Full Enveloping.** If selected, this option puts the envelope grouping around the transaction. If not selected, the enveloping is consolidated at the top of the schema.

  This option is

- not compatible with BusinessConnect
- compatible with BusinessWorks.
- **BC Map Control Rules**. If selected, this option inserts the BusinessConnect control rules into the map files.

  This option is

- compatible with BusinessConnect
- not compatible with BusinessWorks.
- **Human Readable Element IDs**

  This option causes the exported schema and maps to use the segment, composite, and element names in the schema element naming.

  Example:

  Without Human Readable Element IDs selected:

```
S-BHT_2
```

```
E-1005_2_01
```

With Human Readable Element IDs selected:

```
BHT.BeginningOfHierTransaction_2
```

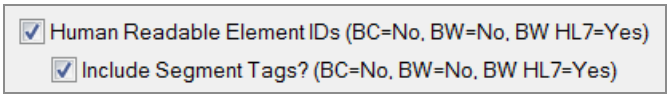
```
HierStructureCode_2_01
```

Caution: Use of this option results in very large schemas.

This option is

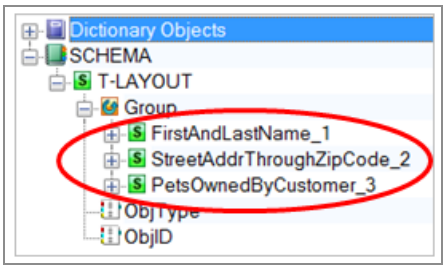
- not compatible with BusinessConnect
- not compatible with BusinessWorks
- compatible with BusinessWorks HL7 data.
- **Include Segment Tags?**

  When the Human Readable Element IDs option is selected, you can also opt to include segment tags.

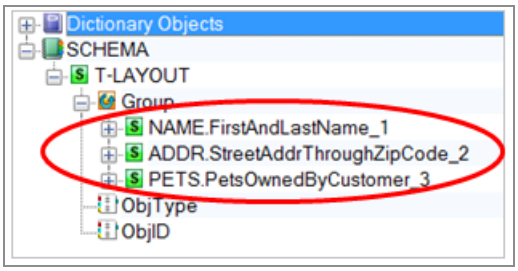


  Checking the Include Segment Tags box will include the segment name as part of the schema element name. This is useful for additional naming information and makes the data more readable.

  Without box checked:



With box checked:



- **Strict Schema** (EDI to Schema export only)

  This option is used to specify if data types and limits in the base guideline should be carried over to the schema.

  If Strict Schema is selected, the data types in the schema appear the same as the data types in the source guideline. This includes the length, repeat, and type limits from the source guideline.

  If Strict Schema is not selected, the data types in the source guideline become text in the schema. The schema will retain the the structure of the source guideline but the length, repeat, and type limits from the source guideline are removed (i.e., they are converted to text in the schema).

  This option is

- compatible with BusinessConnect
- compatible with BusinessWorks
- not compatible with BusinessWorks HL7 data.

- **Use Trigger Ordinal for Group/Loop Element IDs (Pre EDISIM 6.14.0)** (HL7and EDIFACT only)

  This option toggles between pre-and post-EDISIM 6.14.0 behavior regarding population of the schema Element ID.

  If Use Trigger Ordinal is selected, the trigger segment's ID (ordinal) number is used in the schema Element ID for Loops/Groups. Use this option if you have created a large number of custom maps using pre-6.14.0 behavior.

  If Use Trigger Ordinal is not selected, the Loop/Group's ordinal number is used in the schema Element ID. (Default)

- No nillables on EDI elements (HL7 only)

  By default, EDI elements that are not required (i.e., not mandatory or marked Must Use) are defined in the XML schema with the attribute `nillable="true"`

This causes Translator to include elements with no data (empty elements) in the XML output as placeholders in the structure.

Note: This applies to EDI elements only. Other EDI objects (loops, segments, composites) are not affected.

If No nillables on EDI elements is selected, Translator will not include empty elements in the XML output.

If No nillables on EDI elements is not selected, Translator will include empty elements in the XML output.

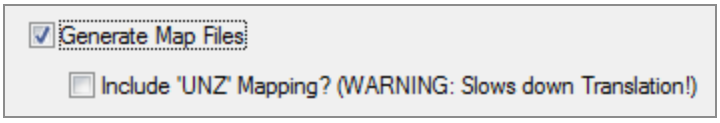
This option is not compatible with BusinessConnect, BusinessWorks, or BusinessWorks HL7 data.

- Top Level Name

  (User Defined Guidelines only) This option is used to override the default top level name of "T-LAYOUT". Enter a name of your choice.

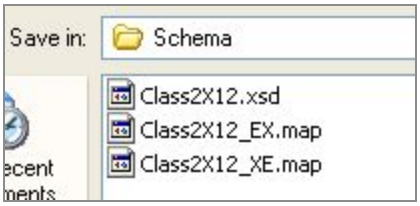
Generate Map Files

If desired, select Generate Map Files.



Map files map EDI to XML between the guideline and schema and vice versa and are used exclusively by TIBCO Foresight's Translator product. This option is checked by default.

Two map files are generated and saved in the same location as the XML schema file.



<filename>_EX.map contains the EDI to XML mapping

<filename>_XE.map contains the XML to EDI mapping.

- **Include 'END' Mapping?** (Tradacoms Only) Select this option to control the mapping of the Tradacoms END segment from EDI to XML when Full Enveloping is not used.

Note: Selecting this option will increase Translation time.

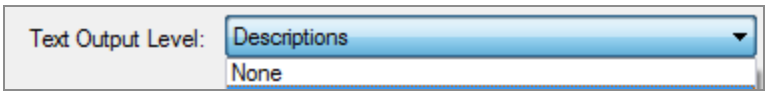
- **Include 'UNZ' Mapping?** (EDIFACT Only) Select this option to control the mapping of the EDIFACT UNZ segment from EDI to XML when Full Enveloping is not used.

Note: Selecting this option will increase Translation time.

- **Include STX 06 Map Rules?** (Tradacoms only) Select this option to include rules to populate the STX06 element (Recipient Reference) from BusinessConnect™ when creating EDI from XML.

  When not selected (default), the original content of the STX 06 element is used.

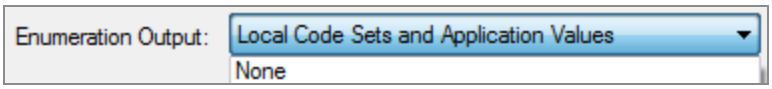
Text Output Level



Specify the Text Output Level you would like included in the export:

- None
- Descriptions (default)

Enumeration Output



Specify the Enumeration Output Level you would like included in the export:

- None (default)
- Local Code Sets and Application Values

Importing Guidelines and MIGs

Rules for Importing

A guideline will not import properly unless its underlying published standard is installed. For details, see Do I Have the Base Standard?.

The purpose of an import is to:

- Use a guideline that another EDISIM user has developed.
- Restore a guideline that has been deleted or damaged.
- Create a guideline from a schema, DTD, or flat file definition.

EDISIM will import schema, DTD, COBOL copybook, CSV, igML, SEF and COL file formats. COL files are created by Docstarter (see **Docstarter.pdf**).

How to Import

Importing a Single SEF Guideline

To import one SEF file:

1. Choose **File | Import | Import Single SEF and Open**.
2. From the Import dialog, choose the drive, folder, and file containing the guideline or MIG. The file type will normally be SEF (exported from Standards Editor 2.1 or later). Very old exports, from Standards Editor 2.0, will have file type STX.
3. Click **Open**.
4. Type a name (8 characters with no spaces or special characters except hyphen and underscore).
5. Choose **OK**. If the name is already used, you are asked if you want to replace it.

After importing, the guideline or MIG will automatically open.

Once imported, the guideline or MIG is available to any EDISIM product: Standards Editor, Doc Builder, Analyzer, Test Data Generator, Standards Reference, and Comparator.

Importing Multiple SEF Files

To import multiple guidelines and MIGs:

1. Open Standards Editor and choose **File | Import | Import Multiple .SEF Files**.
2. Select the drive, folder, and .SEF files. To select multiple files, hold down the *Ctrl* key while clicking on each file. You can also select a range of files to import by clicking on the first file and then using *Shift*+click on the last file.

3. When finished selecting files, choose **Open**.

   The Import Files dialog appears. You can adjust the column widths by dragging the splitters between the column headings.

   This box lists each guideline and MIG that will be imported. These are not necessarily the same as the filename. Check the Status column to see if a name is already in use.

   If the file already exists, you can:

   Remove it from the list of files to import: click on it and then click the Remove button.

   Rename it: click on it in the Standard Name column, and then click it again.

   Overwrite the one currently in EDISIM by selecting the **Overwrite existing Standard (s)** check box (clicking this box toggles it on and off). This setting affects the entire list.

   Skip it by not selecting the Overwrite existing Standard(s) check box.

4. Click **Import**.
5. When finished, the Status column reports the results.

Importing Analyzer Docstarter Files

To import a guideline or MIG created from EDI data files, use **File** | **Import** | **Import Analyzer Docstarter File**. This is explained **TIB_fsp_edisim_n.n.n_docstarter.pdf**.

Importing XML, COBOL, and CSV Files

For details about importing and using XML schemas and DTDs, see **TIB_fsp_edisim_n.n.n_XMLatForesight.pdf**.

For details about importing and using COBOL and CSV, see **TIB_fsp_edisim_n.n.n_FlatFilesAtForesight.pdf**.

Correcting SEF File Parameters during Import

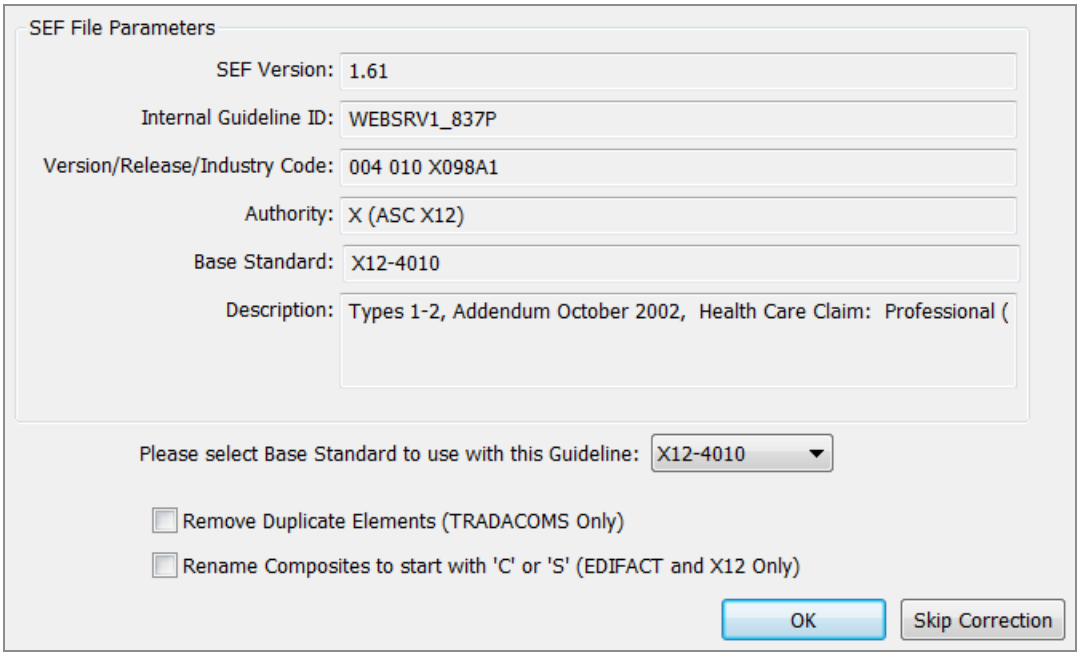
The SEF File Parameters screen appears when you import a SEF file. This optional step allows you to make corrections in the event your guideline:

- should be based on a certain standard

- contains duplicate elements
- contains composites that must be renamed.

Corrections are typically not needed. Unless your guideline requires corrections, click **Skip Correction** to make no changes and continue with the import.

Caution: If you make corrections, be aware that mismatches could lead to unpredictable results.



The first part of the SEF File Parameters screen contains non-editable descriptive information about the SEF you are importing.

The following options can be changed:

Select Base Standard	Use this drop down list to select a base standard to be used with this guideline. You may select from any guideline on the system.
Remove Duplicate Entries	(TRADACOMS only.) Check this box if you want to remove duplicate elements in a segment.
Rename	(EDIFACT and X12 only.) TIBCO Foresight validation and translation products

Composites	require that composites for EDIFACT and X12-based guidelines start with a C or S. If your SEF has composites that do not start with C or S, checking this box causes Standards Editor to add a C to the composite name (e.g., `A010` becomes `CA010`).

Publishing Guidelines and MIGs

Introduction

The Standards Editor Publishing feature provides a simplified way to generate and distribute guidelines and related files (schemas, maps, SEF files, etc.) to other areas on your system and/or network.

Publishing is organized around **Destinations** and **Operations**.

A Destination is a logical collection of Operations that are done for a guideline for specific systems. For example, a Destination could be a BusinessConnect EDI system, an Instream installation, etc.

An Operation is made up of three parts:

1. The operation type (Copy Std, Export to SEF, and Export to Schema/Maps).
2. A folder location for the file(s) to be generated.
3. A filename ‘template’ to name the generated files.

Destinations can be modified by the user via the Publishing Destinations Dialog. Publishing data is stored in a file called `PublishingDestinations.ini`, located in the EDISIM bin folder.

Example

To place a guideline in BusinessConnect EDI for use once it’s ready for production, the following steps must be performed:

- The STD file must be copied over to the BusinessConnect Instream/database folder. If it is being renamed, the internal name must be corrected manually to match.
- An XML schema and map files must be created from the guideline and placed into the BusinessConnect Instream/database folder.

Similar steps are involved for BusinessWorks and stand-alone Instream. Additionally, guidelines are often copied to source control systems for customers that have implemented them.

Publishing replaces these manual steps with a single, automated one.

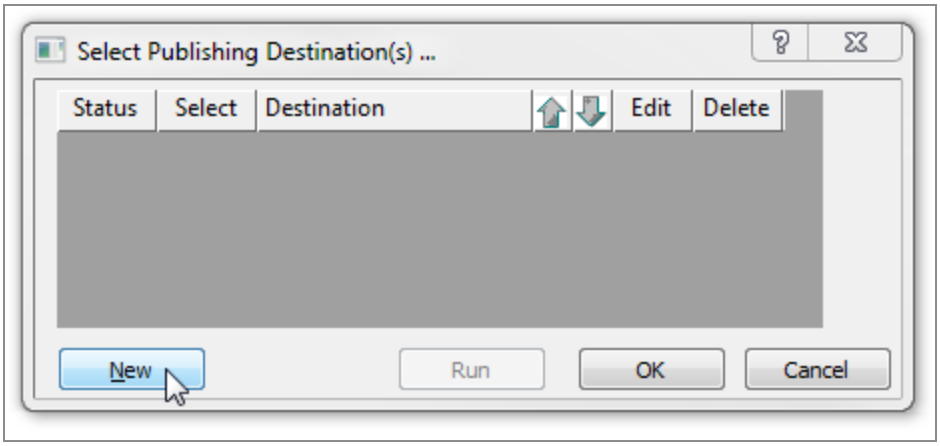
How to Publish

Publishing is accomplished in two parts:

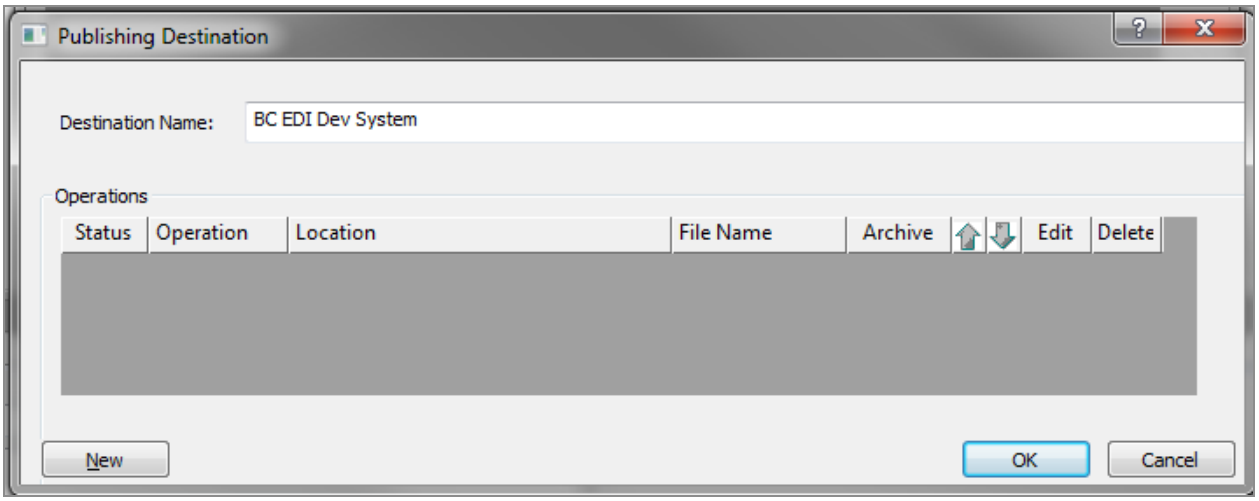
1. Initial Set up of Destination
   - Create a Destination
   - Add Operations to a Destination
2. Run the Publish function as needed.

Create a Destination

1. Select **File | Publish** while your guideline is open in Standards Editor.
2. The Select Publishing Destination(s) dialog appears. Click New. For complete details about this dialog, see Select Publishing Destination(s) Dialog.



3. The Publishing Destination dialog appears. Enter the name or description of the destination in the Destination Name field. In this example, the name is “BC EDI Dev System.” For complete details about this dialog, see Publishing Destination Dialog.

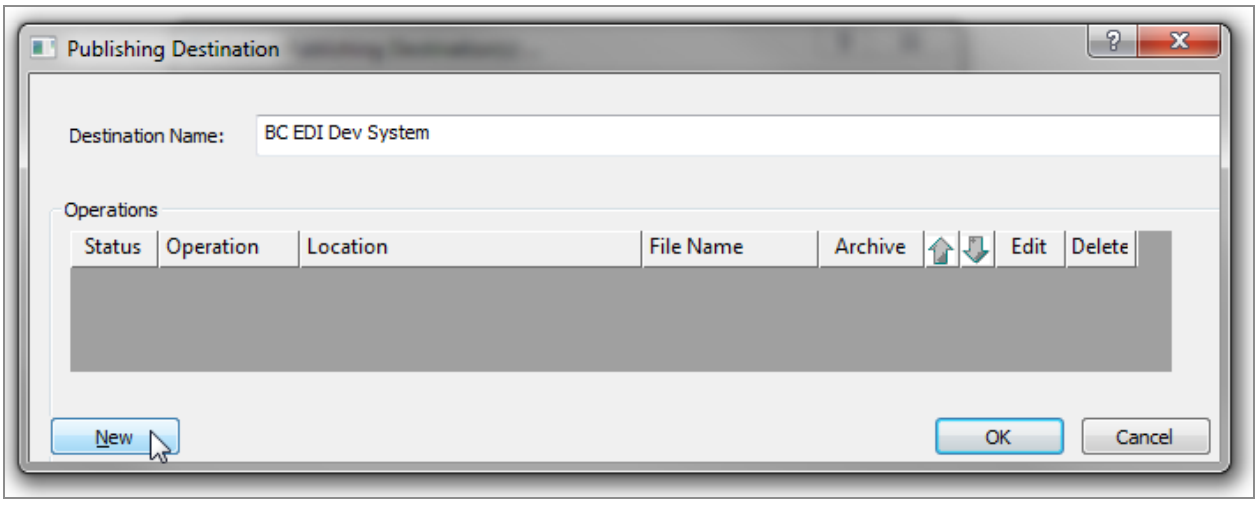


4. If you are done, click OK, but note that the destination has no operations associated with it.

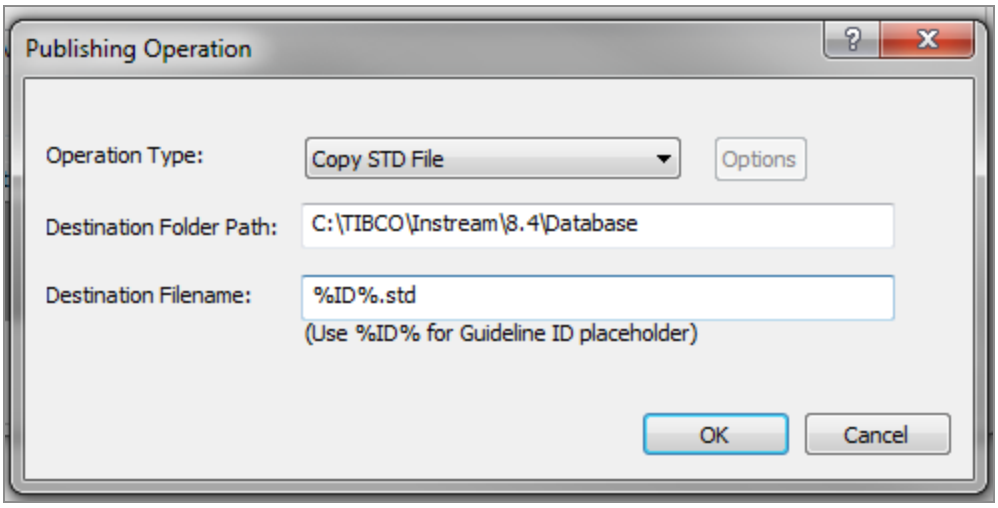
To associate one or more operations with this destination, continue with the next procedure.

Add Operations to a Destination

1. Click New.

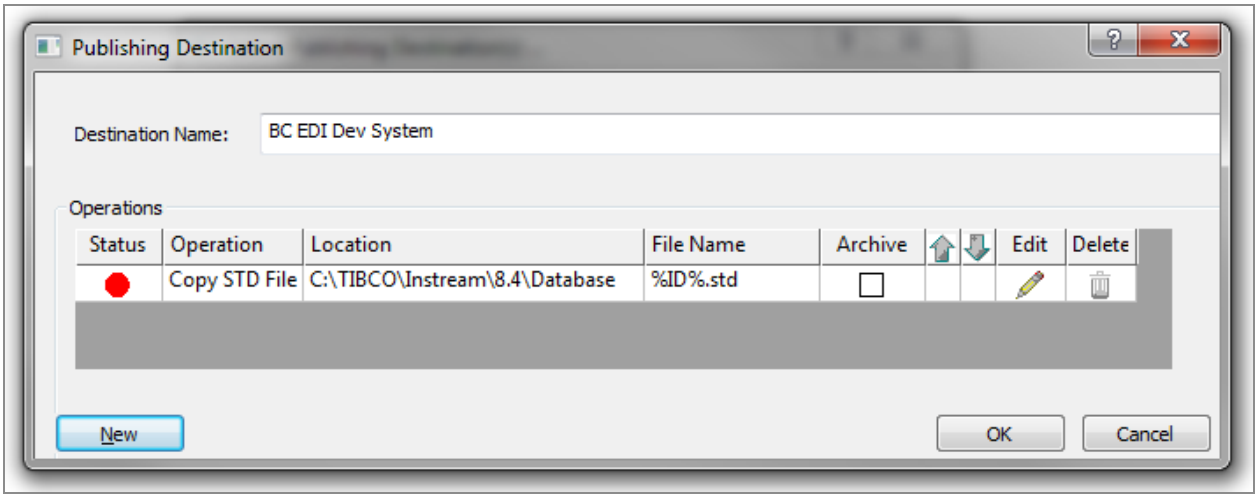


2. The Publishing Operation Dialog appears. Enter the Operation Type, Destination Folder Path, and Destination File Name. For complete details about this dialog, see Publishing Operation Dialog.



In this example, the first operation associated with the destination “BC EDI Dev System” copies the STD file and saves it to a file named *<guideline_id>*.std in the folder C:\TIBCO\Instream\8.4\Database.

3. Click the OK button to save the operation. The Publishing Destination dialog appears again, showing the new operation.



Note: Notice that the status for this operation is red. This means that one or more of the operation’s locations are inaccessible. All specified locations must be available (folders created, etc.) and write-enabled. See Select Publishing Destination(s) Dialog.

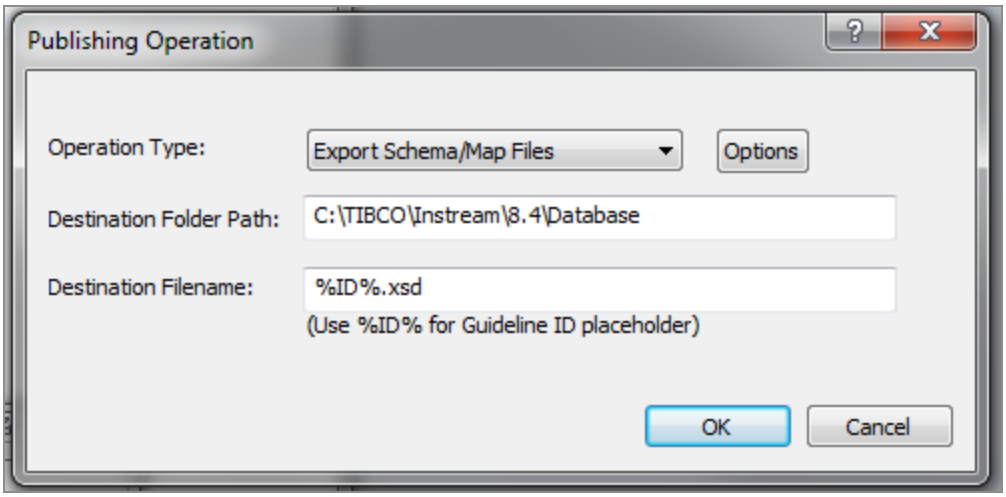
4. If you wish to archive the files, select the Archive box.

Archiving creates backup of any existing file that would otherwise be overwritten during publishing. To use this option, a folder called Archive must exist in the folder specified in the Location Column. For more details about Archive, see Publishing Destination Dialog.

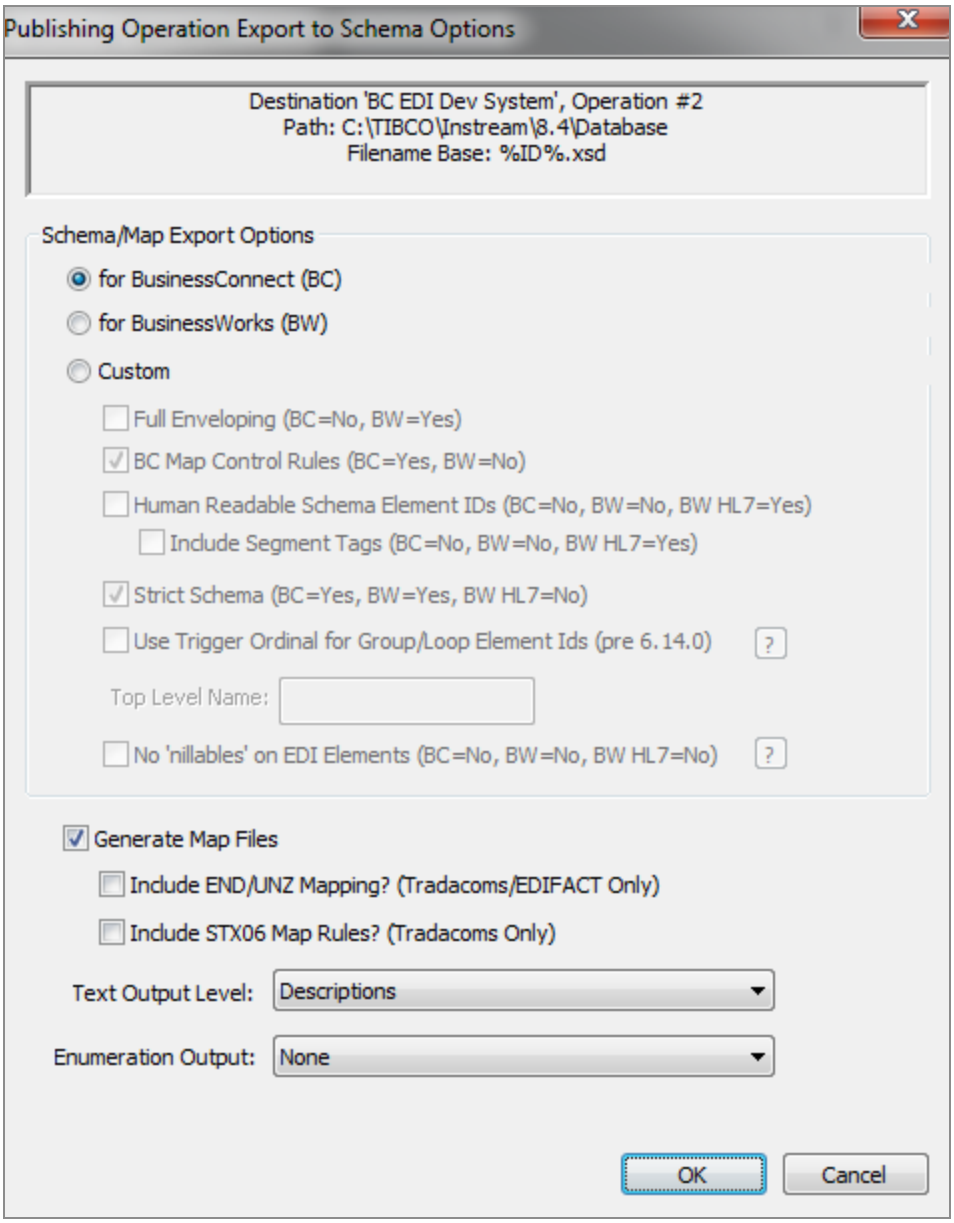
5. To edit or delete the operation, click the icon in the the approprate column.

If you are done, click OK. Otherwise click New and repeat this procedure from Step 2 to add more operations.

6. In our example, the next operation creates an XML schema and map files from the guideline and saves the files as *<guideline_id>*.xsd in the folder C:\TIBCO\Instream\8.4\Database.



7. Because the Export Schema/Maps operation has options associated with it, the Options button is active. Select the Options button. The Publishing Operation Export to Schema Options dialog appears. For details about this dialog, see Export to Schema Options Dialog.

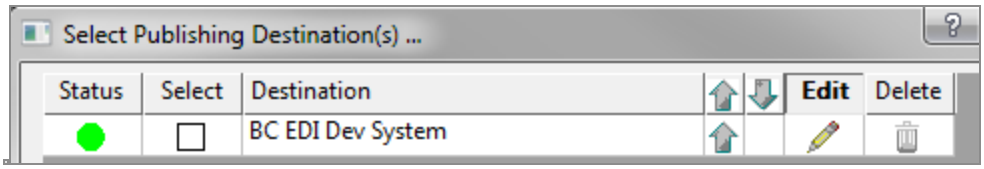


Select options as appropriate for the export. Click OK when done.

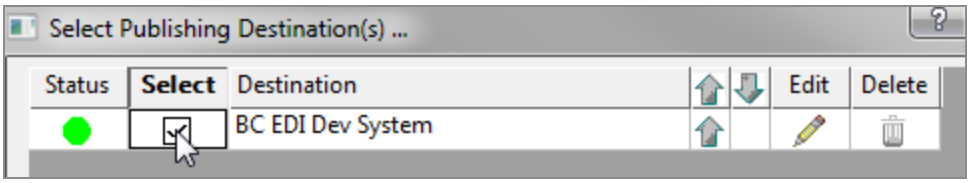
8. Click OK to save the operation. The Publishing Destination dialog appears showing two operations. Operations are run one at a time in the order that they appear in the list. Use the Up/Down arrows  to change the order of the operations if desired. For additional information, see Publishing Destination Dialog.
9. Click OK to save the destination information.

Run the Publish Function

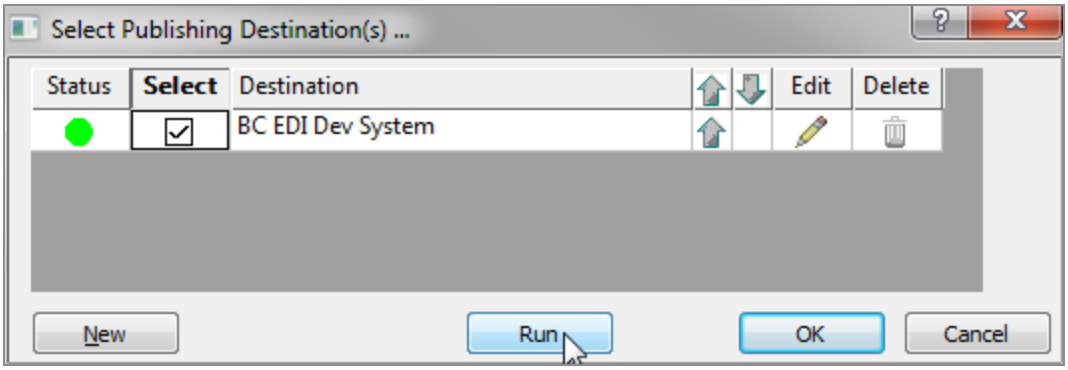
1. Select **File | Publish** while your guideline is open in Standards Editor.
2. Ensure that the status for the destination you wish to publish shows as green in the Status column.



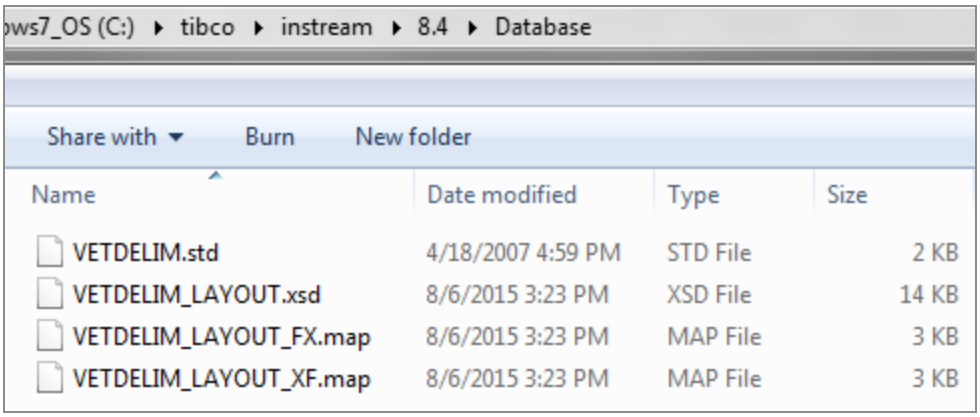
3. Check the box in the Select column.



4. Click Run.



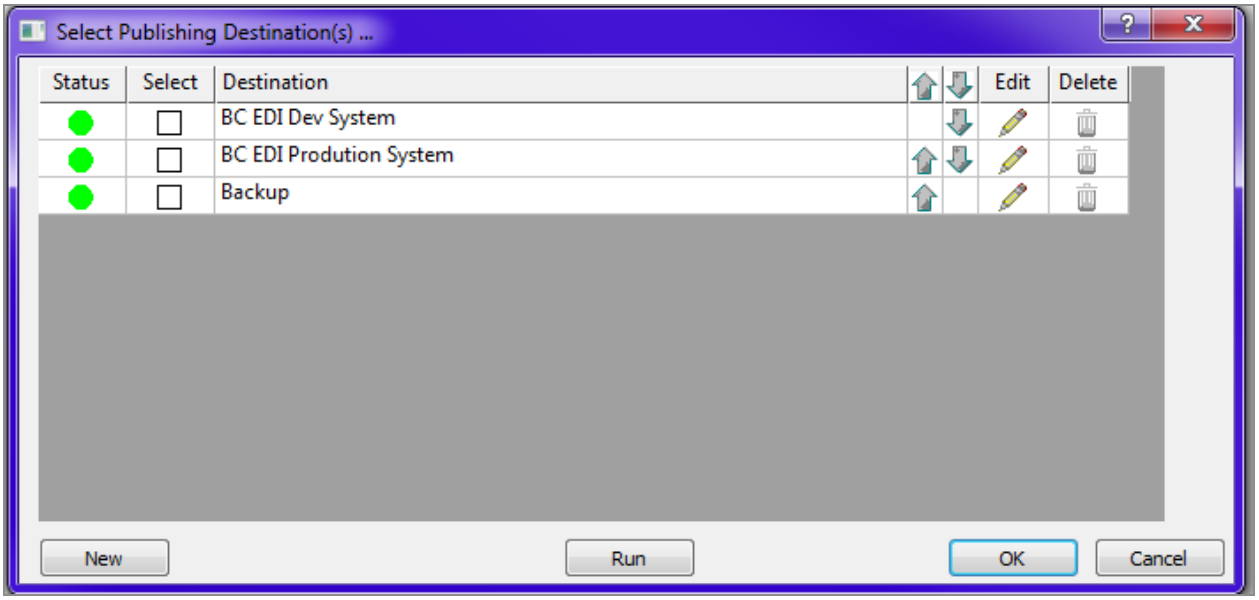
5. Navigate to the folder specified in the operation. The requested files appear.



Select Publishing Destination(s) Dialog

The Select Publishing Destination(s) dialog is used to select and run Publishing tasks, as well as editing the destinations and their operations. Each row contains information about a single Destination.

When a column is selected, the column heading displays in bold type.



Status

The Status column provides the status of a Destination.

Color	Meaning
Green	The Destination's operation locations are all available and write-enabled.
Yellow	The Destination contains an Export to Schema operation and no transactions are selected in the guideline.
Red	One or more of the operations' locations, including any archive locations, are inaccessible. Click on this column to re-check the destination's locations.

Select

Use the Select column to select/deselect Destinations to be run.

Destination

The name of the Destination.

Up/Down Arrows

The Up/Down arrow columns are used to move the Destination line up or down in the list. The selected Destinations are run in the order that they occur in the list.

Edit

Displays the Destination Edit dialog for the selected Destination. Use this dialog to change the name and/or operation list.

Delete

Deletes the Destination from the list.

New Button

Opens the Publishing Destination Dialog, which allows you to add a Destination to the bottom of the list.

Run Button

Saves and Runs any selected Destinations' operations using the current guideline and selected transactions (if applicable) and then closes the Publishing dialog.

Note: At least one Destination in the grid must be selected before this button becomes active.

OK Button

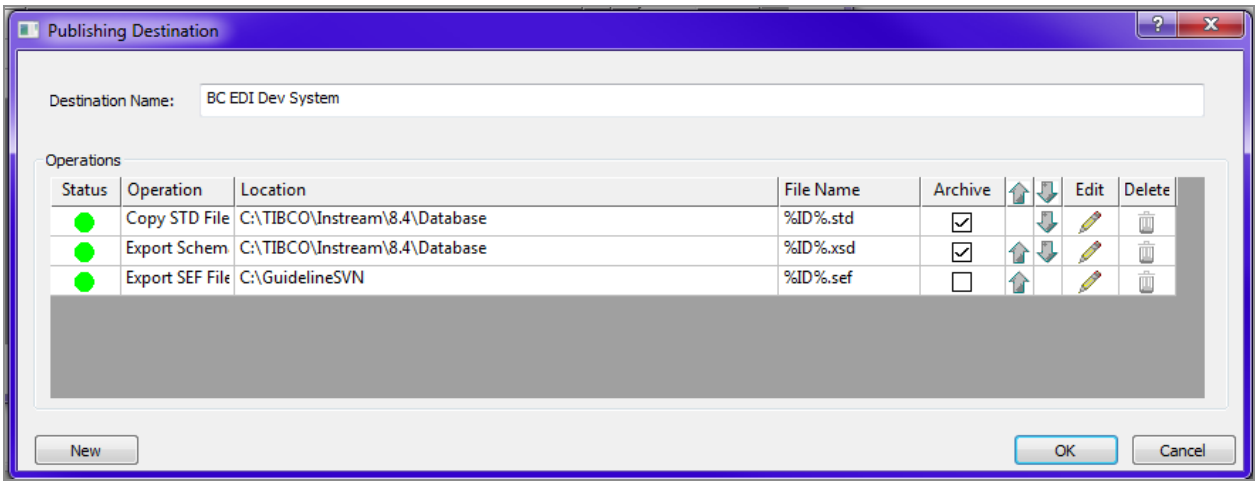
Saves any Destination/Operation changes and Exits the Publishing dialog.

Cancel Button

Exits the Publishing dialog without saving Destination/Operation changes.

Publishing Destination Dialog

The Publishing Destination dialog is used to edit or enter Destination information, including the Destination's description and list of Operations. Each row in the grid contains information about a single Destination.



Destination Name Field

Describes the the name and purpose of the Destination.

Status Column

The Status column provides the status of an Operation.

Color	Meaning
Green	The Operation's location is available and write-enabled.
Yellow	The Operation is an Export to Schema operation and no transactions are selected in the guideline.
Red	One or more of the operation's locations, including any archive locations, are inaccessible. Click on this column to review the operation's locations.

Operation Column

The Operation column contains the Type of the Operation. This can be Copy to STD, Export SEF File, or Export Schema/Map Files.

Location Column

Contains the folder where the file or files generated by the operation should be placed.
Note: The user must have read/write access to this folder.

File Name Column

Contains the name of the files to be written by the Operation. You can use the wild card %ID% in this field; it is replaced with the Guideline ID when the file is generated.

Archive Column

Instructs the Publishing feature to create a backup of any existing file that would otherwise be overwritten during publishing.

The file is named as follows: *<original filename>_<yyyymmdd>_<hhmmssss>* where *yyyymmdd* is the current date and *hhmmssss* is the current time.

Important: To use this option, a folder called Archive must exist in the folder specified in the Location Column.

Up/Down Arrows

The Up/Down arrows are used to move the Operation up or down in the list. Operations are run in the order that they occur in the list.

Edit

Clicking on the Operation's Edit cell will display the Operation Edit dialog for that Operation to allow the type, location folder, and file name to be changed.

Delete

Deletes the Operation from the list.

New Button

Opens the Publishing Operation Dialog, which adds an Operation to the bottom of the list.

OK Button

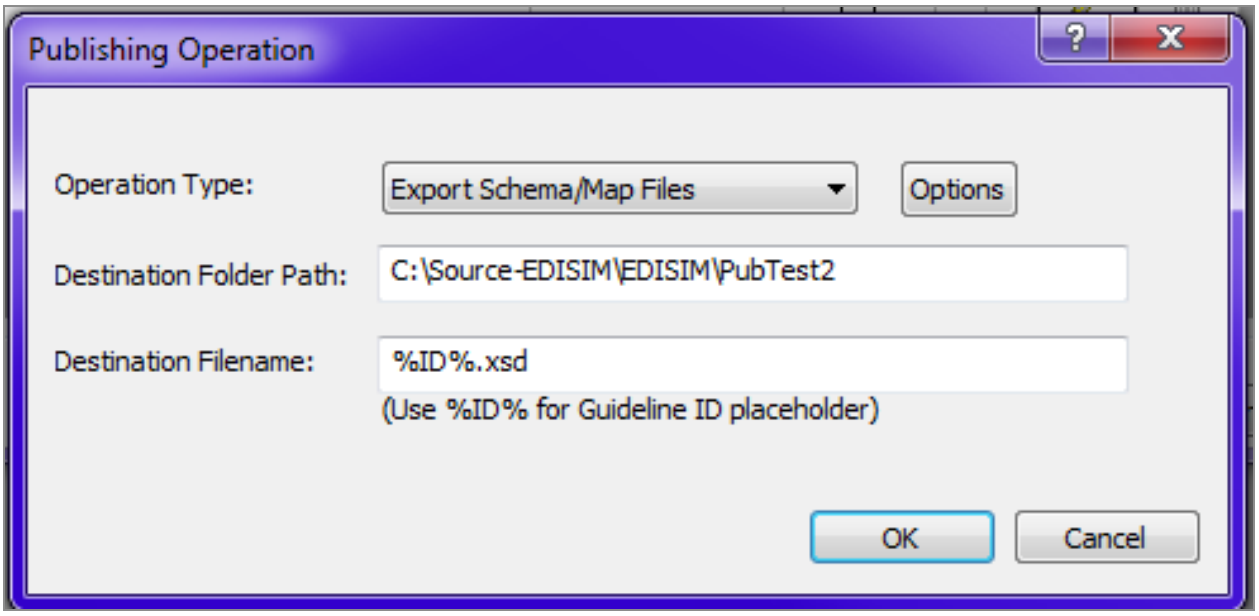
Saves any Operation changes and exits the Destination dialog.

Cancel Button

Exits the Destination dialog without saving Operation changes.

Publishing Operation Dialog

The Publishing Operation dialog is used to enter or edit information on a Publishing operation. This includes the operation type (including any associated options), target folder, and file name.



Operation Type

Drop down list used to specify the operation type.

- Copy STD File
- Copies the current guideline's STD file in the specified location
- Ensures that the internal guideline name in the resulting std file matches the original file name.
- Export SEF File

  Creates a SEF format version of the current guideline in the specified location/name.
- Export Schema/Map Files

  Creates an XML schema and map files from the current guideline and all selected transaction sets.

Options Button

(Enabled only for Export Schema/Map Files operation type.) Accesses the Export to Schema Options dialog, where additional options for the operation can be selected. See Export to Schema Options Dialog.

Destination Folder

Specifies the folder where the generated file(s) should be placed.

Destination Filename

Specifies the name of the generated file. Some operations, such as Export Schema/Map Files, create multiple files. These operations use this entry as a base for the resulting files.

You can use the wild card %ID% in this field; it is replaced with the Guideline ID when the file is generated. This allows a single Destination to be used for many guidelines.

Note: If this field does not contain the %ID% string, a warning message is displayed.

OK Button

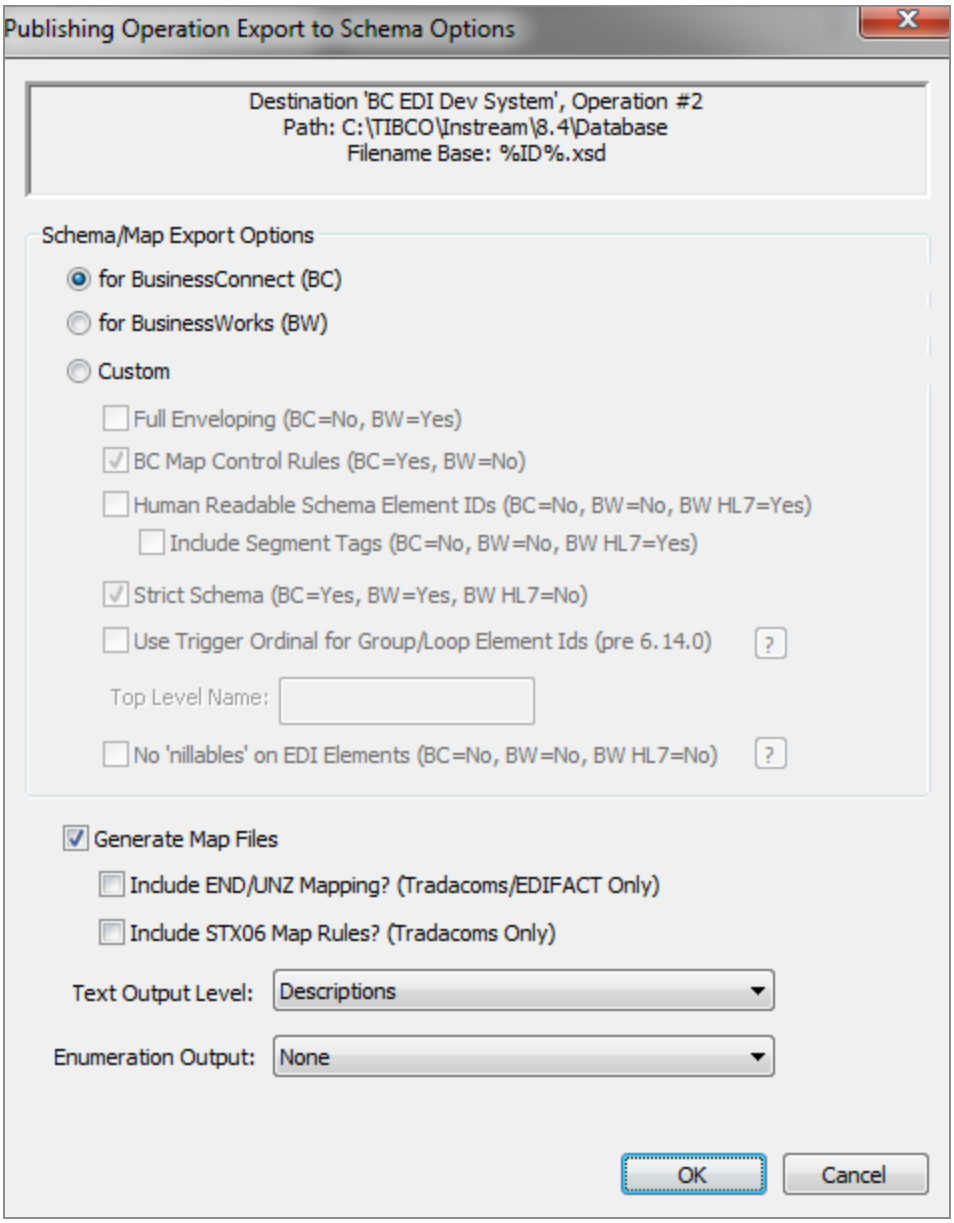
Saves any changes and exits the Operation dialog.

Cancel Button

Exits the Operation dialog without saving any Operation changes.

Export to Schema Options Dialog

The Export to Schema Options dialog is used to set options for a schema/map export process.



Title Area

Describes the Destination and Operation for which the options are being edited.

Additional Options

This remainder of this dialog is identical to the dialog used when exporting schemas and maps. Refer to Schema/Map Formatting Options.

E-Mail and Export Files

Be sure to zip all SEF files before you send them via e-mail. If you receive an unzipped SEF file via e-mail, do not import it. Contact the sender and request a zipped SEF file instead.

Sending files via e-mail may cause carriage return line feeds (CR/LFs) to be inserted into long lines. **This will cause the guideline or MIG to import incorrectly, but it may not be obvious that information is missing**. Symptoms will vary depending on where the wrapping occurred, and may be subtle.

Do I Have the Base Standard?

To import an EDI guideline or MIG from another EDISIM user, you must have its underlying published standard installed.

To identify the base standard

If you can open a guideline or MIG, the base standard's name is always visible under **File | Properties**.

If you cannot open a guideline or MIG, you can identify the base standard by looking in its SEF or STD file. Open it with Notepad or another text editor.

Warning Do not change or save the SEF or STD file.

In SEF files, the line after .INI will resemble this:

EANCOM93,,D 93A EAN002,UN,D93A,EANCOM Based ...

or this:

CLASS850,,003 070,X,X12-3070,x12-3070 Purchase order ...

The information after the fourth comma is the base standard.

To see if the base standard is installed

Once you have identified the base standard, see if it is installed. Open Standards Editor, choose **File | New**, choose the **Both Published and User** tab, and see if the standard is in the list. If not, use custom installation in the EDISIM installation program.

Standards Editor Panes

Top Pane – Guideline View

The top pane shows all items within your guideline.

The title bar displays the name of the current guideline, MIG, or standard. It includes the word Modified if you have unsaved changes.

Dictionary Objects is the entrance into the dictionary. Expand or contract it by clicking on the plus/minus sign.

Transaction sets and messages are listed right below the Dictionary Objects. Expand and contract by clicking on the plus/minus signs or by double-clicking on one of them.

Expand or contract an item by clicking on the plus/minus sign preceding it.

Columns can be sized by dragging the splitters between the column headings.

Columns include:

Item (*Pos:ID*)

An icon representing the type of item (segment, loop, element, etc.), the position of this item in its parent, and the ID for each item. Position and ID come from the base standard. You can double-click an item to expand it or contract it, or you can use the plus/minus box in the top pane.

Description

The item's description. You can change an item's description in the top pane by double-clicking on it and typing a new description. **Best Practice:** Add your description to the end of the one from the published standard, rather than replacing it.

Req

The item's requirement according to the base standard.

Unless you are developing a new published standard, you should leave the Req alone and use the U/A column for your own usage.

U/A

User attributes - your organization's usage. Clicking on the arrow in this column displays a menu for setting user attributes. Do not change the U/A for items with a Req of Mandatory.

Repeat

The maximum number of times this item can appear in the data at this location. >1 means one or more times. Change this to reflect the repeat according to your organization. To change, click on the number and type the new repeat, or click the up or down arrow until the correct repeat shows. Do not exceed the base standard's repeat.

Type

The data type of the element: alphanumeric, code value, numeric, etc.

Min/Max

The first number is the minimum number of characters in the data for this element, and the second number is the maximum. To change it, click on the Min/Max numbers. You can either select the field and then type new numbers directly over the old values, or use the arrows to change the current numbers. Do not go below the base standard's Min or exceed the base standard's Max. If unsure of the base standard's original min/max, look at the segment under Dictionary Objects.

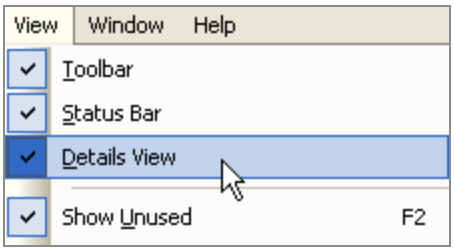
Indicators

These abbreviations are visual cues to these characteristics:

BV	Business Rule Variable
BZ	Business Rule
CM	Comments
CV	Code Value
L1, L2, L3…	Level 1, Level 2, Level 3, etc. notes
SM	Semantic Notes
VR	Application Value list

Bottom Pane – Details View

The bottom pane, referred to as the Details View, shows information about the item selected in the top pane. You can enable and disable the Details View pane using **View** | **Details View**.

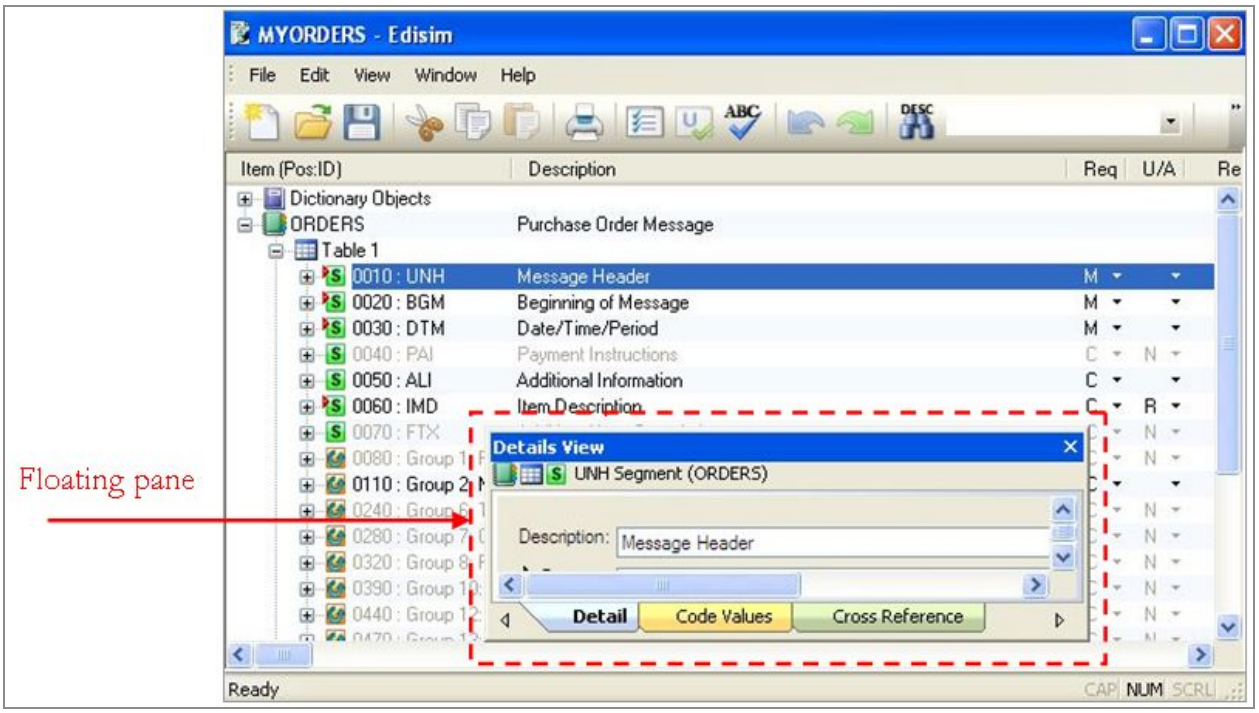


Positioning the Details View pane

The Details View pane can be floating or docked. By default, the pane appears docked at the bottom of the Standards Editor window. Double click the top bar of the pane to toggle between its most recent floating and docked positions. Size and position are saved when you exit the guideline.

Floating

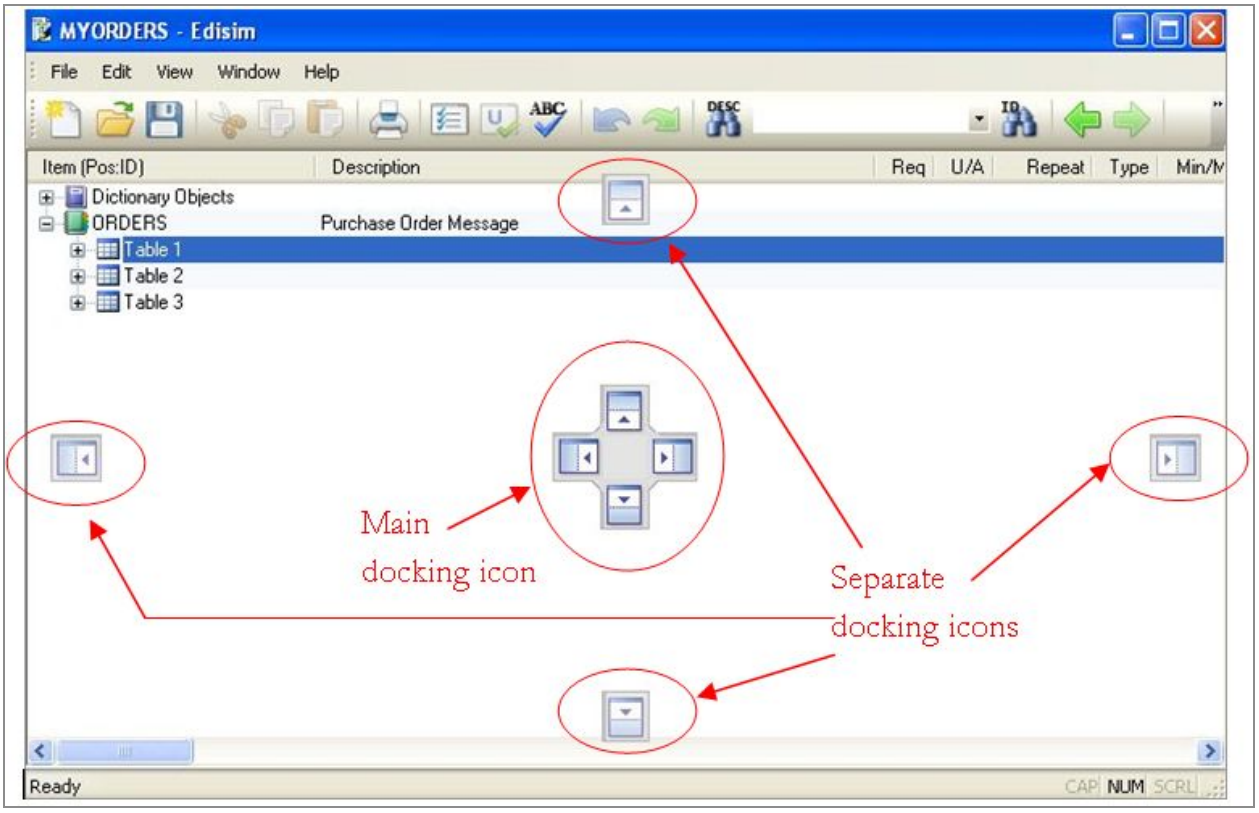
When the pane is floating, it can be moved freely on the screen by clicking the top bar and dragging the pane to the desired position. It can also be resized in the typical manner.



Docked

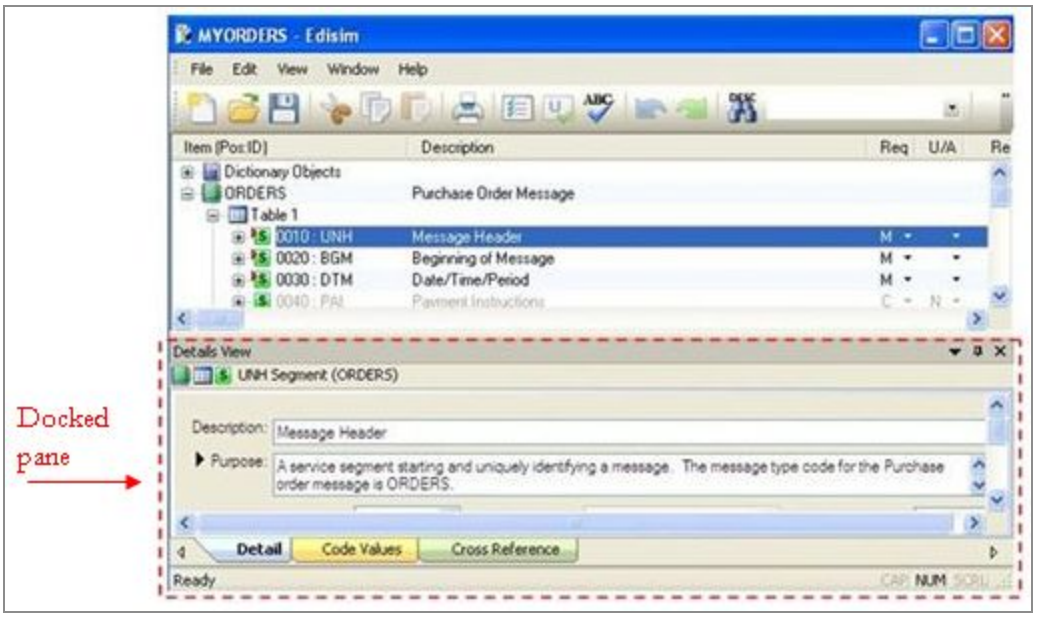
When the pane is docked, it is fixed to the top, bottom, right, or left of the screen and expands to the width or height of the Standards Editor window. The width or height of the pane can be adjusted with the splitter bar.

Docking icons appear when you click the top bar of the pane and move it.



To dock the Details View pane:

1. Click the top bar of the pane and move it. The docking icons appear.
2. Move the pane over the desired placement icon on either the main icon or one of the separate icons. As you move over the icons, shading appears showing you the corresponding placement of the pane.
3. Click off the top bar while over the desired icon and the pane moves to the selected position and resizes accordingly.



To undock the Details View pane:

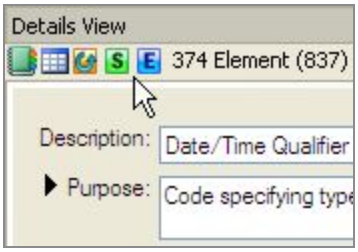
Click the top bar of the pane and move it. The docking icons appear.

Or…

Double click the top bar of the pane and it returns to a floating state.

Contents of the Details View

The icons at the beginning of its title bar show you the parents of the current item.



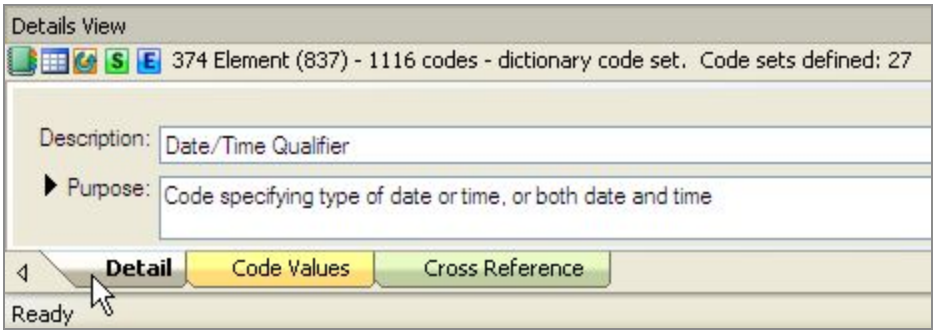
It has three tabs along the bottom left.

Tab	Contents	See ...
Detail	Details about the selected item.	Detail Tab
Code Values	Code values (available when an element or code value line is selected in the top pane)	Code Values Tab
Cross Reference	Where the selected item is used.	Cross Reference Tab

Detail Tab

The Detail tab in the bottom pane shows all available information about the current loop, group, segment, composite, or element.

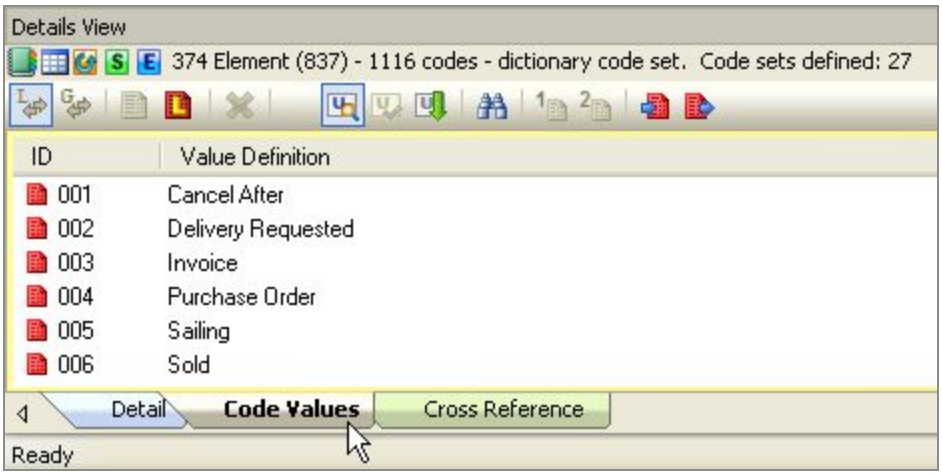
Data that can be changed in the top pane can also be changed in the bottom pane. In addition, you can add or change notes, business rules, and other information. The fields and information displayed will vary, depending on the item selected in the top pane.



In this example, element 374 has been selected in the top pane. Notice the heading for the detail pane: it shows the element plus icons indicating the item's parentage. These icons can be useful for heavily nested loops.

Code Values Tab

You can use the Code Values tab in the bottom pane when an element with code values is selected in the top pane.



In this example, element 374 is selected in the top pane, and its code values appear at the bottom.

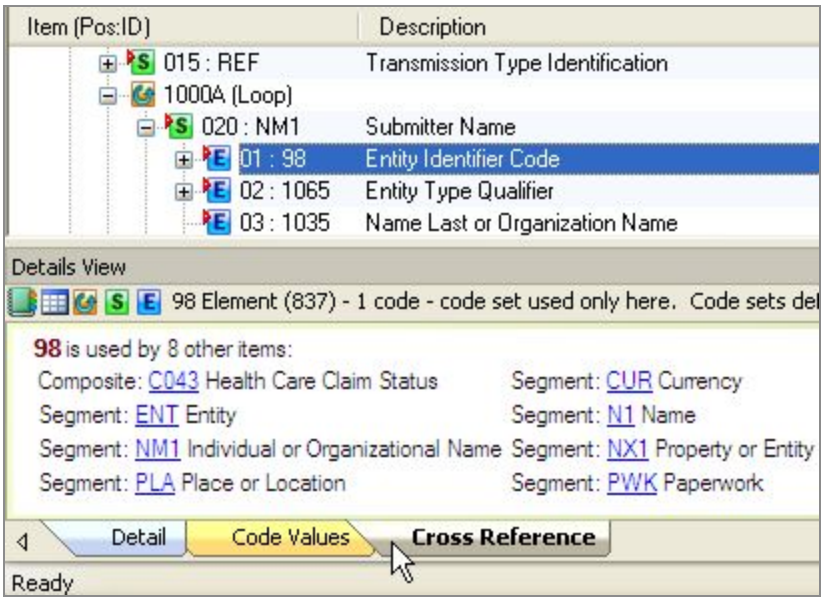
This tab lets you:

- Mark codes as used/unused.
- Add and delete your own local codes.
- Review level note properties
- Select a code set

For detailed information about Code Values and using this tab, see Working with Values.

Cross Reference Tab

The Cross Reference tab in the bottom pane shows where else a segment, composite, or element is used.



In this example, element 98 is selected in the top pane. The bottom pane shows the other places where element 98 is used.

By clicking on one of the links in the cross-reference list, you will move to that location. If the word "Segment" precedes the item that you click, you will go to the segment dictionary. If the word "Composite" precedes the item, you will go to the composite dictionary. Otherwise, clicking the item will take you to the transaction set or message.

For example, clicking **Segment: ENT Entity** in the example causes you to go to element 98 in the ENT segment in the segment dictionary. You can use the toolbar's back button  to return to your original spot.

Selecting Multiple Items in a Pane

You can have your actions affect multiple items. For example, you can select several segments and then mark them all unused at once.

1. Select all items to be affected:

   To select scattered items, hold down the *Ctrl* key while clicking each item.

   To select a range of items, click the first item in a range, then hold down the *Shift* key and click the last item (use the scroll bar to move to the end of the range, or the arrow keys).

2. Then, without clicking in the pane, perform the operation with the toolbar, menu, or keys.

Customizing Your Guideline

User Defined Transactions

Standards Editor lets you turn a TIBCO Foresight-supplied transaction or message into a user guideline - one that suits your particular trading relationship by:

- Changing properties, such as name or length.
- Customizing notes
- Working with values
- Adding items, such as segments or transaction sets
- Removing items, such as segments or loops
- Adding business rules.

Requirement Designators and User Attributes

Requirement designators (the Req column on the top screen) are the requirements for the item according to the published standard.

They display and can be changed in the Req. column of the top pane and under Requirement Designator in the Detail pane. In most cases, it is a good practice to leave this column alone.

User attributes are the requirement for your local guideline or MIG. They display and can be changed in the U/A column of the top pane and in the **User Attributes** section of the Detail pane.

Changing User Attributes

Set user attributes to reflect an item’s requirement according to you and your trading partners.

Ways to set attributes for a single item:

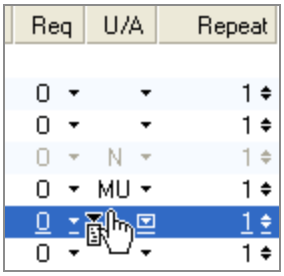
- Double-click the arrow in the top pane's **U/A** column.
- Select from the detail pane's **User Attributes** field.
- Select **Edit | User Attributes**.

Ways to set user attributes for multiple loops, groups, segments, composites, elements, or subelements:

1. Select the items in the top pane (see Selecting Multiple Items in a Pane).
2. Click **Edit | User Attributes** from the menu.
3. Choose the attribute and click **OK**.

User Attributes Terminology

The top pane uses abbreviations in the user attributes column:



These differ, depending on whether you are using an X12-based guideline or an EDIFACT-based MIG:

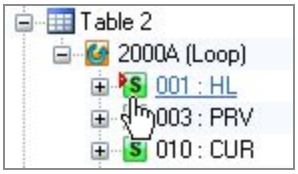
User Attributes Abbreviations		
	X12	**EDIFACT**
Used (Optional)	(*empty*)	(*empty*)
Not Used	N	N
Must be Used (Required)	MU	R

User Attributes Abbreviations		
Recommended (Advised)	R	A
Not Recommended	NR	NA
Dependent	D	D
When Can I change a User Attribute?		
	X12	**EDIFACT**
Segments Loops Groups	If Requirement (Req.) is O	If Requirement (Req.) is C
Composites Elements Subelements	If Requirement (Req.) is O, C, or X	If Requirement (Req.) is C

Used (Optional)
Use the setting of the Requirement Designator.

Not Used
According to us, this item is not to be included in the data. An item that has been marked as not used is faded on the editing screen (or not displayed at all). An item that has not been marked unused itself, but that is part of something else that is unused, will be faded but will not have the N. For example, segments will be faded if they are in an unused loop. But only the first will show a user attribute of N unless other segments were specifically set to unused. For details, see How to Quickly Tell if an Item is Not Used.

Must be Used (Required)
According to us, this item must be included in the data, even if the underlying standard says it is Optional or Conditional. A must-be-used item has **MU** or **R** in the User Attributes column. Additionally, its icon in the top pane will include a red triangle:



Recommended (Advised)
This item is optional but desirable. Its abbreviation is **R** or **A** in the User Attribute column.

Not Recommended
This item is optional and not considered useful. It is marked **NR** or **NA** in the User Attribute column.

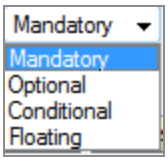
Dependent
This item's requirement depends on something else in the guideline or MIG. Highlight the item and choose **Edit | Advanced | Business Rules** to see an explanation of the dependency. The abbreviation for dependent is **D**.

Changing Requirement Designators

Changing the underlying standard's requirement is not recommended except for special circumstances. It may, however, be useful if you are working on developing new published standards.

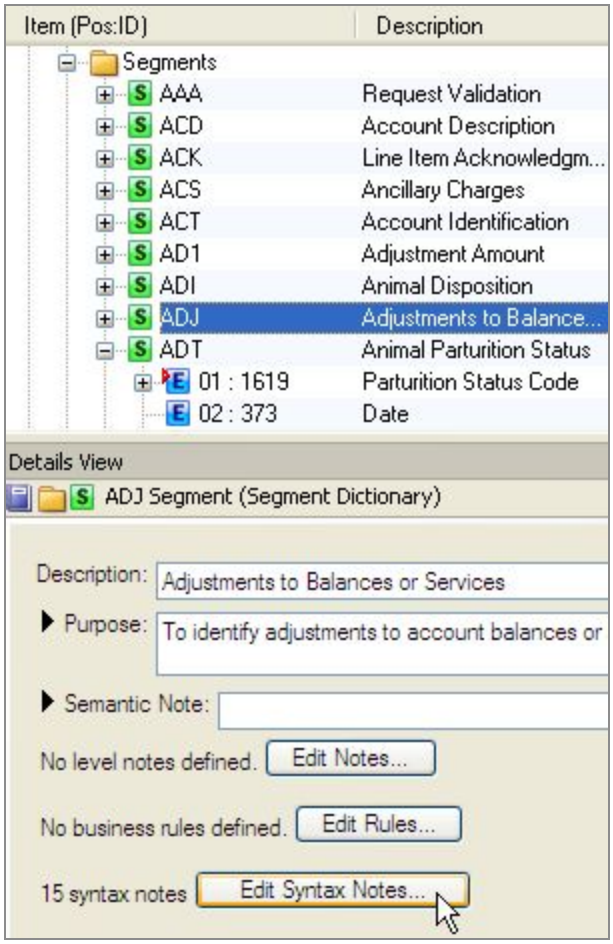
You can see the requirement designator or status in the top pane's **Req** column, and in the Detail pane's Requirement Designator field.

To change, double-click the down-arrow in the top pane's **Req** column, or the bottom pane's **Requirement Designator** box and select the requirement.



X12 requirement designators are:

Mandatory	Requirement for this item is mandatory, according to X12. If you choose **M**, User Attributes are automatically set to "Used" and faded. Icons for mandatory items contain a red triangle.
Optional	Requirement for this item is optional according to the underlying standard, so you are free to change the user attributes. **O** is for X12 transactions and is equivalent to C in EDIFACT.
Floating	The segment can appear anywhere in the table. The use of floating **(F)** is discouraged; it is usually limited to the ASC X12 NTE segment in Table 1.

Relational	This element or composite has a Syntax Note or Dependency Note that affects its requirement. **X** for an element means it is the dependent of a syntax note or dependency note. You can see the condition under **Dictionary Objects** | **Segments** | *<click the segment>* | **Edit Syntax Notes** (in the detail pane): 

EDIFACT requirement designators are:

Mandatory	Requirement for this item is mandatory, according to EDIFACT. If you choose **M**, User Attributes are automatically set to "Used" and faded. Icons for mandatory items contain a red triangle  .
Conditional	Requirement for this item is conditional. This is equivalent to **O** for X12.

TRADACOMS requirement designators are:

Mandatory	Requirement for this item is mandatory, according to TRADACOMS. If you choose M, User Attributes are automatically set to "Used" and faded. Icons for mandatory items contain a red triangle  .
Optional	Requirement for this item is optional according to the underlying standard, so you are free to change the user attributes.
Floating	The segment can appear anywhere in the table.
Conditional	Requirement for this item is conditional.

How to tell if an Item is Not Used

Top Pane

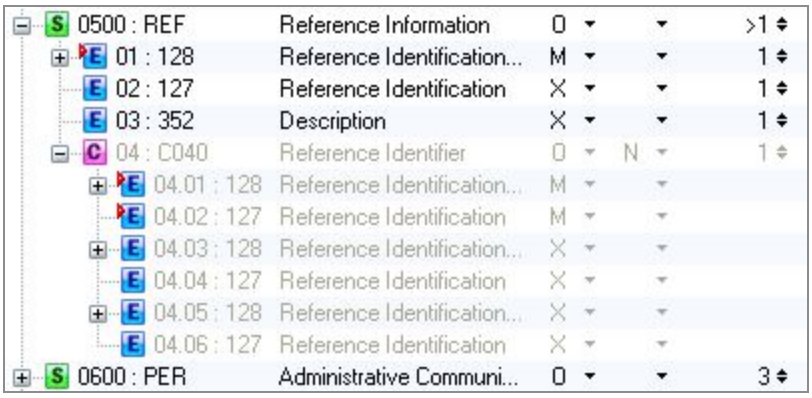
- **U/A column contains N**. The user attribute has been specifically set to “Not Used.”
- **Text is faded**. The user attribute has been specifically set to not used (if accompanied by an N) or the item is part of something that is not used (such as a segment in an unused loop or group).

Bottom Pane's Detail Tab

- **User Attributes field contains "Not Used."** The user attribute has been specifically set to “Not Used.”

In the example below, composite C040 has an O in the Req column, so it is optional, according to X12. Therefore, we can mark it unused, which we have done. It is now faded and has an N in the U/A column.

Its subelements are now treated as unused, whether we specifically mark them unused or not. In this example, we did not specifically mark the subelements unused and so they do not display the N in the U/A column.



My Mom is Unused but what am I? If an item is part of something that is not used, then its own requirement is not considered.

Example

Assume that an N1 loop is not used, so the loop trigger (first segment - the N1 segment) is faded and has an N in the **U/A** column. Everything in the loop (all segments, composites, and elements in it) will be faded, to alert you that they are part of something that is not used.

The unused loop's segments will not have an **N** in the U/A column unless they have explicitly been marked as not used. Some of these segments may have an M in the Req. column. This indicates that, if the loop again becomes used, then these segments will be required.

The same is true of elements in an unused segment or composite, and composites in an unused segment. They will show their own requirement, which will take effect only if whatever encloses them is used.

Working with Notes

Why use Notes?

In EDISIM, notes are used to add your own human readable information to a guideline. These can be viewed throughout EDISIM and selectively printed in Document Builder.

Best Practice Every time you make a change to a guideline, add a note. This lets you explain the reason for the change (for internal staff) and draws attention to it (for partners).

You can attach notes to a:

- Transaction set or message
- EDIFACT group for a guideline based on D94A and later
- Segment
- Composite
- Element or Subelement
- Code

Notes are grouped into **levels**. Each level serves a different purpose and may be intended for a different audience. You decide the purpose of each level and then consistently use it for that purpose throughout your organization.

Standards Editor offers up to 100 levels for notes (see Increasing the Number of Note Levels).

Many companies use level 1 for notes to the trading partner and level 2 for your own company's internal use.

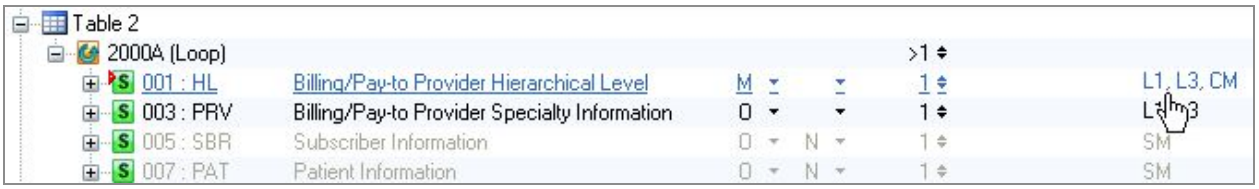
Some use level 3 for segment examples or for internal notes if they based their guideline on an industry guideline that used level 1 for their notes. When using industry guidelines that come with notes, use a different level for your notes rather than adding them to the end of the industry notes. That way, you can migrate your notes when new versions come out.

Some companies use a different level of note for each trading partner. That way, they can give specific notes and yet use the same guideline or MIG for multiple partners. When printing or exporting, they include only the appropriate levels for that partner.

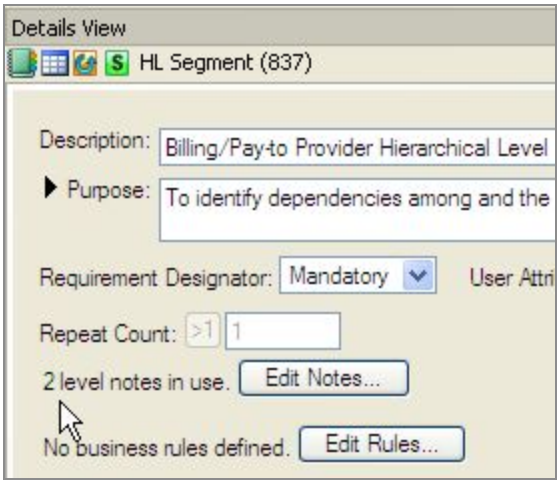
During the guideline review phase, you can have reviewers put their comments in a specified level of notes.

Viewing, Editing and Adding Notes

In the top pane, the **Indicator** column includes L1 if an item has a level 1 note, L2 if it has a level 2 note, etc.



In the Detail pane, the number of notes is shown to the left of the Edit Notes link.



Click **Edit Notes** to add, delete, or change notes.

Adding a Note

To add, change, delete, or read a note:

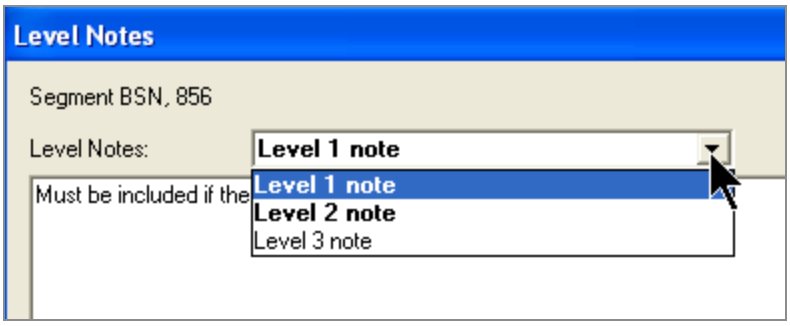
1. Click on the item in the top pane.
2. Open the note dialog in any of these ways:

- Click the **Edit Notes** button on the detail pane.
- Choose **Edit | Level Notes**.

- Use *Ctrl*-L.
- Right-click on the item and choose **Level Notes**.

This opens the Level Notes dialog:

3. Use the drop list to select the level. On the list, a level is bold if it already contains a note.



4. Type or paste (*Ctrl*-**v**) your note in the editing area.
5. When finished, you can add a note at any other level by selecting from the drop list again.
6. Click **OK** when you're finished with all levels for this item.

Copying and Pasting to and from Notes

All Standards Editor Edit boxes, such as those for level notes, have the ability to use:

Cut (*Ctrl*-**x**)

Cut whatever text is selected and put it in the Windows clipboard.

Copy (*Ctrl*-**c**)

Copy whatever text is selected into the Windows clipboard.

Paste (*Ctrl*-**v**)

Paste the contents of the Windows clipboard into the current location. Paste can be especially useful if you have another application, such as a word processor, containing much of the text of the notes.

You can use copy and paste between notes.

If you paste into notes, you may want to select **Wrap Soft Returns in Pasted Text** under **File | Preferences**. This setting eliminates control characters in pasted text, and converts

each single CR/LF (new-lines) into one space. *Tab*s are preserved and two or more consecutive CR/LF result in one hard return.

Printing and Migrating notes

Doc Builder lets you choose any combination of notes to print.

Comparator only recognizes levels 1-3.

Increasing the Number of Note Levels

By default, each guideline has three levels of notes. To increase the number of levels:

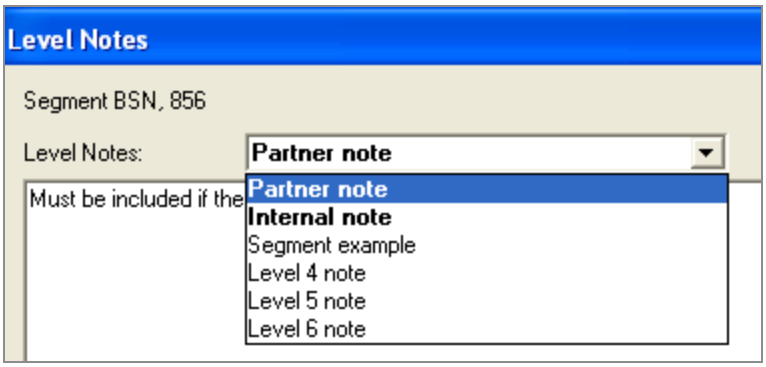
1. Choose **File | Properties**.
2. Choose the **Level Notes** tab.
3. Choose a new number, up to 100.

This box also lets you assign names to note levels. See Naming Note Levels below below.

Naming Note Levels

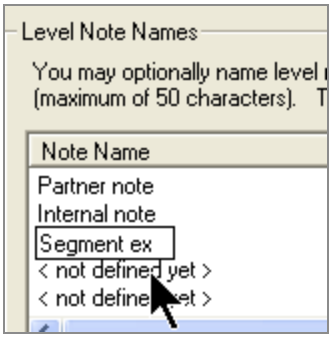
By default, note levels are numbered. To clarify the purpose of each level, you can assign names to some or all note levels. These note names appear in the Level Notes box and print in Doc Builder.

See Viewing, Editing and Adding Notes for details on opening the Notes box.



To assign names to note levels within a particular guideline:

1. Open the guideline.
2. Choose **File | Properties**.
3. Choose the **Level Notes** tab.
4. Click **<not defined yet>** and type over the text.



The Propagation of Notes

Notes in your transaction set or message can be inherited from the dictionary. They print in Doc Builder and show up in Standards Reference and Comparator, just as if they were added to the transaction set or message.

An item can have a note in one or more of these places.

1. Transaction set
2. Segment dictionary
3. Composite dictionary
4. Element dictionary

Transaction set notes always trump those from the dictionaries, segment dictionary notes trump those in the composite and element dictionaries, etc.

Working with Values

Standards Editor has code values and application values.

Code values

A list of acceptable values from the underlying standard. Current X12 rules say that code values may contain up to 20 characters, including uppercase A-Z and digits 0-9.

To accommodate other standards, EDISIM allows hyphens and slashes, except for the first and last character of the value. You can edit an element's list of code values, and you can create a list of code values for an element that has none.

Application values

A list of acceptable values that you provide.

The application value list itself has a name, which can be up to 50 characters long.

Application values can contain any printable characters, including spaces, and may be up to 250 characters long. They are case-sensitive.

They can also specify a pattern (or “regular expression”) rather than a literal value.

Any Foresight validation product will check for them and you can choose to print them in Doc Builder.

Seeing Code Values

Top Pane – Guideline View

If an element has code values, it will have:

- **CV** in the Indicators column:

- **ID** in the Type column (usually).
- **+** or **-** in front of an element.

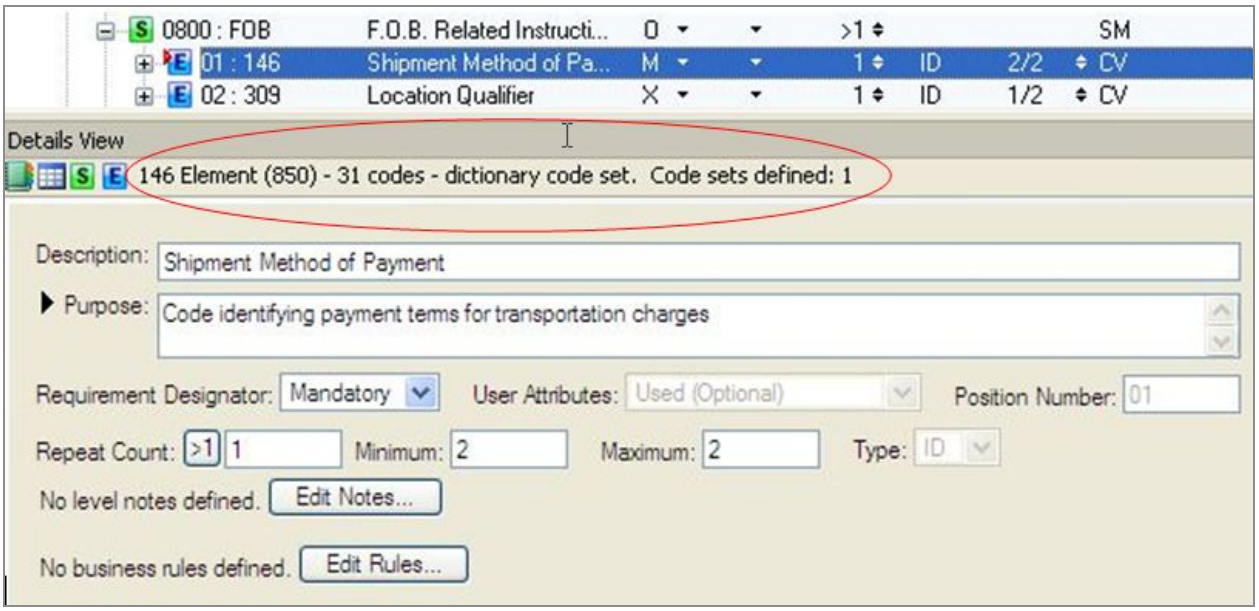
To see information about the codes in the top pane, click the plus sign. It turns into a minus and displays the code value line.

The code value line in the top pane shows:

- The code set number (1143-0). The **-0** is the unchanged dictionary list from X12 or EDIFACT.
- The number of dictionary codes being used (9).
- The number of times this particular code set is used in the guideline (For example: 1 usage, no usage, etc.).

Bottom Pane – Details View

When an element with codes is selected in the top pane, the Code Values tab in the bottom pane lists the codes.



Code Set Header

The code set header line shows:

- The nesting level for the element selected in the top pane. In the example above, the element is in a segment that is in a loop.
- The element number (element 146 in the example above).
- The transaction or message (850 in the example above).
- The number of used codes (31 in the example above).
- The number of code sets in this guideline for this element (1 in the example above).

Code Set List

The code set list shows:

- **Used codes** have black text and bright red icons. These codes are from the element dictionary and therefore generally from the underlying published standard.
- **Unused codes** are faded or do not display (depending on the setting of **View | Show Unused**). These are also dictionary codes, but they are not used here in this guideline.
- **Local codes** have bold text and contain a small **L** in the red icon. Local codes have been added by the guideline's developer.

Showing Codes

To show all codes, whether used or not, click in the bottom pane and choose **View | Show Unused**, press *F2,* or click the magnifying glass button on the Code Values toolbar. Note that this only affects the Code Values tab in the bottom pane (Details view); it will not change anything in the top pane (Guideline View).

To view an explanation, and review or create notes for a code, double-click on its ID in the left-hand column of the Code Values pane. Its Definition and Explanation cannot be changed, but you can add level notes to the value.

Customizing the Code Values List

The **Code Values** tab initially displays a full list of dictionary codes from the underlying standard.

You can modify this list by:

- Marking codes used or unused.
- Adding or editing notes.
- Adding, editing, and deleting your own local codes.

Adding or Importing Codes

Local codes are those you add to a guideline. They are not in the element dictionary and are not part of the published standard.

You can add local codes to the composite or segment dictionaries, or to the transaction set or message. They affect only the current location (if in the transaction set or message) or follow the usual hierarchy of inheritance if attached in the dictionary. See Working with Codes in the Dictionary for more information on the dictionary.

Adding a local code

1. In the Code Value pane, click the  toolbar button or right-click anywhere in the list.
2. Type a unique ID.

   The ID will be black if it has the correct length and type, and does not already exist. It will be red if it is illegal:

   Codes can contain numerals 0-9, uppercase letters A-Z, - and /. The X12 code for *Mutually Defined* must be Z's filled in to the minimum length.
3. Press *Tab* and type a unique definition. Your local code will be alphabetized among the dictionary codes.

When you change the code list from the way it appears in the element dictionary, you are creating a *code set*, a user-defined set of acceptable codes. Local values are not automatically added to the dictionary, but you have ways to re-use them. See Code Sets.

Importing codes

You can import codes from a comma-delimited file.

First, prepare a file containing the codes:

- One code per row.
- Each code line contains the following fields separated by commas:
- Code Value,Description,Explanation,Level 1 Note,Level 2 Note,Level n Note
- Put the codes in the same order in which they will appear in the Standards Editor code list.
- Each item must be in double quotes, like the examples in **CodesToImport.txt** in EDISIM's Samples directory.
- You can use commas and single quotes in the imported text. To get a double quote into your text, use two consecutive double quotes:

To get this in your note: `This value must be “C” or “D”`

Use this in the import file: “This value must be “”C”” or “”D””””

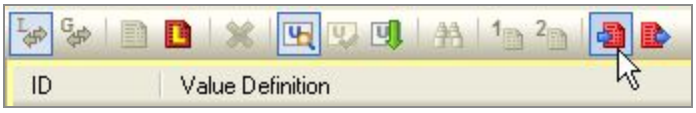
- Add a newline at the end of the last line.

Then, import the codes:

1. Check the length and data type for the element that is to receive the codes. The codes that you import should comply.

   View unused codes with the  toolbar button.

2. Click the **Import Code Values** button on the codes pane:

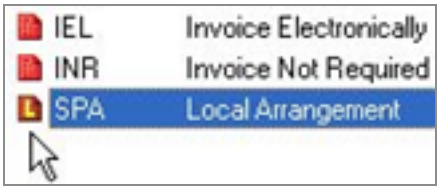
3. At the bottom left, select:

   Whether to overwrite a code if it already exists

   Whether the code values file contains field names in the first row

4. Navigate to the file containing the codes and click **Open**.

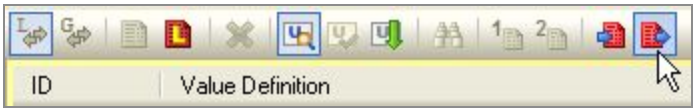
5. Notice the new codes. They will be local codes () unless you are in the Element dictionary:

Exporting Codes

To export a code list into an external comma-delimited file:

1. Go to the element containing the code list.
2. Turn on Show Unused for the code list if you want to include unused codes.
3. Click the **Export Code Values** button on the codes pane:

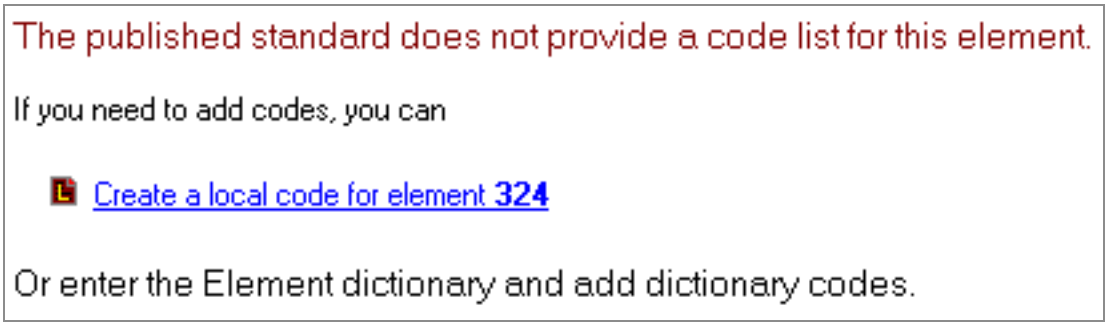
   

4. Set up the options at the bottom left.
5. Choose an output directory and filename and click **Save**.

Adding Codes where none exist

To add codes to an element that has no codes:

1. Click on the element in the top pane.
2. Choose the **Code Values** tab in the bottom pane. You see this message:



3. Click Create a local code…
4. Type the new code's ID and press *Tab*.
5. Type its definition.
6. To add other codes, follow the directions in Adding or Importing Codes.

Adding a Dictionary Code

Caution This is a global change that affects all uses of the element throughout the guideline.

You can add dictionary codes only from the element dictionary:

1. In the top pane, open **Dictionary Objects** and then **Elements**.
2. Click on the element.
3. Choose the **Code Values** tab in the bottom pane.

   If there are no codes for this element, you will see a message box that says “The published standard does not provide a code list for this element.”
4. Click the link to add a new code.
5. If there are other codes for the element, follow the procedures in Adding or Importing Codes.

Deleting Codes

Local code
Select the code(s) and press the Delete key.

Dictionary code
Caution: This is a global change that affects all uses of the element throughout the guideline. Marking unwanted codes as unused is safer.

You can delete dictionary codes only from the element dictionary:

1. In the top pane, open **Dictionary Objects** and then **Elements**.
2. Click on the element with the unwanted code.
3. Choose the **Code Values** tab in the bottom pane.
4. Select the unwanted code and press the **Delete** key.

Code Value Definitions and Explanations

Changing a Code Definition and Explanation Except for local codes, the Definition and Explanation fields are grayed out if you double-click on a code in the transaction set or message.

To change them:

1. Open **Dictionary Objects** and then **Elements** and click on the element.
2. Double-click on the code in the bottom pane.
3. Type the new explanation.

To change a local code's explanation, double-click on its ID in the Code Value tab or right-click on it and choose **Level Notes/Properties**. You can type the new Explanation there.

Changing a Local Code’s Definition or Explanation

To change a local code's definition, click on its definition and type the new one.

To change its explanation, double-click on the code itself.

Warning If the current code set is used elsewhere in the guideline, this change affects all usages.

Using Notes with Code Values

To add or change a code's note, double-click on its ID, select the level, and type the note.

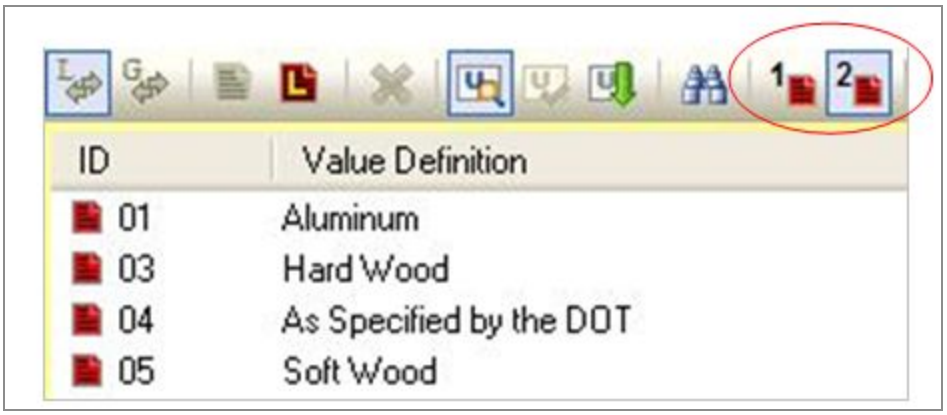
Finding a Code

See Searching and Finding.

Two-Part Codes

If you are using an element with two-part codes, the Code Value toolbar will have buttons to toggle between Part 1 and Part 2 values.

This example shows part 2 for X12 element 103 (see X12-3030 or later| 856 | TD101):



Marking Codes Used or Unused

Marking codes is similar to marking any other item in your guideline.

1. In the top pane, select the element.
2. In the bottom pane, click the **Code Values** tab.
3. In the Code Values pane, select codes that you don't want to use in this location. To select multiple codes, use *Ctrl+click* or *Shift+click*.
4. Use *Alt*-**m**, **Edit | Mark Used/Unused**, or this Code Value toolbar button: 

The Code Value toolbar has an additional button that is useful when marking most code values unused:

1. Click Mark all of the codes values not used 
2. Click **Show Unused** () if necessary.
3. Select only those you want to use.
4. Use *Alt*+**m** to toggle them back on.

Code Sets

Whenever you change a list of codes, and make it different from the element dictionary list, you have created a *code set* that you can use elsewhere in the same guideline.

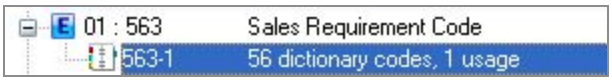
Code Set Numbers

Code sets are identified by unique numbers. To see how they're assigned:

1. Find an element that is used multiple times in the transaction set and that has an unchanged list of dictionary codes.
2. In the top pane, click the plus sign to the left of the element and look at the codes line that is now exposed.
3. In this code line example, element 563 is followed by a 0. The 0 is Standards Editor's ID for unchanged dictionary codes. Code set 0 is the list of codes exactly as they appear in the dictionary.

4. Display the code values pane and mark a few codes unused.
5. When you look at the codes line in the top pane you can see that 563 is now followed by a 1. The codes no longer match those in the element dictionary, so you are using a code set with a different number.

   If a code set had already been set up for element 563 in another location, then the new code set would have taken the next available number.

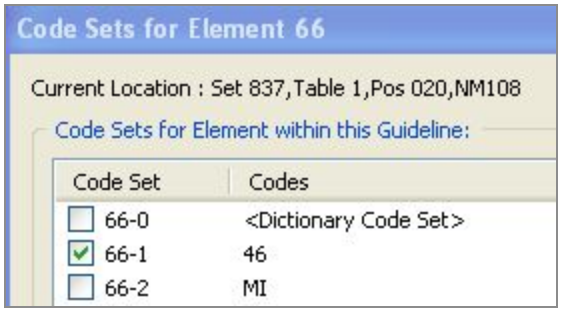
Reusing Code Sets

The same element may appear many times in the same guideline, and you can re-use the customized list of code values in those places. This is fast, accurate, and makes updating them easier.

To use a previously defined code set:

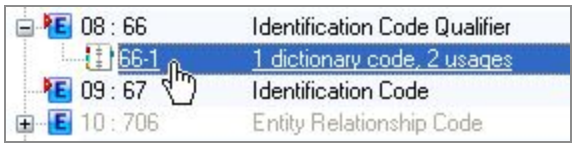
1. Right-click on the element where you want to attach the code set and choose **Select Code Set**.
2. Choose the code set that you want to use. The sets are listed in numerical order, with the dictionary set at the top.

Here we are choosing code set 66-1, which contains code 46:



After closing the box, the contents of the Code Values pane will display the code set. The title bar of the Code Values pane will indicate that the code set is used by other elements.

In the top pane, the element's codes line will show the number of the code set that you chose.



Changing a Code Set

You can change the contents of a code set for *one* or *all* places where it is attached.

1. Go to the element where you want to make the change.
2. Click the **Code Values** tab in the bottom pane.

   Look at the title bar of the Code Values pane. If the code set is used elsewhere, the

title bar will say, "Code set used by *n* other elements." If so, you have a choice about whether the changes will be local or will affect all places where the code set is used.

3. Specify whether code set changes will be local or global:

   Global changes: to have the code set changes affect all usages throughout the guideline, click the  button. Do this before making the changes to the code set. The existing set will be modified and the code set number (see Code Set Numbers) will remain the same.

   Local changes: to have the changes affect only the current location, click the  button. A new code set with a new number will be created.

   Your setting remains until you select a different item in the top pane.

4. Make your changes to the codes.

Detaching a Code Set

When you *detach* a code set, you remove it from a particular location but do not actually delete it from the guideline. This allows it to be used in other locations.

To detach a code set and revert to the dictionary codes for a particular element:

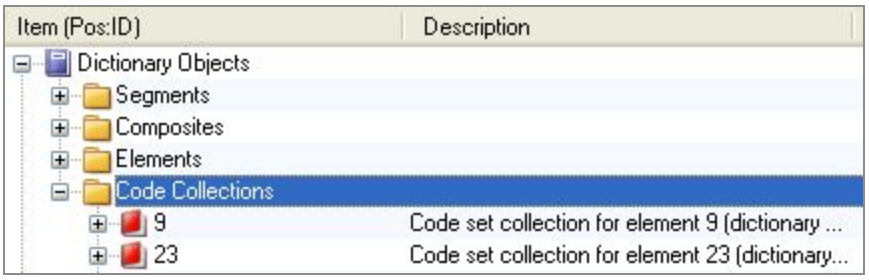
1. Right-click anywhere in the list of codes.
2. Choose Select Code Set.
3. Select **Dictionary Code Set**, and then click **OK**.

   This element will then use the dictionary codes. The change affects this element in this location only.

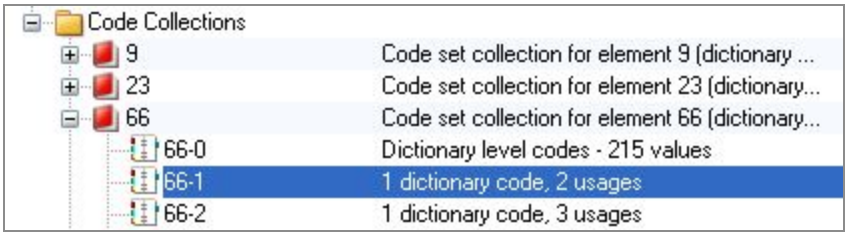
When you *delete* a code set, you remove it from the guideline altogether. Before deleting a code set, you must detach it from all places where it is used. (See Detaching a Code Set above.)

To delete a code set:

1. Open **Dictionary Objects**, the top line in the top pane, and then **Code Collections**.

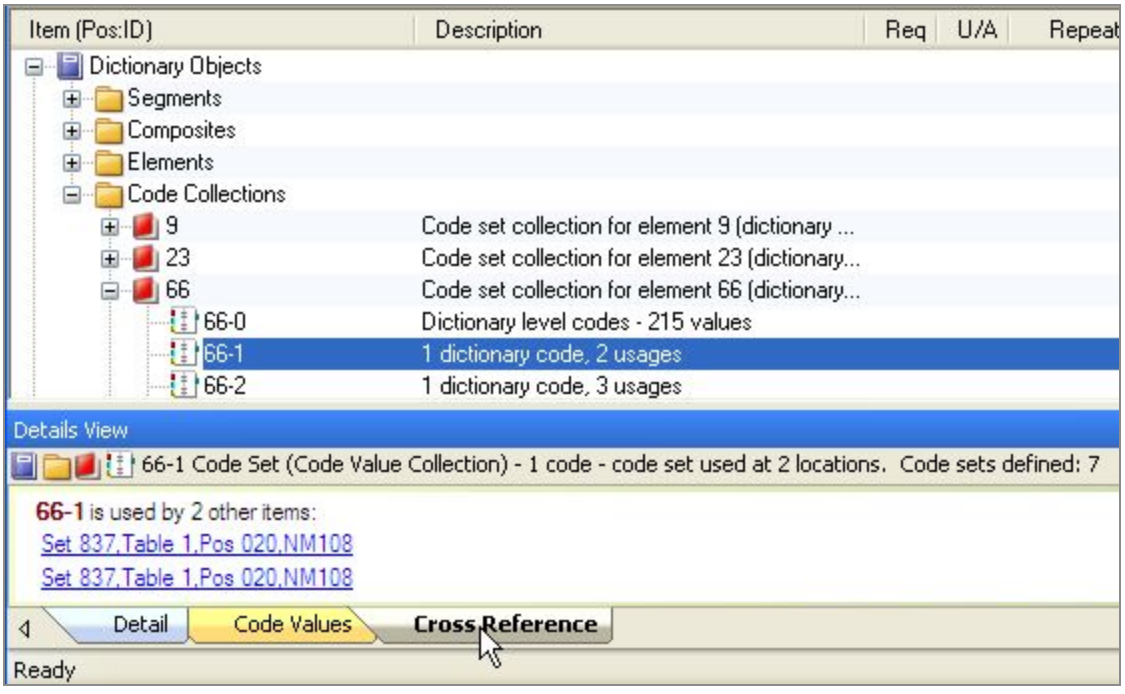


2. Expand the element with the unwanted code set.
3. Select the line representing the code set that you want to delete.



Be sure that you have the correct code set. If it is used anywhere in the guideline, the code set line will say something like, “1 dictionary code, 2 usages.” The “2 usages” indicates that the code set is used in two places and you'll need to detach it first.

4. Click the **Cross Reference** tab in the bottom pane to see where it is used.



5. Click one of the links to jump to that item in your guideline.

6. Detach the code set (see Detaching a Code Set), and then click the back button on your toolbar  to return.
7. Repeat the detaching process until you have an unused code set.
8. Highlight the set you want to delete in the Code Collections and press the *Delete* key.

   You cannot delete code set 0, the full list of codes from the element dictionary.

   You will see a message asking you to verify the deletion. If you don't see this message and nothing happens, your code set is still in use somewhere.

Empty Code Sets

If an element has code values, but you mark them all unused, you have created an empty code set. You are saying that there should not be specific codes for this element and that any value that matches the Type, Min, and Max will be acceptable.

The element's code line in the top pane will report **No code values, *n* usage(s)**.

Code Printing in Doc Builder

Since your own code sets do not appear in any published manual, Doc Builder *always prints your code sets.*

To save space, Doc Builder does not print the full list of dictionary code values on the segment detail pages, since this information is available in manuals, in Standards Editor, and in Standards Reference.

Instead, this message appears for unchanged code lists: “Refer to Data Element Dictionary for acceptable code values.”

Doc Builder’s **Dictionary Element** option will print all dictionary codes for all used elements. The list appears at the end of the document and adds many pages to the output.

Printing all Dictionary Codes

To print all dictionary codes for an element, mark a code unused and then mark it used. The codes line (below the element in the top pane) should show a code set other than 0: dictionary codes. Since this is now a code set, it will print.

Be sure to consider how long this will make your Doc Builder output.

Preventing the Printing of all Dictionary Codes

To print the Doc Builder message referring to the dictionary, do not change the codes in Standards Editor at all. The message will print in Document Builder.

However, let's say you have already chosen codes and therefore created a code set. In that case, right-click on the element, choose **Select Code Set**, and choose the top code set.

Application Value Lists

An **application value list** is similar to a code values list in that it contains acceptable values for an element.

Unlike code values, application values:

- Can contain up to 250 characters, upper or lower case (Analyzer and EDISIM Validator will check their capitalization), including special printable characters such as hyphens, dollar signs, embedded blanks, etc.
- Can include regular expressions to specify a pattern that data must match.
- Are not part of the underlying standard.
- Can be attached to different elements (for example, the same application list can be attached to an element 93 and an element 352).
- Do not show up in the Code Values pane.

You can later:

View them in Standards Reference.

- Print them in Doc Builder (When the application value list is conditionally used in a business rule, Doc Builder does not print it).
- Use them as values in TDG.
- View and migrate them in Comparator.
- Have Analyzer and EDISIM Validator check for them.

Here's a quick overview of setting up or working with an application value list:

1. Highlight the element in the transaction set or message.
2. Choose **Edit | Advanced | Application Values**.
3. If you are creating a new list:

a. Type a list name in the **Value List** field.

b. Type a Description.

c. In the Value line, type the value and click **Add**.

d. Continue adding other values.

e. **When finished, click Attach.**

4. **If you are editing an existing list:** The top pane will show all of your application value lists. Click on the one that you want to edit. Then, edit the contents of the lower pane.

You'll see "VR" in the Indicator column of your transaction, signifying there's an application value list attached.

You can easily attach a list elsewhere by highlighting another element, then choosing **Edit | Advanced | Application Values**, clicking on the name of the desired list, and choosing **Attach**.

Application Value Lists Tutorial

Creating an Application Value List

1. Start a new guideline using **X12-5040**, **810**, and open to the **0200:BIG** segment in Table 1.
2. Highlight element 04:324 and choose **Edit | Advanced | Application Values.**
3. With the cursor in the Value List field, type **PO Number**.

In the Description field, type **Kaver Corp Purchase Order Number** and press *Enter*. This description is important since it will appear in Analyzer and EDISIM Validator messages. Do not include special characters, such as quotation marks, in the Description. Spaces are OK.

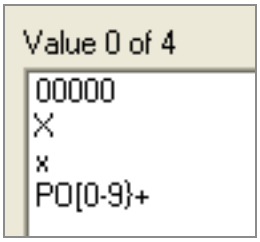
4. The cursor moves to the Value line at the bottom. Type these values, pressing *Enter* after each one:
   - 00000
   - X
   - x

These three literal values should now be in the list.

Now we'll add a regular expression. This is a pattern that describes data.

1. Type: **`PO[0-9]+`** in the Value field to allow data that contains the letters PO, followed by any number of digits (up to the max for the element).
2. Click the **Regular Expression** check box and press *Enter* twice.

This application value list says that our data can consist of `00000`, `X`, `x`, or any value starting with `PO` followed by numbers.



3. Our list is complete, so choose **ATTACH**. The box closes and the Indicator column contains **VR**.

Re-using an Application Value List

You can re-use an application value list on another element:

1. Open the **REF** segment at 0500.
2. Right-click on element 127 and choose **Application Values**.
3. Click on **PO Number** and then **Attach**. This list is now attached to this element also.

Modifying an Application Value List

You can modify an application value list, and changes will carry through to any place to which the list is attached.

1. Choose right-click on any element or segment and choose **Application Values**. Choose the **PO Number** list. In the Value line at the bottom, type the value **99999** and press *Enter*.
2. Close the Value box.
3. Now right-click on BIG-04, choose **Application Values**, and click on **PO Number**. All five values are present.

Working with Application Value Lists

To do this ...	Do this ...
Open the application value list box	Choose **Edit** | **Advanced** | **Application Values**. Right-click on an element or segment and choose **Application Values**.
Creating a new application value list	See Application Value Lists Tutorial.
Attaching an existing application value list to another element	1. Right-click on the element where the value list is to be attached. 2. Click on an application list name. 4. Click **Attach**.
Detaching the list from an element	1. Select the element. 2. Open the application value list box. 3. Select the list. 4. Click **Detach**. This does not affect the list's attachments to other elements, and it does not delete the list. You can detach a list only from where you attached it; otherwise, the Detach button will be faded.
Deleting an application value list	1. Open the application value list box. 2. Click on an application list, and choose **Delete List.** If the list is attached anywhere, you will be notified and asked if you want to continue.
Seeing where an application value list is attached	1. Open the application value list box. 2. Click on an application list. 3. Click **View Refs....**

To do this ...	Do this ...
Modifying an application value list	1. Open the application value list box. 2. Click on an application list name. 3. Make the changes, as follows: **To change a value** Click on the value to change in the bottom pane. Type the changes in the Value line, and click Modify. **To delete a value** Click on the value to be deleted in the bottom pane. Click Delete. **To add a value** Type the new value in the Value line at the bottom. Click Add or press Enter. These changes will affect all places where the list is attached.
Adding a regular expression (pattern)	See Regular Expressions.

Regular Expressions

When you highlight an element and choose **Edit | Advanced | Application Values**, you can add a pattern to use for matching. These are called regular expressions.

Standards Editor can use most regular expression metacharacters, such as:

^	value can contain nothing before the pattern
$	value can contain nothing after the pattern
.	any character

+	continue to end of element
[*xxx*]	set of characters
[^*x*]	not *x*

Standards Editor does not recognize the {n} multiplier.

Several typical examples follow. Please refer to a regular expressions book for more information.

Example 1 – mixed numerics, literals, and alphabetic

^[0-9][0-9]-[A-D][A-Z]$

Where:

^	Nothing can appear before the values that match the pattern. The value must start with a digit.
`[0-9][0-9]`	The first and second positions must be numeric.
-	means the third position must be a hyphen.
`[A-D]`	The fourth position must have an upper-case alphabetical character from A-D.
`[A-Z]`	The fifth position must have an upper-case alphabetical character from A-Z.
$	Nothing can appear after the fifth position.

Example valid value: `12-BB`

Example 2 – all numeric

^[0-9]+$

Where

^	Nothing can appear before the values that match the pattern.
[0–9]	The value starts with a digit.
+	Any number of digits can follow up to the max length of the field.
$	Nothing else can follow the digits.

Example valid values: `1` or `78291`

Example 3 – three digits

^[0-9][0-9][0-9]$

This must be three digits.

Without the ^ and $, then as long as that three digits are found anywhere in the data, it will match.

Example 4 – three alphabetics

For a 3-position alpha lowercase field:

^[a-z][a-z][a-z]$

For a 3-position alpha uppercase field:

^[A-Z][A-Z][A-Z]$

Example 5 – three alphabetics or numerics or combination

For a 3-position alphanumeric uppercase and lowercase field, with no spaces or other special characters:

^[0-9A-Za-z][0-9A-Za-z][0-9A-Za-z]$

Example valid values: `12b` or `a0z`

Example 6 – three numerics, uppercase or lowercase alphabetics commas, and periods

^[0-9A-Za-z,.][0-9A-Za-z,.][0-9A-Za-z,.]$

If you allow spaces also, for the middle character:

^[0-9A-Za-z,.][0-9A-Za-z,.][0-9A-Za-z,.]$

Example 7 – up to three numerics

Make three separate regular expressions in the same application value list. If the data matches any of the regular expressions in the list, it will pass analysis:

^[0-9]$

^[0-9][0-9]$

^[0-9][0-9][0-9]$

Example 8 – value starts with ABC

The value starts with ABC and can have other characters after it:

^ABC

Example 9 – value ends with ABC

The value ends with ABC and can have other characters before it:

ABC$

Example 10 – ABC appears somewhere in value

The value contains ABC and can have other characters before or after it:

ABC

Example 11 – decimal number that cannot be negative

The value cannot start with a minus sign. It can have digits and a decimal.

^[^-][0-9.]+$

Example 12 – only digits and capital letters can be used (no spaces)

The value must consist of digits and uppercase letters up to the maximum length.
`^[0-9A-Z]+$`

Example 13 – start with three digits, then a hyphen and other digits or numbers

The value must start with three digits and a hyphen. It can then have any other digits or capital letters up to the maximum length.

```
^[0-9][0-9][0-9]-[0-9A-Z]$
```

Example 14 – First character can be letter or digit, then all digits

The first character of an account number MAY be an uppercase letter but the rest must be digits.

```
^[0-9A-Z][0-9]+$
```

Example 15 – Must have a space in the value

There must be a space somewhere in the value, or the entire value can be one or more spaces. The regular expression consists of a space enclosed in brackets.

```
[ ]
```

Adding Items

You can insert and delete transaction sets or messages, segments, tables, loops, and groups into your guideline or MIG.

In addition, you can define a new, empty transaction set or message in your guideline or MIG, and then add segments to it from the dictionary.

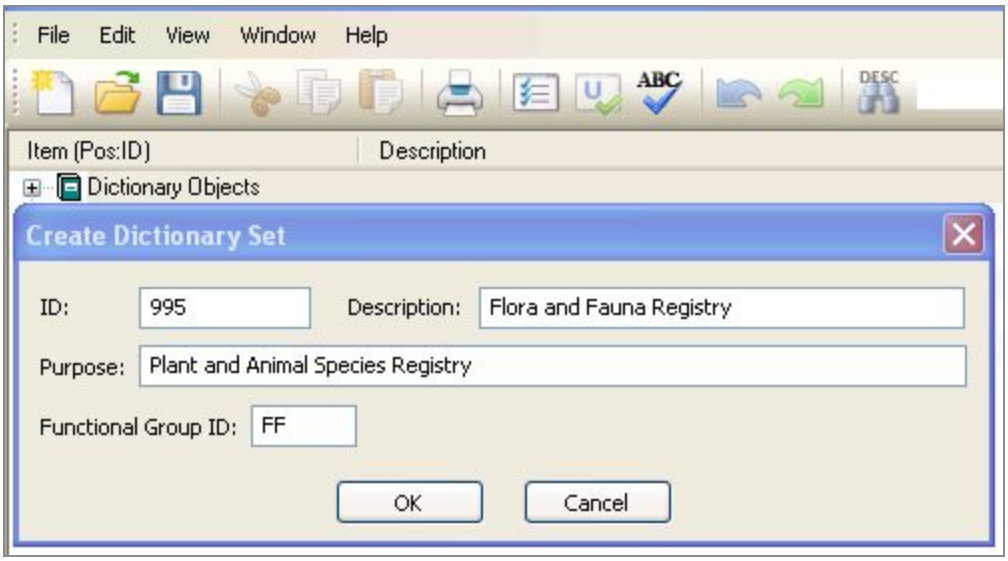
Creating a New Transaction Set or Message

Standards committees may need to create a new transaction set or message. To do so:

1. Create a new guideline or MIG based on the version you want to use for its basis. Do not select a transaction set to put in it.

   If you are adding a transaction to an existing guideline or MIG, open it.

2. Click on **Dictionary Objects** in your top pane.
3. Choose **Edit | Create New Item | Transaction Set**.
4. Fill out the Create Dictionary Set box as described below.



ID

Type a transaction set or message identifier that is unique within this standard, guideline or MIG. It is 3 numeric digits for ASC X12 or 6 alphabetic characters for EDIFACT. For X12, use this ID as the value in the first element within the transaction set or message header segment. For EDIFACT, use it in the second element.

Description

Type a description of your own choosing.

Purpose

Type the boilerplate text explaining the purpose of this transaction or message.

Functional Group (X12 only)

In most cases, the functional group ID is a 2-character alphabetic code that is unique within the standard. This would be used in the X12 GS-01 segment. EDIFACT standards do not have functional group IDs.

When you click **OK**, the ID and description will appear along with the others transactions in the top pane. Initially, it will contain no segments.

Inserting a Segment into a Transaction Set or Message

Before you start The segment must already be in the dictionary.

To add a segment:

1. Be sure that **View | Show Unused** is on.
2. Right-click on the line above where the insertion should take place and choose **Add Item | Segment**.
3. Using the narrow scroll bar on the list, choose the segment.
4. If desired, type a new description.
5. Set its **Req** column to the requirement.
6. Set its **U/A** column to the requirement for your guideline or MIG.
7. Set the **Repeat** column to the number of times it may appear at this location.

Inserting a Loop into a Transaction Set

Before you start The first segment in the loop must already be in the dictionary.

If you are working on an X12-based guideline, you can insert loops in the top pane. (For EDIFACT groups, see Inserting a Group into a Message.)

What You Get when Inserting a Loop

Each loop must have at least one segment. Therefore, when inserting a loop, you also select a segment to insert. If you insert an N1 loop using all the defaults you get the following:

The top line is the loop header, where you are asked to select the repeat count.

The second line, which contains the N1 segment, shows:

6400	The position of the first segment, halfway between surrounding segments.
N1	Segment ID.
Name	Description automatically inserted when Seg. ID N1 was chosen.

O	X12's default Requirement Designator, Optional.
1	Maximum repeat for the N1 segment (as opposed to the Loop Repeat count). This is always 1 for the first segment in a loop.

You can insert other segments in the loop by following the directions in Inserting a Segment into a Transaction Set or Message.

How to Insert a Loop

Loop insertion is similar to segment insertion. Nested loops are acceptable.

1. Highlight the item immediately before where you want the loop to be.
2. Be sure that **View | Show Unused** is on.
3. Choose **Edit | Add new | Loop**.
4. From the drop list, choose a Seg ID for the first segment in the loop. Then fill out the other fields for which you do not want to accept the defaults. See Inserting a Segment into a Transaction Set or Message for detailed information.

Add more segments as necessary.

To add a loop below another loop, close the existing loop and click on its loop header before adding.

To add a loop within another loop, click on the segment above where the loop is to be inserted before adding.

Hints about HL Loops—X12 Only

Use your HL loops as follows so that all parts of EDISIM will understand them.

In Standards Editor

Edit the code values for each HL-03. To do this, highlight the element, use **Edit | Code Values** and mark as unused all code values but the one for that particular instance of the HL loop.

Two ways to get new HL loops in Standards Editor:

1. Copy and paste an existing HL loop and then customize it.
2. Use **Edit** | **Add new** | **Loop** to insert an HL loop, then insert segments into it.

You can click each HL segment and change its name to reflect which type of HL loop it is.

In Analyzer and EDISIM Validator

Analyzer and EDISIM Validator will look at the value in the data's HL-03 and then match it up with those in the HL segment, thus analyzing against the correct HL loop. Analyzer and EDISIM Validator also test the parent-child relationships in HL loops.

Inserting a Group into a Message

You can add groups to EDIFACT-based MIGs. This is similar to inserting a loop, as described in Inserting a Loop into a Transaction Set with a few differences, as noted here.

What You Get When Inserting a Group

Each group must have at least one segment. Therefore, when you insert a group, you also select a segment to insert. If you insert a group using all defaults and choose NAD as the first segment in it, the following lines will be inserted:

The top line shows:

0085	Position number of the group; appears in MIGs based on D94A and later.
1	Group number, which was automatically inserted. It is 1 because it is the first group. All groups after it are automatically renumbered. Alternate definitions of the same group re-use the same group numbers if one immediately follows the other. For instance, if you insert a NAD loop right after an existing NAD loop, they both will use the same group numbers. This helps to keep the group numbers in alignment with those in the originating standard.
Name...	is the NAD segment's name. It was automatically inserted when the NAD was

	chosen.
C	is the status for the group: Conditional.
1	is the Group Repeat Count, the number of times the group can appear here. Default is 1 and indefinite is >1. The second line contains the NAD segment:
0086	is the first segment's position.
NAD	is the segment tag.
Name...	is the NAD segment's name. It was automatically inserted when the NAD was chosen.
M	is the NAD segment's status, which is always Mandatory for the first segment in a group. This means the segment is mandatory if the group is used
1	is the repeat for the NAD segment (as opposed to the Group Repeat Count). It must be 1, since this is the first segment in a group

How to Insert a Group

1. Click on the segment or loop where you want to insert the new group. The insertion goes below the item highlighted.

To insert a group below an existing group, close the existing group and click on its header.

To insert a group within an existing group, click on the segment above where the group is to be inserted.

2. Choose **Edit | Add New | Group**.
3. Select the segment.

The steps that you follow to insert a group are similar to the ones used to insert a loop, as described in Inserting a Loop into a Transaction Set with these differences:

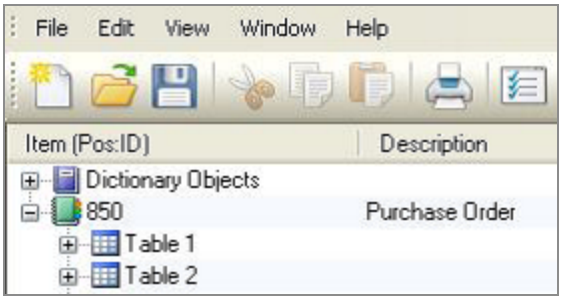
- A group header has a status; a loop header does not have a requirement designator.

- A group has separate status for the group as a whole, and for the first segment in a group. If the group's status is optional, this means that the group can be either included or not. The first segment's status is always mandatory, which means that it must be included if the group is included.

While the Req. field refers to the status of the published standard, you can set up your own requirement by using the User Attributes column. For details, please see Requirement Designators and User Attributes.

Inserting a Table

Table insertion is similar to segment and loop insertion, but you must close up the top pane so that the lowest branch is a table.



Each table must have at least one segment. Therefore, while inserting a table, you also select a segment to insert.

1. Right-click on the table above where you want the insertion to go and choose **Add New | Table**.

If Standards Editor informs you that "The position number is out of boundary," you need to change position numbers in one or more existing segments so there will be room to insert something. For details about resequencing, see Position Numbers and Resequencing.

2. Choose the segment that will start the table. Customize the segment as needed.

All following tables will renumber themselves automatically.

See Inserting a Segment into a Transaction Set or Messagefor more information on adding items to the table.

Inserting an Element or Composite in the Transaction Set or Message

Because a segment must have the same elements in the same positions throughout the guideline or MIG, you must go to the dictionary to add or delete elements or composites in a segment.

These changes will then appear in all transaction sets or messages in the guideline or MIG.

Please see Adding an Existing Composite to a Segment in the Dictionary and Adding an Existing Element into a Segment in the Dictionary.

Position Numbers and Resequencing

You can change position numbers for segments and groups, but not for elements and composites.

Caution: If this guideline or MIG will be auto-loaded into a SEF-ready translator, use caution in resequencing. Some translators use the position numbers of the underlying standard to identify segments.

Composite Position Numbers

A composite takes up only one position number in a segment, regardless of how many subelements it contains. The subelements have their own sequence numbers within the composite, as follows.

When the BGM segment in this example is expanded, the top pane shows:

Where:

Pos	Tag	Meaning
01	C002	first item in the BGM, a composite
01.01	1001	first subelement in the composite
01.02	1131	second subelement in the composite

Pos	Tag	Meaning
01.03	3055	third subelement in the composite
01.04	1000	fourth subelement in the composite
02	1004	second item in the BGM, a composite
03	1225	third item in the BGM, an element
04	4343	fourth item in the BGM, an element

Reusing Position Numbers

In general, position numbers should not be reused. For example, you should not have two segments with different IDs or tags at 030 in the same table.

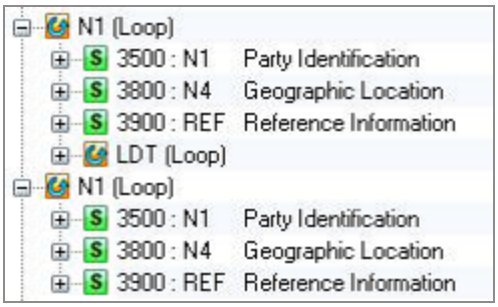
The one exception: two consecutive segments with the same ID or tag, or two consecutive loops or groups with the same trigger, can have the same position numbers. For example:

Notice the two consecutive REF segments, both at 0500. The duplicate segment could have been copied and then pasted, or it could have been inserted from the dictionary (**Edit | Add Item**).

The user has probably customized these two segments differently, perhaps in their codes and in which elements are used. Therefore, it conveys more information than having one segment with a repeat of 2.

Reusing the position numbers helps keep the segments aligned with the position numbers in the published standard on which it is based.

A similar situation exists with two consecutive loops or groups that have the same trigger segment.



If you copy and then consecutively paste loops or groups that have nested loops within them, Standards Editor detects that these are alternates and reuses segment position numbers. If two consecutive groups appear to be alternates, the group numbers are reused.

How to Resequence Segment Position Numbers

To change an *individual* position number, click on the segment and make the change in the Position Number field in the Detail bottom pane (see Detail Tab).

You can resequence position numbers for a *range* of consecutive segments within a table. You cannot resequence across table boundaries unless you are using an EDIFACT version (D94A or later) that has continuous position numbers across tables.

To resequence a range of segment:

1. Be sure that **View | Show Unused** is turned on.
2. Select all segments to resequence.

Use the normal Windows methods of clicking the first segment in the range and then using *Shift*+click on the last, or using *Ctrl*+click on each segment to be included.

3. Choose **Edit | Advanced | Resequence...** (or *Ctrl*-R) to display the Resequence Position Numbers box.
4. Type a starting position number for the first segment.
5. If the entire table is not being resequenced, be sure to consider the position numbers of the segments that are not included, even those marked as not used.

Change the increment, if you do not want to use the suggested one.

Cut, Copy, and Paste

Copying Text

To copy text from Standards Editor notes, fields, etc.:

1. Select the text and press ***Ctrl*-C**.
2. Paste it into a word processor document, spreadsheet, or other Windows programs by using that application's paste feature or ***Ctrl*-V**.

To copy text into Standards Editor notes, fields, etc.:

1. Select the text in the word processor document, spreadsheet file, etc.
2. Use that application's copy method.
3. Go to Standards Editor and click in the note or other area.
4. Press ***Ctrl*-V** to paste.

Special characters in pasted text

- When pasting into single-line fields, tabs are eliminated and new lines are converted into a single space.
- When pasting into multi-line fields, and **Wrap Soft Returns in Pasted Text** is turned off (under **File | Preferences | Appearance** tab), tabs and new lines are maintained.
- When pasting into multi-line fields, and **Wrap Soft Returns in Pasted Text** is turned on, tabs are maintained, single new lines are converted to a single space, and multiple consecutive lines are maintained.

Doc Builder gives you two choices for displaying tabs:

1. Convert tabs to a user-selectable number of spaces.
2. Advance to the next pre-set tab stop. Doc Builder tab stops are 1/3" apart.

Doc Builder's HTML output does not offer pre-set tab stops.

Cutting, Copying, and Pasting within a Guideline or MIG

You can cut or copy one or more segments, loops, or groups, and paste it/them into the same transaction or message.

Steps include:

1. Select the segments and/or groups to copy in the top pane. If you select a LOOP STARTS or GROUP STARTS, the whole loop will be cut or copied.
2. Choose **Edit | Copy or Edit | Cut**.

   Paste is only available after a cut or copy and when **View | Show Unused** is on. Original position numbers are reused in the pasted segments. If you need to resequence them, see Position Numbers and Resequencing.
3. Highlight the segment, group or loop, table heading, etc. where you want to insert the selection (insertions always go below the highlighted line).
4. Choose **Edit | Paste**.

Group Numbers (EDIFACT): Alternate definitions of the same group re-use the same group numbers if one immediately follows the other. If you copy / paste a NAD loop right after the existing NAD loop, they both will use the same group numbers. This helps to keep the group numbers in alignment with those in the originating standard.

Copying Standards, Guidelines, and MIGs

To copy an entire standard, guideline, or MIG, use **File | Open** to open it, then use **File | Save As** to save it to a new name.

Copying between Guidelines

You can copy and paste these between guidelines/MIGs:

- Transaction set or message
- Loop or group

- Segment (business rules do not copy with their segment)

To copy:

1. Click on the segment, loop header, or transaction set/message line.
2. Choose **Edit | Copy**.
3. Go to the other guideline or MIG and click on the line above where the insertion is to go.

   If it is to be inserted below a loop, close the loop and click on its header.

   If it is a transaction set or message, click on the Dictionary Objects line.
4. Choose **Edit | Paste Special**.
5. Save and re-open your guideline.

Deleting and Marking as Not-Used

If you are defining a guideline or MIG (to be used between your own company and a trading partner, for instance) you will want to preserve all parts of the underlying standard, but choose which ones you want to use and omit. Therefore, mark items **Not Used** liberally and **Delete** rarely (usually to fix erroneous copying). Also, make most of your changes in the transaction set or message rather than in the dictionary.

If you are defining a new standard (such as if you are on a standards committee designing a new transaction set or message): include only what will be in it. Use **Delete** liberally. Make your changes in the dictionary as well as in the transaction sets or messages.

Item to delete	Guideline or MIG	Standards Committees
guideline	Use **File	Delete**.	Use **File	Delete**.
transaction or message from guideline	With guideline open, use **Edit	Delete**.	With guideline open, use **Edit	Delete**.

Item to delete	Guideline or MIG	Standards Committees
segments loops groups	Mark not used in transaction set or message.	Can delete from transaction set or message.
elements composites	Mark not used in transaction set or message. Cannot be deleted from segment in transaction set or message due to element's position numbers within segment.	Can delete elements and composites from segment in segment dictionary. Can delete subelements from composites in composite dictionary. Can delete composite from composite dictionary. Can delete element from element dictionary.
values	Attach code set or application value list to elements in transaction set or message to affect individual location. Attach codes or application value lists in segment, composite, or element dictionary to be default for that element.	Attach code set or application value list to elements in transaction set or message to affect individual location. Customize codes or application value lists in segment, composite, or element dictionary to be default for that element. Delete unwanted codes from the element dictionary by marking them as Not Used.

Marking Segments, Composites, and Elements as Not Used

You can choose one of the following to reflect the requirement as agreed upon by you and your trading partners:

- Used (Optional)
- Not Used

- Must Be Used (Required)
- Recommended (Advised)
- Not Recommended
- Dependent

For details, please see Requirement Designators and User Attributeson page Error! Bookmark not defined.

You can choose **Not Used** to omit:

- A loop, group, or segment from a transaction or message.
- An element or composite from a segment, either in the transaction set or message, or in the segment dictionary.
- A subelement from a composite, either in the transaction set or message, in the segment dictionary, or in the composite dictionary.

Marking One Segment, Composite, or Element as Not Used

To omit one element, composite, or segment:

- Click on it and then choose **Edit | Mark Used/Not Used** (or use *Alt+M*).
- Or, click on it and choose **Not Used** from the drop list in either User Attributes fields of the two screens.

An *N* will display in the User Attributes fields of both panes and the line will be faded. This has no effect on mandatory items.

Changing User Attributes for Multiple Loops, Groups, Segments, or Elements

1. Highlight the items to be affected by holding down the *Ctrl* key while clicking each one. To select a range, choose the first segment, composite, or element. Then go to the last one and use *Shift*+click.
2. Choose **Edit | Mark Used/Not Used** or press *Alt+M*.

You should see items you chose marked with *N* and faded.

If they do not change, look in their Req. column. Items with mandatory requirements cannot be changed to not used.

Segments in Unused Loops or Groups

You can mark either the loop header or the first segment within a loop as Not Used to affect the entire loop.

All segments and subloops within the loop are unused and are therefore faded, but only the loop header or the first segment will have an *N* in its U/A field.

Composites and Elements in Unused Segments

If you mark a segment as unused, all composites and elements in the segment are considered unused. The segment will be faded and marked with an *N* in the U/A column.

However, the composites and elements in the segment will not necessarily be marked with an *N*. They will display their own user attributes but will be faded.

Subelements in Unused Composites

If you mark a composite as not used, it is faded and an *N* displays in the U/A column. Its subelements are faded to show that they are part of a composite that is not used.

However, the subelements are not necessarily marked with an *N*. They will display their own user attributes.

Displaying Not-Used Items

You must have **View | Show Unused** selected to perform any structural activity such as inserting, pasting, or resequencing.

Can't Set Something Back to Used?

If an item remains faded in spite of having its user attributes set to used or must be used, it is probably part of something that is unused. For example, a segment marked as used will remain faded if it is part of an unused loop.

Deleting Guidelines and MIGs

Caution: Do not delete a standard, guideline, or MIG that has Test Data Generator models using it. This would break the models. If you accidentally do this and need help, call TIBCO Foresight Technical Support.

To delete a guideline or MIG:

1. Close it, if it is open.
2. Choose **File | Delete**.
3. In the Delete Standard box, highlight the guideline or MIG to delete.
4. Choose **OK**.

Standards Editor asks for confirmation before actually deleting it.

Deleting TIBCO Foresight-supplied standards is not recommended. They do not take up much disk space, and you risk breaking guidelines or MIGs, Test Data Generator models, etc., that are based on them.

Deleting Transaction Sets or Messages

To delete a transaction set or message from a guideline or MIG, highlight it in the top pane and press the Delete key or select **Edit | Delete**. You will be asked to confirm. You can delete multiple selections.

Deleting Segments, Loops, and Groups

If you are on a standards committee, and are making a new standard, you might want to totally remove a segment, loop, or group rather than marking it as not used.

Highlight the segment, loop, or group, and press the **Delete** key or choose **Edit | Delete**. You will be asked to confirm.

When deletions involve loops or groups:

- You cannot delete a loop trigger segment; delete the entire loop instead.
- If you delete while highlighting the loop or group header line, the entire loop or

group is deleted. This includes any loops or groups nested within it. If it is a group, rather than a loop, subsequent groups are renumbered.

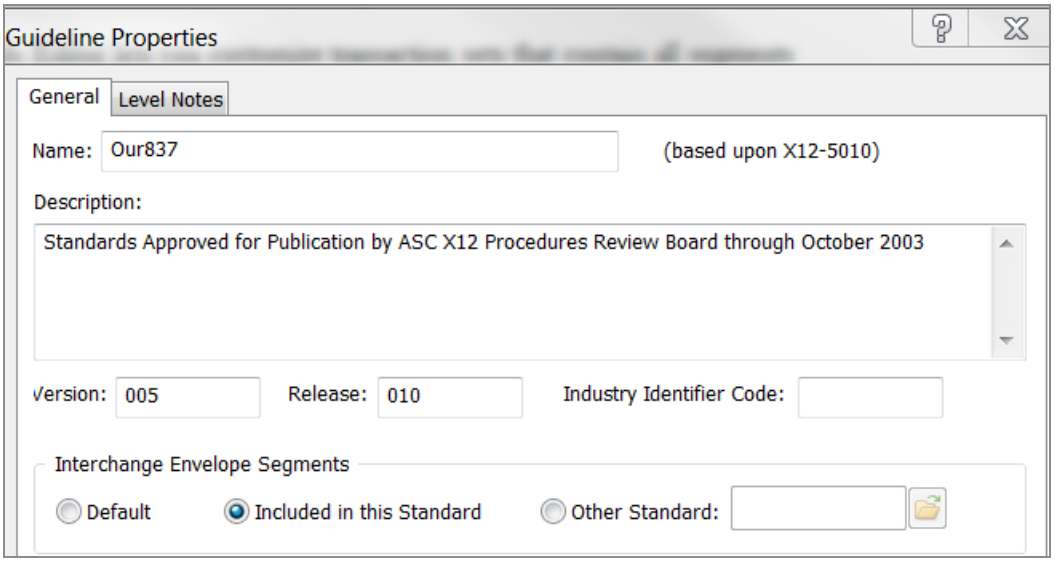
Deleting a Table

A table will go away when you delete all of its segments. You may want to cut and paste the segments elsewhere first. See Cut, Copy, and Paste.

What to Do About Enveloping

Standards Editor lets you customize transaction sets that contain all segments from X12's ST through SE, or EDIFACT's UNH through UNT. This provides a guideline or MIG that will work in Doc Builder, Test Data Generator (TDG), Analyzer, EDISIM Validator, Comparator, and Standards Reference.

In Standards Editor, **File** | **Properties** | **General** tab controls the enveloping.



The three options at the bottom determine how Analyzer and EDISIM Validator will validate the enveloping:

- Enveloping - Default
- Enveloping - Included in this Standard
- Enveloping - Other Standard

Enveloping - Default

This method is the default for X12-3070 and earlier, and for all EDIFACT standards.

It has the following effect:

- If Analyzer or EDISIM Validator sees an ISA in the data, it loads standard X12ICS, which contains generic X12 enveloping.
- If it sees a UNA or UNB in the data, it loads standard UN1ICS, which contains generic EDIFACT enveloping. It analyzes the interchange and group enveloping against the segments in X12ICS or UN1ICS, which cannot be customized.

After getting the VRI (Version, Release, and Industry Identifier Code) from the GS or UNG segment, it looks in the list of guidelines, MIGs, and TIBCO Foresight-supplied standards to find one that matches. If there is any ambiguity, it will ask for the name of a guideline or MIG to use for compliance checking.

Analyzer or EDISIM Validator then compares the GS and GE, or UNG and UNE segments in the data against those in the dictionary of the guideline or MIG being used for the comparison. This step is skipped if these segments are not found in the dictionary.

Therefore, even when using default enveloping, it is to your advantage to customize group enveloping in the Standards Editor dictionary if the segments are there.

Enveloping - Included in this Standard

This method is the default for all X12 standards that have 8-byte date elements. This includes X12-3072 and later.

You can select it for any guideline or MIG that has interchange and group enveloping in the segment dictionary. This includes X12-3040 and later, and all EDIFACT versions.

This setting causes Analyzer or EDISIM Validator to check the interchange and group enveloping in the EDI data against the segments in the Standards Editor dictionary you select the "Use One Standard" during validation.

Otherwise, Analyzer or EDISIM Validator will check against generic enveloping in X12ICS or UN1ICS.

Therefore, when using this method, you will want to customize the interchange and group enveloping segments in the Standards Editor dictionary.

Enveloping - Other Standard

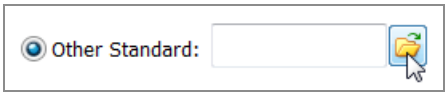
With this method, you can use enveloping as defined in the dictionary of another guideline, MIG, or standard.

1. Create the new enveloping guideline or MIG. The easiest way is to import predefined enveloping standards from EDISIM's AddlStds folder. They exist for many X12 and EDIFACT versions, and are named:

   ICS*xxxx*.SEF

   where *xxxx* is the version. Customize the interchange and group enveloping in the segment dictionary. Save it. For details, see Building an Enveloping Guideline.

2. To refer to these segments, click the Other Standard option at the bottom right on the General tab of the Properties box, and then select the standard within the browse window:



Saving a guideline with Other Standard as the enveloping causes Analyzer or EDISIM Validator to check the EDI data's interchange and group enveloping against the customized segments if you select the "Use One Standard" option.

Otherwise, Analyzer or EDISIM Validator will check against generic enveloping in X12ICS, UN1ICS, UN4ICS, or TRAD93.

Enveloping Tips

Do all enveloping customization in the Standards Editor dictionary.

For all EDIFACT versions and for X12 3040 and later: Interchange and group enveloping segments are in the dictionary.

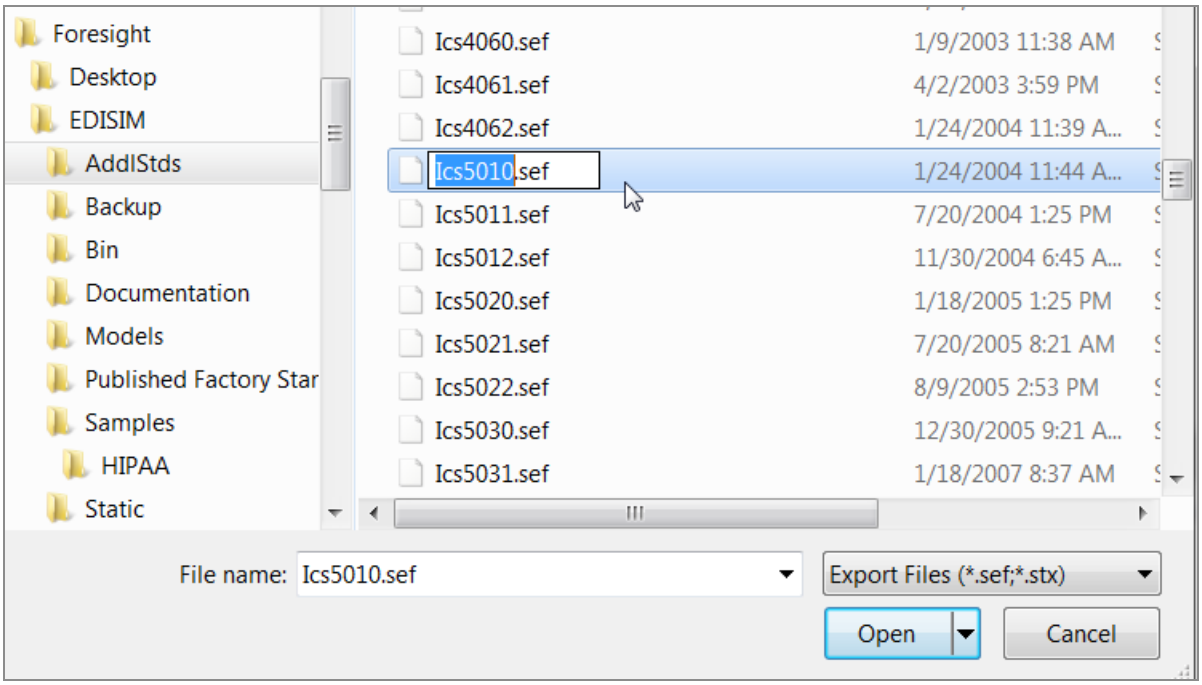
Caution: If you use **Edit | Add item** to insert the enveloping segments around a transaction set or message in Standards Editor, they will print in Doc Builder. However, this will prevent the guideline or MIG from working with other parts of EDISIM.

Building an Enveloping Guideline or MIG

You can import an enveloping guideline or MIG as follows:

1. Choose **File | Import | Import single .SEF and Open**.
2. Navigate to EDISIM's **AddlStds** folder and choose the SEF file that corresponds to the version that you want.

The filename will start with ICS, followed by the version. Example: Ics5010.sef is X12 5010 enveloping. Icsd96a.sef is EDIFACT D96A enveloping.



3. Click **Open**, change the name, if desired, and click **OK**.
4. Delete or mark unused any of the four segments that you do not use.

Customize the enveloping guideline or MIG, as follows (do your editing in the dictionary, because that is where Analyzer or EDISIM Validator look when performing a compliance check).

1. Open **Dictionary Objects | Segments**.
2. Locate one of the enveloping segments in the top pane.
3. Edit elements, codes, etc., as you would in the transaction set or message.
4. Close the Dictionary.

5. Make sure your **File | Properties** enveloping is **Included in this Standard** before you save the file.

You can open and print your enveloping guideline or MIG in Doc Builder.

Example: Using an enveloping guideline or MIG in Analyzer or EDISIM Validator

Let's say you used Standards Editor to define:

MYPO X12-4010 purchase order

ENV4010 4010 enveloping

Before saving MYPO in Standards Editor, tell Analyzer or EDISIM Validator where to find its enveloping: choose the **Other Standard** option under **File | Properties** (or select the **Properties** tab inside the **Save As** box), open the browse window and select your 4010 enveloping guideline ENV4010.

When you check EDI data against MYPO with the **Use One Standard** profile setting, the enveloping segments in ENV4010's *dictionary* will be used.

Using the Save As Box

If you chose **File | Save As**, or if you chose **File | Save** and the guideline or MIG has never been saved, the Save Guideline As box will appear.

Fill it out as follows.

Name

Type a name for the guideline or MIG, up to 8 characters with no spaces. **Avoid special characters** except hyphens and underscores. It is a good idea to incorporate the base standard into the name somehow: **3030INV1**, for example. This will help with identification. This name will appear throughout the EDISIM set of products, wherever you see a list of standards, guidelines, and MIGs.

Description

This field is preloaded with the description from the TIBCO Foresight-distributed standard on which you based this guideline or MIG. It is to your advantage to customize the description, so that you can better distinguish one guideline or MIG from another.

Maximum length is 100 characters. This description will show up whenever you select a guideline or MIG in any EDISIM program.

Properties

Click the **Properties** button and check these settings if you have not set them under your File menu. If this information is not available, for example in the case of a user-defined guideline, the fields are blank.

Version/Release/Industry Identifier (VRI) Code

X12	Version and Release are usually 3 digits each. Industry code is up to 6 alphanumeric characters. Together, these three fields are placed in Element 480 in the GS (group header) segment.
EDIFACT	Version and release are each usually 1-3 alphanumeric characters. Example: D93A has version D and release 93A. 92.1 has version 92 and release 1. These fields are in the UNH and UNG segments.
TRADACOMS	By default, version is **1** and Industry Code is **ANA** (Article Numbering Assn.). There is no release, so this field is unavailable in the Save and Save As box. Standards Editor sets it to **0** (zero).

Normally, you should leave the Version, Release, and Industry Identifier Code lines alone. The exception is if you are on a committee developing an industry standard. If you do change this field:

Doc Builder will show the VRI in the footer (where you can override it) and wherever the document refers to the VRI. Test Data Generator's test data will use it wherever the VRI appears. By default, this is in the GS (X12) or the UNH (EDIFACT) segment. Analyzer or EDISIM Validator should be left with the profile setting of asking for version each time it encounters a functional group header, if you change the VRI. Otherwise, it may compare against the parent standard rather than the one you created. Analyzer or EDISIM Validator expects this VRI in the GS or UNH segment.

If you do change the VRI, create a consistent naming scheme, and make each standard's VRI unique.

Interchange Envelope Segments

This lets you change the enveloping used when checking data against this guideline or MIG. See What to Do About Enveloping.

The Dictionary

Purpose of the Dictionary

You can change your transaction or message hierarchically within the transaction set or message.

Through the dictionary, Standards Editor lets you make global changes. The dictionary provides a full listing of all segments, composites, and elements in the standard, regardless of whether they are used in any of the transaction sets or messages.

The dictionary will be used most frequently by those on standards committees who are developing new standards and transactions/messages. However, others may find it useful to add notes, change lengths, etc., in a more global way than is possible in their transaction set or message.

The main functions of the dictionary are:

- To define a totally new segment, composite, or element.
- To make global changes to code values for an element.
- To change a particular element and have the change show up everywhere that element is used in the guideline or MIG.
- To change a particular composite and have the change show up everywhere the composite is used in the guideline or MIG.
- To change a particular segment and have that change show up everywhere that segment is used in the guideline or MIG.
- To attach a note to any item and have that note show up wherever that item appears.

Please see Capabilities of the Dictionary for a list of all activities possible in the dictionary.

Be Careful! The dictionary is a powerful tool. It can save you a lot of work but the changes you make in the dictionary are fundamental ones that affect your guideline or MIG, which in turn affect all other TIBCO Foresight programs.

Defaults and Overrides

The dictionary provides default properties for items in the transaction set or message. You can override most of these defaults.

Defaults and overrides work as follows. In Standards Editor, properties for each item always originate at the **most basic location** possible (normally one of the dictionaries) and, from there, are passed on to the next higher level. This design is convenient and flexible, giving you defaults at the most basic level, and then letting you override the defaults for specific uses of each item.

The element dictionary is a list of all elements in a standard, regardless of what segments or composites contain them. It sets up: name, description, type, min, max, code values, application values, and notes. These are inherited wherever the element is used in the composite dictionary, segment dictionary, or transaction set/message.

The composite dictionary is a list of all composites in the standard, regardless of what segments contain them. It sets up their name, purpose, semantic notes, comments, syntax rules/dependency notes, and notes, and which subelements are used in the composite. You can create new composites, add existing elements to a composite, delete elements from a composite, or change properties of an existing composite. An element that is part of a composite is called a subelement. In the composite dictionary, you can choose a particular composite and see its subelements. These subelements have inherited their properties from the element dictionary. For subelements, you can change: name, req. des., min, max, notes, user attributes (used, not used, must be used, recommended, not recommended), and code values. Any changes made to the composite dictionary are inherited wherever the composite is used in the segment dictionary or the transaction set/message.

The segment dictionary is a list of all of the segments in a standard, regardless of what transaction sets or messages contain them. It sets up the properties of the segments: name, purpose, semantic notes, comments, notes, syntax rules/dependency notes, which elements and composites they contain, and what codes the elements contain. You can create new segments, or change which elements and composites are in an existing segment. You can choose a particular segment and see its elements, composites, and subelements. These elements and composites have inherited their properties and code values from the element and composite dictionary. Element, composite, and subelement properties that you can change in the segment dictionary include name, req. des., min, max, notes, user attributes (used, not used, must be used, recommended, not recommended), and code values. Any changes made to the segment dictionary are inherited wherever the segment is used in the transaction set/message.

The Code Collection is a list of all codes used in a standard, regardless of what elements, composites, or segments contain them.

Defaults and Overrides

- Settings in the transaction set/message trump all others.
- Settings in the segment dictionary trump those in the composite and element dictionaries.
- Settings in the composite dictionary trump those in the element dictionary.

Where Properties of Items Originate

The following table shows where properties of each item originate. Symbols used in the table include:

O **O**rigin of the item or property. Its characteristics will be passed on to the next level.

Y **Y**es, the item or property can be changed here. Changes will be passed on to the next level.

N **N**o, the item or property cannot be changed here. You may, however, be able to view it here.

	Elem Dict	Com Dict	Seg Dict	UDT seg
Codes				
notes on code	O	Y	Y	Y
definition	O	N	N	N
Value definition	O	N	N	N
Elements				
name	O	Y	Y	Y

	Elem Dict	Com Dict	Seg Dict	UDT seg
type	O	N	N	N
description	O	N	N	N
min-max[1]	O	Y	Y	Y
notes	O	Y	Y	Y
requirement		O	O or Y	Y
user attributes[2]		O2	O or Y	Y2
list of codes	O	Y	Y	Y
Composites				
name		O	Y	Y
purpose		O	N	N
semantic notes		O	N	N
comments		O	N	N
syntax rules/ dependency notes		O	N	N
notes		O	Y	Y
requirement			O	Y
user attributes			O2	Y2
Segments				
name			O	Y

	Elem Dict	Com Dict	Seg Dict	UDT seg
purpose			O	Y
semantic notes			O	N
comments			O	N
syntax notes			O	N
notes			O	Y
elem & comp in seg.			O	N
requirement				O
user attributes				O2

[1] A 0 (zero) max length in the element dictionary means N/A (no limit). N/A is passed on to all other levels but it must originate in the element dictionary. You cannot override another element length with N/A.

[2] If the requirement is not M.

A Quick Tour of the Dictionary

This section assumes that you are familiar with working on a transaction set or message.

Changing Dictionary Elements

Start Standards Editor and choose **File | New**. Choose standard **X12-4030**, **850-Purchase Order**.

Open the 850 transaction and:

1. Open segment **PER** at 060 in Table 1: it is optional.
2. Look at element **93**. It has 1-60 characters.

3. Open the N1 loop, segment **N1** at position 3100.
4. Look at element **93**. It has 1-60 characters.
5. Click segment **N2** at 3200.
6. Look at the two element 93s. They both have 1-60 characters.

That's a lot of 93s, and they all have 1-60 characters.

Let’s pretend that we just found out that we have to change *all* 93s to have 1-40 characters. We could try to find them all, click on each one found, and change the max to 40. But even using the Cross Reference tab and the back and forth arrows, it would take some time. There are 53 references listed.

The easy way is to change it globally in the dictionary.

1. Click on **Dictionary Objects** at the top of the top pane, then open the Elements folder.
2. Scroll down or use the Find box on the toolbar to locate element **93**.
3. Change the Max Length to **40** in the bottom **Detail** pane.
4. Return to the transaction set by clicking the back button on your toolbar until you reach the 850.

Look at element 93 in the PER, N1, and N2 segments. The max is 40 in all instances.

The default max length for element 93 is now 40, everywhere in the guideline (you can use the Cross Reference tab to verify this). If there were other transactions in the standard, they would have been affected also. That is what Dictionary Elements can do.

An even easier means of moving between the transaction set or message and the dictionary is to select **Edit | Goto Dictionary** while on a particular item. You'll immediately jump to the corresponding dictionary. You can also make use of the **Jump Up 1 Level** feature of the Edit and popup menus.

Changing Dictionary Segments

Say that we want N1 segments to be called **Long Name** rather than **Name**:

1. Expand Dictionary Objects.
2. Open the **Segments** folder.

3. Find the **N1** segment.
4. Click in the **Description** field for N1 in the top pane, and change **Name** to **Long Name**.

This change will affect all N1 segments in the guideline, unless you override it in one or more of the segments in the transaction set.

Capabilities of the Dictionary

Element Dictionary

Creating a New Element in the Dictionary

Deleting an Element from the Dictionary

Changing the Properties of an Element in the Dictionary

Working with Codes in the Dictionary

Composite Dictionary

Creating a New Composite

Deleting an Existing Composite

Editing Composite Properties

Adding an Existing Element to a Composite in the Dictionary

Deleting a Subelement from a Composite in the Dictionary

Changing Properties of a Subelement in the Composite Dictionary

Working with Codes in the Composite Dictionary

Segment Dictionary

Creating a New Segment in the Dictionary

Deleting an Existing Segment from the Dictionary

Editing an Existing Segment in the Dictionary

Adding an Existing Composite to a Segment in the Dictionary

Deleting a Composite from a Segment in the Dictionary

Working with Elements in the Dictionary

The element dictionary is a list of every element in the guideline or MIG, regardless of whether it is used anywhere.

Settings in the element dictionary will be passed on to the composite dictionary, the segment dictionary, and to the UDT. They can be overridden in any of these places.

Creating a New Element in the Dictionary

Purpose:

Element creation would most commonly be used by those working on standards committees to create new standards and/or transaction sets or messages. Initially, a new element would not be used anywhere. You must explicitly add it to segments or composites under the Dictionary.

Steps:

1. Open the **Elements** folder under Dictionary Objects.
2. Decide on an unused number for the new element.
3. Choose **Edit | Create new item | Dictionary Element** to bring up the Create Dictionary Element box, which will be empty at first.

ID
Type a number that will identify the element. The ID should be unique within the standard.

EDIFACT IDs are 4 digits; Standards Editor will add leading zeros if you omit them when creating EDIFACT elements. X12 IDs have 1-4 digits with no leading zeros.

Description
Type a short descriptive name for the element. The name must be unique within the standard. It will appear wherever you see lists of elements throughout EDISIM products. New X12 elements with ID as their type should have the word CODE or QUALIFIER in the name.

Purpose
(optional) Indicate the purpose of this element. This provides information conveyed in the element. It should be generic enough to be used in more than one segment. ID type element purposes should begin with the words "Code indicating," "Code specifying," or "Code identifying."

Type
Click on the arrow next to type. Choose the type of data that will be in the element (AN, DT, N, etc.). These are described in detail in **DataTypes.pdf** in EDISIM's Documentation directory.

Min and **Max**
Enter the minimum and maximum number of character positions available for the data in this element. Min and Max will be the same for fixed length, or will be different to represent variable length. R type fields do not count the sign and decimal point as part of the length. Max Length can be between 1 and 32767.

Deleting an Element from the Dictionary

You can delete elements directly from the element dictionary.

You can also remove an element from the segment dictionary as described in Deleting an Element from a Segment in the Dictionary and from a composite as described in Deleting a Subelement from a Composite in the Dictionary.

Purpose:

Standards committees might find it useful to remove an existing element from the element dictionary.

Steps:

1. Determine which segments or composites use the element that you will be deleting

(use the Cross Reference tab in the bottom pane).

2. Open Dictionary Objects and the Elements dictionary.
3. Highlight the element that you want to delete.
4. Choose **Edit | Delete** or press the *Delete* key. Standards Editor asks if you want to delete the element.
5. Use the Cross Reference tab to move to a Segment or Composite that had been using the deleted element. You'll notice it now says that it has been deleted from the dictionary.

Be careful when deleting any item from the Dictionary. The Undo function within Standards Editor will not restore a deleted item.

Changing the Properties of an Element in the Dictionary

Standards committees or those developing guidelines or MIGs might find it useful to change default properties of an element in the element dictionary.

Any changes you make become the new defaults and are inherited by the element everywhere in the guideline or MIG. They can be overridden in the composite and segment dictionary, or in the UDT.

1. Open Dictionary Objects and the Elements dictionary.
2. Highlight the element that you want to edit.
3. Change properties directly in the top pane or within the Detail pane at the bottom of your screen (see User Defined Transactions for instructions on using these fields).

   You can change anything except the ID. (See Creating a New Element in the Dictionary for definitions of the fields).

Working with Codes in the Dictionary

Codes generally originate in the element dictionary and are inherited by the composite dictionary, the segment dictionary, and the transaction set or message. They can be

overwritten at any step.

When an element with codes is selected, the Indicator column carries a **CV**, and the Code Values tab shows all attached codes. You can quickly tell that an element will have codes because its icon is preceded by a plus sign, which you can expand to reveal the Code Line.

Standards committees or those developing guidelines or MIGs might find it useful to add or delete codes from the dictionary in order to set up a customized default code list for a particular element. Here are some considerations to keep in mind:

When used anywhere, use the element dictionary.

When used at a particular location in a particular composite, use the composite dictionary, which overrides codes in the element dictionary.

When used at a particular location in a particular segment, use the segment dictionary, which overrides codes in the element or composite dictionary.

You can override all dictionary code lists locally in the transaction set or message.

You can work with code values wherever you can access elements, including all three dictionaries.

1. Open Dictionary Objects.
2. To change codes in the element dictionary, expand the **Elements** folder.

   To change codes in the composite dictionary, expand the **Composites** folder, and the composite that holds the element.

   To change codes in the segment dictionary, expand the **Segment**s folder and the segment holding the element.
3. Click on the element that you want to change. If it is an X12 standard, it probably will have **ID** in the Type column. Existing codes for that element will appear in the Code Values pane (click the tab at the bottom).
4. Edit the codes as you would in a transaction. (See Working with Values.)

Working on codes in the dictionary is very similar to working on them in a transaction except that you are adding and deleting **dictionary** values. These values propagate to this element throughout the transaction set or message.

Code Sets in the Dictionary

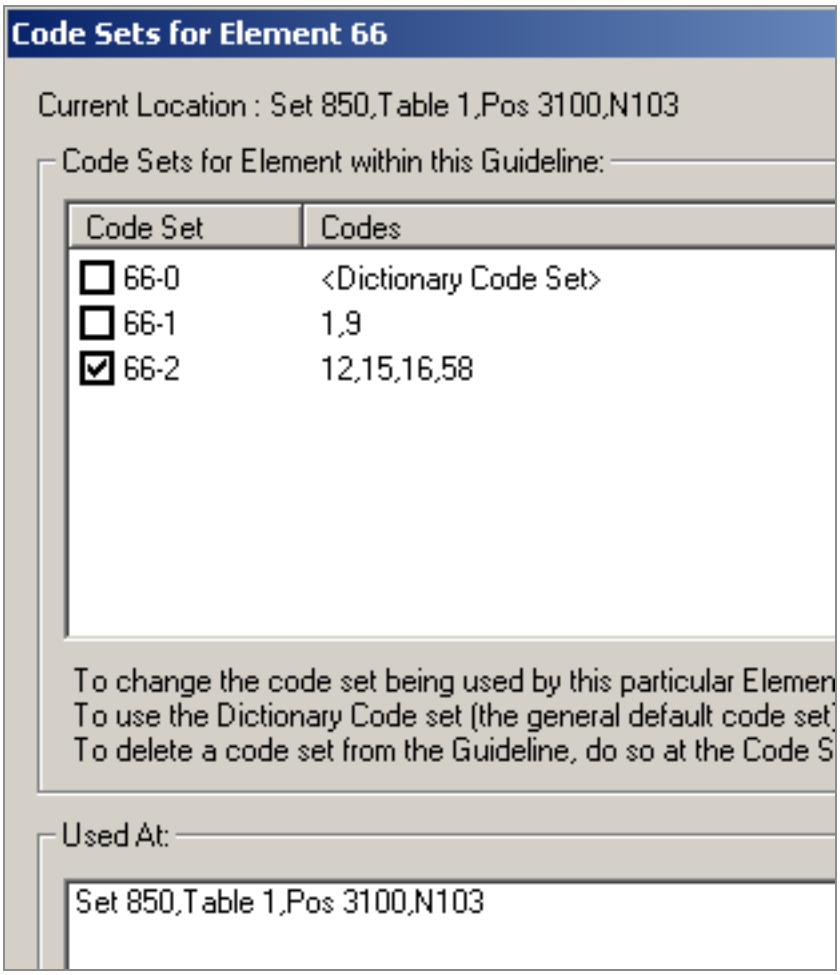
The following table shows which dictionary to use when working with code sets:

	Element	Composite	Segment	Code Set
Attach	X	ü	ü	X
Detach	X	ü	ü	X
Delete	X	X	X	ü
Create	X	ü	ü	ü

Steps:

1. Open Dictionary Objects.
2. You can attach or detach a code set in either the Composite or Segment dictionary.
3. Highlight the element in the composite or segment containing the code set.
4. Choose **Edit | Select Code Sets** or use the popup menu.

The Code Sets box displays where you can click on the set you want to use. See Code Sets.



Seeing where a code set is used: When you click on a code set in the top half of the box, the bottom will show where it is used. This is useful because you need to detach sets before deleting.

Deleting a code set: Please see Deleting Codes.

Changing the Properties of an Existing Code in the Dictionary

Standards committees or those developing guidelines or MIGs might find it useful to change the properties of dictionary codes. These changes would affect that code in that element, wherever it is used, except where overridden.

In each of the dictionaries, you can add code value notes. You have to use the Elements dictionary to change a code's definition and explanation.

1. Click on Dictionary Objects.
2. Expand whichever dictionary you want to work in, and continue expanding until you find the element containing the code.
3. Highlight the element.
4. Select the **Code Values** tab.
5. Right click on the appropriate ID and choose **Level Notes/Properties**.

You can change the Value Definition and Value Explanation from this pane if you have opened it from the Element dictionary; otherwise these fields will be grayed out.

You can add notes as described in Using Notes with Code Values.

If you want to change the ID, you need to delete the code and add a new one in the element dictionary as described in Deleting Codes.

Working with Composites in the Dictionary

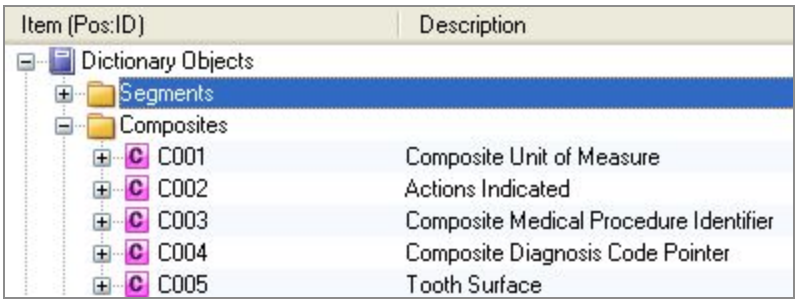
The composite dictionary is a list of every composite in the standard, regardless of whether it is actually used in a segment.

The composites are made up of elements that inherit their characteristics from the element dictionary. You can override these inherited settings in the composite dictionary. Changes made in the composite dictionary will be passed on to the segment dictionary, and, from there, to the UDT. They can be overridden in either of these places.

In the composite dictionary, you can:

* Create composites
* Modify the properties of composites
* Add subelements to composites
* Remove subelements from composites
* Modify the properties of elements in composites
* Customize codes

To use the Composites Dictionary, click on Dictionary Objects, then expand the Composites folder. If there are composites, the screen will look like this:



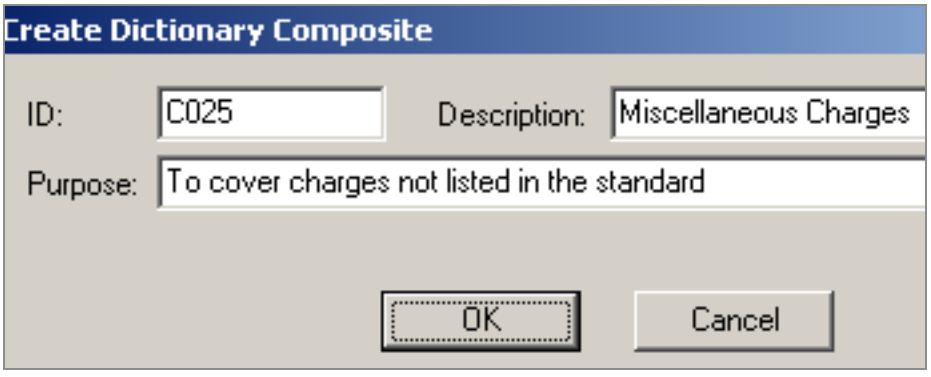
To display a composite's subelements, click on the plus sign next to it or double-click the composite. Subelements with code values will have a plus sign preceding them and CV in their Indicator column.

Creating a New Composite

Standards committees or those developing guidelines or MIGs might find it useful to create composites in the dictionary.

1. Expand **Dictionary Objects** at the top of the top pane.
2. Expand **Composites**.
3. Decide on an ID for your new composite – one that is not being used.
4. Choose **Edit | Create new item | Dictionary Composite**.

You will see an empty Create Dictionary Composite Element box. The following box is partly filled out:



ID

Enter a unique 4-digit reference indicator here. This should start with either C or S and be followed by three digits. An X12 composite starts with C if it is to be used in a data segment, or S if it is to be used in a control segment.

Description

Enter a unique name for the composite (the area will scroll if you type a long name).

Purpose

Type the composite's purpose here (optional).

After filling out the box and clicking OK, you can click on your new composite and continue making modifications from the **Detail** pane.

Adding to the composite

You can now add notes, rules and comments to your new composite. See Editing Composite Properties for details.

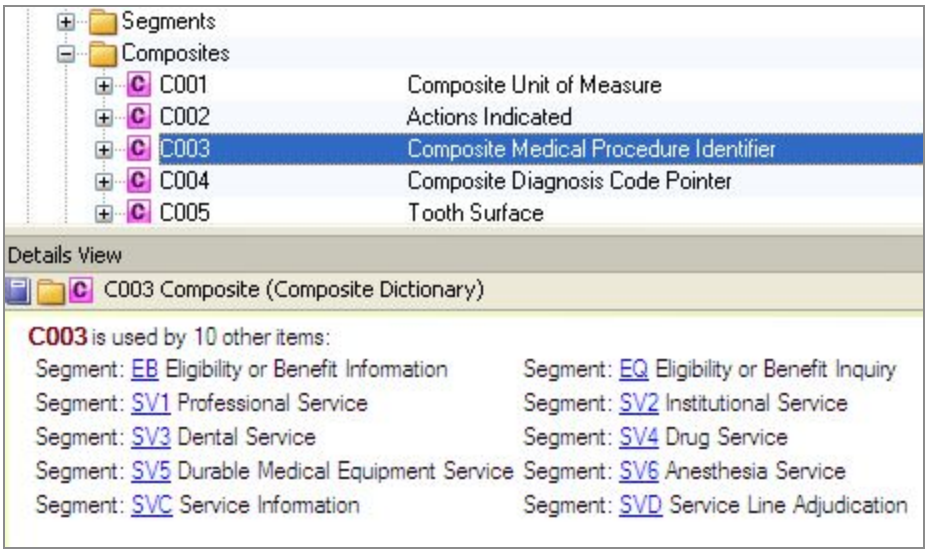
Now, add subelements to the composite and use it in one or more segments:

- For directions on adding subelements to the composite, see Adding an Existing Element to a Composite in the Dictionary.
- For directions on adding the composite to a segment, see Adding an Existing Composite to a Segment in the Dictionary.

Deleting an Existing Composite

Standards committees might find it useful to remove an existing composite from the composite dictionary. To remove a composite from a segment, see Deleting a Composite from a Segment in the Dictionary.

1. Expand Dictionary Objects.
2. Open the Composites dictionary folder.
3. Highlight the composite that you want to delete.
4. Determine which segments use the composite. (Use the Cross Reference tab in the bottom pane.)



In this example composite C003 is being used in 10 other segments. You can jump to these items in the segment dictionary by clicking the links at the bottom.

If you're satisfied that it is okay to delete the composite, use the toolbar's back button to return to the composites dictionary or choose **Edit | Goto Dictionary**.

5. Choose **Edit | Delete** or press the *Delete* key. Standards Editor asks if you're sure you want to delete the composite.

You cannot recover a composite with the **undo** function once it's been deleted. However, you can close your guideline without saving to revert to an earlier version.

Editing Composite Properties

Standards committees or those developing guidelines or MIGs might find it useful to change properties of composites from the Composites Dictionary. These changes will apply everywhere the composite is used, unless they have been overridden in the segment dictionary or in the transaction set or message.

1. Expand Dictionary Objects.
2. Open the **Composites** folder.
3. Highlight the Composite you want to edit but do not expand it.
4. Use the Detail pane to make changes as described below.

Composite Description / Purpose

From the composite dictionary, you can modify the description and purpose of a composite. You can also edit the description directly in the top pane.

1. Expand Dictionary Objects.
2. Open the Composites folder.
3. Highlight the Composite you want to edit but do not expand it.
4. Use the Detail pane to change the description or purpose.

Composite Semantic Note / Comment

From the composite dictionary, you can see and edit semantic notes and comments.

A **semantic note** provides additional information about a subelement in the context of a particular composite. The note may also show the relationship among subelements when certain codes are present. A semantic note is considered part of the standard. Semantic notes can be added at this level or directly on the elements within a composite.

A **comment** provides additional information about a subelement in the context of a particular composite. The comment may also show the relationship among subelements when certain codes are present. A comment is *not* considered part of the standard. Comments can be added at this level or directly on the elements within a composite.

To add a comment or semantic note, click in either of the fields and type in your text.

To add a comment or semantic note:

1. Expand Dictionary Objects and the Composites dictionary.
2. Highlight the Composite you want to edit but do not expand it.
3. Click in either of the fields and type in your text.

Composite Level Notes

From the composite dictionary, you can edit notes.

You can add any level note from within the composite dictionary. They will be inherited by the segment dictionary, and from there by the transaction set or message. You can override them anywhere they are inherited. See Working with Notes.

To add a note:

1. Expand Dictionary Objects and the Composites dictionary.
2. Highlight the Composite you want to edit but do not expand it.
3. Click on the Notes link in the detail pane and add notes as usual.

Composite Syntax Rules/Dependency Notes

Syntax rules (X12) or dependency notes (EDIFACT) are dependencies between subelements in a particular composite, such as “If element A is present, then element B is required.”

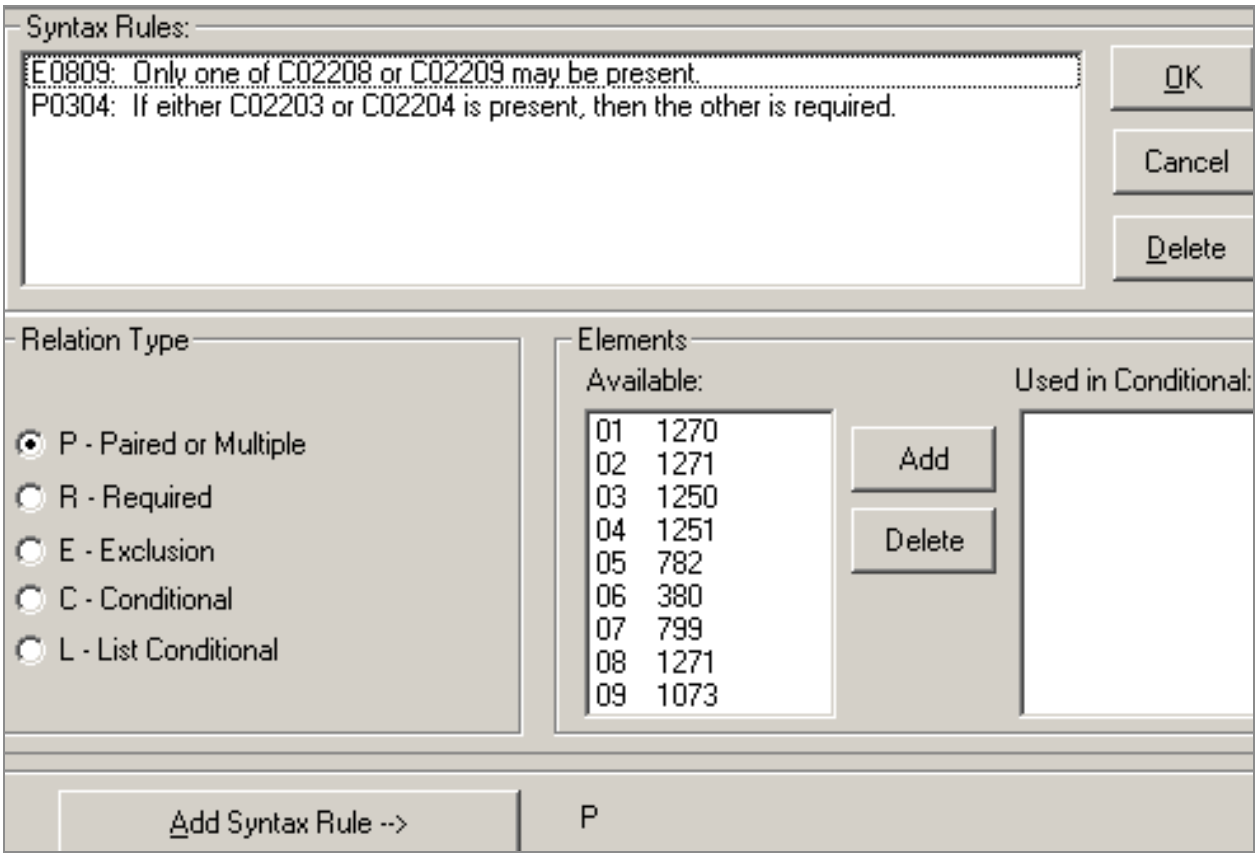
They do not show up in the transaction set or message but they print in Doc Builder, are used in Test Data Generator, and Analyzer and EDISIM Validator check for them. At present, Comparator ignores them.

To see syntax notes, select a composite from the Composite Dictionary and click the **Edit Syntax Notes** button at the bottom of the Detail pane.

To add a syntax rule or dependency note:

1. Expand **Dictionary Objects** and the **Composites** dictionary.
2. Highlight the Composite you want to edit but do not expand it.
3. Click the **Syntax Notes** button at the bottom of the Detail pane of the Composite.

.



The top part of the dialog shows existing Syntax rules/dependency notes. The bottom part lets you add new ones or delete existing ones.

To add a new rule or note:

1. Click on the **Relation Type** (see the chart below .
2. Click the first subelement (**Elements Available**) that is involved with this rule. *Ctrl*+click on the other subelements that are involved with this rule.
3. **Click Add.**
4. They will appear in the **Used in Conditional** box. To remove something from this box, click on it and then choose the **Delete** button (the one right below the Add button, not the one at the top of the box).
5. Click the **Add Syntax Rule** button at the bottom, or press *Alt+A*.

   Check the rule at the top of the box to be sure it is what you intended.
6. Click **OK** to exit the Syntax Notes box.

X12 Syntax Rule Types		
P	Paired or Multiple	If any of the chosen elements are used, then all must be used.
R	Required	At least one of the chosen elements must be present.
E	Exclusion	Not more than one of the chosen elements may be present.
C	Conditional	If the first chosen element is present, then all other chosen elements must be present. However, any elements not specified as the first may appear without requiring that the first element be present.
L	List Conditional	If the first chosen element is present, then at least one of the others must be present. However, if the other chosen elements are present, the first need not be present.
EDIFACT Dependency Note Types		
D1	One and only one	Exactly one of the chosen items must be present.
D2	All or none	The chosen items are all included or all excluded.
D3	One or more	At least one chosen item is included.
D4	One or none	At most, one of the chosen items can be included.
D5	If first, then all	If the first chosen item is present, then all of the others must be present. However, if other chosen items are present, the first need not be present.
D6	If first, then at least one	If the first chosen item is present, then at least one of the others must be present. However, if the other chosen elements are present, the first need not be present.
D7	If first, then none	If the first chosen item is present, then no other chosen items can be included.

To delete a Syntax rule/dependency note, click on it in the top of the dialog, then press *Alt+D* or click the **Delete** button in the *top half* of the dialog (not the one at the bottom). You can select multiple rules to delete by using *Ctrl*+click.

Click **OK** or press *Alt+O* when finished with the box.

You can see Syntax rules/dependency notes in Doc Builder. An excellent way to see if you've violated any syntax rules/dependency notes is to use Test Data Generator to make test data from your guideline or MIG, then have Analyzer or EDISIM Validator check this data against the guideline.

Adding an Existing Element to a Composite in the Dictionary

The element must already exist in the standard. If it doesn't exist, you can create it in the element dictionary (see Creating a New Element in the Dictionary).

To add an element:

1. Expand **Dictionary Objects**.
2. Expand Composites.
3. Display the list of subelements by clicking on the plus button in front of the composite, then highlight where the subelement is to be inserted. It will go *below* the highlight.
4. Choose **Edit | Add item | Element** (or press *Ctrl+3*) to insert a new element row.
5. Click on the element that you want, make changes as needed to the element's details, and click anywhere else on the screen. The element is added.

Deleting a Subelement from a Composite in the Dictionary

1. Expand **Dictionary Objects** if you are not already in the dictionary.
2. Open the **Composites** folder.
3. Display the list of subelements.

4. Click on the subelement that is to be deleted.
5. Press the *Delete* key or choose **Edit | Delete**. Standards Editor asks you to confirm the deletion.

The element remains in the element dictionary.

If you get a message "This element cannot be deleted from the segment because it participates in a syntax relational," see Composite Syntax Rules/Dependency Notes on Syntax rules (X12) or dependency notes (EDIFACT) are dependencies between subelements in a particular composite, such as “If element A is present, then element B is required.” Composite Syntax Rules/Dependency Notes You'll need to remove the element from the rule before deleting it in the composite.

Changing Properties of a Subelement in the Composite Dictionary

By default, subelements in the composite dictionary inherit their properties from the element dictionary. If you override these properties in the composite dictionary, the changes will propagate to that composite throughout the segment dictionary and, from there, to wherever that composite appears in the UDT.

1. Expand Dictionary Objects.
2. Open the Composites folder.
3. Display the list of subelements.
4. Click on the subelement that you want to change.
5. Change the subelement as described in User Defined Transactions.

Working with Codes in the Composite Dictionary

You have two ways to work with codes in the composite dictionary:

1. You can change the list of codes for a particular subelement. Subelements in the composite dictionary will initially inherit codes from the element dictionary. If you change the codes for a subelement in the composite dictionary, this change will be

inherited wherever the composite is used throughout the guideline or MIG: in the segment dictionary and in the transaction set or message.

2. You can attach notes to individual codes in the composite dictionary.

Please see Working with Codes in the Dictionary for "how-to" details.

Working with Segments in the Dictionary

The segment dictionary is a list of all segments in the guideline or MIG, whether or not they are used in a transaction set or message.

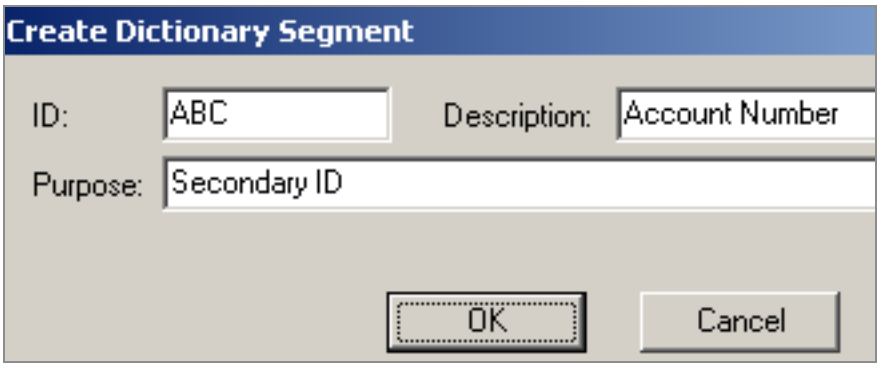
The segments are made up of elements and composites that inherit their characteristics from the element and composite dictionaries. You can override these inherited settings in the segment dictionary. Changes made in the segment dictionary will be passed on to the UDT where they can be overridden.

Please see Capabilities of the Dictionary for a list of what you can do with segments in the dictionary.

Creating a New Segment in the Dictionary

Standards committees may want to create dictionary segments when developing a new transaction or message.

1. Expand **Dictionary Objects** if you are not already in the dictionary.
2. Open the **Segments** folder.
3. Highlight the Segments folder or one of the individual segments.
4. Choose **Edit | Create new item | Dictionary Segment**.
5. In the Create Dictionary Segment box, enter a unique ID (3-character max), Description, and Purpose.



After choosing **OK**, you have a new, empty segment.

For details about semantic notes, comments, and syntax rules/dependency notes, see Editing an Existing Segment in the Dictionary.

To insert elements and composites into the segment, see Adding an Existing Composite to a Segment in the Dictionary and Adding an Existing Element into a Segment in the Dictionary.

To insert the new segment into a transaction set or message, see Inserting a Segment into a Transaction Set or Message.

Deleting an Existing Segment from the Dictionary

You can delete segments from the segment dictionary, a task that Standards committees might find useful.

1. Use the Cross Reference tab at the bottom to determine which transaction sets or messages use the segment that you will be deleting.
2. Expand Dictionary Objects.
3. Open the **Segments** folder.
4. Highlight the segment you want to delete.
5. Choose **Edit | Delete**, press *Alt-x*, or press the *Delete* key. Standards Editor asks if you want to delete the segment.
6. Delete the segment wherever it appears in the transaction set or message.

Editing an Existing Segment in the Dictionary

You may need to make changes to a segment from within the Segment Dictionary.

1. Expand **Dictionary Objects** if you are not already in the dictionary.
2. Open the **Segments** folder.
3. Highlight the segment you want to edit.
4. Make changes as necessary to the Description and Purpose fields in your Detail pane. You can also add or edit Semantic Notes and Comments, as well as Syntax Rules (see Editing Composite Properties for a thorough discussion of these features).

Adding an Existing Composite to a Segment in the Dictionary

This is very much like inserting an existing element into a composite, as described in Adding an Existing Element to a Composite in the Dictionary.

1. Expand Dictionary Objects.
2. Open the **Segments** folder and expand the segment.
3. Click the element above where the composite is to be inserted.

   Insertions go below the selected item. You can click on the segment itself to add a composite before any other item.
4. Choose **Edit | Add item | Composite**.
5. Select the composite from the drop list.

You can edit the properties of this new composite, as discussed in Editing Composite Properties.

Deleting a Composite from a Segment in the Dictionary

This removes a composite from a segment, but leaves it in the composite dictionary.

1. Expand Dictionary Object.
2. Open the **Segments** folder.
3. Expand the segment that includes the composite and highlight the composite.
4. Press the *Delete* key or choose **Edit | Delete**.

Standards Editor asks for confirmation before deleting.

If you get a message "This element cannot be deleted from the segment because it participates in a syntax relational," you'll need to remove the composite from any rules; see Composite Syntax Rules/Dependency Notes.

Changing the Properties of a Composite in the Segment Dictionary

By default, composites in the segment dictionary inherit their properties from the composite dictionary. If you override these properties in the segment dictionary, the changes will propagate to that composite in that segment wherever it is used in the transaction set or message.

1. Expand Dictionary Objects.
2. Open the **Segments** folder.
3. Expand the segment that includes the composite and then highlight the composite.
4. Make changes as described in Editing Composite Properties.

Adding or Deleting Composite Subelements in the Segment Dictionary

This is not possible in the segment dictionary. Instead, create the desired composite in the composite dictionary, then insert it into the segment as described in Adding an Existing Composite to a Segment in the Dictionary.

Adding an Existing Element into a Segment in the Dictionary

1. Open **Dictionary Objects**.
2. Expand the **Segment** dictionary.
3. Expand the segment that is to get the new element, or create a new segment. See Creating a New Segment in the Dictionary.
4. Highlight the element directly above where you want to add a new one.
5. Choose **Edit | Add item | Element**.
6. A new element row is added, with position numbers automatically updated. Choose from the drop list of elements.

You can edit the element as described in Editing Composite Properties.

Deleting an Element from a Segment in the Dictionary

This removes an element from a segment, but leaves it in the element dictionary.

1. Open **Dictionary Objects** if you are not already in the dictionary.
2. Expand the Segment dictionary.
3. Expand the segment that has the element.
4. Click on the element that is to be deleted and press the *Delete* key or choose **Edit | Delete**. A confirmation box appears before the element is actually deleted.

If you get a message saying that you cannot delete the element because it participates in a syntax relational, you must delete or change the relational that refers to it (see Composite Syntax Rules/Dependency Notes).

Changing the Properties of an Element or Subelement in the Segment Dictionary

By default, **elements** in the segment dictionary inherit their properties from the element dictionary.

By default, **subelements** in composites in the segment dictionary inherit their properties from the composite dictionary, which inherited properties from the element dictionary.

If you override these properties in the segment dictionary, these changes will propagate to that segment throughout the transaction set or message. They can be overridden there.

Steps:

1. Open Dictionary Objects.
2. Expand the Segment dictionary.
3. Expand the segment.
4. Highlight the element and edit its fields as described in Editing Composite Properties.

Working with Code Sets in the Segment Dictionary

Elements in the segment dictionary will initially inherit codes from the element dictionary. Subelements in composites in the segment dictionary will inherit codes from the composite dictionary, or, if they were not changed there, from the element dictionary.

If you change the codes for an element or subelement in the segment dictionary, this change will be inherited wherever the segment is used throughout the transaction set or message.

Please see Working with Codes in the Dictionary for "how-to" details.

Business Rules

Business Rules Overview

Creating a business rule is an advanced skill for those familiar with Standards Editor

Business Rules are special conditions that you create for elements and segments, beyond what is required by standards publishing organizations. Their purpose is to provide additional checking for all TIBCO Foresight validation products.

A business rule is attached to an element, composite, or segment. It specifies that if one or more conditions are met, you can:

- Use a code list for the current location
- Use an application value list
- Set the usage or status
- Execute an external routine.

TIBCO Foresight's extensive library of external routines lets you make highly customized business rules. For details, please see **TIB_fsp_edisim_n.n.n_BusinessRules.pdf** in EDISIM's **Documentation** directory.

This section:

- provides a tutorial, which leads you through the steps of creating a business rule.
- details the components of the dialogs associated with rule creation.
- explains the use of variables, how to manipulate existing rules, and other tasks relating to business rules.

Introductory Business Rule Tutorial

The rule that we want to create is, paraphrased:

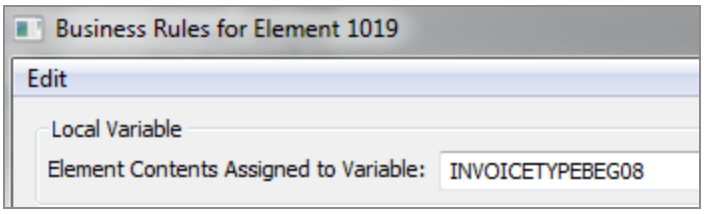
If the BEG-08 contains code value IBM,
then we must use the N1 loop at position 3100 in Table 1

Setting up a Variable

If the EDI data contains IBM at BEG-08, then we need an N1 loop later in our standard. We must give the BEG-08 a unique name (called a variable within EDISIM) so that we can refer to it in the business rule:

1. Create a new X12-5040 850.
2. Highlight element **1019** at BEG-08.
3. Right-click on BEG-08 and choose **Business Rules ...**.

Under the Local Variable area of the dialog, type **INVOICETYPEBEG08** in the text box. (It will appear in uppercase text.)



4. Click **OK**.

The BEG-08 now has a variable assigned. This is noted with a **BV** (for Business Variable) in its Indicator column.

You can verify this by accessing the business rules box again.

Setting up a Rule that uses the Variable

With the position of the BEG-08 identified, we can now set up a Business Rule stating that the N1 loop is required when **INVOICETYPEBEG08** contains **IBM**.

1. Highlight the **N1** segment at position **3100**, open the business rules box, and click

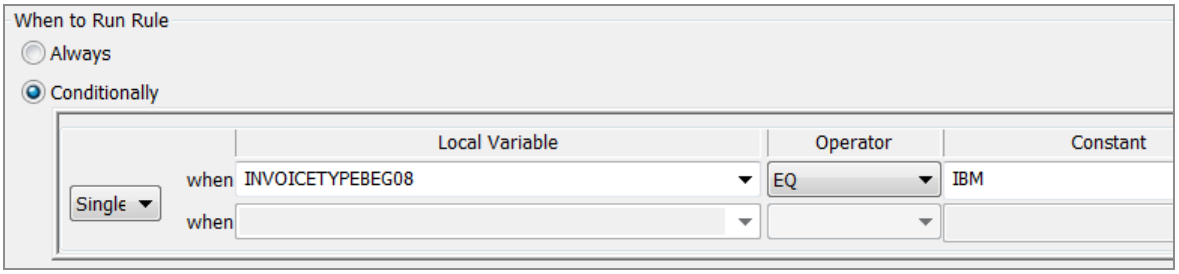
New.... The Condition and Rule Definition dialog appears.

2. Under the When to Run Rule area of the dialog click the **Conditionally** radio button. This indicates that the rule applies only when a certain condition occurs.
3. Choose **Single** from the drop list, since this is a single "if" condition with no "And" or "Or" conditions.
4. You will see a row of three fields across the top. The first is for a variable name. Choose **INVOICETYPEBEG08**.

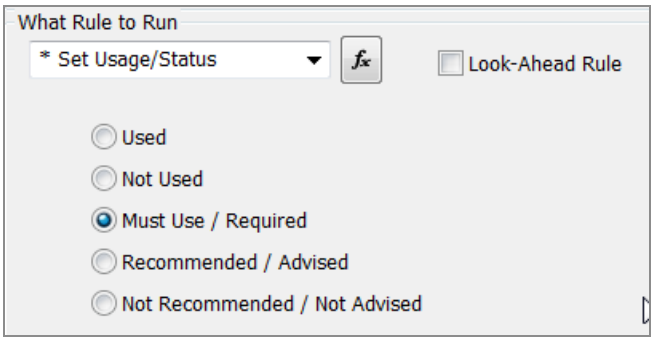
   The second is for an operator. Choose **EQ** for "equals."

   The third is for a constant. Click on it and type the code value **IBM**. Use capital letters since this field is case-sensitive.

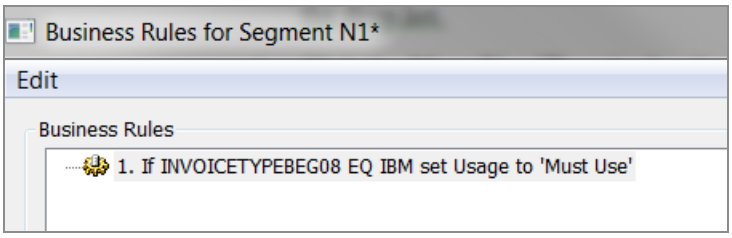
   We now have the "if" part of the business rule: *If the BEG-08 contains code value IBM.* The variable name **INVOICETYPEBEG08** identifies the BEG-08.



5. We need to specify what is to happen if the BEG-08 contains IBM. Under the What Rule to Run area of the dialog select ***Set Usage/Status** from the drop list.
6. Click the **Must Use/Required** radio button.



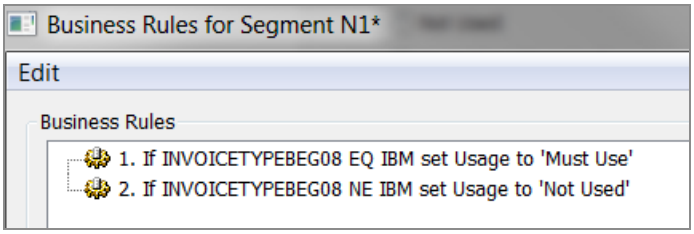
7. Click **OK**. You now see the completed rule.



You can continue adding other rules, if you'd like. For example, let's say that we want the N1 to be marked as Not Used if the BEG-08 contains anything other than IBM.

To do this, choose the following options **New | Single | InvoiceTypeBEG08 | NE | IBM | Set Usage/Status | Not Used | OK.**

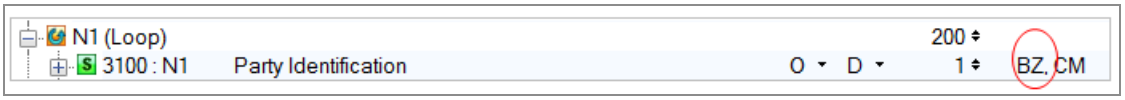
You now have two business rules.



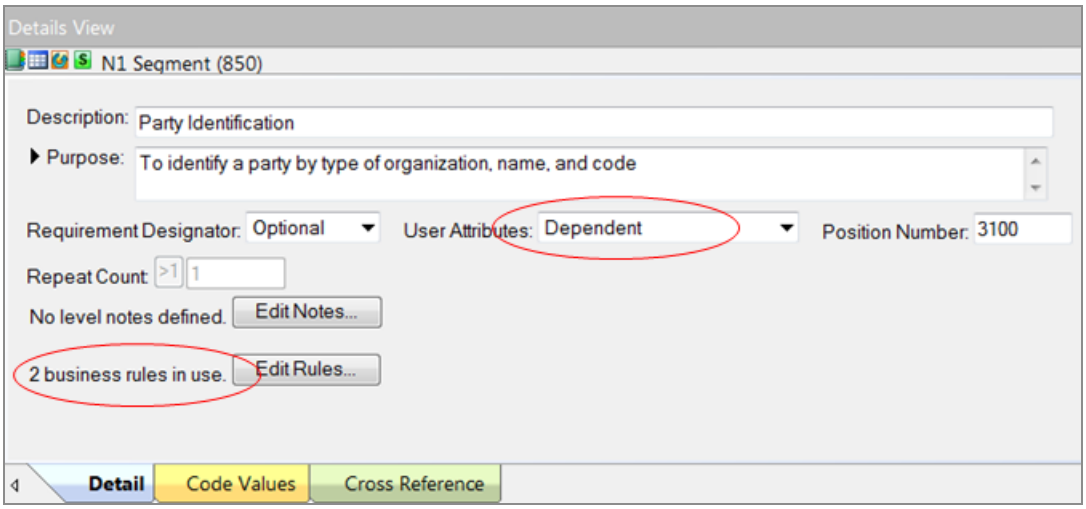
If you require the N3 and N4 for mailing address information, you would need to repeat these rules on those segments too.

Rule Indicators

When you have completed your rule or rules and close the business rules box, you will see **BZ** in the Indicator column.



Additionally, the message **2 business rules in use** appears in the Detail pane and Standards Editor has changed the segment to Dependent.



Seeing the Rules in Action

Analyzer or EDISIM Validator will now apply these rules to the N1 segment when you check data using this guideline or MIG.

To test out your new rules, save your new guideline and use it with Analyzer to validate ruletest.txt in EDISIM's Samples directory.

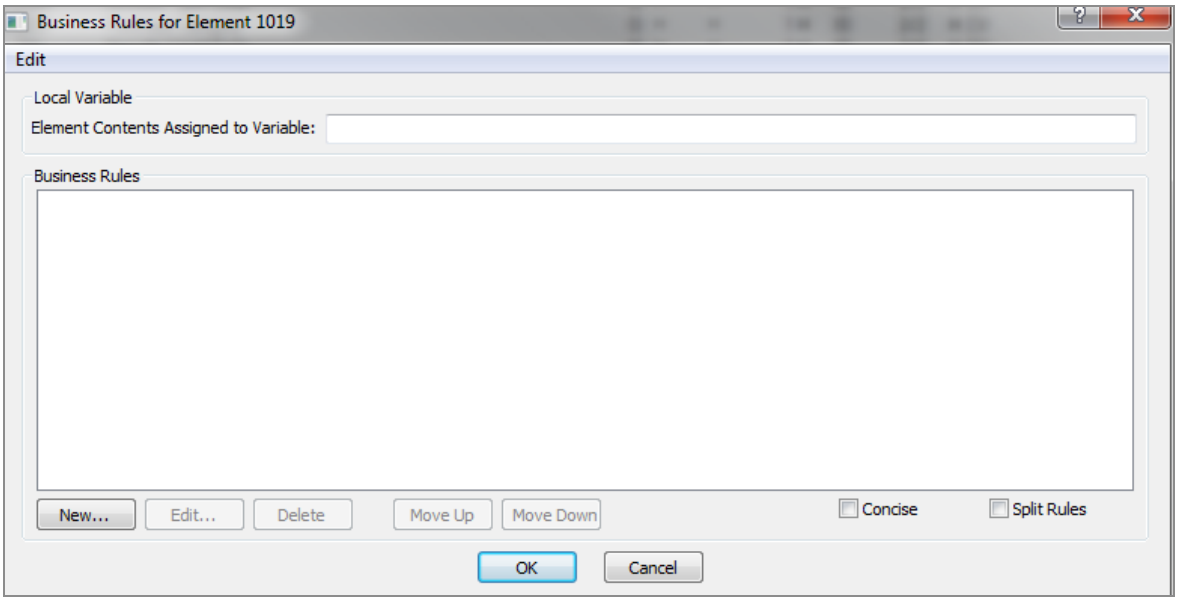
This file contains two transaction sets, both containing the N1 loop. The first set has BEG-08 equal to IBM and it does not give an error message on the N1 loop. The second set has BEG-08 equal to IEL and the N1 does give the message.

Business Rules dialog

The Business Rules dialog allows you to define a variable, view, move, and edit existing rules, and select presentation preferences.

To open the Business Rules dialog, click on the segment, composite, or element where you want to create a business rule and use any of these:

- Choose **Edit | Advanced | Business Rules ...**.
- Right-click on the item and choose **Business Rules ...**.
- On the Detail tab at the bottom, click **Edit Rules ...**.
- The Business Rules box appears:



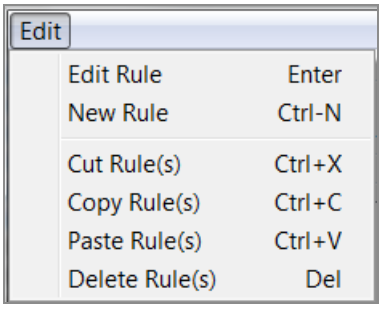
Note that the Local Variable area only appears when you have opened the Business Rules dialog from an element; it will not appear when it is opened from a segment.

Dialog components

The Business Rules dialog has the following components.

Edit shortcuts

The Edit Shortcuts drop box allows alternate access to common tasks and provides a list of keyboard shortcuts.



Local Variable area

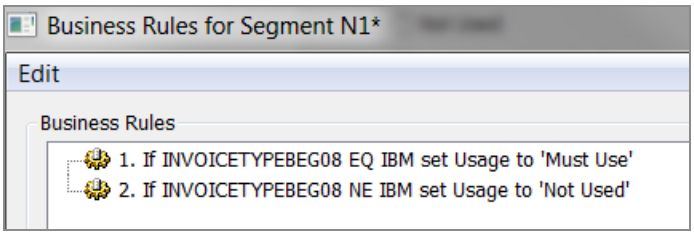
The Local Variable Area is used specify a variable name that is assigned to the selected element contents.

This area only appears when you have opened the Business Rules box from an element.

For detailed information on creating variables, see Variables.

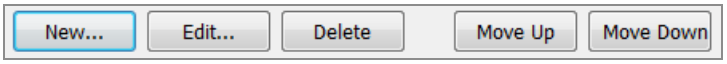
Rule Display area

This area displays any currently defined rules for the segment or element.



Rule manipulation buttons

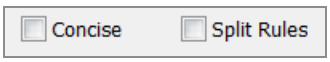
The rule manipulations buttons allow you to work with existing rules or specify new ones.



For detailed information, see Manipulating Existing Business Rules.

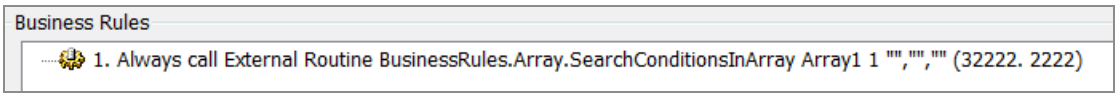
Rule text display options

Business Rules text can be displayed in various formats. Select one or both of these checkboxes to specify a different presentation of the rule(s).

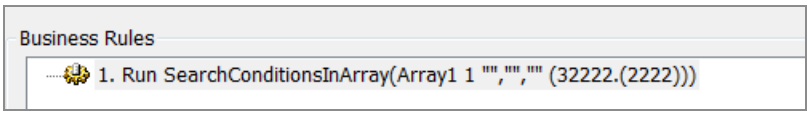


Concise Rule Text Checkbox

Concise Rule Text not selected:

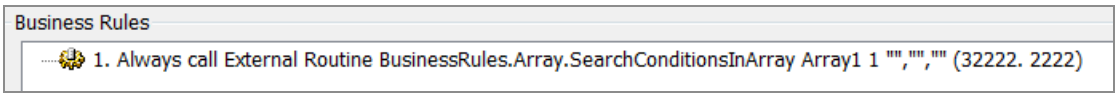


Concise Rule Text selected:

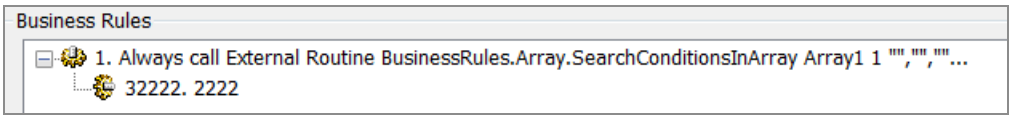


Split Rules Checkbox

Split Rules not selected:



Split Rules selected:



Dialog Dismissal Controls

Clicking the **OK** button completes the action and clicking the **Cancel** button dismisses the dialog without changes.

Condition and Rule Definition dialog

The Condition and Rule Definition dialog allows you to specify a rule, the circumstances under which it should be run, and to define error message overrides.

The setup for business rules occurs in the Condition and Rule Definition dialog. To open this box:

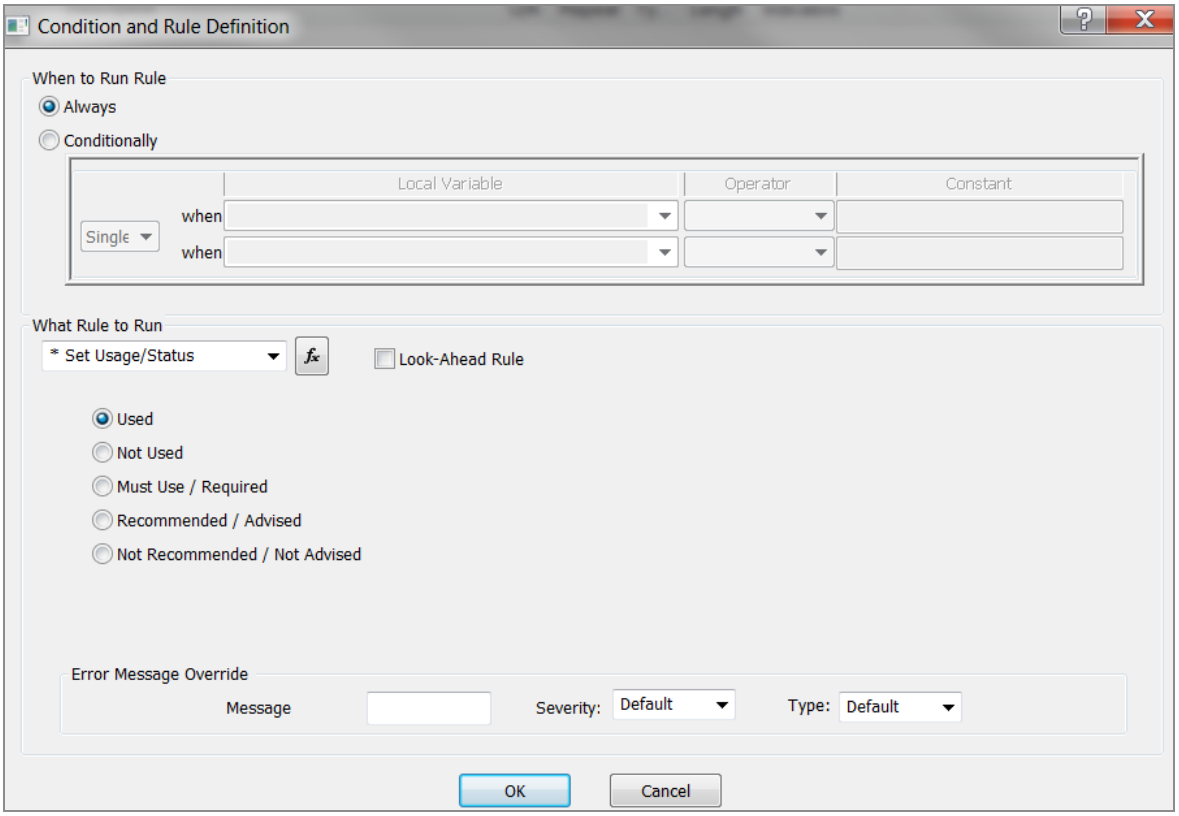
1. Highlight the item that depends on the variable.

For example, if we're trying to capture a condition that can be paraphrased as:

If the BEG-08 contains IBM or IEL,
Then there must be an N1 here

…we would highlight the N1 segment.

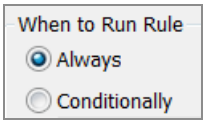
2. Open the business rules box and click **New** to open the Condition and Rule Definition dialog.



When to Run Rule Area

In general, this area defines the “when” and "if" parts of the business rule.

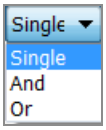
When to Run Rule Selector



This area indicates when the rule should be run:

Always	Always run the rule, without any “if” condition(s) attached. The input fields are inactive if you select Always.
Conditionally	If a certain condition or conditions occur, run the rule. Use the input fields to specify those conditions.

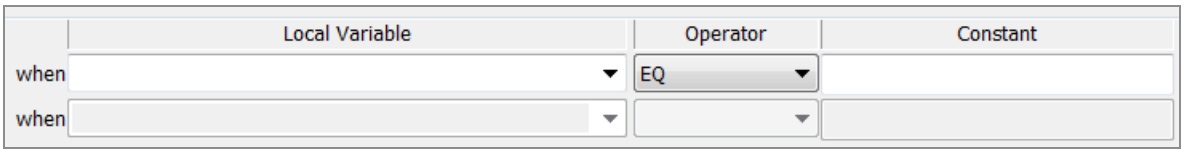
Condition(s)



This area plus the input fields let you create the "if" part of the condition:

Single	One condition triggers the rule to run. This is a simple If-then condition. When you select Single, one row of input fields activates.
And	Two conditions must be true before the rule is triggered. When you select And, both rows of input fields are active.
Or	If either of two conditions is true, the rule is triggered. When you select Or, both rows of input fields are active.

Variable, Operator, and Constant



These fields become active if you select the option to run the rule **conditionally**. If you select Single, the top row becomes active. If you select **And** or **Or**, the second row also becomes active.

The first input field in each row is for a variable that you have assigned to an element earlier in the guideline or MIG.

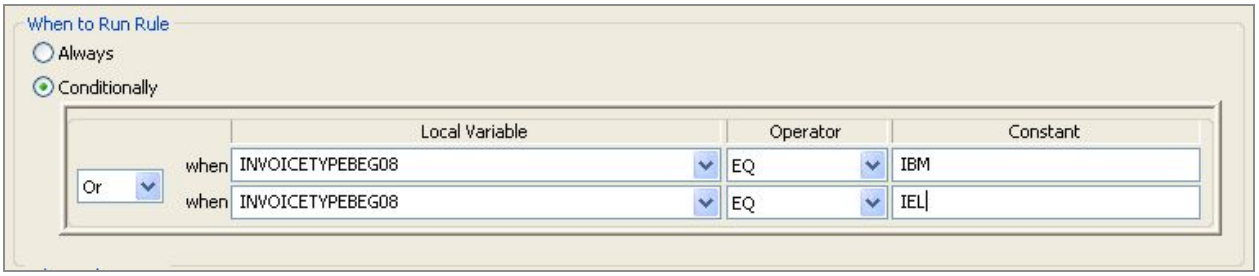
The second input field in each row will contain an operator from the drop-list:

EQ	Equals
NE	Does Not Equal
GT	Greater Than
GE	Greater Than or Equal to
LT	Less Than
LE	Less Than or Equal to
EXISTS	EDI file contains this item
DOESN'T EXIST	EDI file does not contain this item

If the operator requires a value, type it in the third column. This field is case sensitive. **EXISTS** and **DOESN'T EXIST** do not require values in this column.

If the rule is:
If the BEG-08 contains IBM or IEL, then there must be an N1 here

Then the top fields will reflect the "if" part of the rule like this:



This "if" testing is comparing the values alphabetically. It isn't doing a numeric compare. Therefore, 100 will be considered less than 99 because 1 is less than 9. For numeric comparisons, use an external business rule like CompareNumeric. These are described in **TIB_fsp_edisim_n.n.n_BusinessRules.pdf**.

For detailed information on variables, see Variables.

What Rule to Run area

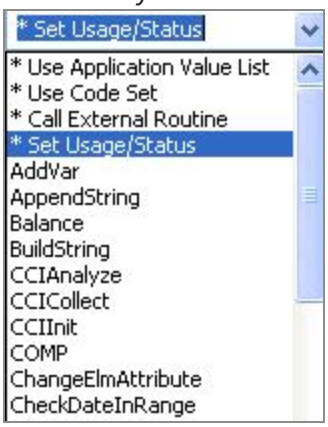
In general, this area defines the "then" part of the business rule.

Select Rule Drop Box

This is always available.

Rule types

Commonly used rules



The items marked with an asterisk are rule types. Use these selections to

- Use Application Value List
- Use Code Set
- Call External Routine
- Set Usage/Status.

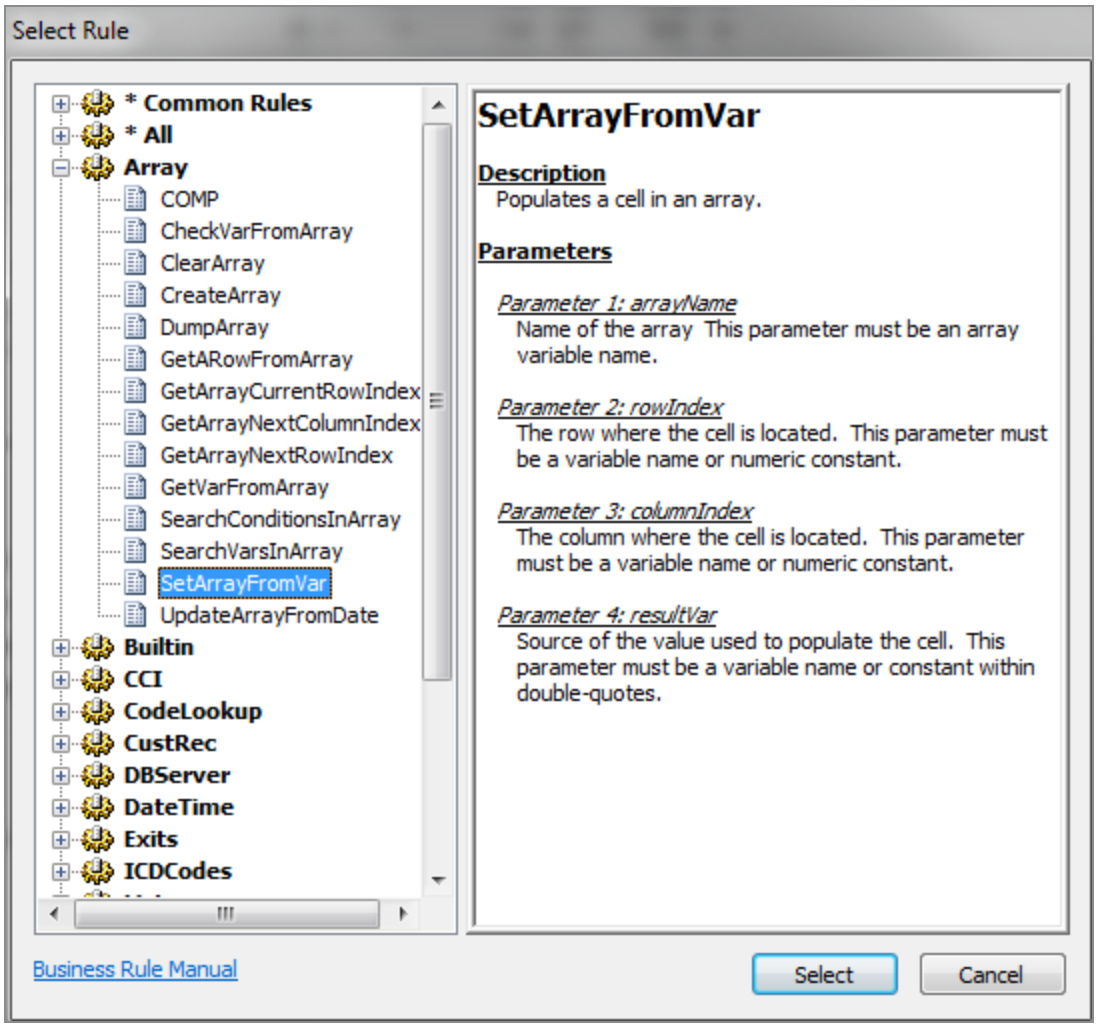
The remainder of the list items are commonly used rules. Selecting one of these causes the structure of the rule to be transferred to the input area.

Rule Selector and reference

Business rules can also be defined using the Select Rule dialog. This dialog functions as both a reference tool, providing a complete listing of rules and their required parameters, and as a tool to select a business rule and be stepped through the parameters needed to make the rule run.

1. Click the Select Rule dialog icon in the What Rule to Run area:

2. Highlight a rule from the rule list in the left pane of the dialog. A description of the rule and its parameters populates in the right pane:

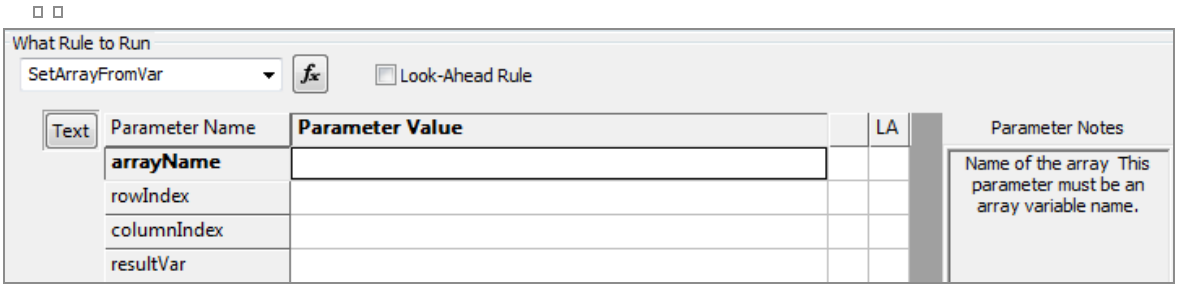


3. If this is a Look-Ahead Rule, select the checkbox in the What Rule to Run area.

   "Look-Ahead" is an advanced Business Rules concept that allows you to pre-scan a defined section of the data, execute only Lookahead business rules, and then return

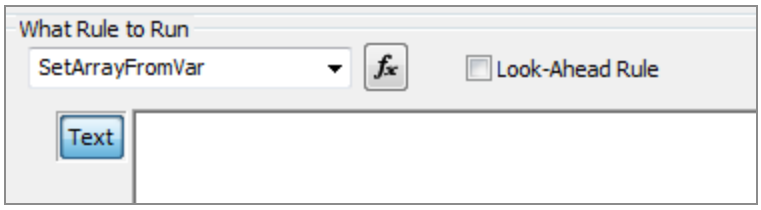
to the beginning of the range to start validation. See **BusinessRules.pdf** for more information.

4. To select a rule from the rule list for use in the Condition and Result Definition dialog, click Select. The structure of the rule is transferred to the input area and you are prompted to enter the parameters the rule requires to run. Parameter notes are provided for reference, as shown in this example.



The LA (Look-Ahead) column will have a checkbox in it when the parameter corresponds to a sub-rule.

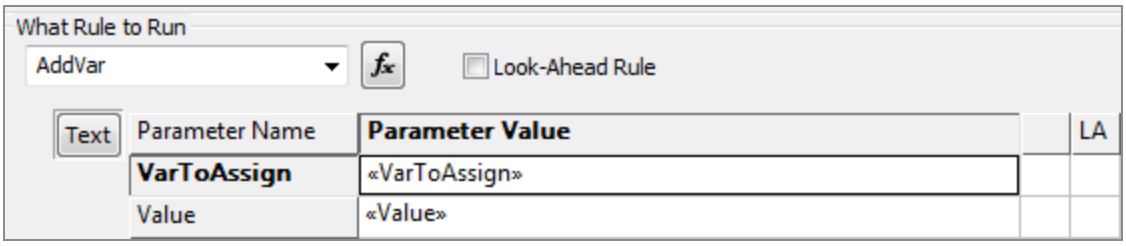
5. If you prefer, click the Text button to access a text box in which to manually enter your rule.



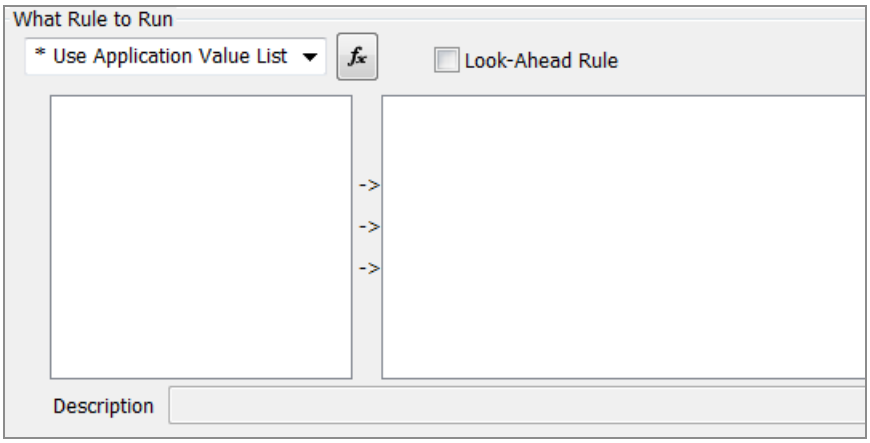
For details, please see **BusinessRules.pdf** in EDISIM's **Documentation** directory.

Input Area

The appearance of the input area changes depending on the task being performed. For example, the area appears as follows when AddVar is selected from the Select Rule drop box.



However, it will look different if *Use Application Value List rule type is selected.



Error Message Override area

Instream and Desktop users can create their own custom error messages. Error Message Override is one way to display a custom message if the current rule is violated.

For details, please see Appendix B of **BusinessRules.pdf**, in EDISIM's Documentation directory.

Analyzer ignores this setting but EDISIM Validator and other TIBCO Foresight validators use it.

Dialog Dismissal Controls

Clicking the OK button saves the rule, dismisses the dialog, and returns you to the Business Rules dialog, where the new rule is displayed.

Clicking the **Cancel** button dismisses the dialog without saving the rule and returns you to the Business Rules dialog.

Variables

A variable identifies an element that can then be used in a business rule. A variable must be earlier in the guideline or MIG than the business rule that uses it. Validators operate "top-down" and cannot backtrack to locate a variable.

Example condition that we want to capture in a business rule:

If the BEG-08 contains IBM or IEL, there must be an N1 here.

This requires that:

- We assign a variable name to the BEG-08
- It must be before the N1.

Assigning Variables

To assign a variable:

1. Highlight the element to which the variable will point. In our example, this is the BEG-08.
2. Open the business rules dialog.
3. Under the Local Variable area of the dialog, type a descriptive name for the variable in the text box.

   The name can be any length and cannot contain spaces or other special characters. It will appear in uppercase text. Consider including the location as part of the name, so that you can later find where it is attached. Example: **INVOICETYPEBEG08**. Do not assign the same variable name to multiple locations in the same guideline.

   To change an existing variable name, just overwrite it with a new one. (Be sure that it isn't being used in a business rule before overwriting it.)
4. Click **OK** to exit the business rules box.

Business rules can now use this variable to refer to this element. You cannot have multiple variables on one element.

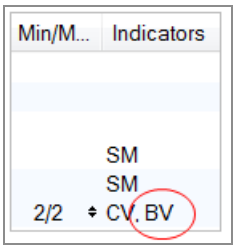
Locating Variables

There is no central list of all variables, but smart naming practices will make them easier to locate.

Best practice Include the variable's location as part of its name. For example, if you attach a variable to the third element in the Y6 segment:

Good name for variable	**`AuthDateY603`**
Bad name for variable:	`Date`
Very bad name for variable:	`X`

When an element has a variable assigned, it will show BV in its Indicator column in the top pane:



Deleting or Renaming Variables

1. Click on the element where the variable is attached (in our example this was the BEG-08 and it has **BV** in the Indicator column).
2. Open the business rules dialog.

To delete it, clear the text in the text box.

To change it, retype the text in the text box.

3. Modify business rules that use the changed or deleted variable.

Rule Types

When defining the “then” part of the business rule, you may select a result (or rule) type. The items in the Select Rule drop box marked with an asterisk are result types. The behavior of the input area depends on the selection made here.

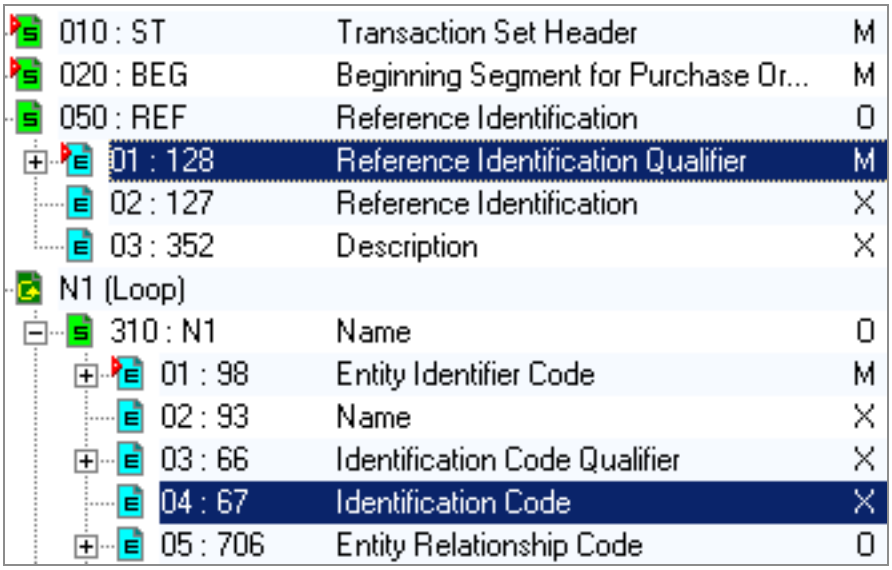
Use Application Value List

This will be available if you are highlighting an element, and if at least one application value list exists in the guideline or MIG. The list does not have to be attached anywhere.

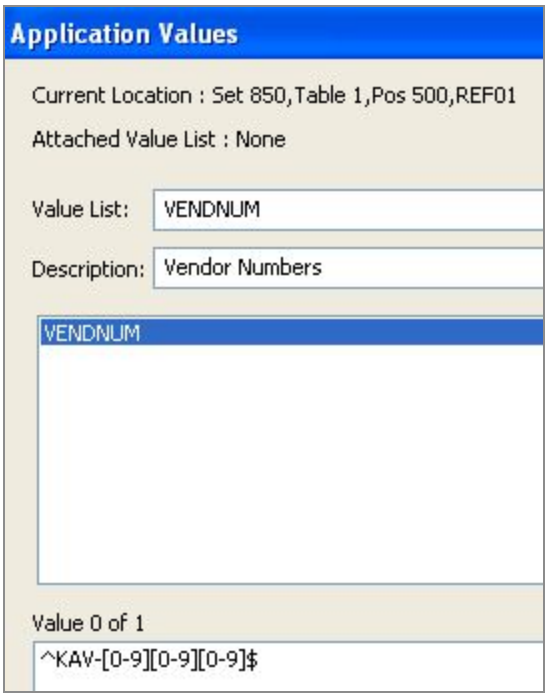
This choice lets you use a particular application value list if certain conditions are met earlier in the guideline or MIG. It is available if you are highlighting an element, and if you have defined application values for any element.

For example, we might want to have Analyzer check for a condition in an 850 Purchase Order that can be paraphrased as:

If the REF-01 is VR,
Then the N1-04 must be from application value list VENDNUM.



Before starting, create VENDNUM but don’t attach it to the N1-04. In this example, VENDNUM contains a pattern that says the value must start with KAV followed by a dash and three digits:



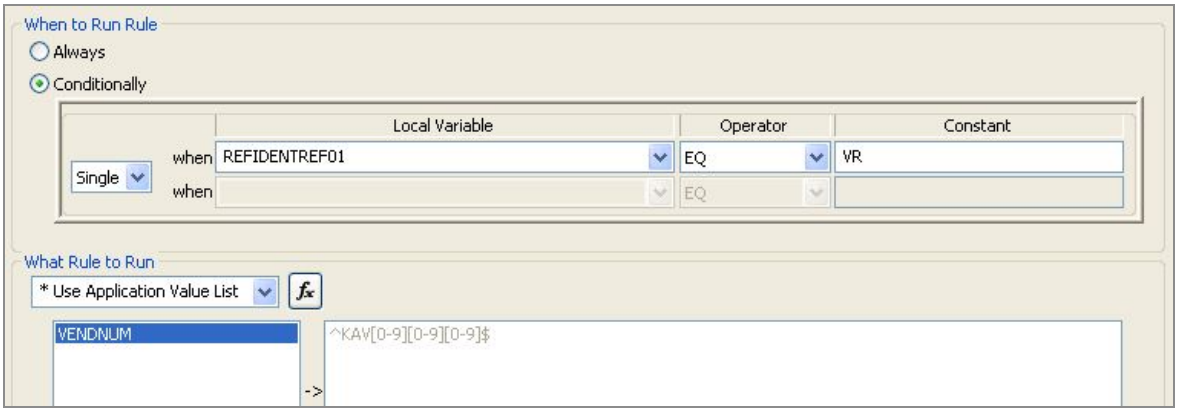
To set up a business rule that uses VENDNUM, first set up a variable pointing to the REF-01:

1. Highlight the **REF-01**.
2. Open the business rules box, create the variable **REFIDENTREF01**, and click **OK** .

   Then set up the business rule on the N1-04:
3. Switch to N1-04, create a new business, and choose **Single**.

   In the Variable, Condition, Value area, choose **REFIDENTREF01** and **EQ** and type **VR**.
4. Select ***Use Application Value List** from the drop box. Click **OK**.

   All application value lists appear. Select the one list that you'd like to use if the REF-01 equals VR: VENDNUM.



5. Click **OK** | **OK**.

   The N1-04 element will display **BZ** in its Indicator column, signifying the presence of a business rule.

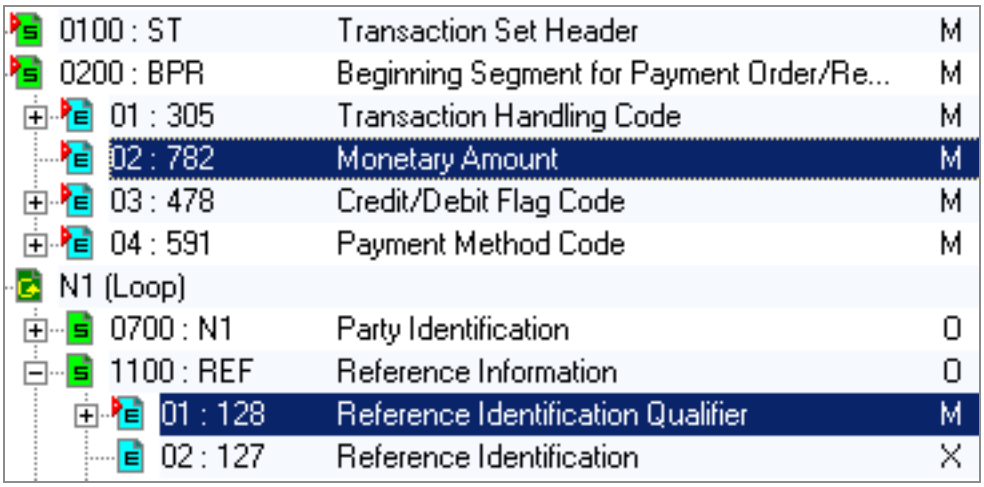
Use Code Set

This will be available if you are highlighting an element, and if customized code lists have been created for this element anywhere in the guideline or MIG.

This business rule choice lets you use a particular code set if certain conditions are met earlier in the guideline or MIG. The choice is available if you are highlighting an element that has code sets.

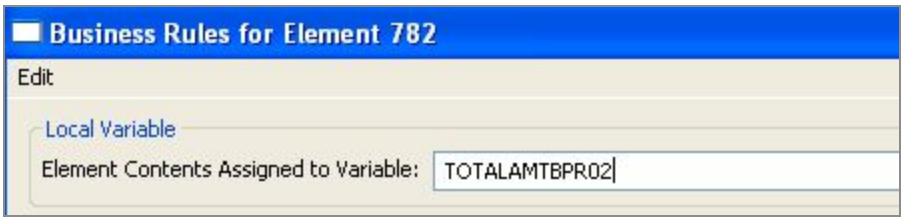
For example, we might want to have Analyzer check for a condition in an 820

If the BPR-02 is greater than 1000,
then the REF-01 must be VE or VR.



To set this business rule up, we first set up a variable pointing to the BPR-02:

1. Highlight the **BPR-02**.
2. Open the business rules box and add a variable called **TOTALAMTBPR02** and press **OK**.



We need a code list containing VE and VR for the REF-01. This list is to be used only under certain conditions.

1. Highlight the **REF-01** and choose the **Code Values** tab. Mark all values as unused. If all codes disappear, click the  button on the bottom pane's toolbar. Locate **VE** and **VR** and mark them as used.

The two codes show in the Values pane, indicating that they're the ones to be used. Not true. We need to detach this list from this location.

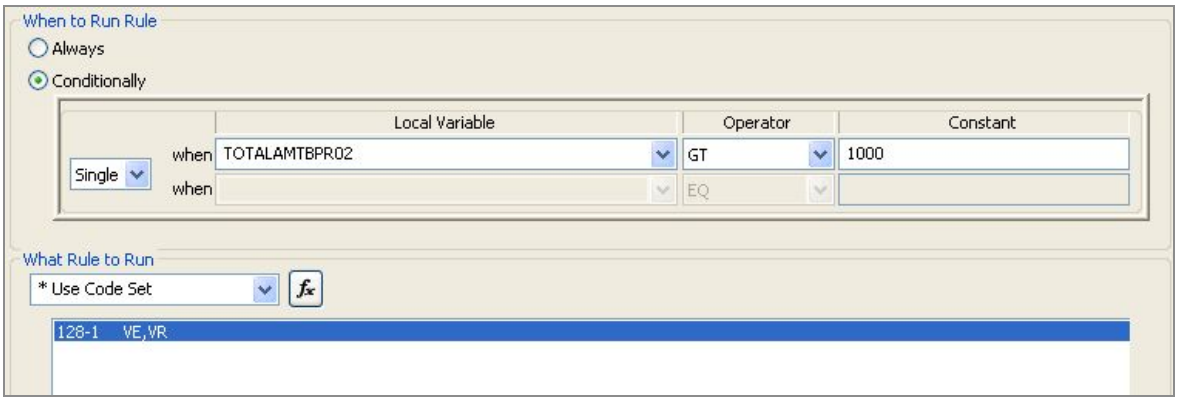
2. Right-click on the REF-01 element in the top pane, and choose **Select Code Set**. Select the **<Dictionary Code Set>** (0) set and click **OK**.

All codes now appear in the Values pane. Although the VE,VR code set is not used anywhere, it lives on!

We need to let Standards Editor know when to use our VE,VR code set.

1. Click on the **REF-01**.
2. Open the business rules box and click **New | Single**.
3. Click the arrow in the first input field to drop down the list of variables and choose **TOTALAMTBPR02**.
4. Click the arrow in the second input field to drop down the list of operators and choose **GT**.
5. In the third input field, type **1000**.
6. Select ***Use Code Set** from the drop box.

   Select the code list that you'd like to use if the BPR-02 is greater than 1000: **VE,VR**.



7. Click **OK**.

   Look at the rule, then press **OK**.

   All codes remain in the Values pane. **BZ** displays in the Indicator column of the top pane, signifying the presence of a business rule.

When using this guideline, Analyzer will check the value in the BPR-02. If it exceeds 1000, Analyzer will check to see that the REF-01 contains either VE or VR.

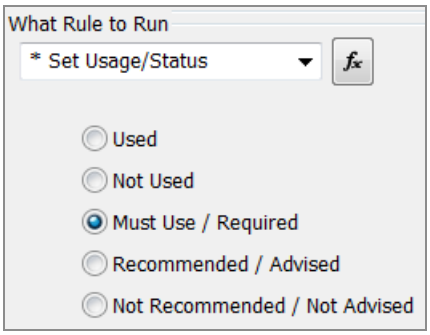
Call External Routine

This is always available.

If a business rule Relationship condition is satisfied, then Standards Editor runs a COM-enabled server such as a Java, Visual Basic, or C++ program. This lets you extend the capabilities of your business rules.

EDISIM has a large set of external routines that can be used with Analyzer, EDISIM Validator, and the Instream and Transaction Insight products. They are documented in **BusinessRules.pdf** in EDISIM's Documentation directory.

Set Usage/Status



This lets you set the usage or status of a segment, composite, or element if certain conditions are met earlier in the guideline or MIG. The determining condition is the content or existence of a certain element that has a variable assigned to it.

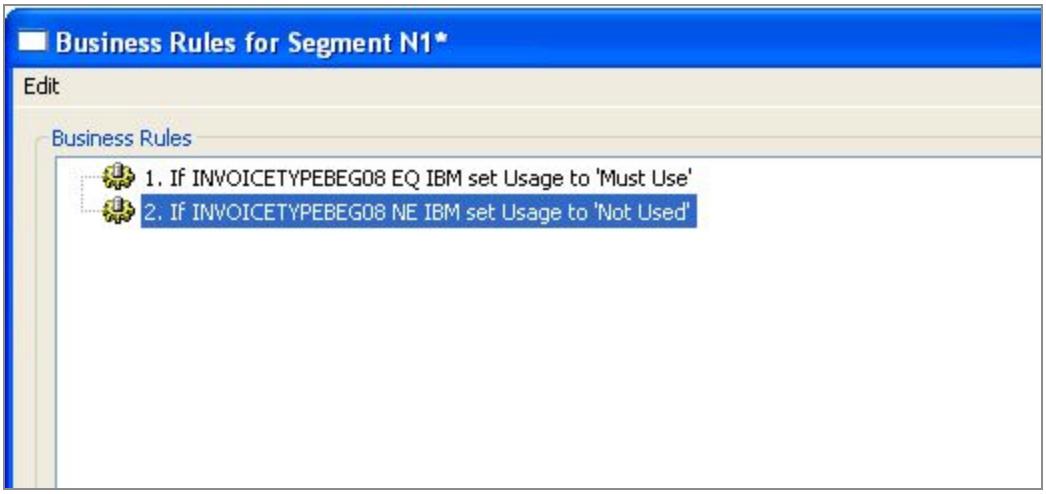
When you place a business rule on an item, Standards Editor shows its usage as dependent. During analysis, each repetition of the item will have its usage reassigned, depending on whether the condition was fulfilled.

For an example, please see Introductory Business Rule Tutorial.

Manipulating Existing Business Rules

To manipulate existing business rules:

1. Highlight the segment, composite, or element that has the rule(s).
2. Open the business rules box, which will list all existing rules for the current item.



Editing a Business Rule

1. Highlight the rule that you would like to change.
2. Click **Edit**.
3. Make your changes in the Condition and Rule Definition box.
4. Click **OK**.

Deleting a Business Rule

Highlight the rule that you would like to delete, then click **Delete**.

Rearranging the List of Business Rules

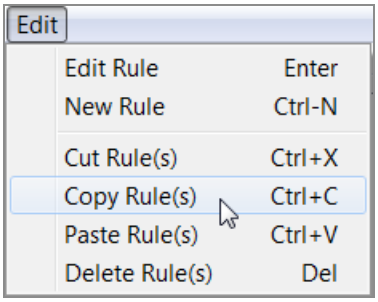
The rules execute from the top down. Sometimes the order in which they execute is significant.

To rearrange your rules, highlight a rule that you would like to move up or down in the list, then use the **Move Up** or **Move Down** buttons.

Copying Business Rules

To copy a business rule:

1. Select the business rule in the main business rules box.
2. Use *Ctrl*-**c** or the Edit menu:



3. Go to the target business rules box and use *Ctrl*-**v** or the Edit menu to paste.

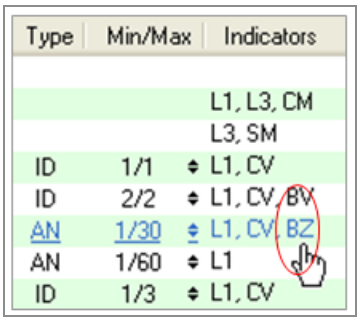
Locating and Printing Business Rules

You can find business rules by:

- Looking for **BV** or **BZ** in its indicator column

- Creating a business rules report

Indicator Column



Look in the Indicator column for:

BV A business rule local variable is attached to this item

BZ A business rule is attached to this item

Business Rules Report

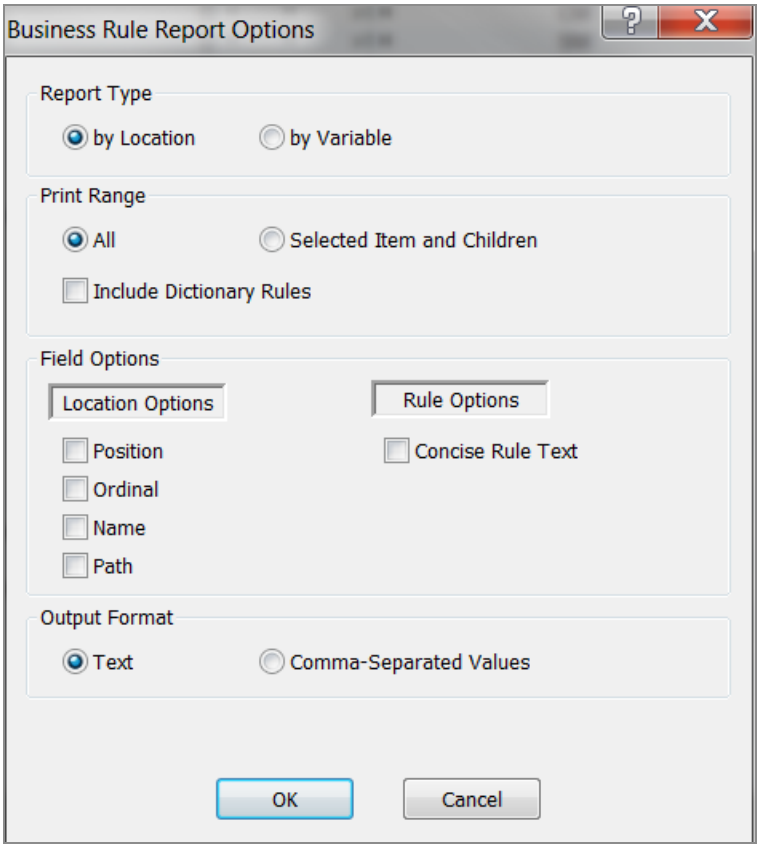
To generate a list of business rules:

1. If you only want to print rules in a certain range, click the top of the hierarchy for that range.

If you want all rules in the guideline, it doesn't matter where you click in the top pane.

2. Choose **File | Print | Print Rules**.
3. Select options as described below.
4. Click **OK**.
5. Choose **Save As** or **Print**.

Options



Report Type determines the order in which items appear in the report:

by Location	Rules are listed in the same order in which they appear in the guideline.
by Variable	Rules are grouped by variable.

Print Range determines the location of the rules to be included in the report:

All	All rules are included in the report.
Selected Items and	Only rules on and within the selected item are included in the

Children	report.
Include Dictionary Rules	Rules attached to dictionary objects are included.

Field Options determine what additional information is included for each rule:

Position	Include the position of the item. Example: **005** ST **005.02** ST02
Ordinal	Include the internal TIBCO Foresight key for this item. This option is mainly for TIBCO Foresight use.
Name	Include the description for the item. Example: ST **Transaction Set Header** CLM **(Path: 2000A/2000B/2300)**
Path	Include the hierarchical path to the item. Example:

Concise Rule Text	Abbreviate the rule.
	Concise Rule Text not selected:
	`Always call External Routine BusinessRules.Variable. SetVar STseg`
	Concise Rule Text selected:
	`Run SetVar(STseg)`

Examples

Text Report

```
     Location                    Rule
 ---------------------- ----------------------------------------------
 **** Set 837 Rules
 SBR02 (1069)            ** Local Variable 'SBR02IndRelCode' Assigned

 SBR03 (127)             1. Always call External Routine
BusinessRules.Variable.SetVar
                            SBR03var

 CLM                     1. If SBR02IndRelCode EXISTS set Usage to 'Must
Use'
                         2. If SBR02IndRelCode DOESN'T EXIST set Usage
to 'Not
                           Used'

 HL                      1. If SBR02IndRelCode EXISTS set Usage to 'Not
Used'
                         2. If SBR02IndRelCode DOESN'T EXIST set Usage
to 'Must Use
```

CSV Report

```
"ID","Rule#","Rule"
"SBR02 (1069)","","Local Variable 'SBR02IndRelCode' Assigned"
"SBR03 (127)","1","Always call External Routine
BusinessRules.Variable.SetVar SBR03var"
"CLM","1","If SBR02IndRelCode EXISTS set Usage to 'Must Use'"
"CLM","2","If SBR02IndRelCode DOESN'T EXIST set Usage to 'Not Used'"
"HL","1","If SBR02IndRelCode EXISTS set Usage to 'Not Used'"
"HL","2","If SBR02IndRelCode DOESN'T EXIST set Usage to 'Must Use'"
```

Printing

Why Print from Standards Editor?

- You want “just the facts” without any formatting.
- You want a text file that is easily viewable with Notepad or another text editor.
- You want printed information about published standards as well as guidelines and MIGs.
- You want a listing of level 3 notes only.

For professional-looking formatted information about a guideline or MIG, suitable for distribution to trading partners, please use Doc Builder.

How to Print

Open a standard, guideline, or MIG.

1. In the top pane, click on what you want to print:

   If you click on the main dictionary or one of its subfolders, you can print dictionary information, and/or information about all of its transaction sets or messages.

   If you click on anything within a transaction set or message, you can print information about the segments, elements, and so on within that transaction. You can also print all level 3 notes on its elements.

2. Choose **File | Print**.
3. From the List Options dialog, choose what you would like to print. A mouse click toggles options on and off. These are described in List Options.
4. Choose OK.

Standards Editor creates your listing and displays it in a viewer. Look at the lower left corner to see the approximate number of pages.

To save the report to a text file, choose the **Save As** button.

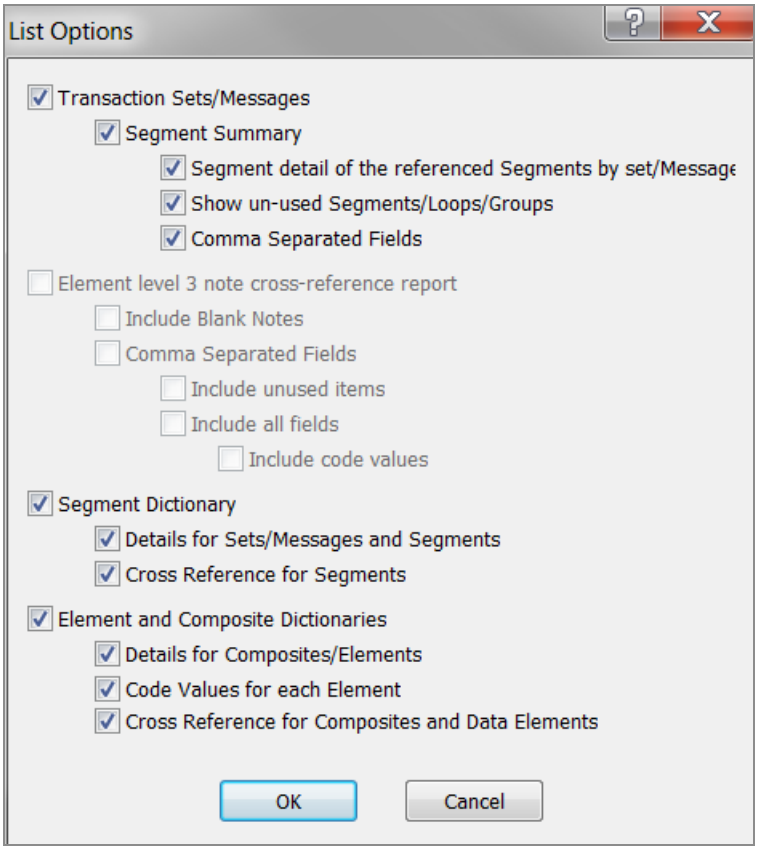
To print the entire report, choose the **Print** button. To print part of the report, first save it to a file and then use a text editor to print.

List Options

Before printing to paper or to a file (as described in How to Print), you will see the List Options dialog, where you select what information you want to print.

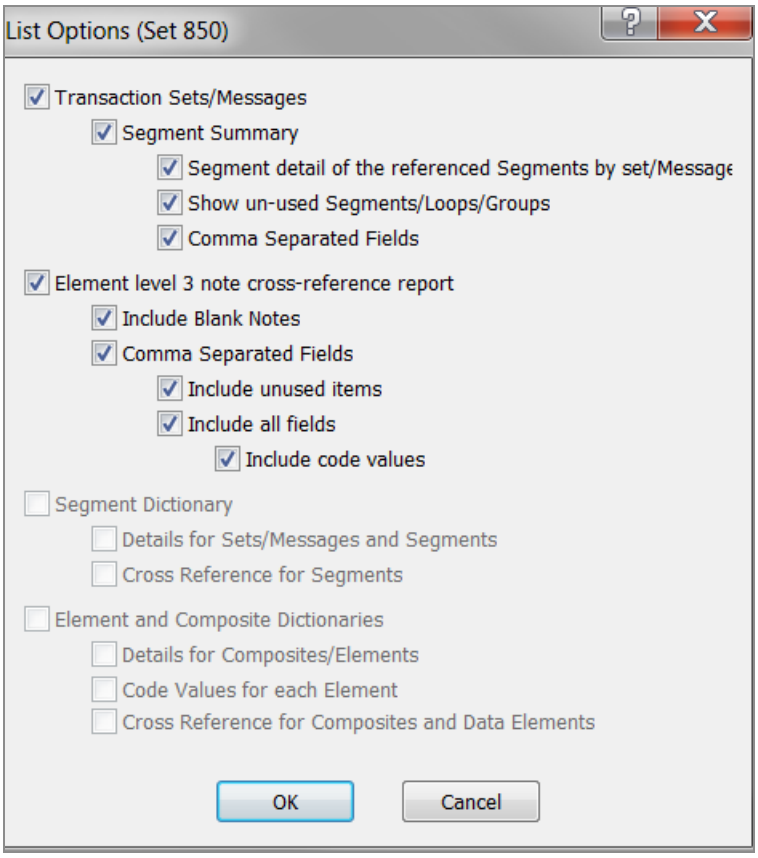
Dictionary Printing

If you have highlighted the dictionary, you will have the following active options from which to choose:



Transaction Printing

If you have highlighted the line containing the name of a transaction set or message, you will see these options:



Transaction Sets/Messages

Shows names and IDs of the selected transaction or message.

- Segment Summary

  Shows transaction set or message purpose, plus the list of used segments, loops, and groups in each transaction set or message.

- Segment detail of the referenced Segments by Set/Message

  Lists syntax notes or dependency notes for used segments, plus all of their elements. Code sets (user-changed lists of codes) are included. This selection does not show level 1, 2, or 3 notes.

- Show un-used Segments/Loops/Groups

  Includes unused items in the list of segments.

- Comma Separated Fields

  Instead of a table, the summary will be comma-separated.

Element level 3 note cross-reference report

Includes a table listing the location and contents of each level 3 note on an **element**. Example use: If you put the name of the corresponding application field in each element's level 3 note, you can use the level 3 note report as a brief mapping document.

- Include blank notes

  Includes all elements, including those without level 3 notes.

- Comma separated fields

  Instead of a table, the level 3 note report will be comma-separated. Within this selection you can choose to include unused items, all fields, and code values.

Structure and Value Records

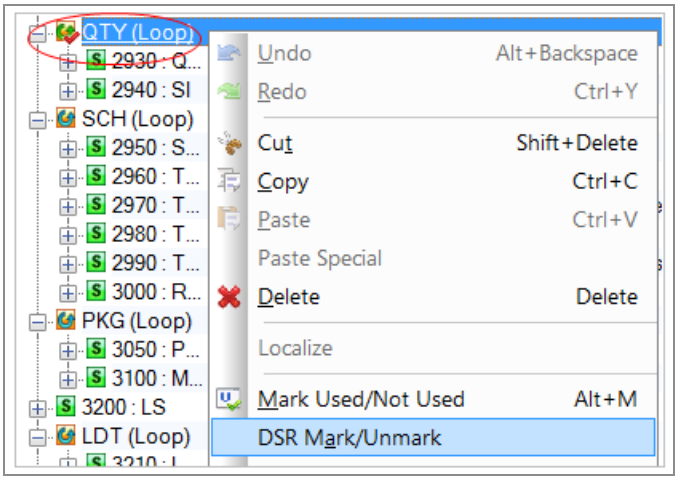
Overview of Structure and Value Records

Structure and Value records are for those developing guidelines for use with TIBCO Foresight's Instream validation product.

Your guideline can cause Instream to create structure and value records in its validation detail file.

Defining an Application Document

Right-click on a loop in EDISIM and choose **DSR Mark/Unmark**:



A red check appears over the loop's icon, indicating that you are declaring this loop and all of its sub-loops as an "application document."

When Instream validates EDI data with this guideline or one that has been merged from this guideline, it will place a 1 in the Document Flag field of the STRUS and STRUE records for this loop.

To toggle off the DSR designation, repeat the right-click and **DSR Mark/Unmark**.

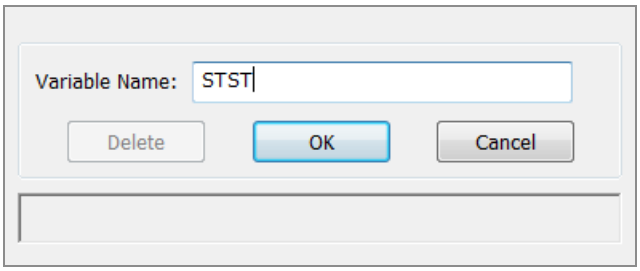
Creating guidelines for Instream

Instream's Response Generator and Document Splitter need certain modifications to their guidelines.

```
The TIBCO Foresight-distributed "guideline plus" HIPAA guidelines
already have these.
```

For non-HIPAA X12 guidelines:

1. Edit the guideline with Standards Editor, right-click on the ST segment, and choose DSR Mark/Unmark. Use Variable Name STST:



2. Open Dictionary Objects and then Segments and add these DSR marks also:

GS Segment DSR Variable Name GSSG
ISA Segment DSR Variable Name ISA1

For EDIFACT guidelines:

3. Edit the guideline with Standards Editor, right-click on the UNH segment, and choose DSR Mark/Unmark. Use Variable Name UNH or UNH1.
4. Open Dictionary Objects and then Segments and add these DSR marks also:

UNB Segment DSR Variable Name UNB
UNG Segment DSR Variable Name UNG

For details about what output a guideline can produce in Response Generator, see these sections in **ResponseGeneratorTechnicalManual.pdf**:

- Capabilities
- What you Need before Using Response Generator

Creating Value Records

You can create two types of value records:

- To create an **SVALU** record that contains all EDI in a particular *segment*, right-click on the segment and choose **DSR Mark/Unmark**. Enter a new structure ID, if desired.
- To create an **EVALU** record that contains the EDI value for a particular *element*, right-click on the element and choose **DSR Mark/Unmark**. Enter a new structure ID, if desired.

A red check appears over the icon for the segment or element, indicating that EDI data for this segment will appear in Instream's validation detail file.

When Instream validates EDI data with this guideline or one that has been merged from this guideline, it will create SVALU or EVALU records for this segment or element.

To toggle off the DSR designation, repeat the right-click and **DSR Mark/Unmark** and then click **Delete**.

Using your Guideline or MIG with Other Parts of EDISIM

Sample Scenario of Using a Guideline

Let's assume you have created the guideline MY4030 during the Quick Tour of Standards Editor. It is a subset of X12-4030 and contains one transaction set, 850. You are preparing for outbound EDI transmissions.

Now that you have the new guideline, how can you use it? The following brief list might help you to get started. For more detail on these operations, see their respective sections of the EDISIM documentation.

1. First, you **print a guidelines document** of the MY4030 guideline.
    a. Enter Doc Builder and choose **File | Open**.
    b. There is MY400, listed among the other guidelines. Highlight it and click **OK**.
    c. You will be asked to choose a transaction from the MY4030 guideline. There is only one: 850. Highlight it and click **OK**.
    d. After the guideline generates, Choose **File | Print Transaction Set**.
2. Before distributing the printed documents, you might want to **generate some test data based on guideline MY4030**.
    a. Enter Test Data Generator and choose F**ile | New | New Message/Set Model**.
    b. Select MY4030 from among the other guidelines, MIGs, and TIBCO Foresight-supplied standards.
    c. Customize the model a little, then save it to MY4030 and close it.
    d. Likewise, use **File | New | New Enveloping Model** and create one that matches what you'll be using. Save it to a new name.
    e. Choose **File | New | New Script** and insert the new message/set model and

enveloping model into it.

f. Create test data.

3. After data is created, go into Analyzer to check it. Choose **File | Open** and then choose the file that you created in Test Data Generator.

   When asked which standard should be used for the analysis, you choose MY4030, which appears along with the other guidelines, MIGs, and TIBCO Foresight-supplied standards. This lets you see if the test data conforms to the MY4030 guideline.

4. You distribute information to in-house staff working on the project, and to your trading partner(s) that are going to produce data that conforms to MY4030. This could include:

   - A paper copy of the guideline, and a printout of the test data file, or:
   - An exported RTF or word processor file of the guideline and a disk containing the test data.
   - Anyone having the same version of EDISIM could also get an export file containing the guideline MY4030, exported from Standards Editor in the SEF format.
   - Anyone with a SEF-compliant translator or mapper can directly load your guideline or MIG specifications into it.

Your **trading partners** can use the information in your packet to produce the correct EDI data, which they send to you.

Meanwhile, you use Test Data Generator to create data testing forced errors, boundaries, large volume, etc. The test files that you create are first run through the Analyzer to test for compliance to the MY4030 guideline, and then used with the translator to be sure that they can handle various situations.

These test data files are used to debug the translator. After that works, the application files that result from these translator tests are given to the applications programmers for testing and debugging the applications programs.

X12, EDIFACT, and TRADACOMS

X12 and EDIFACT Terminology

X12		EDIFACT	
Term	**Example**	**Term**	**Example**
Guideline	MY850	Message Implementation Guide or MIG	MYORDERS
Transaction Set	Purchase Order (850)	Message	Purchase Order (ORDERS)
Tables or Areas	Table 1 or Heading Area, Table 2 or Detail Area, Table 3 or Summary Area	Sections	Header Section, Detail Section, Summary Section
Functional Group Identifier	PO	n/a	
ID	850, ST, C00l, 143	Tag	ORDERS, UNH, C002, 0062
Syntax Note	“Only one of MEA03 and MEA08 may be present”	Dependency Note	“One and only one of UCM01 or UCM07 may be present”
Max Use	1	Repeat	1
Type Min Max	Example Type: AN Example Min: 1 Example Max: 12	Representation	AN..12 (variable length data) AN12 (fixed length

X12		EDIFACT	
			data)
Requirement or Usage: Mandatory Optional Recommended Dependent		Status: Mandatory Conditional Advised Dependent	
Loop	N1 loop	Group	NAD group or Group 1
Repeat Count	5	Maximum Use	5

TRADACOMS Considerations

TRADACOMS consists of various file formats, each containing three or four messages: a header message, a detail message, an optional VAT message, and a trailer message. The EDISIM TRADACOMS standard contains one message for each file format.

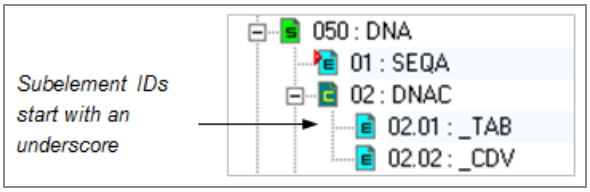
The name of each message in EDISIM is the same as the name of the TRADACOMS header message for the file format. For example, the Product Information message will be found under PROHDR.

Each message contains three or four tables: The first table corresponds to the header message, the second table corresponds to the detail message, etc. Since the detail message may occur more than once in a TRADACOMS message, we have created an MHD loop to encompass the entire Detail message.

TRADACOMS standards differ from X12 and EDIFACT standards in these ways:

- **Tables**: Both Standards Editor and Standards Reference now replace the Table identifier with the actual TRADACOMS message name when viewing TRADACOMS standards.
- **Code values**: TRADACOMS code values may be up to 12 characters long and include embedded dashes. See data element TTYP in segment TYP for an example.

- **Element IDs** include 4 alphabetic digits.
- **Subelement IDs** start with an underscore and cannot be used outside of a composite. They have been assigned by Standards Editor to serve as placeholders.



- **Element representations** are COBOL-style pictures preceded with either V or F. Examples:

Repr. V9(10) Min 1

Data should be numeric, 1-10 digits

Repr. FX(2) Min 2

Data should be 2 alphanumeric characters

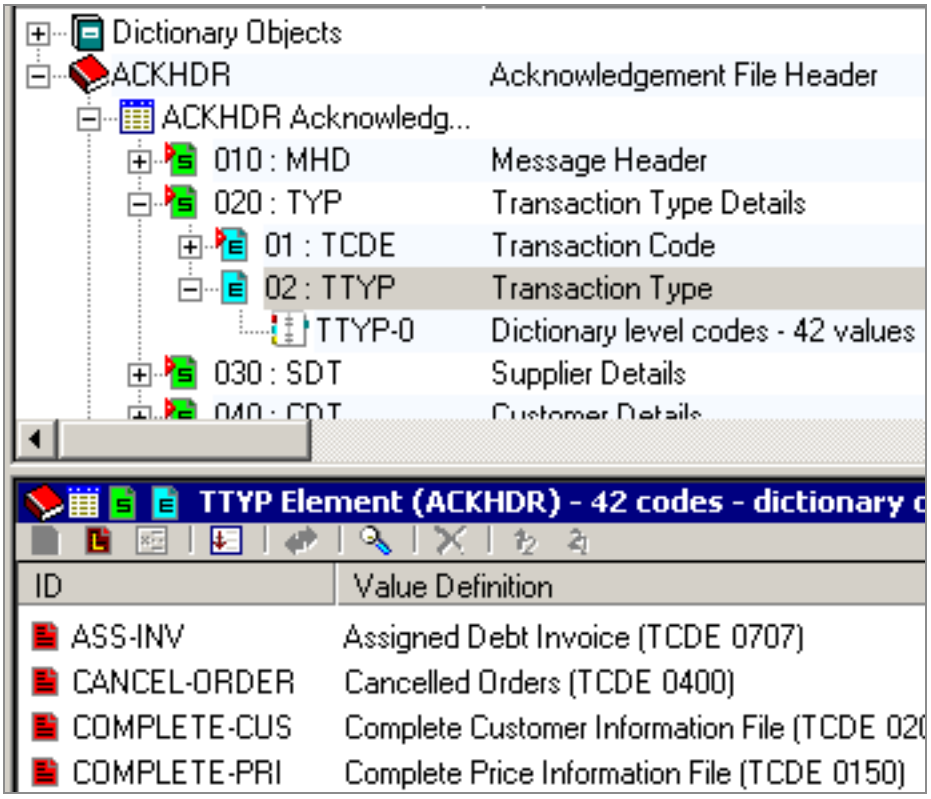
Repr. V9(10)V9(2) Min 1

Data should be up to 10 numeric digits followed by an implied decimal and 2 additional numeric digits (123456 in this element would be interpreted as 1234.56 and 1200 would be interpreted as 12.00). The implied decimal point is often used for prices and measures.

A picture might include:

V	(if first character in picture) variable-length data (minimum will not be same as the maximum)
F	fixed-length data
9	numeric data; minus signs and implied decimal points do not count toward the length
X	alphanumeric data
V	(if not the first character in the picture) the position of the implied decimal point
(*n*)	the number of digits or characters

TRADACOMS examples



FSdosutl

FSdosutl Overview

From the DOS prompt in EDISIM's Bin folder, you can use the **FSdosutl** utility to Export, Import, and Delete guidelines and MIGs.

The benefits of using **FSdosutl** instead of the Standards Editor menus include:

- You can use wildcards to include multiple guidelines and/or MIGs.
- **FSdosutl** can prompt you with the name of each guideline or MIG.
- You can use it from DOS.

Standards Editor menu choices:	FSdosutl method:	from EDISIM's Bin folder, use:
File | Export	fsdosutl -E	(**E** is upper case)
File | Import	fsdosutl -I	(**I** is upper case)
File | Delete	fsdosutl -R	(**R** is upper case)

Default file type for Exports and Imports is SEF.

Exporting from the Command Line

Go to the DOS prompt in EDISIM's Bin folder and follow this procedure (type the bold text).

This exports guideline MY856 to MY856.SEF in the Bin folder:

H:\EDISIM\BIN> **fsdosutl -E**

Standard to export (may be wild-carded, e.g., ACME*):**MY856**

Export file: MY856

To direct the file elsewhere, include a path:

H:\EDISIM\BIN> **fsdosutl -E**

Standard to export(may be wild-carded, e.g., ACME*):MY856

Export file: C:\EXPORT\MY856

FSdosutl Exporting using Wildcards

If you use wildcards for “Standard to export,” you will not be prompted for a filename. Each standard will be exported to a file with the same name as the standard, plus file type SEF. (notice the dot after the "-E" - for wildcard exports, a dot says to write to the current working folder)

C:\EDISIM40\BIN > fsdosutl –Ec:\edisim\export

Standard to export:*

(* for standard name gives you all guidelines and MIGs.)

Notes about wildcard exports:

- **Folder**: When doing wildcard exports, a folder name must follow the **-E** in the **FSdosutl** command. You can type a path (**fsdosutl -Ec:\edisim\export** where **export** is a folder, not a filename) or you can use a dot for the current folder. You must do one or the other.
- **Filenames**: each standard in a wildcard export goes to a separate file. The files have the same name as the standard they contain, and end with “.SEF.” **FSdosutl** prompts before overwriting an existing file.
- **More limited wildcards**: To export in smaller batches, you can be more specific with the wildcard. For instance, you could use A* to export all guidelines and MIGs that start with A (*A will not work, however. The wildcard must be at the end).
- **Memory:** If you have more than about 15 guidelines and MIGs, or if they are very large, memory limitations may prevent you from exporting all of them at once.
- **Network:** If you are running EDISIM from the network, you may need to adjust your commands to include the network drive and path.
- **Caps or lower case?** Capitalize all command line arguments (-E, -I, and -R).

FSdosutl Exporting using a Filespec on the Command Line

To export with no prompting for file or standard, type all information on the command line and use **-M** as follows.

No Wildcards

When using a specific standard name rather than wildcards, -**E** refers to the filename and -**M** refers to the standard name. Both **-E** and **-M** are case sensitive.

Format:

fsdosutl E*filename* **-M***standard*

Example:

fsdosutl -Ec:\edisim\export\ourinv -Mourinv

In this example, variable text is underlined. The only spaces are before the two dashes.

With Wildcards

To export with no prompting for standard or file, using wildcards, type all information on the command line and use **-M** as follows. The only spaces are before the two dashes. Variable text is underlined. When using wildcards, -**E** refers to the folder and -**M** refers to the wildcarded standard name.

Format:

fsdosutl -E*path* -**M***standards*

Example:

fsdosutl -Ec:\edisim\export -Minv*

FSdosutl Warnings during Export

Invalid ASCII data encountered

Call TIBCO Foresight Technical Support. The guideline or MIG is damaged and the export will probably fail.

Log file TEXTERR.LOG created due to errors in Database

Call TIBCO Foresight Technical Support. Some text has been lost in the guideline or MIG that you just exported: lost or corrupted level 1, 2, or 3 notes, names, semantic notes, comments, or any other text that you customized. It does not affect the structure of the guideline or MIG (such as the list of segments, what things are marked as unused, whether

they are mandatory, code sets, etc.). If the TEXTERR.LOG warning appears, information has been written to TEXTERR.LOG in EDISIM's Database folder. Each time **FSdosutl** finds an error when importing, exporting, or deleting, it appends to this file and includes the name of the standard being processed.

Importing from the Command Line

To import a standard, use the **-I** qualifier (which must be upper case). This example imports Edisim\Bin\My856.sef to guideline MY856. If MY856 already exists, you have a choice about overwriting, choosing another name, or canceling.

H:\EDISIM\BIN> fsdosutl -I

File to Import: c:\edisim\export\MY856

Deleting from the Command Line

To delete a guideline or MIG, use the **-R** (for “remove”) and -**M** (for the guideline or MIG) qualifiers with **FSdosutl**. -R and -M must be capitalized.

H:\EDISIM\BIN> **fsdosutl -R -M***standard*

standard can be a wildcard or a guideline or MIG name:

`fsdosutl -R -Mmy856`	Deletes my856
`fsdosutl -R -M*`	Deletes all guidelines and MIGs (confirms first)
`fsdosutl -R -Mmy*`	Deletes all guidelines and MIGs that start with the letters “my” (confirms first)

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- To create a Support case, you must have a valid maintenance or support contract with a Cloud Software Group entity. You also need a username and password to log in to the product Support website. If you do not have a username, you can request one by clicking **Register** on the website.

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