



**ELECTRONICS INDUSTRY DATA EXCHANGE
(EIDX)**

**GUIDELINES AND STANDARDS SUBCOMMITTEE
HANDBOOK**

November 1998

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**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

Purpose

This document discusses the Guidelines and Standards Subcommittee (GSS) and GSS Task Group information and processes:

- ✂ Subcommittee Information
- ✂ Task Group Information
- ✂ EIDX Transaction/Message Convention (Transaction Guideline)
- ✂ Support Documents

WORLD WIDE WEB REFERENCES

- ✂ Electronics Industry Data Exchange Association: <http://www.eidx.org/>
- ✂ Welcome to EDIFICE: <http://www.edifice.org/>
- ✂ EIAJ Semiconductor Home Page: <http://www.eiaj.org/>
- ✂ EDIMAN: <http://www.ncb.gov.sg/ncb/mfgclus/ediman/>
- ✂ UNTDID - UNITED NATIONS DIRECTORIES FOR EDI: <http://www.unece.org/trade/untdid/>
- ✂ Dun & Bradstreet Home Page: <http://www.DnB.com/>
- ✂ International Computing Centre: <http://www.unicc.org/>
- ✂ UN Trade Facilitation Standards & Recommendations: http://www.unece.org/trade/facil/tf_rec_h.htm
- ✂ UN ECE Trade Facilitation Recommendation 20, Codes for Units of Measure Used in International Trade: <http://www.unece.org/trade/rec/rec20en.htm>
- ✂ UN/ECE Trade Facilitation Recommendation 3, Code for the Representation of Names of Countries: <http://www.unece.org/trade/rec/rec03en.htm>
- ✂ UN/ECE Trade Facilitation Recommendation 9 Alphabetic Code for the Representation of Currencies: <http://www.unece.org/trade/rec/rec09en.htm>
- ✂ American National Standards Institute: <http://www.ansi.org/>
- ✂ FORESIGHT Web Pages: <http://www.foresight-edi.com/>
- ✂ DISA:Home Page: <http://www.disa.org/>
- ✂ International Standards Organization Online: <http://www.iso.ch/>

ABBREVIATIONS USED

ANSI	American National Standards Institute
ASC X12	Accredited Standards Committee X12 (ANSI)
EDI	Electronic Data Interchange
EDIFACT	EDI for Administration, Commerce and Trade
EDU	Education and Promotions Subcommittee
EIDX	Electronics Industry Data Exchange Association
GSS	Guidelines and Standards Subcommittee
STR	Strategy Subcommittee
UN	UN-EDIFACT, abbreviation used for EDIFACT

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Section 1 – Guidelines and Standards Subcommittee Overview

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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GSS Mission

The Guidelines and Standards Subcommittee develops implementation guidelines for ASC X12 transactions, EDIFACT messages and other standards, and publishes recommendations for usage of these transactions and messages (supporting documents).

ASC X12 transaction sets and UN EDIFACT messages are the usual standards. These publications are called EIDX Conventions, but colloquially called 'transaction set guidelines'. Supporting documents provide detailed implementation recommendations that apply to one or more transactions or messages.

XML is evolving as a possible standard for web-based electronic commerce. This and other developments in internet commerce are being evaluated by GSS.

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Roles and Responsibilities

GSS OFFICERS

The Guideline and Standards subcommittee officers consists of the following elected officers:

- ~~///~~ Chairperson
- ~~///~~ Vice Chairperson
- ~~///~~ Secretary

In addition, a Publications Administrator position will be introduced in 1999, and will probably be an appointed position.

GSS MEMBERSHIP

All GSS officers, all task group leaders, and any EIDX representative who has attended two of the last three EIDX conferences and attended any GSS general session during those conferences.

GSS OFFICER RESPONSIBILITIES

The Chairperson is responsible for the following:

- ~~///~~ Coordinate the scheduling of GSS tasks for the next conference
- ~~///~~ Responsibilities for leading GSS meetings and general sessions at the EIDX conference or interim meetings.
- ~~///~~ Tracks all GSS activities
- ~~///~~ Report GSS activities to the EIDX Board of Directors
- ~~///~~ If requested, present a plan of GSS activities at the opening session of the EIDX conference and present a summary of GSS tasks accomplished at the EIDX conference to the closing session
- ~~///~~ Reviews GSS ballot packets and sends to EIA.
- ~~///~~ Coordinate the ballot process
- ~~///~~ Support GSS tasks
- ~~///~~ Liaison to Strategy Subcommittee; attend all Strategy general meetings
- ~~///~~ Provide secretariat with list of awards recipients (plaques and certificates are issued at November conference).

The Vice Chairperson is responsible for the following:

- ~~///~~ Assumes all responsibilities of the Chairperson in his/her absence.
- ~~///~~ Distribute presenters' materials at the presenters' orientation session on the Monday morning of the conference.
- ~~///~~ Liaison with Foresight (provider of EDISIM software)
- ~~///~~ Liaison with other software providers
- ~~///~~ Support GSS tasks

The secretary is responsible for the following:

- ~~///~~ Responsible for minutes from all GSS general meetings/sessions within 30 days of the end of the conference.
- ~~///~~ Track attendance and GSS general sessions for purposes of determining who is eligible to vote on GSS matters.
- ~~///~~ Compile and distribute report packets to each GSS presenter at the EIDX conference
- ~~///~~ Compile status of each GSS task group from the meetings.
- ~~///~~ Maintain and distribute copies of the Foresight software.
- ~~///~~ Log who has copies of Foresight software.
- ~~///~~ Support GSS tasks

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GSS APPOINTEE REPONSIBILITIES

The Publications Administrator is responsible for the following:

- ~~///~~ Prepares the GSS ballot packet and sends to chair for review (chair sends to EIA).
- ~~///~~ Prepare documents for final publication. This includes all transaction and message guidelines, and all supporting documents.
- ~~///~~ Work with the web master at EIA to get publications posted to the EIDX web site.
- ~~///~~ Maintain GSS web pages and work with the web master at EIA to get web page updates posted.

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GSS Elections

NOMINATIONS

A GSS nomination committee will be appointed by the GSS Chairperson at the Fall EIDX Conference. The committee must consist of at least one person. A chairperson of the GSS nomination committee is selected by the GSS Chairperson.

The nominating committee will solicit EIDX members to run on the Guidelines and Standards Subcommittee ballot for the offices of: Chairperson, Vice Chairperson, and Secretary. Nominations will be called at the closing General Session of the Fall meeting. Additional nominations will be requested from the general membership until the Thursday two weeks before the next EIDX conference. It is preferred that a nominee be a member of GSS but it is not mandatory. The nominees must be from a member company of EIDX in good standing, and must be willing to commit to one year of service.

The chairperson of the GSS nomination committee shall preside over the GSS election. All nominees and their positions will be added to a paper ballot.

All nominees should obtain their management's support to attend all conferences while they are officers.

ELECTIONS

Elections are held at the Winter conference at the Guideline & Standards Subcommittee General Session. Nominations may be accepted from the floor.

The nominees are asked to leave the room while the ballots are counted.

Any EIDX representative who attends two of the last three EIDX conferences and attended any GSS general session during those conferences is eligible to vote in the November GSS election.

The written ballots are counted. The new officers will be announced in the GSS general session and at the Conference closing session.

In the event there are no nominations, the EIDX Board of Directors will appoint all officers from the membership at large.

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GSS Task Group Responsibilities

The work of the GSS is performed by Task Groups. A Task Group consists of the following members:

- ~~///~~ Task Group Leader
- ~~///~~ Task Group members
- ~~///~~ Task Group Mentor
- ~~///~~ Senior Technical Advisor (for complex tasks)

Anyone who has commitment from their company to participate and see a task through from beginning to end can lead a task group. The task group leader does not have to be an expert or long-time EIDX participant.

It is desirable to have a minimum of four members on the team. A mixture of technical and business expertise is desirable.

A senior technical advisor is a volunteer who is technically knowledgeable about the selective standard who can guide the task team through technical issues.

A task group mentor is assigned by the GSS Chairperson only if the task Group Leader is a novice to this process.

GSS OFFICER RESPONSIBILITIES WITH RESPECT TO THE TASK GROUP

The GSS Chairperson does the following:

- ~~///~~ Monitor task status from the task Leader between EIDX conferences
- ~~///~~ Schedule session(s) for the task group at the next EIDX conference.
- ~~///~~ Solicit attendance estimates from the Task Leader.

The GSS Secretary does the following:

- ~~///~~ Assign a copy of the Foresight EDISIM software and documentation to an individual in the task group if the task group does not have access to the software.
- ~~///~~ Obtain a signed agreement from each member who is given a copy of the Foresight EDISIM software, and manage the check in and check out process.

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TASK GROUP LEADER RESPONSIBILITIES.

A Task Group Leader organizes the task team to develop a business model or transaction guideline.

The Task Group Leader or a designated member in the task group has access to FORESIGHT EDISIM software. If (s)he does not have a copy of the software through her/his company, a copy will be supplied from EIDX. An EIDX copy of the FORESIGHT software can be used only for the EIDX task group and it cannot be used for their own corporate work. An agreement to this is signed and returned to the GSS Secretary.

The Task Group Leader does the following

- ~~/~~ Follows the steps in Section 4 below for Supporting Documents and/or the steps in Section 5 below for Guidelines development.
- ~~/~~ Informs GSS Chairman of the time needed for the next conference.
- ~~/~~ Delegates tasks to team members
- ~~/~~ Develops and reviews drafts of the document with the task group. The task group may develop the document between EIDX conferences to accelerate the process.
- ~~/~~ Provides copies of all necessary review and development documents for task group members at the conference plus a reasonable number of extra copies.

TASK TEAM RESPONSIBILITIES

The task team has the following responsibilities:

- ~~/~~ Solicit information from knowledgeable people about the subject matter.
- ~~/~~ Develop the desired document content

TASK GROUP MENTOR RESPONSIBILITIES

The task group mentor has the following responsibilities:

- ~~/~~ Guide the Task Group through Guideline Development.

SENIOR TECHNICAL ADVISOR RESPONSIBILITIES

The Senior Technical Advisor has the following responsibilities:

- ~~/~~ Provides technical recommendations about the selective standard in order to guide the task.
- ~~/~~ Reviews documents for consistency of standards and following published EIDX recommendations in support documents.

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Award Certificates

GSS RESPONSIBILITIES

Awards are issued annually at the Fall conference. The list of awards is due to the secretariat prior to the conference per the timeline established by the board timeline coordinator. Awards cover activities for the past year (roughly November to November).

WHO GETS AWARDS

The GSS Chair is presented with a plaque by the board. The chair does not need to submit his/her own name to the secretariat.

The GSS chair should submit names of the following to be given certificates:

- ~~///~~ Vice Chairperson
- ~~///~~ Secretary
- ~~///~~ Task group leader of completed guidelines or supporting documents. If a guideline or supporting document is expected to be completed at the conference where the award is given, the chair may choose to award the certificate at the current Fall conference. If there is question about completion, the award should be deferred to the following year's Fall conference.
- ~~///~~ Individuals who made significant contributions to a guideline, supporting document or other GSS activity.

GSS Project Flow and Timeline

TASK PROPOSALS

Most GSS tasks arise as the result of work done under the Strategy Subcommittee (STR). The EIDX Strategy Subcommittee has the responsibility to develop or change the EIDX business models and their related supporting documents. If a transaction/message guideline needs to be developed, modified or recast (upgrade from previous X12 or UN version, along with any necessary modifications), the first step is a review of the business models. Determining whether or not the business models need changing is an STR process. Refer to the Strategy Subcommittee Handbook for details on submitting a request for a new task.

A task group leader and a task group develop, modify or recast EIDX transaction/message guidelines and/or supporting documents.

Scope will have been determined in the Project Proposal phase in the STR process.

Exception for Supporting Documents

If the supporting document is a "general" GSS Supporting Document, not arising out of STR activities, and not related to particular Business Models (e.g. "Product and Other Identifiers"), a Project Proposal should be presented at a GSS General Meeting and approved by GSS. Use the Project Proposal format developed by the Strategy Subcommittee.

LEVELS OF PARTICIPATION

There are three levels of participation for task groups.

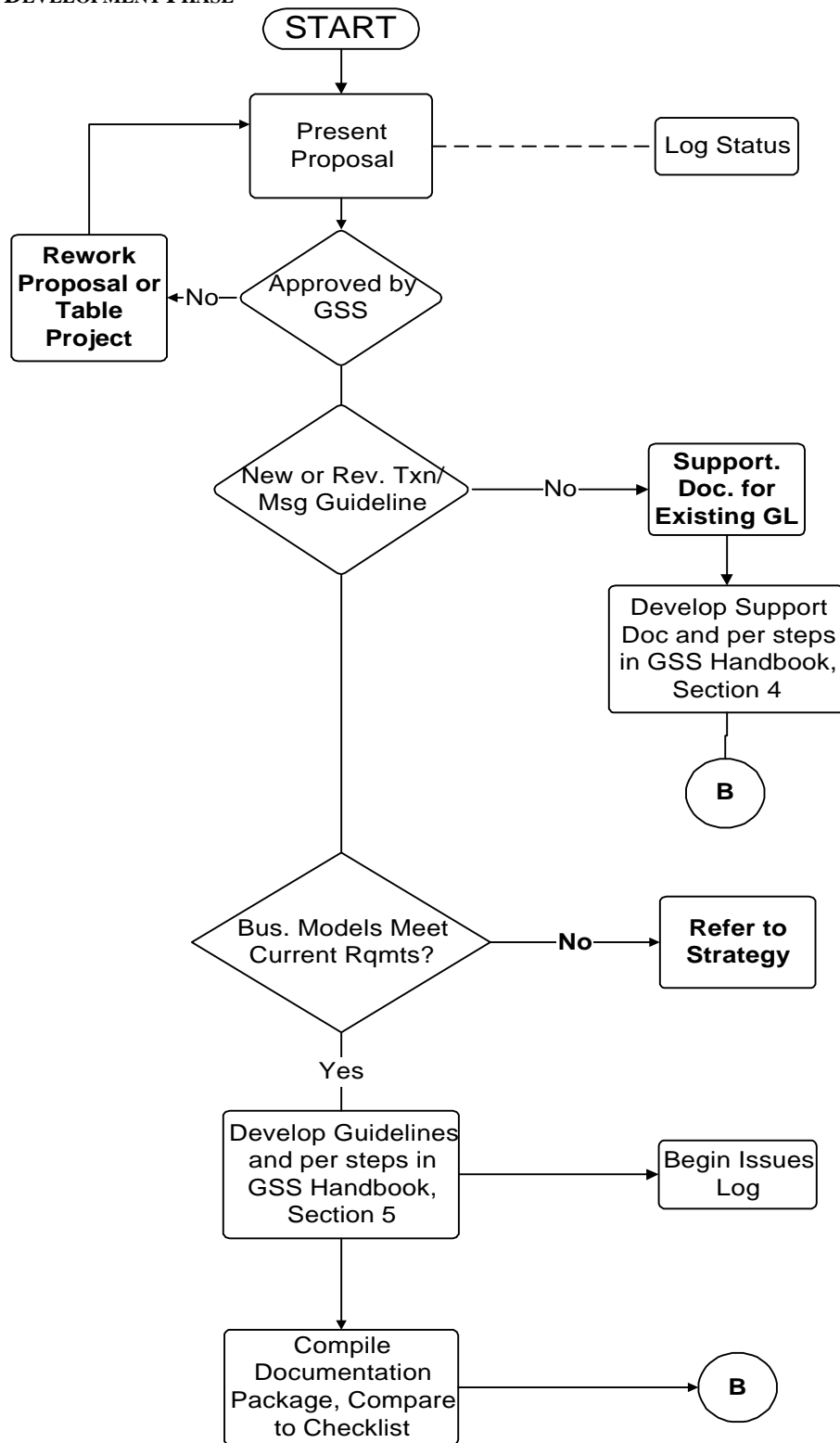
"*Beginner*" means the task group is at a stage where we can afford to do a lot of back-tracking for newcomers or new task group members. At this point, the development of the supporting document is less than 50% done.

"*Medium*" means that we can do some back-tracking, but we need to start limiting it in order to keep forward momentum. At this point, the development of the supporting document or guideline is about 50% done.

"*Advanced*" means no more back-tracking. At this point, the development of the supporting document or guideline is almost done and documentation is being prepared for balloting.

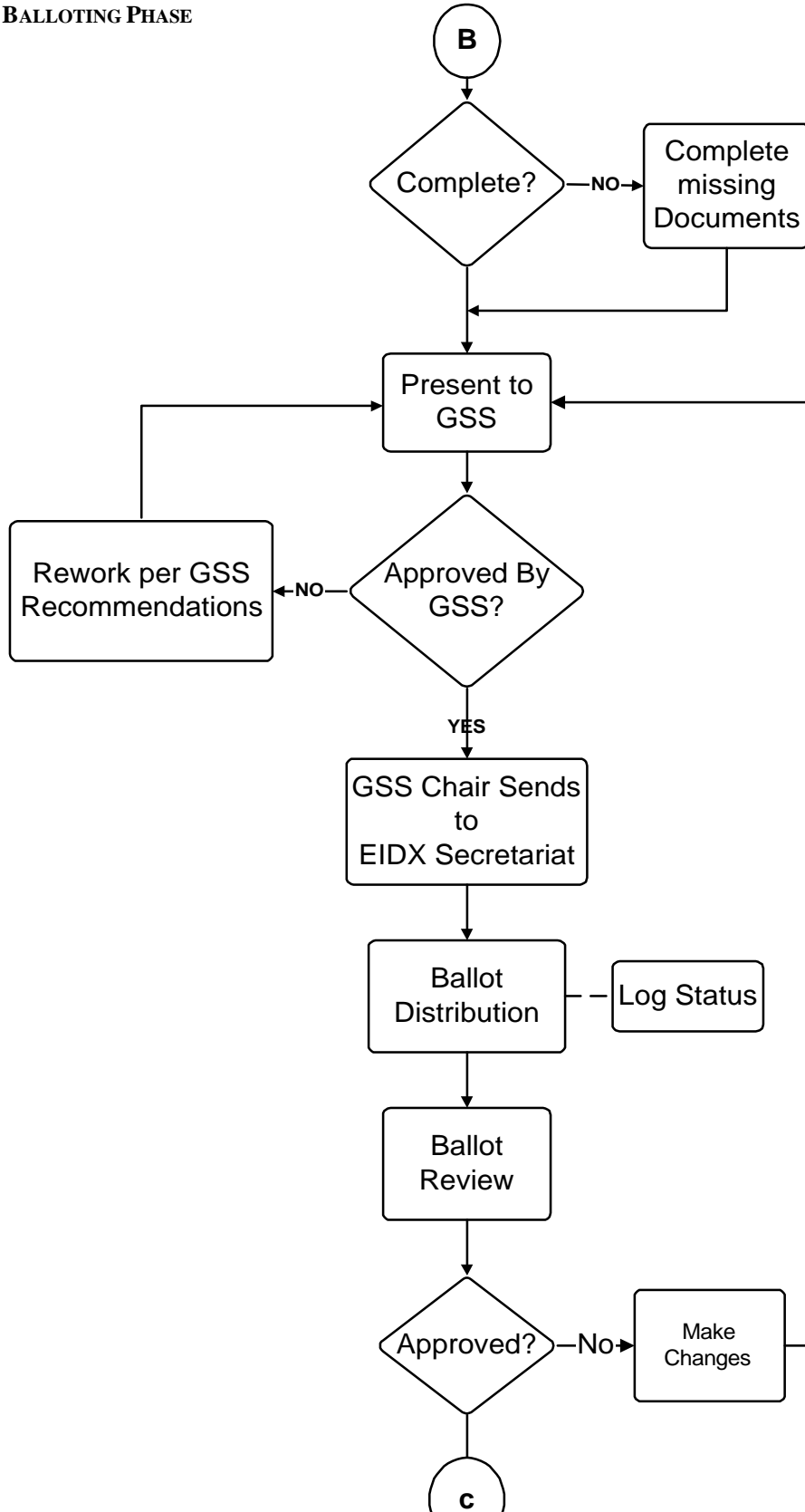
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DEVELOPMENT PHASE



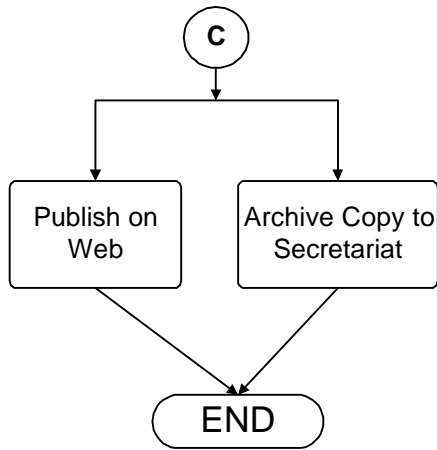
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BALLOTING PHASE



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PUBLICATION PHASE



PROCESS TIMELINES

Simple Supporting Document or Transaction/Message Guideline Re-Cast

Step	Length	Q1	Q2	Q3	Q4
Present Proposal	1 day	█			
Review Models	1 day	█			
Obtain Templates	1 day	█			
Obtain EDISIM	1 week	█			
Development	1 Quarter	████████████████████			
Final Reivew	1 day		█		
Rework based on Final Review	1 week		█		
Materials to GSS Chair	1 week		█		
Ballot Preparation	1 week		█		
Ballot Materials to EIA	1 week		█		
Ballot Distribution	1 week		█		
Balloting	30 days		██████		
EIA Compile and Send Results	1 week		█		
Prepare Responses	1 week			█	
Ballot Review	1 day			█	
Final Materials to GSS Chair	1 week			█	
Finalize and Publish	2 weeks			████	

Section 2 – EIDX Conference

Conference Preparation and Conducting Sessions

BETWEEN CONFERENCES

The GSS Chairperson has the following responsibility between conferences.

- ~~///~~ Follow-up with Task Group Leaders throughout the interim conference period on the task progress. This is especially important during the four weeks before the next conference.
- ~~///~~ Inform the Task Group Leaders of the number of RSVP's for their session one week before the conference and again two business days before the conference.

CONFERENCE SUPPLIES

Available upon Request

The latest version of the following documents may be obtained upon request from the GSS Chair or Vice Chair.

- ~~///~~ Session Preparation List for Presenter

Provided by GSS

The latest version following documents will be distributed by the GSS Vice Chair or EIA Secretariat on the first day of the conference. Check at the registration desk for your materials.

- ~~///~~ Session Report(s) for Presenter
- ~~///~~ Attendance Sheet(s)
- ~~///~~ (Opt.) Blank transparencies
- ~~///~~ (Opt.) Marking pen for transparencies

Provided by EIDX, Host or Hotel

The following supplies are usually provided by the hotel, the host company, or EIDX:

- ~~///~~ Overhead projectors
- ~~///~~ Projector screen
- ~~///~~ Flip charts
- ~~///~~ Flip chart markers

Limited Availability

If you need any of the following supplies, submit a request to the GSS Chair as far in advance as possible. If there are more requests than available supplies, you may have to do without, or supply the item yourself.

- ~~///~~ LCD projector (a/k/a "Data View" for projecting from a PC)

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Task Group Leaders Need to Bring

Task group leaders need to provide the following.

- ~~/~~ Agenda, or be prepared to set the agenda at the start of the session
- ~~/~~ Presentation overheads (a/k/a foils, slides); even if you are using an LCD projector, you should have these ready in case the projector doesn't work or becomes unavailable
- ~~/~~ Handouts only if needed (save a tree!)

CONDUCTING THE SESSION

- ~~/~~ Introduce yourself and give a brief overview on what you will be covering.
- ~~/~~ Have participants introduce themselves, unless the group is so large that this will prevent you from accomplishing the intended goals of the session.
- ~~/~~ Have someone volunteer to take notes.
- ~~/~~ Review the agenda.
- ~~/~~ Have someone volunteer to keep time and help keep things on track.
- ~~/~~ Begin passing around the attendance sheet.
- ~~/~~ Pass out your documentation (if applicable).
- ~~/~~ Begin discussing the material.
- ~~/~~ Close the workgroup and give a summary of next steps.

BEFORE CONFERENCE CLOSING SESSION

The GSS Chairperson has the following responsibility before the EIDX Closing Session at the conference.

- ~~/~~ Obtain the Session Report from each presenter. Summarize it for presentation at the EIDX closing session.

Section 3 – Publication Guidelines

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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Publications

PUBLICATIONS SOFTWARE

Check the *EIDX Publications Policies and Procedures* document for the most current information. As of this writing, EIDX Guidelines are to be produced or published with the following software. This document also contains style guidelines for web publication.

BUSINESS MODELS:	Microsoft PowerPoint 95 or higher
TRANSACTIONS/MESSAGES:	
Segment table and segment detail.	Foresight EDISIM. Develop using EDISIM Standards Editor. Export draft version into .SEF (Standards Exchange Format) every quarter and give copy to GSS chair. Export final version into .SEF file and give to GSS chair. Use EDISIM document builder to generate .RTF document file.
SUPPORTING DOCUMENTS:	Microsoft Word 6.0/95.
Content	Per template (See Appendix A).
Formatting	Per template (See Appendix B.)
GUIDELINES:	Microsoft Word 6.0/95
Template (front matter)	Microsoft Word 6.0/95
Transaction/message examples.	Microsoft Word 6.0/95
Content	Per template (See Appendix C).
Formatting	Per template (See Appendix D).
ISSUES LOGS:	Microsoft Word 6.0/95.
Content	See template.
Formatting	See template.

HARDCOPY PUBLICATIONS

Hardcopy publications of Guidelines and Standards Supporting Documents and Guidelines are not available. Documents may be obtained from the Members area of the EIDX website or diskette copies may be obtained from the EIDX Secretariat. There is a reproduction and handling charge for publications on diskette.

WEB PUBLICATIONS

Guidelines and Standards has two areas of concern on the EIDX Web Site – a public area (materials available for public consumption), and an EIDX Members Only area (materials available for member use only). The directory structure is documented in the *EIDX Publications Policies and Procedures* document.

The following lists the GSS materials that are to be available on the EIDX Web Site.

Public Area	Type	Members Only Area	Type
GSS Homepage:	HTML	Guidelines - pre 8/98:	SEF and Word 6.0/95
GSS Activities:	HTML	Guidelines - from 8/98 on:	SEF and RTF
GSS Presentations:	PDF	Supporting Documents	MS Word 6.0/95
Supporting Documents:	PDF	GSS Handbook	MS Word 6.0/95
Guidelines:	PDF		

Section 4 – Supporting Documentation

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GSS Task Group Supporting Document Steps and Checklist

Task Group: _____

Leader: _____

	Guideline Development Task	Date Started	Date Ended	Performed by:
1	Obtain template/existing document(s) from GSS chair			
2	Review Business Model(s)			
3	Review relevant Issues Logs			
4	Determine if separate Supporting Document necessary			
5	Write draft supporting document.			
6	Print and Distribute draft.			
7	Determine if changes needed for any transaction or message guidelines; note on Issues Log.			
8	Complete the supporting document.			
9	Final Review of Document with Task group and Technical Advisor			
10	Turn over document and file(s) to GSS Chairperson for balloting 8 weeks before conference in which ballot review is to take place.			
11	Ballot and Ballot Review			
	Go to Ballot and Review Task Checklist			
12	Turn Over final document and file(s) to GSS Chairperson after verifying that files are virus-free			

Supporting Documentation: Development Steps

The EIDX Supporting Document should be written with the 80/20 rule considered for Electronics Industry usage. An individual company's requirements may not always be satisfied.

Scope will have been determined in the Project Proposal phase in the Strategy Subcommittee process. If the supporting document is a "general" GSS Supporting Document, not arising out of STR activities, and not related to particular Business Models (e.g. "Product and Other Identifiers"), a Project Proposal should be presented at a GSS General Meeting and approved by GSS. Use the Project Proposal format developed by the Strategy Subcommittee.

1. OBTAIN TEMPLATE AND/OR EXISTING SUPPORTING DOCUMENTS

If this is a revision, request a copy of the existing Supporting Document from the GSS Chair. If this is a new Supporting Document, request from GSS chair copy of current Supporting Document template or previously published supporting document to use as a template. Although content and formatting guidelines are contained herein, the process is far simplified by using a template or existing document from which formatting can be copied.

Actual contents will vary depending on the main subject of the document, so seeing what topics have been included in supporting documents for related subjects can be helpful.

2. REVIEW BUSINESS MODEL

Business models are the root process. Business scenarios or examples can be derived from an understanding of the business model. In order to develop a supporting document, the business model must be reviewed to avoid making recommendations that are in conflict with the business models. A comparison to other industry business models and transaction guidelines may be helpful.

~~///~~ If an EIDX business model does not exist, any exception to proceed with a guideline or supporting document must be approved by the Strategy Subcommittee.

Recommendations made in the Supporting Document may result in a need to make changes to existing business models. Substantial changes may require a new task group to develop it. Minor changes may be suggested from this work group such as adding transactions which were not addressed previously. All business model changes must be approved by the EIDX membership.

3. REVIEW ISSUES LOGS

Review relevant Issues Logs. Obtain these from the GSS Chair. Identify any issues which can be addressed in this supporting document and include them.

4. DETERMINE IF SUPPORTING DOCUMENT NEEDED

Determine if the necessary recommendations are few enough that they can be contained within a transaction/message guideline (in segment and element notes) or if a separate supporting document is merited. If separate document is merited, continue with supporting document process.

5. WRITE DRAFT SUPPORTING DOCUMENT

Supporting Documentation is one of those activities where it helps the session attendees have something to start with. The task group leader should write at least a skeleton draft or outline before the first session. Solicit ideas for topics from session attendees. Some topics will have arisen out of review of the business models, the issues logs, and during transaction/message development. Task group members may volunteer to write sections or topics, but the task group leader should do all final incorporation and editing.

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6. PRINT and DISTRIBUTE COPY OF FULL SUPPORTING DOCUMENT

Generate a copy of the full Supporting Document to be reviewed. Distribute a copy to each member on the task group

7. DETERMINE IF CHANGES NEEDED TO TRANSACTION GUIDELINES

Determine if changes are needed to any transaction or message guidelines as the result of recommendations in this document. Note these on an issues log.

8. COMPLETE THE SUPPORTING DOCUMENT

Complete all sections of the Supporting Document including the preface and Table of Contents.

9. FINAL REVIEW DOCUMENT WITH TASK GROUP and TECHNICAL ADVISOR

Have a final review with the task group and technical advisor. Resolve any final issues. This final review may occur between EIDX conferences. Any unresolved issues may be discussed with the GSS officers.

10. TURN OVER DOCUMENTS to GSS CHAIRPERSON for BALLOTING

Documents need to be submitted to the GSS Chair at least 8 weeks before the conference where the ballot review is to take place. See balloting procedures in Section 6. The Task Group Leader shall give the following to the GSS Chairperson:

~~☞~~ All sections of the Supporting Document on a diskette or as e-mail attachment.

11. BALLOT and BALLOT REVIEW

See balloting procedures.

12. TURN OVER FINAL DOCUMENTS to GSS CHAIRPERSON

The Task Group Leader shall give the following to the GSS Chairperson:

~~☞~~ All sections of the Supporting Document on a diskette or as e-mail attachment.

<i>NOTE: Check all files and disks for viruses before handoff to GSS.</i>

The EIDX GSS Chairperson will have the document formatted in WORD into its final format for ballot publication. The details of the final formatted document are listed in this section.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

Supporting Documentation: File Naming Conventions and File Management

FILE NAMING CONVENTION

GSS uses 8 character filenames because not all systems can yet handle long file names.

Contact the GSS Chair for assignment of the two-byte topic identifier for new Supporting Documents.

Bytes	Description	
<i>1</i>	<i>Subcommittee Identifier</i>	
	G	Guidelines and Standards Subcommittee
<i>2-3</i>	<i>Document Type</i>	
	il	Issues Log
	sd	Supporting Document
<i>4-5</i>	<i>Topic Identifier</i>	
	bo	Blanket Purchase Orders
	fc	Transactions used in Forecast Processes
	id	Product and Other Identifiers
	iv	Inventory Management
	pc	PO Changes and Acknowledgments
	pd	Static Product Data
	pp	Price Protection Processes
	pr	Price Catalog
	qt	Request for Quote and Quotation Processes
	rf	Response to Forecast Processes
<i>6-7</i>	<i>Version Code (Software version)</i>	
	95	Microsoft Word 6.0/95
	97	Microsoft Word 97

Examples:

Gsdid95.doc	Product and Other Identifiers, January 1997, Word 6.0/97
Gsdfc97.doc	Transactions and Messages used in Forecasting, March 1997, Word 97
Gilfc95.doc	Issues log for forecast transactions/messages, Word 6.0/97

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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FILE LOCATIONS

Word 97 Files	Kept by GSS chair; redundant copies kept by secretariat.
Word 95 Files	Posted on EIDX web server; redundant copies kept by GSS chair and secretariat
HTML Files	Posted on EIDX web server; redundant copies kept by GSS chair.

REVISIONS

Open the master file and add a note to the revision history, noting that a revision is underway, and where the draft file is located (i.e. who is working on the revision).

Section 5 – Transaction and Message Guidelines

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

GSS Task Group Guideline Development Checklist

Task Group: _____

Leader: _____

	Guideline Development Task	Date Started	Date Ended	Performed by:
1	Determine project scope (development, redevelopment or recast)			
2	Obtain Template/Copy of Existing Guidelines and EDISIM Software			
3	Review Business Model and Establish Guideline Scope			
4	Review relevant Issues Logs			
5	Migrate from old version to new and resolve exceptions (if applicable)			
6	Develop the Transaction/Message Detail.			
7	Develop Transaction/Message Example (s)			
8	Complete the guideline document			
9	Final Review of Document with Task group and Technical Advisor			
10	Turn over document and file(s) to GSS Chairperson for balloting 8 weeks before conference in which ballot review is to take place.			
11	Ballot and Ballot Review			
	Go to Ballot and Review Task Checklist			
12	Turn Over final document and file(s) to GSS Chairperson after verifying that files are virus-free			

Transaction Set or Message Guideline: Development Steps

The EIDX transaction guideline should be developed with the 80/20 rule considered for Electronic Industry usage. An individual company's requirements may not always be satisfied.

1. DETERMINE PROJECT SCOPE.

Identify whether this a development of a new guideline, a redevelopment of an existing guideline, or a recast of an existing guideline into another version.

To recast something is to put it into a new form without changing its basic content. To redevelop something is replan or rebuild something in a different way.

Guidelines Recast

In a Guidelines Recast, we take an existing published guideline and simply migrate (or transfer) it to a newer version of the standards, without making any fundamental changes. The only changes which will be allowed will be those necessitated by changes in the standard (a segment, code or element we use no longer exists). In the EIDX 4010 Recast project, we allowed some changes to code lists that were based on already balloted and approved supporting documents, most particularly changes recommended in *IMPLEMENTATION RECOMMENDATIONS FOR PRODUCT AND OTHER IDENTIFIERS* (June 1997).

The following are permitted in a recast:

- ?? Copy EIDX Usage, segment for segment, element for element, code for code, in the newer version
- ?? Add segments, elements or codes which replace segments, elements or codes that were used by EIDX but no longer exist in the standard
- ?? Typographical and grammatical corrections
- ?? Formatting changes (e.g. recast front matter into current template for front matter, recast examples into new format for presenting examples)
- ?? Changes based on already balloted and approved supporting documents

The following are not permitted in a recast:

- ?? Fundamental content changes such as adding other segments, elements or codes, even though they support current business practices and we believe we need them added to the guideline
- ?? Editorial changes to notes other than typographical, grammatical or formatting changes, even though they might enhance the interpretation of the guideline

Guidelines Redevelopment

In order to make the kinds of changes that are not permitted in a recast, a full task group must be formed to do a guideline redevelopment, following the steps for transaction guidelines development below. Review of the Business models is an essential part of the redevelopment process. All the segments, elements and codes in the transaction need to be evaluated, and the changes need to be submitted to the EIDX voting members for approval via ballot.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

2. OBTAIN TEMPLATE and/or COPY OF EXISTING GUIDELINES, and EDISIM Software

If this is a revision, obtain copies of the existing files from the GSS Chair. If this is a new guideline, reviewing existing EIDX transaction guidelines or other association transaction guidelines may facilitate the development of new EIDX transaction guidelines. Obtain copies of necessary document from the EIDX WEB site or contact the GSS Secretary for specific guidelines, if necessary.

The following items will be provided for all projects:

- ?? MS Word Template for the transaction guideline (version 6.0 or 97 available)
- ?? Master MS-Word template of segments to use for creating the examples (master examples template, version 6.0 or 97 available)

The following items will be provided if this is a redevelopment of an existing guideline:

- ?? The SEF file for the old guideline (or this may be obtained from the EIDX web site)
- ?? Word or RTF document for the old guideline

The following items must be requested:

- ?? If you do not have Foresight's EDISIM software, a copy can be loaned to you for EIDX guidelines development work. The software may not be used for any other purpose. Contact the GSS secretary to obtain the software.
- ?? If you are working on a new transaction or message (no previous EIDX guideline exists), you may find it useful to obtain some guidelines that member companies may already have developed, or other industry guidelines for comparison. Ask your task group participants if any of them have access to guidelines from their company or other industries.

3. REVIEW BUSINESS MODEL and ESTABLISH GUIDELINE SCOPE

Business Model Review Not Required for Recast

In a recast, review of the business models is not required because no fundamental changes are permitted in the transaction guideline.

Business Model Review Required for all Development and Redevelopment

Business models are the root process. Business scenarios or examples can be derived from an understanding of the business model. In order to develop a guideline and sample, the existing business models must be reviewed before the segments, data elements and code lists within the transaction.

- ~~///~~ If an EIDX business model does not exist, any exception to precede with a guideline or supporting document must be approved by the Strategy Subcommittee.
- ~~///~~ If the EIDX business model exists, review the business model for transaction set usage. The business model may highlight the need for several transaction guidelines for the same transaction.
- ~~///~~ If several EIDX business models exist, decide on the scope for the development of the guideline. Will the guideline support all existing business models, or just a subset? If there are different business scenarios for a given transaction in a business model, consider developing multiple transaction guidelines if it enhances readability of the guideline. Developing multiple transaction guidelines may be time consuming. Additional task groups may be formed to subdivide the transaction guideline development. A task group should focus on one transaction guideline at a time.
- ~~///~~ A new transaction guideline may require changes to existing business models. Substantial changes may require a new task group to develop it. Minor changes may be suggested from this work group, such as add transactions which were not addressed previously. All business model changes must be approved by the EIDX membership.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

4. REVIEW ISSUES LOGS

Review relevant Issues Logs. Obtain these from the GSS Chair. Identify any issues which can be addressed in this guideline and include them.

5. IDENTIFY BASIC DATA REQUIREMENTS

If a list of basic data requirements was not already developed when the business models were created, identify those requirements now. Do not be constrained by what is and is not in the standards. What data needs to be contained in the transaction/message, and at what level (header, detail, schedule, etc.).

6. DEVELOP THE TRANSACTION/MESSAGE DETAIL.

This is the step where most of the session work is concentrated. Encourage a lot of participant interaction

The process may be iterative.

- ~~///~~ You may go back and forth between sections of the transaction/message while developing the detail.
- ~~///~~ You may go back and forth between reviewing data requirements (Step 5, development of examples (Step 7) and this step.
- ~~///~~ If issues come up that require some research, give the task group participants homework assignments
- ~~///~~ Holding phone conferences between sessions can speed up the process.

Develop the transaction/message detail in EDISIM by doing the following:

Developing Detail - Summary:

- ~~///~~ If this is a redevelopment where a transaction/message is being migrated from an old version to a new version (e.g. from 3020 to 4010), you need to decide whether you want to rebuild the new transaction/message detail from scratch, or whether to use EDISIM tools to migrate from the old SEF to the new SEF. Migrating SEF files can save a lot of time if the transaction/message isn't going to change fundamentally. GSS has separate documentation on how to do SEF migrations and on verifying migrations. If you decide to rebuild the detail from scratch, just go to the next step (Develop the Transaction/Message Detail).
- ~~///~~ If migrating from an older version to a newer version, resolve exceptions, i.e. what to do if a segment, element or code used by EIDX in the old version does not exist in the new version.
- ~~///~~ Mark the segments USED or NOT USED in the two tables at the beginning of the transaction guideline.
- ~~///~~ For any segment or element that is used and is not Mandatory in the standards, add EIDX usage.
- ~~///~~ Add notes where appropriate for the entire transaction, the entire segment, or the specific data element.
- ~~///~~ Review code lists for each data element to determine if an EIDX subset code list should be specified.
- ~~///~~ Add codes in EDISIM when appropriate (see "Adding Codes" below).
- ~~///~~ Review your list of basic data requirements to see if everything is accounted for. If every data requirement could not be accounted for, follow the same review process as for "Resolving Exceptions in a Version Migration.
- ~~///~~ Review Issues Logs and the *GSS Supporting Document Implementation Recommendations for Product and Other Identifiers* to see what needs to be incorporated into the guideline you are working on.

Do not change the standards!

- ~~///~~ If a segment or element is not used by EIDX, do not delete it. Mark it NOT USED.
- ~~///~~ If a segment purpose or element description does not match EIDX usage, do not change the standard. Leave all standards text as-is. If the purpose or description in the standard does not apply for EIDX's particular guideline, add explanatory EIDX notes. Use phrases like "does not apply."

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

Detail procedures

Detail procedures are in the next topic of this section (*Building Detail using EDISIM Standards Editor*).

Handouts

When working a new transaction/message from scratch, it may take several trees-worth of paper to print out the full transaction/message content (all possible segments, elements and codes). Before the first development session, you may want to take a first pass at identifying used segments, elements and codes, and handouts of this may be helpful for the members of the task group (session attendees). EDISIM contains the entire content of the chosen standard. Data shows are becoming more and more available at conferences, so that you can project EDISIM to a screen. If a data show is not going to be available for your session, can someone at least have a laptop present with EDISIM loaded (for reference). You may also consider printing out a subset of what you expect to cover in that session.

You may find it helpful to develop preliminary examples (Step 5) before completing the transaction/message detail. The process is iterative - you will go back and forth between transaction/message detail and examples.

7. DEVELOP TRANSACTION/MESSAGE EXAMPLE(S)

Examples are a valuable aid for interpreting the guideline and understanding how to implement a transaction/message to support a business process. The transaction example and its English interpretation makes stepping through the entire transaction segment by segment, data element by data element, code lists by code lists more meaningful and cohesive. The English interpretation in the example must address *every* data element which is in the example. Look at the template, and obtain a copy of existing examples for other transactions/messages to expedite the process and understand the format.

Develop Examples from the Business Models

The examples should support the processes in the associated business models being discussed in the guideline. If there are different "flavors" of the transaction/message for different models, there should be an example for each. For example, a DELFOR guideline would have examples for a Planning Forecast (Forecast/Planning Model 1), a Material Release Forecast (Forecast/Planning Models 2 and 3), and so on. If there are different scenarios for the same business model, multiple examples would be appropriate. For example, an 843 guideline would have examples for a Spot Buy Quote, a Time and Materials Quote, etc.

Since the examples are part of the guideline document, instructions are covered there. In this step, you want to do the preparatory work, including deciding which examples to develop, and doing draft examples.

8. COMPLETE THE GUIDELINE DOCUMENT

Complete all sections of the guideline. The template file contains hidden text which should step you through the process.

The guideline document includes:

- ?? Front matter
- ?? Segment tables
- ?? Segment detail
- ?? Transaction/Message Examples

Detail steps are below under "Building the Guideline Document."

9. FINAL REVIEW DOCUMENT WITH TASK GROUP and TECHNICAL ADVISOR

Have a final review with the task group at the conference prior to balloting, and with the and technical advisor (if applicable). Resolve any final issues. Any unresolved issues may be discussed with the GSS officers. Don't forget to check spelling and grammar.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

10. TURN OVER DOCUMENTS to GSS CHAIRPERSON for BALLOTING

Documents need to be submitted to the GSS Chair at least 8 weeks before the conference where the ballot review is to take place. See balloting procedures in Section 6. The Task Group Leader shall give the following to the GSS Chairperson:

- ~~✍~~ All sections of the Transaction Guideline on a diskette or e-mail attachment, including SEF and RFT files from Foresight, and the updated WORD documents.

11. BALLOT and BALLOT REVIEW

See balloting procedures.

12. TURN OVER FINAL DOCUMENTS to GSS CHAIRPERSON

The Task Group Leader shall give the following to the GSS Chairperson:

- ~~✍~~ All sections of the Transaction Guideline on a diskette, including SEF and RFT files from Foresight, and the updated WORD documents.

NOTE: Check all files and disks for viruses before handoff to GSS.

The EIDX GSS Chairperson will have the document formatted in WORD into its final format for ballot publication. The details of the final formatted document are listed in this section.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

Building Detail using EDISIM Standards Editor

CREATING A NEW GUIDELINE

- ✂ Go into Standards Editor
- ✂ Select File – Build New Standard
- ✂ Select the version the standard is being built from, e.g. D97A or X12-3070, if the imported SEF file is the same version, build from the SEF you just imported.
- ✂ Select the Transaction or Message
- ✂ Before going any further, select File – Save As, and save using same filename that will be used for SEF file, e.g. Aps3070x for a version 003070 830. See EIDX filenaming conventions below. Description should include “EIDX”, the version and the transaction or message ID.
- ✂ EDIFACT guidelines: Start by adding the 'XXX' segments. These are "dummy" segments where the Segment Group attributes and description are documented.
- ✂ Segments are defaulted to ‘USED’. Mark the segments EIDX will not use as ‘NOT USED’
- ✂ Double click on the segment to modify segment attributes and add segment level notes, such as EIDX Usage. Do not use carriage returns in notes unless absolutely necessary. Text will wrap around. Manual line feeds (SHIFT + Return) can be used here. All notes can be entered as Level 1 notes.
- ✂ For non-mandatory segments and elements, EIDX usage should be the first thing in the notes for the segment or element. Type "EIDX Usage:" then the usage designator. Example: "EIDX Usage: ADVISED". All notes can be entered as Level 1 notes.
- ✂ Double click on the data element to modify element attributes and add element level notes, such as EIDX Usage. Do not use carriage returns in notes unless absolutely necessary. Text will wrap around. Manual line feeds (SHIFT + Return) can be used here. All notes can be entered as Level 1 notes.
- ✂ If EIDX is not limiting which codes are used on a code list (in other words, any valid code may be used), do not mark code values for the element.
- ✂ If EIDX is limiting which codes on a code list are recommended for use, choose Edit – Code Values. The quickest way is to select 'Mark all Unused', then individually select the code values to be marked as used.
- ✂ Where a code list is repeated several times on one segment, such as the DE 235/234 pairs on PO1, LIN and other X12 segments, do not repeat the code list. Enter the code list in the first occurrence on the segment. For all other occurrences of the element on the segment, add a note referring to the code list in the first occurrence. For example, in LIN04, LIN06, etc., the note reads "See code list under LIN02." Then for the occurrences other than the first (LIN02, LIN06, etc.), go into Edit | Code Values, and choose 'Mark All Unused'.
- ✂ Save the standard (regular File – Save)
- ✂ Select File – Export to export the to the .sef filename per EIDX GSS naming conventions

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

To find codes by doing a text search

Some code lists are very long, and scrolling through them to find what you are looking for can be tedious. Fortunately, you can do a text search in EDISIM Standards Editor.

- ~~✍~~ To find a transaction or message who's name contains a word or string, open the standard itself (not your individual transaction, and place the cursor on the bar at the top of the transaction section.
- ~~✍~~ If you want to find a segment that contains a word, you can search the segments in your transaction by placing the cursor on the bar at the top of the transaction section.
- ~~✍~~ If you want to find any segment in the standard that contains a word, you can do this with your current transaction by selecting "Dictionary Segments" in the transaction section, then placing the cursor on the bar at the top of the transaction section.
- ~~✍~~ Place your cursor in the area where you want to search (see table below). For example, if you want to find a segment that contains a word, put the cursor on the bar for the segment section; if you want to find a code that contains a word, highlight a the appropriate segment and element, the put the cursor on the bar for the code section.
- ~~✍~~ Make sure you have View Un-Used selected
- ~~✍~~ Use Edit | Find to find the word or string you are looking for.

To find word or string in:	Do this:
Any transaction/message in the standard	Open the standard itself (not your individual transaction/message, and place the cursor on the bar at the top of the transaction section.
Any segment in the standard	In the standard or in your transaction, select "Dictionary Segments" in the transaction section, then placing the cursor on the bar at the top of the segments section
Just the segments in your transaction/message	In your transaction/message, place the cursor on the bar at the top of the segments section.
Any element in the standard	In the standard or in your transaction, select "Dictionary Segments" in the transaction section, then "Dictionary Elements" in the segments section, then placing the cursor on the bar at the top of the elements section
Just the elements in your transaction/message	Can only be done segment by segment. Select the segment, and place the cursor in the bar at the top of the elements section.
Any code in the standard or any element in your transaction/message.	Can only be done element by element. Select an element containing the code list. Place the cursor in the bar at the top of the codes section.

Adding Codes

Codes may be added when a published code list external to the standards is being used (such as ISO codes in EDIFACT messages), but the code list itself is not in EDISIM.

- ~~✍~~ Select the element to which you want to add the codes
- ~~✍~~ Select Edit - Code Values
- ~~✍~~ At the bottom of the dialog box, input the New Code and Definition then on the right, select Add. Add as many codes as needed. When done adding codes, select OK.
- ~~✍~~ To delete a code you have added, select it and hit Delete.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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Adding 'XXX' segment groups to EDIFACT guidelines

'XXX' segments are "dummy" segments added in order to document Segment Group attributes and descriptions. This is necessitated by the fact that the FORESIGHT EDISIM product does not produce the Segment Group information in the output from Document Builder.

Get reference material:

- ~~///~~ It will be helpful to have a copy of the message structure showing the segment group attributes and descriptions. This can be obtained from the UN/ECE web site at <http://www.unece.org/trade/untdid/>.
- ~~///~~ On the left hand side of the UN/ECE web site, select the standard version (e.g. D.97A)
- ~~///~~ Next, select "Message types by code"
- ~~///~~ Next, on the right-hand side, select the message you are working on, e.g. ORDERS.
- ~~///~~ Next, select MESSAGE DEFINITION. You will now see the segment structure and segment group descriptions. You can cut and paste segment group descriptions from here.
- ~~///~~ Hint: Instead of selecting MESSAGE DEFINITION, right click on it, and save the file (Save Link As), so that you can access it without being on-line or in your web browser. Even though the file is saved as a .htm file, you can still open it in MS Word, and cut and paste text from it. If you have Word 97, you can save the .htm file as a .doc file.

First, add the 'XXX' segment to the dictionary:

- ~~///~~ In Standards Editor, select the guideline you want to work on (if you do not already have it open).
- ~~///~~ Place the cursor on the Dictionary Segments bar and click on it.
- ~~///~~ Then place the cursor on Segments bar and click.
- ~~///~~ Go to top of screen and click on Edit, then Create Dictionary Object.
- ~~///~~ Key in the following: ID = "XXX", Name = "Segment Group Header"
- ~~///~~ Press "OK"

Now, add the 'XXX' segments to the guideline:

- ~~///~~ Click on the Transaction Set bar.
- ~~///~~ Make sure the view is set to display unused segments (in View, 'Show Unused Segments' should be check-marked).
- ~~///~~ You don't want to place the 'XXX' segment within the group (causing it to be treated as the start of a loop), so do not position the cursor on the first segment within the group. Position cursor on the line that starts the group (e.g. the one that says "GROUP 1 STARTS").
- ~~///~~ Choose Edit – Insert Object and select the 'XXX' segment you created.
- ~~///~~ Type in the Group Number after "Segment Group Header" so that it reads "Segment Group Header Group n" where "n" is the group number.
- ~~///~~ The description is part of the standards , so add the segment description in the "Purpose" box (not as EIDX notes).
- ~~///~~ Update the Requirements Designator and Max Use to reflect the attributes of the Segment Group (not the attributes of the first segment in the group).
- ~~///~~ The results won't be perfect, because each 'XXX' segment will have the segment group number of the previous group in the file output from Document Builder. There will be some editing necessary when the file is brought into MS-Word.

ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX) GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK

REDEVELOPING A GUIDELINE IN THE CURRENT VERSION

Redevelopment may be a revision to an existing guideline in its current version (e.g. taking an X12 4010 guideline and redeveloping it in version 4010), or it may also involve an upgrade to a new version (e.g. taking an X12 3020 guideline and redeveloping it in version 4010).

To import an existing SEF file

- ~~///~~ Go into Standards Editor
- ~~///~~ Select File – Import
- ~~///~~ Select the file.

When redeveloping in the current version:

- ~~///~~ Import the existing SEF file
- ~~///~~ For each section (segment, element, code) in EDISIM, make sure 'View Un-used' is checked, so you can see all available segments, elements and codes during the redevelopment.
- ~~///~~ Procedures for marking segments, elements and codes are just as for creating a new guideline.

RESOLVING EXCEPTIONS IN A VERSION MIGRATION

Judgement and common sense are needed when evaluating changes between the old guideline and the 4010 guideline. An 'exception' is a change that cannot be resolved intuitively - it is something that requires further review. A decision will need to be made as to how to resolve the exception. The following usually do not require further review and resolution:

The following may or may not require further review and resolution:

- ~~///~~ Moving a note from 'Comment' area to 'Semantic Note' area
- ~~///~~ Revisions to purposes or descriptions that clarify the use of a transaction, segment, element or code
- ~~///~~ Minor changes to segment or element names, e.g. changing "Reference Numbers" to "Reference Identification"
- ~~///~~ Increasing the Max Length of an element
- ~~///~~ Changing requirements designator of DE 235 Product/Service ID Qualifier from 'O' (Optional) to 'X'

Initial Identification of Exceptions

- ~~///~~ If a segment, element or code is 'Used' in the old guideline and does not exist in the new version of the standard, this is an exception that will have to be resolved (see *Resolving Exceptions* in this procedure). If there is an obvious replacement segment (such as SAC for ITA), mark it 'Used' in the new guideline.
- ~~///~~ If a segment, element or code exists in the new version of the standard that did not exist in the old version, mark it 'Not Used'. You may have to change this later if it turns out that the segment replaces another segment and resolves one of your exceptions.
- ~~///~~ Now go through and review the new guideline. Do any of the segments or elements marked 'Not Used' have a requirements designator of 'M' (Mandatory)? These are items EIDX has not used in the past and now must use. Mark these as Used. Later when we generate the log of changes in Comparator, these will be flagged as exceptions to be resolved.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
GUIDELINES AND STANDARDS SUBCOMMITTEE HANDBOOK**

Resolving Exceptions

If an obvious replacement segment, element or code has *not* been identified for a segment, element or code that no longer exists in the standard, you need to either identify the correct replacement, or work with a technical advisor on how to resolve the exception. With EDISIM, you should be able to browse the entire standard.

Choices when resolving exceptions:

- ~~///~~ Segments/elements: There may be another segment or element to replace the one EIDX used to use.
- ~~///~~ Codes: The code may be in the same place but with a changed value, or it may have been moved to a code list for another element.
- ~~///~~ If there are several exceptions, has the wrong transaction or message been identified in the business model? Is there another, more appropriate transaction/message? It may be necessary for the task group to put the guidelines development on hold, and refer the business models back to the Strategy Subcommittee for revision.

Building the Guideline Document

The template and its hidden text instructions contain brief instructions that may be all you need to complete the task. Nevertheless ...

1. Generate the raw RTF output from EDISIM using Document Builder.

- ☞ Select File – Open Standard.
- ☞ On Transaction Set Selection, select your guideline. Wait, there's more.
- ☞ Check the profile per the instructions below.
- ☞ Mark 'Export' at the bottom of Transaction Set Selection, then 'OK'. Name the .rtf file per EIDX GSS naming conventions.

To check the Profile:

- ☞ Go into Document Builder
- ☞ Open your transaction or message, and on that menu (top right) select Profile.
- ☞ Leave the headers and footers blank (these will be in the Word template that gets added on later).
- ☞ In Text Options, Segment Indicators:
 - Not Used: Select "Not Used"
 - Recommended: Select "Rec"
 - Must Use: Select "Must Use"
 - Not Recommended: Select "NR"
- ☞ In Text Options, Element Indicators:
 - Not Used: Select "X"
 - Recommended: Select "R"
 - Must Use: Select ">>"
 - Not Recommended: Select "NR"
- ☞ Select all shading options (check mark each box)
- ☞ Select Full Group Name for EDIFACT
- ☞ In Optional Items, checkmark everything, then press OK

2. Change the shading in the RTF file.

Currently, Document Builder generates the shading in the RTF file at 20%, which comes out too dark when the document is printed. Currently, the percent shading cannot be controlled in EDISIM. However, it can be changed in Microsoft Word. 12.5% shading is recommended in Word 97; Word 6.0 can handle 12.5% but you cannot see it as an option in the drop-down box for shading.

- ☞ Create your RTF file from Document Builder.
- ☞ Open Microsoft Word.
- ☞ Word 95/97: Open any file (can't do Tools|Options unless a file is open). Go into Tools|Options, then select the 'General' tab and mark the 'Confirm conversions' option. Now open the RTF file generated from EDISIM Document Builder.
- ☞ Word 6.0: Choose File | Open, turn on the "Confirm Conversions" option in the file box, then choose your file. (You may have to open a file in order to turn on the Confirm conversion option.)
- ☞ When the convert box comes up, select "Text Only" and press OK.
- ☞ The file will come in as source RTF codes.
- ☞ Choose Edit | Replace and change shdng2000 to shdng1250, then choose Replace All.
- ☞ Choose File | Save
- ☞ Choose File | Close
- ☞ Choose File | Open and open RTF file again. In Convert File box, choose RTF and then OK.

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- ~~///~~ Shading should now be 12.5% rather than 20%.
- ~~///~~ You set the level of shading to 10% with the "shdng1250" but could have it use other levels: "shdng2000" is 20% shading, and "shdng1500" is 15% shading, for example. 12.5% shading is recommended in Word 97; Word 6.0 can handle 12.5% but you cannot see it as an option in the drop-down box for shading.
- ~~///~~ When done, if you don't want the "Confirm conversions" to come up every time you open a non-Word97 .doc file, be sure to go back to Tools|Options and unselect it under the 'General' tab.

3. Use the template to build your guideline.

The template, in addition to containing instructions, has all the formatting, including page margin sizes, font sizes, formats for table of contents, headings, etc. It is far easier to use the template than to try to start with a blank Word document.

General:

- ?? Choose File | Open
- ?? Open the template file
- ?? Before going any further, select File – Save As, and save using same filename that will be used for SEF file, e.g. Aps3070x for a version 003070 830. See EIDX filenaming conventions below.
- ?? Open the raw RTF file which contains the EDISIM output (segment table and segment detail).
- ?? MS Word: In Tools-Options, click on the View tab
- ?? Make sure "Hidden Text" is check marked.
- ?? As you go through the template converting it into your transaction/message guideline, remove the hidden text as you complete each instruction. If you have not completed something, leave the hidden text there as a reminder of steps you still need to complete.
- ?? In Tools-Options, click on the Spelling and Grammar tab.
- ?? Make sure "Check spelling as you type" is checked. In this way, Word will underline (squiggly red line) all spelling problems.
- ?? If you notice a spelling error in the front matter, examples or the EIDX notes in the segment detail, correct it. If the spelling error is in the standard itself (in notes and descriptions that weren't input as notes by you), do NOT correct it automatically. Remember that the standard may use terminology or grammar not recognized by the spell check dictionary. This is especially true for EDIFACT messages, where international English is used rather than American English.
- ?? If spelling errors in the segment detail are corrected in the Word document, be sure to update the SEF file as well in EDISIM Standards Editor.

Front Matter:

- ?? In the template, edit the first page with the correct transaction/message name, number, version, etc.
- ?? Edit the page header with the correct/transaction/message name, etc. Note that the template is formatted so that the first page has no header, and the header applies only from page 2 on.
- ?? Edit the page footer with the correct filename and date. . Note that the template is formatted so that the first page has no header, and the header applies only from page 2 on.
- ?? Update the Revision History on page 2.
- ?? Skip the Table of Contents for now - it will be regenerated at the end.
- ?? Under **Functional Definition**, paste in the paragraph that you find under "Introduction" in your raw RTF file. This is the transaction/message definition you see when you double-click the transaction number (e.g. 830) or Message (e.g. DELFOR) in EDISIM. Never change the functional definition as it exists in the standard itself.
- ?? In **Considerations**, you can document any EIDX-specific definition. For example, if the standards functional definition lists several uses, but EIDX only uses some of them, describe that here. Describe anything helpful to the implementor. If a lot of information is needed for the implementor, a full, separate supporting document may be warranted.
- ?? In **Trading Partners**, describe the type of trading partners to which the transaction/message applies. For example, in a Purchase Order, it may be "Any buyer to any seller."

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- ?? In **EIDX Business Models**, list *all* existing business models which mention the transaction or message. Then put an 'X' in the appropriate column for each model to indicate whether this particular guideline addresses the model.
- ?? Leave clauses 5, 6, and 7 alone.
- ?? In **Additional References**, list related publications that the implementor may need to refer to, including the business models supporting documents, guidelines supporting documents, references to external code lists, etc. See the template for examples.
- ?? In **Changes From Version NNNN**, list relevant changes from any previous EIDX guideline for the transaction/message. See the template for examples.
- ?? In **Issues Log**, reference it if it exists.

Segment Table

- ?? Delete the sample tables under "List of Used and Not Used Segments" and " List of Used Segments" in the template.
- ?? Copy the segment table in the raw RTF file (from "Heading" to the last transaction set/message note).
- ?? Paste into the template under " List of Used and Not Used Segments".
- ?? Paste again under " List of Used Segments".
- ?? For the table under "List of Used Segments", delete the rows for all the segments marked 'Not Used'.

Segment Detail

- ?? Delete sample segment detail from the template
- ?? Copy the segment detail from the raw RTF, from the ST Segment or UNH segment to the SE segment or UNT segment.
- ?? Paste segment detail into the template.
- ?? Starting with the first segment (ST or UNH), place the cursor anywhere in the top line (the one that says " Segment: **ST** Transaction Set Header" for example).
- ?? The "Style" box in MS Word is usually a rectangle that has the word "Normal" in it. That's because most of your text is "normal" style. For the segment heading (where you just placed your cursor), click the arrow on the Style box and select "Heading 2". This will cause the segment heading to be included in the table of contents.
- ?? Repeat for all segments.

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Examples

There are examples of examples in the template.

Example description and summary:

- ?? Give the example a name
- ?? Write a short explanation of the scenario or description of the business model the example illustrates
- ?? Delete the sample in the template (or empty out the contents of the table so you can type in your data.
- ?? Under Example Summary, create the "User Friendly" example. Develop example segments, and for each segment, describe what that segment says in friendly terms.

Example explanation:

- ?? Delete the sample in the template
- ?? Open the master examples template (e.g. Xexfrmtv.doc). You will see that the template contains all the segments EIDX uses (or all that we knew about when we created it).
- ?? In the master examples template, find the first segment you need for your example. Highlight it and copy it (CTRL-Insert or Edit-Copy)
- ?? Paste the segment into your guideline template.
- ?? Notice that the left-hand column is blank, and that there's nothing after the colons on the right.
- ?? On the left, type in your segment (or cut and paste from your summary).
- ?? On the right, type the data next to the corresponding element, and add any illumination, such as the meaning of a code.
- ?? Delete any data elements not being used.
- ?? Continue to copy and paste segments from the master examples template, typing or pasting in segments and illumination until you have all your segments.
- ?? From the master examples template, copy and paste the rows that say "Header Section", "Detail Section" and "Summary Section" in the appropriate positions in the table.
- ?? For a particularly complex transaction, you may also want to add rows for the beginning of each line item or whatever. For example, a complex 856 (Ship Notice) example might contain rows for the start of each HL loop, and for the start of each LIN (Line Item) loop within each HL.

Table of Contents

The final step after building your document is to generate the Table of Contents. If you have used the template, and followed the instructions for the segment detail, all the topics which need to be in the Table of Contents will have the correct paragraph style applied.

Method 1:

- ?? Go to the page containing the contents, and click anywhere inside the current contents.
- ?? Right-click to get the shortcut menu.
- ?? On the shortcut menu, select Update Fields.

Method 2:

- ?? Go to the page containing the contents, and click anywhere inside the current contents.
- ?? Select Insert | Index and Tables
- ?? Select the tab that says Table of Contents.
- ?? Choose From Template, the OK

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Transaction Set or Message Guideline: File Naming Conventions and File Management

FILENAMING CONVENTION

X12 Transaction Guidelines

Bytes	Description		
<i>1</i>	<i>Standards Type</i>		
	A	ASC X12	
	R	Response (use for the response document when more than one X12 transaction has the same functional ID).	
<i>2-3</i>	<i>2 character document type description - use Functional ID</i>		
	Code	Stands for	X12 Txn
	ca	Change Order Ack	865
	po	Purchase Order, Basic	850
	pr	PO Ack (Response)	855
	ps	Planning Schedule, Response to Forecast	830, "830R"
	rc	Receipt Advice	861
	rs	Request for Order Status, Order Status Report	869, 870
	sh	Ship Notice (ASN)	856
	ss	Shipping Schedule	862
<i>4-7</i>	<i>Transaction / Message Version</i>		
	2002	X12 002002	
	4010	X12 004010	
<i>Last</i>	<i>Special Notation</i>		
	e	Examples (if developed separately, to be attached to final .DOC file)	
	i	Issues Log	
	p	Pictures (JPEG, GIF, BMP, other graphics files)	
	r	"Raw" output. Use for RTF file output from EDISIM Document Builder.	
	v	For MS-Word files: EIDX Word 6.0/96 Version ; use with "final" versions of files.	
	x	For non MS-Word files: EIDX Version ; use with "final" versions of files. For MS-Word files: EIDX Word 97 Version ; use with "final" versions of files.	

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Examples:

Ars4010x.sef	SEF file for 869 exported from EDISIM Standards Editor.
Ars4010r.rtf	“Raw” Rich Text Format (RTF) file for 869 exported from EDISIM Document Builder.
Ars4010e.doc	Examples for version 004010 869
Ars4010v.doc	Final Document, version 004010 869, created by pulling together content of ars4010t.doc, ars4010r.rtf, and ars4010e.doc., in MS Word 6.0/95
Ars4010v.rtf	Same as Ars4010x.doc, in RTF format.
Ars4010x.doc	Same as Ars4010v.doc., in MS Word 97 format.
Ars4010i.doc	Issues log for version 004010 869

Rrs4010x.sef	SEF file for 870 exported from EDISIM Standards Editor.
Rrs4010r.rtf	“Raw” Rich Text Format (RTF) file for 870 exported from EDISIM Document Builder.
Rrs4010e.doc	Examples for version 004010 870
Rrs4010v.doc	Final Document, version 004010 870, created by pulling together content of Rrs4010t.doc, Rrs4010r.rtf, and Rrs4010e.doc., in MS Word 6.0/95
Rrs4010v.rtf	Same as Rrs4010x.doc, in RTF format.
Rrs4010x.doc	Same as Rrs4010v.doc., in MS Word 97 format.
Rrs4010i.doc	Issues log for version 004010 870

Unconverted X12 guidelines - *.html files (already on the Web)

Bytes	Description	
<i>1-4</i>	<i>Standards Version</i>	
	2002	X12 002002
	3020	X12 003020
<i>5-7</i>	<i>Transaction / Message ID</i>	
	850	X12 Purchase Order
	865	X12 Change Order Acknowledgment
<i>Last</i>	<i>Not Used</i>	

Example:

3020850.html	HTML file. Contains only segment table and segment detail.
--------------	--

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EDIFACT Message Guidelines

Contact the GSS Chair for assignment of the four character identifier for new EDIFACT message guidelines

Bytes	Description		
<i>1</i>	<i>Standards Type</i>		
	E	EDIFACT	
<i>1-4</i>	<i>4 character document type description</i>		
	Code	Stands for	UN Msg
	ccar	Customs Cargo Report	CUSCAR
	cdec	Customs Declaration	CUSDEC
	cred	Credit Advice	CREADV
	cres	Customs Response	CUSRES
	ctrl	Control Message	CONTRL
	debt	Debit Advice	DEBADV
	delf	Delivery Forecast	DELFOR
	delj	Delivery Just In Time	DELJIT
	desp	Despatch Advice	DESADV
	iman	Arrival Notice	IFTMAN
	imin	Instructional Message	IFTMIN
	invc	Invoice	INVOIC
	invr	Inventory Report	INVRPT
	ista	International Multimodal Status Report	IFTSTA
	ochg	Purchase Order Change	ORDCHG
	ords	Purchase Order	ORDERS
	orsp	PO Ack (Response)	ORDRSP
	payr	Payment Order	PAYORD
	pric	Price Catalog	PRICAT
	qual	Quality Data	QUALITY
	quot	Quote Message	QUOTES
	recd	Receipt Advice	RECADV
	rfqt	Request for Quote	REQOTE
	rmit	Remittance Advice	REMADV
	slsr	Sales Report	SLSRPT
	spec	Specification Data	QLSPEC
<i>5-7</i>	<i>Transaction / Message Version</i>		
	921	UN EDIFACT 92.1	
	95b	UN EDIFACT D.96B	
<i>Last</i>	<i>Special Notation</i>		
	e	Examples (to be attached to .DOC file)	
	i	Issues Log	
	j	Joint Industry Version	
	t	Templates (front matter for .DOC file)	
	x	EIDX Version	

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Examples:

Cdec921x.sef	SEF file exported from EDISIM Standards Editor.
Cdec921x.dpf	EDISIM Document Builder Profile File
Cdec921r.rtf	“Raw” Rich Text Format (RTF) file exported from EDISIM Document Builder.
Cdec921e.doc	Examples for version 003020 850
Cdec921t.doc	Template containing front matter for 003020 850
Cdec921x.doc	Final Document, version 003020 850, created by pulling together content of apo3020t.doc, apo3020r.rtf, and apo3020e.doc.
Cdec921x.rtf	RTF
Cdec921x.html	HTML version of final document
Cdec921i.doc	Issues log for version 003020 850

FILE LOCATIONS

MS-Word file (*.doc)	Kept by GSS chair; redundant copy kept by secretariat. Not available via web.
HTML Files	Kept in public area of EIDX website (www.eidx.org/guidelines/ _____)
“Raw” RTF file	Kept in members area, www.eidx.org/ _____.
SEF file	Kept by GSS chair; redundant copy kept by secretariat. Not available via web.

Section 6 – Balloting Process

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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GSS Ballot and Review Checklist
--

Task Group: _____

Leader: _____

	Ballot and Review Task	Date Started	Date Ended	Performed by:
1	GSS Chairperson prepares materials for ballot.			
2	Voting ballots are distributed by EIDX Secretariat			
3	Ballots are returned and copies of ballots and comments sent to task Leader and GSS Chairperson			
4	Ballots are reviewed, summarized, and comments addressed before the next conference. Changes made to documents as needed.			
5	Present ballot summary and discussion at the next EIDX conference. Take a vote on the final adaptation of the document(s). Rework document(s) if needed. Re-ballot if needed.			

Ballot and Ballot Review Steps

SUMMARY: BALLOT TIMELINE:

- ?? Allow 2-5 days for materials to reach GSS Chairperson
- ?? Allow 2-5 days for GSS Chairperson to review materials and ensures that everything is in order
- ?? Allow 2-5 days for materials to reach EIDX Secretariat
- ?? Allow 3-5 days for EIDX Secretariat to prepare balloting forms and copies of ballot material prepared and mailed
- ?? Voters must have 30 days to evaluate and return ballots
- ?? EIDX Secretariat needs to certify that ballot returns are from members in good standing; this activity runs concurrently with the balloting period
- ?? Allow 2-5 days for the EIDX Secretariat needs to compile results, send copies of all results and comments to task group leader, and send summary results to GSS Chairperson
- ?? Allow 1-2 weeks for task group Leader to review results and prepare responses and/or materials for ballot review session.

1. BALLOT PREPARATION and SUBMISSION

The EIDX GSS Chairperson will prepare new documents for a membership ballot. Minor changes to an existing document, such as recommending the use of a new code to the data element code list do not require a ballot. The GSS Chairperson determines if a ballot is necessary. If a ballot is necessary, the GSS Chairperson will prepare new documents for membership ballot and submit them to the EIDX Secretariat.

2. DOCUMENTS DISTRIBUTED FOR MEMBERSHIP BALLOT

The EIDX GSS Chairperson will have new documents distributed for a membership ballot. The ballots will be returned to the EIDX Secretariat.

Minor changes to an existing document, such as recommending the use of a new code to the data element code list do not require a ballot. The GSS Chairperson determines if a ballot is necessary.

Definition: 'Voting Member' is the official voting representative from each member company. Proxy Voting Members are not acceptable for the guideline ballots.

3. BALLOTS ARE RETURNED

EIDX voting members return their ballots and comments to the Secretariat by the designated date. The Secretariat logs the ballot responses and makes copies of the ballots and comments for their file. The membership quorum is defined in the association by-laws. A quorum of ballots must be returned to validate the vote. If a quorum is not returned, ballot returns will be solicited from the membership again until a quorum is obtained.

The EIDX Secretariat mails copies of the ballots and comments to the Task Group Leader for their review before the next conference. A summary of ballot results is sent to the GSS Chairperson.

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4. BALLOT REVIEW BEFORE THE CONFERENCE

The Task Group Leader will inform the Task Group of the ballot results. The Task Group Leader and the Task Group will review and summarize the ballots before the next EIDX conference, and propose resolutions.

Members who make ballot comments or disapprovals should attend the ballot review session, but may not be able to due to circumstances out of their control. If possible, present the proposed resolution to the member who made the comment before the conference and give them a chance to respond.

Every comment submitted in the ballots must be presented at the ballot review meeting. The task group will recommend whether comments or recommendation in the ballot should be incorporated into the final document. The format of the presentation is the presenter's choice.

Substantial recommendation changes or majority ballot rejects may require more work in the document and a new ballot.

At least a number of ballots need to be returned that exceed the membership quorum. The number for quorum varies from quarter to quarter. EIA needs to notify chairpersons how many ballot returns are required to achieve quorum in a given quarter.

- ~~///~~ If a ballot quorum is not returned by the due date, voting members shall be called by the task group Leader to solicit their ballot.
- ~~///~~ If a ballot quorum is not returned before the conference, ballots may be solicited at the conference.
- ~~///~~ If a ballot quorum is not obtained at the conference, the ballot will be mailed again to the voting members.

5. DETAILED BALLOT REVIEW AT THE BALLOT REVIEW MEETING

If all ballots returned are approvals with no comments, a ballot review does not need to be conducted. If there are any comments or disapprovals, a ballot review is mandatory. The following should be done at the ballot review meeting:

- ~~///~~ Review the ballot comments.
- ~~///~~ If there are comments, the task group analyzes the comments and reaches a consensus on the resolution of the comments.
- ~~///~~ If there were no disapprovals and there was a consensus vote (over 2/3 of the returned ballots were favorable), then the draft guideline is approved and ready for publication.
- ~~///~~ If there was a disapproval, and the member casting the disapproval accepts the resolution of the comments, then the draft guideline is approved and ready for publication.
- ~~///~~ If it is determined that the guideline is disapproved or should be reworked, the GSS chair will confer with the member casting the disapproval, and if there is still no resolution, will determine if it is necessary for the balloting process to be repeated.
- ~~///~~ Once approved, the document is finalized and submitted to the GSS Chairperson for publication.

Appendices

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
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Appendix A: Supporting Documentation Contents

	SUPPORTING DOCUMENT ENTITY	NOTE
1.	Title Page	See "Formatting and Notation" below.
2.	Table of Contents	Include all section titles, topics and subtopics.
3a.	Purpose	Purpose of this document.
3b.	Additional References	If the supporting document applies to one or more specific business models, include references to those business models. Include references to related supporting documents. Include references to transaction or message implementation guidelines.
3c.	Standards Version	Identify which version of X12 and UN-EDIFACT standards are used as the base and note that the user may need to adapt this information when applying the recommendations to other standards versions.
3d.	Terminology	Discuss any use of terms that is particular to this supporting document and will help the user interpret the remainder of the document.
3e.	Abbreviations	Include a table of abbreviations used throughout the document.
4.	Sections	Do whatever makes sense for the topic at hand. Look at existing supporting documents to get an idea of how to group topics into sections. In general, follow this type of ordering: Section 1 – General Recommendations that are not specific to a particular transaction/message. Section 2 – Recommendations particular to the first transaction/message the document addresses. Section 3 – Recommendations particular to the second transaction/message the document addresses. If a section is dealing with a particular transaction/message, presentation should be in the same order that the segments/elements appear in the transaction/message.
5.	Appendices	Appendices may or may not be needed, depending on the topic.
6.	Issues Log	A separate Issues Log should be maintained, using the same format as Strategy Task Group Issues Logs. Items for issues log include any items that are out of scope, that need to be referred back to STR or another GSS task group, changes needed to business models, changes needed to transaction or message guidelines as result of recommendations in this document, etc.

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	DOCUMENT ENTITY	FORMAT OR NOTE
		Times New Roman, 10 point
	Margins	
	Top	0.75 in.
	Bottom	0.5 in.
	Left	1.0 in.
	Right	1.0 in.
	From Edge – Header	0.3 in.
	From Edge – Footer	0.3 in.
2.	General Recommendations to support conversion of .doc file to .html for web publication.	
	Extraneous tabs and spaces create unexpected results when converted to html.	Set your view options so that you view tab characters and paragraph marks as you work, so that you can see where these are in the file. Get rid of extraneous spaces. Like if you see a paragraph mark in the middle of a "blank" line.
	Every paragraph mark causes 1 line in the .doc file to take up 3 lines in the .html file (a blank line before, your "paragraph" and a line after. This applies to the MS-Word .doc to .html filter.	DO NOT USE CARRIAGE RETURN (PARAGRAPH MARK) unless you absolutely need to. If you need to force a line feed that is WITHIN your current "paragraph", use "Shift-Return" to create a line feed. This includes inside tables.
	Text is not going to be justified when it's converted to html, so if you've got justified text in your .doc file, there may be unexpected results. It may not look like what you expected.	Don't use justification across the line to make nice square paragraphs. Left, Center, and Right work, though.
	If you use nice tabs and spaces to create something that <i>*looks*</i> like a table, but <i>*isn't*</i> a table, it won't look like a table when converted to html.	Use tables generously. Get to know your "Merge Cells" and "Split Cells" functions, too. They are your friends. On all tables, use inside and outside borders instead of spaces to separate rows.
	If there's a paragraph mark in between paragraphs, and that paragraph mark is set as BOLD or ITALIC , even though the paragraphs below are not BOLD nor ITALIC , some of them will turn out bold or italic when you view the html file in the web browser. This is a bug.	Make sure all the paragraph marks in between paragraphs are set to the normal, non-bold, non-italic style. Only stuff that's really supposed to be bold or italic should be marked bold or italic.
	When two pictures or objects are placed on the same page, they overlap each other in the Word 6.0/95 file.	In the Word 97, change the Wrapping in Format Object to None. This is because that's how the objects will be formatted in the conversion to Word 6.0/95. You'll need to add spacing (paragraph marks) in your Word 97 file accordingly so that text and objects/pictures do not overlap.
	When the file is converted from Word 97 to Word 6.0/95 or vice-versa, the Table of Contents in the converted file has the same page number (Page 2, Page 3, whatever) on every line.	The conversion from Word 97 to 6.0/95 and vice-versa doesn't always carry over the automated table of contents. You will have to redo the Table of Contents in the new file.

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	DOCUMENT ENTITY	FORMAT OR NOTE
5.	Section Title Page	Format section head as Heading 1; add additional formatting to paragraph: space before, 150 pt
6.	Topics	Topic is in a one-cell table across the top of the page, and is formatted as Heading 2. Topic goes only on top of first page of the topic; add additional formatting to table: border outside, 2.25 pt
7.	Subtopics	Subtopics go wherever appropriate and are formatted as Heading 3.

ASC X12 NOTATION

NOTATION	EXAMPLE	MEANING	DESCRIPTION
<i>Segment</i>			
Segment Tag	BEG	BEG Segment	Segment Tag (TAG) in first three positions of segment.
<i>Loop</i>			
TAG loop	PO1 loop	The group of segments in the loop that begins with the PO1 sement.	Loop named after the first segment in the loop.
<i>Element</i>			
DEnnnn	DE1082	Data Element 1082	Data Element nnnn where nnnn is the Data Element Number. Use when referring to a data element, without specific reference to segment.
Cnnn	C003	Composite Element C003	Composite Data Element Cnnn where nnn is the Composite Data Element Number. Use when referring to a composite data element, without specific reference to segment.
<i>Element within Composite</i>			
Cnnn-nn	C003-3	3 rd data element in Compsite Element C003	Compsite element and nn, where nn is the position of the data element within the composite.
<i>Segment within Loop</i>			
TAG.TAG	LIN.REF	REF segment in LIN loop	Segment Tag of first Segment in Loop and Segment Tag of the segment being referenced.
<i>Element within Segment</i>			
TAGnn	SCH06	6 th data element in the SCH segment	Segment tag and -nn, where nn is the position of the data element within the segment.

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EDIFACT NOTATION

NOTATION	EXAMPLE	MEANING	X12 Style	DESCRIPTION
<i>Segment</i>				
Segment Tag	BGM	BGM Segment	BGM	Segment Tag (TAG) in first three positions of segment.
<i>Segment Group</i>				
SGnn	SG9	Segment Group 9	SG9	Segment Group nn where nn is the Segment Group Number.
<i>Element</i>				
DEnnnn	DE1082	Data Element 1082	DE1082	Data Element nnnn where nnnn is the Data Element Number. Use when referring to a data element, without specific reference to segment.
Cnnn	C212	Composite Element C212	C212	Composite Data Element Cnnn where nnn is the Composite Data Element Number. Use when referring to a composite data element, without specific reference to segment.
<i>Element within Composite</i>				
Cnnn:nnnn	C212:7143	Data Element 1083	DE 7143	Data Element nnnn where nnnn is the Data Element Number. Use when referring to a data element, without specific reference to segment.
<i>Segment within Segment Group</i>				
SGnn.TAG	SG9.LIN	LIN segment within SG9	SG9.LIN	Segment Group and Segment Tag.
<i>Element within Segment</i>				
TAG/DEnnnn	BGM/1004 or BGM.1004 BGM/C202 or BGM.C202	DE 1004 within BGM Segment C202 within BGM segment	BGM02 BGM01	Segment tag and data element on that segment which is not part of a composite data element. Add X12 style notation in parentheses if this facilitates understanding.
<i>Element within Composite within Segment</i>				
TAG/ Cnnn:nnnn	PIA/ C212:7143 or PIA/ C212:7143	DE 7143 within C212 within PIA segment, any iteration	Depends on which iteration	Segment tag, composite element, and data element. Use if not referring to a particular iteration (where composite appears multiple times on the segment) or where composite appears only once on the segment.
TAG/ Cnnn:nnnn (2)	PIA/ C212:7143 (2) or PIA/ C212:7143 (2)	DE 7143 within second occurrence of C212 on PIA segment.	Depends on position of composite on segment. In this case, PIA03-2.	Segment tag, composite element, and data element. Use where composite appears multiple times on the segment and specific occurrence of the composite is being referenced.

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Putting it all together

International EDIFACT notation takes the form:

- ~~///~~ SEGMENTGROUP.SEGMENT/DATAELEMENT, or
- ~~///~~ COMPOSITEDATAELEMENT/DATAELEMENT

Components are always separated by a delimiter of some kind. In segments where there are a number of iterations of an identical Composite Data Elements, this can be indicated by a number that appears after the DE used. If using only the first occurrence of the Composite, just omit the number.

International EDIFACT notation may be hard to get used to for those who are used to X12 notation. In EIDX documents, X12 style notation may be put in parentheses after the international notation to facilitate understanding.

Examples of notation:

- ~~///~~ SG9.LIN/1082
which means: Segment group 9 LIN, Data Element 1082
- ~~///~~ SG9.PIA/C212:7143
which means: Segment group 9 PIA, Composite C212, Data Element 7143, any iteration
- ~~///~~ SG9.PIA/C212:7143(2)
which means: Segment group 9 PIA, Composite C212, Data Element 7143, second iteration

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Appendix C: Transaction Set or Message Guideline: Content

The template and its hidden text instructions should have all the information you need to build the content of the guideline. This information is documented in case we lose the template and have to rebuild from scratch.

	GUIDELINE ENTITY	FORMAT OR NOTE
1.	Title Page and 2 nd page Secretariat Reference	See "Formatting and Notation" below.
2.	Table of Contents	Include all topics, subtopics, segment tables and segments.
	<i>In general, the material in "Introduction" through "Field of Application" will be specific to a transaction or message, and will need to be reviewed and modified from the template.</i>	
3.	Introduction	Includes the following subtopics (see template): Functional Definition of Transaction/Message Considerations Trading Partners (define) EIDX Business Models (which apply) Field of Application Format (syntax notes about ASC X12 or EDIFACT)
	Functional Definition	Functional definition from ASC X12 or UN-EDIFACT plus any additional EIDX-specific definition.
	Considerations	Considerations if they fit here, or else reference to separate Supporting Document.
	Trading Partners	Define what types of trading partners use this transaction/message.
	EIDX Business Models	List of which business models are discussed in this transaction/message. See also "Additional References" below.
	Field of Application	Define whether transaction/message may be applied for national and/or international trade, universal commercial practice or electronics industry practice, etc.
	<i>In general, the material in "Format" and "Attributes" is generic, and you probably don't need to make any modifications to the material in the template.</i>	
	Format	Summary syntax notes about ASC X12 or UN-EDIFACT.
	Attributes	Describe EIDX data element usage
	Additional References	Include references to other documents, including Business Model documents, Supporting Documents, related guidelines.
4.	Segment table <i>including</i> NOT USED groups and segments	This table illustrates which segments are recommended in the EIDX guideline relative to all the segments in the general transaction/message.
		For EDIFACT messages, remove the 'XXX' segments from the segment table, and remove the references to 'XXX' segments in the group start lines. NOTE: Do not remove the 'XXX' segments from the segment detail of the

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	GUIDELINE ENTITY	FORMAT OR NOTE
		document.
5.	Segment table showing USED segments only (<i>excluding</i> NOT USED groups and segments)	This table illustrates only those segments which are recommended in the EIDX guideline. This table is a subset of the entire general transaction/message. Copy the segment table from step 4 (after removing 'XXX' references) and paste it, then remove the 'NOT USED' segments from this second table.
6.	Transaction/Message Guideline Segment Detail.	Each segment, which is marked USED in the segment table, should be included in the guideline. Each data element will be reviewed and its usage will be indicated. Notes may be added at the entire segment or data element level. Entire code lists for each data element should be reviewed to determine if EIDX has a subset list of codes to indicate.
7.	EDIFACT ONLY - XXX "Segments"	EDIFACT guidelines contain a Segment Group header in front of every segment group. The 'XXX' segment is used to generate this Segment Group header. The segment group description and attributes are noted here. See Formatting and Notation below for additional information.
8.	Transaction or Message Example(s).	Carry-over examples from previous versions of the transaction or message; revise if necessary. Add new example(s). See "Formatting and Notation" below.

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Appendix D: Transaction Set or Message Guideline: Formatting and Notation

If you are generating your guideline from the template provided, you should not need to worry about any of the information in this section. This information is documented in case we lose the template and have to rebuild from scratch.

	GUIDELINE ENTITY	FORMAT OR NOTE
1.	Software	
	Segment tables and segments	Generate using Foresight EDISIM, Standards Editor. Obtain EIDX copy of software (temporary license for EIDX development only) from GSS Secretary. See _____. If revising existing guideline, obtain .SEF file from GSS Chair. Use Foresight EDISIM Document Builder to generate .rtf (Rich Text Format) file containing segment tables and segment detail.
	EDISIM Document Builder profile	See procedure below under "Foresight EDISIM Procedures".
	Guideline Document	MS Word, version 6.0 or higher. Recommend using highest version available.
2.	Transaction/Message Version	Transactions or Messages should be developed/re-cast in the latest available version of ASC X12 or UN-EDIFACT.
3.	Styles	
	Title Page – title, top left	1 st line, "An", Times New Roman, 12 pt, Bold, left-justified, bottom border, .25 pt 2 nd line/3 rd line "EIDX/Convention", Times New Roman, 36 pt, bold, left-justified, manual line break between "EIDX" and "Convention" Single blank line, 12 pt 4 th line "For", Times New Roman, 12 pt, bold, left-justified 5 th /6 th /7 th line, "Electronic/Data/Interchange", 20 pt, bold, left-justified, manual line breaks between words 12 manual line breaks, 12 pt, then paragraph (line break)
	Title Page – title, near bottom right	8 th line, "Transaction Set" or "Message", Times New Roman, 12 pt, bold, right-justified, underline 9 th line, Transaction Set ID (e.g. 850) or Message ID (e.g. ORDERS), Times New Roman, 36 pt bold, right-justified 10 th line, name of transaction or message, Times New Roman, 24 pt, bold, right-justified 2 blank lines, 12 pt X12 only: 11 th line, "Functional Group ID=nnn", right justified; "Functional Group=", Times New Roman, 10 pt, bold, "nnn", 20 pt, bold

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	GUIDELINE ENTITY	FORMAT OR NOTE						
		<p>X12 only: 12th/13th/14th lines, Version, Release, Document Month and Year, Times New Roman 12 pt, bold, right-justified, each item separated by manual line breaks.</p> <p>UN only: 11th/12th lines, Version, Document Month and Year, Times New Roman 12 pt, bold, right-justified, Version and Document date separated by manual line breaks</p>						
	2 nd page Secretariat Reference	<p>See template. Bottom left on second page, Times New Roman 10 pt, bold, left-justified. (Note: No 's' in 'Electronic'); EIDX copyright line, spacing before, 500 pt.</p> <p>Electronics Industry Data Exchange Association (EIDX) ? 1998 All rights reserved</p> <p>Secretariat: Electronic Industry Alliance 2500 Wilson Blvd. Arlington, VA 22201-3834 Phone: (703) 907-7539</p>						
	Table of Contents – page title	Times New Roman, 12 pt, Bold, Centered. Set bookmark so that hyperlink "Return to Contents" can be added throughout the document						
	Table of Contents – paragraph style	"Distinctive"						
	"Normal" paragraph	Times New Roman 10 pt						
	Heading 1 paragraph	Times New Roman 14 pt, Bold						
	Heading 2 paragraph	Times New Roman 12 pt, Bold						
	Heading 3 paragraph	Normal + bold, small caps						
	Heading 4 paragraph	Normal + bold, italic						
	<p>HEADER OF EACH PAGE – LEFT, starting on 2nd page: 1st line: "An EIDX Convention For 2nd line: Electronic Data Interchange: Add bottom border to second line.</p>	<p>AN EIDX CONVENTION FOR ELECTRONIC DATA INTERCHANGE</p>						
	<p>HEADER OF EACH PAGE – RIGHT, starting on 2nd page: 1st line: "Version n Release n 2nd line: Transaction/Message Identifier Add bottom border to second line</p>	<p align="right">VERSION 003 RELEASE 050 840 REQUEST FOR QUOTE</p> <p align="right">VERSION 92.1 DELJIT JUST IN TIME</p>						
	<p>FOOTER OF EACH PAGE, starting on 2nd page: Left: Document Identifier, Center: Page Number Right: Publication Date</p>	<table border="0"> <tr> <td>Arq3050x.doc</td> <td>PAGE n</td> <td>March 1996</td> </tr> <tr> <td>Delj921x.doc</td> <td>PAGE n</td> <td>March 1996</td> </tr> </table>	Arq3050x.doc	PAGE n	March 1996	Delj921x.doc	PAGE n	March 1996
Arq3050x.doc	PAGE n	March 1996						
Delj921x.doc	PAGE n	March 1996						
	UNDERLINE:	Use of underlining is not recommended.						
	SHADING:	All EIDX-specific comments and notes.						
	Margins							
	Top	0.75 in.						
	Bottom	0.5 in.						
	Left	1.0 in.						
	Right	1.0 in.						

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	GUIDELINE ENTITY	FORMAT OR NOTE
	From Edge – Header	0.3 in.
	From Edge – Footer	0.3 in.
4.	General Recommendations to support conversion of .doc file to .html for web publication	See recommendations above for Supporting Documentation.
5.	Specify group, segment and element usage	Usage terms defined below in “Usage Terms”.
	Group Usage (EDIFACT)	Specify the usage on the dummy “XXX” segment preceding the segment group. If the segment group is NOT USED, mark segments in the group NOT USED.
	Loop Usage (X12)	Mark all segments in the loop. If the loop is not used, mark all segments in the loop NOT USED.
	Segment Usage	The transaction table in a specific guideline indicates that a segment is USED or NOT USED. Foresight EDISIM allows the SEGMENT to be marked NOT USED or MUST USE in the left column. A Note should be added on each SEGMENT on its detail page to indicate that the segment is marked ‘EIDX USAGE: Required, Advised, or Optional’.
	1 st segment in loop or segment group	The first segment in each segment group must be shown as Mandatory in the table.
	Element Usage	Each optional or conditional (per the standards) data element which is on a segment detail page in the EIDX guideline should be marked ‘EIDX USAGE: Required, Advised, Depending or Optional’. See definitions below under “Usage Terms.” Optional may be indicated by no mark or comment. It is not necessary to mark mandatory data elements. FORESIGHT allows the SEGMENT or COMPOSITE to be marked NOT USED or MUST USE in the left column.
6.	Transaction or Message Example(s) - left column	Write sample segments with data element delimiters and segment delimiters in the right column as they would look in a transmitted transaction.
	Transaction or Message Example(s) - right column.	Write simple interpretation of segment. See template or existing guideline.
7.	All date formats must be consistent	See Supporting Document “Implementation Recommendations for Product and Other IDs”.

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Appendix E: Transaction Set or Message Guideline: Usage Terms

Segment and Segment Group Usage

EIDX segment and segment group usage appears in the left-hand column of the segment table and in the header or segment level note of the segment detail.

See also "Foresight EDISIM Procedures" below.

SEGMENT TABLE	SEGMENT HEADER	SEGMENT NOTE	MEANING
MUST USE	Mandatory	N/A	If a segment is mandatory according to the standard, EIDX cannot change the mandatory status on that component.
NOT USED	N/A	N/A	EIDX has determined no value in supplying the segment; hence, it need not be generated. The segment will not appear in the segment detail..
Blank	Optional or Conditional	REQUIRED	EIDX members agree that the data concerned must be sent.
Blank	Optional or Conditional	No note	Used segments will not have an special indication in the segment table or segment detail. This indicates that EIDX makes no recommendation regarding usage. The trading partners must agree on usage.

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Element Usage

EIDX element usage appears in the left-hand margin of the segment detail and in the attributes or data element (DE) level note of the segment detail. See "Foresight EDISIM Procedures" below.

MARGIN	ATTRIBUTE	DE NOTE	MEANING
>>	M (Mandatory)	N/A	If a segment, composite, or stand alone data element is mandatory according to the standard, EIDX cannot change the mandatory status on that component. <i>DATA ELEMENT within a COMPOSITE:</i> A data element within a composite is mandatory only if the composite is used.
X	C or X (Conditional) or O (Optional)	No note or NOT USED	EIDX has determined no value in supplying the composite or data element; hence, it need not be generated.
Blank	C or X (Conditional) or O (Optional)	REQUIRED	EIDX members agree that the data concerned must be sent.
Blank	C or X (Conditional) or O (Optional)	No note	Indicates that EIDX makes no recommendation regarding usage. The trading partners must agree on usage.
Blank	C or X (Conditional) or O (Optional)	ADVISED	EIDX has determined value in supplying the data element; hence, it should be generated.
Blank	C or X (Conditional) or O (Optional)	DEPENDING	Data must be sent if a particular defined condition or set of conditions exist. The associated conditions must be explained at the appropriate level of detail.

Appendix F: Standards on the Web

TO FIND EDIFACT SYNTAX RULES

- ☞ Go to <http://www.unece.org/trade/untdid/>
- ☞ Then on the left select:
 - PART 4
 - United Nations rules for Electronic Data
 - Interchange for Administration, Commerce and Transport
- ☞ Then on the right select:
 - 2.2 UN/EDIFACT syntax rules (ISO 9735-latest version)

Appendix G: Other Helpful Information

TO SEARCH FOR TEXT STRING IN AN ADOBE ACROBAT PDF FILE

- ?? Download the file from your web browser
- ?? Open the PDF file in Adobe Acrobat Reader
- ?? Under the drop down menu item titled "TOOLS" you can click on "Find". "Find" will allow you to search for specific entities or a text string.