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For UnForm 7.1.03 and above

INFOR / SXe INTEGRATION: eDeliver, eArchive

readme document Contents

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It may go without saying, but, if you are NOT planning on using one or another of eDeliver or eArchive, or are deferring implementation to a later time, skip the sections containing the title of the one you are not concerned with.

1 Requirements

- UnForm version 7.1.03 or higher
- your SXe enhancement rule file (if custom), or use the current standard one included in zip file.
- eDeliver_sxe*.rul – Included in zip file. Pre-configured parallel rule-file(s).
- eDeliverEngine_sdsi*.rul – Included in zip file. Contains the “engine” to process eDeliver functions.
- eArchive_sxe*.rul - Included in zip file. Pre-configured parallel rule file for archiving.
- other requirements which may apply are mentioned in the applicable sections of this document.

2a eDeliver ... Functionality Overview

- **Fax, Email and/or selectively Print laser copies** of documents using one of four methods of passing data to UnForm, including recipient address/phone, copy number(s) and other pertinent form data.
- The **eDeliver_sxe*.rul** file which enables this has been **preconfigured by SDSI** with standard settings, requiring a minimum of integrator setup work to implement, if method 3 (described below) is used as the retrieval method. Even using other retrieval methods, the amount of integrator work necessary to implement e-Delivery can be significantly reduced using these rule-sets.

2b eArchive ... Functionality Overview

- **Store archival copies of documents** in UnForm's Document Archiving and Management system, optionally place barcodes on documents for later scanning using the UnForm Image Manager tool. Features in the UnForm system provide for **retrieval via browser interface**, including rich drill-down and search capabilities for fast access of archived documents.
- The **eArchive_sxe*.rul** file which enables this has been **preconfigured by SDSI** with standard archive system settings and properties. Use of these features requires the separate purchase of a license for the archiving component if not already included in the license.

3 Help Resources

In addition to the configuration help and other info in this document:

- <http://unform.com> - **NewsPages Article about eDeliver eArchive Rule-Sets**,

see: http://synergetic-data.com/sdsi.cgi?h=NewsPages_2007_2nd_Qtr_e-Del_e-Arc

This NewsPages article is the most detailed description of the architecture employed, and should be read first!

- **Flow Chart Image:** **Img_eArceDel_flow.png** showing parallel rule-set structure, pseudo-code, and merge command placement. In **/help/** folder.
- **Webinar Powerpoint:** **eArchive_eDeliver.ppt** ... in **/help/** folder.
- 4-session Archiving Webinar powerpoint slides (version 7.0-based) ... request zip file.

4 SXe Form 1-sds versus Form 3-osx

This release, **v71-1** of eArchive eDeliver, features a flexible new rule file and rule set structure designed to accommodate either the use of SXe Form 1 documents or the use of SXe Form 3 documents, or a combination of the two.

Previous versions of SDSI's SXe rule files have only accommodated SXe Form 1 style documents, and the use of Form 3 style documents required custom rule set development.

SDSI uses the following designations to distinguish between Form 1 and Form 2 styles:

sds	Form 1	rule file: eDeliver_sxe- sds _sdsi_v71-1.rul rule file: eArchive_sxe- sds _sdsi_v71-1.rul
osx	Form 3	rule file: eDeliver_sxe- osx _sdsi_v71-1.rul rule file: eArchive_sxe- osx _sdsi_v71-1.rul

The rule sets inside each of the above files in addition carry a rule set name suffix of either **sds** or **osx**, as well, so that if rule sets need to be copied it will be clear what original style they corresponded with.

Generally speaking, any installation of SXe that previously employed the **rx-laser** product for document delivery will use the **osx Form 3** style document unForm. SDSI has developed a **script** named **uf_rxsfax.sh** to redirect output from this product's scripting mechanism to unForm.

The script produces an unForm trailer page for every header page created by the former product to pass document recipient information. The provided unForm rule sets then process the trailer page and convert it to SDSI's standard method 2 delimited line format for processing by the eDeliver rule set Engine.

If the **sds Form 1** style document is being used, then there is NO document recipient data being received in the print stream, so SDSI's method 3 CSV text file method for document recipient data is used. This method uses an entity ID from the document, like a customer or vendor number, to retrieve address data from the CSV test file using unForm's standard text file processing functions.

For flexibility and to prevent confusion, SDSI has separated these two styles of forms into separate rule files, has also designated text file samples as either being form 1 or form 3 raw text, and has segregated the demo launch scripts e1*.sh and e3*.sh for separate processing as well.

It is possible to use both styles of forms simultaneously for different document types. In that case, it is recommended that a site-named enhance rule-set like my_company.rul be created by copying one of the existing sxe-7*.rul files, then form rule sets from the other can be copied into that file to create a rule file with rule sets from both form styles. Note that it is recommended that the form style suffix **sds** or **osx** be retained on the rule set names for easy identification.

5 eConfig 101: Demo and Setup Steps

Demonstration: this download contains a fully operational demonstration of eArchive and eDeliver functions with very minimal rule-set pre-configuration, if these instructions are followed properly.

Zip File Install and unzip Location:

Install for Demo: the zip file should be extracted from the main uniform server folder into the main uniform server folder, such that the contents of the zip file populate the main uniform server folder with no additional intermediate directory in between. Accepting the default folder specification in the unzip or gunzip file extract process may result in a wrong folder tree structure for demo purposes.

BEFORE beginning to configure eArchive or eDeliver, for production use, by making rule-set changes, **we recommend that the Demo process be used to prove that all needed components or functionality are configured and working.** After you're satisfied that the demo functionality works on your system, move on to the customizing steps, if any, that take the package into readiness for full production mode.

- Demo and testing require that the target (3rd party) e-delivery server(s) (smtp email server and/or fax server and/or UnForm Windows support Server) be running. Read and follow any applicable instructions found in the **eConfig 102** section that relate to making sure the appropriate servers are configured and running.
- If using the SXe form 1 "sds" recipient-method 3 for the demonstration, see next item, but be aware you can change the eAddress recipient email addresses or fax numbers in the three CSV text files in the /eAddress/ folder to addresses or numbers that will deliver to an appropriate address for testing.
- For Email testing, the global EDOC_CCFORCE can be used to specify an internal email address for testing without editing the method 3 eAddress files. Note that if successful, SDSI will receive a copy of the test email, which we are happy to do if it streamlines the process of testing for our customers.
- Make sure that the **Exxx_FORCE_*** global(s) in the [X EDELIVER GLOBAL SETUP] and [X EARCHIVE GLOBAL SETUP] rule-sets for the function(s) that you want to test are set to **1** (one). See Appendix A and Appendix B for a listing.
- If you want to customize the archive library name prefix from **MySxe_** to something different like a client name, simply change the related global string in the global setup rule-set(s) mentioned in the previous paragraph.
- Use the script e*sxedemo.sh (Unix/Linux) or the VB script e*sxedemo.vbs (Windows) to build SXe demo archives and test the configuration. The * in the referenced script names is either a "**1**" for **sds** Form**1** or a "**3**" for **osx** Form **3** document styles. These scripts launch the UnForm client to archive and e-deliver documents using the sample text files in the /edemotxt/ folder as input.

OR

- Manually, using the UnForm Design Tool, load the esxe-7*.rul enhancing rule-file and individually preview each form. Note that some forms have multiple sample text files, so you may want to preview all samples for the most extensive test.

6 eConfig 102: Preparation for eDeliver Deployment

Determine which eDeliver functions you wish to enable AND which retrieval method will be used for each function selected.

Note: for Demo purposes, and SXe form 1 (sds) output, method 3 - CSV text file address retrieval is pre-configured. For SXe form 3 (osx) output, a preconfigured custom SXe method 2 - Delimited address retrieval is pre-configured. See **Appendix E** for details on form 1 versus form 3, "sds" versus "osx" rule-file versions, and their associated retrieval methods.

Note: UnForm's GUI design tool will greatly simplify maintaining and editing the rule-set(s) required delivery information. The design tool can display a grid of the document allowing easy access to page locations of fields like dates and ids. If you do not have the design tool, contact your dealer for purchasing.

Email

- If the emailing function will be used, make sure that mailcall.ini file, found in the UnForm "prog" directory, is configured with the SMTP server name or ip address. A default from email address can be setup, as well as a login and password for authentication purposes.

Fax

- If the faxing function will be used with MS-Fax, make sure the UnForm Windows Support Server is configured and ready, and that MS-Fax is installed and running.
- If the faxing function will be used with a 3rd party faxing software, like VSI-Fax, you will need knowledge of the command line syntax that drives your faxing software.

Address Retrieval

- If retrieval method 1, fixed location(s) on document, will be used, knowledge of the locations of the information will be needed.
- If retrieval method 2, delimited line(s) on document, will be used, knowledge of the layout of these lines will be needed. If using the **osx Form 3** variant, knowledge of the trailer page layout will be needed.
- If retrieval method 3, text-file retrieval, will be used, the file(s) must be available, and knowledge of the layout of the file will be needed.

Note: See **Appendix D** for method 3 Demo recipient address file conventions and notes

- If retrieval method 4, ODBC retrieval, will be used, make sure the UnForm Windows Support Server is configured and ready, and knowledge of the layout of the database will be needed.

7 Background 1 : eDeliver and eArchive parallel rule-file Flow

To understand how the new eDeliver / eArchive model works also please see the files mentioned in the Help resources section above.

The graphic image mentioned in Help resources shows the interrelationship and Flow that occurs between the following four Rule-Sets:

(note: the * below indicates that either **sds** or **osx** can be substituted, depending on whether **sds Form 1** or **osx Form 3** style documents are being employed)

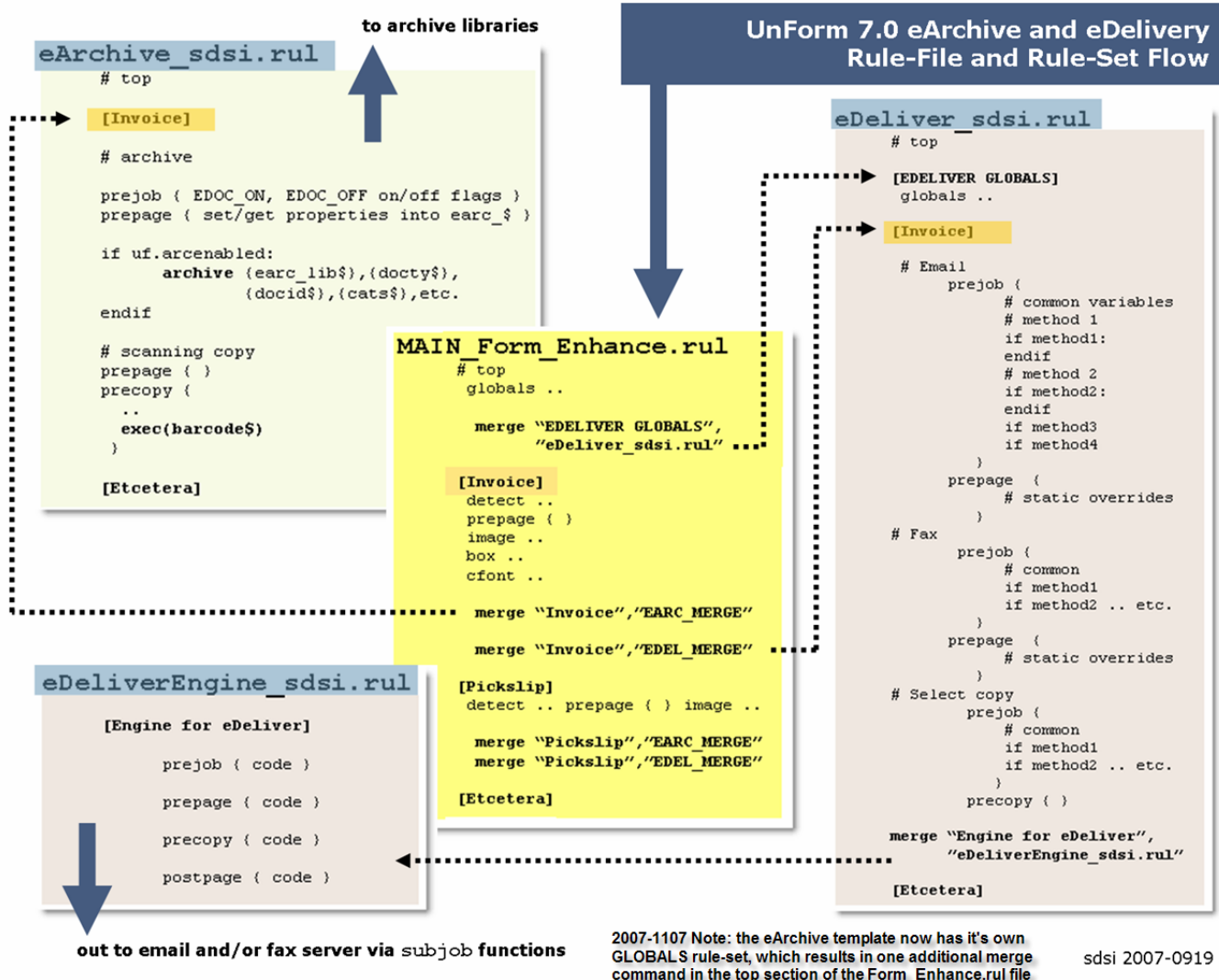
sxe-7*.rul	... the main form enhancement rule file
eDeliver_sxe-*_v71-1.rul	... email, fax, selected copy print rule file
eDeliverEngine_sdsi_v71-1.rul	... engine for eDeliver (maintained by sdsi .. do not modify)
eArchive_sxe-*_v71-1.rul	... document archiving rule file

The graphic flow diagram is presented on the following page along with some explanation.

Note that the Arrows in the diagram do not represent an actual internal UnForm flow from any strict timing standpoint, nor do they represent a program overlay flow, but are intended to show an output destination that is the ultimate result of the processing.

The UnForm merge command operates as an 'include' construct causing rule-set code to be merged into a rule-set for later execution.

Note also that the graphic on the next page is a smaller scaled version of the same image mentioned in the Help Resources.



Through this series of merged rule-sets, UnForm adds the eDeliver and eArchive functionality dynamically at run-time to the main form enhancement rule-set detected from the text form data passed to the server by the UnForm client. This allows the settings and parameters, and all the code-block processing logic, to be kept out of the enhancement rule-sets, which will allow all the features and functionality of the rule-sets to be maintained independently, and allow the integrator to easily turn-on and turn-off features.

See **Appendix A** and **Appendix B** for a listing of the **global setup rule-sets** in eDeliver_sxe-*_sdsi_v71-1.rul and eArchive_sxe-*_sdsi_v71-1.rul.

These rule-sets contains settings which an integrator should be familiar with in maintaining and or customizing the system.

Note in particular the EDOC_FORCE globals which can be used to globally disable or enable functions when applicable, without needing to go to individual rule-sets.

8 Background 2 : eDeliver delivery and retrieval methods

-- Delivery Methods

- Email - via interface with an accessible SMTP email server
- FAX - MSFAX or other commercial Faxing servers like the popular VSIFAX. Commercial faxing servers are generally more suited to high-volume faxing needs.
- Print Copy Control - dynamic control over which or whether any copies print to laser, independent or simultaneous with email and/or fax.

-- Retrieval Methods

- Method 1: Doc Print Stream **Fixed Position**
Your application places all the relevant data needed for electronic delivery **at fixed positions on the text page**.
- ** Method 2: Doc Print Stream **Delimited Line**
Your application places all the relevant data needed for electronic delivery in **a delimited line format** somewhere on the text page with a leading tag to identify the delivery method.
- ** Method 3: **CSV Text File Lookup**, entity ID in print stream
Using an entity ID like customer or vendor number contained on the form, UnForm retrieves all the relevant data needed for electronic delivery from **a CSV text file**.
- Method 4: **ODBC SQL Database Lookup**, entity ID in print stream
Using an entity ID like customer or vendor number contained on the form, UnForm retrieves all the relevant data needed for electronic delivery from **an ODBC connected database using a custom SQL command**, and parses the record returned to get all the relevant data needed for electronic delivery.

**** Note:** **For demonstration purposes, these rule-sets are pre-configured for, either method 3, if sds Form 1 style documents are used:**

This means an entity ID (customer, vendor, etc.) in the print stream is used to look up recipient data in a CSV text file. The location of the CSV files and their naming conventions, for demo purposes, are spelled out in the eDeliver globals rule-set (see appendix B), and using a form suffix constant at the top of the eDeliver rule-set.

or, for a method 2 variant, if osx Form 3 style documents are used:

This means a trailer page is sent in the print stream with document recipient data, and the unForm rule set converts the trailer page into a delimited line of data placed on the first page of each document.

..

9 Background 3 : eArchive

eArchive is very similar to eDeliver in how it is implemented, but in many ways much simpler, because there are fewer choices and options.

The goal of eArchive is to make it easy for the integrator to populate the archive property data that is associated with every document that is stored in the archive.

Archive Function

Archive document property information is critical for effective retrieval and association of documents.

While this could be done directly inside a form rule-set in the main enhancement rule file, it is easier to maintain, manage and control if a separate parallel rule-set is created that just contains the “code” for the archiving properties.

The Rule-set Flow image document referenced earlier shows how it works, and a review and analysis of the individual forms rule-sets in **eArchive_sxe-*_v71-1.rul** is necessary to get familiarized with the methodology if changes and customizations are going to be made to the property settings that have been pre-configured for SXe.

Rule-Set Code-block variables are populated with data from the text stream, and a pre-set archive command at the bottom references them.

Barcode Function

The UnForm Image Manager component provides an automated way to upload externally scanned documents to the UnForm archives. For documents that relate to existing documents in the archive, placing barcodes on the document that identify the document type and document ID allow the scanning process to automate the assignment of those two plus other document properties, making the process more efficient. The most common example in manufacturing or distribution is the signed packing slip which serves as legal proof of delivery.

The barcode function in eArchive contains the code necessary to open up a new region at the bottom of a laser or PDF document, and print the barcodes in that area which are needed to automate the scanning process. There are several configurable globals and variables at the top of the section, and the code below does the work and does not need to be maintained.

Appendix A : eDeliver_sxe-*_sdsi_v71-1.rul Globals Rule-set

Below is the main configuration rule-set in eDeliver_sxe-*_sdsi_v71-1.rul. This gets merged into the top of every form at run-time.

The integrator should understand the globals and values here and confirm that they are valid for the system during the setup and testing phase of the integration.

During the initial demo phase, the default settings for these parameters should work, with the possible exception of the PATH and FILE Location globals at the very top.

Globals are a text substitution command syntax, and UnForm uses these value assignments when referenced in later rule-set overlays, though note that they do NOT operate in UnForm's command and code-block syntax the same as programming level variables.

The #-sign indicates a remark. Each global parameter set of parameters is briefly explained in a remark section above the global assignment.

Note that this is form the **osx** version of the eDeliver rule files.

[X EDELIVER GLOBAL SETUP osx]

```
dsn_sample "/u0/uniform_test/_sdsi/sxe/eAddress/eAddr_PR_IN.csv"
dsn_sample "/u0/uniform_test/_sdsi/sxe/eAddress/eAddr_FX_IN.csv"
dsn_sample "/u0/uniform_test/_sdsi/sxe/eAddress/eAddr_EM_IN.csv"
dsn_sample "./eDoc/eDocAll_2007_0926.log"

## ----- ##
# Location of eDel/eArc parallel "shell" rulesets

# client or reseller path, set mergepath to "."
# for recommended install in main uniform server dir
global EDOC_MERGEPATH="."

# SDSI development path, remark with a leading '#'
# global EDOC_MERGEPATH="/u0/uniform_test/_sdsi/sxe"

## do not remark below, works with above
global EDEL_MERGEFILE="EDOC_MERGEPATH/eDeliver_sxe-osx_sdsi_v71-1.rul"
# Location and name of eDel "engine" rulefile/set

# mje 121907 ***** v20 ENGINE fixes !!
global DOC_ENGINE="EDOC_MERGEPATH/eDeliverEngine_sdsi_v71-1.rul"
global SET_ENGINE="Engine_for_eDeliver"

# EDOC_FORCE "force function in all rulesets" globals.
# 0-don't force, 1=force ON all, -1=force OFF all
# values affect deliv function (E/F/S) activation
# for ALL rule-sets,
# the '0=don't force' allows the func setting configured
# in each individual rule-set to govern
global EDOC_FORCE_EMAIL="0"
global EDOC_FORCE_FAXXX="0"
global EDOC_FORCE_SELCP="0"
```

<<-----

```
# delivery log detail, 1-minimal, 2-more, 3-full
global EDOC_DEBUGLEV=2
```

```
# Version-specific jobstore method parameter
# .. use the 7.0 method if you have an installation
# .. developed before 7.1 that involves code-block
# .. text moving operations, otherwise choose 7.1
#
# global EDOC_VERMETH="7.0"
global EDOC_VERMETH="7.1"
```

```
# delivery log location, separate daily log file name
# will be appended
#
global EDOC_LOGDIR="EDOC_MERGEPATH/eLog/"
```

```
# Company Abbreviation For default Subject
# Subject gets doc title and id appended to this
global EDOC_COABREVSUJ="MySxe3"
```

<<-----

```
# Add above abbrev as library name prefix 1/0
global EDOC_LIBCOABRSUB="1"
```

```
# EMAIL-specific globals
# disregard if email not used
```

```
# email smtp log location, used by engine to check for
# successful return status from email command, and text
# to match for a succesful submission. At log debug
# level 3 the full contents of the smtp comm file for
# each doc is written to the log
global EDOC_LOGSMTPDIR="EDOC_MERGEPATH/eLog/smtp/"
# email success ACK, do not change
global EDOC_EMOKACK="Client: QUIT"
```

```
# Force an Email CC, make "" if none
global EDOC_CCFORCE=""
```

<<-----

```
# FAX-specific globals
# disregard if fax not used
```

```
# use MSFAX? 0=no,1=yes
```

```
global EDOC_MSFAX=1
```

<<-----

```
# fax cover msfax default
```

```
global EDOC_FAXCOVER="generic"
```

<<-----

```
# fax cover vsifax default
```

```
# global EDOC_FAXCOVER="classic"
```

```
# fax command if NOT msfax (this one's vsiFax)
```

```
global EDOC_FAXCMD="vfx -Fpcl -n"
```

```
# fax driver/tag/sep if NOT MSFAX
```

```
global EDOC_FAXDRV="pcl"
```

```
global EDOC_FAXTAGARG=" -t "
```

```
global EDOC_FAXTAGSEP=" "
```

```
# Retrieval method for the address & other delv info,
# global retrieval method, can be overridden by func
# or ruleset.
# Methods Supported:
# 1-Fixed Doc Loc,
# 2-Delimited Doc Line,
# 3-Delimited Textfile Lookup
# 4-ODBC SQL Lookup
#
# Note: header page uses method 1 with overrides
# and custom prepage skip logic
#
global EADDR_METHOD=2
#
# method 2 suppress print force, -1,0,1 like forces
global EADDR_M2CYSUPPR=0

# retrieval method 3 text file parameters
# Note: EADDR_FORMSUFEX maintained in each rule-set
global EADDR_BASE="EDOC_MERGEPAH/eAddress/eAddr_"
global EADDR_EMSUFEX="EM_"
global EADDR_FXSUFEX="FX_"
global EADDR_SPSUFEX="PR_"
global EADDR_EXTE=".csv"

# entity prefix and suffix
global EDOC_PFX=""
global EDOC_SFX=""

# lookup get field delim meths 2,3,4
global EDOC_2DELIM="|"
global EDOC_3DELIM=", "
global EDOC_4DELIM=", "

# meth 2 line header, line end
global EDOC_LINEHDRE="EMAIL"
global EDOC_LINEHDRF="FAX"
global EDOC_LINEHDRP="PRINT"
global EDOC_LINEEND=""

# default copy number(s) to deliver
global EDOC_DEFL_COPY="1"

# erase after get meth 1,2
global EDOC_ERASE=1

# rule-set level on/off switch, DO NOT CHANGE next two
# just allows the flags to read "on/off" instead of 1/0
global EDOC_ON=1
global EDOC_OFF=0

# default trim setting, DO NOT CHANGE
global UFTRIM="Y"

#
## ----- ##
```

Appendix B : eArchive_sxe-*_sdsi_v71-1.rul Globals Rule-set

Below is the main configuration rule-set in eArchive_sxe-*_sdsi_v71-1.rul. This gets merged into the top of every form at run-time. The integrator should understand the globals and values here and confirm that they are valid for the system during the setup and testing phase of the integration.

Note that this is from the **osx** version of the eDeliver rule files.

[X EARCHIVE GLOBAL SETUP **osx**]

dsn_sample "./eDoc/eDocAll_2007_1031.log"

```
## ----- ##
# Location of eArc parallel "shell" rulesets
# no path needed if in main uniform server dir
# if main uniform server dir set mergepath to "."
global EDOC_MERGEPATH="."
```

<<-----

```
## ----- sdsi dev path
# make sure the below line is commented with #
# and the above line active for any customer sites
# global EDOC_MERGEPATH="/u0/uniform_test/_sdsi/sxe"
```

```
## do not remark, works with above
global EARC_MERGEFILE="EDOC_MERGEPATH/eArchive_sxe-osx_sdsi_v71-1.rul"
```

```
# EDOC_FORCE "force function in all rulesets" globals.
# 0=don't force, 1=force ON all, -1=force OFF all
# values affect archiving for ALL rule-sets,
# the '0=don't force' allows the func setting configured
# in each individual rule-set to govern
# archiving
global EARC_FORCE_ARC="1"
# barcoding
global EARC_FORCE_BCD="0"
```

```
# Company Abbreviation
global EARC_COABREVSUJ="MySxe3"
```

<<-----

```
# Add above abbrev as library name prefix 1/0
global EARC_LIBCOABRSUB="1"
```

```
# AR statement pdf hot link library and docty
global EARC_STMLINKLIB="MySxe3_Sales"
global EARC_STMLINKDOCTY="Invoice"
```

<<-----

```
global EARC_ON=1
global EARC_OFF=0
```

```
# default trim setting, DO NOT CHANGE
global UFTRIM="Y"
```

```
#
## ----- ##
```

Appendix C : eDeliver method 3 address Retrieval

The /eAddress/ folder contains three demo recipient address files that can be adapted for use. These files are already set up to be referenced in the Globals rule-set and the method 3 sections of the individual forms rule-sets in eDeliver.

Following are some notes regarding the demo address file naming conventions.

The demo eAddress files are the following:

eAddress /	eAddr_EM_IN.csv	EM=Email	IN=Invoice
	eAddr_FX_IN.csv	FX=Fax	IN=Invoice
	eAddr_PR_IN.csv	PR=Copy Print	IN=Invoice

These lines from the [X EDELIVER GLOBAL SETUP] rule-set establish the components needed for UnForm to build the proper file name.

```
# retrieval method 3 text file parameters
# Note: EADDR_FORMSUFFIX maintained in each rule-set
global EADDR_BASE="EDOC_MERGE_PATH/eAddress/eAddr_"
global EADDR_EMSUFFIX="EM_"
global EADDR_FXSUFFIX="FX_"
global EADDR_SPSUFFIX="PR_"
global EADDR_EXTE=".csv"
```

Each rule-set has a form address suffix global constant at the top. They are all pre-set to global EADDR_FORMSUFFIX="IN".

This file naming convention then allows each form, if necessary, to reference a separate address file by just changing the form suffix at the top of each eDeliver form rule-set, without going down into the method 3 code for each delivery method.

For example, global EADDR_FORMSUFFIX="PO" would cause the following files to be used instead:

eAddr_EM_PO.csv	EM=Email	PO=Purchase Order
eAddr_FX_PO.csv	FX=Fax	PO=Purchase Order
eAddr_PR_PO.csv	PR=Copy Print	PO=Purchase Order

Appendix D : eDeliver osx Form 3 hybrid method 2 address Retrieval

This method is generally used for unForm installations that previously used the **rx-laser** product for document delivery.

See section 4 for more information on this subject.

This section documents the standard layout of the header / trailer page data from SXe.

Data output from SXe for document recipient data is assumed to be in the following layouts. If for some reason it is discovered that it is not in exactly this format, it should be a simple adjustment to configure for a different data layout.

Email

Line	Description
------	-------------

- | | |
|---|------------------------------------|
| 1 | Literal "EMAIL" |
| 2 | To address |
| 3 | Subject |
| 4 | From address |
| 5 | Body text message (up to 10 lines) |

Fax

Line	Description
------	-------------

- | | |
|-----------|---|
| 1 | Literal "FAX" |
| 2 | Fax number |
| 3 | To name, number 1 |
| 4 | To name, number 2 |
| 5 | From name |
| 6 thru 15 | Body text message (fixed 10 lines reserved) |
| 16 | special reserved |
| 17 | special reserved |
| 18 | Confirmation email address |

Appendix E: Terminology

.rud files	These files are UnForm designer “copies” of the .rul file used for testing purposes. When your test results are as wanted, you can publish the .rud file to the .rul file.
.rul files	These files include 1 or more rule sets that define the enhancements to be performed on each document.
Code-block	Sections of the rule set, like prepage or postjob, of business basic (PVX or BBX) instructions that are executed at specific times. Must be syntactically correct syntax or errors will occur and be documented in error messages. Business Basic code can only be placed in code blocks. UnForm code can only be placed outside of code blocks unless used in an exec function.
Merge	An UnForm command which allows code and commands from outside the current rule set to be merged into the current rule set.
Publish	When you are done testing rule files in the designer, you must “publish” them to your “live” environment.
Shell	A form of template to be filled out with values to pass to the engine ... an external or outer shell.
Engine	Processing code and logic that drives the functionality and generally is not expected to be modified ... (what’s “under the hood”)

Appendix F: Sample Document Naming

Sample documents in the **esample_pdfs/** folder follow the following naming conventions:

The format of the file names is as follows:

aaa - bb - c -d [e] . pdf

Example: ack-sd-l-1.pdf ... acknowledgement, sd style, landscape, form 1 document style

Example: qte-sx-p-3e.pdf ... quote, sx style, portrait, form 3 document style, enhanced

aaa the document type:

ack	sales acknowledgement
ap_chk	AP check
crm	credit memo
inv	invoice
pck	pick slip
po	purchase order
qte	quote
rtn	purchase return
stm	statement
xfr	warehouse transfer

bb enhancement style:

sd	full enhancements, sdsi style (ref sds rule file)
sx	original SXe form 3 style, reduced set of enhancements (ref osx rule file, ref other laser tool being converting from)

c page orientation:

l	landscape
p	portrait

d SXe form number, document style

1	default print format
3	format used by other laser tool being converted from

e enhanced version of the sx style

In addition to the above, you will also notice that in the case of the sx style, there is a form version enhancements