

```
[8.0 README]
dsn_sample "/u0/unform_test/_oem/sxe/uf8/readme-sxe-v80.txt"
```

```
# To view this readme section inside the design tool without
# color and syntax error red-mark lines, TURN OFF syntax
# highlighting by pressing the color palette on the ribbon
# menu above!!
```

UnForm 8.0 Rule-file and supporting demo files for Sxe

Including these integrated features:
(as of 07/30/2010)

- Archiving preconfigured with standard properties
- Scanning barcodes on forms
- Statement with attached scanned proof of delivery copies out of archive
- PDF hyperlinks to invoices in archived statement
- Electronic form delivery by email or fax
- Page X of Y counters on forms and reports

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"sxe-v80.zip" File

Extract or place the contents into the main unform server folder.

Contents:

- sxe-v80.rul file
- sxe-demo-80.sh for Linux/Unix, build archive demo data
- sxe-demo-80.vbs for Windows, build archive demo data
- sxe-txt-form1/ folder containing sample text files
- sxe-txt-form3/ folder containing sample text files
- sxe-txt-form3-trailpage/ folder containing sample text files
- sxe-txt-other/ folder containing non-form1,form3 sample text files
- sxe-scan/ folder containing sample scans and the SXE_DOCS image manager job definition.
- sxe-scripts/ folder containing unform launch scripts for integration with SXE if using the trailer page method where SXE outputs the email delivery info

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New "utility" rulesets in the sxe-v80.rul file which support the new features:

```
[8.0 zMrg Configurator]
[8.0 zMrg ArcProps]
[8.0 zMrg PDFLinks v2]
[8.0 EDM6 BOOK]
[8.0 EDM5 TRAILPAGE]
[8.0 ED TAG PARSER]
[8.0 ED TAG PARSER SXE-TRAILPAGE]
[8.0 ED Selective Copy Printing]
[zMrgMultiPageXofY]
[zMrgSinglePageXofY]
```

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TURNING FEATURES OFF AND ON:

Top global section of the rule file has:

```
merge "8.0 zMrg Configurator"
```

to include the global constants that turn the new features ON/OFF by feature and ruleset.

See the constants in "8.0 zMrg Configurator" for which forms are archive-enabled, deliver-enabled, or scanning barcode-enabled, and to turn them on/off.

```
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```

For each SXE "enhancement" rule-set:

Original code blocks were moved to the bottom of the rule-set so that timing of text movement would be performed AFTER get() functions needed for archiving and deliver properties.

For NON-FORM1 or NON-FORM3 rule-sets:

Where applicable, the following code sections were inserted with processing code at the BOTTOM of existing rule-sets, but BEFORE the original code block section.

```
# --- 8.0 ARCHIVING -----  
# --- PDF HYPERLINK FOR ARCHIVING ----  
# --- 8.0 DELIVER -----  
# --- PAGE X of Y FEATURE -----  
# --- ATTACH SCANNED IMAGES -----  
# --- SCANNING BARCODE -----
```

FOR FORM1 and FORM3 (OSX and SDS) rule-sets:

The above-referenced code-sections were added to a merge rule-set appearing immediately following each enhancement rule-set, WHICH IS SHARED BY THE OSX AND SDS VERSIONS OF THE RULE_SET SINCE THE ARCHIVING PROPERTY TEXT LOCATIONS WERE IDENTICAL FOR EACH. Instead of the code sections appearing at the bottom of each rule-set, a "merge" command is used to include the related "8.0 Merge" rule-set.

Here's a cross-reference between the new rule-set sections and the new utility rule-sets that are merged:

```
# --- 8.0 ARCHIVING -----  
merge "8.0 zMrg Arcprops"  
  
# --- PDF HYPERLINK FOR ARCHIVING ----  
merge "8.0 zMrg PDFLinks v2"  
  
# --- 8.0 DELIVER -----  
merge "8.0 EDM6 BOOK"  
(or) merge "8.0 EDM5 TRAILPAGE"  
(which in turn does: merge "8.0 ED TAG PARSE")  
(or) merge "8.0 ED TAG PARSE SXE-TRAILPAGE"  
merge "8.0 Selective Copy Printing"  
  
# --- PAGE X of Y FEATURE -----  
Forms: merge "zMrgMultiPageXofY"  
Reports: merge "zMrgSinglePageXofY"  
  
# --- ATTACH SCANNED IMAGES -----
```

(No merges)
(Statement forms only)

--- SCANNING BARCODE -----
(No merges)

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ARCHIVING notes:

Archiving properties for each form and report are maintained centrally in the "8.0 zMrg ArcProps" rule-set. This model is used to facilitate mass re-indexing processes. By centralizing archive properties by form or report type in a single rule-set, a mass re-indexing rule-set will be able to access property assignments for multiple doc types in the same place that the new property assignments are coded for print jobs.

"8.0 zMrgArcProps" rule-set Maintenance:

To change the library names created on your system:

Change the following local constant to zero:

local EARC_LIBCOABRSUB=1

And/or change or make null ("") this library company abbreviation prefix:

local EARC_COABREVSUJ="MySxe"

See the individual form "case" statements for each ruleset to modify the earca_library\$ variable to change the library name from "Sales", "Accounting", etc.

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DELIVER notes:

8.0 uses the new DELIVER command.

Address retrieval methods can be chosen.

The EDEL_METHOD constant:

Choose either the address book method or the trailer page method by removing the #-sign from one of these lines in the "8.0 zMrg Configurator" rule-set:

global EDEL_METHOD="8.0 EDM6 BOOK"

global EDEL_METHOD="8.0 EDM5 TRAILPAGE"

If you want to use a different method contact SDSI support for assistance and/or see the samples/eDeliver80.rul for more examples.

Address Book Method:

Addresses are retrieved from an address book named "sxe" using an address entity ID somewhere on the form, e.g. customer number, vendor number, etc.

Trailer page method:

Raw text forms printed have a trailer page appended with address and tag data coming out of SXE.

If the address retrieved contains an @-sign an EMAIL will be submitted.

If the address retrieved does NOT contain @-sign, a FAX will be initiated.

You can customize tags for each form individually within each rule-set, in the routine underneath the merge for the address book.

You must configure/maintain the deliver.ini file for email tag and fax settings.

You must configure/maintain the prog/mailcall.ini file for email smtp server settings.

More information is available on *.ini configuration in uniform80.pdf.

The "sxe" address book can be defined in the UnForm browser interface. You can import addresses from an appropriately mapped CSV file to populate the address book.

See the "8.0 EDM6 BOOK" merged rule-set to see a hierarchy for looking up address info that demonstrates how to look up addresses with or without document types, suffixes or prefixes. The routines here are for demonstration purposes -- you can modify the address lookup logic to suit your needs, and/or contact SDSI for assistance.

If you want to use a method other than the address book method, contact SDSI about tailoring one of the pre-developed merge rule-sets for other methods that are contained in the samples/eDeliver8.0.rul file. Contact SDSI for possible updates to these templates.

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SCANNING BARCODE notes:

See the "BCOD_" series of contants in "8.0 zMrg Configurator" to turn scanning barcodes ON or OFF by form.

This line in the scanning barcode section opens up 7 rows at the bottom of the form for placement of barcodes, and causes the rest of the form to resize with a maintenance of its aspect ratio:

```
rows$=str(MAXROWS+7)
```

This line allows you to specify which copy of a form gets a barcode:

```
bcod_Copies$="2" # which copy(s) get barcode
```

To include the barcode on multiple copies, add the copy numbers to the string, e.g. bcod_Copies\$="123". Note that this syntax maxes out at 9 copies, so the pos() function would need to be modified if copy numbers above 9 need to be referenced.

The bcod_docty\$ variable places an abbreviated doctype code on the form that is mapped to the full archive document type in the image manager job definition that automates property index assignment on scanned documents. IF YOU CHANGE A DOCUMENT TYPE IN THE ARCHIVING RULE-SET, YOU MUST CHANGE THE CORRESPONDING ENTRY IN THE SCANNING JOB DEFINITION, IF THAT DOCUMENT WILL BE SCANNED AND UPLOADED.

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SCANNING JOB DEFINITION notes:

A scanning job defintion is provided called "SXE_DOCS.ufz" in the "sxe-scan" folder. Copy this file to the scanning/JobDefs folder of the image manager workstation. It has been designed to detect and process all the barcoded sxe forms using a single job, including header/attachment jobs where attachment pages receive the same indexes as the header page. Demo scanned images are provided for importing, both regular scans with no attachment pages, as well as ones with attachment pages.

DEMO BUILD SCRIPT notes:

****CAUTION**** THESE SCRIPTS ARE DESTRUCTIVE TO PREVIOUSLY ARCHIVED DOCUMENTS. PLEASE READ THIS CAREFULLY BEFORE USING THEM.

- sxe-demo-80.sh for Linux/Unix
- sxe-demo-80.vbs for Windows

Execute the appropriate script from the server folder where the zip file was extracted. It builds demo archives from the text samples contained in the "sxe-txt-*" folders. Note that the scripts have some settings at the top of each file for specifying what form types you want to build for forms and checks.

WHEN LAUNCHED, THE SCRIPTS START BY REMOVING THE SAMPLE LIBRARIES, SO DO NOT RUN THESE SCRIPTS ON A LIVE SYSTEM THAT USES THE SAME LIBRARY NAMES AS THE DEMO!!

See the Archive notes for how to change the library names for the live system.

Or modify the library name prefix at the top of the scripts to reference a non-live set of libraries.

The build scripts will also create PDF's of the documents in the respective text file folders. If deliver feature is enabled and address book entries exist for document recipient entities then emails or faxes will be attempted, assuming proper configuration of deliver.ini and mailcall.ini.

ATTACH SCANNED IMAGE notes:

The AR statement rule-sets contain a routine to retrieve scanned copies of invoices from the archive and attach them to the statement.

There is a global to turn this feature ON or OFF in the constants merged rule-sets.

By default, for each invoice listed on a statement, the routine looks for document images based on the following variables:

```
dotypes$="Scan" - the image sub-id begins with the word "Scan"
                 - change this in the ruleset if you change the sub-id in
                 the scanning job definition
tktlb$="MySxe_Sales" - change this in the ruleset to match your ssystem
tktdocty$="Invoice" - change this in the ruleset if you change the
                 doc type for archived invoices
```

Imagemagick and/or Ghostscript must be available for this feature to work.

By default images are tiled 2 across, 2 down in portrait orientation, as seen in the below command:

```
images {images$},across 2, down 2
```

Remove the across and down arguments to attach full page images.