

SX.e Standard Rule File Info Sheet

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UnForm: What/Where to Download

The UnForm application can be downloaded from:

<http://unform.com/sdsi.cgi?p=unform9&sp=download>

To download the application, you will need to fill in a simple form and press submit. This will take you to a page discussing the proper way to install UnForm for the operating system you are using. Make sure to get the v9.0 download and not one of the Legacy downloads.

The rule files and scripts, etc., can be downloaded as a zip file from:

<http://unform.com/sdsi.cgi?p=unform9&sp=articles/sxe>

This zip file includes

sxe-10x-v90.sds	standard rule file
sxe-10x-v90-conf.sds	configurator rule file
sxe-10x-v90-dtc.rul	desk top client for searching UnForm archived documents
sxe-10x-install folder	PDF's documents, script folder, language folder
sxe-10x-samples folder	PDF samples & input files for rule file enhanced SX.e documents
sxe-10x-scanning folder	files related to using the image manager to interact with the UnForm archiving
MANIFEST	list of the above files and folders

UnForm Configuration

Follow the installation instructions found on the download's page to install UnForm. Once UnForm is installed, set up, and licensed, use the browser to access the UnForm v9.0 Server portal <http://ServerNameOrIP:27292> (Replacing ServerNameOrIP for the customer's system) to access the documentation, configuration (server manager), and design tool. It is in the configuration (server manager) where you will set up emailing on the General tab as mentioned below in the **SX.e UnForm Integration** section and the External Tool tab where you will point to the Ghostscript and imageMagick executables as needed.

SX.e UnForm Integration

SX.e integrates with UnForm thru printers and/or scripts set up in SX.e menu selection “**SASP**”.

For example, a direct *nix printer could be defined as

```
uf90c -f "sxe rule file name" -o ">lp -dhp4000 -oraw" -ix
```

A direct Windows printer could be defined as

```
uf90c -f "sxe rule file name" -o "//pcname/ptrname" -ix
```

Printer definitions must end with “-ix”.

Instead of defining a printer in “**SASP**” as a printer, it can be defined as a script. This will be defined in the **SX.e UnForm Scripts** section.

For emailing, changes need to be made on the General tab in UnForm Server Manager Configuration or directly in the **mailcall.ini** file found in UnForm’s prog folder, to set up the SMTP server address, default from address and default port as needed. Set up authentication login and password as needed.

For faxing, changes may need to be made to the **deliver.ini** file to choose the correct faxing tool being used. This file can be found in the main installation UnForm folder (In Windows, this is the server folder.)

SX.e UnForm Scripts

Besides direct printers set up in SX.e menu selection “**SASP**” discussed in the **SX.e UnForm Integration** section, SX.e uses 2 printing and 2 faxing scripts to connect to UnForm, and these can be found in the zip file mentioned in the **UnForm: What/Where to Download** section. The scripts should be placed in the SX.e rd/bin folder. These scripts could require changes to match the customer’s system and the version of UnForm being used and the name of the rule file.

For printing on a *nix system, the scripts are called rxspintuf.sh and rxspintuf-asyncV9.sh. For faxing and emailing, they are called rxfaxuf.sh and rxfaxuf-asyncV9.sh.

For printing on a Windows system, they are called rxspintuf.bat and rxspintuf-asyncV9.bat. For faxing and emailing, they are called rxfaxuf.bat and rxfaxuf-asyncV9.bat.

The asyncV9 versions should be chosen for long jobs like month-end statements or daily invoice batch jobs.

Starting with UnForm 9.0.16, async has become much more flexible to better work with the system that UnForm is installed on. Two new parameters were added to uf90d.ini [defaults]:

rpqinterval=seconds to set how often the rpq sweeper fires (default=5)

rpqmaxjobs=count to set how many jobs can get released by the sweeper in one run. Use these values to control -async submitted jobs to avoid excess system resource drain. See Configuration in the manual for more details.

SX.e UnForm Rule File Specs

The standard SX.e rule files are provided for SX.e users and are expected to work for all releases of SX.e from 6.1.040 to the current 10x release based upon the standard sample print streams that were available at the time the rule files were created. The new rule files are far simpler to work with and have numerous common features that can be turned on or off by a simple flip of a “switch”. This will be discussed further in the **SX.e UnForm Rule Set Configuration** section.

The following notes can be found at the top of the rule file:

The below settings, in SX.e menu selection “AO” in GUI and “SASSR” in CHUI, applies to all forms unless commented otherwise in specific rule sets.

```
#           -      System : Report Items: oeepe, oeepp, oerd, oeepe, oeepl,
#                                     poepp, wtep, ares, apec (66 not 60),
#           -      Printing Parameters: main output and output 3 set to
#           -      132 cols
#           -      60 length      (66 for ap checks & remittance)
#           -      Paged is checked
#           -      Print Header is not checked
#           -      Allow Options Page is not checked
#           -      Force Standard Title is not checked
#           -      Archive is not checked
#
#           -      Documents : various documents : Printing
#           -      Print Format      : works for both form 1 & 3
#           -      Headings          : checked or not checked
#           -      Fax Format         : must be form 3 for rxs fax script
#
#           -      Do not print options page. Some rule sets will delete this page, but not all.
#
```

The UnForm SX.e rule files also expect the spacing required for international addresses.

If the above specs are not in place, please correct this and try the job again.

If the above specs are in place and you encounter an issue with the standard rule files, please follow the directions in the **SX.e UnForm Rule File Maintenance** section. If the issue is due to a standard, non-customized feature, the rule files will be modified by the author as needed to handle the issue.

If the issue is due to customization of the SX.e application, or the customer wants to modify the standard rule files for a different look-and-feel, the rule files may need to be modified. Before doing any modifications to the standard rule file, look at all the flags and see if the customer’s request can be handled with a simple trip of a switch. If that is not the case, check with the author and see if there is a planned modification that will cover the customer’s request. If neither of the above covers their request, then customizations will be needed. The author is currently working on some procedures that will make customizing and updating the rule file easier.

SX.e UnForm Rule File Maintenance

Many sample print streams have been used to create these rule files, but if an issue is found, Infor Direct SX.e customers should report the issue to Infor Xtreme (<https://www.inforxtreme.com>) and other SX.e customers should report it to their Infor Partner, with a description of the issue and a sample print stream that will duplicate the issue.

Use the –debug command line option to capture the sample print stream. This option can be added to the scripts as part of the UnForm command line, e.g.

Change “\$UnFormClient –ix” to “\$UnFormClient –debug –ix”

With this change, UnForm will no longer remove the input from SX.e, allowing the document to be tested in a development environment and make adjustments as needed to correct the issue found or add new features. The sample print stream will be named some.job#.in, e.g. 12345.in, and can be found in UnForm’s temp folder.

When new rule files are released, it is recommended you make a backup copy of the existing rule files. The new rule files will end with ‘.sds’ so it won’t overwrite yours. Just rename the ‘.sds’ rule files by changing the ‘.sds’ to ‘.rul’.

The new rule file will have much of the common mods moved to the configurator rule file so that most changes that are made will be easy to keep in the separate configurator rule file called sxe-10x-v90-conf.rul. You could then compare the current standard rule file to the updated standard rule file for other changes and compare the configurators to see what changes have been made and need to be merged into the new rule file or the new configurator rule file.

SX.e UnForm Rule File Configuration

The standard rule file, sxe-10x-v90.rul has a global section at the top that gives lots of information and instructions for using this rule file.

The sxe-10x-v90-conf.rul rule file has the Configurator rule set. In this rule set, one can globally turn on or off most features for ALL documents that use that feature. It also has document specific flags that can individually turn on or off features for each document. (See the **SX.e UnForm Rule Set Configuration** section for a discussion of this ability.)

If your license includes the design tool, you can edit the rule file with that.

There are also numerous global constants that can be set up at this point. For example, you can set up the company logo; choose a level for rule set logging; change the default enhancement to be applied for certain features; and turn SMTP logging on or off.

The rule files have a lot of internal documentation to help with any configuration available.

SX.e UnForm Rule Set Customization

With release 9.0.02 of the SX.e standard rule file sxe-10x-v90.rul, the ability has been added to the standard rule file to load rule set customizations from the configurator rule file sxe-10x-v90-conf.rul.

For example, suppose you want to add the taken by field to the output of the invoice document. You would 1st determine where you want to place the field on the page. Suppose you decide to place it directly below the Terms field. The configurator has many invoice merge rule sets already available to add customizations to. We would suggest using the zMrgInvInstr merge rule set in the sxe-10x-v90-conf.rul file for the region of the page where you want taken by to display. The taken by field has been preloaded already (oeeh.takenby\$), so it is just a matter of adding some code that will take advantage of that. To match the current code and its use of flags, we would suggest code like the following:

```
# taken by field
prepage {
    if add_shade_box_on then :
        pagecmd$+="$0a$+"cbox 124,17.5,"+str(MAXCOLS-0.5)+",18.5,1,ISHADE"
    else
        pagecmd$+="$0a$+"cbox 124,17.5,"+str(MAXCOLS-0.5)+",18.5,1"
    endif
}
text 125,18,"Taken By",ICFONT,cols=8,spacing=1
text 125,19,{oeeh_takenby$},DBCFONT,cols=8
```

If you are using the v9.0 design tool, you can load the standard rule file on one tab; right click on the tab and choose duplicate tab; now load the configurator rule file on the 2nd tab. After making the changes to the configurator rule file, remember to save and publish the rule file. Then switch to the standard rule file tab and test your changes.

SX.e UnForm Rule Set Configuration

Each rule set has been pre-coded with many features and it is a simple matter to edit the Configurator rule set in the configurator rule file, sxe-10x-v90-conf.rul, to turn features on or off. By default, each rule set has been set with some common features turned on and others turned off.

If your license includes the design tool, you can edit the rule file with that.

Here is a sample list of features available for many of the documents (this list was taken from the configurator rule set for acknowledgement features):

ACK/QTE flags

The below flags default to on: (change to 0 to turn off.)

global ADD_COPYTITLE_ACK	=1	# add copy title to the output
global ADD_DETAIL_LNS_ACK	=1	# add vertical detail lines to the output
global ADD_FULLBOX_ACK	=1	# add a full page box to the output
global ADD_PAGEXOFY_ACK	=1	# add page x of y to the output
global ADD_LOGO_ACK	=1	# add logo to the output
# add box and detail item shading		
global ADD_SHADE_BOX_ACK	=1	# add box shading to the output
global ADD_SHADE_ITEM_ACK	=1	# add item line shading to the output
global ADD_WATERMARK_ACK	=1	# add watermark to the output
# portrait or landscape		
global USE_PORTRAIT_ACK	=1	# use portrait orientation on the output
# want emailing and/or faxing?		
global ADD_DELIVER_ACK	=1	# add emailing and faxing

The below flags default to off: (change to 1 to turn on.)

# turn off shading for faxing and/or emailing (default is off on these)		
global DEL_FAX_SHADE_ACK	=0	# delete shading on output on faxes
global DEL_EMAIL_SHADE_ACK	=0	# delete shading on output on email
# want logging?		
global ADD_LOGGING_ACK	=0	# add job logging for debugging purposes
global ADD_PRINTSELECTOR_ACK	=0	# print selected copies
# want archiving?		
global ADD_ARCHIVE_ACK	=0	# add archiving
global ADD_SCANBCD_ACK	=0	# add scanning barcode to the output
global ADD_BCDALL_ACK	=0	# barcode all copies
# print time and date?		
global ADD_PRINTTIME_ACK	=0	# add print date & time to the output
# delete specified detail fields?		
global DEL_DISCMULT_ACK	=0	# delete discount multiplier detail column on output
global DEL_QTYUM_ACK	=0	# delete qty u/m detail column on output
global DEL_PRCUM_ACK	=0	# delete price u/m detail column on output
global DEL_UPC_ACK	=0	# delete UPC item # detail column on output
global DEL_CORRTO_ACK	=0	# delete correspondence to section

Each rule set has a lot of internal documentation that can be used to help with configuration or modification. Further questions can be directed to your Infor contact or Partner.