pitney bowes

Shipping and Mailing
Inserting

Relay™ 5000/6000/7000/8000

with File Based Processing Software

Admin Guide

US English Edition
SV63132 Rev D
September 15, 2020

Use this guide to support admin level activities related to the proper operation and maintenance of the file based processing software on the Relay 5000/6000/7000/8000 inserter. This information also includes file based processing software troubleshooting topics.

Version History

Document Part Number	Release Date	Comments
SV63132 RevB	August 1, 2015	Initial release
SV63132 RevC	June 1, 2016	Modified content to reflect product change - Planet Press no longer required to run file based processing.
SV63132 Rev D	September 9, 2020	Add warning note regarding operating systems to Product Overview. Also replaced the Input File Contents table in Input File chapter.

Related Documentation

- Relay 5000/6000/7000/8000 with File Based Processing Operator Guide (SV63079)

Table of Contents

1 - Product Overview

In this section

Relay (5000-8000) Inserter with File Based Processing

Important Note:

Operator System Requirements Operating System Windows 7 Professional / Windows 10 Professional** User account with need Administrator settings. If the User does not have Administrator settings, windows may throttle processor time and network time. If this happens during a mail run, some messaging may be impacted causing FBP to "lose" piece data.**

Mail stream integrity is the ability to ensure our clients deliver envelopes to their customers with only the intended enclosures.

Overview

The Relay(5000-8000) Inserter with file based processing software is a solution that processes mail with a high degree of mail run and mailpiece integrity. The file based software works with the inserter to ensure that every mailpiece is completed with the correct contents.

This software provides centralized control that allows the file based software PC to control operational areas on the inserter. The software can detect inserter problems. When material jams or inserter problems occur, the software pinpoints them swiftly to minimize machine downtime.

The solution uses bar coded documents that enable a dedicated computer to keep track of the piece during the process and tell the inserter how to build each mailpiece to the specified completion. This is known as file based processing, which provides mail piece integrity to the mail operation.

Reporting Feature

This solution also provides robust reporting about the inserter, operators, jobs, and mail runs. Reports can be viewed and printed from the system or data can be exported for external processing.

Additional Features

This software solution provides a number of other useful features, including mailpiece reconciliation and an *Account Pull* tool that allows operators to divert pieces by identifying accounts prior to running a job.

The Relay inserter with file based processing supports many additional features provided by the tabletop inserter, such as edge marking for auditing or postal sortation; select feeds, which allow additional pages or inserts to be included based on conditional data; and envelope select, which allows an alternate envelope to be used.

How it Works

The file based processing software runs locally on a PC. When the host software produces the printed pieces for the mail run, it also creates a Mail Run Data File (MRDF). The MRDF includes specific customer information for all of the mailpieces in the run. When the MRDF is created it is moved to the file based software PC.

When the operator opens the MRDF for the first time, two more files are created to help support mailpiece integrity during processing - the Interlock and Output files.

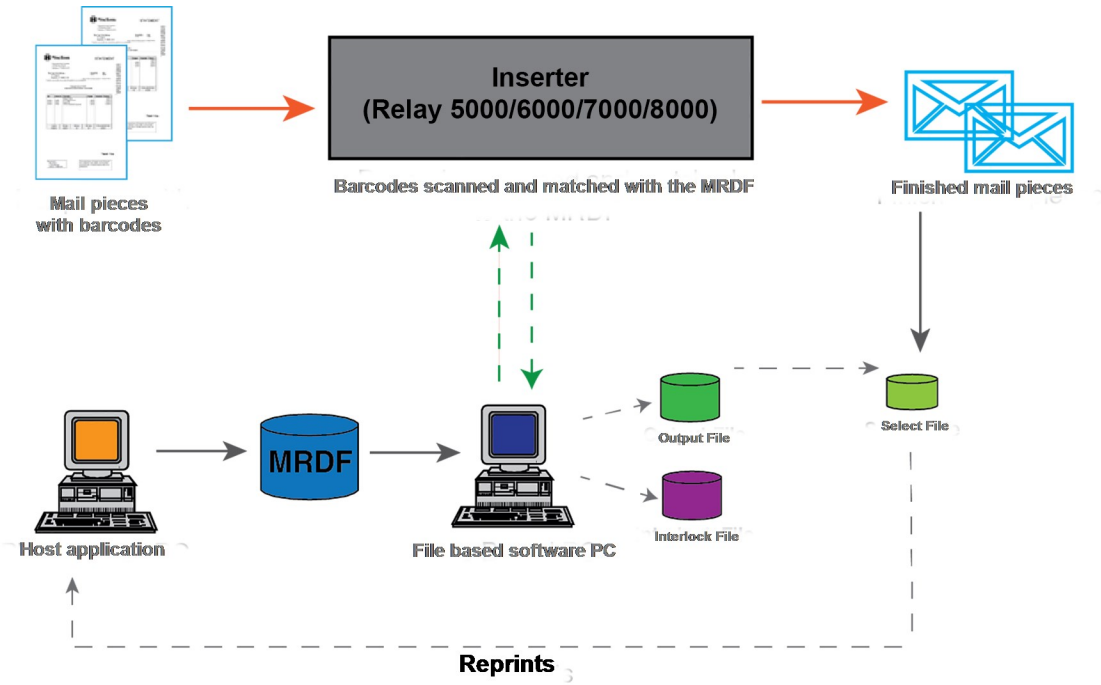
- **Interlock file**- contains one record for each mailpiece and is used to record status (good, bad or unknown).
- **Output file** - contains one record for each mailpiece and is used to record everything that happens to that mailpiece while it is on the inserter.

Each page in the job has a bar code that contains instructions for each assembled mailpiece. That bar code also contains a piece ID that identifies which assembled mailpiece the page belongs to. For example, a monthly statement with a bar code is fed into the inserter. The system reads and decodes the bar code, and the decoded information is used to retrieve the instructions from the MRDF for assembling the mailpiece.

As the inserter feeds the pages it reads the bar codes, and reports to the software the piece ID of the page being processed. The software then matches the piece ID to a record in the MRDF, and it provides further instructions to the inserter on how to process that specific page or assembled mailpiece. When the mailpiece is finished, the inserter reports success back to the software.

Once all the material in the job is run the Output file creates an additional file called the **Select file**. The Select file is used to create reprints for damaged mailpieces that need to be reprinted. This file is automatically sent to the host software. Once the reprints are produced, they are run using the Select file.

System Workflow Diagram



Relay(5000-8000) Inserter with File Based Processing Software - Flow Diagram

File Based Processing Terms

To assist in your understanding of file based processing, here is a list of common terms.

Common File Based Terms

Term	Definition
Piece ID	Each sheet has a barcode containing the piece ID and this piece ID connects each sheet to a data record containing the same piece ID in the MRDF file. The piece IDs in a mail run are sequential.
Barcode	The file based process uses a barcode to identify each sheet scanned on the inserter. The barcode is scanned and the decoded data is used to find the control information in the MRDF file and to determine how to collate the incoming sheets.
File Based Processing PC	All of the MRDF files are stored on the file based processing PC. This PC usually interfaces with the host application so that the MRDF and Select files (used for reprints) can be transferred between both applications.
Mailpiece	This refers to a finished collation comprised of one or multiple assembled sheets.
MRDF (Mail Run Data File)	The MRDF contains one record for each mail piece. The data from this file is used to control the assembly of each mail piece, such as the number of sheets to be accumulated, which feeders should feed, selective outsorting, etc. The MRDF is located in the C:\DC\Drives\M\Input folder.
Interlock File	The Interlock tracks the status (good, bad, unknown) of each assembled mailpiece as it travels through the inserter. An Interlock file is automatically created the first time the MRDF is opened on the inserter.
Output File	The Output file contains the details for each finished mailpiece within a job. For example, it can include whether the mailpiece reaches the output stacker, was outsorted by the system, is lost due to a material jam, was removed by the operator and more. The output file is located in the C:\DC\Drives\M\Output folder.
Select File	The Select file is automatically created by the Output file. It contains one record for each mailpiece that may have been damaged or outsorted and needs to be reprinted. This file is sent to the host application for creating the pieces that need to be reprinted. The select file is located in the C:\DC\Drives\M\Select folder.

Barcode Specifications

Relay 5000 - 8000 inserters support 2D data matrix barcodes.

Barcode Physical Dimensions - 2D Data Matrix

Both the High Capacity Sheet Feeder (HCSF) and the tower support 2D data matrix barcodes.

2D Barcode Specifications - HCSF

Item	Minimum	Maximum
# of characters	1	32*
Symbol Width	3.3 mm (0.125")	15.875 mm (0.625")
Symbol Length	3.3 mm (0.125")	19.05 mm (0.75")
Module Size	0.330 mm (0.013")	0.635 mm (0.025")
# of modules (square)	10 x 10	24 x 24
# of modules (rectangle)	8 x 18	16 x 48

**** Software ignores any data beyond the 32nd character***

2D Barcode Specifications - Tower

Item	Minimum	Maximum
# of characters	1	32*
Symbol Width	3.3 mm (0.125")	12.5 mm (0.492"")
Module Size	0.330 mm (0.013")	0.635 mm (0.025")
# of modules (square)	10 x 10	32 x 32

**** Software ignores any data beyond the 32nd character***

Printing Specifications for 2D Data Matrix Barcodes

- Codes must be printed with black ink on a white background (contrast must be greater than 75%)
- Code cannot be printed over any text or graphics
- Code should not intersect any perforation
- Printer should be set for printing at 600 DPI or higher
- Codes must be Barcode Quality Grade of A (using an ISO15415 standard barcode grader)
- Only 2D barcodes in the data matrix format are supported

Inserter Barcode Setup

Function	Abbreviation	Characters	Bits	Size	Options	Comments
					Code Type: Data Matrix First Page Only: No:	
Job ID	JID	1	4	8	Controlling: No Code: Type: String Code Base: 32 LSB: last	• The Job ID is a string-based function, not number-based function. • It is typically a 6 or 8 digit number that remains constant throughout the job. • When **Trial Piece** is pressed, the Job ID is read from the first piece and compared to the Job ID numbers in the rest of the run. • If the Job ID number changes withine same job, the system stops processing the material. An error displays stating a Job ID mismatch
Match Code	MC	9	4	6	Controlling: Yes Code Type: CCDe Code Base: 10 Wrap at 999999 Include Zero: No Count Direction: Down LSB: Last	• This function is used as the Piece ID in an open or closed loop control system. in conjunction with an external host computer. • In this case the match code should be unique within the run.

Function	Abbreviation	Characters	Bits	Size	Options	Comments
Page Number	PN	15	4	2	Controlling: No Code Type: CCD Code Base: 10 Count Direction: Down LSB: Last	Represents the page number within the current collation.
Page Count	PC	17	4	2	Controlling: No Code Type: CCD Code Base: 10 LSB: Last	Sets number of documents fed per collation.
Client Use	CU	19	4	2	These are compacted bits they do no need to be set up. The inserter ignores them.	These two characters are used for specific client use, such as select feeds or edge marking.

2 - User Lists and Permissions

In this section

User Permissions

Each system has a list of users with associated user accounts and permissions. This enables you to manage users and provide security on which user account types can perform certain system tasks.

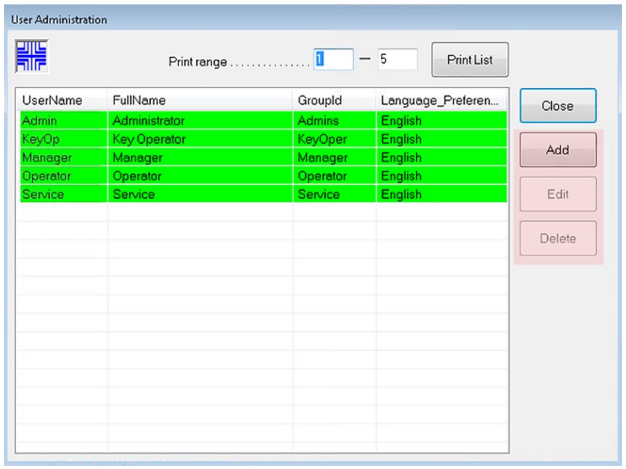
The file based processing software comes with preloaded user accounts with specific passwords and permissions.

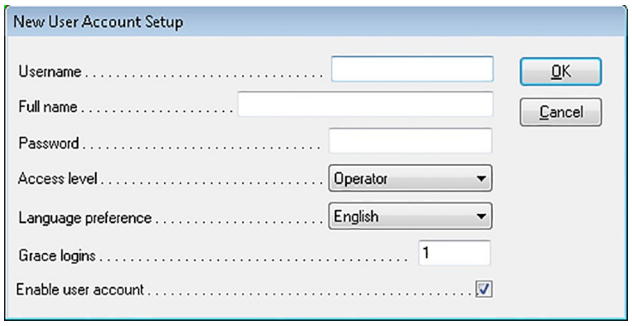
User Account	Permissions	Password
Admin	• load/save modes • run a job • create a report • access to Direct Reports • edit user list	admin
KeyOp (Key Operator)	• load a mode • run a job • create a report • access to Direct Reports	key
Manager	• load/save modes • run a job • create a report • access to Direct Reports • edit user list	mana
Operator	• load a mode • run a job • create a report	1234

Add and Edit Users

The user list can be modified to add or delete users, change access levels and passwords.

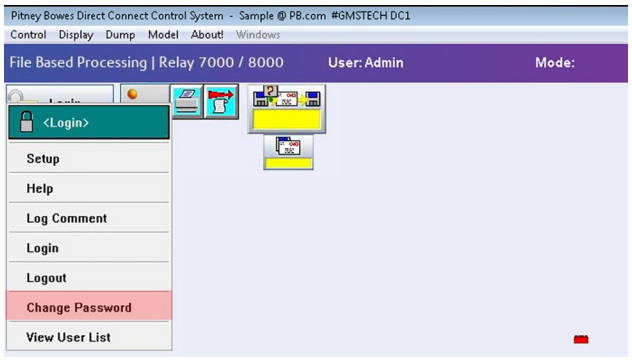
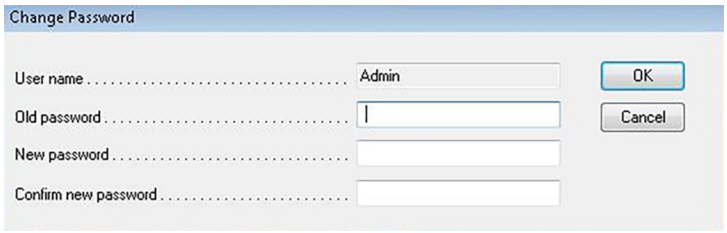
To edit the user list:

#	Steps	Actions
1	Log in as Admin or higher.	
2	Click **Login** on the main screen and select **Edit User List** from the drop-down menu	
3	When the User Administration dialog opens, highlight a user and click **Edit** or **Delete** to either modify or delete a user profile. *If you are adding a user you can also click **Add** to get to the next screen.*	

#	Steps	Actions
4	If you are editing or adding a user the Edit/Add dialog opens. Make your changes to an existing user or add a new user by entering info into the following fields. • **Username**: • **Full name**: • **Password**: • **Access level**: • **Language** • **Grace logins:** *Be sure to select the **Enable user account** checkbox.*	
5	Click **OK**.	

Change User Password

To change the user password:

#	Steps	Actions
1	Log in as Operator or higher.	
2	Click **Login** on the main screen and select **Change Password** from the drop-down menu.	 
3	When the Change Password dialog opens, edit the password and click **OK**.	

This page intentionally left blank.

3 - File Based Software Tools

In this section

Common File Based Processing Software Folders

These are common file based software folders. It is important they stay as is; do not modify these folders.

- **MRDF (Input) Folder** - C:\DC\drives\M\Input\
- **Output File** - C:\DC\drives\M\Output\
- **Select File** - C:\DC\drives\M\Select\
- **Archive Folder** - C:\DC\drives\M\Archive\

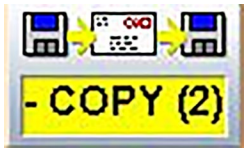
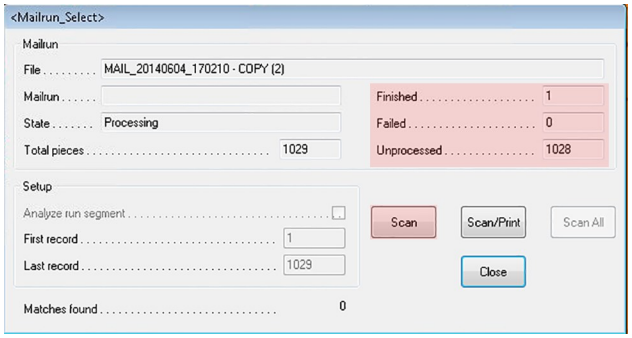
Create a Select File for Reprints

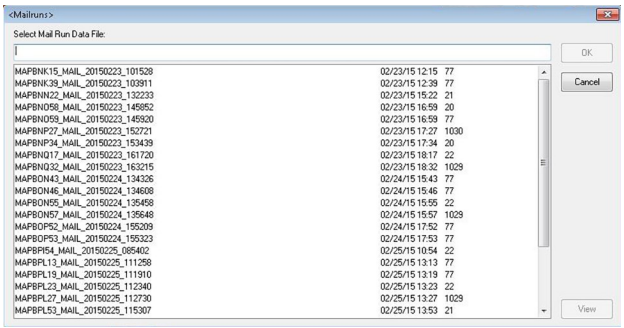
At the end of a job run there may be pieces that were damaged and unprocessed. If this happens these pieces must be sent for reprint. In this case operators will generate a **Select** file for running the mailpieces that need to be reprinted. The Select file is a system generated file that provides a list of all failed and unprocessed mailpieces to be used to prepare for running reprints.

Note:

The select file is located in this order: C:\DC\Drives\M\Select folder. One of these processes applies:

- If Planet Press is the host system, it monitors this folder for the select file.
- If the Relay Hub is the host system this file needs to be manually retrieved and uploaded to create reprints.
- If neither of the above hosts are used, the Select file needs to be retrieved and used to create the needed reprints.

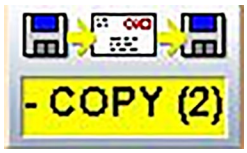
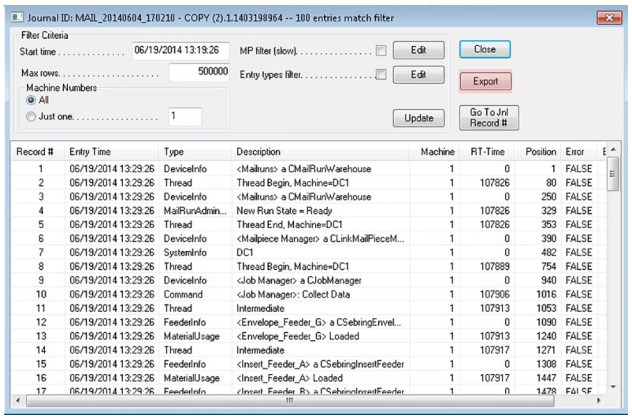
#	Step	Action
1	Click the **Mailpiece Manager** icon on the main screen and select **Tools>Create Select File** from the drop-down menu.	
2	When the dialog opens you will be able to view the total **Finished**, **Failed**, and **Unprocessed** mailpieces. Click **Scan** . This creates a Select file and places it in the **M:\Select directory**.	

#	Step	Action
3	Click **Close**. *This automatically unloads your job..*	
4	Reload the job.	
4	Once the failed and unprocessed mail pieces are reprinted, click **Job Manager** from the main screen.	
5	When the dialog opens highlight the **MRDF** for the job you were running previously and click **OK**. *The job is reloaded. Once a mail piece is manually repaired it is removed from the Select file.*	

Journal View

Service or administrators may need to review or send a journal of system activity to an engineer for troubleshooting. The journal is a list of selections users have made within a certain time period. This log supports troubleshooting activity by enabling reviewers to understand what users were trying to do at the time the issue occurred.

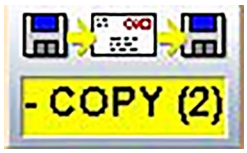
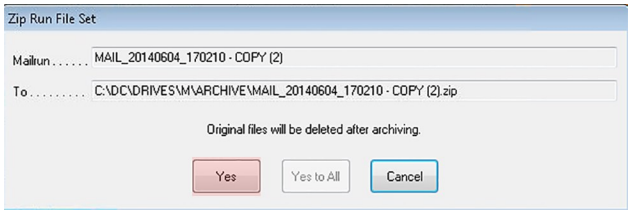
To use the **Journal View** option follow these steps.

#	Step	Action
1	Log in as Service or higher.	
2	Click the **Mailpiece Manager** icon on the main screen and select **Tools>Journal View** from the drop-down menu. *When the Journal dialog opens you can view system activity.*	
3	If you need to export the Journal View data into a file for review, click **Export**.	
4	When the **Save As** dialog opens, navigate to the folder where you would like to save the Journal file and click **Save**.	

Archive a Job

In some instances Service may need to go back to review job information for troubleshooting purposes. You can archive particular mail runs using the **Archive Job** option for this purpose.

To use the **Archive Job** option follow these steps.

#	Step	Action
1	Log in as Key Operator or higher.	
2	Click the **Mailpiece Manager** icon on the main screen and select **Tools>Archive_Mailrun** from the drop-down menu.	
3	When the Zip Run File Set dialog opens click **Yes** to zip and store the files.	
	The files are zipped and archived in the **M:\ARCHIVE** directory, which can be accessed by Service.	

Note:

Once archived, the original files will be deleted.

Automatic Backup and Archive of the Output File

Every 14 days the file based processing software automatically creates a backup of the **Output** file for customer records. The backup of the Output file is stored as .txt file. the archive file is located in the C:\DC\drives\M\Archive folder.

Archiving Output Files - Proof of Compliance

All **Output** files should be archived (*not* deleted) on a regular basis for permanent proof of correct mailpiece assembly.

This page intentionally left blank.

4 - Required File Types

In this section

Required File Types

File based processing requires these file types:

- *Input file*
- *Select file*
- *Output file*

Input File

An Input file or (Mail Run Data File (MRDF) is generated for every mail run. Input files have the file extension MRDF and are located in the **C:\DC\Drives\M\Input** folder on the file based processing system.

The Input file contains a unique mailpiece record for every mailpiece in the run. The mailpiece record identifies specific inserter control parameters associated with each mailpiece.

Input files should have a unique name for each mail run. When the operator starts a mail run, the system shows the names of the Input files as the mail runs that are selected.

Input File Contents

Field	Start Field	Field Length	Name	Description	Comments
1	0	8	JobID	This field can be populated with an account identifier that is also found in human readable format on the physical mailpiece. This identifier is shown in Direct Connect when mail piece specific information is displayed. It helps the operator relate a physical mailpiece to this information in the software.	Alphanumeric field
2	8	6	PieceID	This value must match the barcoded Match Code printed on the input documents. It is the link between the scan code and the mailpiece record in the Input file that contains the assembly instructions for that mailpiece. This value must be unique for each mailpiece, and must increment by 1 for each record within the file.	Numeric
3	14	2	TotalSheetsInputFdr1	This field identifies the total number of physical sheets of the controlling paper in the collation fed from the high cap sheet feeder.. If the input feeders are linked, you need the total sheets field for both input feeders.	Numeric

Field	Start Field	Field Length	Name	Description	Comments
4	16	20	AccountIdentifier	This field can be populated with an account identifier that is also found in human readable format on the physical mailpiece. This identifier is shown in Direct Connect when mail piece specific information is displayed. It helps the operator relate a physical mailpiece to this information in the software.	Alphanumeric
5	36	5	InputWeight	Complete field used by the Relay inserter. Leave this field blank, place a single 0 or place 0.000 in this field.	Alphanumeric
6	41	1	InsertFeeder01	This field specifies whether or not an insert feeder should feed an insert.. Possible values for this field are: 0= Don't Feed, 1=Feed. This needs to match the select feeds in the barcode.	Numeric
7	42	1	InsertFeeder02	See Insert Feeder 1 for definition	Numeric
8	43	1	InsertFeeder03	See Insert Feeder 1 for definition	Numeric
9	44	1	InsertFeeder04	See Insert Feeder 1 for definition	Numeric
10	45	1	InsertFeeder05	Future enhancement. Relay currently supports four select feeds	Numeric
11	46	1	InsertFeeder06	Future enhancement. Relay currently supports four select feeds	Numeric
12	47	1	SelectAccessory1	Future enhancement. Relay does not currently support selectable accessories	Numeric
13	48	1	SelectAccessory2	See Select Accessory1	Numeric
14	49	1	AccountPull	Populated by file based processing	Numeric
15	50	1	QualityAudit	Instructs the inserter to divert for the finished mailpiece to be inspected. This field is not included in the barcode.	Numeric
16	51	1	AlertAndClear	Used by console inserters; does not apply to the Relay inserter.	Numeric

Field	Start Field	Field Length	Name	Description	Comments
17	52	40	RecipientName	Specifies the name of the receiver of this mailpiece.	Alphanumeric
18	92	40	RecipientAddress1	Specifies the address of the receiver of this mailpiece.	Alphanumeric
19	132	40	RecipientAddress2	Recipient Address 2	Alphanumeric
20	172	40	RecipientAddress3	Recipient Address 3	Alphanumeric
21	212	40	RecipientAddress4	Recipient Address 4	Alphanumeric
22	252	40	RecipientAddress5	Recipient Address 5	Alphanumeric
23	292	40	ReturnAddressName	Specifies the name of the sender of this mailpiece.	Alphanumeric
24	332	40	ReturnAddress1	Return Address 1	Alphanumeric
25	372	40	ReturnAddress2	Return Address 2	Alphanumeric
26	412	40	ReturnAddress3	Return Address 3	Alphanumeric
27	452	40	ReturnAddress4	Return Address 4	Alphanumeric
28	492	40	ReturnAddress5	Return Address 5	Alphanumeric
29	532	31	IntelligentMailBarcode	IMB full service barcode	Alphanumeric
30	563	100	UserDefinedField1	Allows for additional information a customer may require in their MRDF.	Alphanumeric
31	663	1	EndOfInputDataFlag	End of Record = X	Alphanumeric
Total Characters = 664					

Select File

A Select file, also know as an exception or reprint file is created after the mail run. It contains a record for each mail piece that was not processed successfully by the system or manually repaired. The Select file enables you to reprint damaged, lost or otherwise suspect mail pieces.

Many of the fields in the Select file are populated using information from the *Input file*. If the Input file is not correct, the Select file does not include the information.

The Select file is located in the **C:\DC\Drives\M\Select** folder on the file base processing system PC. This file is used by the customer to develop a method to reprint damaged or unfinished mail pieces from the mail run.

Select File Contents

Field	Name	Start At	Length	Description
1	JobID	0	8	Contains same value as the JobID field in Input file.
2	PieceID	8	6	Contains same value as the PieceID field in Input file.
3	AccountIdentifier	14	20	Contains same value as the Account Identifier field in Input file.
4	MailpieceStatus	34	10	High-level mail piece status: • Good • Maybe • Bad • Pending • Null (unprocessed)

Field	Name	Start At	Length	Description
5	Disposition	44	1	Specifies the mail piece disposition. This information is collected by the file based processing software during the inserting process. Possible values: 0 = Unknown 1 = On Inserter 2 = Removed due to Jam 3 = Removed by Operator 4 = Outsorted 5 = Successfully Rendered 6 = Never Processed 7 = Manually Rejected 8 = Manually Repaired 9 = Deferred
6	DispositionText	45	25	Specifies the text description of the mail piece disposition. This information is collected by the file based processing software during the inserting process.
7	CauseBin	70	4	Specifies the reason code why the mailpiece disposition was changed. This information is collected by the file based processing software during the inserting process.
8	CauseBinText	74	20	Specifies the text description of why the mailpiece disposition was changed. This information is collected by the file based processing software during the inserting process.
9	ReprintIndex	94	20	Field used by console inserters; does not apply to the Relay inserter
10	UserDefinedField1	114	30	Contains same value as the User Defined field in Input file.
11	UserDefinedField2	144	30	Contains the same value as the User Defined field in the Input file.
12	UserDefinedField3	174	30	Contains the same value as the User Defined field in the Input file.
13	UserDefinedField4	204	30	Contains same value as the User Defined field in Input file.
14	UserDefinedField5	234	30	Contains same value as the User Defined field in Input file.

Field	Name	Start At	Length	Description
15	EndOfRecord	264	1	This field is blank.
Each line is 265 characters long				

Output File

An Output file is generated with each *Input* file. Each mail piece in the Input file has a corresponding record in the Output file. The first time an Input file is opened, an associated Output file is created.

The Output file contains run-time information collected by the inserter and pass-thru fields for each individual mail piece. The data in these fields has significant to customer applications, for example, an account identifier.

The Output file is located in the **C\DC\Drives\M\Output** folder on the file based processing system. Customers can use this file to collect data on the disposition of mail pieces in the mail run. The Output file is automatically archived 14 days after the mail run has been completed. Archived mail runs are zipped and saved in the **C:\DC\Drives\M\\Archive** folder.

Output File Contents

Field	Name	Start At	Length	Description
1	JobID	0	8	Contains same value as the JobID field in Input file.
2	PieceID	8	6	Contains same value as the PieceID field in Input file.
3	TotalSheetInputFdr1	14	2	Actual total sheets fed per mailpiece from input feeder.
4	AccountIdentifier	16	20	Contains same value as the Account Identifier field in Input file.
5	InputWeight	36	5	Contains same value as the Input Weight field in Input file.
6	InsertFeeder01	41	1	Contains same value as the Input Feeder 01 field in Input file.
7	InsertFeeder02	42	1	Contains same value as the Input Feeder 02 field in Input file.
8	InsertFeeder03	43	1	Contains same value as the Input Feeder 03 field in Input file.
9	InsertFeeder04	44	1	Contains same value as Input Feeder 04 field in Input file.
10	InsertFeeder05	45	1	Contains same value as Input Feeder 05 field in Input file.
11	InsertFeeder06	46	1	Contains same value as Input Feeder 06 field in Input file.
12	SelectAccessory1	47	1	Contains same value as Select Accessory 01 field in Input file.
13	SelectAccessory2	48	1	Contains same value as Select Accessory 02 field in Input file.

Field	Name	Start At	Length	Description
14	AccountPull	49	1	Populated by file based processing system. A **1** means the system pulled the document and a **0** means that it was processed by the inserter
15	QualityAudit	50	1	Contains same value as the Quality Audit field in Input file.
16	AlertandClear	51	40	Contains same value as the Alert and Clear field in Input file.
17	RecipentName	52	40	Contains same value as the Recipient Name field in Input file.
18	RecipientAddress1	92	40	Contains same value as Recipient Address1 field in Input file.
19	RecipientAddress2	132	40	Contains same value as Recipient Address2 field in Input file.
20	RecipientAddress3	172	40	Contains same value as Recipient Address3 field in Input file.
21	RecipientAddress4	212	40	Contains same value as Recipient Address4 field in Input file.
22	RecipientAddress5	252	40	Contains same value as Recipient Address5 field in Input file.
23	IntelligentMailBarcode	292	31	Contains same value as Intelligent Mail Barcode field in Input file.
24	UserDefinedField1	323	100	Contains same value as the User Defined field in the Input file.
25	UserDefinedField2	423	100	Not used for the Relay inserters
26	UserDefinedField3	523	100	Not used for the Relay inserters
27	UserDefinedField4	623	100	Not used for the Relay inserters
28	UserDefinedField5	723	100	Not used for the Relay inserters
29	TimeStamp	823	25	Time mailpiece was processed. Format is: MM-DD-YYYY HH:MM:SS.
30	MailpieceStatus	848	25	High-level mailpiece status - Good, Maybe, Bad, Pending.

Field	Name	Start At	Length	Description
31	Disposition	873	25	Mail Piece Disposition: 0 = Unknown 1 = On Inserter 2 = Removed due to Jam 3 = Removed by Operator 4 = Outsorted 5 = Successfully Rendered 6 = Never Processed 7 = Manually Rejected 8 = Manually Repaired 9 = Deferred
32	DispositionText	898	25	Specifies the text description of the mail piece disposition.
33	ExitLocation	923	25	Physical location where the mail piece left the inserter.
34	Mode	948	25	Identifies the inserter mode that was loaded for the job.
35	ActualInsertFeederScan	973	25	Not used for the Relay inserters
36	ActualOutputScan	998	25	Not used for the Relay inserters
37	ReprintIndex	1023	25	Not used for the Relay inserters
38	EndOfRecord	1048	1	

Each line is 1049 characters long

This page intentionally left blank.

5 - Direct Reports

In this section

Direct Reports

The file based processing software comes with a reporting module called **Direct Reports**. Direct Reports provides details on both system and operator productivity. It is a Microsoft Access database that is set up to retrieve data from the software and display it using the Access reporting engine.

Direct Reports allows users to query and display data in nine different reports:

- Complete Alarms Report
- Top Ten Alarms Report
- Job Report
- Operator Report
- Application Report
- Production Inserter Report
- Single Inserter Chart
- Customer Report Classic
- Customer Report Graphical

Note:

Direct Reports does not support custom reports.

Users can select one or more reports to view or print, configure a date range, and filter the data based on the mode, job, inserter, or operator. In addition to viewing and printing reports, data can be exported from Direct Reports in Microsoft Excel format. These reports are configured when the software is installed.

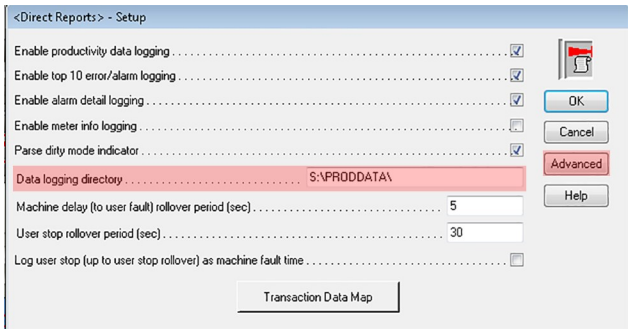
Direct Reports is configured with the correct data paths and they should not need to be changed. If for some reason the paths are incorrect or need to be modified, refer to the topic *Modify Data Paths in Direct Reports*.

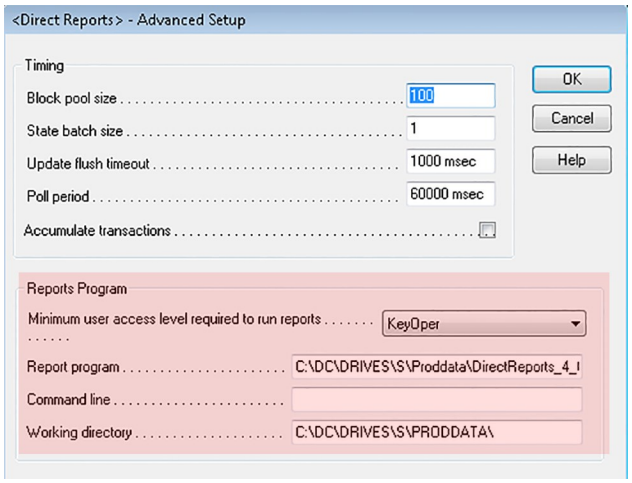
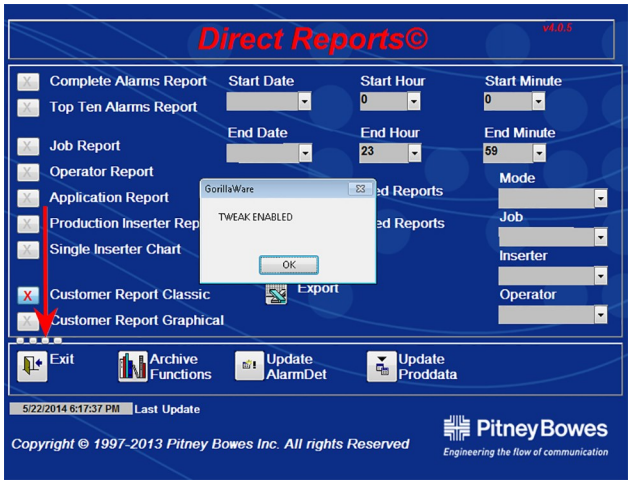
In addition to English, Direct Reports can be configured to display in all languages supported by the file based processing software.

Modify Direct Reports Data Path

Direct Reports comes configured with the correct data paths already installed and they should not need to be changed. When Direct Reports loads, it automatically loads file based processing software data from the **C:\Proddata** folder.

To modify the Direct Reports data path:

#	Step	Action
1	Log in as Service or higher.	
2	Click the **Direct Reports** icon from the main screen and select **Setup**. The Direct Reports dialog opens.	
3	Verify that the **Data logging directory** field shows **S:\PRODDATA** as the target folder. (The **S:** drive is located in C:\DC\drives\S). *This information has to match the information that appears in Direct Reports, so they both report to S:\PRODDATA.*	
4	Click **Advanced**.	

#	Step	Action
5	In the **Reports Program** section of the Advanced dialog verify: • User access level - *the customer will instruct you as to which user level Direct Reports will be accessed* • Report program path - *actual file location (C:\DC\S\proddata\DirectReports_X_X_X.mdb)* • Command line - *should be left blank unless otherwise noted* • Working directory - *is where the Direct Reports database is stored, which is currently:**C:\Proddata***	
6	Click **OK** and **OK**.	
7	Click the **Direct Reports** icon and select **Direct Reports** from the drop-down menu.	
8	To change the Direct Reports path to point to the data being produced, hold [**Ctrl**] + [**Shift**] + [**E**] to access the paths.	
9	When the Tweak dialog opens, double-click the third little square over the **Exit** button.	

#	Step	Action
10	When this screen opens, verify or modify the following paths: • **Data** path: C:\Proddata\ • **Excel Default** path: C:\Proddata\ • **Export Default** path: C:\Proddata\archive\ • **Import Default** path: C:\Proddata\ • **Append Default** path: C:\Proddata\append\ *IMPORTANT: Verify there is not a "\" at the end of the data path; the software will not work if there is.*	
11	Once the paths are verified and corrected if necessary, click **Close** and exit out of Direct Reports.	

This page intentionally left blank.

6 - Additional Features

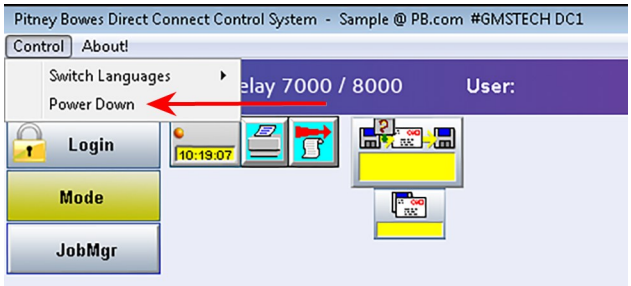
In this section

Stand Alone Mode

Stand alone mode is used to disable the file based processing program to allow the inserter to run a stand alone job or to shut down the file based program to retrieve files from the proper folder to be used outside of the system.

Follow these steps to:

- Turn off file based processing and allow the customer to access folders on the system *OR*
- Run non-file based processing jobs on the inserter

#	Step	Action
1	Power on the inserter.	
2	If the file based software PC is powered on, exit out of the software by selecting **Control>Power Down** in the main software menu.	
3	Program the job through the inserter interface.	

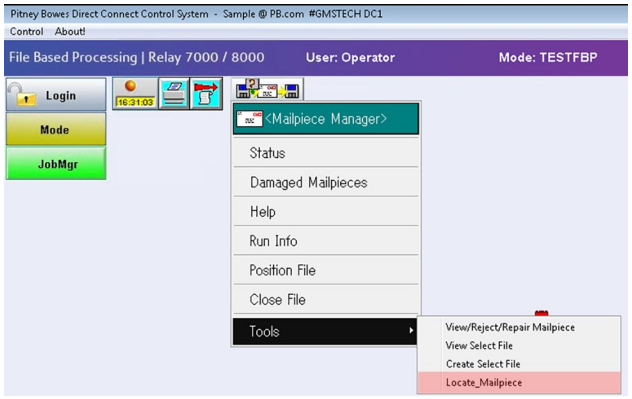
Account Pull Tool

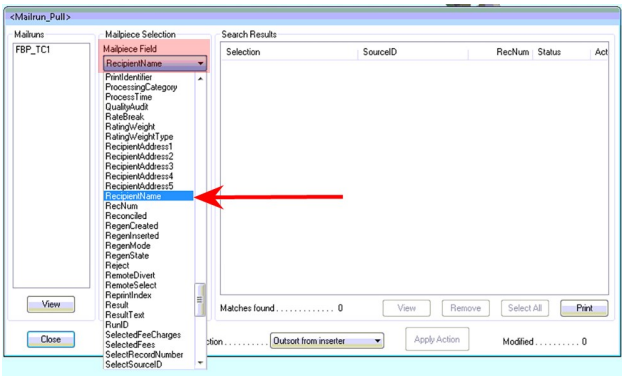
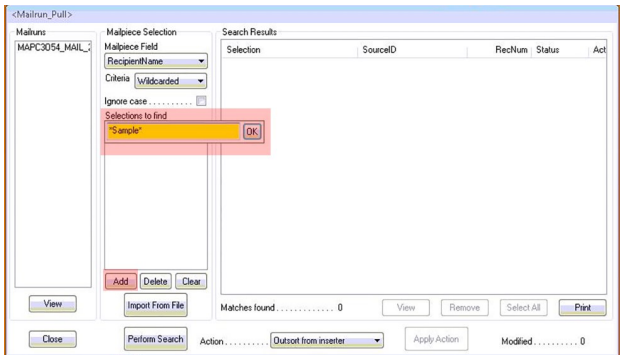
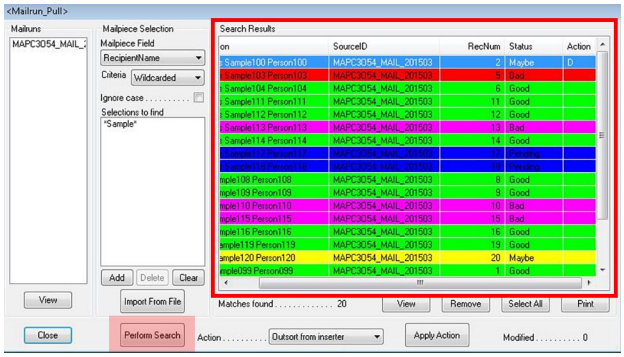
The Account Pull tool lets you divert a group of mailpieces from a job based on a particular set of criteria. Access level to this is configurable, although it is usually used by Admin and higher.

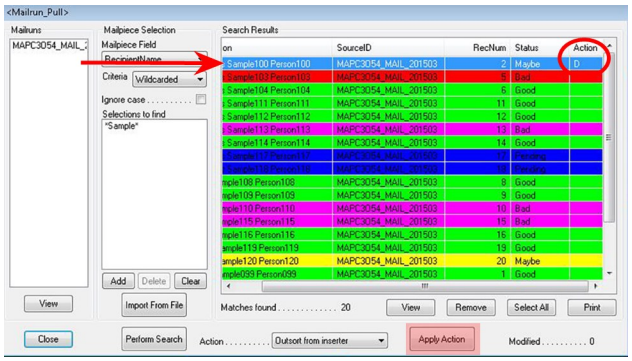
Note:

The software model must be edited to include the Account Pull tool for it to work.

To use the Account Pull tool:

#	Step	Action
1	Log in as Admin or higher.	
2	Click the **MailPiece Manager** icon on the main screen and select **Tools>Locate Mailpiece** from the drop-down menu.	

#	Step	Action
3	In the **Mailpiece Field** drop-down select the filter criteria. *(In this example we used **Recipient Name**.)*	
4	Click **Add** .	
5	In the **Selections to find** field type an entry with a wild card **"*"** at the beginning and end of the entry, to search for a particular file(s). (*In this example we used *Sample**) Click **OK**.	
6	Click **Perform Search**. The **Search results** area populates with results.	

#	Step	Action
7	Highlight a record and select **Apply Action**. A **"D"** displays in the **Action** column.	
8	Click **Close** to exit the tool.	

This page intentionally left blank.

7 - Hand Scanner Setup

In this section

Set the Hand Scanner Volume

You can configure the volume on the hand scanner that comes with the system. The scanner comes with instructions that include setup bar codes. If you don't have access to those bar codes, they are included here as a backup.

Perform these steps to adjust the volume of the "beep" on the scanner.

#	Step	Barcodes
1	Scan the bar code for the desired volume.	Low Beeper Volume  Medium Beeper Volume  High Beeper Volume 
2	The scanner adjusts itself to the desired sound level.	

Set the Hand Scanner Carriage Return

You can configure the carriage return settings on the hand scanner that comes with the system. The scanner comes with instructions that include setup bar codes. If you don't have access to those bar codes, they are included here as a backup.

To set the scanner so the [**Enter**] key is automatically pressed after scanning each mailpiece (as opposed to pressing [**Enter**] manually each time a mailpiece is scanned), perform these steps.

#	Step	Barcodes
1	Scan the barcode to set the carriage return.	<DATA> <SUFFIX 1> 
2	The scanner adjusts the carraige return setting to be automatic after each mailpiecve is scanned.	

This page intentionally left blank.

3001 Summer Street
Stamford, Connecticut 06926
www.pitneybowes.com

SV63132 Rev D