pitney bowes

Shipping and Mailing

Relay® Communications Hub
Version 2.4.4

Print Manager Administrator Guide

Table of Contents

10 - Defining Your Organization

11 - Managing Bundles and Triggers

12 - Administrating Relay Communications Hub

13 - Managing Your Contact Information

14 - Desktop Client

15 - Auto-Submission Console

16 - Printer Driver Installation

17 - Creating A Job

18 - Viewing Job Reports

19 - Glossary

20 - CSV File Formats

21 - Activity Logging

22 - Predefined Roles

23 - System Requirements

24 - More Information

1 - About This Guide

This guide has been written with the System Administrator (subsequently known as the Administrator) in mind and describes the operation of the Relay Communications Hub Web Client and Desktop Client. By following the procedures given in this guide you will be able to:

From within the User website:

- Create users
- Define your organization by creating Departments and assigning Users
- Manage roles
- Manage access pools
- Manage authorization pools
- View your organization
- Manage attachments
- Manage sheet stock
- Manage communication types

From within the Relay Communications Hub web client:

- View reports on completed jobs
- Create a Template
- Edit a previously created Template
- Upload a data file
- Apply a Template to the data file
- Download the resulting PDF and related files
- View reports on completed jobs
- Manage user access
- Invite others to use Relay Communications Hub
- Edit your profile
- Download the Desktop Client

> **Note:** You have the user credentials to be able to manage bundles and triggers, this is usually considered the responsibility of the Chief Operator in the Print Room, but this role overlaps with that of Administrator in this area. It could also be that the Administrator role holder and the Chief Operator role holder are the same person.

In addition, you will be able to use the Relay Communications Hub desktop client's hot folders to automatically process files.

In this section

Version History

Date	Version	Comments
July 2016	2.0	Initial Version
October 2016	2.0.5	Job Report icon updates. Sign in time-out after 30 minutes. Link to "My Account".
January 2017	2.1	Create a Template facility added.
April 2017	2.2	Updated screen shots. Addition of Nudge & Scale functions.
August 2017	2.3	New error tracking functionality in the Job Details-Print tab.
February 2018	2.4	• User Administration functions updated. • Department & User administration moved to Relay Communications Hub pages. • User Profile updated.
October 2018	2.4.1	Added: • Interface navigation overview • Note on using TrackMyMail • Password Expiry • IP Whitelisting • Creating a job functionality for Service Users • Updating software
January 2020	2.4.4	• Version upgrade only

Related Documentation

Document Name	Date	Comments
Printer Manager User Guide	October 2018	Describes the user functions of Relay Communications Hub.
Printer Manager Operator Guide	October 2018	Describes the print room operations of Relay Communications Hub.

2 - Overview

Relay Hub Client provides you with the facility to modify jobs. These jobs are contained in a data file and are uploaded to the Relay Hub in which a specific Template is applied and the results can then be downloaded. Templates are a set of actions performed as a result of tests on specific sections of the data file (pages, sides, textural elements, feed statements, PDL comments or the existence of resources with specific names). Scripts control how a Template is applied to a data file in order to modify your jobs.

Templates are created specifically for your company, each one tailored to your requirements and using your own resources and material. The Templates available to you are governed by your login credentials.

Relay Communication Hub allows you to upload your files from a Web Client and a Desktop Client. You may use the Web Client directly, or download the Desktop Client, which provides a directory structure containing a hot folder for each of your Templates. Drop a file into a hot folder for the relevant Template and your job is processed automatically.

In this section

Template features

Relay Communications Hub capabilities are available in packages. To offer one or a combination of these, specific Templates are created for you for specific jobs to take advantage of the features of these packages. Templates are created by the PB "on-boarding" team.

When a single file is uploaded and processed, this is referred to as a "Template".

When two or more files are uploaded and combined, or used together, for example, reprint, this is referred to as a "bundled template". Print driver jobs are collected together for processing, this is also referred to as a "bundled template".

Templates output one or more of the following:

• a data file for download
• mail pieces for printing and insertion into envelopes
• emails sent
• files archived.

Package overviews

The following packages are currently available:

Enhancement

Input files can be enhanced with the addition of forms, tables, graphics and highlights. An example of this can be seen in **Examples of enhanced jobs** on page 12.

Mailing

Combine mail pieces for the same recipient. This is known as Grouping if the input is a single data file or House Holding if multiple input files are combined and then sorted.

In addition, the Addressing functions enables the use of email addresses within the data file or from look up tables. These are used as recipient addresses to which the job in the data file will be sent. In addition, it enables replacement of email addresses where they are different from those given in the data file.

Once the data file is uploaded and the Template applied, emails are sent. The Job Reports facility then provides information on which emails were sent, which were blocked by the recipient and which were not received.

Emailing

This is similar to mailing and differs only in that the mail pieces are emailed to the recipients rather than being printed, inserted and sent by post.

> **Note:** Email cannot be purchased separately, but only with another package.

Printing

Conversion of one print format to another, for example, PDF to PostScript.

Integrity

An OMR (optical mark recognition), 1D or 2D barcode is added to each page. These are scanned for a variety of confirmation tests.

OMR is the most basic. In its simplest form it indicates start and end pages of a mail piece. A more advanced OMR has a counter on each page to enable detection of missing sheets.

1D Barcodes can store more information than an OMR. For example, the information contained in the barcode could contain: the total pages in a mail piece, the current page in a mail piece and a counter on each page to detect missing sheets.

2D Barcodes can store even more information. In addition to the information stored by 1D barcodes, they have a unique identifier for the original file. They can also store address information.

MRDF (machine-readable data file) is a text file containing the address and page count information from a data file. Scanned barcodes can be checked against this list to confirm that all pages are delivered to an envelope.

File Based Processing (FBP) software uses 2D barcodes and MRDFs to display the progress of a data file.

If mail pieces are missing a `*.Rprnt.txt` file is produced containing information to identify them. This is known as a reprint file; this and the print data file previously downloaded from Relay Communication Hub are uploaded to a Reprint-Template. The result is a print file containing only the missing mail pieces. Once printed and inserted, the File Based Processing software updates to show all mail pieces are complete.

Performance

Pitney Bowes fulfillment partners print and insert your mail pieces.

Examples of enhanced jobs

Examples of enhanced jobs are given below. Templates have been applied which add predefined elements.

Local Improvement District Bill

In the example below, you can see a Local Improvement District Bill, the 'before' image shows the bill as it exists in the data file. The 'after' image shows the bill once an enhancement Template has been applied. In this case, a form has been applied and color added to draw the recipient's eye to the important areas of the job.

A job before the Template is applied: The same job after the Template is applied:

You can see how the form breaks the information into related areas, making the job easier to read and how the color highlights the most important areas.

Emtexvde SuperChoice MasterTrust

In the example below, you can see a letter concerning Emtexvde SuperChoice MasterTrust. The 'before' image shows the letter as it exists in the data file. The 'after' image shows the letter once an enhancement Template has been applied. In this case, a logo has been added to the top right corner, marketing text and an image has been added under the signature and the text giving the issuing company's information has been changed to blue.

A job before the Template is applied:

The same job after the Template is applied:

In addition, an MDRF file has been created containing the information from the letters in the original file.

Print Streams

The Relay Communications Hub gives print room operators control of print streams by providing the ability to group jobs with common attributes into a single print stream. This print stream can be set to automatically be released to either hot folder or a configured printer when a maximum number of pages or mail pieces has been exceeded or at a specified time of day. This means that a large volume of mail pieces may be printed in on session, thereby reducing the need to reset and refill printers with different paper and inserters with different envelopes and inserts. The object of Relay Communications Hub is to reduce printer down time by maximizing the through put of mail pieces requiring the same stationary. In addition, postal discounts are easily obtained for the high volumes of mail created.

The following illustrates the flow of mail pieces through Relay Communications Hub.

Mail pieces	Users create mail pieces, the letters sent out to customers, are mail merged through Microsoft Word and are then: • Submitted to Relay Communications Hub through the Printer Driver • PDFed and uploaded to Relay Communications Hub through the Create a Job web client, or • PDFed and dropped in to a Relay Communications Hub hot folder This Microsoft Word Document or PDF is known as a job.
Jobs	A mail merged Microsoft Word or PDF file containing multiple mail pieces.
Print streams	Print streams are the jobs submitted by users concatenated, or grouped by common attributes, such as paper size, envelope size, color printing. Chief operators create bundles which define these common attributes and as each job reaches Relay Communications Hub it is added to the print stream matching attributes. The Chief Operator sets triggers for each print stream, specifying the criteria at which print streams are automatically released for download to hot folders, or if configured, printers. Operators are responsible for loading the required paper on to the printers and the envelopes and inserts into the inserters. They oversee the printing and mailing of the print streams and then mark them as printed in the **Released Print Streams** page of Relay Communications Hub. This print confirmation is shown in the user's **Job Reports** page, so that they can see that their job is complete.

See the **glossary** for help on the terms used in this guide.

Relay Communications Hub's work flow

The following diagram illustrates Relay Communications Hub's work flow.
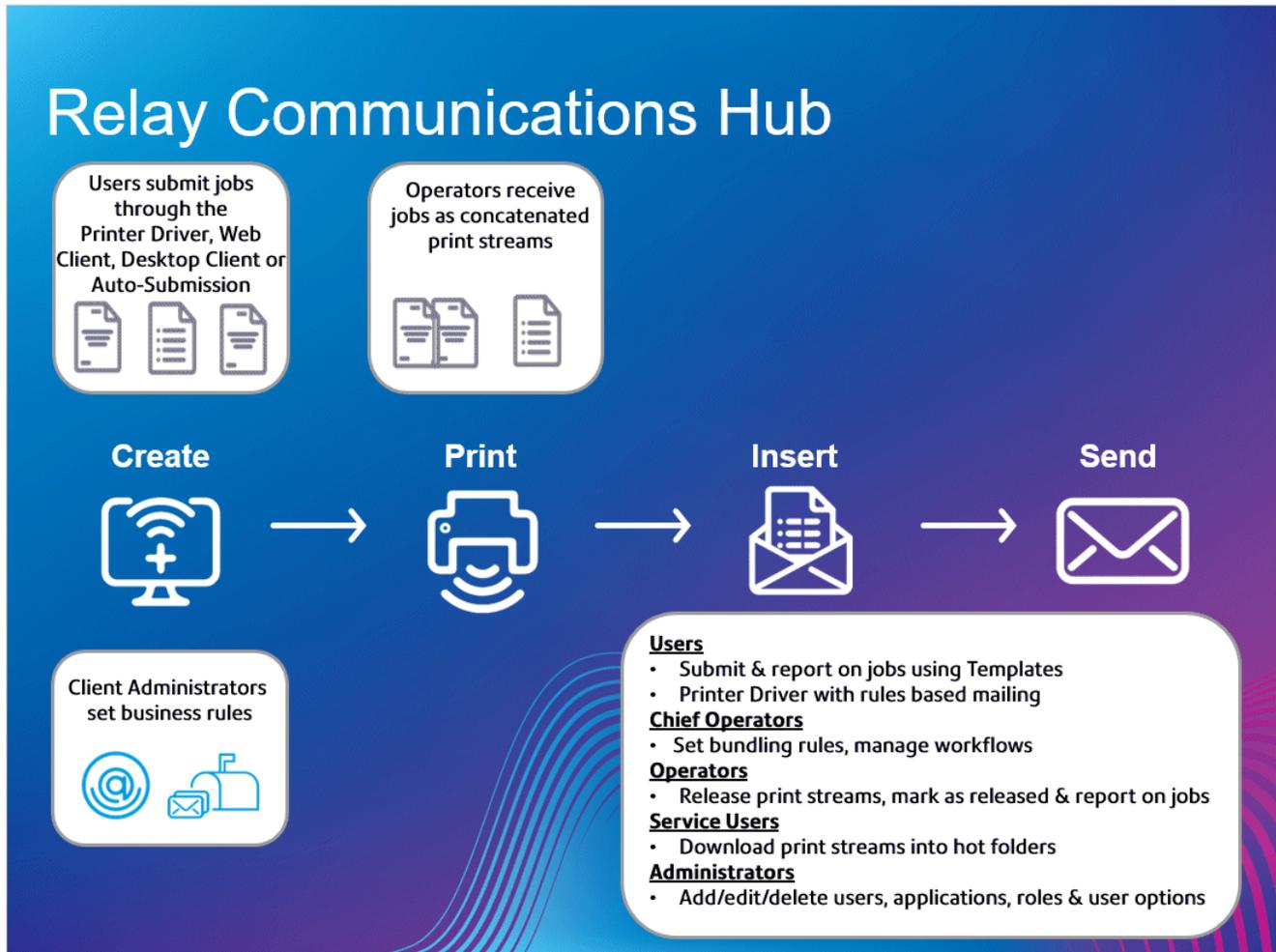
The following illustrates the flow of mail pieces through Relay Communications Hub.

Mail pieces

Users create mail pieces (the letters sent out to customers), which are individual documents or mail merged created in Microsoft Word and then:

- Submitted to Relay Communications Hub through the Printer Driver
- PDFed and uploaded to Relay Communications Hub through the Printer Driver or an auto submission hot-folder

This Microsoft Word Document or PDF is known as a job.

Jobs	A mail merged Microsoft Word or PDF file containing multiple mail pieces.

Print streams

Print streams are the jobs submitted by users concatenated, or grouped by common attributes, such as paper size, envelope size, color printing. Chief operators create bundles which define these common attributes and as each job reaches Relay Communications Hub it is added to the print stream matching attributes. The Chief Operator sets triggers for each print stream, specifying the criteria at which print streams are automatically released for download to hot folders, or if configured, printers.

Operators are responsible for loading the required paper on to the printers and the envelopes and inserts into the inserts. They oversee the printing and mailing of the print streams and then mark them as printed in the **Released Print Streams** page of Relay Communications Hub. This print confirmation is shown in the user's **Job Reports** page, so that they can see that their job is complete.

Bundles

A bundle is a group of attributes which define a print stream, for example, color, page size. The name of the bundle is automatically generated when the bundle is created and is made up of the attributes selected. For example:

C5, Duplex, Black & White, A4, 2nd Class, No Insert

This bundle has grouped together all jobs which are to be printed double-sided (duplex), on A4 paper and to be posted in a C5 envelope as 2nd class without the inclusion of pre-printed inserts.

See the **glossary** for help on the terms used in this guide.

Relay Communications Hub roles

There are five types of role:

See the **glossary** for help on the terms used in this guide.

Users

Submit their jobs to Relay Communications Hub through one of the following methods:

- printing a job through the Printer Driver
- merging more than one job when printing through the Printer Driver
- creating a job in the Web Client
- dragging and dropping a job into a hot folder provided by the Desktop Client

Operators

Undertake the following tasks:

- Drag and drop or automate the transfer of concatenated print streams from a download folder onto their printer(s). (This is the primary action. The operator will manually release print streams by exception)
- manually release print streams to download
- physically load and set printers and inserters
- oversee printing and mailing
- mark jobs as printed and mailed
- deleting jobs
- deleting jobs from printstreams
- deleting "Other" bundles

Chief Operators

Undertake the following tasks:

- define bundles by setting criteria by which jobs from all submitting users are concatenated into a single print stream
- define bundle triggers which will automatically release print streams for download to a printer when they reach a maximum number of pages or at specified time of day

This document has been created with both kinds of Operator in mind, the functionality in each section states the intended operator type.

See the **glossary** for help on the terms used in this guide.

Service User

There is only one Service User, who is named during the establishment of your Relay Communications Hub system. The Service User may hold an additional role, this is most likely to be Chief Operator or Operator.

Undertake the following tasks:

- Download the Desktop Client
- Use the Relay Communications Hub desktop client's hot folders to automatically process files
- Downloads print streams though the Desktop Client.
- Create, upload and download a job
- View reports on completed jobs
- If a reprint is required for any downloaded printstream, the Service User can drop that PDF in to the corresponding workflow folder in \Upload, the PDF is then considered to be a new job.

Administrators

Undertake the following tasks:

- Create users and departments
- Define your organization by creating departments and assigning users
- Manage roles
- Manage access pools
- Manage authorization pools
- View your organization
- Manage attachments
- Manage sheet stock
- Manage communication types
- Manage Templates
- View reports on completed jobs
- Upload a data file to the Relay Communications Hub Client
- Apply a Template to that file
- Download the resulting PDF and related files
- View and download reports on completed jobs
- Manage user access
- Invite others to use Relay Communications Hub
- Download the Desktop Client
- Use the Desktop Client's hot folders to automatically process files
- Configure the Auto-submission Console
- Use the Auto-submission Console's hot folders to automatically process files
- Use the Auto-submission Console's hot folders to track failed jobs

The Administrator Function

You need to define roles for users and create access pools by which user access is allocated. Roles govern permission/access to Relay Clients, these are the Web Client and Desktop client. You can create appropriate roles and permissions where users need higher privileges. User passwords can only be changed through and Administrator.

See:

- **Managing Roles** on page 29
- **Defining Access Pools** on page 34
- **#unique_28**

Your users will be submitting jobs to the Print Manager using the Printer Driver. You need to manage the sheet stock, attachments and communication types available to them for selection in the Printer Driver.

See:

- **#unique_29**
- **Managing Attachments** on page 47
- **Managing Sheet Stock** on page 51
- **Managing Communication Types** on page 56

You need to create an organization hierarchy by defining Departments and Users. This is done in the Relay Communications Hub Web Client.

See:

- **Defining Your Organization** on page 74

You need to create bundles and triggers in order to create Printstreams for use by print room operators.

See:

- **Managing Bundles and Triggers** on page 91

You can manage your account by adding money, editing you profile, opening the pitney Bowes web site and signing out of Relay Communications Hub.

See:

- **Administrating Relay Communications Hub** on page 105

You can install further clients for your users.

See:

- **Desktop Client** on page 113

- **Auto-Submission Console** on page 125
- **Printer Driver Installation** on page 146

Once the Print Manager is running, you can create reports on all aspects of the jobs processed.

See:

- **Viewing Job Reports** on page 155

3 - Getting Started

The **User Admin** tab provides tools required for creating Access and Authorization roles, which will specify which groups of users have access to which parts of Relay Communications Hub and which Users are able to Authorize the work of others.

In this section

Recommended Browsers

The following browsers are recommended for use with Relay Communications Hub:

- Mozilla Firefox
- Google Chrome

In addition, Relay Communications Hub is supported on Microsoft Internet Explorer 11 - with disabling of TLS 1.1 and above.

Signing In For The First Time

All users receive an automatically generated email, shown below:
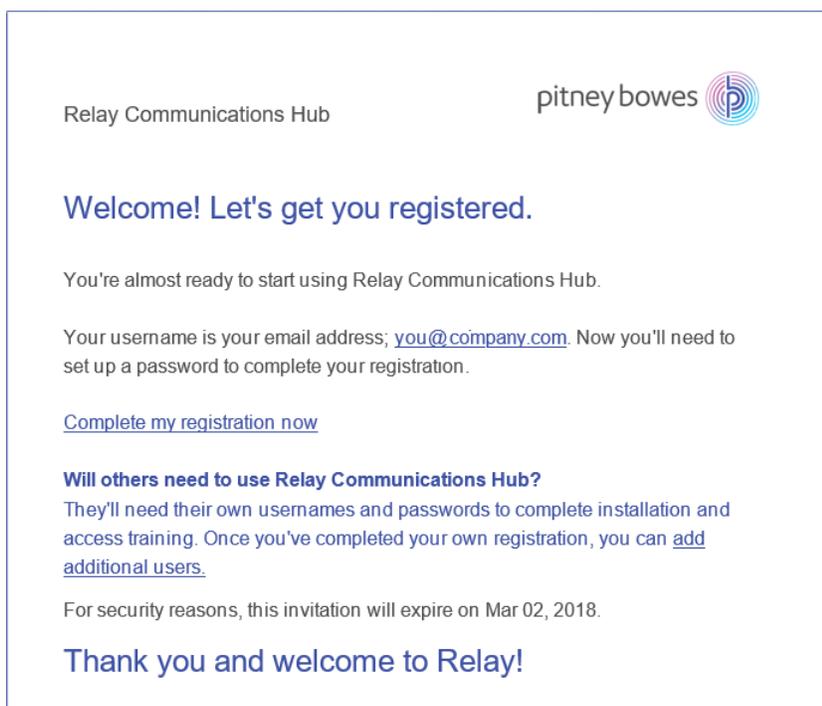
You need to complete the procedure below, to complete registration and set a password for your account.

The email contains a link, , which takes them to the Relay Communications Hub website.

They then need to create and confirm a password, as described in **Forgotten your password?** on page 25

A message is displayed confirming successful registration and the user is shown in the **Users** page with a status of Active.

1. In the above email, click the link "Complete my registration now".

   This opens the website, shown below:

2. Type in the **Password** you wish to use for this account.

   Your password needs to have the following:

   • at least eight characters
   • at least one upper-case letter
   • at least one lower-case letter
   • at least one number
   • at least one special character, such as @ # $ _

   We strongly recommend that you do not use your personal information, for example, your name, user name, address, your company's name, date of birth, phone number, license plate number.

3. Type in the password in **Confirm Password**.
4. Click **Complete My Registration**.

The website opens, displaying the areas to which you are allow access.

You only need to do this once, see **Subsequent Signing In** on page 24

Subsequent Signing In

You will be provided with credentials with which you can sign into both the User website by Pitney Bowes.

To sign in to follow the procedure below:

1. In the address bar type the URL of the Relay Communications Hub. This is one of the following:

   Europe: **https://relayhub.eu.pitneybowes.com/**

   North American & Australia: **https://relayhub.us.pitneybowes.com/**

   This opens the website in a new tab. The **Sign in** page is displayed.
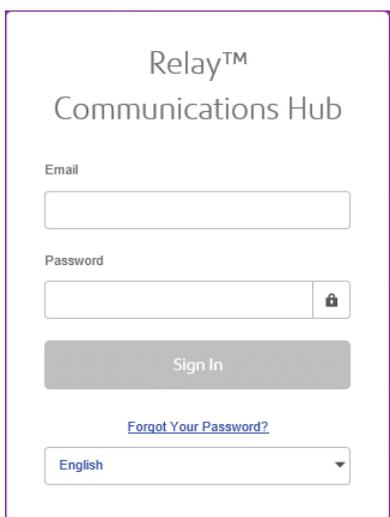
2. Type in your user credentials. By default this is your email address and a default password of "password".

   Warning: It is of the utmost importance that you change your password to something more secure as soon as possible. You risk attack by outside agencies if you fail to do so.

3. In addition, you may check the **Remember me** box. This means that if you close the browser without logging out, and open it again within seven days, your user name and password are remembered and you will not need to sign in.

   Note:

   After six incorrect sign in attempts you are locked out of the website for ten minutes. After this time, use the **Forgotten your password** facility to reset your sign in credentials.

4. Click **Sign in**.

The **Relay Communication Hub User web site** is then displayed.

Forgotten your password?

The sign in page is shown below:
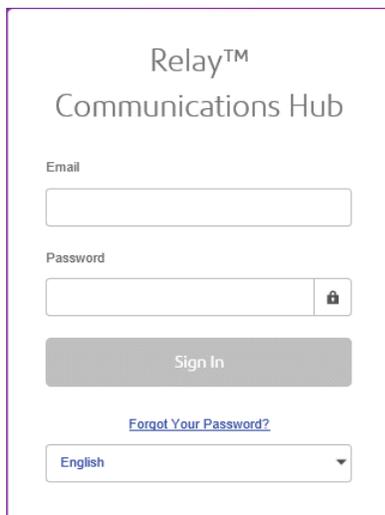
If you have forgotten your password, follow the procedure below:

1. Click **Forgotten Your Password?**

    This opens the following:
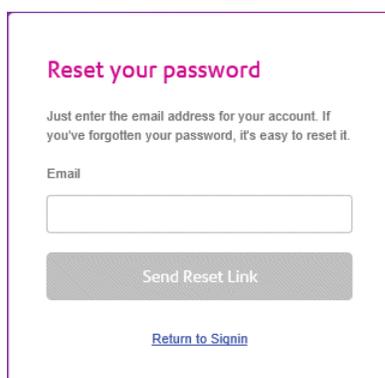
2. Type in your registered email address.
3. Click **Send Reset Link**.

    A message is displayed advising that en email link has been sent.

4. Check your email.

The reset password email is shown below:
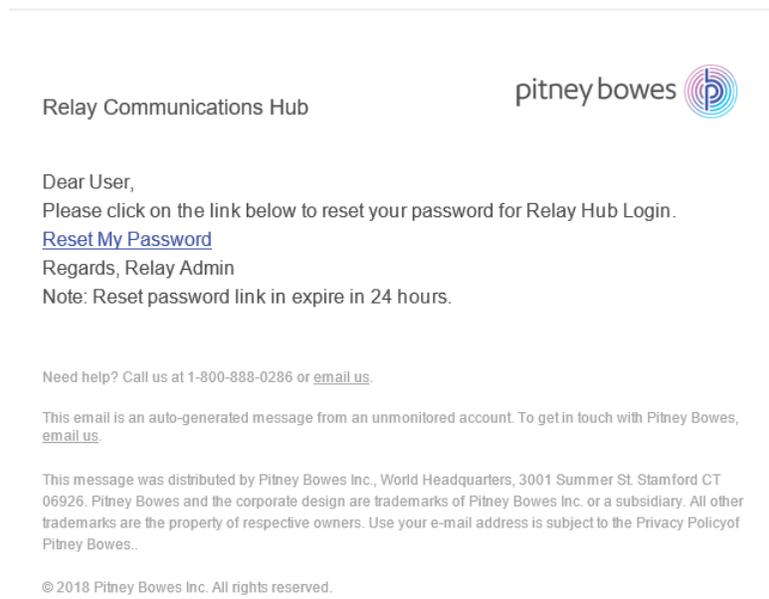
5. In the email click **Reset My Password**.

    The following is opened:

> **Note:** For security reasons, you cannot use any of your last five passwords.

> **Note:** See for a list of password criteria.

6. Type in your **New Password**.
7. Type in the same value for **Confirm Password**.
8. Click **Submit**.

Your password is changed and you are taken to the **Sign In** page.

Password Expiry

A password expiration policy may have been set by your system administrator, it defines the number of days after which your password will expire in addition to the number of days before expiration on which you will begin to be notified that this will happen.

The notification is shown as a banner across the top of the window once you have signed in.

1. Either click:

   • **Change Later** to continue with the sign in and open the website or
   • **Change Now** to continue as follows:

   If you clicked **Change Now**, the following is opened:

2. Complete the field as shown.
3. Click **Submit**.

If you choose not to change your password when the notification appears, then it is shown every time you attempt a sign in until the password is reset. If you have not reset your password before it expires, you are taken to the **Reset your password** dialog as soon as you attempt to sign in.

If you are using the Desktop Client you will receive an email notification if your password expires. In addition, an email is sent to your manager.

4 - Managing Roles

Roles manage user rights and permissions within the Relay Communications Hub organization. This page gives you the facility to create and then manage roles by first defining basic and then advanced permissions.

The **Departments** page is the first page shown when the **User Admin** tab is opened; click **Roles** in the ribbon to open the page: it consists of a Management area in which to specify the name of a role to edit or a new role to create. The Basic Permissions area allows you to define the fundamental permissions for that role. You will notice that a default role is already selected and cannot be deselected; this is because without this function a role would have no practical use. Finally, the Advanced Permissions area lists the Mailing Envelopes, Stock, Attachments and Mailing Services previously configured in the **Configuration** tab, each one described earlier in this document.

One role has been configured for you:

PI-OFMA-DEFAULT

This role is automatically available to a user when the user is allocated to a position. It provides basic rights to Relay Communications Hub Print Driver users. The default can be updated in the Management area of the **Roles** page.

Appendix C: Predefined Roles lists the Roles that have been preconfigured for you.

In this section

Editing a default Role

We recommend that you begin by editing the default role, and therefore, the standard default services for all users. Only then should you attempt to create a new role.

To edit a default role, follow the procedure, below:

1. From the **Role to Manage** list select the required Role.
2. Click a permissions category to display its contents. The categories are:

   • Basic Permissions
   • Mailing Envelopes
   • Sheet Stocks
   • Mailing Services
   • Attachments
   • Communication Types

3. Do one of the following:
   a) Check the box adjacent to the required item.
   b) Hold **Shift** and check the boxes adjacent to all required items.
   c) Check the box in the header row to select all.

4. Repeat the previous set to select permissions for Mailing Envelopes, Mailing Services, Attachments and Communication Types, as required.
5. Once you have added all of the required permissions click **Update**.
6. Click **Cancel** to return to the **Roles** page.

The new information is now shown in the table.

Adding a Role

Roles can be created in one of two ways. The first is to create a basic role, specifying only **Basic Permissions** and then add other permissions to the Role as they are created, for example, once you add and **Attachments**, **Sheet Stock** or **Communications Type**, etc, this may be added to the Role immediately. The second depends on Attachments, Sheet Stock, Communications Type, etc, already having been created.

Available permissions are listed in six categories:

• Basic Permissions
• Mailing Envelopes

- Sheet Stocks
- Mailing Services
- Attachments
- Communication Types

Click any of these headings in the **Roles** page to expand it, you may then select the items required from each.

Adding a basic role

This procedure describes the steps for creating a basic role with only basic permissions. It is assumed that you will add Mailing Envelopes, Sheet Stocks, Mailing Services, Attachments and/or Communication Types once you have created them in the **Configuration** tab. The procedures for doing this are described in the Configuration Quick Start Guide.

To add a basic role, follow the procedure below:

1. From the **Roles to Manage** list select **New Role**.

2. In **Role Name** type a name for this **Role** and click **Add**.

   We recommend that you use something meaningful, for example, the function of the Role. The **Role Name** field accepts only letters, numbers, hyphens and underscores.

3. Select the new role's name from the **Roles to Manage**.

4. Click on the **Basic Permissions** box, shown below, to expand it.

5. Check the box adjacent to the required item, for example, Color.

6. Click **Update**.

7. Click **Cancel** to return to the **Roles** page.

Warning: This Role must now be allocated in **Access Pools**.

You can add permissions to a role at any time by selecting required items from the different categories and clicking **Update** to complete the operation.

Adding a full role

This procedure describes the steps for creating a role with all permissions set. It is assumed that the required Mailing Envelopes, Sheet Stocks, Mailing Services, Attachments and/or Communication Types have already been created in the **Configuration** tab. The procedures for doing this are described in the Configuration Quick Start Guide.

To add a full role, follow the procedure below:

1. From the **Roles to Manage** list select **New Role**.

2. In **Role Name** type a name for this **Role** and click **Add**.

   We recommend that you use something meaningful, for example, the function of the Role. The **Role Name** field accepts only letters, numbers, hyphens and underscores.

3. Select the new role's name from the **Roles to Manage**.

4. Click on the **Basic Permissions** box, shown below, to expand it.

5. Check the box adjacent to the required item, for example, Color.

6. Click **Sheet Stocks** to display the list of those available.
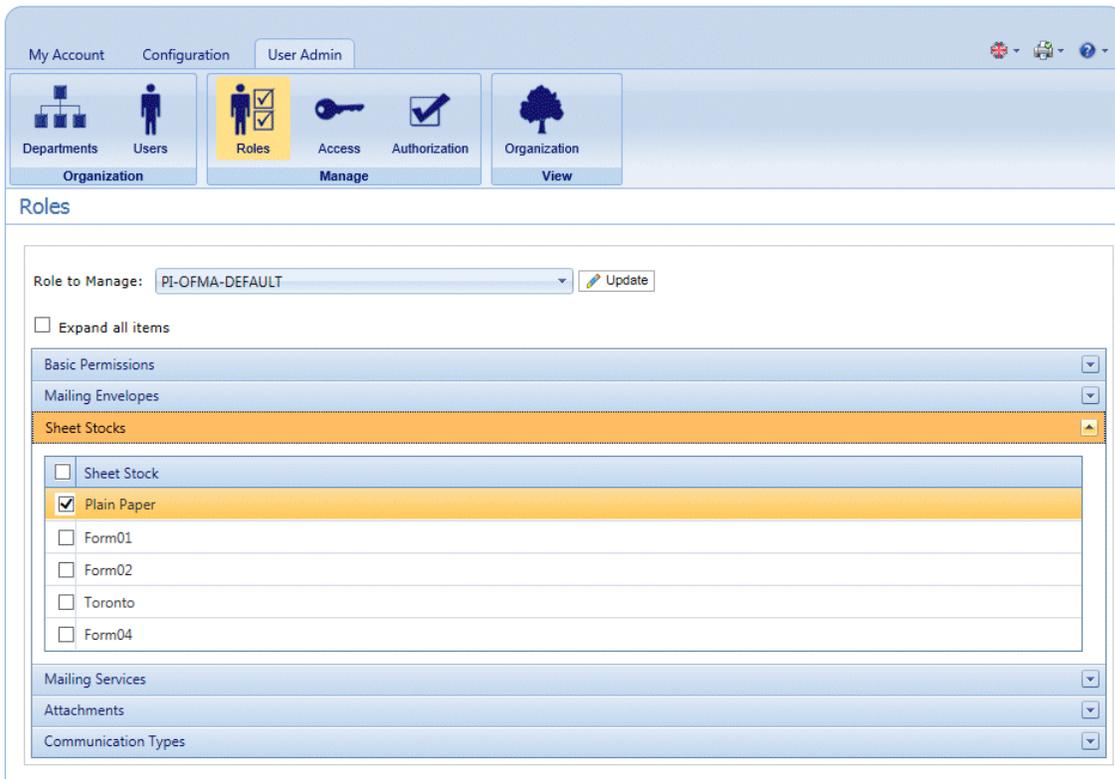
7. Do one of the following:

   a) Check the box adjacent to the required item.

   b) Hold **Shift** and check the boxes adjacent to all required items.

   c) Check the box in the header row to select all.

8. Repeat the previous set to select permissions for **Mailing Envelopes**, **Mailing Services**, **Attachments** and **Communication Types**, as required.

9. Once you have added all of the required permissions click **Update**.

10. Click **Cancel** to return to the **Roles** page.

Warning: This Role must now be allocated in **Access Pools**.

You can add permissions to a role at any time by selecting required items from the different categories and clicking **Update** to complete the operation.

5 - Defining Access Pools

This chapter describes the processes of editing the default Access Pool and adding a new Access Pool, these enable you to manage user privileges by groups of user. User privileges are defined by roles; these roles are added to groups (Access Pools). By adding users to the group you define their roles. For example, if we create a System Admin Group and assign the PI-OFMA-DRIVER-PREVIEW-EDIT and PI-OFMA-ELECTRONIC-ATTACHMENT-ACCESS roles to it, all users in the group automatically get the role to allow them to use the preview panel of the Printer Driver and electronic attachments.

An Access Pool may contain many users and many roles. A user may belong to many Access Pools and the same is true of roles. However, Access Pools can only contain roles and users; the nesting of Access Pools is not possible.

> **Note:** Departments, users and roles must already have been defined in order to create Access Pools.

In this section

Editing an Access Pool

We recommend that you begin by editing the Default Access Pool. Only then should you attempt to create a new access pool.

To edit information shown in a table, follow the procedure, below:

1. Ensure you are in the **Access Pools** page of the **User Admin** tab.
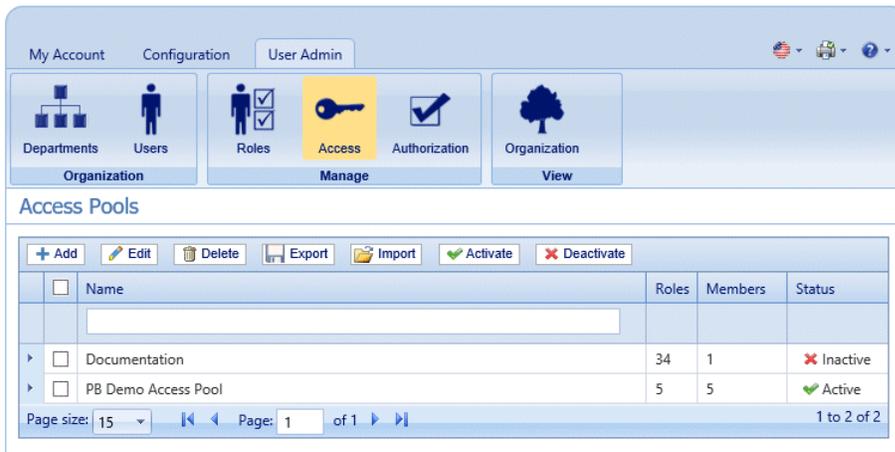
2. Select the **Default Access Pool**.
3. Click **Edit**.
4. A window is opened containing the fields required.

   The **Access Pool Details** page is opened, shown below:

If you wish, you may amend the **Access Pool Name** by editing the text in the box and clicking **Update**.

5. In the **Roles** tab click **Add** to open the following:

The text box underneath the **Role Name** column heading allows you to search the list of roles by entering text and pressing **Enter**. For example, type Admin to display only the roles with that text string in their name.

Scroll through the roles by clicking the arrows at the bottom of the window.

See **Predefined roles** for a description of each one.

6. Place a check mark in the box adjacent to the required roles.
7. Click **Add selected roles**.

There are then added to the access pool.

8. Click **Close** to return to the **Access Pools Details** page.

The added roles appear in the table.

9. Open the **Members** tab.

   The current members of the pool are shown in the table.

10. Click **Add**. The **Search and select users** window is displayed, shown next.

   Select the Department from those listed to display only users working in that department or type in the Department name and click to search for the users in the specific department.

   The text box underneath the column heading allows you to search the list of users by entering text and pressing <**Enter**>. For example, type Green in the **Last Name** column to show only the users with that text string in their name.

   Scroll through the roles by clicking the arrows at the bottom of the window.

11. Place a check mark in the box adjacent to the required roles.
12. Click **Add selected roles**. There are then added to the access pool.
13. Click **Close** to return to the **Access Pools Details** page. The added roles appear in the table.
14. Click **Update** and **Close** to return to the **Access Pools** page.
15. The Access Pools table is updated with the new pool information, showing its name, the number of roles and users. If the status of the Access Pool is Inactive. Click **Activate.**

Warning:

Ensure that access pool is activated, if it is not it cannot be used.

The access pool is now complete and in use. The users specified in the pool have the roles, or user privileges, define in the same pool.

   Note:

   You may deactivate a pool any time by selecting the one required and clicking **Deactivate**, it then appears in the table as Inactive.

You may prefer to deactivate a pool rather than deleting it. It is far easier to reactivate a pool than it is to recreate it.

Adding Access Pools

To create a new Access Pool, follow the procedure below:

1. In **Access Pools** click **Add**. The following is opened:

2. Type in a name for this **Access Pool** and click **Add**. We recommend that you use something meaningful, for example, a function of the group.

    The **Access Pool Details** page is opened, shown below:

    If you wish, you may amend the Access Pool Name by editing the text in the box and clicking **Update**.

3. In the **Roles** tab click **Add** to open the following:

    The text box underneath the **Role Name** column heading allows you to search the list of roles by entering text and pressing **Enter**. For example, type Admin to display only the roles with that text string in their name.

Scroll through the roles by clicking the arrows at the bottom of the window.

See **Predefined roles** for a description of each one.

4. Place a check mark in the box adjacent to the required roles.

5. Click **Add selected roles**.

    There are then added to the Access Pool.

6. Click **Close** to return to the **Access Pools Details** page.

    The added roles appear in the table.

7. Open the **Members** tab.

    The current members of the pool are shown in the table.

8. Click **Add**. The **Search and select users** window is displayed, shown next.

Select the Department from those listed to display only users working in that department or type in the Department name and click 🔍 to search for the users in the specific department.

The text box underneath the column heading allows you to search the list of users by entering text and pressing <**Enter**>. For example, type Green in the **Last Name** column to show only the users with that text string in their name.

Scroll through the roles by clicking the arrows at the bottom of the window.

9. Place a check mark in the box adjacent to the required roles.
10. Click **Add selected roles**. There are then added to the Access Pool.
11. Click **Close** to return to the **Access Pools Details** page. The added roles appear in the table.
12. Click **Close** to return to the **Access Pools** page.
13. The Access Pools table is updated with the new pool information, showing its name, the number of roles and users. The status of the Access Pool is inactive. Click **Activate.**

Warning:

Ensure that new Access Pool is activated, if it is not it cannot be used.

The new Access Pool is now complete and in use. The users specified in the pool have the roles, or user privileges, define in the same pool.

>   **Note:**
>
>   You may deactivate a pool any time by selecting the one required and clicking **Deactivate**, it then appears in the table as Inactive.
>
>   You may prefer to deactivate a pool rather than deleting it. It is far easier to reactivate a pool than it is to recreate it.

Deleting Access Pools

To delete an Access Pools shown in a table, follow the procedure, below:

1. Ensure you are in the **Roles** page of the **User Admin** tab.
2. In the table, do one of the following:
   a) Check the box adjacent to the required item.
   b) Hold **Shift** and check the boxes adjacent to all required items.
   c) Check the box in the header row to select all.
3. Click **Delete**.
4. A window is then presented requiring confirmation of the deletion. Click **OK**.

The item(s) are removed from the table and are no longer available in Relay Communications Hub; they cannot be reinstated, but must be recreated.

6 - Defining Authorization Pools

Note:

This section is only relevant to Mailstream on Demand users.

The functionality described in this chapter may not be available to all Relay Communications Hub Users where they send print streams to a centralized mail room.

Authorization Pools determine which users have the authority to authorize other users' documents. The pools allow the use of privileged resources such as color printing to be controlled and approved. In addition, pools provide a means for defining a mechanism for supervisory review of documents before they are submitted for printing. The review may not need to be undertaken by a supervisor, but by a peer.

Authorization Pools define who can authorize work, Authorizers, and the users who require their work to be reviewed, regardless of their department or position in the organization. Authorizers and those authorized can belong to more than one Authorization Pool, however an Authorizer cannot be a member in the same group. Authorizers do not have the ability to authorize their own work.

In this section

Adding an Authorization Pool

To create a new Authorization Pool, follow the procedure below:

1. Ensure you are in the **Authorization Pools** page of the **User Admin** tab.
2. Click **Add**.

   The following is opened:

Add New Authorisation Pool

   *Authorisation Pool Name: [   ] + Add ✖ Cancel

3. Type an **Authorization Pool Name** and click **Add**. We recommend that you use something meaningful, for example, a team name or a function of the group.

   The **Authorization Pool Details** page is opened, shown below:

   Authorization Pool Details

   *Authorization Pool Name: ProgramMan   ✐ Update ✖ Cancel

Authorizers	Members

   + Add   🗑 Delete

User Name	First Name	Last Name	Department	🔑	📖

   No records to display.
   Page size: 15 ▾   Page: 1 of 1

   ✖ Close

   The **Authorization Pool Details** table has the following icons:

   🔑 The maximum authorization level held by the user. A red hand in this column indicates that no maximum has been set.

   See **Managing Roles** on page 29 to add an authorization role specifying the authorization level.

   📖 If checked the authorizer is warned/emailed when documents require a higher authorization level than permitted by the pool or users have authorization required roles but do not belong to an authorization pool. This means that any documents requiring authorization submitted by the users are never authorized.

If you wish, you may amend the Authorization Pool Name by editing the text in the box and clicking **Update**.

4. Open the **Authorizers** tab, which lists existing authorizers of this Authorization Pool.

5. To add Authorizers click **Add** to open the following:
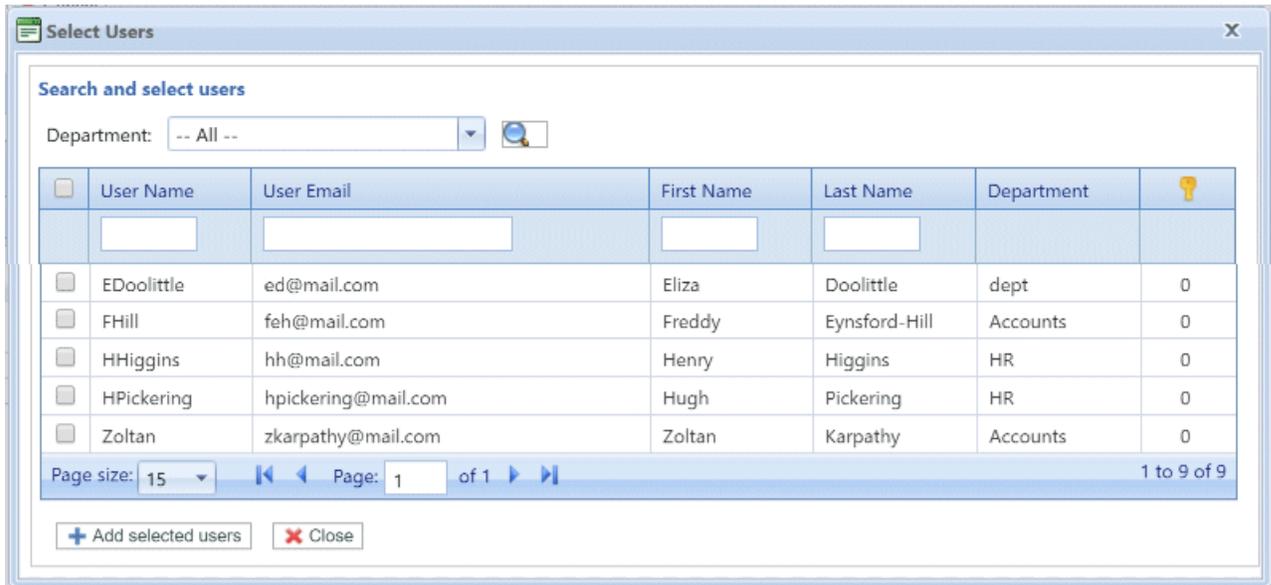
6. Select the **Department** from those listed to display only users working in that department or type in the **Department** name and click 🔍 to search for the users in the specific department.

7. Place a check mark in the boxes of the required users and click **Add selected users**.

   Users may be filtered using the text boxes beneath the column heading.

8. Open the **Members** tab, which lists existing members of this Authorization Pool.

9. To add members to this Authorization Pool repeat step #5 through to step #7.

10. Click **Close** to return to the **Authorization Pools Details** page. The added roles appear in the table.

11. Click **Close** to return to the **Authorization Pools** page.

12. The Authorization Pools table is updated with the new pool information, showing its name, the number of authorizers and the number of users. The status of the Authorization Pool is Inactive. Click **Activate.**

Warning:

Ensure that new Authorization Pool is activated, if it is not it cannot be used.

The new Authorization Pool is now complete and in use. The users specified in the pool have the roles, or user privileges, define in the same pool.

> **Note:**
>
> The process of validating authorization pools establishes the following:

- All pools contain at least one Authorizer and one member.
- All Authorizers of an Authorization Pool hold an authorization level below or equal to that of the pool.
- All members of an Authorization Pool hold an authorization level below or equal to that of the pool.

A message is displayed in red text at the bottom of the page should any validation issues arise.

You may deactivate a pool any time by selecting the one required and clicking **Deactivate**, it then appears in the table as Inactive.

You may prefer to deactivate a pool rather than deleting it. It is far easier to reactivate a pool than it is to recreate it.

Editing an Authorization Pool

The process for editing is much the same as for adding Authorization Pool.

To edit information shown in a table, follow the procedure, below:

1. Ensure you are in the **Authorization Pools** page of the **User Admin** tab.
2. Click **Edit**.
3. A window is opened containing the fields required. Amend these as needed and click **Update**.

The new information is now shown in the table.

Warning: Ensure that new Authorization Pool is activated, if it is not it cannot be used.

Deleting Authorization Pools

To delete an Authorization Pool shown in a table, follow the procedure, below:

1. Ensure you are in the **Authorization Pool** page of the **User Admin** tab.
2. In the table, do one of the following:
   a) Check the box adjacent to the required item.
   b) Hold **Shift** and check the boxes adjacent to all required items.
   c) Check the box in the header row to select all.
3. Click **Delete**.
4. A window is then presented requiring confirmation of the deletion. Click **OK**.

The item(s) are removed from the table and are no longer available in Relay Communications Hub; they cannot be reinstated, but must be recreated.

7 - Managing Attachments

Attachments are electronic documents in PDF format which are "attached" to the mail pieces in your job. The Managing Attachments function gives you the tools to upload a PDF file you have already created to Relay Communication Hub, this is then available for selection from the Attachments option of the Printer Driver, depending on the roles and permissions of the user.

PDFs must be created with no security or encryption options. Save them in optimized format in Acrobat by opening the **File** menu,choosing the **Save as** and then **Optimized PDF**.

> **Note:** Attachments are electronic documents which differ from Pre-Printed Inserts, which are physical paper, probably leaflets or flyers, which need to be selected and placed in the envelope with the mail piece once the mail piece has been printed.

Display the page by opening the **Configuration** tab and clicking **Attachments**. The page contains a list of configured Attachments.

You may click **Refresh** or **Attachments** at any time to display the latest information.

In this section

Adding an Attachment

Attachments should be PDFs and saved as PDF optimized, by selecting the option from the **File | Save as** menu in Acrobat. The following levels are supported:

- Acrobat 4.0 (PDF 1.3)
- Acrobat 5.0 (PDF 1.4)
- Acrobat 6.0 (PDF 1.5)
- Acrobat 7.0 (PDF 1.6)

The PDFs must have been created without any security restrictions, please do not add any of the Document Security features offered by Acrobat.

Attachments must be the same physical/paper size as the document to which they will be attached. The maximum file size for an attachment is 10MB.

The number of pages in an attachment need to be even to ensure that the page count is not miscalculated. If the intended attachment is a single side, we recommend adding a back side.

To add a new attachment, follow the procedure below:

1. In the **Configuration** tab click **Attachments** to display the page.
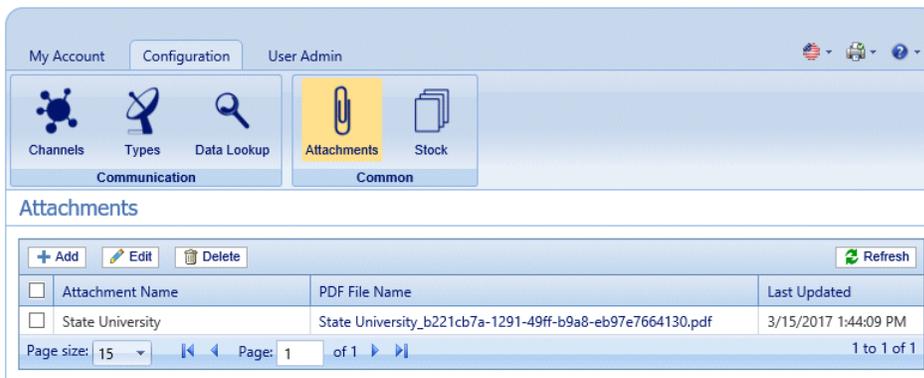
> **Note:** Once added, provided Adobe Reader is present on your PC, you can click on the PDF name to view the attachment.

2. In **Attachments** click **Add**.

3. In **Attachment Name** type a name by which to identify the file in the Printer Driver. This can be the same as the PDF file name.

4. In **PDF File Name** click **Select.**.

   This opens the **Choose File** dialog; use this to navigate to required PDF file.

5. Select the file and click **Open**.

6. Click **Add**.

   The new item is now shown in the table.

7. The new attachment needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.

8. Click the **Roles** tool to open that page.

   The **Roles** page is shown below:
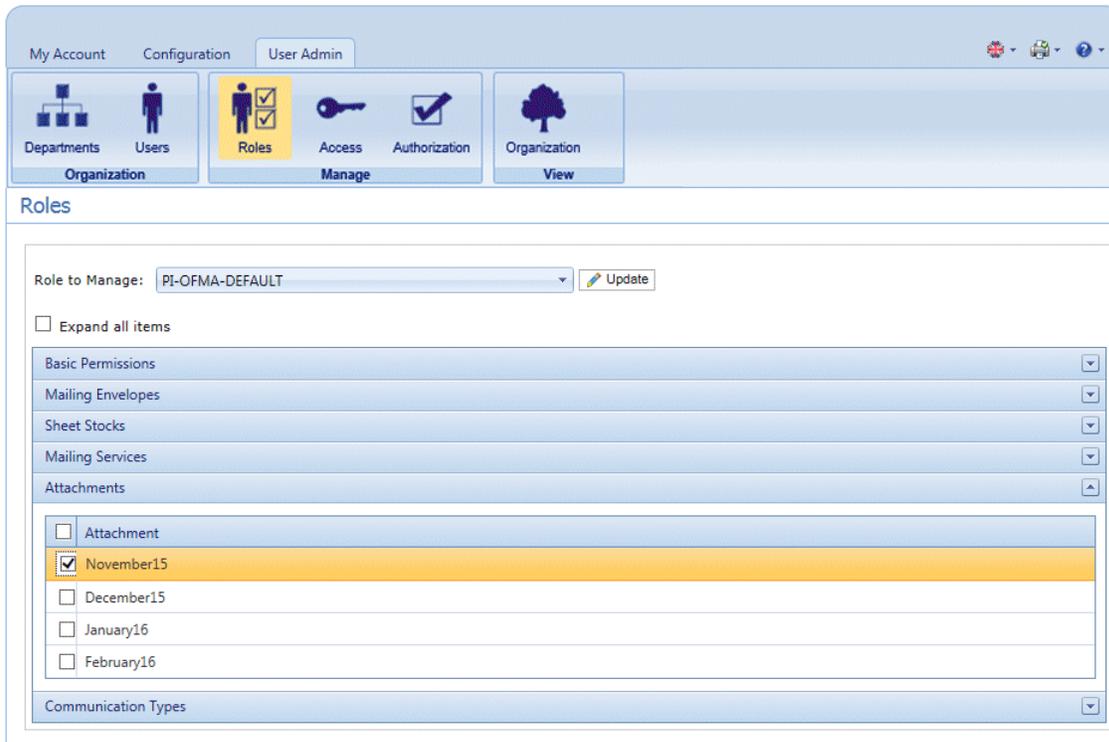
9. From **Role to Manage** select the correct role.

10. Click **Attachments** to open a list of those available.

11. Place a check mark in the box adjacent to the attachment(s) created earlier.

12. Click **Update**.

Warning:

Ensure that new attachment is added to the correct role. If it is not, it cannot be used.

Editing Attachments

To edit an attachment channel, follow the procedure, below:

1. Ensure you are in the correct page, click the **Attachments** tool to open the **Attachments** page.
2. Place a check mark in the box adjacent to the required item.

   This is then highlighted in the table.

3. Click **Edit**.

   A window is opened containing the fields required.

4. Modify the fields as required and click **Update**.

   Mandatory fields are marked with an asterisk*.

The updated item is now shown in the table.

Deleting Attachments

Note:

If you attempt to delete an attachments, a warning is displayed if the attachment is referenced by a Type. The message gives details of the Types associated with the attachment. An Attachment cannot be deleted while a Settings Group references it. To resolve this remove all Communication Type references for this Attachment.

To delete attachments, follow the procedure, below:

1. Ensure you are in the correct page, click the **Attachments** tool to open the **Attachments** page.
2. Do one of the following:
   a) Place a check mark in the box adjacent to the required item.
   b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
   c) Place a check marks in the box in the header table's to select all items.

   This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

8 - Managing Sheet Stock

Sheet stock (forms and overlays) are uploaded to the Relay Communication Hub Administration server. Once uploaded these files are available to Printer Driver users (dependent on their user permissions) as electronic forms. In addition, file details can be edited and the files removed from the server.

Display the page by opening the **Configuration** tab and clicking **Sheet Stock**. The page contains a list of configured stock.

You may click **Refresh** or **Stock** at any time to display the latest information.

In this section

Adding Sheet Stock

Note:

The Printer Driver treats Physical Stocks as double sided; therefore for Physical Stocks to be correct they must defined as two sided documents. If you are uploading a Physical Stock that has only one side, a second, blank side must be present within the file.

Sheet stock should be PDFs created in an optimized and transparency flattened format. The following levels are supported:

- Acrobat 4.0 (PDF 1.3)
- Acrobat 5.0 (PDF 1.4)
- Acrobat 6.0 (PDF 1.5)
- Acrobat 7.0 (PDF 1.6)

PDFs must not have any security restrictions.

We recommended that sheet stock has the same physical/paper size as the document with which they will be used. The maximum file size for sheet stock is 100MB.

Once added, provided Adobe Reader is present on your PC, you can click on the PDF name to view the sheet stock.

To add sheet stock, follow the procedure below:

1. In the **Configuration** tab click **Stock** to display the page; it contains a list of configured sheet stock.

Note: Once added, provided Adobe Reader is present on your PC, you can click on the PDF name to view the attachment.

2. In the **Sheet Stock** page click **Add**. The window is displayed.

3. In **Name** type a name by which to identify the file in the Printer Driver. This can be the same as the PDF file name.

4. In **Physical Stock** place a check mark in the box if the required stock to be inserted in the document when it is printed the sheet is pulled from a specific tray as the document passes through the printer.

5. In **PDF File Name** click **Select**.

6. In the **Choose File** dialog, navigate to and select the required PDF file.

7. From **Used on Sheet** select the required option from the following:

   • Sheet 1 only
   • Only the first sheet in the document.
   • Sheet n only
   • Not the first sheet but for all remaining sheets in the document.
   • All Sheets
   • All sheets in the document.

8. From **Side Assignment** select the required option.

Overlay printed on Front; only allow User to print Simplex	The overlay is printed on the front sides only. The user can print this document in single sided mode only.
Overlay printed on Front; User can print Duplex	The overlay is printed on the front sides only. This document can be printed single or double sided.
Overlay printed on Back; only allow User to print Simplex	The overlay is printed on the back sides only. This document can be printed single sided only.
Overlay printed on Back; User can print Duplex	The overlay is printed on the back sides only. This document can be printed single or double sided.
Overlay printed on both sides; only allow User to print Simplex	The overlay is printed on the both sides. This document can be printed single sided only.
Overlay is double sided; only allow User to print Simplex	The overlay is double sided. This document can be printed single sided only.
Overlay is double sided; User can print Duplex	The overlay is double sided. This document can be printed single or double sided.
	Note: This is the only option available if Physical Stock has been selected.

Warning: If the overlay chosen states that it is double-sided, it must be used only for double-sided (duplex) printing. Likewise, if the overlay chosen states that it is single-sided, it must be used only for single-sided (simplex) printing. Attempting to print a double-sided overlay when the printing option for your job is single-sided, or to print a single-sided overlay when the printing option for your job is double-sided in the Relay Communication Hub or Printer Driver will cause the job to fail.

9. Click **Add**.

    The new item is now shown in the table.

10. The new stock needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.

11. Click the **Roles** tool to open that page.

    The **Roles** page is shown below:
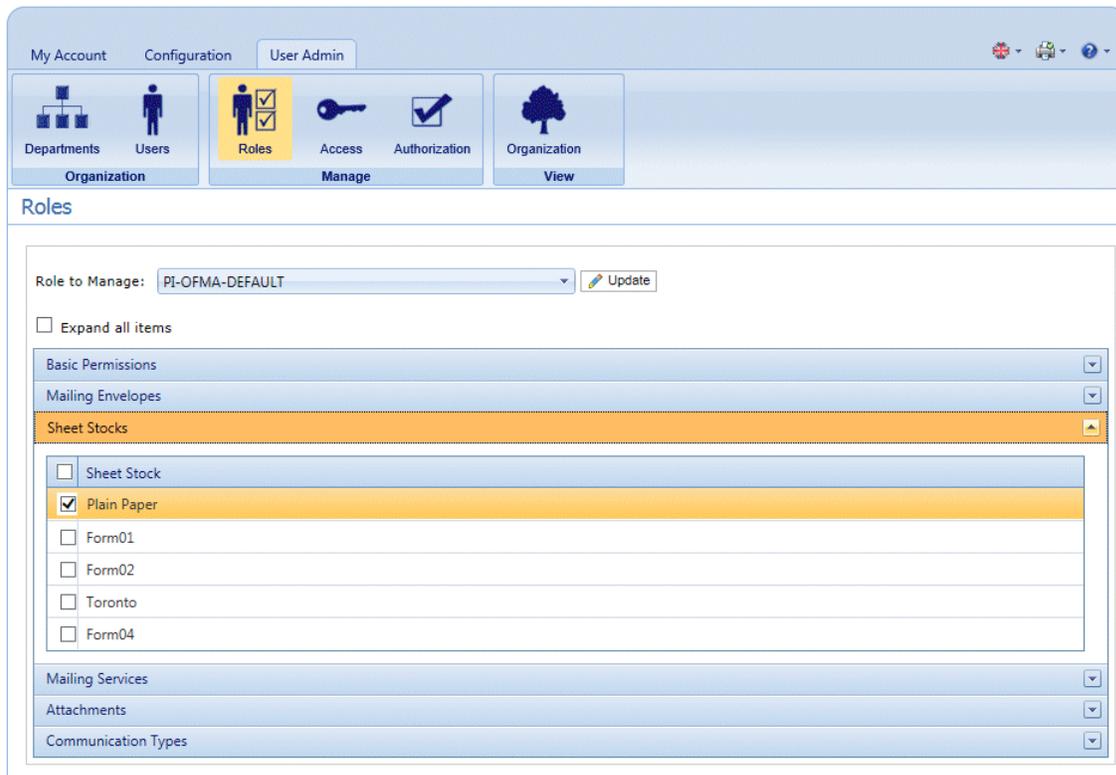
12. From **Role to Manage** select the correct role.

13. Click **Sheet Stock** to open a list of those available.

14. Place a check mark in the box adjacent to the attachment(s) created earlier.

15. Click **Update**.

Warning: Ensure that new sheet stock is added to the correct role. If it is not, it cannot be used.

Editing Stock

To edit stock, follow the procedure, below:

1. Ensure you are in the correct page, click the **Stock** icon in the ribbon to open the **Stock** page.

2. Place a check mark in the box adjacent to the required item.

   This is then highlighted in the table.

3. Click **Edit**.

   A window is opened containing the fields required.

4. Modify the fields as required and click **Update**.

   Mandatory fields are marked with an asterisk*.

The updated item is now shown in the table.

Deleting Stock

To delete stock, follow the procedure, below:

1. Ensure you are in the correct page, click the **Stock** icon in the ribbon to open the **Stock** page.
2. Do one of the following:
   a) Place a check mark in the box adjacent to the required item.
   b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
   c) Place a check marks in the box in the header table's to select all items.

   This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

9 - Managing Communication Types

Communication types are used in the Relay Communication Hub Printer Driver to group options available. These settings are matched to jobs with similar settings; the Communication types overrides the remaining settings in the job, acting as a default of predefined criteria on which to print the job.

Use Communication Types to split pages, move text blocks, extract reference fields, automate email sending and enforce mailing options, for example, the document overrides the selections made by the user.

Your Pitney Bowes Administrator will have preconfigured your postal classes, envelope types and range of physical inserts. Please contact your Pitney Bowes Administrator to make future changes.

Display the page by opening the **Configuration** tab and clicking **Types**. The page contains a list of configured Communication Types.

You may click **Refresh** or **Types** at any time to display the latest information.

In this section

Setting search criteria

The search criteria may be a string of alphanumeric characters, for example, a word, which exists within the mail piece or it may be inserted; whichever you use, they must appear in the same position in each mail piece. The search criteria may be in white text so that they appear only to the software and are invisible to the mail piece recipient. These search criteria begin the process specified by the Communication Type, for example, splitting pages, defining the mailing class, whether the document is printed in color, the envelope size, an overlay, an insert or to move the address block.

Error messages are displayed if a search criteria fails for any reason, for example if the alphanumeric string used as a search criteria is moved and cannot be found by the software or there are too many pages to fit in the selected envelope. An example is shown below:

Note:

- We strongly recommend that you use different search criteria different, for example, Monthly Invoice and Weekly Invoice, rather than Invoice 1, Invoice 2. This is to avoid Relay Communication Hub selecting the first letters or word of the search criteria. Further, We

strongly recommend that you use the Order Number to allow prioritization of which search criteria to find first.

- Including the search criteria within the header or footer minimizes the risk of failure as they are unaffected by content movement in the body of the document.
- Using white text for the search criteria ensures it is not visible on the printed document.

Measuring the position of the search criteria

The procedure below describes how to find the position of the Search criteria text on the first page of a mail piece. In the example, the Search criteria is a document reference appearing in the bottom left hand side of the first page of each mail piece, as shown below. This is used to find the first page of a mail piece. When in the Printer Driver, the user is able to scroll through the document in the Preview panel to see all the mail pieces within the document.

Once the position is found, it can be used when adding Search Criteria during **Adding Communication Types**.

Note:

- If this text is moved the search criteria cannot be found and an error is displayed in the Printer Driver when an attempt is made to use this Communication Type.
- This process must be completed for each new document search criteria/Communication Type created.

1. Print the page of the document on which the search criteria appears. In this example, it is the first page of each mail piece. You need only print one, as the search criteria should appear in the same position on the front page of each mail piece.

2. Using the printed page, measure the distance in millimeters from the left hand edge of the page to the beginning of the search criteria text. This is the **Top Left X** measurement, keep it to hand.

3. Measure the distance in millimeters from the top edge of the page to the top of the search criteria text. This is the **Top Left Y** measurement, keep it to hand. This and Top Left X give the x,y co-ordinates of a point on the page. The Height and Width measurements describe a box surrounding the search criteria text.

4. Measure the height in millimeters of the search criteria text. This is the **Height** measurement, keep it to hand.

5. Measure the width in millimeters of the search criteria text. This is the **Width** measurement, keep it to hand. The diagram, below, illustrates where the two measurements should be taken:
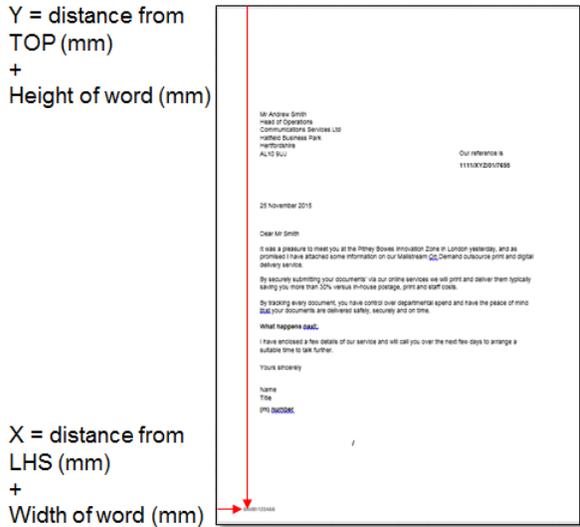
Use these measurements when adding Search Criteria during **Adding Communication Types**.

Enforcing options

You can use search criteria to enforce options, use the procedure given in **Adding Communication Types.**

Checking these enforces the options, which prohibits changes within the Printer Driver. However, adding them here but not enforcing them allows some editing in the Printer Driver.

Leaving options unenforced presents them as the default in the Printer Driver, the user can then override them, depending on their Roles and Permissions.

To enforce one or all options, follow the procedure, below:

1. Place a check mark in the box adjacent to the required Communication Type.

   This is then highlighted in the table.

2. Click **Edit**.

Any of the options, shown below, with a 🔓 can be enforced.

3. Either:

   • Click in the box adjacent to the option you need.
   • Click **Enforce All** to select all options.

   The icon changes to 🔒

4. Click **Edit**.

5. Place a check mark in the boxes adjacent to the options you wish to enforce or click **Enforce All**.

6. Click **Update** in **Job Options** and in **Edit Communication Type**.

Warning:

Ensure you remember to click **Update**, otherwise your changes are not saved.

Copying Communication Types

You may find it easier, as a first step to create a copy of an existing Communication Type rather than creating one in full. If you do create a copy, you must then edit it, ensuring that you make it unique and give it a unique name.

To copy a Communication type, follow the procedure, below:

1. Ensure you are in the correct page, click the **Types** tool to open the **Communication Types** page.

2. Place a check mark in the box adjacent to the required item.

   This is then highlighted in the table.

3. Click **Copy**.

The copied item is now shown in the table. This will need to be edited to make it different from the original. There is no point in having two Communication Types that are exactly the same.

We strongly recommend that, if the copied Communication Type is very similar to the original, change the Order Number so that the system checks the Types in your preferred order.

Warning:

You must now edit the copied Communication Type, ensuring that you make it unique and give it a unique name.

Editing Communication Types

To edit a type, follow the procedure, below:

1. Ensure you are in the correct page, click the **Types** tool to open the **Communication Types** page.

2. Click to open the required heading, for example, **Communication Channels**.

3. Click **Edit**.

4. Modify the fields as required and click **Update** in the opened panel and in **Edit Communication Type**.

   See **Adding Communication Types** on page 63 for descriptions of the options to modify.

   See **Enforcing options** on page 59.

   > **Note:** Contact Pitney Bowes if you need to add new Pre-Printed Inserts. See **for more information on attachments and inserts.**

5. Click **Add** and in **Edit Communication Type** click **Update**.

6. The new Communication Type is available in the table. Before you can use it, it must be activated. Place a check mark in the box adjacent to it in the table and click **Activate**. The status in the table is now Active.

7. The new Communication type needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.

8. Click the **Roles** tool to open that page.

   The **Roles** page is shown below:
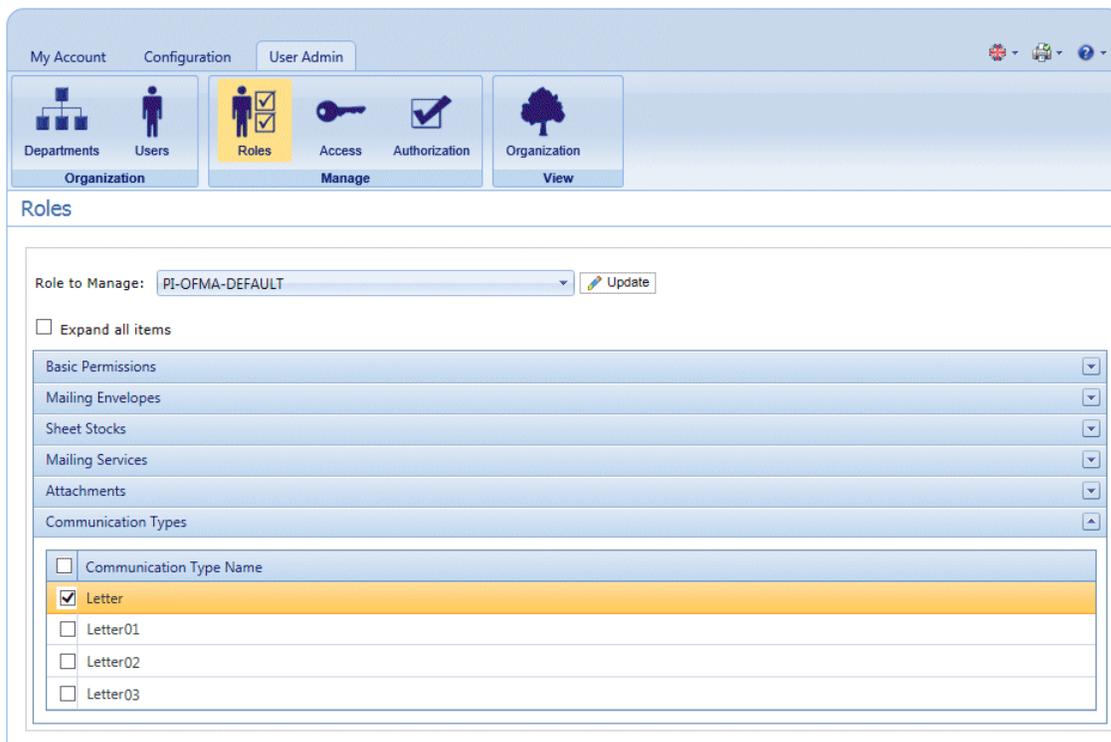
9. Ensure that the correct **Role to Manage** is selected.

10. Click **Communication Types** to open a list of those available.

11. Place a check mark in the box adjacent to the Communication type created earlier.

12. Click **Update**.

The edited item is now shown in the table.

Warning:

• Ensure that new Communication Type is activated and added to the correct role, if it is not it cannot be used.
• Each new or copied Communication Type MUST be activated. Failure to do so means that it will not appear in the Printer Driver.
• We strongly recommend that you ensure that the Communication Type is automatically selected in the Printer Driver as described in **Testing Communications Type** on page 72

Adding Communication Types

The procedure below describes how to add a Communication Type with search criteria text at a specific point on the first page of a mail piece. In the example, the search criteria was found as described in **Measuring the position of the search criteria**.

1. In the Relay Communication Hub's open the **Configuration** tab click **Types** to display the page; it contains a list of configured communication types, shown below:
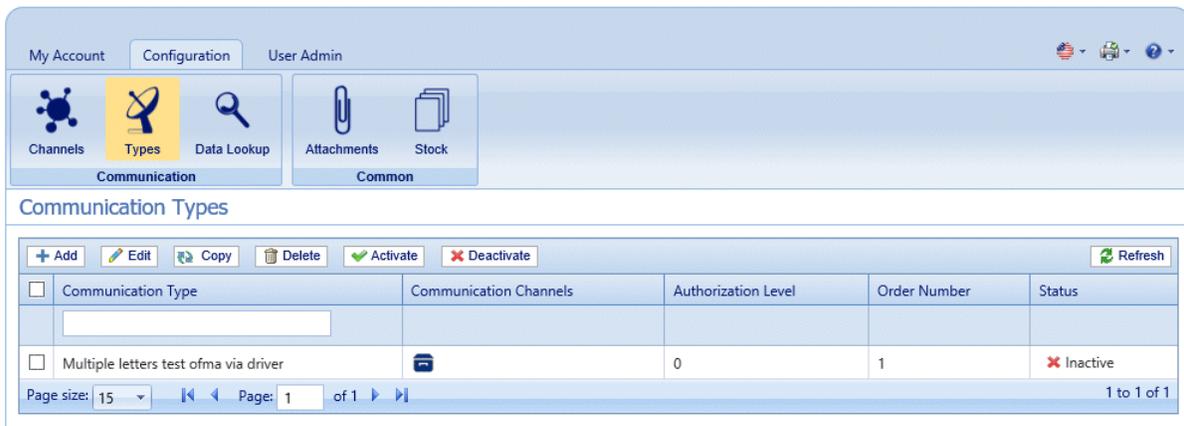
2. In the **Communication Types** page click **Add**.

    The following window is opened containing the fields required:

3. Type in a name for the **Communication Type**, we recommend you use something meaningful, perhaps to indicate the purpose of this type.

4. Type in an **Authorization Level**. This is a number between 0 and 9, where 0 means that no Authorization is required and 9 requires authorized at the highest level.

5. Type in an **Order Number**, this is the order in which the software looks through each Communication Type to select the one required.

   This is important where you have multiple Communication Type with similar search criteria, for example, Smith123, Smith1234.

   If the Order Number for Smith123 is specified as 2 and the Order Number for Smith1234 is specified as 1 the system may apply Smith1234 to everything with a similar search criteria.

6. Click on the **Search Criteria** heading to open the panel, it is shown, below:

7. Complete the fields as given above, for the purposes of the example we are using, these are:

   • Search Text: Smith12345
   • Side #: 1

- Top Left X: 260 mm
- Top Left Y: 20 mm
- Height: 7 mm
- Width: 30 mm

The measurements do not need to be precise, you just need to ensure that the box will contain the search criteria text on each mail piece.

8. Click **Add** and in **Edit Communication Type** click **Update**.

9. A **Communication Channel** must be specified for the Communication Type. Some default Channels are available. Click the Communication Channels heading to open the table, shown below:

10. Select the required **Communication Channel** from the list.

11. Select all the other options you need. Click on a link, below, for descriptions.

- **Splitting a job** on page 67
- **Moving items** on page 68
- **Extracting fields** on page 69

Once you have completed the required sections, return to this procedure to complete the definition of the **Communication Type**.

See **Enforcing options** on page 59.

> **Note:** Contact Pitney Bowes if you need to add new Pre-Printed Inserts. See **for more information on attachments and inserts.**

12. Click **Add** and in **Edit Communication Type** click **Update**.

13. The new Communication Type is available in the table. Before you can use it, it must be activated. Place a check mark in the box adjacent to it in the table and click **Activate**. The status in the table is now Active.

14. The new Communication type needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.

15. Click the **Roles** tool to open that page.

    The **Roles** page is shown below:
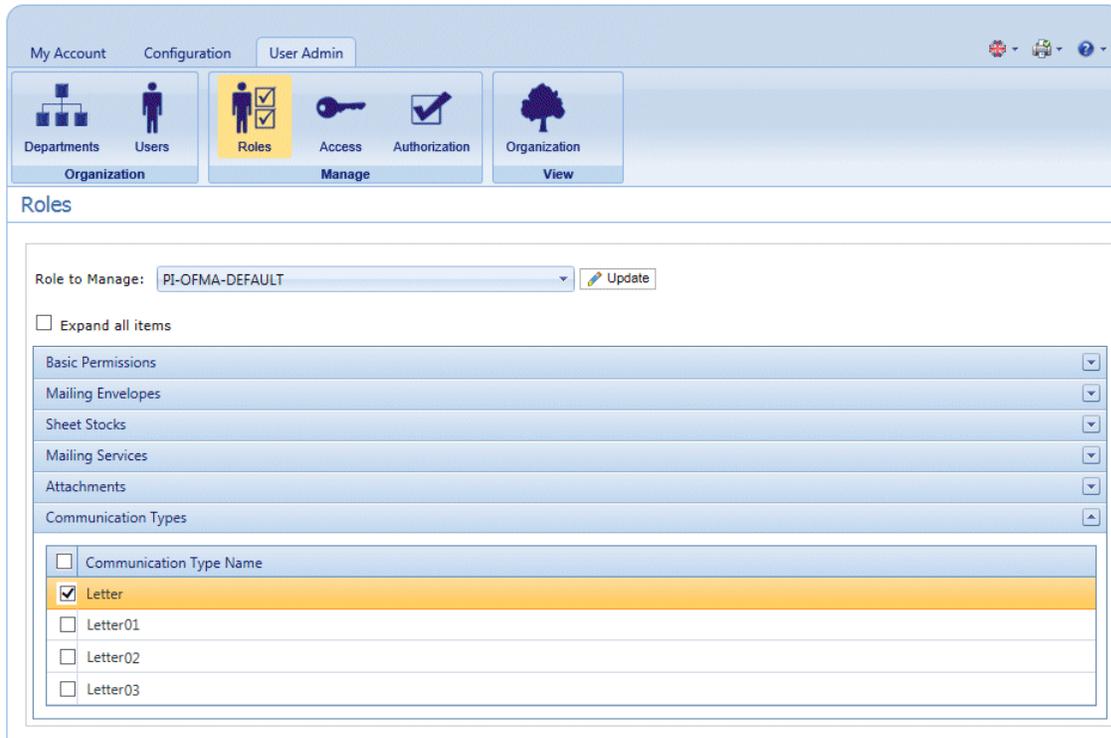
16. Ensure that the correct **Role to Manage** is selected.

17. Click **Communication Types** to open a list of those available.

18. Place a check mark in the box adjacent to the Communication type created earlier.

19. Click **Update**.

The new item is now shown in the table.

Warning:

- Ensure that new Communication Type is activated and added to the correct role, if it is not it cannot be used.
- Each new or copied Communication Type MUST be activated. Failure to do so means that it will not appear in the Printer Driver.
- We strongly recommend that you ensure that the Communication Type is automatically selected in the Printer Driver as described in **Testing Communications Type** on page 72

Splitting a job

You can define a place within the job at which to split it into two separate jobs.

To do this, you must already have begun **Adding Communication Types** on page 63. Once you get to step #11, you can set these options as described, below:

1. From within the required Communications Type click the **Split Criteria** heading to open the panel.

2. In **Split Criteria** click **Add** to open the following panel:

3. Complete the fields given above, these are the same as described for setting Search criteria, as described in **Adding Communication Types**. For the purposes of the example we are using, these are:

   - Search Text: Smith12345
   - Side #: 1
   - Top Left X: 260 mm
   - Top Left Y: 20 mm
   - Height: 7 mm
   - Width: 30 mm

   The measurements do not need to be precise, you just need to ensure that the box will contain the search criteria text on each mail piece.

   > **Note:** The measurement units are shown on the page, these may be different from those in the screen shot.

4. Click **Add**.

5. Return to **Adding Communication Types** on page 63 step# 12 to complete this procedure.

Moving items

You can define an area within a mail piece from which you can move this areas contents a new position on a specified side.

To do this, you must already have begun **Adding Communication Types** on page 63. Once you get to step #11, you can set these options as described, below:

1. From within the required Communications Type click the **Move** heading to open the panel.
2. In **Move Items** click **Add** to open the following panel:

> **Note:** The **Action Move** is automatically selected for you.

3. In **Side #** type in the number of the side from which to move the required item.
4. You need to define the item to be moved by specifying its location and size. From **Top Left X** type in the top left coordinate of the item to move.

> **Note:** The measurement units are shown on the page, these may be different from those in the screen shot.

5. In **Top Left Y** type in the top left coordinate of the item to be moved.
6. In **Width** type in the width of the item to be moved.
7. In **Height** type in the height of the item to be moved. You have now defined the perimeter of the item.
8. You need to define the location to which the item is to be moved. In **New Top Left X** type in the top left coordinate of the new location.
9. In **New Top Left Y** type in the top left coordinate of the new location.
10. If you wish to move **Copy to first page** select this option.
11. Click **Add**.

12. Either:

- You may now wish to define **fields to extract, or**
- Return to **Adding Communication Types** on page 63 step# 12 to complete this procedure.

Extracting fields

You may extract the contents of a field to use in a number of ways. This procedure describes how to define and area within the Job from which to extract a field in order to use it in the **Job Reference** field of the Printer Driver.

To do this, you must already have begun **Adding Communication Types** on page 63. Once you get to step #11, you can set these options as described, below:

1. From within the required Communications Type click the **Extract Fields** heading to open the panel.
2. In **Extract Fields** click **Add** to open the following panel:

3. In **Name** type in something meaningful by which to identify the extracted field. This is the field name you will use when defining the **Job Reference**. See **Specifying Job Options** on page 70.
4. Select **Capture** to save the extracted field with your job.
5. From **Type** select **Document**.
6. You need to define the field by specifying its location and size. From **Top Left X** type in the top left coordinate.

   Note: The measurement units are shown on the page, these may be different from those in the screen shot.

7. From **Top Left Y** type in the top left coordinate.

8. From **Width** type in the width of the field.

9. From **Height** type in the height of the field. You have now defined the field.

10. Click **Add**.

The extracted fields may be used to define the **Job Reference**, described in **Specifying Job Options** on page 70.

Extract Field can also be used to extract a field where data is taken from a look-up table rather than your Job using the **Type: Source** option. **Source** is defined in Menu Data Look-up. A field can be Derived, which means defined based on previously defined extract fields or combination of them.

Each extract field needs a unique **Name**. The defining options of the **Type** are dependent on the **Type** selected, additional options may be required. The **Document Type** requires specification of the area from where text is extracted. The **Look-up Type** requires a **Source** from which data is read and arguments added. The **Derived Type** requires a **Derived Value** which is an expression with a value based on fields already defined. All **Types** have **Capture** option which saves the field with the job.

Specifying Job Options

If you wish to define the job options available to Printer Driver users, you must already have begun **Adding Communication Types** on page 63. Once you get to step #11, you can set these options as described, below:

1. From within the required Communications Type click the **Job Options** heading to open the panel.

2. In **Job Options** click **Add** to open the following panel:

3. Click **Edit**.

4. From **Sides** select whether to allow the **Double-** or **Single-sided** printing.

5. From **Sheet 1** select the type of physical paper on which the first page of each mail piece is to be printed.

6. From **Sheet 2** select the type of physical paper on which all subsequent pages of each mail piece are to be printed.

7. From **Job Reference** you may leave this field blank, or:

   • Type in a reference
   • To extract data from the job, you must define the field to be extracted, this is described in **Extracting fields** on page 69. Once you have extracted the fields, type the name of the field you wish to use enclosed in double square brackets, for example, [[Job Name]] . You may use any number of fields to define this, for example, the Job Reference in the screen shot, above.

8. If you need to move the paper in the printer where the job is printing too close to one margin, you can nudge it by specifying the following options:

   • **Base Point** - change the point from which the nudge is calculated.
   • **Shift X** - move the page horizontally by this measurement from the base point.
   • **Shift Y** - move the page vertically by this measurement from the base point.

9. If you need to make the contents on the page larger or smaller, use the **Scale** option. The default setting is 100%, which is the size that contents are usually printed. Decrease this setting to make the contents smaller and increase this setting to make the contents larger.

   Warning: Decreasing this setting may cause the page contents to become unreadable. Increasing this setting may cause the contents to be too big to fit on the page.

10. From **Attachments** select the electronic attachments you wish to make available to the user.

11. From **Insets** select the physical inserts you wish to make available to the user.

12. Select any options you wish to enforce or select **Enforce All**. This will ensure that they are automatically selected in the Printer Driver and will not allow the user to make another selection.

13. Click **Update**.

14. Return to **Adding Communication Types** on page 63 step# 12 to complete this procedure.

Testing Communications Type

We strongly recommend that you test each new or copied Communication Type to ensure that it appears as the default selection in the Printer Driver.

To do this, follow the procedure, below:

1. Print your document through the Printer Driver, shown below.
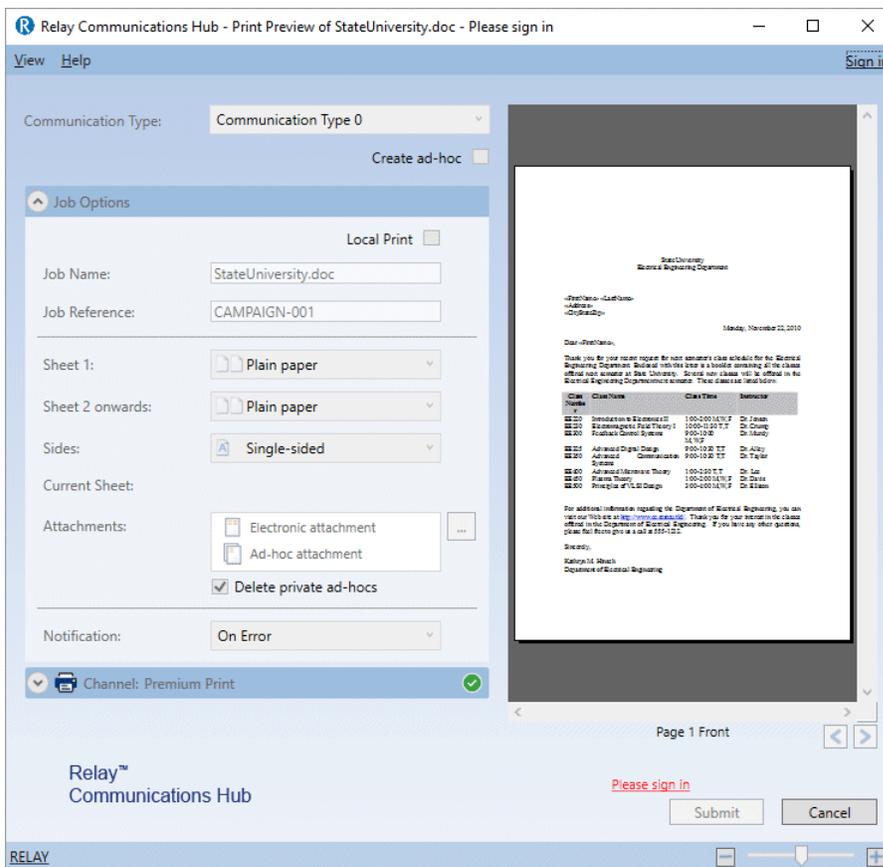
2. Sign in to the Printer Driver.

3. Check that the **Communication Type** has been automatically selected.

If the **Communication Type** has not been automatically selected, return to the **Communication Types** page and amend the settings.

> **Note:** Leaving the document open within the Printer Driver allows you to see the changes you have made, without having to resubmit the document each time. You may need to sign in again.

Deleting Communication Types

If you wish to temporarily discontinue use of a Communication Type consider deactivating it instead. This is done by selecting the required communication type(s) and clicking **Deactivate**.

To delete types, follow the procedure, below:

1. Ensure you are in the correct page, click the **Types** tool to open the **Communication Types** page.
2. Do one of the following:
   a) Place a check mark in the box adjacent to the required item.
   b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
   c) Place a check marks in the box in the header table's to select all items.

   This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

10 - Defining Your Organization

The User Management page allows you to manage departments and users, which enable you to create a structure for your organization.

In this section

Signing in to the Relay Communications Hub

To begin, open your browser:

1. In the address bar type the URL of the Relay Communications Hub Web Client. This is one of the following:

   North America & Canada:
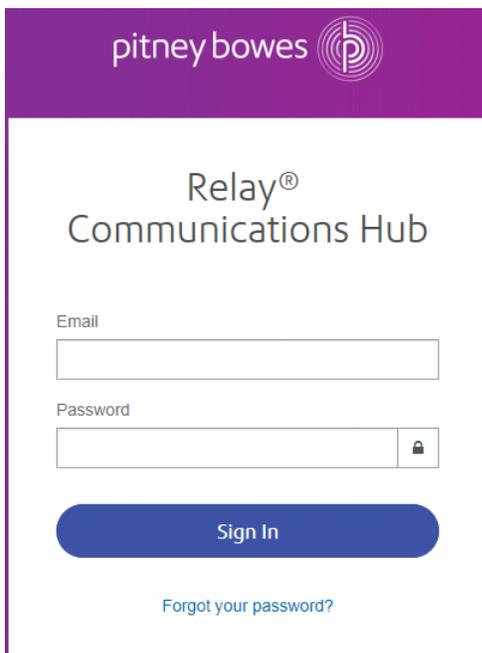
   https://client.relayhub.us.pitneybowes.com/

   Rest of World:

   https://client.relayhub.eu.pitneybowes.com/

   The **Sign in** page is displayed, as follows:

2. Type in your user credentials. By default this is your email address and a default password of "password".

   Warning: It is of the utmost importance that you change your password to something more secure as soon as possible. You risk attack by outside agencies if you fail to do so. For descriptions on how this is done see **for the US & Canada** or **for everywhere else**.

   > **Note:** After six incorrect login attempts you are locked out of the Relay Communications Hub. Use the **Forgot your password?** on page 76 facility to reset your sign in credentials.

Note: The **Sign In** page may offer the option to select a language in which this page is displayed. However, this sets the language option only for this page, to display the remainder of the website in a different language see **Changing the display language** on page 77.

Note: After 30 minutes of inactivity your session will expire and you will need to sign in again.

3. Click **Sign in**.

Relay Communications Hub is then displayed.

Forgot your password?

If you have forgotten your password, do the following:

1. In the **Sign in** page click **Forgot your password?**
2. Type in your email.
3. Click **Send Reset Link**
4. Click **Return to Sign In**.

You are returned to the **Sign in** page. You will receive an email with instructions on how to reset your password. Follow these and then sign in again.

Help

Clicking ⊘ in the top right of the window opens a menu, as follows:
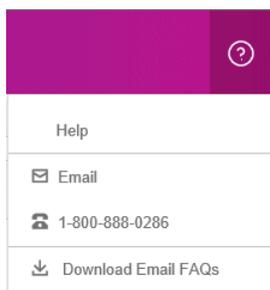
If you are experiencing any problems, dial the number to contact Pitney Bowes.

Changing the display language

Relay Communications Hub automatically detects the language in which it should be displayed from your system. If you wish to change this, click ⊕ in the top right of your screen, the menu is shown below:
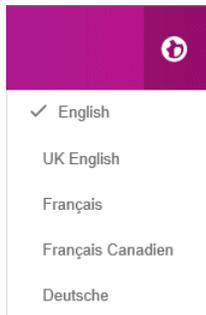
Click your preferred language. The menu closes, the page is displayed in the selected language. The next time you sign in Relay Communications Hub is displayed in the selected language.

Navigating The User Interface

When you have signed in the User Interface is shown:
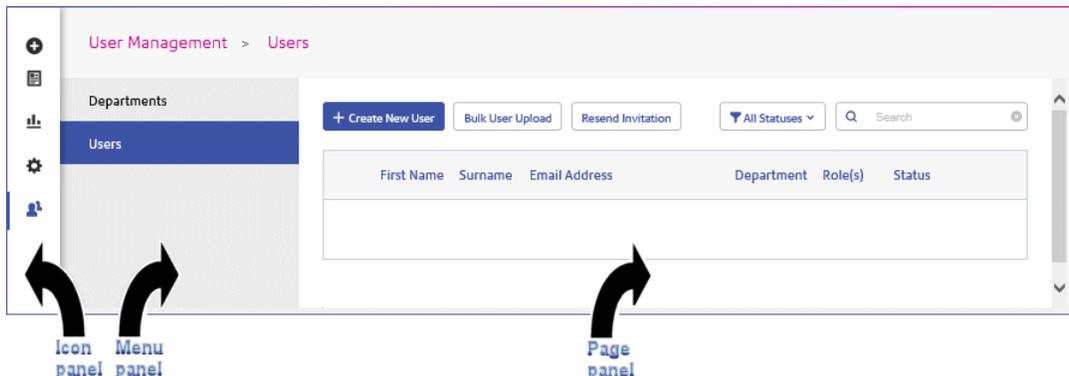
To open a page, click the required icon in the Icon panel and select a menu option to open the page. In the example, above, the following have been selected:

👥 to open the **User Management** menu and **Users** to open the **Users** page.

Navigation Icons and Menus

The User Interface's Icon panel options and menus are listed below:

Templates

Clicking 🖬 opens the **Templates** page, the menu for which is only displayed once you have begun creating or editing a job:

The following shows the **Templates** menu:
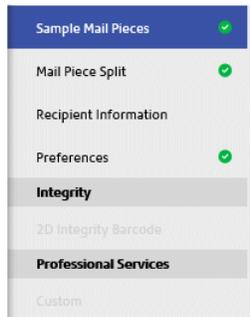
The option highlighted in blue is currently open. Options marked with a ✔ are complete.

The process of defining each is described in **Creating A Template**

Reports

Clicking 📊 opens the **Reports** page, this has no menu panel.

The functions of this page are described in **Viewing Job Reports**

Settings

Clicking ⚙ opens the **Settings** page, the menu for which has the following options:

Download Clients	Provides links which allow you to download clients, for example, the Desktop Client.

See **Downloading the Desktop Client** on page 114

User Management

Clicking 👤 opens the User Management page, the menu for which has the following options:

Departments	Provides the facility for creating and managing Departments.
Users	Provides the facility for creating and managing Users.

See **Defining Your Organization** on page 74

Creating Departments

To create a department, follow the procedure, below:

> **Note:** Departments are selected during the creation of users and so must be created first.

1. Click 👤 in the left-hand panel to open the **User Management** page, by default, it opens in **Department**:
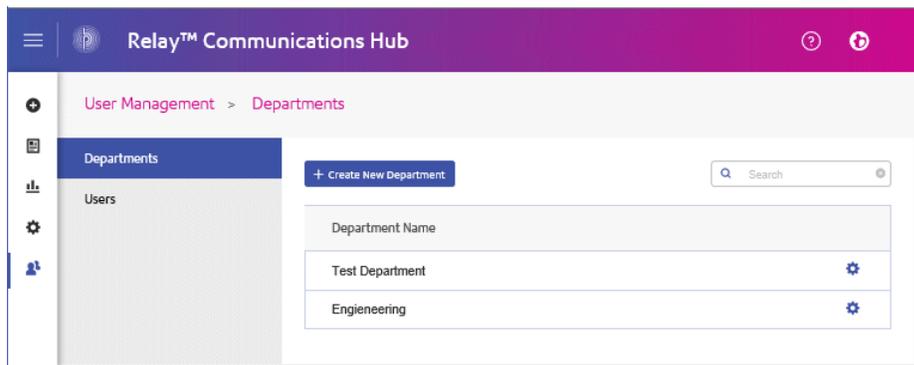
2. Click **Create New Department**.
3. A window is opened containing the **Department Name** field, type in a name.

The window closes and the new department is shown in the **Departments** page.

Creating Users

To create a user, follow the procedure, below:

> **Note:** Departments are selected during the creation of users and so must be created first.

1. Click 👤 in the left-hand panel to open the **User Management** page, by default, it opens in **Departments**.
2. Click **Users** to open the page:
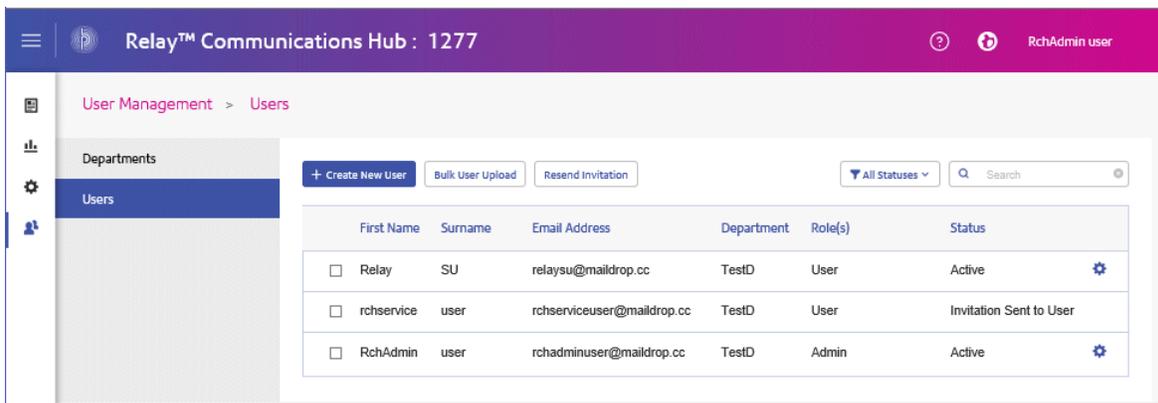
3. Click **Create New User**.

    The following is opened:

4. Complete the information in this page for the user.

    Only one Department may be selected.

    Any number of roles may be selected, however, we recommend multiple roles only for Admin and Chief Operator.

5. Click **Save**.

The window closes and the new user is shown in the **Users** page with a **Status** of **Invitation Sent to User**.

> **Note:** From this point, the user can no longer be deleted.

The user will receive an email inviting them to complete their registration, see the next section.

Completing User Registration

All created users receive an automatically generated email, shown below:
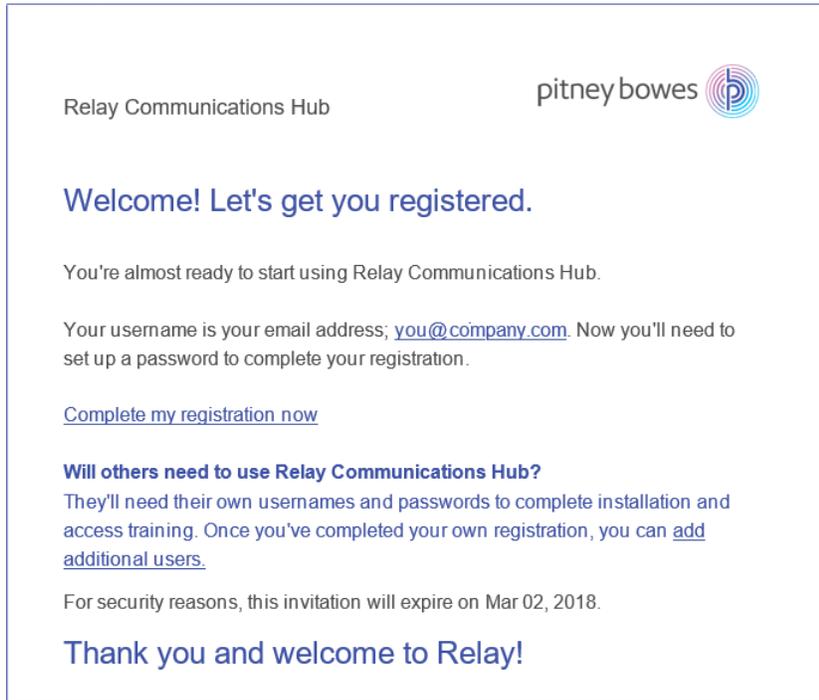
The email contains a link, "Complete my registration now", which takes them to the Relay Communications Hub website.

They then need to create and confirm a password, as described in **Signing In For The First Time** on page 22

A message is displayed confirming successful registration and the user is shown in the **Users** page with a status of Active.

Resending a user invitation

If you have created a user and they have failed to complete their registration for whatever reason, and you wish to resend the invitation, follow the procedure below:

1. Select the required user(s) by placing a check mark in the adjacent check box.
2. Click **Resend Invitation**.

> **Note:** We recommend that you advise users to check their junk email folders if they find that repeated emails are not being received.

3. A message is displayed confirming resend, click **OK** to close it.

Editing Departments and Users

Note:

Only the **Departments** or **Users** appearing in these tables can be edited.

The process for editing is much the same as for adding Departments and Users, the information shown in the page is different for each.

To edit information shown in a table, follow the procedure, below:

1. Within either the **Departments** or **Users** page click ⚙ in the required row.
2. Select **Edit** from the context menu.
3. A window is opened containing the fields required. Amend these as needed and click **Update**.

The new information is now shown in the table.

Deleting Departments and Users

Note:

Only the **Departments** or **Users** appearing in these tables can be deleted.

Departments with assigned users cannot be deleted. If you need to delete a department, change the department for its users of delete the users first.

To delete an item, follow the procedure, below:

1. Within either the **Departments** or **Users** page click ⚙ in the required row.
2. Select **Delete** from the context menu.

    A confirmation dialog is opened.

3. Click **Yes** to confirm the deletion.

A message is displayed advising successful deletion and the user/department is removed from the table.

Importing data in to Relay Communications Hub

Relay Communications Hub allows Departments and Users to be imported from a `csv` file. The benefit of using this facility is that it is often quicker to import a file than it is to fill out a number of fields.

The fields required in the csv file are the same as the fields given for creating a user, each user must appear on a separate line.

Refer to **CSV File Formats** on page 178 for examples of how to layout your `csv` file.

To import information:

1. Ensure that the media or drive on which the csv file resides is available and navigable.
2. Click ⚙ in the left-hand panel to open the **User Management** page.
3. Click **Users** to open the required page.
4. Click **Bulk User Upload** to open the following:
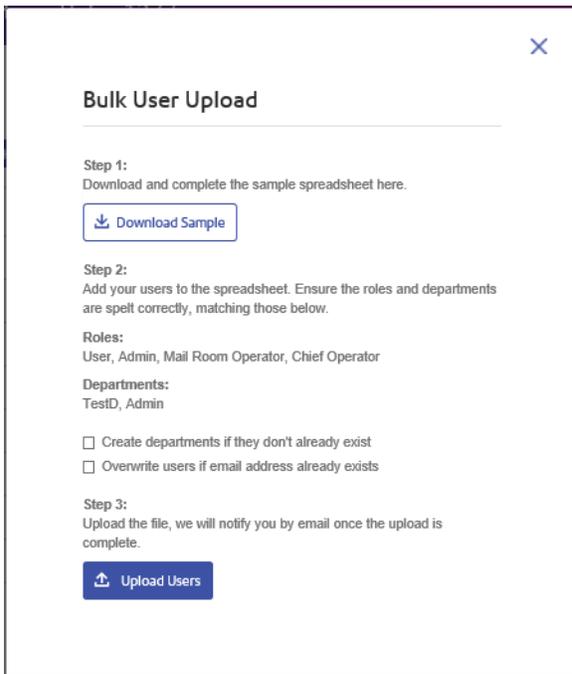
5. If required, select **Create departments if they do not already exist**.
6. If required, select **Overwrite users if email address already exists**.
7. Click **Upload Users**.

   The **Choose File to Upload** dialog is opened.

8. Navigate to and select the required file.

9. Click **Open**. The **Choose File to Upload** dialog closes.

    Back in the **Users** page, a confirmation message is displayed and the new users appear in the table. If you open the Departments page, the new departments are shown.

Setting a Password Expiration Policy

By default, Relay Communications Hub passwords do not expire. To enforce expiry create a policy as described below:

1. Click ⚙ in the left-hand panel to open the **Settings** page, by default, it opens in **Account**:
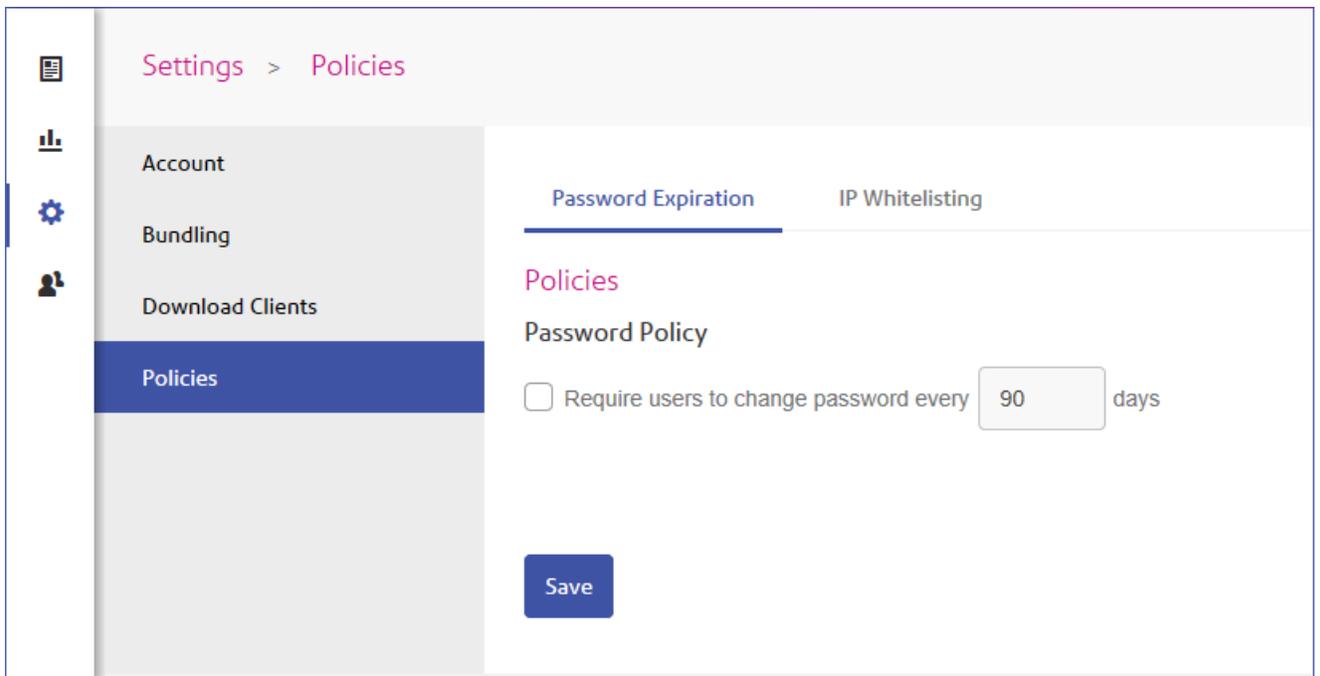
2. Click **Policies**.

    The **Policies** page is opened on **Password Expiration**, shown above.

3. Click **Require users to change password** to enable this feature.

    The following is displayed:

4. Specify the number of days passwords after which users must change their passord.

   The default setting is 90 days.

5. Specify the number of days before the expiry that users are notified.

   The default is 15. If the password is set to expire at 90 days and the notification is set to 10 days, notifications are dislayed 80 days after the password was last reset.

6. Click **Save**.

Once you click **Save**, the policy is enforced and the expiry period for passwords begins.

Setting an IP Whitelist Policy

An IP white list policy allows you to define IP addresses from which Relay Communications Hub will accept data. You can specify the IP address of an individual user or a range of IP addresses for all users or individual users.

To create an IP Whitelist policy follow the procedure below:

1. Click ⚙ in the left-hand panel to open the **Settings** page, by default, it opens in **Account**.
2. In the menu on the left, click **Policies**.

   The **Policies** page is opened on **Password Expiration**.

3. Click the **IP Whitelisting** tab to open it, shown below:
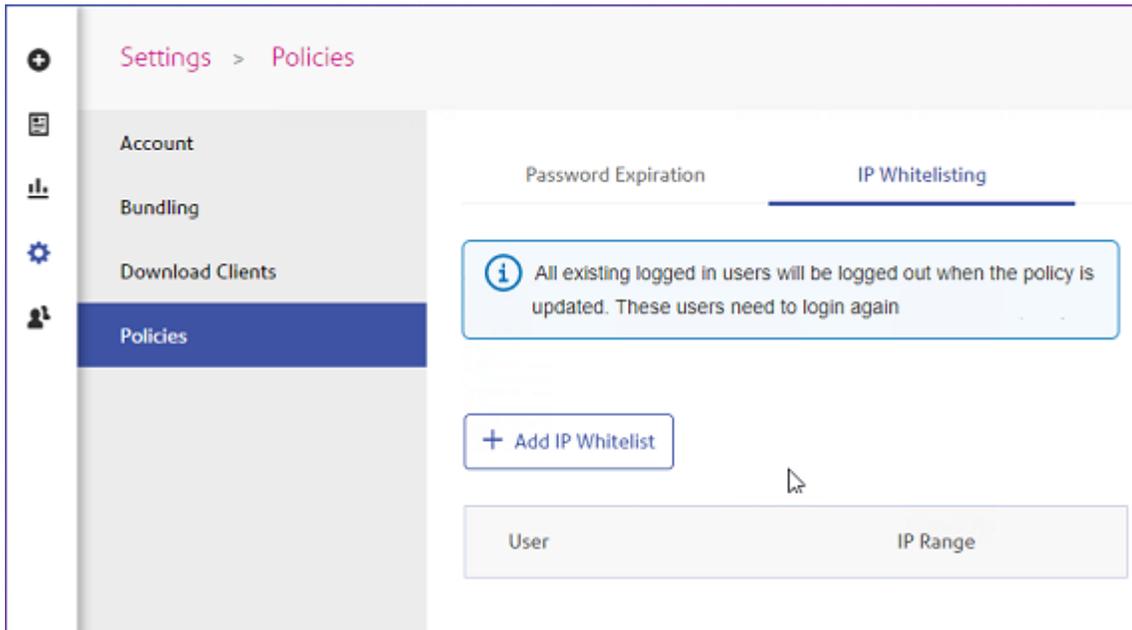
4. Click **Add IP Whitelist**.

The following is displayed:
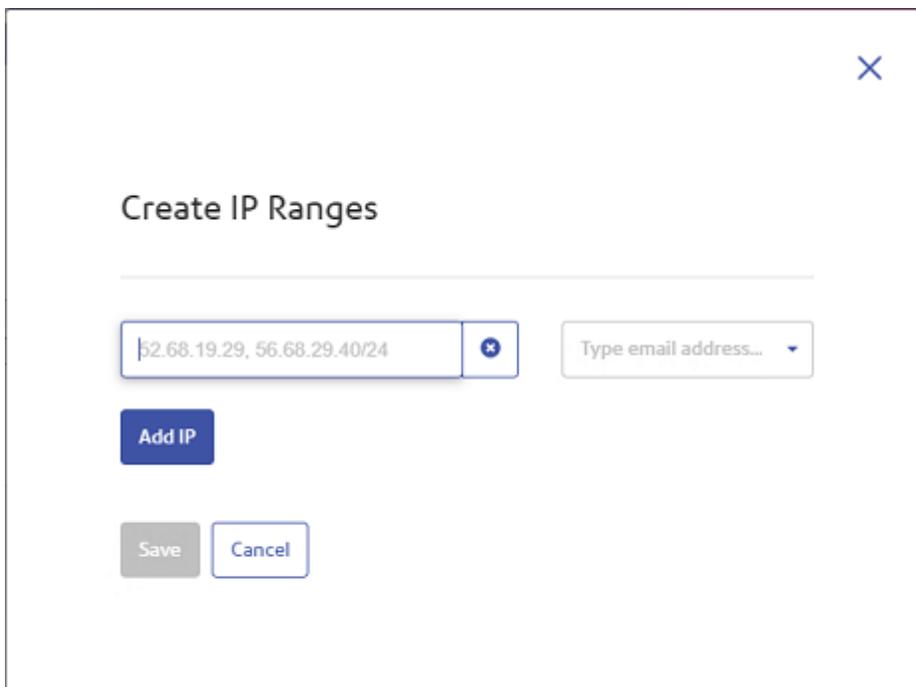
5. Type in one of the following:

   • an IP address, for example, 52.68.19.29
   • a range of IP addresses in CIDR format, for example, 56.68.29.40/24

6. From Type email address either:

    • Select the email address of a user,or
    • Select **All Users** for all users in your organization.

7. Click **Add IP** to create further whitelist items.
8. Once you have added the required IP addresses, click **Save**.

Once you click **Save**, the policy is enforced immediately and the whitelist is shown in the page:
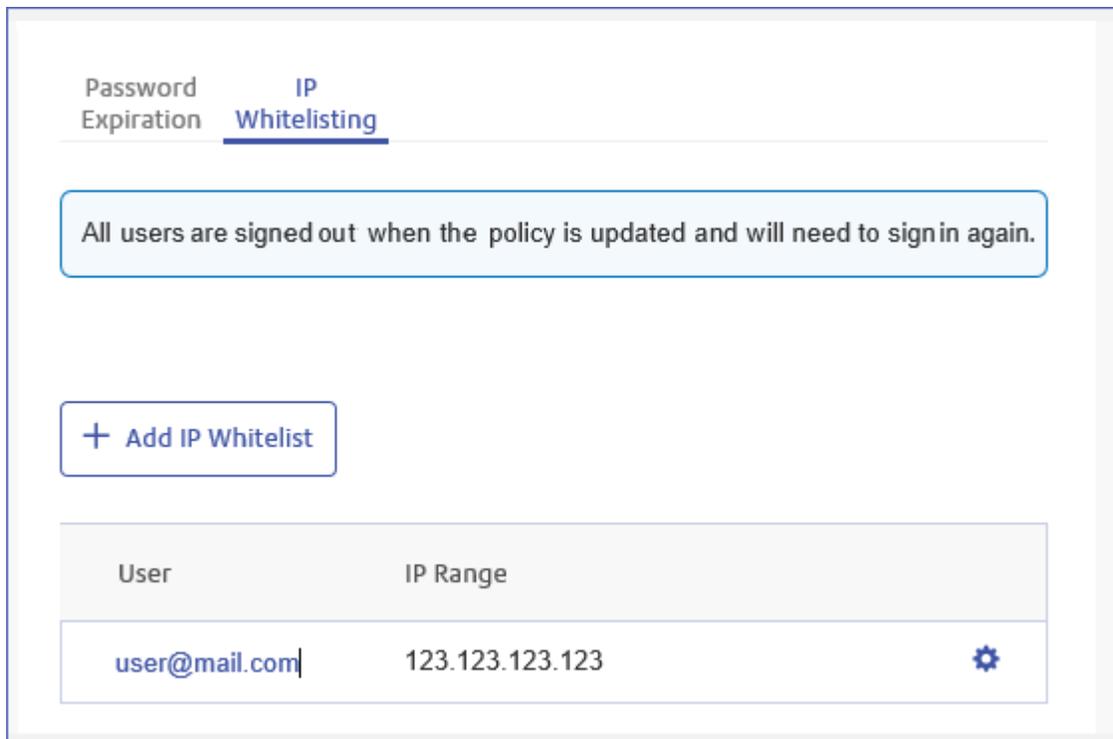
> **Note:** When a policy is set or changed all users, except those using the Desktop Client, are signed out and need to sign in again.

> **Note:** When users attempt to sign in form an IP address which is outside the range of addresses assigned to them in the whitelist the following message is displayed:

We can't let you in.

Invalid IP Address

Please contact your company administrator for support.
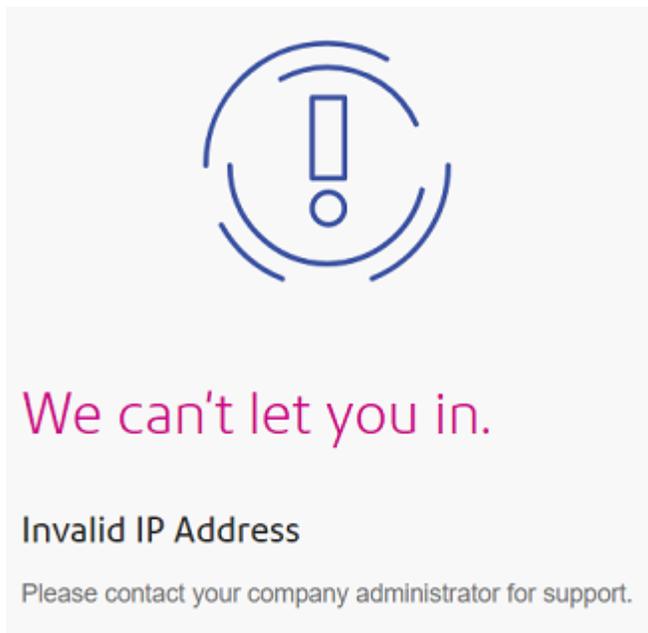
Editing Whitelist items

To edit information shown in a table, follow the procedure, below:

1. Within the **IP Whitelisting** tab click ⚙ in the required row.
2. Select **Edit** from the context menu.
3. A window is opened containing the fields required. Amend these as needed and click **Update**.

The new information is now shown in the table.

Deleting Whitelist items

To delete an item, follow the procedure, below:

1. Within the **IP Whitelisting** tab click ⚙ in the required row.
2. Select **Delete** from the context menu.

   A confirmation dialog is opened.

3. Click **Yes** to confirm the deletion.

A message is displayed advising successful deletion and the item is removed from the table.

Viewing users

There are two types of user:

Users	Submit their jobs to Relay Communications Hub through one of the following methods:
	• printing a job through the Printer Driver • creating a job in the Web Client • dragging and dropping a job into a hot folder provided by the Desktop Client
Administrator	Undertake the following tasks:
	• create and maintain users • assign users to departments • oversee the use of Relay Communications Hub

To view current Relay Communications Hub users:

From within the left hand panel click 👥 to open the **User Management** menu.

The following page is opened:

Searching for users

To search for a user, follow these steps:

1. From within the **User** tab click in the **Search** box, shown below:

2. Type in the letters for which you wish to search.

The first letter you type displays all users with that letter in their name. For example, if you type "m", all names containing that letter are displayed.

The next letter you type displays all users with the two letters consecutively in their name. For example, if you type "me", all names containing these letters in consecutively are displayed. Continue typing to narrow your search.

To return to the previous list of users, delete the characters in the **Search** box.

Filtering users

By default, all users with an active status are displayed. To filter the list of users, follow these steps:

1. From within the **User** tab click **Active**, to open the list of options, shown next:
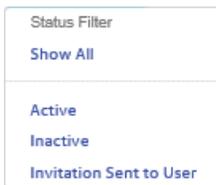
2. Select the required status.

All users with the selected status are displayed.

11 - Managing Bundles and Triggers

This section is for Chief Operators and describes how to define bundle criteria. Jobs received from submitting users are concatenated into a print stream by bundle criteria, that is, a group of similar attributes, for example, jobs may be bundled based on criteria such as:

- Envelope size
- Mail class
- Paper on which the jobs are to be printed
- Whether the job are printed as single- or double-sided
- Whether the job are printed in color or black and white
- Whether a common insert is required

These print streams may then be released to download to a Relay Communications Hub hot folder, and where configured a printer, automatically, as described in **Defining Triggers** on page 94 or **manually released** for download.

In this section

Creating a new bundle

Note: This function is only available to Chief Operators.

When you first sign in the following is displayed:
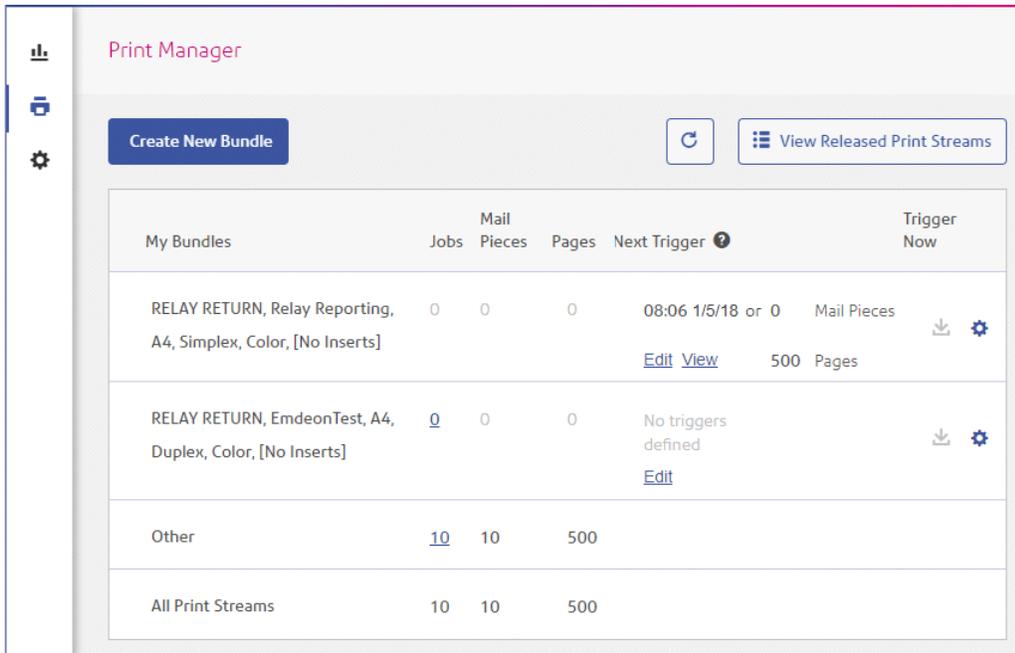
To define a bundle, follow the procedure, below:

Note:

Once you have made a selection from the options given in the screen the **Bundle Name** begins to be filled. The bundle name is made up of the selections you make in this window. For example, selecting **C5** from **Envelope** also specifies the first part of the bundle name as C5. An example bundle name is:

C5, 2nd Class, A4, Simplex, Black & White, Insert 1

where:

Envelope	C5
Mail Class	2nd Class
Paper	A4

Plex	Simplex
Color	Black & White
Insert	Insert 1

Note: The bundle named **Other** catches all jobs which do not conform to the attributes collected by the bundles listed above it. These jobs are not concatenated and may not build up sufficient volume to merit manual release.

1. Click **Create New Bundle**.

    This opens the following:

Create New Bundle

Envelope *
Select

Mail class *
Select

Paper *
Select

Plex *
Select

Color *
Select

Inserts *
Select

Accumulation Workflow *
Select

Bundle Name
Name of the Bundle

Save Cancel

Note: An option must be specified for all fields.

2. From **Envelope** select the size of the envelope in which the printed mail pieces is to be inserted, for example, C5, DL.

3. From **Mail Class** select the class of mail by which the mail pieces is to be sent, for example, 1st Class, 2nd Class..

4. From **Paper** select the paper on which the mail pieces is to be printed, for example, size: A4, A4 pre-printed letter head.

5. From **Plex** select whether the mail pieces are to be printed single- or double-sided, that is, simplex, duplex.

6. From **Color** select whether the mail pieces are to be printed in color or black and white.

7. From **Inserts** select the inserts to be included with the mail pieces in its envelopes.

8. From **Accumulation Window** select the accumulation window in which this bundle is to appear.

9. Once you have made your required selections, click **Save**.

> **Note:** An error message is displayed a bundle with the same criteria exists.

10. If you wish to define a trigger for this bundle, which automatically releases the print stream for download, click **Edit** in the **Trigger** column for the bundle.

   This opens the **Edit Trigger** page, see **Defining Triggers** for instructions on its use.

The following message is displayed in the top right corner of the page:

> The new bundle has been created

The new bundle is shown in the **My Bundles** page.

Defining Triggers

> **Note:** This function is only available to Chief Operators.

This section describes how to create, edit and review the criteria on which Bundled jobs are triggered, that is, when they are released for downloaded to the to printer.

Bundle triggers fall into two categories:

- Released when a specified number of pages or mail pieces in the print stream has been exceeded
- Released at a specified time

You may create triggers in which both time and volume are defined. In addition, you may specify exceptions in the trigger so that print streams are not released at specific times, for example, at the weekend or on public holidays. This feature may also be used to stop print streams releasing to a printer awaiting repair.
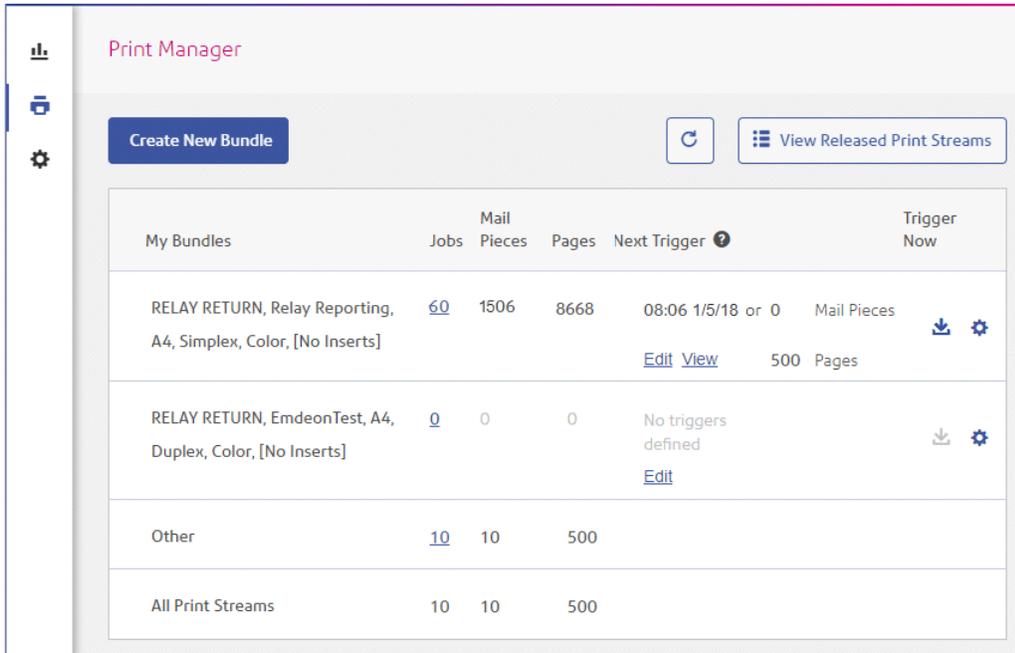
To begin creating a trigger, follow the procedure, below:

1. From the required print stream, click **Edit**.

    The following is opened:
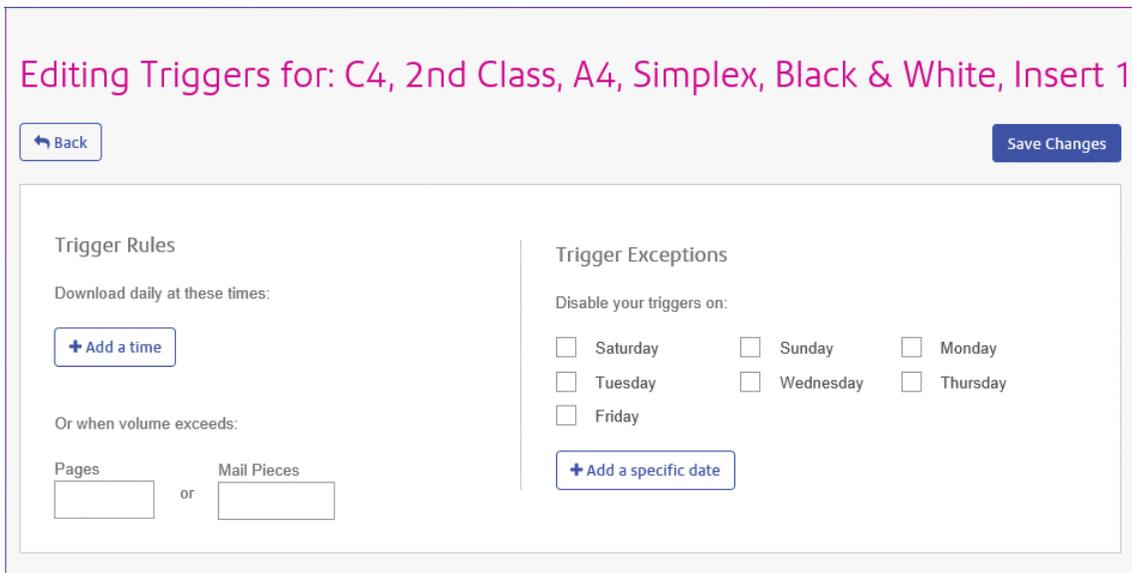
2. Choose one of the following:

    - Define a **timed trigger**
    - Define a **volume trigger**
    - Set **exception days** for this trigger, that is, days on which this trigger does not download the print stream

- Set **specific exception dates**

  You may choose to set all of these, a link from each procedure takes you to the others.

3. Once you have defined your triggers and set your exception times, click **Save Changes**.
4. Click **Back** to return to the **Print Streams** page.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

This trigger may be edited at any time using this procedure.

Creating a time trigger

To create a timed trigger, follow the procedure, below:

1. To download daily at a specified time click **Add a time** to open the following:

Trigger Rules
Download daily at these times:

Time	
00:00	⊖

   + Add a time

2. The default time is given as 00:00, highlight this and type in the time required.
3. Click **Add a time**, the new time is shown.

   We strongly recommend that instead of adding multiple download times, add a volume trigger if you are experiencing unusually high numbers of pages or mail pieces.

4. Click **Save Changes**.
5. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

You may also choose to set one or all of the following:

- Set days at which this trigger will not release print streams, for example weekends, as described in **exception days**
- Set specific dates on which this trigger will not release print streams, for example public holidays, as described in**specific exception dates**
- Specify the maximum number of mail pieces or jobs that, once exceeded, trigger the release of a print stream, as described in **volume trigger** in addition to your timed trigger

You may choose to set all of these, a link from each procedure takes you to the others.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

Creating a volume trigger

To download the print stream when the volume exceeds a number or pages or mail pieces, follow the procedure below:

1. Either:

   • Click within the **Pages** box, or
   • Click within the **Mail Pieces** box

2. Type in the maximum volume, this must be in whole numbers.
3. Click **Save Changes**.
4. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

   Note: If you set the trigger at 45 mail pieces, and 50 mail pieces are in the job, as soon as 45 out of the 50 are mail pieces are accumulated, the trigger is fired, the bundle is released and a new job is created, even when the remaining 5 mail pieces came from the same document.

You also then choose to set one or all of the following:

• Set days at which this trigger will not release print streams, for example weekends, as described in **exception days**
• Set specific dates on which this trigger will not release print streams, for example public holidays, as described in **specific exception dates**

You may choose to set all of these, a link from each procedure takes you to the next.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

Creating trigger exception for specific days

To disable triggers on specific days of the week, for example weekends, follow the procedure, below:

1. From **Trigger Exceptions** select the days on which the print stream is NOT to be released.
2. Click **Save Changes**.
3. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

You may also choose to set specific dates on which this trigger will not release print streams, for example public holidays, as described in **specific exception dates**.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

Creating trigger exception for specific dates

To disable triggers on specific dates, for example public holidays, follow the procedure, below:

1. In **Trigger Exceptions** click **Add a specific date**.

   The following is opened:
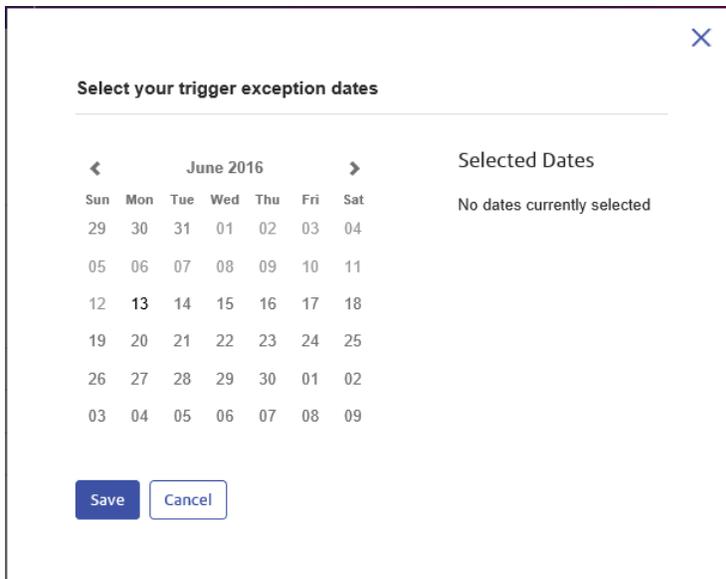
2. Click the arrows to move backwards or forwards to find the required month.
3. Select the date required from the calendar. Add as many dates as you need, these are then displayed under **Selected Dates**.
4. Once you have added all the dates you need click **Save**.

   This closes the calendar and returns you to the **Edit Triggers** window.

5. Click **Save Changes**.
6. Click **Back** to return to the **Print Streams** page.

Editing a bundle

> **Note:** This function is only available to Chief Operators.

To edit a bundle, follow the procedure, below:

1. From within the **My Bundles** page, click ⚙ for the required bundle.
2. Select **Edit** from the displayed menu.

   The **Edit Bundle** page is opened.

   > **Note:** An option has been selected for each field in this window.

3. Amend the required fields.

   These are described in **Creating a new bundle** on page 92.

   > **Note:** As you make changes to the fields, the **Bundle Name** changes to reflect the new selection.

4. Click **Save**.

The edited bundle name is shown in the **My Bundles** page.

Delete a bundle

> **Note:** This function is only available to Chief Operators.

To delete a bundle, follow the procedure, below:

1. From within the **My Bundles** page, click ⚙ for the required bundle.
2. Select **Delete** from the displayed menu.
3. You are prompted to confirm the deletion. Click **OK**.

The deleted bundle is no longer available in the table.

Managing Bundling Options

Chief Operators need to define the options available when **Creating a new bundle** on page 92. The options created describe options available on the printers and inserters used to output and post mail pieces. In some cases, for example, Envelope, Paper and Inserts, these options refer to physical stationary. In other cases, for example Plex and Color, these refer to print options provided on the printer.

The procedure for creating these options is the same in all cases.

> **Note:** You may create as may options as you wish, however, they will only work where the same options are available on the printers and inserters used in your print room.

Creating Envelopes

To add an envelope option, follow the procedure below.

> **Note:** Only options describing physical envelopes available on the inserters you use should be added. If you create an envelope for which there is no physical equivalent, the bundle will fail.

1. Click ⚙ in the left-hand side panel.
2. Click **Bundling**.

   This opens the following:
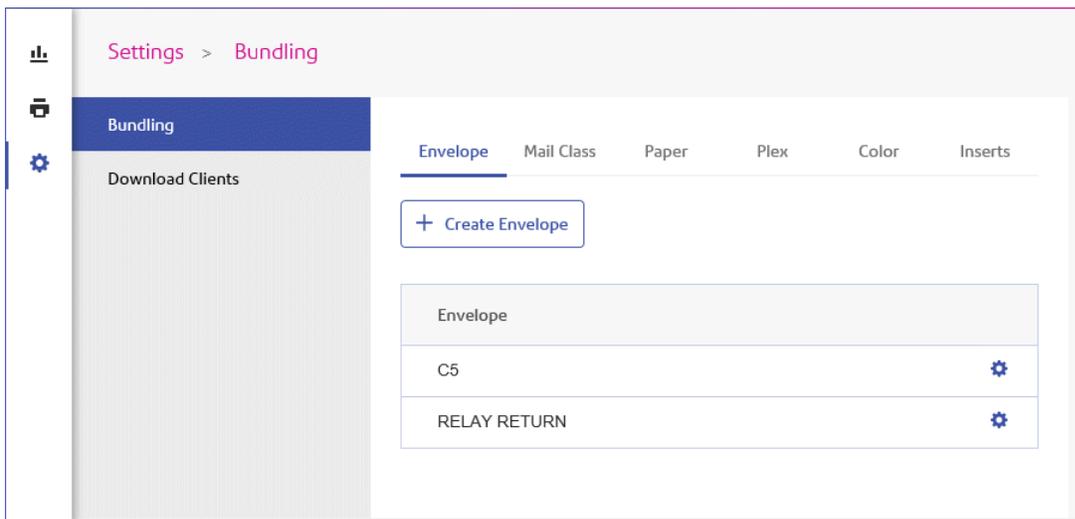
3. Click **Create Envelope**.

The following window is displayed:

Add Envelope attribute

Attribute Name

Create   Cancel

4.   Type in a name for the envelope.

We recommend that you use the envelope size as its name, for example, A4. If you are creating an option for an A4 envelope with an address window, we suggest using A4_window or something similar.

5.   Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

Creating Mail Classes

To create a mail class option, follow the procedure below. This is similar to the procedure for **Creating Envelopes** on page 100.

Note: Only options describing available Mail Classes, for example, 1st or 2nd Class, Signed For. If you create an option for which there is no postal service equivalent, the bundle will fail.

1.   Click ⚙ in the left-hand side panel.
2.   Click **Bundling**.

This opens the **Bundling** page.

3.   Click **Mail Classes** to open the page.
4.   Click **Create Mail Class**.
5.   In the newly opened window type in a name for the Mail Class.

We recommend that you use the name of the mail class, for example, 2nd Class.

6.   Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

Creating Paper

To create a Paper option, follow the procedure below. This is similar to the procedure for **Creating Envelopes** on page 100.

> **Note:** Only options describing Paper available on the printers to which you have access should be created. If you create an option for which there is no available physical paper equivalent, the bundle will fail.

1. Click ✿ in the left-hand side panel.
2. Click **Bundling**.

   This opens the **Bundling** page.

3. Click **Paper** to open the page.
4. Click **Create Paper**.
5. In the newly opened window type in a name for the Paper.

   We recommend that you use the name of the paper, for example, Letter.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

Creating Plex

To create a Plex option, follow the procedure below. This is similar to the procedure for **Creating Envelopes** on page 100.

> **Note:** Only options describing plex options available on the printers to which you have access should be created. If you create an option for which there is no available plex equivalent, the bundle will fail.

1. Click ✿ in the left-hand side panel.
2. Click **Bundling**.

   This opens the **Bundling** page.

3. Click **Plex** to open the page.
4. Click **Create Plex**.
5. In the newly opened window type in a name for the Plex.

   We recommend that you use the name of the Plex, for example, Simplex, Duplex.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

Creating Color

To create a Color option, follow the procedure below. This is similar to the procedure for **Creating Envelopes** on page 100.

> **Note:** Only options describing color options available on the printers to which you have access should be created. If you create an option for which there is no available color equivalent, the bundle will fail.

1. Click ✿ in the left-hand side panel.
2. Click **Bundling**.

   This opens the **Bundling** page.

3. Click **Color** to open the page.
4. Click **Create Color**.
5. In the newly opened window type in a name for the Color.

   We recommend that you use the name of the Color, for example, Color, Black and White.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

Creating Inserts

To create a Inserts option, follow the procedure below. This is similar to the procedure for **Creating Envelopes** on page 100.

> **Note:** Only options describing inserts available on the inserters to which you have access should be created. If you create an option for which there is no available insert equivalent, the bundle will fail.

1. Click ✿ in the left-hand side panel.
2. Click **Bundling**.

   This opens the **Bundling** page.

3. Click **Inserts** to open the page.

4. Click **Create Inserts**.

5. In the newly opened window type in a name for the Inserts.

    We recommend that you use the name of the Inserts.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

12 - Administrating Relay Communications Hub

If you have an Administrator role or permissions, you may have access to the Administration menu, available by clicking your user name in the top right-hand of the page. In the following example, the user name is Relay Admin, click this to open the menu.

It has three options, shown next:
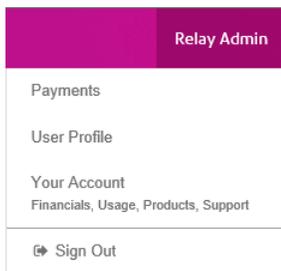
These options provide the tools for administration of the Relay Communications Hub, including the following:

- Viewing and changing you user profile
- Signing out of Relay Communications Hub

In this section

Editing your profile

To view your user profile, click on your user name in the header and select **User Profile** from the menu.

The following is displayed:
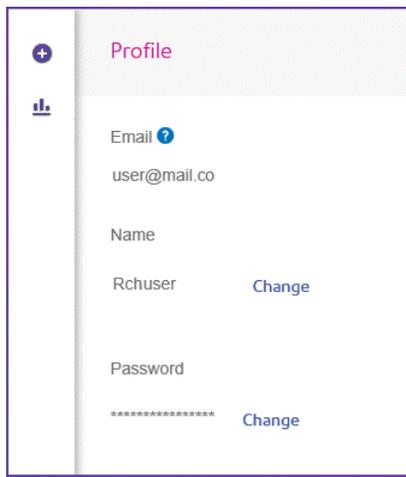
Your email address, user name and password are given.

Changing Your Name on page 106 and **Forgotten your password?** on page 25 are covered next.

> **Note:** You can change you user name and password but not both at the same time. Complete the process for one and then for the other.

Changing Your Name

To change your name:

1. From within the **Profile** page click **Change** next to your name.

   The following is opened:

2. Type in a new value for **First name**.

3. Type in a new value for **Last name**.

4. Click **Save**.

Once you click **Save** your new user name is shown in the **Profile** page.

Changing Your Password

> **Note:** See **Signing In For The First Time** on page 22 for a list of password criteria.

To change your password:

1. From within the **Profile** page click **Change** next to your password.

    The following is opened:

2. Type in a new value for **Old Password**.

3. Type in a new value for **New Password**.

4. Type in a the same value for **Re-enter Password**.

5. Click **Save**.

Once you click **Save** your new user name is shown in the **Profile** page.

Viewing Version Information

To view the Relay Communications Hub version, click your user name in the header and select **About** from the menu. The following is displayed:
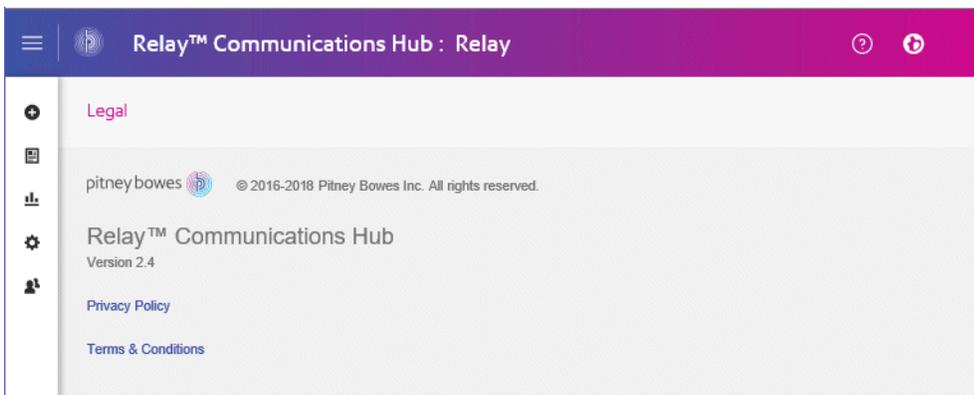
this page has the following links:

Pitney Bowes logo	Takes you to the Pitney bowes website.
Privacy policy	Opens the Privacy Statement.
Terms & Conditions	Opens the Terms of User.

Signing out

To sign out from Relay Communications Hub, click your user name in the header and select **Sign out** from the menu. You are then returned to the **Sign in** page.

13 - Managing Your Contact Information

If you have an Administrator role or permissions, you may have access to the **Settings** slide out menu, available by clicking ⚙ in the right-hand panel. The Settings menu has three options, **Account**, **Bundling** and **Download Clients**. This section describes how to use the **Account** option.

In this section

Updating Your Contact Information

Your contact information should have been set on creation of the Relay Communications Hub System. You may not need to update all fields, so only change those required. To do this, follow the procedure, below:

1. Click ⚙ in the left-hand side panel.
2. Click **Account**.

    This opens the **Contact Information** page, shown below:

    Note: All fields marked with an asterisk are required.

3. In **Primary Contact** type the name of your Relay Communications Hub administrator.

    In most cases this is your name.

4. In **Primary Contact Email Address** type the email address of your Relay Communications Hub administrator.

    In most cases this is your email address but could be an address created solely for the administrator function.

5. In **Contact Number** type the contact number of your Relay Communications Hub administrator.

    In most cases this is your contact number.

6. In **Service User** type the email address of your Relay Communications Hub service user.

    There is only one Service User, who is named during the establishment of your Relay Communications Hub system. This user is responsible for using the Relay Communications

Hub Desktop Client's hot folders to automatically process files and downloads print streams though the Desktop Client.

7. In **Office Address** type the first line(s) of the address at which your organization uses Relay Communications Hub.

8. In **Town/City** type the town or city in which your organization uses Relay Communications Hub.

9. In **State** type the State, County or Province in which your organization uses Relay Communications Hub.

10. In **Postal Code** type the postal/zip code of the building in which your organization uses Relay Communications Hub.

11. Click **Save**.

The information in this page is changed.

14 - Desktop Client

This section describes the functions, installation and use of the Relay Communications Hub Desktop Client. The Desktop Client uses a hot folder, which has a `\download\print streams` sub-folder where all print streams all downloaded.

Note:

- The operation of the Desktop Client operation is assigned to one named user within your company during configuration of your Relay Communications Hub by Pitney Bowes. This user is known as the Service User and is responsible for downloading all the print streams for your company. The duplication of downloaded, and subsequent printing, of print streams is avoided by allowing only one person this role. The Service User may hold additional roles.
- You may wish to automate the process of moving print streams from the Desktop Client hot folders to your printer. This is not within the remit of Pitney Bowes, however we may be able to help with this process if changes are required to your configuration of Relay Communications Hub.
- If you are using Microsoft Word to create your document files, please refer to **Configuring Microsoft Word** to ensure you achieve the best output.
- Service Users are able to upload jobs in addition to downloadingprint streams.

In this section

Hot folders

This section describes the Hot folder structure. The location of the Hot folder is defined during **configuration**.

The file structure is as follows, in the example the Hot folder `C:\RCH-Desktop Client` has been assumed, but you will need to replace this with the path to your own Hot folder:

```
C:\RCH-Desktop Client
    \upload
        \<Template name>
            \_completed
    \download
        \<Template name>
```

The `\upload` folder contains a separate folder for each Template.

Your document is placed in one of the Template folders. For example:

`C:\RCH-Desktop Client\upload\<Template name>`

Once the Template has been applied and processing is complete, a PDF of the document can be found in:

`C:\RCH-Desktop Client\upload\<Template name>\_completed`

The downloaded file can be found in the Template's sub-folder of the `\download` folder:

`C:\RCH-Desktop Client\download\<Template name>`

The Templates available to you are tailored to your companies needs. For this reason, we cannot name the Hot folder for each or what the Template does as this is a general release document and is distributed to all Relay Communications Hub Desktop Client users. We have, therefore represented the Template hot folders with the names W1 through to W9. When using your Templates, you may have a greater or lesser number available to you and the names of the folders will be more descriptive, giving the purpose of that each.

Downloading the Desktop Client

> **Note:** This function is only available to Chief Operators and Administrators.

Warning: In order to run the Desktop Client, Java JDK 1.8 must be present on your machine.

Once you have signed in to the Relay Communications Hub Web Client, follow the procedure, below:

1. Click ⚙ in the left-hand side panel.

2. Click **Download Clients**.

   This opens the **Settings** page, shown below:
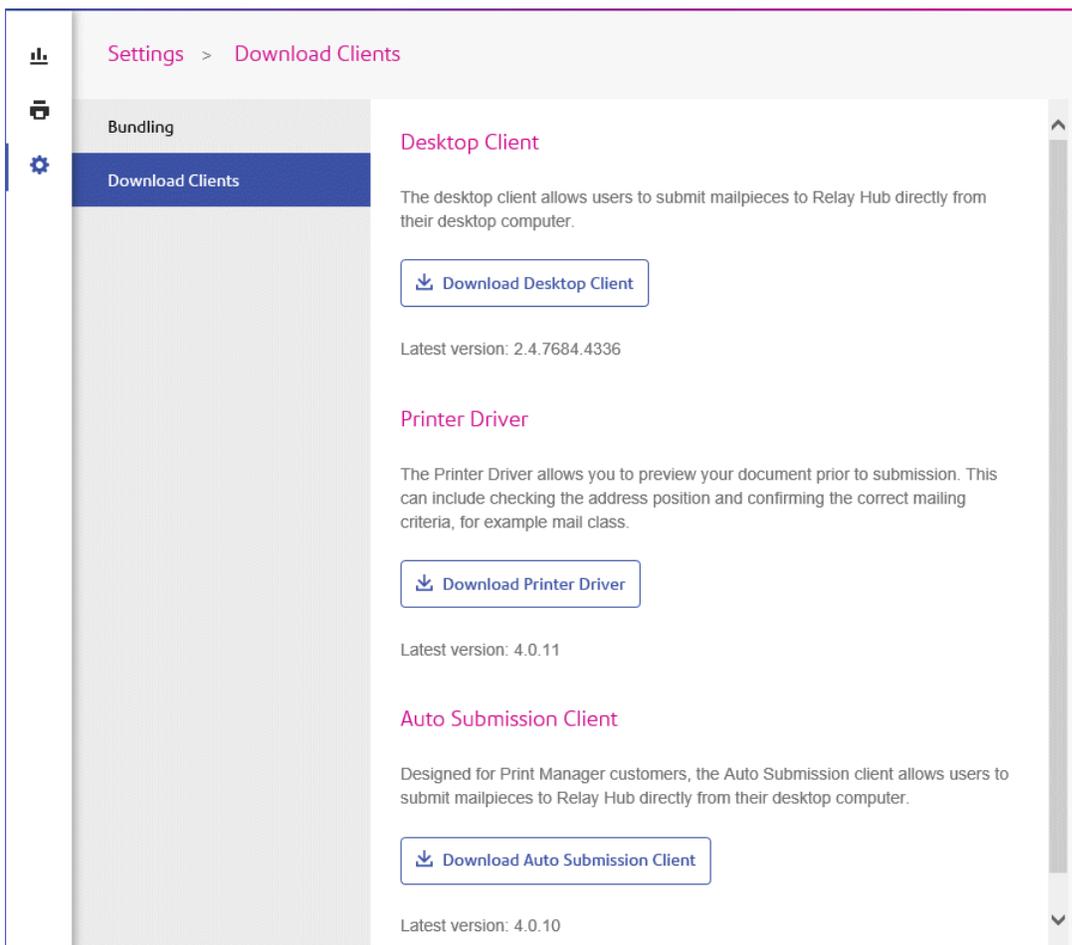
3. Click **Download Desktop Client**.

4. The following window is displayed, click **Download**.
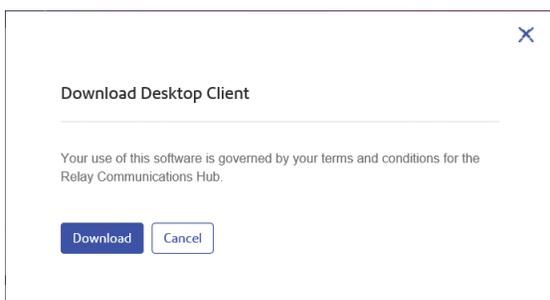
5. In the **Download** dialog, shown below for Internet Explorer, click ▾ on the **Save** button.

Do you want to open or save **relay-desktop-client-1.2.0-20151208.113650-120-package.zip** (19.8 MB) from **client.relayhub.pitneycloud.com?**   ☓   Open   Save ▼   Cancel

6. From the resultant menu select **Save as**.

   We strongly recommend that you create a new folder solely for the use of this file and its contents.

7. In the **Save as** dialog navigate to the required location and click **Save**.

Then a zip file of the install files is downloaded into the specified location.

Unpacking the Desktop Client zip file

To unpack the zip file, you need follow the procedure, below:

1. Navigate to the location in which you saved the `zip` file.

   The file name is in the following format:

   `relay-desktop-client-<version>.<date>.<time>.<build>-package.zip`

   For example:

   `relay-desktop-client-2.4.0-20180118.100634-120-package.zip`

2. Right-click on the downloaded file and from the resultant menu click **Extract here**.

   The files named similarly to the following are unzipped to the current location:

   - `log.xml`
   - `nssm.exe`
   - `relay-desktop-client-2.4.0-SNAPSHOT.jar`
   - `run.bat`
   - `run.sh`
   - `service.bat`
   - `subinacl.exe`

These files are now ready to use for installing the Desktop Client.

Installing the Desktop Client

This section describes how to install the Desktop Client. Once you have completed the installation process, the Desktop Client window is automatically opened.

Shutting down or logging out of your machine also closes the Desktop Client.

1. From the **Start** menu find the **Command Prompt**.

    For example, in Windows 10 open the following from the **Start** menu:

    All Apps | Windows System | Command Prompt

2. Right-click the **Command Prompt**.
3. From the resultant menu select **Run as Administrator**.

    This opens the **Command Prompt**.

4. Type `CD` followed by the path to the folder used when **Downloading the Desktop Client** on page 114 and press **Enter**.

    For example: `cd C:\Relay Desktop Client`

    > **Note:** There is a space between the `cd` and the `c`.

5. Type in `run.bat` and press **Enter**.

    An example is shown below:
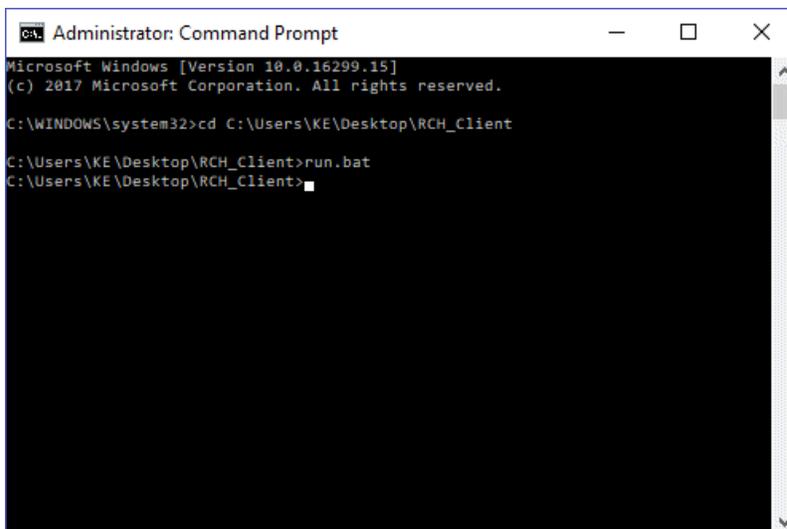
6. A window confirming successful installation is displayed. Click **OK**.

    The Desktop Client is opened:

---

7.   Click **Install Service**.

Continue with **First time sign in** on page 118

First time sign in

You must complete the fields in the Relay Communications Hub Desktop Client window in order to use the Hot folder functionality as shown below:

1. Complete the **Email**, **Password** and **Re-enter Password** fields with your Relay Communications Hub credentials.

2. From **Server URL** select the relevant option for your region from those listed:

   • Relay US Region
   • Relay CA Region
   • Relay EU Region

3. Click **Browse** and in the **Open** dialog specify hot folder to be used and click **Open**.
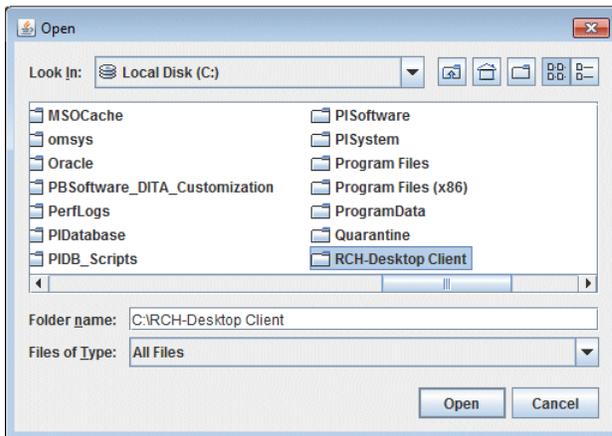
4. If you wish the service to automatically restart when the machine is started, check **Auto Start**.

5. Click **Start Service**.

6. A dialog advising that the Desktop Client is started is displayed, click **OK** to confirm.

The Hot folder is now ready to use. The **Start Service** button is now shown as **Stop Service**, which when clicked stops the service running. It can be started by clicking **Start Service**. If you did not select **Auto Start** click **Restart Service** if it has been stopped during machine shut down or other reason.

Desktop Client's Hot folders

Once you have completed the steps in the previous chapter, the Hot folder is ready for use. If you navigate to the location specified during configuration, you will find that the Hot folder contains a sub-folder called `\upload`. If you open this folder, you will find further folders, which is populated from your current template list found in the Web Client.

A sub-folder called `\download` is only visible when there are files available to download.

An example of the initial folder structure is as follows, your folders will have folder names representing your template list. In the example the Hot folder `C:\RCH-Desktop Client` has been assumed, but you will need to replace this with the path to your own Hot folder:
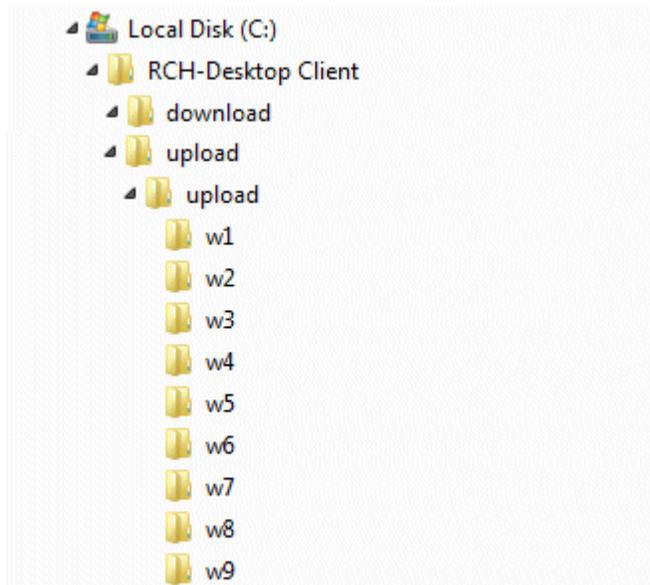
Using the upload Hot folder

If you are using Microsoft Word to generate your documents for upload to the Desktop Client, see **Configuring MS Word** on page 123 for information on how to format for best output.

Before you begin this process, the following is assumed:

- the fields described in **First time sign in** have been specified
- the `run.bat` file is running
- the document you wish to upload is complete and is in PDF format

Follow the procedure below:

1. Navigate to the required Template folder in your Hot folder's `\upload` folder.

   The Templates are described later in this section.

2. In a separate window, navigate to the location in which your document resides.
3. Either:

   - Drag and drop your document into the Template folder, or
   - Cut and paste your document into the Template folder.
   - Alternatively, you may save your document directly into the required folder.

   Once processing is complete, a PDF of your document with the Template applied can be seen in the `\_completed` folder for the Template.

4. Navigate to the `\download` folder and open its relevant Template folder.

   When it is ready, your document, with the Template applied, is available here.

Note:

It make take a little time before your document is available in this folder.

Updating the Desktop Client

To update the Desktop Client to the latest version, follow the procedure, below:

1. Using the instructions in **Downloading the Desktop Client** on page 114 download the latest version.
2. Using the instructions in **Unpacking the Desktop Client zip file** on page 116 unpack the latest version.

    Note: this must be different from the folder in which the current Desktop Client resides.

3. Using the instructions in **Installing the Desktop Client** on page 117 open the Desktop Client from current desktop client package.

    The Desktop Client is opened:

4. Ensure that no input file is being processed by the Desktop Client.

5. Click **Stop Service** and for the service to stop.

6. Navigate to the folder in which the latest Desktop Client, unpacked in step #2, resides.

7. copy the file `relay-desktop-client-X.X.X-SNAPSHOT.jar` and copy it into the folder in which the current Desktop Client resides.

8. A **Replace of Skip Files** dialog is displayed, select **Replace the file in the destination**.

9. In the **Desktop Client** click **Start Service**.

The Desktop Client is now the latest version and you may continue using it to process jobs.

Configuring MS Word

MS Word 2007/2010 needs to be configured to ensure that the page size and fonts are used.

Page Sizing

MS Word 2007/2010 needs to be configured to ensure that the page size specified during document creation is honored in Relay Communications Hub. The default MS Word 2007/2010 settings cause all documents to be sent as either size A4 or 8.5" x 11".

This setting needs to be changed to allow documents to be submitted with the correct page size. To do this, follow the procedure, below:

1. Open MS Word 2007/2010.

2. From the **File** menu select **Options**.

3. From the resultant dialog select **Advanced**.

4. Scroll down until the **Print** section is visible.

5. Deselect **Scale** content for A4 or 8.5 x 11 paper sizes.

6. Click **OK**.

This should ensure specified page sizes is honored.

Embedding Fonts

Fonts need to be embedded in your Microsoft Word 2007/2010 document to ensure they print correctly. MS Word only fully supports embedding of TrueType and OpenType fonts. Text using other font types may end up as an image rather than text which is likely to cause issues when trying to submit those documents to Relay Communications Hub. One such issue is not being able to

extract a recipient's postal address from your document and hence not being able to submit the document to Relay Communications Hub at all.

To do this, follow the procedure, below:

1. Open MS Word 2007/2010.
2. From the **File** menu select **Options**.
3. From the resultant dialog select **Save**.
4. Scroll down until the **Preserve fidelity when sharing this document** section is visible.
5. Select **All Documents**.
6. Select **Embed fonts in the file**.
7. Select **Do not embed common system fonts**.
8. Click **OK**.

All embedded font should now print correctly.

15 - Auto-Submission Console

This section describes the functions, configuration and use of the Relay Communications Hub Auto-Submission Console.

The Auto-Submission Console uses the hot folders, you define.

> **Note:**
>
> • You may wish to automate the process of moving jobs to and from from Auto-Submission Console's hot folders to your printer. This is not within the remit of Pitney Bowes, however we may be able to help with this process if changes are required to your configuration of Relay Communications Hub.
> • If you are using Microsoft Word to create your document files, please refer to **Configuring Microsoft Word** to ensure you achieve the best output.

In this section

Downloading The Auto Submission Client

Note: This function is only available to Administrators.

Once you have signed in to the Relay Communications Hub Web Client, follow the procedure, below:

1. Click ⚙ in the left-hand side panel.
2. Click **Download Clients**.

   This opens the **Settings** slide-out menu, shown below:
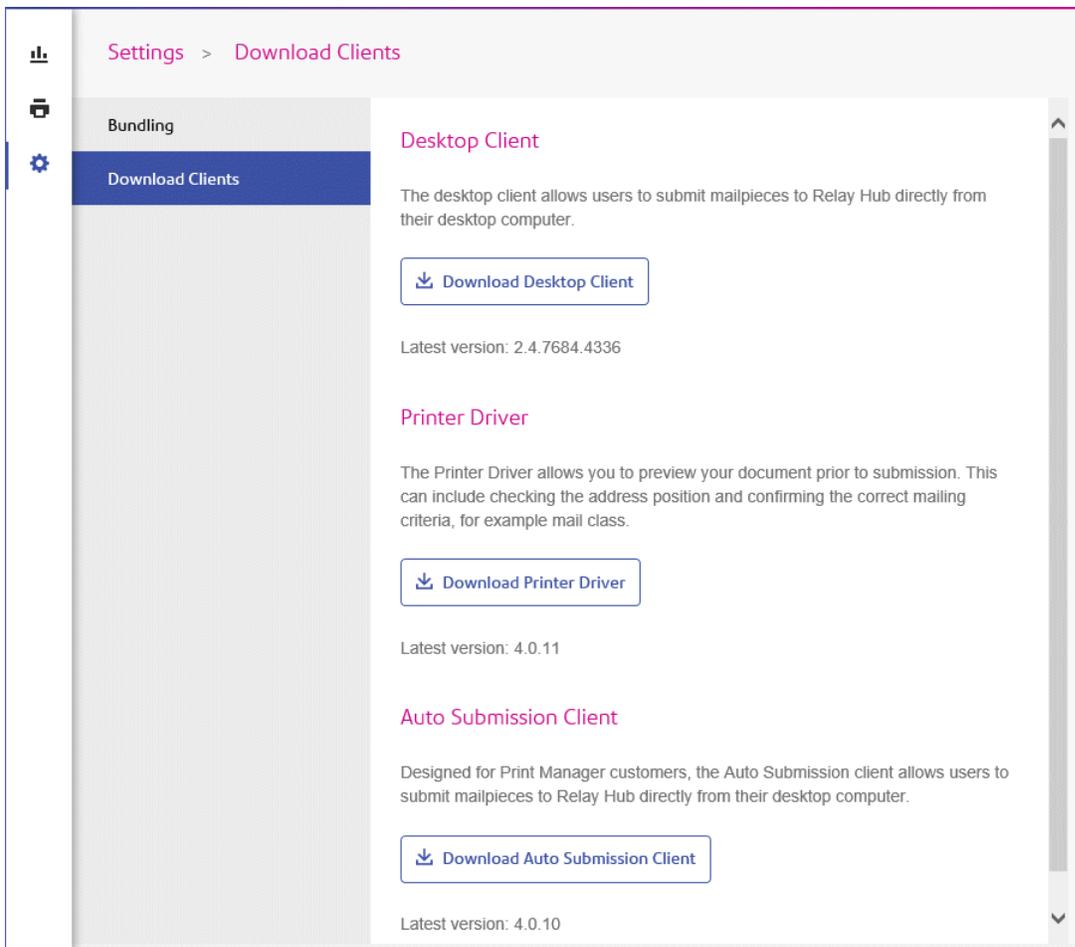
3. Click **Download Auto Submission Client**.
4. The following window is displayed, click **Download**.
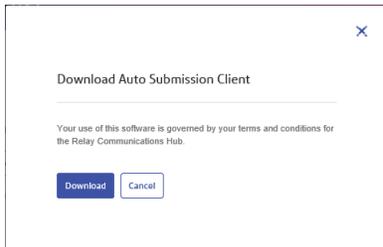
5. In the **Download** dialog, shown below for Internet Explorer, click ▾ on the **Save** button.
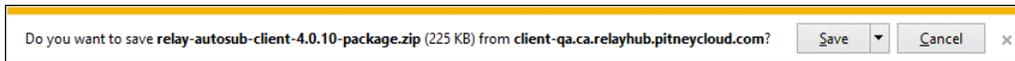
6. From the resultant menu select **Save as**.

    We strongly recommend that you create a new folder solely for the use of this file and its contents.

7. In the **Save as** dialog navigate to the required location and click **Save**.

Then a zip file of the install files is downloaded into the specified location.

Unpacking The Auto Submission Client

To unpack the zip file, you need follow the procedure, below:

1. Navigate to the location in which you saved the `zip` file.

    The file name is in the following format:

    `autosub-client-<version>-package.zip`

    For example:

    `autosub-client-4.0.10-package.zip`

2. Right-click on the downloaded file and from the resultant menu click **Extract here**.

    A files named similarly to the following is unzipped to the current location:

    `autosub-client-4.0.10.exe`

This file is now ready to use for installing the Desktop Client.

Installing The Auto Submission Client

The Auto-Submission Client requires the following, they must be installed in the order in which they are listed here.

- .Net 3.5x - Microsoft .NET Framework 3.5x if not already present. This must be installed before any of the other options.
- Adobe Acrobat Reader
- Auto-Submission service - described later in this section.

Installing the Auto-Submission Service

To install the Auto-Submission service, follow the procedure, below:

1. From the Installation Disk's contents page select **Auto-Submission service**.
2. In the **User Account Control** window click **Yes**.
3. The InstallShield detects the language being used by your Windows installation, however, you may select a different language in which the InstallShield will be displayed. Select the required language and click **OK** or just click **OK** to confirm the detected setting.
4. In **Welcome to the InstallShield** click **Next**.
5. In **License Agreement** read through the terms and select **I accept the terms in the license agreement** and then **Next**.
6. In the **Destination Folder** window click **Change**, then navigate to and select the required folder. Then click **Next**. If you do not specify a folder the software is installed to that shown in the window.
7. In **Connection Settings** you may specify a **Root URL**, this is the path to the Relay Communications Hub web client; You only need change <host> to the name of the machine on which the User website resides. Alternatively, leave the field unchanged to accept the default.
8. Also in **Connection Settings** you may specify **URL display text**, which is shown in the bottom left corner of the Auto-Submission Service Console. Alternatively, leave the field unchanged to accept the default. Click **Next**
9. In **Connection Settings** click **Proxy Settings** to open a further window.
10. For **No proxy** ensure this is unselected.
11. Leave **Use system proxy settings** blank and configure proxy settings in either Internet Explorer or **Control Panel|Internet Options**.
12. In **Manual proxy configuration** type the **IP address** or **DNS hostname of the proxy server** and the **port number** in the boxes.
13. Click **OK** to return you to the **Connection Settings** window.

14. Click **Next** in **Connection Settings** window.

15. In **Ready to Install the Program** click **Install**.

16. In **InstallShield Wizard Completed** window deselect **Launch Auto-Submission** and click **Finish**.

The Auto-Submission Service is now installed on the PC.

Configuring the Console

This section describes how to configure the Relay Communications Hub Auto-Submission service for use. The required tasks are listed in the order in which we recommend they are performed; this order makes best use of the functionality and avoids the need to revisit areas in order to add more information.

Configuring the Auto-Submission Console

The Relay Communications Hub Auto-Submission Service Console opens automatically after installation and presents the **Sign in** window. If this does not happen you can open the Relay Communications Hub Auto-Submission Service Console, by opening the Start menu selecting the following:

`Programs|Pitney Bowes|Service Console`

The Relay Communications Hub Auto-Submission Service Console is displayed.
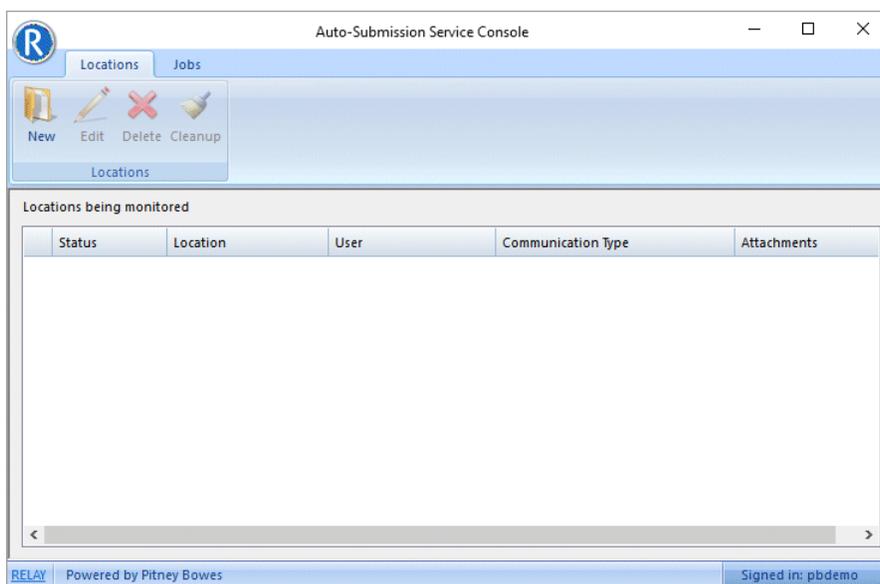
Creating a new Location

Warning:

The Relay Communications Hub Auto-Submission Service does not support encrypted PDF files. PDF files are encrypted by the Relay Communications Hub Auto-Submission Service when they are submitted to the Relay Communications Hub User Web Site.

It is the responsibility of the System Administrator/user of the system on which these Locations are created, to setup the required access rights and user permissions.

Locations are hot-folders monitored by the Relay Communications Hub Auto-Submission Service, once a PDF file is found in one of the defined locations it is automatically submitted to Relay Communications Hub for printing/fulfillment.

> **Note:**
>
> - UNC file paths are supported.
> - Only files with the extension .pdf are processed by the Relay Communications Hub Auto-Submission Service.

To create a new location, follow the procedure, below:

1. In the ribbon click **New**. The **Location Configuration** window is displayed:

2. Click **Browse**.
3. Navigate to and select the required folder and click **OK**.

4. In **Filter** type a prefix which identifies PDF files for automatic submission, for example, the prefix "FM" automatically submits files with a filename starting with "FM" to Relay Communications Hub. Any file without that prefix is ignored.

5. In **Communication Type** you can leave as **Auto-detect** or you may choose one of the listed options.

   • **Email from page** uses the email address found on the page/mail piece.
   • **Single Letter - Print Manager** prints and mails the document.
   • **Email from look up** uses a predefined look up table from which the email address is taken.
   • **Archive** archives the document.

6. To add attachments, click **External Attachments**.

   This opens the following:
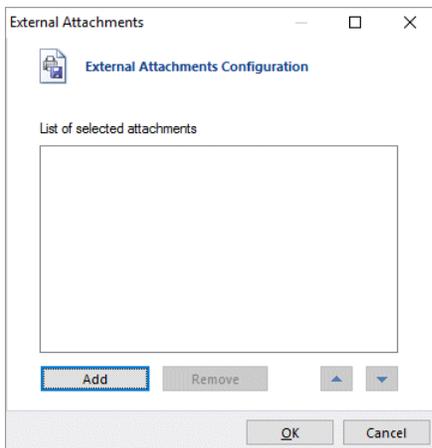
   a) Either select the one required from the list, or click **Add**. From the **Open** dialog, navigate to and select the one required.

7. Click **OK**.
   You are returned to the **Location Configuration** dialog.

8. If required, click **Cleanup Options**.

   This opens the following:
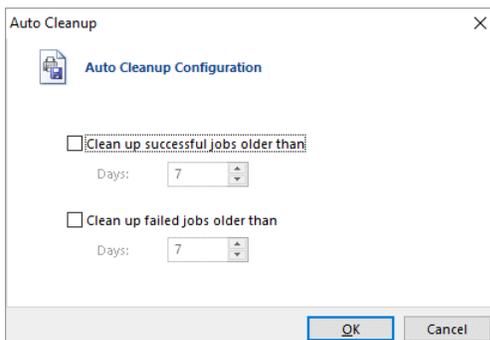
   a) Select **Clean up successful jobs older than** and specify a number of days.

    b) Select **Clean up failed jobs older than** and specify a number of days.

    c) Click **OK**.

        You are returned to the **Location Configuration** dialog.

9. Click **OK**.

You are returned to the **Service Console** where the new location is shown.

Editing an existing location

To edit an existing location, follow the procedure, below:

1. If necessary, click **Locations** to display **Location** list.

2. Select the required location and click **Edit**.

3. Make the required changes. The fields shown in the **Edit Locations** window are the same as for the **New Locations** window.

4. Click **OK** to save the changes.

The updated location is now available in the Console.

Deleting an existing location

To delete an existing location, follow the procedure, below:

1. If necessary, click **Locations** to display **Location** list.

2. Select the required location and click **Delete**.

3. You are prompted to confirm. Click **Yes**.

This location is deleted and is no longer available from the **Locations** list.

Cleaning up a location

To clean up an existing location, follow the procedure, below:

1. If necessary, click **Locations** to display **Location** list.

2. Select the required location and click **Cleanup**.

3. You are prompted to confirm. Click **Yes**.

This files in this location are deleted.

Automatic Submission

This section describes how to automatically submit documents to Relay Communications Hub and how to view those successfully submitted and those that have failed.

> **Note:**
>
> Before you begin, at least one **Location** must have been created.

Automatically submitting documents

To begin auto-submission of documents, place the PDF file of the required document into one of the previously created locations. This may be done using one of the following methods:

- Drag-and-drop (this is the preferred method)
- Press <**Ctrl**> - drag-and-drop (this is a copy function and should always work)
- **Copy** and **paste**, either using context menu options or keyboard shortcut keys.

> **Note:**
>
> - If the file is NOT accessible by the same account under which the Windows Services are running then dragging and dropping will NOT work.
> - Running the service as a Local System Account and dragging and dropping files WILL work, although hot folders cannot be used across a network.

The Location is polled by the software.

- If processed, the PDF file is moved to the Submitted folder, a sub folder of the defined location.
- If the job cannot be processed, it remains within the root folder and is given a suffix of '-F' (for failed).

To view the list of submitted documents click **Jobs** in the ribbon. This is shown below:
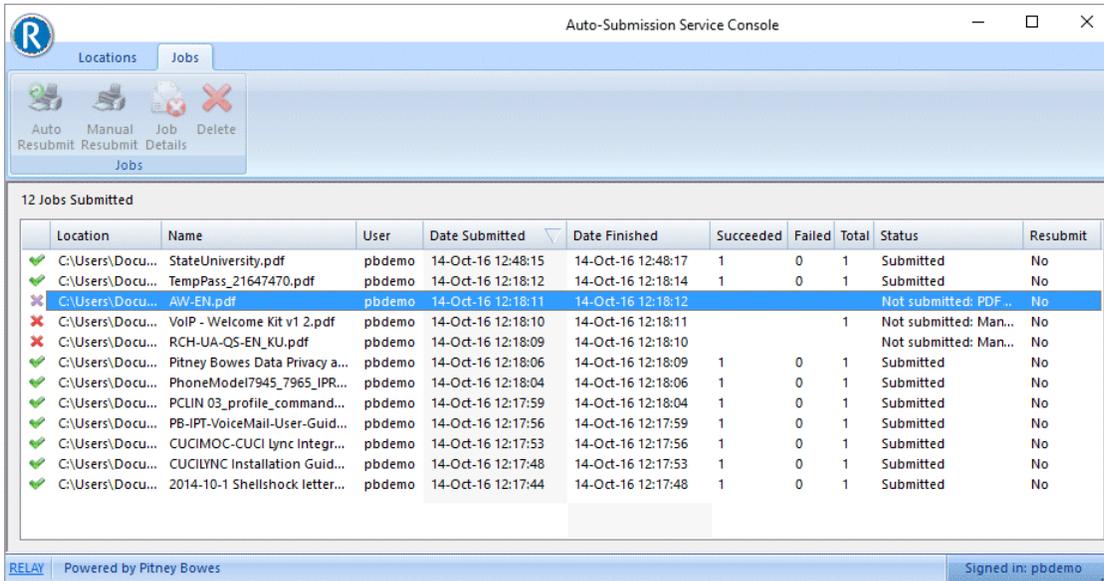
The **Status** column contains an error message for documents that have failed. Once the error has been corrected, a job can be resubmitted. The Status column contains an error message for documents that have failed. Once the error has been corrected, a job can be resubmitted.

Viewing Submitted Jobs

The list of submitted jobs can be viewed by clicking **Jobs** in the ribbon, the page is shown next. The **Status** column contains an error message for documents that have failed. Once the error has been corrected, a job can be resubmitted.
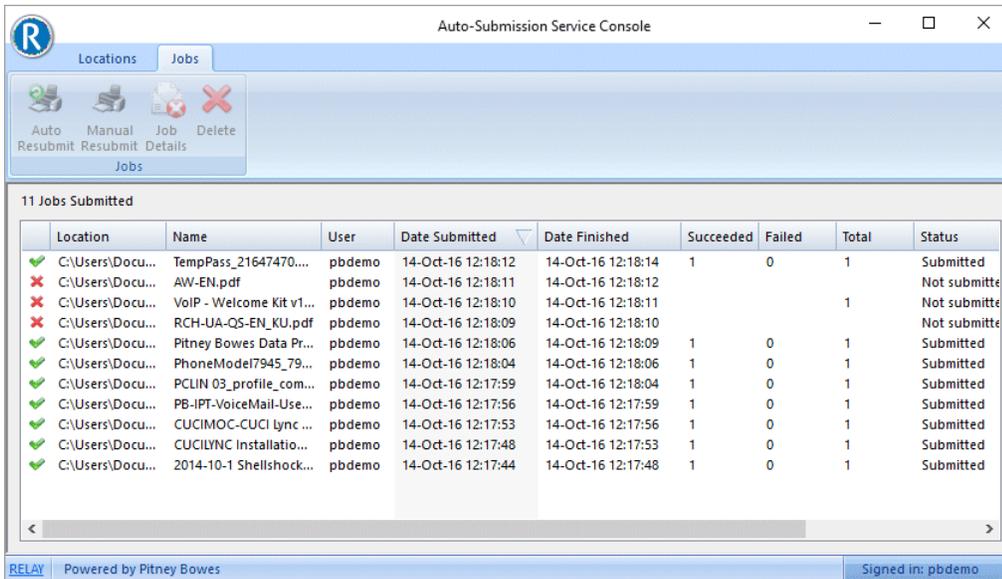
❌   Indicates a job that failed submission.

✔   Indicated a successfully submitted job.

Click on a column to sort it in ascending or descending order.

Click on a job name to open it as a PDF.

Viewing details of failed mail pieces

The processing of a document may fail for a number of reasons, if this happens it may be resubmitted to Relay Communications Hub once the reason for that failure has been addressed. See **Error Messages** for a list of errors messages that may arise together with steps to take to solve the problem.

Initially, the **Job Details** icon in the ribbon is disabled; it is only enabled once a mail piece has failed. On the occasion of the first submission failure a new folder is created below the submission hot folder (Location) the name of which is in the following format:

<Job Description>_<date>-<time>

Where the date and time are the date and time the job was submitted. The folder contains a PDF of each failed mail piece. All subsequent submission failure are saved to this location.

To view the submission details of your job, follow the procedure, below:

1. If necessary, click the **Jobs** icon to open to the **Jobs Submitted** table.
2. Highlight the required document and click **Job Details**.

   The **Job submission details** window is opened. This lists the failed mail pieces within the job; mail pieces that have not failed are not listed.

   The **Index** and **File name** fields may be empty, this only occurs in the case of a warning and usually affects the entire job, for example, the job may need authorization.

3. Click **Cancel**.

The **Job submission details** is closed and you are returned to the **Jobs Submitted**.

Automatically resubmitting a job

To automatically resubmit a job, follow the procedure, below:

1. If necessary, click **Jobs** in the ribbon to open to the **Jobs Submitted** table.
2. Highlight the required document.
3. Click **Auto Resubmit** in the ribbon.

This job can now be seen in the **Job** list with a status of **Submitted**.

Manually resubmitting a job

To manually resubmit a job, follow the procedure, below:

1. If necessary, click **Jobs** in the ribbon to open to the **Jobs Submitted** table.
2. Highlight the required document.
3. Click **Manual Resubmit** in the ribbon. The document is displayed using the installed PDF reader, for example, Adobe Reader.
4. Click to print the document.
5. Select **Relay Communications Hub** as the printer.
6. Click **OK**.
7. Return to the **Auto-Submission Service Console** and highlight the job.
8. Click **Manual Resubmit**.

The document **Status** changes to **Manually resubmitted** and the **Resubmit** value changes to **No**.

Error Messages

Error messages displayed in the Status field of the Job History. The text of the message is shown in the **Status** column of the **Jobs Submitted** table. This section gives the message text followed by the steps recommended to solve the problem.

Error messages and the steps recommended to resolve any problems are listed, these are in alphabetical order for ease of use:

A Minimum configuration has not been set for this user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have at least basic permissions set. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
ActiveX Control not installed	The document has NOT been submitted but CAN be resubmitted.
	Please reinstall the application or contact your administrator.
Ad-Hoc Attachment selected invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the AdHoc Attachment. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Attachment Download Failure	The document has NOT been submitted but CAN be resubmitted.
	Ensure that the attachment is in the specified location and resubmit the job from the Auto-Submission Service Console.
Could not apply all group settings due to restrictions in available choices	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the options you have selected. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Could not calculate price for the item	The document has NOT been submitted but CAN be resubmitted.
	Advise your Relay Communications Hub Administrator.
Could not create PDF file for submission	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Could not make temporary copy of pdf file	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Could not read job config	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Could not retrieve a GUID from the server	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Could not write job config	The document has NOT been submitted but CAN be resubmitted.
	Check access permissions for the folder to which the Job Config files are being written.
Create Attachment PDF Failure	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Critical error occurred while processing the document	The document has NOT been submitted but CAN be resubmitted.
	Contact your Relay Communications Hub Administrator.
Data from the server is invalid. User probably doesn't have access rights	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have access rights. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Default reserved areas have been overwritten in page	The document has NOT been submitted but CAN be resubmitted.
	Amend document to ensure that reserved areas are not overwritten and resubmit.

stock, attachments, external PDFs or Ad-hocs

Electronic Attachment selected invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the Electronic Attachment. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Envelope reserved areas have been overwritten in page stock	The document has NOT been submitted but CAN be resubmitted.
	Amend document to ensure that reserved areas are not overwritten and resubmit.
Envelope Type invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the Envelope Type. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Error checking for print driver	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
Error requesting Print Center IDs from the server	The document has NOT been submitted but CAN be resubmitted.
	The document CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
Error sending failed submission email	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
External PDF attachment could not be found	The document has NOT been submitted but CAN be resubmitted.
	Ensure that the External PDF attachment is in the specified location and resubmit the job from the Auto-Submission Service Console.
File Upload failure	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
File Upload failure	The document has NOT been submitted but CAN be resubmitted.
	Ensure that the Relay Communications Hub User website is available and resubmit the job from the Auto-Submission Service Console.
Get Settings Group Failure	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator

Incorrect version of PDFCreactiveX.dll is installed	The document has NOT been submitted but CAN be resubmitted. Please reinstall the application or contact your administrator.
Insufficient funds for the job. Top up required	The document has been submitted and CANNOT be resubmitted. Purchase more credit.
Invalid hash code on Job Config	The document has NOT been submitted but CAN be resubmitted. Contact the Relay Communications Hub Administrator.
Invalid Login Credentials	The document has NOT been submitted but CAN be resubmitted. Ensure that the User Name and Password are correct.
Invalid Login Credentials or Invalid URL	The document has NOT been submitted but CAN be resubmitted. Contact the Relay Communications Hub Administrator.
Job Option Send date is in the past	The document has NOT been submitted but CAN be resubmitted. Select a send date in the future and submit again.
Job submission was canceled by user	The document has NOT been submitted but CAN be resubmitted. You have canceled the job. Continue as you see fit.
Mailing Service invalid for user	The document has NOT been submitted but CAN be resubmitted. Check with the Relay Communications Hub Administrator that you have permission to use the Mailing Option. If the Administrator grants permission, resubmit the job from the Auto-Submission Service Console.
Manually Resubmitted	The document has been submitted and CAN be resubmitted. No action required, job has been resubmitted successfully.
Monochrome/Color option invalid for user	The document has NOT been submitted but CAN be resubmitted. Check with the Relay Communications Hub Administrator that you have permission to use the option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Network Connection Problem	The document has NOT been submitted but CAN be resubmitted. Contact the Relay Communications Hub Administrator.
No address found, unable to send	The document has NOT been submitted but CAN be resubmitted. Ensure that an address appears in the job and that it is within the predefined area. Once corrected resubmit job.

No mail pieces have a price

The document has NOT been submitted but CAN be resubmitted.

Contact the Relay Communications Hub Administrator.

No mail pieces have an address

The document has NOT been submitted but CAN be resubmitted.

Edit the mail piece ensuring that each one has an address and resubmit.

No Print Center or address extraction has failed

The document has NOT been submitted but CAN be resubmitted.

Define the Print Center, if you are unable to do so, contact you Relay Communications Hub Administrator. Resubmit the job once a Print Center has been defined.

No valid Tax Rate has been setup

The document has NOT been submitted but CAN be resubmitted.

Contact the Relay Communications Hub Administrator.

Notification option invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use the Notification Option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

NULL value in Database

The document has NOT been submitted but CAN be resubmitted.

An attachment is missing in the Admin Server database. Contact the Relay Communications Hub Administrator.

Option choices require authorization before mailing will occur

The document has NOT been submitted but CAN be resubmitted.

Your job will appear in My Documents with a "No" in the Authorized column. Once this has been authorized by the Relay Communications Hub Administrator the job will be processed.

Overlay Download Failure

The document has NOT been submitted but CAN be resubmitted.

Contact the Relay Communications Hub Administrator.

Relay Communications Hub Server Offline

The document has NOT been submitted but CAN be resubmitted.

Contact the Relay Communications Hub Administrator.

PDF File is encrypted and cannot be processed

The document has NOT been submitted but CAN be resubmitted.

Recreate the PDF without encryption and resubmit the job from the Auto-Submission Service Console.

PDF Paper Size is not supported

The document has NOT been submitted but CAN be resubmitted.

Recreate the PDF using a supported paper size and resubmit the job from the Auto-Submission Service Console.

Pre-Pay settings incomplete on Relay Communications Hub Server	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
Pre-printed insert for Ad-hoc invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the ad-hoc Pre-printed insert. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Pre-printed Insert selected invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the Pre-printed insert. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Print Center has not been defined by the Administrator on the target Relay Communications Hub server	The document has NOT been submitted but CAN be resubmitted.
	Contact the Relay Communications Hub Administrator.
Reserved areas have been overwritten	The document has NOT been submitted but CAN be resubmitted.
	If Auto Submission has been configured to abort jobs in which envelope and/or default reserved areas have been overwritten the submission fails.
On the first occasion a new folder is created below the submission hot folder the name of which is in the following format:	`<Job Description>_<date>-<time>`
	Where the date and time are the date and time the job was submitted. The folder contains a PDF of each failed mail piece.
	The document has NOT been submitted but CAN be resubmitted.
	It may be that a PDF of multiple mail pieces is submitted in which some have envelope and/or default reserved areas which have been encroached/overwritten. In this case only the mail pieces with the encroached/overwritten reserved areas fail, the others are submitted as usual.
Resubmitted	The document has been submitted but CAN be resubmitted.
	No action required, job has been submitted successfully.
Send Date option invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use the Send Date option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Send Date Specified is invalid	The document has NOT been submitted but CAN be resubmitted.
	Check that the date selected is correct, then resubmit the job from the Auto-Submission Service Console.
Settings Group Electronic Attachment selected invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Envelope Type invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Mailing Service invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Monochrome/Color option invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Notification option invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Pre-printed Insert selected invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.
Settings Group Send Date option invalid for user	The document has NOT been submitted but CAN be resubmitted.
	Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants

permission resubmit the job from the Auto-Submission Service Console.

Settings Group Sheet 1 page stock invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Settings Group Sheet 2 page stock invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Settings Group Simplex/Duplex option invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use this option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Sheet 1 page stock invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use the Stock requested for sheet 1. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Sheet 2 page stock invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use the Stock requested for sheet 2. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Simplex/Duplex option invalid for user

The document has NOT been submitted but CAN be resubmitted.

Check with the Relay Communications Hub Administrator that you have permission to use the option. If the Administrator grants permission resubmit the job from the Auto-Submission Service Console.

Some of the default reserved areas have been overwritten

The document has NOT been submitted but CAN be resubmitted.

Recreate job ensuring that Reserved areas have not been overwritten and resubmit the job from the Auto-Submission Service Console.

Some of the envelope reserved areas have been overwritten	The document has NOT been submitted but CAN be resubmitted.
	Recreate job ensuring that Reserved areas have not been overwritten and resubmit the job from the Auto-Submission Service Console.
Submission Client Missing	The document has NOT been submitted but CAN be resubmitted.
	Reinstall the software and automatically or manually resubmit the job from the P/I OfficeMail Auto-Submission Service Console.
Submitted	The document has been submitted but CANNOT be resubmitted.
	No action required, job has been submitted successfully.
Submitted with errors	The document has NOT been submitted but CAN be resubmitted.
	No action required, job has been submitted successfully, although you may want to check the job and if unsatisfactory resolve the issues and resubmit through the Auto-Submission Service Console.
Submitted with warnings	The document has been submitted and CANNOT be resubmitted.
	No action required, job has been submitted successfully, although you may want to check the job and if unsatisfactory resolve the issues and resubmit through the Auto-Submission Service Console.
The URL used for UserService is invalid	The document has NOT been submitted but CAN be resubmitted.
	Ensure that you have entered the correct URL. If you arrived at this message through a link, see your Relay Communications Hub Administrator.
There are too many sheets or the inserts are too large for the chosen envelope size	The document has NOT been submitted but CAN be resubmitted.
	Either increase the envelope size or decrease the number of sheets and inserts that must fit into the specified envelope and resubmit the job from the Auto-Submission Service Console.
This version of PrintDlg is no longer supported. Please visit the Relay Communications Hub website to download the latest version	The document has NOT been submitted but CAN be resubmitted.
	Visit the Relay Communications Hub website to download the latest version.
Unable to send: One or more missing address	The document has NOT been submitted but CAN be resubmitted.
	Correct address field in the original document and resubmit.
Upload File not found	The document has NOT been submitted but CAN be resubmitted.

The file being submitted cannot be found in the directory. Resubmit the file to the directory.

16 - Printer Driver Installation

This section describes how to install the Printer Driver. During installation you may find that an older version of the software exists on your PC, a section on removing it has been provided; you can then install the latest version.

In addition, the presence of Microsoft .NET is detected during installation. This is required by the Printer Driver and if not found the InstallShield prompts you to install it. If this happens, we recommend that you click **Yes** and continue with the installation.

> **Note:** If installing on Windows 7, the Printer Driver must be installed as an administrator. See **Running Internet Explorer as an Administrator**.

In this section

Downloading The Printer Driver

Once you have signed in to the Relay Communications Hub Web Client, follow the procedure, below:

1. Click ⚙ in the left-hand side panel.

   The **Settings** slide-out menu is opened.

2. Click **Download Clients**.

   This opens the **Download Clients** slide-out menu, shown below:
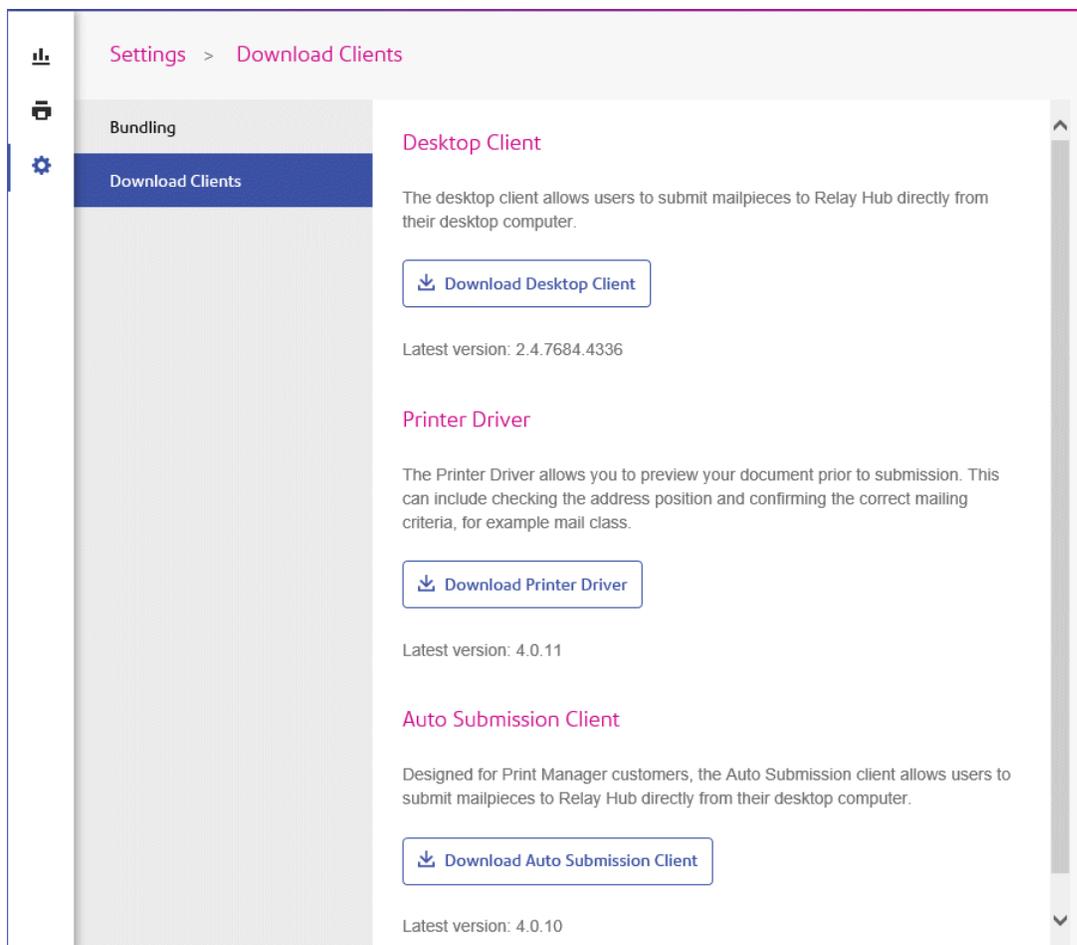
3. Click **Download Printer Driver**.
4. The following window is displayed, click **Download**.
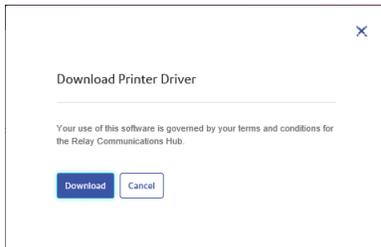
5. In the **Download** dialog, shown below for Internet Explorer, click ⬛ on the **Save** button.

6. From the resultant menu select **Save as**.

   We strongly recommend that you create a new folder solely for the use of this file and its contents.

7. In the **Save as** dialog navigate to the required location and click **Save**.
   Then a zip file of the install files is downloaded into the specified location.

8. Extract the zip file to a local folder.

   The InstallShield is unzipped to a folder called `relay-printer-driver-x.x.xx-package`, where x.x.xx is the version number.

Installing the Printer Driver

To install the Printer Driver follow the procedure below:

1. Navigate to the `relay-printer-driver-x.x.xx-package` folder.

2. Double-click the file `Relay(TM) Communications Hub.exe`.

3. If Microsoft .NET is not detected on the PC, the window below is displayed:

   Click **Yes** and following the instructions.

4. In **Welcome to the InstallShield Wizard**, click **Next**.

5. In **License Agreement** read the agreement and select **I accept the terms in the License Agreement** and click **Next**.

6. In **Advanced Settings**, either:

   • Click **Next** to continue with the default installation and continue to step #8, or,
   • Click **Advanced Settings**, to open the **Configure Proxy Settings** window .

7. In **Configure Proxy Settings** select one of the following fields and click **OK**.

   - **No proxy** to use no proxy server.
   - **Use system proxy settings** to configure proxy settings in either **Internet Explorer** or **Control Panel | Internet Options | Connections | LAN settings | Proxy server**.
   - **Manual proxy configuration** to type the IP address of the proxy server and the port number in the boxes provided.

8. In **Ready to Install the Program** window click **Install** .
9. Click **Finish**
10. The **InstallShield Wizard Completed** window is displayed. Click **Close**.

The Printer Driver is now installed and ready to use on your PC.

Uninstalling

This section describes how to uninstall the Printer Driver to leave you with a "clean" system.

To uninstall the Printer Driver follow the procedure below:

1. From the Windows **Start** menu, open the **Control panel | Uninstall a program**.
2. In **Uninstall** or **change a program**, whichever is displayed, select **Relay Communications Hub** from the list and click **Uninstall**.
3. The Relay Communications Hub InstallShield starts. Proceed through the uninstall by clicking **Next** through the screens until you reach the **Program Maintenance** screen select **Modify**.
4. In the **Custom Setup** screen deselect **Relay Communications Hub** by clicking on the down arrow adjacent to it and selecting **This feature will not be installed** before continuing.
5. Continue to follow the instructions until the installation is complete.

The selected component is removed from your machine.

Updating the Printer Driver

To update the Printer Driver, follow the procedure below:

1. Open the **Control Panel**.
2. Select **Programs and Features**.

   The **Uninstall or change a program** window is opened.

3. Scroll down and select **Relay(TM) Communications Hub**.
4. Click **Uninstall**.

5. You are prompted to confirm the uninstall, click **Yes**.

6. Restart your PC.

7. Use the instructions in **Downloading The Printer Driver** on page 147 to download the latest version.

8. Use the instructions in **Installing the Printer Driver** on page 148 to install it.

The updated Printer Driver is now ready to use.

17 - Creating A Job

This section describes how to create a job by uploading documents to which the Templates are applied.

> **Note:** For Print Manager companies, the option to submit job from the user interface is only available to the Service User.

In this section

Creating Your Job

Creating a job is the process of applying a Template to a data file. To do follow the procedure, below:

1. In the Icon panel on the left-hand side of the window, click ⊕ to open the following:
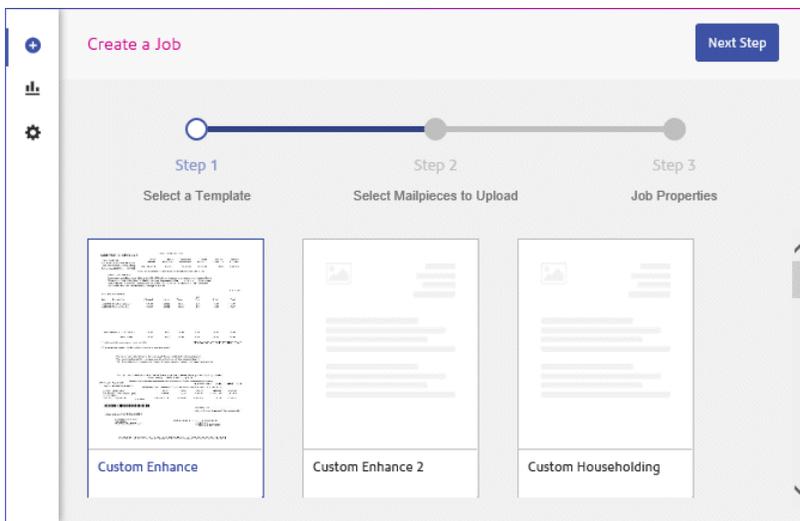
2. Select the required template from those shown in the page.
3. Click **Next Step**.

   The following is displayed:
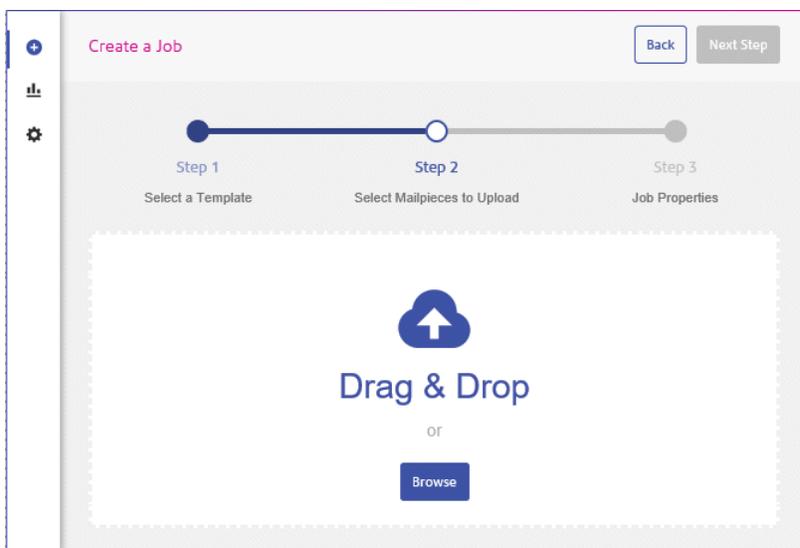
4. Either:

   • Drag and drop the files into the panel, or

• Click **Browse** to navigate to and select the ones you need.

The name and size of your file are then shown, below:
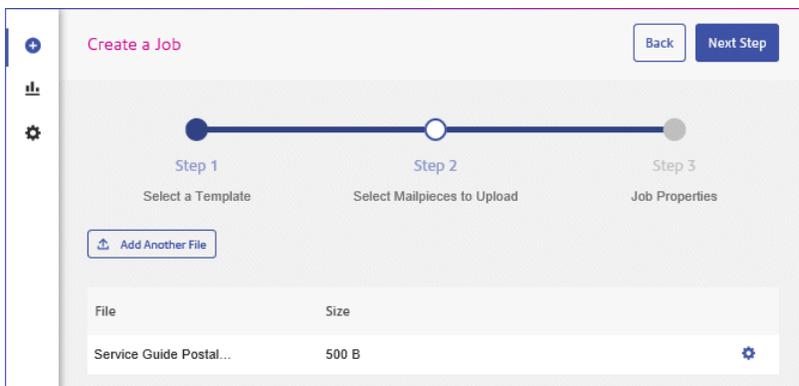
5. If you wish to add a further file click **Add Another File** and repeat step #4.

   Repeat for all the files you wish to add.

   > **Note:** At this point you can delete any files listed as described in **Deleting a File** on page 154

6. Click **Next Step**.

   The following is displayed:
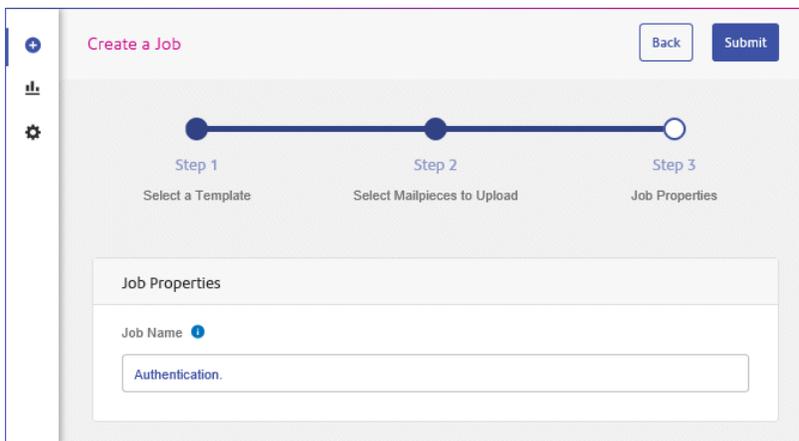
7. Click within the **Job Name** field and give the job a meaningful name.
8. Click **Submit** in the top right of the page.
9. A message is displayed advising that you job was successfully submitted.
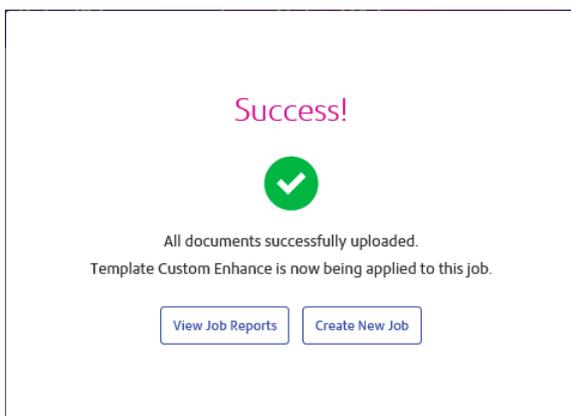
10. Click the required option.

Your job has been submitted and will be available in the **Job Reports** page.

See **Viewing Job Reports**, which also contains a description on **Downloading output files** on page 166.

Deleting a File

While creating a job, you upload a file which, for whatever reason, you need to remove. To do this:

1. In the same line as the file you wish to remove click ⚙
2. From the menu displayed select **Delete**.
3. A message is displayed requiring that you confirm this action. Click **OK**.

Your file is then removed.

18 - Viewing Job Reports

Job Reports gives you access to the jobs you have submitted. This is opened by clicking ⊥ in the side bar. The jobs are listed in chronological order with the most recent job to be submitted at the top. By default the first job in the list is selected and if it has completed processing, its Job Summary is displayed.

Job Reports provides you with the ability to:

• Search for jobs by specific criteria
• Filter jobs by date or a range of dates
• View job summaries
• Export a report of all your jobs in `csv` format
• View an email deliverability report

> **Note:** Jobs printed through the Printer Driver by the same user and using the same Job Options are merged and are displayed in the Jobs List as one job.

If you are a not using a centralized print room to process your jobs, a further two operations are available:

• Download a report of undelivered emails
• Delete jobs that are no longer required

In this section

Job Reports

Job Reports lets you view a list of the jobs that have submitted for printing by users.

Immediately after uploading a job it is shown as in print queue; no data is shown in the **Job Summary** section. Click 🔄 to ensure the list is up-to-date.

The jobs are listed in chronological order with the most recent job to be submitted at the top. By default the first job in the list is selected and when has completed processing, its **Job Summary** is displayed.

The **Job Reports** page is shown below:
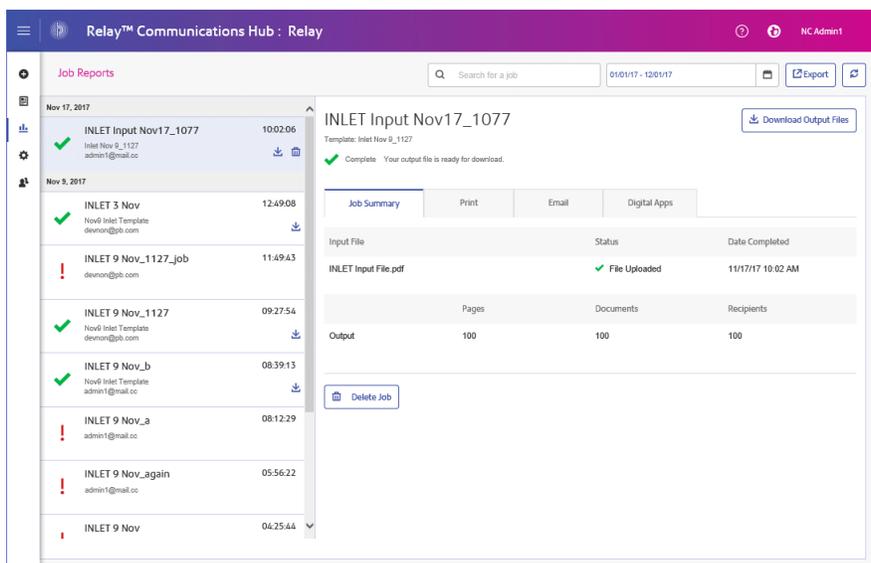
The left-hand panel gives a scrollable list of jobs in the order in which they were submitted, newest to oldest.

The status of your job can be one of the following:

🖨️	Job is in the print queue. It is waiting to be printed and/or emailed and/or archived. Please contact your central print room if this status does not change to completed.
🖨️	Job is printed.
✔️	Job has been mailed. This job is now complete.
❗	Job error. Speak with your Print Room Operator.

Job Summary

Once a job has completed processing, the **Job Summary** is displayed in the right-hand panel. By default, the Job Summary is shown for the first job in the left-hand panel. Select another job to open its summary. All jobs have a summary, regardless of their status. An example is shown next:
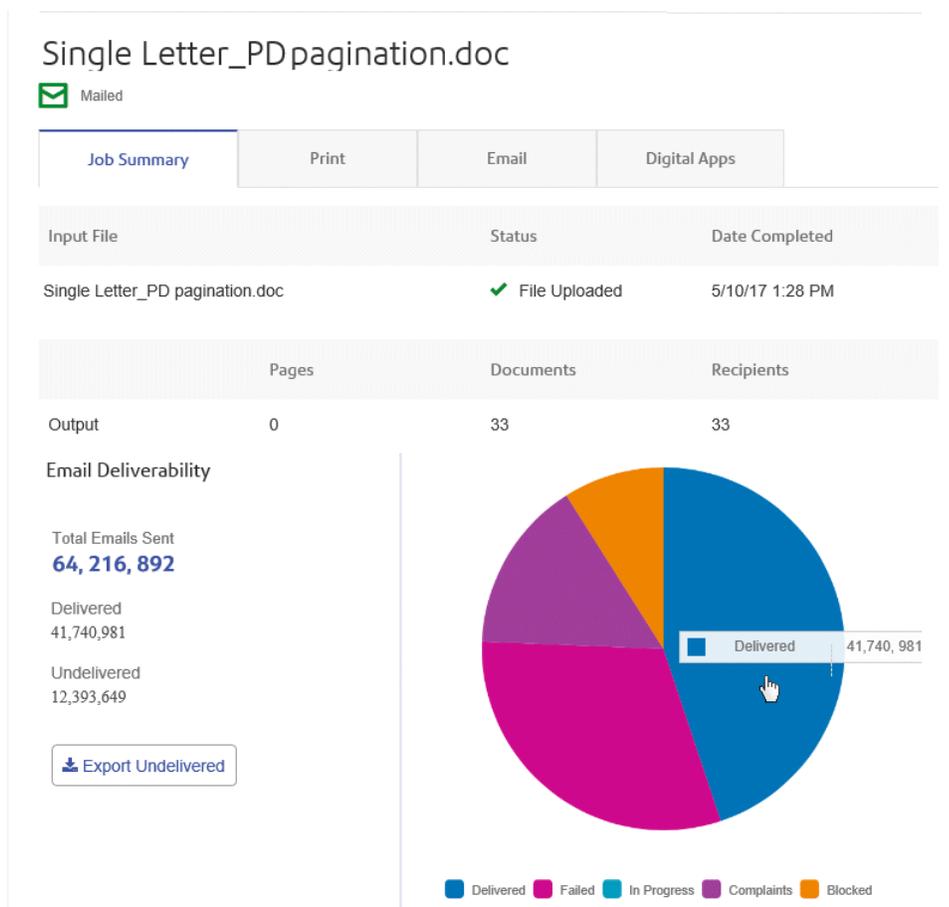
The information shown is as follows:

Input File	The name of the input file. In the example, this is `Single Letter_PD pagination.doc`
Status	The status of the job, as described in **Job Summary** on page 157.
Date Completed	The date on which the job completed processing, that is, printed, emailed, or passed to a digital app.
Pages	The number of pages output to the above. This may not be relevant in all cases.

Documents	The number of documents/mail pieces output.
Recipients	The number of recipients for those documents/mail pieces.

Mail merged documents are presented as one job in the **Job Summary**. For example, if a user submits a number of jobs with the same Job Options through the Printer Driver, these appear in the Job Reports page as one job.

The remainder of the information given in the Job Summary is not the same for all job types or all statuses.

Job Summary details

Once a job has completed processing, the **Job Summary** is displayed in the right-hand panel. By default, the Job Summary is shown for the first job in the left-hand panel. Select the job to open its summary.

All job have a summary, regardless of their status. An example is shown below:

Details	Gives the name of the **Template** used, the **User** name of the person submitting the job and the **Department** to which that user belongs.
	This information appears for jobs of any status.
Input files	These are the files you submitted to Relay Communications Hub. The number of files is shown in parenthesis.
	This information appears for jobs of any status.
Output Files	These are the files generated by Relay Communications Hub from your input files and your templates. The number of files is shown in parenthesis.
	This information appears for jobs of any status.
Email Deliverability	If you used one of the emailing templates, a chart shows what happened to the emails. A spreadsheet giving more information may be downloaded by clicking **Email Deliverability**.
	This information appears for jobs of any status. This is described in greater detail in **Email Deliverability report** on page 168.

In addition, the **Email** tab is shown for any jobs using an emailing Template.

Print, Email and Digital Apps tabs

The **Print**, **Email** and **Digital Apps** tab information provide the same type of information. The **Email** tab is shown below, as an example:

The Job Summary has four tabs, as follows:

Job Summary	This is the first page displayed when a job is selected from the list in the left-hand side of the page. It provides the information described in **Job Summary** on page 157.

Print

Lists the documents/mail pieces processed for a Recipient (Recipient Reference columns helps in identifying them uniquely). It gives the date and time that the job completed. In addition, the status of each mail piece is given.

For Maileva, mail pieces that were meant to be sent digitally but were finally printed and sent by traditional mail, move to this tab after confirmation from Maileva. This can happen if a customer is not signed up with Maileva for digital communication.

> **Note:** Initially these mail-pieces are shown in the **Digital Apps** tab.

Mail pieces which failed while processing appear in Error state. The reason of failure is indicated, as shown below:

5200010 : L'adresse du destinataire n'est pas valide. Vous devez obligatoirement avoir renseigné les Noms / Sociétés et les Codes Postaux et Villes de vos correspondants. Consultez le site web de Maileva pour bien rédiger les adresses.

Error ⓘ
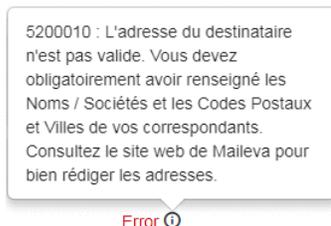
Email

Lists the documents/mail pieces processed by Recipient Reference and gives the date and time that the job completed. In addition, the status of each mail piece is given.

Digital Apps

The **Digital Apps** tab is for those mail pieces delivered to the end user electronically, even by the third party providers. For Maileva, if a customer has signed up for digital delivery with Maileva and their company is setup to send documents to Maileva using DIGITAL MODE, then mail pieces/documents are not printed but are delivered electronically to that user.

This tab lists the documents/mail pieces processed for a Recipient (Recipient Reference columns helps in identifying them uniquely). It gives the date and time that the job completed. In addition, the status of each mail piece is given. Status of the mail piece is returned from the third party providers and is shown in this tab. In the case of Maileva, which is supported for users in France only, some of the mail pieces may not be sent electronically, but are printed and sent by traditional mail. The status of these mail pieces then shows in the **Print** tab.

For information on connecting to Maileva or other Digital Apps once they become available, contact Pitney Bowes.

To find a specific mail piece or organize those displayed, see:

- **Searching for Mail Pieces** on page 161
- **Filtering Documents By Status** on page 160
- **Sorting Mail Pieces** on page 161

Filtering Documents By Status

You can filter the documents/mail pieces displayed as follows:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.

2. Click ▼All⌄ .

3. Select one of the following:

    - All
    - Processing
    - Complete
    - Error

        Note: The number in parentheses beside each options gives the number of documents/ mail pieces for that option.

A filtered list of mail pieces is displayed.

Searching for Mail Pieces

To search for a mail piece, follow these steps:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.

2. Click in the **Search for a job** box, shown below:

    🔍 Search in this report

3. Type in the letters for which you wish to search. To find "Mrs Smith", you need type only part of the text you wish to find, for example, "Smi".

4. To begin the search, either:

    - Click 🔍, or
    - Press **Enter**.

To return to the previous list of jobs, delete the characters in the **Search for a job** box.

Sorting Mail Pieces

You can sort the documents/mail pieces displayed by either:

Recipient Reference	Alphanumerically, either in ascending or descending order.
Data/Time	Chronologically, either in first to last or last to first.

To do this, follow the procedure below:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.

2. Click the required column heading, Recipient Reference or Data/Time.
   An arrow beside the column indicates the order.

3. Click the same column heading again to reverse the sort order.

Finding the jobs you wish to see

The job filter has two areas which allow you to find only the jobs you wish to see, both are described in greater detail in this section.

Job reports are created for all jobs that have passed through the Relay Communications Hub, that is, with a status of Completed.

Searching for jobs

To search for a job, follow these steps:

1. From within the **Job Reports** page, click in the **Search for a job** box, shown below:

2. Type in the letters for which you wish to search. To find "Blood Test Results", you need type only part of the text you wish to find, for example, "blood" or "test" or "results".

3. To begin the search, either:

    - Click 🔍, or
    - Press **Enter**.

To return to the previous list of jobs, delete the characters in the **Search for a job** box. By default, the Job Summary is shown for the first job in the left-hand panel.

Filtering jobs by date

You can filter the jobs by a predefined period or by a date range you define yourself. To filter the job list, follow these steps:

1. From within the **Job Reports** page, at the top, click in the date range, by default the date range shown is the last seven days.

2.   Click on the required date range to show the jobs processed during that period, or

3.   Click **Custom Range** to open the following:

4.   Either:

   • Click in the date boxes and enter the dates required manually, or
   • In the calendar click the start date and then the end date. Use the arrows to find the required months.

5.   If you have chosen a **Custom Range** click **Apply** to affect the selection.

The filtered jobs are displayed in the left-hand panel. By default, the **Job Summary** is shown for the first job in the right-hand panel.

Exporting a report

Once you have specified the required date range for the print streams displayed, you can export the information shown as a `CSV` file. This report gives details of all print streams sent within that time and is particularly useful if you wish to report on print streams submitted over long periods. To do this, follow the procedure, below:

1.   Click ↻ to ensure you have the most up to date information.

2.   Select the required job in the left-hand panel.

3.   Click [↗ Export]

4.   In the **Save as** dialog, navigate to the required location, give the file a meaningful name and click **Save**.

The file is then downloaded to the specified location and is available to used as required.

Report Field Descriptions

The report fields are as follows:

Job ID	Unique ID for the job.
Job Name	The name of the job.
Mail Piece ID	Unique ID for this mail piece.
Print Stream ID	Unique ID for the printstream.
Input file name	A unique file name designated by the system.
Bundle Name	The unique name of the bundle. This is a list of the criteria used to create the bundle, for example, "RELAY RETURN, Relay Reporting, A4, Duplex, Black and White, [No Inserts]".
User Name	The username of the submitting user.
Department Name	The name of the department to which the user belongs.
Job Submitters Email	The submitting user's email.
Date Submitted	The date on which the job was submitted.
Print Channel Status	The latest status of printed mail pieces, for example, Delivered, Sent.
Print Channel Status Date	The date on which the **Print Channel Status** was last updated.
Print Send Date	The date on which the mail pieces in the job were sent.
Print Job Option Send Date	The send date selected in the Printer Driver's Job Options by the submitting user.
Simplex & Duplex	Whether the job is simplex (one-sided) or duplex (double-sided).
Paper Size	The size of the paper on which the mail pieces are printed for a physical print job.

Sheet 1 Stock	The sheet stock or paper used for the first page of the mail piece. This may be a form or headed paper.
Sheet 2 Onward Stock	The sheet stock or paper used for the remaining pages in the mail piece, usually plain paper.
Job Reference	The reference number of the job. This is defined at submission.
Simplex Pages / Duplex Sides	The number of pages. For simplex, one page comprises a printed side and a blank side. For duplex the number of sides is the number of sides on which printing appears.
Deleted By	The username of the deleting user.
Deleted On	The date on which the job was deleted.
Deleted By (Email)	The email address of the deleting user.
Template/Communication Type	The template or communication type selected on submission.
Attachment Name	The name(s) of any attachments.
Destination Address	The postal address of the recipient.
Color or Black & White	Whether the mail pieces are printed in black and white or color.
Mailing Service	The mailing service by which the mail piece is sent. For example, first class, second class.
Envelope	The size of the envelope in which the mail piece is sent.
Region Group	The postal region in which the recipient resides.
Email Channel Status	The latest status of printed mail pieces, for example, Delivered, Sent.
Email Channel Status Date	The date on which the **Email Channel Status** was last updated.
Email Send Date	The date on which the email was sent.
Email Job Option Send Date	The send date selected by the submitting user in the Printer Driver's Job Options.
From	The email address that you wish the recipient to see, for example, an administration email address, this could be admin@ycompanyname.com

Sender	The email address of the sender.
Reply To	The address to which replies to sent emails are returned.
Email To	The recipient's email address.
Email CC To	Email addresses to which copies of the email are sent. This may be an archive or supervisor.
Subject	The subject line of the email.
Body	The body text of the email.
Digital App Name	The name of the digital app to which mail pieces are sent.
Recipient Reference	The unique Id of the customer to which this mail piece has been sent, for example, an account number.
Digital Channel Status	The latest status of mail pieces sent through a digital app, for example, Delivered, Sent, Failed, completed.
Digital Channel Status Date	The date on which the **Digital Channel Status** was last updated.
Digital Channel Send Date	The date on which mail pieces were sent to the digital app.

Downloading output files

> **Note:** This function is only available if you are a **NOT** using a centralized print room to process your jobs.

Once you have uploaded your job and it has completed processing, you may download it to see how the Template has been applied.

Downloading in both the job list and the **Job Summary** are disabled until the job is complete.

If there are no downloadable files for the job, both download buttons are disabled

To do this, follow the procedure, below:

1. Click ⟳ in the upper right corner of the screen to ensure you have the most up to date information.

2. Select the required job in the left-hand panel.

3. Click ⬇ Download Output Files in the **Job Summary**.

4. Click 📊 in the left-hand panel to go to the **Job Reports** screen, a green check mark indicates the job is complete.
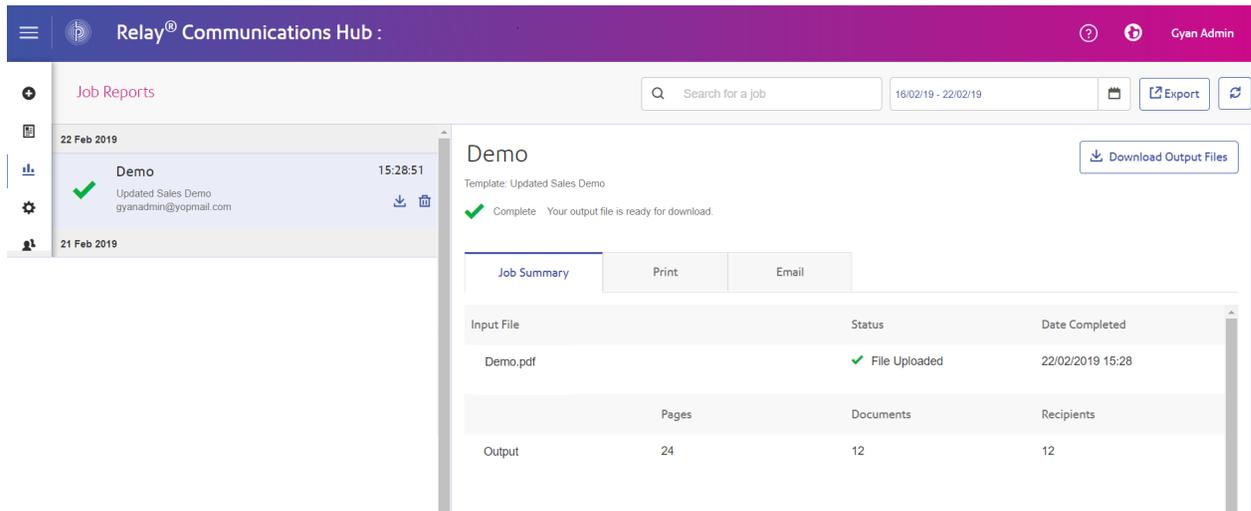
5. Select the file you want to download from the list.

6. Click the **Download Output Files** button in the upper right of the screen to download the document, which now have the 2D barcode applied and will be ready for insertion using your Relay Inserter.

7. Alternatively, you can also click ⬇ in the left-hand panel to download your document.

8. In the **Save as** dialog, navigate to the required location, give the file a meaningful name and click **Save**.

The file is then downloaded to the specified location and is available to used as required.

Email Deliverability report

If you used one of the templates that provides an emailing function to process your job, the **Email Deliverability** report is shown in the Job Summary below. An example is shown, next:
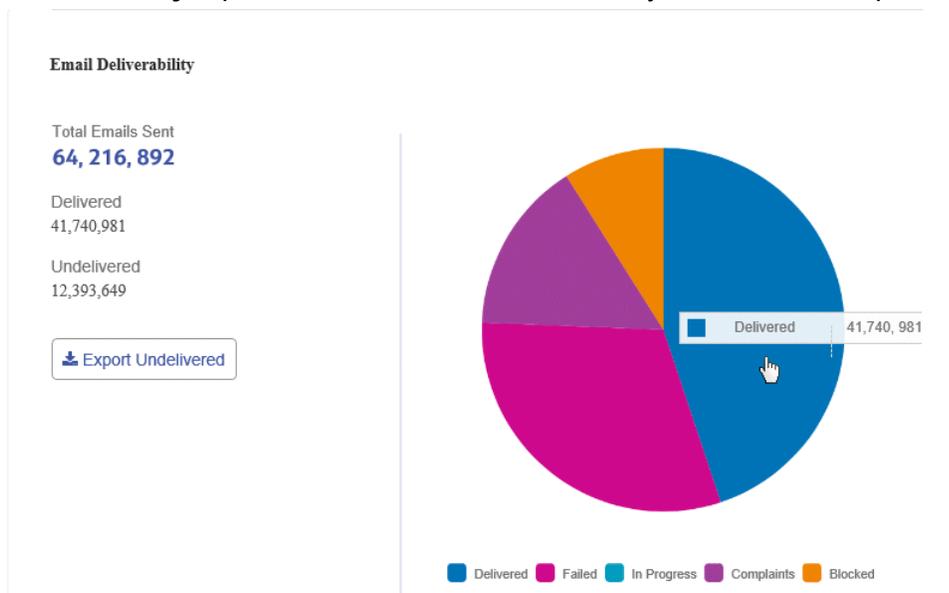
This report gives the **Total Emails Sent**, **Delivered** and **Undelivered**.

The pie chart breaks down the status of the emails, which are as follows:

Delivered	The email has been delivered to the recipient.
In progress	The email is still processing. This is updated as the status of the emails change.
Blocked	The email is not delivered because the email address in not a valid or does not exist.
Failed	The email is not delivered because the recipient has actively blocked emails from your sender address.
Complaints	The email is not delivered because the recipient has actively blocked emails from your sender address and has made a complaint to the service provider.

Downloading the Email Deliverability report

To do this, follow the procedure, below:

1. Click ⟳ to ensure you have the most up to date information.
2. Select the required job in the left-hand panel.
3. Click **Export Undelivered**.
4. In the **Save as** dialog, navigate to the required location, give the file a meaningful name and click **Save**.

The file is then downloaded to the specified location and is available to used as required.

Viewing a breakdown of Export Undelivered

If the Template used in your Job generated emails, you can view a breakdown of the Export Undelivered and delivery failures by clicking its job name in the left-hand panel. When the **Job Summary** page opens in the right-hand panel, click the **Email** tab to display the following:

The job name is given at the top of the page with the name of the template used. A ✔ indicates that the job processed successfully.

The **Email** tab gives the total number of emails sent, this is the number of emails generated during job creation. The body of the table gives the email address of the intended recipient, the name of the **Input File**, the **Date/Time** that the email was generated and the status of the emails. This information is the same as given in **Email Deliverability report** on page 168.

To filter the emails displayed by status, click [▼ All ˅] and select the status you wish to see from the menu.

Search for an email address

To search for an email address, follow these steps:

1. From within the **Email** tab, in the left-hand panel, click in the **Search by email address** box, shown below:

2. Type in the email address for which you wish to search.

3. To begin the search, either:

 • Click 🔍, or
 • Press **Enter**.

To return to the previous list of email addresses, delete the characters in the **Search for an email address** box.

Deleting a Job

You can delete jobs from the **Job Reports** page either from the scrollable job list in the left-hand panel or from the Job Summary. Both are described below.

Only jobs with the following statuses can be deleted. For ease of use, only jobs displaying a 🗑 icon or a **Delete** button may be deleted.

🖨	Printed
✉	Mailed. This job has been mailed but can be removed from the system.
❗	Job error.
🖨	Job printing.

> **Note:** Exported job reports include a time stamp and the user/operator who deleted the job.

Deleting a Job from the Job Report List

To delete a job from the scrollable job list on the left-hand side of the **Job Reports** page follow the procedure below:

1. Select the required job from the list.

 The Job list is as follows. A 🗑 on the same line as the job name, the job may be deleted.

2. Click 🗑.
3. A message is displayed requiring that you confirm deletion. Click **OK**.

The job is marked with ✕, as shown below, and is no longer available for use.

Deleting a Job from Its Job Summary

To delete a job from its Job Summary in the **Job Reports** page follow the procedure below:

1. Select the required job from the Job list.

    The Job Summary is shown below:

2. In the Job Summary click **Delete Job**.

3. A message is displayed requiring that you confirm deletion. Click **OK**.

The job is marked with ✕, as shown below, and in the Job list. It is no longer available for use.

> **Note:** Jobs with an error status do not have a Job Summary and so cannot be deleted in this way. Use **Deleting a Job from the Job Report List** on page 171 instead.

Using TrackMyMail

This product can be used with Pitney Bowes's TrackMyMail. Our Technical Support team can configure both products. For information on how to use TrackMyMail, refer to the user documentation provided with the product.

19 - Glossary

This section gives descriptions of the terms found in this guide.

In this section

Glossary

Administrator	The person responsible for the administration of Relay Communications Hub. These responsibilities include creating users, defining the organization hierarchy and specifying bundle criteria.
Attachments	A PDF file uploaded into Relay Communications Hub and selected in the Printer Driver. This is attached to each mail piece in the job at the time of printing, mailing or archiving.
Bundle	A bundle is a group of attributes which define a print stream, for example, color, page size. The name of the bundle is automatically generated when the bundle is created and is made up of the attributes selected. For example:
	C5, Duplex, Black & White, A4, 2nd Class, No Insert
	This bundle has grouped together all jobs which are to be printed double-sided (duplex), on A4 paper and to be posted in a C5 envelope as 2nd class without the inclusion of pre-printed inserts.
Communication Channels	Defines how Relay Communications Hub outputs the job. This can be one, all or any combination of Archive, Email and Print.
Communication Types	A group of settings which define how the mail pieces in your job are processed. The first setting is Communication Channel, these are printing, emailing and archiving, these can be sub divided into other groups, for example, whether the job is printed in color and black and white.
Concatenation	The grouping of individual jobs into one print stream. Jobs are concatenated by bundle, a number of common attributes.
Download	The print stream is transferred from Relay Communications Hub on to the printer.
Job	This is submitted by a user and consists of a number of mail pieces/letters. Letters may have been mail merged within Microsoft Word and submitted to Relay Communications Hub through the Printer Driver.
Mailing Envelopes	Envelopes in which printed mail pieces are inserted for mailing. These are usually defined by physical size.
Mailing Services	The service used to send printed mail pieces.
Mail Piece	A single letter, with or without attachments, sent in one envelope to a single recipient. Mail pieces are concatenated or mail merged into Jobs/Documents and then submitted to Relay Communications Hub by users.
Operator	The person creating triggers to automate printing of print streams in addition to manually triggering printing.

Pages   The total number of pages in the job. This refers to the number of printed sides, for example, seven pages printed simplex is seven physical sheets of paper. Seven pages printed as duplex is 4 physical sheets, front and back sides.

Pre-Printed Inserts   A physical published document inserted into the envelope withe the mail piece at the time of printing.

Print Stream   A concatenation of individual jobs into 1 larger file for printing.

Release   The process of starting the download of the print stream from Relay Communications Hub on to the printer.

Role   A group of settings which define user permissions and access to parts of the user interface and facilities.

Search Criteria   The criteria for which and item on a page is found. This item, which could be an account or invoice number can then be used to identify the first page in a mail piece and then be used to identify the first pages in all mail pieces. In addition, it can be used to identify mail pieces to specific recipient.

Sheet Stock   In the case of Physical stock, this is the paper on which mail pieces are printed. Otherwise, this is a PDF of headed paper or a form which is overlayed onto the mail pieces.

Side Assignment   The side or sides on which the Sheet Shock appears.

Trigger   The means by which print streams are sent to print. Triggers can be set to run at specified times on when the number of pages or mail pieces exceeds that specified.

User   The person submitting individual jobs to Relay Communications Hub for printing.

20 - CSV File Formats

The Bulk User Upload facility is available in a number of Relay Communications Hub tools which allow you to upload multiple entries from a single Comma Separated Variable (CSV) file. The csv files do not require header rows.

In this section

CSV File

Where the information required is more than a single field, give the data as follows:

- Each user appears on a separate row
- Each field is given in the order in which it appears when manually adding departments and users, this is given below
- Each field is separated with a comma, or, if using a spreadsheet, appears in a separate column

The following fields appear across the top of the csv file or as the column headings in a spreadsheet, they must appear in the order given.

- First Name
- Last Name
- Email Address
- Department Name
- Role

> **Note:**
>
> All fields are mandatory.

Click **Download Sample**, to download the following Excel file:
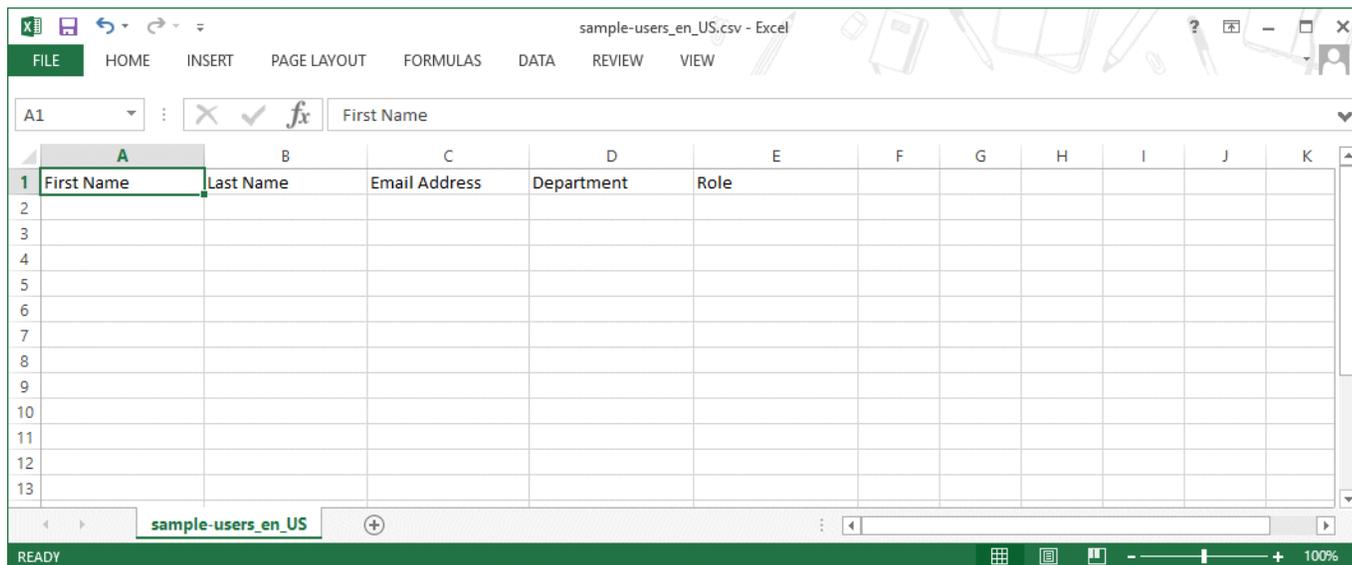
21 - Activity Logging

The Relay Communications Hub creates activity logs; these record standard activity as well as errors. The logs are helpful in determining and solving system failures quickly and effectively.

The default location of the log files is *<Drive>:\OFMA\Logs*. A configuration file option allows you to specify your preferred location.

In this section

Preventing logs using too much space

To prevent logs using too much disk space you may control the size limit of the file before a log is rolled on to the next file in a configuration option. Rolled logs have a suffix of _0, _1, _2 or _3. Once the file with the suffix _3 has reached its limit, the next file created returns to _0 and the process cycles round. In addition, a configuration option specifies the number of historical logs to be maintained.

Each time a new log is created, the version information of the service creating the log is the first entry in that log.

Each module logs standard activity as well as errors in a single system log. The detail provided is set by a configuration option which allows more detailed information to be gathered when actively investigating a problem.

The messages from each module have a similar layout, although the message content is different. The form:

OFMA_<Version_Number>_<Component_Name>_<MachineName>.txt

Example log file

An example log file is shown below:

```
        2012-08-23 20:40:36.0676 4 ERROR PIRelay Communications
HubBundlerNA.MiniTickets
     Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\cd39eb4d-2ef5-4aa3-a7d5-77421d0a762b.PDF' because it
is being used by another process.
        at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
```

```
        EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\cd39eb4d-2ef5-4aa3-a7d5-77421d0a762b.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
 maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
    2012-08-23 20:59:34.3049 11 ERROR PIRelay Communications
HubBundlerNA.MiniTickets
    Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\5cde3530-1c73-4193-9d3e-f39169027366.PDF' because it
is being used by another process.
        at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
        EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\5cde3530-1c73-4193-9d3e-f39169027366.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
 maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
    2012-08-23 22:05:05.1117 4 ERROR PIRelay Communications
HubBundlerNA.MiniTickets
    Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\7d1a9be7-b74f-492f-9eaf-46b0a7b88cbc.PDF' because it
```

```
is being used by another process.
        at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
         EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\7d1a9be7-b74f-492f-9eaf-46b0a7b88cbc.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
 maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.MiniTickets.processMiniTickets()
```

22 - Predefined Roles

Roles are used in Access Pools and specify which parts of Relay Communications Hub that the users in the pool are allowed to use.

In this section

Roles defined in Relay Communications Hub

The roles and a description of their function is given below:

PI-OFMA-ACCESS	Allows website and Relay Communications Hub Printer Driver users access to the Relay Communications Hub system. This is the minimum access allowed.
PI-OFMA-ADHOC-ATTACHMENT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access temporary ad-hoc attachments.
PI-OFMA-ADMIN-CONFIGURE	Allows access to the Configuration section of the Relay Communications Hub User website's Administration tab for one specific company.
PI-OFMA-ADMIN-OWNER	Allows access to the Organization section of the Relay Communications Hub User website's Administration tab for one specific company.
PI-OFMA-ADMIN-SYSTEM	Allows access to the Reports section of the Relay Communications Hub User website's Administration tab for one specific company.
PI-OFMA-AUTH-REQUIRED-01 to 09	Defines different levels at which a User's Job will require authorization. This is dependent on the options selected in the printer driver where the requirement for an authorization level has been specified. The levels are in the range 1 to 9 where 1 is the lowest and 9 the highest.
PI-OFMA-AUTHORIZER-01 to 09	Defines different levels at which to allow a User to be an authorizer of jobs requiring authorization. The levels are in the range 1 to 9 where 1 is the lowest and 9 the highest.

PI-OFMA-AUTOSUB-AUTHOR-PROXY	Auto-Submission extracts meta data (the Autosub Author) from the PDF, adds it to the job ticket and submit jobs to the Relay Communications Hub Server as the Hot Folder user. The Relay Communications Hub server checks whether the Hot Folder user has the new role and then submits the job with the Autosub Author as the User instead if: • the Autosub Author in the ticket is an email address • the Autosub Author email address exists as a user in the system • the Autosub Author belongs to the same company as the User invoking the Upload • If any of these conditions are not met then we will submit the job as normal as the Hot Folder user (that is, with the User invoking the Upload).
PI-OFMA-DEFAULT	Provides basic rights to Relay Communications Hub Printer Driver users. The default is company specific and can be updated in the Management area of the **Roles** page.
PI-OFMA-DRIVER-PREVIEW-EDIT	Allows a user to edit information in the Relay Communications Hub Printer Driver's Preview Panel.
PI-OFMA-ELECTRONIC-ATTACHMENT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access Electronic Attachments as configured in that page of the Relay Communications Hub website for one specific company.
PI-OFMA-EXTERNAL-PDF-ATTACHMENT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access upload external PDF attachments.
PI-OFMA-OWNER-SUPERVISOR	Allows access to the Pre-Pay pages of the Relay Communications Hub website for one specific company.
PI-OFMA-PRE-PRINTED-INSERT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access Pre-Printed Inserts as configured in that page of the Relay Communications Hub website for one specific company.
PI-OFMA-QA-REVIEWER	Allows access to the QA tab of the Relay Communications Hub User website's for one specific company. This role allows the holder to review submitted jobs to ensure that they meet the company's quality standards.

23 - System Requirements

The Printer Driver Service requires the following minimum system configuration.

In this section

Hardware

The minimum hardware requirements are shown below:

- Intel Pentium 4 CPU 2.4 GHz
- 1 GB RAM
- Monitor minimum resolution of 1024x768, 32-bit color

Software

The following platforms are supported for the Printer Driver:

Operating system

- Microsoft Windows 7
- Microsoft Windows 8

> **Note:** The driver is 32-bit software, however it can be installed on 64-bit hardware running 32 bit software, or on 64-bit hardware running 64-bit software.

> **Note:** All of the above operating systems should have had the latest Windows updates run against them.

Installed software requirements

In addition, the following must be installed.

- .NET 4.5.2
- Microsoft Office - supported versions are 97, 2003, 2007 and 2010.

> **Note:**

> If .NET 4.5.2 is not available on the PC, it will be installed during driver installation.

Running Internet Explorer as an Administrator

When installing on Windows 7, Internet Explorer has to be run as an administrator

1. To achieve this, right-click the **Internet Explorer** icon .
2. From the resultant menu, select **Run as administrator**.

Internet Explorer is opened on Administrator mode.

Rights and Privileges

You must start up your PC using a sign in that has Local Administrator rights.

> **Note:**
>
> • Parts of the installation procedure will fail if you do not have these privileges.
> • You may encounter an error "Installation error - Ikernal.exe not found" or "Setup failed to launch installation engine: Access is denied". This is caused by your having insufficient rights on the machine on which you are attempting to install.

1. At a command prompt, type: `dcomcnfg.exe`.
2. In the **Distributed COM Configuration Properties** dialog open the **Default Security** tab.
3. In **Default Access Permissions** click **Edit**.
4. Ensure **Allow Access** is shown beside your name.
5. If **Allow Access** does not appear next to your name, either modify an existing profile or create a new profile that has the necessary permissions.
6. Apply all the changes and attempt to run `Setup` again.

This information comes from the Microsoft Knowledge Base website at: **http://support.microsoft.com**

> **Note:** The root directory of the install drive must be writable by the installer.

Recommended Browsers

The following browsers are recommended for use with Relay Communications Hub:

• Mozilla Firefox
• Google Chrome

In addition, Relay Communications Hub is supported on Microsoft Internet Explorer 11 - with disabling of TLS 1.1 and above.

24 - More Information

In this section

Copyright

Pitney Bowes is making this document available to you, free of charge, for use with the software, in order to make your experience more convenient. Every effort has been made to ensure the accuracy and usefulness of this document reflecting our experience. Product information may change after publication without notice.

This document is being distributed on an "as is" basis and we make no representations or warranties, express or implied, with respect to its accuracy, reliability or completeness and the entire risk of its use shall be assumed by you. In no event shall we be liable to you or any other person, regardless of the cause, for the effectiveness or accuracy of this document or for any special, indirect, incidental or consequential damages arising from or occasioned by your use, even if advised of the possibility of such damages.

All software described in this document is either our software and/or our licensed property. No license either expressed or implied is granted for the use of the software by providing this document and/or content.

Under copyright law, neither this document nor the software may be copied, photocopied, reproduced, transmitted, or reduced to any electronic medium or machine-readable form, in whole or in part, without our prior written consent.

We will continue to maintain this document and we welcome any clarifications or additional information regarding its content. Address comments concerning the content of this publication to:

```
3001 Summer Street

Stamford, Connecticut 06926

www.pitneybowes.com
```

We may use or distribute the information supplied in any way we deem appropriate without incurring any obligation to the submitter of the information. © 2022. Pitney Bowes Inc. All Rights Reserved.

Trademarks

Relay Communication Hub is the property of Pitney Bowes Inc. or one of its subsidiaries or divisions. All other trademarks are the property of their respective owners.

pitney bowes

3001 Summer Street
Stamford CT 06926-0700
USA

www.pitneybowes.com