pitney bowes

Shipping and Mailing
Inserting

Relay™ 7000/8000 with File Based Processing Software

Admin Guide

US English Edition
SV63132 RevB
August 1, 2015

©2015 Pitney Bowes Inc.

All rights reserved. This book may not be reproduced in whole or in part in any fashion or stored in a retrieval system of any type or transmitted by any means, electronically or mechanically, without the express written permission of Pitney Bowes.

The use of this information by the recipient or others for purposes other than the training of customers on Pitney Bowes equipment may constitute an infringement of intellectual property rights of Pitney Bowes, and Pitney Bowes assumes no responsibility for any such use of the information.

We have made every reasonable effort to ensure the accuracy and usefulness of this manual. However, we cannot assume responsibility for errors or omissions or liability for the misuse or misapplication of our products.

Except as provided in writing, duly signed by an officer of Pitney Bowes, no license either express or implied, under any Pitney Bowes or third party's patent, copyright or other intellectual property rights is granted by providing this information.

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

Version History

SV663132 RevB	August 1, 2015	Initial release

Related Documentation

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

Table of Contents

1 - Product Overview

Relay 7000/8000 Inserter with File Based Processing 2
How it Works 3
System Workflow Diagram 4
File Based Processing Terms 5

2 - User Lists and Permissions

User Permissions 8
Add and Edit Users 9
Change User Password 11

3 - File Based Software Tools

Create a Select File for Reprints 14
Journal View 16
Archive a Job 17

4 - Direct Reports

Direct Reports 20
Modify Direct Reports Data Path 21

5 - Additional Features

Stand Alone Mode 26
Account Pull Tool 27

6 - Hand Scanner Setup

Set the Hand Scanner Volume 32
Set the Hand Scanner Carriage Return 33

1 - Product Overview

In this section

Relay 7000/8000 Inserter with File Based Processing 2
How it Works 3
System Workflow Diagram 4
File Based Processing Terms 5

Relay 7000/8000 Inserter with File Based Processing

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

The Relay 7000/8000 Inserter with file based processing software is a solution that processes mail with a high degree of mail run and mailpiece integrity. The file based software works with the inserter to ensure that every mailpiece is completed with the correct contents.

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

The solution uses bar coded documents that enable a dedicated computer to keep track of the piece during the process and tell the inserter how to build each mailpiece to the specified completion. This is known as file based processing, which provides mail piece integrity to the mail operation. This solution uses Planet Press, a software suite with powerful document creation and work flow management capabilities, to produce the documents that are processed by the inserter and file based software.

Reporting Feature

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

Additional Features

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

The Relay 7000/8000 with file based processing supports many additional features provided by the tabletop inserter, such as edge marking for auditing or postal sortation; select feeds, which allow additional pages or inserts to be included based on conditional data; and envelope select, which allows an alternate envelope to be used.

How it Works

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

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

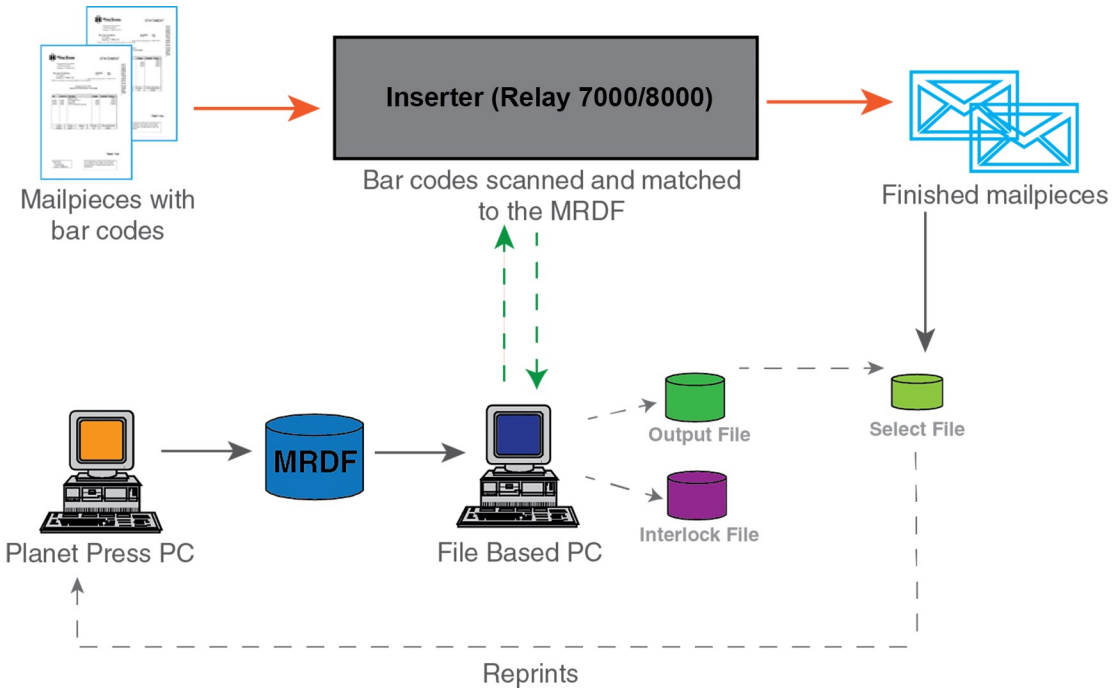
- **Interlock file**- contains one record for each mailpiece and is used to record status (good, bad or unknown).
- **Output file** - contains one record for each mailpiece and is used to record everything that happens to that mailpiece while it is on the inserter

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

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

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

System Workflow Diagram



Relay 7000/8000 with File Based Processing Software - Flow Diagram

File Based Processing Terms

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

Common File Based Terms

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

This page intentionally left blank.

2 - User Lists and Permissions

In this section

User Permissions 8
Add and Edit Users 9
Change User Password 11

User Permissions

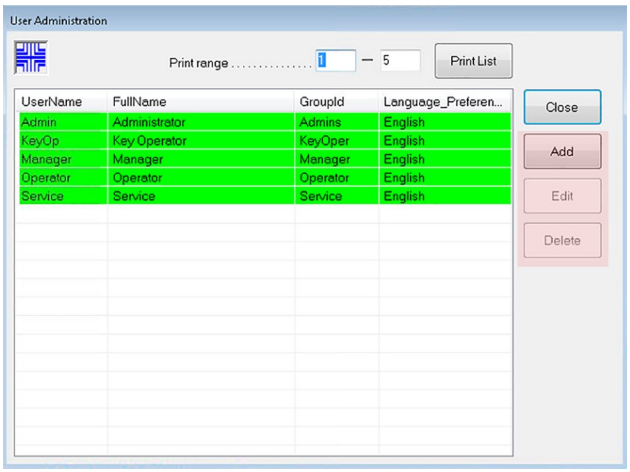
Each system has a list of users with associated user accounts and permissions. This enables you to manage users and provide security on which user account types can perform certain system tasks.

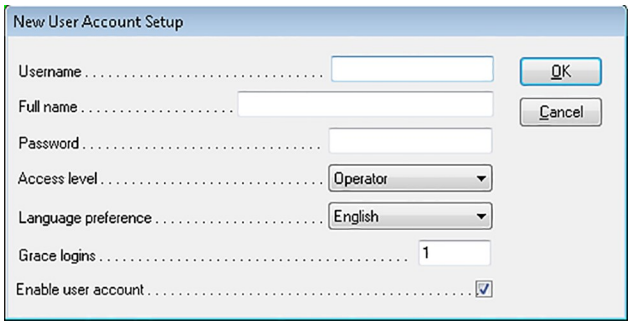
The file based processing software comes with five preloaded user accounts with specific passwords and permissions.

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

Add and Edit Users

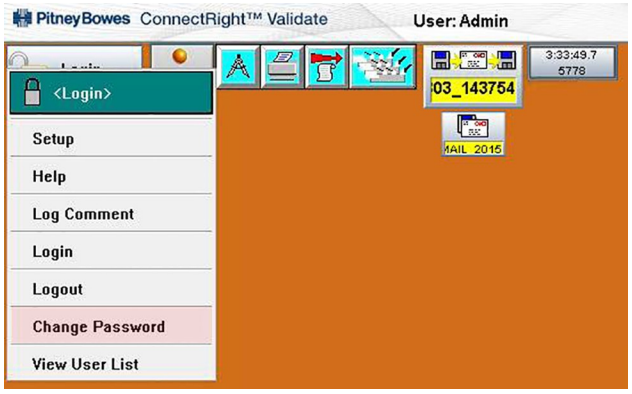
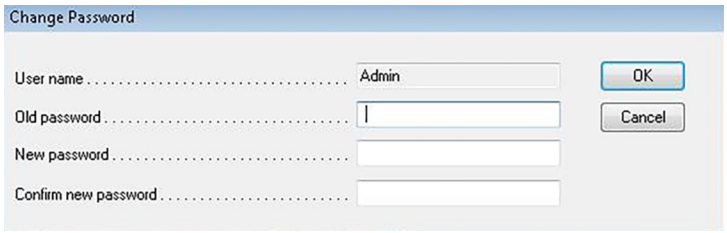
The user list can be modified to add or delete users, change access levels and passwords.Perform these steps to edit the user list.

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

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

Change User Password

Perform these steps to change the user password.

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

This page intentionally left blank.

3 - File Based Software Tools

In this section

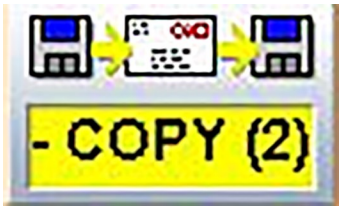
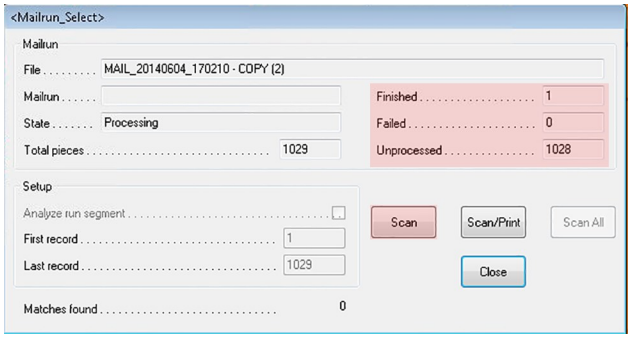
Create a Select File for Reprints	14
Journal View	16
Archive a Job	17

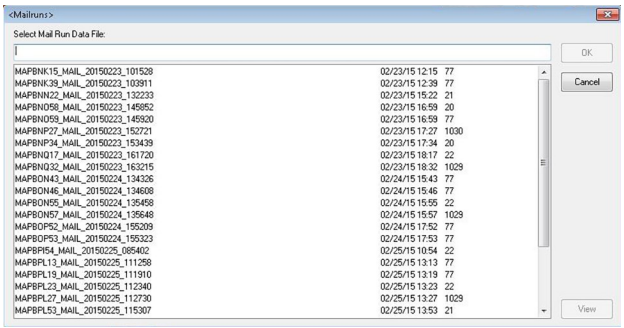
Create a Select File for Reprints

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

Note:

The Select directory is monitored by Planet Press. When a file is created Planet Press reviews the file and recreates the pieces that are missing and need to be reprinted.

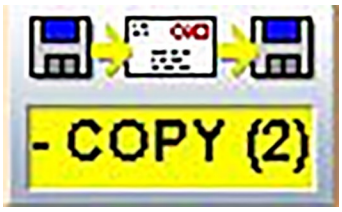
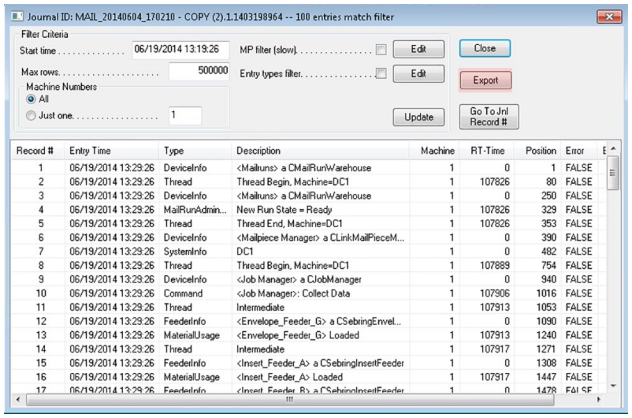
#	Step	Action
1	Select the **Mailpiece Manager** icon on the main screen and select **Tools>Create Select File** from the drop-down menu.	
2	When the dialog opens you will be able to view the total **Finished**, **Failed**, and **Unprocessed** mailpieces. Select **Scan** . This creates a Select file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

#	Step	Action
4	Once the failed and unprocessed pieces are reprinted, select **Job Manager** from the main screen.	
5	When the dialog opens elect the **MRDF** for the job you were running previously and select **OK**. *The job is reloaded. Once it is manually repaired it is removed from the Select file.*	

Journal View

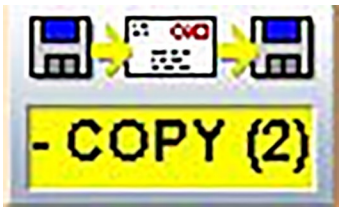
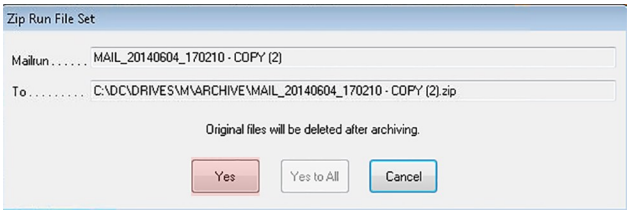
Service or administrators may need to review or send a journal of system activity to an engineer for troubleshooting. The journal is a list of selections users have made within a certain time period. This log supports troubleshooting activity by enabling reviewers to understand what users were trying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

To use the **Journal View** option perform the following steps.

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

Archive a Job

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

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

Note:

Once archived, the original files will be deleted.

Automatic Backup and Archive of the Output File

Every 14 days the file based processing software automatically creates a backup of the **Output file** for customer records. The backup of the Output file is stored as .txt file.

Archiving Output Files - Proof of Compliance

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

4 - Direct Reports

In this section

Direct Reports 20
Modify Direct Reports Data Path 21

Direct Reports

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

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

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

Note:

Direct Reports does not support custom reports.

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

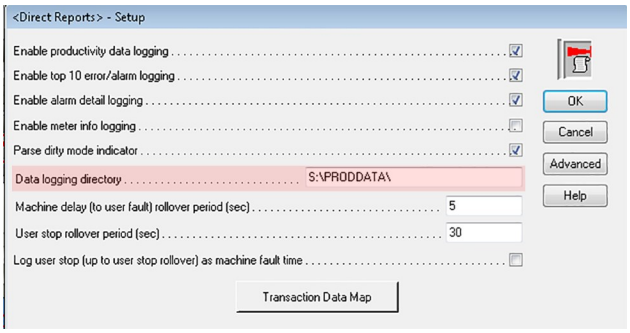
Direct Reports is configured with the correct data paths and they should not need to be changed. If for some reason the paths are incorrect or need to be modified, refer to the topic *Modify Data Paths in Direct Reports*.

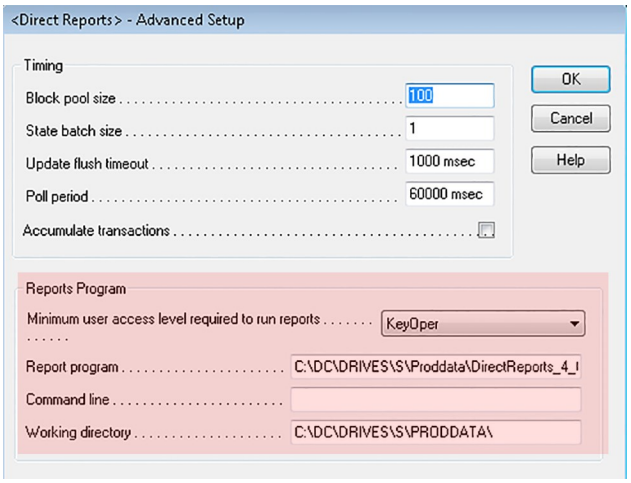
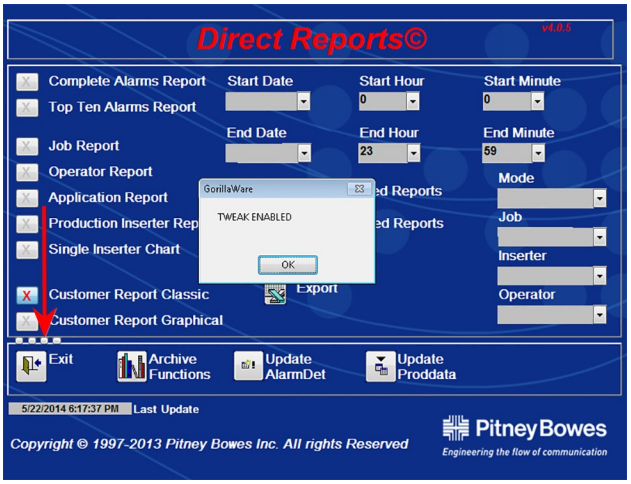
In addition to English, Direct Reports can be configured to display in all languages supported by the file based software.

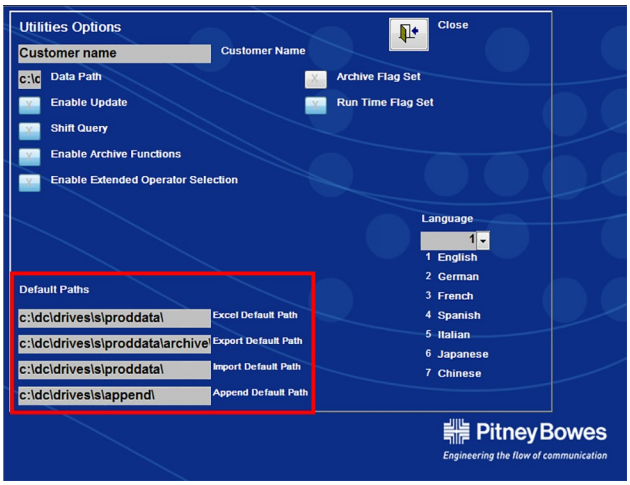
Modify Direct Reports Data Path

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

Perform these steps if you need to modify the Direct Reports data path.

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

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

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

This page intentionally left blank.

5 - Additional Features

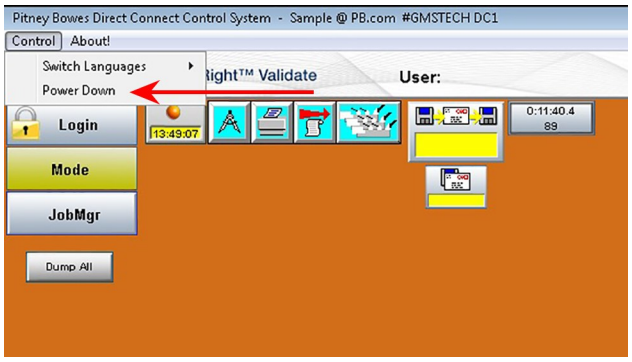
In this section

Stand Alone Mode 26
Account Pull Tool 27

Stand Alone Mode

Stand alone mode is running the inserter without the file based processing software.

Perform these steps to run the inserter in stand alone mode.

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

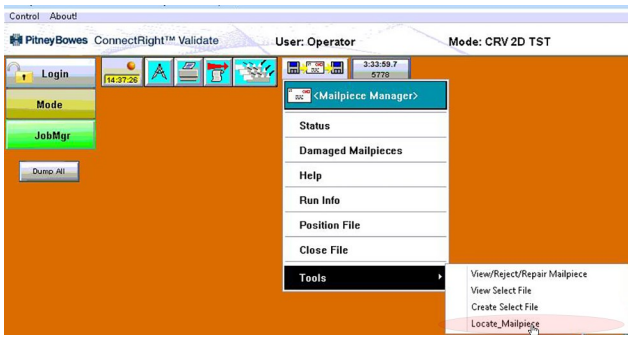
Account Pull Tool

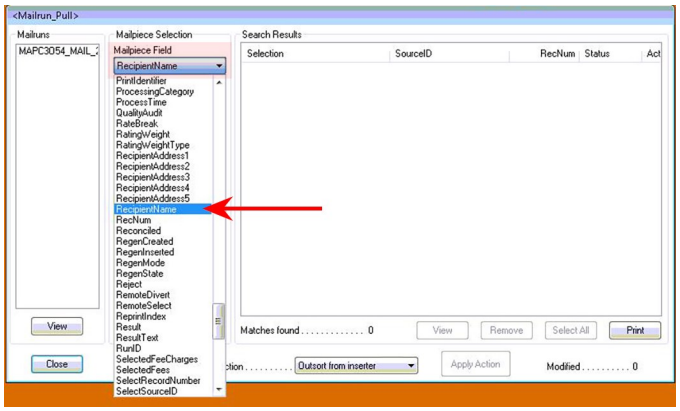
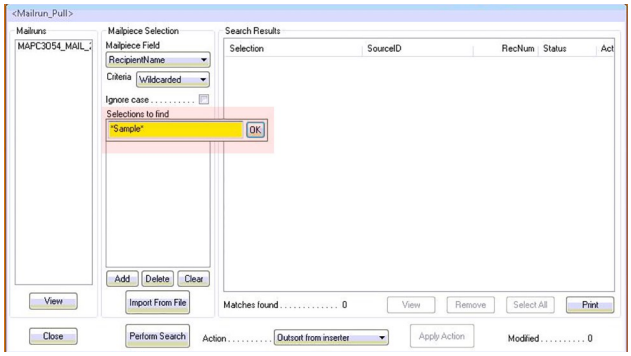
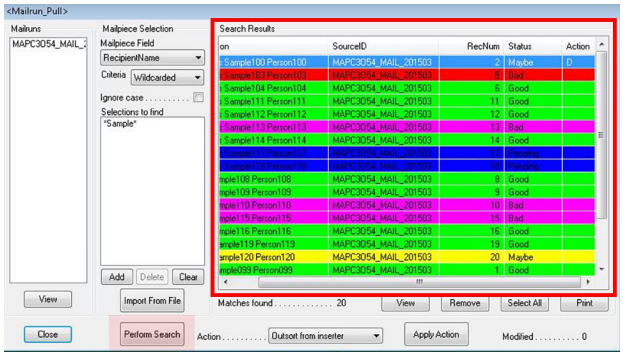
The Account Pull tool lets you divert a group of mailpieces from a job based on a particular set of criteria. Access level to this is configurable, although it is usually used by Admin and higher.

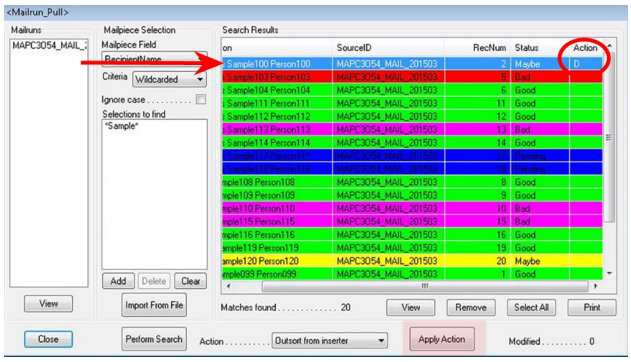
Note:

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

To use this tool perform these steps.

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

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

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

This page intentionally left blank.

6 - Hand Scanner Setup

In this section

Set the Hand Scanner Volume 32
Set the Hand Scanner Carriage Return 33

Set the Hand Scanner Volume

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

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

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

Set the Hand Scanner Carriage Return

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

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

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

This page intentionally left blank.

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

SV63132 RevB
©2015 Pitney Bowes Inc.
All Rights Reserved