

Relay Communication Hub

Version 2.0

Configuration Quick Start Guide



Table of Contents

1 - Configuring Relay Communications Hub

Signing in to My Documents	4
Sorting tables	5
Filtering and searching tables	6
Error Messages	6

2 - Managing Attachments

Adding an Attachment	8
Editing Attachments	10
Deleting Attachments	10

3 - Managing Sheet Stock

Adding Sheet Stock	12
Editing Stock	15
Deleting Stock	15

4 - Managing Communication Types

Setting search criteria	17
Measuring the position of the search criteria	18
Enforcing options	19
Copying Communication Types	20
Editing Communication Types	21
Adding Communication Types	23
Testing Communications Type	31
Deleting Communication Types	32

5 - Glossary

Terms and Definitions	35
-----------------------	----

6 - Information

More Information	37
Contact	37
Copyright	38
Trademarks	38

1 - Configuring Relay Communications Hub

The **Configuration** tab provides a platform on which you can define Communication, settings Common to all modules of Relay Communication Hub and the Print options seen by the end user.

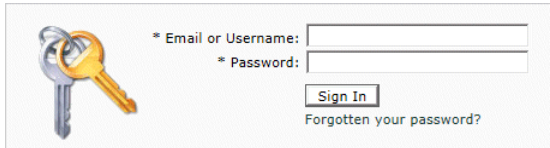
In this section

Signing in to My Documents	4
Sorting tables	5
Filtering and searching tables	6
Error Messages	6

Signing in to My Documents

Sign in to **My Documents** as follows:

1. In **My Documents**, the **Sign in** page is displayed.



The image shows a sign-in form with a key icon on the left. It contains two input fields: '* Email or Username:' and '* Password:'. Below the password field is a 'Sign In' button and a link that says 'Forgotten your password?'.


2. Type in your **Username** and **Password**.
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 login.

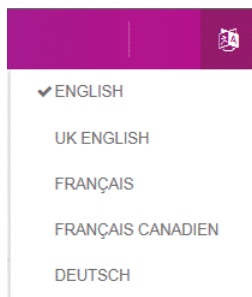
Note: After five incorrect login attempts you are locked out of the website for ten minutes. After this time, use the **Forgotten your password** facility to reset your login credentials.

4. Click **Sign in**.

The **My Documents** page is then displayed. This is described in the next section.

Changing the display language

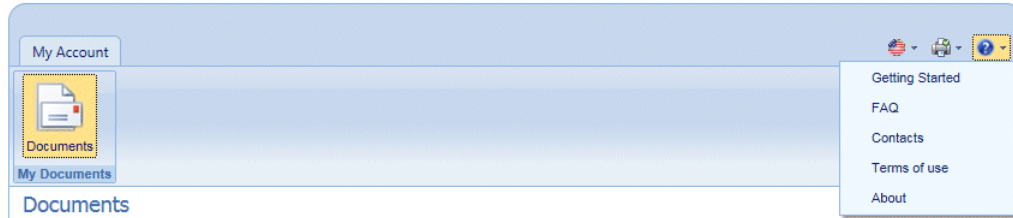
Relay Communications Hub automatically detects the language in which it should be displayed from your system. If you wish to change this, click  in the top right of your screen, the menu is shown below:



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.

Help and information

Clicking the help icon in the top right of your screen, shown below, opens a menu offering five items.

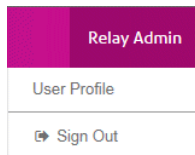


Selecting one of the items opens it in the same page.

Getting Started	Give details on how to get started with My Documents . The information given is covered in this document.
FAQ	Opens a list of frequently ask questions to help you in using My Documents .
Contacts	Who to contact if you have any questions or are experiencing any problems with My Documents .
Terms of use	The terms and conditions of using this software.
About	My Documents copyright and version information

Signing Out

To sign out, click the user name in the top right corner to open the menu.



Select **Sign Out**. You are then returned to the **Sign In** page.

Sorting tables

The tables displayed on each page are unique; however, clicking the column heading sorts the information in table alpha-numerically. The sort order is indicated by an arrow next to the column label.

Delete									
Authorized	Job Name	Job Reference	Date Submitted	Completed Date	Pages	Job Status	Communication Type		
N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:16 PM	11/9/2015 2:42:45 PM	1	Completed	Emailfrompage		
N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:26 PM	1	Completed	Emailfrompage		
N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage		
N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:42:57 PM	1	Completed	Emailfrompage		
N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage		
N/A	w10.2015-11-05-033720.Emailfrompage1.pdf		11/5/2015 3:37:26 PM	11/5/2015 3:40:11 PM	1	Completed	Emailfrompage		

Page size: 15 Page: 1 of 2 1 to 15 of 20

In the example above, the Date Submitted column has been sorted chronologically, newest to oldest.

Filtering and searching tables

You may wish to filter the information in tables. Each column providing the filter facility has a text box beneath the heading column.

Type in the first letter and press **Enter** to find all entries beginning with that letter.

Type in the first couple of letters and press **Enter** to find all entries containing those letters in that sequence.

Type in the exact text string and press **Enter** to return to the full view, click the column heading.

Error Messages

Error messages are shown at the bottom of the page in red text. An error is displayed, for example, where a mandatory field in the page has not been filled correctly.

In the **Printer Driver** a warning or error is displayed in an external dialog. If there are two errors/warnings, both are displayed.

In **My Documents**, if there is more than one error, only the first occurring is displayed in the Printer Driver.

2 - 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.

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	8
Editing Attachments	10
Deleting Attachments	10

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:

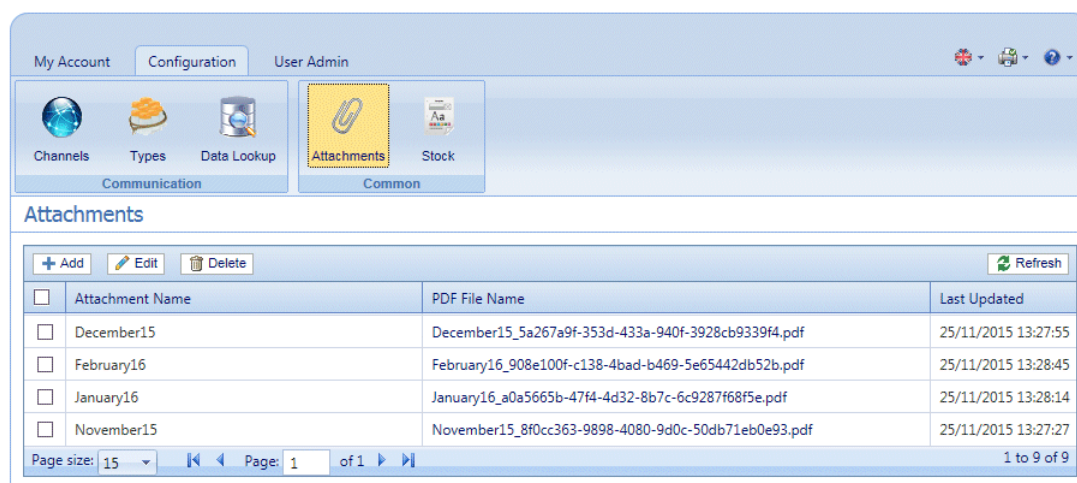
- Acrobat 4.0 (PDF 1.3)
- Acrobat 5.0 (PDF 1.4)
- Acrobat 6.0 (PDF 1.5)
- Acrobat 7.0 (PDF 1.6)

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.

The **Attachments** page is shown below:



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

To add a new attachment, follow the procedure below:

1. In **Attachments** click **Add**.
2. 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.
3. In **PDF File Name** click **Select..**

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

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

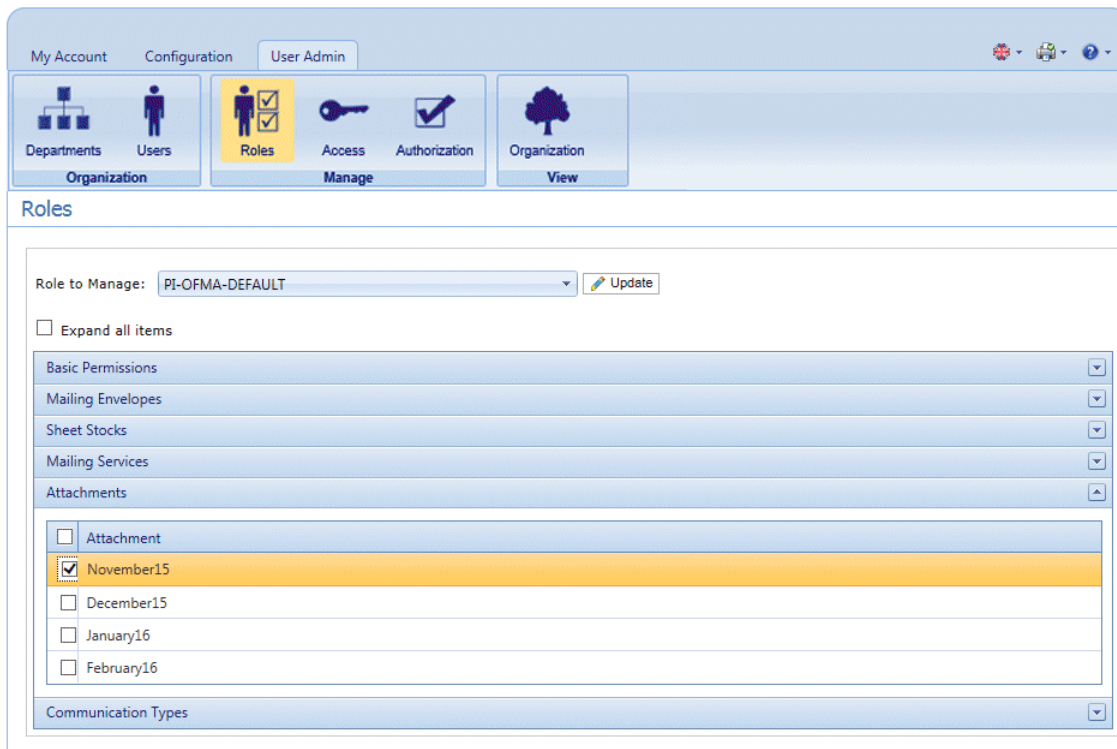
5. Click **Add**.

The new item is now shown in the table.

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

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

The **Roles** page is shown below:



8. From **Role to Manage** select the correct role.

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

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

11. 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.

3 - 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.

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

In this section

Adding Sheet Stock	12
Editing Stock	15
Deleting Stock	15

Adding Sheet Stock

Note: The Printer Driver treats Physical Stocks as double sided; therefore for Physical Stocks to be correct they must be 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.


The **Stock** page is shown below:


My Account

Configuration


User Admin


Channels

Types

Data Lookup

Communication

Attachments

Stock

Common







Sheet Stocks List

+ Add





Edit

Delete

Refresh

<input type="checkbox"/>	Name	Physical Stock	PDF File Name	Used on Sheet	Side Assignment	Last Updated
<input type="checkbox"/>	Plain Paper	<input type="checkbox"/>		All Sheets	 Overlay printed on Front; User can print Duplex	
<input type="checkbox"/>	Form01	<input type="checkbox"/>	Form01_cb0bc3a9-6fff-4baf-ae4b-6fec23b4df05.pdf	Sheet 1 only	 Overlay printed on Front; only allow User to print Simplex	25/11/2015 14:00:37
<input type="checkbox"/>	Form02	<input type="checkbox"/>	Form02_edda75f1-c052-41cc-87fd-217f31ca679f.pdf	All Sheets	 Overlay printed on Front; User can print Duplex	25/11/2015 14:01:14
<input type="checkbox"/>	Form04	<input type="checkbox"/>	Form04_4d27e658-78fb-4526-ab53-e020f785ad02.pdf	All Sheets	  Overlay is double sided; User can print Duplex	25/11/2015 14:02:02
<input type="checkbox"/>	Toronto	<input type="checkbox"/>	Toronto_10e0ba43-9bbe-44fe-be2d-11b5497176b4.pdf	Sheet 1 only	 Overlay printed on Front; User can print Duplex	25/11/2015 14:01:40

Page size: 15

Page: 1 of 2

1 to 15 of 16

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

To add sheet stock, follow the procedure below:

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

2. 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.
3. 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.
4. In **PDF File Name** click **Select**.
5. In the **Choose File** dialog, navigate to and select the required PDF file.
6. 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.

7. 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 on when the printing option for your job is single-sided, or to print a single-sided overlay on when the printing option for your job is double-sided in the Relay Communication Hub or Printer Driver will cause the job to fail.

8. Click **Add**.

The new item is now shown in the table.

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

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

The **Roles** page is shown below:

The screenshot shows the 'User Admin' interface with the 'Roles' tab selected. The 'Role to Manage' dropdown is set to 'PI-OFMA-DEFAULT'. The 'Sheet Stocks' section is expanded, showing a list of items: 'Sheet Stock' (unchecked), 'Plain Paper' (checked), 'Form01' (unchecked), 'Form02' (unchecked), 'Toronto' (unchecked), and 'Form04' (unchecked). Other sections like 'Basic Permissions', 'Mailing Envelopes', 'Mailing Services', 'Attachments', and 'Communication Types' are also visible.

11. From **Role to Manage** select the correct role.

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

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

14. 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.

4 - 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 pre-configured your postal classes, envelope types and range of physical inserts. Please contact your Pitney Bowes Administrator to make future changes.

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

In this section

Setting search criteria	17
Measuring the position of the search criteria	18
Enforcing options	19
Copying Communication Types	20
Editing Communication Types	21
Adding Communication Types	23
Testing Communications Type	31
Deleting Communication Types	32

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**.

Condition	Search Text	Printer Escape Code	Side #	Top Left X	Top Left Y	Width	Height
And		<input type="checkbox"/>					

And	COMP001	<input type="checkbox"/>	1	20.0	10.0	30.0	20.0
-----	---------	--------------------------	---	------	------	------	------

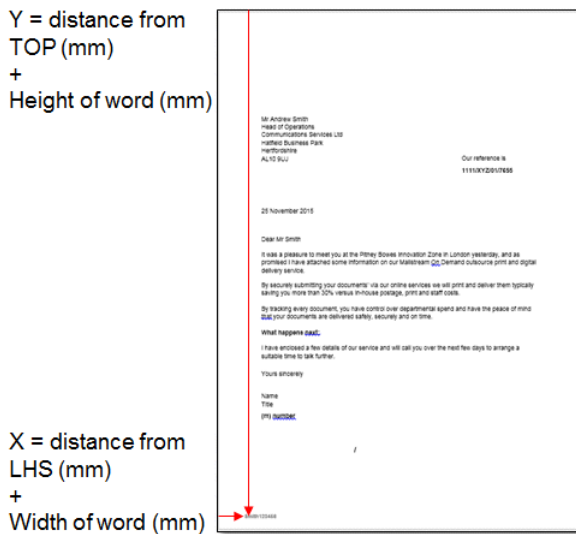
Note:

- 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.

Job Options

Edit

Enforce All: ☐

Set Job Options

Sides: Single Sided ☐

Sheet 1: Plain Paper ☐

Sheet 2: Plain Paper ☐

Job Reference: ☐

Page Nudge and Scale

Base Point: Center

Scale: 100.00 %

Shift X: 0.0 mm

Shift Y: 0.0 mm

Attachments

☐ Default

No records to display.

☐ Available Subset

No records to display.

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:

The screenshot shows the 'Communication Types' configuration page. At the top, there are tabs for 'My Account', 'Configuration', and 'User Admin'. Below these are icons for 'Channels', 'Types' (highlighted), 'Data Lookup', 'Attachments', and 'Stock'. The main content area is titled 'Communication Types' and contains a table with the following columns: 'Communication Type', 'Communication Channels', 'Authorisation Level', 'Order Number', and 'Status'. The table lists several communication types, including 'CL001 Simplex Split', 'DLSCW - WELSH', 'AR001', 'AR003', 'DLGRW PAYMENT REQUEST', 'Email', and 'DLSC PAYMENT REQUEST'. The 'Email' type is highlighted. The table also includes a 'Status' column with 'Active' or 'Inactive' indicators. At the bottom of the table, there is a pagination bar showing 'Page size: 15', 'Page: 1 of 2', and '1 to 15 of 22'.

Communication Type	Communication Channels	Authorisation Level	Order Number	Status
<input type="checkbox"/> CL001 Simplex Split		0	17	Active
<input type="checkbox"/> DLSCW - WELSH		0	3	Active
<input type="checkbox"/> AR001		0	7	Active
<input type="checkbox"/> AR003		0	9	Active
<input type="checkbox"/> DLGRW PAYMENT REQUEST		0	14	Inactive
<input type="checkbox"/> Email	@	0	2	Active
<input type="checkbox"/> Email	@	0	1	Active
<input type="checkbox"/> DLSC PAYMENT REQUEST		0	18	Active

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 23 for descriptions of the options to modify.

See [Enforcing options](#) on page 19.

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:

The screenshot shows the 'Roles' page in the 'User Admin' tab. At the top, there are tabs for 'My Account', 'Configuration', and 'User Admin'. Below these are icons for 'Departments', 'Positions', 'Users', 'Roles', 'Access', 'Authorisation', and 'Organisation'. The 'Roles' icon is highlighted. Below the icons, the 'Roles' page is displayed. It has a dropdown menu for 'Role to Manage' set to 'PI-OFMA-DEFAULT' and an 'Update' button. Below this is a checkbox for 'Expand all items'. A table of permissions is shown, with 'Communication Types' expanded. The 'Communication Types' table has a header 'Communication Type Name' and a list of types: 'Letter' (checked), 'Letter01', 'Letter02', and 'Letter03'.

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**.

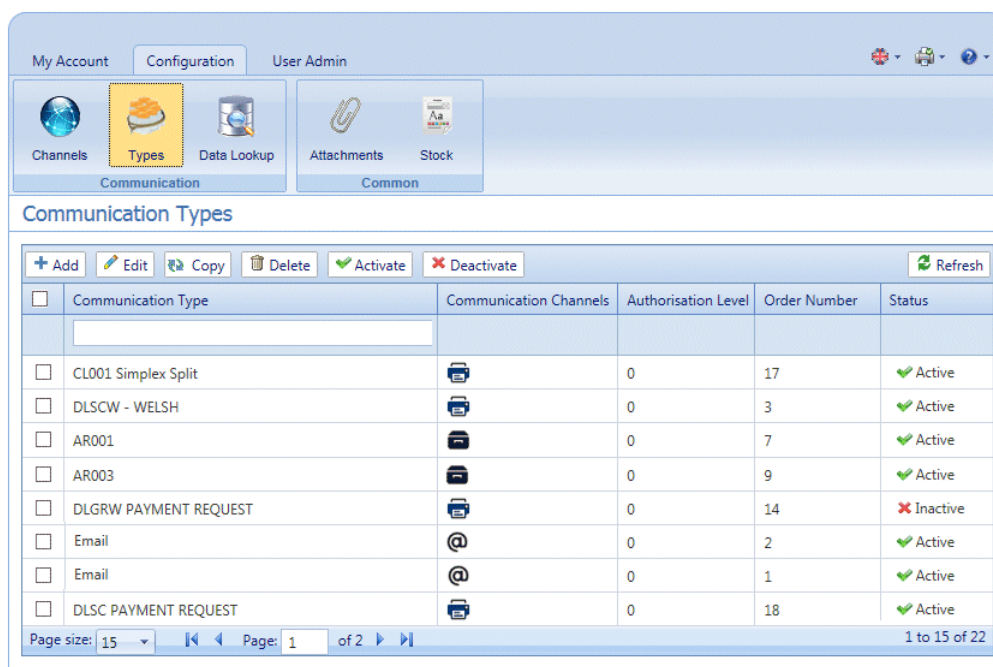
The edited item is now shown in the table.

- 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 31

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:



The screenshot shows the 'Communication Types' page in the Relay Communication Hub. The page has a navigation bar with 'My Account', 'Configuration', and 'User Admin'. Under 'Configuration', there are icons for 'Channels', 'Types' (selected), 'Data Lookup', 'Attachments', and 'Stock'. The main content area is titled 'Communication Types' and contains a table with columns: Communication Type, Communication Channels, Authorisation Level, Order Number, and Status. The table lists several communication types, including 'CL001 Simplex Split', 'DLSCW - WELSH', 'AR001', 'AR003', 'DLGRW PAYMENT REQUEST', 'Email', and 'DLSC PAYMENT REQUEST'. The status of each type is indicated by a green checkmark for 'Active' or a red X for 'Inactive'. At the bottom of the table, there is a pagination bar showing 'Page size: 15', 'Page: 1 of 2', and '1 to 15 of 22'.

Communication Type	Communication Channels	Authorisation Level	Order Number	Status
<input type="checkbox"/> CL001 Simplex Split		0	17	✓ Active
<input type="checkbox"/> DLSCW - WELSH		0	3	✓ Active
<input type="checkbox"/> AR001		0	7	✓ Active
<input type="checkbox"/> AR003		0	9	✓ Active
<input type="checkbox"/> DLGRW PAYMENT REQUEST		0	14	✗ Inactive
<input type="checkbox"/> Email		0	2	✓ Active
<input type="checkbox"/> Email		0	1	✓ Active
<input type="checkbox"/> DLSC PAYMENT REQUEST		0	18	✓ Active

2. In the **Communication Types** page click **Add**.

The following window is opened containing the fields required:

Communication Types

Edit Communication Type

Communication Type:

Authorisation Level:

Order Number:

Status: ✗ Inactive

☐ Expand All Items

- Search Criteria
- Split Criteria
- Move Items
- Extract Fields
- Job Options
- Channels

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:

Search Criteria

<input type="checkbox"/>	Condition	Search Text	Printer Escape Code	Side #	Top Left X	Top Left Y	Width	Height
	Condition: <input type="button" value="v"/> And	Search Text: <input type="text"/>	Printer Escape Code: <input type="checkbox"/>	Side #: <input type="text"/>	Top Left X: <input type="text"/> mm	Top Left Y: <input type="text"/> mm	Width: <input type="text"/> mm	Height: <input type="text"/> mm
<input type="button" value="+ Add"/> <input type="button" value="Cancel"/>								
<input type="checkbox"/>	And	COMP001	<input type="checkbox"/>	1	20.0	10.0	30.0	20.0

Page size: 15 Page: 1 of 1 1 to 1 of 1

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.

- Click **Add** and in **Edit Communication Type** click **Update**.
- 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:

The screenshot shows a 'Channels' dialog box. At the top, there's a 'Type' dropdown menu set to 'Communication Channel', an 'Enforced' checkbox, and a 'Send' button. Below this is a section for 'Communication Channel' with a dropdown menu set to 'Default Print Channel' and a 'Send' dropdown menu set to 'Today'. There are also 'Options' and 'Pre-printed Inserts' sections with various settings and checkboxes. At the bottom, there are '+ Add' and 'Cancel' buttons.

- Select the required **Communication Channel** from the list.
- Select all the other options you need. Click on a link, below, for descriptions.
 - [Splitting a job](#) on page 27
 - [Moving items](#) on page 28
 - [Extracting fields](#) on page 29

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

See [Enforcing options](#) on page 19.

Note: Contact Pitney Bowes if you need to add new Pre-Printed Inserts. See [for more information on attachments and inserts](#).

- 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:

The screenshot shows the 'Roles' page in the 'User Admin' tab. The 'Role to Manage' dropdown is set to 'PI-OFMA-DEFAULT'. Below this, there is a list of communication types with checkboxes. The 'Letter' type is checked, while 'Letter01', 'Letter02', and 'Letter03' are not. The 'Update' button is visible at the top right of the list.

Communication Type Name	Selected
Letter	<input checked="" type="checkbox"/>
Letter01	<input type="checkbox"/>
Letter02	<input type="checkbox"/>
Letter03	<input type="checkbox"/>

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 31

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 23. 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 23 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 23. 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.

The screenshot shows the 'Move Items' configuration window. It features a table with the following columns: Order, Action, Side #, Top Left X, Top Left Y, Width, Height, New Top Left X, New Top Left Y, and Copy to Cover Page. The 'Action' column is currently set to 'Move'. Below the table, there are input fields for various parameters, each followed by a unit 'in': *Side #, *Top Left X, *Top Left Y, *Width, *Height, *New Top Left X, and *New Top Left Y. There is also a 'Copy to Cover Page' checkbox. At the bottom of the panel are '+ Add' and 'Cancel' buttons. The status bar at the bottom indicates 'Page size: 15', 'Page: 1 of 1', and includes navigation arrows.

3. From **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 field to move.

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

5. From **Top Left Y** type in the top left coordinate of the field to move.
6. From **Width** type in the width of the item to be moved.
7. From **Height** type in the height of the item to be moved. You have now defined the item to be moved.
8. You need to define the location to which the item is to be moved. From **New Top Left X** type in the top left coordinate.

9. From **New Top Left Y** type in the top left coordinate of the field.
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 23 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 an 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 23. 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:

Order	Name	Type	Side #	Top Left X	Top Left Y	Width	Height	Derived Value	Lookup Arguments	Lookup Source	Capture
No records to display.											

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 30.
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 30.

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 23. 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:

Job Options

Edit

Enforce All: ☒

Set Job Options

Sides:	Single Sided	<input checked="" type="checkbox"/>
Sheet1:	Letterhead	<input checked="" type="checkbox"/>
Sheet2:	Plain Paper	<input checked="" type="checkbox"/>
Job Reference:	[[COMP001 REF]_[DATE]_COMP001] <input checked="" type="checkbox"/>	

Attachments ☒

<input type="checkbox"/> Default	<input type="checkbox"/> Available Subset
<input checked="" type="checkbox"/> Complaints Handling Procedure	

3. Click **Edit**.

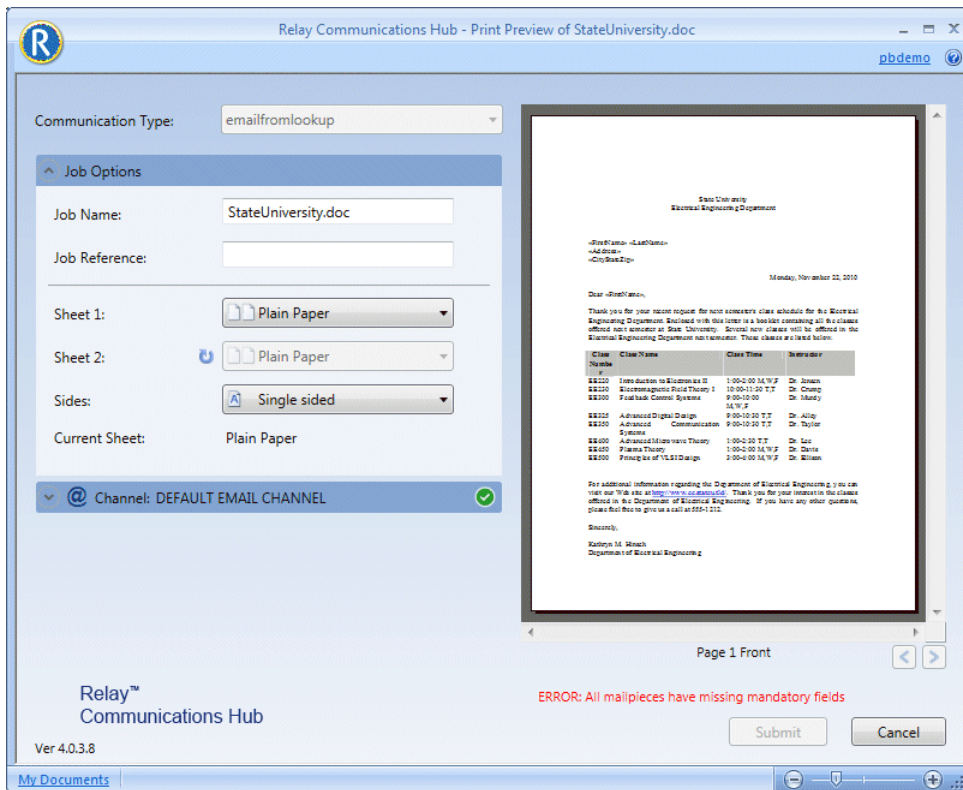
4. From **Sides** select whether to allow the **Double-** or **Single-sided** printing.
5. From **Sheet 1** select the type of physical paper on which the first page of each mail piece is to be printed.
6. From **Sheet 2** select the type of physical paper on which all subsequent pages of each mail piece 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 29. 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. From **Attachments** select the electronic attachments you wish to make available to the user.
9. From **Insets** select the physical inserts you wish to make available to the user.
10. 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.
11. Click **Update**.
- 12 Return to [Adding Communication Types](#) on page 23 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.

5 - Glossary

This section gives descriptions of the terms found in this guide.

In this section

Terms and Definitions

35

Terms and Definitions

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.
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.
Role	A group of settings which define user permissions and access to parts of the user interface and facilities.
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.
Pre-Printed Inserts	A physical published document inserted into the envelope with the mail piece at the time of printing.
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 Stock appears.
Search Criteria	The criteria for which an 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.

6 - Information

This section provides information on Pitney Bowes and where to find more information on this product.

In this section

More Information	37
Contact	37
Copyright	38
Trademarks	38

More Information

The following tools in the Relay Communication Hub Configuration tab are not covered in this guide.

- Communication Channels
- Data Look-up

For more information on any of these, please refer to the separate User Website Administration Guide

Contact

This section gives the contact, copyright and trademark information for Relay Communication Hub. How to contact Pitney Bowes regarding this product.

You will find full details of the configuration and operation of this product in the user documentation supplied.

Should you encounter any difficulties that you cannot resolve with aid of the user documentation, you will be able to obtain technical support from your supplier, or from Pitney Bowes.

Support Email Address:

software.support@pb.com

AMER: Hours: Monday - Friday from 08:00 – 20:00 EST excluding US Holidays
Phone: +1 800 367 6950
Or if dialing from outside the US: +1 518 285 7283

APAC: Hours: Monday – Friday from 08.00 - 18.00 AEST excluding Public Holidays
Phone: +1 800 648 899
Or if dialing from outside Australia : +61 2 9475 3500

EMEA: Hours: Monday - Friday from 9:00 am to 5:30 pm GMT, excluding Bank Holidays
Phone: +44 800 840 0001 (option 1, 8)

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:

Pitney Bowes
6 Hercules Way
Leavesden
Watford
WD25 7GS
UK

We may use or distribute the information supplied in any way we deem appropriate without incurring any obligation to the submitter of the information. © 2016. 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.



3001 Summer Street
Stamford CT 06926-0700
USA

www.pitneybowes.com