

# Relay<sup>™</sup> Communications Hub

Version 2.0

Print Manager Administrator Guide



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# 1 - About This Guide

This guide has been written with the System Administrator (subsequently known as the Administrator) in mind and describes the administrative functions of the Relay Communications Hub Print Manager. 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
- View your organization
- Manage attachments
- Manage sheet stock
- Manage communication types

From within the Relay Communications Hub website:

- View reports on completed jobs
- Manage user access
- Invite others to use Relay Communications Hub
- Edit your profile

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## Version History

Date	Comments
July 2016	Initial Version

## Related Documentation

Document Name	Date	Comments
Print Manager User Guide	July 2016	Describes the user functions of Relay Communications Hub.
Print Manager Operator Guide	July 2016	Describes the print room operations of Relay Communications Hub.

# 2 - Overview

Your clients have many systems, people, and processes to get their mail created, produced, and sent to customers. There are a lot of costs and complexity in the workflow including:

- Multiple prints and MFDs
- Multiple postage meters and postage accounts
- People printing and hand stuffing
- Multiple people touching documents leading to errors, delays and inconsistent quality
- Lack of control over branding and messaging

You need simple tools to keep up with changes in technology and customer requirements. Creating innovative solutions to challenges like these is what Pitney Bowes does.

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## Print Manager

The Relay Communications Hub Print Manager:

- Creates simplified, compelling documents
- Mitigates compliance and regulatory risks
- Maintains integrity and avoiding mistakes
- Automates costly manual processes
- Sends more electronic communications
- Manages costs: postage, print, staff, stationary, office space

The Relay Communications Hub Print Manager will decrease costs, errors, and waste, while increasing accuracy, speed, and revenue. It is a simple solution to capture and normalize desktop print streams, centralize them and deliver them back to your clients to print and mail.

The Print Manager enables users to easily submit their documents via Relay Communications Hub Print Driver. In addition, they can preview and submit documents with rules based mailing.

Central mail room operators get a single screen to manager print streams from across their organizations.

Central mail room chief operators set criteria, such as paper and envelope size, to bundle together jobs with similar attributes in order to maximize printer run time while minimizing printer down time. These criteria are "bundles" which can be set to run at specified times of when the bundle reaches a specified size. In addition the bundles can be used to take advantage of postal discounts.

Administrators manage users, user access and the options available in the Printer Driver.

## 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 one 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.

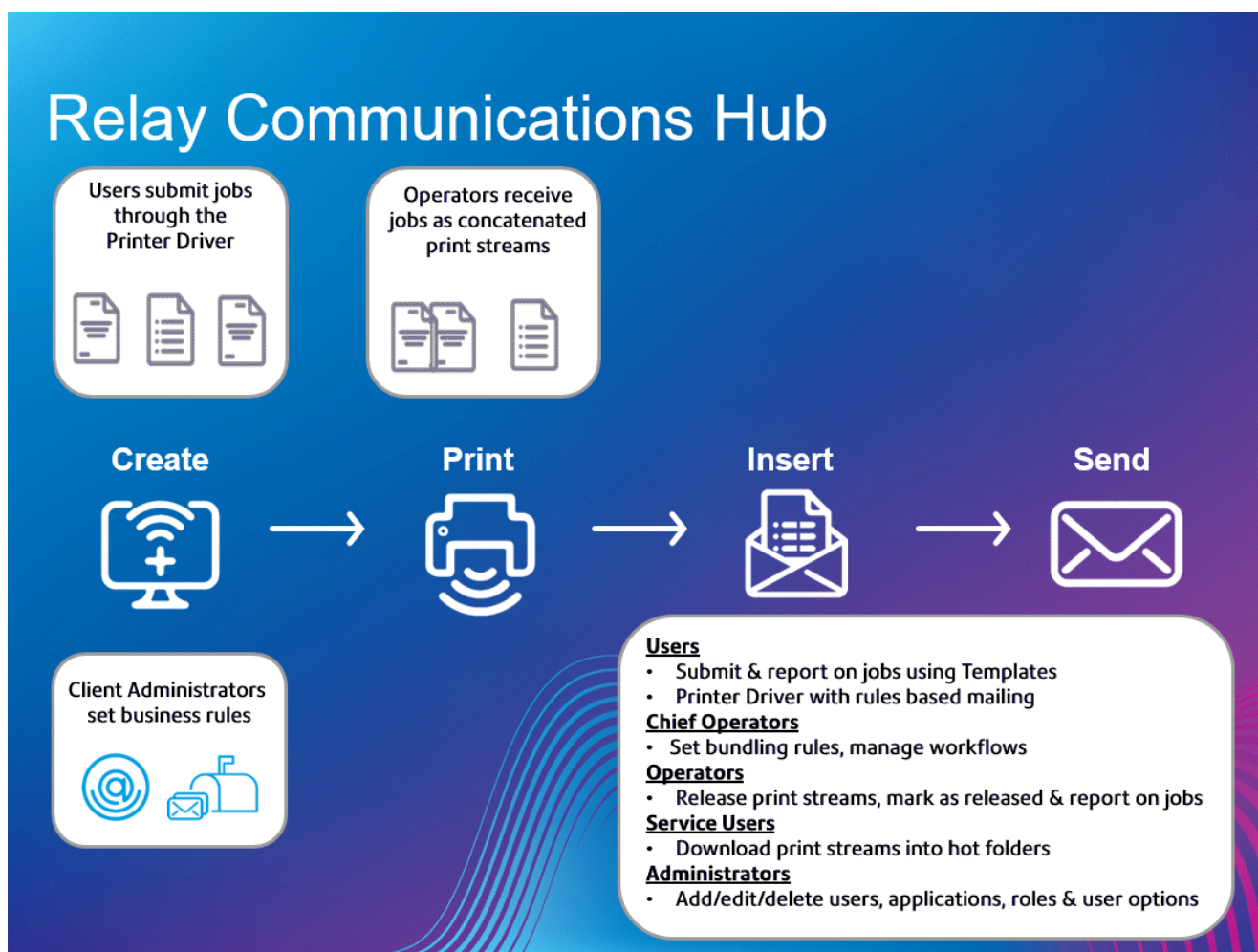
The following illustrates the flow of mail pieces through Relay Communications Hub.



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.

See the [glossary](#) for help on the terms used in this guide.



## Relay Communications Hub roles

There are five types of role:

- |                        |   |
|------------------------|---|
| <b>Users</b>           | <p>Submit their jobs to Relay Communications Hub through one of the following methods:</p> <ul style="list-style-type: none"> <li>• printing a job through the Printer Driver, or</li> <li>• creating a job in the Web Client</li> </ul>  |
| <b>Operators</b>       | <p>Undertake the following tasks:</p> <ul style="list-style-type: none"> <li>• manually release print streams to download</li> <li>• physically load and set printers and inserters</li> <li>• oversee printing and mailing</li> <li>• mark jobs as printed</li> </ul>  |
| <b>Chief Operators</b> | <p>Undertake the following tasks:</p> <ul style="list-style-type: none"> <li>• define bundles by setting criteria by which jobs from all submitting users are concatenated into a single print stream</li> <li>• 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</li> </ul>   |
| <b>Service User</b>    | <p>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.</p> <p>Undertake the following tasks:</p> <ul style="list-style-type: none"> <li>• Download the Desktop Client</li> <li>• Use the Relay Communications Hub desktop client's hot folders to automatically process files</li> <li>• Downloads print streams though the Desktop Client.</li> </ul> |
| <b>Administrators</b>  | <p>Undertake the following tasks:</p> <ul style="list-style-type: none"> <li>• Create users</li> <li>• Define your organization by creating departments and assigning users</li> <li>• Manage roles</li> <li>• Manage access pools</li> <li>• View your organization</li> <li>• Manage attachments</li> <li>• Manage sheet stock</li> <li>• Manage communication types</li> </ul>   |

- View reports on completed jobs
- View and download reports on completed jobs
- Manage user access
- Invite others to use Relay Communications Hub

See the [glossary](#) for help on the terms used in this guide.

## The Administrator Function

Pitney Bowes will create your Company, Company Administrator (you) and the Service User, setting the email addresses for you and the Service User in Relay Communications Hub.

Your role as the administrator is defined by where you are in the world:

### In the US and Canada

For those companies using Relay Communications Hub in the US and Canada, you need to create an organization hierarchy by defining Departments and Users. This is done in the User Website.

See:

- [Getting Started with The User Website](#) on page 13
- [Defining Your Organization](#) on page 15

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 Client website 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 24
- [Defining Access Pools](#) on page 29
- [Viewing Your Organization](#) on page 37

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:

- [Configuring Relay Communications Hub](#) on page 40
- [Managing Attachments](#) on page 43
- [Managing Sheet Stock](#) on page 47

- [Managing Communication Types](#) on page 52

You then need to assign roles for users in the Relay Communications Hub Web Client.

See:

- [Getting Started with Print Manager](#) on page 70
- [Managing User Access and Roles](#) on page 84

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

See:

- [Getting Started with Print Manager](#) on page 70
- [Viewing Job Reports](#) on page 74

## In the rest of the world

For those companies using Relay Communications Hub outside of the US and Canada, you need to create an organization hierarchy by defining Departments and Users.

See:

- [Getting Started with The User Website](#) on page 13
- [Defining Your Organization](#) on page 15

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 Client website and Desktop client. You can create appropriate roles and permissions where users need higher privileges. User passwords can only be changed through an Administrator.

See:

- [Managing Roles](#) on page 24
- [Defining Access Pools](#) on page 29
- [Viewing Your Organization](#) on page 37

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:

- [Configuring Relay Communications Hub](#) on page 40
- [Managing Attachments](#) on page 43
- [Managing Sheet Stock](#) on page 47
- [Managing Communication Types](#) on page 52

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

See:

- [Getting Started with Print Manager](#) on page 70
- [Viewing Job Reports](#) on page 74

# 3 - Getting Started with The User Website

The **User Website** tab provides all the tools required for defining your Relay Communications Hub users and hierarchy. You are able to create a structure for your organization by creating Departments, Roles and Users which you can then add to the **Organization Tree**. In addition, you can create Access roles, which will specify which groups of users have access to which parts of Relay Communications Hub. Finally, you will be able to manage the attachments, sheet stock and communication types available to Printer Driver users.

The procedures described in the following sections are all performed on the User Website:

- **Defining Your Organization** on page 15
- **Managing Roles** on page 24
- **Defining Access Pools** on page 29
- **Viewing Your Organization** on page 37
- **Configuring Relay Communications Hub** on page 40
- **Managing Attachments** on page 43
- **Managing Sheet Stock** on page 47
- **Managing Communication Types** on page 52

**Note:** If you are using Relay Communication Hub in the US or Canada, users, user roles and access are managed through the **Applications Setting** menu. See **Inviting users** on page 88, **Assigning roles** on page 93.

## In this section

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# Signing in to the user website

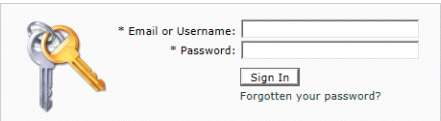
Pitney Bowes will provide you with Administrator credentials with which you can sign in, follow the procedure below:

1. In the address bar type the URL of 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 **My Documents** website in a new tab. The **Sign in** page is displayed.



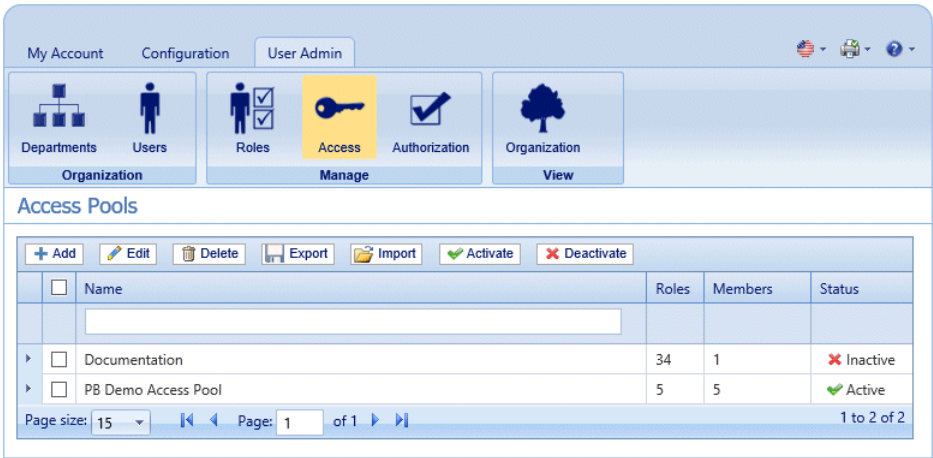
2. Type in your user credentials. By default this is your email address and a default password of "password".

**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.

**Note:** After five 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.

3. Click **Sign in**.

The **User Website** is then displayed.



# 4 - Defining Your Organization

The **User Admin** tab provides all the tools required for defining your Relay Communications Hub users and hierarchy. You are able to create a structure for your organization by creating Departments, Roles and Users which are added to your **Organization Tree**. In addition, you can create Access and Authorization Pools, 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

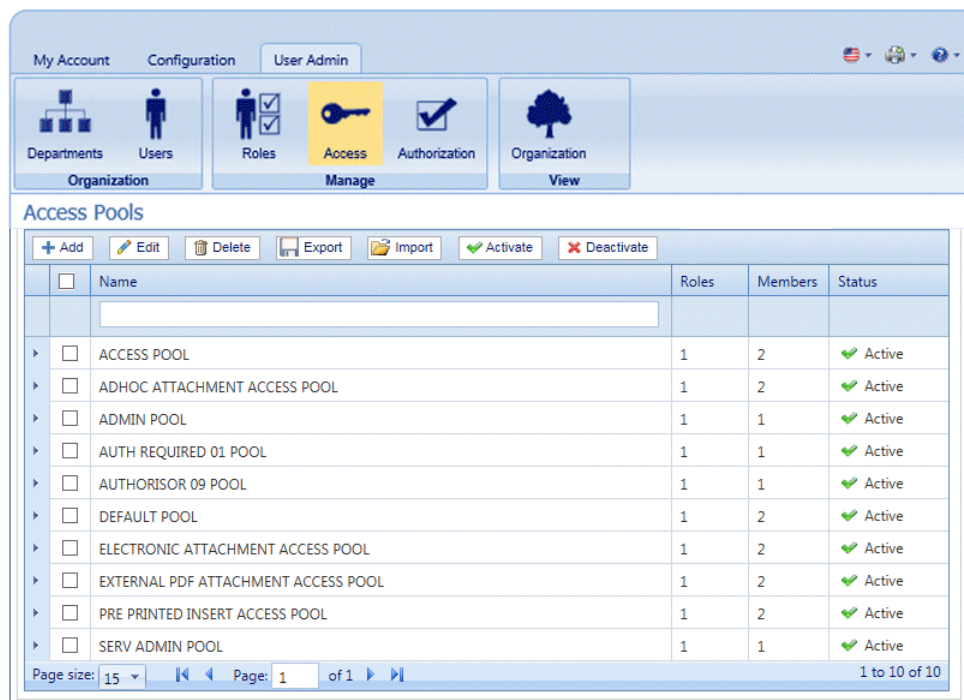
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# Defining Your Organization

The **User Admin** tab of the website gives you the tools by which you can define your organization. This is done to create a structure on which the Relay Communications Hub system works. The **User Admin** tab is shown below:



Your organization is shown as follows:

- Departments** The departments in your company.
- Users** Users working within the Departments.
- Roles** Roles of users.
- Access** The areas of Relay Communications Hub to which users have access.

Each of these pages contain similar tools for adding, editing and deleting the information for the elements of your organization.

The **Organization** page contains a hierarchical view your organization, its main purpose is to show the structure of departments, users and roles.

The **Departments** page is the first page shown when the **User Admin** tab is opened; click the icon in the ribbon to open the required page.

You may create a `CSV` file of the information for your company and import it in the **Departments** page.

## Adding users

The first step in defining your organization is to add users, once this is done, at least one department must be defined, and then roles for users. Once defined, these can be seen in the Organization Tree.

The **Add** function is available in almost every Relay Communications Hub page. The process is the same for each, only the information shown in the page is different. The **Users** page is shown, below, the **Departments** pages and functions are the same.

To add users, follow the procedure, below:

1. In the **User Admin** tab, click the **User** or **Users** ribbon icon to open the required page.
2. Click **Add**.
3. A window is opened containing the fields required, shown below. Complete these and click **Add**.

**Note:** The Parent Department is selected by default. Add the user to the Departments you create in [Adding departments](#)

The new user is shown in the table.

- Once you have created all the Users you require, click **Email new user passwords** send an email containing the password required to sign in to Relay Communications Hub to each new user.

**Note:** We recommend that you use meaningful names for **Users** to avoid confusion.

The new users can be seen in Users table and in the Organization Tree assigned to the Parent Department.

**Warning:** You need to add users to the Departments you create in [Adding departments](#).

You need to add Roles to the Users you create in [Adding roles](#).

For instructions on importing a `csv` file refer to [Importing data](#)

## Adding departments and assigning users

The **Add** function is available in almost every Relay Communications Hub page. The process is the same for each, only the information shown in the page is different. The **Departments** page is shown, below, the Users pages and functions are the same.

Department Name	Parent Department	Address Line 1	Address Line 2	Address Line 3	Town	State	Post/Zip Code	Country	Logo
dept	-- Top Level Department --								

To add departments, follow the procedure, below:

- In the **User Admin** tab, click the **Departments** ribbon icon to open the page.
- Click **Add**.
- A window is opened containing the **Department Name** field, type in a name.

**Note:** The **Parent Department** is a preexisting default department called dept, to rename it to something more meaningful, for example, your company name, use the [Editing](#) function.

- Click **Add**.

This opens the panel shown below:

5. Select **Add New Return Address** and complete the fields.

**Note:** If you have already specified a Return Address, you may prefer to use **Select from Existing Return Address** and choose the required address from the table.

6. Click **Update**.

The new address is shown in the table at the bottom of the tab.

7. Click the **Members** tab to open it.

8. Click **Add** to open the following:

	First Name	Last Name	User Name	User Email	Department
<input type="checkbox"/>					
<input type="checkbox"/>	Eliza	Doolittle	EDoolittle	edoolittled@mail.com	dept
<input type="checkbox"/>	Henry	Higgins	HHiggins	hh@mail.com	dept
<input type="checkbox"/>	Hugh	Pickering	HPickering	hpickering@mail.com	dept
<input type="checkbox"/>	Freddy	Eynsford-Hill	FHill	feh@mail.com	dept
<input type="checkbox"/>	Zoltan	Karpathy	Zoltan	zkarpathy@mail.com	dept

9. From the table select the required users.

10. Click **Add**.

The selected users are removed from the table and cannot be added again, however, they can be added to a different department.

11. Click **Close** to return to the **Members** page.

12. Click **Cancel** to return to the **Departments** page.

**13.** Create as many Departments as you require.

**Note:** We recommend that you use meaningful names for **Departments** to avoid confusion.

The new departments can now be seen in the Departments table and Organization Tree. Click on a department name to open a window showing the department's structure.

For instructions on importing a `CSV` file refer to [Importing data](#)

## 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. Open the **User Admin** tab.
2. Click the **Departments** or **Users** ribbon icon to open the required page.
3. Select the **Departments** or **Users** you wish to edit.
4. Click **Edit**.
5. 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 data

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

The **Delete** process is the same for Departments and Users.

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

1. Open the **User Admin** tab.
2. Click the **Departments** or **Users** ribbon icon to open the required page.
3. 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.

4. Click **Delete**.

5. 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.

## 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.

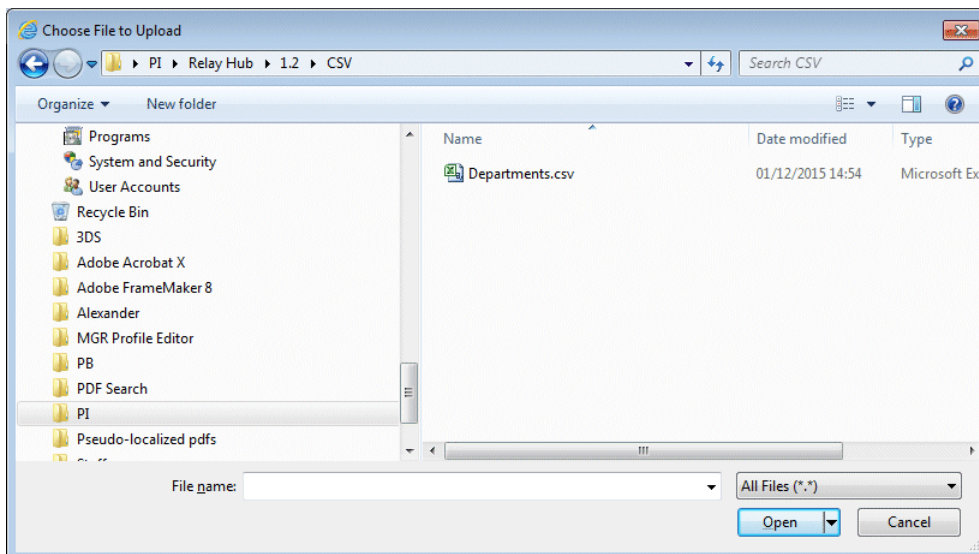
The fields required in the `csv` file are the same as the fields given in the table if you were to add elements manually, each user must appear on a separate line.

Refer to [CSV File Formats](#) on page 104 for examples of how to layout your `csv` file.

To import information from a `csv` file:

1. Ensure that the media or drive on which the `csv` file resides is available and navigable.
2. Open the **Departments** page by clicking its icon in the ribbon.
3. In the **Import** area click **Select**

The **Choose File to Upload** dialog is displayed:



4. Navigate to and select the required file.
5. Click **Open**. The **Choose File to Upload** dialog closes.
6. Back in the **Departments** page click **Import**.



The table within the relevant page is filled with the imported data, this can be edited by selecting the item required and clicking **Edit**, modifying the information and then clicking **Update**.

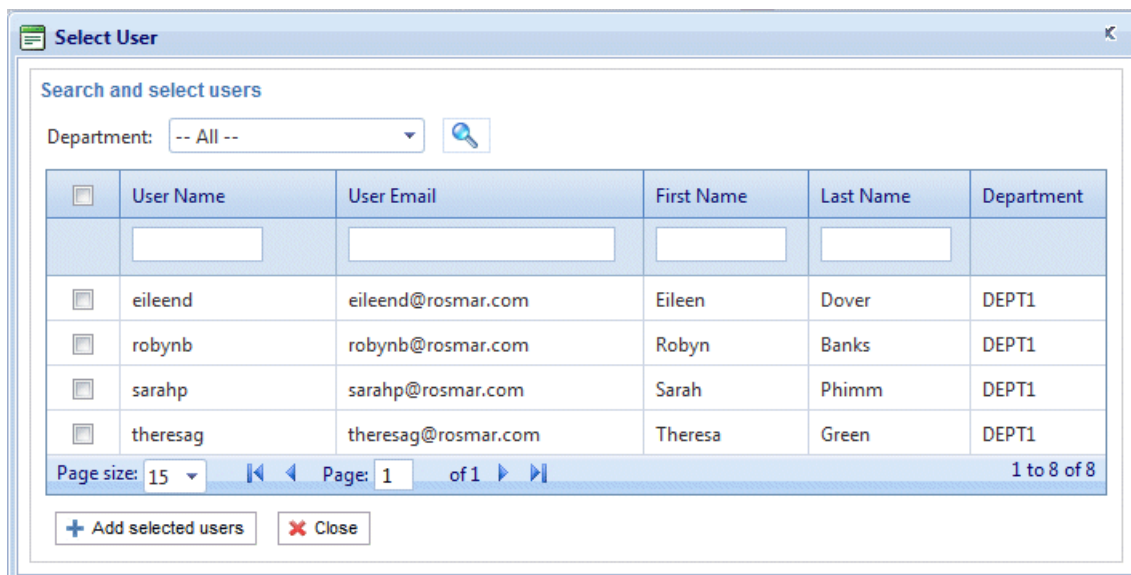
### Warning:

The new information is now available in the Departments and users tables as well as in the Organization Tree.

## 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.

Many of the tables within the Relay Communications Hub website may be filtered. The **Select User** table, is given, below, as an illustration.



The screenshot shows a window titled "Select User" with a search bar and a table of users. The search bar has a "Department" dropdown set to "-- All --" and a search icon. The table has columns for "User Name", "User Email", "First Name", "Last Name", and "Department". Below the table is a pagination bar showing "Page size: 15", "Page: 1 of 1", and "1 to 8 of 8". At the bottom are buttons for "+ Add selected users" and "X Close".

	User Name	User Email	First Name	Last Name	Department
<input type="checkbox"/>					
<input type="checkbox"/>	eileend	eileend@rosmar.com	Eileen	Dover	DEPT1
<input type="checkbox"/>	robynb	robynb@rosmar.com	Robyn	Banks	DEPT1
<input type="checkbox"/>	sarahp	sarahp@rosmar.com	Sarah	Phimm	DEPT1
<input type="checkbox"/>	theresag	theresag@rosmar.com	Theresa	Green	DEPT1

Each column provides the search/filter facility, all you need do is start typing in the text box of the required 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 or type in the exact text string for which you are reaching 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. If there is more than one error, only the first occurring is displayed.

# 5 - 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.

**Predefined Roles** on page 106 lists the Roles that have been pre-configured for you.

**Note:** Administrators, by default, do not have access to all of Relay Communication Hub. If you need to see all screens and use all functionality, you need to assign yourself all roles.

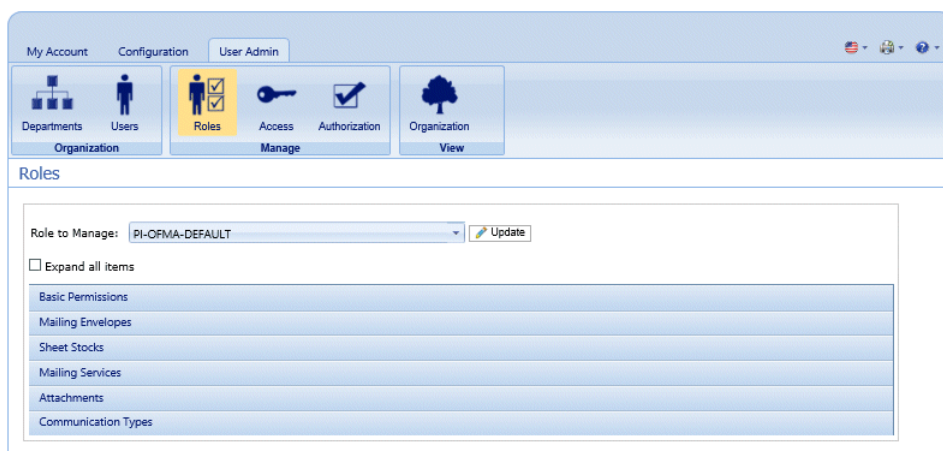
---

## In this section

## 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.

The **Roles** page is shown below:



Available permissions are listed in six categories, shown above. 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**.

Role to Manage: New Role + Add

\* Role Name:

☐ Expand all items

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

- 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.

- Select the new role's name from the **Roles to Manage**.
- Click on the **Basic Permissions** box, shown below, to expand it.

Basic Permissions

**Sides**

Single Sided: ☒

Double Sided: ☒

**Colour**

Black and White: ☒

Colour: ☒

- Check the box adjacent to the required item, for example, Color.
- Click **Sheet Stocks** to display the list of those available.

The screenshot shows the 'User Admin' section of a software interface. Under the 'Roles' tab, a dropdown menu shows 'PI-OFMA-DEFAULT' with an 'Update' button next to it. Below this, there's a checkbox for 'Expand all items'. A list of categories is shown: 'Basic Permissions', 'Mailing Envelopes', 'Sheet Stocks', 'Mailing Services', 'Attachments', and 'Communication Types'. The 'Sheet Stocks' category is expanded, showing a list of items: 'Sheet Stock', 'Plain Paper' (checked), 'Form01', 'Form02', 'Toronto', and 'Form04'.

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.

# 6 - 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

---

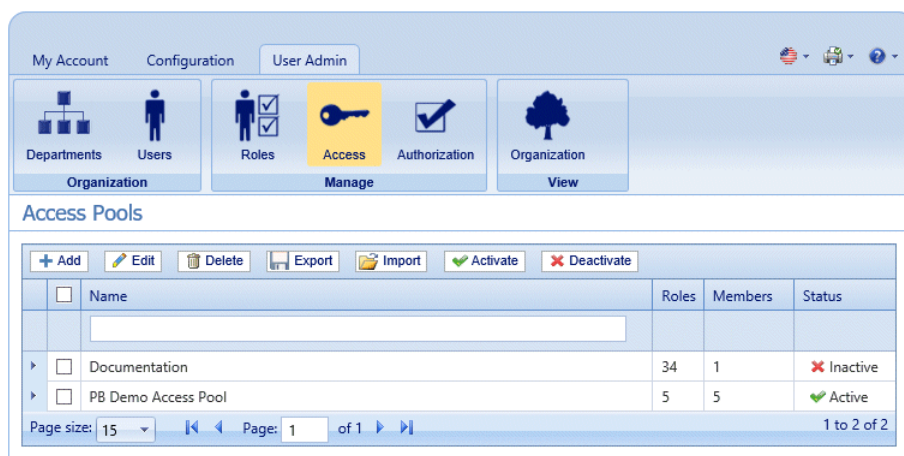
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## Editing an Access Pool

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

The **Access Pools** page is shown below:



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

1. Select the **Default Access Pool**.
2. Click **Edit**.
3. A window is opened containing the fields required.

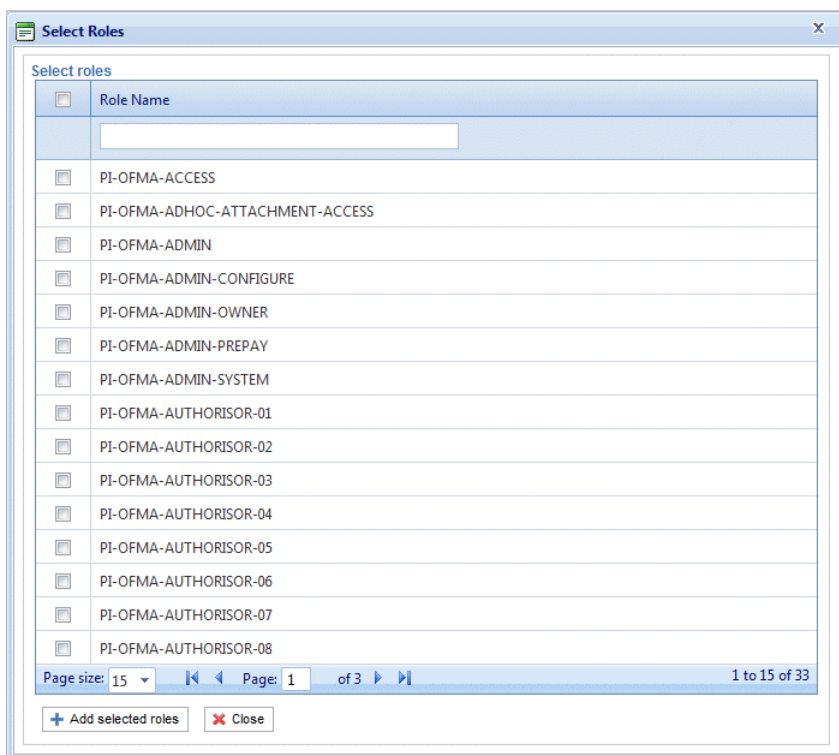
The **Access Pool Details** page is opened, shown below:

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

4. 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.

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

There are then added to the access pool.

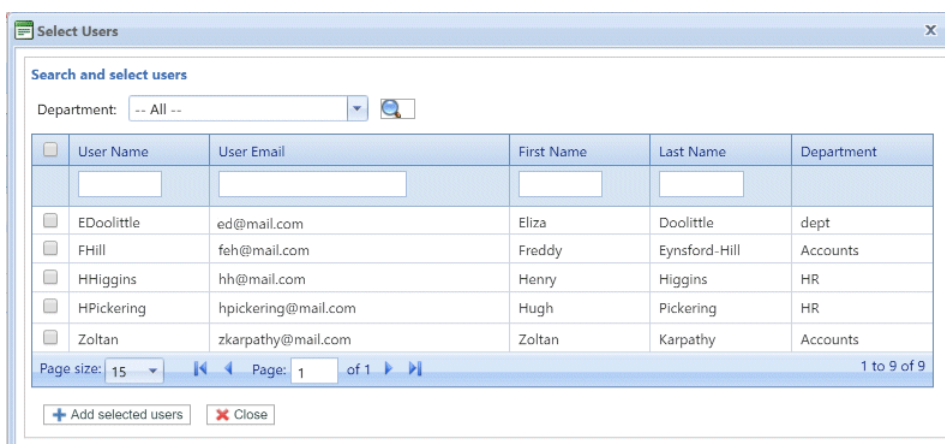
7. Click **Close** to return to the **Access Pools Details** page.

The added roles appear in the table.

8. Open the **Members** tab.

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

9. 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.

10. Place a check mark in the box adjacent to the required roles.
11. Click **Add selected roles**. There are then added to the access pool.
12. Click **Close** to return to the **Access Pools Details** page. The added roles appear in the table.
13. Click **Update** and **Close** to return to the **Access Pools** page.
14. 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.

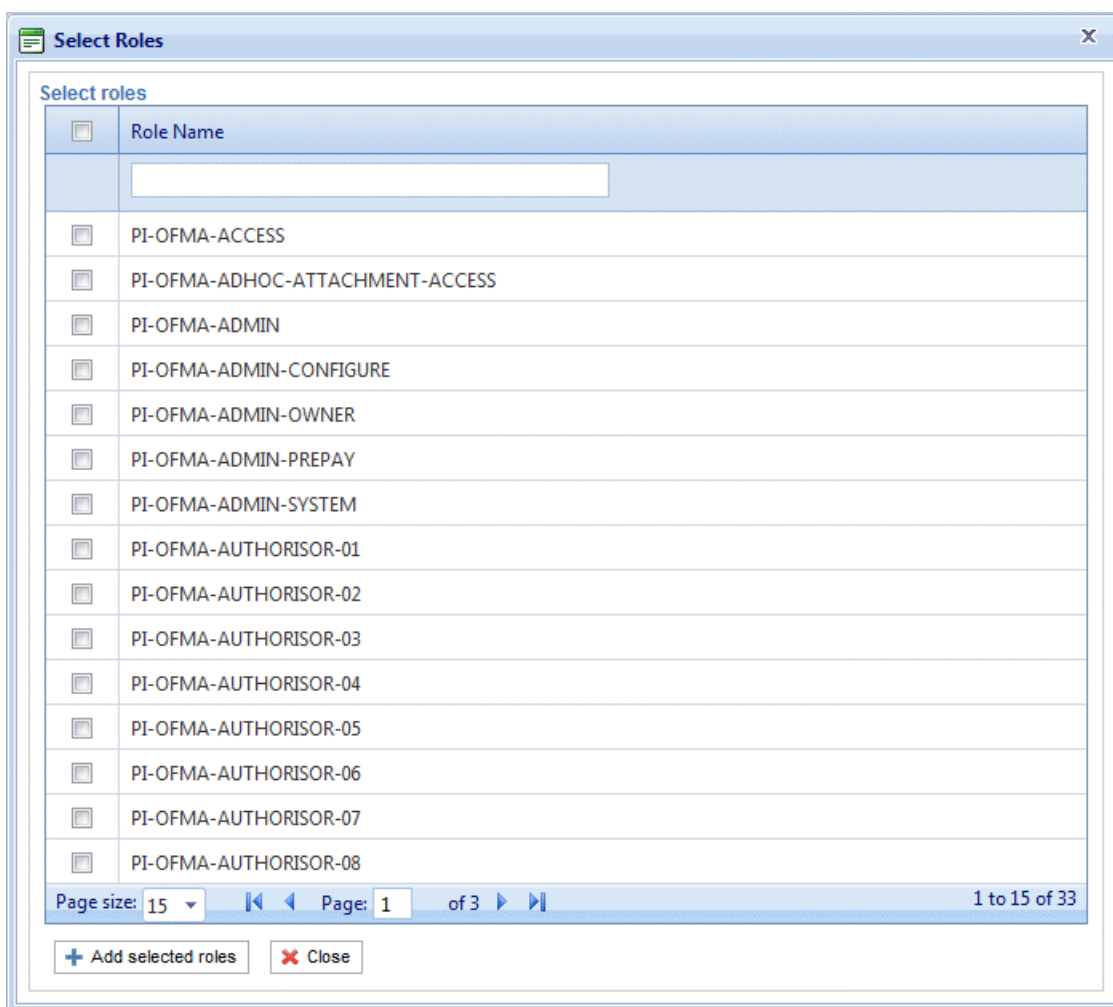
The **Access Pool Details** page is opened, shown below:

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 Users**

Search and select users

Department: -- All --

<input type="checkbox"/>	User Name	User Email	First Name	Last Name	Department
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	EDoolittle	ed@mail.com	Eliza	Doolittle	dept
<input type="checkbox"/>	Fhill	feh@mail.com	Freddy	Eynsford-Hill	Accounts
<input type="checkbox"/>	HHiggins	hh@mail.com	Henry	Higgins	HR
<input type="checkbox"/>	HPickering	hpickering@mail.com	Hugh	Pickering	HR
<input type="checkbox"/>	Zoltan	zkarpthy@mail.com	Zoltan	Karpthy	Accounts

Page size: 15 Page: 1 of 1 1 to 9 of 9

+ Add selected users X Close

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.



# 7 - Viewing Your Organization

The Organization Tree is a hierarchical view your organization, its main purpose is to display the structure of the departments and users already created.

## In this section

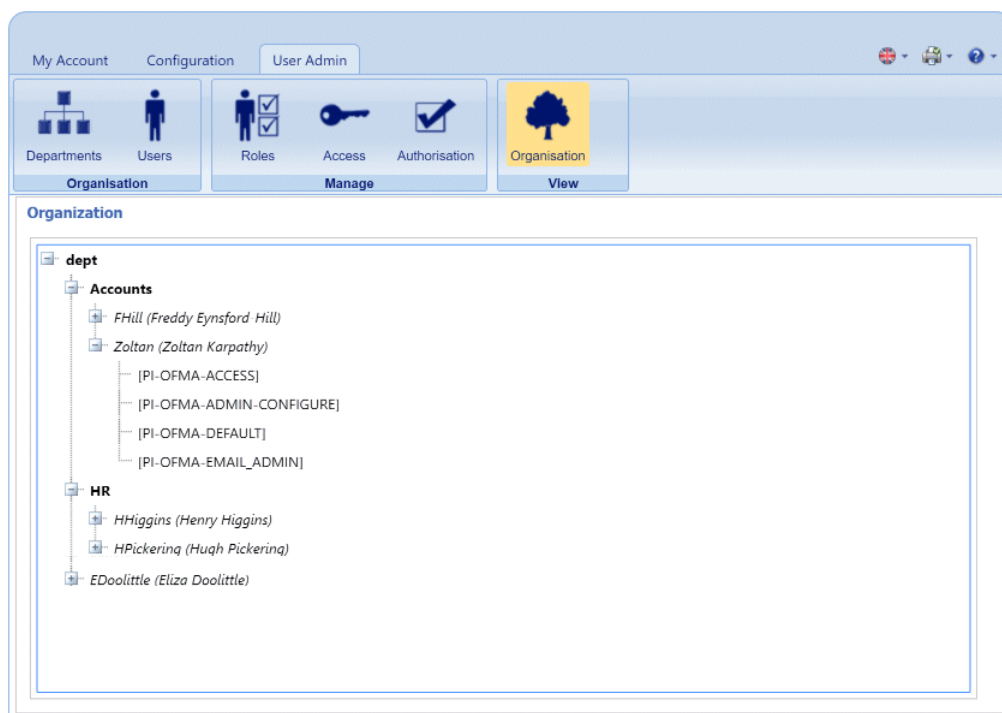
---

Your Organization

38

## Your Organization

The **Departments** page is the first page shown when the **User Admin** tab is opened; click **Organization** in the ribbon to open the page.



By default the branches of the tree are collapsed. Click  to expand each one you need to see.

The Organization tree hierarchy is as follows:



<b>Parent Department</b>	This department contains all other elements of the tree. Expand this branch to show the departments you created. In the above example, the Parent Department is dept.
<b>Departments</b>	The departments created as described earlier in this guide. You may have created sub-departments which are displayed when you expand this branch. In the above example, the departments are Accounts and HR.
<b>Users</b>	Displays the users added to that department. In the example, Freddy Eynsford-Hill and Zoltan Karpathy are members of the Accounts department. Henry Higgins and Hugh Pickering are members of HR.

**Note:** Note that Eliza Doolittle is a member of the Parent Department, dept, this means that she has not yet been added to a department.

In all cases the user name is given with the persons name in parentheses.

User branches can also be expanded.

**Roles** The use roles are shown once the user branch is expanded. In the example, Zoltan Karpathy has four roles.

Clicking  expands the branches in the Organizations page and clicking  collapses them.

# 8 - 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.

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## 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									
▶	<input type="checkbox"/>	Authorized	Job Name	Job Reference	Date Submitted ▼	Completed Date	Pages	Job Status	Communication Type
▶		N/A	<a href="#">w10.2015-11-09-023905.Emailfrompagetest.pdf</a>		11/9/2015 2:39:16 PM	11/9/2015 2:42:45 PM	1	Completed	Emailfrompage
▶		N/A	<a href="#">w10.2015-11-09-023905.Emailfrompagetest.pdf</a>		11/9/2015 2:39:12 PM	11/9/2015 2:41:26 PM	1	Completed	Emailfrompage
▶		N/A	<a href="#">w10.2015-11-09-023905.Emailfrompagetest.pdf</a>		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage
▶		N/A	<a href="#">w10.2015-11-09-023905.Emailfrompagetest.pdf</a>		11/9/2015 2:39:12 PM	11/9/2015 2:42:57 PM	1	Completed	Emailfrompage
▶		N/A	<a href="#">w10.2015-11-09-023905.Emailfrompagetest.pdf</a>		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage
▶		N/A	<a href="#">w10.2015-11-05-033720.Emailfrompage1.pdf</a>		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.

# 9 - 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

---

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## 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:

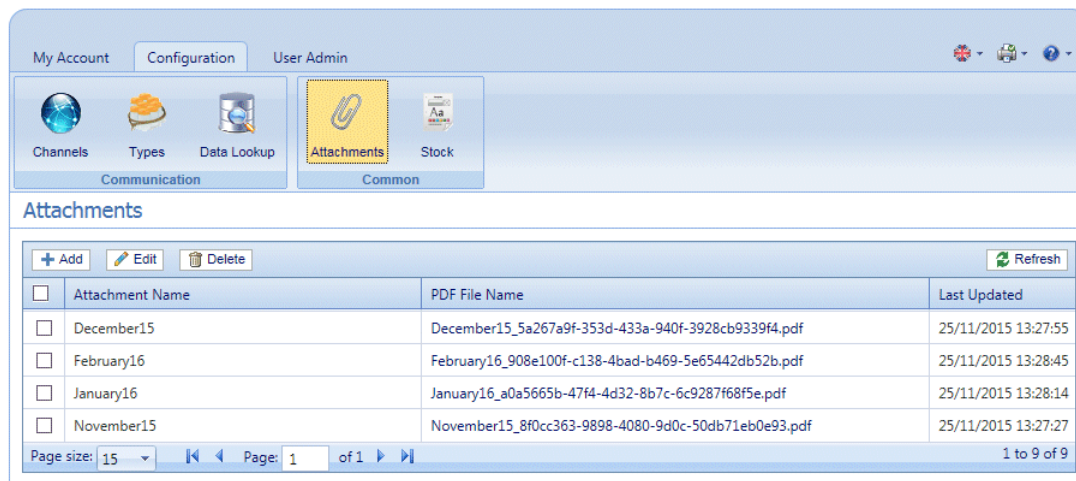
- Acrobat 4.0 (PDF 1.3)
- Acrobat 5.0 (PDF 1.4)
- Acrobat 6.0 (PDF 1.5)
- Acrobat 7.0 (PDF 1.6)

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:

My Account Configuration User Admin

Departments Users Roles Access Authorization Organization

Organization Manage View

Roles

Role to Manage: PI-OFMA-DEFAULT Update

☐ Expand all items

Basic Permissions

Mailing Envelopes

Sheet Stocks

Mailing Services

Attachments

☐ Attachment

☒ November15

☐ December15

☐ January16

☐ February16

Communication Types

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.

# 10 - 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.

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## 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

Attachments


Stock


Communication

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.

<b>Overlay printed on Front; only allow User to print Simplex</b>	The overlay is printed on the front sides only. The user can print this document in single sided mode only.
<b>Overlay printed on Front; User can print Duplex</b>	The overlay is printed on the front sides only. This document can be printed single or double sided.
<b>Overlay printed on Back; only allow User to print Simplex</b>	The overlay is printed on the back sides only. This document can be printed single sided only.
<b>Overlay printed on Back; User can print Duplex</b>	The overlay is printed on the back sides only. This document can be printed single or double sided.
<b>Overlay printed on both sides; only allow User to print Simplex</b>	The overlay is printed on the both sides. This document can be printed single sided only.
<b>Overlay is double sided; only allow User to print Simplex</b>	The overlay is double sided. This document can be printed single sided only.
<b>Overlay is double sided; User can print Duplex</b>	The overlay is double sided. This document can be printed single or double sided.
<b>Note:</b> 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' section of the application. The 'Roles' tab is active. The 'Role to Manage' dropdown is set to 'PI-OFMA-DEFAULT'. The 'Expand all items' checkbox is unchecked. The 'Sheet Stocks' section is expanded, showing a list of items with checkboxes: '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 collapsed.

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.



# 11 - 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

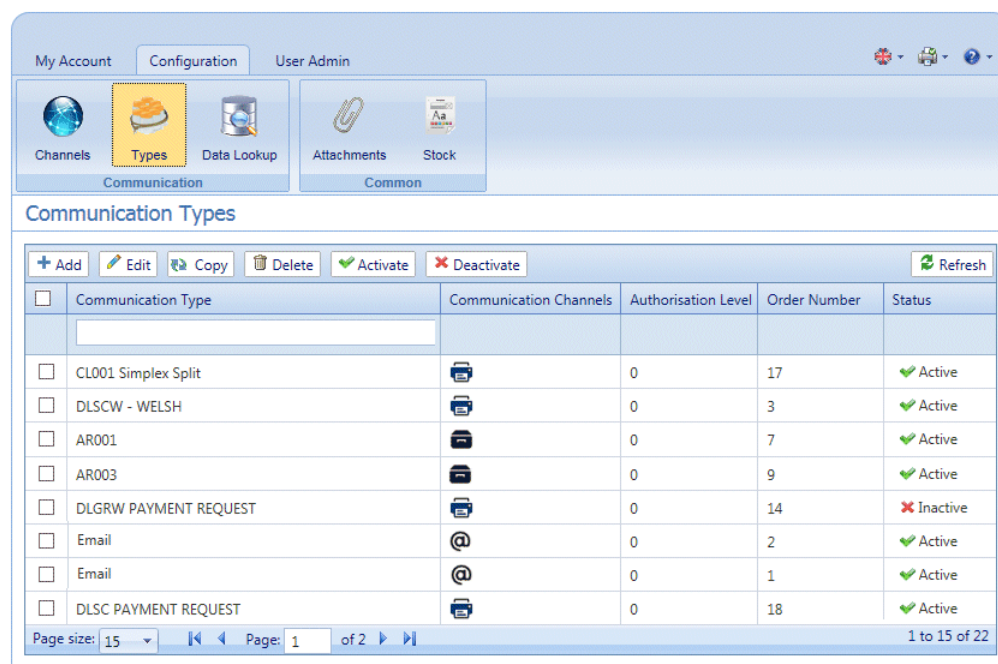
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## Copying Communication Types

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' management page. At the top, there are tabs for 'My Account', 'Configuration', and 'User Admin'. Below these are icons for 'Channels', 'Types', 'Data Lookup', 'Attachments', and 'Stock'. The 'Types' icon is highlighted. The main section is titled 'Communication Types' and contains a table with the following data:

<input type="checkbox"/>	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

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'.

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**.

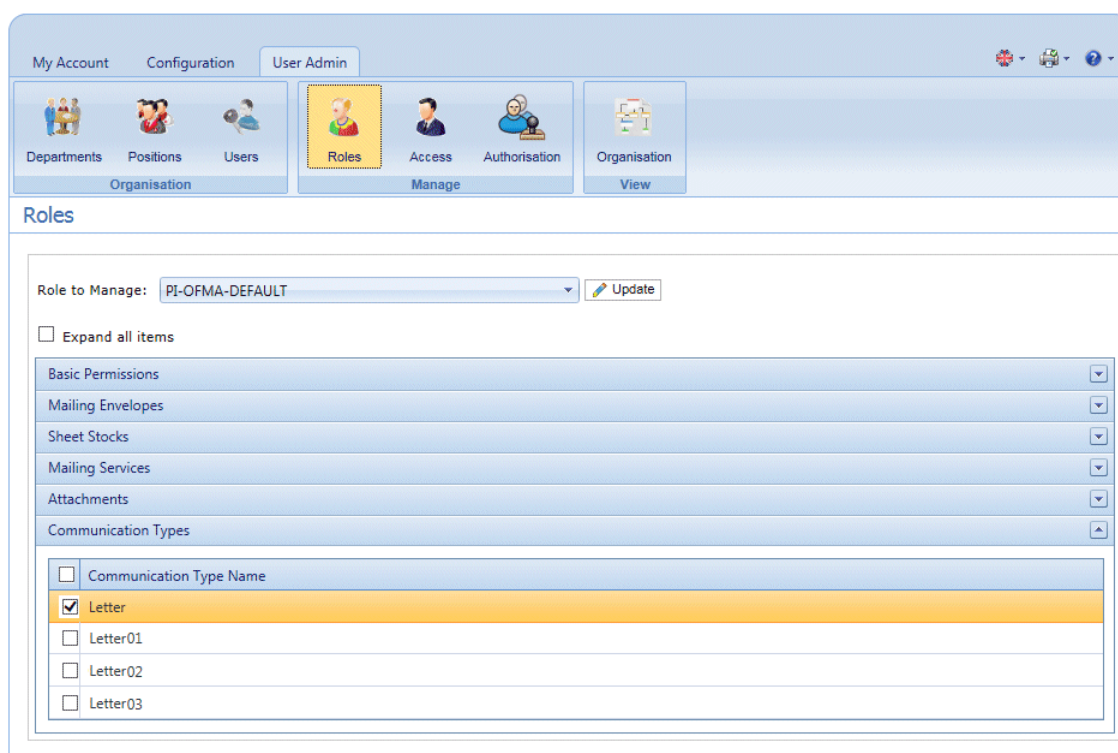
See [Adding Communication Types](#) on page 57 for descriptions of the options to modify.

See [Enforcing options](#) on page 55.

**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 68

## 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.

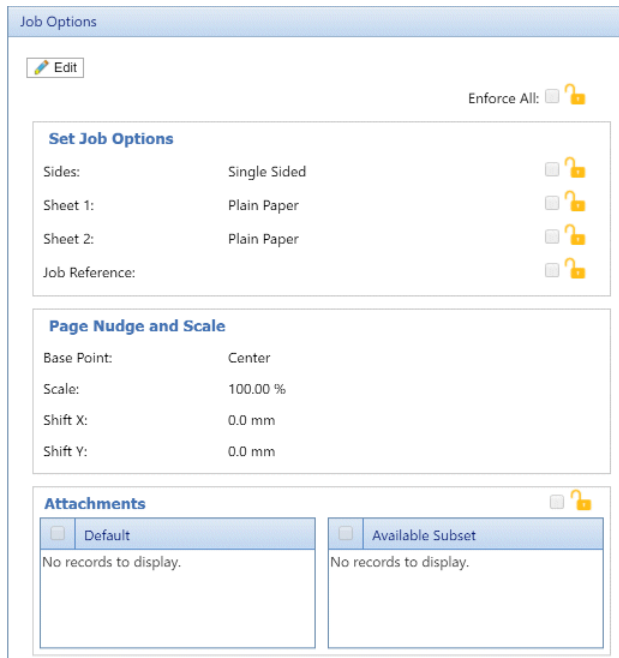
To enforce one or all options, follow the procedure, below:

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	<input type="checkbox"/> 
Sheet 1:	Plain Paper	<input type="checkbox"/> 
Sheet 2:	Plain Paper	<input type="checkbox"/> 
Job Reference:		<input type="checkbox"/> 

**Page Nudge and Scale**

Base Point:	Center
Scale:	100.00 %
Shift X:	0.0 mm
Shift Y:	0.0 mm

**Attachments**

<input type="checkbox"/> Default	<input type="checkbox"/> Available Subset
No records to display.	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 

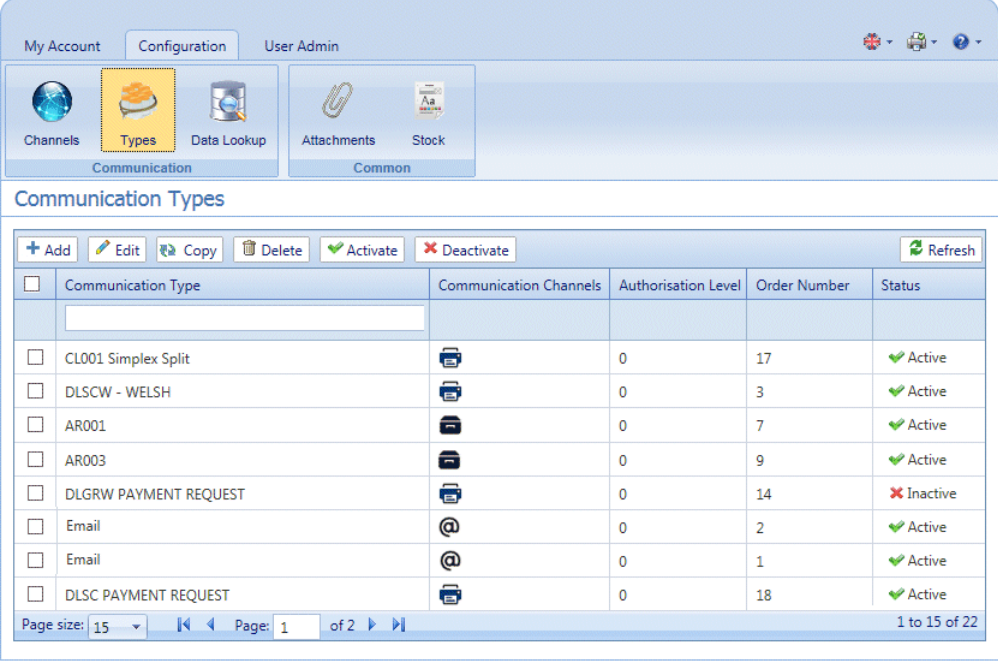
4. Click **Edit**.
5. Place a check mark in the boxes adjacent to the options you wish to enforce or click **Enforce All**.
6. Click **Update** in **Job Options** and in **Edit Communication Type**.

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

## 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:



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:

- 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 63
  - [Moving items](#) on page 64
  - [Extracting fields](#) on page 66

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

See [Enforcing options](#) on page 55.

**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 Print Manager Administrator Guide. The 'User Admin' tab is selected at the top. Below the navigation bar, the 'Roles' tool is highlighted. The 'Role to Manage' dropdown is set to 'PI-OFMA-DEFAULT'. The 'Expand all items' checkbox is unchecked. The 'Communication Types' section is expanded, showing a table with columns for 'Communication Type Name' and 'Status'. The 'Letter' type is selected with a checkmark, while 'Letter01', 'Letter02', and 'Letter03' are not.

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 68



## 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:

Y = distance from  
TOP (mm)  
+  
Height of word (mm)

X = distance from  
LHS (mm)  
+  
Width of word (mm)



Use these measurements when adding Search Criteria during **Adding Communication Types**.

## 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 57. 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 57 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 57. 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.

Move Items

<input type="checkbox"/>	Order	Action	Side #	Top Left X	Top Left Y	Width	Height	New Top Left X	New Top Left Y	Copy to Cover Page			
Action:		Move											
*Side #:		<input type="text"/>											
*Top Left X:		<input type="text"/> in											
*Top Left Y:		<input type="text"/> in											
*Width:		<input type="text"/> in											
*Height:		<input type="text"/> in											
*New Top Left X:		<input type="text"/> in											
*New Top Left Y:		<input type="text"/> in											
Copy to Cover Page:		<input type="checkbox"/>											
<input type="button" value="+ Add"/>		<input type="button" value="Cancel"/>											
No records to display.													
Page size:		15		<input type="button" value="Previous"/>		<input type="button" value="First"/>		Page: 1		<input type="button" value="Last"/>		<input type="button" value="Next"/>	

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 57 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 57. 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 67.
  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 67.

**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 57. 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

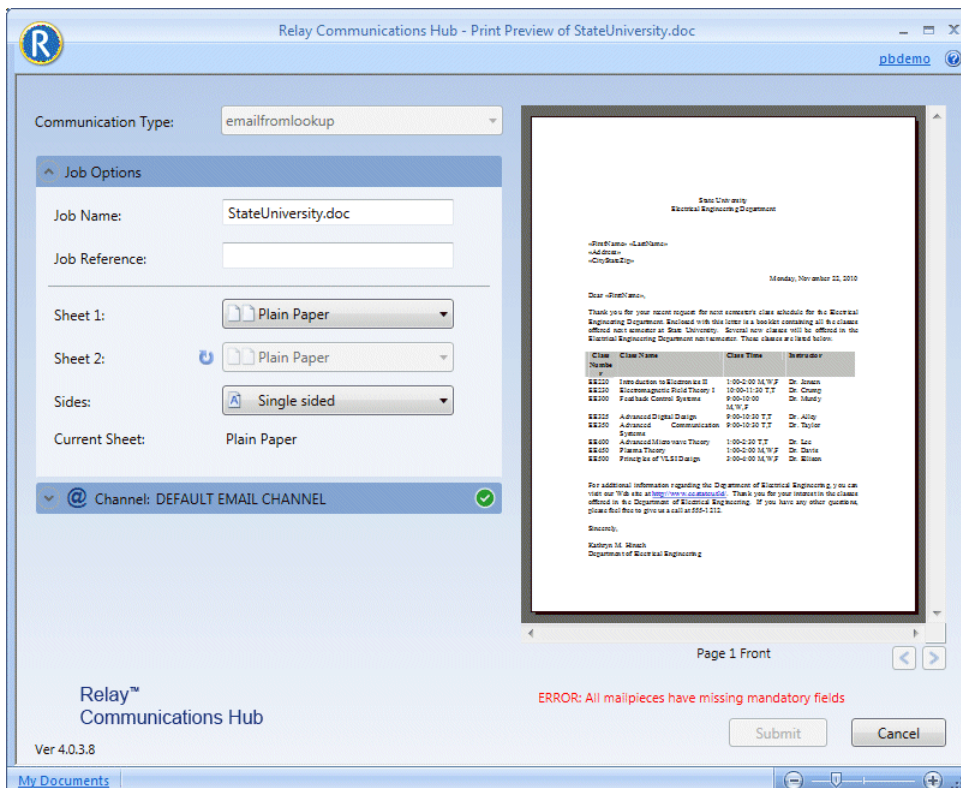
- To extract data from the job, you must define the field to be extracted, this is described in [Extracting fields](#) on page 66. Once you have extracted the fields, type the name of the field you wish to use enclosed in double square brackets, for example, `[[Job Name]]`. You may use any number of 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 57 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.

# 12 - Getting Started with Print Manager

The Print Manager provides all the tools required for performing the administration of your Relay Communications Hub. You are able to view reports on completed jobs by all users and by downloading these reports you can filter and sort the data as you wish.

- Manage user access
- Invite others to use Relay Communications Hub
- Edit your profile

The procedures described in the following sections are all performed on the Relay Communications Hub website:

- [Defining Your Organization](#) on page 15
- [Managing Roles](#) on page 24
- [Defining Access Pools](#) on page 29
- [Viewing Your Organization](#) on page 37
- [Configuring Relay Communications Hub](#) on page 40
- [Managing Attachments](#) on page 43
- [Managing Sheet Stock](#) on page 47
- [Managing Communication Types](#) on page 52

## In this section

## Signing in to the Relay Communications Hub

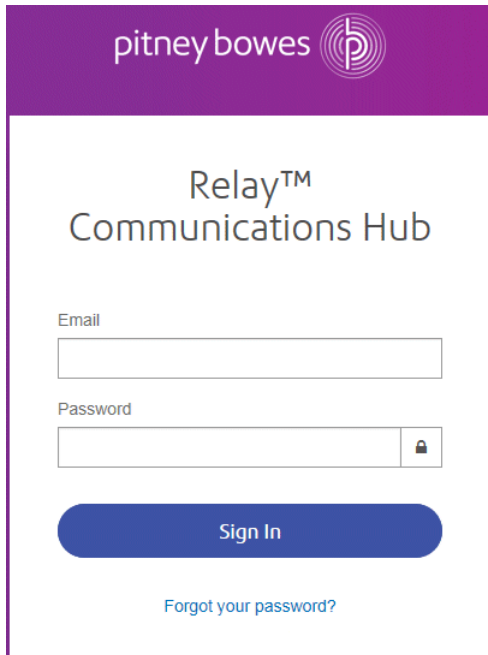
To begin, open your browser:

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.

**Note:**

- After six incorrect login attempts you are locked out of the Relay Communications Hub. Use the **Forgot your password?** on page 72 facility to reset your sign in credentials.
- 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 73.

3. Click **Sign in**.

The **My Print Streams** page of the Relay Communications Hub is then displayed.

Print Streams

View Released Print Streams

Bundle	Jobs	Mail Pieces	Pages	Next Trigger ⓘ	Trigger Now
C5, Duplex, Black & White, A4, 2nd Class, No Insert	45	2459	9125	15:00pm 22/04/16 or 5,000 Mail Pieces <a>Edit</a> <a>View</a> 10,000 Pages	
C5, Duplex, Black & White, A4, 2nd Class, Insert 1, Insert 2, Very long name for Insert 3	78	4840	7393	15:00pm 24/04/16 or 5,000 Mail Pieces <a>Edit</a> <a>View</a> 10,000 Pages	
C5, Duplex, Black & White, A4, 2nd Class, Insert 3, Insert 4	0	0	0	No times defined or 0 Mail Pieces <a>Edit</a> <a>View</a> 10,000 Pages	
Other	0	0	0	No triggers defined <a>Edit</a>	
All Print Streams	123	7662	16881		

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:

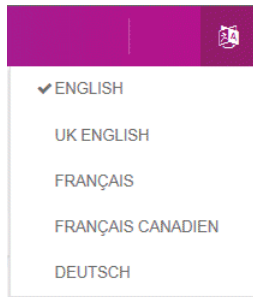
Help
Email
1-800-888-0286
Download Desktop Client

Click **Help** to open the Pitney Bowes website from where you can download this guide.

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.

# 13 - Viewing Job Reports

**Job Reports** gives you access to the jobs you have submitted. This is opened by clicking **Job Reports** in the Relay Communications Hub web client. 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 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

If you are 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

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Job Reports	75
Finding the jobs you wish to see	77
Email Deliverability report	80
Viewing a breakdown of Export Undelivered	81
Removing your Job	83

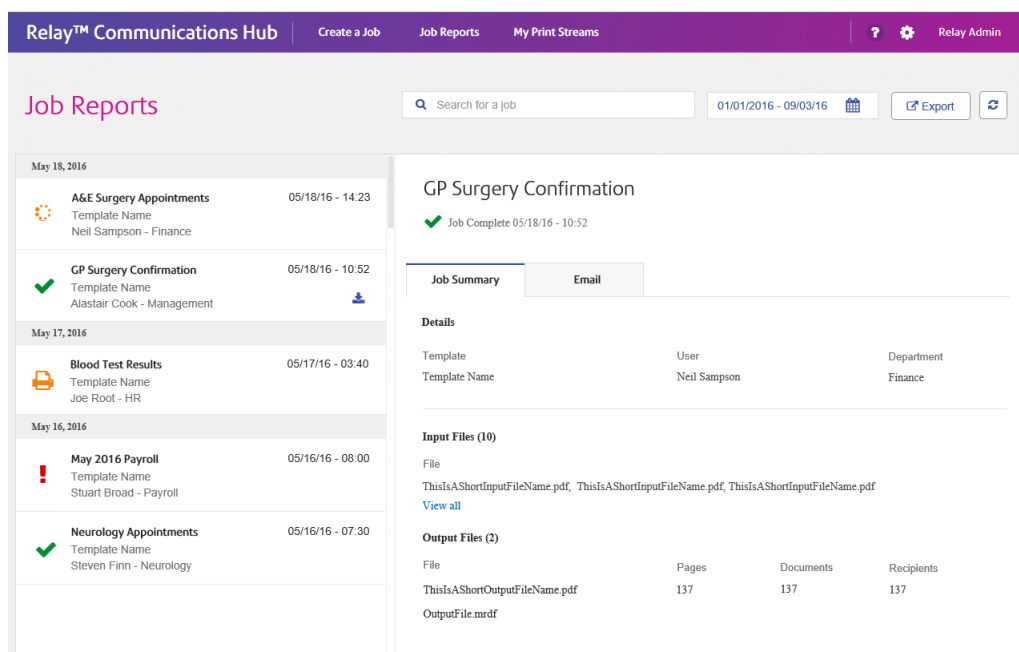
## Job Reports

**Job Reports** lets you view a list of the jobs you have submitted for printing. Administrators are able to see the jobs of all the users for whom they are responsible, in which case the user name is also given.

Immediately after uploading a job it is shown as processing; 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 screenshot shows the 'Relay™ Communications Hub' interface. The top navigation bar includes 'Create a Job', 'Job Reports', and 'My Print Streams'. The 'Job Reports' section is active, displaying a list of jobs on the left and a detailed view of a selected job on the right.

**Job Reports List (Left Panel):**

Date	Job Name	Template Name	User	Department	Status	Time
May 18, 2016	A&E Surgery Appointments	Neil Sampson - Finance			Processing	05/18/16 - 14:23
May 18, 2016	GP Surgery Confirmation	Alastair Cook - Management			Completed	05/18/16 - 10:52
May 17, 2016	Blood Test Results	Joe Root - HR			Processing	05/17/16 - 03:40
May 16, 2016	May 2016 Payroll	Stuart Broad - Payroll			Processing	05/16/16 - 08:00
May 16, 2016	Neurology Appointments	Steven Finn - Neurology			Completed	05/16/16 - 07:30

**Job Summary (Right Panel):**

**GP Surgery Confirmation**  
 ✓ Job Complete 05/18/16 - 10:52

**Job Summary** | **Email**

**Details**

Template	User	Department
Template Name	Neil Sampson	Finance

**Input Files (10)**

File: ThisIsAShortInputFileName.pdf, ThisIsAShortInputFileName.pdf, ThisIsAShortInputFileName.pdf  
[View all](#)

**Output Files (2)**

File	Pages	Documents	Recipients
ThisIsAShortOutputFileName.pdf	137	137	137
OutputFile.mrd			

The left-hand panel gives a scrollable list of jobs in the order in which they were submitted, newest to oldest.

If you have in-house print facilities, that is, if your jobs are printed and mailed from a centralized print room, 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 has completed when it has been uploaded and printed and/or emailed and/or archived. For all jobs printed by your central print room, this status is updated by the Print Room operator, that is, the operator confirms the job has been printed.

! Job error. Speak with your Print Room Operator.

**Note:** For all jobs printed by your central print room, the status is updated by the Print Room Operator responsible for your job. Your job is displayed as 🔄 until it has been marked as otherwise by the Print Room Operator.

If you do use a third-party print facility rather than an in-house print room, the status of your job can be one of the following:

🔄 Job is processing. This means that your job is uploading to Relay Communications Hub.


✅ Job uploaded now is now available for download.

! Job error.

## 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 the job to open its summary.

All jobs have a summary, regardless of their status. An example is shown next:



### SalesDemo\_JM\_0330-0916

Template: Custom Sales Demo

Your output file is ready for download.

Job Summary

Email

Input File	Status	Date Completed
SalesDemo_JM_0330-0916.pdf	✅ Complete	3/30/16 2:16 PM

	Pages	Documents	Recipients
Output	0	0	0

The information given in the Job Summary is not the same for all statuses.



## Finding the jobs you wish to see

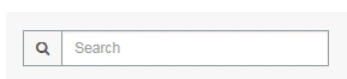
The job filter has two areas which allow you to find only the jobs you wish to see, both are described in greater detail in this section.


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:

A screenshot of a search box. It consists of a small square icon with a magnifying glass inside, followed by a rectangular text input field. The word "Search" is written in a light gray font inside the input field.

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.

### Filter jobs by date

You can filter the jobs by a predefined period or by a date range you define yourself. To filter the a job list, follow these steps:

1. From within the **Job Reports** page, at the top, click in the date range, this is shown, next, by default the date range shown is the last seven days.



This opens the following:

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 jobs displayed, you can export the information shown as a CSV file. This report gives details of all jobs sent within that time and is particularly useful if you wish to report on jobs submitted over long periods. You can create reports on all jobs submitted by all users. 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 

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 be used as required.

## Exported report fields

### Note:

The fields provided in the exported report are as follows:

- Mail Piece ID
- Print Stream ID
- Job Name
- Input file name
- Bundle Name
- User Name\*
- Department Name\*
- Job Submitters Email
- Date Submitted
- Print Channel Status
- Print Channel Status Date
- Print Send Date
- Print Job Option Send Date
- Simplex & Duplex
- Paper Size
- Sheet 1 Stock
- Sheet 2 Onward Stock
- Job Reference
- Simplex Pages/Duplex Sides
- Deleted By
- Deleted By (Email)
- Template / Communication Type
- Destination Address
- Color or Black & White
- Mailing Service
- Envelope
- Region Group

\* Denotes fields that are not available in reports downloaded by the user as they are able to report only on their own jobs

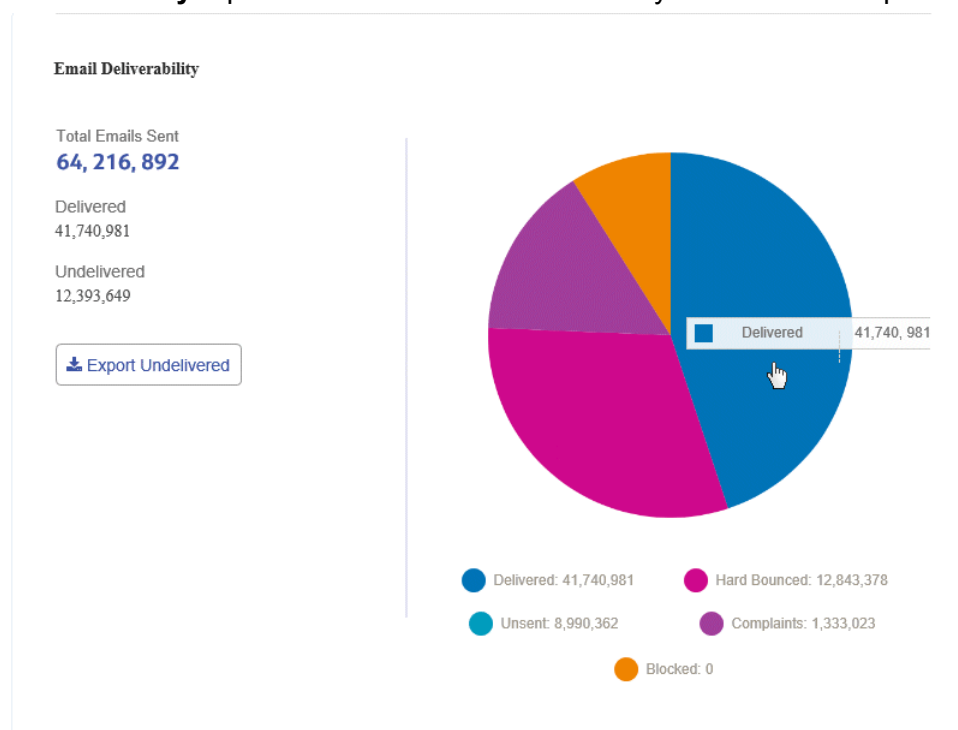
In addition, the following fields are provided for emailed jobs:

- Email Channel Status

- Email Channel Status Date
- Email Send Date
- Email Job Option Send Date
- From
- Sender
- Reply To
- Email To
- Email CC To
- Subject
- Body

## 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 of 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.

<b>In progress</b>	The email is still processing. This is updated as the status of the emails change.
<b>Hard bounce</b>	The email is not delivered because the email address is not a valid or does not exist.
<b>Blocked</b>	The email is not delivered because the recipient has actively blocked emails from your sender address.
<b>Complaint</b>	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 be 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:



## SALESDEMO\_test

Template: Email-Salesdemo

Your output file is ready for download.


[Download Output Files](#)

[Job Summary](#)
[Email](#)

14 Sent
[Export Undelivered](#)
[▼ All ▼](#)

Email Address ↕	Input File ↕	Date/Time ▲	Status
s.ward@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:07	Complete
r.amanses@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:07	Complete
c.plain@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:07	Complaints
a.mazaint@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:07	Complaints
d.mann@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:08	Blocked
m.wallera@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:08	Complete
n.shina@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:09	Complete
ramonesolino@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:09	Complete
nessley.ell@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:09	Complete
phineas.b@pb.com	w7/SALESDEMO.pdf	4/12/16 - 09:09	Complete

[^ Back to Top](#)

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 80.

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.

## Removing your Job


**Note:** This function is only available if you are using a third-party print facility rather than a centralized print room to process your jobs. If you are using a centralized print room to process your jobs The Print Room Operator deletes completed jobs.

Once you have downloaded your job and it is no longer required, you may remove it from Relay Communications Hub.


- Note:**
- You may delete any job while it is processing, that is, it is annotated with a 
  - Where more than one document is associated with a job, all of the documents for the job are removed
  - Deleting in both the job list and the **Job Summary** are disabled until the job is complete

We recommend that all downloaded files are removed to avoid confusion in the future.

To remove your files follow the procedure, below:

1. Ensure you are in the **Job Reports** page.
2. Click  to ensure you have the most up to date information.
3. Select the required job from the left-hand panel.

This opens the **Job Summary** in the right-hand panel.


4. Either:
  - Click  next to the job name in the job list, or
  - Click **Delete Job** in the **Job Summary**.
5. You are prompted to confirm the removal. Click **OK**.

The file(s) is then removed from Relay Communications Hub. If you find that you need it again, you must upload it, as described in [Uploading your file](#).

# 14 - Managing User Access and Roles

**Warning:** The functions described in this section are currently ONLY available to users in the US and Canada. If you are using Relay Communications Hub anywhere else in the world, please see [Defining Your Organization](#) on page 15, [Managing Roles](#) on page 24 and the [Defining Access Pools](#) on page 29.

If you have an Administrator role or permissions you may have access to the **Application Settings** menu.

The **Application Setting** menu, available from the top right-hand of the page by clicking .

This menu has two options:

**User Access Management**, which provides the tools for managing access to Relay Communications Hub, including the following:

- Inviting new users
- Resetting passwords
- Editing user details
- Deleting users, thereby revoking their access to Relay Communications Hub
- Viewing Admin and User groups to see which users are in which group

In addition, you can view user information and sort the view by user by status.

**Role Management**, which provides the means for assigning roles to users. The roles are described in [Relay Communications Hub roles](#) on page 9. Multiple roles can be assigned. If a user has no role assigned they automatically default to the User role. Access to Relay Communications Hub is based on the assigned roles, details can be found in [Permission matrix](#) on page 94.



In this section

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## Viewing users

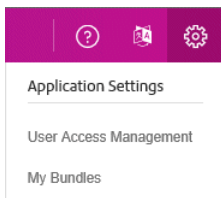
There are four roles:

- Users
- Operators
- Chief Operators
- Administrators

These are described in greater detail in [Relay Communications Hub roles](#) on page 9.

To view current Relay Communications Hub users:

1. In the top right corner of Relay Communications Hub banner click  to open the **Applications Settings** menu, shown next:



2. From the menu select **User Access Management**.

The following page is opened:

## Users

Users

Roles & Permissions

Invite

All Users ▾
 

Search

	User	Email	Role	Status	
	Relay Admin	hand120@pb.com	Admin	Active	
	Bob Lap	robert@mail.com	Admin	Active	
	A Chrome	4hfryb@mail.com	Admin	Active	
	AUser	ashuto@mail.com	User	Active	
	SoLo DarkKnight	dh4hx01@mail.com	Admin	Active	
	Sure Kar	ysj2x31@mail.com	User	Active	
	S Tagim	mvk2ku@mail.com	Admin	Active	
	SSham	q70e1y@mail.com	User	Active	
	Sachin Sha	sachin@mail.com	User	Active	
	Martin Kase	m8rtin@mail.com	Admin	Active	
	Dembi	35va9j@mail.com	User	Active	
	Admin	meena@mail.com	Admin	Active	

## Searching for users

To search for a user, follow these steps:

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

Search

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.

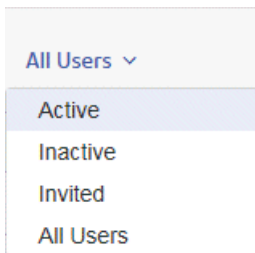
The next letter you type displays all users with the two letters consecutively in their name. For example, if you type "me", all names containing these letters in consecutively are displayed. Continue typing to narrow your search.

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.

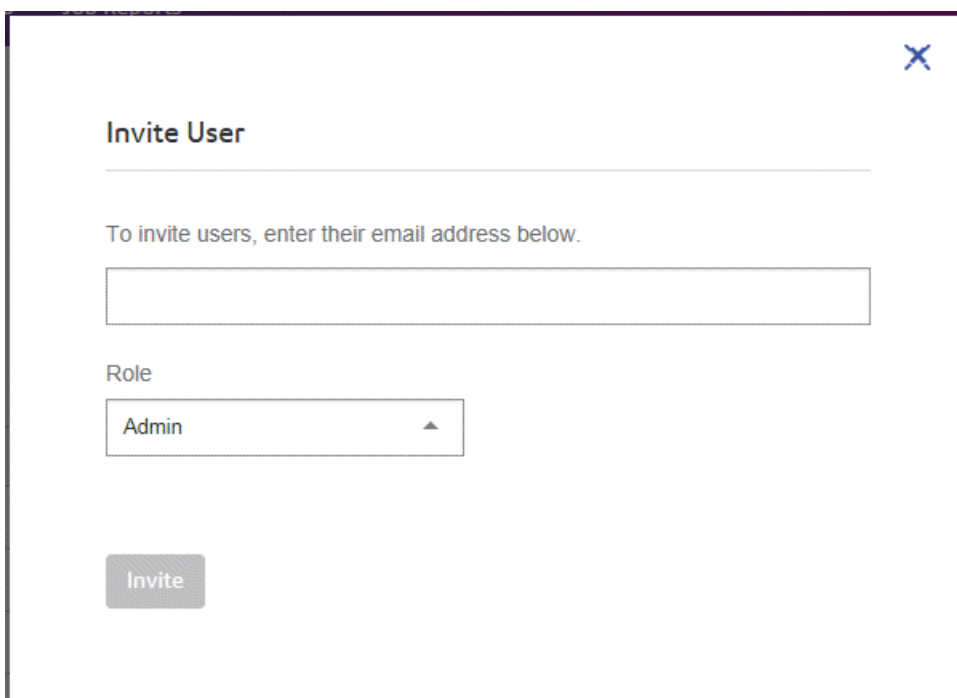
All users with the selected status are displayed.

## Inviting users

To invite users to join the Relay Communications Hub, follow the steps next.

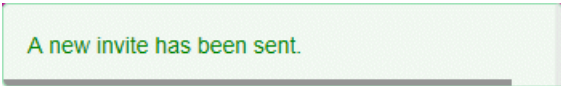
1. From within the **User** tab click in the **Invite**.

The following is displayed:

A screenshot of a modal dialog box titled 'Invite User' with a close button (X) in the top right corner. Inside the dialog, there is a text prompt 'To invite users, enter their email address below.' followed by a text input field. Below the input field is a label 'Role' and a dropdown menu currently showing 'Admin'. At the bottom left of the dialog is a button labeled 'Invite'.

2. Type in the email addresses of those you wish to invite. Separate multiple addresses with a semicolon.
3. Select a **Role** for the new users, one of the following:
  - **Admin** for administrators
  - **User** for job creators
  - **Operator** for print room operators
  - **Operator 2** for print room operators \*\*\*\*\*
4. Click **Invite**.

The following box appears in the top right corner of the page:



A new invite has been sent.

The invitee is then shown in the User table with a **Status** of **Invited** but with no **User** name.

They receive an email inviting them to sign in to Relay Communications Hub. When they sign in, their **User** name and password is set and their **Status** becomes **Active**.

## Sending a password reset email

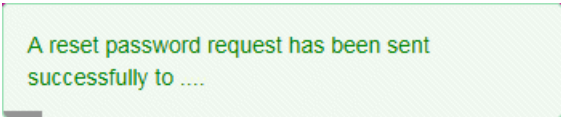
The **Reset password** facility sends an email to the selected user which contains a link from which they are able to reset their password.

You may send a reset password email to any user listed in the User tab, except yourself. For instructions on resetting your own password see [Changing your password](#) on page 100.

To send a reset password email, follow these steps:

1. From within the **User** tab click ⚙ for the required user.
2. From the resultant menu click **Reset password**.

The email is sent to the user and the following is displayed in the top right of the page:

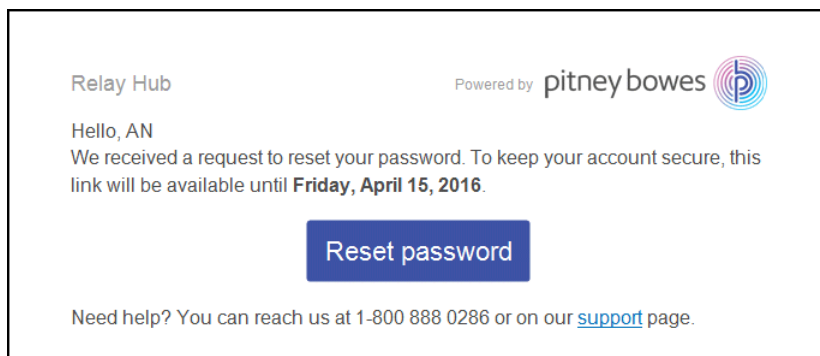


A reset password request has been sent successfully to ....

### Resetting your password

You may reset your password either from an email requesting the change or as described in [Changing your password](#) on page 100.

An example of the email requesting that you reset your password, is shown below:



To reset a password from an email, follow these steps:

1. From within the email click **Reset password**.

This opens the following window:


2. Type in your **New password**.
3. Type the same password in **Re-enter new password**.
4. Click **OK**.

Your password is reset and you are signed in to Relay Communications Hub.

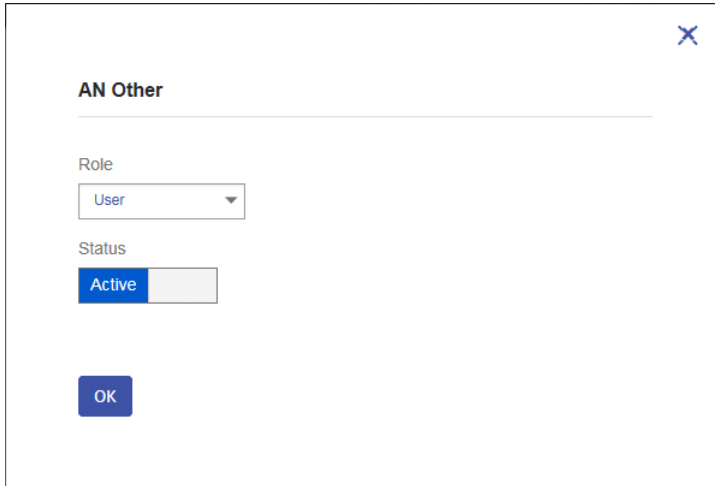
## Editing a user's details



You can edit a user's details from the **User** tab. This facility allows you to edit the Role and the Status of the required user.

To edit a user's details, follow these steps:

1. From within the **User** tab click  for the required user.
2. From the resultant menu click **Edit**.

The following is displayed:



3. If you wish to change the **Role** of the user, click  to display the list of available roles. Select the one required.
4. If you wish to change the **Status** of the user, click  to display the list of available status. Select the one required.
5. When you have made the required change(s) click **OK**


The changes are saved and the following is displayed in the top right of the page:

User has been updated successfully.

## Deleting a user

You can delete a user from Relay Communications Hub, thereby revoking their sign in credentials from the **User** tab.

To delete a user, follow these steps:


1. From within the **User** tab click  for the required user.
2. From the resultant menu click **Delete**.
3. In the **Delete User?** window click **Delete User** to confirm.

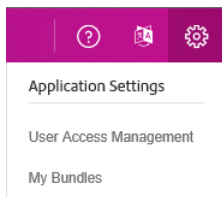
The user is removed from the **User** table and is no longer able to sign in to Relay Communications Hub.

User has been updated successfully.

## Viewing Roles & Permissions

To view current Relay Communications Hub Admin and User groups:

1. From within the Relay Communications Hub banner click  to open the **Applications Settings** menu, shown next:



2. From the menu select **User Access Management**.
3. Click the **Roles & Permissions** tab.

The following page is opened:



On opening this tab, the **Admin** user group is shown. The Admin users are listed under **Members** in the right-hand panel.

4. Click the required option in the left-hand panel, to show the members of that group.




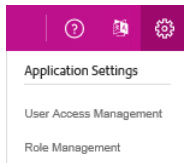
## Assigning roles

**Warning:** The functions described in this section are currently **ONLY** available to users in the US and Canada. Role Management for the rest of the world is achieved through **Managing Roles** on page 24.

The roles are described in **Relay Communications Hub roles** on page 9.

To manage roles for users if you are in the US and Canada, follow the procedure below:

1. In the top right corner of Relay Communications Hub page click  to open the **Applications Settings** menu, shown next:
















2. From the menu select **Role Management**.

The following page is opened:

### Role Management

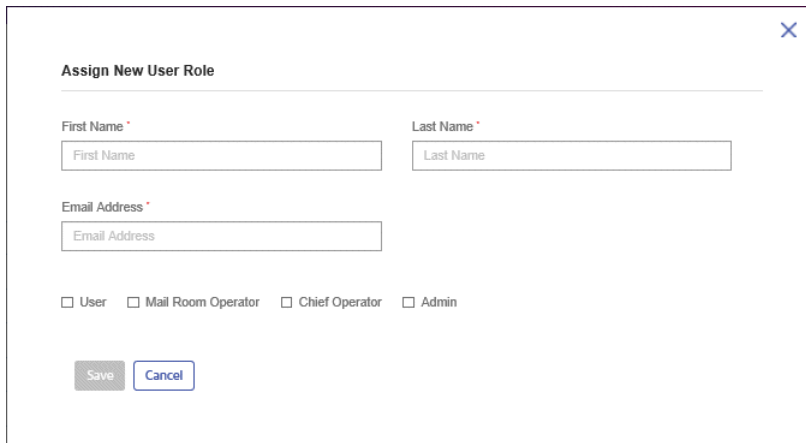
[Assign New User Role](#)

	First Name	Last Name	Email Address	Role(s)
	Admin	User	dd@mail.com	Admin, User, Operator, Chief Operator
	Jas	No	jas.no@mail.com	Chief Operator
	[pdfgo]	dfsfsf	akshi.dembi@mail.com	Chief Operator
	pulkit	anchalia	ancha.pul@mail.com	User
	Sanj	Sharma	sanj.sham@mail.com	Chief Operator
	sachin	sharma	sachinsharma@mail.com	User
	sank	boria	sank.boria@mail.com	User
	Smart	Cat	SmartCat@mail.com	Chief Operator
	So	Lo	so.lo@mail.com	Operator
	Service	User	su-10@mail.com	User
	Sugar	Heart	SHeart@mail.com	User, Operator
	Suresh	mar	suresh.mar@mail.com	Operator
	Relay	Admin	test@mail.com	Admin, User, Operator, Chief Operator
	vini	kali	vini.kali@mail.com	Admin, User, Operator, Chief Operator

This lists all current users and their roles. You can see from the table that multiple roles can be assigned.

### 3. Click **Assign New User Role**.

The following is displayed:



The screenshot shows a dialog box titled "Assign New User Role" with a close button (X) in the top right corner. Inside the dialog, there are three text input fields: "First Name" with a red asterisk, "Last Name" with a red asterisk, and "Email Address" with a red asterisk. Below these fields are four checkboxes: "User", "Mail Room Operator", "Chief Operator", and "Admin". At the bottom of the dialog are two buttons: "Save" and "Cancel".

4. Complete all the fields for the user to whom you are assigning the role. It is not necessary for a user to already exist on the system.

5. Select one or more roles.

6. Click **Save**.

If a user has no role assigned they automatically default to the User role. Access to Relay Communications Hub is based on the assigned roles, details can be found in [Permission matrix](#) on page 94.

## Permission matrix

The permissions matrix shows which roles have access to which parts of Relay Communications Hub.

**Note:** Multiple roles can be assigned to the same person.

Green - Visible for role  
Red - Not Visible for role

	In House Print & Mail Facility				No In House Print & Mail Facility	
Navigation Item	User	Administrator	Operator	Chief Operator	User	Administrator
Create a Job	Landing Page	Landing Page			Landing Page	Landing Page
Job Reports						
Print Streams			Landing Page	Landing Page	N/A	N/A
Customer Service						
Customer Service   Email						
Customer Service   Download Desktop Client						
Settings   My Bundles					N/A	N/A
Settings   User Access Management *						
Language						
<User Name>						
<User Name>   User Profile *						
<User Name>   Payments *						
<User Name>   Sign Out						

\* These functions are only available in the US and Canada.

**<User Name>** Indicates the name of the signed in user.

**Landing Page** The page displayed once the user has signed in.

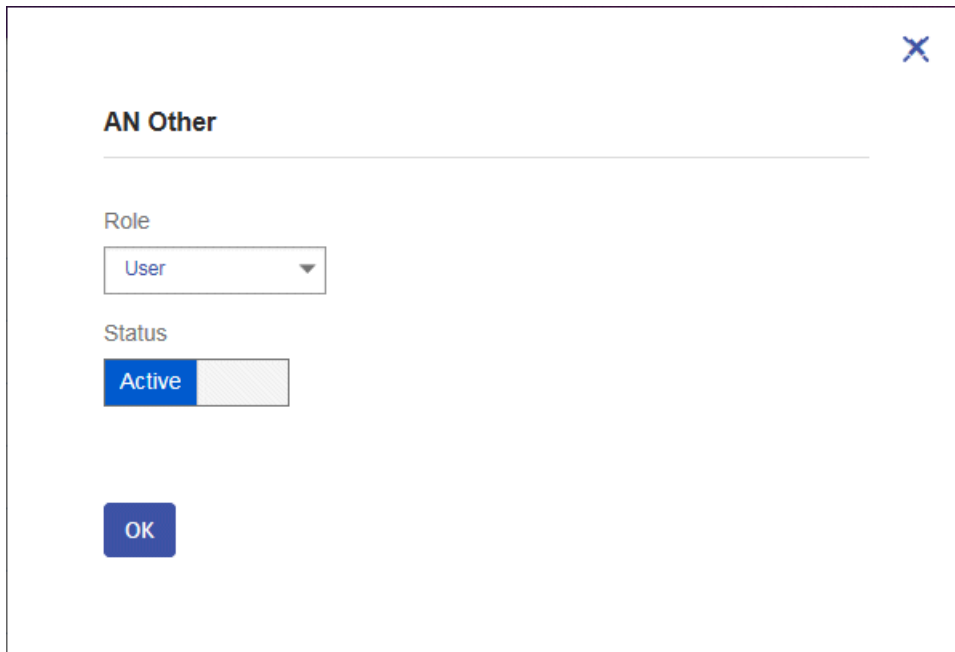
## Editing role assignments

**Note:** Only the **Users** appearing in this tables can be edited.

The process for editing role assignments is much the same as for assigning new roles, the information shown in the page is different for each.

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

1. From within **Role Management** click



The screenshot shows a dialog box with a title bar containing a close button (X). The dialog is titled "AN Other". Below the title, there is a "Role" dropdown menu currently set to "User". Below that is a "Status" section with a toggle switch; the "Active" option is selected and highlighted in blue. At the bottom of the dialog is a blue "OK" button.

for the required user.

2. A dialog similar to that for assigning new roles is opened. Make the changed required.
3. Click **Save**.

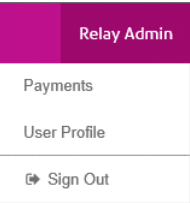
The new information is now shown in the table.

# 15 - Administrrating Relay Communications Hub

**Warning:** The functions described in this section are currently ONLY available in the US and Canada.

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:

- Adding money to your Relay Communications Hub account
- Viewing and changing you user profile
- Signing out of Relay Communications Hub

## In this section

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Editing your profile (Rest of World)	101
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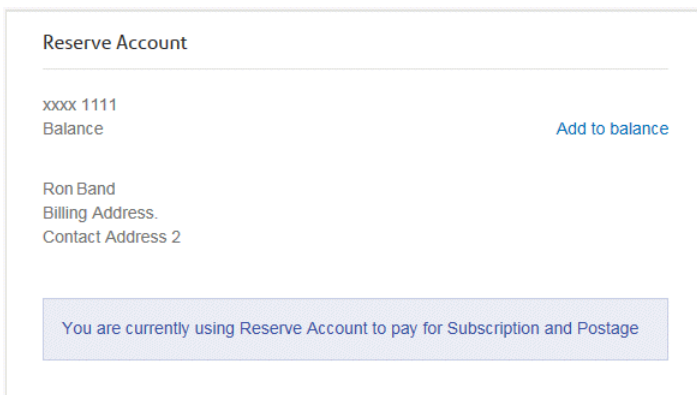
## Adding money to your account

You can add money to your Relay Communications Hub account from the payment options specified when you set up your account on your local Pitney Bowes website.

To add money to your account balance:

1. Click your user name in the header and select **Payments** from the menu.

The following is displayed:



Reserve Account

---

xxxx 1111  
Balance [Add to balance](#)

Ron Band  
Billing Address.  
Contact Address 2

You are currently using Reserve Account to pay for Subscription and Postage

2. Click **Add to balance**.

This opens the Pitney Bowes website.

3. Sign in to your account and make a payment.

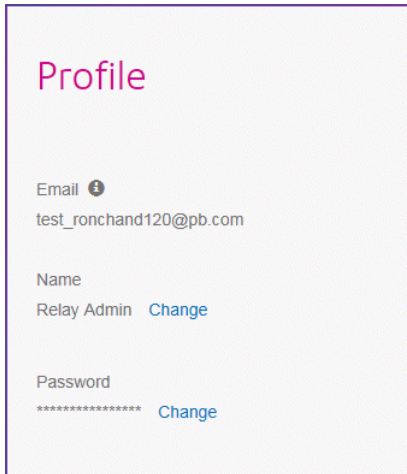
When you are returned to the Relay Communications Hub, the above page is displayed, showing the updated balance.

## Editing your profile (US and Canada)

**Warning:** The functions described in this section are currently **ONLY** available in the US and Canada.

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

The following is displayed:



**Profile**

Email ⓘ  
test\_ronchand120@pb.com

Name  
Relay Admin [Change](#)

Password  
\*\*\*\*\* [Change](#)

Your email address, user name and password are given.

[Changing your user name](#) on page 99 and [Changing your password](#) on page 100 are covered next.

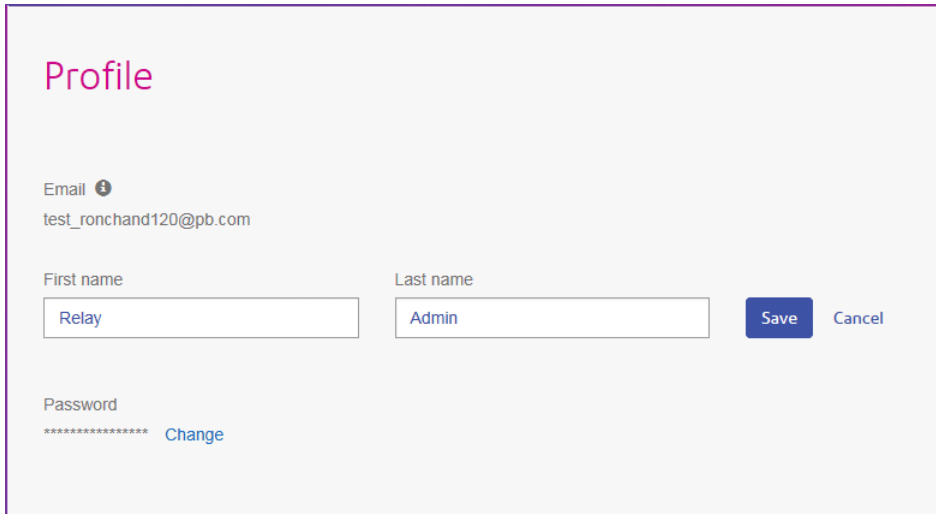
## Changing your user name

**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.

To change your user name:

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

The following is opened:



**Profile**

Email ⓘ  
test\_ronchand120@pb.com

First name

Last name

Password  
\*\*\*\*\* [Change](#)

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

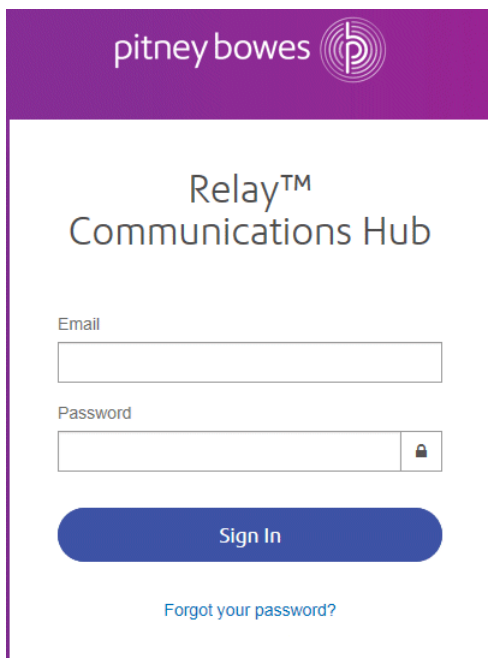
To change your password:

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

**Europe:** <https://client.relayhub.eu.pitneybowes.com/>

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

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



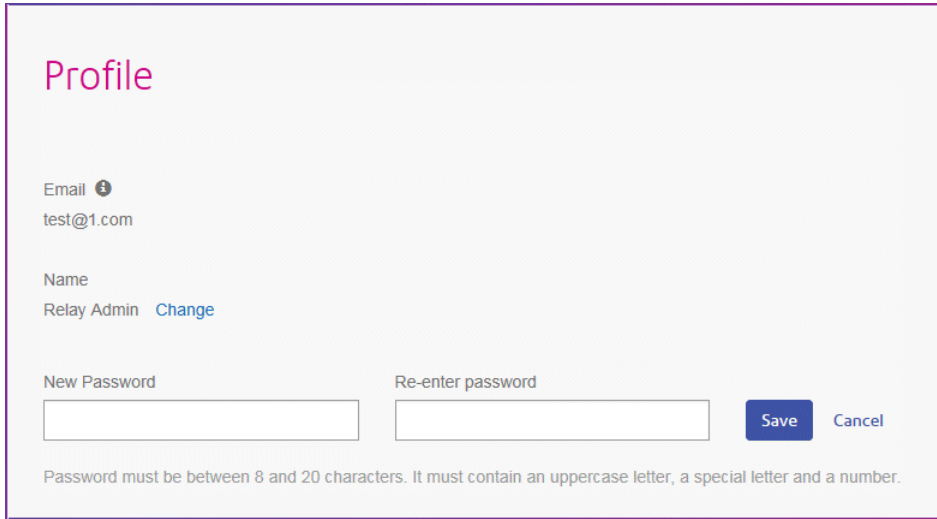
2. Type in your **Email** and **Password**.

**Note:** After six incorrect sign in attempts you are locked out of the Relay Communications Hub. Use the **Forgotten your password** facility to reset your sign in credentials.

3. Click **Sign in**.
4. In the top right corner of the Relay Communications Hub website click on your user name.
5. From the resultant menu select **User Profile**.
6. From within the **Profile** page click **Change** next to your password.



The following is opened:



7. Type in a new value for **New Password**.
8. Type in the same new value for **Re-enter password**.
9. Click **Save**.

Once you click **Save** your password is changed. You will need to use it the next time you sign in to Relay Communications Hub..

## Editing your profile (Rest of World)

**Warning:** The functions described in this section are currently NOT available in the US and Canada.

First, you need to [sign in](#) to the Relay Communications Hub user website.

[Changing your password](#) on page 102 is covered next. To change your user name, you need to speak to your Administrator.

## Signing in to Relay Communication Hub

The Relay Communications Hub Administrator in your organization will provide you with credentials with which you can sign into both the My documents website and the Printer Driver.

To sign in to follow the procedure below:

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

<https://relayhub.eu.pitneybowes.com/>

This opens the **My Documents** website in a new tab. The **Sign in** page is displayed.



The image shows a sign-in form for the 'My Documents' website. On the left is an icon of two keys, one gold and one silver. To the right of the icon are two input fields: the first is labeled '\* Email or Username:' and the second is labeled '\* Password:'. Below these fields is a 'Sign In' button. Underneath the button is a link that says 'Forgotten your password?'.

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 five 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**.

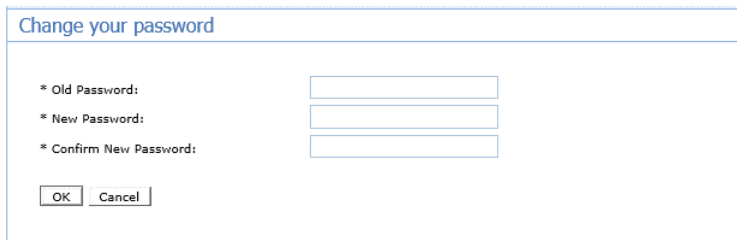
The **Relay Communication Hub user web site** is then displayed.

## Changing your password

To change your password:

1. Click on your user name in the top right corner of the page.

The following is opened:



The image shows a 'Change your password' form. It has a title bar that says 'Change your password'. Inside the form, there are three input fields: the first is labeled '\* Old Password:', the second is labeled '\* New Password:', and the third is labeled '\* Confirm New Password:'. Below these fields are two buttons: 'OK' and 'Cancel'.

2. Type in a new value for **New Password**.
3. Type in the same new value for **Re-enter password**.
4. Click **Save**.

Once you click **Save** your password is changed. You will need to use it the next time you sign in to Relay Communications Hub.

## 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.

# 16 - CSV File Formats

The Import 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

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## 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.

- Company Name \*
- Department Name \*
- Reports to
- Department Name
- Address Line 1
- Address Line 2
- Address Line 3
- Town
- County
- Postal
- Code
- ISO3166
- Country Code
- Phone
- Email
- Last Name
- First Name
- User Email \*
- User Name \*
- Must Change Password \*

**Note:** • Mandatory fields are marked with a \*.

- The **Must Change Password** field requires a 0 where a password change is not required and a 1 where the user is required to change their password once they receive it.

# 17 - Predefined Roles

**Note:** If you are using Relay Communication Hub in the US or Canada, user roles and access are managed through the **Applications Setting** menu. [Assigning roles](#) on page 93.

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

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## 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	<p>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:</p> <ul style="list-style-type: none"> <li>• the Autosub Author in the ticket is an email address</li> <li>• the Autosub Author email address exists as a user in the system</li> </ul>

- 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 <b>Roles</b> 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-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.



# 18 - Glossary

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

## In this section

Terms and definitions

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## Terms and definitions

<b>Administrator</b>	The person responsible for the administration of Relay Communications Hub. These responsibilities include creating users, defining the organization hierarchy and specifying bundle criteria.
<b>Attachments</b>	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.
<b>Bundle</b>	<p>A bundle is 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:</p> <p>C5, Duplex, Black &amp; White, A4, 2nd Class, No Insert</p> <p>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.</p>
<b>Communication Channels</b>	Defines how Relay Communications Hub outputs the job. This can be one, all or any combination of Archive, Email and Print.
<b>Communication Types</b>	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.
<b>Concatenation</b>	The grouping of individual jobs into one print stream. Jobs are concatenated by bundle, a number of common attributes.
<b>Download</b>	The print stream is transferred from Relay Communications Hub on to the printer.
<b>Job</b>	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.
<b>Mailing Envelopes</b>	Envelopes in which printed mail pieces are inserted for mailing. These are usually defined by physical size.
<b>Mailing Services</b>	The service used to send printed mail pieces.
<b>Mail Piece</b>	A single letter to one recipient. Mail pieces are concatenated or mail merged into Jobs and then submitted to Relay Communications Hub by users.
<b>Operator</b>	The person creating triggers to automate printing of print streams in addition to manually triggering printing.
<b>Pre-Printed Inserts</b>	A physical published document inserted into the envelope with the mail piece at the time of printing.

<b>Print Stream</b>	A concatenation of individual jobs into 1 larger file for printing.
<b>Release</b>	The process of starting the download of the print stream from Relay Communications Hub on to the printer.
<b>Role</b>	A group of settings which define user permissions and access to parts of the user interface and facilities.
<b>Search Criteria</b>	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.
<b>Sheet Stock</b>	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.
<b>Side Assignment</b>	The side or sides on which the Sheet Shock appears.
<b>Trigger</b>	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.
<b>User</b>	The person submitting individual jobs to Relay Communications Hub for printing.

# 19 - More Information

## In this section

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## Technical Support

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](mailto:software.support@pb.com)

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<b>AMER:</b>	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
<b>APAC:</b>	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
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