

Relay Communications Hub

Version 2.0

User Administration Quick Start Guide

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1 - 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 7
- **Managing Roles** on page 16
- **Defining Access Pools** on page 22
- **Viewing Your Organization** on page 36
- **Configuring Relay Communications Hub**
- **Managing Attachments**
- **Managing Sheet Stock**
- **Managing Communication Types**

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**, **Assigning roles**.

In this section

Signing in to the user website

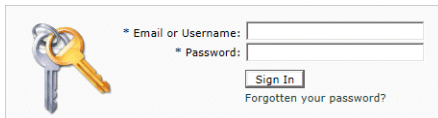
Pitney Bowes will provide you with Administrator credentials with which you can sign in, follow the procedure below:

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.



* Email or Username:

* Password:

[Forgotten your password?](#)

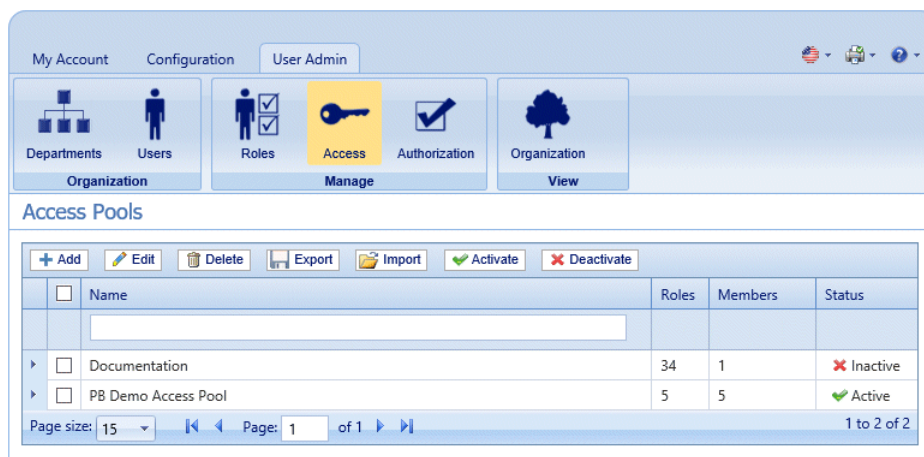
2. Type in your user credentials. By default this is your email address and a default password of "password".

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.

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.



The screenshot shows the 'User Admin' section of the application. The 'Access' tab is selected under the 'Manage' category. Below the navigation tabs, there is a table titled 'Access Pools'.

	Name	Roles	Members	Status
<input type="checkbox"/>	<input type="text"/>			
<input type="checkbox"/>	Documentation	34	1	✗ Inactive
<input type="checkbox"/>	PB Demo Access Pool	5	5	✔ Active

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

Changing your password

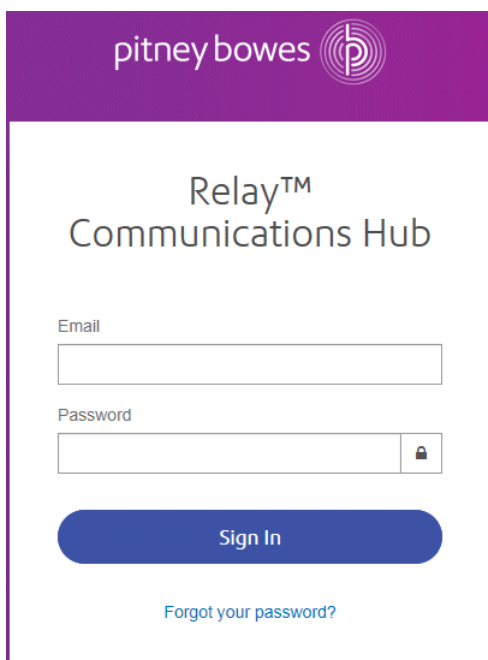
To change your password:

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:

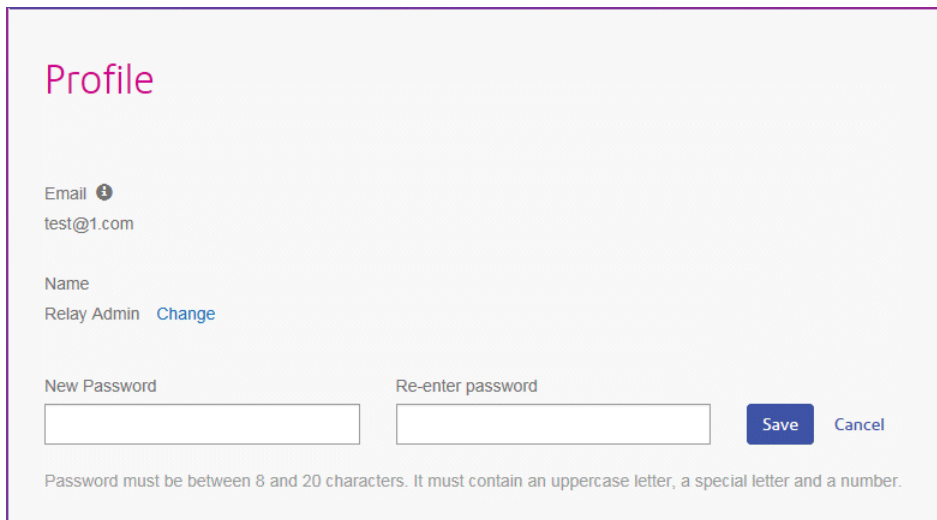


2. Type in your **Email** and **Password**.

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:



Profile

Email ⓘ
test@1.com

Name
Relay Admin [Change](#)

New Password

Re-enter password

[Save](#) [Cancel](#)

Password must be between 8 and 20 characters. It must contain an uppercase letter, a special letter and a number.

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..

2 - Defining Your Organization

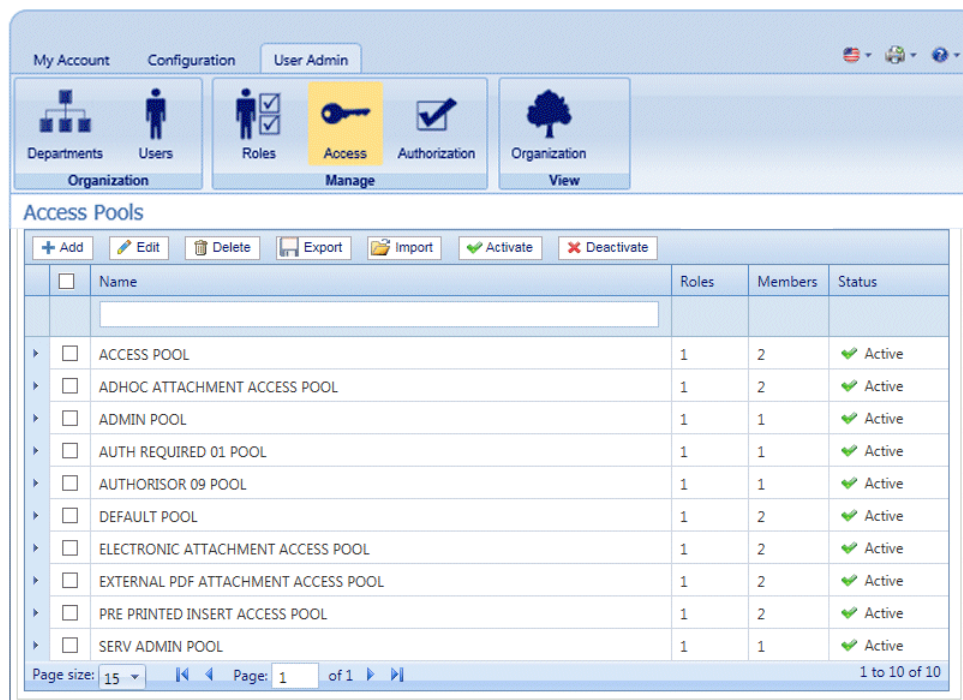
The **User Admin** tab provides all the tools required for defining your Relay Communications Hub users and hierarchy. You are able to create a structure for your organization by creating Departments, Roles and Users which are added to your **Organization Tree**. In addition, you can create Access and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

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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.

The screenshot shows the 'Users' page in the 'User Admin' tab. The page has a navigation bar with 'My Account', 'Configuration', and 'User Admin'. Below this is a ribbon with icons for 'Departments', 'Users', 'Roles', 'Access', 'Authorization', and 'Organization'. The 'Users' icon is highlighted. The main content area shows a table with the following columns: First Name, Last Name, User Name, User Email, and Department. There are input fields for each column. Above the table are buttons for '+ Add', 'Edit', 'Delete', and 'Refresh'. Below the table is a pagination bar showing 'Page size: 15', 'Page: 1 of 1', and '1 to 5 of 5'. At the bottom, there is a button for 'Email new user passwords'.

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**.

The screenshot shows a form for adding a new user. It has the following fields:

- *First Name: [text input]
- *Last Name: [text input]
- *User Name: [text input]
- *User Email: [text input]
- Department: dept (dropdown menu)

 At the bottom, there are two buttons: '+ Add' and 'Cancel'.

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.

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.

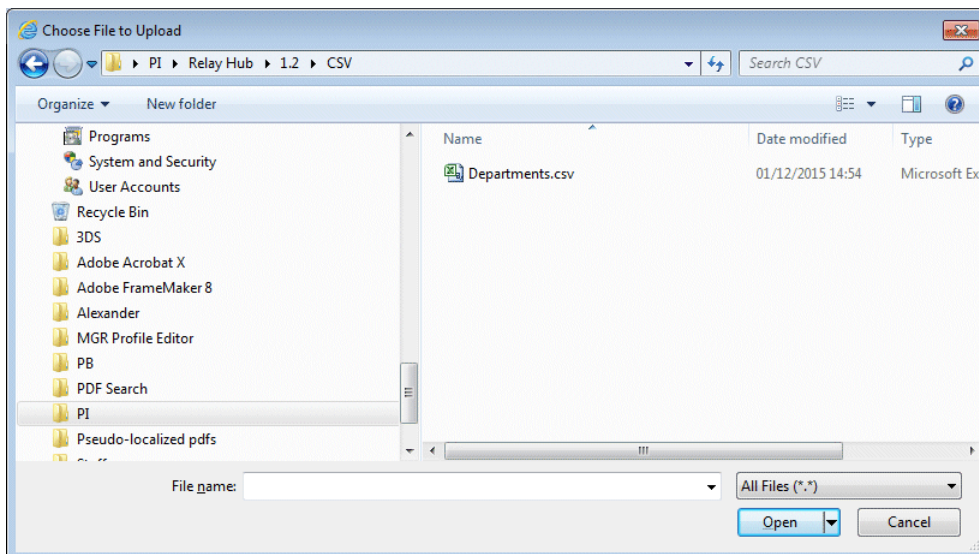
The fields required in the `csv` file are the same as the fields given in the table if you were to add elements manually, each user must appear on a separate line.

Refer to [CSV File Formats](#) on page 39 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**.

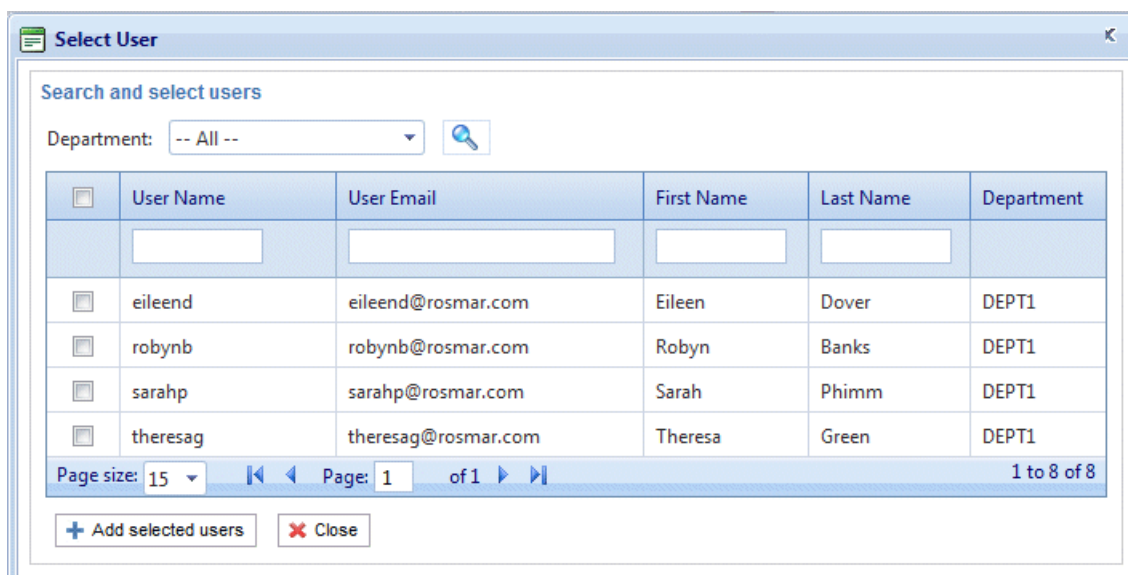
Warning:

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.

3 - 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 45 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.

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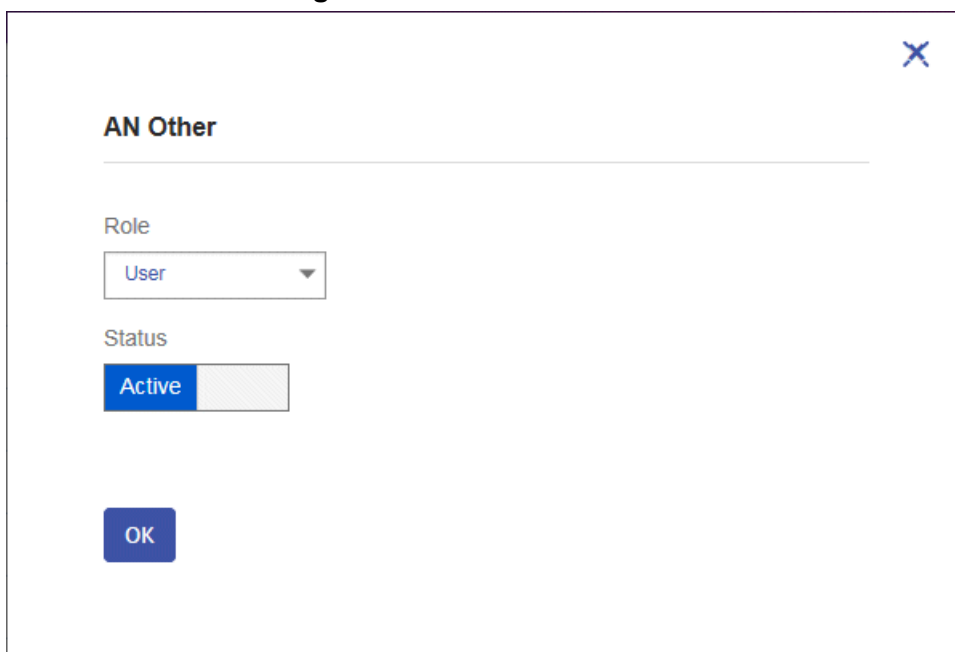
Editing role assignments

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



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.

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.



Sides	Colour
Single Sided: <input checked="" type="checkbox"/>	Black and White: <input checked="" type="checkbox"/>
Double Sided: <input checked="" type="checkbox"/>	Colour: <input checked="" type="checkbox"/>

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**.

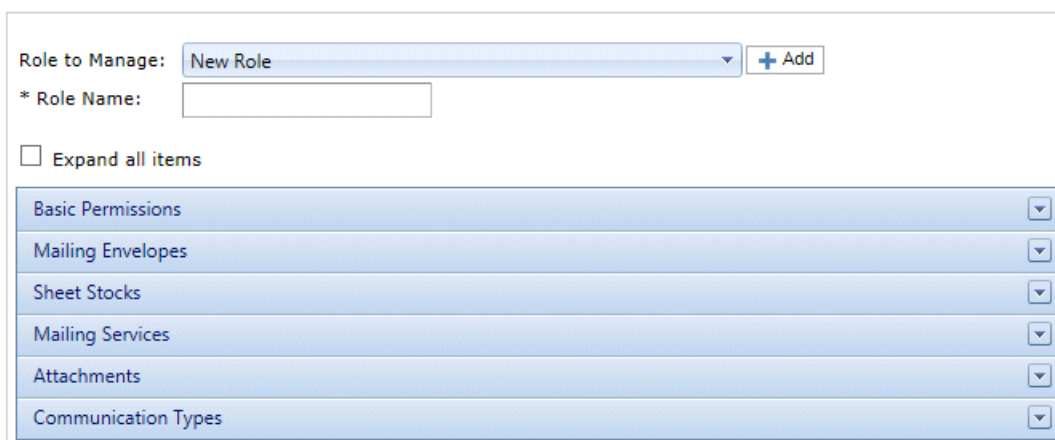
You can add permissions to a role at any time by selecting required items from the different categories and clicking **Update** to complete the operation.

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:

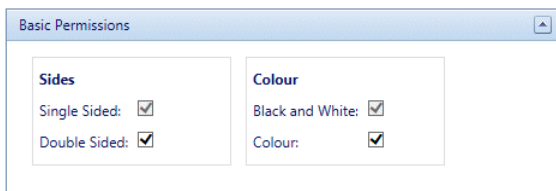
☐ Expand all items

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

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.

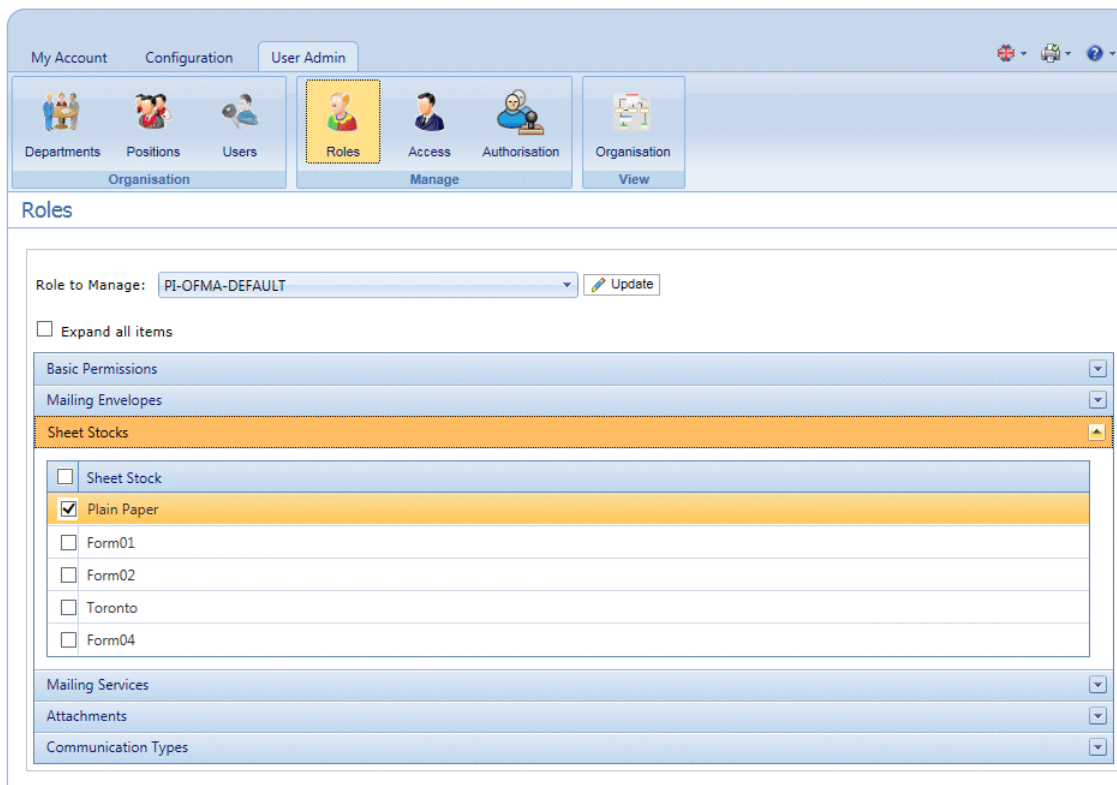
3. Select the new role's name from the **Roles to Manage**.
4. Click on the **Basic Permissions** box, shown below, to expand it.



Basic Permissions

Sides Single Sided: <input checked="" type="checkbox"/> Double Sided: <input checked="" type="checkbox"/>	Colour Black and White: <input checked="" type="checkbox"/> Colour: <input checked="" type="checkbox"/>
--	--

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



My Account Configuration **User Admin**

Departments Positions Users **Roles** Access Authorisation Organisation

Organisation Manage View

Roles

Role to Manage: PI-OFMA-DEFAULT

☐ Expand all items

Basic Permissions

Mailing Envelopes

Sheet Stocks

<input type="checkbox"/>	Sheet Stock
<input checked="" type="checkbox"/>	Plain Paper
<input type="checkbox"/>	Form01
<input type="checkbox"/>	Form02
<input type="checkbox"/>	Toronto
<input type="checkbox"/>	Form04

Mailing Services

Attachments

Communication Types

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.

4 - 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.

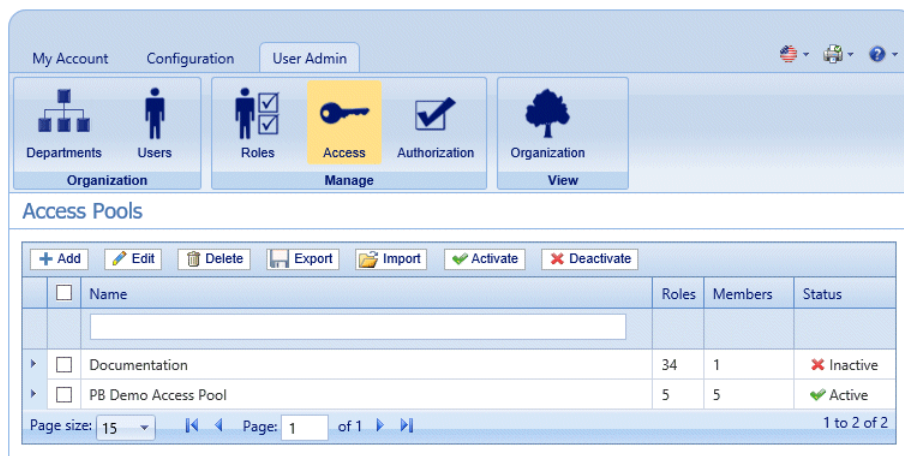
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Editing an Access Pool

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

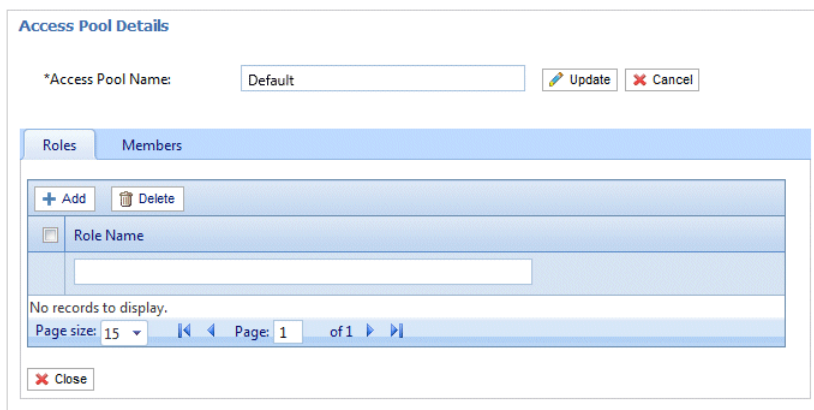
The **Access Pools** page is shown below:



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:

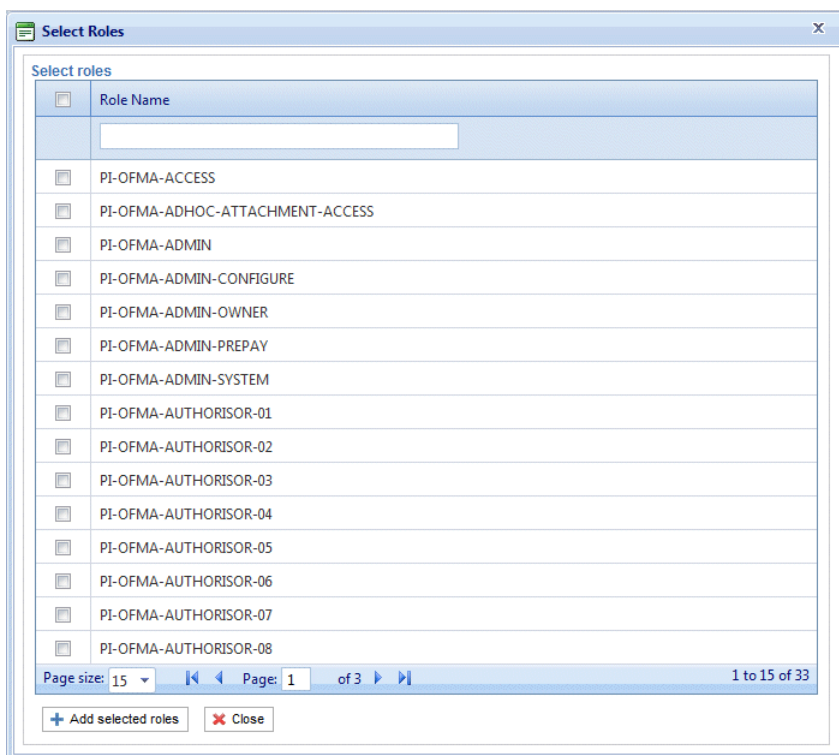


If you wish, you may amend the **Access Pool Name** by editing the text in the box and clicking **Update**.

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.

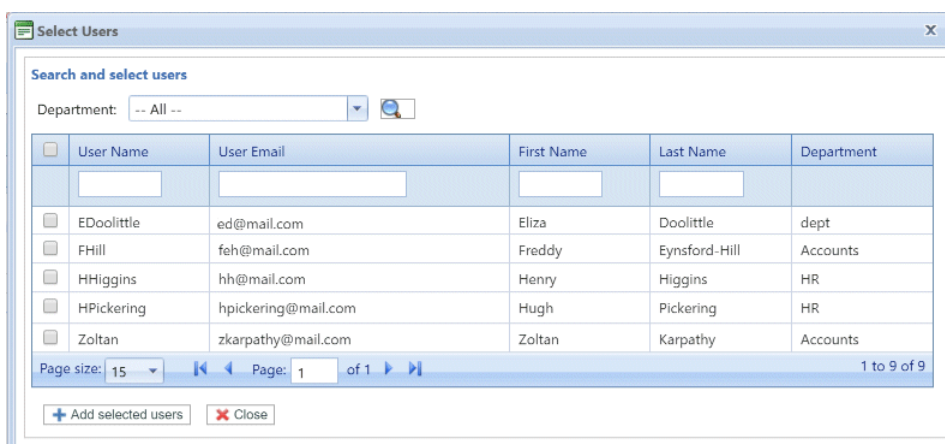
7. Click **Close** to return to the **Access Pools Details** page.

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.

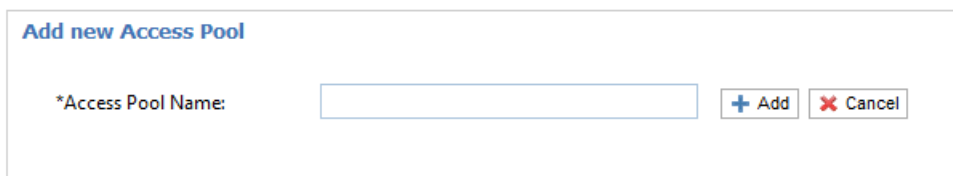
Note: You may deactivate a pool any time by selecting the one required and clicking **Deactivate**, it then appears in the table as Inactive.

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:

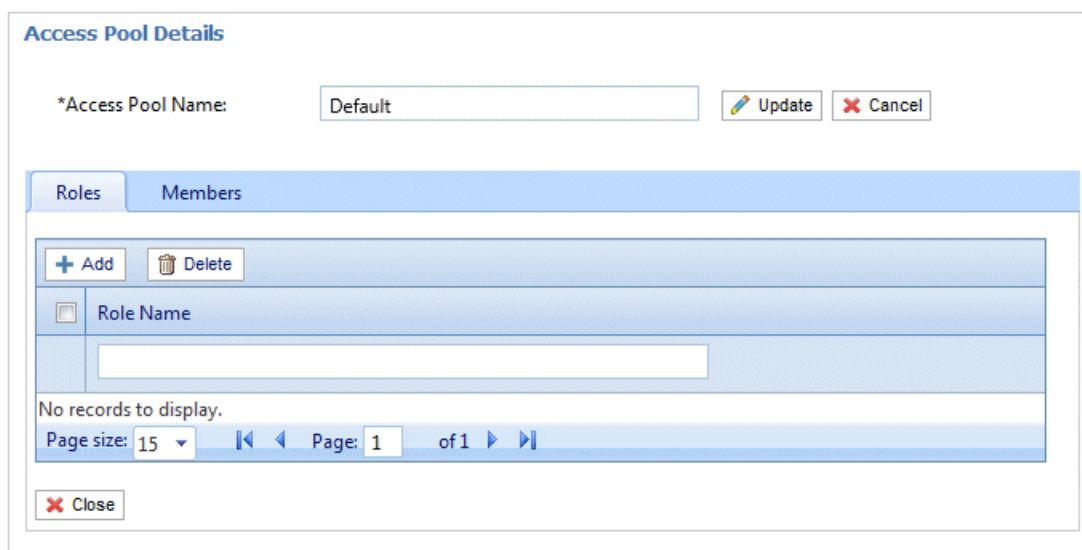
1. In **Access Pools** click **Add**. The following is opened:



The dialog box titled "Add new Access Pool" contains a text input field labeled "*Access Pool Name:". To the right of the input field are two buttons: "+ Add" and "X Cancel".

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:



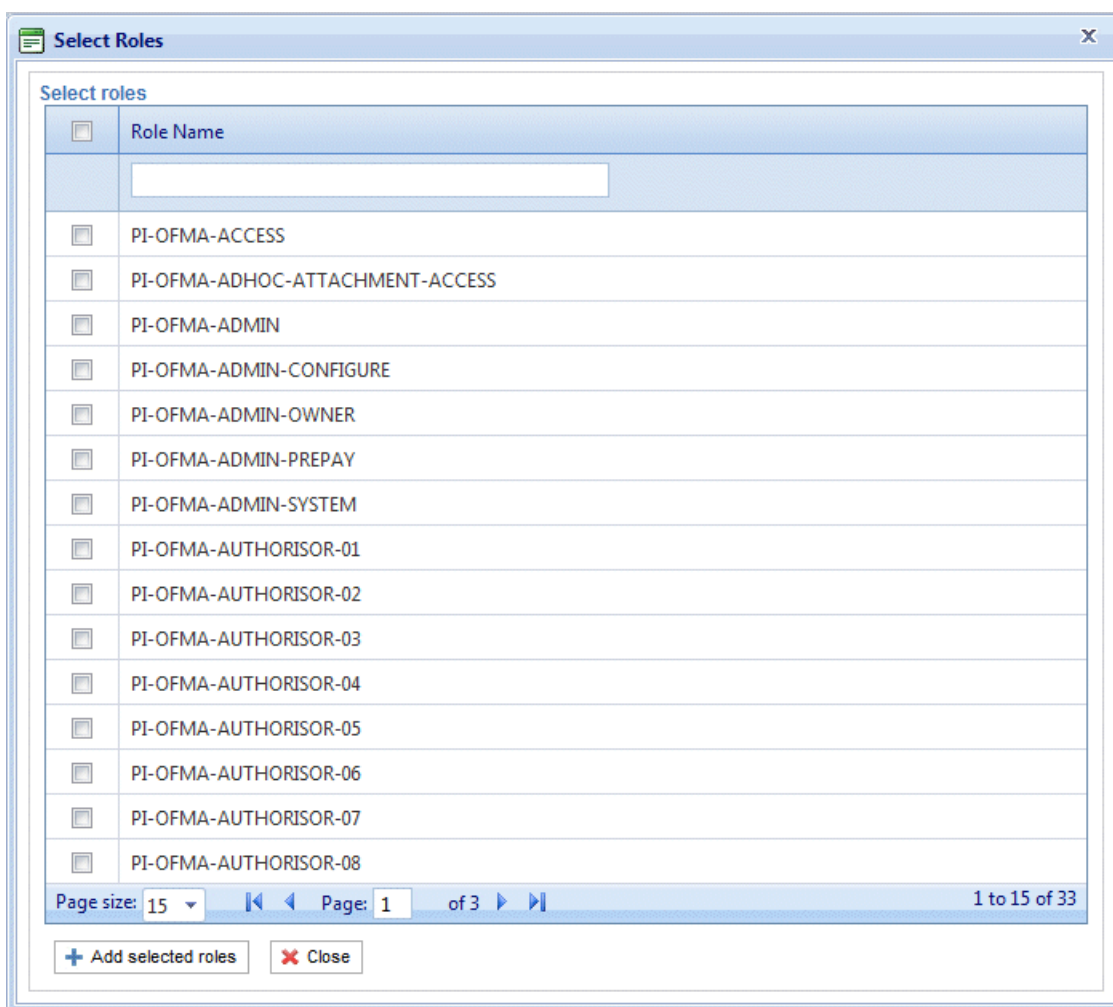
The "Access Pool Details" page shows the "Access Pool Name" as "Default" with "Update" and "X Cancel" buttons. Below this are two tabs: "Roles" (selected) and "Members". Under the "Roles" tab, there are "+ Add" and "Delete" buttons, a "Role Name" column heading, and a search text box. Below the search box, it says "No records to display." and shows pagination: "Page size: 15", "Page: 1 of 1". At the bottom is a "X Close" button.

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 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.

5 - Defining Authorization Pools

Note: This section is only relevant to Mailstream on Demand users

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

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

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

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

Warning:

- Your **Organization Tree** must be populated before you begin creating an Authorization Pool. The process for doing this is described earlier in this guide.
- Before deleting an Authorization Pool carefully consider whether deactivation would be a better option. A deactivated pool may be reactivated at any time but a deleted pool is lost forever and if required again will need to be recreated.

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Editing an Authorization Pool	34
Deleting Authorization Pools	34

Adding an Authorization Pool

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

1. In **Authorization Pool** click **Add**.

The following is opened:

Add New Authorisation Pool

*Authorisation Pool Name:

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

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

Authorization Pool Details

*Authorization Pool Name:

Authorizers

Members

User Name	First Name	Last Name	Department		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

No records to display.

Page size: Page: of 1

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

- The maximum authorization level held by the user. A red hand in this column indicates that no maximum has been set. See [Removing Elements from the Organization Tree](#) to add an authorization role specifying the authorization level.
- If checked the authorizer is warned/emailed when documents require a higher authorization level than permitted by the pool or users have authorization required roles but do not belong to an authorization pool. This means that any documents requiring authorization submitted by the users are never authorized.

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

3. Open the **Authorizers** tab, which lists existing authorizers of this Authorization Pool.
4. To add Authorizers click **Add** to open the following:

<input type="checkbox"/>	User Name	User Email	First Name	Last Name	Department	
<input type="checkbox"/>	EDoolittle	ed@mail.com	Eliza	Doolittle	dept	0
<input type="checkbox"/>	Fhill	feh@mail.com	Freddy	Eynsford-Hill	Accounts	0
<input type="checkbox"/>	HHiggins	hh@mail.com	Henry	Higgins	HR	0
<input type="checkbox"/>	HPickering	hpickering@mail.com	Hugh	Pickering	HR	0
<input type="checkbox"/>	Zoltan	zkarpathy@mail.com	Zoltan	Karpathy	Accounts	0

5. 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.
6. Place a check mark in the boxes of the required users and click **Add selected users**.
Users may be filtered using the text boxes beneath the column heading.
7. Open the **Members** tab, which lists existing members of this Authorization Pool.
8. To add members to this Authorization Pool repeat step #5 through to step #7.
9. Click **Close** to return to the **Authorization Pools Details** page. The added roles appear in the table.
10. Click **Close** to return to the **Authorization Pools** page.
11. The Authorization 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 Authorization Pool is activated, if it is not, it cannot be used.

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

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

- All pools contain at least one Authorizer and one member.
- All users assigned with a PI-OFMA-AUTH-REQUIRED-01 to 09 role are members of an active pool.

- All Authorizers of an Authorization Pool hold an authorization level below or equal to that of the pool.
- All members of an Authorization Pool hold an authorization level below or equal to that of the pool.

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

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

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

Editing an Authorization Pool

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

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

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

The new information is now shown in the table.

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

Deleting Authorization Pools

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

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

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

6 - 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.

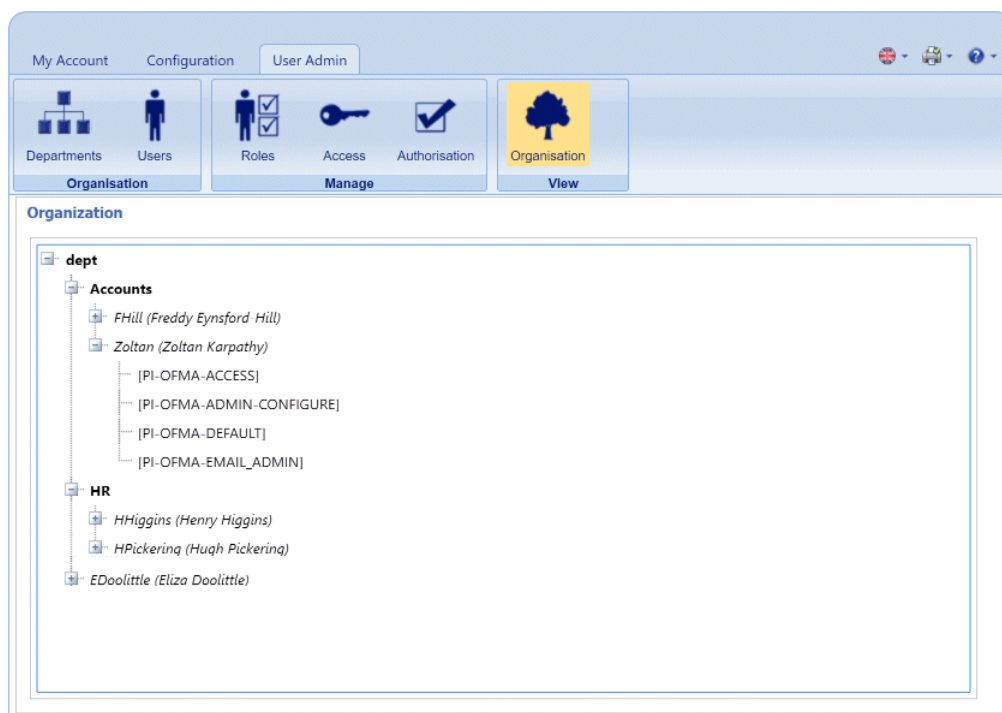
In this section

Your Organization

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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:



Parent Department	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.
Departments	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.
Users	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.

7 - 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.

8 - Activity Logging

The Relay Communications Hub creates activity logs; these record standard activity as well as errors. The logs are helpful in determining and solving system failures quickly and effectively.

The default location of the log files is <Drive>:\OFMAILogs. A configuration file option allows you to specify your preferred location.

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Preventing logs using too much space

To prevent logs using too much disk space you may control the size limit of the file before a log is rolled on to the next file in a configuration option. Rolled logs have a suffix of `_0`, `_1`, `_2` or `_3`. Once the file with the suffix `_3` has reached its limit, the next file created returns to `_0` and the process cycles round. In addition, a configuration option specifies the number of historical logs to be maintained.

Each time a new log is created, the version information of the service creating the log is the first entry in that log.

Each module logs standard activity as well as errors in a single system log. The detail provided is set by a configuration option which allows more detailed information to be gathered when actively investigating a problem.

The messages from each module have a similar layout, although the message content is different. The form:

OFMA_<Version_Number>_<Component_Name>_<MachineName>.txt

Example log file

An example log file is shown below:

```
2012-08-23 20:40:36.0676 4 ERROR PIRelay Communications
HubBundlerNA.MinorTickets
Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\cd39eb4d-2ef5-4aa3-a7d5-77421d0a762b.PDF' because it
is being used by another process.
    at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
    at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
    at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
    at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
    at PIRelay Communications
HubBundlerNA.MinorTickets.processMinorTickets()
```

```

        EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\cd39eb4d-2ef5-4aa3-a7d5-77421d0a762b.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
    maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.Min iTickets.processMiniTickets()
    2012-08-23 20:59:34.3049 11 ERROR PIRelay Communications
HubBundlerNA.Min iTickets
    Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\5cde3530-1c73-4193-9d3e-f39169027366.PDF' because it
is being used by another process.
        at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.Min iTickets.processMiniTickets()
        EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\5cde3530-1c73-4193-9d3e-f39169027366.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
    maybeFullPath)
        at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
        at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
        at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
        at PIRelay Communications
HubBundlerNA.Min iTickets.processMiniTickets()
    2012-08-23 22:05:05.1117 4 ERROR PIRelay Communications
HubBundlerNA.Min iTickets
    Error occurred during adding unprocessed miniticket to textfile
error message is System.IO.IOException: The process cannot access the
file 'C:\Ofma\In\7d1a9be7-b74f-492f-9eaf-46b0a7b88cbc.PDF' because it

```

```

is being used by another process.
    at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
    at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
    at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
    at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
    at PIRelay Communications
HubBundlerNA.Min iTickets.processMiniTickets()
    EXCEPTION OCCURRED:The process cannot access the file
'C:\Ofma\In\7d1a9be7-b74f-492f-9eaf-46b0a7b88cbc.PDF' because it is
being used by another process. IOException Void WinIOError(Int32,
System.String)    at System.IO.__Error.WinIOError(Int32 errorCode, String
maybeFullPath)
    at System.IO.FileStream.Init(String path, FileMode mode,
FileAccess access, Int32 rights, Boolean useRights, FileShare share,
Int32 bufferSize, FileOptions options, SECURITY_ATTRIBUTES secAttrs,
String msgPath, Boolean bFromProxy)
    at System.IO.FileStream..ctor(String path, FileMode mode,
FileAccess access)
    at PIRelay Communications
HubBundlerNA.PDFEncryption.DecryptPDF(String FileName, String aKey)
    at PIRelay Communications
HubBundlerNA.Min iTickets.processMiniTickets()

```

9 - 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](#).

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"> • the Autosub Author in the ticket is an email address • the Autosub Author email address exists as a user in the system

- the Autosub Author belongs to the same company as the User invoking the Upload
- If any of these conditions are not met then we will submit the job as normal as the Hot Folder user (that is, with the User invoking the Upload).

PI-OFMA-DEFAULT	Provides basic rights to Relay Communications Hub Printer Driver users. The default is company specific and can be updated in the Management area of the Roles page.
PI-OFMA-DRIVER-PREVIEW-EDIT	Allows a user to edit information in the Relay Communications Hub Printer Driver's Preview Panel.
PI-OFMA-ELECTRONIC-ATTACHMENT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access Electronic Attachments as configured in that page of the Relay Communications Hub website for one specific company.
PI-OFMA-EXTERNAL-PDF-ATTACHMENT-ACCESS	Allows the Relay Communications Hub Printer Driver user to access upload external PDF attachments.
PI-OFMA-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.

10 - 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

AMER:	Hours: Monday - Friday from 08:00 – 20:00 EST excluding US Holidays Phone: +1 800 367 6950 Or if dialing from outside the US: +1 518 285 7283
APAC:	Hours: Monday – Friday from 08.00 - 18.00 AEST excluding Public Holidays Phone: +1 800 648 899 Or if dialing from outside Australia : +61 2 9475 3500
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