pitney bowes

Ship & Mail
Mailing Software

Relay Unify uBridge

User Guide

US English Edition
January 2025

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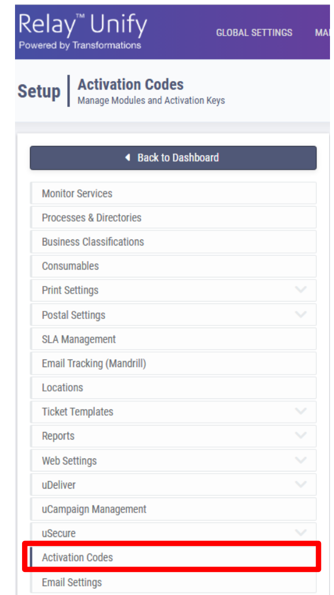
Purpose

The purpose of allowing a custom status is to make it easy for submissions to be stopped at any point to have some external process run before proceeding to the next status. Relay Unify uBridge also allows you to set up processes and jobs to be run on a schedule or triggered by a custom status.

Activation



Before Relay Unify uBridge can be used the user must obtain an activation key from Pitney Bowes Support. One key will be needed per database, so most clients will need a key for their development as well as their production environments.

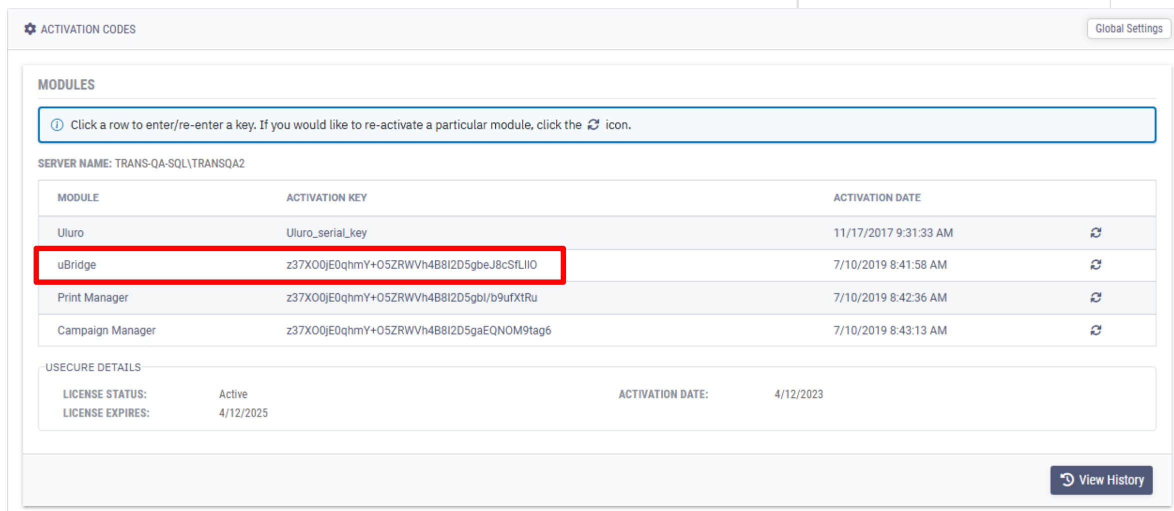
You will need to enter the activation key in uSetup. From the Global Settings Tab, select the Activation Codes Tab.

Select Relay Unify.

Enter the Serial Number. Click Save.

Select Relay Unify uBridge.

Enter the activation key. Only a correct activation key and serial number combination will work.



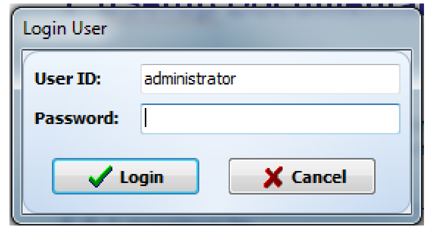
Once Relay Unify uBridge has been activated, you will be able to log into the module as any Relay™ Unify, Powered by Transformations user.

Main Window

Login

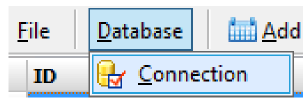
Users must log in each time. When the program is started, the log in box will display.

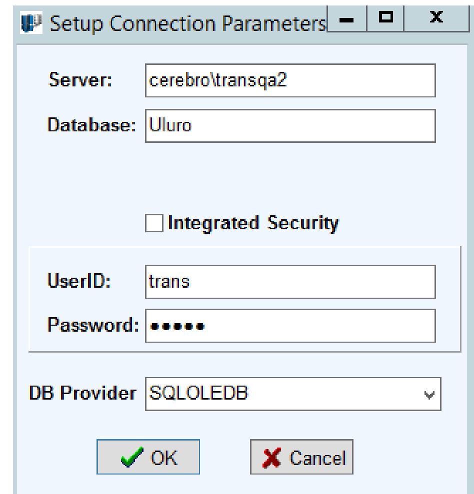
Enter your User ID and Password. Click Login.



DB Connection

This contains the connection option. Selecting connection will display the Connection window.





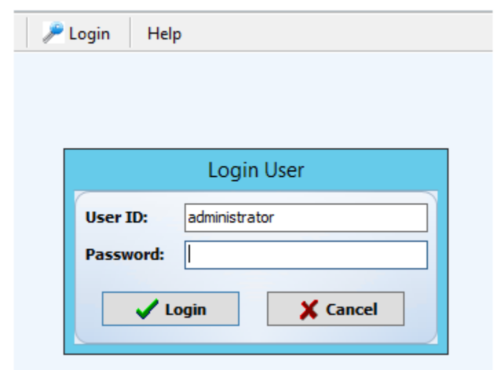
Enter the Database Server Name or IP Address
Enter the name of the Relay Unify database
Enter the database user id
Enter the database password
If you are not using TLS select SQLOLEDB. If you are using TLS 1.2 select either SQLNCLI11 or MSOLEDBSQL.

Once you click OK, you will need to login to the Relay Unify uBridge module.

Exit the program

File

The only option under file is Exit. This closes the program. You can also close the program by clicking the X in the top right corner or the program window.



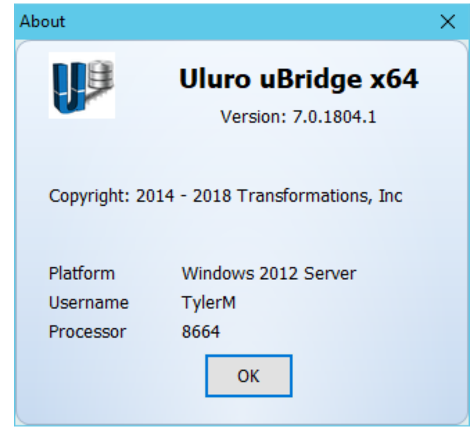
Logout

Click on Logout from the main menu items at the top of the main window. Once you do so, the Logout button will change to Login and the Login User window will appear once you click Login. This can be used to login as the previous user or a new user.

Version Information – Help Menu

To determine the version of Relay Unify uBridge you are running, select the Help Menu and About.

The version of the program will then be displayed.



Main View

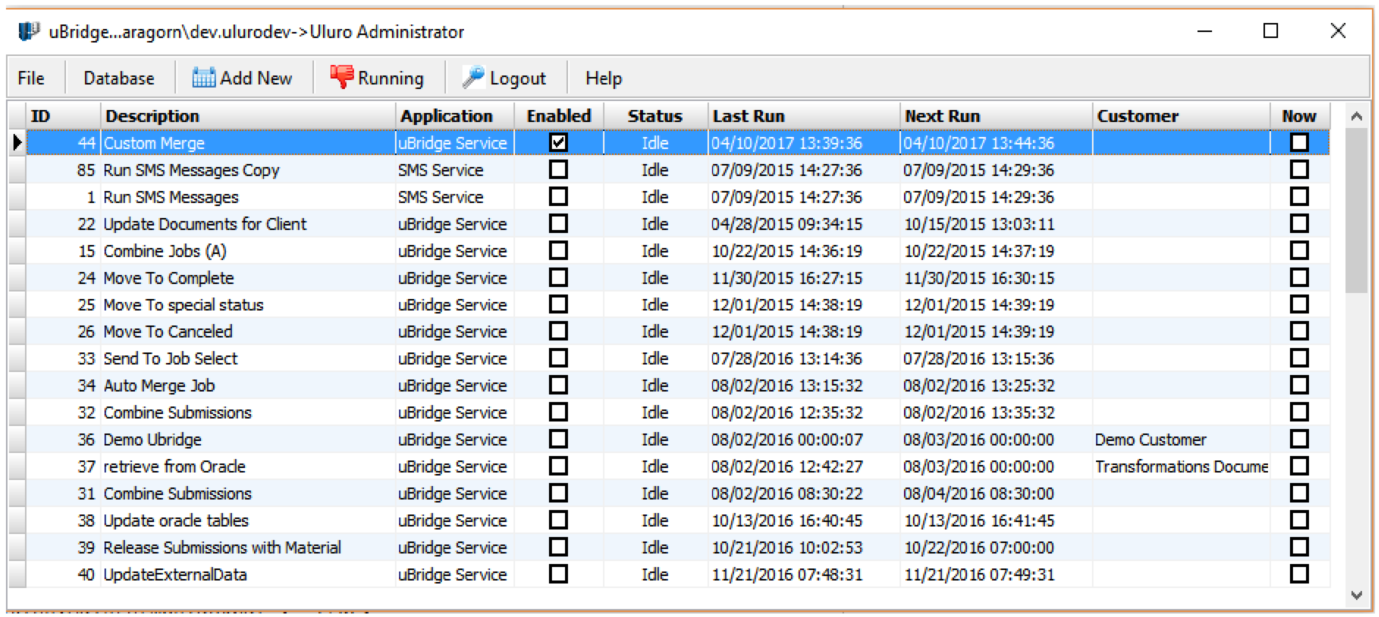
The main window shows the jobs that have been created.

The **Description**, **Application**, and **Enabled** column display what is currently set up within the job details.

Status – This will either display Running if the job is being run, or Idle in between running. Only jobs that are in Idle status can be edited.

Last Run tells you the most recent time the job was completed. **Next Run** displays when the job will run based on the frequency within the job details.

Customer – If a customer has been selected in the parameters of a Relay Unify uBridge job, that will be displayed here.



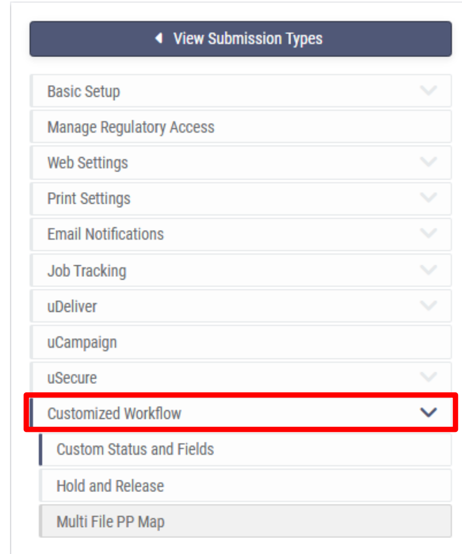
ID	Description	Application	Enabled	Status	Last Run	Next Run	Customer	Now
44	Custom Merge	uBridge Service	☑	Idle	04/10/2017 13:39:36	04/10/2017 13:44:36		☐
85	Run SMS Messages Copy	SMS Service	☐	Idle	07/09/2015 14:27:36	07/09/2015 14:29:36		☐
1	Run SMS Messages	SMS Service	☐	Idle	07/09/2015 14:27:36	07/09/2015 14:29:36		☐
22	Update Documents for Client	uBridge Service	☐	Idle	04/28/2015 09:34:15	10/15/2015 13:03:11		☐
15	Combine Jobs (A)	uBridge Service	☐	Idle	10/22/2015 14:36:19	10/22/2015 14:37:19		☐
24	Move To Complete	uBridge Service	☐	Idle	11/30/2015 16:27:15	11/30/2015 16:30:15		☐
25	Move To special status	uBridge Service	☐	Idle	12/01/2015 14:38:19	12/01/2015 14:39:19		☐
26	Move To Canceled	uBridge Service	☐	Idle	12/01/2015 14:38:19	12/01/2015 14:39:19		☐
33	Send To Job Select	uBridge Service	☐	Idle	07/28/2016 13:14:36	07/28/2016 13:15:36		☐
34	Auto Merge Job	uBridge Service	☐	Idle	08/02/2016 13:15:32	08/02/2016 13:25:32		☐
32	Combine Submissions	uBridge Service	☐	Idle	08/02/2016 12:35:32	08/02/2016 13:35:32		☐
36	Demo Ubridge	uBridge Service	☐	Idle	08/02/2016 00:00:07	08/03/2016 00:00:00	Demo Customer	☐
37	retrieve from Oracle	uBridge Service	☐	Idle	08/02/2016 12:42:27	08/03/2016 00:00:00	Transformations Docume	☐
31	Combine Submissions	uBridge Service	☐	Idle	08/02/2016 08:30:22	08/04/2016 08:30:00		☐
38	Update oracle tables	uBridge Service	☐	Idle	10/13/2016 16:40:45	10/13/2016 16:41:45		☐
39	Release Submissions with Material	uBridge Service	☐	Idle	10/21/2016 10:02:53	10/22/2016 07:00:00		☐
40	UpdateExternalData	uBridge Service	☐	Idle	11/21/2016 07:48:31	11/21/2016 07:49:31		☐

Now – If Run Now was selected for a job this will be checked. This will not be checked by jobs running that were triggered to run from their frequency settings.

Custom Status

Setting up a custom status is done in uSetup within a submission type. A custom status is set per submission type.

Click on Customized Workflow > Custom Status and Fields.



On the left side, you will see a grid with a list of the current Relay Unify statuses. This list cannot be changed. A Custom Status can be added and will go between 2 of the Relay Unify statuses based on the order field.

In the center is the list of custom statuses that have been created for that submission type.

To add a custom status, click + Add Custom Status.

Enter a **Status** code.

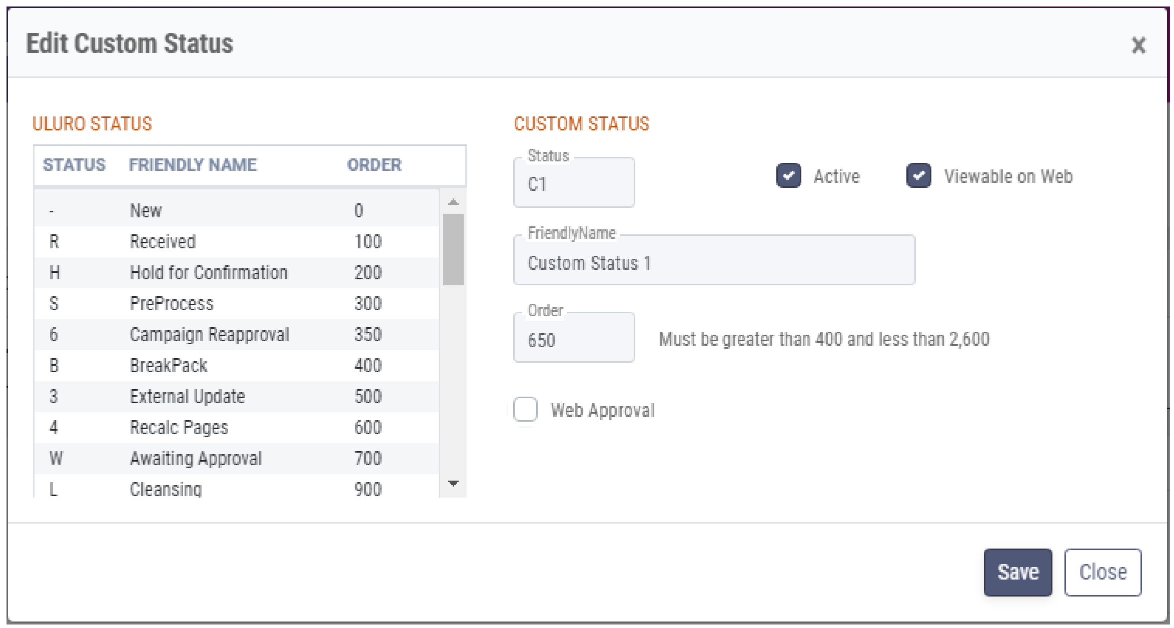
- It cannot start with a number. These are reserved for Relay Unify.
- It must be 2 characters in length.
- The order must be greater than 400 and less than 2600. It must occur after BreakPack and before Complete.
- The following cannot be used – ‘AR’, ‘MA’, ‘PC’, ‘PP’, ‘SO’, ‘IC’

Enter a **Friendly Name**. This will be what is displayed as the name of the status through Relay Unify.

Enter the **Order**. This is where the status will be in relation to the standard Relay Unify statuses.

Check **Active** to make it active. If it is inactive, the submissions will not process through this custom status.

Check **Viewable on Web** to allow the status to show on the web.



A custom status can be created to trigger the additional web proofing. To use this functionality, enhanced web proofing will also need to be enabled on the submission. Web Approval will need to be checked as well as Viewable on Web. Once Web approval is checked, there will be a New Status when Approved that allows you to select the next status. The best practice would be to select the next Relay Unify or Custom status based on the Order number. If the submission is not setup for that status, it will proceed to the next status. If this is used to skip to a later status, that can be selected.

If one of the purposes of this custom status is to perform document pulls, check **Document Pull.** That will enable a column with the ability to check which documents should be pulled from being sent out. It is important to note that it will not change any communication sent out to an end user, pull the document from the print job, or web presentment.

Click Save.

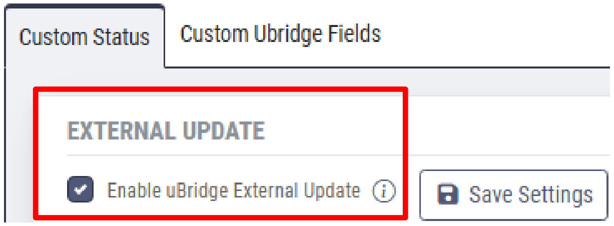
To delete a custom status, select it from the list of statuses that have been created and click the Trash button.

External Update Status

This Relay Unify status is a custom status that can be used to trigger Relay Unify uBridge jobs. To use this, you do not need to set up a custom status.

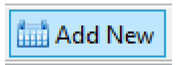
Within the submission type, under the Additional tab, check to enable the Relay Unify uBridge External Update.

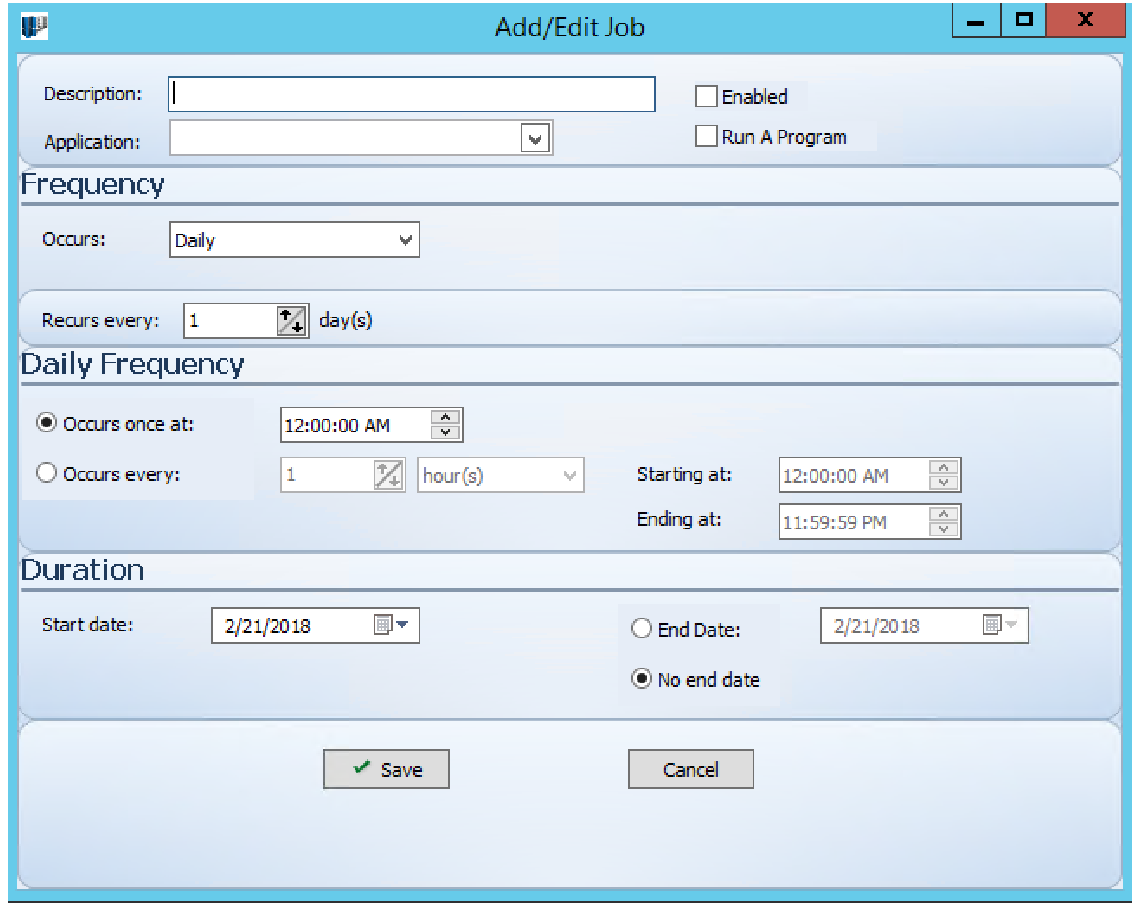
Any submission processed using this submission type will stop in External Update status. You will need a Relay Unify uBridge job that moves it out of that status.



Creating a Relay Unify uBridge Job

Click on the Add New button on the main window.





Description – The text entered here will be displayed in the Description column on the main window.

Enabled – Check to enable the job. The default is not enabled to allow you to edit all the settings before activating the job.

Application – Select an application to use. If you choose Relay Unify uBridgeSrv, a Params button will appear to set up your scripts.

Run a Program – This needs to be checked if you are running an external program.

Frequency
Select Daily, Weekly or Monthly from the Occurs dropdown. The recurring settings for that frequency will appear for the setting you selected. Enter the specific daily, weekly, or monthly settings.

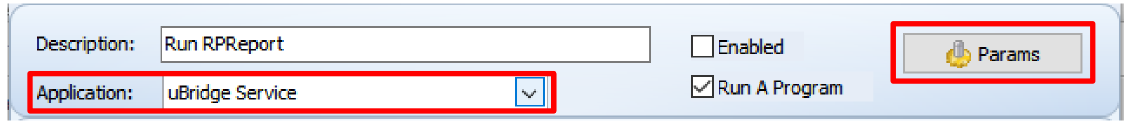
Daily Frequency
The job can run once at a specified time or Occurs every x hours, minutes or seconds based on a starting and ending time.

Duration
Enter the start date for the job to begin running and the end date for it to no longer run. You can select no end date if you do not want it to stop running the job after a certain date.

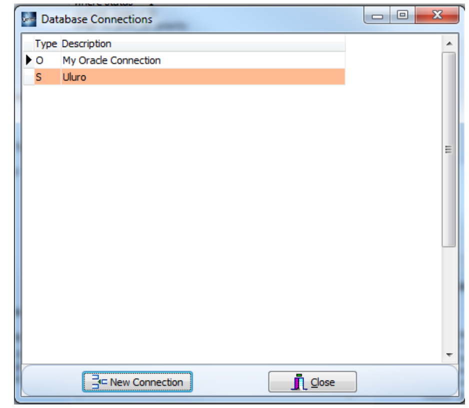
Click Save.

Parameters

If the job is using Relay Unify uBridgeSrv for the program, you will see the Params button at the top. Click on the Params button.



This will bring up the Parameters screen. If you are running a program, it will bring up the Run Program screen. You can either run a program or setup parameters; you cannot have both for one Relay Unify uBridge job.



Connections
You will need to setup database connections before you can complete your Parameters. Click on the Connections button. To create a new connection, click New Connection.

Select the connection type.

Oracle
Enter a description.

Enter the host. This can be the name or IP Address.

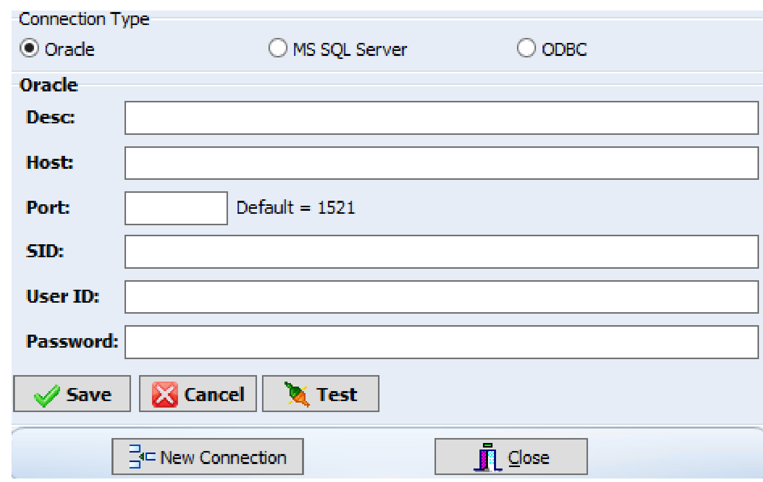
Enter the port.

Enter the SID.

Enter the User ID.

Enter the Password.

Click “Test” to test the connection. If the connection is good, click “Save”.



MS SQL Server

Enter a description.

Enter the server. This can be the name or IP Address.

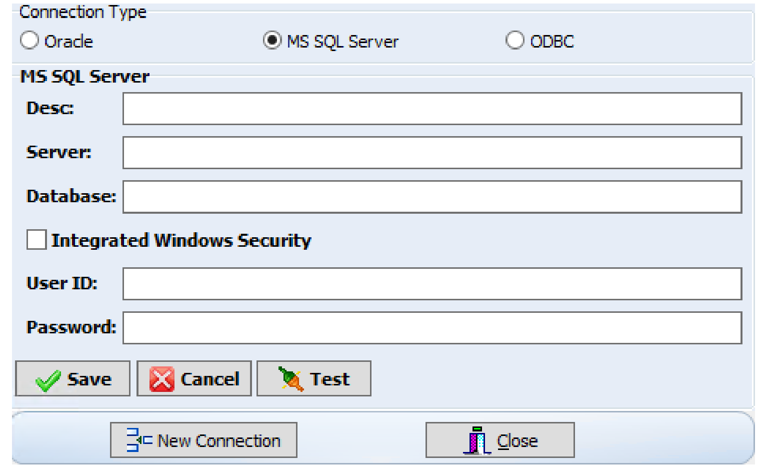
Enter the database.

If you are using Integrated Security, check the box.

Enter the User ID.

Enter the Password.

Click “Test” to test the connection. If the connection is good, click “Save”.



ODBC

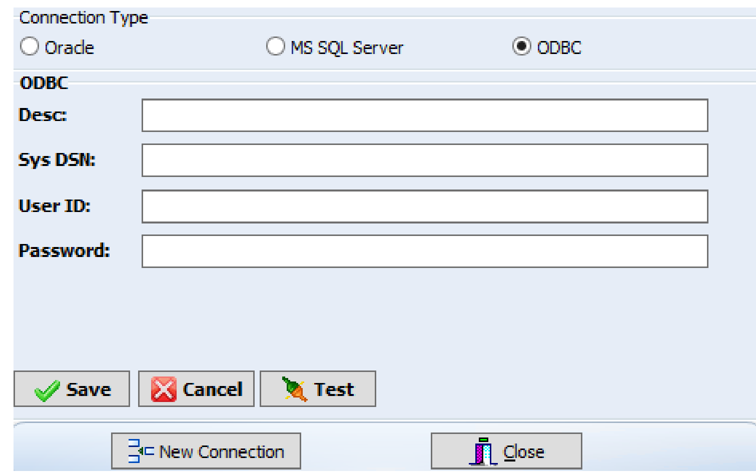
Enter a description.

Enter the Sys DSN. This is the same name as the system DSN setup in Windows through ODBC Data Sources.

Enter the User ID to the DB that was selected during the setup of the system DSN.

Enter the Password to the DB that was selected during the setup of the system DSN.

Click “Test” to test the connection. If the connection is good, click “Save”.

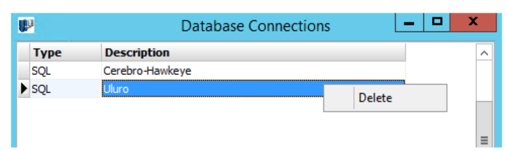


Editing an existing connection

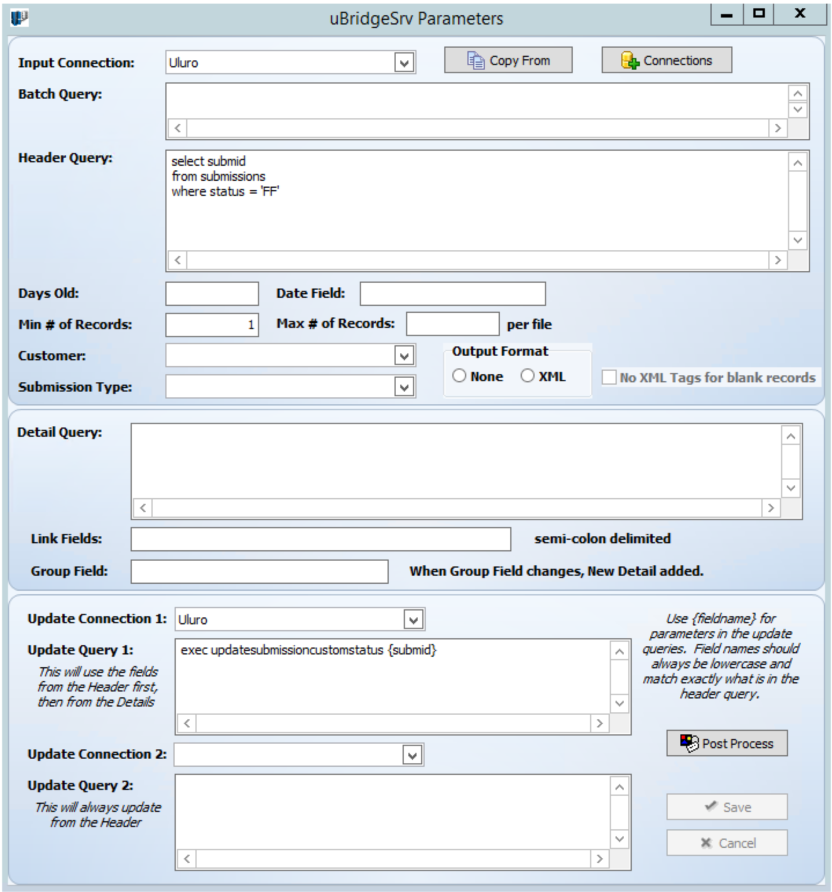
To edit an existing connection, double-click on the connection from the list of all connections. Make the necessary changes. Click Test to test the connection. If the connection is good, click Save.

Deleting an existing connection

To delete a connection, select the connection and right-click. Select Delete.



To enter your parameters, do the following.



Select an **input connection**. This is where the data will be read from.

Batch Query – This runs before the header query if you need an additional query; you cannot read from this query.

Header Query. This will be the data that will drive the process. If this query executes a stored procedure that will return a data set (rather than do a process) you must put - - select prior to executing the stored procedure.

Days Old. If this is greater than zero, it will force the program to pick up any records that are the value or greater in age than the current date. You must enter a date field. The date field must be in one of the tables in the header query. If not, the job will fail.

Date Field. This is required if using Days Old. This would be the actual field to compare the current date.

Min # of Records. If you want to only process the data if there are a minimum number of records, enter a value greater than zero. If the data returned by the header query has less than the minimum, the data will not be processed. Days old overrides the minimum.

Max # of Records. Enter a value here to limit the number of records per file. If the number of records returned by the Header Query is greater than the Max # of Records, the output will be divided into multiple files (submissions).

Customer. Select a customer. This applies ONLY if an output format is selected and is required. If a customer is selected, that will be displayed in the Customer column on the main window.

Submission Type. If a client has been selected, this dropdown will list all submission types for that client. Select a submission type. This applies ONLY if an output format is selected and is required.

Output Format. If you intend to output the results to a file for processing by Relay Unify, select an output format. Selecting None disables output; no file will be created. Selecting XML produces an XML file that will be placed in FTP folder for the submission type selected for that customer. If XML is selected, the **No XML Tags for blank records** will become available to check. If checked, the data fields that are blank will not have an XML tag to decrease file size. The data file created will be placed in the FTP directory for the submission type selected.

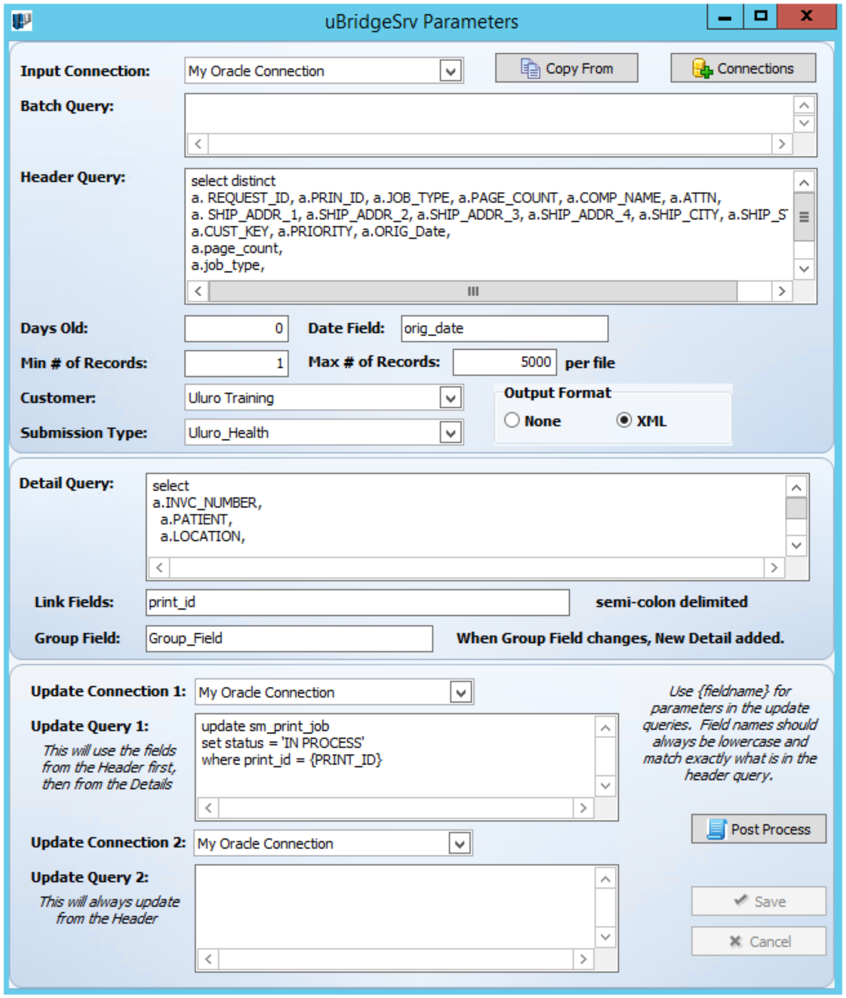
Detail Query. Enter the detail query. This will pull records linked to the Header Query using the link fields.

Link Fields. Enter the field names that link the header to the details. Each field name should be semicolon delimited.

Group Field – This field must be returned in the detail query and is typically what the query is ordered by. Once the value changes, a new detail XML section is created.

Update Connection 1. Select a connection to use for Update Query 1.

Update Query 1. Enter a query to do database updates after each detail record is processed. To do value substitution, use {fieldname} in the query. The fieldnames MUST match exactly the fields returned from either the header or detail query. Example – update mycustomers set customername = {custname} where customerid = {custid}. "custid" and "custname" must be returned by either the header or detail query.

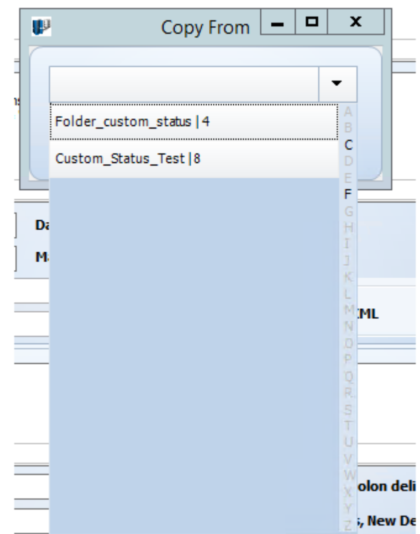


Update Connection 2. Select a connection to use for Update Query 2.

Update Query 2. Enter a query to do database updates after each header record is processed. This only uses field values from the header query.

Click Save to save your changes or Cancel to cancel your changes.

Copy From
Use Copy From to copy the parameters from another job to the current one. Click the Copy From button. Select a Relay Unify uBridge job to copy parameters from. Click Ok. If there were parameters for the job previously, the parameters you copied over will overwrite the previous parameter settings.



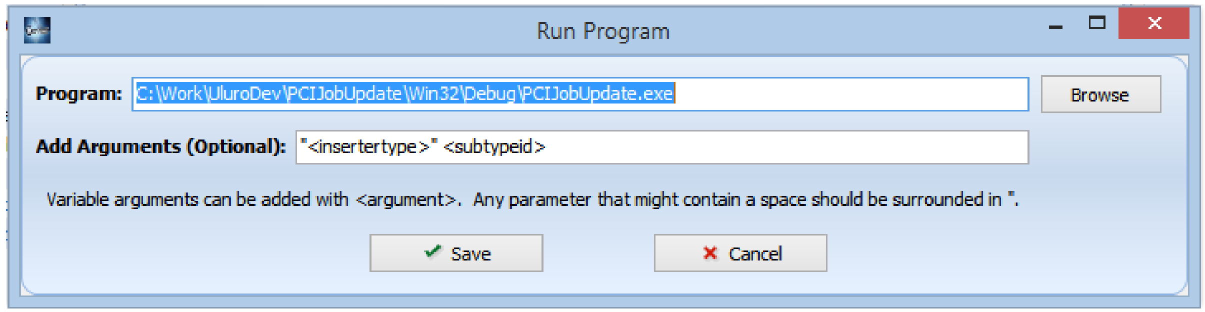
Run a Program

If Run a Program is checked for a Relay Unify uBridge job, when you click on parameters, it will bring up the run program screen instead of the parameters.

Enter the program or browse to select one. The program must be accessible by the Relay Unify uBridge Service.

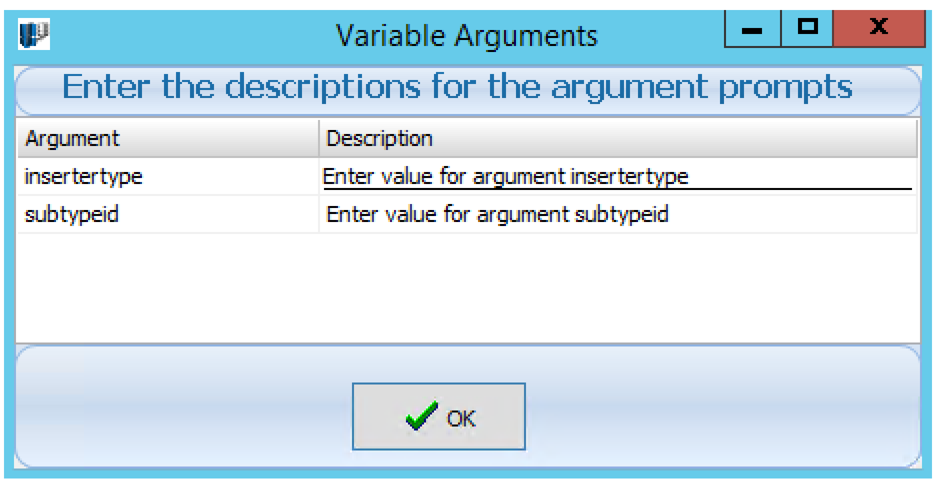
Add any command arguments. Variable arguments must be surrounded by <>. If it is possible for the value of an argument to contain spaces, the argument needs to be surrounded by double-quotes.

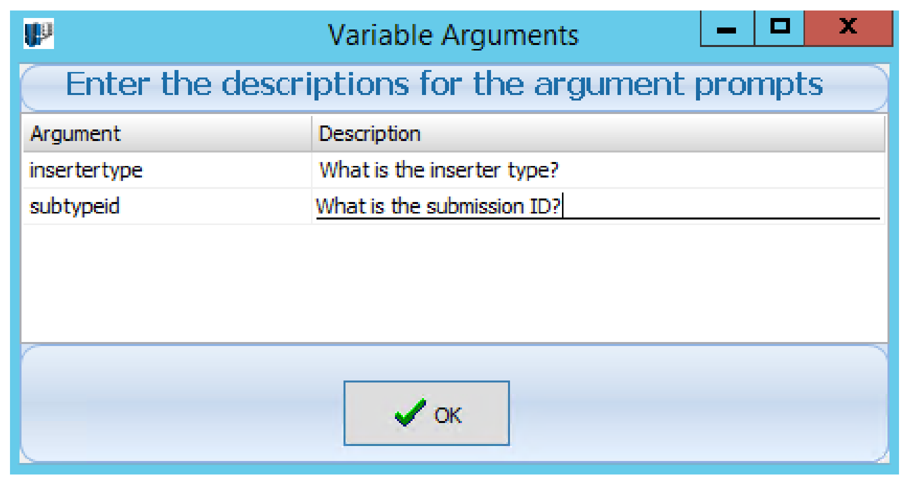
Click Save.



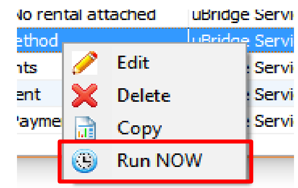
Entering variable arguments

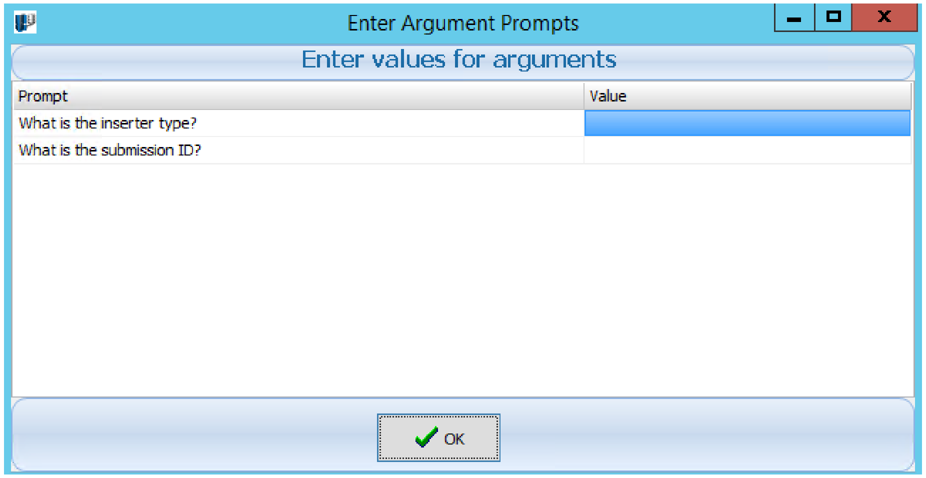
If the arguments previously entered contain variables, this screen will appear once Save was clicked on the previous screen for selecting the program to run. This is where you will need to enter the values of the variables. The argument column will display the variable arguments previously entered. Enter the description for each argument. This will tell the user what to do when they attempt to do a Run Now. Click OK.

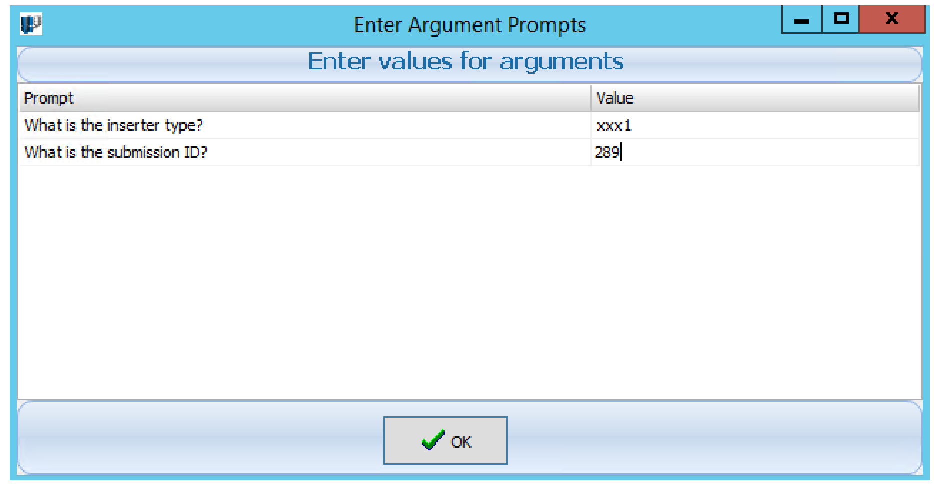




If you select a job to run immediately, by right clicking a job on the main window and selecting Run NOW, you will be asked to enter the variable argument values if the job requires them.







You will need to run the job manually once to store the values for the variable arguments. The values will be there for when it is run automatically based on the frequency settings or for the next time it is run manually.

Once the values have been entered, click OK. The job will then run immediately.

Post Process to Link Relay Unify uBridge Jobs

The Post Process button has been added to link multiple Relay Unify uBridge jobs to run in order.

The initial Relay Unify uBridge job must be active. In the parameters for that job, click Post Process.

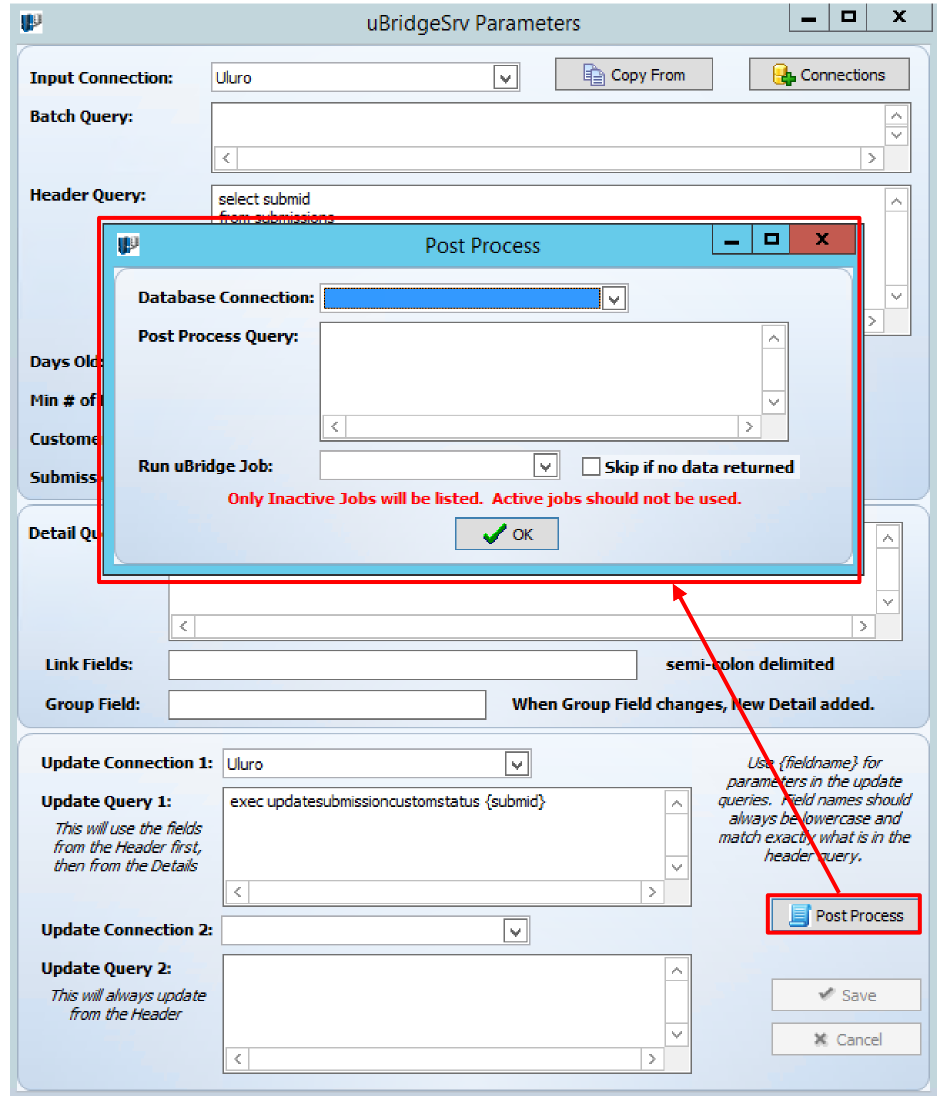
Enter the Database connection. Can be blank if there is no query and it is only calling another Relay Unify uBridge job.

Enter the query to run that will gather the information needed for the next Relay Unify uBridge job. This can be used as a third update query as well.

Select the Relay Unify uBridge job (that must be inactive) to run once this one is complete.

If no data is returned from the Relay Unify uBridge job the remaining ones linked will not be run if "Skip if no data returned" is checked.

The submission will then continue to process.

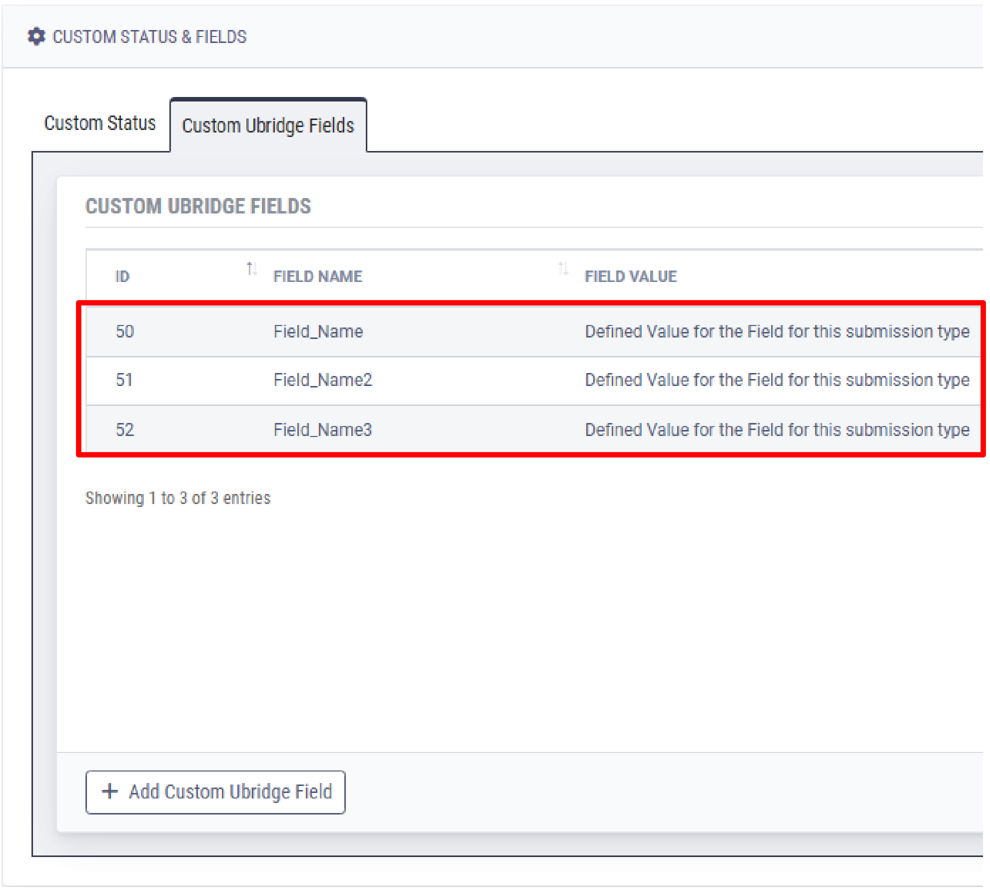


Submission Type Custom Fields

To provide additional flexibility in Relay Unify uBridge jobs it is sometimes necessary to store additional information per submission type. These values will be available only to Relay Unify uBridge. It is not intended that these values will be available in a map, banner pages, or other programs used for mapping or creating communications.

Under the additional tab in a submission type, the Extra Fields section provides full CRUD capabilities for the Sub Type Extra fields.

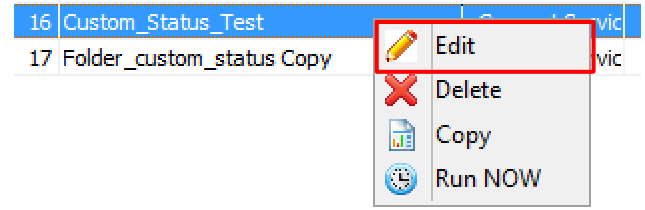
Enter the Field Name and the Field Value to define the field for this submission type.



As submissions for this submission are being processed, the Relay Unify uBridge jobs will reference the fields and values defined here from the SubTypeExtraFields table.

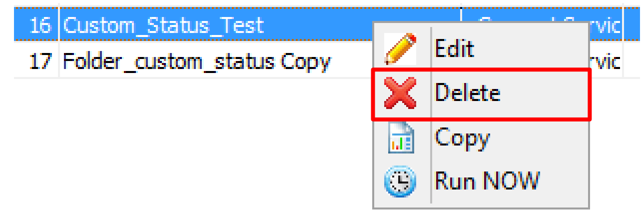
Editing a Job

To edit a job, select the job and right-click. Select Edit. You can also just double click the job from the list of jobs.



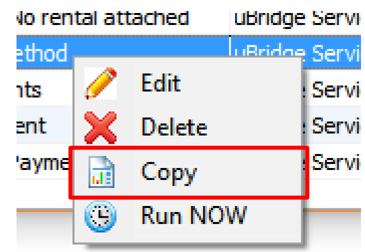
Deleting a Job

To delete a job, select the job and right-click. Select Delete.

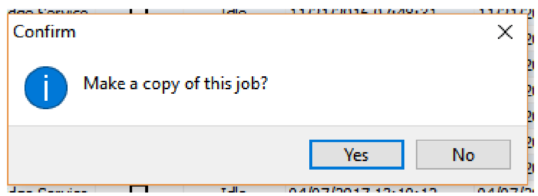


Copy Job

To copy a job, right-click on the job you wish to copy and select Copy.



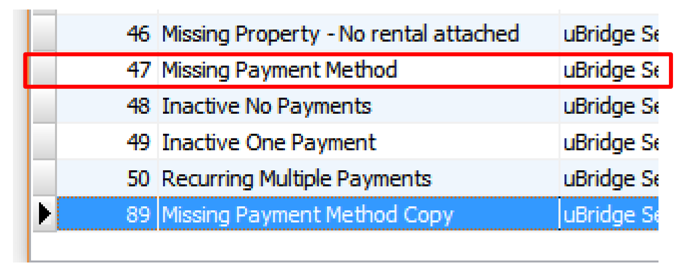
Confirm you want to copy this job.



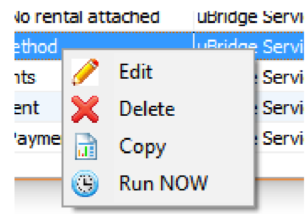
A copy of the job will then be created.

The new job will have the same description as the old job with – Copy at the end. A second copy would have – Copy2 at the end, etc. The copy is of everything including the parameters of the job.

By default, the copy will not be enabled.



Running a Submission that uses a Relay Unify uBridge Job



Setting a Job to Run Immediately

If you don't want to wait for the frequency settings to run the job, you can manually run the job immediately. To cause a job to run immediately, select the job from the main window and right-click. Select Run NOW. This will set the next run date to the current date and time. The Now checkbox will be checked to indicate it has been marked to Run Now.

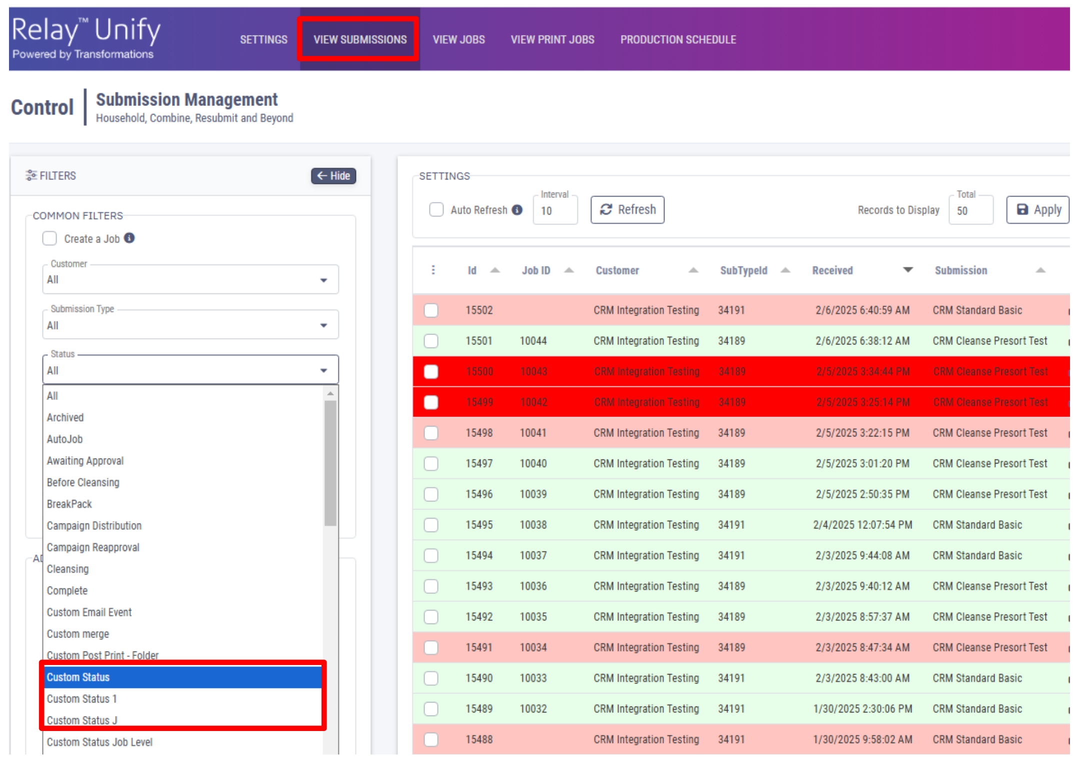
Running

Clicking on this button on the main window will turn Running on or off. If Running is on, the grid will display status changes of the jobs that are enabled. If it is running the status will display Running rather than Idle. This program does not actually run the jobs.

Tracking by Status

uControl

uControl has a tab where a user can view submissions that are currently in or will be going into a status. This would include custom, and Relay Unify standard statuses. Go to the View Submissions Tab. The custom statuses will appear in the Status Dropdown menu in the Common Filters.



Select a status from the dropdown box. The grid will display the submissions that are currently in or will be going into that status.

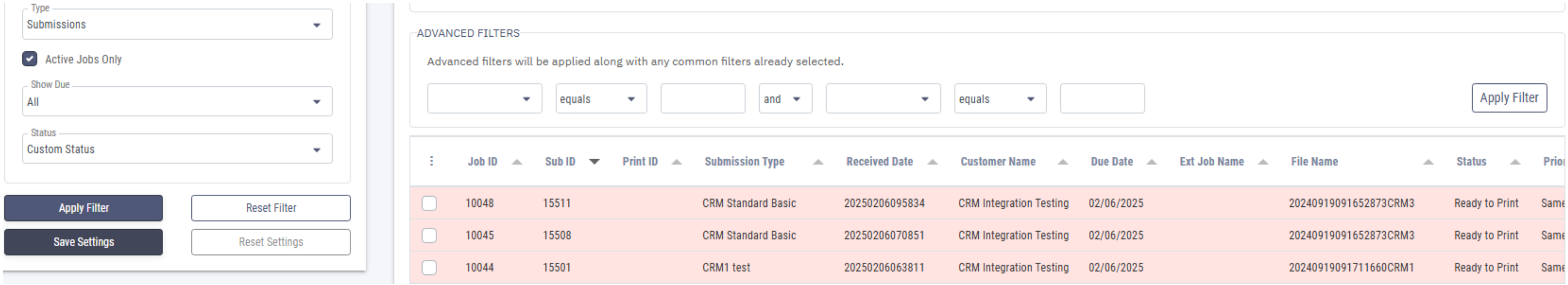
The status selected on this tab will be saved upon exiting the program after selecting the Save Settings button. The next time you start the program, the saved status will be loaded. This provides an easy way for the user to always watch a certain status.

Relay Unify Track (Production Schedule)

Relay Unify Track allows you to filter by submissions that are currently in or will be going into a particular status.

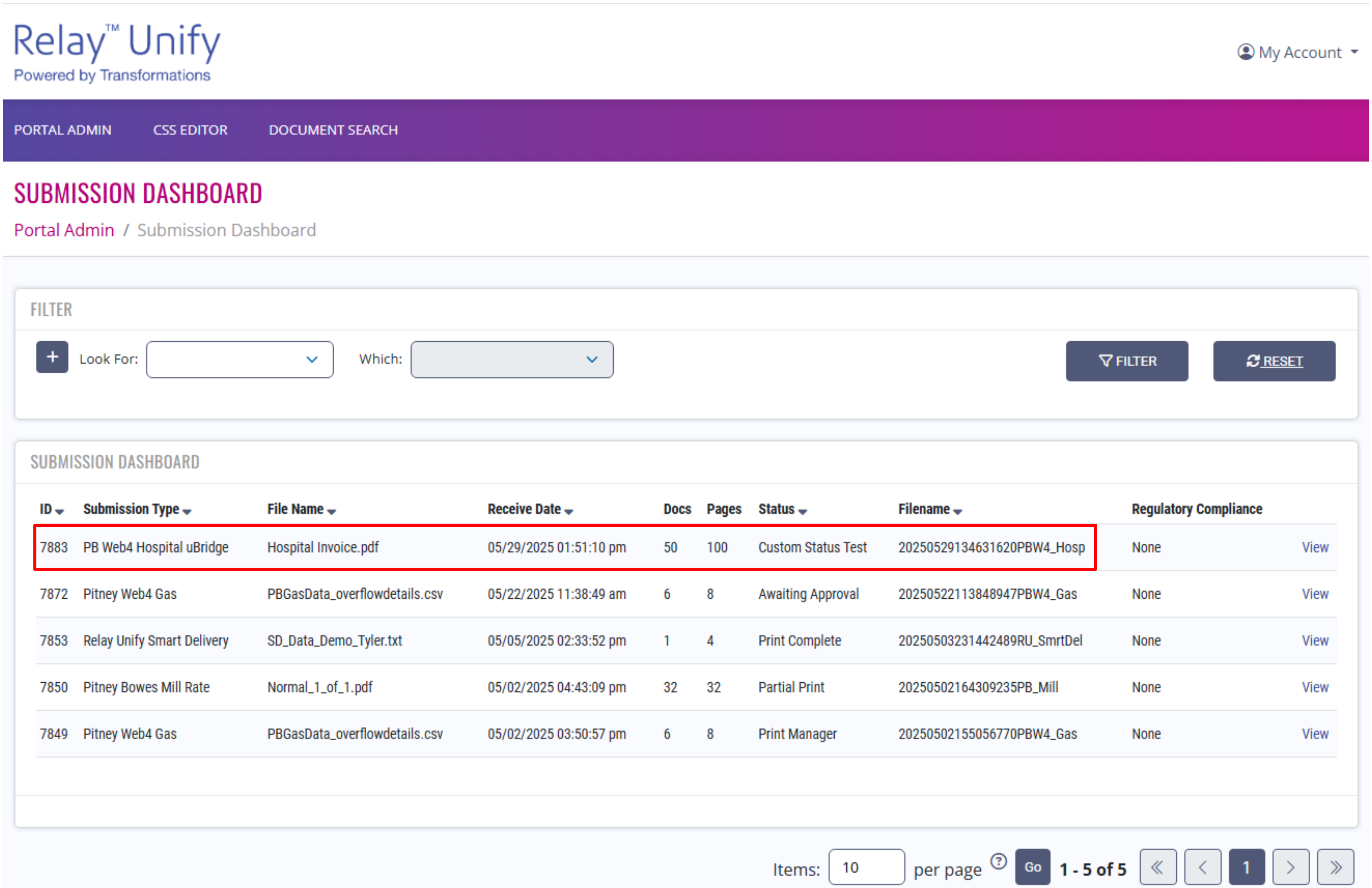
On the Production Schedule Tab, you will see a Status Dropdown box. This will list all custom statuses and can be used to search for submissions in a Custom Status.

Custom statuses will be shown in the list after being selected. Select a custom status to view from the dropdown. Submissions that are in or will be going to that status will be displayed. Going To means that status occurs after the status (according to the order of statuses which can be found where custom statuses are created) the submission is currently in. The submission may or may not go there depending on the settings in the submission type.



Web

The dashboard on the admin main page of the web portal will display the submission and its custom status if Viewable on the Web is checked for that custom status.

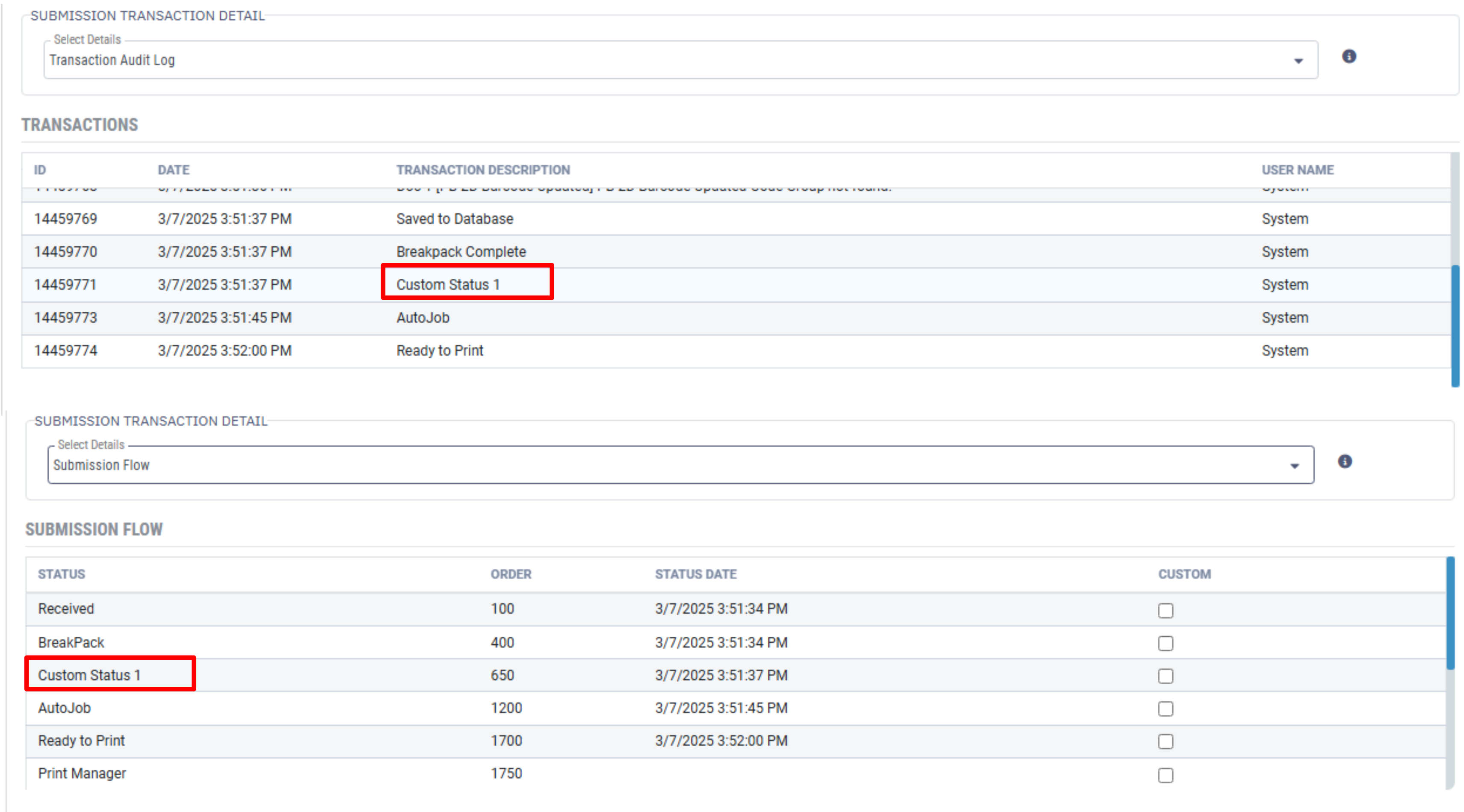


Viewing the flow of the submission

You can view the flow of a submission from uControl by right clicking on a submission and selecting View Details, or uSetup by double-clicking on the submission.

The Transactions Tab displays the statuses the submission went through from Received to Complete.

The Submission Flow will also display the statuses from Received to Complete. The date that the submission hit that status will also show. Resubmitted submissions will not show a received date. This tab has an additional column of Custom which will be checked if the status was a custom status setup and enabled in the submission type.


SUBMISSION TRANSACTION DETAIL

Select Details: Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14459769	3/7/2025 3:51:37 PM	Saved to Database	System
14459770	3/7/2025 3:51:37 PM	Breakpack Complete	System
14459771	3/7/2025 3:51:37 PM	Custom Status 1	System
14459773	3/7/2025 3:51:45 PM	AutoJob	System
14459774	3/7/2025 3:52:00 PM	Ready to Print	System

SUBMISSION TRANSACTION DETAIL

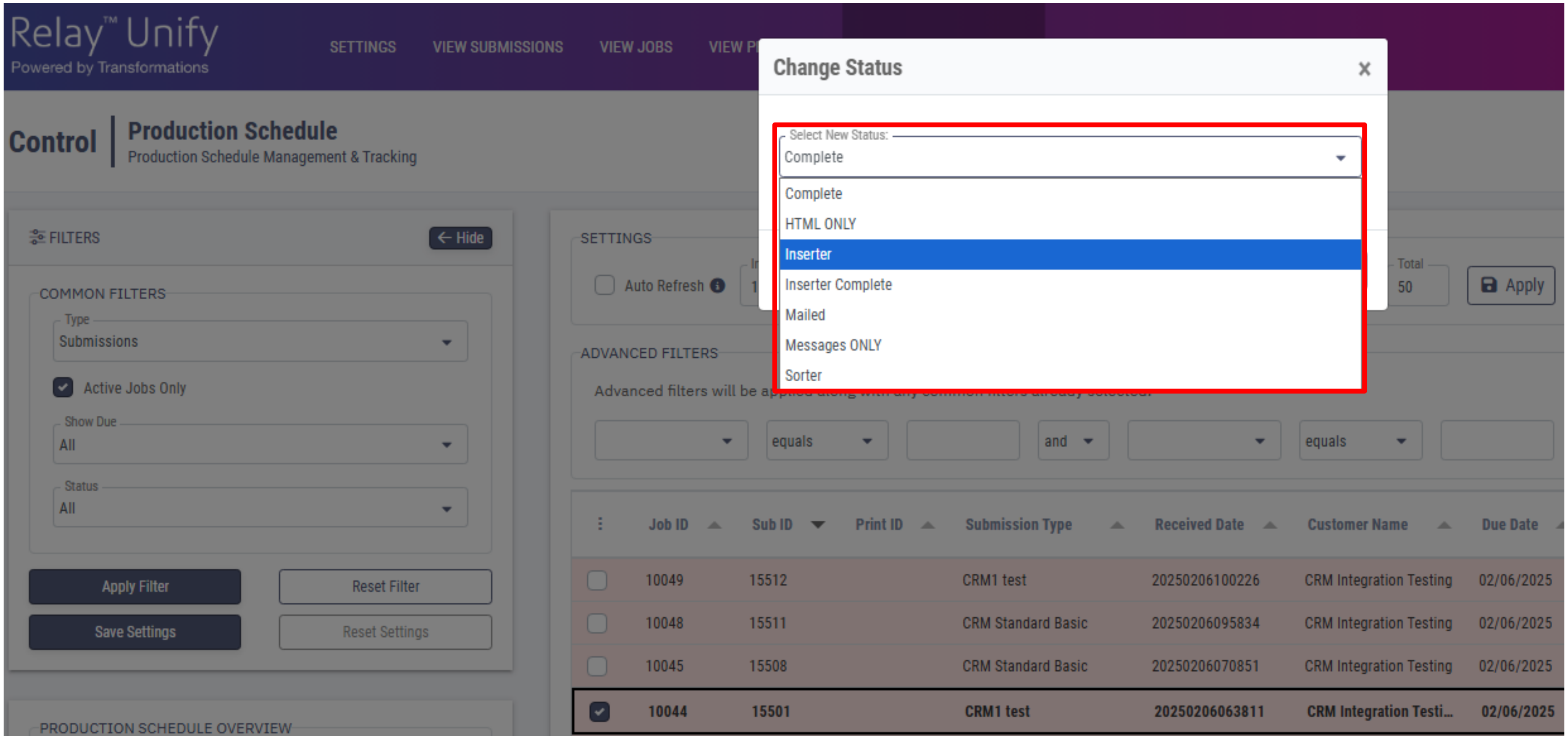
Select Details: Submission Flow

SUBMISSION FLOW

STATUS	ORDER	STATUS DATE	CUSTOM
Received	100	3/7/2025 3:51:34 PM	☐
BreakPack	400	3/7/2025 3:51:34 PM	☐
Custom Status 1	650	3/7/2025 3:51:37 PM	☐
AutoJob	1200	3/7/2025 3:51:45 PM	☐
Ready to Print	1700	3/7/2025 3:52:00 PM	☐
Print Manager	1750		☐

Changing Statuses in uControl

In uControl you can change statuses to anything that occurs after Print Complete Status, including custom statuses. Click the submission of choice, then right click and choose the Change Status button on the Production Schedule Tab to see the list of statuses.



SLA Email Events for Custom Statuses

Custom statuses used by Relay Unify uBridge are available for SLA email tracking. You can also set up an internal/external email for use by all the SLA events or a different one for each SLA event. This way if an internal email needs to go to Bill and Ryan for awaiting approval being missed, and Alex and Tiffany if it is in Custom Status 1 status too long. Click on the button for Setup Email Events for this SLA ONLY for that scenario.

If there is a specific SLA email setup for that SLA scenario, the SLA email events for ALL will not be sent. In the case above, there is an internal email for this SLA only setup. Even if external was checked, the external for all SLAs would not be sent.

If Send internal/external email if missed is checked, you must setup an email event for that email to send. If there is not an email event for All or that SLA only, no one will receive an email notification.

Click **Enable** to enable it to be sent when a submission is run.

Select a Start and End status. Custom statuses will be available in the **Start Status** and **End Status** dropdowns.

The email will be sent once the submission enters the start status and remains in that status for longer than the **SLA time**.

At that point the SLA time for that status has not been met and the internal or external email that has been set up will be sent. It will be sent repeatedly according to the **Send Every** interval setup for that internal/external email until the submission enters the End Status.