

Relay Communication Hub

Version 2.4.4

Configuration Quick Start Guide



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1 - Configuring Relay Communications Hub

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

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Recommended Browsers

The following browsers are recommended for use with Relay Communications Hub:

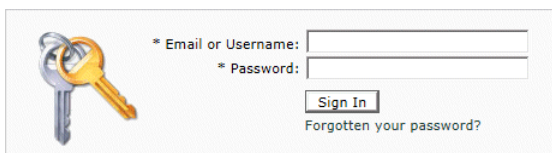
- Mozilla Firefox
- Google Chrome

In addition, Relay Communications Hub is supported on Microsoft Internet Explorer 11 - with disabling of TLS 1.1 and above.

Signing in the User Administration Website

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

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



2. Type in your **Username** and **Password**.
3. In addition, you may check the **Remember me** box. This means that if you close the browser without logging out, and open it again within seven days, your user name and password are remembered and you will not need to login.

Note:

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

4. Click **Sign in**.

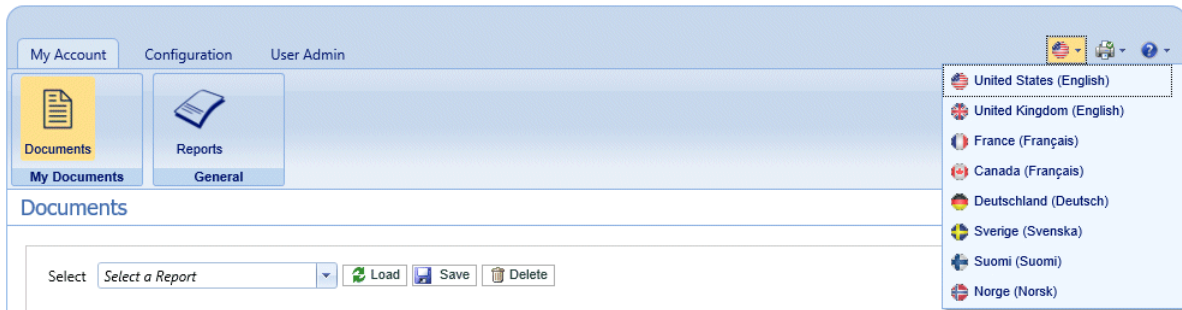
The **My Documents** page is then displayed. This is described in the next section.

Changing the display language

The website automatically detects the language in which it should be displayed from your system. If you wish to change this, follow the steps, below:

1. Click the flag in the top right of your screen.

In the example, below, this is the flag of the United States of America.

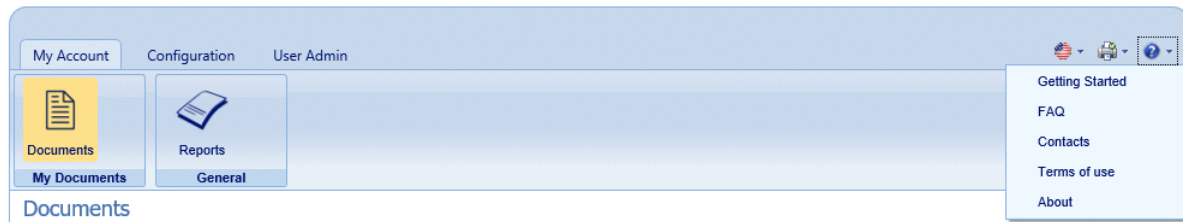


2. From the resultant menu, click your preferred language.

The menu closes, the page is displayed in the selected language and a flag denoting that language is shown.

Help and information

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



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

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

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.

Sorting tables

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

✖ Delete									
▶	☐	Authorized	Job Name	Job Reference	Date Submitted ▼	Completed Date	Pages	Job Status	Communication Type
▶		N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:16 PM	11/9/2015 2:42:45 PM	1	Completed	Emailfrompage
▶		N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:26 PM	1	Completed	Emailfrompage
▶		N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage
▶		N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:42:57 PM	1	Completed	Emailfrompage
▶		N/A	w10.2015-11-09-023905.Emailfrompagetest.pdf		11/9/2015 2:39:12 PM	11/9/2015 2:41:57 PM	1	Completed	Emailfrompage
▶		N/A	w10.2015-11-05-033720.Emailfrompage1.pdf		11/5/2015 3:37:26 PM	11/5/2015 3:40:11 PM	1	Completed	Emailfrompage
Page size: 15 Page: 1 of 2 1 to 15 of 20									

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

Filtering and searching tables

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

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

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

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

Error Messages

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

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

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

2 - Managing Attachments

Attachments are electronic documents in PDF format which are "attached" to the mail pieces in your job. The Managing Attachments function gives you the tools to upload a PDF file you have already created to Relay Communication Hub, this is then available for selection from the Attachments option of the Printer Driver, depending on the roles and permissions of the user.

PDFs must be created with no security or encryption options. Save them in optimized format in Acrobat by opening the **File** menu, choosing the **Save as** and then **Optimized PDF**.

Note: Attachments are electronic documents which differ from Pre-Printed Inserts, which are physical paper, probably leaflets or flyers, which need to be selected and placed in the envelope with the mail piece once the mail piece has been printed.

Display the page by opening the **Configuration** tab and clicking **Attachments**. The page contains a list of configured Attachments.

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

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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)

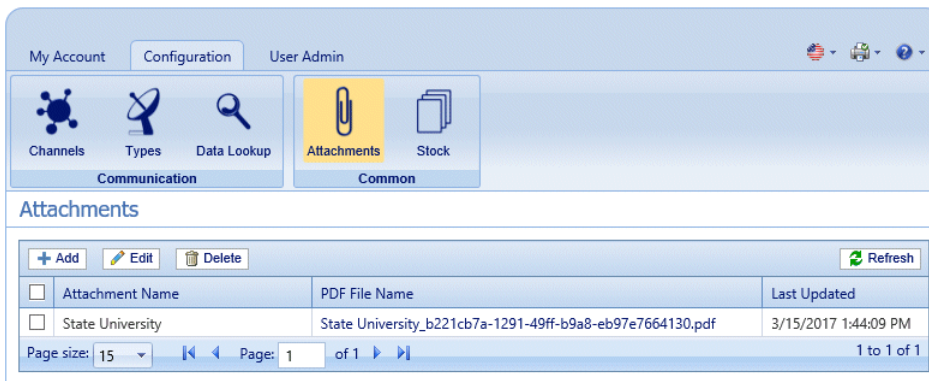
The PDFs must have been created without any security restrictions, please do not add any of the Document Security features offered by Acrobat.

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.

To add a new attachment, follow the procedure below:

1. In the **Configuration** tab click **Attachments** to display the page.



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

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

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

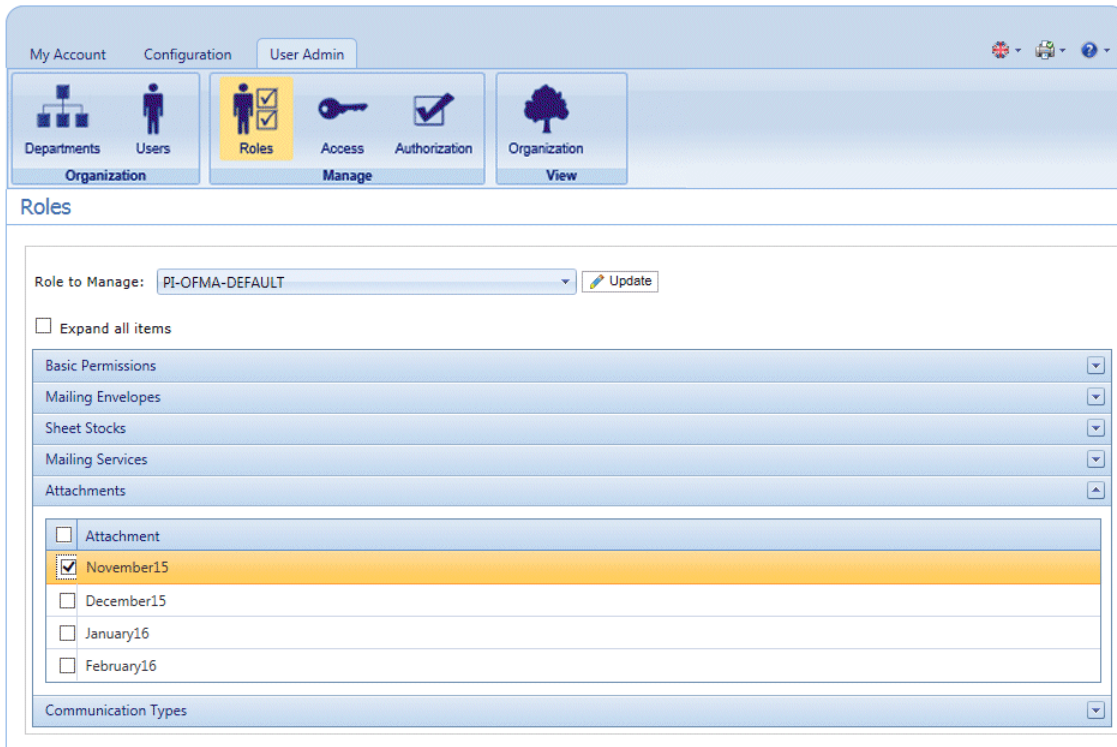
5. Select the file and click **Open**.

- Click **Add**.

The new item is now shown in the table.

- The new attachment needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.
- Click the **Roles** tool to open that page.

The **Roles** page is shown below:



- From **Role to Manage** select the correct role.
- Click **Attachments** to open a list of those available.
- Place a check mark in the box adjacent to the attachment(s) created earlier.
- Click **Update**.

Warning:

Ensure that new attachment is added to the correct role. If it is not, it cannot be used.

Editing Attachments

To edit an attachment channel, follow the procedure, below:

1. Ensure you are in the correct page, click the **Attachments** tool to open the **Attachments** page.
2. Place a check mark in the box adjacent to the required item.

This is then highlighted in the table.

3. Click **Edit**.

A window is opened containing the fields required.

4. Modify the fields as required and click **Update**.

Mandatory fields are marked with an asterisk*.

The updated item is now shown in the table.

Deleting Attachments

Note:

If you attempt to delete an attachments, a warning is displayed if the attachment is referenced by a Type. The message gives details of the Types associated with the attachment. An Attachment cannot be deleted while a Settings Group references it. To resolve this remove all Communication Type references for this Attachment.

To delete attachments, follow the procedure, below:

1. Ensure you are in the correct page, click the **Attachments** tool to open the **Attachments** page.
2. Do one of the following:
 - a) Place a check mark in the box adjacent to the required item.
 - b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
 - c) Place a check marks in the box in the header table's to select all items.

This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

3 - Managing Sheet Stock

Sheet stock (forms and overlays) are uploaded to the Relay Communication Hub Administration server. Once uploaded these files are available to Printer Driver users (dependent on their user permissions) as electronic forms. In addition, file details can be edited and the files removed from the server.

Display the page by opening the **Configuration** tab and clicking **Sheet Stock**. The page contains a list of configured stock.

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)

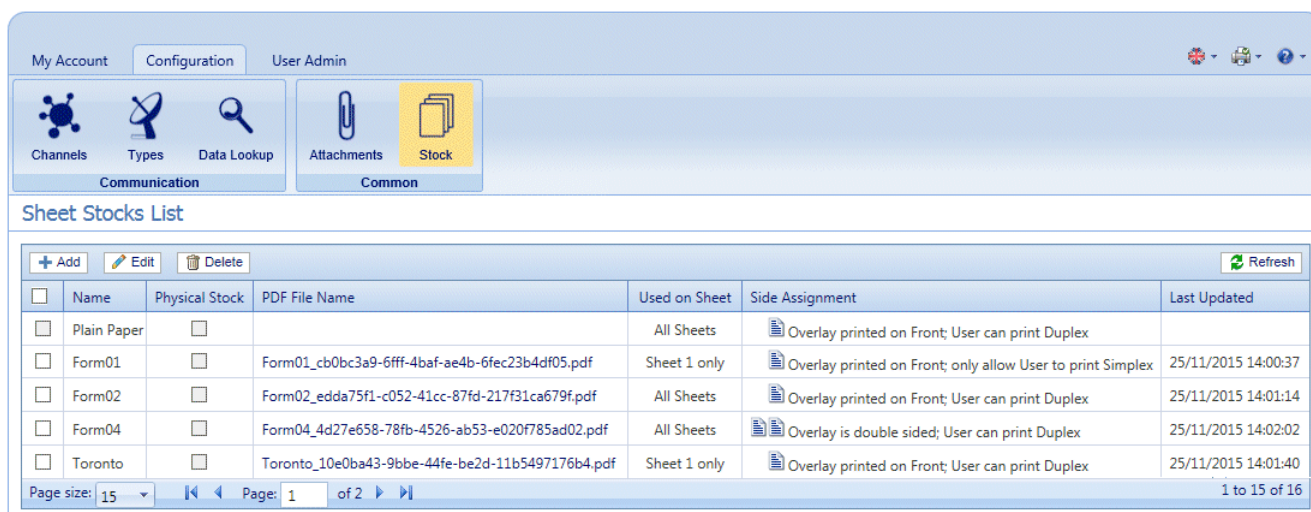
PDFs must not have any security restrictions.

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.

To add sheet stock, follow the procedure below:

1. In the **Configuration** tab click **Stock** to display the page; it contains a list of configured sheet stock.



The screenshot shows the 'Configuration' tab selected in the top navigation bar. Below it, the 'Stock' icon is highlighted in the 'Common' section. The main content area displays the 'Sheet Stocks List' table. The table has columns for Name, Physical Stock, PDF File Name, Used on Sheet, Side Assignment, and Last Updated. There are 6 rows of data. At the bottom of the table, there is a pagination bar showing 'Page size: 15', 'Page: 1 of 2', and a 'Refresh' button.

	Name	Physical Stock	PDF File Name	Used on Sheet	Side Assignment	Last Updated
☐	Plain Paper	☐		All Sheets	Overlay printed on Front; User can print Duplex	
☐	Form01	☐	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
☐	Form02	☐	Form02_edda75f1-c052-41cc-87fd-217f31ca679f.pdf	All Sheets	Overlay printed on Front; User can print Duplex	25/11/2015 14:01:14
☐	Form04	☐	Form04_4d27e658-78fb-4526-ab53-e020f785ad02.pdf	All Sheets	Overlay is double sided; User can print Duplex	25/11/2015 14:02:02
☐	Toronto	☐	Toronto_10e0ba43-9bbe-44fe-be2d-11b5497176b4.pdf	Sheet 1 only	Overlay printed on Front; User can print Duplex	25/11/2015 14:01:40

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

2. In the **Sheet Stock** page click **Add**. The window is displayed.
3. 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.
4. 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.
5. In **PDF File Name** click **Select**.
6. In the **Choose File** dialog, navigate to and select the required PDF file.
7. 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.
8. From **Side Assignment** select the required option.

Overlay printed on Front; only allow User to print Simplex	The overlay is printed on the front sides only. The user can print this document in single sided mode only.
Overlay printed on Front; User can print Duplex	The overlay is printed on the front sides only. This document can be printed single or double sided.
Overlay printed on Back; only allow User to print Simplex	The overlay is printed on the back sides only. This document can be printed single sided only.
Overlay printed on Back; User can print Duplex	The overlay is printed on the back sides only. This document can be printed single or double sided.
Overlay printed on both sides; only allow User to print Simplex	The overlay is printed on the both sides. This document can be printed single sided only.
Overlay is double sided; only allow User to print Simplex	The overlay is double sided. This document can be printed single sided only.
Overlay is double sided; User can print Duplex	The overlay is double sided. This document can be printed single or double sided.

Note: This is the only option available if Physical Stock has been selected.

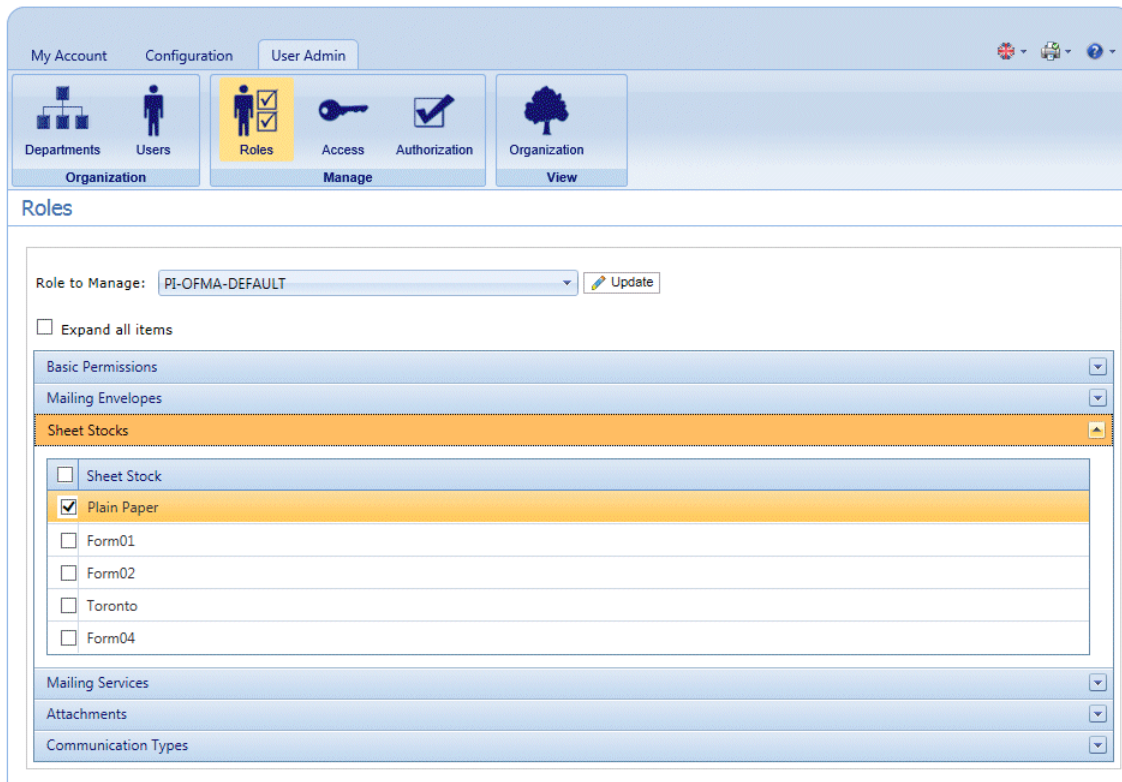
Warning: If the overlay chosen states that it is double-sided, it must be used only for double-sided (duplex) printing. Likewise, if the overlay chosen states that it is single-sided, it must be used only for single-sided (simplex) printing. Attempting to print a double-sided overlay when the printing option for your job is single-sided, or to print a single-sided overlay when the printing option for your job is double-sided in the Relay Communication Hub or Printer Driver will cause the job to fail.

9. Click **Add**.

The new item is now shown in the table.

10. The new stock needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.
11. Click the **Roles** tool to open that page.

The **Roles** page is shown below:



12. From **Role to Manage** select the correct role.
13. Click **Sheet Stock** to open a list of those available.
14. Place a check mark in the box adjacent to the attachment(s) created earlier.
15. Click **Update**.

Warning: Ensure that new sheet stock is added to the correct role. If it is not, it cannot be used.

Editing Stock

To edit stock, follow the procedure, below:

1. Ensure you are in the correct page, click the **Stock** icon in the ribbon to open the **Stock** page.

2. Place a check mark in the box adjacent to the required item.

This is then highlighted in the table.

3. Click **Edit**.

A window is opened containing the fields required.

4. Modify the fields as required and click **Update**.

Mandatory fields are marked with an asterisk*.

The updated item is now shown in the table.

Deleting Stock

To delete stock, follow the procedure, below:

1. Ensure you are in the correct page, click the **Stock** icon in the ribbon to open the **Stock** page.
2. Do one of the following:
 - a) Place a check mark in the box adjacent to the required item.
 - b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
 - c) Place a check marks in the box in the header table's to select all items.

This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

4 - Managing Communication Types

Communication types are used in the Relay Communication Hub Printer Driver to group options available. These settings are matched to jobs with similar settings; the Communication types overrides the remaining settings in the job, acting as a default of predefined criteria on which to print the job.

Use Communication Types to split pages, move text blocks, extract reference fields, automate email sending and enforce mailing options, for example, the document overrides the selections made by the user.

Your Pitney Bowes Administrator will have preconfigured your postal classes, envelope types and range of physical inserts. Please contact your Pitney Bowes Administrator to make future changes.

Display the page by opening the **Configuration** tab and clicking **Types**. The page contains a list of configured Communication Types.

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

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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		☐					

☐ And COMP001 ☐ 1 20.0 10.0 30.0 20.0

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

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**.

Enforcing options

You can use search criteria to enforce options, use the procedure given in **Adding Communication Types**.

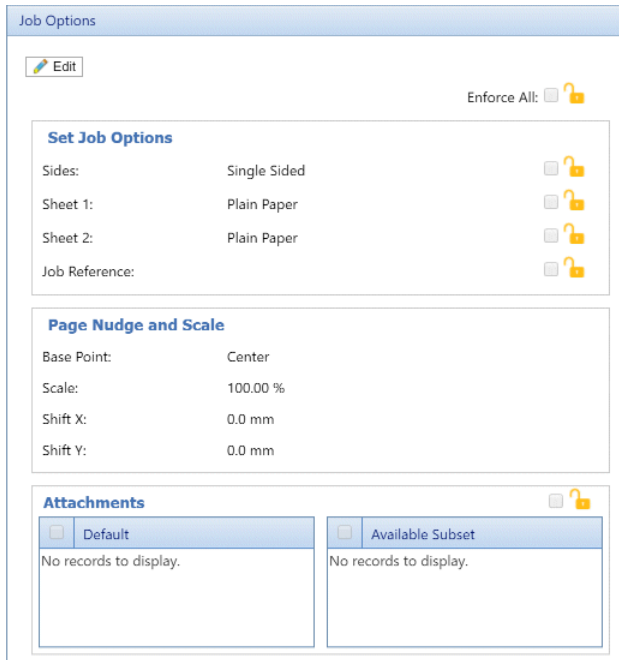
Checking these enforces the options, which prohibits changes within the Printer Driver. However, adding them here but not enforcing them allows some editing in the Printer Driver.

Leaving options unenforced presents them as the default in the Printer Driver, the user can then override them, depending on their Roles and Permissions.

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

1. Place a check mark in the box adjacent to the required Communication Type.
This is then highlighted in the table.
2. Click **Edit**.

Any of the options, shown below, with a  can be enforced.



Job Options

Edit

Enforce All: ☐ 

Set Job Options

Sides: Single Sided ☐ 

Sheet 1: Plain Paper ☐ 

Sheet 2: Plain Paper ☐ 

Job Reference: ☐ 

Page Nudge and Scale

Base Point: Center

Scale: 100.00 %

Shift X: 0.0 mm

Shift Y: 0.0 mm

Attachments

☐ Default

No records to display.

☐ Available Subset

No records to display.

3. Either:

- Click in the box adjacent to the option you need.
- Click **Enforce All** to select all options.

The icon changes to .

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

Warning:

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

Copying Communication Types

You may find it easier, as a first step to create a copy of an existing Communication Type rather than creating one in full. If you do create a copy, you must then edit it, ensuring that you make it unique and give it a unique name.

To copy a Communication type, follow the procedure, below:

My Account Configuration User Admin

Channels **Types** Data Lookup Attachments Stock

Communication Common

Communication Types

+ Add Edit Copy Delete Activate Deactivate Refresh

☐	Communication Type	Communication Channels	Authorisation Level	Order Number	Status
☐	CL001 Simplex Split		0	17	Active
☐	DLSCW - WELSH		0	3	Active
☐	AR001		0	7	Active
☐	AR003		0	9	Active
☐	DLGRW PAYMENT REQUEST		0	14	Inactive
☐	Email	@	0	2	Active
☐	Email	@	0	1	Active
☐	DLSC PAYMENT REQUEST		0	18	Active

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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 24 for descriptions of the options to modify.

See [Enforcing options](#) on page 20.

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

5. Click **Add** and in **Edit Communication Type** click **Update**.
6. The new Communication Type is available in the table. Before you can use it, it must be activated. Place a check mark in the box adjacent to it in the table and click **Activate**. The status in the table is now Active.
7. The new Communication type needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.
8. Click the **Roles** tool to open that page.

The **Roles** page is shown below:

The screenshot shows the 'Roles' page in the 'User Admin' tab. The page has a navigation bar with 'My Account', 'Configuration', and 'User Admin'. Below the navigation bar are icons for 'Departments', 'Users', 'Roles', 'Access', 'Authorization', and 'Organization'. The 'Roles' icon is highlighted. The main content area is titled 'Roles' and contains a dropdown menu for 'Role to Manage' set to 'PI-OFMA-DEFAULT'. Below this is a table of roles with columns for 'Communication Type Name' and 'Letter'. The 'Letter' column has a checkmark next to 'Letter' and 'Letter01'.

Communication Type Name	Letter
Letter	☒
Letter01	☒
Letter02	☐
Letter03	☐

9. Ensure that the correct **Role to Manage** is selected.
10. Click **Communication Types** to open a list of those available.
11. Place a check mark in the box adjacent to the Communication type created earlier.
12. Click **Update**.

The edited item is now shown in the table.

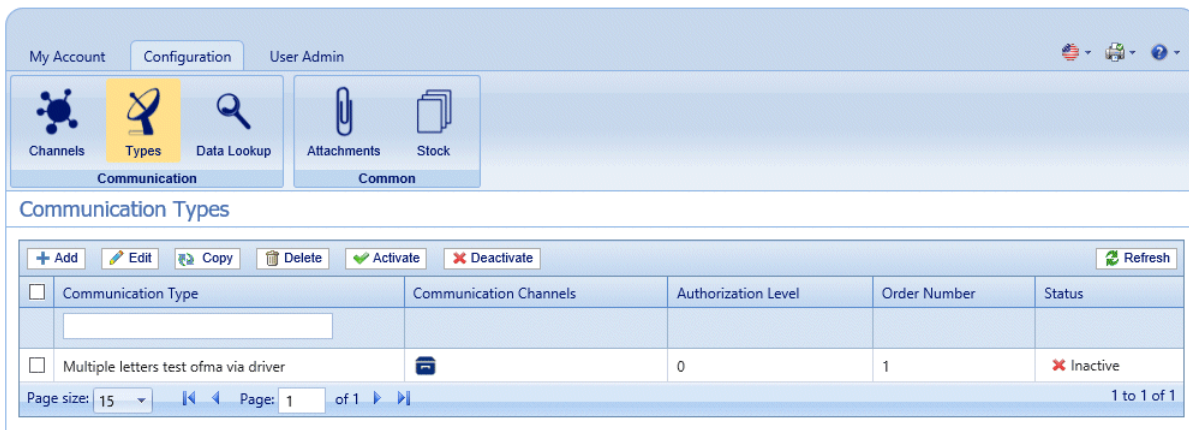
Warning:

- Ensure that new Communication Type is activated and added to the correct role, if it is not it cannot be used.
- Each new or copied Communication Type **MUST** be activated. Failure to do so means that it will not appear in the Printer Driver.
- We strongly recommend that you ensure that the Communication Type is automatically selected in the Printer Driver as described in [Testing Communications Type](#) on page 33

Adding Communication Types

The procedure below describes how to add a Communication Type with search criteria text at a specific point on the first page of a mail piece. In the example, the search criteria was found as described in [Measuring the position of the search criteria](#).

1. In the Relay Communication Hub's open the **Configuration** tab click **Types** to display the page; it contains a list of configured communication types, shown below:



The screenshot shows the 'Configuration' tab selected in the top navigation bar. Under the 'Communication' section, the 'Types' icon is highlighted. The 'Communication Types' page displays a table with the following data:

Communication Type	Communication Channels	Authorization Level	Order Number	Status
Multiple letters test ofma via driver		0	1	✗ Inactive

At the top of the table, there are action buttons: Add, Edit, Copy, Delete, Activate, Deactivate, and Refresh. The table also includes a search bar and pagination controls at the bottom.

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	▼

- Type in a name for the **Communication Type**, we recommend you use something meaningful, perhaps to indicate the purpose of this type.
- 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.
- 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.

- Click on the **Search Criteria** heading to open the panel, it is shown, below:

Search Criteria

☐	Condition	Search Text	Printer Escape Code	Side #	Top Left X	Top Left Y	Width	Height
	Condition: And	Search Text:	Printer Escape Code: ☐	Side #:	Top Left X: mm	Top Left Y: mm	Width: mm	Height: mm
+ Add Cancel								
☐	And	COMP001	☐	1	20.0	10.0	30.0	20.0
Page size: 15 Page: 1 of 1 1 to 1 of 1								

- Complete the fields as given above, for the purposes of the example we are using, these are:
 - Search Text: Smith12345
 - Side #: 1

- Top Left X: 260 mm
- Top Left Y: 20 mm
- Height: 7 mm
- Width: 30 mm

The measurements do not need to be precise, you just need to ensure that the box will contain the search criteria text on each mail piece.

- Click **Add** and in **Edit Communication Type** click **Update**.
- A **Communication Channel** must be specified for the Communication Type. Some default Channels are available. Click the Communication Channels heading to open the table, shown below:

The screenshot shows the 'Channels' dialog box. It features a table with the following structure:

Type	Communication Channel	Enforced	Send
☐	Default Print Channel	☐	☐
☐	Today	☐	☐

Below the table, there are sections for 'Options' and 'Pre-printed Inserts'. The 'Options' section includes dropdowns for 'Postal Address' (Extract from Envelope Window), 'Colour' (Black and White), 'Mailing Service' (First Class), and 'Mailing Envelope' (C5). The 'Pre-printed Inserts' section has two tabs: 'Default' and 'Available Subset', both showing 'No records to display.' At the bottom are '+ Add' and 'Cancel' buttons.

- Select the required **Communication Channel** from the list.
- Select all the other options you need. Click on a link, below, for descriptions.
 - [Splitting a job](#) on page 28
 - [Moving items](#) on page 29
 - [Extracting fields](#) on page 30

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

See [Enforcing options](#) on page 20.

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

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

13. The new Communication Type is available in the table. Before you can use it, it must be activated. Place a check mark in the box adjacent to it in the table and click **Activate**. The status in the table is now Active.
14. The new Communication type needs to be added to a role. To do this open the **User Admin** tab at the top of the screen.
15. Click the **Roles** tool to open that page.

The **Roles** page is shown below:

The screenshot shows the 'Roles' page in the 'User Admin' tab. The page has a navigation bar with 'My Account', 'Configuration', and 'User Admin'. Below the navigation bar are icons for 'Departments', 'Users', 'Roles', 'Access', 'Authorization', and 'Organization'. The 'Roles' icon is highlighted. The main content area is titled 'Roles' and contains a 'Role to Manage' dropdown set to 'PI-OFMA-DEFAULT' with an 'Update' button. Below this is a checkbox for 'Expand all items'. A list of communication types is shown with checkboxes: 'Basic Permissions', 'Mailing Envelopes', 'Sheet Stocks', 'Mailing Services', 'Attachments', and 'Communication Types'. Under 'Communication Types', 'Letter' is checked, 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 33

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 24. 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 24 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 24. 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.

3. In **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 item to move.

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

5. In **Top Left Y** type in the top left coordinate of the item to be moved.
6. In **Width** type in the width of the item to be moved.
7. In **Height** type in the height of the item to be moved. You have now defined the perimeter of the item.
8. You need to define the location to which the item is to be moved. In **New Top Left X** type in the top left coordinate of the new location.
9. In **New Top Left Y** type in the top left coordinate of the new location.
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 24 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 24. 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 31.
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 31.

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 24. Once you get to step #11, you can set these options as described, below:

1. From within the required Communications Type click the **Job Options** heading to open the panel.
2. In **Job Options** click **Add** to open the following panel:

Job Options

Enforce All: ☐

Set Job Options

Sides: ☐

Sheet 1: ☐

Sheet 2: ☐

Job Reference: ☐

Page Nudge and Scale

Base Point:

Scale: %

Shift X: in

Shift Y: in

Attachments

Default	Available Subset
☐ State University	☐ State University

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 30. 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. If you need to move the paper in the printer where the job is printing too close to one margin, you can nudge it by specifying the following options:
 - **Base Point** - change the point from which the nudge is calculated.
 - **Shift X** - move the page horizontally by this measurement from the base point.
 - **Shift Y** - move the page vertically by this measurement from the base point.
9. If you need to make the contents on the page larger or smaller, use the **Scale** option. The default setting is 100%, which is the size that contents are usually printed. Decrease this setting to make the contents smaller and increase this setting to make the contents larger.

Warning: Decreasing this setting may cause the page contents to become unreadable. Increasing this setting may cause the contents to be too big to fit on the page.

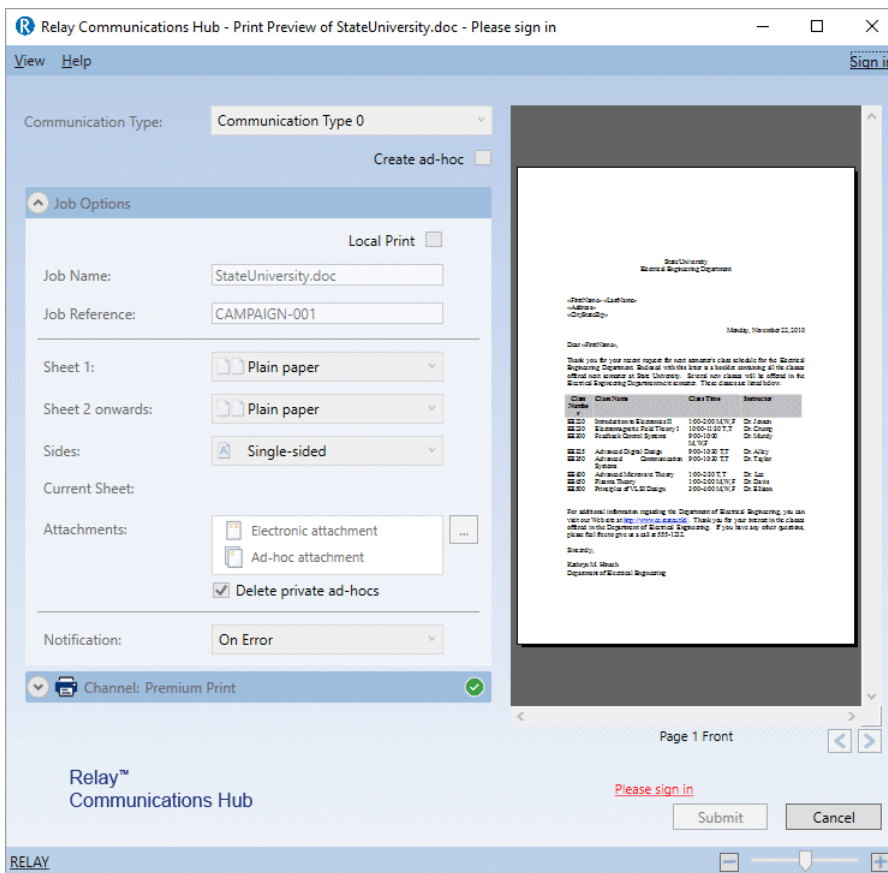
10. From **Attachments** select the electronic attachments you wish to make available to the user.
11. From **Insets** select the physical inserts you wish to make available to the user.
12. Select any options you wish to enforce or select **Enforce All**. This will ensure that they are automatically selected in the Printer Driver and will not allow the user to make another selection.
13. Click **Update**.
14. Return to **Adding Communication Types** on page 24 step# 12 to complete this procedure.

Testing Communications Type

We strongly recommend that you test each new or copied Communication Type to ensure that it appears as the default selection in the Printer Driver.

To do this, follow the procedure, below:

1. Print your document through the Printer Driver, shown below.



2. Sign in to the Printer Driver.
3. Check that the **Communication Type** has been automatically selected.

If the **Communication Type** has not been automatically selected, return to the **Communication Types** page and amend the settings.

Note: Leaving the document open within the Printer Driver allows you to see the changes you have made, without having to resubmit the document each time. You may need to sign in again.

Deleting Communication Types

If you wish to temporarily discontinue use of a Communication Type consider deactivating it instead. This is done by selecting the required communication type(s) and clicking **Deactivate**.

To delete types, follow the procedure, below:

1. Ensure you are in the correct page, click the **Types** tool to open the **Communication Types** page.
2. Do one of the following:
 - a) Place a check mark in the box adjacent to the required item.
 - b) Hold **Shift** and place check marks in the boxes adjacent to the required items.
 - c) Place a check marks in the box in the header table's to select all items.

This is then highlighted in the table.

3. Click **Delete**.
4. A window is displayed asking for confirmation, click **OK**.

The item(s) is removed from the table and are no longer available for use.

5 - Glossary

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

In this section

Terms and Definitions

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Terms and Definitions

Attachments	A PDF file uploaded into Relay Communications Hub and selected in the Printer Driver. This is attached to each mail piece in the job at the time of printing, mailing or archiving.
Communication Channels	Defines how Relay Communications Hub outputs the job. This can be one, all or any combination of Archive, Email and Print.
Communication Types	A group of settings which define how the mail pieces in your job are processed. The first setting is Communication Channel, these are printing, emailing and archiving, these can be sub divided into other groups, for example, whether the job is printed in color and black and white.
Role	A group of settings which define user permissions and access to parts of the user interface and facilities.
Mailing Envelopes	Envelopes in which printed mail pieces are inserted for mailing. These are usually defined by physical size.
Mailing Services	The service used to send printed mail pieces.
Pre-Printed Inserts	A physical published document inserted into the envelope with the mail piece at the time of printing.
Sheet Stock	In the case of Physical stock, this is the paper on which mail pieces are printed. Otherwise, this is a PDF of headed paper or a form which is overlayed onto the mail pieces.
Side Assignment	The side or sides on which the Sheet Stock appears.
Search Criteria	The criteria for which an item on a page is found. This item, which could be an account or invoice number can then be used to identify the first page in a mail piece and then be used to identify the first pages in all mail pieces. In addition, it can be used to identify mail pieces to specific recipient.

6 - Information

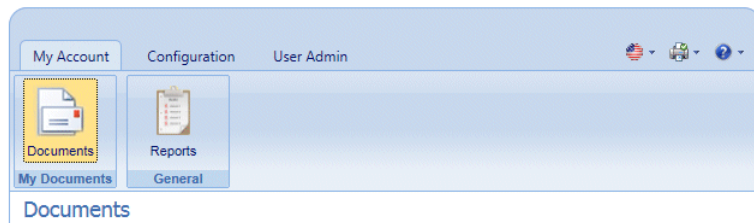
This section provides information on Pitney Bowes and where to find more information on this product.

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Configuration and User Administration

When you log into the **My Documents** web site, you may find that a number of other tabs are available to you. These require special permissions, if you do not have these, you will not be able to see the tabs:



The **Configuration** and **User Admin** tabs are described in the Relay Communications Hub User Website Administration Guide, which has all the information you need to configure your system.

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