



Shipping and Mailing

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

Version 2.4.4

Print Manager Print Room Operator Guide



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# 1 - About This Guide

This guide describes the operation of Relay Communications Hub's My Print Streams website. This is intended to be used by Print Room operators who receive jobs for printing and set the printers and inserters running. There are two operator roles, by following the procedures given in this guide you will be able to:

## **Operators:**

- See an overview your incoming Print Streams
- Drill down into Bundles
- View bundle triggers
- Trigger bundles to print
- Release Print Streams for printing
- View released Print Streams, sorting and refining those shown in addition to seeing and confirming their status
- View and export job reports
- Download a Print Stream
- Mark a job as printed
- Create and download Job Reports
- Use the Desktop Client

**Chief Operators**, who in addition to the above are able to:

- Define bundles
- Create triggers

In addition, the use of Relay Communications Hub's Job Reports and the Desktop Client are described.

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## Version History

| Date          | Version | Comments                                                                                                                                                                          |
|---------------|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| July 2016     | 2.0     | Initial Version                                                                                                                                                                   |
| October 2016  | 2.0     | New "mailed" option, updated icons, banner pages, select multiple inserts.                                                                                                        |
| January 2017  | 2.1     | New processing status in Released Print Streams.                                                                                                                                  |
| April 2017    | 2.2     | Deleting a job.                                                                                                                                                                   |
| August 2017   | 2.3     | New error tracking functionality in the Job Details-Print tab.                                                                                                                    |
| February 2018 | 2.4     | Updated user Interface. New <b>About</b> option in the user menu.                                                                                                                 |
| October 2018  | 2.4.1   | Added: <ul style="list-style-type: none"> <li>• TrackMyMail reference</li> <li>• Interface navigation overview</li> <li>• Password Expiry</li> <li>• Updating Software</li> </ul> |
| January 2020  | 2.4.4   | <ul style="list-style-type: none"> <li>• Version upgrade only</li> </ul>                                                                                                          |

## Related Documentation

| Document Name            | Date         | Comments                                                  |
|--------------------------|--------------|-----------------------------------------------------------|
| Print Manager User Guide | October 2018 | Describes the user functions of Relay Communications Hub. |

| Document Name                     | Date         | Comments                                                             |
|-----------------------------------|--------------|----------------------------------------------------------------------|
| Print Manager Administrator Guide | October 2018 | Describes the administration operations of Relay Communications Hub. |
| Print Manager User Guide          | October 2018 | Describes the operation of Relay Communications Hub Web Client.      |

## 2 - Overview

The Relay Communications Hub gives print room operators control of print streams by providing the ability to group jobs with common attributes into a single print stream. This print stream can be set to automatically be released to either hot folder or a configured printer when a maximum number of pages or mail pieces has been exceeded or at a specified time of day. This means that a large volume of mail pieces may be printed in on session, thereby reducing the need to reset and refill printers with different paper and inserters with different envelopes and inserts. The object of Relay Communications Hub is to reduce printer down time by maximizing the through put of mail pieces requiring the same stationary. In addition, postal discounts are easily obtained for the high volumes of mail created.

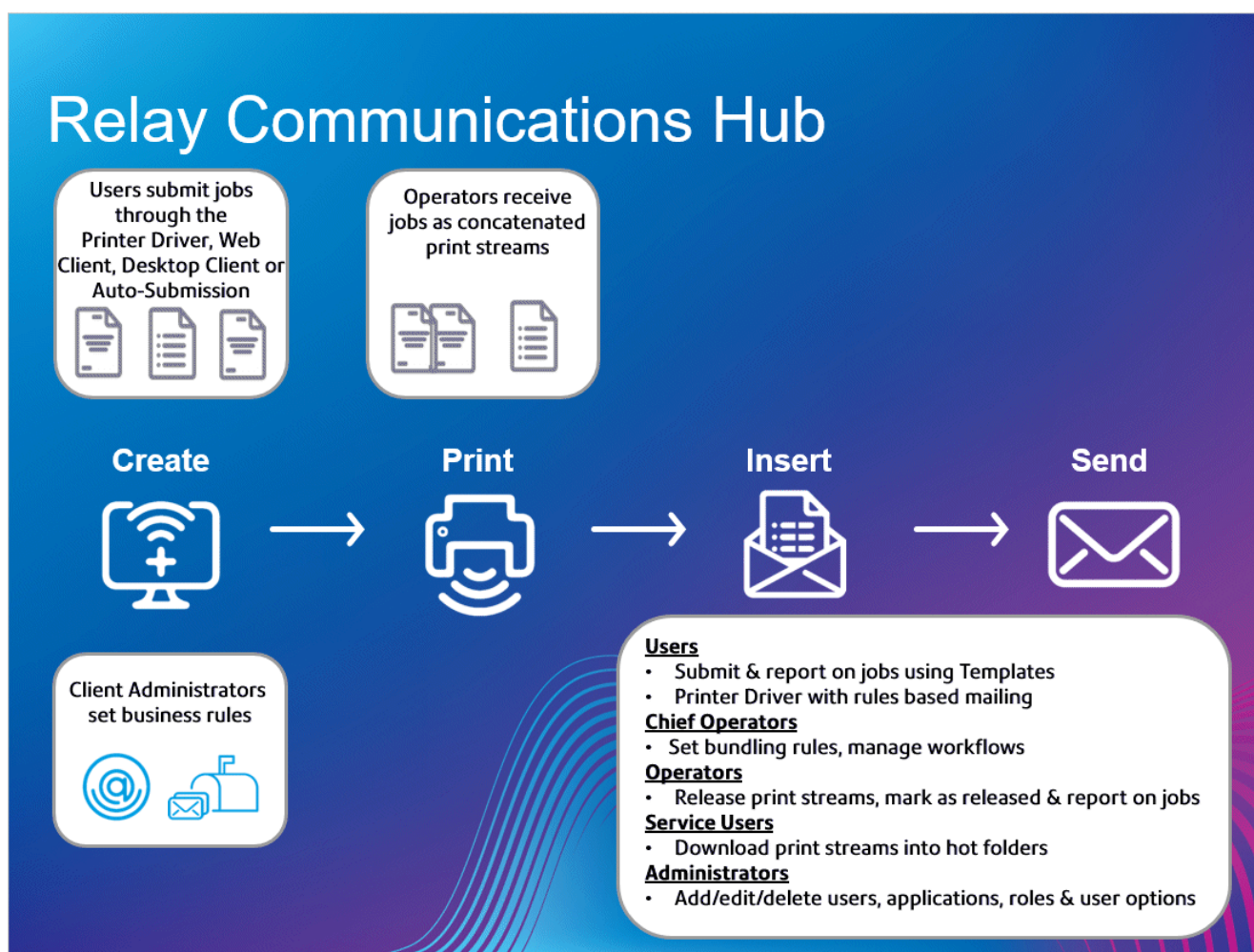
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## Relay Communications Hub's work flow

The following diagram illustrates Relay Communications Hub's work flow.



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

### Mail pieces

Users create mail pieces (the letters sent out to customers), which are individual documents or mail merged created in Microsoft Word and then:

- Submitted to Relay Communications Hub through the Printer Driver
- PDFed and uploaded to Relay Communications Hub through the Printer Driver or an auto submission hot-folder

This Microsoft Word Document or PDF is known as a job.



**Jobs**

A mail merged Microsoft Word or PDF file containing multiple mail pieces.

---

**Print streams**

Print streams are the jobs submitted by users concatenated, or grouped by common attributes, such as paper size, envelope size, color printing. Chief operators create bundles which define these common attributes and as each job reaches Relay Communications Hub it is added to the print stream matching attributes. The Chief Operator sets triggers for each print stream, specifying the criteria at which print streams are automatically released for download to hot folders, or if configured, printers.

Operators are responsible for loading the required paper on to the printers and the envelopes and inserts into the inserts. They oversee the printing and mailing of the print streams and then mark them as printed in the **Released Print Streams** page of Relay Communications Hub. This print confirmation is shown in the user's **Job Reports** page, so that they can see that their job is complete.

---

**Bundles**

A bundle is a group of attributes which define a print stream, for example, color, page size. The name of the bundle is automatically generated when the bundle is created and is made up of the attributes selected. For example:

C5, Duplex, Black & White, A4, 2nd Class, No Insert

This bundle has grouped together all jobs which are to be printed double-sided (duplex), on A4 paper and to be posted in a C5 envelope as 2nd class without the inclusion of pre-printed inserts.

---

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

## Relay Communications Hub roles

There are five types of role:

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

### Users

Submit their jobs to Relay Communications Hub through one of the following methods:

- printing a job through the Printer Driver
- merging more than one job when printing through the Printer Driver
- creating a job in the Web Client
- dragging and dropping a job into a hot folder provided by the Desktop Client

### Operators

Undertake the following tasks:

- Drag and drop or automate the transfer of concatenated print streams from a download folder onto their printer(s). (This is the primary action. The operator will manually release print streams by exception)
- manually release print streams to download
- physically load and set printers and inserters
- oversee printing and mailing
- mark jobs as printed and mailed
- deleting jobs
- deleting jobs from printstreams
- deleting "Other" bundles

### Chief Operators

Undertake the following tasks:

- define bundles by setting criteria by which jobs from all submitting users are concatenated into a single print stream

- define bundle triggers which will automatically release print streams for download to a printer when they reach a maximum number of pages or at specified time of day

This document has been created with both kinds of Operator in mind, the functionality in each section states the intended operator type.

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

## Service User

There is only one Service User, who is named during the establishment of your Relay Communications Hub system. The Service User may hold an additional role, this is most likely to be Chief Operator or Operator.

Undertake the following tasks:

- Download the Desktop Client
- Use the Relay Communications Hub desktop client's hot folders to automatically process files
- Downloads print streams through the Desktop Client.
- Create, upload and download a job
- View reports on completed jobs
- If a reprint is required for any downloaded printstream, the Service User can drop that PDF in to the corresponding workflow folder in \Upload, the PDF is then considered to be a new job.

## Administrators

Undertake the following tasks:

- Create users and departments
- Define your organization by creating departments and assigning users
- Manage roles
- Manage access pools
- Manage authorization pools
- View your organization
- Manage attachments
- Manage sheet stock
- Manage communication types
- Manage Templates
- View reports on completed jobs
- Upload a data file to the Relay Communications Hub Client
- Apply a Template to that file
- Download the resulting PDF and related files

- View and download reports on completed jobs
- Manage user access
- Invite others to use Relay Communications Hub
- Download the Desktop Client
- Use the Desktop Client's hot folders to automatically process files
- Configure the Auto-submission Console
- Use the Auto-submission Console's hot folders to automatically process files
- Use the Auto-submission Console's hot folders to track failed jobs

## My Print Streams

Once you have signed in to Relay Communications Hub the following is shown:

Relay Hub

Create a Job

Job Reports

My Print Streams

?

⚙

Relay Admin

Print Streams

View Released Print Streams

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

In this page the following information is displayed:

### Bundle

A bundle is group attributes which define a print stream, for example, color, page size. The name of the bundle is automatically generated when the bundle is created and is made up of the attributes selected. For example:

C5, Duplex, Black & White, A4, 2nd Class, No Insert

This bundle has grouped together all jobs which are to be printed double-sided (duplex), on A4 paper and to be posted in a C5 envelope as 2nd class without the inclusion of pre-printed inserts.

### Jobs

Jobs are submitted by users and consists of a number of mail pieces/letters. Letters may have been mail merged within Microsoft Word and submitted to Relay Communications Hub through the Printer Driver. This column gives the number of jobs in this print stream, which increases as jobs with the same attributes are submitted. You can click on the number of jobs in a print stream to show its status and list the jobs it contains.

|                     |                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Mail Pieces</b>  | Each job can be made up of a number of mail pieces. For example, mail pieces are the individual letters in a mail merged job. This is the total number of mail pieces in the print stream.                                                                                                                                                                                                                     |
| <b>Pages</b>        | The total number of pages within the print stream.                                                                                                                                                                                                                                                                                                                                                             |
| <b>Next Trigger</b> | These are the conditions defining when the print stream is next released to the download folder and can be manually or automatically sent to a printer. Where this is shown as No times defined, the trigger executes when the specified number or mail pieces or pages has been reached. Where this is shown as No triggers defined, the print stream must be triggered manually or an automatic trigger set. |
| <b>Trigger Now</b>  | You can manually trigger print streams if the  is available.                                                                                                                                                                                                                                                                  |

The total number of jobs, mail pieces and pages is given for all print streams.

In the example, above, the bundle **Other** contains all jobs for which a bundle has not been defined.

## Navigating through Relay Communications Hub

Many of the pages within Relay Communications Hub will generate more information than can be displayed on one page. In these cases, the following controls enable you to navigate to the information you need.

- Click within the  to change the number of items shown
- Click the single arrows in  to move forward or backward by one page. The current page number is shown in the blue box
- Click the double arrows in  to move to the first or last page. The current page number is shown in the blue box
- [Filter the print streams shown by bundle name](#)
- [Filter the print streams shown by date](#)
- [Sort Jobs](#)
- [Search for jobs](#)

# 3 - Getting Started

This section describes how to open and log into the Relay Communications Hub.

## In this section

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## Recommended Browsers

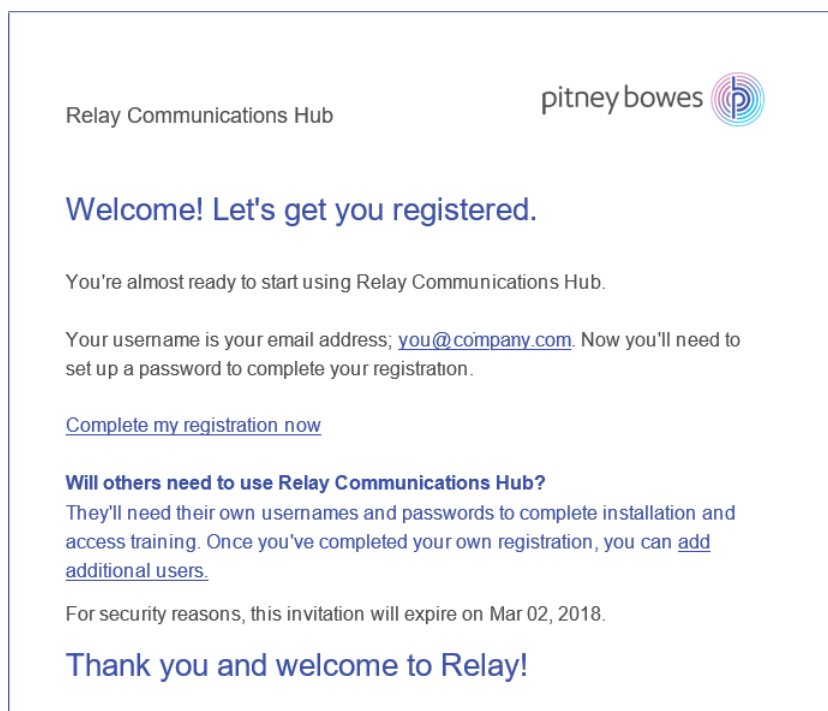
The following browsers are recommended for use with Relay Communications Hub:

- 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 For The First Time

All users receive an automatically generated email, shown below:



You need to complete the procedure below, to complete registration and set a password for your account.

The email contains a link, , which takes them to the Relay Communications Hub website.

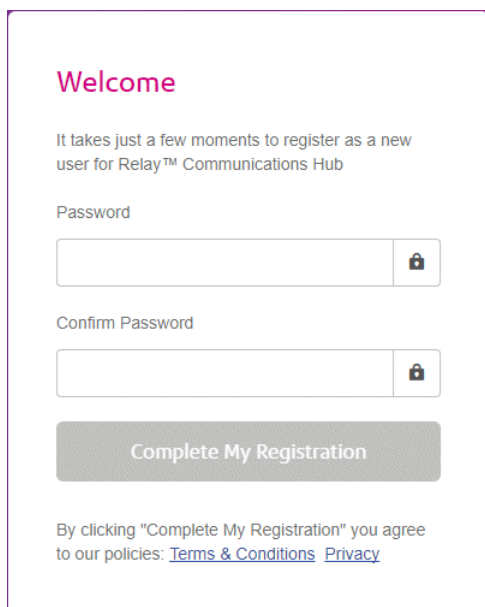
They then need to create and confirm a password, as described in [Forgotten your password?](#) on page 19



A message is displayed confirming successful registration and the user is shown in the **Users** page with a status of Active.

1. In the above email, click the link "Complete my registration now".

This opens the website, shown below:



The image shows a registration form titled "Welcome" in pink. Below the title, it says "It takes just a few moments to register as a new user for Relay™ Communications Hub". There are two password input fields: "Password" and "Confirm Password", each with a toggle icon for visibility. Below these fields is a grey button labeled "Complete My Registration". At the bottom, a disclaimer states: "By clicking 'Complete My Registration' you agree to our policies: [Terms & Conditions](#) [Privacy](#)".

2. Type in the **Password** you wish to use for this account.

Your password needs to have the following:

- at least eight characters
- at least one upper-case letter
- at least one lower-case letter
- at least one number
- at least one special character, such as @ # \$ \_

We strongly recommend that you do not use your personal information, for example, your name, user name, address, your company's name, date of birth, phone number, license plate number.

3. Type in the password in **Confirm Password**.
4. Click **Complete My Registration**.

The website opens, displaying the areas to which you are allow access.

You only need to do this once, see [Subsequent Signing In](#) on page 18

## Subsequent Signing In

You will be provided with credentials with which you can sign into both the User website by Pitney Bowes.

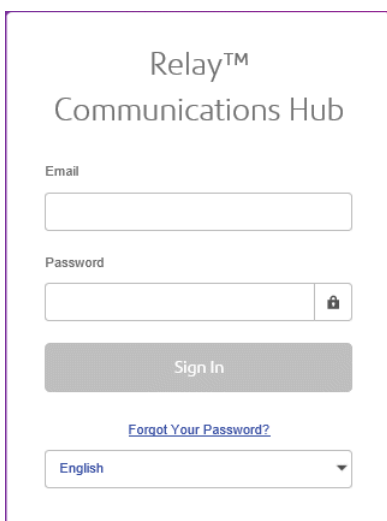
To sign in to follow the procedure below:

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



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

**Warning:** It is of the utmost importance that you change your password to something more secure as soon as possible. You risk attack by outside agencies if you fail to do so.

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

**Note:**

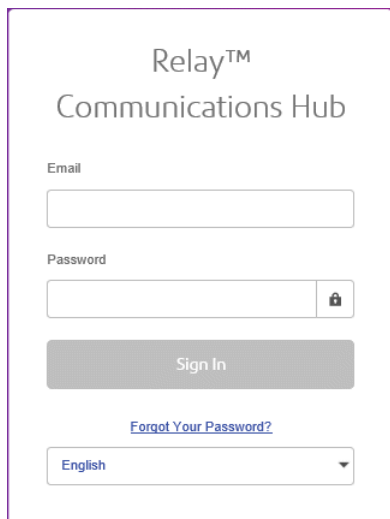
After six incorrect sign in attempts you are locked out of the website for ten minutes. After this time, use the **Forgotten your password** facility to reset your sign in credentials.

4. Click **Sign in**.

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

## Forgotten your password?

The sign in page is shown below:

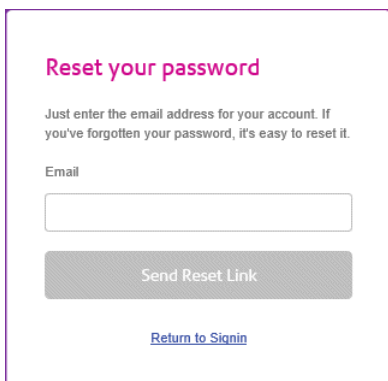


The image shows the sign-in page for the Relay Communications Hub. It features the Relay™ logo and the text "Communications Hub" at the top. Below this are two input fields: "Email" and "Password". The "Password" field has a small lock icon to its right. A "Sign In" button is positioned below the password field. Below the button is a link that says "Forgot Your Password?". At the bottom, there is a language selection dropdown menu currently set to "English".

If you have forgotten your password, follow the procedure below:

1. Click **Forgotten Your Password?**

This opens the following:



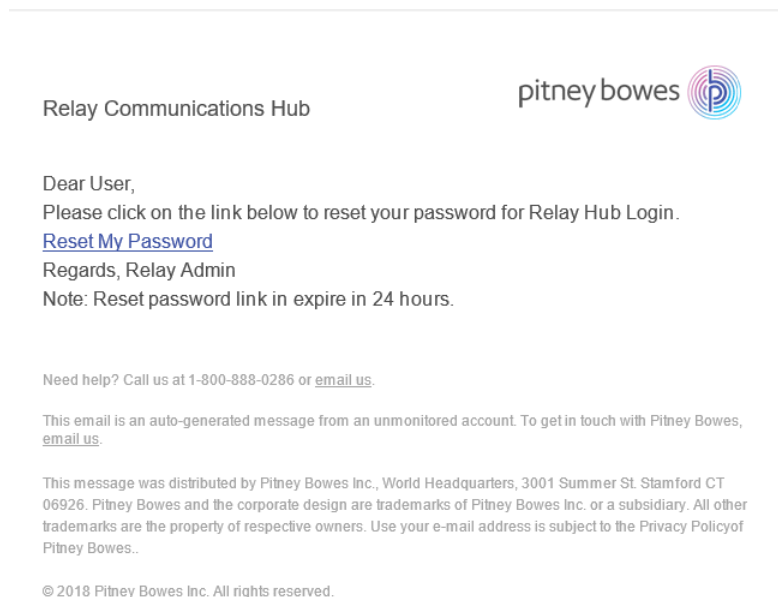
The image shows the "Reset your password" page. It has a heading "Reset your password" in pink. Below the heading is a short instruction: "Just enter the email address for your account. If you've forgotten your password, it's easy to reset it." There is an "Email" input field. Below the input field is a "Send Reset Link" button. At the bottom, there is a link that says "Return to Signin".

2. Type in your registered email address.
3. Click **Send Reset Link**.

A message is displayed advising that an email link has been sent.

4. Check your email.

The reset password email is shown below:



5. In the email click **Reset My Password**.

The following is opened:

A screenshot of a web form titled 'Reset your password' in pink. Below the title, it says 'You're updating the password for kelly.ufland@pb.com.' There are two input fields: 'New Password' and 'Confirm Password', each with a password icon (a lock) to its right. At the bottom of the form is a blue 'Submit' button.

**Note:** For security reasons, you cannot use any of your last five passwords.

**Note:** See [Signing In For The First Time](#) on page 16 for a list of password criteria.

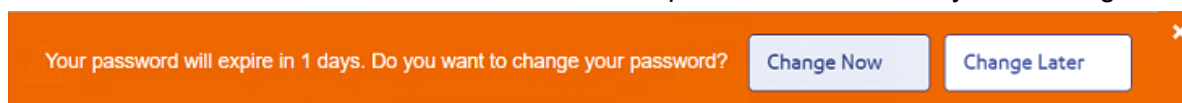
6. Type in your **New Password**.
7. Type in the same value for **Confirm Password**.
8. Click **Submit**.

Your password is changed and you are taken to the **Sign In** page.

## Password Expiry

A password expiration policy may have been set by your system administrator, it defines the number of days after which your password will expire in addition to the number of days before expiration on which you will begin to be notified that this will happen.

The notification is shown as a banner across the top of the window once you have signed in.



1. Either click:

- **Change Later** to continue with the sign in and open the website or
- **Change Now** to continue as follows:

If you clicked **Change Now**, the following is opened:

A form titled "Reset your password" in pink. Below the title, it says "You're updating the password for gyanserviceuser@maildrop.cc." There are three password input fields: "Old Password", "New Password", and "Confirm Password". Each field has a lock icon on the right. At the bottom, there are two buttons: "Submit" (dark blue) and "Cancel" (light blue).

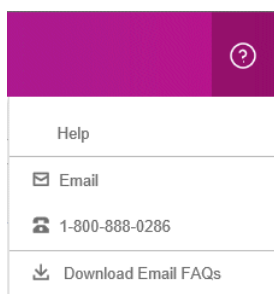
2. Complete the field as shown.
3. Click **Submit**.

If you choose not to change your password when the notification appears, then it is shown every time you attempt a sign in until the password is reset. If you have not reset your password before it expires, you are taken to the **Reset your password** dialog as soon as you attempt to sign in.

If you are using the Desktop Client you will receive an email notification if your password expires. In addition, an email is sent to your manager.

## Help

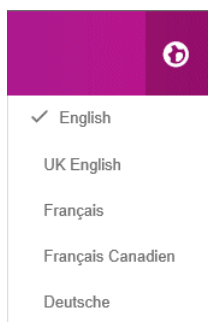
Clicking  in the top right of the window opens a menu, as follows:



If you are experiencing any problems, dial the number to contact Pitney Bowes.

## Changing the display language

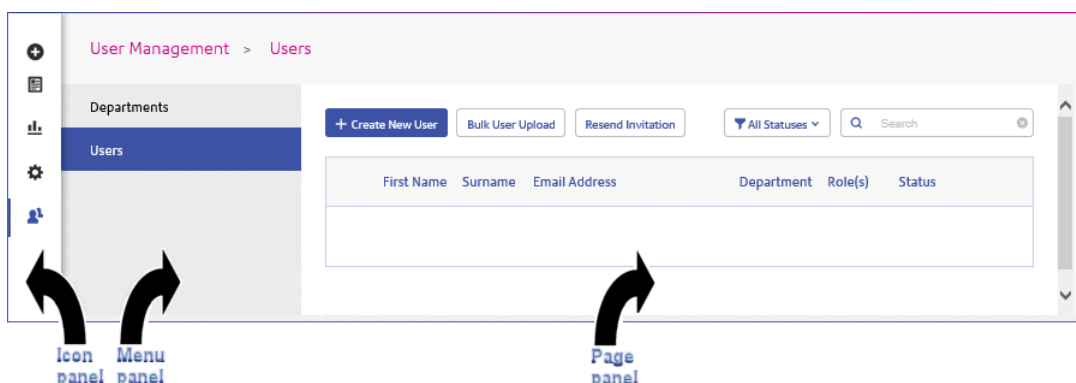
Relay Communications Hub automatically detects the language in which it should be displayed from your system. If you wish to change this, click  in the top right of your screen, the menu is shown below:



Click your preferred language. The menu closes, the page is displayed in the selected language. The next time you sign in Relay Communications Hub is displayed in the selected language.

## Navigating The User Interface

When you have signed in the User Interface is shown:



To open a page, click the required icon in the Icon panel and select a menu option to open the page. In the example, above, the following have been selected:

 to open the **User Management** menu and **Users** to open the **Users** page.

## Navigation Icons and Menus

The User Interface's Icon panel options and menus are listed below:

### Reports

Clicking  opens the **Reports** page, this has no menu panel.

The functions of this page are described in [Viewing Job Reports](#)

# 4 - Managing Bundles and Triggers

This section is for Chief Operators and describes how to define bundle criteria. Jobs received from submitting users are concatenated into a print stream by bundle criteria, that is, a group of similar attributes, for example, jobs may be bundled based on criteria such as:

- Envelope size
- Mail class
- Paper on which the jobs are to be printed
- Whether the job are printed as single- or double-sided
- Whether the job are printed in color or black and white
- Whether a common insert is required

These print streams may then be released to download to a Relay Communications Hub hot folder, and where configured a printer, automatically, as described in [Defining Triggers](#) on page 27 or [manually released](#) for download.

## In this section

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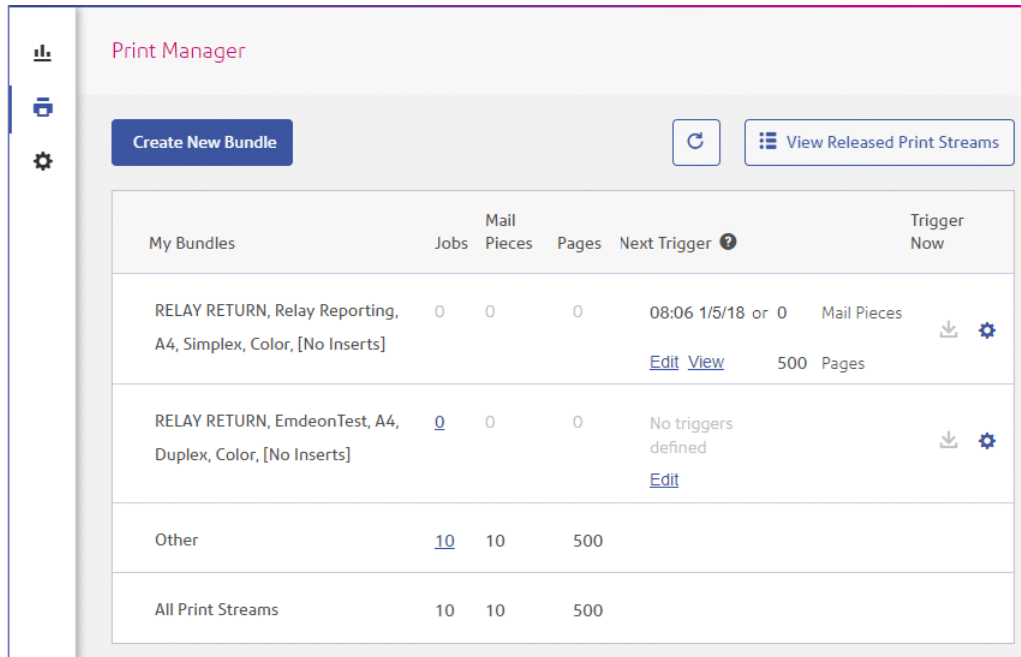
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## Creating a new bundle

**Note:** This function is only available to Chief Operators.

When you first sign in the following is displayed:



To define a bundle, follow the procedure, below:

**Note:**

Once you have made a selection from the options given in the screen the **Bundle Name** begins to be filled. The bundle name is made up of the selections you make in this window. For example, selecting **C5** from **Envelope** also specifies the first part of the bundle name as C5. An example bundle name is:

**C5, 2nd Class, A4, Simplex, Black & White, Insert 1**

where:

|            |           |
|------------|-----------|
| Envelope   | C5        |
| Mail Class | 2nd Class |
| Paper      | A4        |

|        |               |
|--------|---------------|
| Plex   | Simplex       |
| Color  | Black & White |
| Insert | Insert 1      |

**Note:** The bundle named **Other** catches all jobs which do not conform to the attributes collected by the bundles listed above it. These jobs are not concatenated and may not build up sufficient volume to merit manual release.

1. Click **Create New Bundle**.

This opens the following:

Create New Bundle

Envelope <sup>\*</sup> Mail class <sup>\*</sup> Paper <sup>\*</sup>

Select Select Select

Plex <sup>\*</sup> Color <sup>\*</sup> Inserts <sup>\*</sup>

Select Select Select

Accumulation Workflow <sup>\*</sup>

Select

Bundle Name

Name of the Bundle

Save Cancel

**Note:** An option must be specified for all fields.

2. From **Envelope** select the size of the envelope in which the printed mail pieces is to be inserted, for example, C5, DL.

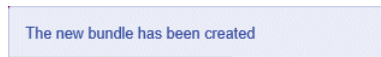
3. From **Mail Class** select the class of mail by which the mail pieces is to be sent, for example, 1st Class, 2nd Class..
4. From **Paper** select the paper on which the mail pieces is to be printed, for example, size: A4, A4 pre-printed letter head.
5. From **Plex** select whether the mail pieces are to be printed single- or double-sided, that is, simplex, duplex.
6. From **Color** select whether the mail pieces are to be printed in color or black and white.
7. From **Inserts** select the inserts to be included with the mail pieces in its envelopes.
8. From **Accumulation Window** select the accumulation window in which this bundle is to appear.
9. Once you have made your required selections, click **Save**.

**Note:** An error message is displayed a bundle with the same criteria exists.

10. If you wish to define a trigger for this bundle, which automatically releases the print stream for download, click **Edit** in the **Trigger** column for the bundle.

This opens the **Edit Trigger** page, see [Defining Triggers](#) for instructions on its use.

The following message is displayed in the top right corner of the page:



The new bundle is shown in the **My Bundles** page.

## Defining Triggers

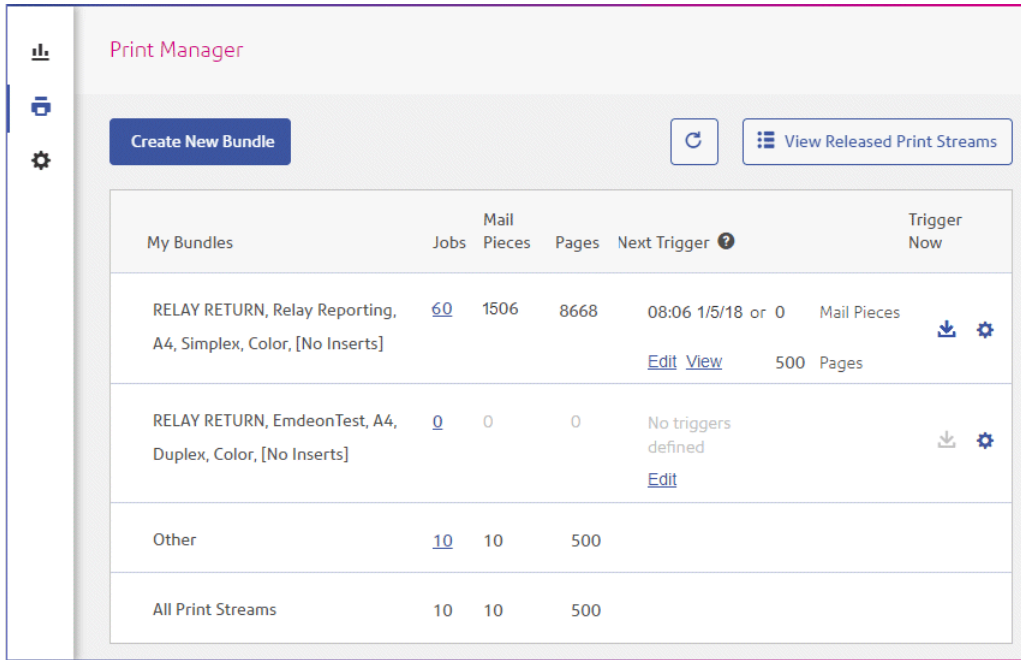
**Note:** This function is only available to Chief Operators.

This section describes how to create, edit and review the criteria on which Bundled jobs are triggered, that is, when they are released for downloaded to the to printer.

Bundle triggers fall into two categories:

- Released when a specified number of pages or mail pieces in the print stream has been exceeded
- Released at a specified time

You may create triggers in which both time and volume are defined. In addition, you may specify exceptions in the trigger so that print streams are not released at specific times, for example, at the weekend or on public holidays. This feature may also be used to stop print streams releasing to a printer awaiting repair.



**Print Manager**

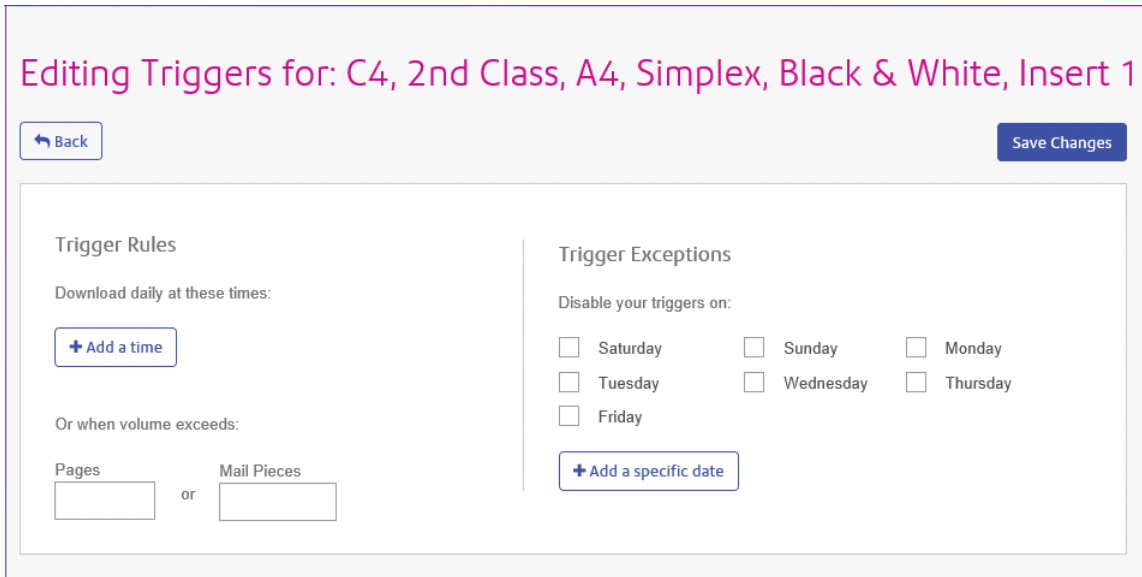
Buttons: Create New Bundle, View Released Print Streams

| My Bundles                                                      | Jobs | Mail Pieces | Pages | Next Trigger                                                   | Trigger Now              |
|-----------------------------------------------------------------|------|-------------|-------|----------------------------------------------------------------|--------------------------|
| RELAY RETURN, Relay Reporting, A4, Simplex, Color, [No Inserts] | 60   | 1506        | 8668  | 08:06 1/5/18 or 0<br><a href="#">Edit</a> <a href="#">View</a> | Mail Pieces<br>500 Pages |
| RELAY RETURN, EmdeonTest, A4, Duplex, Color, [No Inserts]       | 0    | 0           | 0     | No triggers defined<br><a href="#">Edit</a>                    |                          |
| Other                                                           | 10   | 10          | 500   |                                                                |                          |
| All Print Streams                                               | 10   | 10          | 500   |                                                                |                          |

To begin creating a trigger, follow the procedure, below:

1. From the required print stream, click **Edit**.

The following is opened:



**Editing Triggers for: C4, 2nd Class, A4, Simplex, Black & White, Insert 1**

Buttons: Back, Save Changes

**Trigger Rules**

Download daily at these times:

[+ Add a time](#)

Or when volume exceeds:

Pages  or Mail Pieces

**Trigger Exceptions**

Disable your triggers on:

☐ Saturday
 ☐ Sunday
 ☐ Monday
 ☐ Tuesday
 ☐ Wednesday
 ☐ Thursday
 ☐ Friday

[+ Add a specific date](#)

2. Choose one of the following:

- Define a **timed trigger**
- Define a **volume trigger**
- Set **exception days** for this trigger, that is, days on which this trigger does not download the print stream

- Set [specific exception dates](#)

You may choose to set all of these, a link from each procedure takes you to the others.

3. Once you have defined your triggers and set your exception times, click **Save Changes**.
4. Click **Back** to return to the **Print Streams** page.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

This trigger may be edited at any time using this procedure.

## Creating a time trigger

To create a timed trigger, follow the procedure, below:

1. To download daily at a specified time click **Add a time** to open the following:

Trigger Rules

Download daily at these times:

| Time  |
|-------|
| 00:00 |

+ Add a time

2. The default time is given as 00:00, highlight this and type in the time required.
3. Click **Add a time**, the new time is shown.

We strongly recommend that instead of adding multiple download times, add a volume trigger if you are experiencing unusually high numbers of pages or mail pieces.

4. Click **Save Changes**.
5. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

You may also choose to set one or all of the following:

- Set days at which this trigger will not release print streams, for example weekends, as described in [exception days](#)
- Set specific dates on which this trigger will not release print streams, for example public holidays, as described in [specific exception dates](#)
- Specify the maximum number of mail pieces or jobs that, once exceeded, trigger the release of a print stream, as described in [volume trigger](#) in addition to your timed trigger

You may choose to set all of these, a link from each procedure takes you to the others.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

## Creating a volume trigger

To download the print stream when the volume exceeds a number or pages or mail pieces, follow the procedure below:

1. Either:
  - Click within the **Pages** box, or
  - Click within the **Mail Pieces** box
2. Type in the maximum volume, this must be in whole numbers.
3. Click **Save Changes**.
4. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

**Note:** If you set the trigger at 45 mail pieces, and 50 mail pieces are in the job, as soon as 45 out of the 50 are mail pieces are accumulated, the trigger is fired, the bundle is released and a new job is created, even when the remaining 5 mail pieces came from the same document.

You also then choose to set one or all of the following:

- Set days at which this trigger will not release print streams, for example weekends, as described in [exception days](#)
- Set specific dates on which this trigger will not release print streams, for example public holidays, as described in [specific exception dates](#)

You may choose to set all of these, a link from each procedure takes you to the next.

The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

## Creating trigger exception for specific days

To disable triggers on specific days of the week, for example weekends, follow the procedure, below:

1. From **Trigger Exceptions** select the days on which the print stream is NOT to be released.
2. Click **Save Changes**.
3. If you wish to finish now, click **Back** to close the **Editing Triggers** window.

You may also choose to set specific dates on which this trigger will not release print streams, for example public holidays, as described in [specific exception dates](#).

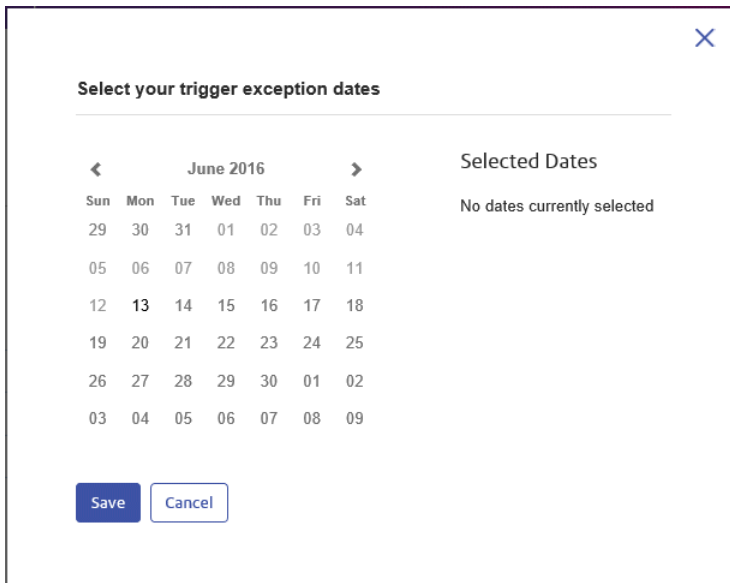
The new trigger is shown in the **Print Stream** page, this may now be viewed or edited.

## Creating trigger exception for specific dates

To disable triggers on specific dates, for example public holidays, follow the procedure, below:

1. In **Trigger Exceptions** click **Add a specific date**.

The following is opened:



Select your trigger exception dates

< June 2016 >

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 29  | 30  | 31  | 01  | 02  | 03  | 04  |
| 05  | 06  | 07  | 08  | 09  | 10  | 11  |
| 12  | 13  | 14  | 15  | 16  | 17  | 18  |
| 19  | 20  | 21  | 22  | 23  | 24  | 25  |
| 26  | 27  | 28  | 29  | 30  | 01  | 02  |
| 03  | 04  | 05  | 06  | 07  | 08  | 09  |

Selected Dates

No dates currently selected

Save Cancel

2. Click the arrows to move backwards or forwards to find the required month.
3. Select the date required from the calendar. Add as many dates as you need, these are then displayed under **Selected Dates**.
4. Once you have added all the dates you need click **Save**.

This closes the calendar and returns you to the **Edit Triggers** window.

5. Click **Save Changes**.
6. Click **Back** to return to the **Print Streams** page.

## Editing a bundle

**Note:** This function is only available to Chief Operators.

To edit a bundle, follow the procedure, below:

1. From within the **My Bundles** page, click  for the required bundle.
2. Select **Edit** from the displayed menu.

The **Edit Bundle** page is opened.

**Note:** An option has been selected for each field in this window.

3. Amend the required fields.

These are described in [Creating a new bundle](#) on page 25.

**Note:** As you make changes to the fields, the **Bundle Name** changes to reflect the new selection.

4. Click **Save**.

The edited bundle name is shown in the **My Bundles** page.

## Delete a bundle

**Note:** This function is only available to Chief Operators.

To delete a bundle, follow the procedure, below:

1. From within the **My Bundles** page, click  for the required bundle.
2. Select **Delete** from the displayed menu.
3. You are prompted to confirm the deletion. Click **OK**.

The deleted bundle is no longer available in the table.



# 5 - Using Relay Communications Hub

This section describes how to create a job by uploading documents to which the Templates are applied.

## In this section

---

|                                          |    |
|------------------------------------------|----|
| Manually releasing a print stream        | 34 |
| Viewing a list of released print streams | 35 |
| Viewing the jobs in a print stream       | 39 |
| Marking a print stream as printed        | 42 |
| Marking a job as mailed                  | 43 |
| Deleting from the "Other" Bundle         | 44 |

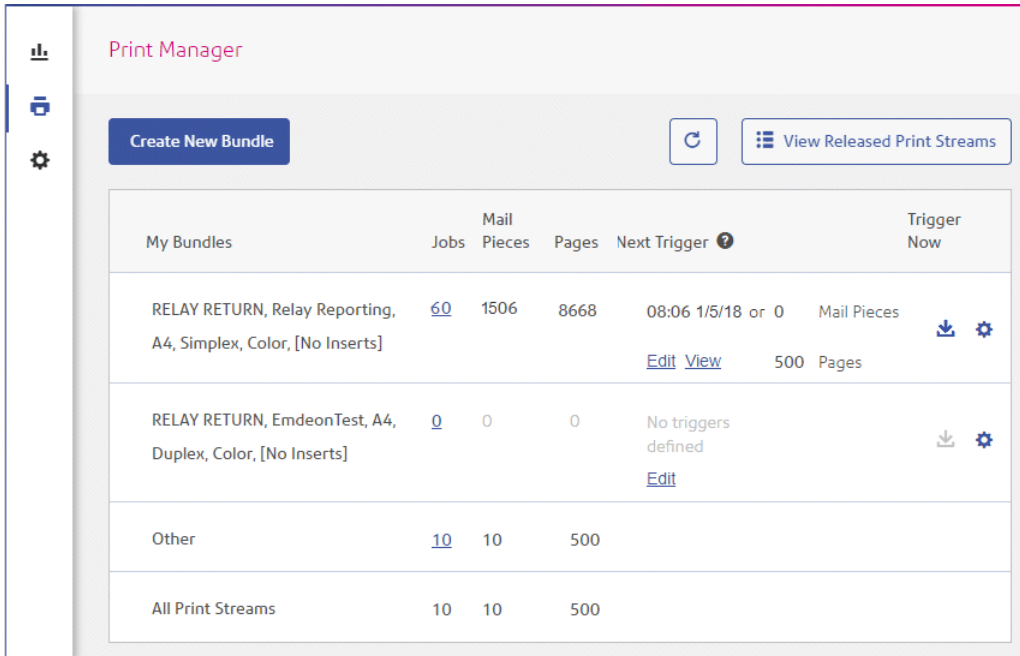
## Manually releasing a print stream

There may come a time when it is expedient to manually release a print stream for download on to a printer. This may happen if a printer becomes unexpectedly available or when the Print Room is shutting down for a period, for example, for a public holiday and you need to clear all of your print streams.

**Note:** The **My Print Streams** page auto-refreshes every 30 seconds. You can refresh the page manually by clicking .

To manually release, follow the procedure, below:

1. In the **Print Streams** page, shown below, click  for the required print stream.

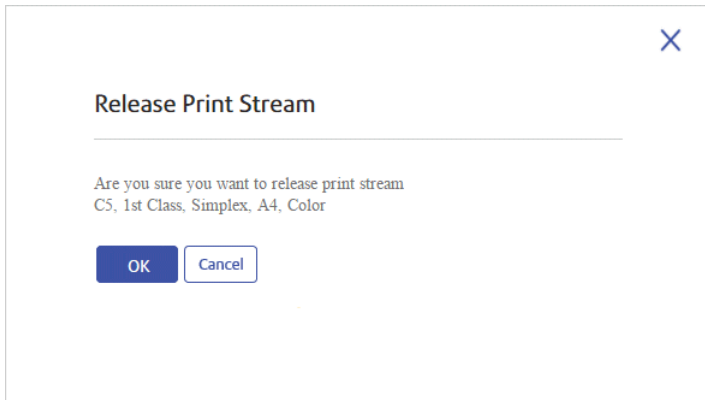


**Print Manager**

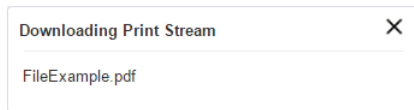
Create New Bundle  View Released Print Streams

| My Bundles                                                      | Jobs               | Mail Pieces | Pages | Next Trigger                                        | Trigger Now                                                                                                                                                                             |
|-----------------------------------------------------------------|--------------------|-------------|-------|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RELAY RETURN, Relay Reporting, A4, Simplex, Color, [No Inserts] | <a href="#">60</a> | 1506        | 8668  | 08:06 1/5/18 or 0                                   | Mail Pieces   |
|                                                                 |                    |             |       | <a href="#">Edit</a> <a href="#">View</a> 500 Pages |                                                                                                                                                                                         |
| RELAY RETURN, EmdeonTest, A4, Duplex, Color, [No Inserts]       | <a href="#">0</a>  | 0           | 0     | No triggers defined                                 |               |
|                                                                 |                    |             |       | <a href="#">Edit</a>                                |                                                                                                                                                                                         |
| Other                                                           | <a href="#">10</a> | 10          | 500   |                                                     |                                                                                                                                                                                         |
| All Print Streams                                               | 10                 | 10          | 500   |                                                     |                                                                                                                                                                                         |

2. You are prompted to confirm this action, see below, click **OK**.



The following message is displayed in the top right corner of the page:



The **Jobs**, **Mail Pieces** and **Pages** for this print stream are reset to zero, but will build up again as jobs are submitted.

## Viewing a list of released print streams

All print streams that have been released for download, either manually or automatically by trigger can be seen by clicking **View Released Print Streams** in the top right corner of the **Print Streams** page. This opens the following page:

Print Manager > Released Print Streams

[Back](#)
All Print Streams
06/01/17 - 12/31/17

| Release Date ▾          | Print Stream                                          | Jobs               | Mail Pieces | Pages | Status       | Printed                             | Mailed |
|-------------------------|-------------------------------------------------------|--------------------|-------------|-------|--------------|-------------------------------------|--------|
| Oct 25, 2017 - 12:41:31 | C5, Relay Reporting, A4, Duplex, Color, [No Inserts]  | <a href="#">59</a> | 59          | 59    | ! Error      |                                     | 0      |
| Sep 25, 2017 - 11:59:17 | C5, Relay Reporting, A4, Duplex, Color, [No Inserts]  | <a href="#">0</a>  | 0           | 0     | ✓ Released   |                                     | 0      |
| Sep 25, 2017 - 11:53:31 | C5, Relay Reporting, A4, Simplex, Color, [No Inserts] | <a href="#">0</a>  | 0           | 0     | ✓ Released   |                                     | 0      |
| Sep 11, 2017 - 08:39:46 | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">1</a>  | 1           | 50    | ✓ Released   | <input type="checkbox"/>            | 0      |
| Sep 7, 2017 - 11:15:55  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">59</a> | 59          | 59    | ⚙ Processing |                                     | 0      |
| Sep 7, 2017 - 11:07:08  | RELAY RETURN, Relay Reporting, A4, Duplex, Blac...    | <a href="#">1</a>  | 1           | 50    | ✓ Released   | <input type="checkbox"/>            | 0      |
| Sep 7, 2017 - 11:07:05  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">1</a>  | 1           | 50    | ✓ Released   | <input type="checkbox"/>            | 0      |
| Sep 5, 2017 - 10:46:38  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">3</a>  | 3           | 150   | ✓ Released   | <input checked="" type="checkbox"/> | 0      |

1-9 of 9 50 per page << < 1 > >>

In this page the following information is displayed:

|                     |                                                                                                                                                                                                                        |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date</b>         | The date on which the print stream was released for download.                                                                                                                                                          |
| <b>Print Stream</b> | The Bundle Name of the print stream, this is the criteria use to concatenate the submitted jobs into one print stream.                                                                                                 |
| <b>Jobs</b>         | The number of jobs in this print stream. This number increases as jobs with the same attributes are submitted. You can click on the number of jobs in a print stream to show its status and list the jobs it contains. |
| <b>Mail Pieces</b>  | Each job is made up of a number of mail pieces. For example, mail pieces are the individual letters in a mail merged job.                                                                                              |
| <b>Pages</b>        | The total number of pages within the print stream.                                                                                                                                                                     |
| <b>Status</b>       | <p>This is one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Processing</b></li> <li>• <b>Released</b> - the print stream is ready for download by the Desktop Client</li> </ul>                   |

|                |                                                                                                                                                                                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Printed</b> | Once the print stream has finished printing and is ready to be posted, you need to place a check mark in this column to confirm that it is complete. This information is fed back to the users who submitted the jobs. |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|               |                                                             |
|---------------|-------------------------------------------------------------|
| <b>Mailed</b> | Gives the total number of mail pieces selected for mailing. |
|---------------|-------------------------------------------------------------|

The total number of jobs, mail pieces and pages is given for all print streams.

In the example, above, the bundle **Other** contains all jobs for which a bundle has not been defined.

## Finding the print streams you wish to see

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

### Filtering print streams

By default, all print streams are displayed. To filter those shown, follow these steps:

1. From within the **Released Print Streams** page click **All Print Streams**, to open the list of options.



2. Select the required print stream.

Only print streams of the selected type are displayed.

### Filter print streams by date

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

1. From within the **Released Print Streams** page click within the date range, shown below.



The following is opened:

Today

Last 7 Days

Month to date

Year to date

Custom Range

Apply Cancel

2. Select the period required, or
3. Click **Custom Range** to open the following:

12/29/17 01/04/18 Today

< December 2017 January 2018 >

| Mo | Tu | We | Th | Fr | Sa | Su | Mo | Tu | We | Th | Fr | Sa | Su |
|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
|    |    |    |    | 1  | 2  | 3  |    |    |    |    |    |    |    |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 | 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 | 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 | 22 | 23 | 24 | 25 | 26 | 27 | 28 |
|    |    |    |    |    |    |    | 29 | 30 | 31 |    |    |    |    |

Custom Range

Apply Cancel

4. Either:
    - Click in the date boxes, enter the dates required manually, or
    - In the calendar click the start date and then the end date. Use the arrows to find the required months.
  5. If you have chosen a **Custom Range** click **Apply** to affect the selection.
- The only the print streams released during the selected period are shown.

## Viewing the jobs in a print stream

You can view the jobs that make up a print stream by clicking its number of jobs. This opens the following page:

Print Manager > RELAY RETURN, Relay Reporting, A4, Simplex - September 5, 2017 - 10:46

[Back](#)

| Jobs | Mail Pieces | Pages | Status   | Printed | Mailed |
|------|-------------|-------|----------|---------|--------|
| 3    | 3           | 150   | Released | Yes     | 0      |

[Re-Release Print Stream](#)

[Job Name](#)  [Mark All as Mailed](#)

| <input type="checkbox"/> | Date                | Jobs       | Mail Pieces | Pages | Submitted By     | Department | Mail...                  |
|--------------------------|---------------------|------------|-------------|-------|------------------|------------|--------------------------|
| <input type="checkbox"/> | Sep 5, 2017 - 10:36 | second.pdf | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |
| <input type="checkbox"/> | Sep 5, 2017 - 10:36 | third.pdf  | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |
| <input type="checkbox"/> | Sep 5, 2017 - 10:41 | first.pdf  | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |

1-3 of 3  per page [<<](#) [<](#) [1](#) [>](#) [>>](#)

At the top of the page, the bundle name is shown, this is a list of attributes of the bundle and includes the date and time at which it was released for download. The following information is displayed:

|                    |                                                                                                                                                                                                                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jobs</b>        | The number of jobs in this print stream.                                                                                                                                                                                                                                                                                                  |
| <b>Mail Pieces</b> | The number of mail pieces in this print stream.                                                                                                                                                                                                                                                                                           |
| <b>Pages</b>       | The total number of pages within the print stream.                                                                                                                                                                                                                                                                                        |
| <b>Status</b>      | This is either <b>Releasing</b> which means that the print stream is in the process of being downloaded to the printer, or <b>Released</b> , which means that the print stream is downloaded and is now printing. If the print stream has not yet been release, you can click <b>Release Print Stream</b> to do so from within this page. |

|                |                                                                                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------|
| <b>Printed</b> | The print stream has been printed. This is manually updated in the <a href="#">Marking a print stream as printed</a> . |
|----------------|------------------------------------------------------------------------------------------------------------------------|

**Note:** When a banner page is used, it will give the bundle name, the release date and time, the number of pages and the number of sides.

The Job table lists all the jobs in the printstream. It is here that bundled and mail piece merges are split into their individual jobs. The following information:

|                     |                                                                                                      |
|---------------------|------------------------------------------------------------------------------------------------------|
| <b>Date</b>         | The date and time on which the print stream was released for download.                               |
| <b>Jobs</b>         | The name of the jobs.                                                                                |
| <b>Mail Pieces</b>  | The number of mail pieces in each job.                                                               |
| <b>Pages</b>        | The number of pages in each job.                                                                     |
| <b>Submitted by</b> | The name of the user who submitted the job.                                                          |
| <b>Department</b>   | The department in which the user works.                                                              |
| <b>Mailed</b>       | Select job for mailing. This is only available where a parent mail piece has been marked as printed. |

The total number of jobs, mail pieces and pages is given for all print streams.

In the example, above, the bundle **Other** contains all jobs for which a bundle has not been defined.

## Sorting jobs

By default, the jobs are displayed in alphabetical job name order. To sort by another criterion, follow these steps:

1. From within the **Jobs** table click **Job Name**, to open the list of options.



2. Select the criteria by which you wish to filter, one of the following:
  - **Submitted by**
  - **Department**
  - **Job Name**



The jobs are then sorted alphabetically by the option chose.

## Searching for jobs

To search for a job, follow these steps:

1. From within the **Job Reports** page, click in the **Search for a job** box, shown below:

A rectangular input box with a light gray border. On the left side, there is a magnifying glass icon. To the right of the icon, the word "Search" is written in a small, light gray font.

2. Type in the letters for which you wish to search. To find "Blood Test Results", you need type only part of the text you wish to find, for example, "blood" or "test" or "results".
3. To begin the search, either:
  - Click , or
  - Press **Enter**.

To return to the previous list of jobs, delete the characters in the **Search for a job** box. By default, the Job Summary is shown for the first job in the left-hand panel.

## Deleting Jobs from a Printstream

### Note:

To delete a job from its Printstream follow the procedure below:

1. Either:
  - Select the check box in the **Date** column heading to select all jobs, or
  - Select the individual jobs(s) you wish to delete.

The  icon is now enabled

2. Click **Delete Job**.
3. A message is displayed requiring that you confirm deletion. Click **OK**.

The job(s) is marked with  and is no longer available for use.

**Note:** You can use the same process to delete "Other" bundles that have been submitted in error.

## Marking a print stream as printed

Once the print stream has finished printing and is ready to be posted, you need confirm that it is complete. This information is fed back to the users who submitted the jobs in the print stream and this will confirm to them that everything has happens as it should.

The **Released Print Streams** page is shown below.

Print Manager > Released Print Streams

[Back](#)
All Print Streams
06/01/17 - 12/31/17

| Release Date ▼          | Print Stream                                          | Jobs               | Mail Pieces | Pages | Status     | Printed                             | Mailed |
|-------------------------|-------------------------------------------------------|--------------------|-------------|-------|------------|-------------------------------------|--------|
| Oct 25, 2017 - 12:41:31 | C5, Relay Reporting, A4, Duplex, Color, [No Inserts]  | <a href="#">59</a> | 59          | 59    | Error      |                                     | 0      |
| Sep 25, 2017 - 11:59:17 | C5, Relay Reporting, A4, Duplex, Color, [No Inserts]  | <a href="#">0</a>  | 0           | 0     | Released   |                                     | 0      |
| Sep 25, 2017 - 11:53:31 | C5, Relay Reporting, A4, Simplex, Color, [No Inserts] | <a href="#">0</a>  | 0           | 0     | Released   |                                     | 0      |
| Sep 11, 2017 - 08:39:46 | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">1</a>  | 1           | 50    | Released   | <input type="checkbox"/>            | 0      |
| Sep 7, 2017 - 11:15:55  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">59</a> | 59          | 59    | Processing |                                     | 0      |
| Sep 7, 2017 - 11:07:08  | RELAY RETURN, Relay Reporting, A4, Duplex, Blac...    | <a href="#">1</a>  | 1           | 50    | Released   | <input type="checkbox"/>            | 0      |
| Sep 7, 2017 - 11:07:05  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">1</a>  | 1           | 50    | Released   | <input type="checkbox"/>            | 0      |
| Sep 5, 2017 - 10:46:38  | RELAY RETURN, Relay Reporting, A4, Simplex, Col...    | <a href="#">3</a>  | 3           | 150   | Released   | <input checked="" type="checkbox"/> | 0      |

1-9 of 9 50 per page << < 1 > >>

Once a print stream shows a status of **Released** has gone through the following physical steps:

- the mail pieces have been printed
- the mail pieces have inserted into the specified envelopes
- the inserts have been placed in the envelopes with the mail piece
- The envelopes are sealed and postage attached

You **MUST** place a check mark in the **Printed** column of the print stream.

**Note:** If a mail piece previously marked as printed is unchecked, the status returns to "Job in Print Queue".

## Marking a job as mailed

Once the print stream has finished printing and is ready to be posted, you need confirm that it is complete. This information is fed back to the users who submitted the jobs in the print stream and this will confirm to them that everything has happens as it should.

Once a mail piece has been marked as Printed, described in [Marking a print stream as printed](#) on page 42, and its jobs have be passed to your mail delivery service mark each job as mailed, as follows:

1. In the **Released Print Streams** page, shown earlier in this section, click the number of jobs for the printed mail piece.

This opens the list of jobs, shown below:

The screenshot shows the 'Print Manager' interface. At the top, the breadcrumb is 'Print Manager > RELAY RETURN, Relay Reporting, A4, Simplex - September 5, 2017 - 10:46'. Below this is a 'Back' button. A summary row shows: Jobs: 3, Mail Pieces: 3, Pages: 150, Status: Released, Printed: Yes, Mailed: 0. There is a 'Re-Release Print Stream' button. Below the summary is a search bar with 'Job Name' and a 'Search' button, and a 'Mark All as Mailed' button. A table lists the jobs:

| <input type="checkbox"/> | Date ▲              | Jobs       | Mail Pieces | Pages | Submitted By     | Department | Mail...                  |
|--------------------------|---------------------|------------|-------------|-------|------------------|------------|--------------------------|
| <input type="checkbox"/> | Sep 5, 2017 - 10:36 | second.pdf | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |
| <input type="checkbox"/> | Sep 5, 2017 - 10:36 | third.pdf  | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |
| <input type="checkbox"/> | Sep 5, 2017 - 10:41 | first.pdf  | 1           | 50    | RCH1@maildrop.cc | Testing    | <input type="checkbox"/> |

At the bottom, it shows '1-3 of 3' items, a dropdown for '50 per page', and pagination controls with '1' selected.

2. Either:

- Place a check mark in the **Mailed** column for each mailed mail piece.
- Click **Mark all as Mailed**.

If a job previously marked as mailed is unchecked, the status returns to "Job Printed".

# Deleting from the "Other" Bundle

To delete a job from the **Other** bundle, shown below, follow the procedure next:

Print Manager

Create New Bundle

View Released Print Streams

| My Bundles                                                      | Jobs | Mail Pieces | Pages | Next Trigger ?                                                 | Trigger Now              |
|-----------------------------------------------------------------|------|-------------|-------|----------------------------------------------------------------|--------------------------|
| RELAY RETURN, Relay Reporting, A4, Simplex, Color, [No Inserts] | 0    | 0           | 0     | 08:06 1/5/18 or 0<br><a href="#">Edit</a> <a href="#">View</a> | Mail Pieces<br>500 Pages |
| RELAY RETURN, EmdeonTest, A4, Duplex, Color, [No Inserts]       | 0    | 0           | 0     | No triggers defined<br><a href="#">Edit</a>                    |                          |
| Other                                                           | 10   | 10          | 500   |                                                                |                          |
| All Print Streams                                               | 10   | 10          | 500   |                                                                |                          |

1. In the **Other** bundle click the number of jobs to open the following page:

[Back](#)

| Jobs | Mailpiece | Pages | Status   | Printed | Mailed |
|------|-----------|-------|----------|---------|--------|
| 24   | 24        | 4,472 | Released | No      | 0      |

[Release Print Stream](#)

[Job Name](#)

| <input type="checkbox"/> | Date ▲               | Jobs                            | Mail Pieces | Pages | Submitted By | Department  |
|--------------------------|----------------------|---------------------------------|-------------|-------|--------------|-------------|
| <input type="checkbox"/> | Mar 21, 2017 - 10:57 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | chand1...    | Relay Admin |
| <input type="checkbox"/> | Mar 21, 2017 - 06:55 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | chand1...    | Relay Admin |
| <input type="checkbox"/> | Mar 21, 2017 - 07:05 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | chand1...    | Relay Admin |
| <input type="checkbox"/> | Mar 23, 2017 - 09:11 | GROUPING_JobMarch2RUCHI.pdf     | 1           | 0     | chand1...    | Relay Admin |

## 2. Either:

- Select the check box in the column heading to select all jobs, or
- Select the individual job(s) you wish to delete.

The icon is now enabled, click it.

3. A message is displayed requiring that you confirm deletion. Click **OK**.

The job(s) is marked with **X**, as shown below, and is no longer available for use.

[Job Name](#)

| <input type="checkbox"/>            | Date ▲               | Jobs                            | Mail Pieces | Pages | Submitted By      | Department  | Mailed                   |
|-------------------------------------|----------------------|---------------------------------|-------------|-------|-------------------|-------------|--------------------------|
| <input checked="" type="checkbox"/> | Mar 20, 2017 - 10:57 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | test_ronchand1... | Relay Admin | <input type="checkbox"/> |
| <input type="checkbox"/>            | Mar 21, 2017 - 06:55 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | test_ronchand1... | Relay Admin | <input type="checkbox"/> |
| <input type="checkbox"/>            | Mar 21, 2017 - 07:05 | ENHANCE_Job_PD_Other_Admin2.... | 1           | 50    | test_ronchand1... | Relay Admin | <input type="checkbox"/> |
| <input type="checkbox"/>            | Mar 23, 2017 - 09:11 | GROUPING_JobMarch2RUCHI.pdf     | 1           | 0     | test_ronchand1... | Relay Admin | <input type="checkbox"/> |

# 6 - Viewing Job Reports

**Job Reports** gives you access to the jobs you have submitted. This is opened by clicking  in the side bar. The jobs are listed in chronological order with the most recent job to be submitted at the top. By default the first job in the list is selected and if it has completed processing, its Job Summary is displayed.

**Job Reports** provides you with the ability to:

- Search for jobs by specific criteria
- Filter jobs by date or a range of dates
- View job summaries
- Export a report of all your jobs in `csv` format
- View an email deliverability report

**Note:** Jobs printed through the Printer Driver by the same user and using the same Job Options are merged and are displayed in the Jobs List as one job.

If you are not using a centralized print room to process your jobs, a further two operations are available:

- Download a report of undelivered emails
- Delete jobs that are no longer required

## In this section

---

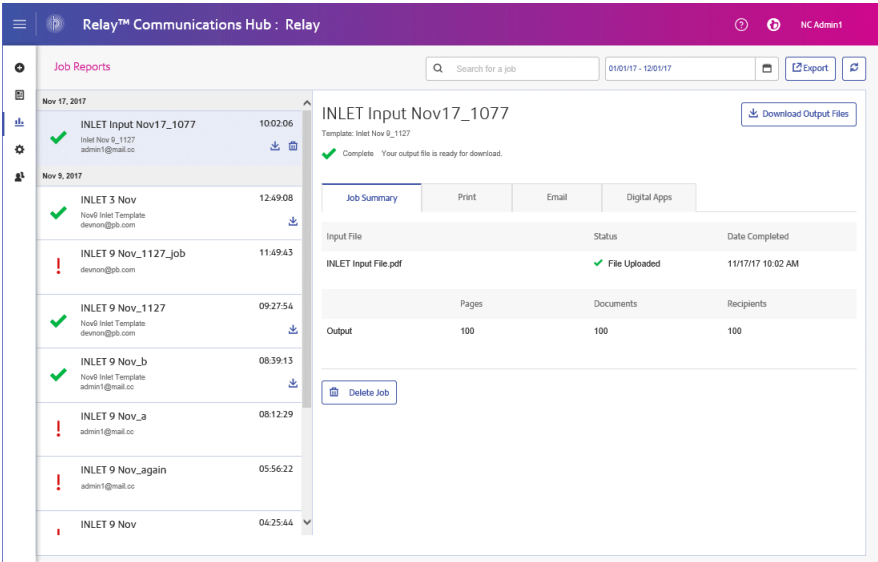
|                                           |    |
|-------------------------------------------|----|
| Job Reports                               | 47 |
| Finding the jobs you wish to see          | 53 |
| Email Deliverability report               | 58 |
| Viewing a breakdown of Export Undelivered | 59 |
| Deleting a Job                            | 61 |
| Using TrackMyMail                         | 64 |

# Job Reports

**Job Reports** lets you view a list of the jobs that have submitted for printing by users. Immediately after uploading a job it is shown as in print queue; no data is shown in the **Job Summary** section. Click  to ensure the list is up-to-date.

The jobs are listed in chronological order with the most recent job to be submitted at the top. By default the first job in the list is selected and when has completed processing, its **Job Summary** is displayed.

The **Job Reports** page is shown below:



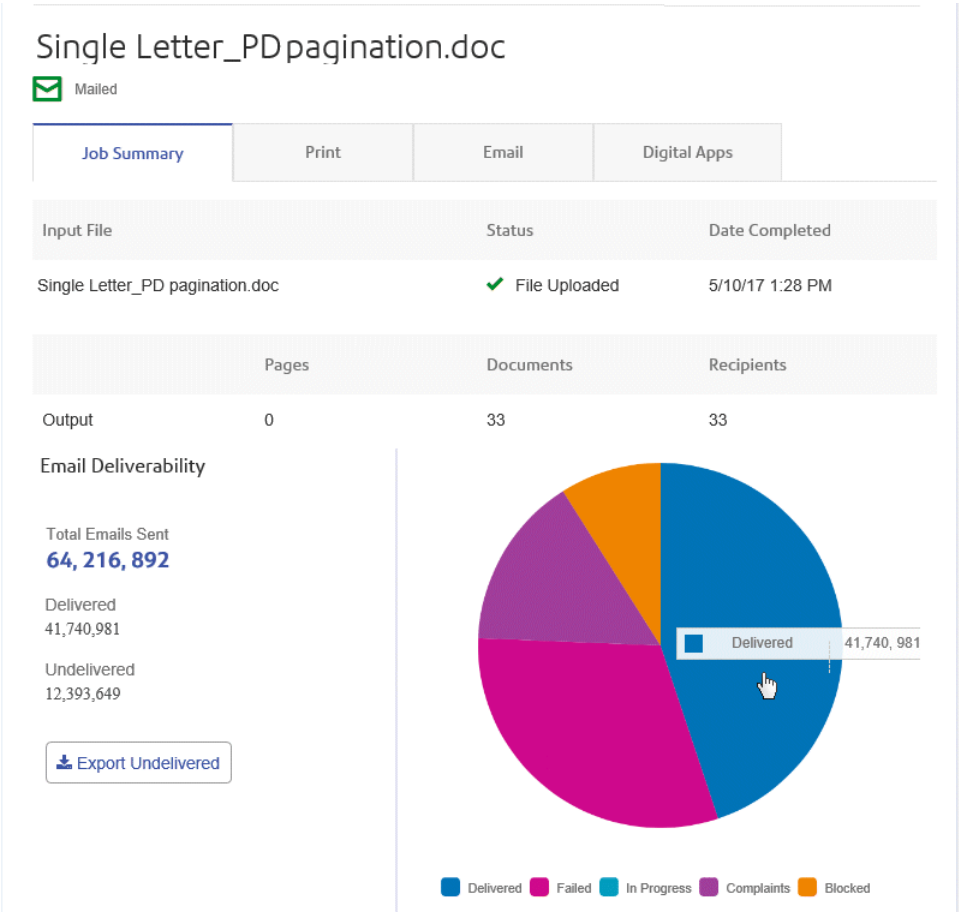
The left-hand panel gives a scrollable list of jobs in the order in which they were submitted, newest to oldest.

The status of your job can be one of the following:

-  Job is in the print queue. It is waiting to be printed and/or emailed and/or archived. Please contact your central print room if this status does not change to completed.
-  Job is printed.
-  Job has been mailed. This job is now complete.
-  Job error. Speak with your Print Room Operator.

## Job Summary

Once a job has completed processing, the **Job Summary** is displayed in the right-hand panel. By default, the Job Summary is shown for the first job in the left-hand panel. Select another job to open its summary. All jobs have a summary, regardless of their status. An example is shown next:



The information shown is as follows:

|                |                                                                                                        |
|----------------|--------------------------------------------------------------------------------------------------------|
| Input File     | The name of the input file. In the example, this is Single Letter_PD pagination.doc                    |
| Status         | The status of the job, as described in Job Summary on page 48.                                         |
| Date Completed | The date on which the job completed processing, that is, printed, emailed, or passed to a digital app. |
| Pages          | The number of pages output to the above. This may not be relevant in all cases.                        |



|                  |                                             |
|------------------|---------------------------------------------|
| <b>Documents</b> | The number of documents/mail pieces output. |
|------------------|---------------------------------------------|

|                   |                                                           |
|-------------------|-----------------------------------------------------------|
| <b>Recipients</b> | The number of recipients for those documents/mail pieces. |
|-------------------|-----------------------------------------------------------|

Mail merged documents are presented as one job in the **Job Summary**. For example, if a user submits a number of jobs with the same Job Options through the Printer Driver, these appear in the Job Reports page as one job.

The remainder of the information given in the Job Summary is not the same for all job types or all statuses.

### Job Summary details

Once a job has completed processing, the **Job Summary** is displayed in the right-hand panel. By default, the Job Summary is shown for the first job in the left-hand panel. Select the job to open its summary.

All job have a summary, regardless of their status. An example is shown below:

|                |                                                                                                                                                                                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Details</b> | <p>Gives the name of the <b>Template</b> used, the <b>User</b> name of the person submitting the job and the <b>Department</b> to which that user belongs.</p> <p>This information appears for jobs of any status.</p> |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                    |                                                                                                                                                                            |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Input files</b> | <p>These are the files you submitted to Relay Communications Hub. The number of files is shown in parenthesis.</p> <p>This information appears for jobs of any status.</p> |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                     |                                                                                                                                                                                                                 |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Output Files</b> | <p>These are the files generated by Relay Communications Hub from your input files and your templates. The number of files is shown in parenthesis.</p> <p>This information appears for jobs of any status.</p> |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                             |                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Email Deliverability</b> | <p>If you used one of the emailing templates, a chart shows what happened to the emails. A spreadsheet giving more information may be downloaded by clicking <b>Email Deliverability</b>.</p> <p>This information appears for jobs of any status. This is described in greater detail in <a href="#">Email Deliverability report</a> on page 58.</p> |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

In addition, the **Email** tab is shown for any jobs using an emailing Template.

Print, Email and Digital Apps tabs

The **Print**, **Email** and **Digital Apps** tab information provide the same type of information. The **Email** tab is shown below, as an example:

SALESDEMO.pdf

Mailed

Job Summary

Print

Email

Digital Apps

14 Sent

Export Undelivered

All

Search in this report

| Recipient Reference | Date/Time       | Status   |
|---------------------|-----------------|----------|
| load@gmail.com      | 5/10/17 - 07:37 | Complete |
| load@gmail.com      | 5/10/17 - 07:37 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:38 | Complete |
| load@gmail.com      | 5/10/17 - 07:39 | Complete |

The Job Summary has four tabs, as follows:

|                    |                                                                                                                                                                                  |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Summary</b> | This is the first page displayed when a job is selected from the list in the left-hand side of the page. It provides the information described in <b>Job Summary</b> on page 48. |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

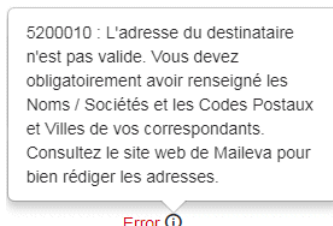
**Print**

Lists the documents/mail pieces processed for a Recipient (Recipient Reference column helps in identifying them uniquely). It gives the date and time that the job completed. In addition, the status of each mail piece is given.

For Maileva, mail pieces that were meant to be sent digitally but were finally printed and sent by traditional mail, move to this tab after confirmation from Maileva. This can happen if a customer is not signed up with Maileva for digital communication.

**Note:** Initially these mail-pieces are shown in the **Digital Apps** tab.

Mail pieces which failed while processing appear in Error state. The reason of failure is indicated, as shown below:

**Email**

Lists the documents/mail pieces processed by Recipient Reference and gives the date and time that the job completed. In addition, the status of each mail piece is given.

**Digital Apps**

The **Digital Apps** tab is for those mail pieces delivered to the end user electronically, even by the third party providers. For Maileva, if a customer has signed up for digital delivery with Maileva and their company is setup to send documents to Maileva using DIGITAL MODE, then mail pieces/documents are not printed but are delivered electronically to that user.

This tab lists the documents/mail pieces processed for a Recipient (Recipient Reference column helps in identifying them uniquely). It gives the date and time that the job completed. In addition, the status of each mail piece is given. Status of the mail piece is returned from the third party providers and is shown in this tab. In the case of Maileva, which is supported for users in France only, some of the mail pieces may not be sent electronically, but are printed and sent by traditional mail. The status of these mail pieces then shows in the **Print** tab.

For information on connecting to Maileva or other Digital Apps once they become available, contact Pitney Bowes.

To find a specific mail piece or organize those displayed, see:

- [Searching for Mail Pieces](#) on page 52
- [Filtering Documents By Status](#) on page 51
- [Sorting Mail Pieces](#) on page 52

**[Filtering Documents By Status](#)**

You can filter the documents/mail pieces displayed as follows:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.

2. Click .

3. Select one of the following:

- All
- Processing
- Complete
- Error

**Note:** The number in parentheses beside each options gives the number of documents/mail pieces for that option.

A filtered list of mail pieces is displayed.

### Searching for Mail Pieces

To search for a mail piece, follow these steps:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.
2. Click in the **Search for a job** box, shown below:

3. Type in the letters for which you wish to search. To find "Mrs Smith", you need type only part of the text you wish to find, for example, "Smi".
4. To begin the search, either:
  - Click , or
  - Press **Enter**.

To return to the previous list of jobs, delete the characters in the **Search for a job** box.

### Sorting Mail Pieces

You can sort the documents/mail pieces displayed by either:

**Recipient Reference**                      Alphanumerically, either in ascending or descending order.

**Data/Time**                                  Chronologically, either in first to last or last to first.

To do this, follow the procedure below:

1. From within the required **Job Summary**, open the **Print**, **Email** or **Digital Apps** tab, depending on which you wish to see.
2. Click the required column heading, Recipient Reference or Data/Time.  
An arrow beside the column indicates the order.
3. Click the same column heading again to reverse the sort order.

## Finding the jobs you wish to see

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

Job reports are created for all jobs that have passed through the Relay Communications Hub, that is, with a status of Completed.

### Searching for jobs

To search for a job, follow these steps:

1. From within the **Job Reports** page, click in the **Search for a job** box, shown below:

A rectangular search box with a light gray border. On the left side, there is a magnifying glass icon. To the right of the icon, the word "Search" is written in a small, light gray font.

2. Type in the letters for which you wish to search. To find "Blood Test Results", you need type only part of the text you wish to find, for example, "blood" or "test" or "results".
3. To begin the search, either:
  - Click , or
  - Press **Enter**.

To return to the previous list of jobs, delete the characters in the **Search for a job** box. By default, the Job Summary is shown for the first job in the left-hand panel.

### Filtering jobs by date

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

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

A vertical menu with buttons for 'Today', 'Last 7 Days', 'Month to date', 'Year to date', 'Custom Range', 'Apply', and 'Cancel'.

- Click on the required date range to show the jobs processed during that period, or
- Click **Custom Range** to open the following:

A calendar interface for selecting a date range. It shows December 2017 and January 2018. The start date is 12/29/17 and the end date is 01/04/18. The calendar grid highlights the selected dates. To the right is a sidebar with buttons for 'Today', 'Last 7 Days', 'Month to date', 'Year to date', 'Custom Range', 'Apply', and 'Cancel'.

- Either:
  - Click in the date boxes and enter the dates required manually, or
  - In the calendar click the start date and then the end date. Use the arrows to find the required months.
- If you have chosen a **Custom Range** click **Apply** to affect the selection.

The filtered jobs are displayed in the left-hand panel. By default, the **Job Summary** is shown for the first job in the right-hand panel.

## Exporting a report

Once you have specified the required date range for the print streams displayed, you can export the information shown as a CSV file. This report gives details of all print streams sent within that time and is particularly useful if you wish to report on print streams submitted over long periods. To do this, follow the procedure, below:

- Click to ensure you have the most up to date information.
- Select the required job in the left-hand panel.
- Click Export
- In the **Save as** dialog, navigate to the required location, give the file a meaningful name and click **Save**.

The file is then downloaded to the specified location and is available to be used as required.

## Report Field Descriptions

The report fields are as follows:

|                                   |                                                                                                                                                                                   |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job ID</b>                     | Unique ID for the job.                                                                                                                                                            |
| <b>Job Name</b>                   | The name of the job.                                                                                                                                                              |
| <b>Mail Piece ID</b>              | Unique ID for this mail piece.                                                                                                                                                    |
| <b>Print Stream ID</b>            | Unique ID for the printstream.                                                                                                                                                    |
| <b>Input file name</b>            | A unique file name designated by the system.                                                                                                                                      |
| <b>Bundle Name</b>                | The unique name of the bundle. This is a list of the criteria used to create the bundle, for example, "RELAY RETURN, Relay Reporting, A4, Duplex, Black and White, [No Inserts]". |
| <b>User Name</b>                  | The username of the submitting user.                                                                                                                                              |
| <b>Department Name</b>            | The name of the department to which the user belongs.                                                                                                                             |
| <b>Job Submitters Email</b>       | The submitting user's email.                                                                                                                                                      |
| <b>Date Submitted</b>             | The date on which the job was submitted.                                                                                                                                          |
| <b>Print Channel Status</b>       | The latest status of printed mail pieces, for example, Delivered, Sent.                                                                                                           |
| <b>Print Channel Status Date</b>  | The date on which the <b>Print Channel Status</b> was last updated.                                                                                                               |
| <b>Print Send Date</b>            | The date on which the mail pieces in the job were sent.                                                                                                                           |
| <b>Print Job Option Send Date</b> | The send date selected in the Printer Driver's Job Options by the submitting user.                                                                                                |
| <b>Simplex &amp; Duplex</b>       | Whether the job is simplex (one-sided) or duplex (double-sided).                                                                                                                  |
| <b>Paper Size</b>                 | The size of the paper on which the mail pieces are printed for a physical print job.                                                                                              |

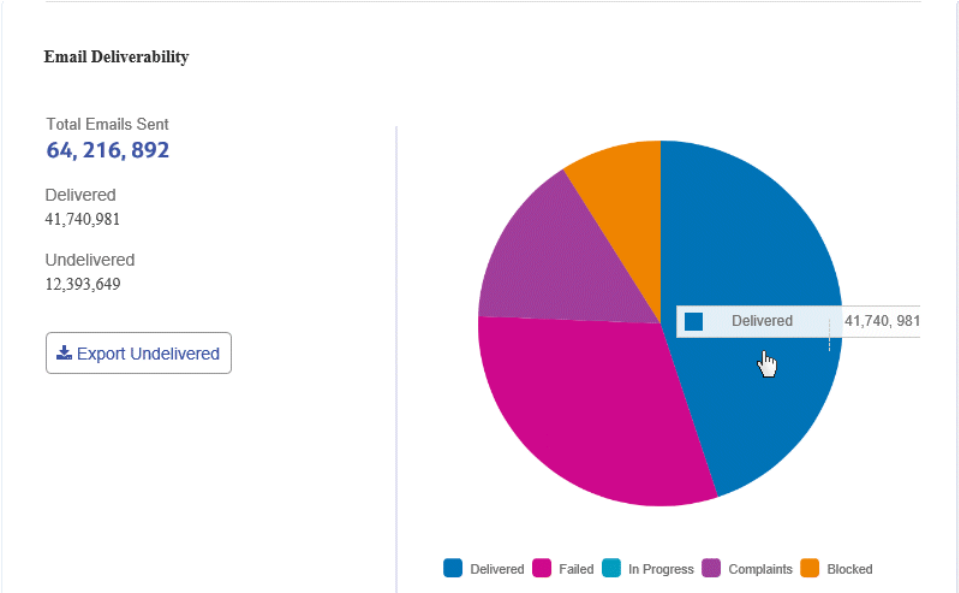
|                                     |                                                                                                                                                                        |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sheet 1 Stock</b>                | The sheet stock or paper used for the first page of the mail piece. This may be a form or headed paper.                                                                |
| <b>Sheet 2 Onward Stock</b>         | The sheet stock or paper used for the remaining pages in the mail piece, usually plain paper.                                                                          |
| <b>Job Reference</b>                | The reference number of the job. This is defined at submission.                                                                                                        |
| <b>Simplex Pages / Duplex Sides</b> | The number of pages. For simplex, one page comprises a printed side and a blank side. For duplex the number of sides is the number of sides on which printing appears. |
| <b>Deleted By</b>                   | The username of the deleting user.                                                                                                                                     |
| <b>Deleted On</b>                   | The date on which the job was deleted.                                                                                                                                 |
| <b>Deleted By (Email)</b>           | The email address of the deleting user.                                                                                                                                |
| <b>Template/Communication Type</b>  | The template or communication type selected on submission.                                                                                                             |
| <b>Attachment Name</b>              | The name(s) of any attachments.                                                                                                                                        |
| <b>Destination Address</b>          | The postal address of the recipient.                                                                                                                                   |
| <b>Color or Black &amp; White</b>   | Whether the mail pieces are printed in black and white or color.                                                                                                       |
| <b>Mailing Service</b>              | The mailing service by which the mail piece is sent. For example, first class, second class.                                                                           |
| <b>Envelope</b>                     | The size of the envelope in which the mail piece is sent.                                                                                                              |
| <b>Region Group</b>                 | The postal region in which the recipient resides.                                                                                                                      |
| <b>Email Channel Status</b>         | The latest status of printed mail pieces, for example, Delivered, Sent.                                                                                                |
| <b>Email Channel Status Date</b>    | The date on which the <b>Email Channel Status</b> was last updated.                                                                                                    |
| <b>Email Send Date</b>              | The date on which the email was sent.                                                                                                                                  |
| <b>Email Job Option Send Date</b>   | The send date selected by the submitting user in the Printer Driver's Job Options.                                                                                     |
| <b>From</b>                         | The email address that you wish the recipient to see, for example, an administration email address, this could be admin@ycompanyname.com                               |



|                                    |                                                                                                               |
|------------------------------------|---------------------------------------------------------------------------------------------------------------|
| <b>Sender</b>                      | The email address of the sender.                                                                              |
| <b>Reply To</b>                    | The address to which replies to sent emails are returned.                                                     |
| <b>Email To</b>                    | The recipient's email address.                                                                                |
| <b>Email CC To</b>                 | Email addresses to which copies of the email are sent. This may be an archive or supervisor.                  |
| <b>Subject</b>                     | The subject line of the email.                                                                                |
| <b>Body</b>                        | The body text of the email.                                                                                   |
| <b>Digital App Name</b>            | The name of the digital app to which mail pieces are sent.                                                    |
| <b>Recipient Reference</b>         | The unique Id of the customer to which this mail piece has been sent, for example, an account number.         |
| <b>Digital Channel Status</b>      | The latest status of mail pieces sent through a digital app, for example, Delivered, Sent, Failed, completed. |
| <b>Digital Channel Status Date</b> | The date on which the <b>Digital Channel Status</b> was last updated.                                         |
| <b>Digital Channel Send Date</b>   | The date on which mail pieces were sent to the digital app.                                                   |

# Email Deliverability report

If you used one of the templates that provides an emailing function to process your job, the **Email Deliverability** report is shown in the Job Summary below. An example is shown, next:



This report gives the **Total Emails Sent**, **Delivered** and **Undelivered**. The pie chart breaks down the status of the emails, which are as follows:

|             |                                                                                                                                                         |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Delivered   | The email has been delivered to the recipient.                                                                                                          |
| In progress | The email is still processing. This is updated as the status of the emails change.                                                                      |
| Blocked     | The email is not delivered because the email address in not a valid or does not exist.                                                                  |
| Failed      | The email is not delivered because the recipient has actively blocked emails from your sender address.                                                  |
| Complaints  | The email is not delivered because the recipient has actively blocked emails from your sender address and has made a complaint to the service provider. |

## Downloading the Email Deliverability report

To do this, follow the procedure, below:

1. Click  to ensure you have the most up to date information.
2. Select the required job in the left-hand panel.
3. Click **Export Undelivered**.
4. In the **Save as** dialog, navigate to the required location, give the file a meaningful name and click **Save**.

The file is then downloaded to the specified location and is available to used as required.

## Viewing a breakdown of Export Undelivered

If the Template used in your Job generated emails, you can view a breakdown of the Export Undelivered and delivery failures by clicking its job name in the left-hand panel. When the **Job Summary** page opens in the right-hand panel, click the **Email** tab to display the following:



SALESDemo\_test

Template: Email-Salesdemo

Your output file is ready for download.

Download Output Files

Job Summary

Email

14 Sent

Export Undelivered

All

Search by email address

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

Back to Top

The job name is given at the top of the page with the name of the template used. A  indicates that the job processed successfully.

The **Email** tab gives the total number of emails sent, this is the number of emails generated during job creation. The body of the table gives the email address of the intended recipient, the name of the **Input File**, the **Date/Time** that the email was generated and the status of the emails. This information is the same as given in [Email Deliverability report](#) on page 58.

To filter the emails displayed by status, click 

All

 and select the status you wish to see from the menu.

## Search for an email address

To search for an email address, follow these steps:

- From within the **Email** tab, in the left-hand panel, click in the **Search by email address** box, shown below:

Search by email address

2. Type in the email address for which you wish to search.
3. To begin the search, either:
  - Click , or
  - Press **Enter**.

To return to the previous list of email addresses, delete the characters in the **Search for an email address** box.

## Deleting a Job

You can delete jobs from the **Job Reports** page either from the scrollable job list in the left-hand panel or from the Job Summary. Both are described below.

Only jobs with the following statuses can be deleted. For ease of use, only jobs displaying a  icon or a **Delete** button may be deleted.

|                                                                                     |                                                                      |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------|
|  | Printed                                                              |
|  | Mailed. This job has been mailed but can be removed from the system. |
|  | Job error.                                                           |
|  | Job printing.                                                        |

**Note:** Exported job reports include a time stamp and the user/operator who deleted the job.

## Deleting a Job from the Job Report List

To delete a job from the scrollable job list on the left-hand side of the **Job Reports** page follow the procedure below:

1. Select the required job from the list.

The Job list is as follows. A  on the same line as the job name, the job may be deleted.

| Job Reports                                                                       |                                                                 |                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Jun 12, 2017                                                                      |                                                                 |                                                                                                                                                                                 |
|  | Enhance Delete2<br>Custom Enhance<br>test_ronchand120@pb.com    | 08:30:30<br>  |
|  | HOUSEHOLDING<br>Custom House-holding<br>test_ronchand120@pb.com | 08:24:07<br>                                                                                   |
|  | Enhance Delete1<br>Custom Enhance<br>test_ronchand120@pb.com    | 08:22:21<br>                                                                                   |

2. Click .
  3. A message is displayed requiring that you confirm deletion. Click **OK**.
- The job is marked with , as shown below, and is no longer available for use.

| Job Reports                                                                        |                                                              |                                                                                                 |
|------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Jun 12, 2017                                                                       |                                                              |                                                                                                 |
|  | Enhance Delete2<br>Custom Enhance<br>test_ronchand120@pb.com | 08:30:30<br> |

## Deleting a Job from Its Job Summary

To delete a job from its Job Summary in the **Job Reports** page follow the procedure below:

1. Select the required job from the Job list.

The Job Summary is shown below:

## Enhance Delete2

Template: Custom Enhance

Complete Your output file is ready for download.

[Download Output Files](#)

[Job Summary](#)
[Print](#)
[Email](#)
[Digital Apps](#)

| Input File          | Status        | Date Completed  |
|---------------------|---------------|-----------------|
| Enhance Delete1.pdf | File Uploaded | 6/12/17 8:30 AM |

[Delete Job](#)

- In the Job Summary click **Delete Job**.
- A message is displayed requiring that you confirm deletion. Click **OK**.

The job is marked with , as shown below, and in the Job list. It is no longer available for use.

## Enhance Delete2

Template: Custom Enhance

Job deleted by test\_ronchand120@pb.com on 6/13/17 at 11:59

[Download Output Files](#)

[Job Summary](#)
[Print](#)
[Email](#)
[Digital Apps](#)

| Input File          | Status        | Date Completed  |
|---------------------|---------------|-----------------|
| Enhance Delete1.pdf | File Uploaded | 6/12/17 8:30 AM |

[Delete Job](#)

**Note:** Jobs with an error status do not have a Job Summary and so cannot be deleted in this way. Use [Deleting a Job from the Job Report List](#) on page 61 instead.

## Using TrackMyMail

This product can be used with Pitney Bowes's TrackMyMail. Our Technical Support team can configure both products. For information on how to use TrackMyMail, refer to the user documentation provided with the product.



# 7 - Managing Bundling Options

Chief Operators need to define the options available when [Creating a new bundle](#) on page 25. The options created describe options available on the printers and inserters used to output and post mail pieces. In some cases, for example, Envelope, Paper and Inserts, these options refer to physical stationary. In other cases, for example Plex and Color, these refer to print options provided on the printer.

The procedure for creating these options is the same in all cases.

**Note:** You may create as many options as you wish, however, they will only work where the same options are available on the printers and inserters used in your print room.

## In this section

---

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| Creating Envelopes    | 66 |
| Creating Mail Classes | 67 |
| Creating Paper        | 67 |
| Creating Plex         | 68 |
| Creating Color        | 69 |
| Creating Inserts      | 69 |

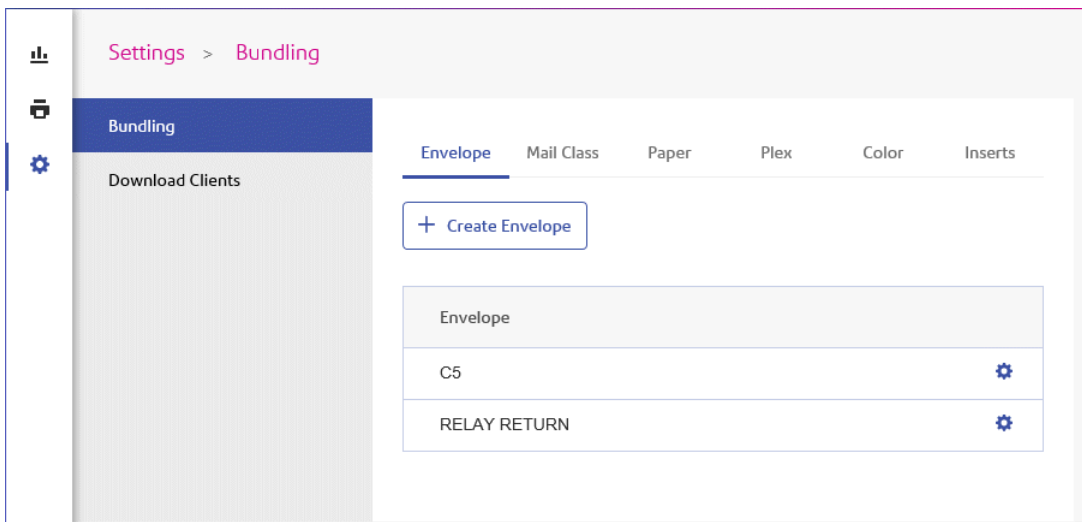
## Creating Envelopes

To add an envelope option, follow the procedure below.

**Note:** Only options describing physical envelopes available on the inserters you use should be added. If you create an envelope for which there is no physical equivalent, the bundle will fail.

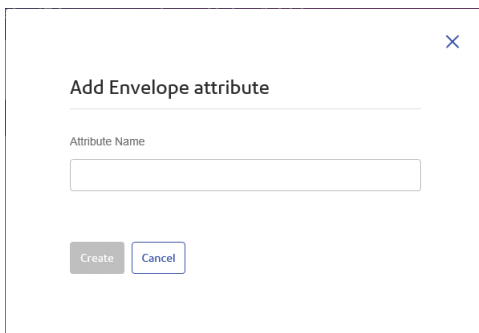
1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the following:



3. Click **Create Envelope**.

The following window is displayed:



4. Type in a name for the envelope.

We recommend that you use the envelope size as its name, for example, A4. If you are creating an option for an A4 envelope with an address window, we suggest using A4\_window or something similar.

5. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

## Creating Mail Classes

To create a mail class option, follow the procedure below. This is similar to the procedure for [Creating Envelopes](#) on page 66.

**Note:** Only options describing available Mail Classes, for example, 1st or 2nd Class, Signed For. If you create an option for which there is no postal service equivalent, the bundle will fail.

1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the **Bundling** page.

3. Click **Mail Classes** to open the page.
4. Click **Create Mail Class**.
5. In the newly opened window type in a name for the Mail Class.

We recommend that you use the name of the mail class, for example, 2nd Class.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

## Creating Paper

To create a Paper option, follow the procedure below. This is similar to the procedure for [Creating Envelopes](#) on page 66.

**Note:** Only options describing Paper available on the printers to which you have access should be created. If you create an option for which there is no available physical paper equivalent, the bundle will fail.

1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the **Bundling** page.

3. Click **Paper** to open the page.
4. Click **Create Paper**.
5. In the newly opened window type in a name for the Paper.

We recommend that you use the name of the paper, for example, Letter.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

## Creating Plex

To create a Plex option, follow the procedure below. This is similar to the procedure for [Creating Envelopes](#) on page 66.

**Note:** Only options describing plex options available on the printers to which you have access should be created. If you create an option for which there is no available plex equivalent, the bundle will fail.

1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the **Bundling** page.

3. Click **Plex** to open the page.
4. Click **Create Plex**.
5. In the newly opened window type in a name for the Plex.

We recommend that you use the name of the Plex, for example, Simplex, Duplex.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

## Creating Color

To create a Color option, follow the procedure below. This is similar to the procedure for [Creating Envelopes](#) on page 66.

**Note:** Only options describing color options available on the printers to which you have access should be created. If you create an option for which there is no available color equivalent, the bundle will fail.

1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the **Bundling** page.

3. Click **Color** to open the page.
4. Click **Create Color**.
5. In the newly opened window type in a name for the Color.

We recommend that you use the name of the Color, for example, Color, Black and White.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

## Creating Inserts

To create a Inserts option, follow the procedure below. This is similar to the procedure for [Creating Envelopes](#) on page 66.

**Note:** Only options describing inserts available on the inserters to which you have access should be created. If you create an option for which there is no available insert equivalent, the bundle will fail.

1. Click  in the left-hand side panel.
2. Click **Bundling**.

This opens the **Bundling** page.

3. Click **Inserts** to open the page.
4. Click **Create Inserts**.

5. In the newly opened window type in a name for the Inserts.

We recommend that you use the name of the Inserts.

6. Click **Create**.

The window is closed and the new option is shown in the table. It is now available for selection when creating a bundle.

# 8 - Desktop Client

This section describes the functions, installation and use of the Relay Communications Hub Desktop Client. The Desktop Client uses a hot folder, which has a `\download\print streams` sub-folder where all print streams are downloaded.

## Note:

- The operation of the Desktop Client operation is assigned to one named user within your company during configuration of your Relay Communications Hub by Pitney Bowes. This user is known as the Service User and is responsible for downloading all the print streams for your company. The duplication of downloaded, and subsequent printing, of print streams is avoided by allowing only one person this role. The Service User may hold additional roles.
- You may wish to automate the process of moving print streams from the Desktop Client hot folders to your printer. This is not within the remit of Pitney Bowes, however we may be able to help with this process if changes are required to your configuration of Relay Communications Hub.
- If you are using Microsoft Word to create your document files, please refer to [Configuring Microsoft Word](#) to ensure you achieve the best output.
- Service Users are able to upload jobs in addition to downloading print streams.

## In this section

---

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| Downloading the Desktop Client        | 72 |
| Unpacking the Desktop Client zip file | 74 |
| Installing the Desktop Client         | 75 |
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## Hot folders

This section describes the Hot folder structure. The location of the Hot folder is defined during **configuration**.

The file structure is as follows, in the example the Hot folder `C:\RCH-Desktop Client` has been assumed, but you will need to replace this with the path to your own Hot folder:

```
C:\RCH-Desktop Client
  \upload
    \<Template name>
      \_completed
  \download
    \<Template name>
```

The `\upload` folder contains a separate folder for each Template.

Your document is placed in one of the Template folders. For example:

```
C:\RCH-Desktop Client\upload\<Template name>
```

Once the Template has been applied and processing is complete, a PDF of the document can be found in:

```
C:\RCH-Desktop Client\upload\<Template name>\_completed
```

The downloaded file can be found in the Template's sub-folder of the `\download` folder:

```
C:\RCH-Desktop Client\download\<Template name>
```

The Templates available to you are tailored to your companies needs. For this reason, we cannot name the Hot folder for each or what the Template does as this is a general release document and is distributed to all Relay Communications Hub Desktop Client users. We have, therefore represented the Template hot folders with the names W1 through to W9. When using your Templates, you may have a greater or lesser number available to you and the names of the folders will be more descriptive, giving the purpose of that each.

## Downloading the Desktop Client

**Note:** This function is only available to Chief Operators and Administrators.

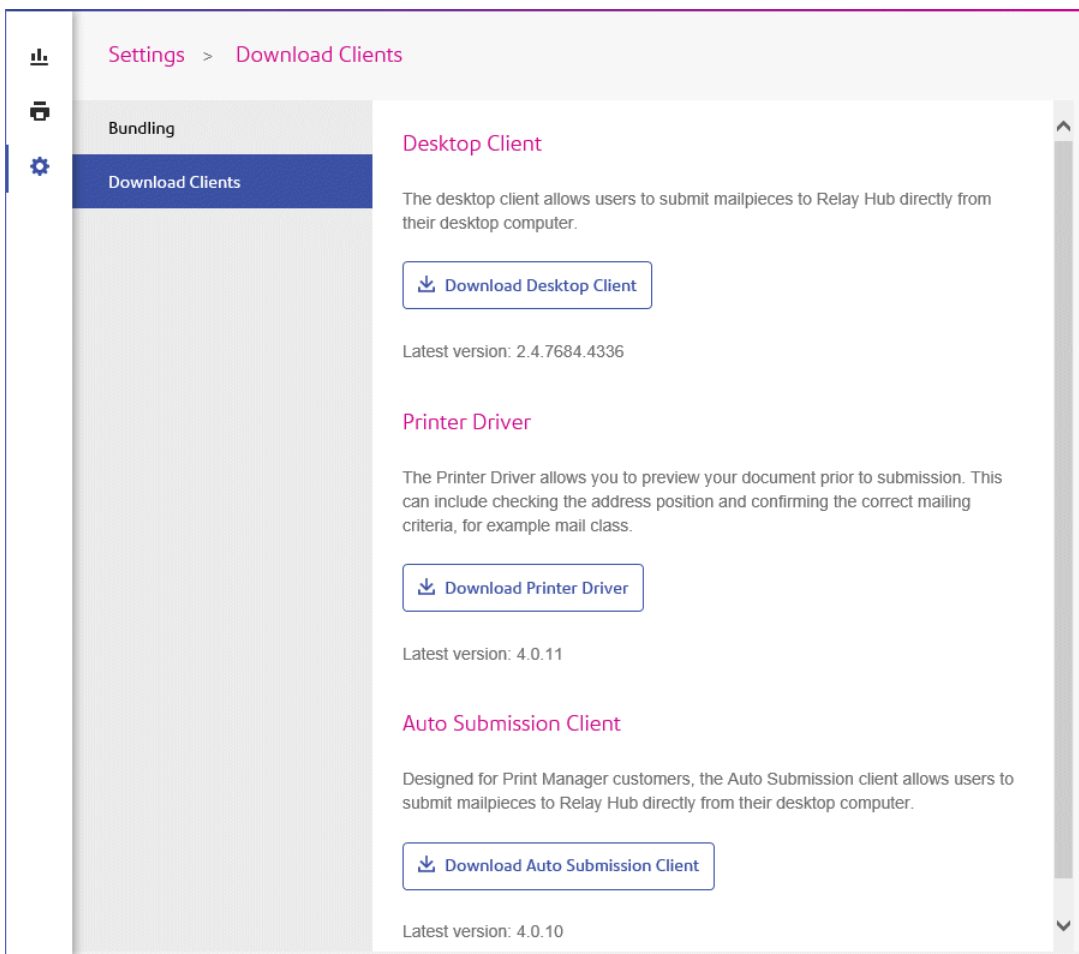
**Warning:** In order to run the Desktop Client, Java JDK 1.8 must be present on your machine.



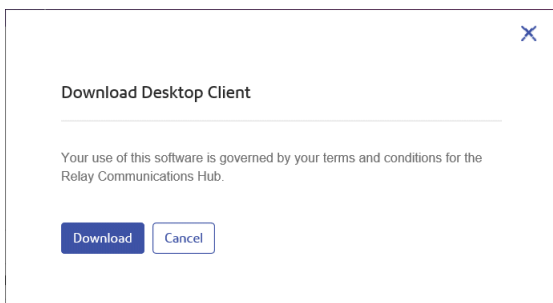
Once you have signed in to the Relay Communications Hub Web Client, follow the procedure, below:

1. Click  in the left-hand side panel.
2. Click **Download Clients**.

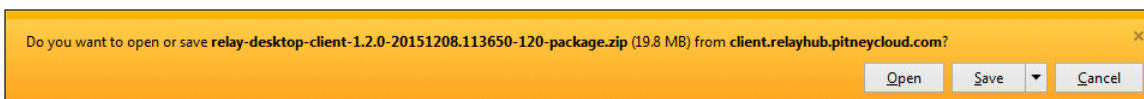
This opens the **Settings** page, shown below:



3. Click **Download Desktop Client**.
4. The following window is displayed, click **Download**.



5. In the **Download** dialog, shown below for Internet Explorer, click  on the **Save** button.



6. From the resultant menu select **Save as**.

We strongly recommend that you create a new folder solely for the use of this file and its contents.

7. In the **Save as** dialog navigate to the required location and click **Save**.

Then a zip file of the install files is downloaded into the specified location.

## Unpacking the Desktop Client zip file

To unpack the zip file, you need follow the procedure, below:

1. Navigate to the location in which you saved the zip file.

The file name is in the following format:

```
relay-desktop-client-<version>.<date>.<time>.<build>-package.zip
```

For example:

```
relay-desktop-client-2.4.0-20180118.100634-120-package.zip
```

2. Right-click on the downloaded file and from the resultant menu click **Extract here**.

The files named similarly to the following are unzipped to the current location:

- log.xml
- nssm.exe
- relay-desktop-client-2.4.0-SNAPSHOT.jar
- run.bat
- run.sh
- service.bat
- subinacl.exe

These files are now ready to use for installing the Desktop Client.

## Installing the Desktop Client

This section describes how to install the Desktop Client. Once you have completed the installation process, the Desktop Client window is automatically opened.

Shutting down or logging out of your machine also closes the Desktop Client.

1. From the **Start** menu find the **Command Prompt**.

For example, in Windows 10 open the following from the **Start** menu:

**All Apps | Windows System | Command Prompt**

2. Right-click the **Command Prompt**.
3. From the resultant menu select **Run as Administrator**.

This opens the **Command Prompt**.

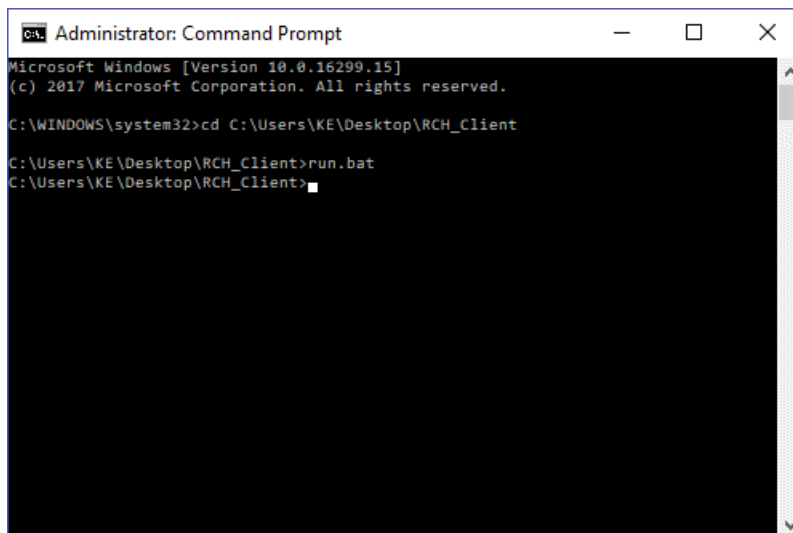
4. Type `CD` followed by the path to the folder used when [Downloading the Desktop Client](#) on page 72 and press **Enter**.

For example: `cd C:\Relay Desktop Client`

**Note:** There is a space between the `cd` and the `c`.

5. Type in `run.bat` and press **Enter**.

An example is shown below:



```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.16299.15]
(c) 2017 Microsoft Corporation. All rights reserved.

C:\WINDOWS\system32>cd C:\Users\KE\Desktop\RCH_Client

C:\Users\KE\Desktop\RCH_Client>run.bat
C:\Users\KE\Desktop\RCH_Client>
```

6. A window confirming successful installation is displayed. Click **OK**.

The Desktop Client is opened:

## Relay™ Communications Hub

### Relay Desktop Client

Email

Password

Enter your Relay Hub password.

Re-enter Password

Server URL

Enter your Relay Hub server URL of your region.

Hot Folder Path

Browse

Choose your Relay Hub hot folder path...

☒ Auto Start

Start Service

Restart Service

7. Click **Install Service**.

Continue with [First time sign in](#) on page 76

## First time sign in

You must complete the fields in the Relay Communications Hub Desktop Client window in order to use the Hot folder functionality as shown below:

# Relay™ Communications Hub

## Relay Desktop Client

Email

Password

Enter your Relay Hub password.

Re-enter Password

Server URL

Enter your Relay Hub server URL of your region.

Hot Folder Path

Choose your Relay Hub hot folder path...

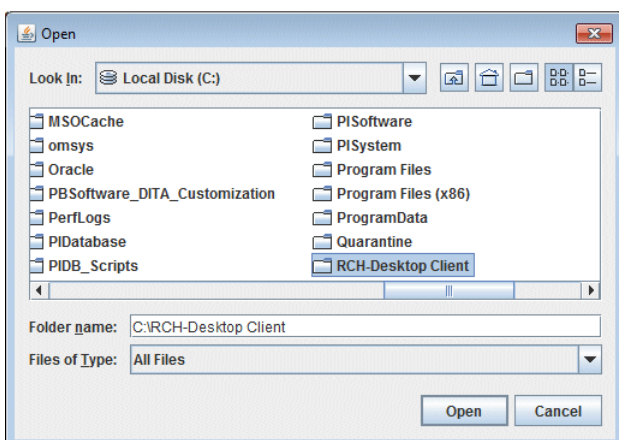
Browse

☒ Auto Start

Start Service

Restart Service

1. Complete the **Email**, **Password** and **Re-enter Password** fields with your Relay Communications Hub credentials.
2. From **Server URL** select the relevant option for your region from those listed:
  - Relay US Region
  - Relay CA Region
  - Relay EU Region
3. Click **Browse** and in the **Open** dialog specify hot folder to be used and click **Open**.



4. If you wish the service to automatically restart when the machine is started, check **Auto Start**.
5. Click **Start Service**.
6. A dialog advising that the Desktop Client is started is displayed, click **OK** to confirm.

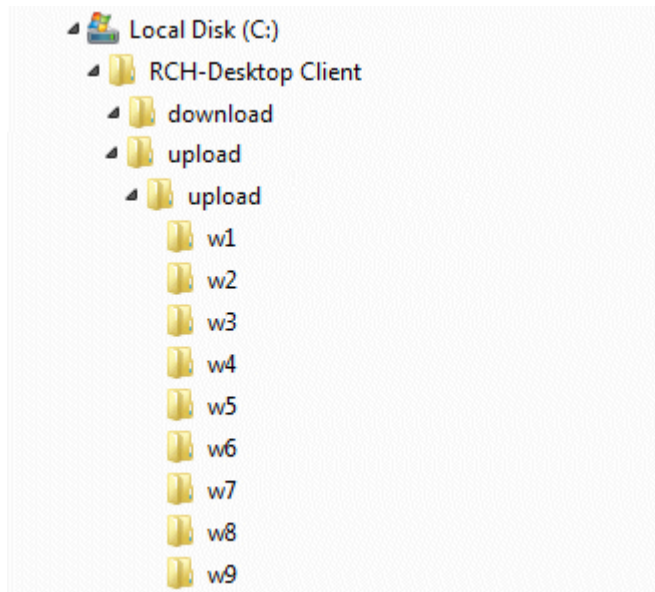
The Hot folder is now ready to use. The **Start Service** button is now shown as **Stop Service**, which when clicked stops the service running. It can be started by clicking **Start Service**. If you did not select **Auto Start** click **Restart Service** if it has been stopped during machine shut down or other reason.

## Desktop Client's Hot folders

Once you have completed the steps in the previous chapter, the Hot folder is ready for use. If you navigate to the location specified during configuration, you will find that the Hot folder contains a sub-folder called `\upload`. If you open this folder, you will find further folders, which is populated from your current template list found in the Web Client.

A sub-folder called `\download` is only visible when there are files available to download.

An example of the initial folder structure is as follows, your folders will have folder names representing your template list. In the example the Hot folder `C:\RCH-Desktop Client` has been assumed, but you will need to replace this with the path to your own Hot folder:



## Using the upload Hot folder

If you are using Microsoft Word to generate your documents for upload to the Desktop Client, see [Configuring MS Word](#) on page 81 for information on how to format for best output.

Before you begin this process, the following is assumed:

- the fields described in [First time sign in](#) have been specified
- the `run.bat` file is running
- the document you wish to upload is complete and is in PDF format

Follow the procedure below:

1. Navigate to the required Template folder in your Hot folder's `\upload` folder.

The Templates are described later in this section.

2. In a separate window, navigate to the location in which your document resides.
3. Either:

- Drag and drop your document into the Template folder, or
- Cut and paste your document into the Template folder.
- Alternatively, you may save your document directly into the required folder.

Once processing is complete, a PDF of your document with the Template applied can be seen in the `\_completed` folder for the Template.

4. Navigate to the `\download` folder and open its relevant Template folder.

When it is ready, your document, with the Template applied, is available here.

**Note:**

It may take a little time before your document is available in this folder.

## Updating the Desktop Client

To update the Desktop Client to the latest version, follow the procedure, below:

1. Using the instructions in [Downloading the Desktop Client](#) on page 72 download the latest version.
2. Using the instructions in [Unpacking the Desktop Client zip file](#) on page 74 unpack the latest version.

**Note:** this must be different from the folder in which the current Desktop Client resides.

3. Using the instructions in [Installing the Desktop Client](#) on page 75 open the Desktop Client from current desktop client package.

The Desktop Client is opened:

**Relay™ Communications Hub**

**Relay Desktop Client**

Email

Password

Re-enter Password

Enter your Relay Hub password.

Server URL

Relay EU Region

Enter your Relay Hub server URL of your region.

Hot Folder Path

C:/RCH-Desktop Client

Browse

Choose your Relay Hub hot folder path...

☒ Auto Start

Stop Service Restart Service

4. Ensure that no input file is being processed by the Desktop Client.



5. Click **Stop Service** and for the service to stop.
6. Navigate to the folder in which the latest Desktop Client, unpacked in step #2, resides.
7. copy the file `relay-desktop-client-X.X.X-SNAPSHOT.jar` and copy it into the folder in which the current Desktop Client resides.
8. A **Replace or Skip Files** dialog is displayed, select **Replace the file in the destination**.
9. In the **Desktop Client** click **Start Service**.

The Desktop Client is now the latest version and you may continue using it to process jobs.

## Configuring MS Word

MS Word 2007/2010 needs to be configured to ensure that the page size and fonts are used.

### Page Sizing

MS Word 2007/2010 needs to be configured to ensure that the page size specified during document creation is honored in Relay Communications Hub. The default MS Word 2007/2010 settings cause all documents to be sent as either size A4 or 8.5" x 11".

This setting needs to be changed to allow documents to be submitted with the correct page size. To do this, follow the procedure, below:

1. Open MS Word 2007/2010.
2. From the **File** menu select **Options**.
3. From the resultant dialog select **Advanced**.
4. Scroll down until the **Print** section is visible.
5. Deselect **Scale** content for A4 or 8.5 x 11 paper sizes.
6. Click **OK**.

This should ensure specified page sizes is honored.

### Embedding Fonts

Fonts need to be embedded in your Microsoft Word 2007/2010 document to ensure they print correctly. MS Word only fully supports embedding of TrueType and OpenType fonts. Text using other font types may end up as an image rather than text which is likely to cause issues when trying to submit those documents to Relay Communications Hub. One such issue is not being able to

extract a recipient's postal address from your document and hence not being able to submit the document to Relay Communications Hub at all.

To do this, follow the procedure, below:

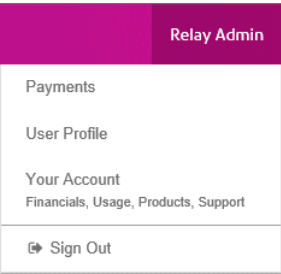
1. Open MS Word 2007/2010.
2. From the **File** menu select **Options**.
3. From the resultant dialog select **Save**.
4. Scroll down until the **Preserve fidelity when sharing this document** section is visible.
5. Select **All Documents**.
6. Select **Embed fonts in the file**.
7. Select **Do not embed common system fonts**.
8. Click **OK**.

All embedded font should now print correctly.

# 9 - Administrating Relay Communications Hub

If you have an Administrator role or permissions, you may have access to the Administration menu, available by clicking your user name in the top right-hand of the page. In the following example, the user name is Relay Admin, click this to open the menu.

It has three options, shown next:



These options provide the tools for administration of the Relay Communications Hub, including the following:

- Viewing and changing you user profile
- Signing out of Relay Communications Hub

## In this section

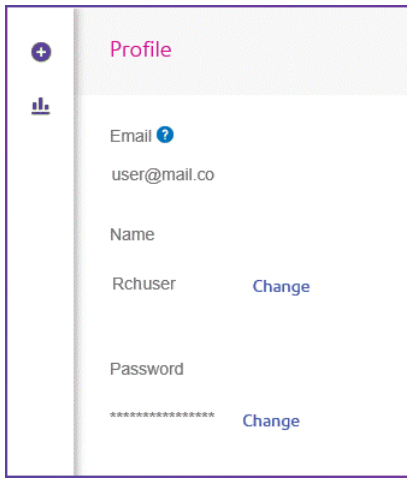
---

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## Editing your profile

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

The following is displayed:



| Profile      |                        |
|--------------|------------------------|
| Email ?      |                        |
| user@mail.co |                        |
| Name         |                        |
| Rchuser      | <a href="#">Change</a> |
| Password     |                        |
| *****        | <a href="#">Change</a> |

Your email address, user name and password are given.

[Changing Your Name](#) on page 84 and [Forgotten your password?](#) on page 19 are covered next.

**Note:** You can change you user name and password but not both at the same time. Complete the process for one and then for the other.

## Changing Your Name

To change your name:

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

The following is opened:

**Profile**

Email ⓘ  
user@mail.co

First Name  
Admin

Last Name  
user

Save Cancel

Password  
\*\*\*\*\* Change

2. Type in a new value for **First name**.
3. Type in a new value for **Last name**.
4. Click **Save**.

Once you click **Save** your new user name is shown in the **Profile** page.

## Changing Your Password

**Note:** See [Signing In For The First Time](#) on page 16 for a list of password criteria.

To change your password:

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

The following is opened:

**Profile**

Email ⓘ  
user@mail.co

Name

Rchuser [Change](#)

Old Password

ⓘ

Please provide a valid password.

New Password  ⓘ

Re-enter password  ⓘ

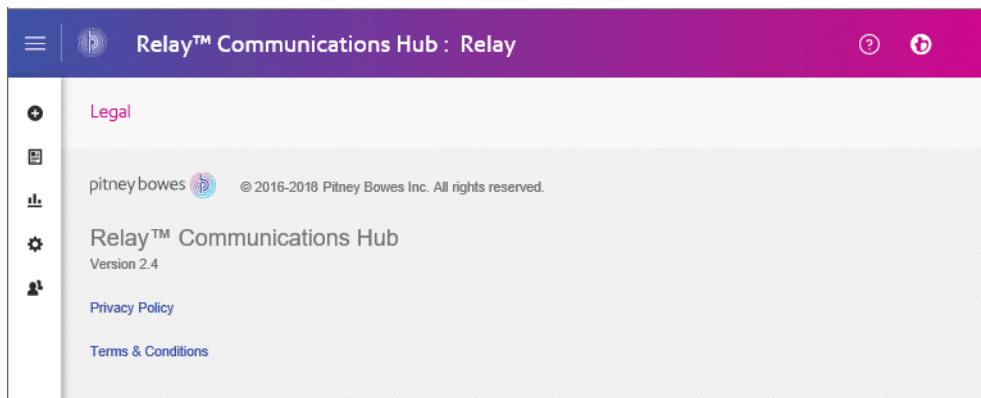
[Save](#) [Cancel](#)

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

Once you click **Save** your new user name is shown in the **Profile** page.

## Viewing Version Information

To view the Relay Communications Hub version, click your user name in the header and select **About** from the menu. The following is displayed:



this page has the following links:

|                    |                                        |
|--------------------|----------------------------------------|
| Pitney Bowes logo  | Takes you to the Pitney bowes website. |
| Privacy policy     | Opens the Privacy Statement.           |
| Terms & Conditions | Opens the Terms of User.               |

## 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.

# 10 - Glossary

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

## In this section

Terms and Definitions

89



## Terms and Definitions

|                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Administrator</b>       | The person responsible for the administration of Relay Communications Hub. These responsibilities include creating users, defining the organization hierarchy and specifying bundle criteria.                                                                                                                                                                                                                                                                                                                |
| <b>Attachments</b>         | A PDF file uploaded into Relay Communications Hub and selected in the Printer Driver. This is attached to each mail piece in the job at the time of printing, mailing or archiving.                                                                                                                                                                                                                                                                                                                          |
| <b>Bundle</b>              | <p>A bundle is group attributes which define a print stream, for example, color, page size. The name of the bundle is automatically generated when the bundle is created and is made up of the attributes selected. For example:</p> <p>C5, Duplex, Black &amp; White, A4, 2nd Class, No Insert</p> <p>This bundle has grouped together all jobs which are to be printed double-sided (duplex), on A4 paper and to be posted in a C5 envelope as 2nd class without the inclusion of pre-printed inserts.</p> |
| <b>Concatenation</b>       | The grouping of individual jobs into one print stream. Jobs are concatenated by bundle, a number of common attributes.                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Download</b>            | The print stream is transferred from Relay Communications Hub on to the printer.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Mailing Envelopes</b>   | Envelopes in which printed mail pieces are inserted for mailing. These are usually defined by physical size.                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Job</b>                 | This is submitted by a user and consists of a number of mail pieces/letters. Letters may have been mail merged within Microsoft Word and submitted to Relay Communications Hub through the Printer Driver.                                                                                                                                                                                                                                                                                                   |
| <b>Mailing Services</b>    | The service used to send printed mail pieces.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Mail piece</b>          | A single letter to one recipient. Mail pieces are concatenated or mail merged into Jobs and then submitted to Relay Communications Hub by users.                                                                                                                                                                                                                                                                                                                                                             |
| <b>Operator</b>            | The person creating triggers to automate printing of print streams in addition to manually triggering printing.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Pre-Printed Inserts</b> | A physical published document inserted into the envelope with the mail piece at the time of printing.                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Print Stream</b>        | A concatenation of individual jobs into one larger file for printing.                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Release</b>             | The process of starting the download of the print stream from Relay Communications Hub on to the printer.                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Role</b>                | A group of settings which define user permissions and access to parts of the user interface and facilities.                                                                                                                                                                                                                                                                                                                                                                                                  |

|                    |                                                                                                                                                                                 |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sheet Stock</b> | In the case of Physical stock, this is the paper on which mail pieces are printed. Otherwise, this is a PDF of headed paper or a form which is over-layed onto the mail pieces. |
| <b>Trigger</b>     | The means by which print streams are sent to print. Triggers can be set to run at specified times on when the number of pages or mail pieces exceeds that specified.            |
| <b>User</b>        | The person submitting individual jobs to Relay Communications Hub for printing.                                                                                                 |

# 11 - More Information

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