

Hybrid Mail Service

Web Interface User Guide

Foreword

In this section the following information is included:

- About this User Guide and Help
- Terminology
- Sub Headings
- Further Reading

About this User Guide and Help

The Xerox Hybrid Mail Service Web Interface user guide and Help provide detailed instruction about how to operate the web interface; from logging in, to composing mail, and performing print room and administrator tasks, it is designed as an everyday reference for beginners and experts alike.

The user guide and Help assume you have knowledge of your computer's operating system and its conventions, including how to use a mouse and how to open and use an Internet browser. For help with any of these techniques please refer to your operating system's documentation or Help.

Terminology

The table below provides details about the terminology used throughout the Xerox Hybrid Mail Service Web Interface user guide and Help.

TERM	DESCRIPTION
Click / Left-click	Press the primary mouse button (default = left).
Customer barcode (CBC)	A barcode that can appear near the recipient address of a mail piece. The barcode contains a start character, the postcode and delivery point suffix (DPS) of the recipient, a checksum character, and a stop character. It can be read at high speed by Royal Mail sorting machines.
Delivery point suffix (DPS)	A two-character code (one numeric, the other alphabetical) contained in a customer barcode (CBC). It is used to identify each address in a postcode.
Highlight	The process of selecting text so the font, size, style and alignment can be changed. Click the mouse button at the start of the text, hold the button, drag the mouse until all the text that needs to be changed is highlighted then release the button.
Mail / Mail piece	Contains a compulsory letter or postcard created using the web interface and optional attachments (PDF or XML files) created using third-party applications.
Output	The process of printing, writing to file, emailing or relaying mail to another mail server. Also refers to the device or object where mail is output such as a printer, file, email and relay server.
Output file	A PDF file that is created when mail is moved to an output queue. The maximum number of mail pieces each output file contains is dependent on the type of sort selected for the associated output queue. Adding multiple mail pieces to a single PDF improves output performance and enables mail with the same SSC to be accumulated and output together.
Post	The process of sending/transmitting mail composed using the web interface to the Xerox Hybrid Mail Service server where it is managed and output.
Standard Selection Code (SSC)	A five-digit code that can appear near the recipient address of a mail piece to identify the Royal Mail delivery office the mail piece is sent to prior to delivery. The code is only added when certain Royal Mail Mailsort services are used.

Sub Headings

The following headings are used to indicate cautions, examples, notes and where further information about a topic can be found:

CAUTION: Identifies an action or omission that may cause loss or damage to equipment, software or data.

EXAMPLE: Provides an example of what has just been described.

MORE: Indicates where further information about the current topic can be found.

NOTE: Provides additional information or hints to assist in performing a task or understanding the current topic.

Further Reading

The following Xerox Hybrid Mail Service documentation and Help is also available:

- Xerox Hybrid Mail Service Print Client user guide
- Xerox Hybrid Mail Service Print Client Help
- Xerox Hybrid Mail Service API user guide
- Xerox Hybrid Mail Service API Client user guide
- Xerox Hybrid Mail Service installation guide

Documentation can be downloaded by visiting the following web page:

http://funasset.com/support/downloads_guides.asp



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To help you quickly find information about a topic, the following contents are provided:

- At a Glance
- Concise

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Introduction

In this section the following information is included:

- Overview
- Operation
- Components
- Modules

Overview

Xerox Hybrid Mail Service provides a simple and accessible way for anyone in an organisation to prepare, manage and post their mail, while minimising manual intervention, reducing postage overheads, and ensuring documents are secure and adhere to corporate identity.

Three Xerox Hybrid Mail Service components are available – a web interface where mail can be prepared and managed in an Internet browser; a print client that can be used to post mail from any Windows application that can print; and a drop folder (API) that allows users to integrate the functionality of Xerox Hybrid Mail Service with their own applications.

Optional modules are also available that enhance the functionality of Xerox Hybrid Mail Service.

Operation

Whether you decide to use the web interface, the print client or the drop folder (API), mail is posted to an in-house or off-site Xerox Hybrid Mail Service server.

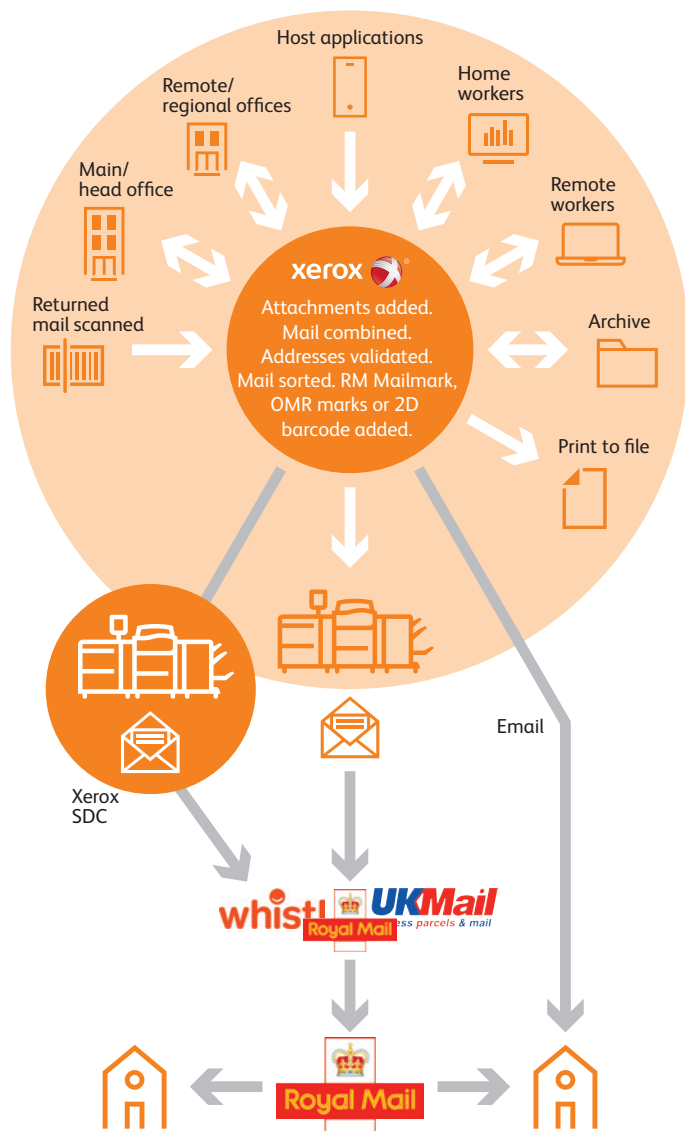


Fig. 1 Xerox Hybrid Mail Service operation

Mail successfully posted to the Xerox Hybrid Mail Service server has the following processes performed on it:

1. If necessary, the mail is converted to a PDF file.
2. If necessary, attachments are appended to the PDF file.
3. The mail is assigned to an output queue.
4. The mail is sorted for Royal Mail discount and necessary mail marks and barcodes are applied.
5. If configured, mail for the same recipient is combined and OMR marks or a 2D barcode are added so a folder inserter can be used.
6. The mail is automatically released (when enough mail has accumulated) or manually released by an operator from the output queue to an output such as a printer, file, third-party print facility or email.

An archive copy of the mail is also created for viewing at any time in the web interface.

If mail fails to be delivered to the recipient, it is returned by Royal Mail to a designated return address then scanned by an operator. As a result, the associated mail in Xerox Hybrid Mail Service is flagged as returned so the recipient details can be corrected and the mail prepared and posted again.

Components

Three Xerox Hybrid Mail Service components are available:

- Web interface
- Print client
- Drop Folder (API)

WEB INTERFACE

The web interface enables mail to be composed then posted to the Xerox Hybrid Mail Service server using an Internet browser. It can also be used by administrators to administer groups, users, attachments, backgrounds, templates and output queues, and by operators to perform print room tasks such as combining, sorting, releasing output queues, and scanning returned mail.

PRINT CLIENT

The print client is designed to be used with any Windows application that can print. It operates in a similar way to a normal printer driver but instead of printing documents it posts them to a specified output queue on the Xerox Hybrid Mail Service server ready for printing.

It can also be used by presenting PDF files and Word files directly to it.

MORE: For instruction about the print client, refer to the Xerox Hybrid Mail Service Print Client user guide or Help.

DROP FOLDER (API)

The drop folder (API (Application Programming Interface)) enables third-party applications to access the functionality of Xerox Hybrid Mail Service.

MORE: For further instruction about the drop folder, refer to the Xerox Hybrid Mail Service Drop Folder Manager user guide and the Xerox Hybrid Mail Service Drop Folder API user guide.

Modules

Xerox Hybrid Mail Service can have the following optional modules installed:

MODULE	DESCRIPTION
Combiner	Combines mail destined for the same recipient.
Mail Markup	Adds OMR marks and 2D barcodes to mail so it can be used with a folder inserter.
Mailsort	Sorts mail so Royal Mail discount can be achieved.
Address Cleanser	Checks if the recipient address and post code are valid for a mail piece.

NOTE: The licence key applied during the licensing process, determines the modules that can be used with Xerox Hybrid Mail Service.

Getting Started

In this section the following information is included:

- System Requirements
- Launching (Running)
- Logging In
- Enabling Browser Pop-ups
- Mail Considerations
- Workspace Overview
- Viewing and Modifying Your User Details
- Refreshing Page Information
- Uploading Files
- Downloading Assets
- Viewing Version and Developer Information
- Logging Out
- Getting Help

System Requirements

The web interface has the following system requirements:

- Computer with Internet access
- Microsoft Internet Explorer 8 or above, Firefox, Safari, Chrome
- Internet browser scripts enabled*
- Internet browser pop-ups enabled^
- PDF application (for previewing mail, viewing archive mail, and viewing attachments)

***MORE:** For details about enabling scripts, consult your Xerox Hybrid Mail Service administrator or refer to your Internet browser's documentation or Help.

^MORE: For details about enabling pop-ups, refer to Getting Started > Enabling Browser Pop-ups.

Launching (Running)

The web interface is launched (run) by opening the Xerox Hybrid Mail Service shortcut normally located on your Windows desktop or by specifying the Xerox Hybrid Mail Service URL in your Internet browser. If a shortcut is not available or you do not know the Xerox Hybrid Mail Service URL, please consult your Xerox Hybrid Mail Service administrator.

The first page opened is where you login to the web interface.

Logging In

After launching the web interface the Login page (Fig. 2) is opened.

Fig. 2 Login page

The Login page is where you specify your Xerox Hybrid Mail Service user name and password (normally supplied to you by your Xerox Hybrid Mail Service administrator) in order to gain access to facilities in the web interface.

Type your user name in the User Name edit box (Fig. 9) and your password in the Password edit box then click the Login button. If login is successful, the Home page (Fig. 3) is normally opened.

NOTE: If you are a Xerox Hybrid Mail Service administrator and no other administrator from your organisation has logged into Xerox Hybrid Mail Service and updated the organisation details since the web interface was installed, the first page opened is the Organisation Details page (Fig. 87). It is advised you complete the settings on this page before proceeding.

Enabling Browser Pop-ups

The web interface uses browser pop-ups to display information such as attachments. If your Internet browser is not configured to display pop-ups, a notification dialog (Fig. 16) informing you of this is opened each time the Login page (Fig. 2) is opened.

MORE: To enable pop-ups, consult your Xerox Hybrid Mail Service administrator or refer to your Internet browser's documentation or Help.

LOGIN PERIOD

The length of time you remain logged into the web interface is dependent upon your activity within it. If you remain inactive (i.e. do not open another page) for more than an hour (or the length of time your Xerox Hybrid Mail Service server is configured for) you are automatically logged out.

NOTE: Even though you are logged out, the Login page (Fig. 2) is not displayed until you attempt to open another page from the page you are currently on.

CAUTION: If you remain on the Compose Mail page (Fig. 51) for more than an hour (or the length of time your Xerox Hybrid Mail Service server is configured for), you are automatically logged out and will lose the content of the associated mail up to the point of the last save. It is therefore advised you frequently save your mail as Draft mail so you can return to it if you are logged out.

RETRIEVING YOUR USER NAME AND PASSWORD

If you have forgotten your Xerox Hybrid Mail Service user name or password, or both, you can retrieve them by submitting the email address associated with your Xerox Hybrid Mail Service user account.

On the Login page (Fig. 2), type your email address in the Email edit box (Fig. 9) then click the Submit button. If the specified email address is found, your user name and password are emailed to you.

Mail Considerations

Mail produced by Xerox Hybrid Mail Service consists of an obligatory letter and optional attachments. Letters are written using the web interface, and attachments you wish to include are appended during the compose process or when a template is created.

Prior to viewing, composing and posting mail or creating a template, it is important to consider the following:

- Status
- Page size
- Page orientation
- Number of sheets
- Recipient name and address, barcode and postal zone
- OMR marks
- Printer margins
- Checks

STATUS

The status of mail can change many times.

The table below describes each status:

STATUS	DESCRIPTION
New	Mail that is being composed and before it is saved or posted.
Draft	Mail that has been saved so it can be modified and posted at a later date/time. Draft mail appears on the Draft Mail page (Fig. 61).
Pending	Mail that has been saved so it can be posted simultaneously with other mail at a later date/time. Pending mail appears on the Pending mail page (Fig. 62).
Queued	Mail that appears in the Input queue.
Waiting for Sorting	Mail that has been released from the Input queue and is waiting to be sorted.
Archive	Unsorted mail that has been successfully output. Archive mail appears on the Archive Mail page (Fig. 64) and can also be viewed for each user by Xerox Hybrid Mail Service administrators.
Archive Sorted	Sorted mail that has been successfully output. Archive Sorted mail appears on the Archive Mail page and can also be viewed for each user by Xerox Hybrid Mail Service administrators.
Exception	Mail that exceeds the Max Sheets setting becomes Exception mail. Exception mail appears in the Exception queue on the Output Queues page (Fig. 91).

Returned	Mail that is undeliverable and has been returned by Royal Mail to a location specified by your organisation (normally indicated on the reverse of the envelope). After being returned it is scanned and the associated mail in Xerox Hybrid Mail Service becomes Returned mail. Returned mail appears on the Returned Mail page (Fig. 67) and can also be viewed for each user by Xerox Hybrid Mail Service administrators.
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PAGE SIZE

The size of letters created on the Compose Mail page (Fig. 51) is determined by the selected template.

PAGE ORIENTATION

The orientation of letters created on the Compose Mail page (Fig. 51) is determined by the selected template. If you intend to include attachments, they can be portrait or landscape. However, if an attachment is landscape the content is rotated to portrait prior to printing.

NUMBER OF SHEETS

The envelopes mail is delivered in have a physical limit on the number of sheets they can contain. To help enforce this maximum, each envelope associated with the template used by a mail piece has a Max Sheets setting.

CAUTION: When mail exceeds the number of sheets limit, a notification dialog (Fig. 16) is opened when an attempt to post it is made.

RECIPIENT ADDRESS AND POSTCODE, MAILMARK™, SSC, LETTER ID AND CBC

The recipient's address and postcode, Mailmark™ barcode, Standard Selection Code (SSC), Letter ID barcode and Customer Barcode (CBC) are printed on page one of each mail piece.* To prevent these details being obscured, the content of the mail piece or the content of pre-printed stationery must avoid the areas where they appear.

CAUTION: The area where these details appear is determined by the envelope associated with the template used by mail.

***NOTE:** Not all of these elements may be present on a mail piece.

FOLDER INSERTER MARKS AND BARCODE CHECKS

In order for folder inserter equipment to select the correct number of sheets to be folded and inserted in an envelope, OMR marks or a 2D barcode are applied to the leading page of each sheet that makes up a mail piece.

NOTE: The Mail Markup module must be installed and enabled for OMR marks or a 2D barcode to be applied.

To prevent the OMR marks or 2D barcode being obscured, the content of a mail piece (including attachments) or the content of pre-printed stationery must avoid the area where they appear.

CAUTION: The default position and area where the OMR marks and a 2D barcode appear is determined by how they were configured using the Mail Markup module. It is therefore advised you consult your Xerox Hybrid Mail Service administrator prior to posting.

PRINTER MARGINS

If mail is to be printed, it is likely the printer it is output on has physical margins where printing cannot occur. Therefore, if the background used for a letter or any appended attachment contains edge-to-edge content this content will not be printed in the printer margin.

MORE: For further details about printer margins, refer to your printer's documentation or consult your Xerox Hybrid Mail Service administrator.

Prior to previewing, posting and saving mail as Pending mail, the following checks are made:

- Recipient name and address checked for content
- Recipient postcode checked against the Royal Mail's database for accuracy
- Letter body checked for content
- Mail name checked for content

If any of the checks fail, a notification dialog (Fig. 16) is opened that describes the problem.

NOTE: If a CSV file is used, the notification dialog contains a list of the first ten problematic recipient addresses. You need to correct these in the CSV file (and the data source) then attempt to preview, post or save the associated mail again before correcting further addresses if necessary.

Prior to using a CSV file, it is advised you use the postcode checking facility to analyse and report recipients containing a problematic postcode.

MORE: For details about the postcode checking facility, refer to Composing and Posting Mail – Specifying Recipient Details > Checking Postcodes.

Workspace Overview

The Xerox Hybrid Mail Service web interface (Fig. 3) contains functionality for composing and posting mail, and performing print room and administrator tasks.

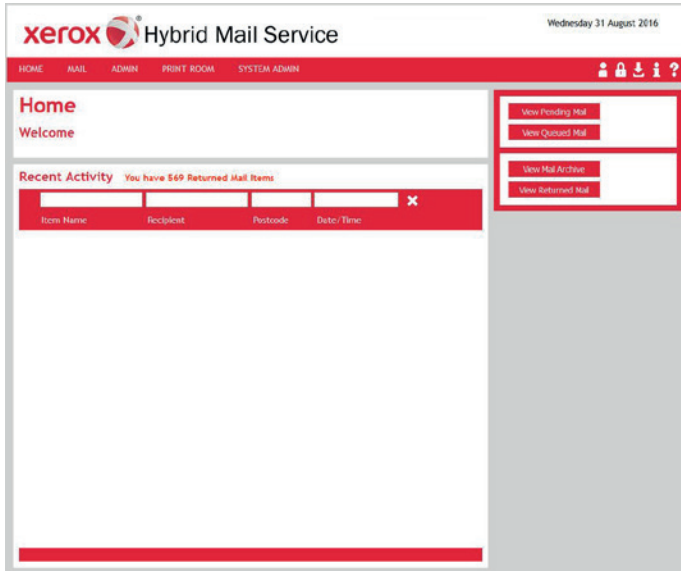


Fig. 3 Xerox Hybrid Mail Service web interface workspace (Home page)

After logging in, the Home page is normally the first page opened, and the layout and style of all other pages mirrors this.

NAVIGATING

Web interface facilities are accessed using the menus and buttons found near the top of each page.

Using the Menus

The web interface contains the following menus:

- Home
- Mail
- Admin (administrators and system administrators only)
- Print Room (operators, administrators and system administrators only)
- System Admin (system administrators only)

If a menu contains options, placing the mouse pointer over its name displays those options in a drop-down list (Fig. 4). Click an option, or the name of a menu that does not contain options, to navigate to the associated page.

MAIL

- Compose new letter
- View draft mail
- View pending mail
- View queued mail
- View returned mail
- View Archived Mail
- Validate Addresses

Fig. 4 Menu drop-down list (Mail)

NOTE: If a menu has a drop-down list, clicking its name has no affect.

Using the Buttons

The buttons found at the top right of each page are used to access the following pages and components:

- User Details
- Logout
- Downloads
- About Xerox Hybrid Mail Service
- Help

Click a button to navigate to the associated page or component.

SIDE PANELS

Certain pages in the web interface contain a side panel (Fig. 5).

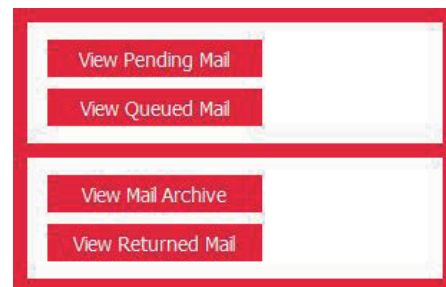


Fig. 5 Side panel

Here options, settings and buttons appear that are applicable to the page.

Conveniently, side panels remain in a fixed position for quick and easy access.

LISTS

The web interface contains lists (Fig. 6) which you may need to navigate, sort and search in order to locate then select an item they contain.

Item Name	Recipient	Postcode	Date/Time	Track
7 Good Postcodes (Ban...	Margot	DF12 1AN	2016-08-22 16:28	
7 Good Postcodes (Ban...	Chad	B39 3QG	2016-08-22 16:28	
7 Good Postcodes (Ban...	Darrell	B16 6AE	2016-08-22 16:28	
7 Good Postcodes (Ban...	Collin	B17 8NP	2016-08-22 16:28	
7 Good Postcodes (Ban...	Dwain	B18 4BG	2016-08-22 16:28	
7 Good Postcodes (Ban...	Jewel	B43 6QZ	2016-08-22 16:28	
7 Good Postcodes (Ban...	Veronica	B16 6AE	2016-08-22 16:28	
7 Good Postcodes (Ban...	Margot	DF12 1AN	2016-08-22 16:26	
7 Good Postcodes (Ban...	Chad	B39 3QG	2016-08-22 16:26	
7 Good Postcodes (Ban...	Darrell	B16 6AE	2016-08-22 16:26	
7 Good Postcodes (Ban...	Collin	B17 8NP	2016-08-22 16:26	
7 Good Postcodes (Ban...	Dwain	B18 4BG	2016-08-22 16:26	
7 Good Postcodes (Ban...	Jewel	B43 6QZ	2016-08-22 16:26	
7 Good Postcodes (Ban...	Veronica	B16 6AE	2016-08-22 16:26	
7 Good Postcodes (Ban...	Margot	DF12 1AN	2016-08-22 15:00	
7 Good Postcodes (Ban...	Chad	B39 3QG	2016-08-22 15:00	
7 Good Postcodes (Ban...	Darrell	B16 6AE	2016-08-22 15:00	
7 Good Postcodes (Ban...	Collin	B17 8NP	2016-08-22 15:00	
7 Good Postcodes (Ban...	Dwain	B18 4BG	2016-08-22 15:00	
7 Good Postcodes (Ban...	Jewel	B43 6QZ	2016-08-22 15:00	

Fig. 6 List

Navigating

Up to 20 list items are normally displayed in a list (Fig. 6). Additional items are viewed using the page number links located below lists that require them.

Click a link to open the associated page.

Sorting

By default, the content of a list (Fig. 6) is sorted by one of the columns in the list.

EXAMPLE: The list on the Draft Mail page (Fig. 61) is sorted in date descending order (i.e. latest mail piece first).

Column titles (Fig. 7) can be used to sort a list in either ascending or descending order.

Item Name	Recipient	Postcode	Date/Time	Track
-----------	-----------	----------	-----------	-------

Fig. 7 Column titles (Queued Mail page)

Click a column title to sort the list by that column. Repeated clicks toggle the order of the list between ascending and descending.

EXAMPLE: If the list on the Queued Mail page (Fig. 63) is sorted by Postcode in ascending order, and the Postcode title is clicked, the order becomes descending. Clicking it again makes the order ascending.

Searching

Certain lists (Fig. 6) can be searched in order to locate associated items. Lists that can be searched contain an edit box (Fig. 9) above each searchable column together with a Clear Search button (Fig. 8).

Fig. 8 Search edit boxes and Clear Search button (Queued Mail page)

Each edit box is where a search string that relates to the associated column is specified.

EXAMPLE: If you were looking for a particular postcode in the list on the Queued Mail page (Fig. 63), you would type the postcode in the edit box above the Postcode column.

When a search string has been specified, move the focus from the associated edit box to begin searching for the item. If the search string matches information contained in the associated column, the results are displayed in the list.

Search strings can be simultaneously specified for multiple columns.

EXAMPLE: If you were looking for all recipients with the name Smith and living in the TN5 postcode region in the list on the Queued Mail page, you would specify Smith in the Recipient Name edit box and TN5 in the Postcode edit box.

Click the Clear Search button to cancel a search and display all items in the associated list.

Search Strings

Search strings can be made up of a complete or partial text string. The more text a string contains, the narrower the search results in a list (Fig. 6) are.

EXAMPLE: A list contains three items with the following postcodes:

AB12 6CD
AB13 7CD
AB14 8DE

If AB is used as the search string, all three items would be displayed in the search results.

If AB12 is used as the search string, only the item containing AB12 6CD would be displayed in the search results.

If CD is used as the search string, only the items containing AB12 6CD and AB13 7CD would be displayed in the search results.

Search strings can be defined in one or more text boxes to narrow down search results even further.

EXAMPLE: A list contains three items with the following recipient names and postcodes:

A Smith AB12 6CD
A Smith AB13 7CD
A Jones AB14 8DE

If A and AB are used as search strings, all three items would be displayed in the search results.

If Smith and AB12 are used as search strings, only the item containing A Smith and AB12 6CD would be displayed in the search results.

If Smith and AB are used as search strings, the items containing A Smith AB12 6CD and A Smith AB13 7CD would be displayed in the search results.

Search strings are not case sensitive. This means using upper and lower case characters has no effect on the search results.

EXAMPLE: If a list contained an item with a postcode of AB12 6CD, and cd was used as a search string, the item would be displayed in the search results in the same way as if CD had been specified as a search string.

Displaying Active and Inactive Items

Items in certain lists (Fig. 6) have an active and inactive property. In order to display only active items, inactive items or both, a check box (Fig. 11) is provided above the Active column of the list.

CHECK BOX STATE	DESCRIPTION
Tick (default)	Displays only active items.
Cross	Displays only inactive items.
Blank	Displays both active and inactive items.

Click the check box until the required state is achieved.

Selecting and Unselecting Items

If a list (Fig. 6) contains items that can be selected so an action can be performed on them, a check box (Fig. 11) is displayed to the left of each item. Multiple check boxes can be selected so more than one item can have an action performed on it simultaneously.

Click a check box to add or remove a tick. A tick indicates the item is selected.

To select or deselect all items currently displayed in a list, click the column title check box.

Deleting Items

Items contained in certain lists (Fig. 6) can be deleted from the list.

Select the items that require deleting then click the Delete Selected button in the side panel (Fig. 5).

If a list contains items that exceed the page limit (normally more than 20 items), a Delete All button is normally present in the side panel. Click the Delete All button to delete all items (including the items not shown).

When a delete is performed a confirmation dialog (Fig. 15) is opened prompting you to confirm the delete. Click the OK button to delete or the cancel button to cancel.

EDIT BOXES

The web interface contains edit boxes (Fig. 9) where text-based information can be specified.



Fig. 9 Edit box

Click inside an edit box then perform one of the following actions:

- If text is highlighted in the edit box: Press the Delete button to delete the text; type other text to replace the text; press the left or right arrow key to remove the highlight
- If text is not highlighted in the edit box: Press the Delete or Backspace key to delete the text; type other text; navigate the text using the left and right arrow keys

LIST BOXES

The web interface contains list boxes (Fig. 10) with selectable pre-defined options.

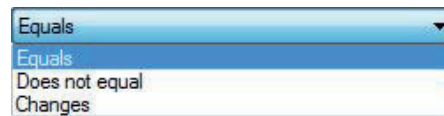


Fig. 10 List box

To use a list box, perform the following actions:

1. Click the arrow on the right-hand edge of the list box.
2. In the drop-down list that appears click an option to select it.

CHECK BOXES

The web interface contains check boxes (Fig. 11) that allow settings and options to be selected (by adding a tick) or unselected (by removing a tick).



Fig. 11 Check boxes

Click a check box to add and remove its tick.

RADIO BUTTONS

The web interface contains radio buttons (Fig. 12) that allow single choice settings and options to be selected (by adding a dot) or unselected (by removing a dot).



Fig. 12 Radio buttons

Click a radio button to add a dot.

NOTE: Adding a dot to a radio button removes the dot from another radio button in the same radio button group.

SCROLL BARS

When the information contained in a web interface page or component exceeds its boundaries, vertical and/or horizontal scroll bars (Fig. 13) appear. These provide a mechanism for moving the information up and down or left and right to reveal hidden content.



Fig. 13 Scroll bar (horizontal)

Click an arrow at the end of a scroll bar to move the content of the associated component in that direction.

MORE: For further details about using scroll bars, refer to your Windows documentation or Help.

FILE SYSTEM NAVIGATION

There are processes in the web interface such as finding a file that require your computer's file system to be navigated. Navigation is normally performed in a browse dialog (Fig. 14).

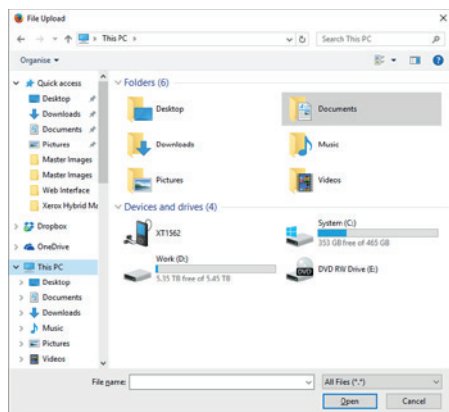


Fig. 14 Browse dialog (Windows 10)

MORE: For details about how to use the controls in the browse dialog, refer to your operating system's documentation or Help.

CONFIRMING AN ACTION

Actions that require confirmation, such as posting mail, cause a confirmation dialog (Fig. 15) to be opened.

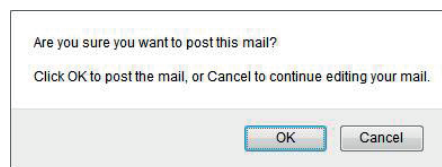


Fig. 15 Confirmation dialog

Click the OK or Yes button to confirm the action or the Cancel or No button to abandon.

NOTE: Clicking either button also closes the confirmation dialog.

NOTIFICATION

Following the completion or failure of an action such as posting mail, a notification dialog (Fig. 16) is normally opened.

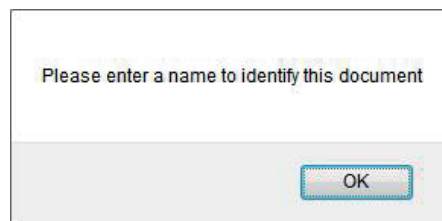


Fig. 16 Notification dialog

Click the OK button to close the notification dialog.

PDF WINDOW AND INTERFACE

Mail, templates, certain attachments and mail that is being previewed are in the PDF file format. To view them they must be displayed in a PDF interface such as Adobe Reader. The application used by Xerox Hybrid Mail Service is the default PDF viewing application on the computer where Xerox Hybrid Mail Service is being used.

To enable the current page of the web interface to remain visible, the PDF interface appears in a PDF window (Fig. 17).

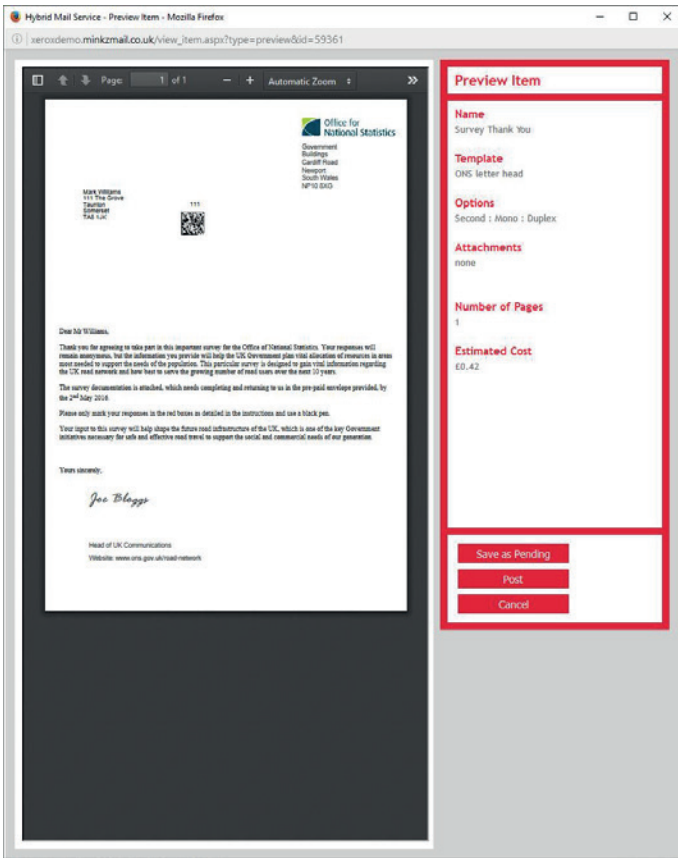


Fig. 17 PDF window and PDF interface (Adobe Reader)

If the PDF is a mail piece, a side panel appears in the PDF window and displays the following information:

- Name
- Template
- Options
- Attachments
- Number of Pages
- Created By / On
- Printed Date
- Returned Because / On (if Returned mail)

In addition, buttons also appear in the side panel so actions such as posting the mail piece can be performed.

Controls for performing actions such as page navigation and magnification appear in the PDF interface.

NOTE: Before a PDF can appear in the PDF window, the computer where Xerox Hybrid Mail Service is being used must have a PDF viewing application installed and the browser where the web interface appears must be configured to display PDF files. For details about how to do this, consult your Xerox Hybrid Mail Service administrator.

TIME LEFT

If configured, a Time Left countdown appears on each page of the web interface. This indicates the time left in hours, minutes and seconds (hh:mm:ss) to post mail to the Xerox Hybrid Mail Service server so it can be printed and prepared for delivery the same day or next working day.

Mail posted after the countdown expires will not normally be printed and prepared for delivery until the following (working) day.

The countdown begins at 12:00 am and the expiry time is specified by a Xerox Hybrid Mail Service administrator.

MORE: For further details about specifying a last posting time, refer to System Administrator Tasks > System Options > Specifying Last Posting Time.

Viewing and Modifying Your User Details

A Xerox Hybrid Mail Service user account contains information relating to a user such as their name and email address, and the user name and password required to login to Xerox Hybrid Mail Service. For convenience this information can be viewed and modified by the associated user.*

Click the User Details button (Fig. 18) to open the User Details page (Fig. 19).



Fig. 18 User Details button

Fig. 19 User Details page

Make the required changes to the settings provided then click the Save button in the side panel (Fig. 5) to apply them. If the required settings are not completed or are completed incorrectly, a notification dialog (Fig. 16) is opened.

Click the Cancel button to cancel any changes made prior to saving the user details and return to the Home page (Fig. 3).

MORE: For details about each setting, refer to Administrator Tasks > Administering Users > Settings.

***NOTE:** If the Xerox Hybrid Mail Service LDAP feature is enabled user details cannot be modified. A message notifying you of this is displayed and the Save button is disabled.

MORE: For details about using user details in a letter, refer to Common Letter Operations > Working with Placeholders.

Refreshing Page Information

Certain web interface pages need to be refreshed (reloaded) so the most recent information is displayed.

When you visit a web interface page, the information it contains is up-to-date to the point when the page was displayed. If you remain on this page for any length of time, certain information may become out of date.

Select your Internet browser's Refresh option to refresh the page information.

CAUTION: If you refresh the Compose Mail page (Fig. 51) and have not saved the associated mail, all additions and changes are lost and the page is redisplayed in its default state.

NOTE: If, after refreshing a page, you are returned to the Login page (Fig. 2), it is because the login period expired.

Uploading Files

Before signatures, images, backgrounds and attachments can be used in the web interface they must be uploaded to the Xerox Hybrid Mail Service server.

When a file requires uploading, an edit box (Fig. 9) and a Browse button appear on the associated web interface page or in the upload dialog (Fig. 20) that is opened when an Upload button is clicked.

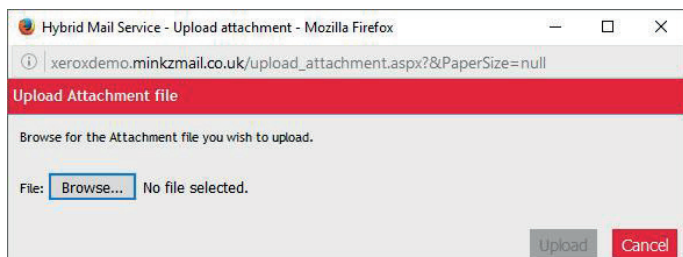


Fig. 20 Upload dialog (Add PDF attachment)

Click the Browse button to open a browse dialog (Fig. 14). After locating, selecting then “opening” the file using the browse dialog, its name appears in the edit box of the web interface page or upload dialog.

When a web interface page is saved, or after clicking the Upload button in the upload dialog, the file specified in the edit box is uploaded.

CAUTION: Depending on the size of a file and your Internet connection speed, uploading can take anywhere between a few seconds to several minutes to complete. It is therefore important you let the upload process complete by remaining on the current page or leaving the upload dialog open.

Downloading Assets

Xerox Hybrid Mail Service documentation, help and installation files can be conveniently accessed using the web interface.

Click the Downloads button (Fig. 21) in the web interface to open the Downloads page (Fig. 22).



Fig. 21 Downloads button



Fig. 22 Downloads page

Click a link to download or view the associated asset.

Click the Home page link to close the page and return to the Home page.

Viewing Version and Developer Information

To view the web interface version together with information about the developer, click the About button (Fig. 23).



Fig. 23 About button

Following this, the About dialog (Fig. 24) is opened.



Fig. 24 About dialog

Click the Close link to close the About dialog.

Logging Out

When you have finished using the web interface it is important to logout. This prevents others from using your account to compose and post mail.

Click the Logout button (Fig. 25) to immediately logout and return to the Login page (Fig. 2).



Fig. 25 Logout button

If there is Pending mail in your account, a confirmation dialog (Fig. 15) is opened asking if you wish to post it now.

NOTE: If there is no activity in the web interface for 60 minutes (or another configured time period), you are automatically logged out.

MORE: For further details about the login period, refer to Getting Started > Logging In > Login Period.

Getting Help

If you experience a problem while using the web interface, the following resources are available to help you resolve it:

- Help and user guide
- Knowledge base
- Administrator
- Support ticket

HELP AND USER GUIDE

The Help and user guide are the first resources you should use if you experience a problem with the web interface.

To view the Help, click the Help button (Fig. 26).



Fig. 26 Help button

The user guide is available as a PDF file and replicates the content of the Help but in a printable format. It can be downloaded from the Downloads page (Fig. 22) or the following web page:

http://funasset.com/support/downloads_guides.asp

KNOWLEDGE BASE

Prior to requesting help from a Xerox Hybrid Mail Service administrator or requesting support it is advised you browse the Knowledge Base on the Funasset website for a solution to your problem.

The Knowledge Base appears on the following web page:

http://funasset.com/support/knowledge_base.asp

ADMINISTRATOR

If resolution to a web interface problem cannot be found in the Help, user guide or knowledge base, it is advised you contact your Xerox Hybrid Mail Service administrator.

SUPPORT TICKET

If you are a Xerox Hybrid Mail Service administrator the Funasset support ticket system is the preferred method for requesting support.

Use the following URL in an Internet browser to access the support ticket system:

http://funasset.com/user_account/support_tickets.asp

NOTE: A Funasset user account is required to access the support ticket system.

NOTE: The support ticket system is for use by Xerox Hybrid Mail Service administrators only. Support tickets submitted by other Xerox Hybrid Mail Service users will be ignored.

Common Mail Operations

In this section the following information is included:

- Manipulating Text
 - Inserting a Signature Image
 - Inserting an Image
 - Inserting a Page Break
 - Viewing and Modifying HTML Code
 - Pasting Text from an External Source
 - Reverting
 - Spellchecking
 - Working with Placeholders
-

Manipulating Text

Text contained in the mail body on the Compose Mail page (Fig. 51) and the Add Template page (Fig. 86) can be manipulated to match your requirements. This is achieved using tools found on the Word Processing toolbar (Fig. 27) which dynamically appears after clicking inside the mail body.

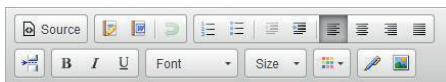


Fig. 27 Word Processing toolbar

CHANGING THE FONT

To change the font of text in the mail body, highlight the text then select an option from the Font list box (Fig. 28) located on the Word Processing toolbar (Fig. 27).

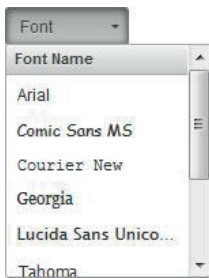


Fig. 28 Font list box

NOTE: If no text is highlighted and the font is changed, all text typed on the current line and all new lines in the mail body appear in that font.

CHANGING THE SIZE

To change the size of text in the mail body, highlight the text then select an option from the Font Size list box (Fig. 29) located on the Word Processing toolbar (Fig. 27).

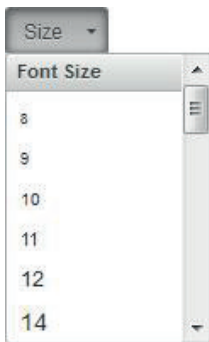


Fig. 29 Font Size list box

NOTE: If no text is highlighted and the size is changed, all text typed on the current line and all new lines in the mail body appears in that size.

CHANGING THE STYLE

To change the style of text in the mail body, highlight the text then click the required style button (Fig. 30) located on the Word Processing toolbar (Fig. 27).



Fig. 30 Bold, Italic and Underline buttons

EXAMPLE: **Bold text** *Italic text* Underlined text

NOTE: Text can be made bold, italic and underlined or any combination of the three by clicking each of the required buttons in turn while the text is highlighted.

To remove the bold, italic or underlined style from text, highlight it then click the button associated with the style the text already has.

EXAMPLE: If text is bold, click the Bold button to remove the bold style.

NOTE: If no text is highlighted and the style is changed, all text typed on the current line and all new lines in the mail body appears in that style.

CHANGING THE ALIGNMENT

To change the alignment of text in the letter body or header, highlight the text or place the cursor anywhere in the text then click the required alignment button (Fig. 31) located on the Word Processing toolbar (Fig. 27).



Fig. 31 Left, Centre, Right and Justified alignment buttons

NOTE: A change to the alignment of text affects the entire paragraph (irrespective of whether only part of it is highlighted) until a line break is reached.

NOTE: If no text is highlighted and the alignment is changed, all text typed on the current line and all new lines in the mail body appears in that alignment.

ADDING A BULLET LIST

To add a bullet (unordered) list to text in the letter body or header, highlight the text then click the Bullet List button (Fig. 32) located on the Word Processing toolbar (Fig. 27).



Fig. 32 Bullet List button

EXAMPLE: • Bullet list text

- Bullet list text
- Bullet list text

ADDING A NUMBER LIST

To add a number (ordered) list to text in the mail body, highlight the text then click the Number List button (Fig. 33) located on the Word Processing toolbar (Fig. 27).



Fig. 33 Number List button

EXAMPLE: 1. Number list text
2. Number list text
3. Number list text

CHANGING THE COLOUR

To change the colour of text in the mail body, highlight the text then click the Text Colour button (Fig. 34) located on the Word Processing toolbar (Fig. 27).



Fig. 34 Text Colour button

Click a colour on the colour palette (Fig. 35) to immediately apply it to the highlighted text, or click the More Colours button to open the Select Colour dialog (Fig. 36).

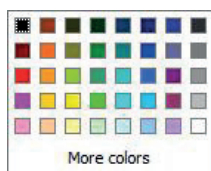


Fig. 35 Colour palette

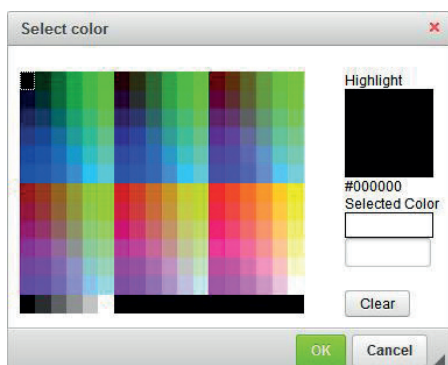


Fig. 36 Select Colour dialog

Click a colour in the Select Colour dialog then click the OK button to close the dialog and apply the colour to the highlighted text.

NOTE: You may not see a colour change until you deselect the highlighted text.

NOTE: If no text is highlighted and the colour is changed, all text typed on the current line and all new lines in the mail body appear in that colour.

ADDING AND REMOVING AN INDENT

To change the left-hand position of an entire line of text in the mail body, position the cursor on the line of text then click the Decrease Indent or Increase Indent button (Fig. 37).



Fig. 37 Decrease Indent and Increase Indent buttons

NOTE: The Decrease Indent button will be unavailable until an indent is applied to a line of text.

EXAMPLE: Text without an indent
Text with an indent

Inserting a Signature Image

To add the signature image defined in your user details to the mail body, position the cursor where you would like it to appear then click the Insert Signature button (Fig. 38) located on the Word Processing toolbar (Fig. 27).



Fig. 38 Insert Signature button

MORE: For details about applying a signature image to your user details, refer to Getting Started > Viewing and Modifying Your User Details.

MORE: For details about inserting your signature image using a placeholder, refer to Common Letter Operations > Working with Placeholders > Adding User Details.

MORE: For details about inserting a signature image that is not defined in your user details, refer to Common Letter Operations > Inserting an Image.

Inserting an Image

To add an image to the mail body, position the cursor where you would like it to appear then click the Insert Image button (Fig. 39) located on the Word Processing toolbar (Fig. 27).



Fig. 39 Insert Image button

MORE: For further details about the process of inserting an image, refer to Getting Started > Uploading Files.

SUPPORTED FORMATS

The following image formats are supported:

- BMP
- GIF
- JPG/JPEG
- PNG

Inserting a Page Break

A page break forces a new page in a letter.

To insert a page break in the mail body, position the cursor where you would like it to appear then click the Page Break button (Fig. 40) located on the Word Processing toolbar (Fig. 27).



Fig. 40 Page Break button

A Page Break Marker (Fig. 41) now appears in the mail body.

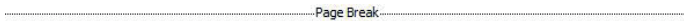


Fig. 41 Page Break Marker

REMOVING

A page break can be removed from the mail body by deleting the Page Break Marker (Fig. 41) in the same way as you delete text or an image.

Viewing and Modifying HTML Code

HTML code is used to determine how text appears and is positioned in the mail body and subsequently the PDF of the letter Xerox Hybrid Mail Service creates.

To produce bespoke text and achieve bespoke positioning that would be unobtainable using the word processing tools provided, you can view and modify the associated HTML code yourself.

Click the Source button (Fig. 42) located on the Word Processing toolbar (Fig. 27) to open the Source dialog (Fig. 43). Here HTML code associated with the content of the mail body can be viewed and modified.



Fig. 42 Source button

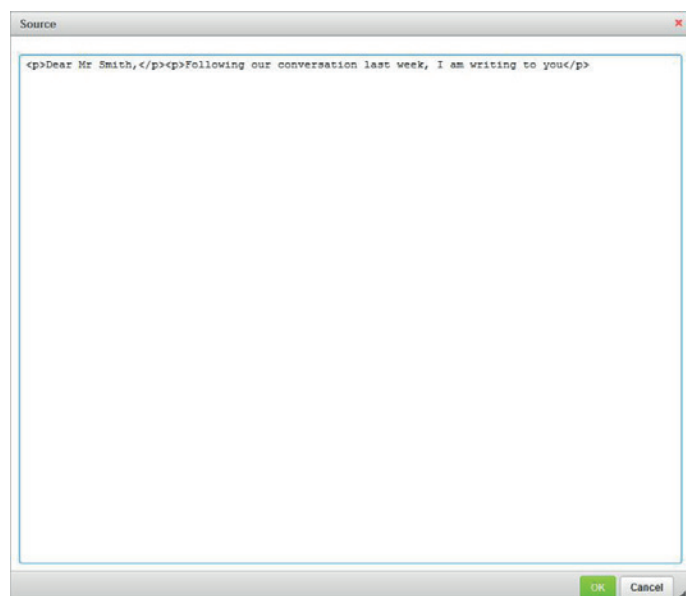


Fig. 43 Source dialog

When the required changes to the HTML code have been made, click the OK button to apply the changes to the mail body and close the Source dialog.

Click the Cancel button to close the Source dialog without applying changes made to the HTML code.

CAUTION: Modifying HTML code should only be performed by experienced users. Implementing invalid code can result in display, processing and printing problems.

NOTE: HTML tables are not supported. If HTML table code is detected, a notification dialog (Fig. 16) is opened prior to posting or saving as Pending mail.

Pasting Text from an External Source

To circumvent browser security settings and to prevent text copied from external documents such as Word conflicting with Xerox Hybrid Mail Service, the following paste options are provided:

- Paste as plain text
- Paste from Word

To paste text in the mail body, perform the following actions:

1. Copy the text in the source document to the Windows Clipboard.
2. Position the cursor in the mail body where you would like it to appear.
3. Click either the Paste as Plain text button (Fig. 44) or the Paste from Word button (Fig. 45) located on the Word Processing toolbar (Fig. 27).
4. In the Paste dialog (Fig. 46) click inside the edit box (Fig. 9).
5. Press CTRL V or CMD V to paste the copied text in the edit box.
6. Click the OK button to close the Paste dialog and paste the text in the mail body.



Fig. 44 Paste as Plain text button



Fig. 45 Paste from Word button

NOTE: The buttons only become available when text has been copied to the Windows clipboard.

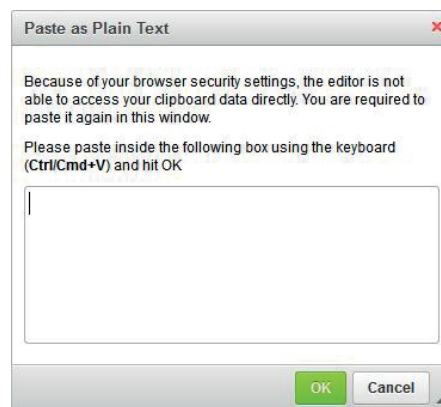


Fig. 46 Paste dialog (Plain Text)

Reverting an Action

To revert an action performed in the mail body such as changing the font size of text, click the Undo button (Fig. 47) on the Word Processing toolbar (Fig. 27).



Fig. 47 Undo button

Each click reverts the action previously performed.

Spellchecking

Text in the Recipient Name, Address and Postcode fields, and the mail body can be checked for spelling mistakes.

Click the Spell Check button (Fig. 48) located on the Word Processing toolbar (Fig. 27) to open the Spelling dialog (Fig. 49) where spelling mistakes are displayed and can be corrected and ignored.



Fig. 48 Spellcheck button

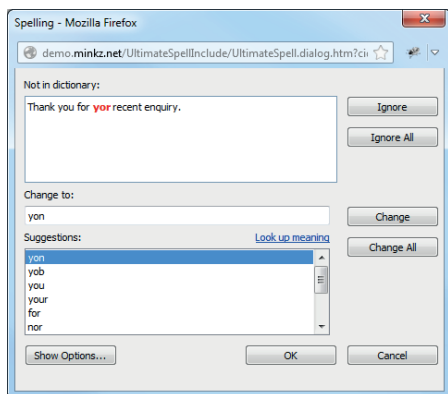


Fig. 49 Spelling dialog

Each spelling mistake is displayed singularly in red in the Not in dictionary field. The default correction for a mistake is shown in the Change to field, and a list of further possible corrections appear in the Suggestions field.

NOTE: The Recipient Name, Address and Postcode fields are checked first followed by the mail body.

When spellchecking is complete, or if you simply want to close the Spelling dialog, click either the OK or Cancel button.

CORRECTING MISTAKES

A spelling mistake in the Recipient Name, Address and Postcode fields, or mail body can be corrected using the word displayed in the Change to field of the Spelling dialog (Fig. 49). If the default word is unsuitable, click an alternative in the Suggestions field or type your own.

Click the Change button to correct a mistake and display the next mistake (if there is one) in the Not in dictionary field.

If you think a mistake appears multiple times, click the Change All button to correct them all simultaneously.

When all mistakes have been corrected, a spell check complete message is displayed near the top of the Spelling dialog.

IGNORING MISTAKES

On occasion you may consider a word highlighted as a mistake in the Spelling dialog (Fig. 49) to be correct. This is because it does not appear in the spellchecker dictionary.

EXAMPLE: Names of people, products and addresses are unlikely to appear in the dictionary and are therefore considered and highlighted as mistakes.

When this occurs, click the Ignore button to prevent the word from being corrected and display the next mistake (if there is one).

If you think a word highlighted as a mistake appears multiple times, click the Ignore All button to ignore them all simultaneously.

OPTIONS

To further enhance the spellchecking capability of the web interface, the following options are available in the Spelling dialog (Fig. 49):

- Ignore words in uppercase
- Ignore words in mixed case
- Ignore words with numbers
- Ignore repeated words
- Ignore Internet addresses
- Ignore email addresses
- Ignore filenames
- Ignore HTML file tags

To show or hide these options click the Options button.

Click a check box next to an option to determine whether the option is on (ticked) or off (blank).

Working with Placeholders

Mail can contain special text strings called placeholders. These allow data obtained from various sources to appear in their place.

EXAMPLE: You could add a placeholder to automatically display the current date, your signature from your user details, or information such as a customer number from a CSV file.

There are several types of placeholder, each of which help you generate mail more quickly and easily:

- Date
- User details
- Variable data

All placeholders are identified by an @ symbol at either end of the placeholder name.

EXAMPLE: @USER.FIRSTNAME@
@InvoiceTotal@
@Nationality@

Any characters except space, @ and . (unless it is a user details placeholder) can be used as a placeholder name.

ADDING A DATE

It is common for a date to appear on mail to indicate when it was written and sent. To automate this process and ensure the current date is displayed, a date placeholder can be used.

To apply the current date to mail, position the cursor in the mail body where you would like it to appear then type the following placeholder:

@DATE@

If the current date is 01 January 2014, the same date in the following format is displayed:

1st January 2014

If you prefer not to use the current date placeholder, any date, in any format can be manually typed in the mail body.

ADDING USER DETAILS

It is common for the name, signature and contact details of the person posting a mail piece to appear at the end of its content. To automate adding these details, certain content in your Xerox Hybrid Mail Service user details can be used by specifying placeholders.

To add your user details to a mail piece, position the cursor in the mail body where you would like one or more to appear then type any of the following placeholders in any combination:

@USER.SIGNATURE@ Signature image
@USER.FIRSTNAME@ First name
@USER.LASTNAME@ Last name
@USER.JOBTITLE@ Job title
@USER.TELEPHONE@ Telephone
@USER.MOBILE@ Mobile

EXAMPLE: The following placeholders produce the following result:

@USER.SIGNATURE@
@USER.FIRSTNAME@ @USER.LASTNAME@
@USER.JOBTITLE@
@USER.TELEPHONE@ / @USER.MOBILE@



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NOTE: After adding the @USER.SIGNATURE@ placeholder, the actual signature image is not displayed until you leave the Compose Mail page (Fig. 51) and return to it.

CAUTION: If you leave (or refresh) the Compose Mail page, all letter body and header content (including placeholders) is lost unless the mail was previously saved.

MORE: For details about changing the content of your user details placeholders, refer to Getting Started > Viewing and Modifying Your User Details.

ADDING VARIABLE DATA

Variable data can be included anywhere in a mail piece by specifying placeholders.

EXAMPLE: If a mail piece required a customer reference, a placeholder could be positioned where it needed to appear.

@CustomerReference@

To add variable data to a mail piece, position the cursor in the mail body where you would like it to appear then type the name of the placeholder.

The content of the placeholder is then determined manually by you, or automatically by extracting it from a CSV file.

Manually Specifying Variable Data

For mail transmitted to a single recipient (i.e. a CSV file is not used), the content of variable data placeholders is specified in the Variable Fields popup (Fig. 50) that is opened when you preview and post mail.

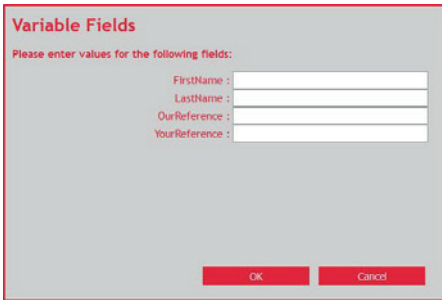
The image shows a 'Variable Fields' dialog box with a grey background and a red border. At the top left, the title 'Variable Fields' is in red. Below it, the text 'Please enter values for the following fields:' is in red. There are three input fields, each with a red label to its left: 'FirstName :', 'LastName :', and 'YourReference :'. Each label is followed by a white rectangular input box. At the bottom of the dialog, there are two red buttons: 'OK' and 'Cancel'.

Fig. 50 Variable Fields pop-up

The Variable Fields pop-up displays a list of all the variable data placeholder names and associated edit boxes (Fig. 9) alongside. Click inside an edit box then type the information you would like to appear where the corresponding placeholder is positioned in the mail piece. Repeat this process for all edit boxes.

When complete, click the OK button to close the Variable Fields pop-up and post, preview or save the mail piece.

Extracting Variable Data from a CSV File

If a CSV file has been used to determine the recipients of mail, the content of variable data placeholders is determined by data contained in corresponding columns/fields of the same CSV file.

MORE: For details about using CSV files, refer to Appendix A – CSV File.

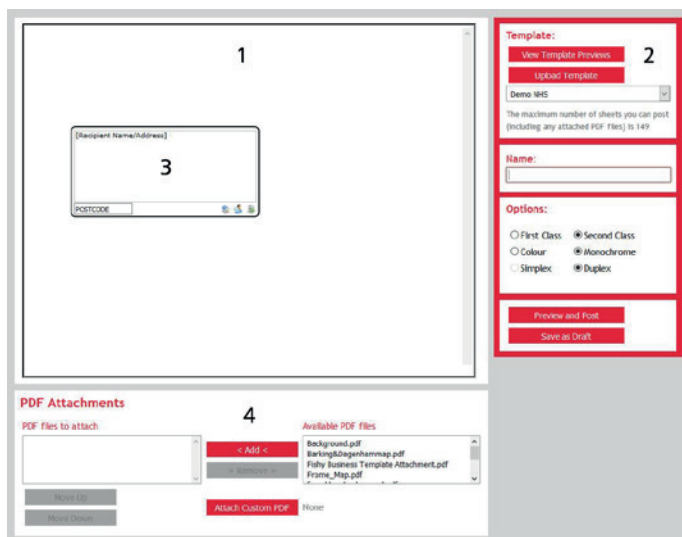
Composing and Posting Mail

In this section the following information is included:

- The Compose Mail Page
 - The Compose Mail Process
 - Applying a Template
 - Specifying a Name
 - Specifying Recipient Details
 - Validating Addresses
 - Writing Content
 - Appending Attachments
 - Specifying Delivery and Print Settings
 - Saving as Draft Mail
 - Previewing
 - Saving as Pending Mail
 - Posting
-

The Compose Mail Page

Mail is composed on the Compose Mail page (Fig. 51) which is opened by clicking the Compose Mail option on the Mail menu (Fig. 4). Here content, recipient details, optional attachments and a post location are specified prior to saving, previewing and posting.



NO.	NAME	DESCRIPTION
1	Mail body	The area where you type mail text (just like you would when using a word-processor) and the area where pre-written text from the selected template appears. If the template is configured as read only, content in the mail body cannot be modified.
2	Side panel	Allows you to select or upload a template, specify a name for the mail piece, specify options, and provides buttons for previewing, posting and saving the mail as Draft mail.
3	Recipient Name/ Address and Postcode fields	Allows you to type recipient details, and provides buttons for finding an address from a postcode, using a previously posted to recipient and using a CSV file.
4	Attachments	Allows you to determine what attachments are appended to the mail piece.

Fig. 51 Compose Mail page

The Compose Mail Process

To compose mail using the web interface, the following actions need to be performed:

1. Open the Compose Mail page (Fig. 51)
2. Select a template or use the default template
3. Specify a name for the mail piece
4. Specify recipient details
5. Write content or modify the selected template's content
6. Append optional attachments
7. Specify post options
8. Save the mail
9. Preview the mail
10. Post the mail

Applying a Template

When you initially open the Compose Mail page (Fig. 51), a default (normally blank) template is displayed. This can of course be used to compose your mail, but selecting an existing template or uploading a new one may be preferable.

SELECTING

It is likely your Xerox Hybrid Mail Service account will contain predefined templates that can be selected and used on the Compose Mail page (Fig. 51).

The following methods can be used to select a template:

- From a list box (Fig. 10)
- From a preview

From a List Box

To select a template, perform the following actions:

1. Click the template list box (Fig. 10) in the side panel (Fig. 5) on the Compose Mail page (Fig. 51).
2. Click the name of the template you want to use.

Following this, the content and settings of the template are applied to the Compose Mail page.

From a Preview

To select a template, perform the following actions:

1. Click the View Template Preview button in the side panel (Fig. 5) on the Compose Mail page (Fig. 51) to open the Preview Template pop-up (Fig. 10).
2. Click the left or right buttons to locate the required template.
3. Click the template.

Following this, the content and settings of the template are applied to the Compose Mail page.

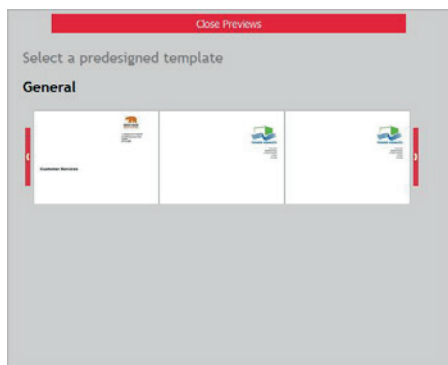


Fig. 52 Preview Template pop-up

UPLOADING

If none of the predefined templates are suitable you can upload and apply a PDF template by performing the following actions:

1. Click the Upload Template button in the side panel (Fig. 5) on the Compose Mail page (Fig. 51) to open an upload dialog (Fig. 20).
2. Click the Browse button to open a browse dialog (Fig. 14).
3. Locate then select the required PDF file.
4. Click the Open button to close the browse dialog and return to the upload dialog.
5. Click the Upload button to upload the PDF, close the upload dialog and apply the template to the Compose Mail page.

To remove the template, click the Reset Template button in the side panel.

Specifying a Name

To identify mail in Xerox Hybrid Mail Service it must be given a name.

Click inside the Name edit box (Fig. 9) in the side panel (Fig. 5) on the Compose Mail page (Fig. 51) then type a suitable name.

Names can contain alphanumeric characters, spaces and punctuation, but must not exceed 30 characters in length. Spaces without any other characters are not allowed.

NOTE: A name must be specified before saving, previewing and posting mail.

Specifying Recipient Details

Before you can preview or post mail, or save Pending mail, you must specify who and where it will be sent to. This is achieved in one of the following ways:

- Typing
- Finding an address from a postcode
- Using a previously posted to recipient
- Using a CSV file

MORE: For details about the checks made to recipient details, refer to Getting Started > Mail Considerations > Checks. Performs

TYPING

Click anywhere in the Recipient Name/Address and Postcode fields on the Compose Mail page (Fig. 51) then type the required recipient details.

FINDING AN ADDRESS FROM A POSTCODE

If the Postcoder add-on is installed for your organisation’s Xerox Hybrid Mail Service account, Xerox Hybrid Mail Service contains a database of all UK addresses. This means if you know the postcode of a recipient, you can quickly find their full address and apply it to a letter.

Type a postcode in the Postcode field on the Compose Mail page (Fig. 51) then click the Find Address button (Fig. 53) to open the Select Address pop-up (Fig. 54).



Fig. 53 Find Address button



Fig. 54 Select Address pop-up

The Select Address pop-up contains a list (Fig. 6) of all the addresses that match the specified postcode. Click the Select link to the left of the address you require to close the pop-up and apply the address to the Recipient Name/Address field on the Compose Mail page.

NOTE: If the Postcoder add-on is not installed for your organisation’s Xerox Hybrid Mail Service account, the Find Address button is not present and the Select Address pop-up is inaccessible.

USING A PREVIOUSLY POSTED TO RECIPIENT

Each time mail is posted, the associated recipient details are stored in the Xerox Hybrid Mail Service database so they can be quickly and conveniently applied to future letters.

NOTE: Only you and Xerox Hybrid Mail Service administrators have access to recipient details associated with mail you have posted.

Click the Find Recipient button (Fig. 55) on the Compose Mail page (Fig. 51) to open the Find Recipient pop-up (Fig. 56) where recipients are listed.



Fig. 55 Find Recipient button

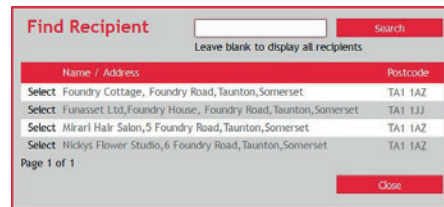


Fig. 56 Find Recipient pop-up

MORE: For details about navigating and sorting lists, refer to Getting Started > Workspace Overview > Lists.

NOTE: By default, the list of recipients is displayed in name/address ascending order (A to Z).

Searching

To help you quickly locate the required recipient in the Find Recipient popup (Fig. 56), a search facility is provided. Click inside the Search field, type the recipient’s name or any part of their address or postcode then press the Search button. If any matches are found they are displayed in the list below.

MORE: For further details about searching lists, refer to Getting Started > Web Workspace Overview > Lists > Searching.

Selecting

When you have located the required recipient in the Find Recipient pop-up (Fig. 56), click the Select link to the left of their name and address details. Following this, the Find Recipient pop-up is closed and the Recipient Name/Address and Postcode fields on the Compose Mail page (Fig. 51) are populated with the selected recipient details.

USING A CSV FILE

If you need to send mail to multiple recipients simultaneously, you can use a comma separated value (CSV) file containing the name, address and postcode of the intended recipients.

NOTE: Only files with a CSV extension can be used.

Click the Add CSV button (Fig. 57) on the Compose Mail page (Fig. 51) to open the Add CSV pop-up where the required CSV file can be specified.



Fig. 57 Add CSV button

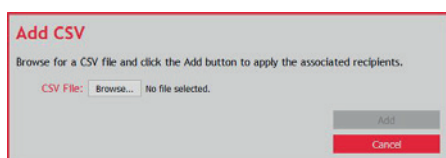


Fig. 58 Add CSV pop-up

MORE: For details about selecting and uploading a CSV file, refer to Getting Started > Uploading Files.

Click the Add button to close the Add CSV pop-up and add the selected CSV file to the mail. <CSV File> appears in the Recipient Name/Address and Postcode fields on the Compose Mail page to indicate a CSV file is being used.

NOTE: Information contained in a CSV file can also be used to populate variable data placeholders in a letter.

NOTE: Prior to previewing or posting mail, or saving Pending mail, postcodes in a CSV file are checked for accuracy. Despite this, it is advised you use the address validation facility.

MORE: For details about the requirements and structure of a CSV file, refer to Appendix A – CSV File.

Validating Addresses

Prior to using a CSV file it is advised the addresses it contains are checked for accuracy. A facility for doing this is provided in the web interface.

To validate addresses contained in a CSV file and receive good or bad CSV files, or both, click the Validate Addresses option on the Mail menu (Fig. 4). Following this, the Validate Addresses page (Fig. 59) is opened.

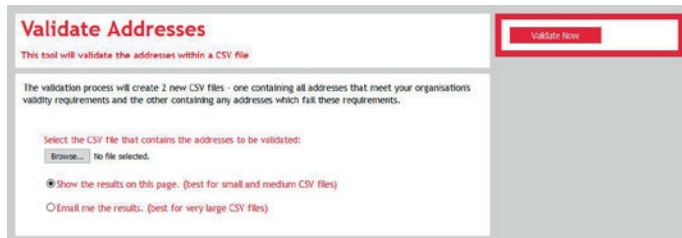


Fig. 59 Validate Addresses page

Perform the following actions:

1. Click the Browse button to open a browse dialog (Fig. 14).
2. Locate then select the required CSV file.
3. Click the Open button in the browse dialog to close the dialog and apply the name of the selected CSV file to the text box on the Validate Addresses page.
4. Click either the Show the results on this page radio button (Fig. 12) or the Email me the results* radio button.
5. Click the Validate Now button in the side panel (Fig. 5) to begin the checking process.

Writing Content

The mail body on the Compose Mail page (Fig. 51) is where you write the content of mail (normally a letter or a postcard).

Position the cursor in the mail body to write, modify and manipulate text, add images, a signature and placeholders, and apply page breaks.

NOTE: The mail content cannot be modified if the template is configured for read-only.

MORE: For details about manipulating text, and inserting signatures, images, page breaks and placeholders, refer to Common Mail Operations.

When checking is complete and if the Show results on this page radio button was selected, Validated Addresses and Bad Addresses buttons (Fig. 60) appear below the submit button.



Fig. 60 Validated Addresses and Bad Addresses buttons

Click a button to open your browser's open/save file dialog or mechanism then save the CSV file.

NOTE: If there are no validated addresses, the Validated Addresses button is inaccessible. Similarly, if there are no bad addresses the Bad Addresses button is inaccessible.

Validated and bad CSV files contain a header row, together with address details and other information as per the original CSV file. The validated CSV file can be used with Xerox Hybrid Mail Service while the bad CSV file should have its addresses corrected (together with the database the recipient details were obtained from) prior to checking it again.

***NOTE:** When emailing CSV result files, the email address they are sent to is the one specified in your user details.

Appending Attachments

PDF file attachments such as leaflets, maps, price lists and invoices can be appended to a mail piece.

You can append a custom attachment or one or more predetermined attachments, or both.

USING A CUSTOM ATTACHMENT

A custom PDF attachment can be appended to a mail piece.

Click the Attach Custom PDF button in the PDF Attachments panel on the Compose Mail page (Fig. 51) to open an upload dialog (Fig. 20). Here the attachment you wish to append can be specified then uploaded.

MORE: For details about uploading an attachment, refer to Getting Started > Uploading Files.

After uploading an attachment and closing the upload dialog, the Attach Custom PDF button changes to a Remove PDF button and the name of the PDF appears next to it.

MORE: For details about the page size requirement of an attachment, and the areas on a page that must be avoided in an attachment, refer to Getting started > Mail Considerations.

Removing

To remove a custom attachment, click the Remove PDF button in the PDF Attachments panel on the Compose Mail page (Fig. 51).

USING PREDEFINED ATTACHMENTS

Predefined PDF file attachments available to your user account appear in either the PDF files to attach or Available PDF files boxes in the PDF Attachments panel on the Compose Mail page (Fig. 51).

The PDF files to attach box determines the attachments that will be attached to a mail piece, and the Available PDF files box determines the attachments that are available to attach.

NOTE: If a template has one or more attachments already defined in the PDF files to attach box, it is likely the attachment(s) are required for the associated mail piece and it is advised they are not removed.

Adding

To add an attachment, perform the following actions in the PDF Attachments panel on the Compose Mail page (Fig. 51):

1. Click the name of an attachment in the Available PDF files box.
2. Click the Add button to move it to the PDF files to attach box.

Removing

To remove an attachment, perform the following actions in the PDF Attachments panel on the Compose Mail page (Fig. 51):

1. Click the name of an attachment in the PDF files to append box.
2. Click the Remove button to move it to the Available PDF files box.

Changing the Order

To change the order of attachments, perform the following actions in the PDF Attachments panel on the Compose Mail page (Fig. 51):

1. Click the name of an attachment in the PDF files to attach box.
2. Click the Move up button to move the attachment up the list, or the Move Down button to move the attachment down the list.

Repeat this process until the attachments are in the required order.

ORDER OF ATTACHMENTS

If you have selected your own attachment it is always appended immediately after the letter or postcard of the mail piece you are composing. Following this, any predetermined attachments are appended in the order they appear in the PDF files to attach box in the PDF Attachments panel on the Compose Mail page (Fig. 51).

EXAMPLE: If Attachment A is your own attachment, and Attachment B and Attachment C are listed in the PDF files to attach box, the mail piece is presented in the following way:

Letter/Postcard
Attachment A
Attachment B
Attachment C

VIEWING

Attachments and the associated letter or postcard are viewed by previewing the mail.

MORE: For details about Previewing mail, refer to Composing and Posting Mail > Previewing.

Specifying Delivery and Print Settings

Prior to posting mail, delivery and print settings must be specified or the defaults used.

The following delivery and print settings are provided in the side panel (Fig. 5) on the Compose Mail page (Fig. 51):

SETTING	DESCRIPTION
First Class / Second Class	Determines whether mail is delivered using a Royal Mail First Class (next day) or Second Class (2 day) delivery service.
Colour / Monochrome	Determines whether the mail is printed in full colour or monochrome.
Simplex / Duplex	Determines whether mail is printed on one side of a sheet of paper (simplex) or on both sides of a sheet of paper (duplex).

To select an option, click the associated radio button (Fig. 12).

Saving as Draft Mail

There may be occasions when you are unable to complete the composition of mail prior to posting it, or you may periodically want to save your progress as a precaution in case your computer crashes, you lose your Internet or network connection, or your login period expires. For these reasons, mail can be saved as Draft mail, viewed again, and if necessary modified at any time.

Click the Save as Draft button in the side panel (Fig. 5) on the Compose Mail page (Fig. 51) to save the mail.

When mail is successfully saved, a notification dialog (Fig. 16) is opened to notify you of this. Click the OK button to close the dialog and return to the Compose Mail page where your mail remains. You can now safely leave the page, refresh it, logout or even close your browser and still view the mail at another time in the same state as when you saved it.

MORE: For details about viewing Draft mail, refer to Managing Mail > Draft Mail.

MORE: For details about saving mail as Pending mail, refer to Composing and Posting Mail > Previewing > Saving as Pending Mail

Previewing

Despite mail looking similar on the Compose Mail page (Fig. 51) to how it is printed, a facility to preview mail is presented prior to posting.

To preview mail, click the Preview and Post button in the side panel (Fig. 5) on the Compose Mail page. Following this, the Preview Mail window is opened. The Preview Mail window is the same as the PDF window (Fig. 17) and contains a PDF interface where the mail appears.

NOTE: If variable data placeholders are included, a notification dialog (Fig. 16) is opened. Here edit boxes (Fig. 9) for each placeholder appear. Click inside each one in turn and enter the required value.

NOTE: If there is more than one mail piece (i.e. a CSV file has been used) then only the mail piece with the most address lines appears in the PDF interface.

MORE: For further details about the PDF window and PDF interface, refer to Getting Started > PDF Window and Interface.

NOTE: Prior to previewing mail, certain recipient and mail content checks must be satisfied.

CANCELLING

If you are not satisfied with the mail piece or a mail check failed, click the Cancel button in the side panel (Fig. 5) of the Preview Mail window to close it.

Saving as Pending Mail

If you do not want to immediately post mail, it can instead be saved as Pending mail and posted at another time.

To save mail as Pending mail, preview the mail then click the Save as Pending button in the side panel (Fig. 5) of the Preview window. Following this, a notification dialog (Fig. 16) is opened informing you the mail has been submitted. Click the OK button to close the dialog.

NOTE: Prior to saving mail as Pending mail, certain checks must be satisfied. If not, a notification dialog is opened that details the problem(s). Click the OK button to close the dialog and return to the Preview window. Here, in the side panel, the Save as Pending and Post buttons are disabled and you are expected to cancel the preview so the problem(s) can be rectified.

Posting

The process of posting mail involves transmitting it to the Xerox Hybrid Mail Service server. Here it is placed in the Input queue ready for further processing then printing.

To post mail, preview it then click the Post button in the side panel (Fig. 5) of the Preview window. If posting is successful, a notification dialog (Fig. 16) is opened confirming this. Click the OK button to close the dialog and return to the Compose Mail page where the default mail now appears.

NOTE: Prior to posting mail, certain checks must be satisfied. If not, a notification dialog (Fig. 16) is opened that details the problem(s). Click the OK button to close the dialog and return to the Preview window. Here, in the side panel, the Save as Pending and Post buttons are disabled and you are expected to cancel the preview so the problem(s) can be rectified.

MORE: For details about posting Pending mail, refer to Managing Mail > Pending Mail > Posting.

Managing Mail

In this section the following information is included:

- Draft Mail
 - Pending Mail
 - Queued Mail
 - Archive Mail
 - Returned Mail
 - Recent Mail
-

Draft Mail

Draft mail appears in a list (Fig. 6) on the Draft Mail page (Fig. 61) which is opened by clicking the View Draft Mail option on the Mail menu (Fig. 4).



Fig. 61 Draft Mail page

MORE: For details about saving mail as Draft mail, refer to Composing and Posting Mail > Saving as Draft Mail.

OPENING AND MODIFYING

To view and modify Draft mail, click its name in the list (Fig. 6) on the Draft Mail page (Fig. 61). Following this, the Compose Mail page (Fig. 51) is opened.

DELETING

MORE: For details about deleting Draft mail that appears on the Draft Mail page (Fig. 61), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

Pending Mail

Pending mail appears in a list (Fig. 6) on the Pending Mail page (Fig. 62) which is opened by clicking the View Pending Mail option on the Mail menu (Fig. 4).

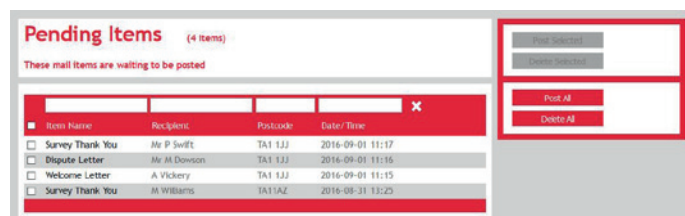


Fig. 62 Pending Mail page

MORE: For details about saving mail as Pending mail, refer to Composing and Posting Mail > Saving as Pending Mail.

POSTING

Specific or all Pending mail pieces can be posted.

Specific

To post one or more specific Pending mail pieces, perform the following actions on the Pending Mail page (Fig. 62):

1. Select each mail piece you want to post.
2. Click the Post Selected button in the side panel.

All

To post all Pending mail pieces (including those on all unseen pages of the list), click the Post All button in the side panel on the Pending Mail page (Fig. 62).

OPENING

To open a Pending mail piece, click its name in the list (Fig. 6) on the Pending Mail page (Fig. 62). Following this, the PDF window (Fig. 17) is opened where the Pending mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

DELETING

MORE: For details about deleting Pending mail that appears on the Pending Mail page (Fig. 62), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

Queued Mail

Queued mail appears in a list (Fig. 6) on the Queued Mail page (Fig. 63) which is opened by clicking the View Queued Mail option on the Mail menu (Fig. 4).

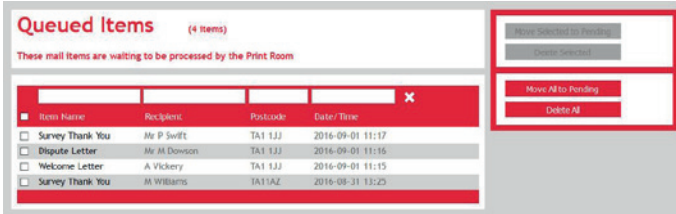


Fig. 63 Queued Mail page

CHANGING TO PENDING MAIL

Specific or all Queued mail pieces can be changed to Pending mail.

Specific

To change one or more specific Queued mail pieces to Pending mail pieces, perform the following actions on the Queued Mail page (Fig. 62):

1. Select each mail piece you want to change to Pending mail.
2. Click the Move Selected to Pending button in the side panel.

All

To change all Queued mail pieces to Pending mail pieces (including those on all unseen pages of the list), click the Move All to Pending button in the side panel on the Pending Mail page (Fig. 62).

OPENING

To open a Queued mail piece, click its name in the list (Fig. 6) on the Queued Mail page (Fig. 63). Following this, the PDF window (Fig. 17) is opened where the Queued mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

DELETING

MORE: For details about deleting Queued mail that appears on the Queued Mail page (Fig. 63), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

Archive Mail

Archive mail appears in a list (Fig. 6) on the Archive Mail page (Fig. 64) which is opened by clicking the View Archive Mail option on the Mail menu (Fig. 4).

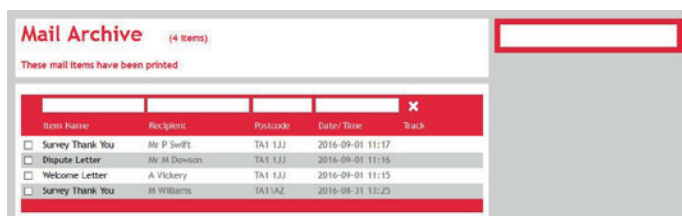


Fig. 64 Archive Mail page

MORE: For details about how Xerox Hybrid Mail Service administrators can view Archive mail associated with a particular user, refer to Administrator Tasks > Administering Users > Viewing Mail.

MORE: For details about viewing and reprinting Archive mail associated with an output queue, refer to Print Room Tasks > Managing Output Queues > Archive Mail.

OPENING

To open an Archive mail piece, click its name in the list (Fig. 6) on the Archive Mail page (Fig. 64). Following this, the PDF window (Fig. 17) is opened where the Archive mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

STORAGE PERIOD

The length of time Archive mail remains visible on the Archive Mail page (Fig. 64) is determined by the Archive Period option on the Organisation Details page (Fig. 87).

MORE: For details about viewing and modifying organisation details, refer to Administrator Tasks > Organisation Details.

TRACKING

To track an Archive mail piece, click its Track button (Fig. 65) on the Archive Mail page (Fig. 64). Following this, the Tracking Details dialog (Fig. 66) is opened.



Fig. 65 Track button

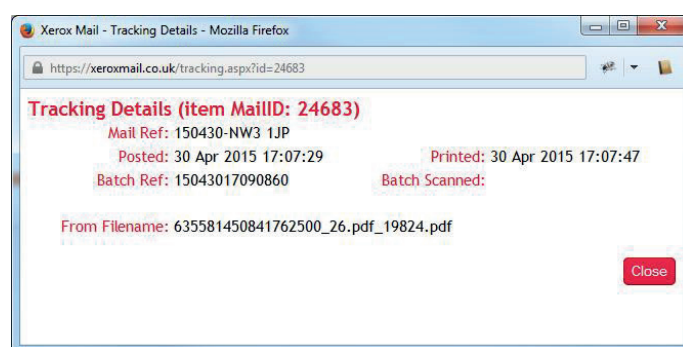


Fig. 66 Tracking Details dialog.

The following information is presented on the Tracking Details page:

ITEM	DESCRIPTION
Mail ID	The internal ID assigned to each mail piece by Xerox Hybrid Mail Service.
Mail Ref	The name given to the mail piece when it was composed.
Posted	The date and time the mail piece was posted.
Printed	The date and time the mail piece was printed, emailed or written to file.
Batch Ref	The batch reference of the batch the mail piece was assigned to (if applicable).
Batch Scanned	The date and time when the associated batch was scanned (if applicable).

Click the Close button to close the Tracking details dialog.

Returned Mail

Returned mail appears in a list (Fig. 6) on the Returned Mail page (Fig. 67) which is opened by clicking the View Returned Mail option on the Mail menu (Fig. 4).



Fig. 67 Returned Mail page

MORE: For details about how Xerox Hybrid Mail Service administrators can view and modify Returned mail associated with a particular user, refer to Administrator Tasks > Users > Viewing Mail.

OPENING

To open a Returned mail piece, click its name in the list (Fig. 6) on the Returned Mail page (Fig. 67). Following this, the PDF window (Fig. 17) is opened where the Returned mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

DELETING

MORE: For details about deleting Returned mail that appears on the Returned Mail page (Fig. 67), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

Recent Mail

When a mail piece becomes Queued mail, Pending mail or Archive mail, its name, recipient, postcode and date/time appear in a Recent Activity list (Fig. 6) on the Home page (Fig. 3).

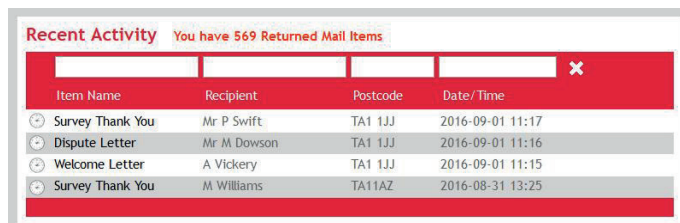


Fig. 68 Recent Activity list on the Home page

OPENING

To open a recent mail piece, click its name in the list (Fig. 6) on the Home page (Fig. 3). Following this, a PDF window (Fig. 17) is opened where the mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

Print Room Tasks

In this section the following information is included:

- Accessing
- Managing Queues
- Managing Mail Batches
- Reprinting Mail
- Scanning Returned Mail

Accessing

If you have operator, administrator or system administrator privileges, the web interface contains a Print Room menu (Fig. 4).

Click the Print Room menu to display a drop-down list containing the following options:

- Queues
- Mail Batches
- Reprint Mail
- Scan Returned Mail

Click an option to open the associated page.

Managing Queues

When mail is posted by a user using the web interface, print client or drop folder, it initially appears in the Input queue. From here it is either manually or automatically moved to a predetermined (default) output queue, manually moved to another output queue or manually returned to the sender.

The Input queue and output queues can be viewed on the Queues page (Fig. 69) which is opened by clicking the Queues option on the Print Room menu.

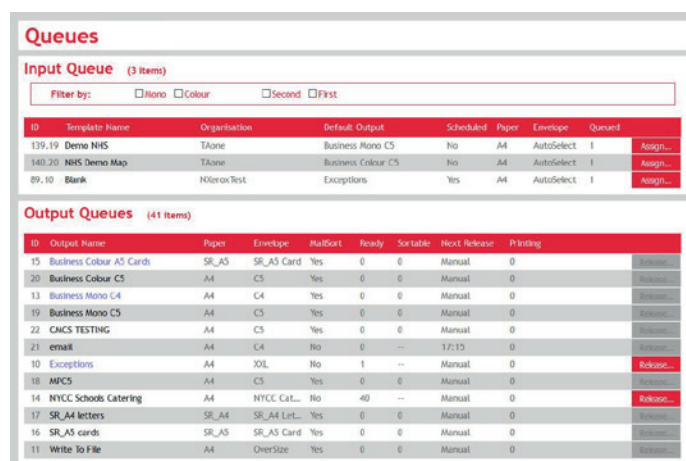


Fig. 69 Queues page

INPUT QUEUE

The Input queue is where mail is held until a further action is manually or automatically performed on it. The Input queue appears as a list (Fig. 6) on the Queues page (Fig. 69) and the mail contained within is consolidated by the template it was created from.

EXAMPLE: If a mail piece was created from Template A there would be an item in the Input queue list called Template A.

The total number of mail pieces contained in the Input queue appears next to the Input Queue title.

The following information appears in the list:

- ID
- Template Name
- Organisation
- Default Output
- Scheduled
- Paper
- Envelope
- Queued

Filtering

To reduce or increase the items in the Input queue list (Fig. 6) on the Queues page (Fig. 69), it can be filtered in the following ways:

- Mono
- Colour
- Second
- First

Select (tick) the check box (Fig. 11) of the associated filter to apply it to the Input queue list.

EXAMPLE: If the Colour check box is ticked, only templates that contain colour mail appear in the list.

A filter applied to the Input queue list determines the mail pieces that will be assigned to an output queue or returned to the user who sent them.

This means mail pieces that are omitted from the list due to a filter, are not assigned or returned.

NOTE: If none or all of the filter check boxes are ticked then all templates that have been used by mail appear in the list.

Viewing Mail

All mail created using a particular template can be viewed by clicking the name of the template in the Input queue list (Fig. 6) on the Queues page (Fig. 69). Following this, the Input Queue Detail page (Fig. 70) is opened.

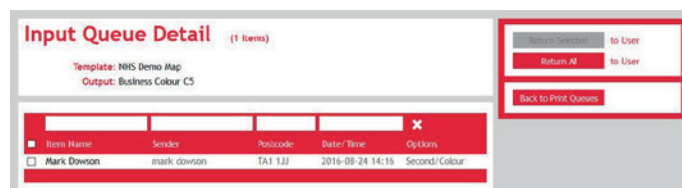


Fig. 70 Input Queue Detail page

The Input Queue Detail page displays the following information:

- The number of consolidated mail pieces
- The name of the template the mail is consolidated by
- The name of the default output queue where the mail will be assigned to

The page also contains a list (Fig. 6) where all mail pieces created using the associated template appear. The following information appears in the list:

- Item Name
- Sender
- Postcode
- Date/Time
- Options

Click the Back to Queues button in the side panel to open the Queues page (Fig. 69).

Opening

To open a mail piece that appears in the Input Queue, click its name in the list (Fig. 6) on the Input Queue Detail page (Fig. 70). Following this, the PDF window (Fig. 17) is opened where the mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

Assigning Mail to an Output Queue

Mail in the Input queue can be assigned to its predetermined (default) output queue or any other output queue.

NOTE: The default output queue for a mail piece is determined by the Output Queue setting of the template the mail piece is created from.

To assign mail pieces consolidated by a template to an output queue, perform the following actions on the Queues page (Fig. 69):

1. If necessary, filter the Input Queue list.
2. Click the Assign button to the right of the applicable item in the Input Queue list to open the Confirm Assignment pop-up (Fig. 71).
3. Click the To the Default Output radio button or click the To the Output radio button then select the required output queue from the list box (Fig. 10).
4. Click the Confirm button.

Following this, all mail pieces are immediately assigned to the selected output queue.

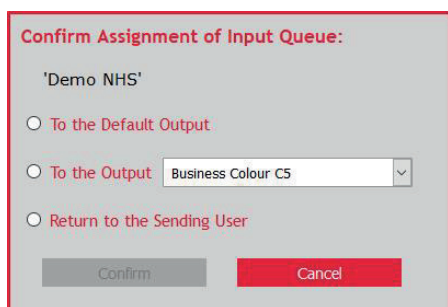


Fig. 71 Confirm Assignment pop-up

Returning Mail to the Sender

Mail in the Input queue can be returned to the sender (i.e. the user who posted it). When this occurs it becomes Returned mail and can be viewed on the user's Returned Mail page (Fig. 67).

To return all mail pieces consolidated by a template, perform the following actions on the Queues page (Fig. 69):

1. If necessary, filter the Input queue list.
2. Click the Assign button to the right of the applicable item in the Input queue list (Fig. 6) to open the Confirm Assignment pop-up (Fig. 71).
3. Click the Return to the Sending User radio button.
4. Click the Confirm button.

Alternatively, to return selected or all mail, perform the following actions:

1. Open the Input Queue Detail page (Fig. 70).
2. If necessary, search for the required mail piece(s).
3. Either select (tick) the check box of each mail piece that needs to be returned then click the Return Selected button, or click the Return All button*.
4. Click the OK button in the confirmation dialog (Fig. 15).

***CAUTION:** If the Return All button is used to return mail, mail pieces on all pages of the list are returned.

MORE: For details about viewing Returned Mail, refer to Managing Mail > Returned Mail, and Administrative Tasks > Users > Viewing Mail.

Deleting Mail

To delete a mail piece from the Input queue, perform the following actions:

1. Open the Input Queue Detail page (Fig. 70) where the mail piece that requires deleting appears.
2. If necessary, search for the required mail piece.
3. Click the name of the mail piece to open the PDF window (Fig. 17).
4. Click the Delete button in the side panel.
5. Click the OK button in the confirmation dialog (Fig. 15).

OUTPUT QUEUES

All output queues configured and enabled for Minkz Mail appear as a list (Fig. 6) on the Queues page (Fig. 69). It is here mail pieces are held prior to being released for output.

The total number of mail pieces contained in all output queues appears next to the Output Queues title.

The following information appears in the list:

- ID
- Output Name
- Paper
- Envelope
- Mailsort
- Ready
- Sortable
- Next Release
- Printing

Viewing Mail

A list of all mail in an output queue can be viewed by clicking the name of the output queue in the Output Queues list (Fig. 6) on the Queues page (Fig. 69). Following this, the Output Queue Detail page (Fig. 72) is opened.

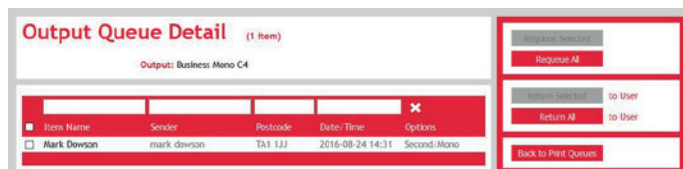


Fig. 72 Output Queue Detail page

The Output Queue Detail page displays the following information:

- The number of mail pieces in the output queue.
- The name of the output queue.

The page also contains a list (Fig. 6) where all mail pieces in the output queue appear. The following information appears in the list:

- Item Name
- Sender
- Postcode
- Date/Time
- Options

Click the Back to Queues button in the side panel to open the Queues page (Fig. 69).

Opening Mail

To open a mail piece that appears in an output queue, click its name in the list (Fig. 6) on the Output Queue Detail page (Fig. 72). Following this, the PDF window (Fig. 17) is opened where the mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

Releasing Mail

To output mail in an output queue, the output queue must be released.

To release an output queue, perform the following actions on the Queues page (Fig. 69):

1. Click the Assign button* to the right of the applicable output queue in the Output Queues list (Fig. 6) to open the Confirm Assignment pop-up (Fig. 71).
2. Click the Release the Queue radio button.
3. Click the Confirm button to close the Confirm Assignment pop-up and release the output queue.

Following this, all mail pieces are output, with the number of mail pieces remaining to be output appearing in the associated Printing column of the Output Queues list. Following output, mail becomes Archive mail.

***NOTE:** The Assign button is only enabled when there is one or more mail pieces in the associated output queue. This is indicated by the number in the associated Ready column of the Output Queues list.

Returning Mail to the Sender

Mail contained in an output queue can be returned to the sender (i.e. the user who posted it). When this occurs it becomes Returned mail and can be viewed on the user's Returned Mail page (Fig. 67).

To return selected or all mail in an output queue, perform the following actions:

1. Open the Output Queue Detail page (Fig. 72).
2. If necessary, search for the required mail piece(s).
3. Either select (tick) the check box of each mail piece that needs to be returned then click the Return Selected button, or click the Return All button*.
4. In the Confirmation dialog, click the OK button.

***CAUTION:** If the Return All button is used to return mail, mail pieces on all pages of the list are returned.

MORE: For details about viewing Returned Mail, refer to Managing Mail > Returned Mail, and Administrative Tasks > Users > Viewing Mail.

Moving Mail to the Input Queue

To move all mail in an output queue to the Input queue, perform the following actions:

1. Click the Assign button* to the right of the applicable output queue in the Output Queues list (Fig. 6) to open the Confirm Assignment pop-up (Fig. 71).
2. Click the Return to the Input Queue radio button.
3. Click the Confirm button to close the Confirm Assignment pop-up and move the mail.

Alternatively, to move selected or all mail to the Input Queue, perform the following actions:

1. Open the Output Queue Detail page (Fig. 72).
2. If necessary, search for the required mail piece(s).
3. Either select (tick) the check box of each mail piece that needs to be returned then click the Requeue Selected button, or click the Requeue All button*.
4. In the Confirmation dialog, click the OK button.

***CAUTION:** If the Requeue All button is used to return mail, mail pieces on all pages of the list are returned.

Moving Mail to Another Output Queue

To move all mail in an output queue to another output queue, perform the following actions:

1. Click the Assign button* to the right of the applicable output queue in the Output Queues list (Fig. 6) to open the Confirm Assignment pop-up (Fig. 71).
2. Click the Move Mail to radio button.
3. Select the required output queue in the output queues list box (Fig. 10).
4. Click the Confirm button to close the Confirm Assignment pop-up and move the mail.

Deleting Mail

To delete a mail piece from an output queue, perform the following actions:

1. Open the Output Queue Detail page (Fig. 72) where the mail piece that requires deleting appears.
2. If necessary, search for the required mail piece.
3. Click the name of the mail piece to open the PDF window (Fig. 17).
4. Click the Delete button in the side panel.
5. Click the OK button in the confirmation dialog (Fig. 15).

Managing Mail Batches

A mail batch is a single PDF file containing multiple mail pieces. They are created after mail is released from an output queue. Their purpose is to maximise the speed at which mail is printed, by presenting a single PDF file to a printer instead of multiple PDF files.

Mail batches appear in a list (Fig. 6) on the Mail Batches page (Fig. 73) which is opened by selecting the Mail Batches option on the Print Room menu (Fig. 4).

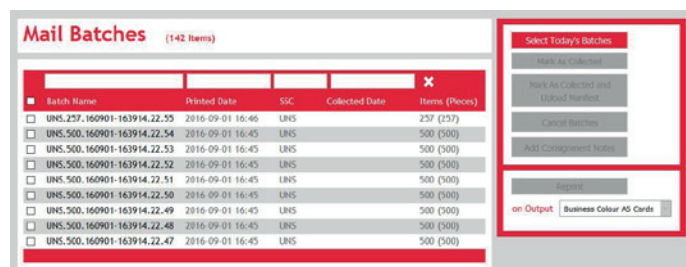


Fig. 73 Mail Batches page

The following information appears in the list:

- Batch Name
- Printed
- SSC
- Collected
- Mail Pieces

VIEWING MAIL

A list of all mail in a mail batch can be viewed by clicking the Batch Name in the list (Fig. 6) on the Mail batches page (Fig. 73). Following this, the Mail Batch Detail page (Fig. 74) is opened.

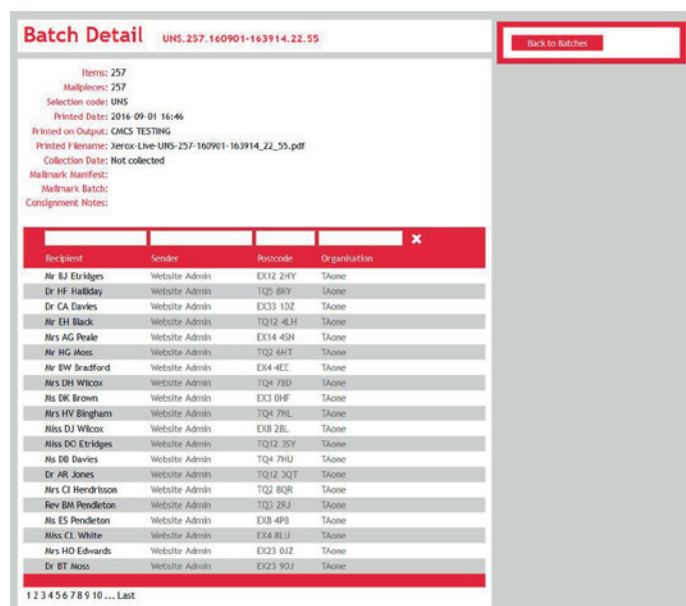


Fig. 74 Mail Batch Detail page

The Mail Batch Detail page displays the following information:

- Batch Name
- Mail Pieces
- Printed
- Printed on Output
- Printed Filename
- Collection
- Mailmark™ Manifest
- Mailmark™ Batch
- Consignment Notes

The page also contains a list (Fig. 6) where all mail pieces in the mail batch appear. The following information appears in the list:

- Recipient
- Sender
- Postcode
- Organisation

Click the Back to Batches button in the side panel to open the Mail Batches page (Fig. 73).

OPENING MAIL

To open a mail piece that appears in a mail batch, click its name in the list (Fig. 6) on the Mail Batch Detail page (Fig. 74). Following this, the PDF window (Fig. 17) is opened where the mail piece appears.

MORE: For further details about the PDF window, refer to Getting Started > PDF Window and Interface.

SELECTING TODAY'S BATCHES

It will often be useful to view just the mail batches created on the current day in the list on the Mail Batches page (Fig. 73). Instead of specifying the current date in the Printed filter at the top of the list, click the Select Today's Batches button in the side panel (Fig. 5).

MARKING AS COLLECTED

When mail is collected by a mail carrier it is important to mark the associated batch as collected.

Select (tick) the check box next to each applicable mail batch in the list (Fig. 6) on the Mail Batches page (Fig. 73) then click the Mark as Collected button in the side panel (Fig. 5). Following this, the current date and time appears in the Collected column of each selected mail batch.

MARKING AS COLLECTED AND UPLOADING A MAILMARK™

Mail batches will be marked as collected on the same day as they were marked as collected. If there is a manifest loaded it will match the full number of items in that manifest.

MARKING AS NOT COLLECTED

Mail batches can be marked as uncollected if doing so on the same day as they were marked as collected. If a Mailmark™ manifest was also uploaded this will also be cancelled.

Select (tick) the check box next to each applicable mail batch in the list (Fig. 6) on the Mail Batches page (Fig. 73) then click the Cancel Batches button in the side panel (Fig. 5). Following this, the date and time is removed from the Collected column of each selected mail batch.

ADDING A CONSIGNMENT NOTE

So a mail batch appears as a separate entry in a billing report, it can have a consignment note added to it.

To add a consignment note, perform the following actions on the Mail Batches page (Fig. 73):

1. Select (tick) the check box next to each applicable mail batch in the list (Fig. 6).
2. Click the Add Consignment Note button in the side panel to open the Enter Consignment Note pop-up.
3. In the edit box, specify the consignment note.
4. Click the OK button to open the Success pop-up.
5. Click the OK button to close the Success pop-up.

NOTE: The consignment note must be alphanumeric and up to 255 characters in length.

OUTPUTTING MAIL AGAIN

To immediately output all mail pieces in a mail batch again, perform the following actions:

1. Select (tick) the check box next to each applicable mail batch in the list (Fig. 6).
2. Select the required output queue from the output queue list box.
3. Click the Reprint button.

CAUTION: All mail pieces in the selected mail batch(es) are sent to the selected output queue then immediately output even if the output queue is configured for scheduled output.

Reprinting Mail

By scanning the 2D barcode on the letter or postcard of a printed mail piece, the mail piece can be immediately reprinted. This is useful if the original mail piece is damaged or part of it is missing.

All reprint actions are performed on the Reprint Mail page (Fig. 75) which is opened by clicking the Reprint Mail option on the Print Room menu (Fig. 4).

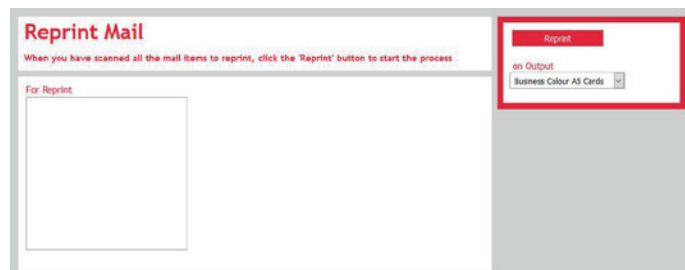


Fig. 75 Reprint Mail page

To reprint mail, perform the following actions on the Reprint Mail page:

1. Click inside the box.
2. Scan the 2D mail barcode located near the recipient's address on a letter or postcard to add the associated Mail ID to the box.
3. Repeat step 2 for all mail pieces.
4. Select an output queue from the Output Queue list box (Fig. 10) in the side panel (Fig. 5).
5. Click the Reprint button in the side panel to assign the scanned mail to the selected output queue and remove it from the Reprint Mail page.

NOTE: Mail is immediately reprinted even if the selected output queue is configured for scheduling.

MORE: For details about reprinting archive mail, refer to Print Room Tasks > Managing Output Queues > Archive Mail > Reprinting.

Scanning Returned Mail

Returned mail can be scanned so the user who posted it is notified and able to view it using the Xerox Hybrid Mail Service web interface.

Scanning of returned mail is performed on the Scan Returned Mail page (Fig. 76) which is opened by clicking the Scan Returned Mail option on the Print Room menu (Fig. 4).

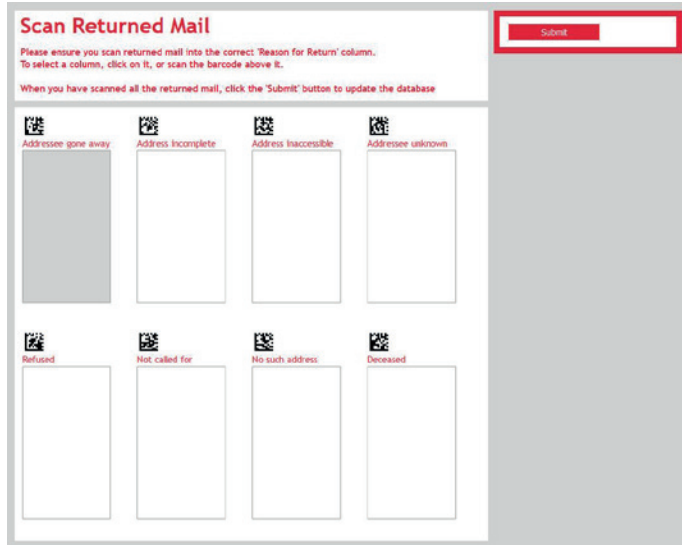


Fig. 76 Scan Returned Mail page

The Scan Returned Mail page contains the following boxes:

- Addressee gone away
- Address incomplete
- Address inaccessible
- Addressee unknown
- Refused
- Not called for
- No such address

Each box corresponds with a Royal Mail reason for return.

To scan Returned mail, perform the following actions on the Scan Returned Mail page:

1. Click inside the box that corresponds with the reason why mail has been returned. Alternatively, scan the 2D barcode above the required box to select it.
2. Scan the 2D mail barcode located near the recipient's address on a letter or postcard to add the associated Mail ID to the box.
3. Repeat steps 1 and 2 for all Returned mail.
4. Click the Submit button in the side panel (Fig. 5).

Following this, mail appears in the list (Fig. 6) on the Returned Mail page (Fig. 67) for each applicable user.

Administrator Tasks

In this section the following information is included:

- Accessing
- Users
- Groups
- Attachments
- Backgrounds
- Templates
- Organisation Details
- Reports

Accessing

If you have administrator or system administrator privileges, the web interface contains an Admin menu (Fig. 4).

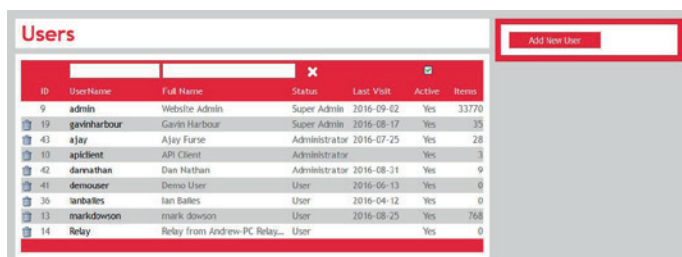
Click the Admin menu to display the following options:

- Users
 - Groups
 - Attachments
 - Backgrounds
 - Templates
 - Organisation Details
 - Reports
-

Users

Anyone wanting to use Xerox Hybrid Mail Service must have a user account. Each user account contains information about the user such as their name and email address, and the user name and password they must specify when logging in to Xerox Hybrid Mail Service.

User administration actions are available on the Users page (Fig. 77) which is opened by clicking the Users option on the Admin menu (Fig. 4).



ID	UserName	Full Name	Status	Last Visit	Active	Items
9	admin	Website Admin	Super Admin	2016-09-02	Yes	33770
19	gavinharbour	Garvin Harbour	Super Admin	2016-08-17	Yes	35
43	ajay	Ajay Furse	Administrator	2016-07-25	Yes	28
13	apiclient	API Client	Administrator		Yes	3
42	darnathan	Dan Nathan	Administrator	2016-08-11	Yes	9
41	demouser	Demo User	User	2016-05-13	Yes	0
36	ianballis	Ian Ballis	User	2016-04-12	Yes	0
13	markdowson	mark dowson	User	2016-08-25	Yes	768
14	Relay	Relay from Andrew-PC Relay...	User		Yes	0

Fig. 77 Users page

The Users page contains a list (Fig. 6) of users registered for your organisation's Xerox Hybrid Mail Service account, together with links to view and modify them, buttons to delete them, and a button to add a new one.

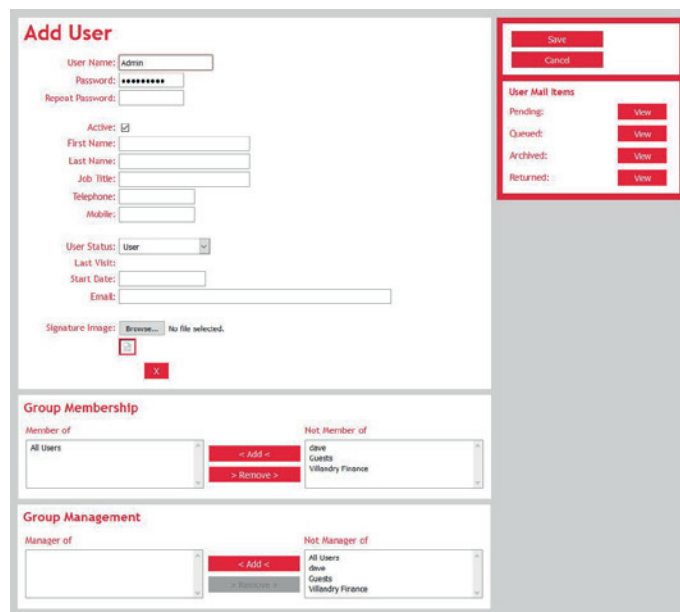
The list contains the following information:

- ID
- User Name
- Name
- Status
- Last Visit
- Active
- Items

MORE: For details about this information, refer to Administrator Tasks > Users > Fields and Options.

ADDING

To add a user to your organisation's Xerox Hybrid Mail Service account, click the Add User button in the side panel (Fig. 5) on the Users page (Fig. 77). Following this, the Add User page (Fig. 78) is opened.



Add User

User Name: Admin
 Password: *****
 Repeat Password:
 Active:
 First Name:
 Last Name:
 Job Title:
 Telephone:
 Mobile:
 User Status: User
 Last Visit:
 Start Date:
 Email:
 Signature Image: Browse... No file selected.

Group Membership

Member of: All Users
 Not Member of: Give Guests, Villandry Finance

Group Management

Manager of: All Users
 Not Manager of: All Users, Give Guests, Villandry Finance

Save
 Cancel

User Mail Items
 Pending: View
 Queued: View
 Archived: View
 Returned: View

Fig. 78 Add User page

Complete each setting then click the Save button in the side panel (Fig. 5) to add the user and return to the Users page (Fig. 77). If the required settings are incomplete or are not completed correctly, a notification dialog (Fig. 16) is opened.

Click the Cancel button in the side panel to prevent the user being added and return to the Users page.

NOTE: Users cannot be added if the Xerox Hybrid Mail Service LDAP feature is enabled. A message notifying you of this is displayed next to the Save button and the Save button is disabled.

VIEWING AND MODIFYING

To view, and if necessary, modify a user, click the user name of the user on the Users page (Fig. 77). Following this, the User Details page is opened.

Update the necessary settings then click the Save button in the side panel (Fig. 5) to modify the associated user and return to the Users page. If the required settings are not completed or are completed incorrectly, a notification dialog (Fig. 16) is opened.

Click the Cancel button in the side panel to prevent the user being modified and return to the Users page.

NOTE: Users cannot be modified if the Xerox Hybrid Mail Service LDAP feature is enabled. A message notifying you of this is displayed next to the Save button and the Save button is disabled.

DELETING

MORE: For details about deleting a user on the Users page (Fig. 77), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

Prior to deletion of a user, a Transfer pop-up (Fig. 79) is opened asking who should take ownership of the user’s mail. Select a user from the list box (Fig. 10) then click the Delete button.

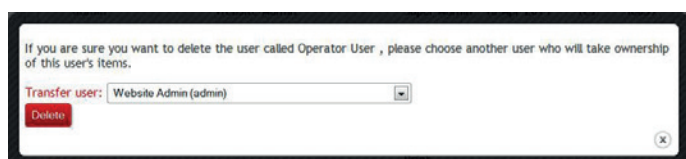


Fig. 79 Transfer pop-up

SETTINGS

When you add or modify a user, the following settings are presented:

FIELD/ OPTION	DESCRIPTION	REQUIRED
User Name	Determines the user name that is used to login. Alphanumeric. No spaces. Min 6, max 20 characters. Case sensitive. Must be unique.	Yes
Password	Determines the password that is used to login. Alphanumeric. No spaces. Min 8, max 12 characters. Case sensitive.	Yes
Repeat Password	Alphanumeric. No spaces. Min 8, max 12 characters. Case sensitive. Must match Password.	Yes
Active	Determines whether the user account is active and accessible by the user. Tick for Yes. Blank for No.	n/a
First Name	Alphanumeric. Max 30 characters.	Yes
Last Name	Alphanumeric. Max 30 characters.	Yes
Job Title	Alphanumeric. Max 20 characters.	No
Telephone	Alphanumeric. Max 15 characters.	No
Mobile	Alphanumeric. Max 15 characters.	No
User Status	Determines the status of the user and as such, the web interface facilities they have access to. Options include: Administrator, User, Operator and System Admin.	Yes

Last Visit	Determines when the user last logged in to Xerox Hybrid Mail Service.	n/a
Start Date	Determines when the user account was created. YYYY-MM-DD	No
Email	Determines the email address that is sometimes used to communicate with the user, e.g. for sending validated and bad address files to. Alphanumeric. Max 255 characters.	No
Signature Image*	Determines the bitmap image of the user’s signature which can be added to mail content. Format: JPG/JPEG. DPI: 300 Height: Between 15mm (177 pixels at 300dpi) and 30mm (354 pixels at 300dpi). Quality: 12 (Maximum).	No
Groups: Member of	Determines the group(s) the user is assigned to. Click a group from the Not a member list then click the Add button to move it to the Member of list.	Yes
Groups: Not a member of	Determines the group(s) the user is not assigned to. Click a group from the Member of list then click the Remove button to move it to the Not a member of list.	No
Groups: Manager of	Determines the group(s) the user is assigned to as a manager. Managers can see all the Pending mail and Archive mail for users in the groups they are a manager of. Click a group from the Not a manager list then click the Add button to move it to the Manager of list.	Yes
Groups: Not a Manager of	Determines the group(s) the user is not assigned to as a manager. Click a group from the Manager of list then click the Remove button to move it to the Not a manager of list.	No

***MORE:** For details about uploading images, refer to Getting Started > Uploading Files.

MAIL PIECES

The side panel (Fig. 5) on the User Details page (Fig. 19) displays the volume of the following mail pieces that have been composed and posted by the user:

- Pending
- Queued
- Archived
- Returned

Viewing

To view a user's mail, click the associated View button in the side panel on the User Details page (Fig. 19). Following this, a page is opened that is similar to the corresponding page accessed from the Mail menu (Fig. 4).

EXAMPLE: If the Archive button is clicked a page similar to the Archive Mail page (Fig. 64) is opened.

MORE: For further details about the corresponding pages, refer to Managing Mail.

Groups

Each Xerox Hybrid Mail Service user is assigned to one or more groups, and groups are assigned to templates and backgrounds. This means users only have access to templates and backgrounds that are associated with the group(s) they are assigned to.

EXAMPLE: A user is assigned to Group A and Group C.

Group A is assigned to Template 1.

Group B is assigned to Template 2.

Group C is assigned to Template 3.

The user would have access to Template 1 and Template 3.

Group administration actions are available on the Groups page (Fig. 80) which is opened by clicking the Groups option on the Admin menu (Fig. 4).

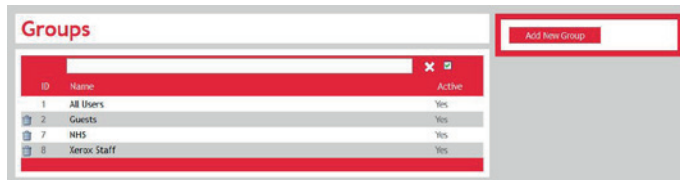


Fig. 80 Groups page

The Groups page contains a list (Fig. 6) of groups defined for your organisation's Xerox Hybrid Mail Service account together with links to view and modify them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- ID
- Name
- Active

MORE: For details about this information, refer to Administrator Tasks > Groups > Settings.

NOTE: An All Users group is provided by default and cannot be deleted.

ADDING

To add a group to your organisation's Xerox Hybrid Mail Service account, click the Add Group button in the side panel (Fig. 5) on the Groups page (Fig. 80). Following this, the Add Group page (Fig. 81) is opened.

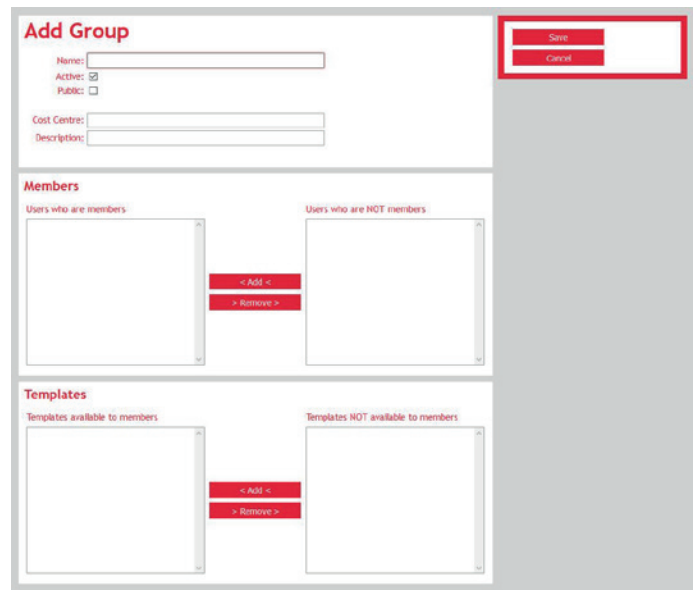


Fig. 81 Add Group page

Complete each field and option then click the Save button in the side panel to add the group and return to the Groups page.

Click the Cancel button in the side panel to prevent the group being added and return to the Groups page.

VIEWING AND MODIFYING

To view, and if necessary, modify a group, click the group name on the Groups page (Fig. 80). Following this, the Modify Group page is opened.

Update the necessary settings then click the Save button to modify the associated group and return to the Groups page.

Click the Cancel button to prevent the group being modified and return to the Groups page.

DELETING

MORE: For details about deleting a group, refer to Getting Started > Workspace Overview > Lists > Deleting Items.

NOTE: The All Users group is the default and cannot be deleted.

SETTINGS

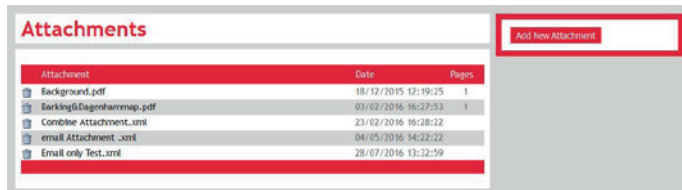
When you add or modify a group, the following settings are presented:

FIELD/OPTION	DESCRIPTION	REQUIRED
Name	Determines the name of the group.	Yes
Active	Determines whether the group is active. Tick for Yes. Blank for No. The All Users group is set to active and cannot be changed.	n/a
Public	Determines whether the group can be selected for users of other organisations. The group cannot be modified by other organisations. Tick for Yes. Blank for No.	n/a
Cost Centre	???	
Description	???	
Users:Members	Determines the users who are members of the group.	n/a
Users:Not members	Determines the users who are not members of the group.	n/a
Templates:Available to	Determines the templates available to members of the group.	n/a
Templates:Unavailable	Determines the templates unavailable to members of the group.	n/a

Attachments

An attachment is a PDF or XML file that is appended to templates. Common attachments include leaflets, maps and price lists.

Attachment administration actions are available on the Attachments page (Fig. 82) which is opened by clicking the Attachments option on the Admin menu (Fig. 4).



Attachment	Date	Pages
Background.pdf	18/12/2015 12:19:25	1
Earking@Egenhammap.pdf	03/02/2016 16:27:53	1
Combie Attachment.xml	23/02/2016 16:28:22	
email Attachment .xml	04/05/2016 14:22:22	
Email only Test.xml	28/07/2016 13:32:59	

Fig. 82 Attachments page

The Attachments page contains a list (Fig. 6) of attachments defined for your organisation's Xerox Hybrid Mail Service account together with links to view them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- Attachment
- Date
- Pages

ADDING

To add an attachment to your organisation's Xerox Hybrid Mail Service account, click the Add Attachment button in the side panel (Fig. 5) on the Attachments page (Fig. 82). Following this, an upload dialog (Fig. 20) is opened where the attachment you wish to add can be specified then uploaded.

MORE: For details about uploading an attachment, refer to Getting Started > Uploading Files.

MORE: For details about the page size requirement of an attachment, and the areas on a page that must be avoided in an attachment, refer to Getting started > Mail Considerations.

OPENING

Click the name of an attachment on the Attachments page (Fig. 82) to open it. If the attachment is a PDF file it is opened in the PDF window (Fig. 17). If the attachment is an XML file it is opened in a new browser window.

MORE: For further details about viewing PDF attachments, refer to Getting Started > PDF Window and Interface.

DELETING

MORE: For details about deleting an attachment on the Attachments page (Fig. 82), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

NOTE: When an attachment is deleted it will also be removed from mail templates that use it. However, mail created prior to the deletion will retain it.

Backgrounds

A background is a PDF file that is applied to a template in order to create a background for the template it is applied to. A common use for a background is a letterhead.

Background administration actions are available on the Backgrounds page (Fig. 83) which is opened by clicking the Backgrounds option on the Admin menu (Fig. 4).

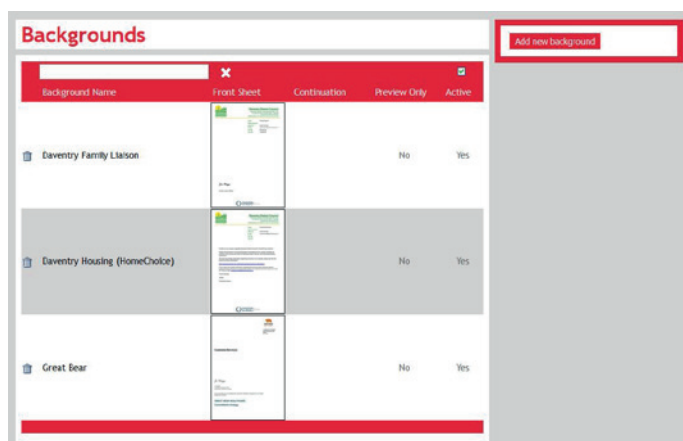


Fig. 83 Backgrounds page

The Backgrounds page contains a list (Fig. 6) of backgrounds defined for your organisation's Xerox Hybrid Mail Service account, together with links to view and modify them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- Background Name
- Front Sheet
- Continuation
- Preview Only
- Active

MORE: For details about this information, refer to Administrator Tasks > Backgrounds > Settings.

ADDING

To add a background to your organisation's Xerox Hybrid Mail Service account, click the Add Background button in the side panel (Fig. 5) on the Backgrounds page (Fig. 83). Following this, the Add Background page (Fig. 84) is opened.

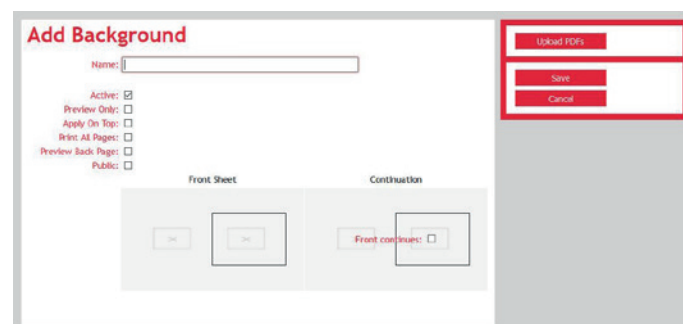


Fig. 84 Add Background page

Complete each setting then click the Save button in the side panel to add the background and return to the Backgrounds page.

Click the Cancel button in the side panel to prevent a background being added and return to the Backgrounds page.

VIEWING AND MODIFYING

To view, and if necessary, modify a background, click the associated background name on the Backgrounds page (Fig. 83). Following this, the Background Details page is opened.

Update the necessary settings then click the Save button in the side panel (Fig. 5) to modify the associated background and return to the Backgrounds page.

Click the Cancel button in the side panel to prevent a background being modified and return to the Backgrounds page.

Removing a Background PDF File

To remove a front sheet or continuation sheet PDF file from a background, click the Remove button that appears on top of the associated PDF file on the Background Details page.

DELETING

MORE: For details about deleting a background on the Backgrounds page (Fig. 83), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

SETTINGS

When you add or modify a background, the following fields are presented:

FIELD/ OPTION	DESCRIPTION	REQUIRED
Name	Determines the name of the background. Alphanumeric. Max 40 characters.	Yes
Active	Determines whether the background is active and accessible to templates. Tick for Yes. Blank for No.	n/a
Preview Only	Determines whether the background only appears in the preview but not when posted (printed). Useful when printing to pre-printed stationery. Tick for Yes. Blank for No.	n/a
Apply On Top	Determines whether the background image is placed on top of the letter or postcard content. Tick for Yes. Blank for No.	n/a
Print All Pages	Determines whether all pages of the background are printed even if there is no content on the page of a letter or postcard. Tick for Yes. Blank for No.	n/a
Preview Back Page	Determines whether the Compose Mail page (Fig. 51) shows a preview thumbnail of the back page of the background. This is useful when composing postcards. The background PDF must have two pages for this to take effect. Tick for Yes. Blank for No.	n/a
Public	Determines whether the background can be selected for templates used by other organisations. The background cannot be modified by other organisations. Tick for Yes. Blank for No.	n/a
Front Sheet* †	The PDF file used as the front sheet of the background. Size: Refer to Getting Started > Mail Considerations > Page Size. Max pages: 2. Select a PDF by clicking the Upload PDFs button in the side panel. Click the Remove button to remove the background.	No

Continuation* †	The PDF file used as the continuation sheet(s) of the background. Size: Refer to Getting Started > Mail Considerations > Page Size. Max pages: 2. Select a PDF by clicking the Upload PDFs button in the side panel. Click the Remove button to remove the background.	No
Front Continues	Determines whether the front sheet PDF file is used for all continuation sheets of the letter or postcard. Only appears if no Continuation PDF file is specified. Tick for Yes. Blank for No.	n/a

If the above conditions are not satisfied or required settings are not completed, a notification dialog (Fig. 16) is opened.

***MORE:** For details about uploading backgrounds, refer to Getting Started > Uploading Files.

Templates

Templates are predefined mail pieces that can be selected by users on the Compose Mail page (Fig. 51).

All template administration actions are available on the Templates page (Fig. 85) which is opened by clicking the Templates option on the Admin menu (Fig. 4).

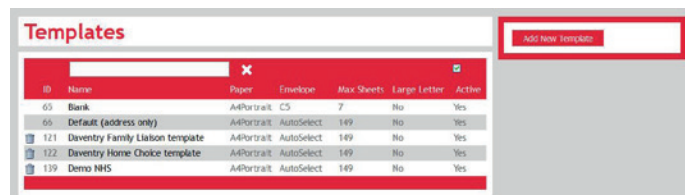


Fig. 85 Templates page

The Templates page contains a list (Fig. 6) of templates already defined for your organisation's Xerox Hybrid Mail Service account, together with links to view and modify them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- ID
- Name
- Paper
- Envelope
- Max Sheets
- Large Letter
- Active

MORE: For details about this information, refer to Administrator Tasks > Templates > Settings.

ADDING

To add a template to your organisation's Xerox Hybrid Mail Service account, click the Add Template button in the side panel (Fig. 5) on the Templates page (Fig. 85). Following this, the Add Template page (Fig. 86) is opened.

Add Template

Title:

Active:

Read-only:

Default Selection:

Public:

Background:

Template Category:

Background Preview:

Front Sheet: Continuation:

Paper Size:

Envelope:

Output Queue:

Allow First Class:

Allow Colour:

Allow Simplices:

Force Pending:

Scheduled Output:

Name and Address will go here

Groups

Available to members of:

NOT Available to members of:

PDF/XML Attachments

PDF/XML files to attach:

Available PDF/XML files:

Fig. 86 Add Template page

Complete each field and option then click the Save button in the side panel to add the template and return to the Templates page.

Click the Cancel button in the side panel to prevent the template being added and return to the Templates page.

Click the Preview button in the side panel to open the PDF window (Fig. 17) where the content of the template appears.

MORE: For details about writing and manipulating template content, refer to Common Mail Operations, and Composing and Posting Mail > Writing Content.

VIEWING AND MODIFYING

To view, and if necessary, modify a template, click its name in the list (Fig. 6) on the Templates page (Fig. 85). Following this, the Template Details page is opened.

Change the necessary settings then click the Save button in the side panel (Fig. 5) to modify the associated template and return to the Templates page.

Click the Cancel button in the side panel to prevent the template being modified and return to the Templates page.

Click the Preview button in the side panel to open the PDF window (Fig. 17) where the content of the template appears.

DELETING

MORE: For details about deleting a template on the Templates page (Fig. 85), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

SETTINGS

When you add or modify a template the following settings are presented:

FIELD/ OPTION	DESCRIPTION	REQUIRED
Name	Determines the template name that is displayed and selectable by users in a list box (Fig. 10) on the Compose Mail page (Fig. 51). Alphanumeric. Max 40 characters.	Yes
Active	Determines whether the template is active and accessible by users on the Compose Mail page. Tick for Yes. Blank for No.	n/a
Read-only	Determines whether the content of the mail body on the Compose Mail page can be modified by users. Tick for No. Blank for Yes.	n/a
Default Selection	Determines whether the template appears as the default on the Compose Mail page. If more than one template has this enabled (ticked) then the default is determined alphabetically.	n/a
Public	Determines whether the template is available to other organisations on the Compose Mail page. Tick for Yes. Blank for No.	n/a
Background	Determines the background that is applied to the template.	No

Category	???	
Background Preview	Displays a preview of the front sheet and continuation sheet backgrounds associated with the background specified for the Background option.	n/a
Paper Size	Determines the paper size and orientation of the template. The option is unavailable if a background has been specified for the Background option and instead the page size of the associated PDF file determines the paper size of the template.	Yes or No if the Background option has a background specified.
Envelope	Determines the envelope that the associated mail will be inserted into. The choice of envelope determines how many sheets mail using the template can have.	Yes
Output Queue	Determines the default output queue that mail created using the template is posted to.	Yes
Allow First Class	Determines whether mail using the template can be mailed first class. Tick for Yes. Blank for No.	n/a
Allow Colour	Determines whether mail using the template can be printed in colour instead of mono. Tick for Yes. Blank for No.	n/a
Allow Simplex	Determines whether mail using the template can be printed simplex instead of duplex. Tick for Yes. Blank for No.	n/a
Force Pending	Determines whether mail using the template becomes Pending mail after being posted. Tick for Yes. Blank for No.	n/a
Scheduled Output	Determines whether mail using the template is scheduled for release from an output queue instead of being released manually. ???	n/a
Mail Body*	Determines the content of the mail body on the Compose Mail page.	No
Groups: Available to Members of	Determines what group(s) the template is available to. Click a group in the Not available to members of box then click the Add button to move it to the Available to members of box.	Yes

Groups: Not Available to Members of	Determines what group(s) the template is unavailable to. Click a group in the Available to members of box then click the Remove button to move it to the Not available to members of box.	No
PDF/XML Attachments: Attach [^]	Determines the PDF or XML attachments that are appended to mail and appear by default in the Selected box on the Compose Mail page. Click the name of an attachment in the Available box then click the Add button to move it to the Attach box.	No
PDF/XML Attachments: Available [^]	Determines the attachments that appear in the Available box on the Compose Mail page. Click the name of an attachment in the Attach box then click the Remove button to move it to the Available box.	No

If the above conditions are not satisfied or required settings are not completed, a notification dialog (Fig. 16) is opened when the template is saved.

***MORE:** For details about specifying mail body content, refer to Composing and Posting Mail > Writing Content.

^MORE: For details about determining the order of attachments, refer to Composing and Posting Mail > Appending Attachments > Order of Attachments.

†MORE: For details about uploading attachments so they appear in the Available box, refer to Administrator Tasks > Attachments.

Organisation Details

Each Xerox Hybrid Mail Service system is assigned to an organisation. Details about the organisation such as its name and address, and pricing details need to be specified and saved.

Organisation administration actions are available on the Organisation Details page (Fig. 87) which is opened by clicking the Organisation Details option on the Admin menu (Fig. 4).



Fig. 87 Organisation Details page

Modify the necessary settings then click the Save button in the side panel (Fig. 5) to save the changes and return to the Home page (Fig. 3).

Click the Cancel button in the side panel to prevent the organisation details being saved and return to the Home page.

SETTINGS

The following organisation settings are presented:

FIELD/ OPTION	DESCRIPTION	REQUIRED
Organisation Name	Determines the name of the organisation. Alphanumeric. Max 50 characters.	Yes
Active	Determines whether the organisation is active. Tick for Yes. Blank for No.	n/a
Address 1	Determines the first line of the address. Alphanumeric. Max 30 characters.	No
Address 2	Determines the second line of the address. Alphanumeric. Max 30 characters.	No

Address 3	Determines the third line of the address. Alphanumeric. Max 30 characters.	No
Town / City	Determines the town/city. Alphanumeric. Max 30 characters.	Yes
County	Determines the county. Drop-down list containing UK counties.	Yes
Postcode	Determines the postcode. Alphanumeric. Max 8 characters.	Yes
Address Font	Determines the font used for the recipient address and postcode of each Xerox Hybrid Mail Service letter. Select a font from the list box (Fig. 10).	Yes
Size	Determines the size of the font used for the recipient address and postcode of each Xerox Hybrid Mail Service letter. Select a size from the list box.	Yes
Admin User Name	Indicates the user name of the administrator of the organisation. This field cannot be modified.	n/a
Admin Email	Indicates the email address of the administrator of the organisation. This field cannot be modified.	n/a
Default Mail Indentation	Determines how far from the lefthand edge of a sheet mail body text is indented. 5 to 100 mm.	No
Archive Period	Determines the number of days Archive mail remains in Xerox Hybrid Mail Service before it is deleted. 0 to 99999.	Yes
Check Address Validity	Determines whether the address of mail is checked for validity when posted, and what happens if it is invalid. Select an option from the list box: No Check – Does not check validity. Warn – Displays a confirmation dialog (Fig. 15) if invalid. Block – Prevents the mail being posted if invalid.	n/a
Check Address Validity If	Determines how the address of mail is checked for validity. Select an option from the list box: Postcode is invalid. Postcode and Post Town are both invalid. Address is not a unique premises.	n/a

Check for Other Addresses	Determines whether other pages of a mail piece are checked for an address that differs from the one on the compulsory letter or postcard, and what happens if an address is found. This is used to help prevent more than one mail piece being posted in the same envelope. No check – Does not check. Warn – Displays a confirmation dialog if a different address is found. Block – Prevents the mail being posted if found.	n/a
Scheduled Output	Determines whether mail is scheduled for release from an output queue instead of being released manually. ??? Tick for Yes. Blank for No.	n/a
Options Set	Determines the options set used by the organisation. For details about managing option sets and the pricing information they contain, refer to System Administrator Tasks > Option Sets.	

NOTE: If the above conditions are not satisfied or required settings are not completed, a notification dialog (Fig. 16) is opened.

Reports

Xerox Hybrid Mail Service administrators can schedule reports that provide valuable information about how Xerox Hybrid Mail Service is being used and who is using it. These reports are delivered as CSV file attachments to a pre-determined email address.

Available reports appear on the Reports page (Fig. 88) which is opened by clicking the Reports option on the Admin menu (Fig. 4).

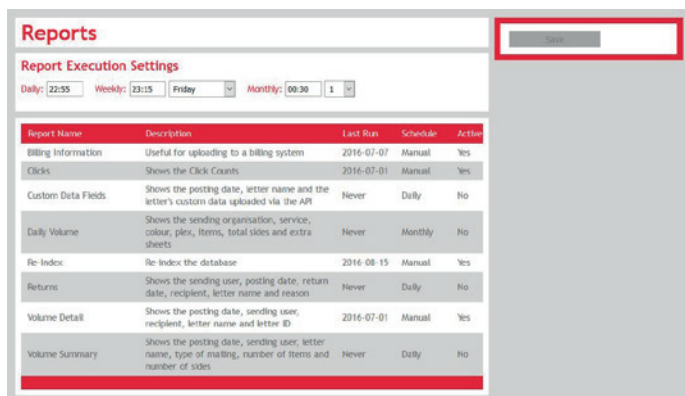


Fig. 88 Reports page

The Reports page displays the name of each report, a description, when it was last run, when it is scheduled to run and whether it is active.

The following reports are available:

NAME	DESCRIPTION
Billing Information	Useful for uploading to a billing system.
Clicks	Shows the number of mail pieces that have been posted.
Custom Data Fields	Shows the posting date, mail name and the mail's custom data uploaded via the API.
Daily Volume	Shows the sending organisation, service, colour, duplex/simplex, number of mail pieces, number of sides and number of extra sheets.
Re-index	Re-indexes the database.
Returns	Shows the sending user, posting date, return date, recipient, mail name and reason for return.
Volume Detail	Shows the posting date, user, recipient, mail name and mail ID.
Volume Summary	Shows the posting date, user, mail name, type of mailing, number of mail pieces and number of sides.

Report execution settings also appear that allow daily, weekly and monthly schedule settings to be specified.

SPECIFYING REPORT EXECUTION SETTINGS

The report execution settings on the Reports page (Fig. 88) determine the time, and if applicable, the day when scheduled reports are run.

Use the edit boxes (Fig. 9) and list boxes (Fig. 10) to specify a time/day for daily, weekly and monthly schedules. When specified, click the Save button in the side panel (Fig. 5) to apply and save the changes.

MODIFYING

Reports that appear on the Reports page (Fig. 88) must be activated, configured to run at a scheduled time and have an email recipient specified.

Click the name of the report to open the Modify Report pop-up (Fig. 89).

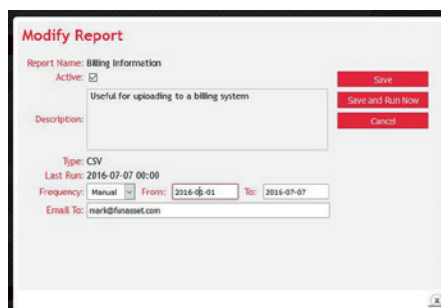


Fig. 89 Modify Report pop-up (Custom Data Fields)

Specify or modify the necessary settings then click the Save button to save the changes and close the Modify Report pop-up. Alternatively, click the Save and Run Now button to save the changes, run the report and close the pop-up.

Click the Cancel button to prevent any changes being saved and close the Schedule Report pop-up.

Settings

The following report settings are available:

FIELD/ OPTION	DESCRIPTION	REQUIRED
Report Name	Indicates the name of the report.	n/a
Active	Determines whether the report is active. Tick for yes, blank for no.	n/a
Description	Describes the report.	n/a
Type	Indicates the file format of the report.	n/a
Last Run	Indicates when the report was last run.	n/a
Frequency	Determines when the report is run: Daily, Weekly, Monthly.	Yes
Email To	Determines the email address where the report is emailed to.	Yes

System Administrator Tasks

In this section the following information is included:

- Accessing
- Organisations
- Output Queues
- Envelopes
- Option Sets
- Licensing
- Database Management

Accessing

If Xerox Hybrid Mail Service is configured to use system admin facilities and you are logged in as a system administrator, the web interface contains a System Admin menu (Fig. 4).

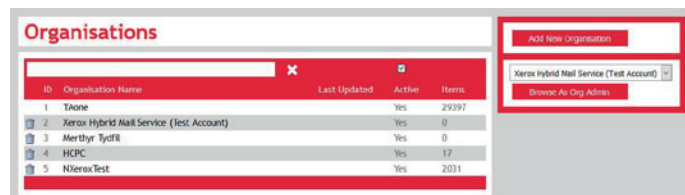
Click the System Admin menu to display a drop-down list containing the following options:

- Organisations
 - Output Queues
 - Envelopes
 - Option Sets
 - Licence
-

Organisations

Businesses and organisations that wish to use Xerox Hybrid Mail Service require an organisation account.

All organisation administration actions are available on the Organisations page (Fig. 90) which is opened by clicking the Organisations option on the System Admin menu (Fig. 4).



ID	Organisation Name	Last Updated	Active	Items
1	Taone	Yes	29397	
2	Xerox Hybrid Mail Service (Test Account)	Yes	0	
3	Merthyr Tydfil	Yes	0	
4	HCPC	Yes	17	
5	NXeroxTest	Yes	2031	

Fig. 90 Organisations page

The Organisations page contains a list (Fig. 6) of organisations already defined, together with links to view and modify them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- ID
- Name
- Last Updated
- Active
- Items

MORE: For details about this information, refer to System Administrator Tasks > Organisations > Settings.

ADDING

To add an organisation, click the Add Organisation button in the side panel (Fig. 5) on the Organisations page (Fig. 90). Following this, the Organisation Details page (Fig. 87) is opened.

Complete each setting then click the Save button in the side panel to add the organisation then return to the Organisations page.

Click the Cancel button in the side panel to prevent the organisation being added and return to the Organisations page.

VIEWING AND MODIFYING

To view, and if necessary, modify an organisation, click its name in the list (Fig. 6) on the Organisations page (Fig. 90). Following this, the Organisation Details page (Fig. 87) is opened.

Change the necessary settings then click the Save button in the side panel (Fig. 5) to modify the associated organisation and return to the Organisations page.

Click the Cancel button in the side panel to prevent the organisation being modified and return to the Organisations page.

DELETING

MORE: For details about deleting an organisation on the Organisations page (Fig. 87), refer to Getting Started > Workspace Overview > Lists > Deleting Items.

SETTINGS

MORE: For details about each field and option that appears on the Organisation Details page, refer to Administrator Tasks > Organisations > Settings.

BROWSING AS AN ORGANISATION'S ADMINISTRATOR

To view web interface pages and content as an administrator of an organisation, perform the following actions in the side panel (Fig. 5) on the Organisations page (Fig. 90):

1. Click the list box then select the required organisation.
2. Click the Browse as Org Admin button

To stop browsing as an administrator for the selected organisation, click the Cancel Browse As button.

Output Queues

Output queues are what mail appears in prior to being printed on an associated output such as a printer or file.

Output queue administration actions are available on the Output Queues page (Fig. 91) which is opened by clicking the Output Queues option on the System Admin menu (Fig. 4).

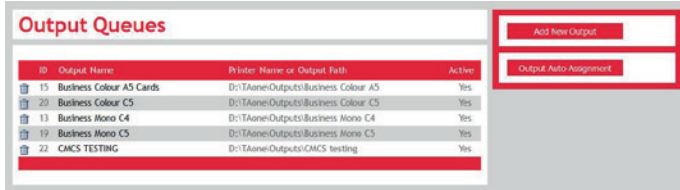


Fig. 91 Output Queues page

The Output Queues page contains a list (Fig. 6) of output queues already defined together with links to view and modify them, buttons to delete them, and a button to add a new one.

The list contains the following information:

- ID
- Name
- Printer Name or Output Path
- Active

MORE: For details about this information, refer to Administrator Tasks > Output Queues > Settings.

ADDING

To add an output queue, click the Add Output Queue button in the side panel (Fig. 5) on the Output Queues page (Fig. 91). Following this, the Add Output Queue page (Fig. 92) is opened.

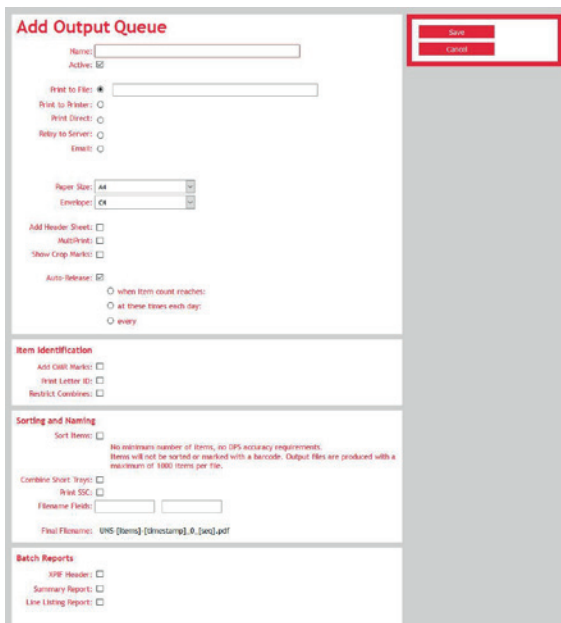


Fig. 92 Add Output Queue page

Complete each setting then click the Save button in the side panel to add the output queue and return to the Output Queues page.

Click the Cancel button in the side panel to prevent the output queue being added and return to the Output Queues page.

VIEWING AND MODIFYING

To view, and if necessary, modify an output queue, click its name in the list (Fig. 6) on the Output Queues page (Fig. 91). Following this, the Output Queue Detail page is opened that contains the same settings as the Add Output Queue page (Fig. 92).

Modify the necessary settings then click the Save button in the side panel (Fig. 5) to save the output queue and return to the Output Queues page.

Click the Cancel button in the side panel to prevent the output queue being modified and return to the Output Queues page.

DELETING

MORE: For details about deleting an output queue from the list (Fig. 6) on the Output Queues page (Fig. 91), refer to Getting Started > Web Interface Overview > Lists > Deleting Items.

SETTINGS

When you add or modify an output queue, the following settings are presented:

SETTING	DESCRIPTION	REQUIRED
Name	Determines the name of the output queue. Alphanumeric. Max 40 characters.	Yes
Active	Determines whether the output queue is active and accessible by users. Tick for Yes. Blank for No.	n/a
Print to File	Determines whether the output queue prints to file. Selection is shared with the Print to Printer, Print Direct, Relay to Server and Email settings. The associated edit box (Fig. 9) requires a fully qualified path to the folder where the file will be saved. This folder can be local, mapped or on a network share (UNC format), and must exist.	At least one item in the radio button group

Print to Printer	Determines whether the output queue prints to a printer. Selection is shared with the Print to File, Print Direct, Relay to Server and Email settings. The associated list box (Fig. 10) determines the name of the printer to be used by the output queue. Printers that appear in the list box are those available to the Xerox Hybrid Mail Service server.	At least one item in the radio button group	Envelope	Determines the name of the envelope used by the output queue. For details about managing envelopes, refer to System Administrator Tasks > Envelopes.	Yes
Print Direct	Determines whether the output queue prints directly to a print queue. Selection is shared with the Print to File, Print to Printer, Relay to Server and Email settings. The associated To edit box determines the name of the server where the print queue is located. The associated On list box determines whether an LPR Queue name or Port number is used. The associated edit box determines the LPR queue name or port number.	At least one item in the radio button group	Add Header Sheet	Determines whether a header (lead) sheet is output with a mail batch. The content of the header sheet mirrors the information presented on the Mail Batch Detail page (Fig. 74). Tick for Yes. Blank for No.	n/a
Relay to Server	Determines whether the output queue sends associated mail to another Xerox Hybrid Mail Service (relay)server. Selection is shared with the Print to File, Print to Printer, Print Direct and Email settings. The associated To edit box determines the name or IP address of the relay server. The associated Template edit box determines the name of the template that will be applied to mail pieces on the relay server. This template must exist on both the local server and relay server. The associated User edit box determines the user name of the Xerox Hybrid Mail Service account that will be used to connect to the relay server. This user name must exist on the local server and relay server.	At least one item in the radio button group	Multiprint	Determines whether multiple mail pieces are printed on a single sheet. Tick for Yes. Blank for No. The associated list box determines whether mail pieces are printed Two Up or Four Up. Note: Four Up is only supported for mail with an A5 or SRA5 paper size.	n/a
Email	Determines whether the output queue emails associated mail. Selection is shared with the Print to File, Print to Printer, Print Direct and Relay to Server settings.	At least one item in the radio button group	Show Crop Marks	Determines whether crop marks are added to mail pieces. Tick for Yes. Blank for No.	n/a
Paper Size	Determines the size of the paper supported by the output queue.	Yes	Auto Release	Determines whether the output queue automatically releases mail when the selected criteria is satisfied. Tick for Yes. Blank for No. The associated when item count reaches radio button and edit box determines the number of mail pieces that must be accumulated before the output queue is released. The associated at these times each day radio button and edit box determines the time(s) of day when the output queue is released. Format is HH:MM and multiple times are separated by a comma, e.g. 13:30,17:00. The Full Trays Only check box determines whether only mail that has reached the tray capacity is released or not. Tick for Yes. Blank for No. The every radio button and list box determines the number of minutes between each release.	No
			Add OMR Marks	Determines whether OMR marks are added to mail so folder inserter equipment can be used. Tick for Yes. Blank for No. The associated Use OMR Set list box determines what OMR set is used. Options in the list box marked with an asterisk (*) are configured in Mail Markup Pro.	No

Print Mail ID	Determines whether a mail ID barcode is added to mail. If Mailmark™ sorting is specified for the Sort Items setting (see below) a mail ID barcode is not required. For details about specifying where the mail ID barcode appears, refer to System Administrator Tasks > Envelopes > Settings.	No
Restrict Combines	Determines whether combined mail is restricted to the Max Sheets of Paper setting for the selected envelope. Tick for Yes. Blank for No. If the check box is not selected (unticked) then combined mail that exceeds the Max Sheet of Paper setting is moved to an output queue with a compatible envelope.	No
Mailsort	Determines whether a Royal Mail Mailsort service is used. Tick for Yes. Blank for No. The associated list box determines the type of Royal Mail Mailsort to be performed. Mailsort requirements and the maximum number of mail pieces per output file are detailed below the setting.	No
Combine Short Trays	Determines whether mail associated with trays that do not meet the minimum volume are accumulated in a single unsorted output file. Tick for Yes. Blank for No.	No
Filename Fields	Determines one or two prefixes for output file filenames. Each prefix is separated by a dash (-). Alphanumeric. Moving focus away from a Filename Fields edit box updates the Final Filename value below.	No

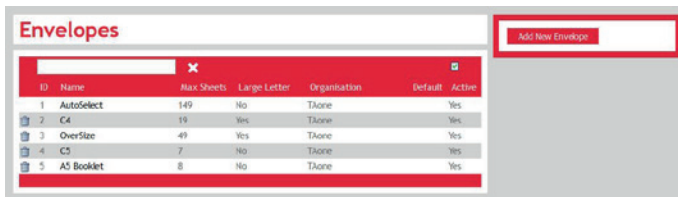
Final Filename	Indicates how output file filenames are named. Format: [Prefix]-[Prefix]-[SSC or UNS (unsorted)]-[Number of mail pieces]-[Timestamp]_[Output Queue ID]_[Sequential number].pdf	n/a
XPIF Header	Determines whether an XPIF header is prefixed to output files. The XPIF header is interpreted by the printer in order to determine the paper trays to be used for the first and subsequent sheets of mail pieces. Tick for Yes. Blank for No. The associated First Sheet and Other Sheets edit boxes determine the media names of paper trays to be used for the first sheet and subsequent sheets of a mail piece. The setting is only available when the Print to File setting is selected.	No
Summary Report	Determines whether a summary report is created each time the output queue is released. Tick for Yes. Blank for No. The associated Send Report To edit box determines the folder name (???) where an XML file of the summary report is written, or one or more email addresses a CSV file of the summary report is sent to. Separate multiple email addresses with a semi colon (;).	
Line Listing Report	Determines whether a line listing report is printed/written ????	n/a

NOTE: If the above conditions are not satisfied or required settings are not completed, a notification dialog (Fig. 16) is opened.

Envelopes

Configurations for envelopes must be created to cater for the varied mailing needs of users and the different size and location of envelope address windows. Once created, an envelope can then be assigned to an output queue on the Output Queue Details page (Fig. 72) to ensure the mail sent to that output queue is suitable for the envelope it will be inserted in.

Envelope administration actions are performed on the Envelopes page (Fig. 93) which is opened by clicking the Envelopes option on the System Admin menu (Fig. 4).



ID	Name	Max Sheets	Large Letter	Organisation	Default	Active
1	AutoSelect	149	No	TNone	Yes	Yes
2	C4	19	Yes	TNone	Yes	Yes
3	OverSize	49	Yes	TNone	Yes	Yes
4	C5	7	No	TNone	Yes	Yes
5	A5 Booklet	8	No	TNone	Yes	Yes

Fig. 93 Envelopes page

The Envelopes page contains a list (Fig. 6) of envelopes already created, with links to view and modify them, buttons to delete them, and a button to add a new one.

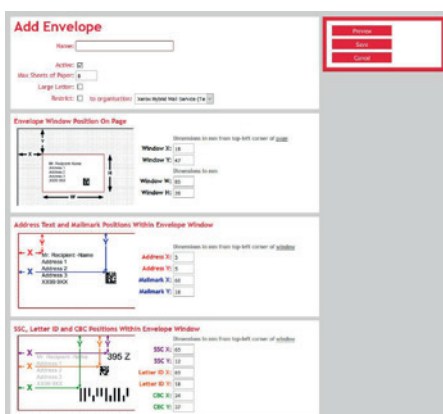
The list contains the following information:

- ID
- Name
- Max Sheets
- Large Letter
- Organisation
- Default
- Active

MORE: For details about this information, refer to System Administrator Tasks > Envelopes > Settings.

ADDING

To add an envelope, click the Add Envelope button in the side panel (Fig. 5) of the Envelopes page (Fig. 93). Following this, the Add Envelope page (Fig. 94) is opened.



The Add Envelope page includes the following sections:

- Name:** A text input field for the envelope name.
- Max Sheets of Paper:** A numeric input field.
- Large Letter:** A checkbox.
- Organisation:** A dropdown menu.
- Envelope Window Position On Page:** A diagram showing the envelope window on a page with input fields for Window X, Y, X2, and Y2.
- Address Text and Markers Positions Within Envelope Window:** A diagram showing the address window with input fields for Address X, Y, X2, and Y2.
- S&C Letter ID and CSC Positions Within Envelope Window:** A diagram showing the S&C window with input fields for S&C X, Y, X2, and Y2.

Fig. 94 Add Envelope page

Complete each field and option then click the Save button in the side panel to save the envelope and return to the Envelopes page.

Click the Cancel button in the side panel to prevent the envelope being added and return to the Envelopes page (Fig. 93).

VIEWING AND MODIFYING

To view, and if necessary, modify an envelope, click its name in the list (Fig. 6) on the Envelopes page (Fig. 93). Following this, the Envelope Details page is opened that contains the same settings as the Add Envelope page (Fig. 94).

Modify the necessary settings then click the Save button in the side panel to save the envelope and return to Envelopes page.

Click the Cancel button in the side panel to prevent the envelope being modified and return to the Envelopes page.

PREVIEWING

To ensure the dimensions and position of an envelope's address window are correct, a page displaying the address window can be previewed then printed. After printing, the page can be used to perform a 'tap test' to ensure the address details appear within the window of the intended envelope.

To preview the location and dimension of an envelope's address window, click the Preview button in the side panel (Fig. 5) on the Add Envelope page (Fig. 94) or Envelope Details page. Following this, the PDF Window (Fig. 17) is opened where the address window and a sample recipient name and address appear.

Use the print option in the PDF interface to print the page.

MORE: For further details about the PDF Window, refer to Getting Started > Web Interface Overview > PDF Window and Interface.

DELETING

MORE: For details about deleting an envelope from the list (Fig. 6) on the Envelopes page (Fig. 93), refer to Getting Started > Web Interface Overview > Lists > Deleting Items.

SETTINGS

When you add or modify an envelope, the following settings are presented:

SETTING	DESCRIPTION	REQUIRED
Name	Determines the name of the envelope.	Yes
Active	Determines whether the envelope is active and accessible by users. Tick for Yes. Blank for No.	n/a
Max Sheets of Paper	Determines the maximum number of sheets that the envelope can physically hold. Typically a DL envelope can hold 4 sheets and a C5 can hold 8 sheets. The value specified is checked prior to a mail piece being posted and if the limit is exceeded the mail piece is not posted.	Yes
Large Letter	Determines whether the envelope is deemed to be a large letter format (max length = 353mm, max width = 250mm, max thickness = 25mm, max weight = 750g). Indicating whether the envelope is a large letter format affects the display cost within Xerox Hybrid Mail Service for posting a mail piece. Tick for Yes. Blank for No.	n/a
Restrict	Determines whether the envelope is only available to the organisation indicated by the To Organisation option (see below). Tick for Yes. Blank for No.	n/a
To Organisation	Determines the organisation the envelope is available to if the restrict option is selected (ticked).	Yes if the Restrict option is selected (ticked)
Envelope Window Position X	Determines how far horizontally (X) in millimeters the top left corner of the envelope window is located from the left edge of the envelope.	Yes
Envelope Window Position Y	Determines how far vertically (Y) in millimeters the top left corner of the envelope window is located from the top edge of the envelope.	Yes

Envelope Window W	Determines the width in millimeters of the envelope window.	Yes
Envelope Window H	Determines the height in millimeters of the envelope window.	Yes
Address Position X	Determines how far horizontally (X) in millimeters the top left corner of the address is located from the left edge of the envelope.	Yes
Address Position Y	Determines how far vertically (Y) in millimeters the top left corner of the address is located from the top edge of the envelope.	Yes
Mailmark™ Position X	Determines how far horizontally (X) in millimeters the top left corner of the Mailmark™ is located from the left edge of the envelope.	No
Mailmark™ Position Y	Determines how far vertically (Y) in millimeters the top left corner of the Mailmark™ is located from the top edge of the envelope.	No
SSC Position X	Determines how far horizontally (X) in millimeters the top left corner of the SSC is located from the left edge of the envelope.	No
SSC Position Y	Determines how far vertically (Y) in millimeters the top left corner of the SSC is located from the top edge of the envelope.	No
Mail ID Position X	Determines how far horizontally (X) in millimeters the top left corner of the mail ID barcode is located from the left edge of the envelope.	Yes
Mail ID Position Y	Determines how far vertically (Y) in millimeters the top left corner of the mail ID barcode is located from the top edge of the envelope.	Yes
CBC Position X	Determines how far horizontally (X) in millimeters the top left corner of the CBC is located from the left edge of the envelope.	No
CBC Position Y	Determines how far vertically (Y) in millimeters the top left corner of the CBC is located from the top edge of the envelope.	No

Option Sets

Option sets enable multiple pricing and last posting time settings to be specified. This enables different organisations to use different option sets.

Options sets appear in a list (Fig. 6) on the Option Sets page (Fig. 95) which is opened by clicking the Option Sets option on the System Admin menu (Fig. 4).

[IMAGE REQ]

Fig. 95 Option Sets page

ADDING

To add an option set, click the Add Option Set button in the side panel (Fig. 5) of the Option Sets page (). Following this, the Add Option Set page () is opened.

[IMAGE REQ]

Fig. 96 Add Option Set page

Complete each setting then click the Save button in the side panel to save the option set and return to the Option Sets page.

Click the Cancel button in the side panel to prevent the option set being added and return to the Option Sets page ().

VIEWING AND MODIFYING

To view, and if necessary, modify an option set, click the Option Set list box (Fig. 10) on the Option Sets page () then click the name of the required option. Following this, the values of the settings change.

Modify the necessary settings then click the Save button in the side panel to save the option set. A notification dialog (Fig. 16) appears to indicate the option set has been saved.

Click the Cancel button in the side panel to prevent the option set being modified.

SETTINGS

When you add or modify an option set, the following settings are presented:

OPTION	DESCRIPTION	REQUIRED
Last Posting Time	Determines the last posting time for mail. This is used to calculate the Time Left (HH:MM:SS) that appears near the top of each page of the web interface. When the Time Left expires, ---:---:--- is displayed HH:MM	No
Base Price*	The cost in pence of a single envelope and second class postage.	No
First Class Premium*	The difference in pence between the cost of first class premium and second class postage.	No
Large Letter Premium*	The difference in pence between the cost of first class premium and second class postage.	No
Sheet*	The cost of a single sheet of paper.	No
Mono Page*	The cost in pence to print one side in monochrome (black and white).	No
Colour Page*	The cost in pence to print one side in full colour.	No

***NOTE:** The value for each pricing option must be specified in pence.

EXAMPLE:

- 48 is 0.48 pence
- 48.55 is 0.4855 pence

Licensing

To use the functionality of Xerox Hybrid Mail Service and to enable optional modules, a licence must be applied.

Following purchase and provision of a Xerox Hybrid Mail Service licence key, click the System Admin menu (Fig. 4) then the Licence option. Following this, the Licence page (Fig. 97) is opened where licence details appear and the licence key can be specified and applied.



Fig. 97 Licence page

To license Xerox Hybrid Mail Service, perform the following actions on the Licence page:

1. Type or paste the Xerox Hybrid Mail Service licence key in the Licence Key edit box (Fig. 9).
2. Click the Validate button in the side panel (Fig. 5). If validation is successful you are notified.

Database Management

The web interface does not contain database management facilities. It is therefore vital you implement your own software and procedures for creating backups of the database, restoring it, and rebuilding indexes.

The database used by Xerox Hybrid Mail Service is Microsoft SQL Server.

Appendix A – CSV File

In this section the following information is included:

- File Format
 - Content Structure
 - Email
 - Dealing with Spaces
 - Dealing with Commas
-

File Format

CSV files must be ASCII text and have a CSV extension.

Content Structure

CSV files must conform to the following structure:

- Each row must appear on a separate line
- The first line must be a header row so Xerox Hybrid Mail Service can identify content
- Each column/field must be separated by a comma

EXAMPLE: Header 1, Header 2, Header 3
Content 1, Content 2, Content 3
Content 1, Content 2, Content 3

The header row must contain a column/field labeled Post Code or Postcode. All columns/fields to the left of this must contain recipient contact details such as name and county. All columns to the right can contain variable data.

EXAMPLE: Name, Address 1, Town/City, County, Post Code, Data 1, Data 2
Mr A Smith, 56 Birch Grove, Taunton, Somerset, TA1 1GH, AS123, 200.00

The above example would appear in a letter as follows:

Mr A Smith
56 Birch Grove
Taunton
Somerset
TA1 1GH

The variable data – AS123 (Data 1) and 200.00 (Data 2) – would appear wherever their corresponding placeholders appeared in the letter.

Email

If mail needs to be sent to a recipient's email address then the header row of the CSV must contain a column/field called MailTo.

EXAMPLE: Name, MailTo, Data 1, Data 2
Mr A Smith, asmith@emailaddress.com, AS123, 200.00

NOTE: The Send Via Email check box on the Compose Mail page (Fig. 51) must be ticked to send mail to email addresses contained in a CSV file.

ATTACHMENTS

If mail pieces require one or more PDF files to be attached then the header row of the CSV must contain a column/field called Attachments, and the file name(s) of the PDF file(s) specified below.

EXAMPLE: Name, Address1, Town/City, County, Post Code, Attachments
Mr A Smith, 56 Birch Grove, Taunton, Somerset, TA1 1GH, SalesLeaflet.pdf

If more than one attachment is required then the file name of each PDF file must be separated by a question mark (?).

EXAMPLE: SalesLeaflet.pdf?WelcomeLeaflet.pdf

Dealing with Spaces

Any number of spaces is permissible in a column/field.

EXAMPLE: Mr A Smith, 56 Birch Grove , Taunton, Somerset, TA1 1GH

Would appear in a letter as follows:

Mr A Smith
56 Birch Grove
Taunton
Somerset
TA1 1GH

If a column/field is enclosed in double quotes, additional spaces are retained.

EXAMPLE: Mr A Smith, "56 Birch Grove", Taunton, Somerset, TA1 1GH

Would appear in a letter as follows:

Mr A Smith
56 Birch Grove
Taunton
Somerset
TA1 1GH

Dealing with Commas

If a column/field contains one or more commas that you would like to appear in a letter, they must be enclosed in double quotes.

EXAMPLE: Mr A Smith, "56, Birch Grove", Taunton, Somerset, TA1 1GH

Would appear in a letter as follows:

Mr A Smith
56, Birch Grove
Taunton
Somerset
TA1 1GH

EXAMPLE: "Mr. A. Smith," "56, Birch Grove," "Taunton," "Somerset," TA1 1GH.

Would appear in a letter as follows:

Mr. A. Smith,
56, Birch Grove,
Taunton,
Somerset,
TA1 1GH.

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