



Automation Scheduler™

System Guide

Version 13, Created April 15, 2020

ABOUT THIS GUIDE

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REVISION HISTORY

This section contains a list of any significant changes that were made from the previously published version of this Guide, including a brief description of the change, the type of change made (i.e. Revision, New, or Deletion), a link to the location in the Guide where the change occurred, and any pertinent details relating to the change.

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Updated sections	Revision	ABOUT THIS GUIDE and throughout document	Updated trademark and copyright information.
Updated section	New	REQUIREMENTS	Updated product version information.
Updated section	Revision	COMPONENT INSTALLATION SEQUENCE	Updated installation sequence based on new, bundled product installers. Also removed 'PPP' from the installation sequence.
Updated section	Revision	DOWNLOAD & INSTALLATION	Updated the information in regard to the service logon credentials.
Added section	New	COMPONENT UPDATE SEQUENCE	Added an update sequence for components as a result of the new, bundled installers.
Updated section	Revision	UPDATING THE AUTOMATION SCHEDULER	Included information about the 'Install or Update PostalWeb Connector' option.
Added section	New	PostalWeb Connector Update	Added instructions for updating the PWC as part of the Automation Scheduler update.
Updated section	Revised	Process Manager Plug-in; specifically, Custom Process	Added a Warning note about the timing of setting up a custom process involving the MDSuppAsst utility (included with step 1 of the procedure).
Updated sections	Revision	Throughout document	Updated screen images and corrected typos.

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BEFORE YOU BEGIN

SYMBOLS YOU SHOULD KNOW

The following symbols appear throughout this document:



Where displayed, this Information icon denotes important information regarding the subject matter at hand. The information is intended to provide helpful hints, references to other locations in the document to help further understanding about the current subject-matter, and/or include special requirements pertaining to specific subject-matter. It is important that the information provided be read and thoroughly understood before proceeding.



Where displayed, this Attention icon is intended to make the reader take special notice as the information provided is critical in nature to the subject matter at hand. It is not intended to lessen the importance of the information provided with the Information icon noted above; but to bring additional attention in situations of extreme necessity.



Where displayed, this Troubleshooting icon denotes helpful hints and tips for the subject matter at hand. The information in the troubleshooting tip is intended to provide resolutions for some of the more common issues that can occur during operation.

PURPOSE

The purpose of this System Guide is to provide installation and operating instructions for the Automation Scheduler, along with instructions on how to perform software updates. In addition, this System Guide provides setup and configuration instructions for all of the available plug-ins that the Automation Scheduler runs.

INTRODUCTION

The Automation Scheduler runs a Windows® service and should be installed on the computer that acts as the server for installed Window Book software applications. It operates whenever the computer is running, regardless whether any user is logged in, and runs plug-ins that consist of functions that are specific to various Window Book software applications. It consists of a configuration wizard that allows users to schedule and set up configurations for the available plug-ins. Installed plug-ins are listed vertically along the left side of the main or home screen.

Before You Begin

A registration key is required to install and run the Automation Scheduler. The registration key dictates which plug-ins can be configured for use by the Client. [Contact your local Window Book Client Services Representative](#) for more information. The registration key should be obtained before attempting to install the Automation Scheduler and any associated plug-ins.



Additional plug-ins can be installed at any time after the initial installation of the Automation Scheduler; however, a new registration key will be required when this occurs.

REQUIREMENTS

- The Automation Scheduler version 8.20.3.149 (or newer) must be installed and registered.
- A Window Book-generated product registration key is required (contact [Window Book Client Services Team](#)). The registration key should be obtained before attempting to install the Automation Scheduler and the associated plug-in(s).
- The Automation Scheduler installation wizard will automatically install MS SQL Express 2016 or newer for the user if the option is selected during the installation process. With MS SQL Server 2016 and newer, Microsoft no longer packages the SQL Server Management Studio along with MS SQL Server; therefore, it is no longer automatically installed during the installation. The Client will have to install SQL Server Management Studio separately on the server where MS SQL Server (or MS SQL Server Express) is installed after the installation of the Automation Scheduler is complete. A link to the SQL Server Management Studio is available on the [Automation Scheduler Software Downloads page](#) of Window Book's web site.
- The server (or computer in a stand-alone environment) the Automation Scheduler is installed on must be properly synchronized to the atomic time, preferably with a 'time server'. Failure of the server or computer to keep the correct time may result in access denied errors if the server or computer's time varies more than 5 minutes (+/-) from the atomic time.
- Window Book's Automation Scheduler must be installed on the server (or computer in a stand-alone environment) where the Window Book software is installed that a specific plug-in coincides with (e.g. if DAT-MAIL is installed on a server, the Automation Scheduler must be installed on that same server). In an operating environment consisting of server(s) with workstation(s), it is only necessary to install the Automation Scheduler on the server(s) and not the workstation(s).
- SERVICE LOG ON PERMISSIONS: The Automation Scheduler installs and uses a service called the 'Window Book Scheduler' service. This service is specific to the Automation Scheduler and requires a service-specific logon, separate from other Window Book software applications to insure proper functionality. In addition, the Window Book DAT-MAIL Database service logon credentials require special permissions pertaining to MS SQL database usage. Necessary permission information is provided in the [Window Book Product Requirements Guide](#).

The Window Book Scheduler service logon credentials should be created prior to the installation of the Automation Scheduler. The user performing the installation will need to have the credentials on-hand at the time of installation.
- SOFTWARE PREREQUISITES: With the exception of PostalWeb, all of Window Book's software applications require certain software prerequisites be installed and functioning on the server

before beginning each Window Book product installation. Refer to [SOFTWARE PREREQUISITES](#) for more information.

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INSTALLATION

! *It is very important that the information provided under [REQUIREMENTS](#) has been read, understood, and any necessary items obtained before beginning the installation process!*

COMPONENT INSTALLATION SEQUENCE

The following installation sequence applies to the server installation (or computer in a single installation environment) and should be followed for the first-time installation of software. The installation sequence for product updates is similar but differs slightly since the inclusion of a new bundled installer option (March 2020). Refer to [UPDATING YOUR SOFTWARE](#) for more information.

i *This same order should be applied if only PostalWeb and/or a sub-set of the applications shown in the table are to be installed. For example, if a Client intends on using only PostalWeb with the PostalWeb Desktop Dashboard and PostalWeb Connector, then, following the table below, the order of registration/installation should be: PostalWeb, PostalWeb Connector, and PostalWeb Desktop Dashboard.*

PostalWeb	Automation Scheduler	PostalWeb Connector	DAT-MAIL (server or standalone)	AWAM	PostalWeb Desktop Dashboard
1	2	3	4	5	6

! *The installation of any Window Book software application(s) on a workstation(s) should occur after the entire server installation (applicable products only) is complete.*

Product Installation Guides

Below are direct links to the installation guides for the products called out in the table above:

[PostalWeb for Mail Service Providers Setup Guide](#);
[DAT-MAIL Installation & Update Guide](#);
[PostalWeb Connector Installation & User Guide](#);
[AWAM Setup Guide](#); and
[PostalWeb Desktop Dashboard Installation & Update Guide](#).

i *All Window Book product documentation (including User Guides) are available from within Window Book's [Support Portal](#). Registration and/or login is required.*

SOFTWARE PREREQUISITES

With the exception of PostalWeb, all of Window Book's software applications require certain software prerequisites be installed and functioning on the server before beginning the Window Book product installation. The preferred reference for these prerequisites is located on each of the software's Downloads page on the Window Book web site at: <http://www.windowbook.com/Support/Downloads>.

When the Client attempts to install a Window Book software application (i.e. launches the installation executable file downloaded from the Window Book web site), the installation wizard will assess the system. If it is determined that one or more of the software prerequisites is not present, a dialog will display at the start of the installation. The dialog will identify exactly which of the prerequisites are missing and will provide the location the missing prerequisites can be obtained from.

Example:



i *The Prerequisites dialog contains information specific to the system the Client is attempting to install that Automation Scheduler on. The above screen image is being used as an example only.*

Using that dialog as reference, the user should then download the necessary prerequisites from the Window Book web site and install them before attempting to install the Window Book software again.

i *Meeting the prerequisite requirements for any Window Book software application installed before the Automation Scheduler, will also satisfy the same prerequisites required by the Automation Scheduler. If, for whatever reason the Automation Scheduler is not the first Window Book software application being installed on the server (not recommended), most likely the software prerequisite requirements for it will already have been met and prerequisite dialog will not display during installation.*

DOWNLOAD & INSTALLATION

To download and install Window Book's Automation Scheduler with plug-ins, perform the following:

1. Go to the Window Book web site (www.windowbook.com) and then select the 'Downloads' menu option;



2. The *Software Downloads* page will display. Click on the 'Window Book Automation Scheduler' download;

i *The version information for the Automation Scheduler depicted in the screen images found in this Guide was current at the time of publishing; however, version information is subject to change as new product releases occur. Window Book's web site may not reflect the version number displayed in this Guide.*

Current Product Versions				
DAT-MAIL MS-SQL™ Version: 21.20.12.19 Updated: 03/03/2020	Postal Package Partner MSSQL™ Version: 11.19.09.02 Updated: 01/08/2020	DAT-MAIL Prep™ Version: 8.20.14.174 Updated: 03/03/2020	PostalWeb Desktop Dashboard™ Version: 10.20.20.213 Updated: 03/03/2020	PostalWeb Connector™ Version: 8.20.20.223 Updated: 03/10/2020
DAT-PreCheck™ Version: 8.20.13.71 Updated: 03/03/2020	Window Book Automation Scheduler™ Version: 8.20.3.147 Updated: 03/03/2020	TagMaster™ Version: 10.19.02.01 Updated: 11/21/2019	DropShipIT™ Version: 10.03.03.02 Updated: 11/21/2019	Postal Business Companion™ Version: 20.20.03.01 Updated: 02/14/2020
Complete Postal Library	Destination Database	AWAM File Manager	Enterprise Shipper	TrueAddress

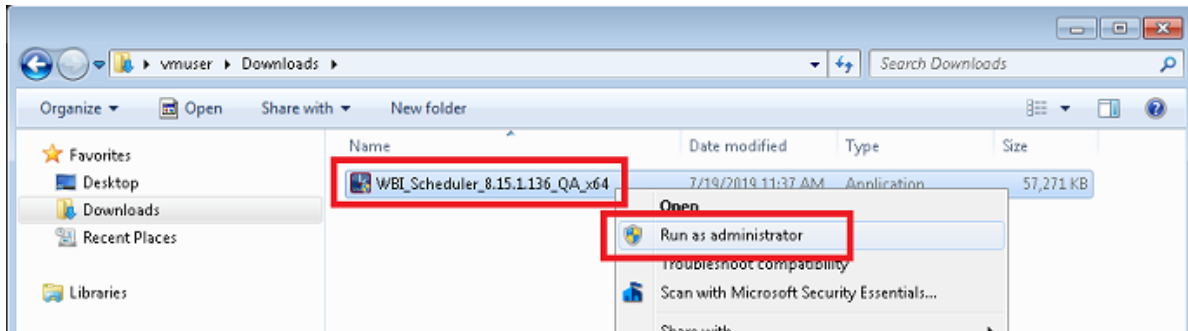
i *To learn about the latest product enhancements, refer to the "What's New?" document that is published with each software release. The document can be viewed by clicking the large, "What's New?" banner located on the '[Software Downloads](#)' page.*



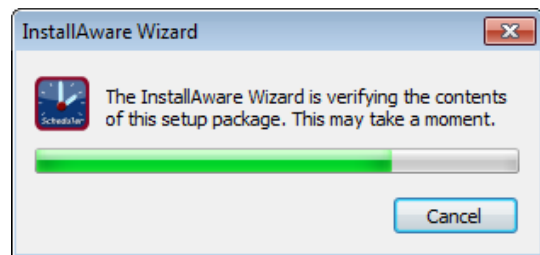
3. The *Window Book Automation Scheduler Software Update* page will display. Download the installation file;

Installation

- When the download is complete, navigate to the downloaded file on the computer or server using Windows Explorer, right-click on the file and select 'Run as administrator';

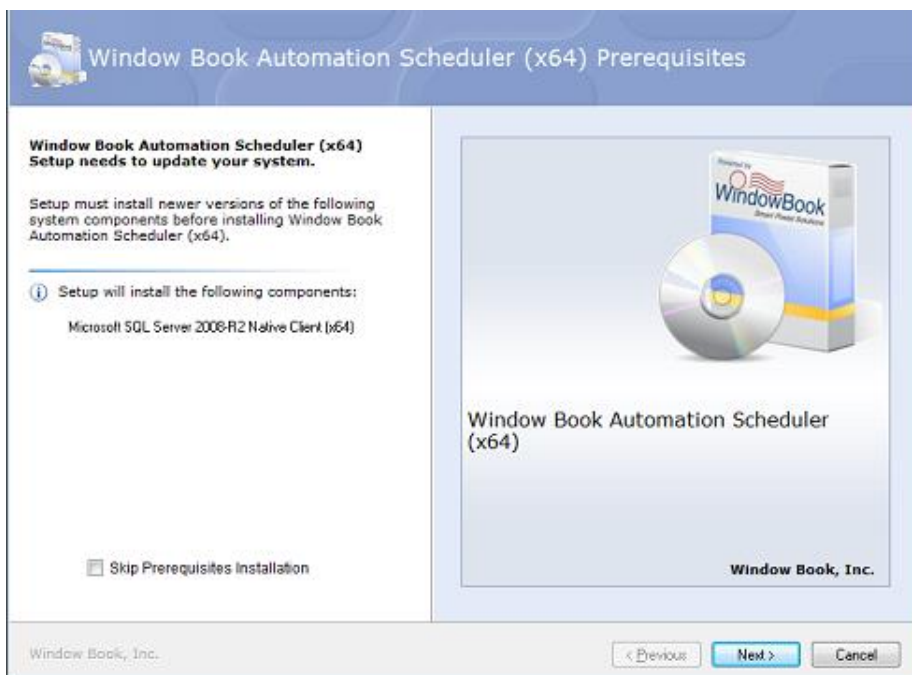


- The Window Book InstallAware Wizard will begin to run some automatic system checks;

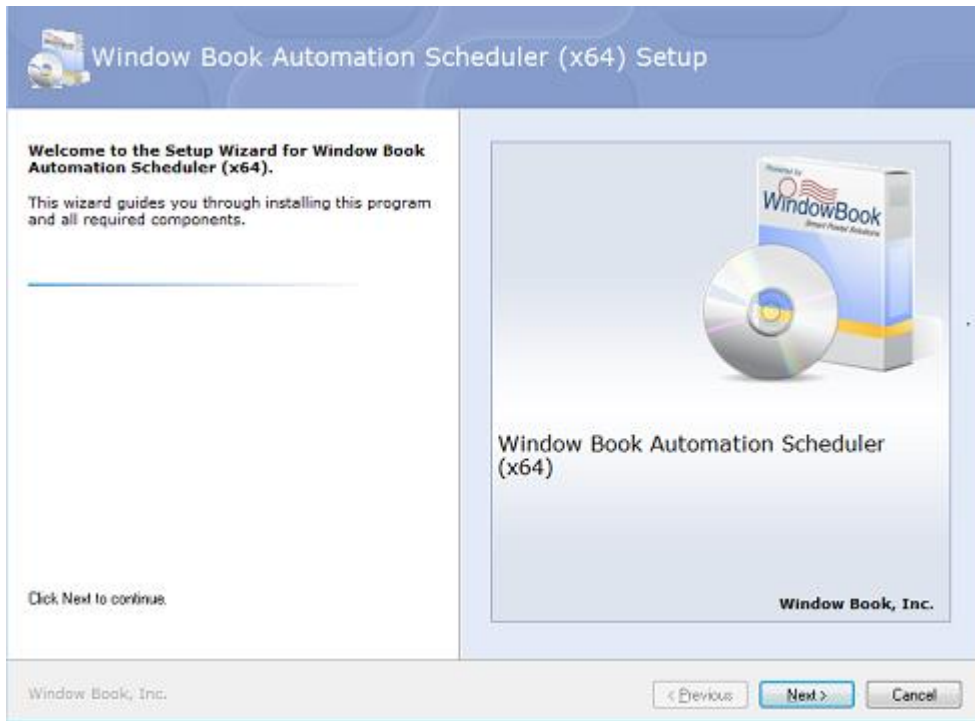


If a Prerequisites dialog displays, download the required prerequisite software (refer to the [SOFTWARE PREREQUISITES](#) section in this Guide for more information).

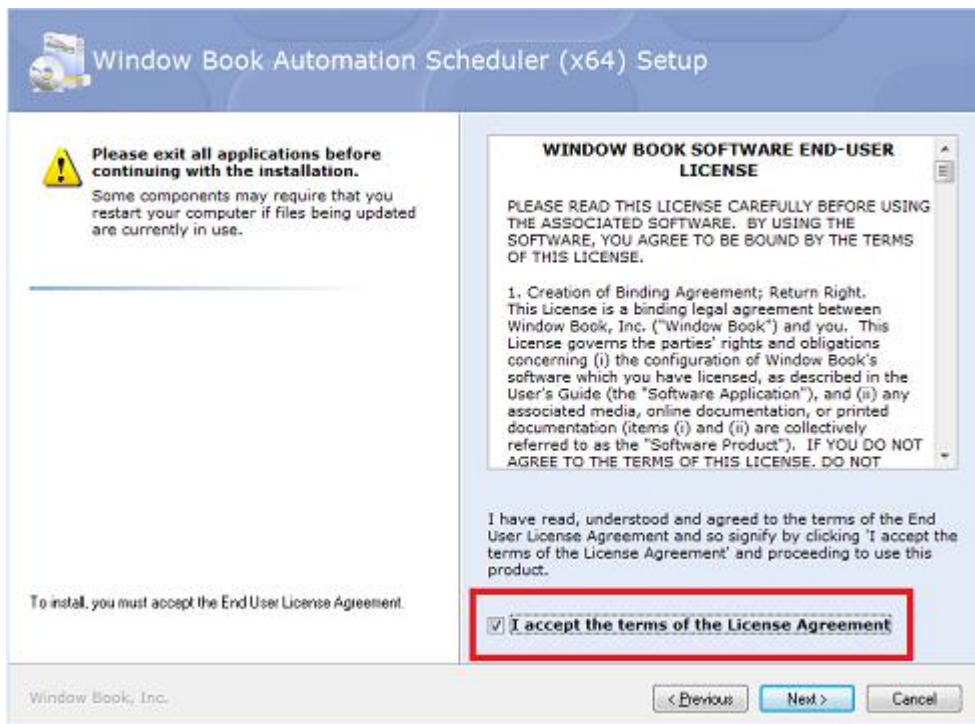
- The InstallAware Wizard will begin by installing the necessary Native Client files for connectivity to Microsoft SQL Server. Click the **Next** button to continue;



7. The interactive InstallAware wizard is ready to begin the installation process. Click the **Next** button to continue;

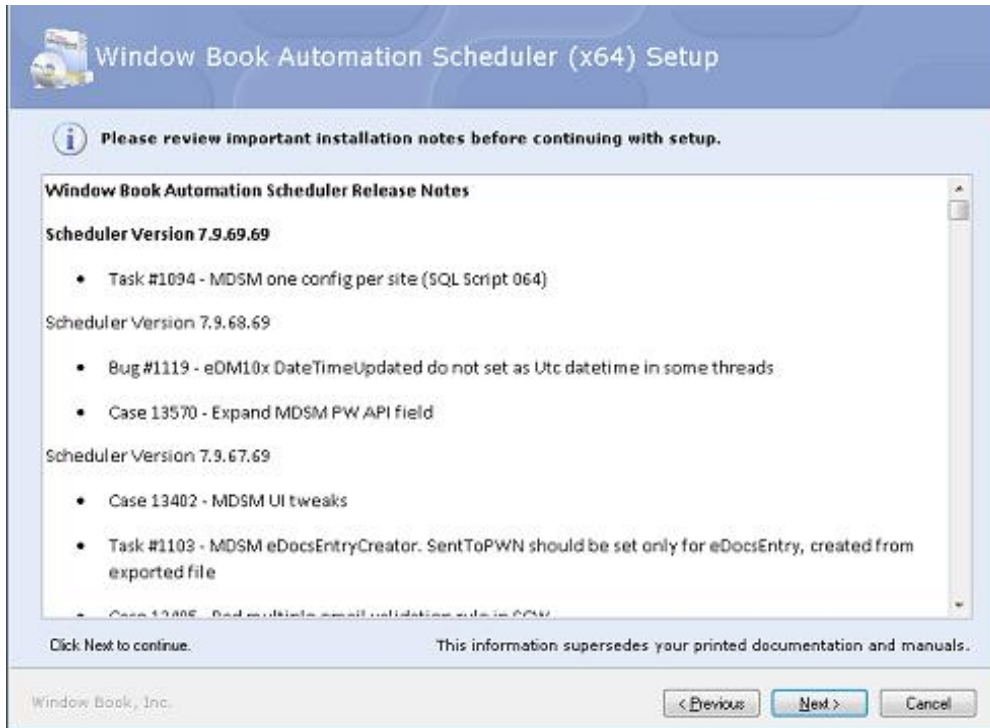


8. Close any open software applications and accept the terms of the license agreement. Click the **Next** button to continue;

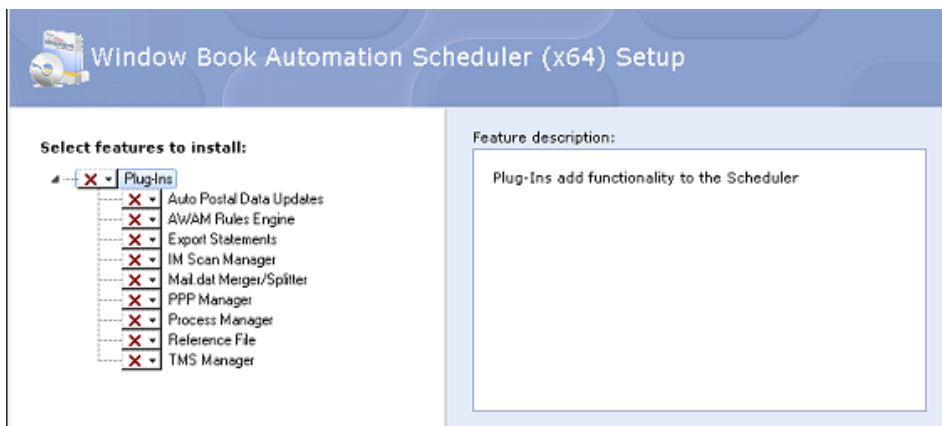


Installation

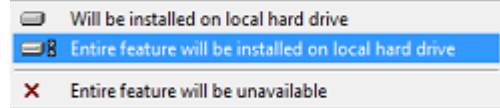
- The next screen will display important Release Notes. After reviewing, click the **Next** button to continue;



- The InstallAware Wizard will then list the available plug-ins that can be installed. Click the drop-down arrow next to the red 'X' for each individual plug-in(s) to be installed.

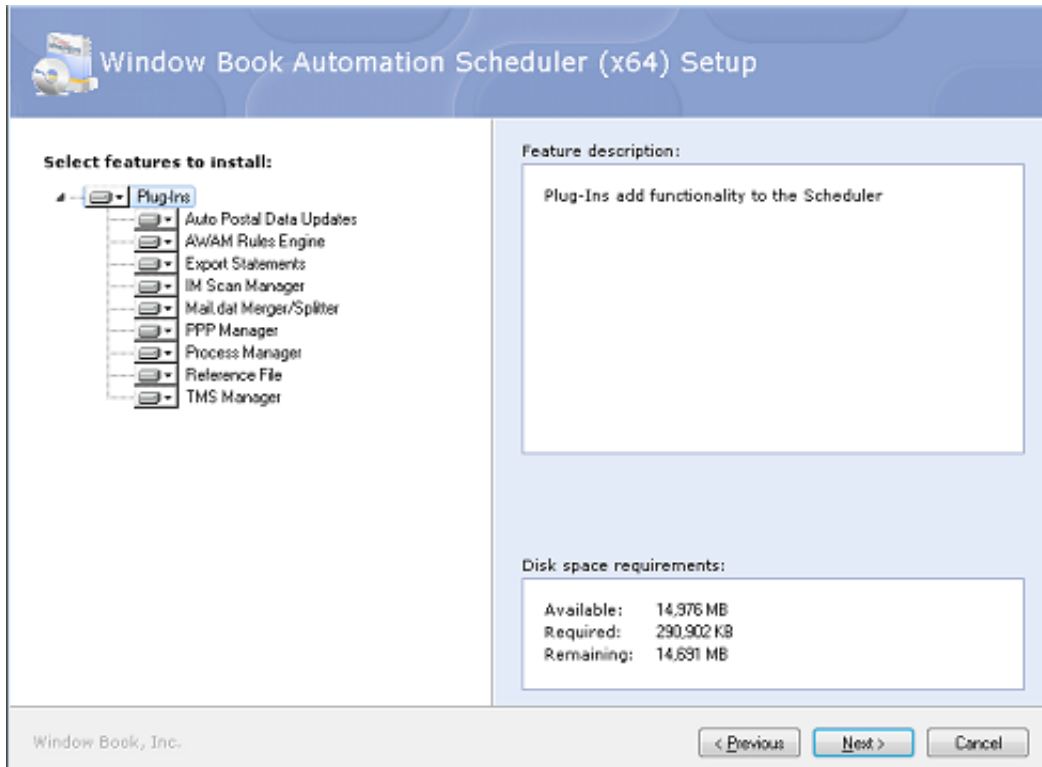


Select the option: 'Will be installed on local hard drive'; or 'Entire feature will be installed on the local hard drive' (either will work);



In the example being used here, all of the plug-ins are being installed.

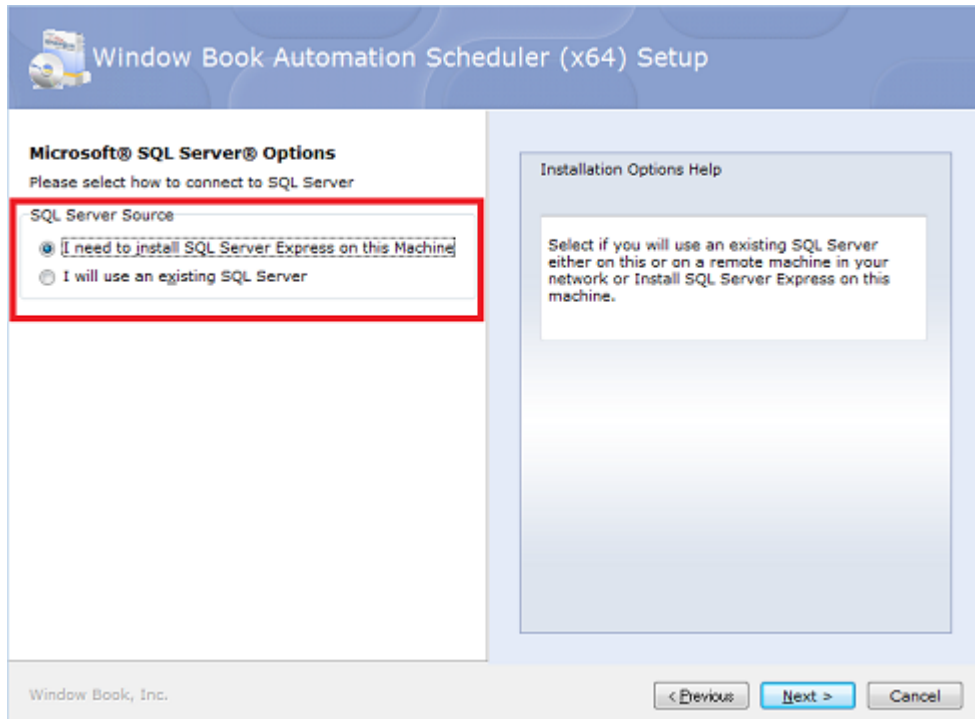
i Only install those plug-ins that the registration key received by Window Book applies to. [Contact your local Window Book sales representative](#) for more information about registration keys.



Click the **Next** button to continue;

Installation

11. The *Microsoft SQL Server Options* screen will display. Users can opt to install MS SQL Express for use with the Automation Scheduler or opt to use an existing instance of MS SQL Server.



- If the option 'I need to install SQL Server Express on this Machine' is selected, click the **Next** button to continue and proceed to [Step12](#) in this procedure.

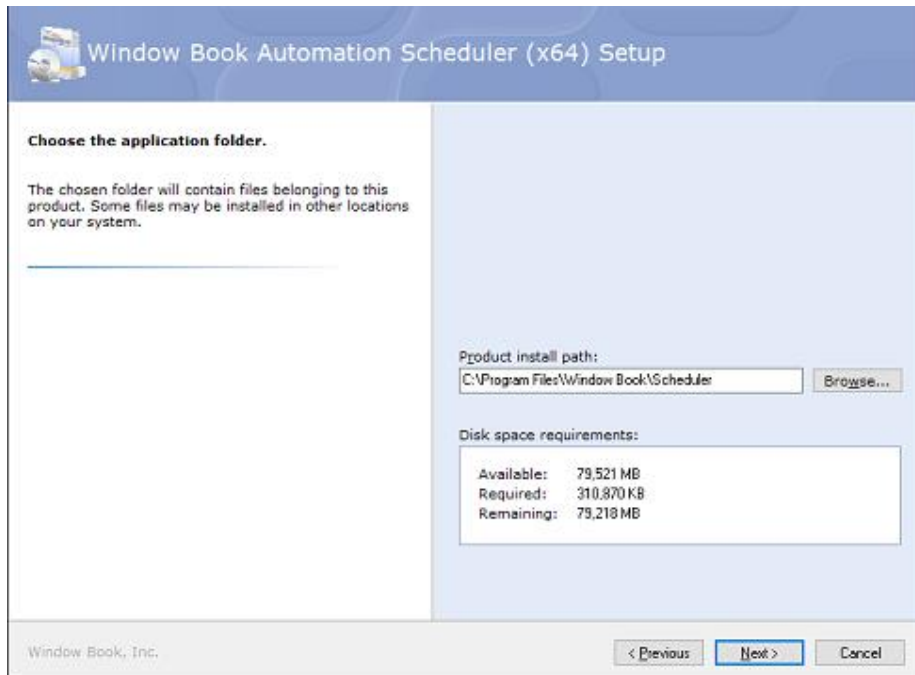
i *The Automation Scheduler installation wizard will automatically install MS SQL Express 2016 or newer for the user if the option is selected during the installation process. With MS SQL Server 2016 and newer, Microsoft no longer packages the SQL Server Management Studio along with MS SQL Server; therefore, it is no longer automatically installed during the software installation. The Client will have to install SQL Server Management Studio separately on the server where MS SQL Server (or MS SQL Server Express) is installed after the installation of the Automation Scheduler is complete. A link to the SQL Server Management Studio is available on the [Automation Scheduler Software Downloads page](#) of Window Book's web site.*

- If the option 'I will use an existing SQL Server' is selected, the installation wizard will prompt the user to browse and select an existing SQL Server from a provided list.

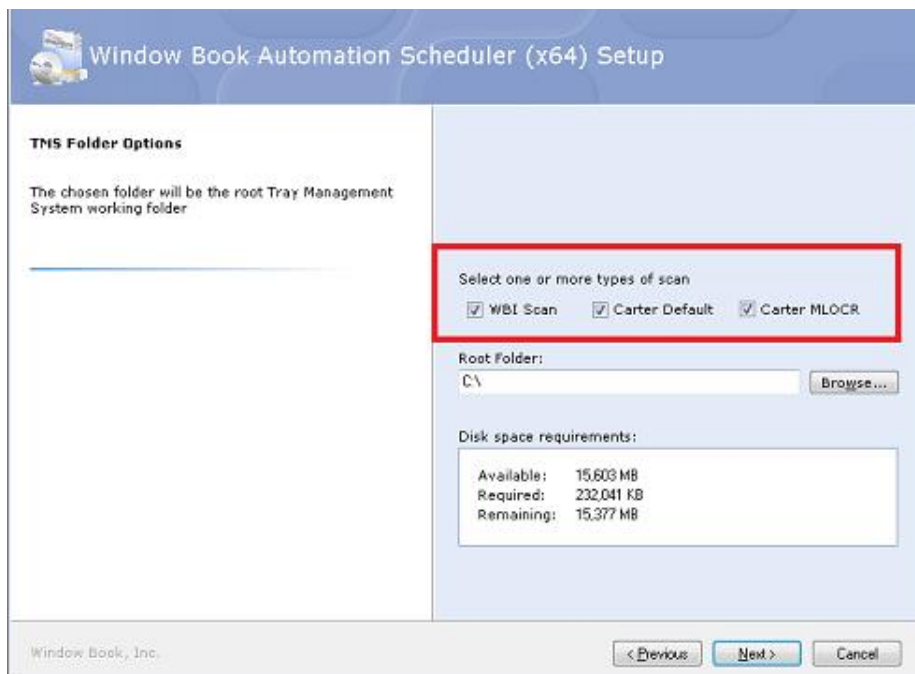
i *If the SQL instance is not displayed in the provided list, the user can type the instance in the field and attempt a connection to it. Follow the instructions on the screen.*

When a connection to the existing SQL Server instance is confirmed, click the **Next** button to continue and proceed to [step 12](#) in this procedure;

12. The *Choose Application Folder* screen will display. Window Book strongly recommends using the default path/folder provided; however, the user can select a different folder by clicking the **Browse...** button. Click the **Next** button to continue;



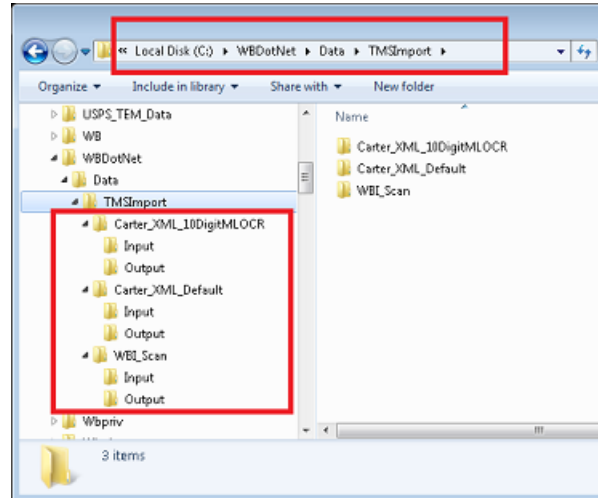
13. If the 'TMS Manager' plug-in was selected for installation (refer to [step 10](#) above), the *TMS Folder options* screen will display (if the 'TMS Manager' plug-in was not selected for installation, proceed to [step 14](#) in this procedure).



This screen allows the user to specify the scan type that will be used in order to automatically create the data folders for those scans. The default scan type is 'WBI Scan'; however, the user can also select two or all three of the options if the scan type is unknown at the time the Automation Scheduler is being installed.

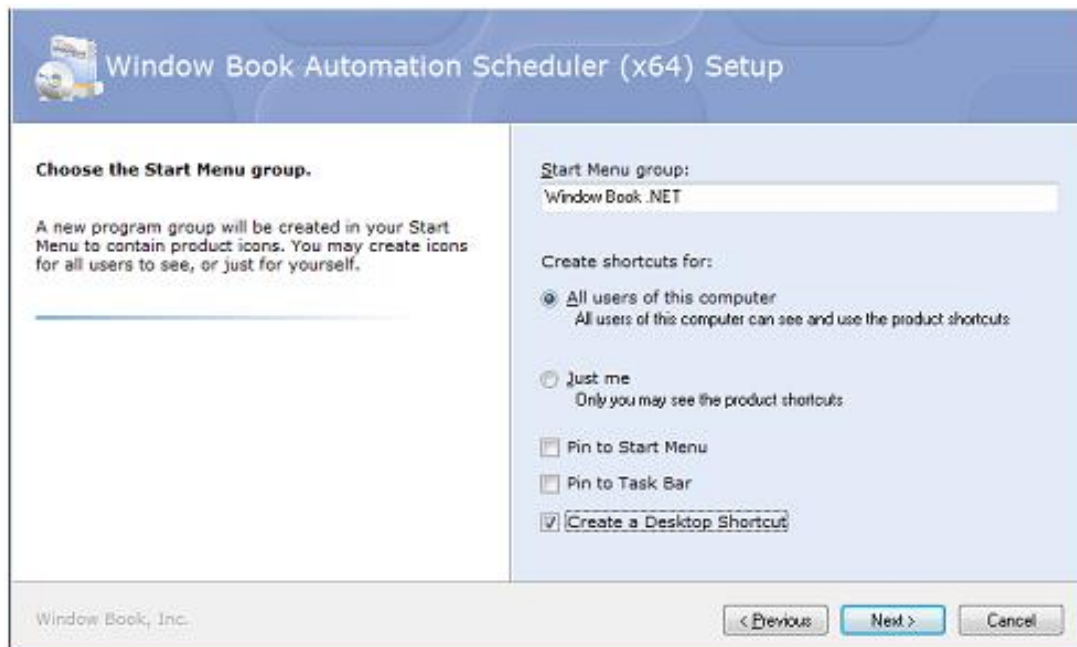
Installation

i When the installation of the Automation Scheduler completes, the input and output data folders for each of the scan types enabled in the TMS Folder Options InstallAware screen (see above) will be automatically created under the 'WBDotNet' directory on the computer or server.



Click the **Next** button to continue;

14. The next screen will ask to have the 'Start Menu Group' specified along with some other options to be enabled after the installation is complete. Leave the Start Menu Group as the default and enable any of the other options as needed (e.g. enable 'Create a Desktop Shortcut'). When ready, click the **Next** button to continue;



15. The *Logon Information* screen will display. Window Book strongly recommends NOT selecting (checking) the option to 'Start Service After Install'.

wrench Depending on the server or computer's settings, errors may occur during installation that result in the installation not completing successfully if the option to 'Start Service After Install' is selected (checked).



Additional information is provided for starting the service the first time at the end of this 'Download and Installation' procedure.

Windows Service Logon Information:

The 'Computer/Domain Name' will default to the name of the computer or server that the Automation Scheduler is being installed on.

The Automation Scheduler installs and uses a service called the 'Window Book Scheduler' service. This service is specific to the Automation Scheduler and requires a service-specific logon, separate from other Window Book software applications to insure proper functionality (refer to [REQUIREMENTS](#) for more information).

The 'Username' will default to the login ID that was used to log onto that same computer. Change the Username and enter the Password that are to be used for the Automation Scheduler service. Click the **Next** button to continue;

Window Book Automation Scheduler (x64) Setup

Logon Information
The following logon information is used by Window Book Automation Scheduler (x64)

Start Service After Install

Windows Service Logon Information

Computer/Domain Name:
WINDOWBOOK

Username:
vmuser

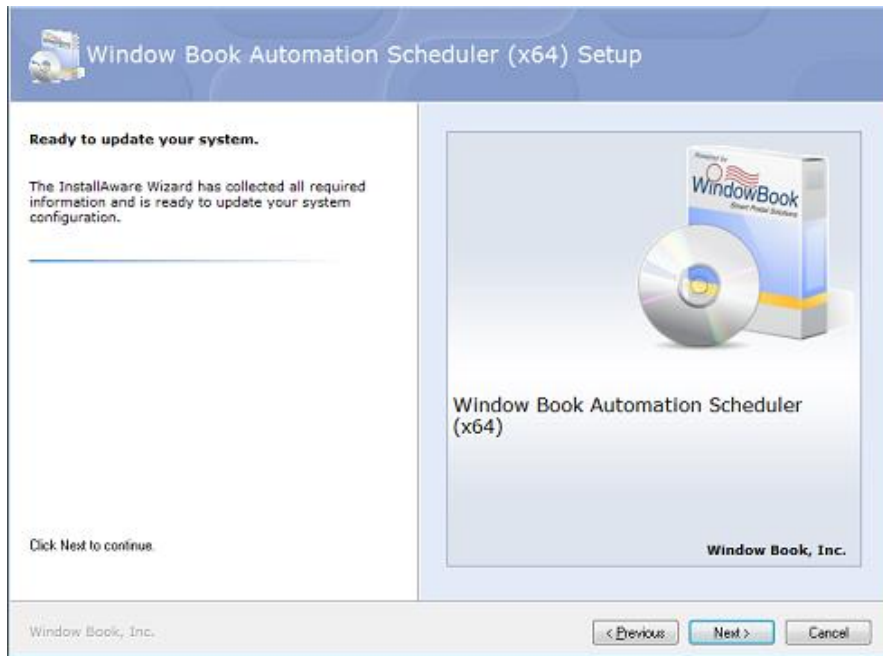
Password:

Logon Information Help:
Specify a user account to be used by the application, either for running a service or for logging onto other servers.
The account used must have permission to access remote resources which the service will use
Resources can be shared drives, mapped drives, servers such as database servers

Window Book, Inc. < Previous Next > Cancel

Installation

16. The *Ready to update your system* screen will display. Click the **Next** button to continue;

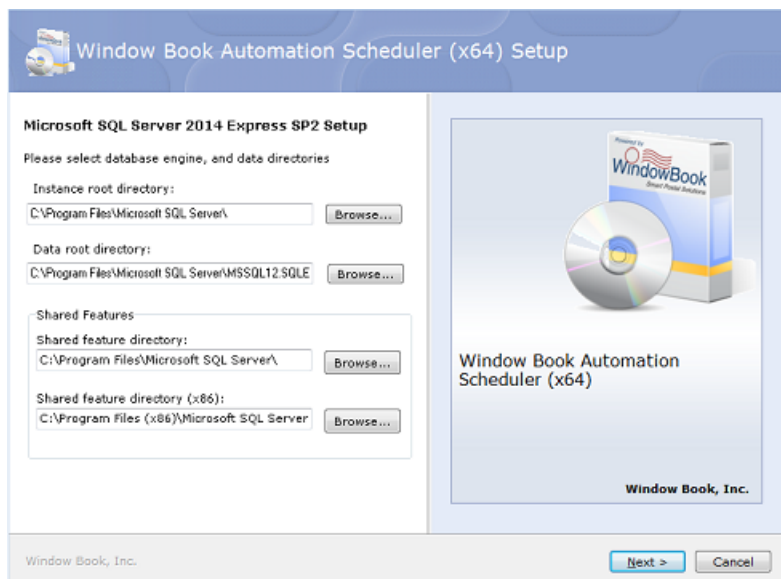


17. If the option to install SQL Server Express was selected earlier (refer to [step 11](#) in this procedure), the *Microsoft SQL Server 20XX Express Setup* screen will display.



The version of SQL Server Express that displays on the screen and that is installed depends on the operating system it is being installed on.

If the option to use an existing instance of SQL Server Express was selected, proceed to [step 18](#) in this procedure.



The *Microsoft SQL Server 20XX Express Setup* screen displays the location where the SQL Server software and its components will be installed.

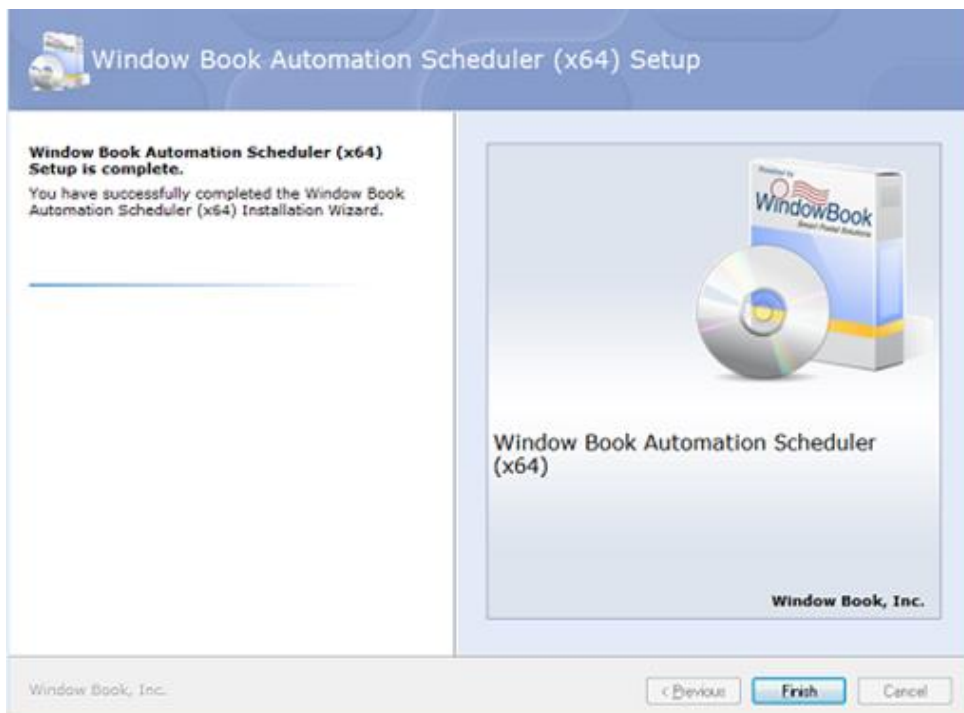
Window Book strongly recommends using the defaults provided; however, the user can select different locations/directories by clicking the corresponding **Browse...** button. When ready, click the **Next** button to continue;

18. The InstallAware Wizard will begin updating your system. If installing MS SQL Server Express, this will take a few minutes;

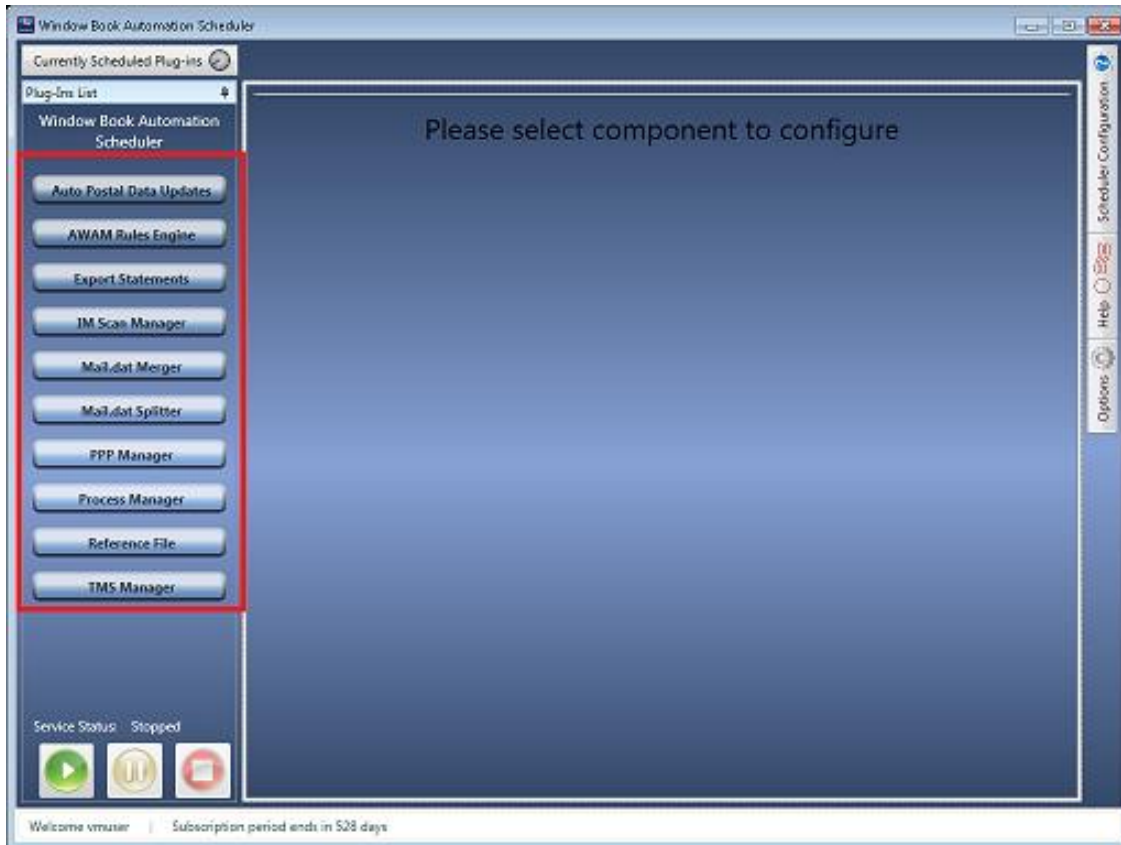
During the installation process, an MS SQL Management Studio – Information dialog will display. This dialog informs the user that if they are using MS SQL Server 2016 or newer (e.g. in this case, 2017 was installed), they will need to install the Microsoft SQL Server Management Studio (SSMS) software separately after the Automation Scheduler installation completes. Microsoft no longer includes SSMS with the installation of their SQL Server software (version 2016 and newer). Click the **OK** button to close the dialog and continue the installation.



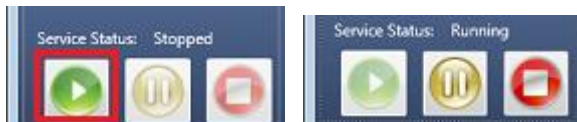
When the installation completes, select (check) the option to 'Run Window Book Automation Scheduler...', and click the **Finish** button. The InstallAware Wizard will close.



21. The Automation Scheduler's main screen will display. Installed plug-ins enabled through the registration key will display in the menu to the left. Confirm that the plug-in(s) selected during the installation is listed (in this example, all of the available plug-ins were selected, so all are listed);



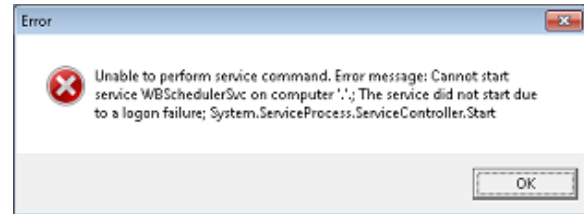
! *At this time, before attempting the installation of any other Window Book product's, the Scheduler's service must be started and run for a few moments. Refer to [Starting the Service - REQUIRED](#) for more information.*



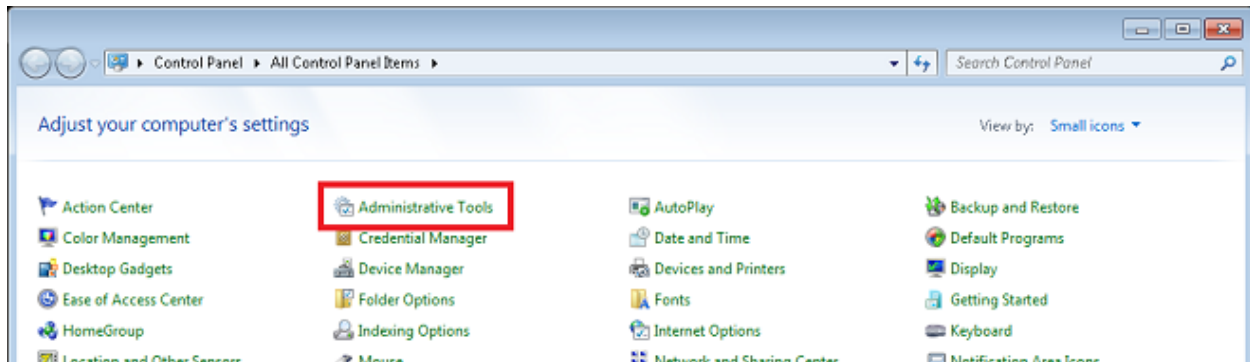
Installation

Starting the Service - REQUIRED

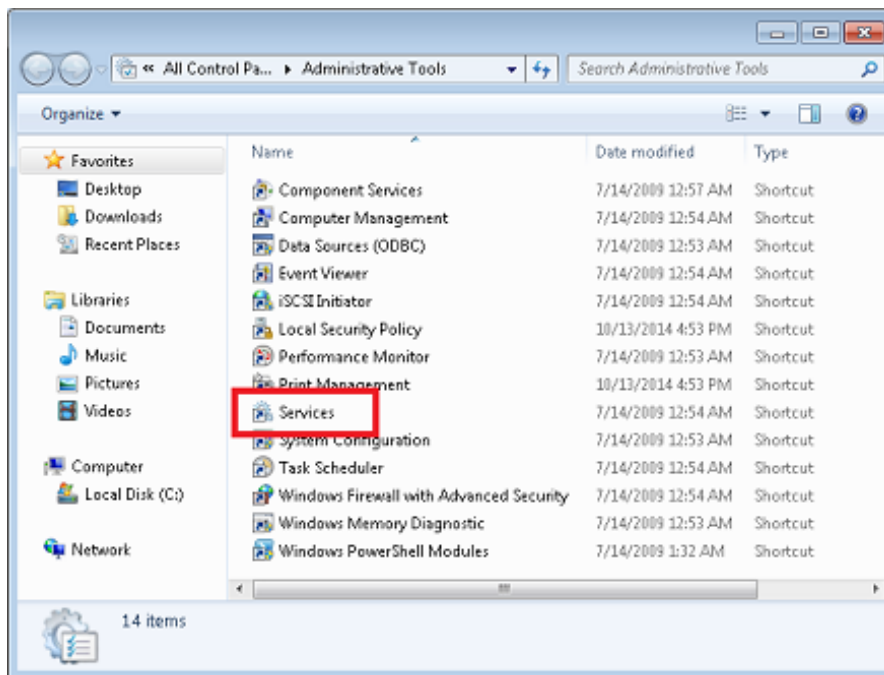
At this point, if during the installation the option to 'Start Service After Install' was not selected (recommended) – refer to [step 15](#) above, the service will be stopped. Attempting to start the service may result in the following error. Click the **OK** button to resolve the *Error* dialog;



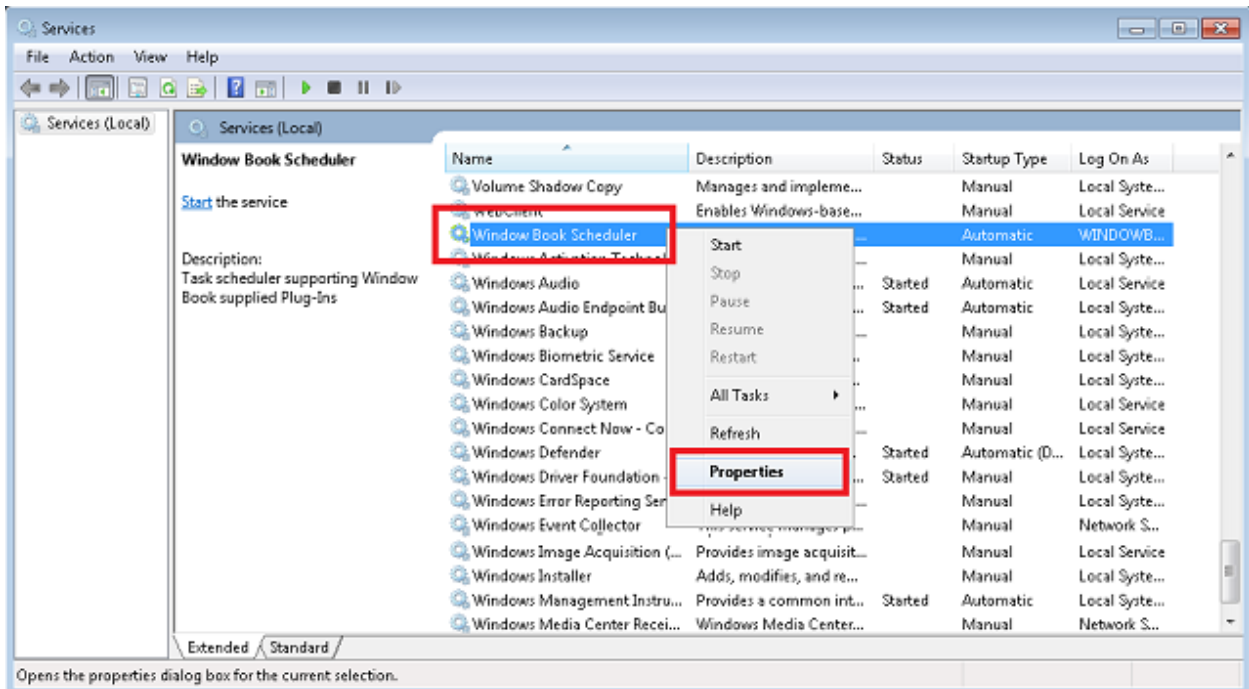
1. On the server or computer where the Automation Scheduler is installed, launch the 'Control Panel'. Select (i.e. 'Administrative Tools');



2. The *Administrative Tools* window will display. Double click on 'Services';



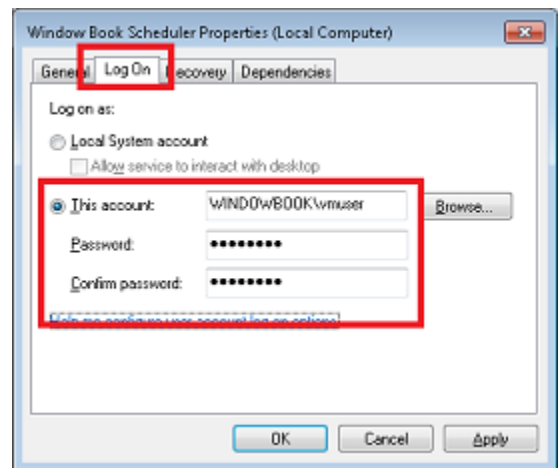
3. The *Services* window will display (this may take a few moments). Scroll down the list of services to the 'Window Book Scheduler' service. Right-click on the 'Window Book Scheduler' service and select 'Properties';



4. The *Window Book Scheduler Properties* dialog will display. Select (click) the 'LogOn' tab;

Confirm that the computer or domain name and logon name are correct (e.g. "WINDOWBOOK\vmuser"). Re-enter the correct password.

Click the **Apply** button. A *Services* dialog will display confirming that the account has been granted the necessary 'Log On As A Service right'.

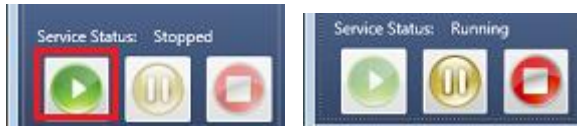


Click the **OK** button to resolve the *Services* dialog.

Click the **OK** button on the *Window Book Scheduler Properties* dialog to close it;

Installation

5. Close all of the Control Panel-related windows;
6. Within the Automation Scheduler, click the **Start** button and confirm the service starts.



The procedure for granting the Log On account the necessary 'Log On As A Service right' only needs to be performed the first time the Automation Scheduler service is started.



With MS SQL Server 2016 and newer, Microsoft no longer packages the SQL Server Management Studio along with MS SQL Server; therefore, it is no longer automatically installed during the software installation. When the installation of the Automation Scheduler is complete, download and install SQL Server Management Studio separately on the server where MS SQL Server Express is installed (if the option 'I need to install SQL Server Express on this machine' was selected – refer to [Step 11](#) in the installation procedure). A link to the SQL Server Management Studio is available on the [Automation Scheduler Software Downloads page](#) of Window Book's web site

UPDATING YOUR SOFTWARE

The version of the Automation Scheduler and available plug-ins should be kept current at all times. Software releases can be downloaded from the 'Downloads' page on the Window Book web site at: <http://www.windowbook.com/Support/Downloads>.

To receive email notifications automatically when Window Book releases a new version of a particular software program, sign-up for Window Book's 'Software Notices' on the Window Book web site ([Software Notices Support Page](#)). Registration is required.

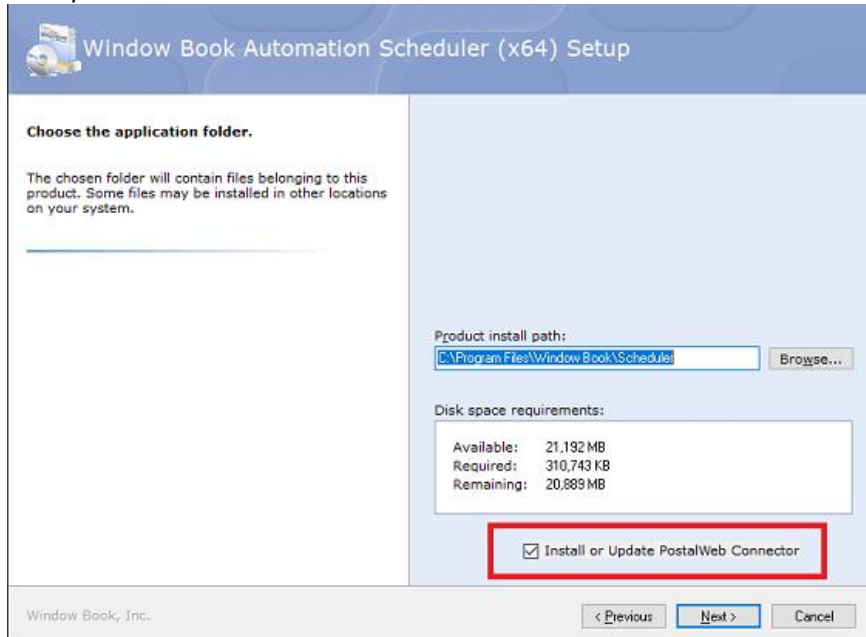
The screenshot displays a support page with a header and a grid of service tiles. The header features the word "Support" on the left, a quote from Monica Lundquist, and her photo on the right. The grid contains the following tiles:

- Contact Support:** E-Mail or Phone our Support team... (includes icons for phone, email, and social media).
- Support Portal:** Go to our Support Portal (includes an icon of a person at a laptop).
- FAQ:** Find answers quickly... (includes an "FAQ" icon).
- Schedule a session:** Schedule a on-line session with our Support team... (includes a "LogMeIn Rescue" logo).
- Software Downloads:** Get the latest updates for your Window Book Products (includes a download icon).
- Software Notices:** Get Notified when software updates are released. (includes an email icon and a "Login Required" label). This tile is highlighted with a red border.
- User Guides:** Product User Guides, for registered users (requires user to login). (includes a "Login Required" label and an icon of a smartphone and books).
- Support Testimonials:** Find out what others are saying about our Window Book Support Team. (includes a "Client Testimonials" icon).
- Support Options:** Inquire about our 24/7 or other support options... (includes an icon of a person with a plus and minus sign).
- Software Training:** Our training services will help you better utilize our products making you more profitable! (includes an icon of a laptop and a box).
- USPS Resources:** Find what you need for utilizing the USPS in your organization. (includes a "U.S. MAIL" logo).

COMPONENT UPDATE SEQUENCE

As part of the installation procedure for product updates, both the Automation Scheduler and DAT-MAIL installers include the ability to install a secondary Window Book product. When installing an Automation Scheduler update, an option is included to also install the PostalWeb Connector update, and when installing a DAT-MAIL update, an option to install the PostalWeb Desktop Dashboard update is also included.

Example:



The following installation sequence for product updates applies to the server installation (or computer in a single installation environment). It is specific to product updates only (i.e. not new or first-time installations).

i *Instructions for a new or first-time installation of the Automation Scheduler are provided under [INSTALLATION](#).*

Automation Scheduler (1a) & PostalWeb Connector (1b)	DAT-MAIL (2a) (server or standalone) & PostalWeb Desktop Dashboard¹ (2b)	All Other Window Book Products
1a then 1b	2a then 2b	3...

! *The installation of any Window Book software application updates on a workstation(s) should occur after the entire server installation is complete.*

Using the options to install either the PostalWeb Connector or PostalWeb Desktop Dashboard is not required. Users can opt out of using these options by simply un-checking them or not checking them during the update to the Automation Scheduler and/or DAT-MAIL. Product-specific update executable files are still provided from the [Downloads page on Window Book's web site](#).

In the event the bundled options are not used or enabled, the installation sequence for the server remains the same, but is performed using each product's individual update executable file.

Automation Scheduler	PostalWeb Connector	DAT-MAIL (server or standalone)	PostalWeb Desktop Dashboard	All other Window Book products
1	2	3	4	5...

UPDATING THE AUTOMATION SCHEDULER

No manual un-install of an existing instance of the Automation Scheduler with plug-in(s) is necessary before performing a download and installation of an updated version. During the update process, the interactive installation wizard automatically un-installs the existing installation. **It is necessary; however, to launch the Automation Scheduler, stop the service, and close the Automation Scheduler before beginning the installation of the updated version.**

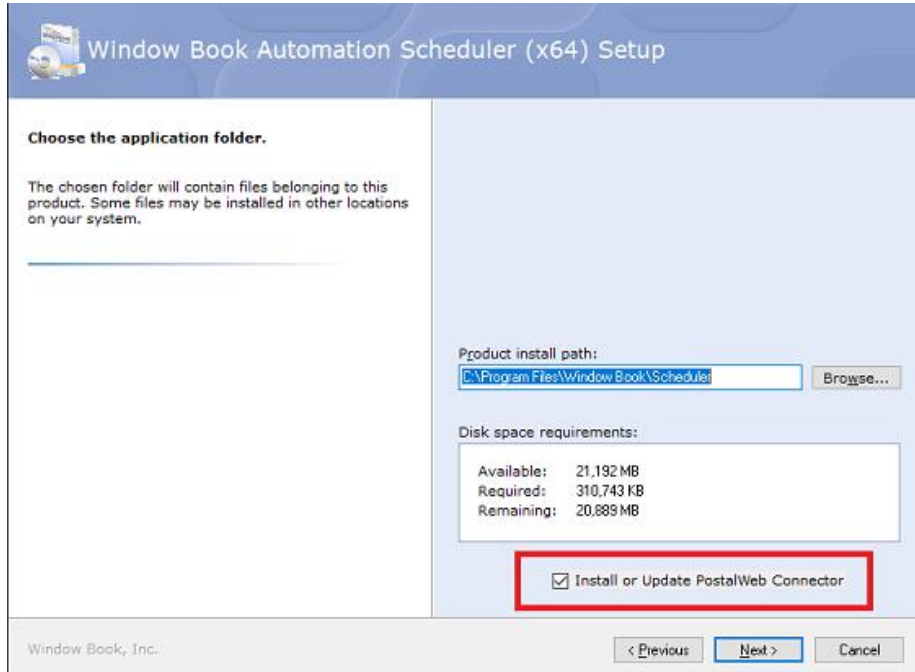
The download and installation of the Automation Scheduler with plug-in(s) updates perform in the same manner as the initial installation of the software. All existing configurations and/or settings will carry over to the updated version. Any plug-ins that were previously installed will automatically be selected during the update process requiring no action by the user; however, if an additional or new plug-in(s) is being installed, it will have to be selected by the user during the update process. The InstallAware screen will display the plug-in list with the previously installed plug-in(s) selected, at which time the user will need to select any additional or new plug-in(s) for installation.

i ***If additional or new plug-ins are being installed during an update to the Automation Scheduler, a new registration key will be required. [Contact your local Window Book Client Services Representative](#) for more information.***

If the Client also has Window Book's PostalWeb Connector software installed, they can automatically update their PostalWeb Connector software to the latest version by selecting (i.e. checking) the 'Install or Update PostalWeb Connector' option that is provided during the update to their Automation Scheduler software.

i ***The option to update PostalWeb Connector only displays if the Automation Scheduler installer detects an existing instance of the PostalWeb Connector.***

Updating Your Software



The first time an update installation of Automation Scheduler that includes this option is run, the option will automatically be checked. Users can un-check it if they do not want to automatically launch the PostalWeb Connector update installation after the installation of the Automation Scheduler completes.

i *Users should know that the checkbox for selecting the option to 'Install PostalWeb Connector' is sticky. If at any point it is unchecked, the next time an update to Automation Scheduler is run, it will automatically be unchecked, and vice versa.*

i *For more information about updating PostalWeb Connector from within the Automation Scheduler, refer to [PostalWeb Connector Update](#) in this Guide.*

When the software update installation finishes (Automation Scheduler only and/or Automation Scheduler and PostalWeb Connector), the Automation Scheduler application will automatically launch. **At this time, the Automation Scheduler's service must be started and run for a few moments and then stopped before any other Window Book product software updates can occur (e.g. DAT-MAIL).** After all Window Book product software updates are completed, the Automation Scheduler's service can be started and left running.

! *Failing to start/run the Automation Scheduler service for a few moments after the update installation completes can result in potential operational issues for other Window Book products!*

If the upgraded Automation Scheduler software contains new functionality that is visible to the user, additional setup and/or configuration steps may be necessary after the installation is complete. If additional setup and/or configuration steps are required, further documentation will be provided.

PostalWeb Connector Update

Once the option to 'Install or Update PostalWeb Connector' is selected, steps for the updating the software actually begin during the update of the Automation Scheduler. To update the PostalWeb Connector software along with the Automation Scheduler, perform the following:

1. During the update procedure for the Automation Scheduler, the *Logon Information* screen will display.



Depending on the server or computer's settings, errors may occur during installation that result in the installation not completing successfully if the option to 'Start Service After Install' is selected (checked). Do NOT select the option to start the service after install!

Users are then required to enter service credentials for running the Automation Scheduler service (i.e. "Window Book Scheduler").

The 'Computer/Domain Name' will default to the name of the computer or server that the Automation Scheduler is being installed on.

The "Window Book Scheduler" service is specific to the Automation Scheduler and requires a service-specific logon, separate from other Window Book software applications to insure proper functionality (refer to [REQUIREMENTS](#) for more information).

The 'Username' will default to the login ID that was used to log onto that same computer. Change the Username and enter the Password that are to be used for the Automation Scheduler service. Click the **Next** button to continue;

Window Book Automation Scheduler (x64) Setup

Logon Information
The following logon information is used by Window Book Automation Scheduler (x64)
 ~~Start Service After Install~~

Windows Service Logon Information

Computer/Domain Name:
LBW7x64Svr

Username:
vmuser

Password:
|

Logon Information Help:
Specify a user account to be used by the application, either for running a service or for logging onto other servers.
The account used must have permission to access remote resources which the service will use
Resources can be shared drives, mapped drives, servers such as database servers

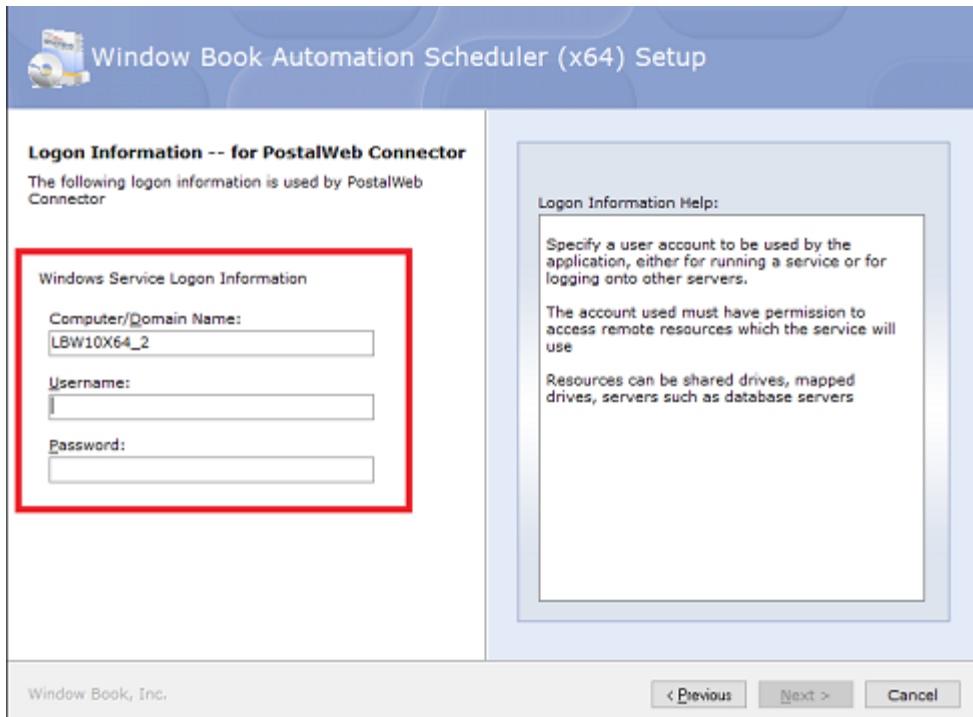
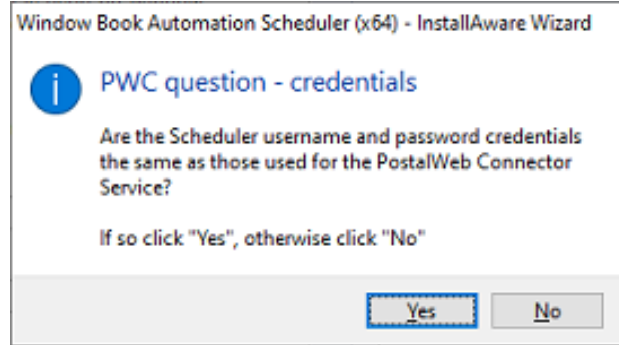
Window Book, Inc. < Previous Next > Cancel

Updating Your Software

- After the credentials are entered and the **Next** button is clicked, a dialog will display asking the user if these same credentials are to also be used for the PostalWeb Connector Service (i.e. “Window Book PostalWeb Connector”).

If the **Yes** button is clicked, the same service credentials entered for the Automation Scheduler will be auto populated for use with the PostalWeb Connector’s service, and the Automation Scheduler update procedure will proceed.

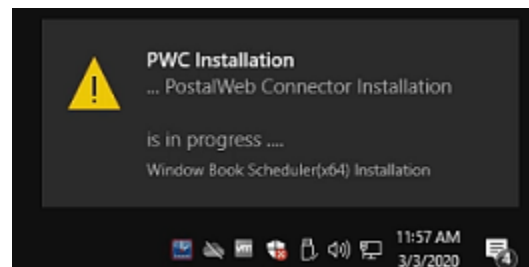
Window Book strongly recommends creating/using service-specific credentials for each Window Book product to insure proper functionality.



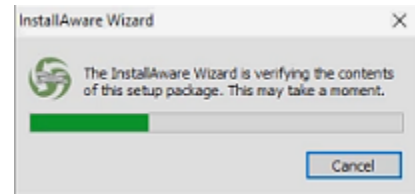
Clicking the **No** button will display a *Logon Information* screen requiring the user to enter PostalWeb Connector-specific service credentials.

- Once the credentials for the PostalWeb Connector service are entered, and the **Next** button is clicked, the Automation Scheduler update will proceed. Once the update finishes, after a few moments, the PWC Installation will launch.

A notification will display in the server’s system tray...

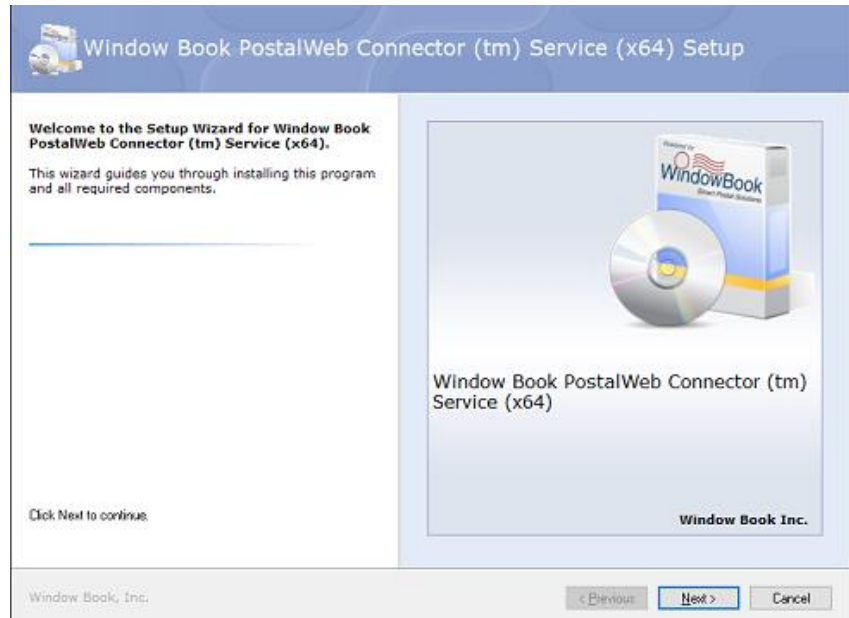


... followed by the launch of the 'verifying contents' screen of the PWC's Installation Wizard.

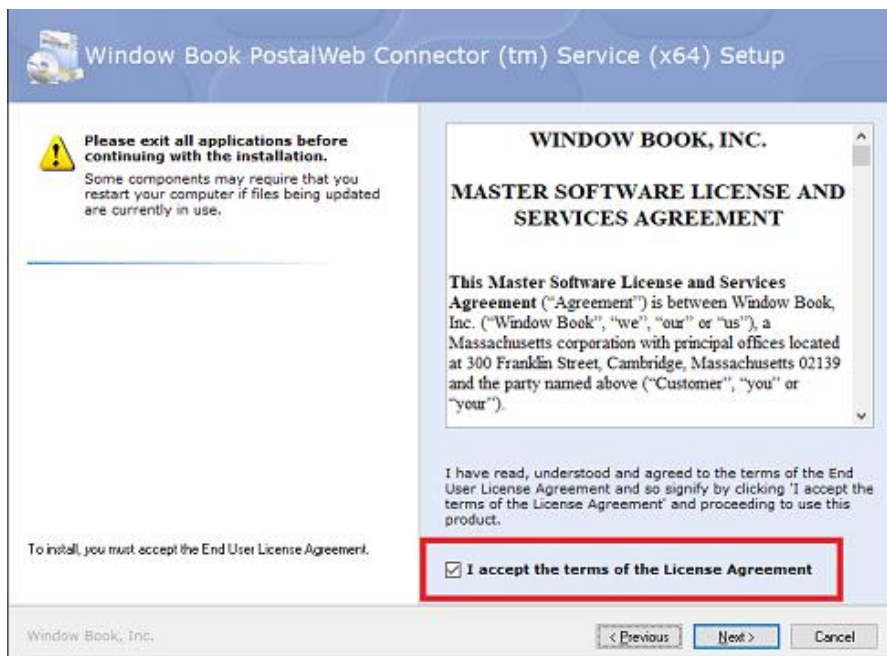


4. Once the verification completes, the *Welcome to the Setup Wizard...* screen for the PostalWeb Connector will display.

Click the **Next** button to continue;

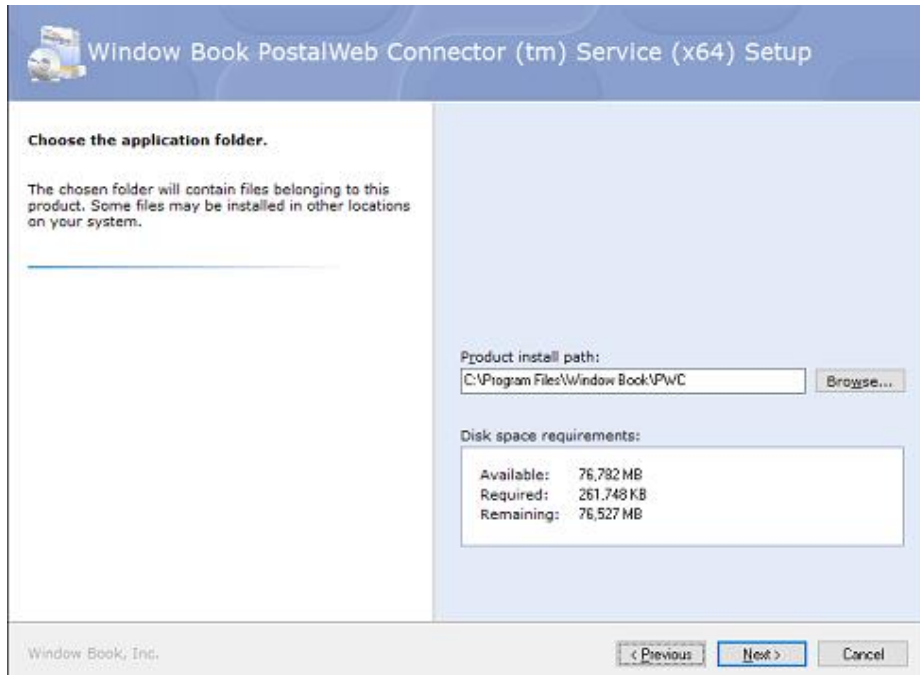


5. The *Please exit all applications before continuing* screen will display. After closing any open applications on the system, accept the terms of the License Agreement (viewable from the window in the screen), and click the **Next** button to continue;

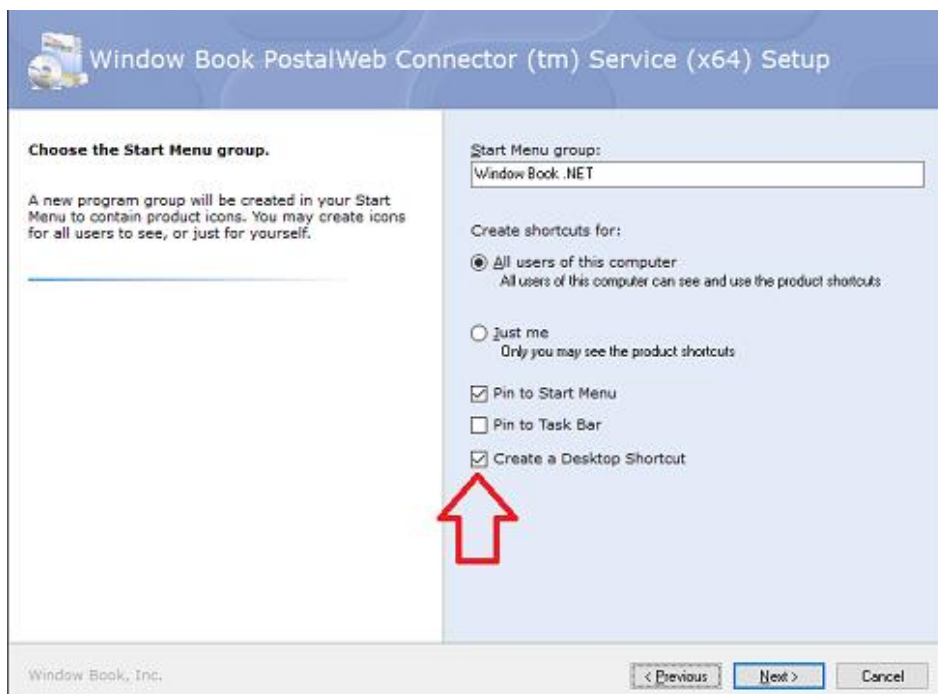


Updating Your Software

- The *Choose the application folder* screen will display. Window Book strongly recommends using the default location provided; however, the location can be changed if preferred, by clicking the **Browse...** button. Click the **Next** button to continue;



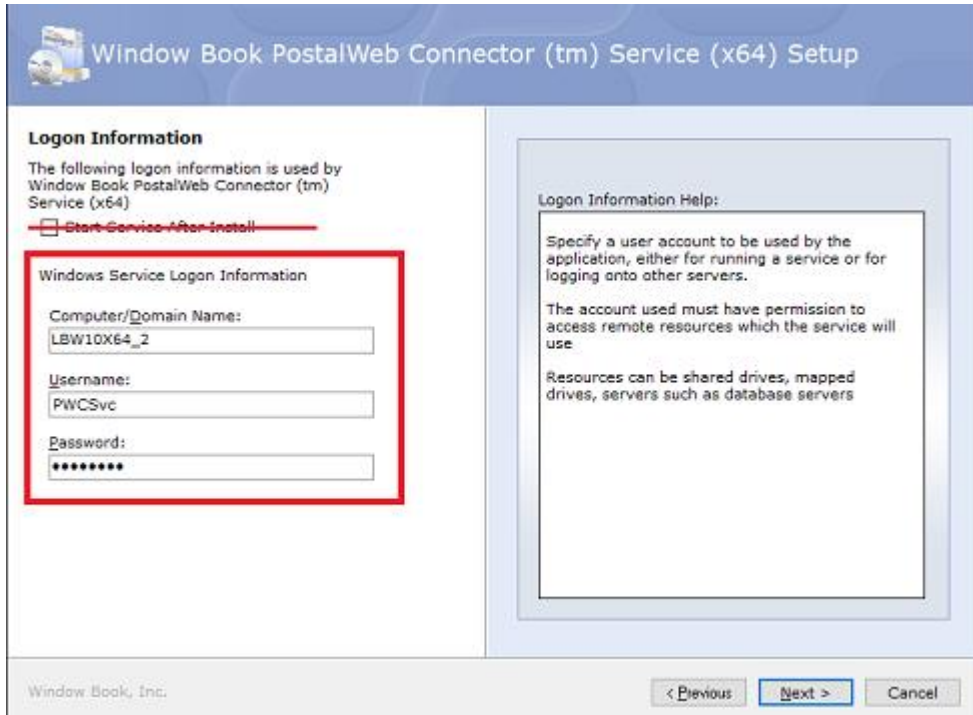
- The next screen will ask to have the 'Start Menu Group' specified along with some other options to be enabled after the installation is complete. Leave the Start Menu Group as the default and enable any of the other options as needed (e.g. enable 'Create a Desktop Shortcut'). When ready, click the **Next** button to continue;



- The *Logon Information* screen will display. Do NOT select the option to 'Start Service After Install'.

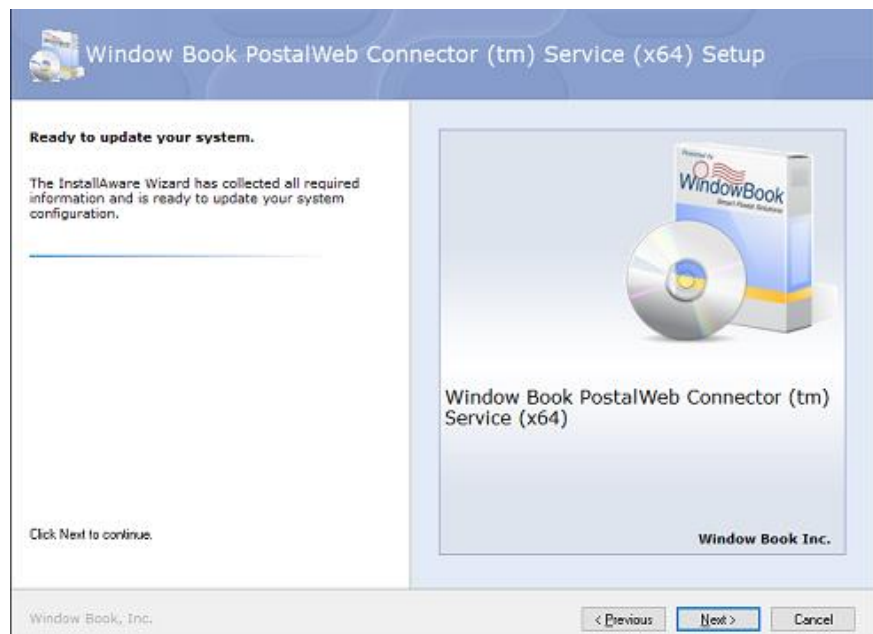
The 'Computer/Domain Name' will default to the name of the computer or server that the PostalWeb Connector is being installed on.

The 'Username' and 'Password' will automatically be populated with the credentials entered as part of [steps 1 and 2](#) above. Only change the credentials if necessary. Click the **Next** button to continue;



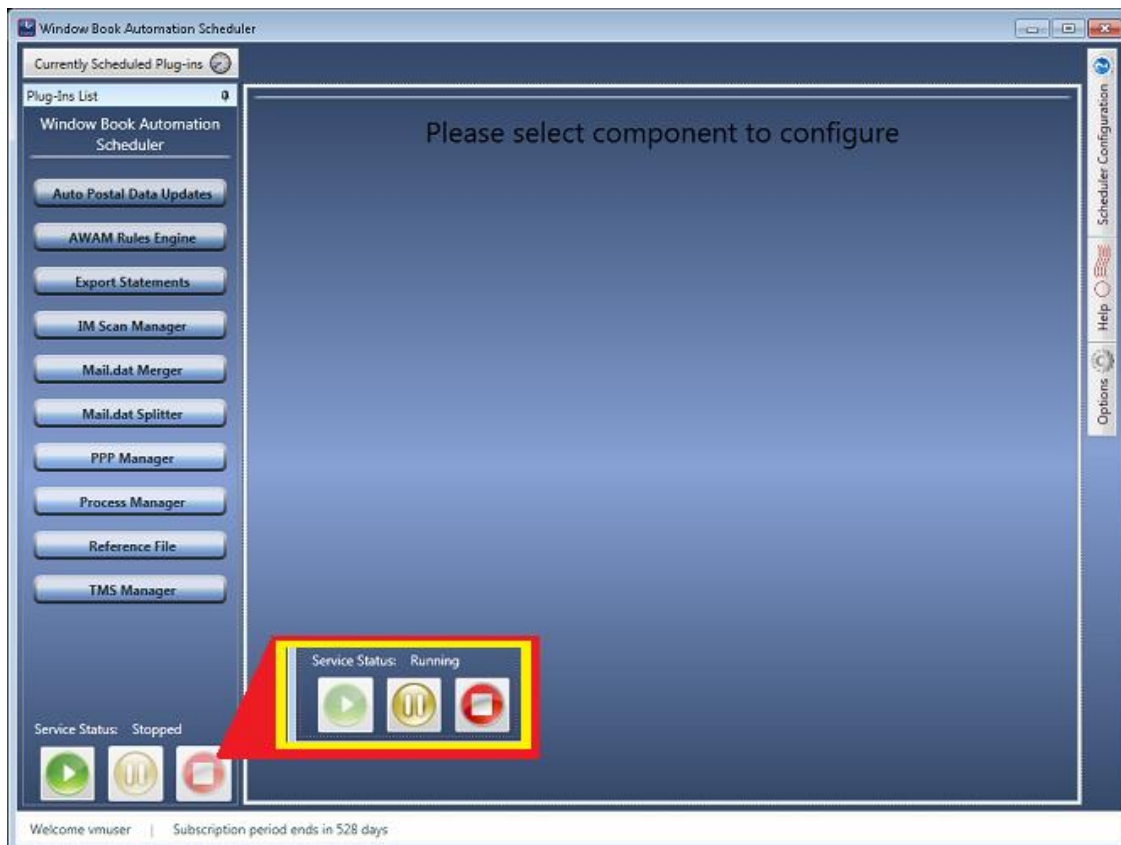
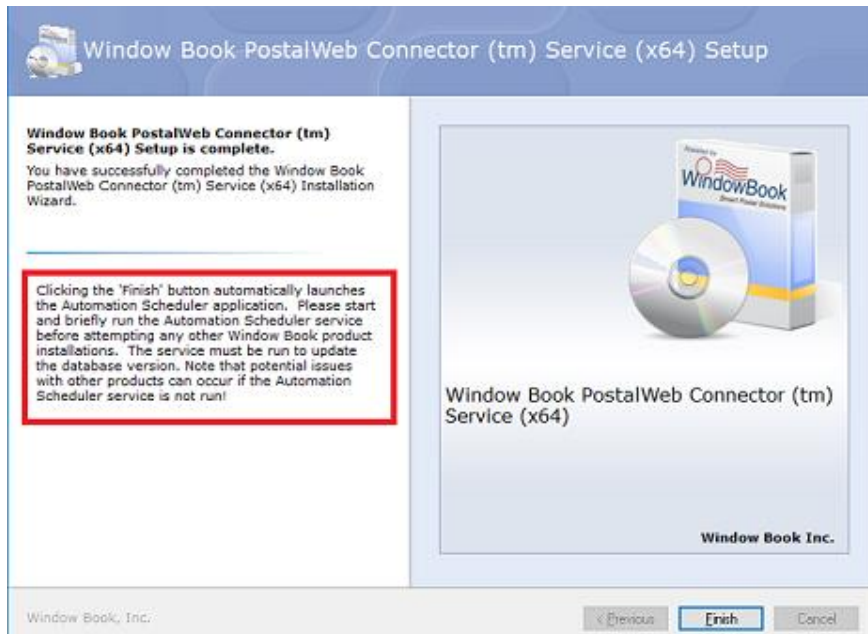
- The *Ready to update your system* screen will display.

Click the **Next** button to install the software update;



Updating Your Software

10. When the update completes, the 'setup complete' screen displays. Note the instructions provided on the screen. A few moments after the **Finish** button is clicked, the Automation Scheduler application will automatically launch. Users are required to start/run the Automation Scheduler service for a few moments in order to update the database version information. **This is necessary for other Window Book products to run properly!**



PLUG-IN SETUP & CONFIGURATION

This section of this System Guide provides setup and configuration instructions for the available plug-ins, which are:

- [Auto Postal Data Updates](#);
- [AWAM Rules Engine](#);
- [Export Statements](#);
- [IM Scan Manager](#);
- [Mail.dat Merger](#);
- [Mail.dat Splitter](#);
- [PPP Manager](#)¹;
- [Process Manager](#);
- [Reference File](#); and
- [TMS Manager](#).

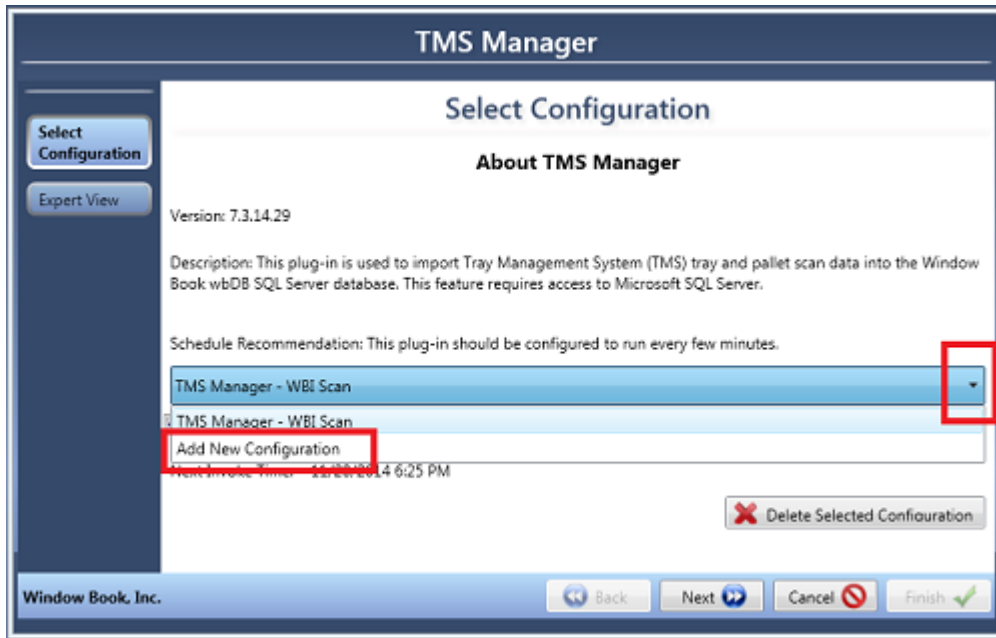
The instructions in this Guide are for the first-time set-up of a single configuration for each available plug-in. More than one configuration can be created and run for some of the available plug-ins, however.

¹ The Process Manager plug-in should be used in lieu of the PPP Manager plug-in. Refer to the [PPP Manager Plug-in](#) section for more details.

Plug-In Setup & Configuration

To add or create additional configurations, do the following (in the example being used here, an additional configuration for the TMS Manager plug-in is being created):

- Select the specific plug-in from the list. The *Select Configuration* screen will display;
- Click the down-arrow to the right of the configuration list;
- Select the option to 'Add New Configuration'; and



- Proceed with setup and configuration instructions for the specific plug-in found in this Guide to complete the newly created configuration.

An existing configuration can also be deleted by selecting the specific configuration and clicking the **Delete Selected Configuration** button (see screen image above).

Any time a plug-in is configured for the first time and/or modifications are made to a plug-in's existing configuration(s); it is good practice to stop the service before any changes are made with the Automation Scheduler. If or when changes are made with the service running, the service must be stopped and then re-started before the changes will take effect.

To stop the service, click the stop icon  and confirm the status is 'Stopped'.



To start the service, click the start icon  and confirm the status is 'Running'.



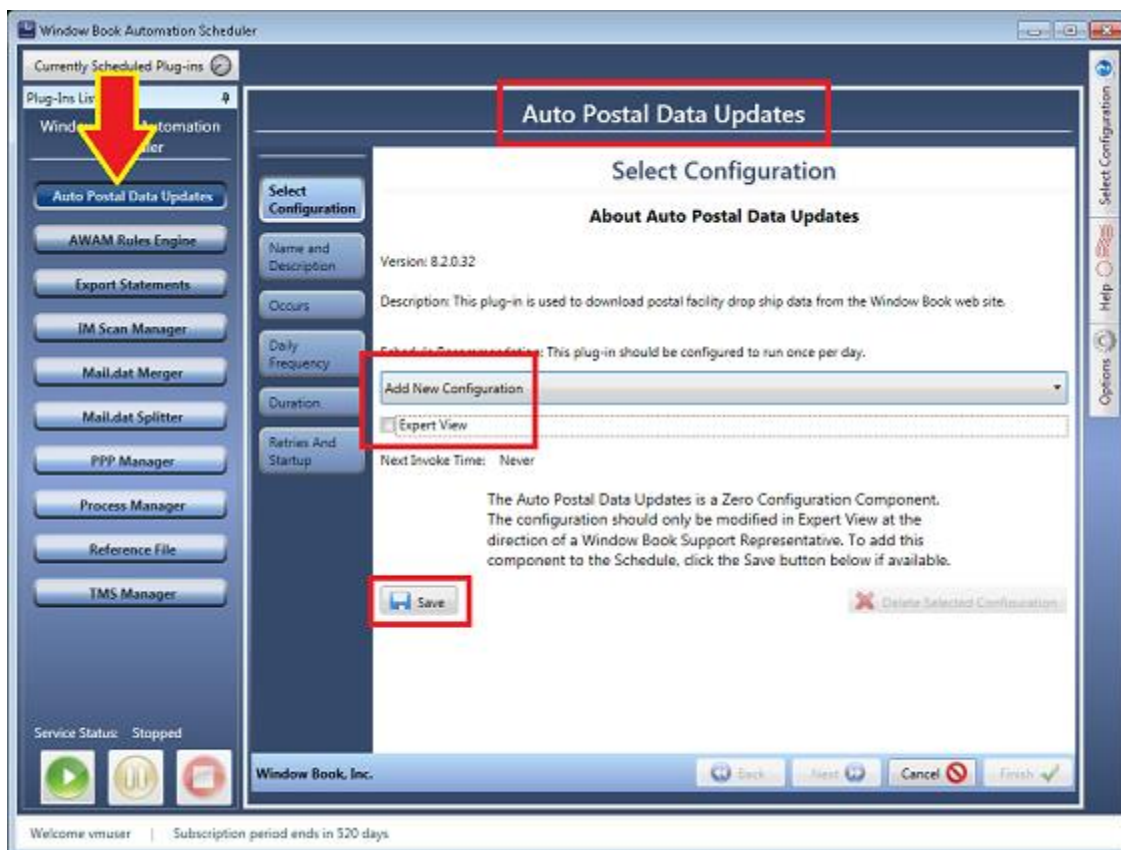
AUTO POSTAL DATA UPDATES PLUG-IN

The Auto Postal Data Updates plug-in is used to download postal facility drop ship and labeling list data from Window Book's Data Distribution Web Service.

This plug-in needs no end-user configuration in order to download postal facility drop ship data. The only step the Client needs to take in order to activate this service is to click the **SAVE** button. The default schedule for the Auto Postal Data Update plug-in to run is every day at 3:00 p.m. beginning the day the plug-in is activated.

i Only one configuration can exist for this plug-in at any given time.

i The Auto Postal Data Updates plug-in is a Zero Configuration Component. The configuration should only be modified in 'Expert View' at the direction of a Window Book Support Representative.



Manual Configuration


The Drop Ship data, which consists of NDC, SCF, and DDU data, is updated daily by the U.S. Postal Service on their web site. In addition, the Labeling List data, which consists of Labeling Lists and City/State information is also updated by the U.S. Postal Service on their web site. Changes to the Labeling List data are; however, less often than the Drop Ship data.

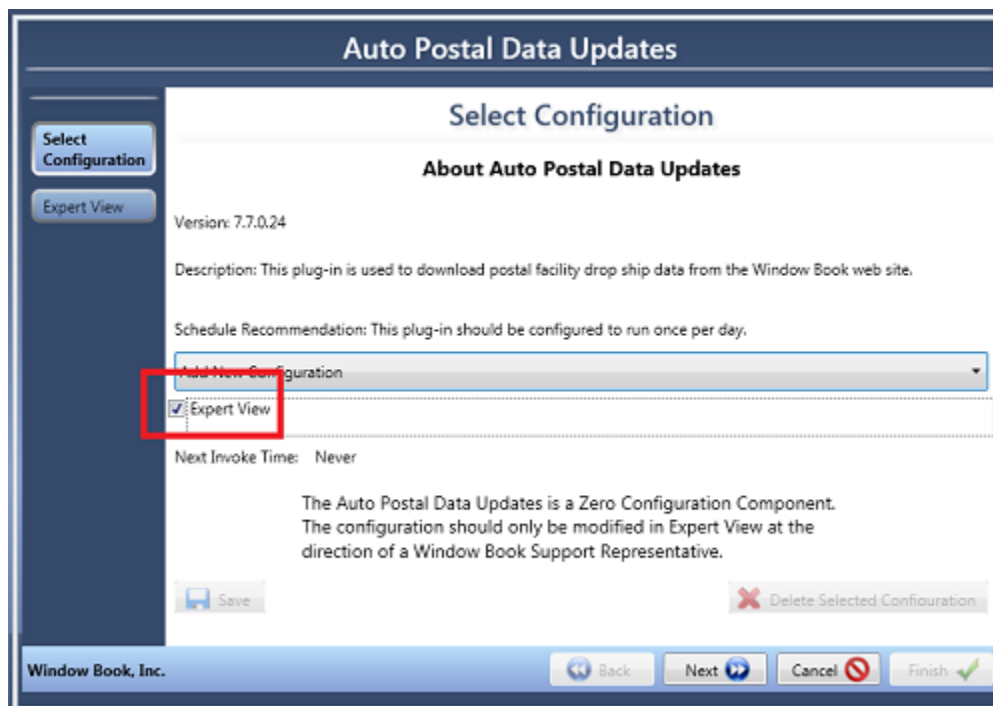
When changes become available, Window Book downloads this data and converts it to a format that can be used by Window Book's software programs.

Since the bulk of this data is updated daily (not including weekends and holidays), it makes sense to configure the Auto Postal Data Updates plug-in to download once or more per day (default), so that the latest information is available at all times.

i *The Auto Postal Data Updates plug-in is a Zero Configuration Component. The configuration should only be modified in 'Expert View' (i.e. manually) at the direction of a Window Book Support Representative.*

To manually configure the Auto Postal Data Updates plug-in, do the following:

1. Launch the Automation Scheduler and stop  the service.
2. Click the **Auto Postal Data Updates** button. The *Select Configuration* screen will display:
Enable (check) the 'Expert View' option, and click the **Next** button to continue;



- The *Expert View* screen will display. Specify the frequency when and how often the service (plug-in) will run;

i *Window Book does not recommend enabling the option to 'Run at start-up' found in the "Expert View" screen unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

The screenshot shows the 'Auto Postal Data Updates' configuration window in 'Expert View'. The window title is 'Auto Postal Data Updates' and the sub-title is 'Expert View'. On the left, there are two buttons: 'Select Configuration' and 'Expert View'. The main area contains the following fields and options:

- Name: Auto Postal Data Updates
- Description: This plug-in should be configured to run once per day.
- Recurs Every: Daily, Weekly (1 Day(s)), Monthly
- Occurs Once At: 3:00 PM
- Occurs Every: (empty dropdown), Starting At: Enter time, Ending At: Enter time
- Start Date: Monday, August 18, 2014
- End Date: Tuesday, August 19, 2014
- No End Date:
- Retries Count: 3, Retry Seconds: 300, Run at start-up:

At the bottom, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'. The 'Next' button is highlighted with a blue glow.

Click the **Next** button to continue;

Plug-In Setup & Configuration

4. The *Step 1* screen will display:


Enable Plug-in Logging (1): Select (check) to enable message logging to the Windows Event log. This does not necessarily need to be checked (enabled); however, it can be useful if issues arise that require technical support;

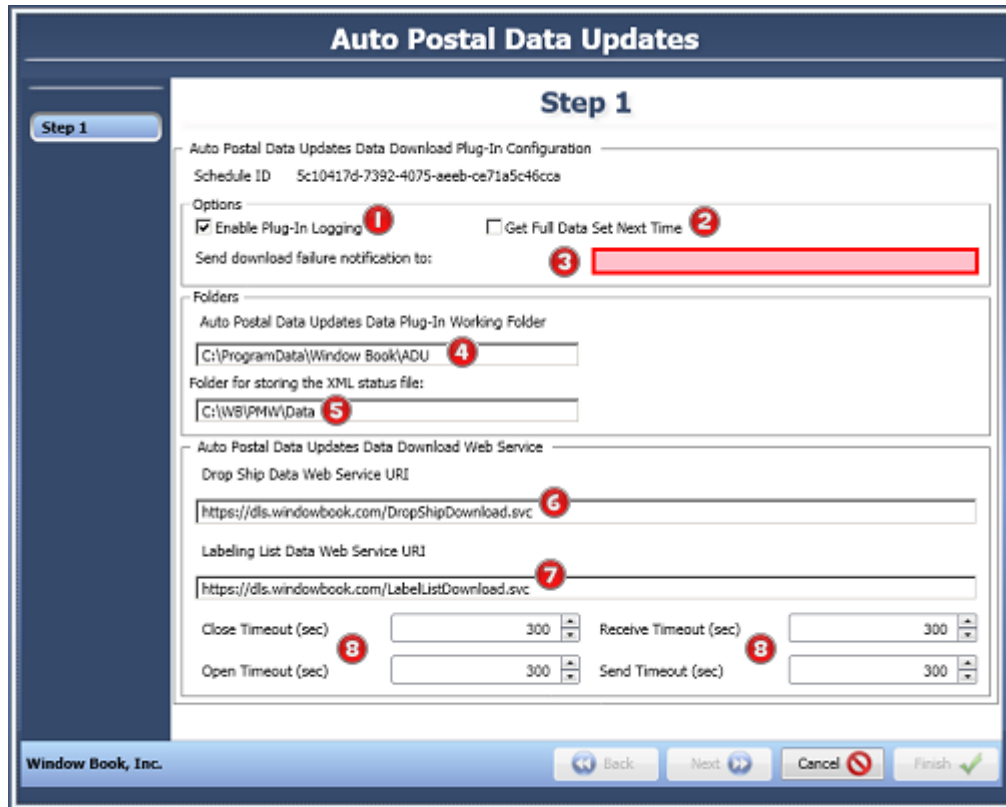
Get Full Data Set Next Time (2): This is not typically required and would generally only be used for the first start of the plug-in;

Send Download Failure Notification To (3): If for any reason the auto-download fails, the Automation Scheduler / Auto Postal Update plug-in will send an email notification to the email address entered in this field;

Auto Postal Data Updates Data Plug-in Working Folder (4): This folder is not configurable and is only shown for informational purposes. It is automatically created/specified by the software if it does not already exist;

Folder For Storing The XML Status File (5): This folder is automatically created/specified by the software if it does not already exist. The default path of 'C:\WB\PMW\Data' is used. Make sure the path name is correct, based on the location of the DAT-MAIL data folders, specifically the 'WB\PMW' folder;

 **Those Clients using DAT-MAIL:** If the server installation of DAT-MAIL was set up so that DAT-MAIL's data folders reside on a drive different than the default of C:, the default path for the 'Folder For Storing The XML Status File' **5** will have to be modified to show the correct location. For example, the default installation path for DAT-MAIL's 'PMW\data' folder is 'C:\WB\PMW\Data'; however, some Clients prefer to install DAT-MAIL's data folders on a different drive due to possible drive size restrictions (e.g. 'D:\WB\PMW\Data').



Auto Postal Data Updates

Step 1

Auto Postal Data Updates Data Download Plug-In Configuration

Schedule ID 5c10417d-7392-4075-aeeb-ce71a5c46cca

Options

Enable Plug-In Logging **1** Get Full Data Set Next Time **2**

Send download failure notification to: **3**

Folders

Auto Postal Data Updates Data Plug-In Working Folder

4

Folder for storing the XML status file:

5

Auto Postal Data Updates Data Download Web Service

Drop Ship Data Web Service URI

6

Labeling List Data Web Service URI

7

Close Timeout (sec) **8** Receive Timeout (sec) **8**

Open Timeout (sec) Send Timeout (sec)

Window Book, Inc.

Drop Ship Data Web Service URI **6:** The URL for the Window Book web site from which the Drop Ship data files are downloaded (i.e. <https://dls.windowbook.com/dropshipdownload.svc>);


Labeling List Data Web Service URI **7:** The URL for the Window Book web site from which the Labeling List data files are downloaded (i.e. <https://dls.windowbook.com/labellistdownload.svc>);

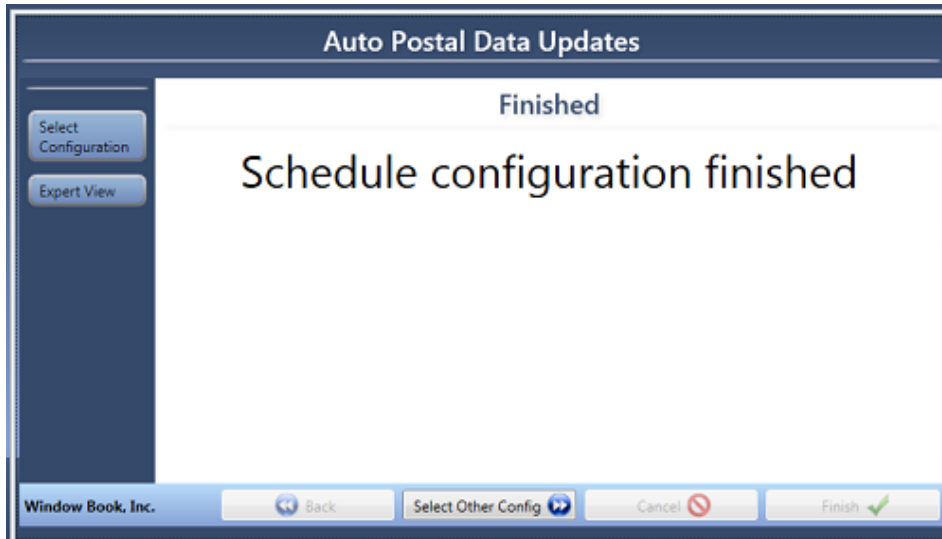
Close, Open, Receive, and Send Timeout **8:** These times are the maximum times in seconds, to allow communication with the Window Book Data Distribution Web Service to wait before the communication timeout is treated as an error condition.

 **References 6, 7, and 8 should only be changed when directed to by a Window Book Technical Support Representative!**

Click the **Finish** button.

Plug-In Setup & Configuration

5. The *Finished* screen will display. Start  the service.

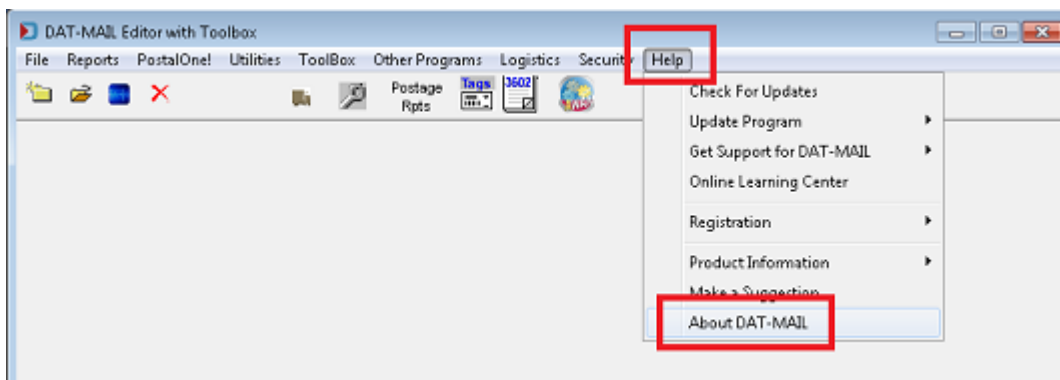


Confirmation That the Plug-in Is Running

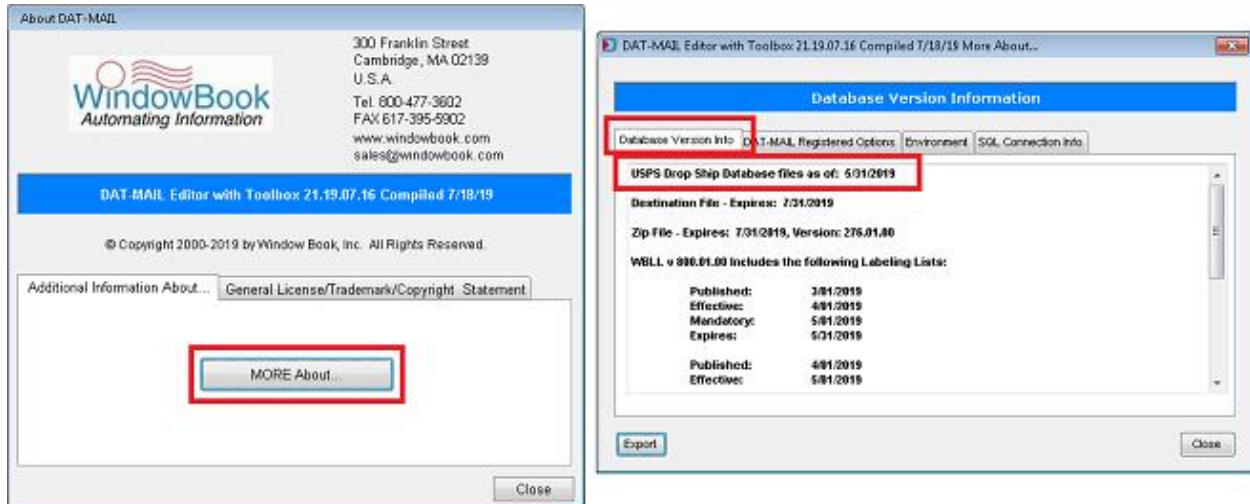
The default schedule for the Auto Postal Data Update plug-in to run is every day at 3:00 p.m. beginning the day the plug-in was activated (either clicking the **SAVE** button – refer to the [Auto Postal Data Update](#) section above – or through the manual configuration of it – refer to [Manual Configuration](#) section above).

Determine the date and time the plug-in was scheduled to run. Once this information is known, confirmation that the Auto Postal Updates plug-in is running as scheduled can be obtained in one of two ways:

1. Launch DAT-MAIL on the server. From DAT-MAIL's home screen, click the 'Help' menu and select 'About DAT-MAIL';



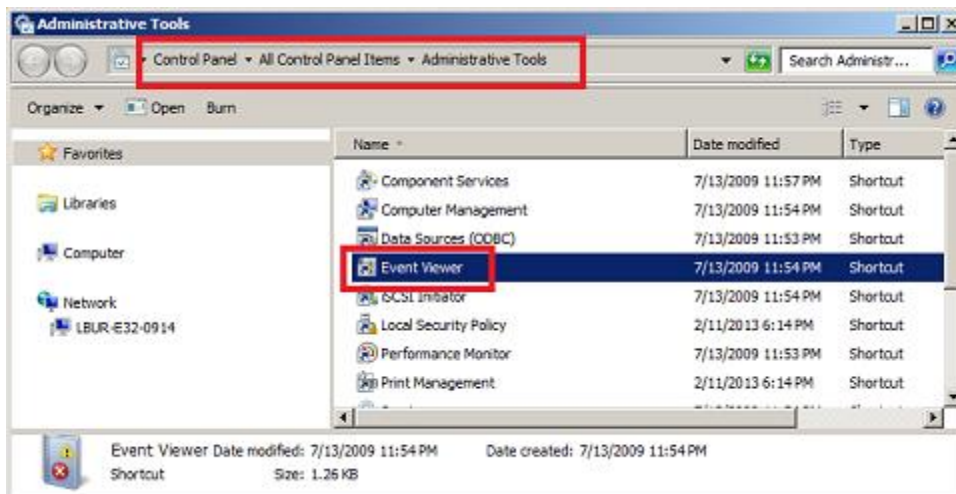
The *About DAT-MAIL* dialog will display. Click the **MORE About...** button. The *More About...* dialog will display. In the 'Database Version Info' tab, the first line of data will display when the drop ship database files were updated (i.e. 'USPS Drop Ship Database files as of'). The date displayed should correspond with whatever day the screen is being viewed as long as it is past the scheduled update time specified in the Auto Postal Data Update plug-in; otherwise, the date displayed will be of the previous day.



2. Using Windows Event Viewer:

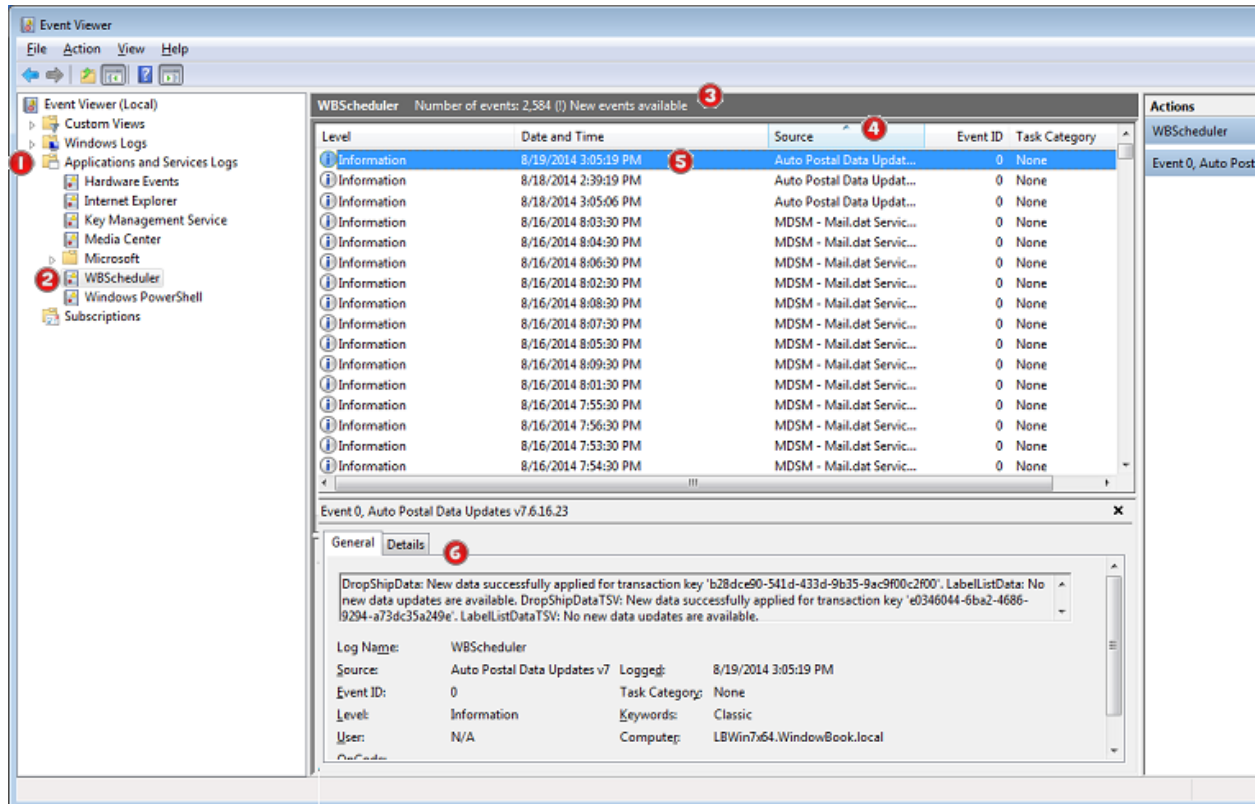
From the computer or server, the Automation Scheduler is installed on, click on 'Start' and select 'Control Panel'. From within the Control Panel, select 'Administrative Tools'.

Locate the 'Event Viewer' from the list provided and double click on it to launch it.



Plug-In Setup & Configuration

The Event Viewer screen will display. Located in the left-most panel, click the down arrow located to the left of the 'Applications and Service Logs' folder **1** to expand it;



Single-click on the 'WBScheduler' **2** to view the Automation Scheduler's recent activity, which is displayed in the screen's center panel **3**.

The list of events could be quite lengthy depending on the number of services that have been running (plug-ins installed and configured), as well as the frequency of which they are schedule to run at. To make the events for the Auto Postal Data Update easier to locate, click on the 'Source' column header **4** which contains the list of the plug-ins that are configured and running. This will alphabetize the list. The Auto Postal Data Update plug-in will display at the top.

Note the date and time the most recent event occurred for the Auto Postal Data Update plug-in. Select it by single-clicking anywhere on the event line **5** and note the event's corresponding message displayed below the list of events **6**. Confirm the update occurred.



If the Auto Postal Data Updates plug-in is not running or performing as expected, do the following (if the tips below do not result in the event occurring as scheduled, [contact Window Book Technical Support](#)):

- **Confirm the Automation Scheduler's service is running (refer to [Plug-in Setup & Configuration](#) section in this Guide);**

- *Confirm the file path for the 'Folder For Storing The XML Status File' is correct (refer to step 4 under the Auto Postal Data Updates, [Manual Configuration](#) section); and*
- *Confirm the URI's for the Drop Ship and Labeling List data have not been modified/are correct (refer to step 4 under the Auto Postal Data Updates, [Manual Configuration](#) section).*

AWAM RULES ENGINE PLUG-IN

The AWAM Rules Engine plug-in works with Window Book's Advanced Workflow Automation Manager or AWAM™; specifically, the AWAM Rules Manager (Rules Manager). The plug-in is responsible for automatically detecting new Mail.dat files in a single import hot-folder or in a sub-folder one level down from that hot-folder. The plug-in then works in conjunction with the Rules Manager, and applies rules created by the Mailer against the Mail.dat files. If the data in a Mail.dat file triggers a specific rule (i.e. matches the rule's criteria), the Mail.dat file is automatically moved to the folder that is associated with the AWAM profile specified in that rule. The Mail.dat file is then imported into DAT-MAIL using AWAM, based on the criteria and rules defined within that corresponding profile.

If a specific, 'normal' rule is not triggered by a Mail.dat file, a 'default' rule is then triggered, and the plug-in moves the Mail.dat file to the folder specified in AWAM's/DAT-MAIL's default profile.

In addition, Mailers can create a 'reject(s)' rule that can be triggered for Mail.dat files that are not to be imported into DAT-MAIL (e.g. jobs a Mailer would send to a commingler that would not be handled by DAT-MAIL). In this case, if a Mail.dat file triggers a 'reject' rule, then the file is automatically moved into a folder specified/created by the Mailer that is specifically for files that are not to be imported into DAT-MAIL and no AWAM profile is applied.



****IMPORTANT*: If a rule in the AWAM Rules Manager is to be edited, the AWAM Rules Engine plug-in should always be stopped first, in the Automation Scheduler. Do not stop the Automation Scheduler's service but stop the AWAM Rules Engine plug-in itself. This can be accomplished in the plug-in's "Expert View" screen by adding an end date to the plug-in (refer to step 2 in the procedure below for a screen image reference). Once the editing of the rule(s) is complete, remember to remove the end date in the plug-in's "Expert View" screen so that the plug-in will resume its' normal function.***

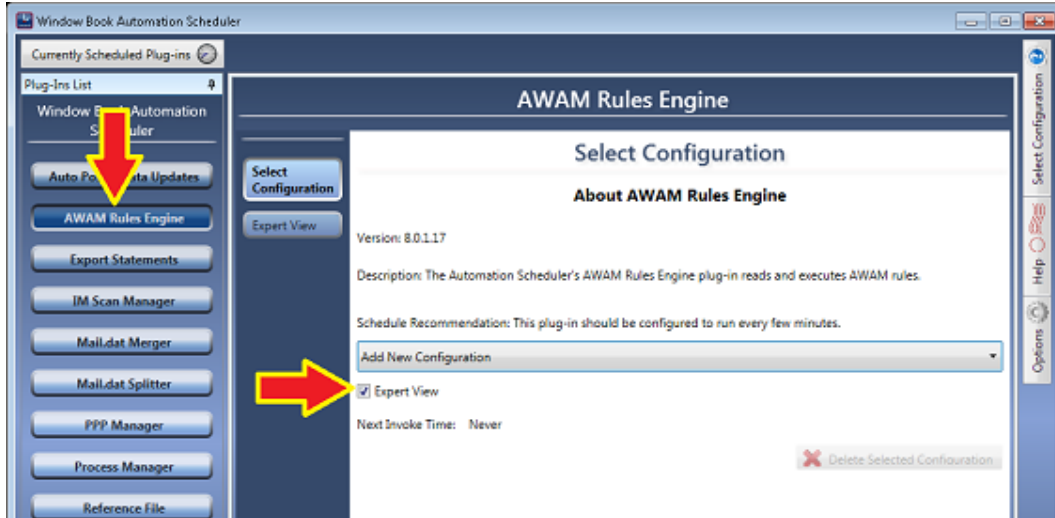


Documentation for AWAM is available in the "[AWAM Setup Guide](#)" and the "[AWAM User Guide](#)". Documentation for the AWAM File Manager and Rules Engine is available in the "[AWAM File Manager Installation & User Guide](#)".

Plug-In Setup & Configuration

To configure the AWAM Rules Engine plug-in, do the following:

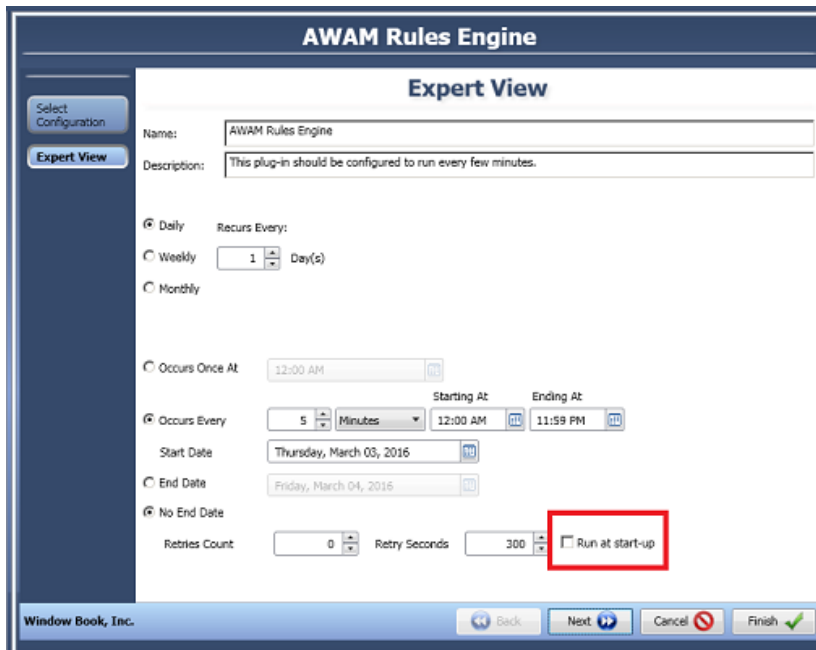
1. Click the **AWAM Rules Engine** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



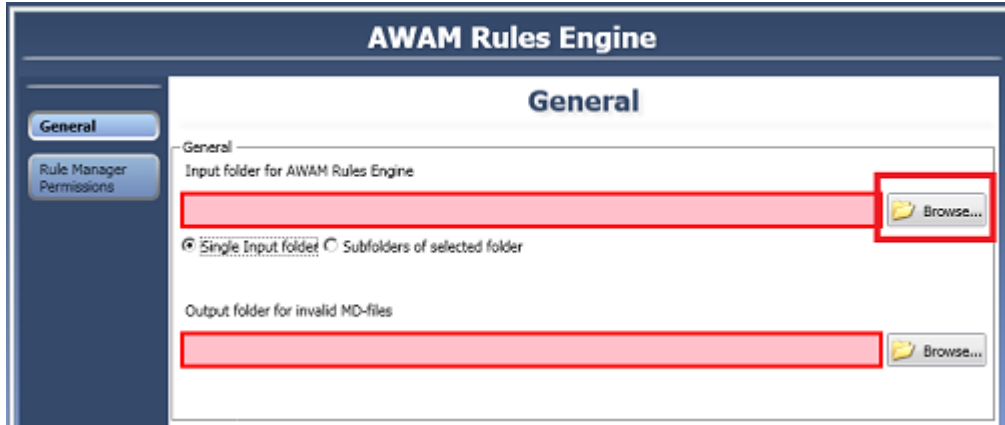
2. The *Expert View* screen will display. Specify when and how often the plug-in's process will run.

i *Window Book does not recommend enabling the function to 'Run at start-up' unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

Click the **Next** button to continue;

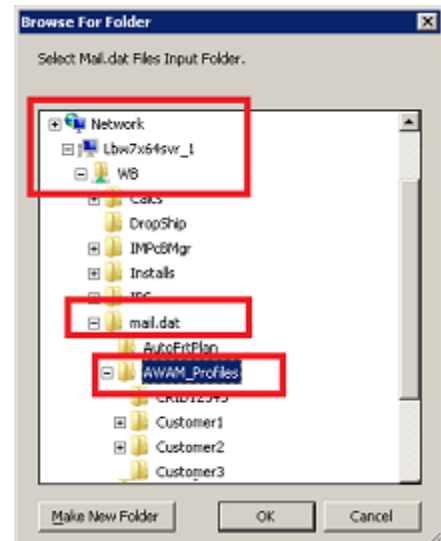


- The *General* screen will display. Within this screen, the user can select or create a single, main folder that acts as a hot-folder that the AWAM Rules Engine plug-in will monitor for incoming Mail.dat files, or this same folder can contain sub-folder(s) (one level down) that the plug-in can be set up to monitor. Click the **Browse...** button.



i *In a server with workstation(s) environment, UNC path names must be used when specifying the main hot folder. In addition, the hot folder must be located within a directory that is shared and available to all users/systems. Window Book recommends creating this hot folder within the main, Window Book or 'WB' directory.*

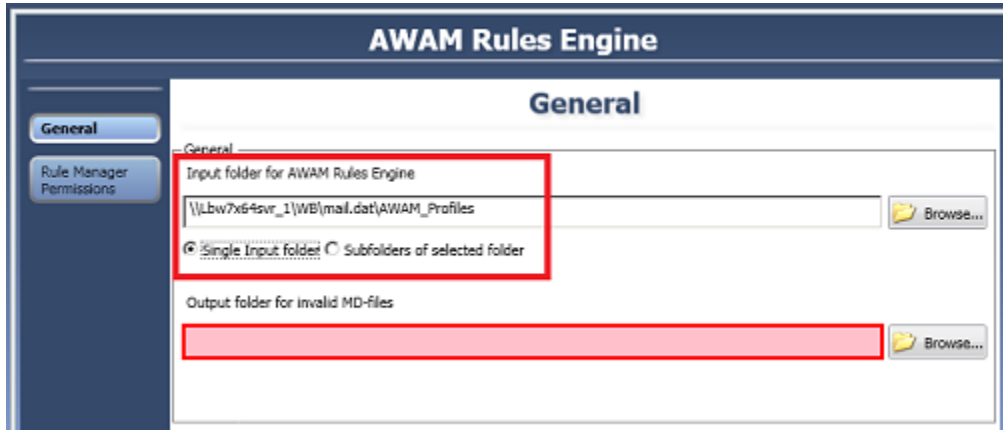
Click the **OK** button when finished to close the dialog;



- The *General* screen will again display. The folder created/selected and the path to its location will be specified.

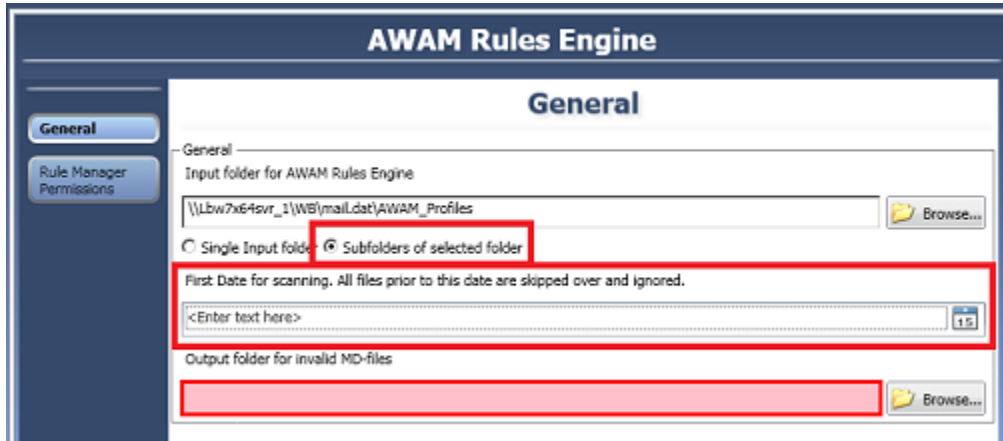
Plug-In Setup & Configuration

At this time, select whether or not the AWAM Rules Engine will monitor this single input or hot-folder (i.e. 'Single Input folder) or whether it should monitor any sub-folders (one level down) of this main folder (i.e. Sub-folders of selected folder);



If the option to monitor sub-folders is selected, a cut-off date can be entered. Mail.dat files that are identified by the plug-in in that sub-folder(s) that are older than the date entered will be ignored by the AWAM Rules Engine plug-in.

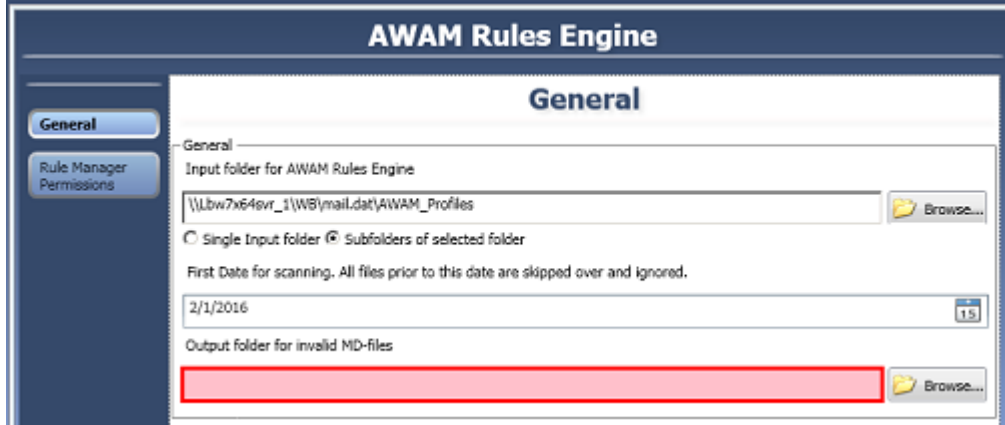
i *The cut-off date applies to sub-folders only. It does not apply to the single input folder.*



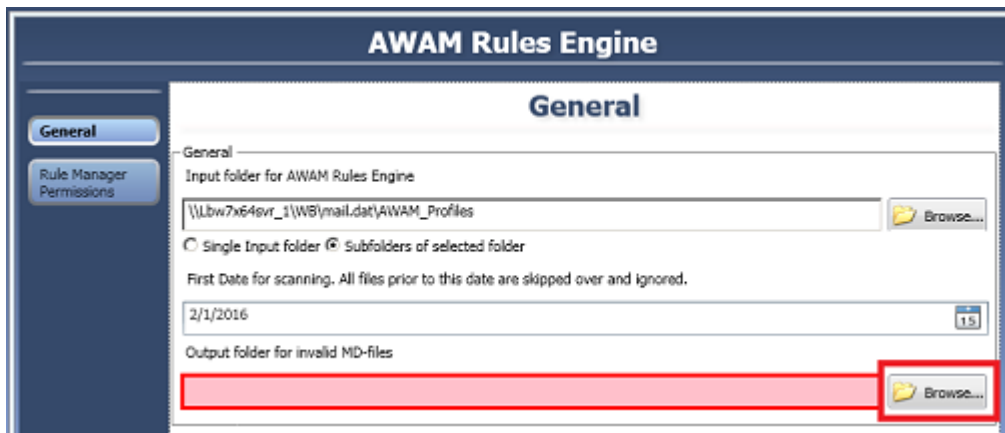
Click the calendar icon to display a calendar, from which a data can be selected.



In the example here, a date of 2/1/2016 was selected;

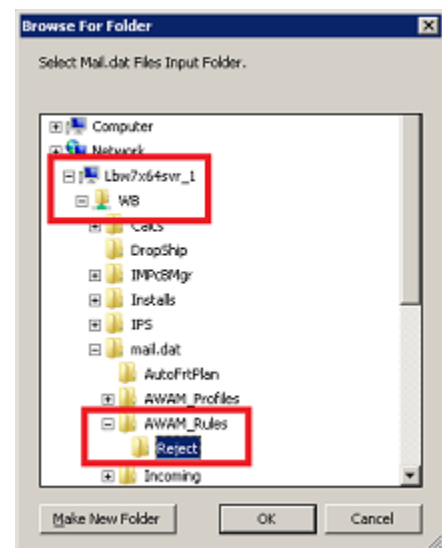


5. Click the **Browse...** button to select a folder to be used for Mail.dat files that are invalid and/or should not be imported into DAT-MAIL.



A *Browse for Folder* dialog will display. Create and/or select the folder to be used by the Rules Manager for invalid and/or rejected Mail.dat files.

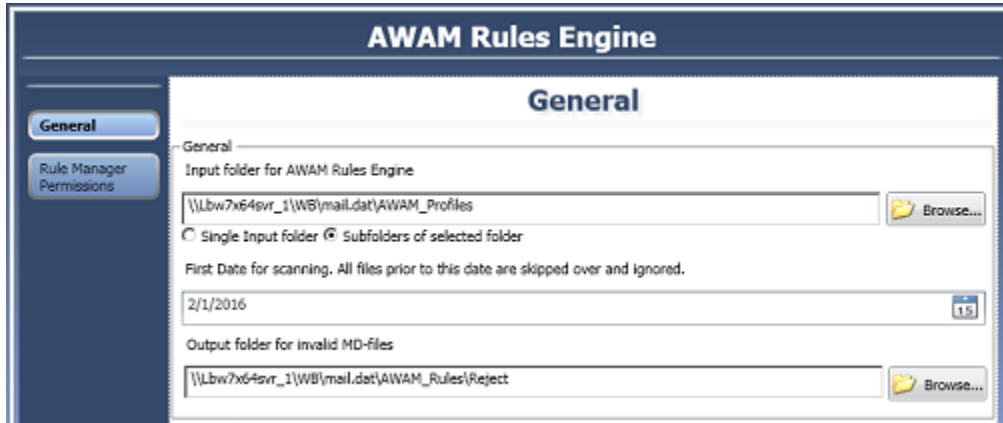
i *In a server with workstation(s) environment, UNC path names must be used when specifying the main hot folder. In addition, the hot folder must be located within a directory that is shared and available to all users/systems. Window Book recommends creating this hot folder within the main, Window Book or 'WB' directory.*



Once the folder is created and/or selected, click the **OK** button to close the dialog;

Plug-In Setup & Configuration

- The General screen will be displayed with the created/selected folder shown. Click the **Next** button to continue;

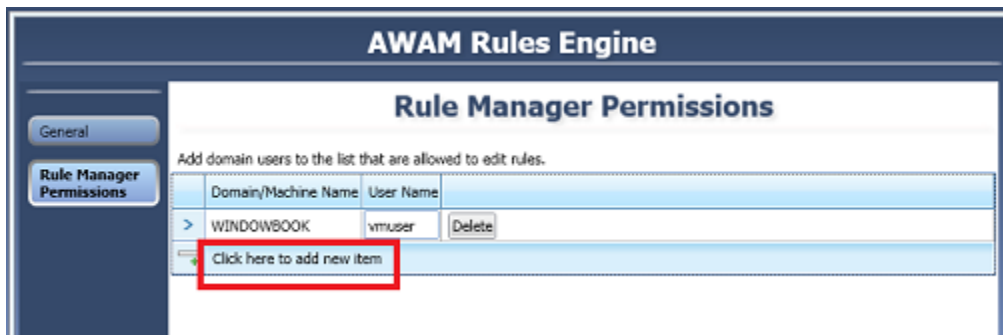


The screenshot shows the 'AWAM Rules Engine' interface with the 'General' tab selected. The 'Input folder for AWAM Rules Engine' is set to '\\Lbw7x64svr_1\WB\mail.dat\AWAM_Profiles'. The 'First Date for scanning' is set to 2/1/2016. The 'Output folder for invalid MD-files' is set to '\\Lbw7x64svr_1\WB\mail.dat\AWAM_Rules\Reject'.

- The *Rule Manager Permissions* screen will display. This screen is designed to provide access or rights control over the AWAM Rules Manager. Rights options consist of view only and full access. Users are automatically granted view only rights. To gain full access rights, their corresponding Domain and Username information must be added to this screen. Users with full access rights will be able to add, modify, and delete rules.

! *Mailers should take care to grant full access rights to only qualified individuals. Modifications to existing rules, and/or adding or deleting rules can have a major impact on production and may cause unwanted or unexpected system behavior to occur.*

To add a user, click the area on the screen labeled “Click here to add new item”.

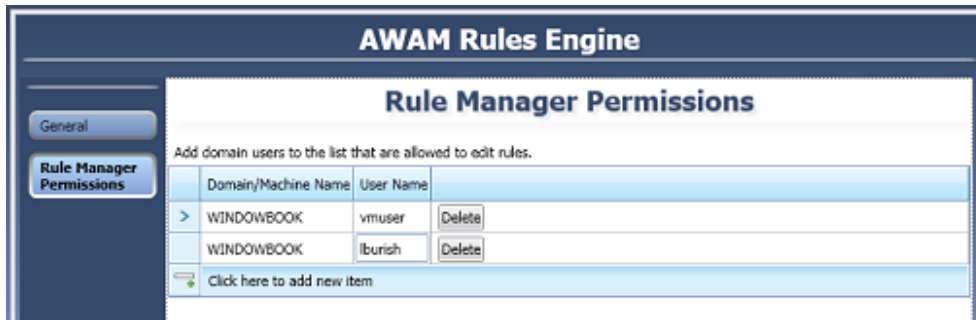
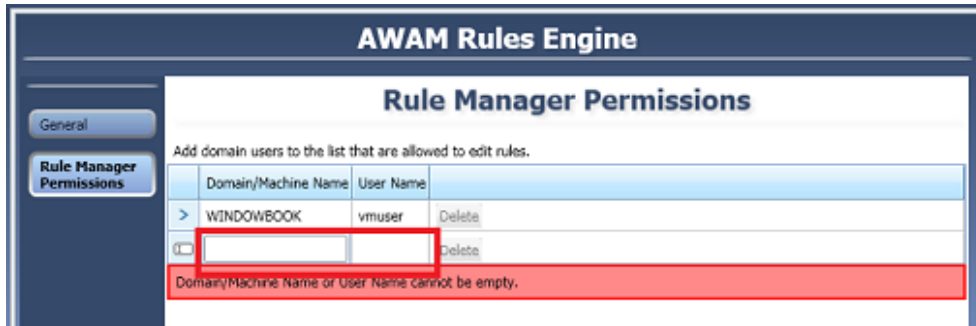


The screenshot shows the 'AWAM Rules Engine' interface with the 'Rule Manager Permissions' tab selected. The screen displays a table with the following data:

Domain/Machine Name	User Name	
WINDOWBOOK	vmruser	Delete

Below the table, there is a button labeled "Click here to add new item" which is highlighted with a red box.

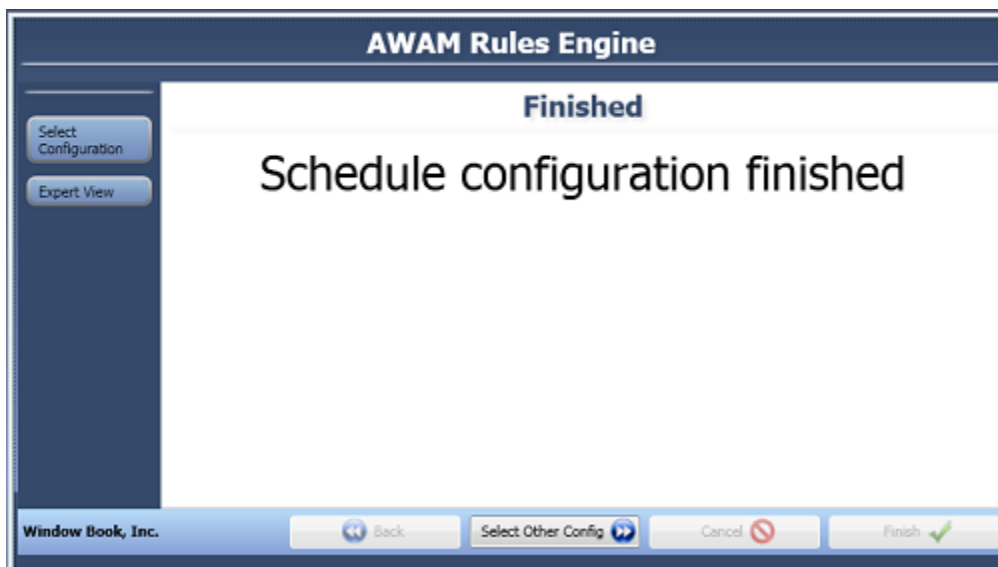
Enter the Domain/Machine Name for the user; as well as, the Username associated with the account. Click anywhere on the screen for the entry to be activated.



To delete a user, thereby restricting their rights to view only, click the corresponding **Delete** button;

i *Full access rights can also be granted or deleted from within the Rules Manager. Refer to the [“AWAM File Manager Installation & User Guide”](#) for more information.*

8. Click the **Finish** button. The *Finish* screen will display. The configuration is complete!



EXPORT STATEMENTS PLUG-IN

The Export Statements plug-in was designed as a data exporter for a Client-specific project. It exports finalized Client-specific statement data and also .pdf documents for those statements.

i *The Export Statements plug-in was developed for a custom project and is not intended for public use. Contact your Window Book Sales Representative for more information. Contact information can be found in the [Contact Information](#) section of this Guide.*

i *Only one configuration can exist for this plug-in at any given time.*

The Export Statements plug-in is configured by first enabling the Export View feature and clicking the **Next** button.

i *Window Book does not recommend enabling the option to 'Run at start-up' found in the "Expert View" screen unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

The set-up screens for the plug-in allow the Client to:

- Configure when and how often the export process should run;
- Enable logging for the process if necessary (this is generally only enabled at the direction of a Window Book Technical Support Representative);
- Select the Export Processor Executable File (WBBREXPORTAPSV707.exe) located in the 'MDV' folder on the server (i.e. '\\...WB\MDV');

i *The Export Statements plug-in requires Window Book's DAT-MAIL software be installed.*

- Specify the Process Start Options (i.e. 'What to do if the process is already running?'). The recommended option is: 'Exit without starting a new process';
- Enter Command Line Arguments; however, this is not necessary; and
- Enable and set up one or both notification types: Email; and/or SMS text messaging to send notifications when the process runs without errors, and/or when the process encountered errors and failed.

IM SCAN MANAGER PLUG-IN

The IM Scan Manager plug-in is used to mark already imported files containing Intelligent Mail Piece Barcodes into a SQL Server database as spoiled. This data can then be used in Window Book products for such purposes as the Spoilage Tracking module in DAT-MAIL.

To configure the IM Scan Manager plug-in, do the following:

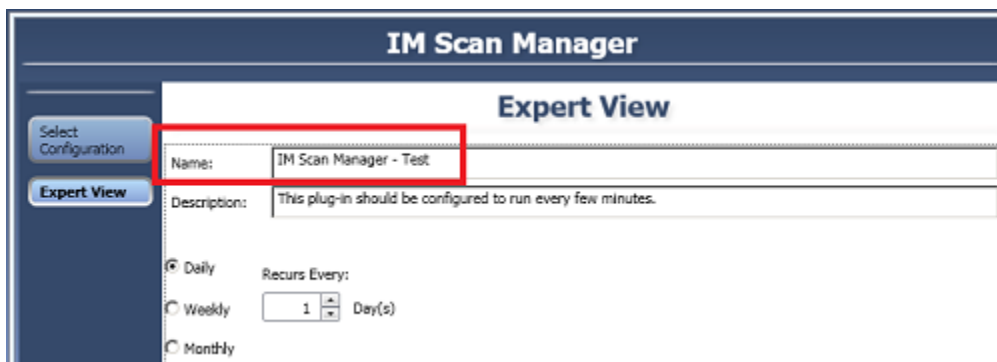
1. Click the **IM Scan Manager** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



2. The *Expert View* screen will display. Enter a name specific to the configuration being created and specify when and how often the plug-in's process will run.

i *Window Book does not recommend enabling the function to 'Run at start-up' unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

Click the **Next** button to continue;



Plug-In Setup & Configuration

3. The *Spoilage Import* screen will display.



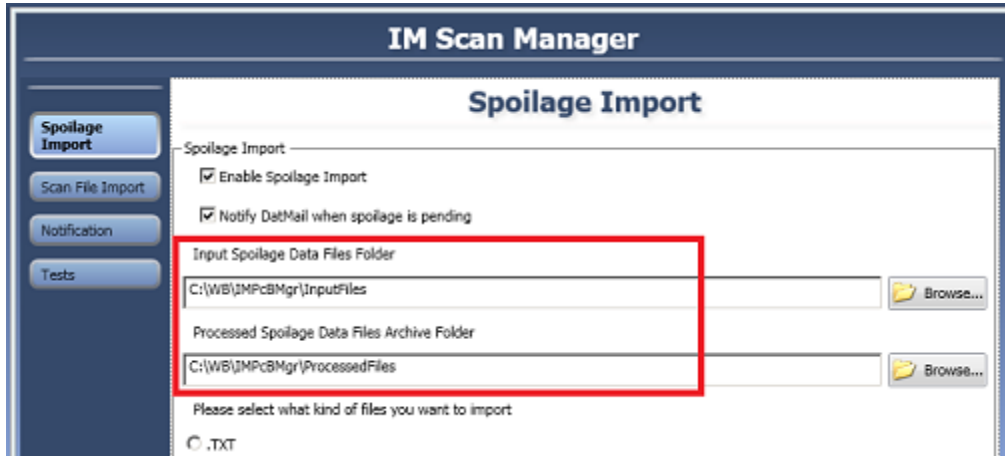
If they are not already selected, enable (check) the option to 'Enable Spoilage Import' and 'Notify DAT-MAIL when spoilage is pending' **1**;

When the Spoilage Import screen is displayed the first time, a directory called 'IMPCBMgr' is automatically created on the server under the 'WB' folder (i.e. '\\...WB\ IMPCBMgr'). Within the 'IMPCBMgr' directory two sub-folders are also created: 'InputFiles' (displayed as the 'Input Spoilage Data Files Folder' **2**) and 'ProcessedFiles' (displayed as the 'Processed Spoilage Data Files Archive Folder' **3**). To view the folders' contents, click the corresponding **Browse...** button;

Select the type of files to be imported (the default selection is 'Both'), and specify the IM Piece Barcode Start Position, as well as the Field Length **4**;

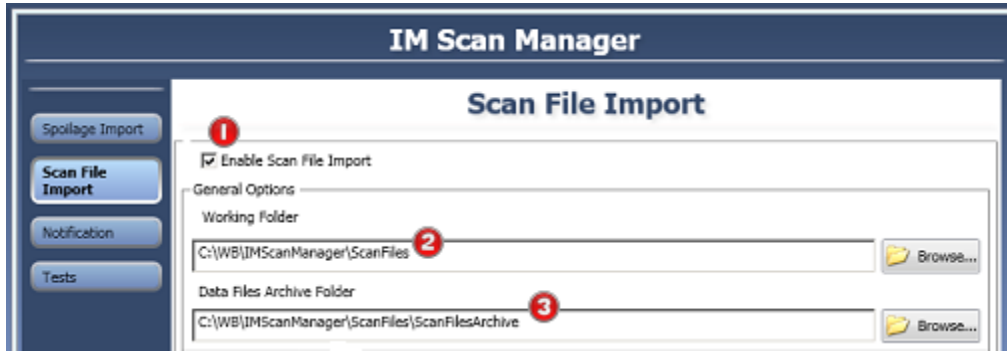
i In a server with workstation(s) environment, UNC path names should be used when specifying the Input Spoilage Data Files and Processed Spoilage Date Files Archive folders (see image below). Use the Browse... button to obtain the UNC path names for each. For more information on obtaining UNC path names, refer to [Appendix 1](#) in this Guide.

Click the **Next** button to continue;



4. The *Scan File Import* screen will display.





Select (check) the 'Enable Scan File Import' option **1** to activate this function (if not already selected).

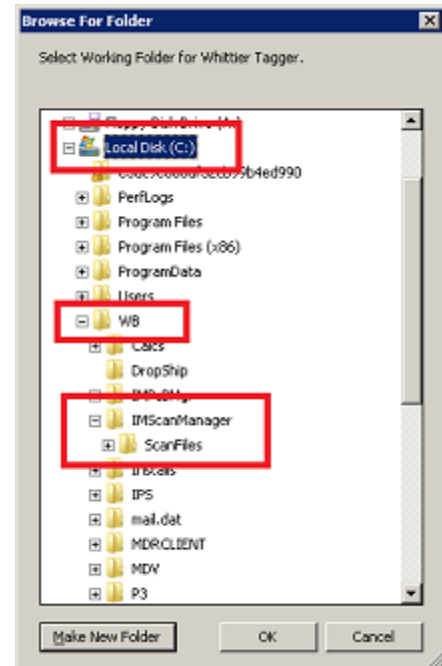
Determine the location where files will be staged prior to being imported into DAT-MAIL. This is a temporary directory which should be local to the computer that is running the Automation Scheduler and should be created within the 'WB' directory (refer to the image above). Create the 'Working Folder' **2** on the computer or server by clicking the corresponding **Browse...** button.




In a server with workstation(s) environment, the 'Working Folder' must be located on a shared directory for all workstations to have access to it. Window Book strongly recommends creating the 'Working Folder' under the "WB" directory.

A *Browse for Folder* dialog will display.

- Locate and select the 'WB' folder and click the **Make New Folder** button;
- Name the new folder 'IMScanManager';
- With the 'IMScanManager' folder selected, click the **Make New Folder** button again; and
- Name the new folder 'ScanFiles' and click the **OK** button to close the dialog.

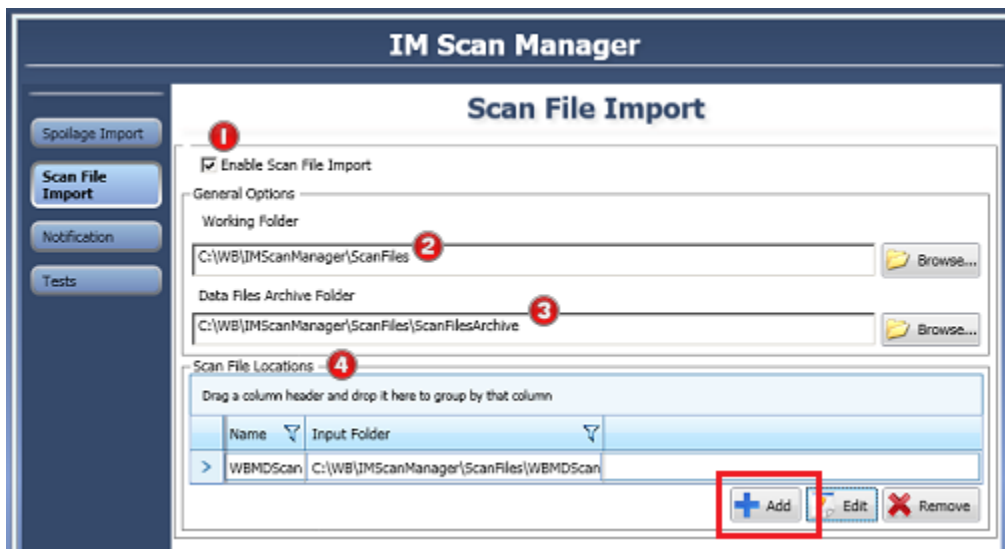
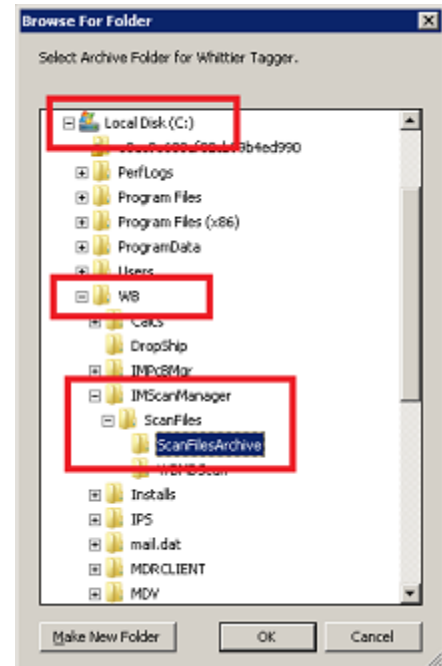


Create the 'Data Files Archive Folder' **3** on the computer or server by clicking the corresponding **Browse...** button. This is the folder where log files will be moved to once the data they contain is imported into DAT-MAIL.

 In a server with workstation(s) environment, the 'Data Files Archive Folder' must be located on a shared directory for all workstations to have access to it. Window Book strongly recommends creating the 'Data Files Archive Folder' under the "WB\IMScanManager\[Working Folder]" directory.

A *Browse for Folder* dialog will display.


- Locate and select the 'WB\IMScanManager' folder;
- Within the 'IMScanManager' folder, select (i.e. highlight) the 'ScanFiles' folder;
- With the 'ScanFiles' folder selected, click the **Make New Folder** button; and
- Name the new folder 'ScanFilesArchive' and click the **OK** button to close the dialog.



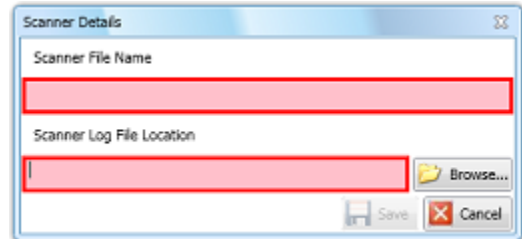
Lastly, specify the folder(s) where the scanner will be writing its log files to (i.e. 'Scan File Locations') ⁴. Create a folder for each scanner being used to be able to identify where the log files originated from. For easy correlation, a user should enter the same name that the scanner is called on the computer or server.


- Click the **+Add** button. A *Scanner Details* dialog will display.

Plug-In Setup & Configuration

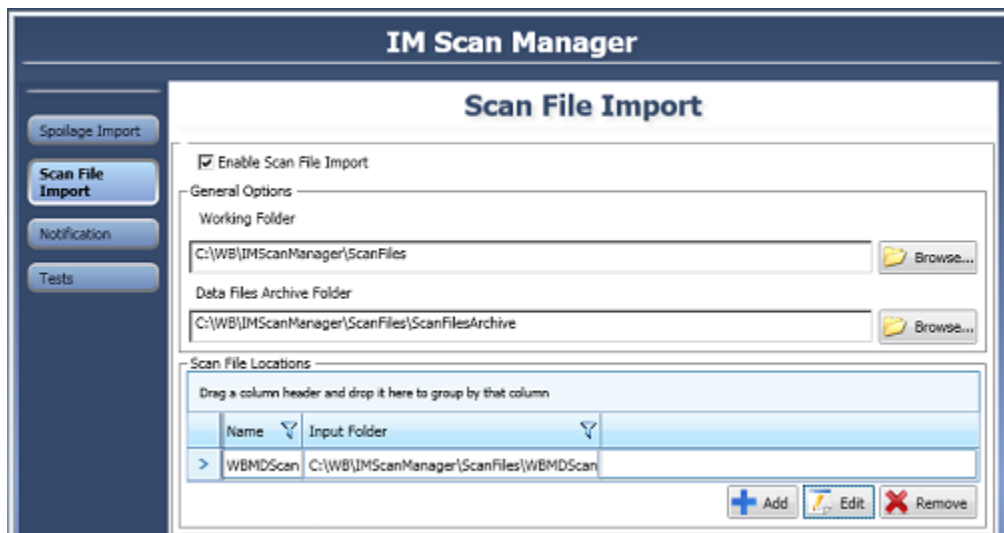
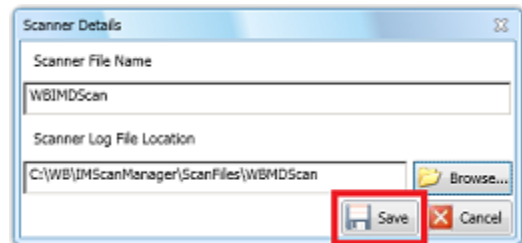
 ***In a server with workstation(s) environment, all ‘Scan File Locations’ must be located on a shared directory for all workstations to have access to them. Window Book strongly recommends creating all ‘Scan File Locations’ folders under the “WB\IMScanManager\[WorkingFolder]” directory.***

- Enter a ‘Scanner File Name’;
- Create/Select a ‘Scanner Log File Location’. This is where the scanner’s log files will be moved to prior to being imported or uploaded into DAT-MAIL. Click the **Browse...** button to navigate to the ‘ScanFiles’ folder created above. Create a sub-folder specific to the scanner application being used, and/or any other pertinent detail that allow a user to easily discern the origins of the log files. In the example here, Window Book’s MD Scan application is being used; therefore, the sub-folder created is named “WBIMDScan” (i.e. ‘\\...WB\IMScanManager\ScanFiles\WBIMDScan’); and



 ***If a Whittier Tagger is being used for scanning, Window Book recommends including the word “Whittier” or “Tagger” in the ‘Scanner File Name’ and ‘Scanner Log File Location’ fields/folders.***

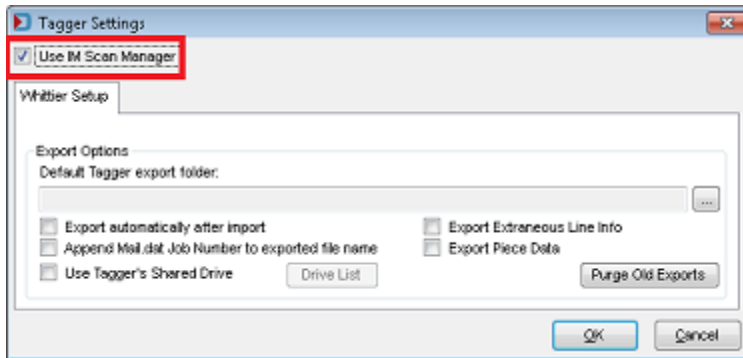
- Click the **Save** button;





If a Whittier Tagger is being used, once the IM Scan Manager Plug-in's 'Scan File Import' screen is set up, make sure to enable the feature within DAT-MAIL; specifically in the Tagger Settings screen (i.e. Other Programs > IM Scanning > Tagger Interface Setup). Select (check) the 'Use IM Scan Manager' option and click the OK button.

Click the **Next** button to continue;



5. The *Notification* screen will display. Using this feature, automatic notifications will be sent to a series of people via email and/or SMS text messaging when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure');



The setup and use of the Notification feature require the user to have the necessary information about their company's SMTP e-mail server. Consult your company's e-mail administrator to obtain the necessary SMTP information.



Enabling and configuring the Notification feature is not required for using the IM Scan Manager plug-in.

Plug-In Setup & Configuration

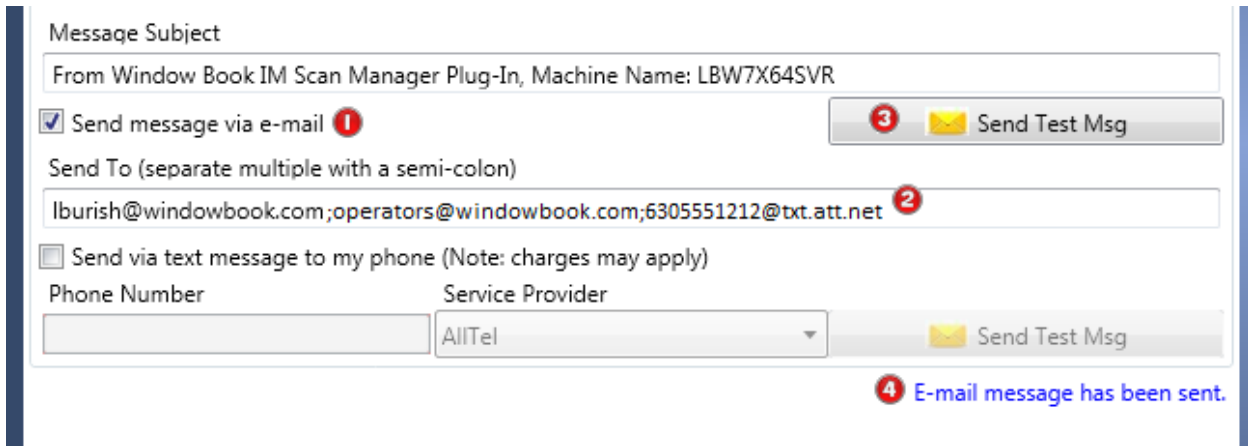
To enable and configure the Notification feature, do the following:

The screenshot shows the 'Notification' configuration page in the IM Scan Manager. The page is titled 'Notification' and has a sidebar with buttons for 'Spoilage Import', 'Scan File Import', 'Notification', and 'Tests'. The main content area is titled 'E-mail & Text Message Settings' and contains the following fields and options:

- Send on success** (checked) and **Send on failure** (checked) checkboxes.
- SMTP Host**: mail.windowbook.local
- SMTP Port**: 25
- SMTP User Name**: Iburish
- SMTP Password**: masked with asterisks
- Enable SSL** (unchecked) checkbox.
- Send From**: DONOTREPLY@windowbook.com
- Message Subject**: From Window Book IM Scan Manager Plug-In, Machine Name: LBW7X64SVR

- Select (check) the option to 'Send on success' and/or the option to 'Send on failure' **1**;
- SMTP Host: Enter the URL or IP address of the SMTP server **2**;
- SMTP Port: Enter the value of the SMTP port (most common port is 25, but it can be different) **3**;
- SMTP User Name and Password: Enter the username and password that is used to access the SMTP server **4**. They can be the user's own login and password; however, if the password changes, the information will have to be updated/changed here as well. One work-around would be to have the company's email administrator set up a dedicated user account for this purpose and be responsible for maintaining these credentials;
- Enable SSL: Only to be selected (checked) if the company's SMTP server requires SSL encryption **5**;
- Send From: This is the email address that will display as the Sender of the email notifications. Window Book encourages the use of a 'Do Not Reply' address as most times replies to these emails are unwanted (e.g. 'DoNotReply@<yourcompanydomain>.com') **6**;
- Message Subject: Use the default displayed or enter a subject that will command some attention **7**. Notifications are for events that require some sort of user attention. One example would be: "Attention Required!";

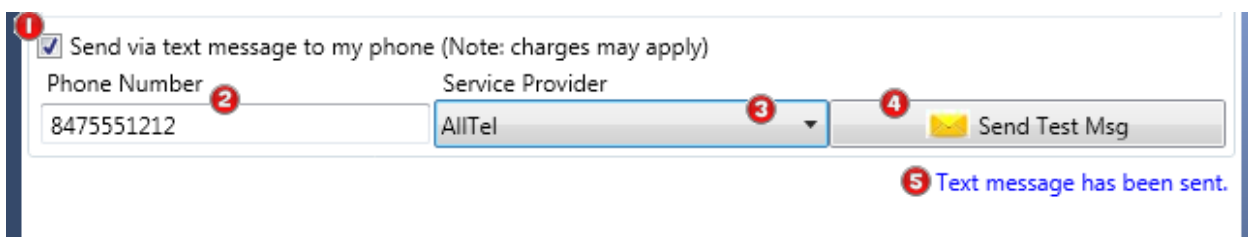
To set up notifications to be sent via email, do the following:



- Send Messages via Email: Select (check) the ‘Send message via email’ option (1);
- Send To: Enter the email address to send the notification(s) to. If entering more than one email address, separate the addresses using a semi-colon (no spaces). Group email addresses created in Outlook or whatever email tool the Client uses can also be entered (in the example here, a group email address of ‘Operators@windowbook.com’ is entered); as well as, text-to-email addresses for users’ cell phones (e.g. 6305551212@txt.att.net) (2);

When the email addresses have been entered, click the **Send Test Msg** button (3) to confirm that the notification is working properly. Each recipient will receive a test message in their email box or on their cell phone, depending on what type of email address was entered. A confirmation notification message will display on the screen when the notification was sent successfully (4);

To set up notifications to be sent via text message, do the following:



- Send Via Text Message (1): Select (check) the option to ‘Send via text message to my phone’;
- Phone Number (2): Enter the 10-digit phone number;
- Service Provider (3): Select the Service Provider from the drop-down list provided;
- When the phone number has been entered and the service provider selected, click the Send Test Msg button (4) to confirm the notification is working properly. The recipient will receive a test message on their cell phone. A confirmation notification message will display on the screen when the notification has been sent successfully (5);

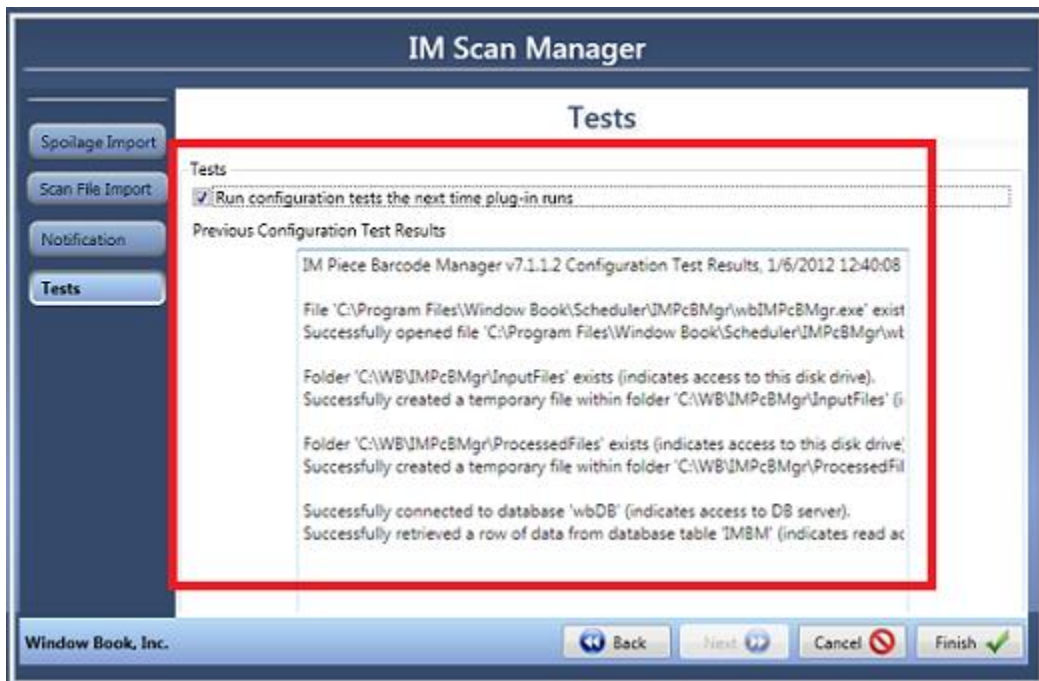
Plug-In Setup & Configuration

i Keep in mind that when using the option to send notifications via text messaging, standard text messaging rates may apply.

i Currently, users are only able to set up one text message recipient. This is a limitation that may be addressed in future releases of this product. Until that time, users can set up text notifications for multiple people by using the text-to-email address functionality discussed in [step 5](#) above.

Click the **Next** button to continue;

6. The *Tests* screen will display. Select (check) the option to 'Run configuration tests the next time plug-in runs'. When the test occurs, the test results will display in the 'Previous Configuration Test Results' window;



Click the **Finish** button. The configuration of the IM Scan Manager plug-in is complete! Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

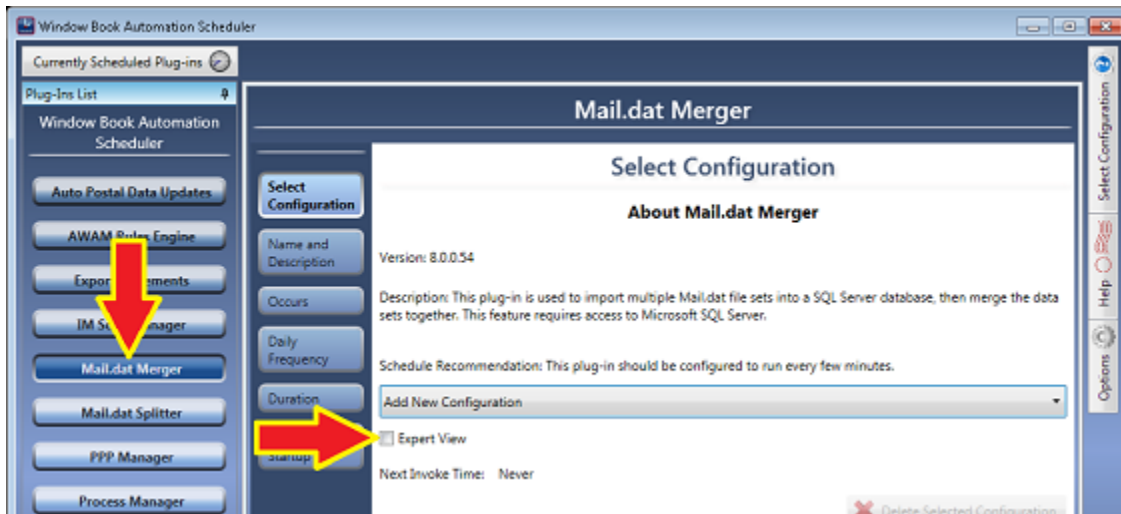
MAIL.DAT MERGER PLUG-IN

The Mail.dat Merger plug-in is used to run the 'wbMDMgr.exe' program which imports multiple Mail.dat file sets into an MS SQL Server database, merge them into a single data file set, and then export them to a single Mail.dat file. The exported Mail.dat file can then be imported by DAT-MAIL or any other post-presort software.

The plug-in also allows the Client to configure the pre-process merging of the Client's files before they are imported into DAT-MAIL.

To configure the Mail.dat Merger plug-in, do the following:

1. Click the **Mail.dat Merger** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



2. The *Expert View* screen will display. Enter a name specific to the configuration being created and specify when and how often the plug-in's process will run.

Plug-In Setup & Configuration

i *Window Book does not recommend enabling the function to 'Run at start-up' unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

Click the **Next** button to continue;

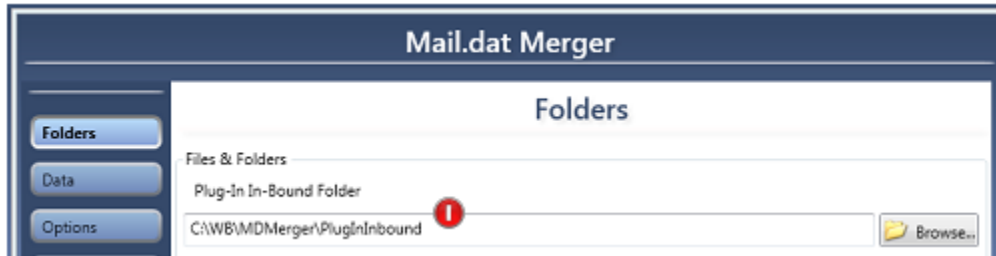
- The *Folders* screen will display. This screen requires the Client to create a series of folders that the plug-in process and the post pre-sort software will monitor.

If the Client uses DAT-MAIL, these folders should be created under the 'WB' folder on the computer or server, which is where DAT-MAIL's data folders reside, within a directory specific to the plug-in (e.g. "MDMerger").

i *If the Client does not use DAT-MAIL, then the folders can be created on the root directory of the computer or server; however, in a server with workstation(s) environment, these folders will need to be shared so that all workstations that have the post pre-sort software installed will have access to them.*

For the purpose of this Guide, it is assumed that DAT-MAIL is installed and being used. Complete the following in the *Folders* screen:

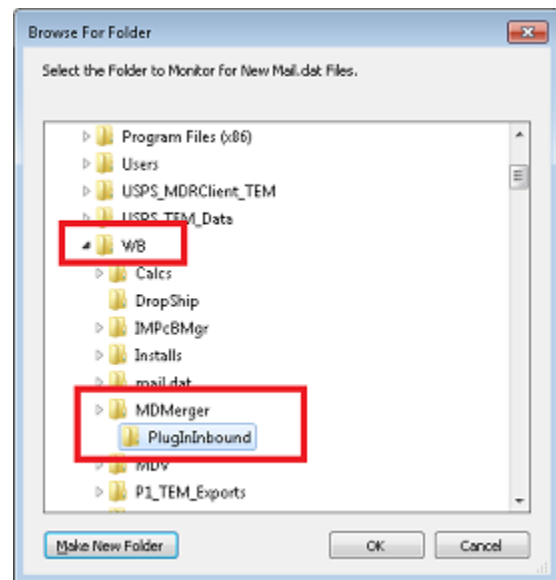
- **Plug-In In-Bound Folder 1**: This folder is where the Mail.dat files (in .zip file format) are placed that are to be merged. It is monitored by the plug-in.



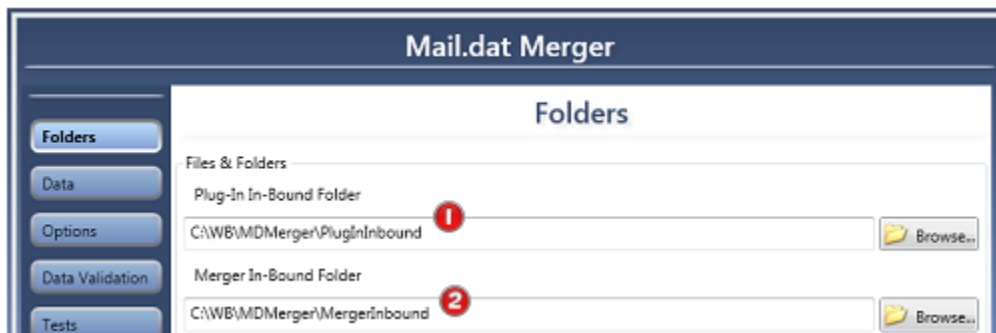
Click the corresponding **Browse...** button. A *Browse For Folder* dialog will display;

Locate and select the 'WB' folder on the computer or server and click the **Make New Folder** button. Name the new folder "MDMerger";

With the 'MDMerger' folder selected, click the **Make New Folder** button again to create a sub-folder under it. Name the sub-folder "PluginInbound". Click the **OK** button;



- **Merger In-Bound Folder 2**: .zip files found in the 'In-Bound' folder are moved to this 'Merger In-Bound' folder:

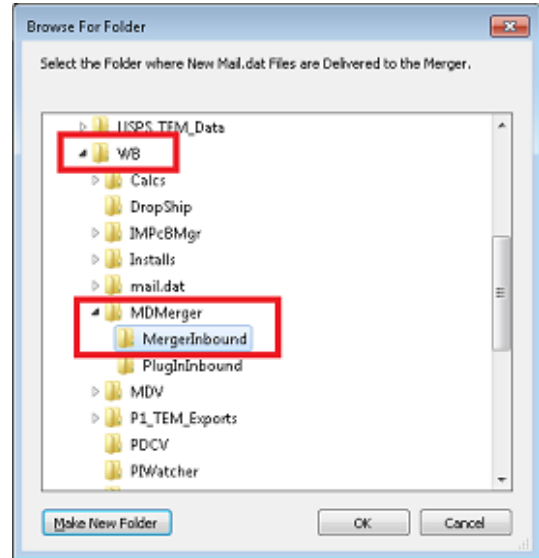


Plug-In Setup & Configuration

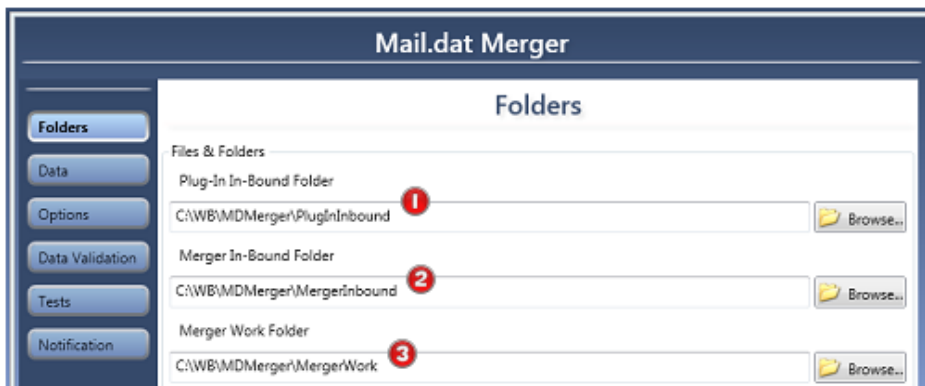
Click the corresponding **Browse...** button.
A *Browse for Folder* dialog will display;

Locate and select the
'WB\MDMerger' folder on the computer
or server. Click the **Make New Folder**
button and name the new folder
'MergerInbound';

Click the **OK** button;



- **Merger Work Folder** ³: .zip files found in the 'MergerInbound' folder are moved to this 'Merger Work Folder', at which time the functions selected or enabled in the *Options* screen are performed (go to [step 5](#) in this section for more information on the *Options* screen), and files are merged;

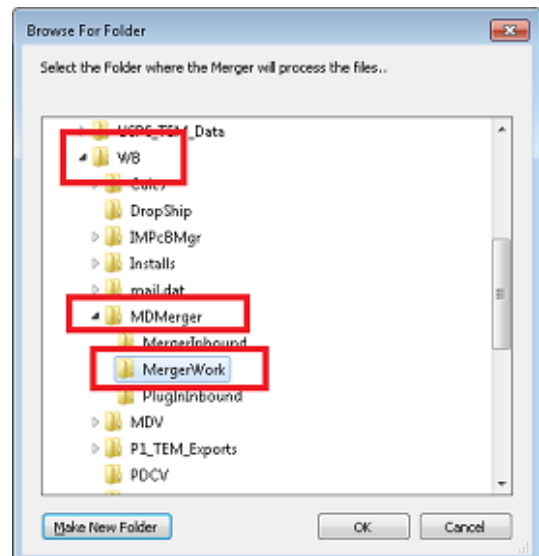


Click the corresponding **Browse...** button.
A *Browse for Folder* dialog will display.

Locate and select the 'WB\MDMerger'
folder on the computer or server.

Click the **Make New Folder** button and
name the new folder 'MergerWork'.

Click the **OK** button.



- **DAT-MAIL Import Folder** ⁴: When files are merged to create a file set in the 'Merger Work Folder', the .zipped file sets are moved to this DAT-MAIL Import Folder where they are picked up by the DAT-MAIL Daemon for importing into DAT-MAIL.



The default value for this folder is 'incoming'; however, the Client will have to create the 'incoming' folder if it is not already present (if this is the case, the file path field in the *Folders* screen will be shaded red in color);

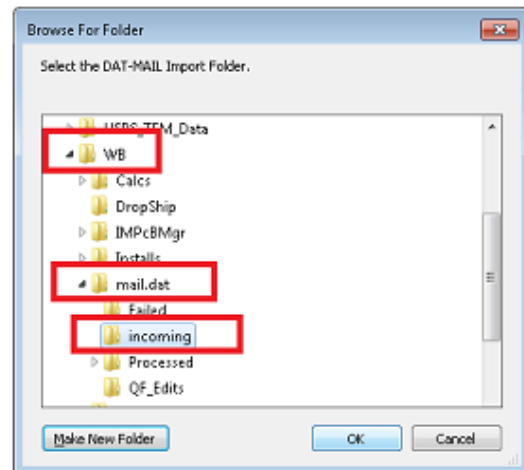


Click the corresponding **Browse...** button.
A *Browse for Folder* dialog will display.

Locate and select the 'WB\mail.dat' folder on the computer or server.

Click the **Make New Folder** button and name the new folder 'incoming'.

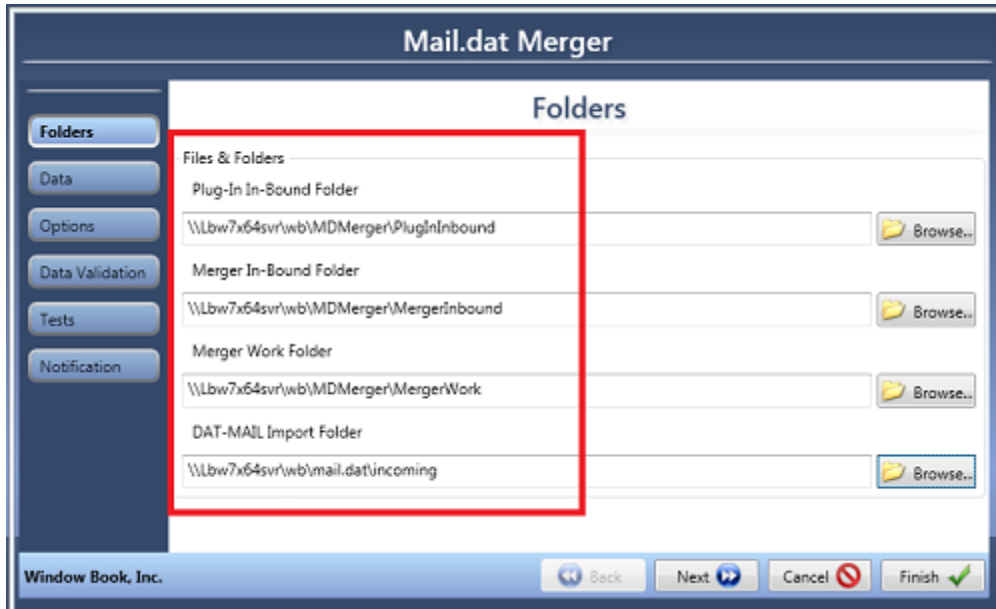
Click the **OK** button.



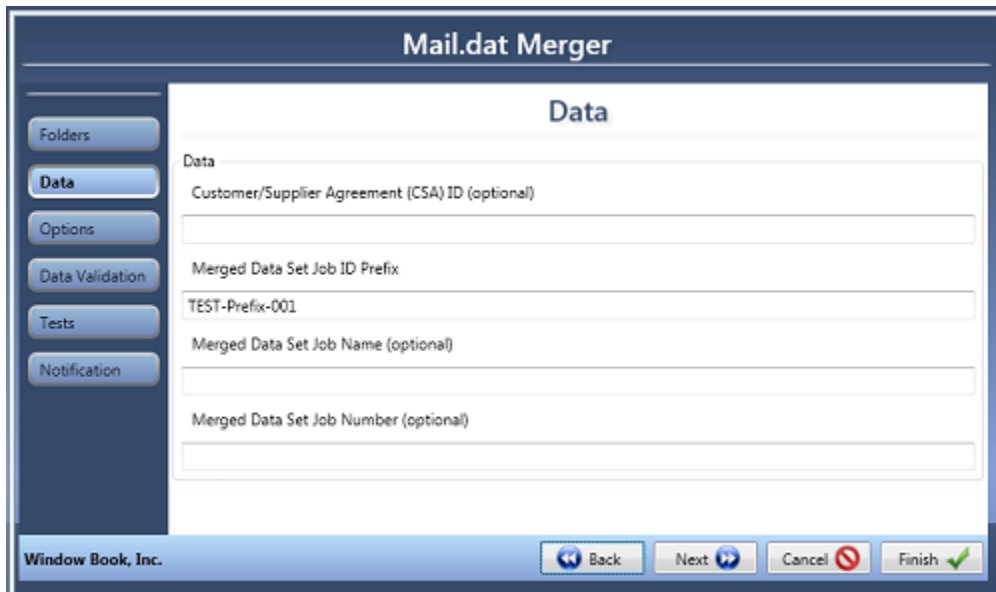
i In a server with workstation(s) environment, UNC path names should be used when specifying the Mail.dat Merger plug-in's file folders (see image below). For more information on obtaining UNC path names, refer to [Appendix 1](#) in this Guide.

Plug-In Setup & Configuration

When all of the data folders have been created and selected, click the **Next** button to continue;



4. The *Data* screen will display:



- **Customer/Supplier Agreement (CSA) ID (optional):** If a Client's presort software does not include their CSA ID in the Mail.dat Segment file, enter the CSA ID here. When a value is provided, the Mail.dat Merger plug-in will include it in the merged Mail.dat Segment files.
- **Merged Data Set Job ID Prefix:** Enter text that will be included as a prefix to the merged name portion of the merged Mail.dat file names (e.g. "TEST-Prefix-001"). This field is required.
- **Merged Data Set Job Name (optional):** This is an optional field and can remain blank.

- **Merged Data Set Job Number (optional):** This is an optional field and can remain blank.

Click the **Next** button to continue;

5. The *Options* screen will display. The options screen contains options or functions that can be applied to the merged Mail.dat file sets. The available options are listed below with a brief description for each;



- **Enable Plug-in Logging:** Select (check) this option to enable message logging to the Window Event log. This option is typically checked for technical support purposes only.
- **Drop Database on Complete:** Select (check) this option to remove the temporary SQL Server database after processing has successfully finished.
- **Drop Database on Failure:** Select (check) this option to remove the temporary SQL Server database after processing has unsuccessfully finished.
- **Shrink Database on Complete:** Select (check) this option to shrink the size of the temporary SQL Server database after processing has finished.
- **Use Auditing:** Select (check) this option to enable message logging to the SQL Server database.
- **Use Single Merge Database:** Select (check) this option to merge SQL Server databases.
- **Combine Segments:** Select (check) this option to combine file segments.

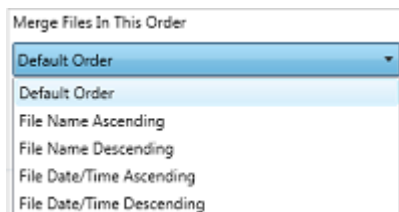
Plug-In Setup & Configuration

- **Number of Days to Keep Log Files:** Enter a value representing the number of days the Mail.dat Merger plug-in will keep the log files generated by the MDR Client which are read by the plug-in. The number of these log files can become quite large and slow processing down. The default retention period for log files is 7 days.
- **Generate PBC from PDR data:** Select (check) this option to generate PBC from the PDR data.
- **Keep PDR when generating PBC:** Select (check) this option to keep PDR when generating PBC.
- **Renumber PDR Piece IDs:** Select (check) this option to have the merge renumber the merged PDR and /or MIR piece ID numbers to start at 1 and be unique across all merged jobs.

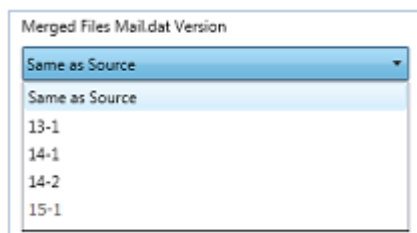


Be advised that for large jobs, a substantial amount of additional memory is used by the Mail.dat Merger plug-in when piece ID re-numbering is turned on.

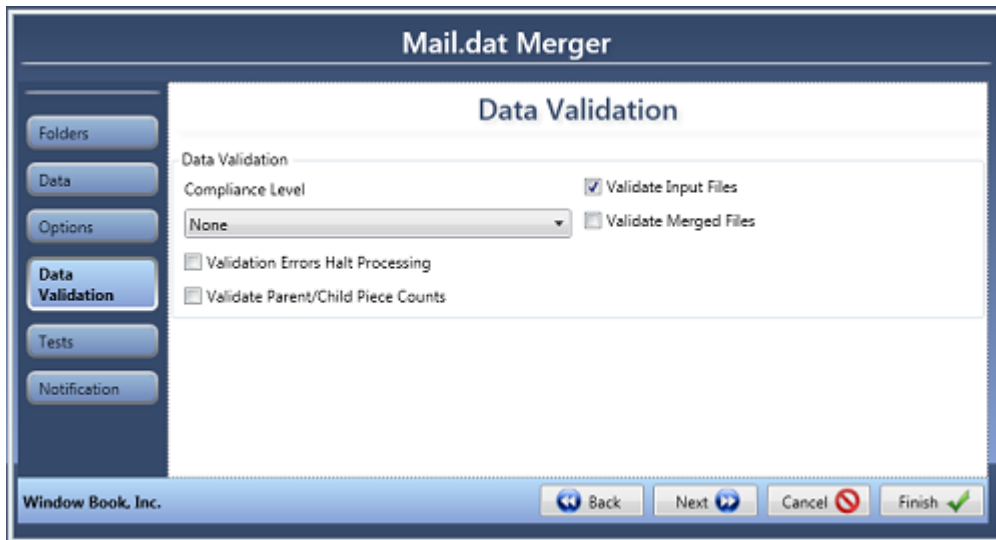
- **Update Redirected Postal Facilities:** Select (check) this option to enable updating the redirected postal facilities.
- **Keep Original Segment IDs:** Select (check) this option to keep original segment IDs.
- **Merge MLOCR Logical Trays:** Select (check) this option to merge MLOCR logical trays.
- **Delete Mother Pallets:** Select (check) this option to enable to delete mother pallets. Select (check) what type(s) to delete mother pallets for: All; DNDC/DASF; DSCF; Mxd ADC; or Mxd NDC.
- **Merge Files In This Order:** Specify in what order the files are merged by selecting one of the available options in the drop down. The 'Default Order' pertains to merging the input files based on file size descending. The other available options are: File Name Ascending; File Name Descending; File Date/Time Ascending; and File Date/Time Descending.



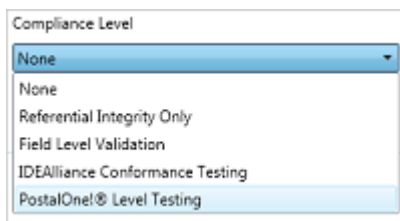
- **Merged Files Mail.dat Version:** Select the version number the merged Mail.dat file set should be merged in. Click the **Next** button to continue;



6. The *Data Validation* screen will display;



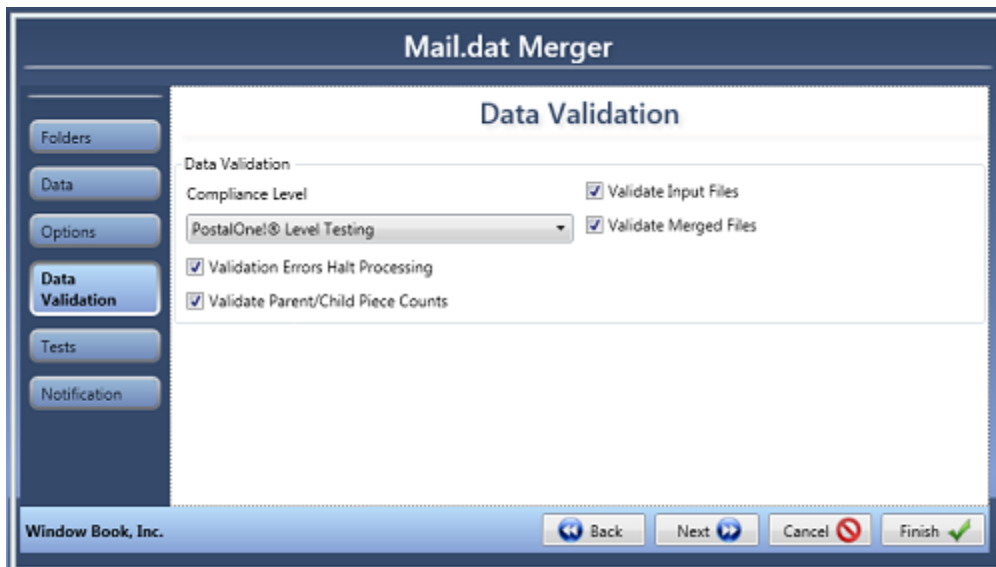
- **Compliance Level:** Select the compliance validation to be done on the Mail.dat data from the drop down provided. Options are:



- **None:** No compliance validation is done on the Mail.dat data;
- **Referential Integrity Only:** Record counts as reported in the HDR fields are checked against other files;
- **Field Level Validation:** Basic field content checks (in addition to Referential Integrity checks) including justification. For example, numeric fields should only contain number characters;
- **IDEAlliance Conformance Testing:** In addition to performing the Field Level Validation checking, the fields are evaluated based upon values that are generally known to be valid for these fields (e.g. HDR PQT File Status should be one of: O, D, R, N, C, U). The validation may take into consideration other related values. For example, to determine the list of valid zones for CQT Zone, one needs to consider Class Defining Preparation, and it is Periodicals, then we also need to know the CQT 3 Digit / 5 Digit Container divisions and also the CQT Not County/In County indicator. Required fields are also checked to make sure they are not omitted; and
- **PostalOne!® Level Testing:** *PostalOne!* requires additional fields to be required. The IDEAlliance Conformance tests are performed and additional fields for *PostalOne!* are added into the required or not list (e.g. PDR Move Update Method).

Plug-In Setup & Configuration

- **Validation Errors Halt Processing:** Select (check) this option to have the merger processing stop after validation errors are encountered.
- **Validate Parent/Child Piece Counts:** Select (check) this option to have the merger validate that child aggregate piece counts match the parent piece count (e.g. aggregate CQT piece count matches parent CSM piece count).
- **Validate Input Files:** Select (check) this option to have the merger validate the source Mail.dat files.
- **Validate Merged Files:** Select (check) this option to have the merger validate the merged Mail.dat output files.



Click the **Next** button to continue;

- The *Tests* screen will display. Select (check) the option to 'Run configuration tests the next time plug-in runs' (optional). The test results from the previous test run will display in the 'Previous Configuration Test Results' window. Click the **Next** button to continue;



- The *Notification* screen will display. Using this feature, automatic notifications will be sent to a series of people via email and/or SMS text messaging when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').

i *The setup and use of the Notification feature require the user to have the necessary information about their company's SMTP e-mail server. Consult your company's e-mail administrator to obtain the necessary SMTP information.*

i *Enabling and configuring the Notification feature is not required for using the Mail.dat Merger plug-in.*

Plug-In Setup & Configuration

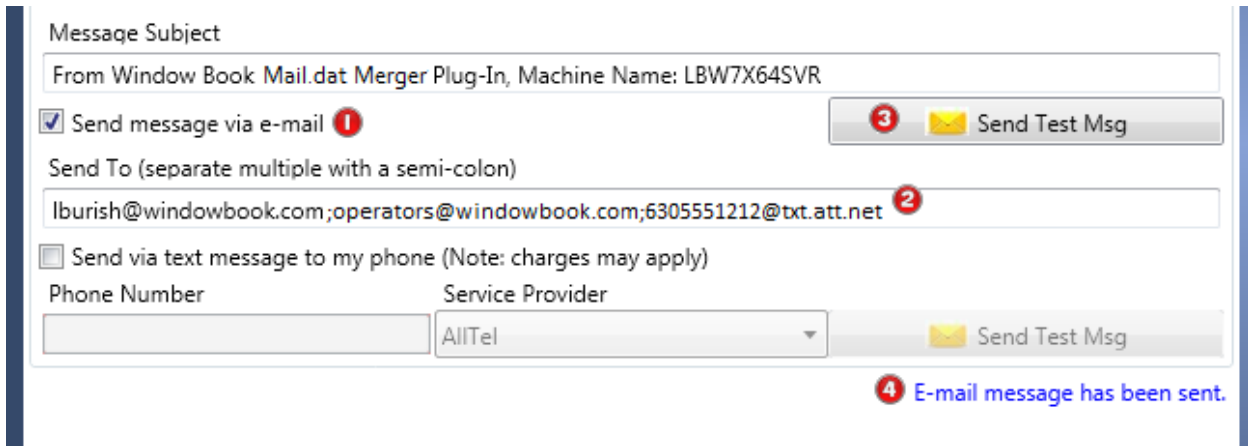
To enable and configure the Notification feature, do the following:

The screenshot shows the 'Mail.dat Merger' application window with the 'Notification' tab selected. The configuration fields are as follows:

Field	Value
SMTP Host	mail.windowbook.local
SMTP Port	25
SMTP User Name	lburish
SMTP Password	*****
Send From	DONOTREPLY@windowbook.com
Message Subject	From Window Book Mail.dat Merger Plug-In, Machine Name: LBW7X64SVR

- Select (check) the option to 'Send on success' and/or the option to 'Send on failure' **1**;
- **SMTP Host:** Enter the URL or IP address of the SMTP server **2**;
- **SMTP Port:** Enter the value of the SMTP port (most common port is 25, but it can be different) **3**;
- **SMTP User Name and Password:** Enter the username and password that is used to access the SMTP server **4**. They can be the user's own login and password; however, if the password changes, the information will have to be updated/changed here as well. One work-around would be to have the company's email administrator set up a dedicated user account for this purpose and be responsible for maintaining these credentials;
- **Enable SSL:** Only to be selected (checked) if the company's SMTP server requires SSL encryption **5**;
- **Send From:** This is the email address that will display as the Sender of the email notifications. Window Book encourages the use of a 'Do Not Reply' address as most times replies to these emails are unwanted (e.g. 'DoNotReply@<yourcompanydomain>.com') **6**; and
- **Message Subject:** Use the default displayed or enter a subject that will command some attention **7**. Notifications are for events that require some sort of user attention. One example would be: "Attention Required!".

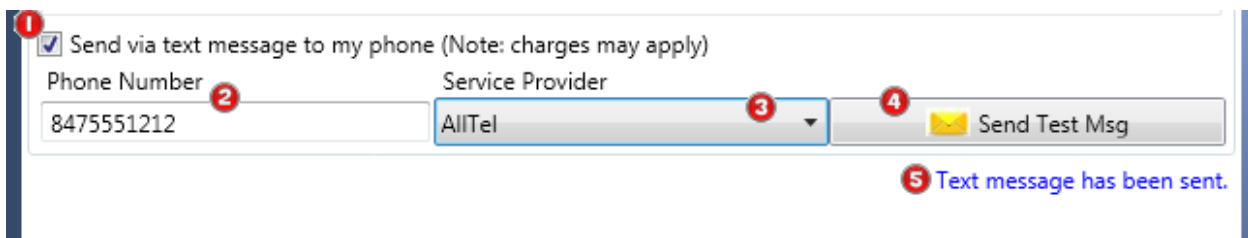
To set up notifications to be sent via email, do the following:



- **Send Messages via Email:** Select (check) the ‘Sent message via email’ option (1); and
- **Send To:** Enter the email address to send the notification(s) to. If entering more than one email address, separate the addresses using a semi-colon (no spaces). Group email addresses created in Outlook or whatever email tool the Client uses can also be entered (in the example here, a group email address of ‘Operators@windowbook.com’ is entered); as well as, text-to-email addresses for users’ cell phones (e.g. 6305551212@txt.att.net) (2).

When the email addresses have been entered, click the **Send Test Msg** button (3) to confirm that the notification is working properly. Each recipient will receive a test message in their email box or on their cell phone, depending on what type of email address was entered. A confirmation notification message will display on the screen when the notification was sent successfully (4).

To set up notifications to be sent via text message, do the following:



- **Send Via Text Message:** Select (check) the option to ‘Send via text message to my phone’ (1);
- **Phone Number:** Enter the 10-digit phone number (2); and
- **Service Provider:** Select the Service Provider from the drop-down list provided (3).

When the phone number has been entered and the service provider selected, click the **Send Test Msg** button (4) to confirm the notification is working properly. The recipient will receive a test message on their cell phone. A confirmation notification message will display on the screen when the notification has been sent successfully (5).

Plug-In Setup & Configuration

i *Keep in mind that when using the option to send notifications via text messaging, standard text messaging rates may apply.*

i *Currently, users are only able to set up one text message recipient. This is a limitation that may be addressed in future releases of this product. Until that time, users can set up text notifications for multiple people by using the text-to-email address functionality discussed in [step 8](#) above.*

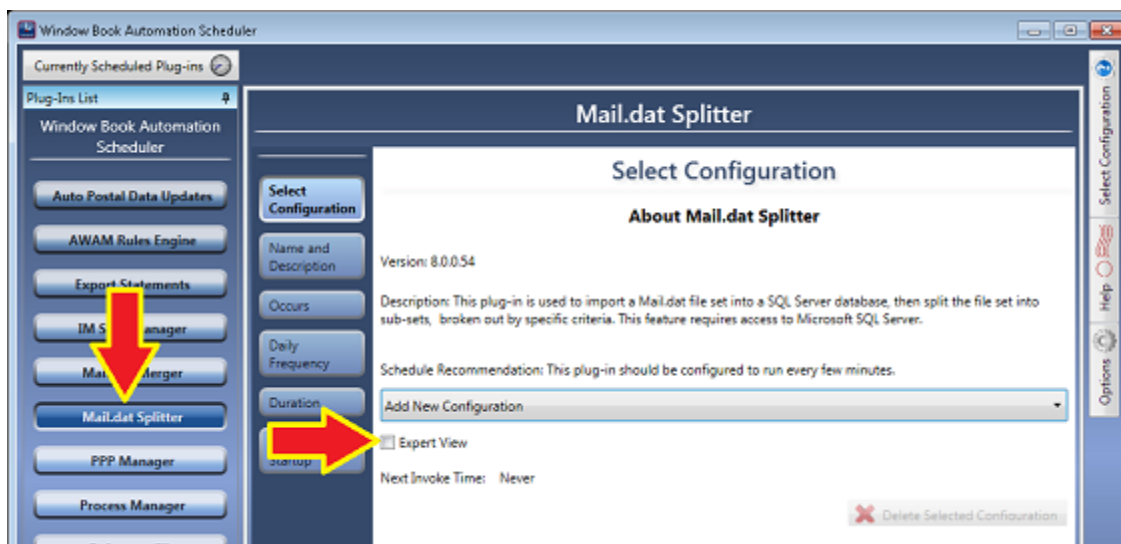
Click the **Finish** button. The configuration of the Mail.dat Merger plug-in is complete! Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

MAIL.DAT SPLITTER PLUG-IN

The Mail.dat Splitter plug-in is used to run the 'wbMDMgr.exe' program which imports Mail.dat files into an MS SQL Server database, which can then be split into multiple Mail.dat file sets according to specified criteria and exported for use. The exported Mail.dat file sets can then be imported by DAT-MAIL or any other post-presort software. The plug-in also allows the Client to configure the pre-process splitting of the Client's Mail.dat files before they are imported into DAT-MAIL.

To configure the Mail.dat Merger plug-in, do the following:

1. Click the **Mail.dat Splitter** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



2. The *Expert View* screen will display. Enter a name specific to the configuration being created and specify when and how often the plug-in's process will run.

i *Window Book does not recommend enabling the function to 'Run at start-up' unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation*

Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.

Click the **Next** button to continue;

The screenshot shows the 'Mail.dat Splitter' configuration window in 'Expert View'. The window has a dark blue header with the title 'Mail.dat Splitter' and a sub-header 'Expert View'. On the left side, there are two buttons: 'Select Configuration' and 'Expert View'. The main area contains the following fields and options:

- Name:** Mail.dat Splitter
- Description:** This plug-in should be configured to run every few minutes.
- Frequency:** Radio buttons for 'Daily', 'Weekly', and 'Monthly'. 'Daily' is selected. Below 'Daily' is a 'Recurs Every:' field with a spinner set to '1' and the unit 'Day(s)'.
- Occurrence:** Radio buttons for 'Occurs Once At' and 'Occurs Every'. 'Occurs Every' is selected. Below it are fields for 'Starting At' (12:00 AM) and 'Ending At' (11:59 PM).
- Start Date:** Thursday, May 14, 2015
- End Date:** Radio buttons for 'End Date' and 'No End Date'. 'No End Date' is selected.
- Retries:** 'Retries Count' is 0 and 'Retry Seconds' is 300. There is a checkbox for 'Run at start-up' which is unchecked.

At the bottom of the window, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'. The 'Next' button is highlighted with a blue arrow. The bottom left corner of the window says 'Window Book, Inc.' and the bottom right corner has a green checkmark next to the 'Finish' button.

3. The *Folders* screen will display. This screen requires the Client to create a series of folders that the plug-in process and the post pre-sort software will monitor.

If the Client uses DAT-MAIL, these folders should be created under the 'WB' folder on the computer or server, which is where DAT-MAIL's data folders reside, within a directory specific to the plug-in (e.g. "MDSplitter").

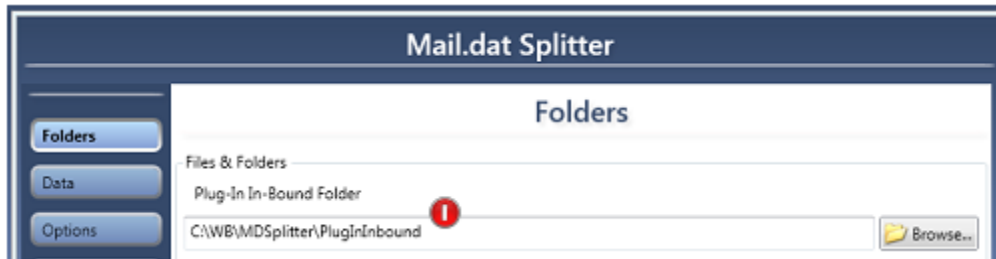
i ***If the Client does not use DAT-MAIL, then the folders can be created on the root directory of the computer or server; however, in a server with workstation(s) environment, these folders will need to be shared so that all workstations that have the post pre-sort software installed will have access to them.***

For the purposes of this Guide, it is assumed that DAT-MAIL is installed and being used.

Plug-In Setup & Configuration

Complete the following in the *Folders* screen:

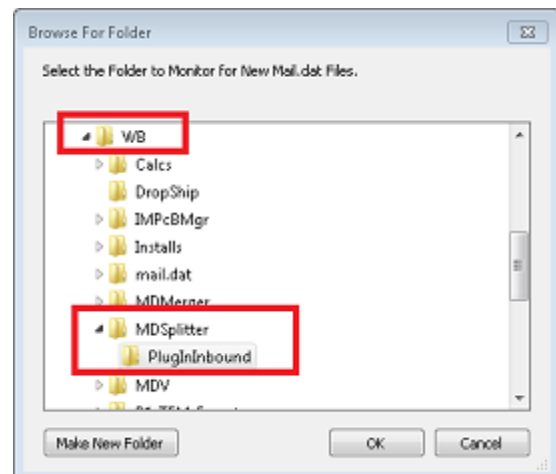
- Plug-In In-Bound Folder **1**: This folder is where the Mail.dat files (in .zip file format) are placed. It is monitored by the plug-in;



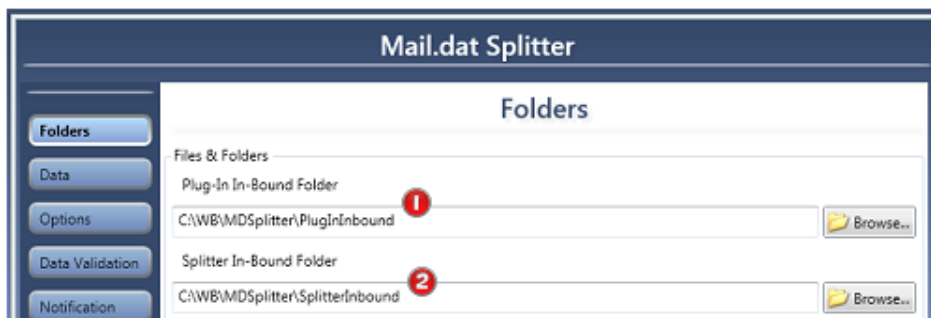
Click the corresponding **Browse...** button. A *Browse For Folder* dialog will display;

Locate and select the 'WB' folder on the computer or server and click the **Make New Folder** button. Name the new folder "MDSplitter"; and

With the 'MDSplitter' folder selected, click the **Make New Folder** button again to create a sub-folder under it. Name the sub-folder "PluginInbound". Click the **OK** button.



- Splitter In-Bound Folder **2**: .zip files found in the 'PluginInBound' folder are moved to this 'SplitterInBound' folder. After moving them, the plug-in unzips them and begins processing the individual Mail.dat files. If processing fails, the source Mail.dat zip file is moved to a 'Rejected' sub-folder that is automatically created by the plug-in (i.e. '...\SplitterInbound\Rejected').

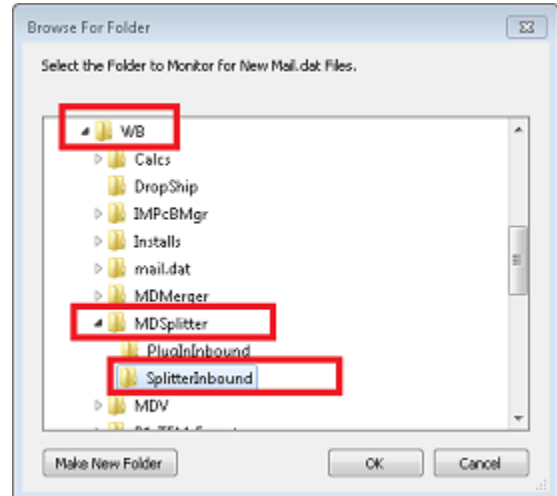


Click the corresponding **Browse...** button.

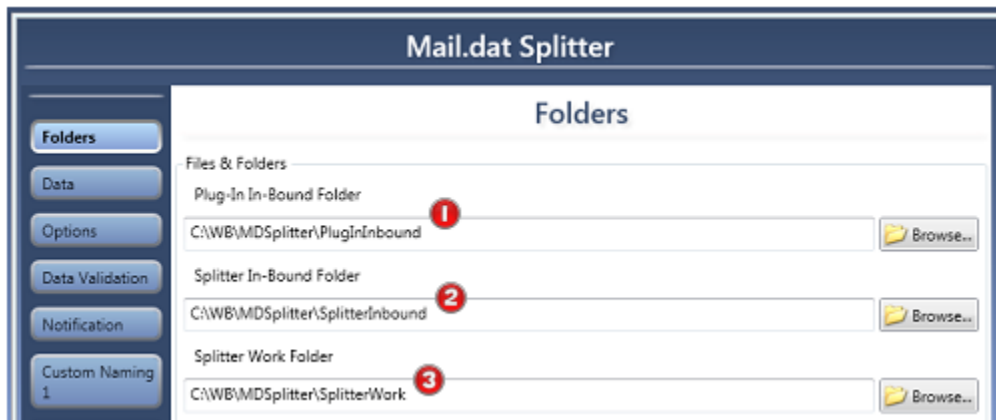
A *Browse for Folder* dialog will display. Locate and select the 'WB\MDSplitter' folder on the computer or server;

Click the **Make New Folder** button and name the new folder 'SplitterInbound'.

Click the **OK** button;



- Splitter Work Folder ³: When processing is successful, files found in the 'SplitterInbound' folder are moved to this 'Splitter Work Folder', at which time the functions selected or enabled in the *Options* screen are performed (go to [step 5](#) in this section for more information on the *Options* screen), and files are split.

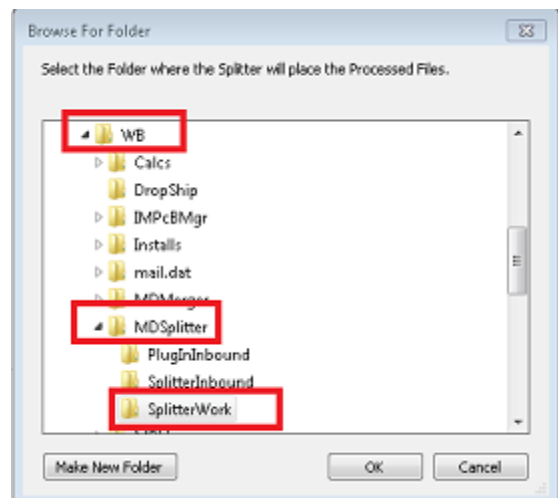


Click the corresponding **Browse...** button. A *Browse for Folder* dialog will display.

Locate and select the 'WB\MDSplitter' folder on the computer or server.

Click the **Make New Folder** button and name the new folder 'SplitterWork'.

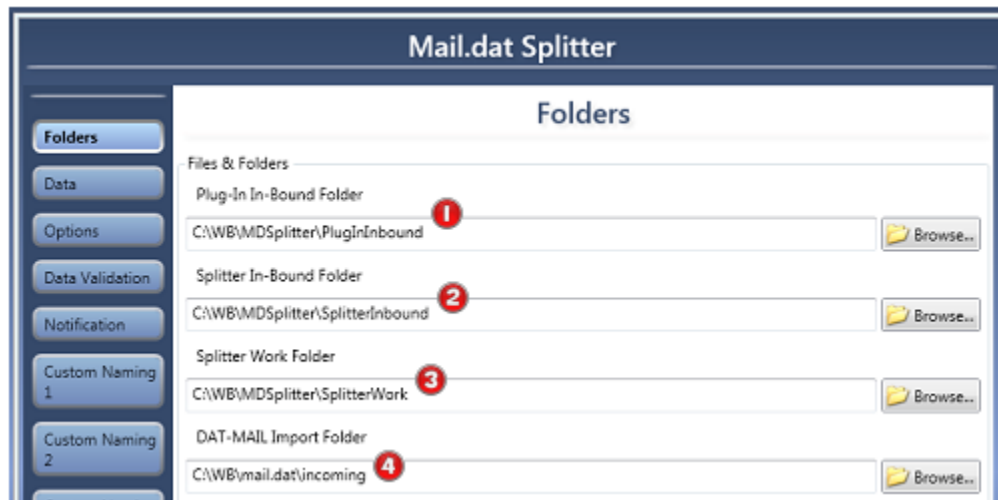
Click the **OK** button;



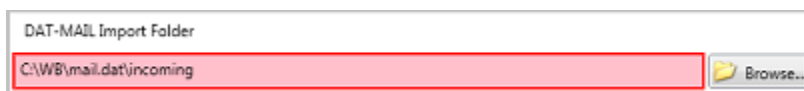
Plug-In Setup & Configuration

At this time split files, depending on how they are split, are moved to the folder specified for importing into DAT-MAIL (e.g. '\\...WB\mail.dat\incoming') or whatever post-presort software is being used (refer to the *Options* screen discussed under [step 5](#) in this section, specifically the information provided on the 'Split Process' feature). For example, if 'Auto-Non-Auto' was selected for the Split Process type, the Auto file will be moved to the '\\...WB\mail.dat\incoming' folder, and the Non-Auto file will be moved to the 'NonAutoArchive' folder (i.e. '\\...WB\mail.dat\incoming\NonAutoArchive');

- DAT-MAIL Import Folder **4**: When files are split in the 'Splitter Work Folder', the .zipped file, depending on how they are split, are moved to the folder specified for importing into DAT-MAIL (e.g. '\\...WB\mail.dat\incoming') where they are picked up by the DAT-MAIL Daemon for importing into DAT-MAIL.



The default value for this folder is 'incoming'; however, the Client will have to create the 'incoming' folder if it is not already present (if this is the case, the file path field in the *Folders* screen will be shaded red in color);

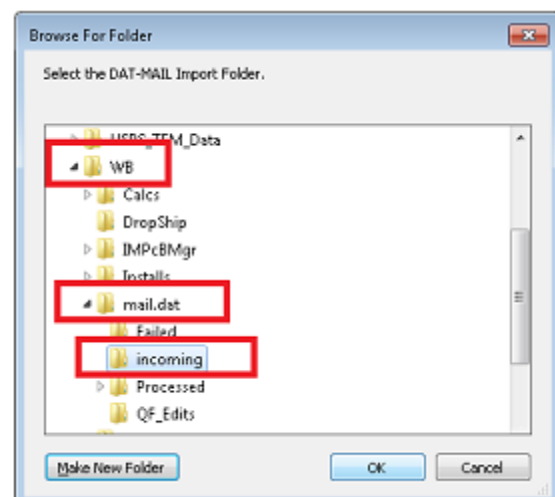


Click the corresponding **Browse...** button.
A *Browse for Folder* dialog will display;

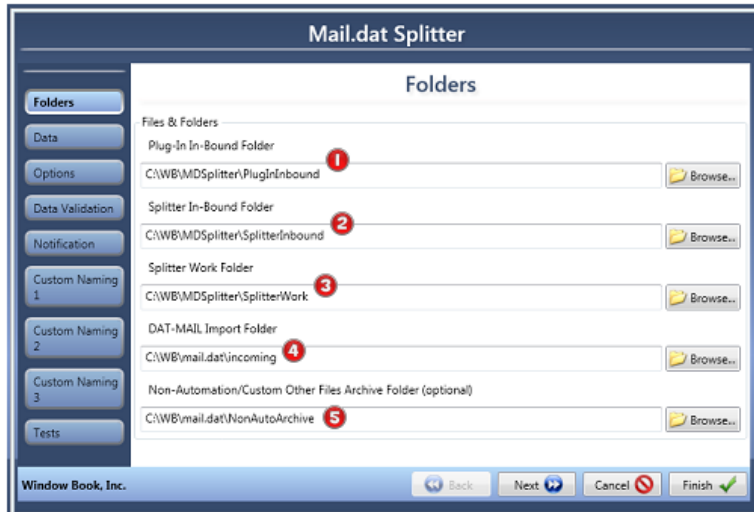
Locate and select the 'WB\mail.dat' folder
on the computer or server;

Click the **Make New Folder** button and
name the new folder 'incoming'.

Click the **OK** button;

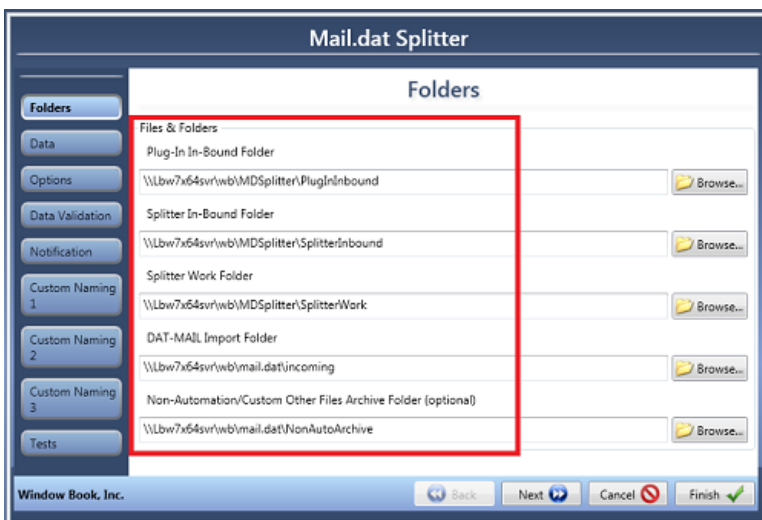


- Non-Automation/Custom Other Files Archive Folder (optional) **5**: Create a folder for non-automation files, Auto/Non-Auto Split type, Non5D split files, the Custom Other files, or the Custom Tray Level split type files to separate them from the automation split files (e.g. '\\...WB\mail.dat\NonAutoArchive').



i Refer to the Options screen discussed under [step 5](#) in this section, specifically the information provided on the 'Split Process' feature for information on how files are split and how they will be identified. For example, if 'Auto-Non-Auto' was selected for the Split Process type, the Auto file will be moved to the '\\...WB\mail.dat\incoming' folder, and the Non-Auto file will be moved to the 'NonAutoArchive' folder (i.e. '\\...WB\mail.dat\incoming\NonAutoArchive');

i In a server with workstation(s) environment, UNC path names should be used when specifying the Mail.dat Splitter plug-in's file folders (see image below). For more information on obtaining UNC path names, refer to [Appendix 1](#) in this Guide.



When all of the data folders have been created and selected, click the **Next** button to continue;

Plug-In Setup & Configuration

- The *Data* screen will display. If a Client's pre-sort software does not include their Customer/Supplier Agreement (CSA) ID in the Mail.dat Segment file, it can be entered in the 'Customer/Supplier Agreement (CSA) ID (optional)' field. The Mail.dat Splitter plug-in will include it in the split Mail.dat Segment (SEG) files. Click the **Next** button to continue;

The screenshot shows the 'Mail.dat Splitter' application window with the 'Data' tab selected. The left sidebar contains buttons for 'Folders', 'Data', 'Options', 'Data Validation', 'Notification', 'Custom Naming 1', and 'Custom Naming'. The main area is titled 'Data' and contains a text input field labeled 'Customer/Supplier Agreement (CSA) ID (optional)'.

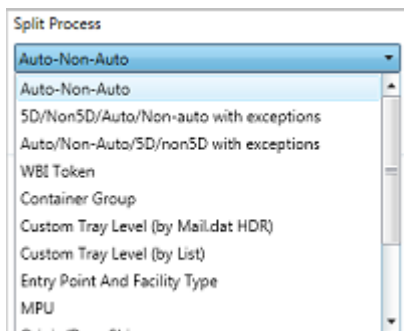
- The *Options* screen will display. The options screen contains options or functions that can be applied to the split Mail.dat files. Also, how a file should be split and what Mail.dat version should be applied to split files is specified from this screen. How a file should be split dictates how the split file will be identified (i.e. file name). The available options are listed below with a brief description for each;

The screenshot shows the 'Mail.dat Splitter' application window with the 'Options' tab selected. The left sidebar contains buttons for 'Folders', 'Data', 'Options', 'Data Validation', 'Notification', 'Custom Naming 1', 'Custom Naming 2', 'Custom Naming 3', and 'Tests'. The main area is titled 'Options' and contains several sections of settings:

- Processing Options:**
 - Enable Plug-In Logging
 - Drop Database on Complete
 - Drop Database on Failure
 - Shrink Database on Complete
 - Use Auditing
 - Use Original File Name
 - Use Job Number
 - Number of Days to Keep Log Files:
 - Split Process:
 - Split Files Mail.dat Version:
- Generate PBC from PDR data:**
 - Generate PBC from PDR data
 - Keep PDR when generating PBC
 - Update Redirected Postal Facilities
- Delete Mother Pallets:**
 - All
 - DNDC/DASF
 - DSCF
 - Mxd ADC
 - Mxd NDC

At the bottom of the window, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'.

- **Enable Plug-in Logging:** Select (check) this option to enable message logging to the Window Event log. This option is typically checked for technical support purposes only;
- **Drop Database on Complete:** Select (check) this option to remove the temporary SQL Server database after processing has successfully finished;
- **Drop Database on Failure:** Select (check) this option to remove the temporary SQL Server database after processing has unsuccessfully finished;
- **Shrink Database on Complete:** Select (check) this option to shrink the size of the temporary SQL Server database after processing has finished;
- **Use Auditing:** Select (check) this option to enable message logging to the SQL Server database;
- **Use Original File Name:** Select (check) this option to prefix the split Mail.dat file names with the name of the source Mail.dat zip file;
- **Use Job Number:** Select (check) this option to prefix the split Mail.dat file names with the job number of the source Mail.dat zip file;
- **Generate PBC from PDR data:** Select (check) this option to have the Splitter plug-in generate a PBC file using PDR and other data;
- **Keep PDR when generating PBC:** Select (check) this option to keep PDR when generating PBC;
- **Update Redirected Postal Facilities:** Select (check) this option to enable updating the redirected postal facilities;
- **Delete Mother Pallets:** Select (check) this option to enable to delete mother pallets. Select (check) what type(s) to delete mother pallets for: All; DNDC/DASF; DSCF; Mxd ADC; or Mxd NDC;
- **Number of Days to Keep Log Files:** Enter a value representing the number of days the Mail.dat Splitter plug-in will keep the log files generated by the MDR Client which are read by the plug-in. The number of these log files can become quite large and slow processing down. The default retention period for log files is 7 days;
- **Split Process:** Select how the file(s) should be split. Split options are:



- **Auto-Non-Auto:** Default Split Process option. Split source files into Automation trays and non-automation trays. Split name is "Auto" for files containing automation trays and "NonAuto" for files containing non-automation trays;

Plug-In Setup & Configuration



“Split name” refers to the file name of the split file. This is true for all of the available the splitter options.

- **5D/Non5D/Auto/Non-Auto with exceptions:** Used for Clients who want to split out mail that would be sent to a commingler from mail the commingler could not add value to. Ordinarily this would mean keeping the 5-digit mail and giving the commingler everything else (Non-5-digit or N5D). This option accomplishes this split.

When this option is selected, the screen updates to display a field to ‘Enter Container level values’, which is auto populated with the default container values, but they can be changed by the user, if need be. The CSM container level values are used to identify the trays for commail/commingle.

If this split option is selected, an exception list is created using a “wbMDAutomation.xml” file to identify excluded jobs (i.e. the exception list determines which customers get the Auto/Non-Auto split or are not split at all) that is saved in the [Plug-in In-Bound folder](#) along with the Mail.dat zip file. Jobs to be split using the alternate process (i.e. Auto/Non-Auto) and/or not split at all are identified by client or customer. The user defines who the clients or customers are in the .xml file.

When the 5D split is used, the files are named using the following format: “5D-
<originalfilename>”. When the Non5D split is used, the files are named using the following format: “Non5D-
<originalfilename>”. Non5D files are saved to the [Non-Automation/Custom Other Files Folder](#). 5D files are saved to the normal output folder.

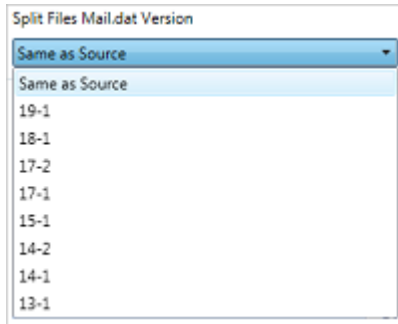
- **Auto/Non-Auto/5D/non5D with exceptions:** Used by Clients who have customers who want them to mail all automation mail and give on the non-auto mail to the commingler (i.e. Auto/Non-Auto).

When this option is selected, the screen updates to display a field to ‘Enter Container level values’, which is auto populated with the default container values, but they can be changed by the user, if need be. The CSM container level values are used to identify the trays for commail/commingle.

If this split option is selected, an exception list is created using a “wbMDAutomation.xml” file to identify excluded jobs (i.e. the exception list determines which customers get the 5D/Non5D split or are not split at all) that is saved in the [Plug-in In-Bound folder](#) along with the Mail.dat zip file. Jobs to be split using the alternate process (i.e. 5D/non5D) and/or not split at all are identified by client or customer. The user defines who the clients or customers are in the .xml file.

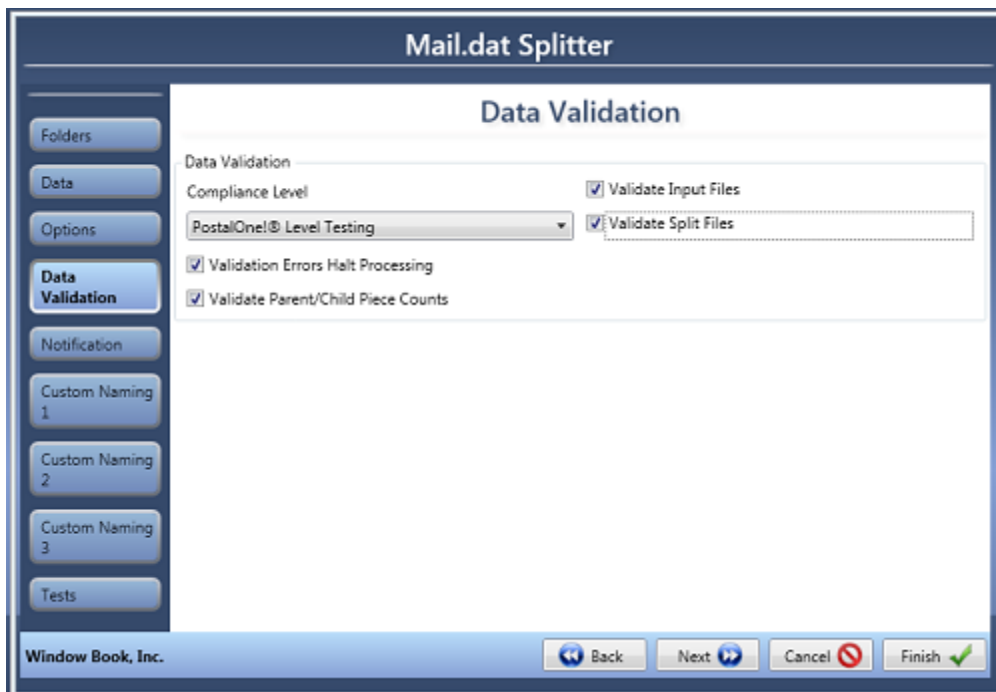
Plug-In Setup & Configuration

- **Origin/Drop Ship:** When selected, this option will create two split files: one for Origin mail; and one for Drop Ship mail;
 - **Pallet:** Split source by mother pallet ID;
 - **Physical Zip and Facility Type:** Split source files by Physical ZIP and Facility Type. Split name is Physical Plant ZIP + Facility Type code; and
 - **Segment:** Split source files by Segment ID. Split name is Segment ID.
- **Split Files Mail.dat Version:** Select the Mail.dat version number for the split files.

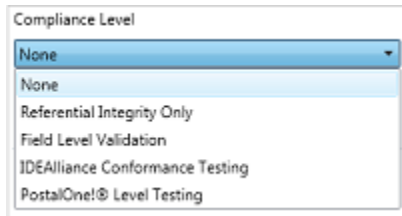


Click the **Next** button to continue;

6. The *Data Validation* screen will display. The following options relating to data validation are available from this screen:



- **Compliance Level:** Select a compliance level from the drop down provided to be applied to the Mail.dat files:



- **None:** No compliance validation is done on the Mail.dat data;
 - **Referential Integrity Only:** Record counts as reported in the HDR fields checked against other files;
 - **Field Level Validation:** Basic field content checks (in addition to Referential Integrity checks) including justification. For example, numeric fields should only contain number characters;
 - **IDEAlliance Conformance Testing:** In addition to performing the Field Level Validation checking, the fields are evaluated based upon values that are generally known to be valid for these fields (e.g. HDR PQT File Status should be one of: O, D, R, N, C, U). The validation may take into consideration other related values. For example, to determine the list of valid zones for CQT Zone, one needs to consider Class Defining Preparation, and if it is Periodicals then we also need to know the CQT 3-Digit /5-Digit Container divisions and also the CQT Not County/ In County indicator. Required fields are also checked to make sure they are not omitted;
 - **PostalOne!® Level Testing:** Fields required by *PostalOne!* are included. The IDEAlliance Conformance tests are performed and additional fields for *PostalOne!* are added into the required or not list (e.g. PDR Move Update Method);
- **Validation Errors Halt Processing:** Select (check) this option to have the Splitter processing stop after validation errors are encountered;
 - **Validate Parent/Child Piece Counts:** Select (check) this option to have the Splitter validate that child aggregate piece counts match the parent piece count (e.g. aggregate CQT piece count matches parent CSM piece count);
 - **Validate Input Files:** Select (check) this option to have the Splitter validates the source Mail.dat files;
 - **Validate Split Files:** Select (check) this option to have the Splitter validate the split Mail.dat output files.

Click the **Next** button to continue;

7. The *Notification* screen will display. Using this feature, automatic notifications will be sent to a series of people via email and/or SMS text messaging when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure');



The setup and use of the Notification feature require the user to have the necessary information about their company's SMTP e-mail server. Consult your company's e-mail administrator to obtain the necessary SMTP information.

Plug-In Setup & Configuration

i Enabling and configuring the Notification feature is not required for using the Mail.dat Splitter plug-in.

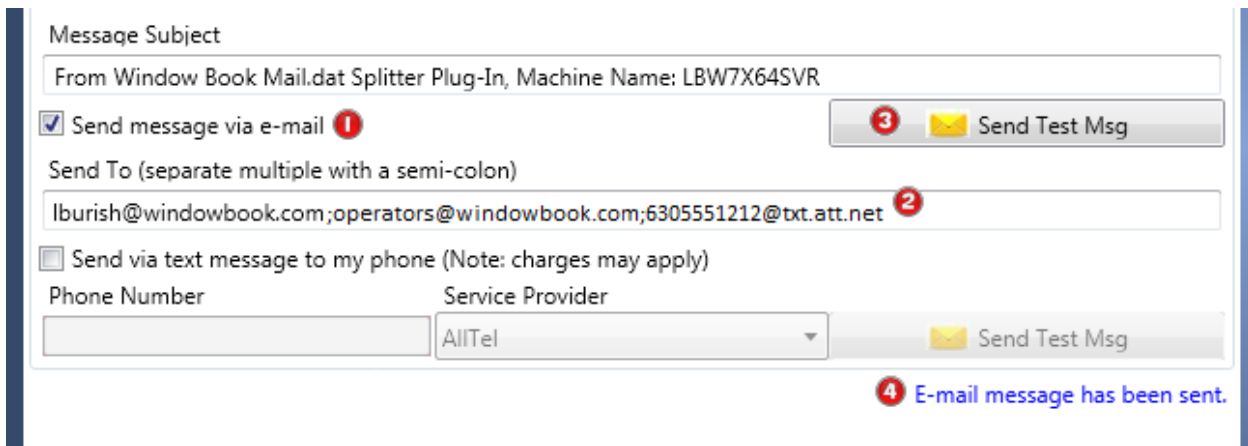
To enable and configure the Notification feature, do the following:

The screenshot shows the 'Mail.dat Splitter' application window with the 'Notification' tab selected. The configuration fields are as follows:

- 1:** 'Send on failure' checkbox is checked.
- 2:** 'SMTP Host' is 'mail.windowbook.local'.
- 3:** 'SMTP Port' is '25'.
- 4:** 'SMTP User Name' is 'Iburish'.
- 5:** 'Enable SSL' checkbox is unchecked.
- 6:** 'Send From' is 'DONOTREPLY@windowbook.com'.
- 7:** 'Message Subject' is 'From Window Book Mail.dat Splitter Plug-In, Machine Name: LBW7X645VR'.

- Select (check) the option to 'Send on success' and/or the option to 'Send on failure' **1**;
- **SMTP Host:** Enter the URL or IP address of the SMTP server **2**;
- **SMTP Port:** Enter the value of the SMTP port (most common port is 25, but it can be different) **3**;
- **SMTP User Name and Password:** Enter the username and password that is used to access the SMTP server **4**. They can be the user's own login and password; however, if the password changes, the information will have to be updated/changed here as well. One work-around would be to have the company's email administrator set up a dedicated user account for this purpose and be responsible for maintaining these credentials;
- **Enable SSL:** Only to be selected (checked) if the company's SMTP server requires SSL encryption **5**;
- **Send From:** This is the email address that will display as the Sender of the email notifications. Window Book encourages the use of a 'Do Not Reply' address as most times replies to these emails are unwanted (e.g. 'DoNotReply@<yourcompanydomain>.com') **6**; and
- **Message Subject:** Use the default displayed or enter a subject that will command some attention **7**. Notifications are for events that require some sort of user attention. One example would be: "Attention Required!".

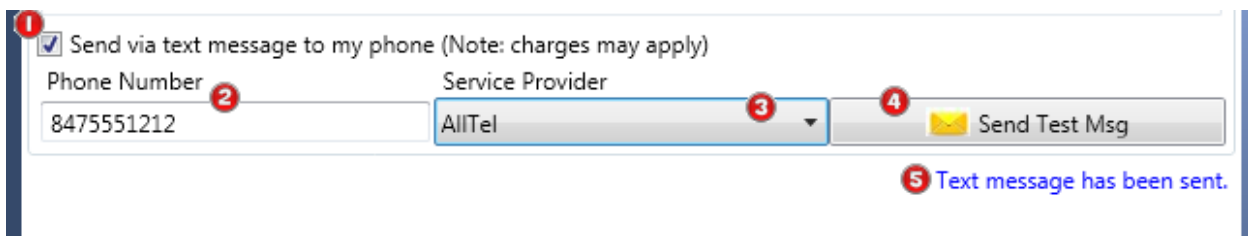
To set up notifications to be sent via email, do the following:



- **Send Messages via Email:** Select (check) the ‘Sent message via email’ option (1); and
- **Send To:** Enter the email address to send the notification(s) to. If entering more than one email address, separate the addresses using a semi-colon (no spaces). Group email addresses created in Outlook or whatever email tool the Client uses can also be entered (in the example here, a group email address of ‘Operators@windowbook.com’ is entered); as well as, text-to-email addresses for users’ cell phones (e.g. 6305551212@txt.att.net) (2).

When the email addresses have been entered, click the **Send Test Msg** button (3) to confirm that the notification is working properly. Each recipient will receive a test message in their email box or on their cell phone, depending on what type of email address was entered. A confirmation notification message will display on the screen when the notification was sent successfully (4).

To set up notifications to be sent via text message, do the following:



- **Send Via Text Message:** Select (check) the option to ‘Send via text message to my phone’ (1);
- **Phone Number:** Enter the 10-digit phone number (2);
- **Service Provider:** Select the Service Provider from the drop-down list provided (3); and
- When the phone number has been entered and the service provider selected, click the Send Test Msg button (4) to confirm the notification is working properly. The recipient will receive a test message on their cell phone. A confirmation notification message will display on the screen when the notification has been sent successfully (5).

Plug-In Setup & Configuration

i Keep in mind that when using the option to send notifications via text messaging, standard text messaging rates may apply.

i Currently, users are only able to set up one text message recipient. This is a limitation that may be addressed in future releases of this product. Until that time, users can set up text notifications for multiple people by using the text-to-email address functionality discussed in [step 7](#) above.

Click the **Next** button to continue;

8. The *Custom Naming 1* screen will display. Custom Naming can be used to insert specific text to be used in the names to the split files. This text will appear in addition to the split name as described in the 'Split Process' section of the *Options* screen discussed in [step 5](#) in this section.

This screen is comprised of the following fields:

Mail.dat Splitter

Custom Naming 1

Custom Naming Convention

Prefix Text **1**

Start Position **2**

End Position **3**

Insert Position **4**

Insert Text **5**


Suffix Text **6**


Clear

All values (Prefix & Suffix are optional) must be supplied if at least one is entered. Positions must be digits.

Window Book, Inc. Back Next Cancel Finish

- **Prefix Text **1****: Input optional text to prefix to the split name portion of the split Mail.dat file names;
- **Start Position **2**, End Position **3**, Insert Position **4****: Enter numerical values into each of these fields to determine at which point in the split portion of the file name the specified text is inserted;
- **Insert Text **5****: Input optional text to insert into the split name portion of the split Mail.dat file names; and

- **Suffix Text** : Input optional text to append to the split name portion of the split Mail.dat file names.

 **Custom Naming only affects the split name portion of the file names. If the original file name and/or job number is used in the split file names, these text strings are unaffected by Custom Naming.**

Click the **Clear** button to clear all of the data entered into each of the fields.

Click the **Next** button to continue;

9. The *Custom Naming 2* screen will display. This screen operates in the same manner as the *Custom Naming 1* screen. Whatever text is added or specified here will be appended to the values or data entered into the *Custom Naming 1* screen. Click the **Next** button to continue;



Mail.dat Splitter

Custom Naming 2

Custom Naming Convention

Prefix Text

Start Position

End Position

Insert Position

Insert Text

Suffix Text

Clear

All values (Prefix & Suffix are optional) must be supplied if at least one is entered. Positions must be digits.

Window Book, Inc. Back Next Cancel Finish

Plug-In Setup & Configuration

10. The *Custom Naming 3* screen will display. This screen operates in the same manner as the *Custom Naming 1* screen. Whatever text is added or specified here will be appended to the values or data entered into the *Custom Naming 1* and the *Custom Naming 2* screens. Click the **Next** button to continue;

The screenshot shows the 'Mail.dat Splitter' application window with the 'Custom Naming 3' screen active. The left sidebar contains buttons for 'Folders', 'Data', 'Options', 'Data Validation', 'Notification', 'Custom Naming 1', 'Custom Naming 2', 'Custom Naming 3' (highlighted), and 'Tests'. The main area is titled 'Custom Naming 3' and contains the following fields: 'Prefix Text', 'Start Position', 'End Position', 'Insert Position', 'Insert Text', and 'Suffix Text'. A red warning message at the bottom states: 'All values (Prefix & Suffix are optional) must be supplied if at least one is entered. Positions must be digits.' A 'Clear' button is located to the right of the fields. At the bottom of the window, there are 'Back', 'Next', 'Cancel', and 'Finish' buttons.

11. The *Tests* screen will display. Select (check) the option to 'Run configuration tests the next time plug-in runs' (optional). The test results from the previous test run will display in the 'Previous Configuration Test Results' window;

The screenshot shows the 'Mail.dat Splitter' application window with the 'Tests' screen active. The left sidebar contains buttons for 'Folders', 'Data', 'Options', 'Data Validation', 'Tests' (highlighted), and 'Notification'. The main area is titled 'Tests' and contains the following options: 'Run configuration tests the next time plug-in runs' (checked), and 'Previous Configuration Test Results'. The test results are displayed in a text box: 'File 'C:\WBDDOTNET\Development\wbDotNet40\Binaries\TesterNPS.exe' exists (ini Successfully opened file 'C:\WBDDOTNET\Development\wbDotNet40\Binaries\Test Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write access Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write access

Click the **Finish** button. The configuration of the Mail.dat Splitter plug-in is complete! Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

PPP MANAGER PLUG-IN

i *Window Book strongly recommends using the Process Manager plug-in in lieu of the PPP Manager plug-in. The Process Manager plug-in can be used to run the PPP's FTP or HTTP-based USPS package tracking data collection and the automated email functions that tracking data drives. Therefore, set-up and/or configuration instructions are not provided for the PPP Manager plug-in. For more information, contact Window Book Technical Support (refer to the [Contact Information](#) section in this Guide).*

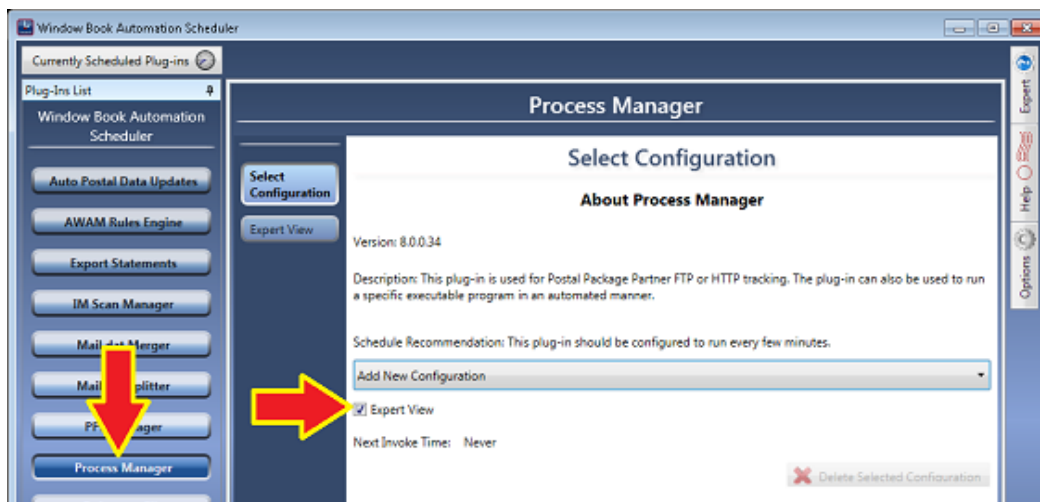
PROCESS MANAGER PLUG-IN

The Process Manager plug-in can be used to run predefined or custom processes in an automated manner for various Window Book software applications like PPP and DAT-MAIL. The [pre-defined processes](#) can be selected and scheduled with minimal configuration. The [custom processes](#) can be specified by their executable name and may include any necessary command line arguments.

Predefined Process

To configure a predefined process, do the following:

1. Click the **Process Manager** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



2. The *Expert View* screen will display. Enter a name specific to the configuration being created and specify when and how often the plug-in's process will run;

Plug-In Setup & Configuration

- i** *Window Book does not recommend enabling the function to 'Run at start-up' unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

Click the **Next** button to continue;

The screenshot shows the 'Process Manager' window in 'Expert View'. The 'Name' field is 'Process Manager' and the 'Description' is 'This plug-in should be configured to run every few minutes.' The 'Recurs Every' is set to 'Daily' with a frequency of '1 Day(s)'. The 'Occurs Every' is set to '5 Minutes'. The 'Start Date' is 'Friday, June 12, 2015' and the 'End Date' is 'No End Date'. The 'Retries Count' is '0' and 'Retry Seconds' is '300'. The 'Run at start-up' checkbox is unchecked. At the bottom, the 'Next' button is highlighted with a blue arrow.

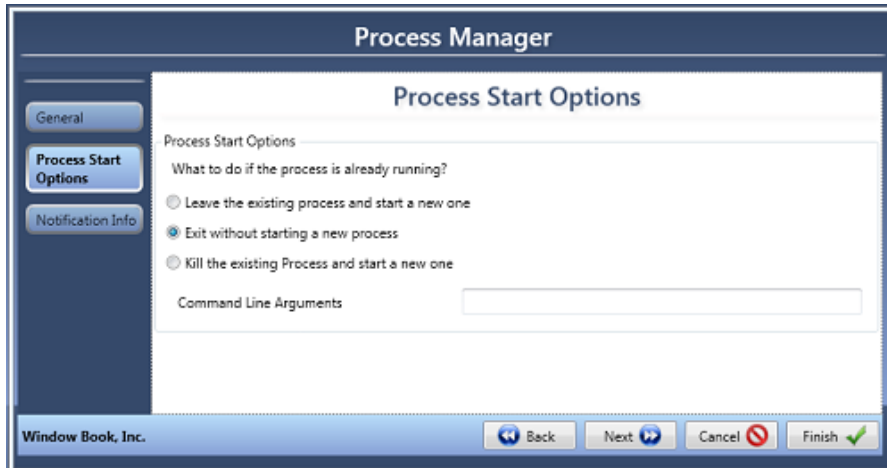
3. The *General* screen will display. Select the radio button to enable the 'Predefined Process' option **1**.

Select the predefined process from the drop-down list provided **2**. The available processes are: PPP FTP Tracking; PPP HTTP Tracking; or PPP Import Agent.

The screenshot shows the 'Process Manager' window in 'General' view. The 'Schedule ID' is 'a23098d3-e773-4ec1-908c-85cf388b2df8'. The 'Process' field is empty. Under 'Select Process to run:', the 'Predefined Process' radio button is selected (1). A drop-down list is open showing 'PPP HTTP Tracking' (2), 'PPP FTP Tracking', 'PPP HTTP Tracking', and 'PPP Import Agent'. The 'Timeout Period (waiting for the process to exit):' is set to '10 sec.' (3). At the bottom, the 'Next' button is highlighted with a blue arrow.

Specify the number of seconds to be used for the 'Timeout Period (waiting for process to exit)'. The default is 10 seconds **3**. Click the **Next** button to continue;

- The *Process Start Options* screen will display. Select the radio button for the preferred Process Start Option, i.e. “What to do if the process is already running?”:



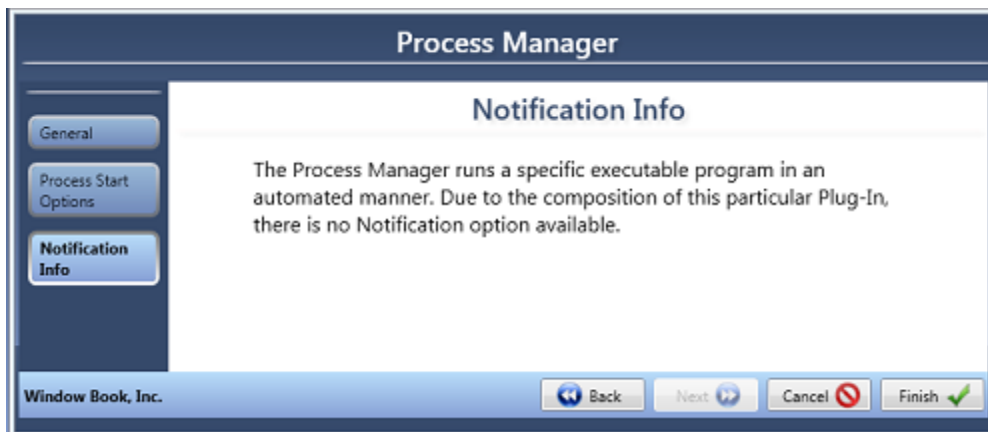
- Leave the existing process and start a new one;
- Exit without starting a new process (default); or
- Kill the existing process and start a new one (not recommended).

i *Window Book recommends using the default selection.*

i *The ‘Command Line Arguments’ field is used for custom processes only.*

Click the **Next** button to continue;

- The *Notification Info* screen will display:



Click the **Finish** button. The setup and configuration of a predefined process within the Process Manager plug-in is complete! Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

Plug-In Setup & Configuration

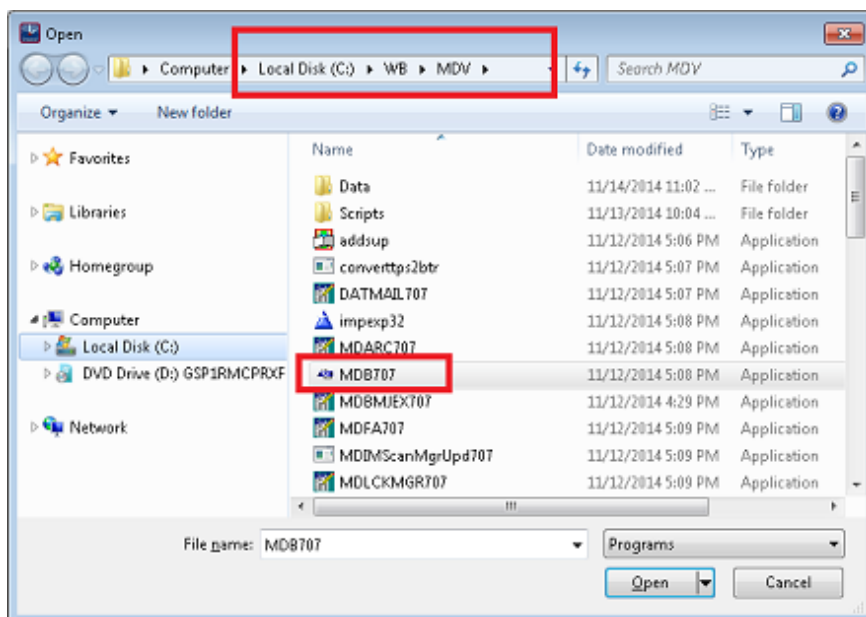
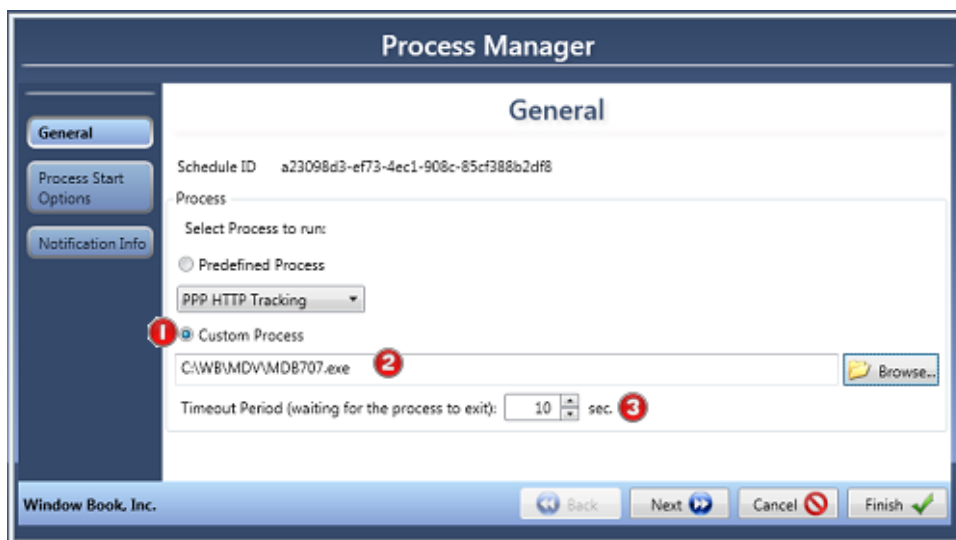
Custom Process

To configure a custom process, do the following:

1. Repeat [steps 1 and 2](#) under [Predefined Process](#) above;

! *If setting up a custom process to run the 'MDSupportAsst.exe' utility to perform purges and/or backups, it is important to make sure to run the custom process at a time when there are no users in the Window Book application(s) that will be affected, and/or when there are no other client-specific backups, snapshots, or other maintenance processes being performed to systems and/or SQL databases.*

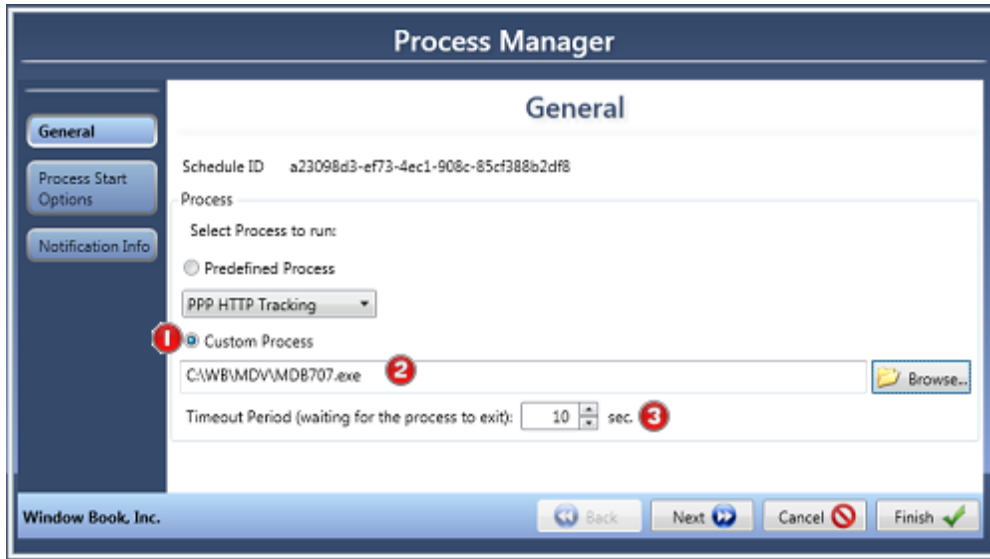
2. From the *General* screen, select the radio button to enable the 'Custom Process' function **1**;



Click the corresponding **Browse...** button to locate and select the executable file that runs the custom process.

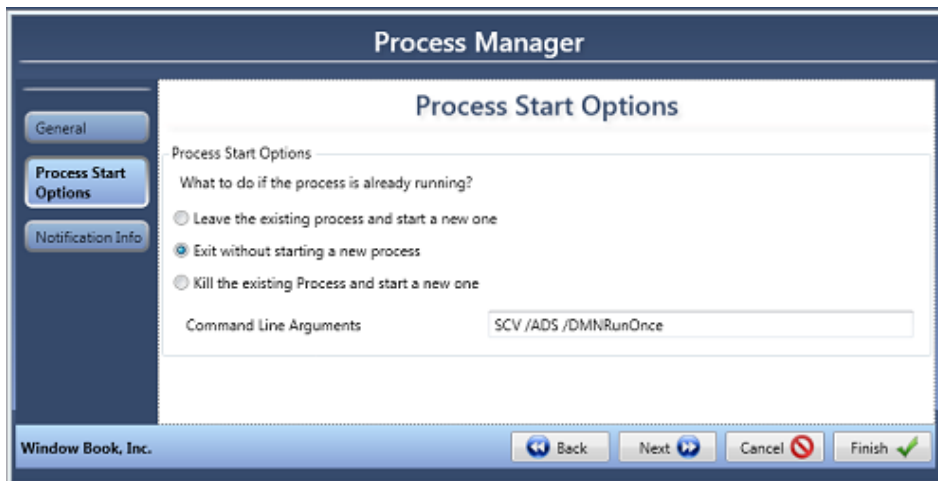
In the example here, the 'MDB707.exe' executable file, which is specific to DAT-MAIL, is selected **2**.

With the executable file selected (e.g. 'MDB707.exe'), click the **Open** button.



Specify the number of seconds to be used for the 'Timeout Period (waiting for process to exit)'. The default is 10 seconds **3**. Click the **Next** button to continue;

3. The *Process Start Options* screen will display. Select the radio button for the preferred Process Start Option, i.e. "What to do if the process is already running?":



- Leave the existing process and start a new one;
- Exit without starting a new process (default); or
- Kill the existing process and start a new one.

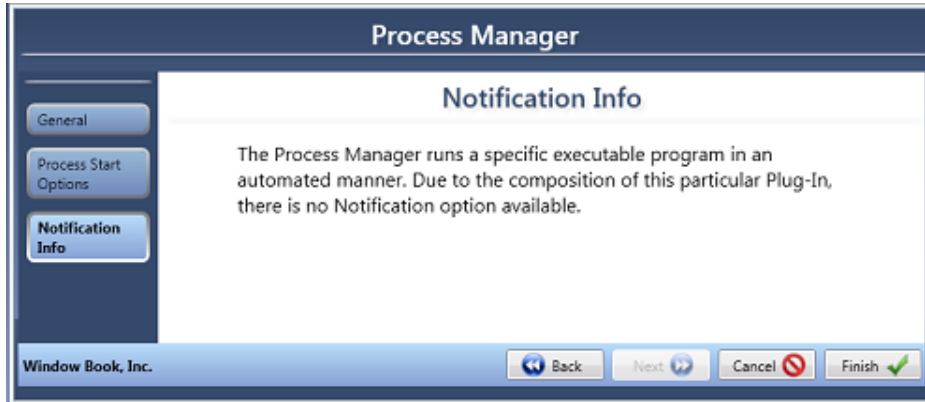
i *Window Book recommends using the default selection.*

Enter any 'Command Line Arguments' pertinent to the custom process (i.e. 'SCV /ADS /DMNRunOnce'). Click the **Next** button to continue;

Plug-In Setup & Configuration

i For *Command Line Arguments*, refer to the documentation which came with the custom process to be run.

4. The *Notification Info* screen will display:



Click the **Finish** button. The setup and configuration of a custom process within the Process Manager plug-in is complete! Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

REFERENCE FILE PLUG-IN

The Reference File plug-in is intended as a data import tool for importing a reference file that contains basic client and job information. This information is required by the customer to be present by the time statements are generated from the related Mail.dat files. The plug-in allows the user to configure the import settings.

i *The Export Statements plug-in was developed for a custom project and is not intended for public use. Contact your Window Book Sales Representative for more information. Contact information can be found in the [Contact Information](#) section of this Guide.*

i *Only one configuration can exist for this plug-in at any given time.*

The Reference File plug-in is configured by first enabling the Export View feature and clicking the **Next** button.

i *Window Book does not recommend enabling the function to 'Run at start-up' located in the "Expert View" screen unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in's frequency settings.*

The set-up screens for the plug-in allow the Client to:

- Configure when and how often the export process should run;
- Enable logging for the process if necessary (this is generally only enabled at the direction of a Window Book Technical Support Representative);
- Select the Reference File Executable File located on the PC;



The Reference File plug-in requires Window Book's DAT-MAIL software be installed.

- Specify the Process Start Options (i.e. 'What to do if the process is already running?'). The recommended option is: 'Exit without starting a new process';
- Enter any Command Line Arguments; however, this is not necessary; and
- Enable and set up one or both notification types: Email; and/or SMS text messaging to send notifications when the process runs without errors, and/or when the process encountered errors and failed.

TMS MANAGER PLUG-IN

The TMS Manager plug-in is used to run the 'wbTMSMgr' executable which imports Tray Management System (TMS) tray and pallet scan data into Window Book's 'wbDB' SQL Server database. It allows the Client to configure the handling of their physical tray and pallet scan data from their WB Scan or Carter Controls TMS.



Use of this plug-in requires access to MS SQL Server.

To configure the TMS Manager plug-in, do the following:

1. Click the **TMS Manager** button on the left to display the *Select Configuration* screen and enable (check) the 'Expert View' function. Click the **Next** button to continue;



Plug-In Setup & Configuration

- The *Expert View* screen will display. Enter a name that identifies the scan type the configuration is being created for (e.g. “TMS Manager – WBI Scan”).

Next, specify when and how often the plug-in process will run;

i *Window Book does not recommend enabling the function to ‘Run at start-up’ unless directed to do so by a Window Book Support representative. If this option is enabled and the Automation Scheduler is stopped and started for whatever reason, the plug-in will run every time the Automation Scheduler starts regardless of, and in addition to, the plug-in’s frequency settings.*

The screenshot shows the 'TMS Manager' software interface in 'Expert View' mode. The window title is 'TMS Manager' and the subtitle is 'Expert View'. On the left side, there are two buttons: 'Select Configuration' and 'Expert View'. The main area contains the following fields and options:

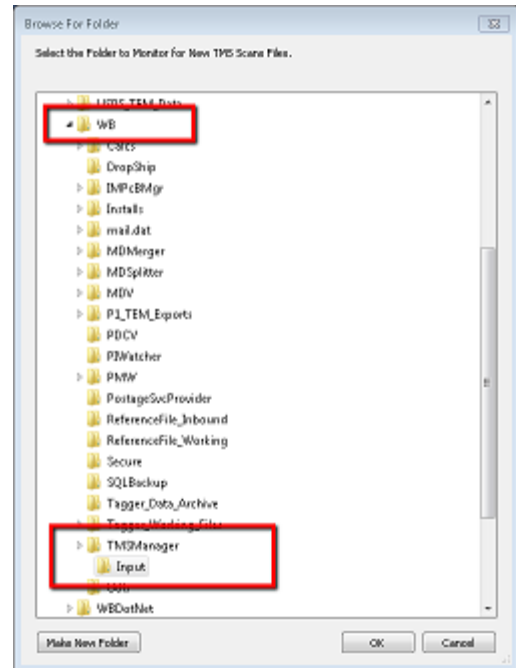
- Name:** TMS Manager
- Description:** This plug-in should be configured to run every few minutes.
- Frequency:** Daily (Recurs Every: 1 Day(s)), Weekly, Monthly
- Occurrence:** Occurs Once At (12:00 AM), Occurs Every (5 Minutes)
- Time Range:** Starting At (12:00 AM), Ending At (11:59 PM)
- Start Date:** Friday, June 12, 2015
- End Date:** Saturday, June 13, 2015; No End Date
- Retries:** Retries Count (0), Retry Seconds (300), Run at start-up

At the bottom of the window, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'. The 'Next' button is highlighted with a blue glow.

Click the **Next** button to continue;

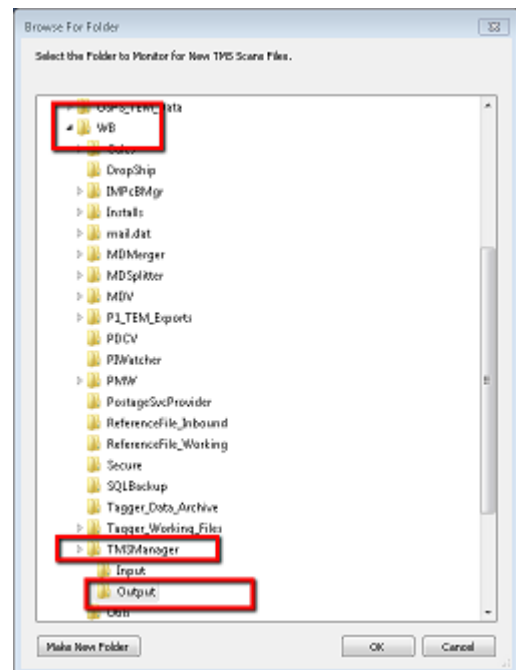
3. The *Folders* screen will display. Click the **Browse...** button to create the necessary 'TMS\Input' folders under the 'WB' directory. A *Browse for Folder* dialog will display.

- Select the 'WB' folder and click the **Make New Folder** button. Name the new folder 'TMSManager';
- With the 'TMSManager' folder selected, click the **Make New Folder** button again and name the new folder 'Input' (e.g. '\\...WB\TMSManager\Input'); and
- Click the **OK** button to close the dialog.



Click the **Browse...** button to create the necessary 'Output' folder under the 'TMSManager' sub-folder. A *Browse for Folder* dialog will display.

- Select the 'WB' folder and select the 'TMSManager' sub-folder;
- With the 'TMSManager' sub-folder selected, click the **Make New Folder** button and name the new folder 'Output' (e.g. '\\...WB\TMSManager\Output'); and
- Click the **OK** button to close the dialog.



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- i** In a server with workstation(s) environment, UNC path names should be used when specifying the TMS Input and TMS Output folders (see image below). Use the Browse... button to obtain the UNC path names for each. For more information on obtaining UNC path names, refer to [Appendix 1](#) in this Guide.

Click the **Next** button to continue;

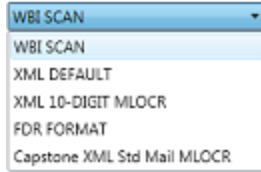
The screenshot shows the 'TMS Manager' application window with the 'Folders' tab selected. The 'Files & Folders' section contains two input fields: 'TMS Import Folder' and 'TMS Output Folder'. Both fields contain the UNC path '\\Lbw7x64svr\wb\TMSManager\input' and '\\Lbw7x64svr\wb\TMSManager\Output' respectively. Each field has a 'Browse...' button to its right. At the bottom of the window, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'. The 'Next' button is highlighted with a blue arrow.

4. The *Processing Options* screen will display. This screen contains the following items:

- **Enable Plug-in Logging** **1**: Select (check) this option to enable message logging to the Window Event log. This option is typically checked for technical support purposes only;


The screenshot shows the 'TMS Manager' application window with the 'Processing Options' tab selected. The 'Processing Options' section contains several settings: 'Source Data Type' is set to 'WBI SCAN' (marked with a red circle 2); 'MLOCR Mailing Job Date Based On' is set to 'TMS File Import Time' (marked with a red circle 3); 'MLOCR Mailing Job Cut-off Time (12:00 AM for midnight)' is set to '12:00 AM' (marked with a red circle 4); 'MLOCR Oldest Mail.dat Job to Process (days)' is set to '0' (marked with a red circle 5); 'Number of days to keep log files' is set to '7' (marked with a red circle 6); and 'Populate Date Of Mailing From:' is set to 'Oldest Scan Date' (marked with a red circle 7). The 'Enable Plug-In Logging' checkbox is checked (marked with a red circle 1). At the bottom of the window, there are four buttons: 'Back', 'Next', 'Cancel', and 'Finish'. The 'Next' button is highlighted with a blue arrow.

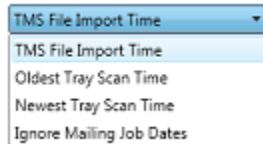
- **Source Data Type** **2**: Select the source data type from the drop-down list provided:



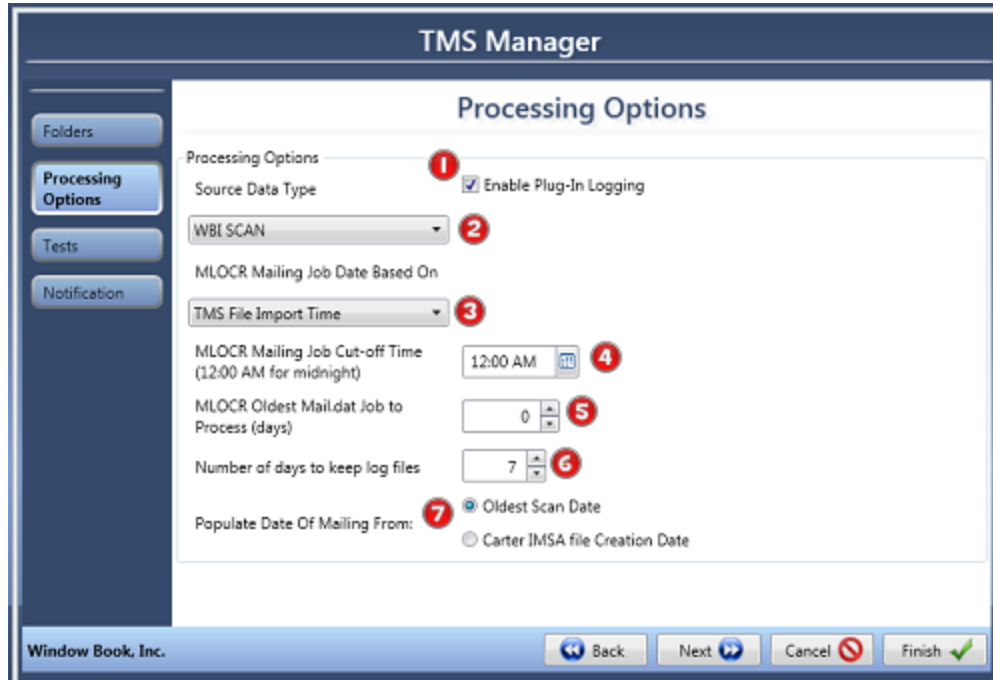
- *WBI Scan*: Window Book’s ‘MDScan’ program is generating the container scans;
- *XML Default*: Carter Control generates the scan files. This option maps tray scans directly to IMTL barcodes found typically in presort Mail.dat jobs;
- *XML 10-Digit MLOCR*: Carter Control generates scan files. This option maps tray scans directly to IMTL barcodes found typically in presort Mail.dat jobs, but if no direct match is found, will attempt to match 10-digit barcode information found in tray scan with 10-digit barcode found in MLOCR Mail.dat jobs;
- *FDR Format*: This option maps tray scans directly to IMTL barcodes found typically in presort Mail.dat jobs much like the ‘XML Default’ option; however, the ‘FDR Format’ option uses an XML file that is not generated by, and is formatted differently than the XML generated by Carter Control; or
- *Capstone XML Std Mail MLOCR*: Custom coding project (TP12017).

i Each scan type will require its own TMS Manager plug-in configuration.

- **MLOCR Mailing Job Date Based On** : How to filter the MLOCR Mail.dat jobs (i.e. IMBML records) to find only those MLOCR jobs that should be linked to the tray scans being imported. The mailing job oldest number of days and mailing job cut-off time values (see below) are used to calculate the earliest and latest mailing dates of MLOCR jobs to include in the TMS scan file processing. Available options are:



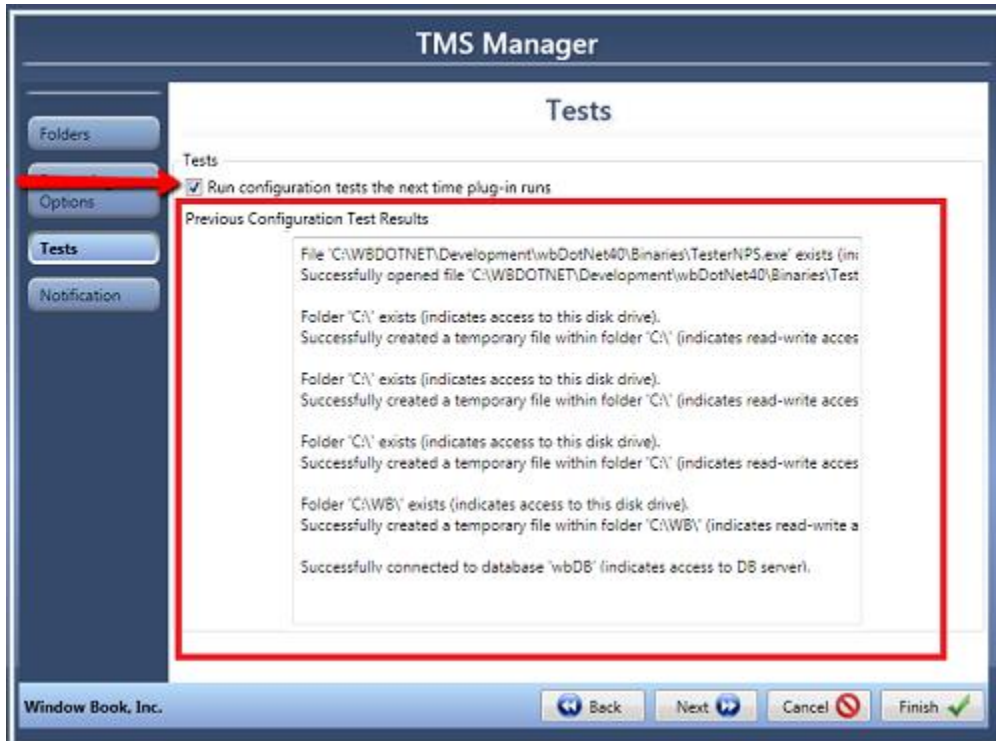
- *TMS File Import Time*: The current time when the file import is processed is used to calculate the newest date in the filter range;
- *Oldest Tray Scan Time*: The oldest tray scan time is used to calculate the newest date in the filter range;
- *Newest Tray Scan Time*: the newest tray scan time is used to calculate the newest date in the filter range; and
- *Ignore Mailing Job Dates*: When this option is selected, the TMS Manager plug-in ignores CSM container date of mailing when finding MLOCR logical tray records (IMBML records) to link to TMS tray scan records.



- **MLOCR Mailing Job Cut-off Time** ⁴: Used to adjust the newest date (see above) in the MLOCR date filter range. If the calculated newest time is between midnight and the cut-off time, the newest date used in the date filter is 1 day prior to the calculated date. If the cut-off time is between midnight and the calculated newest time, the newest date used is the same day as the calculated date. Specify a time of midnight (12:00 AM) to always include MLOCR records for today's date, or the oldest or newest scan date, depending upon the mailing job date type selection;
- **MLOCR Oldest Mail.dat Job to Process** ⁵: Used to calculate the oldest date in the MLOCR date filter range. The specified number of days is subtracted from the calculated newest time to find the earliest date of MLOCR jobs to include in the TMS scan file processing. For example, use 0 days to indicate filtering on only the current day's mailings. Use 1 day to indicate filtering on current day's and prior day's mailings;
- **Number of days to keep log files** ⁶: The number of days to retain the message log files generated by the TMS Manager program. Older log files will be deleted each time the plug-in runs, as appropriate;
- **Populate Date of Mailing From** ⁷: Select the radio button for either:
 - *Oldest Scan Date*: The oldest scan date in the Carter IMSA XML file will be used to populate Date of Mailing field in the TMS tables; or
 - *Carter IMSA file Creation Date*: Date from the Carter IMSA file name will be used to populate Date of mailing field in the TMS tables.

Click the **Next** button to continue;

- The *Tests* screen will display. Select (check) the option to 'Run configuration tests the next time plug-in runs' (optional). The test results from the previous test run will display in the 'Previous Configuration Test Results' window. Click the **Next** button to continue;



- The *Notification* screen will display. Using this feature, automatic notifications will be sent to a series of people via email and/or SMS text messaging when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').

i *The setup and use of the Notification feature require the user to have the necessary information about their company's SMTP e-mail server. Consult your company's e-mail administrator to obtain the necessary SMTP information.*

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To enable and configure the Notification feature (optional), do the following:

The screenshot shows the 'Notification' configuration page in TMS Manager. The page has a sidebar with buttons for 'Spoilage Import', 'Whittier Import', 'Notification', and 'Tests'. The main content area is titled 'Notification' and contains the following fields and checkboxes:

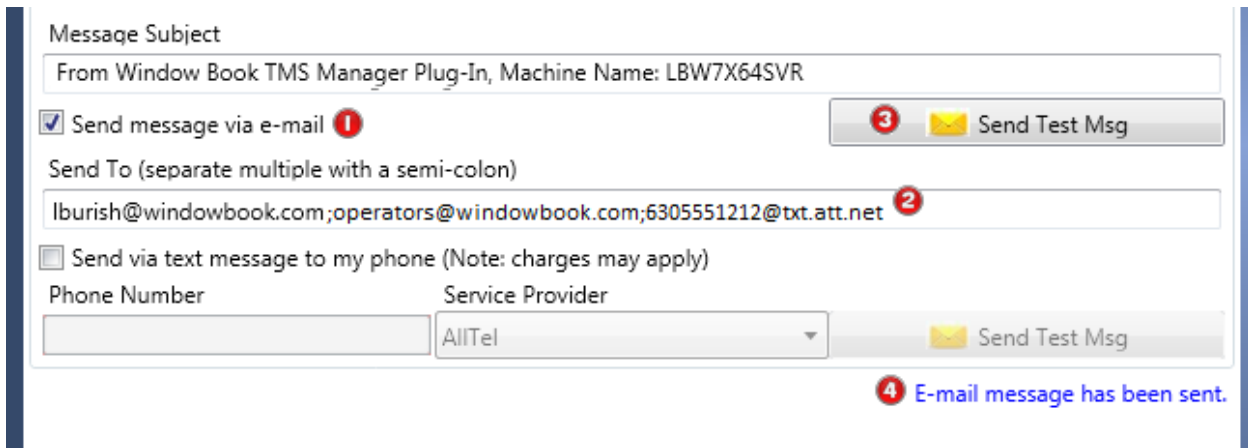
- E-mail & Text Message Settings** (1): Includes checkboxes for 'Send on success' and 'Send on failure'.
- SMTP Host** (2): Text field containing 'mail.windowbook.local'.
- SMTP Port** (3): Text field containing '25'.
- SMTP User Name** (4): Text field containing 'lburish'.
- SMTP Password**: Text field containing '*****'.
- Enable SSL** (5): Checkable checkbox.
- Send From** (6): Text field containing 'DONOTREPLY@windowbook.com'.
- Message Subject** (7): Text field containing 'From Window Book TMS Manager Plug-In, Machine Name: LBW7X64SVR'.

- Select (check) the option to 'Send on success' and/or the option to 'Send on failure' (1);

i *Window Book recommends enabling only the 'Send on failure' option in order to eliminate the number of unnecessary and unwanted messages that will occur if 'Send on Success' is enabled.*

- **SMTP Host:** Enter the URL or IP address of the SMTP server (2);
- **SMTP Port:** Enter the value of the SMTP port (most common port is 25, but it can be different) (3);
- **SMTP User Name and Password:** Enter the username and password that is used to access the SMTP server (4). They can be the user's own login and password; however, if the password changes, the information will have to be updated/changed here as well. One work-around would be to have the company's email administrator set up a dedicated user account for this purpose and be responsible for maintaining these credentials;
- **Enable SSL:** Only to be selected (checked) if the company's SMTP server requires SSL encryption (5);
- **Send From:** This is the email address that will display as the Sender of the email notifications. Window Book encourages the use of a 'Do Not Reply' address as most times replies to these emails are unwanted (e.g. 'DoNotReply@<yourcompanydomain>.com') (6);
- **Message Subject:** Use the default displayed or enter a subject that will command some attention (7). Notifications are for events that require some sort of user attention. One example would be: "Attention Required!";

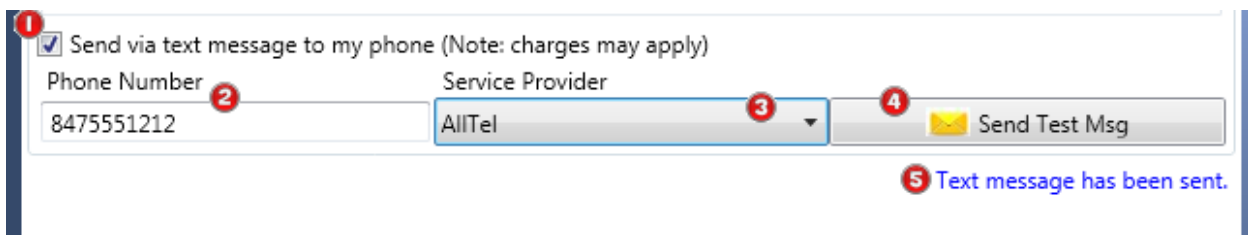
To set up notifications to be sent via email, do the following:



- **Send Messages via Email:** Select (check) the ‘Send message via email’ option (1);
- **Send To:** Enter the email address to send the notification(s) to. If entering more than one email address, separate the addresses using a semi-colon (no spaces). Group email addresses created in Outlook or whatever email tool the Client uses can also be entered (in the example here, a group email address of ‘Operators@windowbook.com’ is entered); as well as, text-to-email addresses for users’ cell phones (e.g. 6305551212@txt.att.net) (2); and

When the email addresses have been entered, click the **Send Test Msg** button (3) to confirm that the notification is working properly. Each recipient will receive a test message in their email box or on their cell phone, depending on what type of email address was entered. A confirmation notification message will display on the screen when the notification was sent successfully (4).


To set up notifications to be sent via text message, do the following:






- **Send Via Text Message:** Select (check) the option to ‘Send via text message to my phone’ (1);
- **Phone Number:** Enter the 10-digit phone number (2);
- **Service Provider:** Select the Service Provider from the drop-down list provided (3); and

When the phone number has been entered and the service provider selected, click the Send Test Msg button (4) to confirm the notification is working properly. The recipient will receive a

Plug-In Setup & Configuration

test message on their cell phone. A confirmation notification message will display on the screen when the notification has been sent successfully .

-  **Keep in mind that when using the option to send notifications via text messaging, standard text messaging rates may apply.**
-  **Currently, users are only able to set up one text message recipient. This is a limitation that may be addressed in future releases of this product. Until that time, users can set up text notifications for multiple people by using the text-to-email address functionality discussed in [step 6](#) above.**
-  **Process Status values are as follows:**

0 = None	9 = Ready-To-Pay File Sent to PostalOne!
1 = Importing	10 = Ready-To-Pay File failed
2 = Import has completed successfully	11 = Ready-To-Pay File accepted
3 = Import has errors	12 = Ready-To-Pay File finalized
4 = Co-pal Mail.dat has been created	13 = Co-pal file sent to PostalOne!
5 = Statements Generated	14 = Co-pal file failed
6 = Planned file sent to PostalOne!	15 = Co-pal file accepted
7 = Planned file failed	16 = Job closed
8 = Planned file accepted	

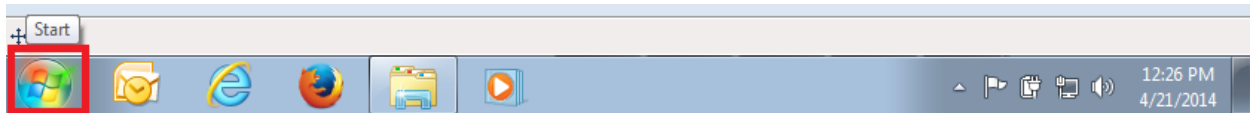
Click the **Finish** button. The setup and configuration of the TMS Manager plug-in is complete!

Make sure to stop and restart the service to ensure the plug-in becomes enabled (refer to the write-up under the [Plug-in Setup & Configuration](#) section in this Guide for more information).

APPENDIX 1 – UNC PATH NAMES

To easily identify and use a UNC path name, perform the following:

1. On the computer, click the **Start** button;



2. From the menu provided, click the **Computer** button;

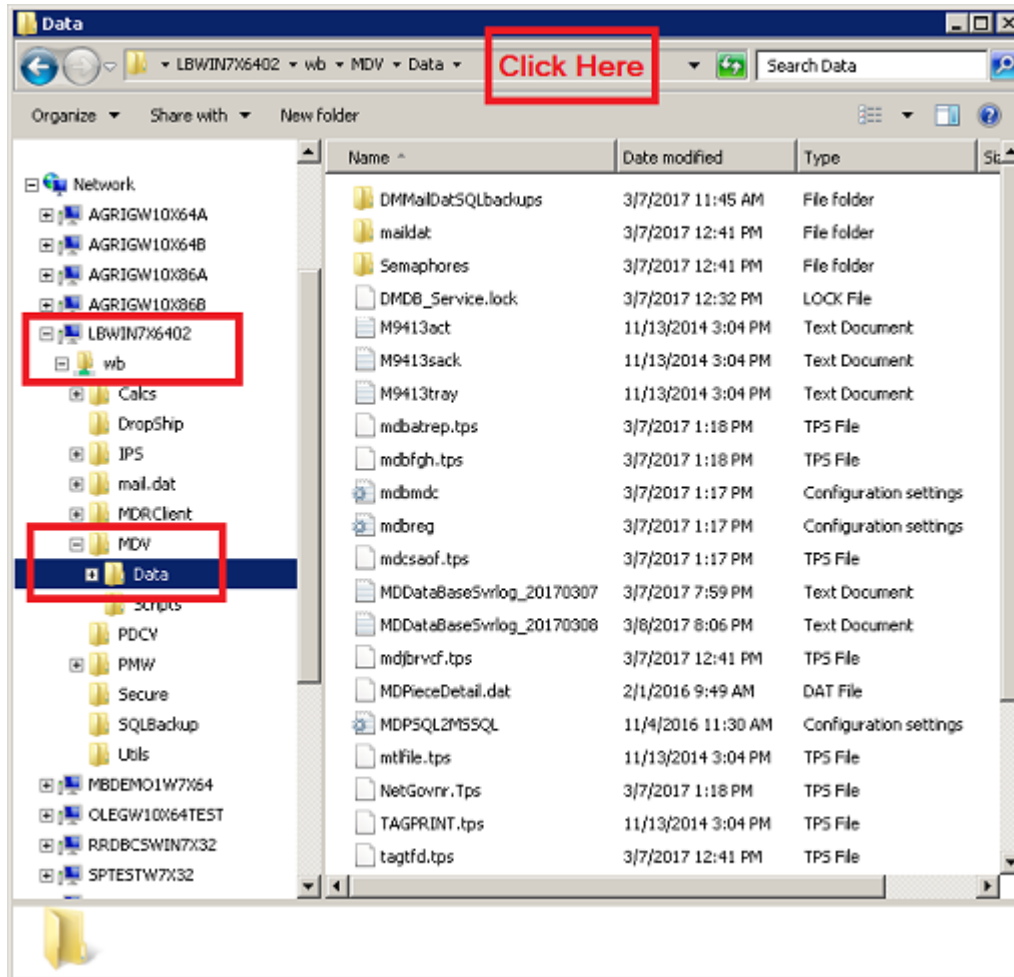


Appendix 1 – UNC Path Names

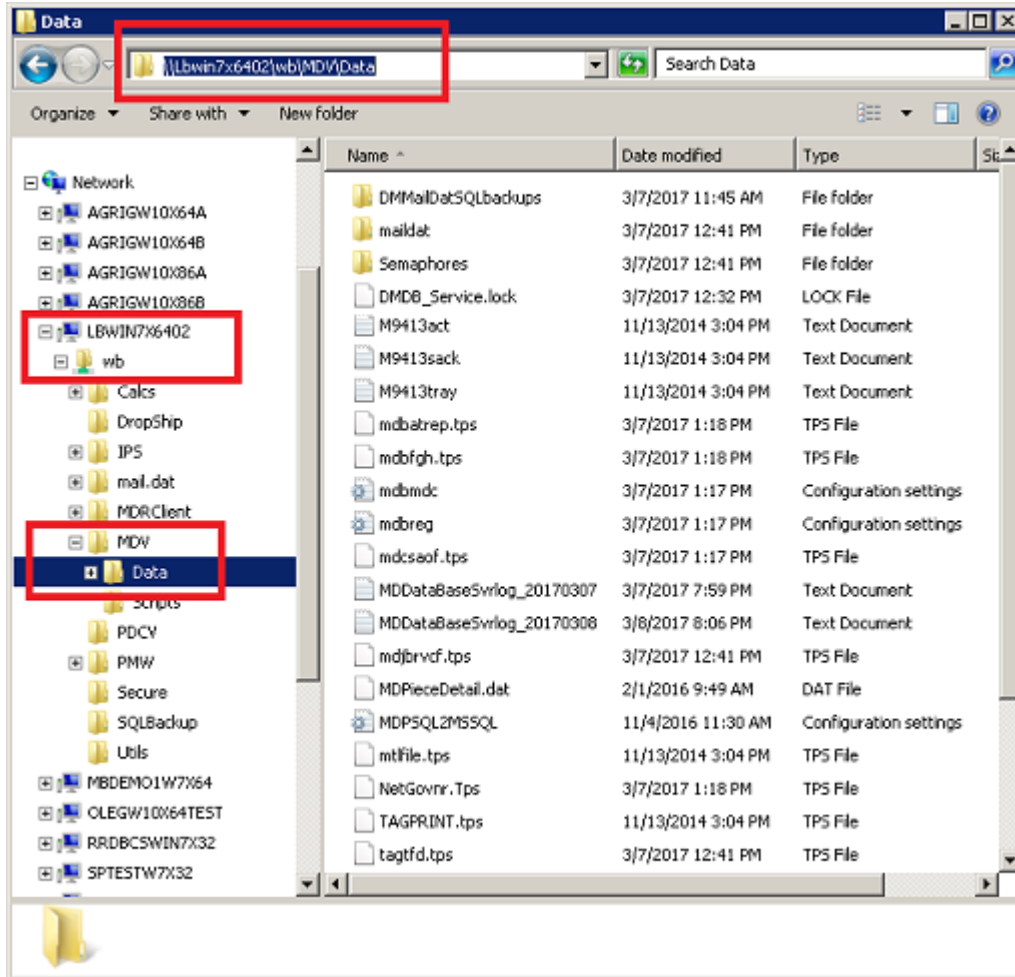
3. A Windows Explorer screen will display:

Locate the server where the application's data folders reside and select the data folder you need the UNC path name for;

The folder's file path information will display in the address bar at the top of the screen. Click anywhere in the empty space at the end, or to the right of the path address;



The folder path name will change to display the actual UNC path name for the folder. The UNC path name will be highlighted;



Using the computer's keyboard, press and hold the 'CTRL' key and at the same time, press the 'C' key (you are copying the highlighted UNC path name);

Appendix 1 – UNC Path Names

4. Place the cursor in the field where the UNC path name is to be entered. Using the computer's keyboard, press and hold the 'CTRL' key and at the same time, press the 'V' key (you are pasting the copied UNC path name).

EXAMPLE: In the screen image below, the UNC path name has been copied and pasted into the data path fields for a Workstation installation of DAT-MAIL.

