



Automation Scheduler™

System Guide Version 13, Created April 15, 2020



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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	<u>REQUIREMENTS</u>	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	<u>COMPONENT UPDATE</u> <u>SEQUENCE</u>	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, <u>Custom Process</u>	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. <u>Contact your local Window Book Client Services</u> <u>Representative</u> for more information. The registration key should be obtained <u>before</u> 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 <u>Window Book Client</u> <u>Services Team</u>). The registration key should be obtained <u>before</u> 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 <u>Automation Scheduler Software</u> <u>Downloads page</u> 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 standalone 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 <u>not</u> 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

<u>before</u> beginning each Window Book product installation. Refer to <u>SOFTWARE PREREQUISITES</u> for more information.

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INSTALLATION

It is very important that the information provided under <u>REQUIREMENTS</u> 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 <u>first-time installation</u> 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 <u>UPDATING YOUR SOFTWARE</u> for more information.

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 <u>after</u> 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.

All Window Book product documentation (including User Guides) are available from within Window Book's <u>Support Portal</u>. 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 <u>before</u> 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: <u>http://www.windowbook.com/Support/Downloads</u>.

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.



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.

Meeting the prerequisite requirements for any Window Book software application installed <u>before</u> 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

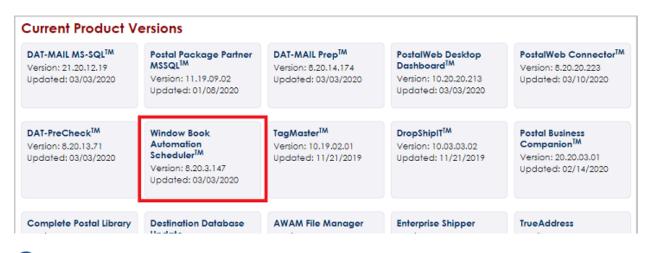
To download and install Window Book's Automation Scheduler with plug-ins, perform the following:

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

Register Login Main Numb	er 800-524-0380) Techni	ical Support	Number 800-47	7-3602			Online Payment
WindowBook Intelligent Automation	Solutions 5	Services	Support	Downloads	Resources	Contact	About	Q

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

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.



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 '<u>Software Downloads</u>' page.

D	What's New?
1	Click HERE to learn about what's new in our latest software release!

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

Installation

4. 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';

							×
🚱 🔵 🗢 🚺 🕨 vmuser 🕨 Downloa	ds ►		•	← Search Downloa	ıds		Q
Organize 🕶 💼 Open Share	with 🔻 New folder				8== 👻		0
🔆 Favorites	Name		Date modified	Туре	Size		
🧮 Desktop	BI_Scheduler_8.15.1.136_QA_x64		7/19/2019 11:37 AM	Annlication	57,271 KB]	
😹 Downloads			Onen				
🔛 Recent Places		8	Run as administrator				
	T		roubleshoot compatibili				
🥽 Libraries		ф	Scan with Microsoft Secu	rity Essentials			
			Change carible				

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

InstallAv	ware Wizard	×
Scheduller	The InstallAware Wizard is verifying the of this setup package. This may take a m	
		ancel

Software Presequisites dialog displays, download the required prerequisite software (refer to the <u>SOFTWARE PREREQUISITES</u> section in this Guide for more information).

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

Window Book Automation Scheduler (x64) Setup needs to update your system. Setup must install newer versions of the following ystem components before installing Window Book utomation Scheduler (x64).	WindowBook
 Setup will install the following components: Microsoft SQL Server 2008-R2 Naive Client (x64) 	
	Window Book Automation Scheduler (x64)
Skip Prerequisites Installation	Window Book, Inc.

Automation Scheduler™ System Guide

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

Welcome to the Setup Wizard for Window Book Automation Scheduler (x64). This wizard guides you through installing this program and all required components.	WindowBook
	Window Book Automation Scheduler (x64)
Tick Next to continue.	Window Book, Inc.

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

Please exit all applications before continuing with the installation.	WINDOW BOOK SOFTWARE END-USER LICENSE	* III
Some components may require that you restart your computer if files being updated are currently in use.	PLEASE READ THIS LICENSE CAREFULLY BEFORE USING THE ASSOCIATED SOFTWARE. BY USING THE SOFTWARE, YOU AGREE TO BE BOUND BY THE TERMS OF THIS LICENSE.	
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	I have read, understood and agreed to the terms of the End User License Agreement and so signify by clicking 'I accept terms of the License Agreement' and proceeding to use this product.	the
o install, you must accept the End User License Agreement.	☑ I accept the terms of the License Agreement	

Installation

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

(i) Please review importa	nt installation notes before continuing with setup.	
Window Book Automation Sch	eduler Release Notes	
Scheduler Version 7.9.69.69		
 Task #1094 - MDSM one 	configper site (SQL Script 064)	
Scheduler Version 7.9.68.69		
 Bug #1119 - eDM10x Da 	teTimeUpdated do not set as Utc datetime in some threads	
Case 13570 - Expand Mi	DSM PW API field	
Scheduler Version 7.9.67.69		
Case 13402 - MDSM UI t	weaks	
 Task #1103 - MDSM eDo exported file 	ocsEntryCreator. SentToPWN should be set only for eDocsEntr	y, created from
· Coro 12405 Dod multir	ela ambili cultulati an acta în 6947	
Click Next to continue.	This information supersedes your printed docur	mentation and manual

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

Window Book Automation S	cheduler (x64) Setup
Select features to install: Auto Postal Data Updates AWAM Rules Engine Export Statements IM Scan Manager Mail dat Merger/Spitter PPP Manager Process Manager Reference File TMS Manager	Feature description: Plug-Ins add functionality to the Scheduler

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

x	Entire feature will be unavailable
-	Entire feature will be installed on local hard drive
	Will be installed on local hard drive

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

Only install those plug-ins that the registration key received by Window Book applies to. <u>Contact</u> your local Window Book sales representative for more information about registration keys.

Window Book Automation Sc	heduler (x64) Setup
Select features to install:	Peature description: Plug-Ins add functionality to the Scheduler
	Disk space requirements: Available: 14,976 MB Required: 290,902 KB Remaining: 14,691 MB
Window Book, Inc.	< Previous Nest > Cancel

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.

Window Book Automation Sche	duler (x64) Setup
Microsoft SQL Server Options Please select how to connect to SQL Server SQL Server Source © I need to install SQL Server Express on this Machine I will use an existing SQL Server	Installation Options Help Select if you will use an existing SQL Server either on this or on a remote machine in your network or Install SQL Server Express on this machine.
Window Book, Inc.	<pre></pre>

• If the option 'I need to install SQL Server Express on this Machine' is selected, click the **Next** button to continue and proceed to <u>Step12</u> in this procedure.

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.

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 <u>step 12</u> in this procedure;

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

he chosen folder will contain files belonging to this roduct. Some files may be installed in other locations n your system.	Product install path: C:\Program File:\Window Book\Scheduler Browse
	C:\Program File:\Window Book\Scheduler Browse
	Available: 79,521 MB Required: 310,870 KB

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

NS Folder Options		
The chosen folder will be the root Tray Management γstem working folder		
	Select one or more types of scan	er MLOCR
	Rost Folder:	
	C/	Browse
	Disk space requirements:	
	Available: 15,603 MB	
	Required: 232,041 KB Remaining: 15,377 MB	

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

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.

Organize Include in library Share with New folder Support	🚱 🔍 🖡 « Local Disk (C:) 🕨 WBDotNet	•	Da	ita 🕨	TMSImport			• 1 9
> LUSPS_TEM_Data Name > LUSPS_TEM_Data Name > LUSPS_TEM_Data LUSPS_TEM_DDigitMLOCR > WBDotNet Cater_XML_DEfault > TMSImport WBL_Scan > Louput Cater_XML_Default > Output Output > WBDive VBL_Scan > Mult_Scan Input > Output VBL/Scan > Mult_Scan Input	Organize 🔻 Include in library 👻 Shar	e wi	th	•	New folde	r		
• •	 W8 W8DotNet Dats TMSImpart Carter_XML_IDDigitMLOCR Input Output Carter_XML_Default Input Output Output W8E_Scan Input Output 				Carter_XML_3 Carter_XML_0	l0DigitMLO	CR	
		*	*					m

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;

Choose the Start Menu group.	Start Menu group:
	Window Book .NET
A new program group will be created in your Start Menu to contain product icons. You may create icons for all users to see, or just for yourself.	Create shortcuts for: All users of this computer All users of this computer can see and use the product shortcuts Just me Drily you may see the product shortcuts Fin to Start Menu Pin to Task Bar Create a Desktop Shortcut

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

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 <u>requires a service-specific</u> <u>logon, separate from other Window Book software applications</u> to insure proper functionality (refer to <u>REQUIREMENTS</u> 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 Scher agon Information the following logon information is used by Window tok 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
---	---

Installation

1

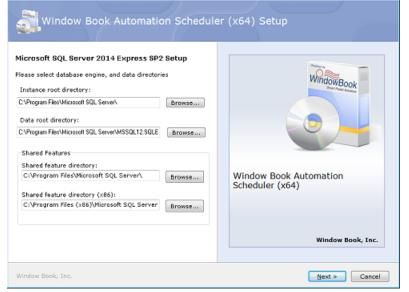
16. The Ready to update your system screen will display. Click the Next button to continue;

Ready to update your system.	
The InstallAware Wizard has collected all required information and is ready to update your system configuration.	WindowBook
	Window Book Automation Scheduler (x64)
Dick Nest to continue.	

17. If the option to install SQL Server Express was selected earlier (refer to <u>step 11</u> 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 <u>step 18</u> 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.

<u>Window Book strongly recommends</u> <u>using the defaults provided;</u> 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.

Window	w Book Automation Scheduler (x64) - InstallAware Wizard
0	MS SQL Management Studio - Information
	If you are using Microsoft SQL Server 2017 with your Window Book software, you will need to install SQL Server Management Tools separately so that you can properly manage your SQL data and permissions. (This is no longer included as part of the main MS SQL installation.)
	The download for this can be obtained through the Window Book website from the http://windowbook.com/Support/Downloads page.
	ОК

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

Window Book Automation Scheduler (x64) Setup is complete.	
'ou have successfully completed the Window Book automation Scheduler (x64) Installation Wizard.	WindowBook
	Window Book Automation Scheduler (x64)
	Window Book, Inc.

19. After a few moments, Window Book's Automation Scheduler will launch, and a *Not Registered* screen will display.

Enter the registration key received by Window Book and click the **Register** button;

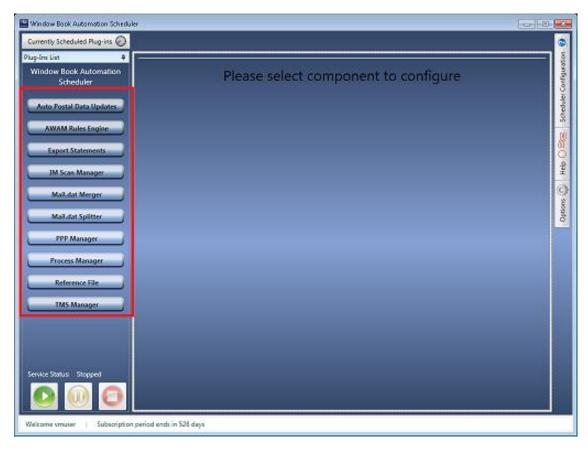
Not Registered
The license registration key for this product is either not valid or has not been validated yet.
If you have a registration key,
please paste it below and press the Register button.
Registration Information Registration Key: Metrosoft ACCCCT, BOOLICED, MEDIZARCTA ANA ON DACH MADE Register Register
If you do not have a valid registration key please contact Window Book, Inc. at 1-800-524-0380 to obtain one.

20. A *Customer Information* screen will display. Enter all required information (required fields are shaded in red). Click the **Done** button when finished;

Customer Information		22
The following customer informati	on is required to continue, fill in your int	formation and press the done button.
Company	User Contact Name	Registration/Purchase Contact Name
Is a non-USA address?	User Contact Phone	Registration/Puchase Contact Phone
L Is a non-USA address:	() Ext:	Ext:
Address Line 1	User E-Mail Address	Registration/Purchase E-Mail Address
Address Line 2		
	Registration/Purchase contact is th	e same
City		
State ZIP+4		
MA 💌		
		Done
		Done

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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);

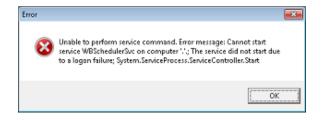


At this time, before attempting the installation of any other Window Book product's, the Scheduler's service must be started and run for a few moments. Refer to <u>Starting the Service -</u> <u>REQUIRED</u> for more information.



Starting the Service - REQUIRED

At this point, if during the installation the option to 'Start Service After Install' was not selected (recommended) – refer to <u>step 15</u> above, the service will be stopped. Attempting to start the service <u>may</u> 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');

Control Panel + Al	I Control Panel Items 🕨		✓ ← Search Control Panel
Adjust your computer's settir	ngs		View by: Small icons 🔻
🏲 Action Center	C Administrative Tools	autoPlay	🍓 Backup and Restore
🔽 Color Management	Credential Manager	😬 Date and Time	🝘 Default Programs
📑 Desktop Gadgets	🚔 Device Manager	Devices and Printers	Display
Ease of Access Center	Folder Options	🙀 Fonts	🔠 Getting Started
🝓 HomeGroup	🚨 Indexing Options	🐑 Internet Options	Keyboard
The Location and Other Sensor	A Moura	22 Matwork and Sharing Cantar	Motification Area Icone

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

				×
🔾 🖓 🕲 🖓 🖉 All Cont	trol Pa 🕨 Administrative Tools 💿 👻 😽	Search Administrative T	ools	٩
Organize 🔻		8=	•	0
🔶 Favorites	Name	Date modified	Туре	
💻 Desktop	Component Services	7/14/2009 12:57 AM	Shortcut	
〕 Downloads	🛃 Computer Management	7/14/2009 12:54 AM	Shortcut	
🔝 Recent Places	Data Sources (ODBC)	7/14/2009 12:53 AM	Shortcut	
	🛃 Event Viewer	7/14/2009 12:54 AM	Shortcut	
🥽 Libraries	🗟 iSCSI Initiator	7/14/2009 12:54 AM	Shortcut	
Documents	🔁 Local Security Policy	10/13/2014 4:53 PM	Shortcut	
🚽 Music	Performance Monitor	7/14/2009 12:53 AM	Shortcut	
🔛 Pictures	😥 Print Management	10/13/2014 4:53 PM	Shortcut	
🗃 Videos	💼 Services	7/14/2009 12:54 AM	Shortcut	
	system configuration	7/14/2009 12:53 AM	Shortcut	
🐏 Computer	😥 Task Scheduler	7/14/2009 12:54 AM	Shortcut	
🚢 Local Disk (C:)	😭 Windows Firewall with Advanced Security	7/14/2009 12:54 AM	Shortcut	
	📷 Windows Memory Diagnostic	7/14/2009 12:53 AM	Shortcut	
📬 Network	😹 Windows PowerShell Modules	7/14/2009 1:32 AM	Shortcut	
	•			
14 items				

Automation Scheduler™ System Guide

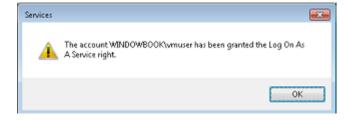
3. The *Services* window will display (this may take a few moments). Scroll down the list of services to the 'Window Book Scheduler' service. Right-click on the 'Window Book Scheduler' service and select 'Properties';

ile Action View	Help						
• 🔿 📅 🖾 🤇	2 🔒 🛛 📰 🕨 💷 🕪						
Services (Local)	Services (Local)	-					
	Window Book Scheduler	Name	Description	Status	Startup Type	Log On As	
		🔍 Volume Shadow Copy	Manages and impleme		Manual	Local Syste	
	Start the service	WEDGIER.	Enables Windows-base		Manual	Local Service	
		🚱 Window Book Scheduler	Start		Automatic	WINDOWB	
	Description:	C Mindows Anti-ation Technol			Manual	Local Syste	
	Task scheduler supporting Window	🔍 Windows Audio	Stop	Started	Automatic	Local Service	
	Book supplied Plug-Ins	🔍 Windows Audio Endpoint Bu	Pause	Started	Automatic	Local Syste	
		🔍 Windows Backup	Resume		Manual	Local Syste	
		🔍 Windows Biometric Service	Restart		Manual	Local Syste	
		🔍 Windows CardSpace	All Tasks		Manual	Local Syste	
		🔍 Windows Color System	All Tasks •		Manual	Local Service	
		🔍 Windows Connect Now - Co	Refresh -		Manual	Local Service	
		🔍 Windows Defender		Started	Automatic (D	Local Syste	
		🔍 Windows Driver Foundation -	Properties	Started	Manual	Local Syste	
		🔍 Windows Error Reporting Ser	Help		Manual	Local Syste	
		🎧 Windows Event Collector 📃			Manual	Network S	
		🔍 Windows Image Acquisition (Provides image acquisit		Manual	Local Service	
		🔍 Windows Installer	Adds, modifies, and re		Manual	Local Syste	
		🔍 Windows Management Instru	Provides a common int	Started	Automatic	Local Syste	
		🔍 Windows Media Center Recei	Windows Media Center		Manual	Network S	

 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.



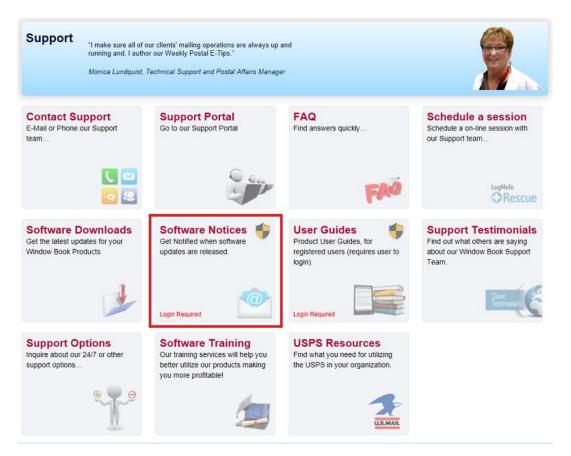
The procedure for granting the Log On account the necessary 'Log On As A Service right' only needs to be performed the first time the Automation Scheduler service is started.

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 <u>Step 11</u> in the installation procedure). A link to the SQL Server Management Studio is available on the <u>Automation Scheduler Software Downloads page</u> 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 (<u>Software Notices Support Page</u>). Registration is required.



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:

Window Book Automation Sch	neduler (x64) Setup
Choose the application folder. The chosen folder will contain files belonging to this product. Some files may be installed in other locations on your system.	Product install path:
	C\Program Files\Window Book\Schedulst Browse
	Disk space requirements:
	Available: 21,192 MB Required: 310,743 KB Remaining: 20,889 MB
	Install or Update PostalWeb Connector
Window Book, Inc.	< Previous Next > Cancel

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

Instructions for a new or first-time installation of the Automation Scheduler are provided under <u>INSTALLATION</u>.

Automation Scheduler (1a) & PostalWeb Connector (1b)	DAT-MAIL (2a) (server or standalone) & PostalWeb Desktop Dashboard ¹ (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 <u>after</u> 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 <u>Downloads page on Window Book's web site</u>.

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.

Automatio Scheduler		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. <u>It is necessary;</u> <u>however, to launch the Automation Scheduler, stop the service, and close the Automation Scheduler before beginning the installation of the updated version</u>.

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.

If additional or new plug-ins are being installed during an update to the Automation Scheduler, a new registration key will be required. <u>Contact your local Window Book Client Services</u> <u>Representative</u> 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.

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

Updating Your Software

hoose the application folder.	
he chosen folder will contain files belonging to this roduct. Some files may be installed in other locations n your system.	
	Product install path:
	C\Program Files\Window Book\Schedules Browse
	CAPtogram Files/Window Book/Schedulet Browse

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.

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.

For more information about updating PostalWeb Connector from within the Automation Scheduler, refer to <u>PostalWeb Connector Update</u> 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 <u>requires a</u> <u>service-specific logon</u>, <u>separate from other Window Book software applications</u> to insure proper functionality (refer to <u>REQUIREMENTS</u> 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;

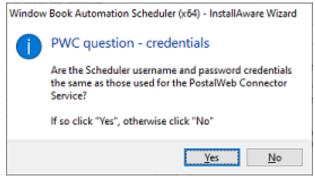
ogon Information he following logon information is used by Window ook Automation Scheduler (x64) Start Service After Install Windows Service Logon Information Computer/Domain Name: LBW7x64Svr Lsemame: vmuser Password:	Logon Information Help: Specify a user account to be used by the application, either 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
---	---

Automation Scheduler™ System Guide

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.

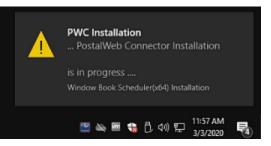
Window Book strongly recommends creating/using service-specific credentials for each Window Book product to insure proper functionality.

ogon Information for PostalWeb Connector he following logon information is used by PostalWeb connector Windows Service Logon Information Computer/Qomain Name: LBW10X64_2 Username:	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
---	---

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

3. 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...



Updating Your Software

< Previous Next > Cancel

	followed by the launch of the PWC's Installation N	of the 'verifying contents' screen Nizard.	InstallAware Wizard X The InstallAware Wizard is verifying the contents of this setup package. This may take a moment. Cancel
4.	Once the verification completes, the <i>Welcome to the Setup</i> <i>Wizard</i> screen for the PostalWeb Connector will display.	Window Book PostalWeb Connect Welcome to the Setup Wizard for Window Book PostalWeb Connector (tm) Service (x64). This wizard guides you through installing this program and all required components.	tor (tm) Service (x64) Setup
	Click the Next button to continue;		Window Book PostalWeb Connector (tm) Service (x64)
		Click Next to continue.	Window Book Inc.

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;

Please exit all applications before continuing with the installation.	WINDOW BOOK, INC.
Some components may require that you restart your computer if files being updated are currently in use.	MASTER SOFTWARE LICENSE AND SERVICES AGREEMENT
	This Master Software License and Services Agreement ("Agreement") is between Window Book, Inc. ("Window Book", "we", "our" or "us"), a Massachusetts corporation with principal offices located at 300 Franklin Street, Cambridge, Massachusetts 02139 and the party named above ("Customer", "you" or "your").
	I have read, understood and agreed to the terms of the End User License Agreement and so signify by clicking 'I accept th terms of the License Agreement' and proceeding to use this product.
to install, you must accept the End User License Agreement.	✓ I accept the terms of the License Agreement

Window Book, Inc.

Updating Your Software

6. 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;

noose the application folder.			
e chosen folder will contain files belonging to this oduct. Some files may be installed in other locations your system.	Product install path:		
	C: Program Files/Window Book/PWC	Browse	
	Disk space requirements: Available: 76.782 MB		
	Required: 261.748 KB Remaining: 76,527 MB		

7. 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;

hoose the Start Menu group.	Start Menu group:	
	Window Book .NET	
new program group will be created in your Start enu to contain product icons. You may create icons r all users to see, or just for yourself.	Create shortcuts for: ④ 실I users of this computer	
	All users of this computer can see and use the product shortcuts	
	 Just me Only you may see the product shortcuts 	
	Pin to Start Menu Pin to Task Bar	
	$\mathbf{\hat{h}}$	

Automation Scheduler ™ System Guide

8. The *Logon Information* screen will display. Do <u>NOT</u> 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.

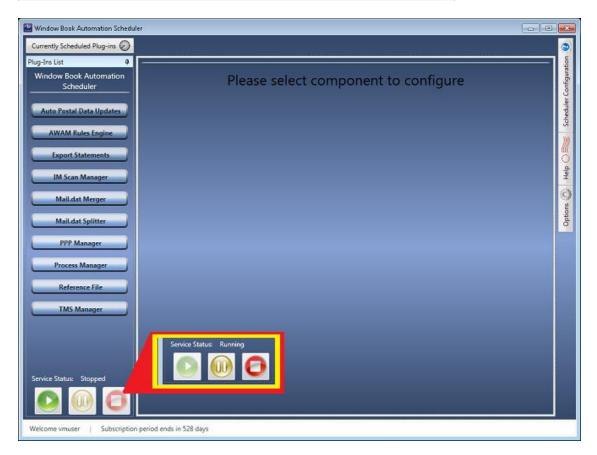
The 'Username' and 'Password' will automatically be populated with the credentials entered as part of <u>steps 1 and 2</u> above. Only change the credentials if necessary. Click the **Next** button to continue;

Window Book PostalWe	b Connector (tm) Service (x64)	Setup
Logon Information The following logon information is used by Window Book PostalWeb Connector (tm) Service (x64)	Logon Information Help:	
Btert Cervice After Install Windows Service Logon Information Computer/Domain Name: LBW10X64_2 Username: PWCSvc Bassword: •••••••	Specify a user account to be use application, either for running a logging onto other servers. The account used must have per access remote resources which i use Resources can be shared drives, drives, servers such as database	rmission to the service will
Window Book, Inc.		Next > Cancel nector (tm) Service (x64) Setup
9. The <i>Ready to update your system</i> screen will display.	Ready to update your system. The InstallAware Wizard has collected all required information and is ready to update your system configuration.	WindowBook
Click the Next button to install the software update;		Window Book PostalWeb Connector (tm) Service (x64)
	Click Next to continue.	Window Book Inc.
	Window Book, Inc.	< Erevious Next> Cancel

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. <u>This</u> is necessary for other Window Book products to run properly!

/indow Book PostalWeb Connector (tm) ervice (x64) Setup is complete.	News
ou have successfully completed the Window Book ostalWeb Connector (tm) Service (x64) Installation Vizard.	WindowBook
Clicking the 'Finish' button automatically launches the Automation Scheduler application. Please start and briefly run the Automation Scheduler service before attempting any other Window Book product installations. The service must be run to update the database version. Note that potential issues with other products can occur if the Automation Scheduler service is not run!	Window Book PostalWeb Connector (tm) Service (x64)
	Window Book Inc.



PLUG-IN SETUP & CONFIGURATION

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

- <u>Auto Postal Data Updates;</u>
- AWAM Rules Engine;
- Export Statements;
- IM Scan Manager;
- <u>Mail.dat Merger</u>;
- <u>Mail.dat Splitter</u>;
- <u>PPP Manager¹</u>;
- Process Manager;
- <u>Reference File</u>; 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 <u>PPP Manager Plug-</u> <u>in</u> 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

	TMS Manager					
Select	Select Configuration					
Configuration	About TMS Manager					
Expert View	Version: 7.3.14.29					
	Description: This plug-in is used to import Tray Management System (TMS) tray and pallet scan data into the Window Book wbDB SQL Server database. This feature requires access to Microsoft SQL Server.					
	Schedule Recommendation: This plug-in should be configured to run every few minutes.					
	TMS Manager - WBI Scan					
	TMS Manager - WBI Scan Add New Configuration Head Involution					
	🔀 Delete Selected Configuration					
Window Book, Inc	🐼 Back Next 😥 Cancel 🚫 Finish 🗸					

• 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.

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

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.

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;

Auto Postal Data Updates								
Select	Select Configuration							
Configuration	About Auto Postal Data Updates							
Expert View	Version: 7.7.0.24							
	Description: This plug-in is used to download postal facility drop ship data from the Window Book web site.							
	Schedule Recommendation: This plug-in should be configured to run once per day.							
Г	Add How Configuration							
L L	Expert View							
	Next Invoke Time: Never							
	The Auto Postal Data Updates is a Zero Configuration Component. The configuration should only be modified in Expert View at the direction of a Window Book Support Representative.							
	Save Selected Configuration							
Window Book, Inc	😳 Back Next 😳 Cancel 🚫 Finish 🗸							

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

Window Book does <u>not</u> 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.

	Auto Postal Data Updates							
Select	Expert View							
Configuration Expert View	Name: Auto Postal Data Updates							
Expert View	Description: This plug-in should be configured to run once per day.							
	Daily Recurs Every: Weekly 1 Day(s)							
	Monthly							
	Occurs Once At 3:00 PM							
	Starting At Ending At Occurs Every							
	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							
Window Book, Inc.	😳 Back Next 😳 Cancel 🚫 Finish 🗸							

Click the Next button to continue;

4. The *Step 1* screen will display:

	Auto Postal Data Updates
	Step 1
Step 1	Auto Postal Data Updates Data Download Plug-In Configuration Schedule ID Sc10417d-7392-4075-aceb-ce71a5c46cca Options Get Full Data Set Next Time Enable Plug-In Logging Get Full Data Set Next Time Send download failure notification to: 3 Folders
	https://dls.windowbook.com/LabelListDownload.svc
	Open Timeout (sec)
Window Book, Inc.	🕜 Back Next 🗭 Cancel 🚫 Finish 🗸

Enable Plug-in Logging (: 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 First is not typically required and would generally only be used for the first start of the plug-in;

Send Download Failure Notification To ¹ 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 : 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' S 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 Opdates Step 1 Auto Postal Data Updates Data Download Plug-In Configuration Schedule ID Sc10417d-7392-4075-aeeb-ce71a5c46ccs Options Image: Colspan="2">Image: Colspan="2">Colspan="2"Cols
	Drop Ship Data Web Service URI https://dls.windowbook.com/DropShipDownload.svc Labeling List Data Web Service URI https://dls.windowbook.com/LabelListDownload.svc Close Timeout (sec) 0 close Timeout
Window Book, Inc.	🕼 Back Next 😰 Cancel 🚫 Finish 🗸

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

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

Close, Open, Receive, and Send Timeout⁽¹⁾: 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.

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

	Auto Postal Data Updates
Select	Finished
Configuration Expert View	Schedule configuration finished
Window Book, Inc.	🐼 Back Select Other Config 🐼 Cancel 🚫 Finish 🗸

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 <u>Auto Postal Data Update</u> section above – or through the manual configuration of it – refer to <u>Manual Configuration</u> 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';

۵ ٵ	AT-MAIL	Editor with To	olbox						-	E	- 0 💌
File	Reports	PostalOne!	Utilities	ToolBox	Other Prog	rams Logistic	s Securit <mark>y</mark>	Help			
	2			u ()	Postage Rpts	1993 3602 (m.)			Check For Updates Update Program Get Support for DAT-M Online Learning Center Registration Product Information Make a Suggestion 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.

About DAT-MAIL			
WindowBook Automating Information	300 Franklin Street Cambridge, MA 02139 U.S.A Tel 800-477-3602 FAX 617-395-6902 www.windowbook.com sales@windowbook.com	DAT-MAIL Editor with Toolbox 21.19.07.15 Compiled 7/18/15 More About Database Version Information Database Version Info DAT-MAIL Registered Options Environment SQL Connection Info	
DAT-MAIL Editor with Toolhox 21.1	9.07.16 Compiled 7/18/19	USPS Drop Ship Database files as of: 5/31/2019 Destination File - Expires: 7/31/2019	n.
Copyright 2000-2019 by Window Boo Additional Information About General License	ik, Inc. All Rights Reserved. Trademark/Copyright: Statement	Zip File - Expires: 7/01/2019, Version: 276/01/00 WBLL v 900.01.00 Includes the following Labeling Lists: Published: 2/01/2019 Effective: 441/2019 Mendatory: 5/01/2019 Expires: 6/21/2019	E
MORE Abou	la.	Published: 401/2019 Effective: 5/81/2019	4
		Export	Gose
	Close		

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.

Control Panel • /	NI Control Panel Items + Administrative Tools	👻 🔯 🛛 Search Administr 🥬				
rganize 🔻 💽 Open Burn		3	- 🔟 🛛			
🙀 Favorites	Name *	Date modified	Type .			
	- Component Services	7/13/2009 11:57 PM	Shortout			
🗃 Libraries	Se Computer Management	7/13/2009 11:54 PM	Shortcut			
	Data Sources (ODBC)	7/13/2009 11:53 PM	Shortcut			
Computer	Event Viewer	7/13/2009 11:54 PM	Shortcut			
Network	SCSI Initiator	7/13/2009 11:54 PM	Shortcut			
1 LBUR-E32-0914	Local Security Policy	2/11/2013 6:14 PM	Shortcut			
	Performance Monitor	7/13/2009 11:53 PM	Shortout			
	Print Management	2/11/2013 6:14 PM	Shortcut			
	al ^m					

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 **0** to expand it;

le Action View Help								
	cheduler Numbe	r of events: 2,584 (!) New eve	ents available 🤇	3	_	_		Actions
Custom Views		Date and Time	_	Source ^ 4	Event ID	Task Categor		WBScheduler
Windows Logs	formation	8/19/2014 3:05:19	PM S	Auto Postal Data Updat		None	_	
	formation	8/18/2014 2:39:19		Auto Postal Data Updat		None	-	Event 0, Auto F
	formation	8/18/2014 3:05:0		Auto Postal Data Updat		None		
	formation	8/16/2014 8:03:3		MDSM - Mail.dat Servic		None		
	formation	8/16/2014 8:04:3		MDSM - Mail.dat Servic		None		
	formation	8/16/2014 8:04:5		MDSM - Mail.dat Servic	0	None		
	formation	8/16/2014 8:02:3		MDSM - Mail.dat Servic	0	None		
Western Deverthall	formation	8/16/2014 8:08:3		MDSM - Mail.dat Servic	0	None		
Cohercisticas	formation	8/16/2014 8:07:3		MDSM - Mail.dat Servic	0	None		
	formation	8/16/2014 8:05:3		MDSM - Mail.dat Servic		None		
	formation	8/16/2014 8:09:3		MDSM - Mail.dat Servic	-	None		
	formation	8/16/2014 8:09:50		MDSM - Mail.dat Servic		None		
	formation	8/16/2014 8:01:3		MDSM - Mail.dat Servic	0	None		
	formation			MDSM - Mail.dat Servic	0	None		
	formation	8/16/2014 7:56:3						
		8/16/2014 7:53:30		MDSM - Mail.dat Servic	0	None		
	formation	8/16/2014 7:54:3	J PM	MDSM - Mail.dat Servic	0	None		
							,	
Even	t 0, Auto Postal Data	a Updates v7.6.16.23					×	
F Ger	neral Details 🏉							
	Details 6	,						
n	new data updates are		V: New data succ	b28dce90-541d-433d-9b35-9ac9f00c2f0 essfully applied for transaction key 'e03- available.				
Le	og Name: W	/BScheduler					=	
		uto Postal Data Updates v7	Longed	8/19/2014 3:05:19 PM				
			Task Category;					
		formation	Keywords:	Classic			-	
	sen N	I/A	Compute <u>r</u> :	LBWin7x64.WindowBook.local				

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, <u>contact Window</u> <u>Book Technical Support</u>):

 Confirm the Automation Scheduler's service is running (refer to <u>Plug-in Setup & Configuration</u> 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, <u>Manual Configuration</u> 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, <u>Manual Configuration</u> 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 <u>not</u> 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 <u>not</u> 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 "<u>AWAM Setup Guide</u>" and the "<u>AWAM User Guide</u>". Documentation for the AWAM File Manager and Rules Engine is available in the "<u>AWAM File</u> <u>Manager Installation & User Guide</u>".

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;

🔛 Window Book Automation Schedul	er		
Currently Scheduled Plug-ins 🕗			۵
Plug-Ins List 9 Window End Automation		AWAM Rules Engine	Select Configuration
Auto Po Ata Updates	Select	Select Configuration	elect Con
	Configuration	About AWAM Rules Engine	- 30 - 10
AWAM Rules Engine	Expert View	Version: 8.0.1.17	
Export Statements		Description: The Automation Scheduler's AWAM Rules Engine plug-in reads and executes AWAM rules.	Help
IM Scan Manager		Schedule Recommendation: This plug-in should be configured to run every few minutes.	Ô
Mail.dat Merger		Add New Configuration	- Options
Mail.dat Splitter		Z Expert View	
PPP Manager		Next Invoke Time: Never	
Process Manager		💥 Delete Selected Cont	ouration
Reference File			

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

Window Book does <u>not</u> 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.

	AWAM Rules Engine
Stat	Expert View
Configuration Expert View	Name: AWAM Rules Engine Description: This plug-in should be configured to run every few minutes. © Daily Recurs Every: © Weekly 1 🚔 Day(s)
	C Accelly
	Starting At Ending At C Occurs Every S Minutes 12:00 AM (1) 11:59 PM (1) Start Date Thursday, March 03, 2016 (1) C End Date Friday, March 04, 2015 (1) R No End Date
Window Book,	Retries Count 0 🔹 Retry Seconds 300 🔹 🗆 Run at start-up

Click the **Next** button to continue;

Automation Scheduler ™ System Guide

3. 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.

	AWAM Rules Engine	
General Rule Manager Permissions	General	
	– General – Input folder for AWAM Rules Engine	
	Single Input folder Subfolders of selected folder	岁 Browse
	Output folder for invalid MD-files	
		问 Browse

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.

Browse For Folder Select Mail.dat Files Input Folder. Click the **OK** button when finished to close the dialog; 🗉 📬 Network 🖂 🌉 Lbw7x64svr_L 🗆 👤 WB 🎍 DropShip 🗉 鷆 IMPc6Mgr 🗉 퉲 Installs 🗼 mail.dat AutoErtPlan AWAM_Profiles 🗉 퉬 Customeri 🗉 퉬 Customer2 📙 Customer3 Make New Folder OK Cancel

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

×

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At this time, select whether or not the AWAM Rules Engine will monitor this single input or hotfolder (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);

	AWAM Rules	: Engine	_
General	General	eneral	_
Rule Manager Permissions	Input folder for AWAM Rules Engine \\Lbw7x64svr_1\WB\mail.dat\AWAM_Profiles @ Single Input folder O Subfolders of selected folder	📂 Bro	wse
	Output folder for invalid MD-files	De Bro	wse

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.

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

AWAM Rules Engine						
General	General					
Rule Manager Permissions	Input folder for AWAM Rules Engine					
	\\Lbw7x64svr_1\WB\mail.dat)AWAM_Profiles					
	C Single Input folder Subfolders of selected folder					
	First Date for scanning. All files prior to this date are skipped over and ignored.					
	<enter here="" text=""></enter>					
	Output folder for invalid MD-files					
	📂 Browse					

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

C Singl First Da						
<enter< td=""><td>text</td><td>her</td><td>e></td><td></td><td></td><td></td></enter<>	text	her	e>			
•	Fe	sbru	iary,	201	6	Þ
Su	Мо	Tu	We	Тh	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	1	2	з	4	5
6	7	8	9	10	11	12

1

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

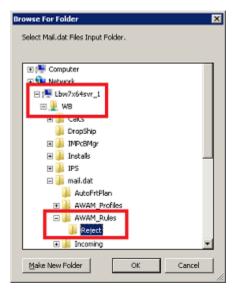
AWAM Rules Engine						
General	General					
Rule Manager Permissions	- General Input folder for AWAM Rules Engine					
Permosturis	\\Lbw7x64svr_1\WB\mail.dat\AWAM_Profiles O Single Input folder © Subfolders of selected folder	🞾 Browse				
	First Date for scanning. All files prior to this date are skipped over and ignored.					
	2/1/2016	15				
	Output folder for invalid MD-files					
		Drowse				

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

	AWAM Rules Engine						
General Rule Manager Permissions	General						
	C Single Input folder @ Subfolders of selected folder						
	First Date for scanning. All files prior to this date are skipped over and ignored. 2/1/2016 Output folder for invalid MD-files	15					
		芦 Browse					

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.

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

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

AWAM Rules Engine					
General	General				
Rule Manager Permissions	General Input folder for AWAM Rules Engine ULbw7x64svr_1\WB\maiLdat\AWAM_Profiles				
	C Single Input folder Subfolders of selected folder First Date for scanning. All files prior to this date are skipped over and ignored.				
	2/1/2016 Output folder for invalid MD-files				
	\\Lbw7x64svr_1\W8\mail.dat\AWAM_Rules\Reject				

7. 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.

AWAM Rules Engine					
Rule Manager Permissions				e Manager Permissions	
General Bule Massacc	Add	domain users to the list t	that are allow	ved to edit rules.	
Rule Manager Permissions		Domain/Machine Name	User Name		
	>	WINDOWBOOK	vmuser	Delete	
	-	Click here to add new it	em		
	_				

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

Enter the Doman/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.

AWAM Rules Engine						
General	_	Rule Manager Permissions				
	Add domain users to the list that are allowed to edit rules.					
Permissions	Rule Manager Permissions Domain/Machine Name User Name					
	>	WINDOWBOOK	vmuser	Delete		
	0			Delete		
DomanyMachine Name or User Name cannot be empty.			not be empty.			

AWAM Rules Engine					
Rule Manager Permissions					
Rule Manager	Add	Add domain users to the list that are allowed to edit rules.		ved to edit rules.	
Permissions		Domain/Machine Name	User Name		
	>	WINDOWBOOK	vmuser	Delete	
		WINDOWBOOK	Iburish	Delete	
	-	Click here to add new it	em		

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

Full access rights can also be granted or deleted from within the Rules Manager. Refer to the "<u>AWAM File Manager Installation & User Guide</u>" 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.

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.



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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.

Window Book does <u>not</u> 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 (WBBREXPORTAPSVC707.exe) located in the 'MDV' folder on the server (i.e. '\\...WB\MDV');

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 ٠ 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.

Automation Scheduler ™ System Guide

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.

Window Book does <u>not</u> 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.

IM Scan Manager			
Expert View			
Configuration	Name:	IM Scan Manager - Test	
Expert View	Description:	This plug-in should be config	ured to run every few minutes.
	© Daily C Weekty C Monthly	Recurs Every:	

Click the **Next** button to continue;

Plug-In Setup & Configuration

3. The Spoilage Import screen will display.

IM Scan Manager			
Spoilage	Spoilage Import		
Import Scan File Import Notification Tests	- Spoilage Import E Enable Spoilage Import Notify DatMail when spoilage is pending Input Spoilage Data Files Folder C:\WB\JMPcBMgr\InputFiles Processed Spoilage Data Files Archive Folder C:\WB\JMPcBMgr\ProcessedFiles Browse Browse D:>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>		
	Please select what kind of files you want to import O .TXT O .TXT O .SEL (Plugin only supports SEL's that contain an IM Piece Barcode) SEL Format IM Piece Barcode Start Position: 1 Field Length: 31 BOTH		
Window Book, Inc.	😮 Back Next 😰 Cancel 🚫 Finish 🗸		

If they are not already selected, enable (check) the option to 'Enable Spoilage Import' and 'Notify DAT-MAIL when spoilage is pending' **0**;

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' (a) and 'ProcessedFiles' (displayed as the 'Processed Spoilage Data Files Archive Folder' (a). 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 (2);

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 <u>Appendix 1</u> in this Guide.

Click the **Next** button to continue;

IM Scan Manager			
Spoilage	Spoilage Import		
Scan File Import	Spoilage Import Enable Spoilage Import Notify DatMail when spoilage is pending		
Tests	Input Spoilage Data Files Folder C:\WB\JMPcBMgr\JnputFiles	Browse	
	Processed Spoilage Data Files Archive Folder C:\WB\JMPcBMgr\ProcessedFiles	Dowse	
	Please select what kind of files you want to import C .TXT		

4. The Scan File Import screen will display.

IM Scan Manager		
Spalage Import Scan File Import Notification Tests	Scan File Import	

IM Scan Manager		
Spollage Import	Scan File Import	
Scan File Import Notification	Enable Scan File Import General Options Working Folder C:\W8\IMScanNanager\ScanFiles Browse Browse	
Tests	Data Files Archive Folder C:\WB\IMScanManager\ScanFiles\ScanFilesArchive Browse	

Select (check) the 'Enable Scan File Import' option $\mathbf{0}$ 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' O 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.

Browse For Folder
Select Working Folder for Whittier Tagger.
E Local Disk (C:)
Concentration Philade
PerfLogs
🗉 🍌 Program Files
🗉 🍌 Program Files (x86)
🕣 🍌 ProgramData
The lisers
🖃 🕌 WB
JE DropShip
E IMScanManager
E ScarFies
* Jiblas
H 🍺 IPS
🗉 🎍 mail.dat
HDROLIENT
E MOV
🗑 🕌 P3 🗾
Make New Folder OK Cancel

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.

Browse For Folder	×
Select Archive Folder for Whittier Tagger.	
E Stocal Disk (C:)	-
B	
E PerfLogs	
🕑 🌉 Program Files	
🕑 🕌 Program Files (x86)	
ProgramData	
I WS	
DropShip	
TIMPOBMor	
E 🔒 IMScanManager	
ScanFiles	
3 ScanFilesArchive	
🗉 🍌 Installs	
🗉 🔒 IPS	
🖃 🌗 mail.dat	
🗉 🍰 MDRCLIENT	
🗷 🔒 MDV	-
Mala New Baldes	
Make New Folder OK Ca	ancel
	16

IM Scan Manager			
Spoilage Import	Scan File Import		
Notification Tests	General Options Working Folder C:\WB\IMScanManager\ScanFiles Data Files Archive Folder		
	C:\WB\IMScanManager\ScanFiles\ScanFiles\Archive		
	WBMDScan C:\WB\JMScanManager\ScanFiles\WBMDScan Add Edit: K Remove		

Lastly, specify the folder(s) where the scanner will be writing its log files to (i.e. 'Scan File Locations'). 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.

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

Scanner Details	22
Scanner File Name	
Scanner Log File Location	
l	😥 Browse
	Save Cancel

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

 $\overset{\scriptstyle }{\overset{\scriptstyle }{\overset{\scriptstyle }{\overset{\scriptstyle }}{\overset{\scriptstyle }}}}$ 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;

Scanner Details		88
Scanner File Name		
WBIMDScan		
Scanner Log File Location		
C:\WB\IMScanManager\ScanFiles\WBMDScan		岁 Browse
	R Save	Cancel

IM Scan Manager			
Spoilage Import	Scan File Import		
Scan File Import Notification Tests	Enable Scan File Import General Options Working Folder C:\WB\IMScanManager\ScanFiles Data Files Archive Folder C:\WB\IMScanManager\ScanFiles\ScanFilesArchive Scan File Locations Drag a column header and drop it here to group by that column Name Input Folder WBMDScan C:\WB\IMScanManager\ScanFiles\WBMDScan Add Edit Remove		

K 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;

Tagger Settings	
Use M Scan Manager	
Whittier Setup	
Export Options Default Tagger export folder:	
belaut lagger export lobel.	
Export automatically after import Append Mail.dat Job Number to exported file name	Export Extraneous Line Info
Use Tagger's Shared Drive Drive List	Purge Old Exports
L	
	QK Qancel

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.

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

IM Scan Manager			
Spoilage Import		Notification	1
Scan File Import	- E-mail & Text Message Settings -		
	Send on success		Send on failure
Notification	SMTP Host		SMTP Port 3
	mail.windowbook.local 🤨		25
Tests	SMTP User Name	SMTP Password	
	Iburish	******	🔲 Enable SSL 🔕
	Send From	•	_
	DONOTREPLY@windowbook.com	6	
	Message Subject		•
	From Window Book IM Scan Manag	er Plug-In, Machine Name: LBV	V7X64SVR 💙

- 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)
- 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 (S);
- 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)^(G);
- Message Subject: Use the default displayed or enter a subject that will command some attention 2. 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:

Message Subject			
From Window Book IM Scan Manager Plug-In, Machine Name: LBW7X64SVR			
🗹 Send message via e-mail 🕕 🛛 🔞 🔛 Send Test Msg			ڬ Send Test Msg
Send To (separate multiple w	ith a semi-colon)		
lburish@windowbook.com;o	perators@windowbook.com;63055	51212@txt.att.net	3
	Send via text message to my phone (Note: charges may apply)		
Phone Number Service Provider			
AllTel 👻 Send Test Msg			
		4	E-mail message has been sent.

- Send Messages via Email: Select (check) the 'Sent message via email' option U;
- 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:

Phone Number 👩	Service Provider	-	0
8475551212	AllTel	€,	Send Test Msg
			S Text message has been sen

- Send Via Text Message : Select (check) the option to 'Send via text message to my phone';
- Phone Number ²: Enter the 10-digit phone number;
- Service Provider 69: 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 button¹ 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 successfully⁵;

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 <u>step 5</u> 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;

poilage Import	Tests
ican File Import	ts Run configuration tests the next time plug-in runs wious Configuration Test Results
Tests	IM Piece Barcode Manager v7.1.1.2 Configuration Test Results, 1/6/2012 12:40:08 File 'C:\Program Files\Window Book\Scheduler\IMPcBMgr\wbIMPcBMgr.exe' exist Successfully opened file 'C:\Program Files\Window Book\Scheduler\IMPcBMgr\wb Folder 'C:\WB\IMPcBMgr\InputFiles' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\WB\IMPcBMgr\InputFiles' (i Folder 'C:\WB\IMPcBMgr\ProcessedFiles' exists (indicates access to this disk drive) Successfully created a temporary file within folder 'C:\WB\IMPcBMgr\ProcessedFil Successfully created a temporary file within folder 'C:\WB\IMPcBMgr\ProcessedFil Successfully created a temporary file within folder 'C:\WB\IMPcBMgr\ProcessedFil Successfully connected to database 'wbDB' (indicates access to DB server). Successfully retrieved a row of data from database table 'IMBM' (indicates read ac
ndow Book, Inc.	Cancel Ninish a

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 <u>Plug-in Setup & Configuration</u> 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.

Window Book does <u>not</u> 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.

	Mail.dat Merger
	Expert View Name: Mail.dat Merger Description: This plug-in should be configured to run every few minutes. © Daily Recurs Every: © Weekly 1 × Day(s) © Monthly
	C Occurs Once At 12:00 AM T Starting At Ending At C Occurs Every 5 T Minutes 12:00 AM T 11:59 PM T
	Start Date Friday, June 12, 2015 C End Date Saturday, June 13, 2015 @ No End Date Retries Count 0 * Retry Seconds 300 * Run at start-up
Window Book, Inc.	😮 Back Next 🔯 Cancel 🚫 Finish 🗸

Click the **Next** button to continue;

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. "MDMerger").

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 (**): 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.

Mail.dat Merger		
Folders	Folders	
Data	Files & Folders Plug-In In-Bound Folder	
Options	C:\WB\MDMerger\PlugInInbound	

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;

Browse For Folder		×
Select the Folder to Monitor for New Mail.da	t Files.	
		4 III +
Make New Folder	OK Cancel	

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

Mail.dat Merger		
	Folders	٦
Folders	Files & Folders	_
Data	Plug-In In-Bound Folder	
Options	C:\WB\MDMerger\PlugInInbound	e
Data Validation	Merger In-Bound Folder	
Tests	C/\WB\MDMerger\Mergerinbound 2 Brows	ie

Plug-In Setup & Configuration

	Browse For Folder	×
Click the corresponding Browse button. A <i>Browse for Folder</i> 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	Browse For Folder Select the Folder where New Mail.dat Files are Delivered to the Merger.	×
'MergerInbound';	Mergerinbound Plugininbound Mitty	-
Click the OK button;	PI_TEM_Exports PDCV PfWatcher Make New Folder CK Cance	+

• **Merger Work Folder** : .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 <u>step 5</u> in this section for more information on the *Options* screen), and files are merged;

Mail.dat Merger		
Folders	Folders	
	Files & Folders	
Data	Plug-In In-Bound Folder	
Options	C:\WB\MDMerger\PlugInInbound	
Data Validation	Merger In-Bound Folder	
Tests	C:\WB\MDMerger\MergerInbound 2 Browse	
Notification	Merger Work Folder	
	C/WB/MDMerger/Merger/Work	

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.

Browse For Folder	×
Select the Folder where the Merger will process the files	
→ Di Venetres Data → Di Venetres Data → Di Coler	^
🎉 DropShip	
 IMPeBMgr Installs 	
maildat	
4 🎉 MDMerger	
Mergerlahound	
JergerWork	
PlugInInbound MDV	
PLTEM_Exports	
DCV	-
Make New Folder OK Canc	xel

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• **DAT-MAIL Import Folder** : 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.

	Mail.dat Merger
Folders	Folders
Data Options	Files & Folders Plug-In In-Bound Folder
Data Validation	C:\WB\MDMerger\PlugInInbound Browse Merger In-Bound Folder C:\WB\MDMerger\Mergerinbound 2 Browse
Tests Notification	Merger Work Folder
	DAT-MAIL Import Folder
	CAWB\mail.dat\incoming 💙 📂 Browse
Window Book, Inc.	🐼 Back Next 😨 Cancel 🚫 Finish 🗸

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);

DAT-MAIL Import Falder		
	C\\WB\mail.dat\incoming	岁 Browse

	Browse For Folder	×
Click the corresponding Browse button.	Select the DAT-MAIL Import Folder.	
A Browse for Folder dialog will display.		
	Usen TFM_Data	*
Locate and select the 'WB\mail.dat' folder	WB	
on the computer or server.	DropShip	
	▷ JMPcBMgr	
Click the Make New Folder button and	A mail.det	=
name the new folder 'incoming'.	Eailed	
, and the second s	🔒 incoming	
Click the OK button.	Processed QF_Edits	
	- Colored	
	Make New Folder OK Cano	a

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 <u>Appendix 1</u> in this Guide.

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

Mail.dat Merger				
Folders	Folders			
Data Options Data Validation	Files & Folders Plug-In In-Bound Folder \\Lbw7x64svr\wb\MDMerger\PlugInInbound Merger In-Bound Folder			
Tests Notification	\\Lbw7x64svr\wb\MDMerger\MergerInbound Browse Merger Work Folder			
	\\Lbw7x64svr\wb\mail.dat\incoming			
Window Book, Inc.	🖸 Back Next 😡 Cancel 🚫 Finish 🗸			

4. The *Data* screen will display:

Mail.dat Merger		
Folders	Data	
Data Options	Data Customer/Supplier Agreement (CSA) ID (optional)	
Data Validation	Merged Data Set Job ID Prefix TEST-Prefix-001	
Tests Notification	Merged Data Set Job Name (optional)	
	Merged Data Set Job Number (optional)	
Window Book, Inc.	Gancel Seck Next Gancel Seck	

- **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;

Mail.dat Merger				
es				
-				
S 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 Single Merge Database: Select (check) this option to merge SQL Server databases.
- Combine Segments: Select (check) this option to combine file segments.

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- 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.

Merge Files In This Order	
Default Order 🔹	
Default Order	
File Name Ascending	
File Name Descending	
File Date/Time Ascending	
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;

Merged Files Mail.dat Version	
Same as Source	-
Same as Source	
13-1	
14-1	
14-2	
15-1	

6. The Data Validation screen will display;

Mail.dat Merger		
Folders Data Options	Data Validation Data Validate Input Files None Validate Merged Files	
Data Validation Tests Notification	Validation Errors Halt Processing Validate Parent/Child Piece Counts	
Window Book, Inc.	😡 Back Next 😡 Cancel 🚫 Finish 🗸	

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

Compliance Level	
None	-
None	
Referential Integrity Only	
Field Level Validation	
IDEAlliance Conformance Testing	
PostalOnel® Level Testing	

- 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).

- 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.

Mail.dat Merger			
	Data Validation		
Folders Data Options Data Validation	Data Validation Compliance Level Validate Input Files Validate Merged Files Validation Errors Halt Processing Validate Parent/Child Piece Counts		
Tests Notification			
Window Book, Inc.	😮 Back Next 😨 Cancel 🚫 Finish 🗸		

Click the Next button to continue;

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 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;

	Tests
Options	
	nfiguration tests the next time plug-in runs
Previous C	onfiguration Test Results
	Mail.dat Merger v7.2.0.5 Configuration Test Results, 12/7/2011 2:25:06 PM
idation	File 'C:\WBDOTNET\Development\wbDotNet40\Binaries\TesterNPS.exe' exists (inc
	Successfully opened file 'C:\WBDOTNET\Development\wbDotNet40\Binaries\Test
	Folder 'Ci\' exists (indicates access to this disk drive).
ion	Successfully created a temporary file within folder 'C\' (indicates read-write acces
	Folder 'C\' exists (indicates access to this disk drive).
	Successfully created a temporary file within folder 'C\' (indicates read-write acces
	To be what what the first second s
	Folder 'CA' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'CA' (indicates read-write acces
	Folder 'C(\WB\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C(\WB\' (indicates read-write a
	sectors of sector of temporary me main reveal sectors, (markets) read-mine a
	Successfully connected to database 'wbDB' (indicates access to DB server).
ok. Inc.	😡 Back Next 💭 Cancel 🚫 Finis

8. 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 Mail.dat Merger plug-in.

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

Mail.dat Merger				
Spoilage Import		Notificatio	on	
Whittier Import	E-mail & Text Message Settings 🕕 🕼 Send on success		Send on failure	
Notification	SMTP Host mail.windowbook.local		SMTP Port 3	
Tests	SMTP User Name 4	SMTP Password	🔲 Enable SSL 🜀	
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) 0;
- 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 (S);
- 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)^(G); and
- Message Subject: Use the default displayed or enter a subject that will command some attention 2. 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:

Message Subject				
From Window Book Mail.dat Merger Plug-In, Machine Name: LBW7X64SVR				
🗹 Send message via e-mail 🕕 🛛 🔂 🗾 Send Test Msg				
Send To (separate multiple with	n a semi-colon)			
lburish@windowbook.com;op	Iburish@windowbook.com;operators@windowbook.com;6305551212@txt.att.net 2			
Send via text message to my phone (Note: charges may apply)				
Phone Number	Service Provider			
	AliTel	*	🔛 Send Test Msg	
		0	E-mail message has been sent.	

- Send Messages via Email: Select (check) the 'Sent message via email' option **0**; 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:

Phone Number 👩	Service Provider		
8475551212	AllTel	9 -	🍟 🔛 Send Test Msg
			S Text message has been ser

- 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 **2**.

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 6.

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 <u>step 8</u> 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 <u>Plug-in Setup & Configuration</u> 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.

Window Book does <u>not</u> 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.

	Mail.dat Splitter
Select	Expert View
Configuration Expert View	Name: Mail.dat Splitter Description: This plug-in should be configured to run every few minutes.
	Daily Recurs Every: Weekly 1 m Day(s) Monthly
	C Occurs Once At 12:00 AM 13 Starting At Ending At
	Occurs Every 5 Minutes 12:00 AM 11:59 PM 1
	C End Date Friday, May 15, 2015
	Retries Count 0 Retry Seconds 300 Run at start-up
Window Book, Inc.	😮 Back Next 😰 Cancel 🚫 Finish 🗸

Click the **Next** button to continue;

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").

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.

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;

Mail.dat Splitter			
Folders			
Data	- Files & Folders Plug-In In-Bound Folder		
Options	C:\WB\MDSplitter\PlugInInbound Browse		

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.

Browse For Folder	23
Select the Folder to Monitor for New Mail.d	at Files.
V/B Calcs DropShip DMPcBMgr Installs mail.dat MDMener	-
MDSplitter PlugInInbound MDV	Ŧ
Make New Folder	OK Cancel

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').

	Mail.dat Splitter
	Folders
Folders	Files & Folders
Options	Plug-In In-Bound Folder CAWBADSplitter/PlugInInbound Browse
Data Validation	Splitter In-Bound Folder
Notification	CAWB\MDSplitter\SplitterInbound

Click the corresponding Browse... button.

Plug-In Setup & Configuration

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

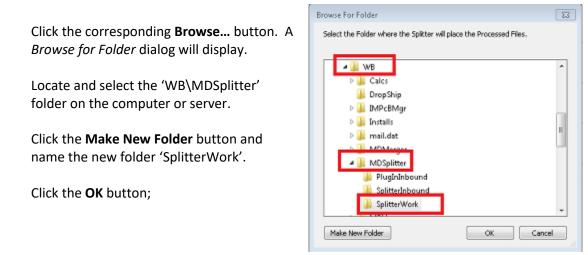
Click the **Make New Folder** button and name the new folder 'SplitterInbound'.

Click the **OK** button;

Browse For Folder	23
Select the Folder to Monitor for New Mail.dat Files.	
a 🎥 WB	^
Calcs	
🎉 DropShip	
IMPcBMgr	
Installs	
> 퉲 mail.dat	8
MDMerger	
4 퉲 MDSplitter	
PluaInInbound	
🎉 SplitterInbound	
MDV	-
Make New Folder OK	Cancel

Splitter Work Folder S: 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 <u>step 5</u> in this section for more information on the *Options* screen), and files are split.

	Mail.dat Splitter
Folders	Folders
Data	Files & Folders Plug-In In-Bound Folder
Options	C/WB\MDSplitter\PlugInInbound
Data Validation	Splitter In-Bound Folder CAWB\MDSplitter\SplitterInbound Browse
Custom Naming	Splitter Work Folder C:\WB\MDSplitter\SplitterWork Browse



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.

	Mail.dat Splitter	
Folders	Folders	
Data	Files & Folders	_
Options	Plug-In In-Bound Folder C:\WB\MDSplitter\PlugInInbound	rowse
Data Validation	Splitter In-Bound Folder	
Notification		rowse
Custom Naming	Splitter Work Folder	rowse
Custom Naming	DAT-MAIL Import Folder	
	C:\WB\mail.dat\incoming 4	rowse

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);

DAT-MAIL Import Folder	
C:\WB\mail.dat\incoming	岁 Browse

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;

Browse For Folder	— ×
Select the DAT-MAIL Import Folder.	
► D LISBS_TEM_Data	~
🔺 퉲 WB	
Calcs	
bropShip	
IMPcBMgr b B Installs	
A 📔 mail.dat	=
Eailed	
incoming	
Processed	
🎉 QF_Edits	
Make New Folder	OK Cancel

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Non-Automation/Custom Other Files Archive Folder (optional) S: 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').

	Mail.dat Splitter	
Folders	Folders	
Data	- Files & Folders Plug-In In-Bound Folder	
Options Data Validation	C\\WB\MDSplitter\PlugInInbound Brow	vse
Notification	C:\WB\MDSplitter\SplitterInbound	vse
Custom Naming	C\WB\MDSplitter\SplitterWark	vse
Custom Naming 2 Custom Naming	C\\WB\mail.dat\incoming 4	vse
3 Tests	Non-Automation/Custom Other Files Archive Folder (optional) C:\WB\mail.dat\NonAutoArchive S	vse
Window Book, Inc.	😡 Back Next 😥 Cancel 🚫 Finish	1

Refer to the Options screen discussed under <u>step 5</u> 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');

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 <u>Appendix 1</u> in this Guide.

	Mail.dat Splitter	
Folders	Folders	
Data Options Data Validation Notification Custom Naming 1 Custom Naming 2 Custom Naming 3	Files & Folders Plug-In In-Bound Folder VLbw7x64svr\wb\MDSplitter\PlugInInbound Splitter In-Bound Folder VLbw7x64svr\wb\MDSplitter\SplitterInbound Splitter Work Folder VLbw7x64svr\wb\MDSplitter\SplitterWork DAT-MAIL (mport Folder VLbw7x64svr\wb\mail.dat\incoming Non-Automation/Custom Other Files Archive Folder (optional)	Browse
Tests	\\Lbw7x64svr\wb\mail.dat\NonAutoArchive	Drowse
Window Book, Inc.	CO Back	Next 😳 🛛 Cancel 🚫 🛛 Finish 🗸

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

Plug-In Setup & Configuration

4. 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;

	Mail.dat Splitter
Folders Data Options Data Validation Notification Custom Naming 1	Data Data Customer/Supplier Agreement (CSA) ID (optional)
1 Custom Naming	

5. 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;

	Mail.dat Splitter	
Folders	0	ptions
Data Data Data Validation Notification	Processing Options Processing Options Drop Database on Complete Orop Database on Failure Shrink Database on Complete Use Auditing	 Generate P8C from PDR data Keep PDR when generating PBC Update Redirected Postal Facilities
Custom Naming 1 Custom Naming 2 Custom Naming 3 Tests	Use Original File Name Use Job Number Number of Days to Keep Log Files 7 Split Process Auto-Non-Auto Split Files Mail.dat Version Same as Source	Delete Mother Pallets All DNDC/DASF DSCF Mxd ADC Mxd NDC
Window Book, Inc.		😗 Back Next 😰 Cancel 🚫 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	
Auto-Non-Auto	-
5D/Non5D/Auto/Non-auto with exceptions	
Auto/Non-Auto/SD/non5D with exceptions	
WBI Token	-
Container Group	
Custom Tray Level (by Mail.dat HDR)	
Custom Tray Level (by List)	
Entry Point And Facility Type	
MPU	
	1

 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; "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.

Split Process	
5D/Non5D/Auto/Non-auto with exceptions	٠
Enter Container level values (separate by comma)	
R,S,T,U,V,X,Y,Z,AA,AB,AC,AD,AE,AJ,AR	

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 <u>Plug-in In-Bound folder</u> 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 <u>Non-Automation/Custom</u> <u>Other Files Folder</u>. 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.

Split Process	
Auto/Non-Auto/5D/non5D with exceptions	•
Enter Container level values (separate by comma)	
R,S,T,U,V,X,Y,Z,AA,AB,AC,AD,AE,AJ,AR	

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 <u>Plug-in In-Bound folder</u> 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.

When the Non5D split is used, the files are named using the following format: "Non5D-<originalfilename>". When the 5D split is used, the files are named using the following format: "5D-<originalfilename>". Non5D files are saved to the <u>Non-Automation/Custom</u> <u>Other Files Folder</u>. 5D files are saved to the normal output folder.

 WBI Token: This option allows Clients to split marketing mail between commingle and noncommingled drop ship. It provides the options to do both NDC and SCF 5D and also split out offshore. Split requirements are added to the HDR:UserOptionField.

public const string WBSPOffshore = "OFS"; /// <summary>Code for WBSP non-offshore mail</summary> public const string WBSPDomestic = "DOM"; /// <summary>Code for WBSP SCF 5-Digit only</summary> public const string WBSP_SCF5D = "SCF5D"; /// <summary>Code for WBSP NDC 5-Digit only</summary> public const string WBSP_NDC5D = "NDC5D"; /// <summary>Code for WBSP both SCF and NDC 5-Digit</summary> public const string WBSP_NDC_SCF_5Digit= "NS5D"; /// <summary>Code for WBSP all non-specific records</summary> public const string WBSP_Balance = "BAL";

- Container Group: Split source files by Container Group ID. Split name is Container Group ID;
- Custom Tray Level (by Mail.dat HDR): Split source files into automation trays at a particular presort level, and other automation and non-automation trays, using a user-supplied tray level code. The tray level code is supplied in the source Mail.dat's Header (.HDR) file, within the 'User Option' field. When the 'User Option' field is set to 'N', the source Mail.dat file set is moved directly to the DAT-MAIL import folder, as-is. Split name is "CustomAuto" for files containing specified automation tray level(s) and "CustomOther" for files containing remaining automation and non-automation tray levels;
- Custom Tray Level (by List): Split source files by picking out MxADC and MxAADC trays to commail/commingle, removing those trays from the Mail.dat that is to be imported into DAT-MAIL with the MxADC/MxAADC trays put into their own Mail.dats.

When this option is chosen, the screen will update and display a field where the user must enter a list of CSM Container Levels that they want to use to identify the trays for commail/commingle. The field is auto populated for the user; however, the values can be changed if necessary.

Split Process	
Custom Tray Level (by List)	
Enter Container level values (separate by comma)	
R,S,T,U,V,X,Y,Z,AA,AB,AC,AD,AE,AJ,AR	

The Mail.dats comprised of MxADC/MxAADC trays are saved to the <u>Non-</u> <u>Automation/Custom Other Files Folder</u>. The remainder of the Mail.dat gets saved to the <u>DAT-MAIL Input Folder</u>.

- Entry Point And Facility Type: Split source files by Entry Point and Facility Type. Split name is Entry Point ZIP + Facility Type code;
- MPU: Split source files by Mailpiece Unit ID. Split name is Mailpiece Unit ID;

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- 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.

Split Files Mail.dat Version
Same as Source 👻
Same as Source
19-1
18-1
17-2
17-1
15-1
14-2
14-1
13-1

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:

Mail.dat Splitter		
Folders Data Options Data Validation Notification Custom Naming 1 Custom Naming 2	Data Validation Compliance Level PostalOnel® Level Validate Input Files Validate Split Files Validate Parent/Child Piece Counts	
Custom Ivaming 3 Tests Window Book, Inc.	🐼 Back Next 😥 Cancel 🚫 Finish 🗸	

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

Compliance Level
None 👻
None
Referential Integrity Only
Field Level Validation
IDEAlliance Conformance Testing
PostalOne!® Level Testing

- 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.

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

Mail.dat Splitter		
Spoilage Import	Notifica	ation
spolage Import	E-mail & Text Message Settings 🕕	
Whittier Import	Send on success	Send on failure
Notification	SMTP Host	SMTP Port 3
	mail.windowbook.local	25
Tests	SMTP User Name SMTP Password	
	Iburish *******	🔲 Enable SSL 🔕
	Send From	
	DONOTREPLY@windowbook.com	
	Message Subject	
	From Window Book Mail.dat Splitter Plug-In, Machine Nam	e: LBW7X64SVR 💙

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

- Select (check) the option to 'Send on success' and/or the option to 'Send on failure) $\mathbf{0}$;
- **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)
- 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 (S);
- 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)^(G); and
- Message Subject: Use the default displayed or enter a subject that will command some attention 2. 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:

Message Subject			
From Window Book Mail.dat Splitter Plug-In, Machine Name: LBW7X64SVR			
🕼 Send message via e-mail 🕕 🛛 🙆 🔛 Send Test Msg		ڬ Send Test Msg	
Send To (separate multiple wit	Send To (separate multiple with a semi-colon)		
lburish@windowbook.com;op	erators@windowbook.com;63055	51212@txt.att.net 🙎	
Send via text message to my phone (Note: charges may apply)			
Phone Number	Service Provider		
	AllTel	·	🔀 Send Test Msg
·		0	E-mail message has been sent.

- 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)?

When the email addresses have been entered, click the **Send Test Msg** button³ 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 successfully⁴.

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

Phone Number 👩	Service Provider		
8475551212	AllTel	9 -	🍟 🔛 Send Test Msg
			S Text message has been ser

- 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 69; and
- When the phone number has been entered and the service provider selected, click the Send Test Msg button (1) 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).

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 <u>step 7</u> 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 <u>step 5</u> in this section.

	Mail.dat Splitter
Folders	Custom Naming 1
Data Options	Custom Naming Convention Prefix Text
Data Validation	End Position
Custom Naming 1 Custom Naming 2	Insert Position
Custom Naming 3 Tests	Suffix Text 6
	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 ✔

This screen is comprised of the following fields:

- **Prefix Text** Input optional text to prefix to the split name portion of the split Mail.dat file names;
- Start Position², End Position³, Insert Position⁴: 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**⁶: 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	
Folders		Custom Naming 2	
Data Options	Custom Naming Convention — Prefix Text		
Data Validation	Start Position		
Notification Custom Naming	End Position		
L Custom Naming 2	Insert Position		
Custom Naming 3	Suffix Text		
Tests	A	II values (Prefix & Suffix are optional) must be	🧹 Clear
		upplied if at least one is entered. Positions must be igits.	
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;

	Mail.dat Splitter
Folders	Custom Naming 3
Data	- Custom Naming Convention Prefix Text
Options Data Validation	Start Position
Notification	End Position
Custom Naming 1	Insert Position
Custom Naming 2	Insert Text
Custom Naming 3	Suffix Text
Tests	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 🗸

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;

Mail.dat Splitter		
Folders	Tests	
	Options	
Options Data Validation	File 'C:\WBDOTNET\Development\wbDotNet40\Binaries\TesterNPS.exe' exists (in Successfully opened file 'C:\WBDOTNET\Development\wbDotNet40\Binaries\Test	
Tests Notification	Folder "CA" exists (indicates access to this disk drive). Successfully created a temporary file within folder "CA" (indicates read-write acces	
Wouncation	Folder 'C\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C\' (indicates read-write acces	

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 <u>Plug-in Setup & Configuration</u> section in this Guide for more information).

PPP MANAGER PLUG-IN

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 <u>Contact</u> <u>Information</u> 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 <u>pre-defined</u> <u>processes</u> can be selected and scheduled with minimal configuration. The <u>custom processes</u> 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;

Window Book Automation Schedul	er		
Currently Scheduled Plug-ins 🕗			۲
Plug-Ins List # Window Book Automation		Process Manager	Expert
Scheduler	Select	Select Configuration	
Auto Postal Data Updates	Configuration	About Process Manager	Help (
AWAM Rules Engine	Expert View	Version: 8.0.34	9
Export Statements IM Scan Manager		Description: This plug-in is used for Postal Package Partner FTP or HTTP tracking. The plug-in can also be used to run a specific executable program in an automated manner.	Options
Mail dat Merger		Schedule Recommendation: This plug-in should be configured to run every few minutes.	
Mail plitter		Add New Configuration *	
PF. Ager		I Expert View	
Process Manager		Next Invoke Time: Never	
Reference File		Relete Selected Configuration	

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;

Window Book does <u>not</u> 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.

	Process Manager	
Click the Next button to continue;		
	Window Book, Inc. 🕜 Back Next 🗭 Cancel 🚫 Finish 🗸	

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 provided². The available processes are: PPP FTP Tracking; PPP HTTP Tracking; or PPP Import Agent.

	Process Manager
General	General
Process Start Options Notification Info	Schedule ID a23098d3-ef73-4ec1-908c-85cf388b2df8 Process Select Process to run: PPP HTTP Tracking PPP HTTP Tracking PPP HTTP Tracking PPP Import Agent Timeout Period (waiting for the process to exit): 10 = sec. 3
Window Book, Inc.	🕄 Back Next 🔯 Cancel 🚫 Finish 🗸

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;

Automation Scheduler ™ System Guide

4. 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?":

	Process Manager
General Process Start Options Notification Info	Process Start Options Process Start Options What to do if the process is already running? Leave the existing process and start a new one Exit without starting a new process Kill the existing Process and start a new one Command Line Arguments
Window Book, Inc.	😮 Back Next 😨 Cancel 🚫 Finish 🗸

- 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).

Window Book recommends using the default selection.

The 'Command Line Arguments' field is used for custom processes only.

Click the **Next** button to continue;

5. The *Notification Info* screen will display:

	Process Manager
General	Notification Info
Process Start Options Notification Info	The Process Manager runs a specific executable program in an automated manner. Due to the composition of this particular Plug-In, there is no Notification option available.
Window Book, Inc.	😮 Back Next 😡 Cancel 🚫 Finish 🗸

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 <u>Plug-in Setup & Configuration</u> section in this Guide for more information).

Custom Process

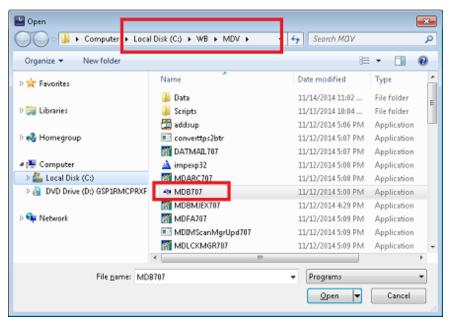
To configure a custom process, do the following:

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 clientspecific 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 **U**;

	Process Manager
General Process Start Options Notification Info	General Schedule ID a23098d3-ef73-4ec1-908c-85cf388b2df8 Process Select Process to run: PPP HTTP Tracking Custom Process CAWBIMDVMDB707.exe Category Contemposes CAWBIMDVMDB707.exe Timeout Period (waiting for the process to exit): 10 * sec.
Window Book, Inc.	😨 Back Next 😰 Cancel 🚫 Finish 🗸



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.

	Process Manager
General	General
Process Start Options Notification Info	Schedule ID a23098d3-ef73-4ec1-908c-85cf388b2df8 Process Select Process to run: © Predefined Process
(PPP HTTP Tracking
Window Book, Inc.	Timeout Period (waiting for the process to exit): 10 🔹 sec. 3

Specify the number of seconds to be used for the 'Timeout Period (waiting for process to exit)'. The default is 10 seconds **6**. 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?":

	Process N	Manager
General Process Start Options Notification Info	Proces Process Start Options What to do if the process is already running? Cleave the existing process and start a new or Exit without starting a new process Kill the existing Process and start a new one	ne
	Command Line Arguments	SCV /ADS /DMNRunOnce
Window Book, Inc.		🐼 Back Next 😧 Cancel 🚫 Finish 🗸

- 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. •



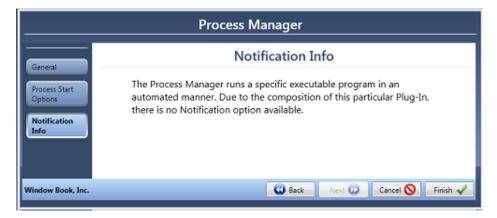
🚺 Window Book recommends using the default selection.

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



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 <u>Plug-in Setup & Configuration</u> 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.

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 <u>Contact Information</u> section of this Guide.

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.

Window Book does <u>not</u> 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;



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2. 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;

Window Book does <u>not</u> 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.

	TMS Manager	
Select	Expert View	
Configuration	Name: TMS Manager	
Expert View	Description: This plug-in should be configured to run every few minutes.	Click the Next button
	© Dally Recurs Every: O Weekly 1 ★ Day(s) O Monthly	to continue;
	O Occurs Once At 12:00 AM	
	Starting At Ending At C Occurs Every 5 Minutes 12:00 AM III 11:59 PM III	
	Start Date Friday, June 12, 2015 III C End Date Saturday, June 13, 2015 III C No End Date	
	Retries Count 0 🚊 Retry Seconds 300 🚊 🗆 Run at start-up	
Window Book, Inc.	🕢 Back Next 🗭 Cancel 🚫 Finish 🗸	

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- 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.

Browse For Folder 88 Select the Polder to Plonitor for New TMS Scare Files. # 🕌 WB 1.20 🕌 DropShip ⊨ 🎉 IMPcBMgr > 🏊 Installs 🛛 👪 mail.dat > 🎉 MDMerger 🛛 👪 MD Splitter MDV P1_TEM_Exports 🔉 PDCV PIWatcher > 🎉 PMW PostageSvcProvider 🎉 ReferenceFile_Inbound 3 ReferenceFile_Working

OK Cancel

鷆 Secure

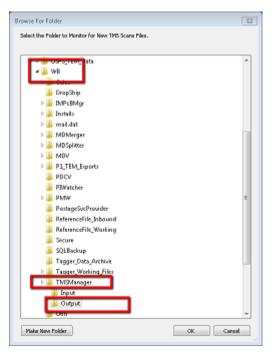
Piaka New Polder

👗 SQLBackup

Tagger_Dota_Archive
Tagger_Dota_Archive
Tagger_Utenting_City
Tagger_Utenting_City
Tagger_Utenting_City
Tagger_Utenting_City
Tagger_Dota_Archive

Click the **Browse**... button to create the necessary 'Output' folder under the 'TMSManager' subfolder. 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.



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 <u>Appendix 1</u> in this Guide.

Click the Next button to continue;

	TMS Manager
Folders	Folders
Processing Options Tests Notification	Files & Folders TMS Import Folder \\Lbw7x64sw1\wb\TMSManager\Input TMS Output Folder \\Lbw7x64sw1\wb\TMSManager\Output Browse
Window Book, Inc.	🕢 Back Next 😳 Cancel 🚫 Finish 🗸

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

TMS Manager		
Folders Processing Options Tests Notification	Processing Options Source Data Type Processing Options Source Data Type Processing Options Source Data Type Processing Options MLOCR Mailing Job Date Based On TMS File Import Time (12:00 AM for midnight) MLOCR Mailing Job Cut-off Time (12:00 AM for midnight) MLOCR Oldest Mail.dat Job to Process (days) Number of days to keep log files Populate Date Of Mailing From: O Carter IMSA file Creation Date	
Window Book, Inc.	😨 Back Next 🔯 Cancel 🚫 Finish ✔	

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

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WBI SCAN	•
WBI SCAN	
XML DEFAULT	
XML 10-DIGIT MLOCR	
FDR FORMAT	
Capstone XML Std Mail MLOCR	

- 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).

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

• MLOCR Mailing Job Date Based On ⁽²⁾: 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	•
TMS File Import Time	
Oldest Tray Scan Time	
Newest Tray Scan Time	
Ignore Mailing Job Dates	

- *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.

TMS Manager					
Folders Processing Options Tests Notification	Processing Options Source Data Type Pige Enable Plug-In Logging WBL SCAN 2 MLOCR Mailing Job Date Based On TMS File Import Time 3 MLOCR Mailing Job Cut-off Time 12:00 AM 2 (12:00 AM for midnight) 12:00 AM 2 MLOCR Oldest Maildat Job to 0 2 Process (days) 7 2 Number of days to keep log files 7 2 Populate Date Of Mailing From: 2 Oldest Scan Date Carter IMSA file Creation Date				
Window Book, Inc.	😡 Back Next 😡 Cancel 🚫 Finish 🗸				

- 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 S: 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 ^(G): 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 2**: 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;

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5. 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;

	Tests
Tests	
-	iguration tests the next time plug-in runs nfiguration Test Results
	File 'C:\WBDOTNET\Development\wbDotNet40\Binaries\TesterNPS.exe' exists (ini Successfully opened file 'C:\WBDOTNET\Development\wbDotNet40\Binaries\Test Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Folder 'C:\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Folder 'C:\WB\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Folder 'C:\WB\' exists (indicates access to this disk drive). Successfully created a temporary file within folder 'C:\' (indicates read-write acces Successfully connected to database 'wbDB' (indicates access to DB server).

6. 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.

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

	т	MS Manager	
Spoilage Import		Notificatio	on
sponage import	E-mail & Text Message Settings 🧲		
Whittier Import	Send on success		Send on failure
Notification	SMTP Host		SMTP Port 3
	mail.windowbook.local 🛛		25
Tests	SMTP User Name	SMTP Password	
	Iburish	******	🔲 Enable SSL 🔕
	Send From	0	
	DONOTREPLY@windowbook.com	6	
	Message Subject		•
	From Window Book TMS Manager	Plug-In, Machine Name: LBW	17X64SVR 💙

• Select (check) the option to 'Send on success' and/or the option to 'Send on failure) **0**;

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)
- SMTP User Name and Password: Enter the username and password that is used to access the SMTP server ⁽¹⁾. 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 (6);
- 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)^(G);
- Message Subject: Use the default displayed or enter a subject that will command some attention 2. 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:

Message Subject		
From Window Book TMS Ma	nager Plug-In, Machine Name: LBV	W7X64SVR
📝 Send message via e-mail 🄇		🔞 ڬ Send Test Msg
Send To (separate multiple wi	th a semi-colon)	
lburish@windowbook.com;o	perators@windowbook.com;63055	551212@txt.att.net 😢
	y phone (Note: charges may apply	
Phone Number	Service Provider	
	AliTel	 Send Test Msg
		④ E-mail message has been sent

- 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:

Phone Number 👩	Service Provider		0
8475551212	AllTel	U	Send Test Msg
			O Text message has been sent

- Send Via Text Message: Select (check) the option to 'Send via text message to my phone'
 ;
- Phone Number: Enter the 10-digit phone number ²;
- Service Provider: Select the Service Provider from the drop-down list provided 69; 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

i)

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

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 <u>step 6</u> 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 <u>Plug-in Setup & Configuration</u> 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;

🚱 🥝 🎒 🔚 🖸 🔺 🕨 12:26 PI	
1220 PI	

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;

		• MDV • Data • Click He		~ ~
rganize 🔻 Share with 👻	New f			. 💷
	-	Name ~	Date modified	Type :
📬 Network		DMMailDatSQLbackups	3/7/2017 11:45 AM	File folder
E 📜 AGRIGW10X64A		📔 maildat	3/7/2017 12:41 PM	File folder
E N AGRIGW10X64B		Semaphores	3/7/2017 12:41 PM	File folder
		DMD8 Service.lock	3/7/2017 12:32 PM	LOCK File
E 🖳 LBWIN7X6402		M9413act	11/13/2014 3:04 PM	Text Document
⊡ 🖳 wb			11/13/2014 3:04 PM	Text Document
Calcs		M9413tray	11/13/2014 3:04 PM	Text Document
DropShip		mdbatrep.tps	3/7/2017 1:18 PM	TPS File
🗉 퉲 IPS		mdbfgh.tps	3/7/2017 1:18 PM	TPS File
🗉 퉲 mail.dat		mdbmdc	3/7/2017 1:17 PM	Configuration settings
🖲 🚹 MDRClient		a mabreg	3/7/2017 1:17 PM	Configuration settings
🖃 퉲 MDV		mdcsaof.tps	3/7/2017 1:17 PM	TPS File
🛛 퉲 Dətə		MDDataBaseSyrlog_20170307	3/7/2017 7:59 PM	Text Document
in scripts		MDDataBaseSwlog_20170308	3/8/2017 8:06 PM	Text Document
PDCV		mdjbrycf.tps	3/7/2017 12:41 PM	TPS File
E 🕌 PMW		MDPieceDetail.dat	2/1/2016 9:49 AM	DAT File
Secure SOLBackup		1774		
SQLBackup		MDPSQL2MSSQL	11/4/2016 11:30 AM	Configuration settings
MBDEMO1W7X64		mtlfile.tps	11/13/2014 3:04 PM	TP5 File
E 🖳 OLEGW10X64TEST		NetGovnr.Tps	3/7/2017 1:18 PM	TP5 File
E I RRDBCSWIN7X32		TAGPRINT.tps	11/13/2014 3:04 PM	TPS File
E 👰 SPTESTW7X32		tagtfd.tps	3/7/2017 12:41 PM	TPS File
-	v			

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

Data			-	
🌀 🕞 🗸 🚺 🔂 🕤	02\wb\MDV\Data	💌 🔯 🛛 Search Data		
Organize 👻 Share with 👻	New folder		💷 👻 🛄	0
	▲ Name ^	Date modified	Туре	St
🛛 📬 Network	DMMaiDatSOLba	dups 3/7/2017 11:45 AM	File folder	
🗉 🌉 AGRIGW10X64A	maildat	3/7/2017 12:41 PM	File folder	
E 🌉 AGRIGW10X648	Semaphores	3/7/2017 12:41 PM	File folder	
🗄 🎼 AGRIGW10X86A				
III AGRIGW10X868 IIII IIII IIII III III III III III III III III III	DMD8_Service.lo	ck 3/7/2017 12:32 PM 11/13/2014 3:04 PM	LOCK File Text Document	
E 🖳 LBWIN7X6402	1776			
🖃 🌺 wb	M9413sack	11/13/2014 3:04 PM	Text Document	
Calcs	M9413tray	11/13/2014 3:04 PM	Text Document	
bropShip	mdbatrep.tps	3/7/2017 1:18 PM	TPS File	
🖲 퉲 IPS	mdbfgh.tps	3/7/2017 1:18 PM	TPS File	
🗉 퉲 mail.dat	🐑 mdbmdc	3/7/2017 1:17 PM	Configuration settings	
MDRClient	🐑 mdbreg	3/7/2017 1:17 PM	Configuration settings	
E MDV	mdcsaof.tps	3/7/2017 1:17 PM	TP5 File	
🖬 🕌 Data	MDDataBaseSvrk	og_20170307 3/7/2017 7:59 PM	Text Document	
PDCV	MDDataBaseSvrk	og_20170308 3/8/2017 8:06 PM	Text Document	
I B PMW	mdjbrycf.tps	3/7/2017 12:41 PM	TPS File	
Secure	MDPieceDetail.da		DAT File	
SQLBackup	MDPSOL2M5SOL	11/4/2016 11:30 AM	Configuration settings	
Utils	mtlfile.tps	11/13/2014 3:04 PM	TPS File	
T INBDEMO1W7X64	NetGovnr.Tps		TPS File	
E SUBSCHOT		3/7/2017 1:18 PM		
RRDBCSWIN7X32	TAGPRINT.tps	11/13/2014 3:04 PM	TPS File	
	tagtfd.tps	3/7/2017 12:41 PM	TPS File	
	<u> </u>			•

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.

Window Book DAT-MAIL (x64	i) - MSSQL SF Setup	
Choose the application and data folders - Workstation The chosen folders will contain files belonging to this product. Some files may be installed in other locations on your system. NOTE: PM Datapath does not need to be changed on a Standalone installation. For a SERVER Installation however, the PM Datapath should be set to the shared data directory of the program. (NOTE: The PM Datapath is for Destination and Labeling List data and/or Statement Data).	Product install path: C:\WB\MDV Product data path: \\LBWIN7x6402\WB\MDV\Data Product PM Data path: \\LBWIN7x6402\WB\PMW\Data Disk space requirements: Remaining: 81,339 MB Required: 961,855 KB Available: 80,339 MB	Browse Browse
Window Book, Inc.	< <u>Previous</u>	Cancel