




WindowBook
Automating Information. Growing Prosperity.

DAT-MAIL BT 850 TAGGER

Quick Start & Reference Guides

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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 company logo	Revision	Document cover	Replaced existing Window Book logo with new company logo (Feb. 2017)
Updated copyright information	Revision	Throughout document	Updated copyright information recorded under ABOUT THIS GUIDE and in document's page footers.

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GETTING STARTED



DAT-MAIL's Tagger interface is currently a standard feature of DAT-MAIL software versions 11.15.17.05 or newer.



The use of the Automation Scheduler and IM Scan Manager Plug-in (version 8.0.2.86 or newer) is required for imports of BT-850 data with DAT-MAIL versions 11.15.17.05 or newer.

OVERVIEW

Window Book's interface to the Whittier Mailing Products (WMP) model 850 Barcode Tagger allows mailers to do the following:

- Transfer Mail.dat information to the Tagger via a network share or USB flash drive;
- When a network share is used to transfer data to a Tagger, Mail.dat information can be made available to the Tagger automatically whenever a Mail.dat file is imported;
- If the mailer has only one Tagger, they can also use the Tagger's local share to exchange information with DAT-MAIL; and
- Mail.dat files can be manually exported from DAT-MAIL's top-line menu or *Advanced Navigator* screen. This is done if:
 - The mailer is using USB flash drives to provide job information to the Tagger;
 - Major changes are made to Mail.dat files that affect extraneous line data; and
 - If the mailer wants to direct the file to a specific Tagger when multiple Taggers are present.
- Update extraneous line information during so that extraneous line of the Tagger's tray tags will have the same information that DAT-MAIL's own tray tags have;
- Provide the Tagger with single piece data so that it can reprint a lost or damaged tray tag by scanning an Intelligent Mail barcode on a mail piece or "split" trays by scanning an original tray followed by the barcode on the first piece of mail in the new tray. A 2D scanner such as the Honeywell 1900 is needed for these functions and this will only work on jobs with unique tray and piece barcodes. These are extremely valuable features so for the purposes of this guide, we will assume that most users will have access to a 2D scanner; and
- Import data generated by the Tagger for sibling or "split" tray tags and pallet labels and add this data to the correct Mail.dat file. This import is done using Window Book's Automation Scheduler IM Scan plug-in.

Once the Tagger retrieves a Mail.dat file, it can perform a variety of tasks using that data, such as:

- Advanced Full Service Options (AFSO) for DAT-MAIL users:

Getting Started

- Printing the extra “sibling” tags needed for “overflow” sacks, trays and pallets then updating Mail.dat files with those extra trays, sacks and pallets;
- Splitting the contents of one tray into two trays. This is similar to creating sibling tray tags except that split trays can be copalletized by third parties and will usually show up on all PostalOne! reports;
- Reprinting lost or damaged tags by scanning an IMb of a mail piece in the tray with the missing tag;
- Deleting trays of mail being withdrawn from a mailing due to shortage or spoilage; and

Other Mail.dat functionality:

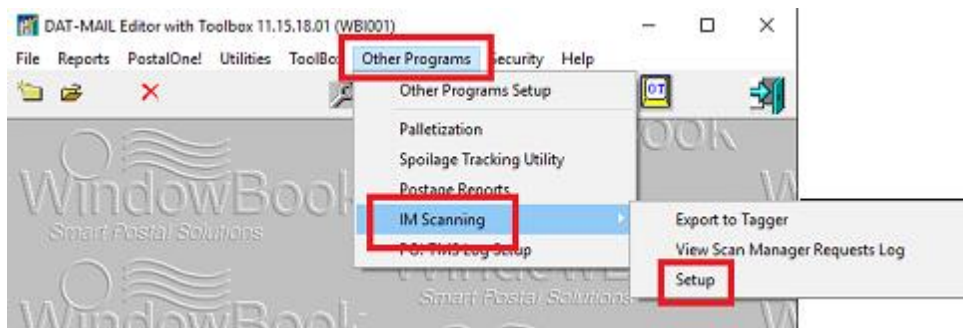
- Batch printing tags for the whole job;
- Printing the tray tags needed for a pallet by scanning the pallet placard;
- Printing tags one at a time in-line with production; and
- Logging of all tray tags printed in-line with production or produced from a pallet placard scan. DAT-MAIL marks these ‘ready to pay’ to provide automated management of partial mailings!

Earlier Tagger models will need to be upgraded to the Model 850 series to use this interface and perform the functions described in this document. DAT-MAIL’s Tagger interface is currently a standard feature of DAT-MAIL software versions 11.15.17.05 or newer. The use of the Automation Scheduler IM Scan Plug-in is required for importing Tagger data for DAT-MAIL versions 11.15.17.05 or newer.

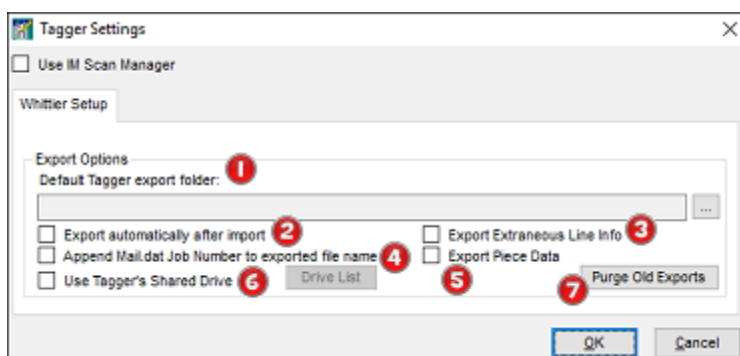
QUICK START GUIDE

DAT-MAIL DATA TRANSFER SETUP

1. Connect your Taggers: Have your company's Network Administrator setup a share on your network and connect your Taggers to it (refer to [APPENDIX 1](#) in this Guide for instructions). If your company prefers to use the share built into the Tagger itself, refer to [APPENDIX 2](#) in this Guide for those instructions. If you plan to use a USB drive to transfer data instead of a share, please refer to the Reference Guide section for setup and operating instructions;
2. If you are using a 2D imager/scanner to scan IMb's for reprinting tray tags or splitting trays, make sure it is configured properly to read IMb's and add a CRLF to the end of each scan. If you are using a Honeywell 900 or 902 imager, you can scan the barcodes found in [APPENDIX 4](#) in this Guide to set it up;
3. Within DAT-MAIL (all program functions should be closed), select 'Other Programs' from the top-line menu bar. Select "IM Scanning", then "Setup";



4. Select the folder you will be exporting your Tagger data to ¹. This will either be the network share you setup for the Tagger or the UNC path name of the Tagger's own share;



- If you are using a share either on your network or the Tagger to exchange data, check off the "Export Automatically after Import" ²;

- If you use DAT-MAIL to print tray tags today, check off “Export Extraneous Line Info”³ so the same information will print on the extraneous lines of the tags printed by the Tagger;
 - If you cannot rely on your Mail.dat files to include the job number in the file name, check off the “Append Mail.dat Job Number to exported file name” check box⁴ (recommended);
 - If you have a 2D USB scanner, you can reprint missing or damaged tray tags in Full Service jobs by just scanning a mail piece from the tray. To locate a tray based on an IMb scan, the BT-850 must have single piece data. Selecting the “Export Piece Data” option will provide that data (refer to call out ⁵ in the image above) – refer to the [EXPORT PIECE DATA](#) section in this Guide for more information;
 - If you have more than one Tagger and are using the Tagger’s shares instead of a single share on your own network to exchange data, check the “use Tagger’s Shared Drive” checkbox⁶ and look at the Reference Guide for information on how to create a list of Tagger’s and their mapped drives or UNC path names;
 - If you wish to conserve disk space, purge any old Tagger export files by clicking the **Purge Old Exports** button (refer to call out ⁷ in the image above). A separate screen will display asking you to enter or specify a date that will act as a cut-off date for selecting and purging existing files (refer to [Remove Old Tagger Files](#) in this Guide for more information);
5. Click the OK button to save your settings. You are ready to set up the Tagger side of the interface!



Earlier versions of DAT-MAIL allowed you to enable or disable a “Split Tray” option, so that your Standard trays can be handled by DSMS and third party copalletization programs. Beginning with DAT-MAIL 11.15.17.05, “Split Tray” is no longer an option you can enable or disabled in the ‘Tagger Settings’ screen. This option is enabled in the system at all times.

TAGGER DATA TRANSFER SETUP

Configure Tray Tag Type and Mailer ID

1. From the Tagger's *Main Menu* screen, press "1" for On Demand Tags;
2. The Tagger's *On Demand Tags* screen will display. Select "5" for System Settings;
3. The Tagger's *System Settings* screen will display. Select "1" for Tag Selections;
4. The Tagger's *Tag Selections* screen will display. Select "1" for Tray Tag Type;
5. Select "1" again to set the tray tag type to "IMTL";
6. From the *Tag Selections* screen, select "7" for Tag Options;

7. The *Tag Options* screen will display. Select "1" to set the 'Extraneous Line' to "YES" if DAT-MAIL has been set to export extraneous line information (refer to [step 6](#) under [DAT-MAIL DATA TRANSFER SETUP](#), above);
8. Press the "PREV" button until the *Main Menu* screen is displayed;
9. From the Tagger's *Main Menu* screen, press "1" for On Demand Tags;
10. The Tagger's *On Demand Tags* screen will display. Select "3" for Mailer Information;
11. The Tagger's *Mailer Information* screen will display. Select "1" to enter a MID and enter one of your company's six or nine digit MID's. We recommend that you use a MID that is not usually used to generate tray tags to avoid any possible conflict with other data sources; and
12. You can now press "PREV" to get back out and display the *Main Menu* screen.

Set Log File Location

1. To do this you must load a Mail.dat file. Go to the *Mail.dat Function* screen;
2. From the *Mail.dat Function* screen, select "7" for AFSO 3.4 (DAT-MAIL);
3. The *AFSO 3.4 (DAT-MAIL)* screen will display. Option 6 displays the *Log File Location* screen and lets you set whether the files the Tagger will export to DAT-MAIL will be on a network share (option 1), the Tagger's own share (option 2) or on a USB drive (option 3). Select options 1 or 2 as appropriate; and
4. The first time you try to print a sibling tray tag or split a tray, the Tagger will ask you if you want to create the folder. This is always going to be the '\LOGS' folder of the share the Tagger is reading the data from.

USING THE DAT-MAIL/TAGGER INTERFACE: TAGGER

Retrieving the Mail.dat File for a Job (Required for All functions)

To retrieve the Mail.dat file for a job, the Mail.dat file must be loaded. To do so, perform the following:

1. At the Tagger's *Main Menu* screen, select "2" for Get Tag File;
2. The *Tag File* screen will display. Select "7" for List Files; and
3. The *List Files* screen will display. Select "1" to search folder by Job Number. Enter the numeric portion of the Job number you are looking for and you will see all full and partial matches. If you enter the whole job number, this usually will list all versions for the job. Select the one you want.

Print Sibling Tags

Sibling tags are used to inform the USPS that you added an additional tray or pallet to hold mail that originally was supposed to fit in one tray or on one pallet. These records are used to provide bar codes to the USPS Full Service program but do not indicate how many pieces are in these trays or pallets.

- Retrieve Job (starting at the Main Menu screen, select "2", then "7", then select job);
- Select "2", then "7", then "1" (starting at the Print Tag File screen, select "2" to go to the Mail.dat Functions screen, select "7" for DAT-MAIL functions, and select "1" to generate sibling from scanned tag; and
- Scan the original tray tag that overflowed and a new tray tag will be printed. Put this tag in the overflow tray. If you print pallet labels using the Tagger, you can do the same thing with a sibling pallet.

Split a Tray

This is similar to creating a sibling but the data sent will look like two regular trays with counts and weights (which is not the case with a sibling). You will need to do this for DSMS processed drop ship mailings or when trays are copalletized by third parties.

- Retrieve Job (starting at the Main Menu screen, select "2", then "7", then select job);
- Press 273 (starting at the Print Tag File screen, select "2" to go to the Mail.dat Functions screen, select "7" for DAT-MAIL functions, and select "3" to split a tray);
- Scan the original tray tag that overflowed and a new tray tag will be printed (2D scanner/imager required);
- Scan the IMb on the first mail piece you put in the new tray; and
- Put this tag on the overflow tray. You cannot split pallets at this time.

Delete a Tray

Sometimes mail must be removed after presort due to spoilage, shortage or a client simply wants to pull that mail out for some other reason. When entire trays are to be removed, you can remove them from the mailing with the DELETE TRAY function as long as you have not yet exported a "ready to pay" update to PostalOne! that includes that tray.

- Retrieve Job (starting at the Main Menu screen, select "2", then "7", then select job);
- Press 276 (starting at the Print Tag File screen, select "2" to go to the Mail.dat Functions screen, select "7" for DAT-MAIL functions, and select "6" to delete a tray); and
- Scan the tray tag you want to remove from the mailing.

Reprinting Tray Tags by Scanning a Piece Barcode

- Retrieve Job (starting at the Main Menu screen, select "2", then "7", then select job);
- Go to Mail.dat Menu (press 2);
- Go to the DAT-MAIL Function Menu (press 7); and
- Select option 4 for Reprint Tray Tag from IMb Scan". You can scan any piece of mail in the tray and the replacement tag will be printed. **NOTE:** This feature only works on jobs that have been assigned unique piece bar codes - though the individual pieces do not need to qualify for the Full Service discount.

Printing All Tray Tags for a Pallet by Scanning a Placard Barcode

This is handy if you don't want to print tags one at a time during production or batch print them before the job starts. This option lets you print the tags you need in an easy-to-manage "block" to maximize labor savings and minimize capital investment on equipment.

- Retrieve Job (starting at the *Main Menu* screen, select "2", then "7", then select job);
- Go to Mail.dat Menu (press 2); and
- Select option 3 for Print Tray Tags from Pallet Scan" – scan the pallet placard. You will be asked if you want to print n tags where n is the number of tags on the pallet.

USING DAT-MAIL/TAGGER INTERFACE: DAT-MAIL

Exporting Data to the Barcode Tagger

Data for the Tagger will automatically be exported to the share you created and entered in the setup program whenever DAT-MAIL imports a Mail.dat file.

Importing Data from the Barcode Tagger

Importing data is done using Window Book's Automation Scheduler with IM Scan Manager plug-in (refer to the [Importing](#) section in this Guide for more information).

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REFERENCE GUIDE

TAGGER/DAT-MAIL INTERFACE

How It Works

The WMP Barcode Tagger can read Mail.dat files either from a network share, its own share or a USB flash drive. If you are generating sibling tags for overflow trays with the Barcode Tagger, we recommend that you use a “share” to exchange data with DAT-MAIL. If you have only one Tagger that share can be on the Tagger itself (refer to [Appendix 2](#) for setup instructions). If you have multiple Taggers, you should use a share on your network (refer to [Appendix 1](#) for setup instructions). A share is also required if you wish to have DAT-MAIL automatically export data to the Tagger after a Mail.dat is imported.

If you do not have the Tagger connected to your network and don’t mail a large number of jobs, it is possible to use a USB flash drive to transfer files to and from the Barcode Tagger. The import of the sibling tray data would have to be manual, not automatic, however.

You can also setup the Tagger to write its log files to a network share to facilitate transfer of that data to DAT-MAIL while reading job data from USB flash drives. If mailers are producing many jobs at the same time, it may actually be easier for an operator to load the data from a flash drive than a network share but it is always better to send data back to DAT-MAIL via the share. The “search” function does allow a mailer with many files in their share to quickly locate the one they need, so a share will always will be the most efficient way to exchange data between the Tagger and DAT-MAIL.

There are two ways DAT-MAIL can provide data to a Tagger:

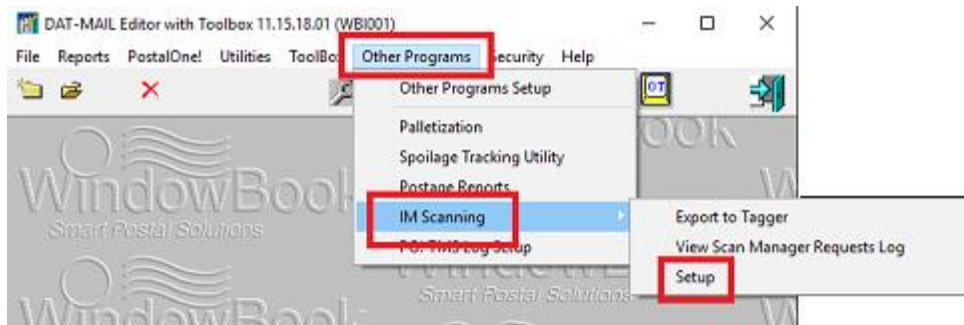
1. Automatically after each job is imported into DAT-MAIL. This is good for mailers that are using a share. If you are importing Mail.dat files with DAT-MAIL’s Daemon or AWAM™, the export is done after all other automated processes are finished. This way if you are palletizing during import, the Tagger exports will reflect the pallets that were added; and
2. Manually using the “Export to Tagger” button on the *Advanced Navigator* screen or the “IM Scanning” option on the “Other Program” menu. Manual export is best when one of the following is true:
 - The mailer has multiple Taggers and wishes to direct a file to a specific Tagger for tag printing that is in-line with production. The files can be saved to a sub-folder in the share that has been designated for use by a specific Tagger; or
 - The mailer wishes to save job data to USB flash drives.

Once DAT-MAIL has transferred the data to a share or USB flash drive, the Barcode Tagger can read the file, print or reprint tray tags and create “sibling” tags. If sibling tags are created, a new barcode number is generated and recorded in a log file that is saved to a “logs” sub-folder in the share or USB flash drive. DAT-MAIL can import the log data and update these tags to the appropriate mail.dat files. DAT-

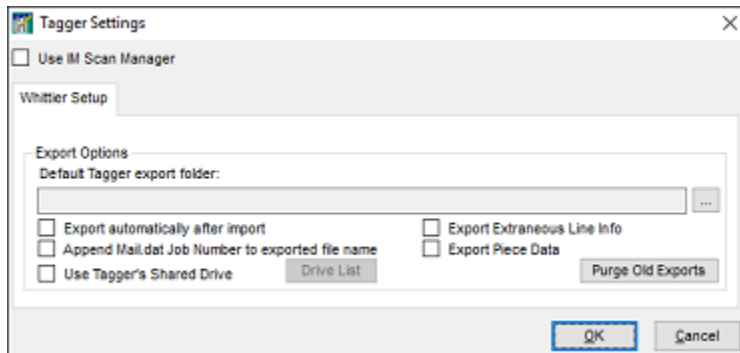
MAIL can import the log data and update these tags to the appropriate Mail.dat files through the use of the Automation Scheduler with IM Scan Manager plug-in.

DAT-MAIL SETUP TO TRANSFER DATA

Setting up DAT-MAIL to transfer data to the Tagger occurs within DAT-MAIL's *Tagger Settings* screen. To access the *Tagger Settings* screen, close all other program functions in DAT-MAIL and then from the top-line menu bar, select "Other Programs", then select "IM Scanning", and then "Setup".

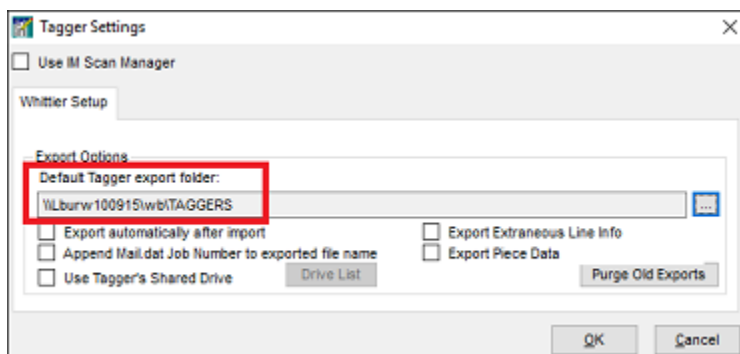


The *Tagger Settings* screen will display.



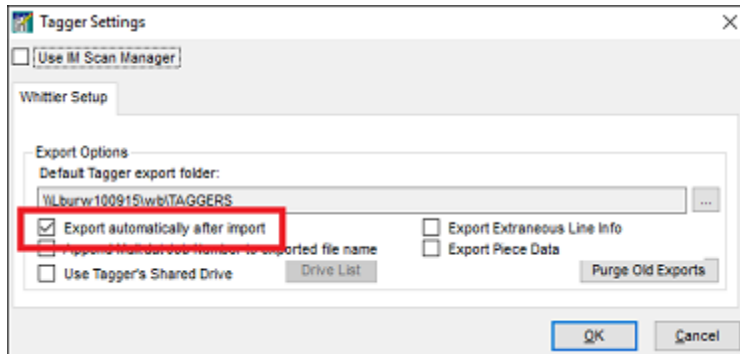
Export Options

DEFAULT TAGGER EXPORT FOLDER



You can set the default export folder to the UNC folder name used by the network share that the Tagger will be connected to by clicking the field's corresponding browse... button. If you are transferring the data to the Tagger using a USB flash drive, insert it then select it as the export folder. You will need to reinsert a USB flash drive before you export files.

EXPORT AUTOMATICALLY AFTER IMPORT

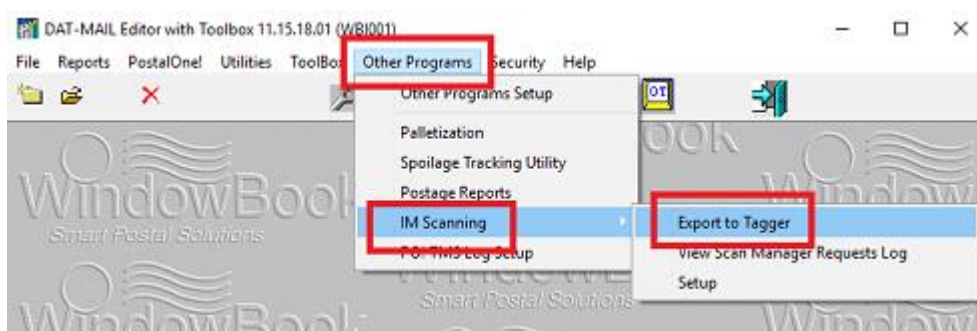


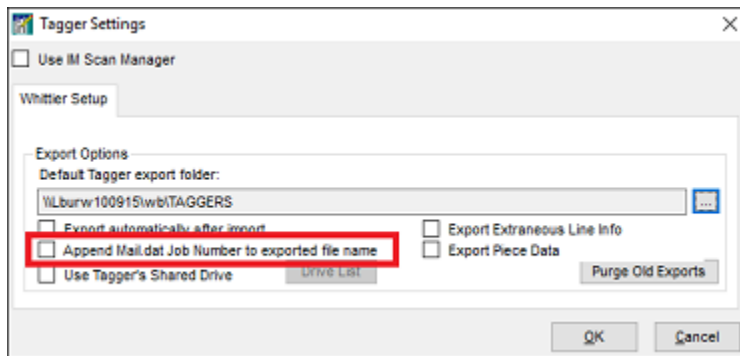
This feature sends data to the Tagger share automatically after a Mail.dat file is imported. To use this feature you must be exporting data to the Tagger via a share.

There are certain situations where you should not check this option:

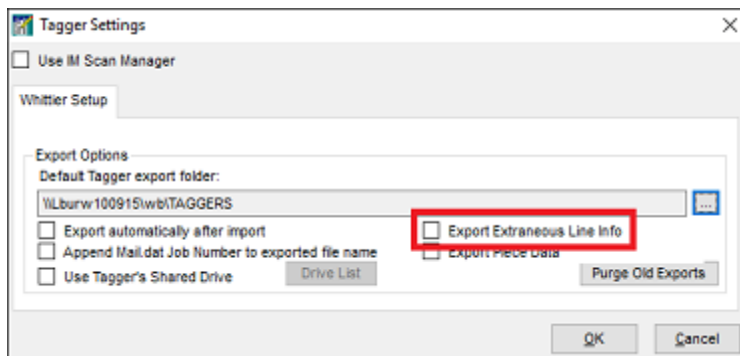
1. If you change your entry points on drop shipped mailings and print the entry point designation on the extraneous line of your tray tags;
2. If you have multiple Taggers and wish to send data to a specific Tagger. When you export the files manually, you can pick which Tagger to send the data to; and/or
3. If you export your data to USB flash drive.

In the three cases above it is better to export data to the Tagger from either the DAT-MAIL *Advanced Navigator* screen or by selecting the "Export to Tagger" menu found via "Other Programs">"IM Scanning".



APPEND MAIL.DAT JOB NUMBER OT THE EXPORTED FILE NAME

When you export a file for use by the Tagger, the file name is going to be the same name used in the Mail.dat file that was imported by DAT-MAIL. Window Book strongly recommends that this file name include the Job Number associated with this file. It will make retrieval from the share much easier using the search feature. If you cannot rely on this file name to include the job number, you should enable this feature which will add the job number to the end of the file name all the time. This way you can always find this file by job number.

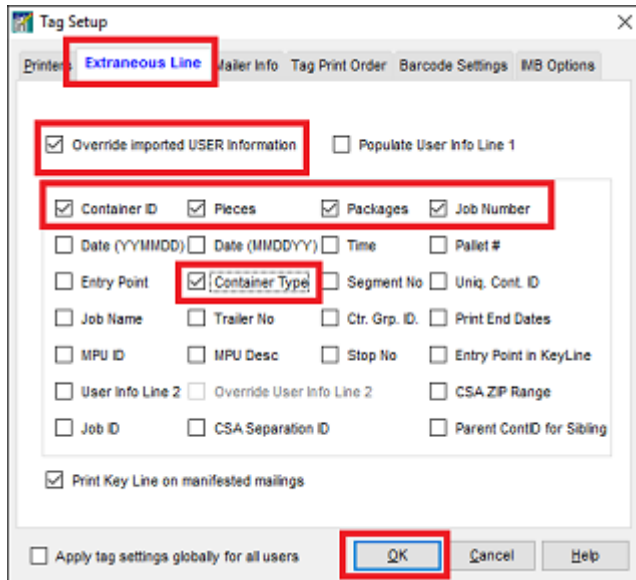
EXPORT EXTRANEIOUS LINE INFORMATION

DAT-MAIL has the ability to format the extraneous line of the tray tag to include data you may want to use in production. This data will appear on tray tags that DAT-MAIL prints. If you enable this feature, it will alter the extraneous data sent to the Tagger so it will print the same information. There are two limitations though: 1) The extraneous line can be no more than 40 characters (a mail.dat limitation) and you cannot change the font used to print the extraneous line; and 2) The Tagger does not print the "User 2" field in mail.dat so those settings will not have any affect. Though this information is provided to the Tagger it is not updated back to the original mail.dat file.

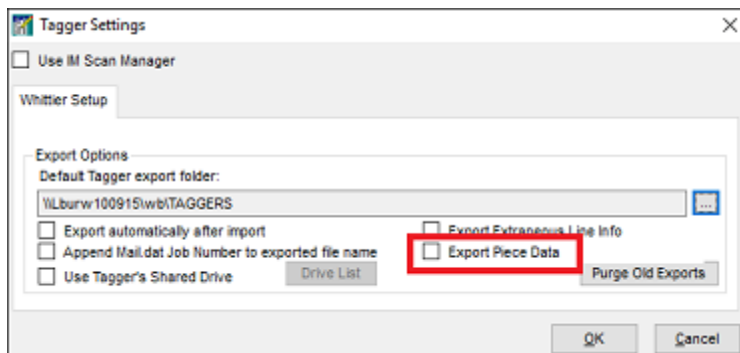
If you are already using this feature to configure the extraneous line printed by DAT-MAIL, you do not need to do anything else. Your current settings will be used. If you are **not** using this feature for tags printed by DAT-MAIL but would like to use it for tags printed by the Tagger, follow these instructions:

1. Go to the "Utilities" Menu on DAT-MAIL's top-line menu;
2. Select "Tray, Sack and Pallet Tag Printing";
3. Select "Tag Setup";

- Click on the “Extraneous Line” tab; and
- Check the items you want to print on the extraneous line (but be careful not to select too many due to the 40-character limit).



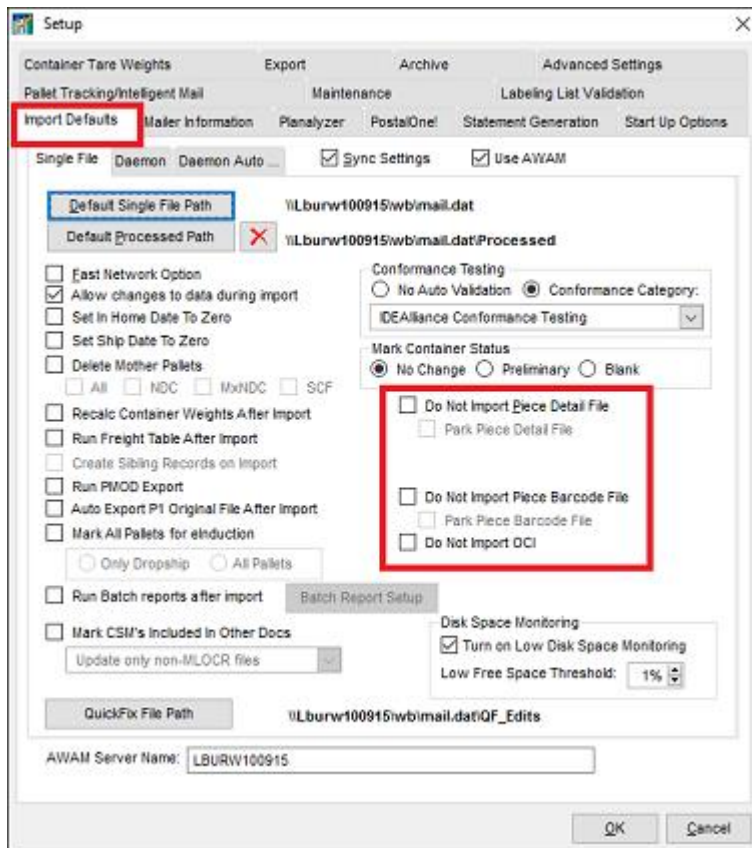
EXPORT PIECE DATA



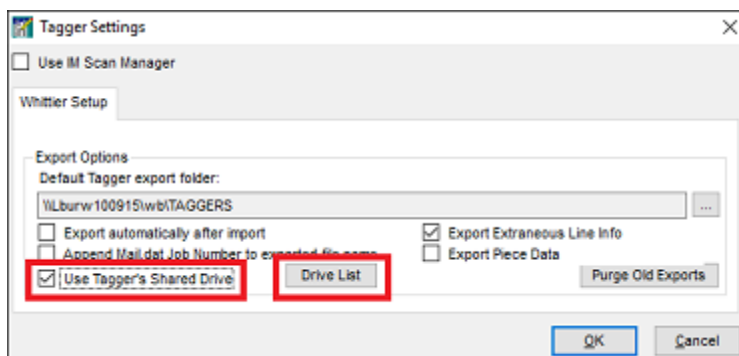
If you have a 2D USB scanner, you can reprint missing or damaged tray tags in Full Service jobs by just scanning a mail piece from the tray. To locate a tray based on an IMb scan, the Tagger must have single piece data. Checking this option will provide that data but you must be creating either PBC or PDR single piece files in your Mail.dat files.

Reference Guide

DAT-MAIL must also not be “parking” these files. To check, click the ‘File’ menu option on DAT-MAIL’s main screen, select ‘Program Settings’ and then ‘Program Setup’. Make sure the “Do Not Import Piece Detail File” and “Do Not Import Piece Barcode File” options are UNCHECKED.




USE TAGGER'S SHARED DRIVE



When sharing data with the BT-850 over a network, you have a choice of storing this data on a shared drive on your network or the BT-850’s internal file share.

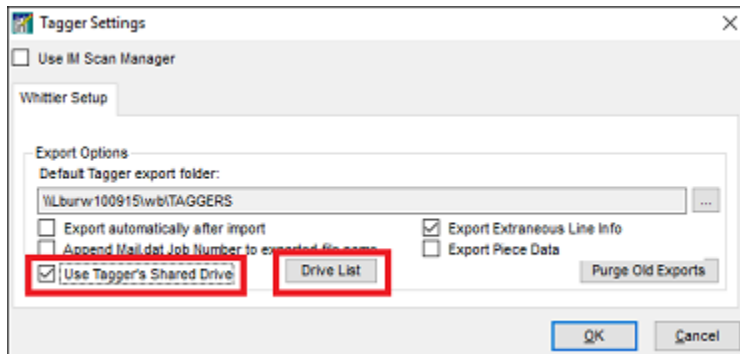
If you prefer to store the data on the BT-850’s internal file share, it does not matter if you have a single Tagger or multiple Taggers. When you select this option you would then press the adjacent **Drive List** button where you can indicate what the mapped drive or UNC path name is for each of the Taggers.

This is used for importing data. When DAT-MAIL imports data from the BT-850 it will look in all paths listed for the 'Logs' folders that hold the data being sent to DAT-MAIL.

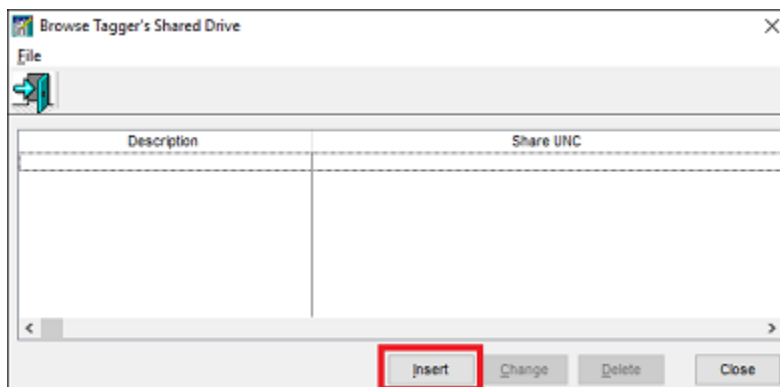
 ***This feature is only necessary if you use the shares located on each Tagger to exchange data with DAT-MAIL. If a network share is used to exchange data, this option does not require setup.***

To enable this feature, perform the following:

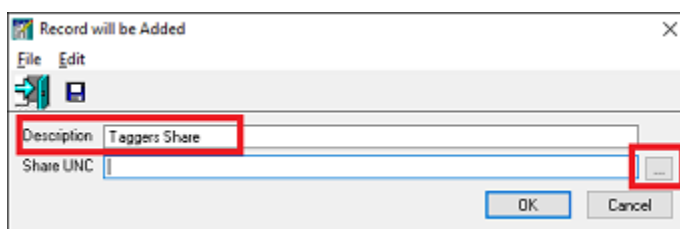
1. From the *Tagger Settings* screen, select the option to 'Use Tagger's Shared Drive';



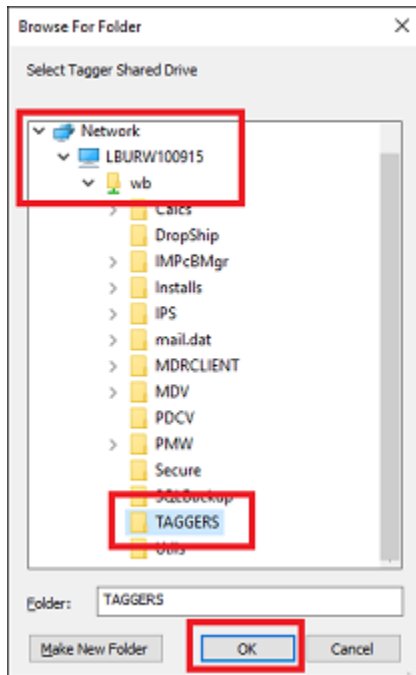
2. Click the **Drive List** button;
3. The *Browse Tagger's Shared Drive* screen will display. Click the Insert button to add a new Tagger;



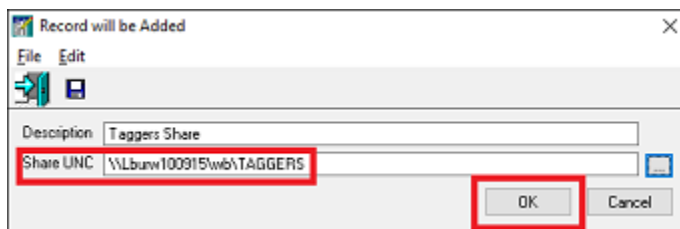
4. The *Record will be Added* screen will display. Type a description for the Tagger share and then type in or browse for the Share UNC path by clicking the browse button;



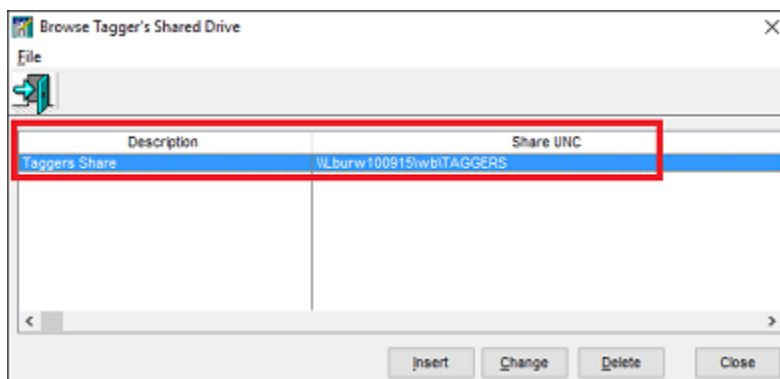
5. Locate the network share and select it. Click the **OK** button;



6. The added share and its UNC path will be displayed. Click the **OK** button; and



7. The Browse Tagger's Share Drive screen will display and will contain the newly added share.



Perform this procedure for as many Taggers as necessary. This particular example only uses one Tagger share.

Importing

Window Book does not support the manual importing of scan files (April 2016). Importing scan files is now accomplished through an automated process using the Automation Scheduler's IM Scan Manager plug-in.

The IM Scan Manager plug-in will update all Tagger log data into an MS-SQL database that will be updated to Mail.dat files when users generate statements for those jobs. The statement generation in DAT-MAIL is what creates "Ready-to-Pay" releases for PostalOne! and these submissions represent the "end state" of those trays that are part of the statement. PostalOne! allows no further changes once it receives the ready-to-pay update.

In addition, Mailers can configure the plug-in to send e-mail or text message notifications every time the plug-in either successfully or unsuccessfully performs an import of BT-850 data.



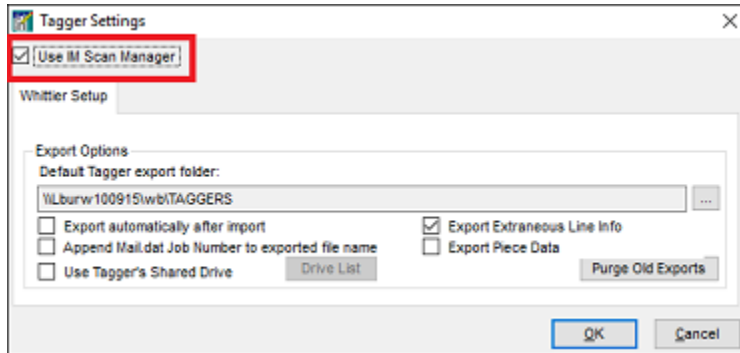
The Automation Scheduler does not tie up a workstation license which means you can do automated processing of Tagger logs even on a single user version of DAT-MAIL.

The setup of a default import folder for Tagger; as well as the archive folder for imported logs is done in the plug-in's *Scan File Import* screen.

Name	Input Folder
Tagger	\\Lburw100915\WB\IMScanManager\ScanFiles\TaggerLogs

Reference Guide

In order to use the IM Scan Manager for importing, select (check) the 'Use IM Scan Manager' option on the *Tagger Setup* screen in DAT-MAIL.



i *Setup instructions for the Automation Scheduler's IM Scan Manager plug-in; specifically, the 'Scan File Import' screen, are provided in the "Automation Scheduler System Guide", which is available on Window Book's web site at: <https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.*

SPLIT TRAYS

DAT-MAIL automatically splits trays into two so that DSMS and Tray Based copalletization programs can include those trays. Enabling and/or disabling this function is no longer an option (April 2016). It is automatically enabled and performed by the system.

TAGGER SETUP FOR TRANSFERRING DATA

When setting up the Tagger/DAT-MAIL interface, you need to first decide which of the four supported configurations you wish to use:

1. Use a network share to exchange data to the Tagger and back to DAT-MAIL. This configuration can support automated export and import (via the Automation Scheduler IM Scan Manager plug-in) and is the most straightforward. Tagger user will choose the mail.dat file from a list of files on the share prior to creating sibling tray tags and pallet labels or reprinting lost or damaged tray tags. Instructions for setting up a network share and connecting the Tagger to it appear in [Appendix 1](#);
2. Use the Tagger's local share to exchange data to the Tagger and back to DAT-MAIL. You will have to map the Tagger's share to every computer on your network using DAT-MAIL. This method may have advantages for some mailers who may have technical issues setting up the Tagger to access a network share. Instructions for connecting a PC to the Tagger's share appear in [Appendix 2](#). The IM Scan Manager Plug-in used to do imports. It allows you to create a list of Taggers if you have more than one so you can easily import data from multiple Tagger shares;

3. Use USB flash drives to hold data exported by DAT-MAIL for individual jobs but use the share for returning data to DAT-MAIL. The best way to use this is to delete all files on the USB drive prior to exporting a job file to it in DAT-MAIL. The USB drive stays with the job jacket and the operator would insert it prior to printing or reprinting. This will speed up loading the job since the operator does not have to choose from a number of possible drives on the network share. The data is returned to DAT-MAIL via the network share so automated import can be supported. This scenario is best for shops that are producing a number of different jobs at the same time; and
4. Use a USB flash drive to transfer data to and from the Tagger. Both data export to the Tagger and import from the tagger must be manual.

Once you have decided which configuration to use, you can configure the Tagger to do what is required.

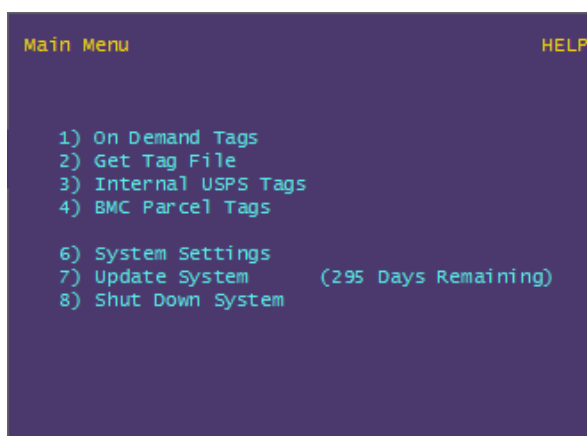
Defining the Share on the Network (Methods 1 and 3 Only)

If you create a share on your network, you need to tell the Tagger what and where it is. You can also indicate a sub-folder to read your Mail.dat files from. This is useful if you have multiple Taggers doing “in-line” production and tray tag printing by using different sub-folders to store files that will be produced by specific production lines. Each Tagger can be configured to read data from a different sub-folder of the share. The '\logs' sub-folder where data will be written to by the Tagger should be the same for all Taggers, however. Each log file name includes the Tagger serial number so there is never a danger of file contention.

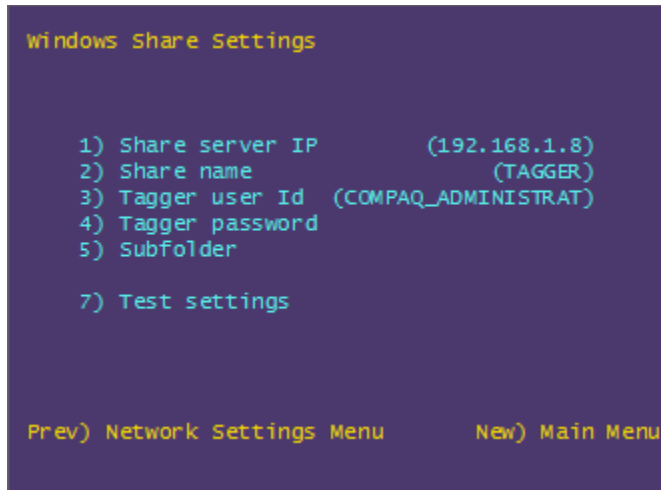
Example: The mailer has three Taggers and has setup a share on his network called TAGGERS. There are four sub-folders under TAGGERS: \Tagger1, \Tagger2, \Tagger3, and \Logs. The sub-folders Tagger1, 2, and 3 are for files that the mailer wants each of the Taggers to use. The '\Logs' folder is for the data that the Tagger is creating for DAT-MAIL.

All three Taggers will name the “TAGGERS” as the share. Tagger 1 will name the '\Tagger1' sub-folder for its input. Tagger 2 will name the '\Tagger2' sub-folder for its input, and '\Tagger3' will be the sub-folder name for the third Tagger’s (or Tagger 3’s) input.

1. From the Tagger’s *Main Menu* screen, select option “6” for System Settings. The *System Settings* screen will display;



2. From the Tagger's *System Settings* screen, select "5" for Network Settings. The *Network Settings* screen will display;
3. From the Tagger's *Network Settings* screen, select "2" for Window Share Settings. A *Windows Share Settings* screen will display.

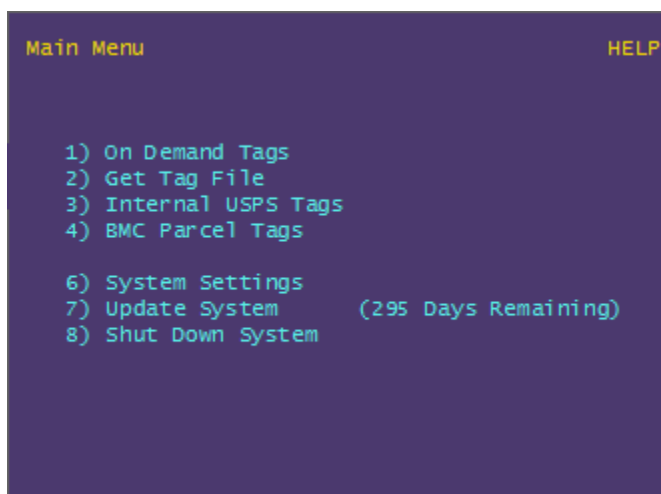


This is where you enter the IP address of the computer that has the share, and the login and password to get to the share. You also enter the share name and, if you are using sub-folders, the sub-folder name you are going to get your data from. The use of a sub-folder for retrieving Mail.dat files is optional.

FIRST TIME RETRIEVAL

When you retrieving Mail.dat files for the first time from the share, perform the following:

1. From the Tagger's *Main Menu* screen select "2" to Get Tag File;



2. The Tagger's Tag File screen will display. Select "2" for File Location; and



3. Select 'Share' as the source. The Tagger will retain that setting until you change it. If you wish to retrieve files from a USB flash drive, you can change the source to USB.

CONFIGURING TRAY TAG TYPE AND MAILER ID

The procedure for batch printing tags or printing in-line with production is documented in the Whittier's User guide. What is new is the ability to generate sibling tags. You must configure your Tagger to generate IMTL tray tags and also enter a Mailer ID (MID).



Window Book recommends you use a special MID just for this purpose. It needs to be an MID that is not otherwise used to generate Intelligent Mail Tray barcodes in any other program. This way the barcodes generated by the Tagger will not be duplicated by any other program. The USPS can provide extra 9 digit MID's upon request and no matter how many tray tags you print, there will be plenty of serial numbers available, even with a 9-digit MID to meet the USPS's 45-day uniqueness window. If you don't do this, it is unlikely that duplicate barcodes will be created since the entire barcode including the ZIP Code portion is part of the uniqueness key, but it is still possible.

Setting Log file Location (Methods 1 and 2 Only)

You can decide what device to write your log file to. It can be a network share, the local Tagger share or a USB flash drive. You will need to set this location before you create any sibling tags. To do this you must load a Mail.dat file.

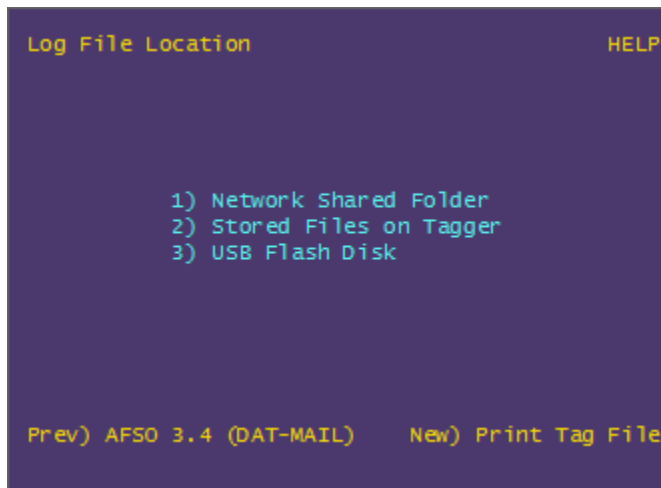
1. From the Tagger's *Mail.dat Functions* screen, select "7" for AFSO 3.4 (DAT-MAIL);



2. The *AFSO 3.4 (DAT-MAIL)* screen will display. Select "8" for Log File Location;



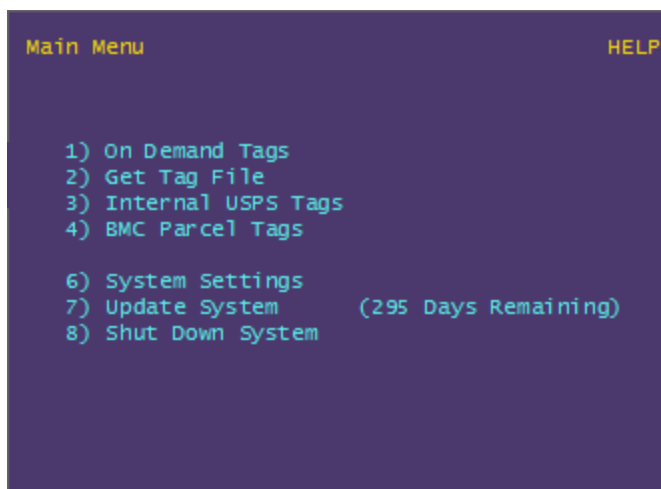
3. The *Log File Location* screen will display. Select the appropriate location's corresponding number (e.g. Network Shared Folder is number 1). Congratulations, your Tagger, Scanner and DAT-MAIL software are all set up to use!



Mailer ID Setup

To set up the Mailer ID, perform the following:

1. From the Tagger's Main Menu screen, select "1" for On Demand Tags;



2. From the next screen, select "3" for Mailer Info;
3. From the next screen, select "1" for Mailer ID; and
4. From the next screen, enter the 6 or 9 digit (usually 9 digit) MID you want to associate with the Tagger.

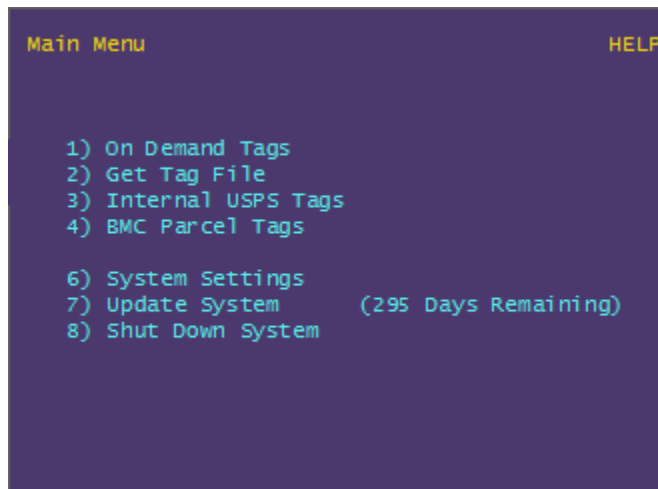


If you don't use a unique Mailer ID for each Tagger, there is a small chance that some of your tags will contain barcodes that were generated by other systems within the past 45 days. The chances of this happening actually diminish with time. The USPS uses the entire Intelligent Mail Tray or Container barcode when looking at uniqueness. So even if the same MID/serial number combination is used, the chances that the two trays are going to the same Zip Code or the two pallets are mailed under the same job number is small.

Setting Up the Print Logging

When this feature is enabled, the Tagger will log all tray tags you are printing, whether it be printing "in-line" with production or by printing tags by scanning a pallet placard. DAT-MAIL will automatically mark these trays as "ready to pay" for PostalOne!. When you go to generate statements in DAT-MAIL, all trays that have had their tray tags printed will be marked for payment. This gives you the ability of automatically managing your partial mailings. To enable this:

- Go to the Tagger's *Main Menu* screen and select "6" for System Settings; and



- You can then toggle the print logging feature to enable or disable it by pressing the "2" key. (This menu is also where you would register a new Tagger with Whittier).

USING THE DAT-MAIL/TAGGER INTERFACE

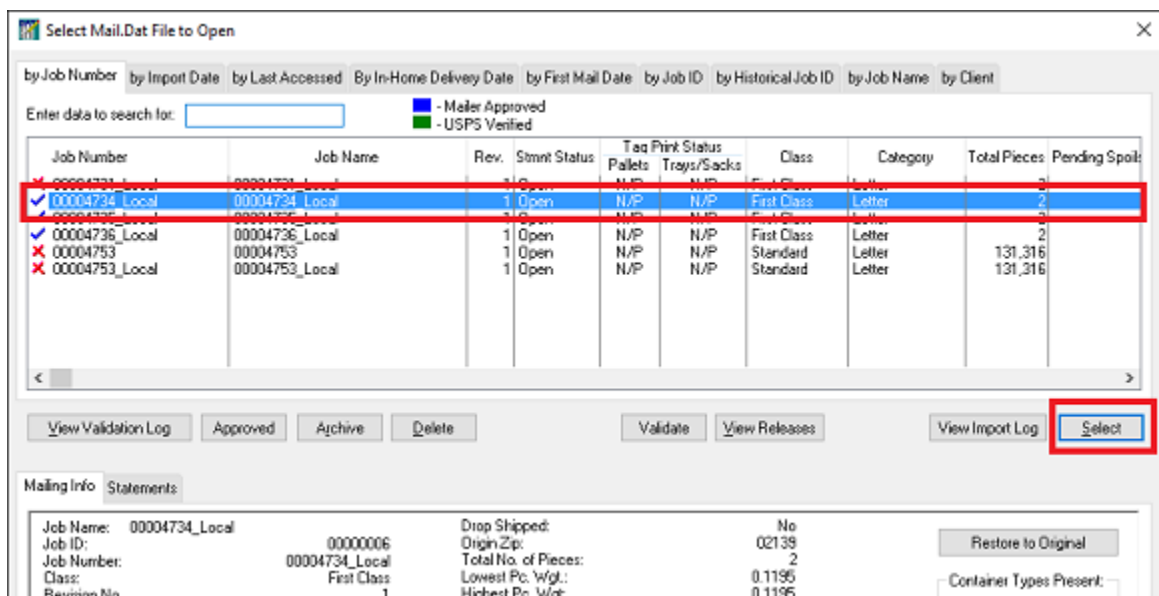
Exporting to the Barcode Tagger

If you did not elect to automatically export your files, you can do so manually by using DAT-MAIL's *Advanced Navigator* screen. To manually export a Mail.dat file, perform the following:

1. From DAT-MAIL's main screen, click the open file icon;



2. A *Select Mail.Dat File to Open* screen will display. Select the file to export and click the **Select** button;



3. DAT-MAIL's *Advanced Navigator* screen will display. Click the **Export to Tagger** button;

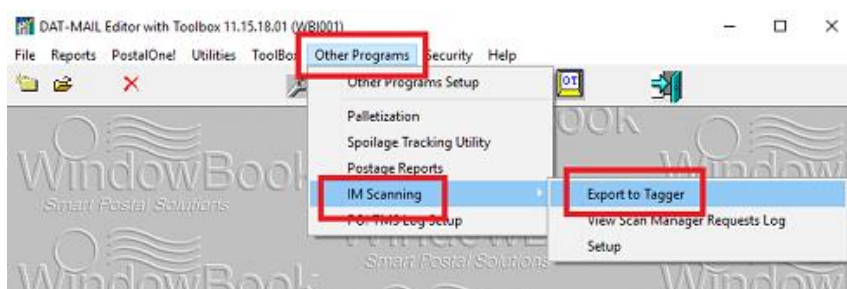
The screenshot shows the 'Advanced Navigator' window with various fields and buttons. The 'Export To Tagger' button is located on the right side, below the 'Scan IMTL Codes' button and above the 'Analyzer' button. It is highlighted with a red rectangle.

4. An *Export to Tagger Setup* screen will display. Select the desired Tagger share to be used from the drop down list provided. If only one Tagger share exists, the drop down list (refer to the blue highlighted field in the image below, i.e. "Tagger2"), this field will not be displayed and only the 'Export Path' and 'Export File Name' fields will be available. Click the **OK** button when finished. The selected file will be exported to the export path/folder specified.

The 'Export to Tagger Setup' dialog box is shown. It has three main fields: a dropdown menu for 'Tagger' (currently showing 'Tagger2'), an 'Export Path' field (containing '\\Lburw100915\\wb\\TAGGERS\\Tagger2'), and an 'Export File Name' field (containing 'X14A17E6'). There are 'OK' and 'Cancel' buttons at the bottom.



The same export can be performed from the 'IM Scanning' options in DAT-MAIL under 'Other Programs'.



Importing Data from the Barcode Tagger

Whenever you print a sibling tray tag from a Mail.dat file with the Tagger, the barcode for the new tray is recorded along with the barcode from the tray that overflowed is saved to a log file. This file is uniquely named based on the Tagger's serial number and placed in the "Logs" folder of the network share or USB flash drive. The log files can hold data from multiple mail.dat files so they are imported into DAT-MAIL as multi-job files.

MANUAL IMPORT

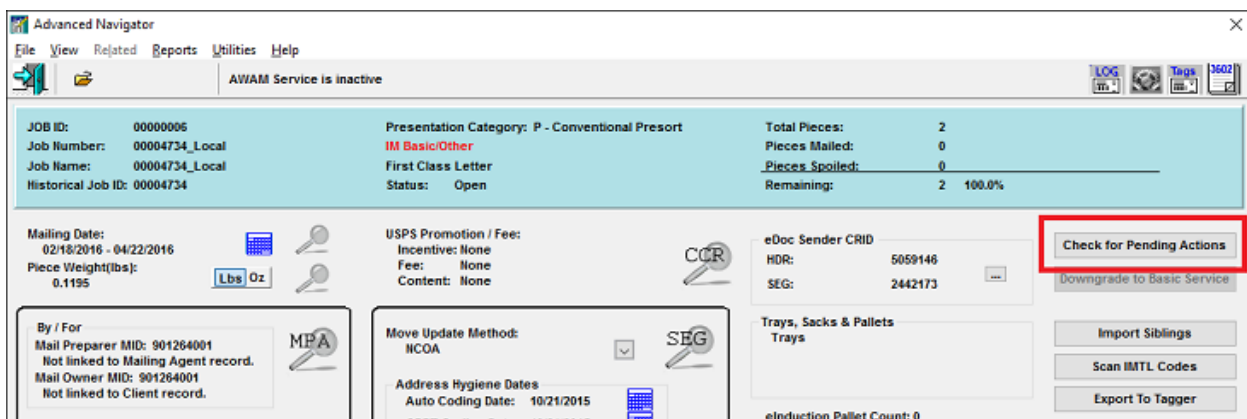
As of April 2016, Window Book no longer supports manual importing. All importing is now performed using the Automation Scheduler's IM Scan Manager plug-in.



Do not attempt to import the multi-job file generated by the Tagger with the "Import Siblings" button in the Advanced Navigator. This is for a single-job file of IMTB's which is not currently supported by the Tagger. Since the current file can contain tags generated from multiple jobs, it needs to be exported from a part of the program that has access to all of DAT-MAIL's Mail.dat files.

AUTOMATED IMPORT WITH THE AUTOMATION SCHEDULER IM SCAN PLUG-IN

Using the IM Scan plug-in, the BT-850 log files are updated into the Mail.dat files unless the job is open by a user. When this happens, the log entries are stored in a database and when the postage statements are generated with the BT-850, all changes will be added to the Mail.dat files at that time. To determine if there are any pending BT-850 entries that haven't been updated before generating statements, go to the *Advanced Navigator* screen and click the **Check for Pending Actions** button.



If there are pending entries, you will have the option to update them from there.

Setting Up a 2D Scanner to Use the Interface

If you are using a 2D handheld USB scanner for the first time, you will need to set it up so it can scan a USPS Intelligent Mail Barcode and also to add a carriage return, line feed at the end of each scan. To do this with a scanner supplied by Whittier Mailing Products or Window Book, please go to Appendix 4 for further instructions.

Using the Tagger to Generate Sibling Tags

What is a Sibling Tray, Sack or Pallet?

When the piece attributes used to define a presort are not exactly right, the mailer's presort program may indicate that more pieces of mail will fit into a tray than is actually the case. Since many presorts are run in advance of the production of the mail piece, these piece attributes are estimated and may not be correct. Rather than re-run the pre-sort to correct this problem, it is sometimes easier to put the pieces that won't fit into an "overflow tray". This is permitted by the DMM but Full Service mailers need to label the tray with a unique Intelligent Mail Tray barcode (IMTb) and add it to their Mail.dat files. The IDEAlliance, the organization that maintains the Mail.dat specification, calls the trays that are added to correct a tray count "siblings". Even if a mailer is not mailing under Full Service, adding sibling trays allows mailers to correct the tray counts on PostalOne! postage statements and reports which will otherwise be incorrect because of the extra overflow tray.

The same condition can happen when printing pallet placards and pallet labels. If your Tagger is equipped to print pallet labels or placards as well as tray tags, you can also use this solution to create sibling pallet labels.

When a sibling tray, sack or pallet is added to Mail.dat, the USPS does not have to know which pieces went onto the sibling tray, sack or pallet. What sibling records tell the USPS is that the contents of the original sack, tray or pallet are now split up into multiple containers. The sum of the pieces of all siblings along with the actual contents of the physical tray, sack or pallet will be equal to the pieces that were in the original tray, sack or pallet.

For example, if a tray was supposed to hold 200 pieces but only 180 actually fit, an over flow tray with 20 pieces was created. The total of the two actual trays is still 200 pieces which was originally what was supposed to fit in the original tray. The contents are now split up across multiple trays, in this case two trays.

MAIL ACCEPTANCE

Today, PostalOne! does not show siblings on its statements due to a defect (ETR-49516) that may be corrected sometime in 2013. Though there is a way to indicate which trays may have siblings associated with them, this indicator is not reliable due to PostalOne! limitations described in Appendix 3. DAT-MAIL does not attempt to use that indicator due to its unreliability. If you are using PostalOne! eDocs we recommend that you:

- Do not make any submission to PostalOne! until you need to pay postage on part of your mailing; and
- Read Appendix 3 about PostalOne! limitations.

You can submit a Mail.dat file with siblings for postage payment, but the verification clerk may want to see an accounting of the extra trays that were created. DAT-MAIL's Tray/Sacks on Pallet Report (under Production Reports) shows all of the siblings you have added to assist with verification. Other DAT-MAIL reports will also include these siblings including its postage statements, a variety of other production reports and the "parent trays" that have siblings. The Enhanced Qualification report also shows all siblings that have been added.

In a future release of DAT-MAIL and the Tagger software, there will be a new option to create additional “regular” trays instead of siblings. This new “tray splitting” feature will work much like the Sibling feature but the result will be regular trays with real weights and piece counts. You will scan the original tray that overflowed then scan the first mail piece in the new tray with a 2D scanner. The pieces starting with that piece will all be transferred to the new tray. Your piece IMb’s will have to be unique (though the mailing itself does not have to be Full Service for this feature to work). Another advantage of using the upcoming Tray Splitting feature is that the job can be copalletized by third party consolidators such as Fairrington or RR Donnelly. Currently they are prohibited from copalletizing sibling trays.

The Difference between Splitting Trays and Splitting Pallets

When inaccurate mail piece thickness is provided to a presort program, the number of pieces that should fit in the trays defined may not fit after all. In some cases, mailers may have to rerun the presort but this is not always possible or practical. When more trays are needed, it is possible to use the Whittier Barcode Tagger to create the extra trays and have DAT-MAIL update the Mail.dat files so these trays are documented to maintain Full Service Intelligent Mail compliance. The Tagger / DAT-MAIL software and interface can actually do this in two different ways: 1) Creating “sibling” trays and pallets; and 2) “Splitting” trays. This section describes how each works and at the advantages and disadvantages of each approach. How each is treated by PostalOne! is different and this is covered in more detail Appendix 3.

SIBLINGS

A sibling container is associated with an original container but does not define the content of the original tray. Essentially you are telling the USPS that the contents of the original tray or pallet is now spread out across multiple trays or pallets but the sum of these will add up to the content defined of the original tray or pallet. The purpose of a sibling is to pass additional barcode information up to Full Service and to change the tray and pallet counts of postage statements generated by PostalOne! (which needs to be fixed at the present time). Creating a sibling with the Tagger/DAT-MAIL interface is very easy: Just scan the original tray or pallet and out comes the additional tray tag or pallet label and the data will get updated to your Mail.dat file. Limitation: Third party consolidators that offer tray copalletization services cannot accept jobs that include siblings for copalletization.

- **Advantages:** Easy - No special production process is needed, a 1D barcode scanner can be used and you can add siblings to the second or subsequent part of a partial mailing (see Appendix 3)
- **Disadvantages:** You may need to print supplemental documentation on jobs which contain sibling containers to help with verification. PostalOne! postage statements will not include sibling trays and pallets until ETR is corrected. Cannot be used with third party copalletization services or with most DSMS consolidators.

TRAY SPLITTING

The process of splitting a tray is very much like creating a sibling but the difference is that the contents of the original tray will be revised and the content of the new tray will be defined. This way PostalOne! and other supply chain recipients of this data such as logistics companies will see these new trays as ordinary trays. When mail is verified, the new tags will still show that they are siblings since it would be difficult to update extraneous line information on the new tag and you would also have to replace the

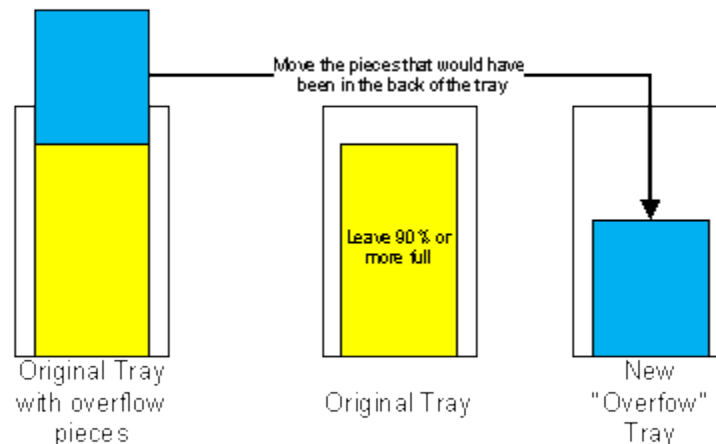
Reference Guide

original tray tag you scanned with an updated tag. Once the mail has been verified, the fact that contents of both original and new tray records in Mail.dat are accurate allows these trays to be copalletized by third parties.

- **Advantages:** You can use third party palletization services and DSMS consolidators. New trays will appear on the USPS qualification report, and they will appear on PostalOne! Postage Statements even before the ETR is corrected so in most cases no supplemental documentation will be needed.
- **Disadvantages:** Requires a 2D imager which costs about \$100 more than a handheld laser scanner. New trays must be produced in a specific way (see image below), and Mailers that produce a job over a period of days and mail over a period of days may need to split these Mail.dat files in order to get all new trays to be split vs. being processed as siblings (see Appendix 3).

When you produce trays that will be split, it is very important that the pieces you move to the new tray would ordinarily be the last pieces that would fit in the original tray. It is important that the pieces that follow the first piece in the new tray would have followed that piece had all the pieces fit in the original tray.

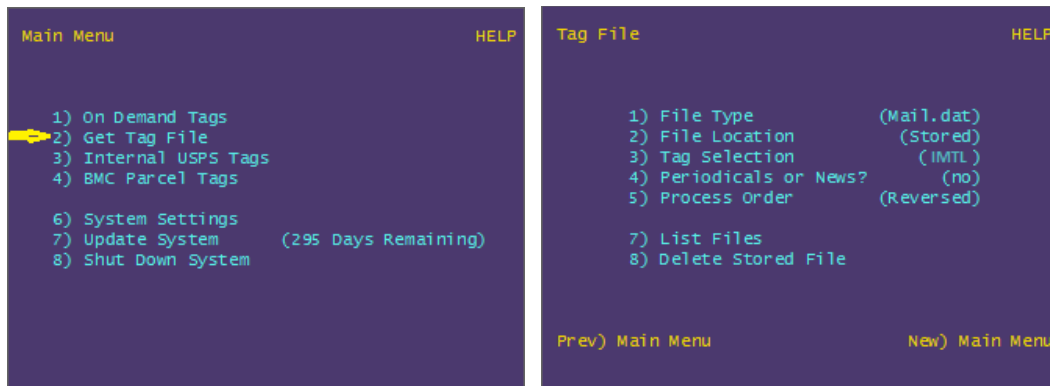
Note: DO NOT MOVE THE PIECES THAT ARE IN THE FRONT OF THE ORIGINAL TRAY TO THE NEW TRAY WHEN DOING TRAY SPLITTING!



Creating Sibling Trays and Pallet Tags with the Tagger

Before you can print sibling tags or pallet labels, split trays, or re-print lost or damaged tray tags, you must load the Mail.dat file for the job you are producing. To do this, perform the following:

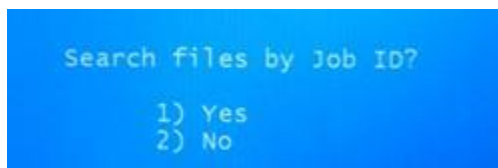
1. From the Tagger's *Main Menu* screen, press "2" for Get Tag File. The *Tag File* screen will display;



2. From the *Tag File* screen, press "7" to List Files;

NOTE: Be sure the file type is "Mail.dat" and the Tag Selection is "IMTL". For those doing "in-line" printing of your tray tags; if your jobs are produced in reverse order and this is not reflected in your Mail.dat file, you can change the order of tag printing to "Reverse" by pressing the "5" key.

3. Next, you will be asked if you would like to search files by Job ID. Select "1" for Yes;



This Job ID is not necessarily the Job ID in your Mail.dat files. It is actually a numeric portion of the job number that should have been put in the file name when the Mail.dat file was originally generated by the presort program or when you manually exported the Mail.dat file to the Tagger. For example, if your job number was 123456, putting 123456 in the Mail.dat file name will make this file very easy to retrieve if you answer "Y" to this question. If you use a network or the Tagger's share to transfer data to the tagger, this search feature will make it easy to list only jobs that contain the job number entered (plus folders in the share). This way you can see only one or a few files listed out of hundreds or thousands on the share!

4. You will now see a list of available Mail.dat files and folders. If the file list is full, you can advance to the next page to look at more files, then press the key that corresponds to the file you wish to load. You can also select a folder and see which files are located in that folder. When you have selected a specific file, the Tagger's *Print Tag File* screen will display;

```
Print Tag File                                HELP
Tag (1 of 94) in PROD_PCO100_GXEB6A_maildat_T_001

7)Print this tag          9)Print entire file
4)Print Pallet            6)Print range of tags

    DES MOINES IA                    503
    FCM LTR BC 3D SCHEME B
    Des Moines IA 50318-9998
    1 Pcs: 2 Pkg: 1 Job: TEST JOB 101 0

1)Previous tag            3)Next tag
0)Back 10 tags            -)Forward 10 tags
2)Mail.dat functions

Prev) Tag File Menu      New) Main Menu
```

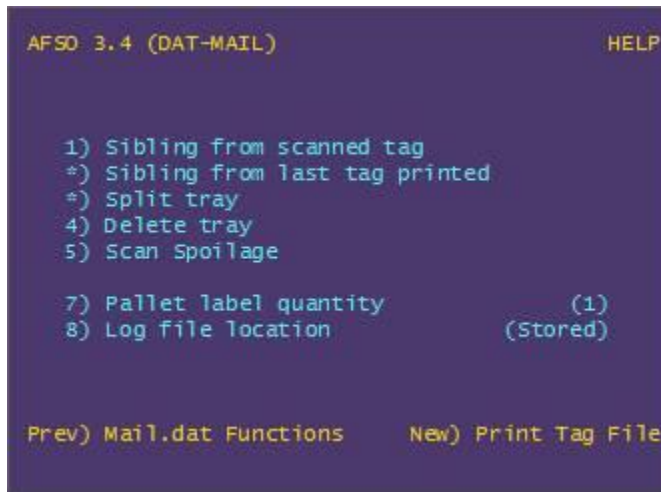
5. Press "2" to bring up the *Mail.dat Functions* screen. From here, you can perform some useful functions like batch printing your tray tags by container grouping or pallet number, or even printing all of the tray tags for a pallet by scanning the pallet placard. This feature provides the labor and time savings of using the one-up Tagger tray tags without being impacted by the slower printing speed of the thermal printer compared to batch printing all of your tags with a laser printer on 10/sheet stock. That time savings will more than offset any cost differences of the stock;

```
Mail.dat Functions                            HELP

1) Print by Container Grouping
2) Print by Pallet Display Container
3) Print Trays from Pallet Scan
4) Print Pallets from Tray Scan
5) Search Display Container ID
6) Print Pallet and all Trays from IMb
7) AFSO 3.4 (DAT-MAIL)

Prev) Print Tag File Menu    New) Print Tag File
```


6. Select option "7"; the *AFSO 3.4 (DAT-MAIL)* screen will display;



From this screen you can perform functions that are specific to DAT-MAIL users. This includes creating "sibling" tray tags and pallet labels, splitting trays and re-printing lost or damaged tray tags by scanning a mail piece in the tray.

You may notice that some menu options are disabled and display an asterisk (*) instead of a number. That is because some other action must be taken before that option can be used. For example, you cannot create a sibling for the last tray you printed a tag for unless you just printed a tray tag! In the case of the menu displayed, you cannot set pallet label quantity because the record being displayed when you went to the Mail.dat and DAT-MAIL Functions menus was a tray, not a pallet. If it was a pallet you can specify how many copies of the pallet label you wish to print (if you are using the Tagger to print pallet labels).

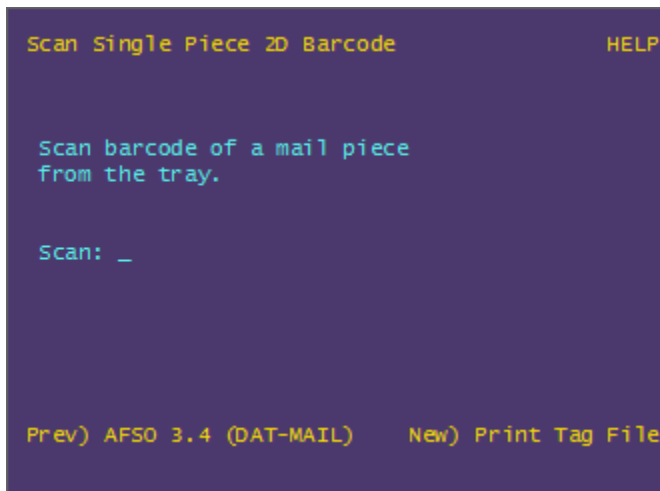
PRINTING TAGS

To print sibling tags, perform the following:

1. From the *AFSO 3.4 (DAT-MAIL)* screen select "1" for Sibling from Scanned Tag in order to scan the tray that has 'overflowed' which the new sibling tray tag will be associated with;



The Scan Single Piece to 2D Barcode screen will display, which prompts you to scan the tray tag:



2. Aim your scanner/imager at the tray tag and pull the trigger. The 24-digit Intelligent Tray Barcode will appear on the screen briefly and a new tag will be printed; and

Note: We do not recommend the use of triggerless scanners since they can decode tray tags at times that the Tagger is not on the scan barcode screen. This would be the same as pressing 24 keys on the Tagger when in other menus resulting in unpredictable actions like reprinting tags for the entire job.

3. Place the new tag in the sleeve of the new overflow tray.

If you are printing tags one at a time in-line with production and you can see that the mail that is supposed to go into a specific tray will not fit, you can use the 2nd option listed on the *AFSO 3.4 (DAT-MAIL)* screen, specifically "Sibling from last tag printed". No scanner is needed in that case:

- When using in-line tag printing, select "7" (Print This Tag) to print each tag while in the Tagger's *Print Tag File* screen;

```
Print Tag File                                HELP
Tag (1 of 94) in PROD_PCO100_GXEB6A_maildat_T_001

7)Print this tag          9)Print entire file
4)Print Pallet           6)Print range of tags

    DES MOINES IA                    503
    FCM LTR BC 3D SCHEME B
    Des Moines IA 50318-9998
    1 Pcs: 2 Pkg: 1 Job: TEST JOB 101 0

1)Previous tag          3)Next tag
0)Back 10 tags         -)Forward 10 tags
2)Mail.dat functions

Prev) Tag File Menu      New) Main Menu
```

- To print the sibling, from the *Print Tag File* screen select "2" for Mail.dat Functions;
- From the Tagger's *Mail.dat Functions* screen, select "7" for AFSO 3.4 (DAT-MAIL); and

```
Mail.dat Functions                            HELP

1) Print by Container Grouping
2) Print by Pallet Display Container
3) Print Trays from Pallet Scan
4) Print Pallets from Tray Scan
5) Search Display Container ID
6) Print Pallet and all Trays from IMb
7) AFSO 3.4 (DAT-MAIL)

Prev) Print Tag File Menu    New) Print Tag File
```

- From the Tagger's *AFSO 3.4 (DAT-MAIL)* screen, select "2" for Siblings From Last Tag Printed.

```

AFSO 3.4 (DAT-MAIL)                                HELP

1) Sibling from scanned tag
2) Sibling from last tag printed
3) Split tray
4) Reprint tray tag from IMb scan
5) Select Tray from IMB scan
6) Delete tray
7) Scan Spoilage

*) Pallet label quantity                            (1)

NEXT) -- scroll list

Prev) Mail.dat Functions      New) Print Tag File

```

SPLITTING A TRAY

This process is nearly identical to printing sibling tags. To split a tray, perform the following:

- To retrieve the mail.dat file for the job you are working on, select "2" from the *Main Menu* screen to display the *Get Tag File* screen, then select "7" to display the *List Files* screen and select the job;
- From the *Print File* screen, select "2" to display the *Mail.dat Functions* screen

```

Print Tag File                                HELP
Tag (1 of 94) in PROD_PCO100_GXEB6A_maildat_T_001

7)Print this tag          9)Print entire file
4)Print Pallet            6)Print range of tags

    DES MOINES IA                503
    FCM LTR BC 3D SCHEME B
    Des Moines IA 50318-9998
    1 Pcs: 2 Pkg: 1 Job: TEST JOB 101 0

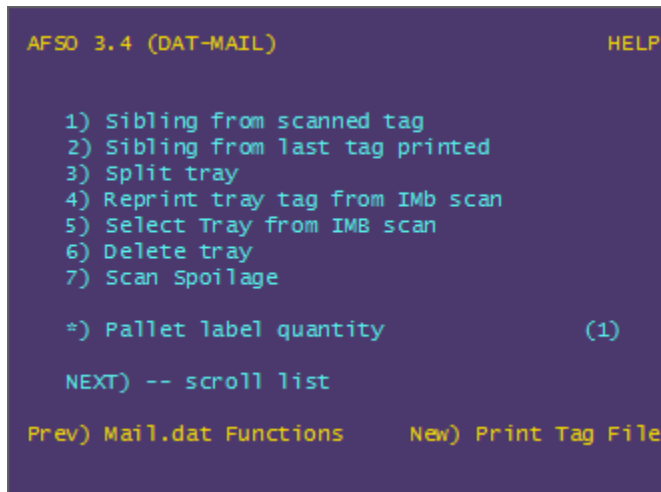
1)Previous tag            3)Next tag
0)Back 10 tags            -)Forward 10 tags
2)Mail.dat functions

Prev) Tag File Menu      New) Main Menu

```

- From the Tagger's *Mail.dat Functions* screen, select "7" for *AFSO 3.4 (DAT-MAIL)*;

4. From the Tagger's AFSD 3.4 (DAT-MAIL) screen, select "3" for Split Tray;



5. Scan the tray tag of the tray that you are splitting; and
6. Move the pieces that would have been in the back of the original tray to the new tray, then pull out the first piece of mail in the new tray and scan it with your 2D barcode imager. The new tray tag will print and you should immediately put it into the sleeve of the new tray.

Reprinting Tray Tags by Scanning a Piece Barcode

If you have a 2D USB scanner like the Honeywell 1900 and can generate piece data for the Tagger (see setup instructions), you can reprint missing or damaged tray tags by just scanning the mail piece.

Go to the Tagger's *AFSD 3.4 (DAT-MAIL)* screen and select option 4 for "Reprint tray tag from IMb scan". You can scan any piece of mail in the tray and the replacement tag will be printed. No guessing! This feature has other uses as well. For instance: if pieces fall out of a tray, you can figure out which tray they belong in by using this feature and discarding the tags that are printed.

This feature only works on jobs that have been assigned unique piece barcodes - though the individual pieces do not need to qualify for the Full Service discount. They can be non-auto pieces and still allow the program to reprint the correct tray tag! Full Service jobs will always meet this requirement but many non-Full Service jobs may also meet it if the mail pieces have unique barcodes and the Mail.dat files created include single piece data.

Selecting a Tray from an IMb Scan

If you are doing "in-line" tray tag printing as trays are produced, one challenge you may have is figuring out where the production run is starting in the Mail.dat file when a job is split up across multiple production line. You can easily find the first tray in the production run by simply choosing option 5 "Select Tray from IMb Scan" from the Tagger's *AFSD 3.4 (DAT-MAIL)* screen and use your handheld imager/scanner to scan the IMb on the first mail piece produced. It will take you to the Tagger's *Print Tag File* screen with that tray displayed. Just press the 7 key to print the tray tag and advanced to the

next tray! You can also use this feature to locate the tray for any piece of mail without having to print a tray tag.

Deleting Trays

Mailers can remove a tray from a mailing using the “DELETE TRAY” function in the Tagger. This may be helpful if a tray is not mailed because of shortages or is pulled or withdrawn from the mailing for other reasons. Once a tray is deleted from a mailing it can not be “un-deleted” so extreme caution should be used if this function is used. Trays must be deleted prior to a ready-to-pay update being exported or the tray will not be deleted.

When DAT-MAIL sees that the Tagger has deleted a tray, it will remove that tray from any exports sent to PostalOne! if none had been created. If an original file was uploaded to PostalOne!, DAT-MAIL will create a special update to delete these trays when the mailer creates a ready-to-pay update, but mailers must be careful to upload the deletion submission prior to the ready-to-pay submission. The deletion submission will have a lower submission serial number in its file name. User’s of Window Book’s eDocs Manager will not have to worry about this since it will automatically upload these updates in the correct sequence and wait for the first submission to finish processing before submitting the second update.

Scanning Sibling Tags Created by the Tagger’s “On Demand” Mode

This method requires no interface between the Tagger and DAT-MAIL. The mailer connects a USB scanner to the computer that runs DAT-MAIL and scans sibling tags previously generated by Tagger’s On-Demand mode. This approach has some drawbacks:

- The computer needs to be near where the sibling tags are printed and placed into trays in order to conveniently scan them; and
- The user must manually enter the tray level and destination ZIP into the Tagger. Sometimes more information like Carrier Route is needed. Manual data entry can lead to errors. Neither of the other methods of creating siblings requires data entry.

The user can scan these tags into the job that is opened by pressing the “Scan Siblings” button on DAT-MAIL’s Navigator screen, then scanning the sibling tags. If the user gets an error, it means that either they did not create the tag with a tray level and destination ZIP Code present in the job, or they either entered the info incorrectly into the Tagger or are scanning the tags into the wrong job.

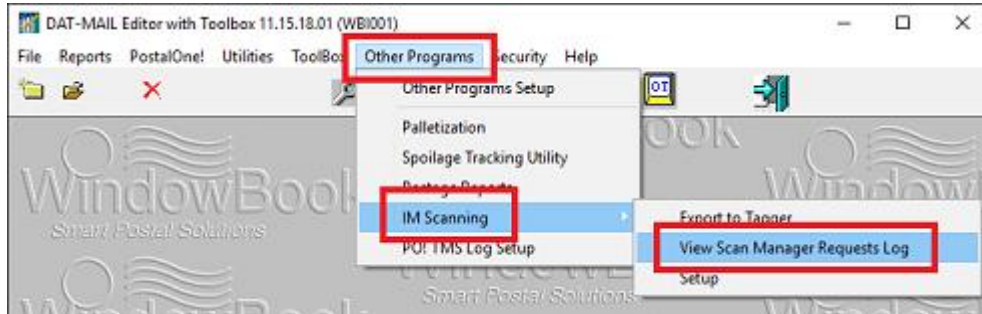
FILE MAINTENANCE

It is important to remove old Tagger files from a network share or the internal Tagger file share so that those folders do not become too cluttered with files you will not use again. Also, the log files created by the Tagger and imported into DAT-MAIL should also be purged occasionally.

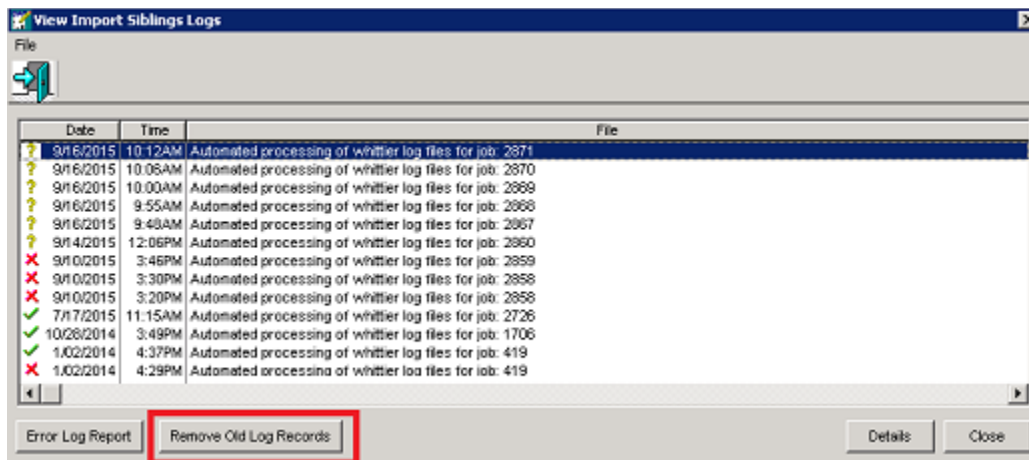
Window Book has made both functions very easy.

Remove Old Log Records

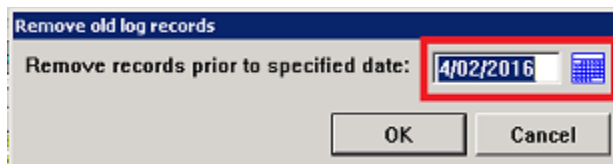
To remove or purge the log files, from DAT-MAIL'S main screen, select 'Other Programs' > 'IM Scanning' > 'View Scan Manager Requests Log'.



The *View Import Siblings Logs* screen will display. Click the **Remove Old Log Records** button.



A *Remove old log records* screen will display. Enter the cut-off date in the field provided, or select it by clicking the calendar icon that is adjacent to the date field.

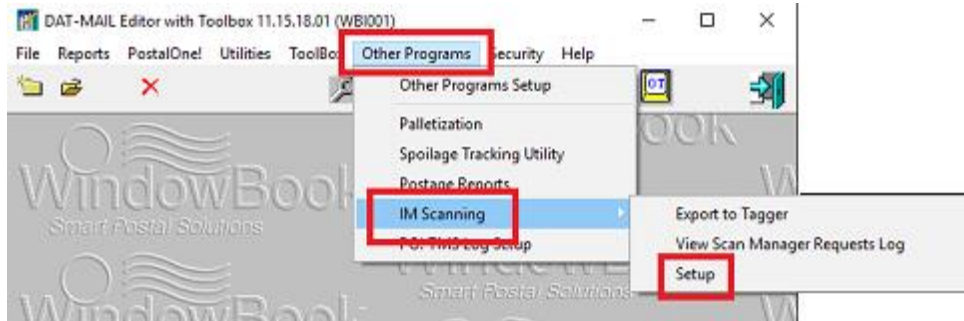


Log records older than the date entered/selected will be deleted or purged when the **OK** button is clicked (clicking the **Cancel** button will abort the delete or purge process). The date used will reference the date the file was imported into DAT-MAIL, not the date of mailing.

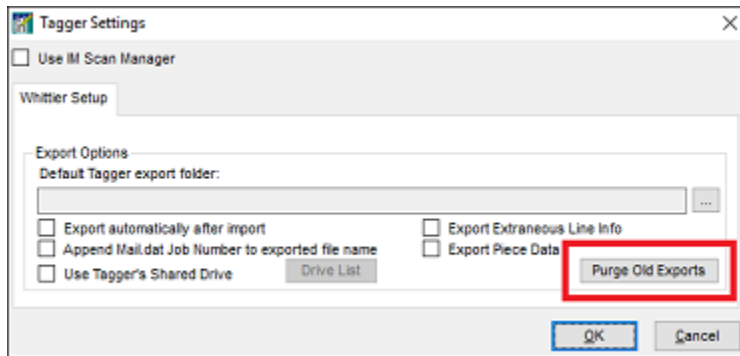
 ***Be aware that once records or items are purged, they cannot be restored.***

Remove Old Tagger Files

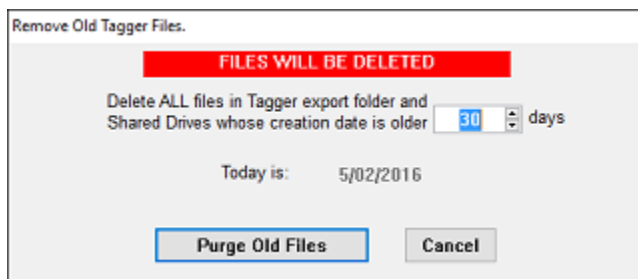
To remove or purge exported Tagger files, from DAT-MAIL'S main screen, select 'Other Programs' > 'IM Scanning' > 'Setup'.



The *Tagger Settings* screen will display. Click the **Purge Old Exports** button.



The *Remove Old Tagger Files* screen will display, prompting the Client to enter the number of days the files to be purged or deleted must be older than.



Click the **Cancel** button to cancel the purging process or click the **Purge Old Files** button to complete the purging process. If you accidentally purge one that is needed, you can usually just manually export it again.

If multiple Tagger shares have been defined in the program setup, the Mail.dat files in all these Tagger shares will be removed if they are more than the specified number of days old. For this to work properly, the time/date settings on each of the Tagger's must be in synch with that of the mailer's network.

APPENDIX 1

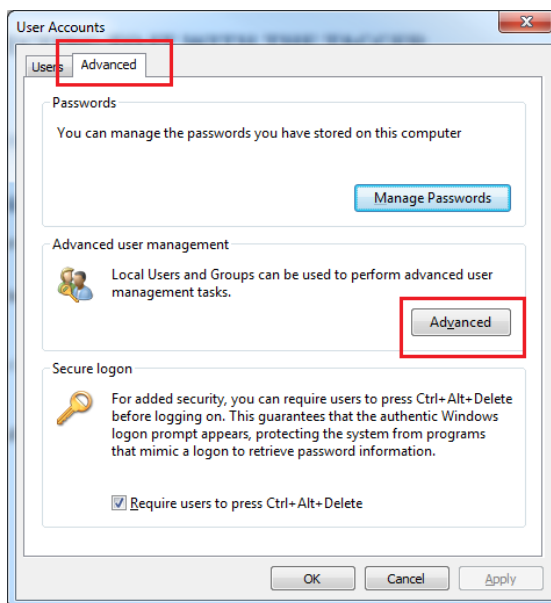
SET UP A NETWORK SHARE & CONNECT TO IT WITH THE TAGGER

i *The following set up instructions were performed on a PC/Server with a Windows 7 operating system (OS). Screen layouts and menu options may vary if the set up is being performed on a PC/server that has an OS other than Windows 7. Please refer to your local IT administrator with any questions.*

Create a User Account on the Local PC/Server

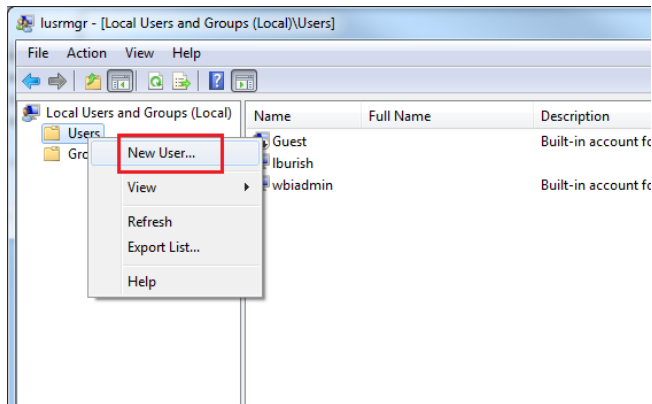
(For simplicity, an account called 'user' with a password of 'pw1234!' is created/used.)

1. Open the Advanced User Management window on the local PC/server (Start -> Control Panel -> User Accounts (on Windows 7 click "Manage User Accounts") -> Advanced tab -> Advanced;

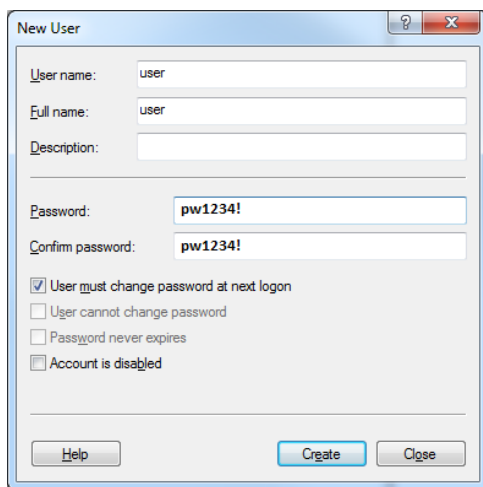


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2. The *Local Users and Groups* window will display. To create the user account, right click on "User" and select "New User";



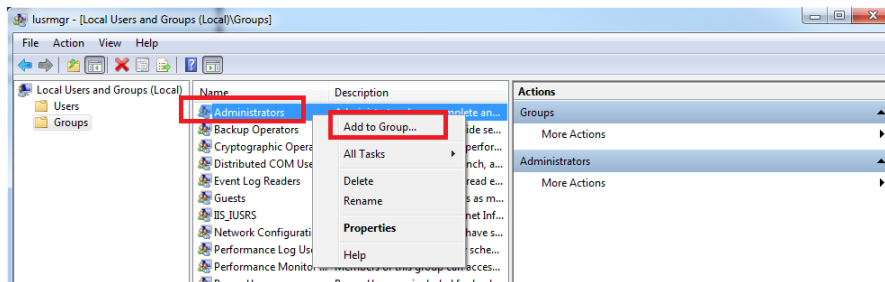
3. Enter the User info, for example: 'User name:' = **user**; and 'Full name:' = **user**;
4. Create the password for the account (example: **pw1234!**);



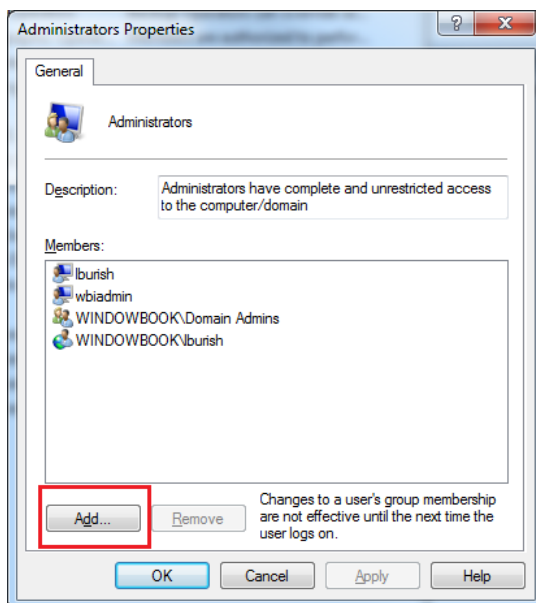
5. Click the **Create** button; and
6. Click the **Close** button.

Add 'User' to the Local Machine Administrator Group

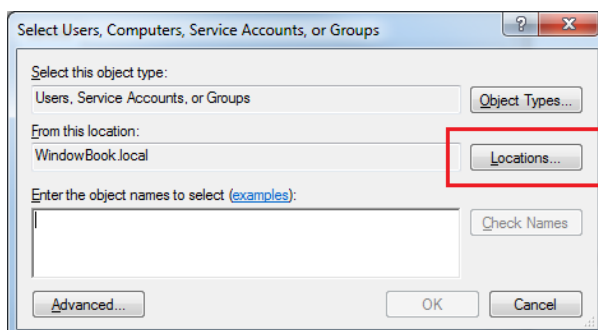
1. In the *Local Users and Groups* window, double click on "Groups";
2. Locate the "Administrators" group and right click on it. Select "Add To Group..."



3. The *Administrators Properties* window will display. Click the **Add...** button;

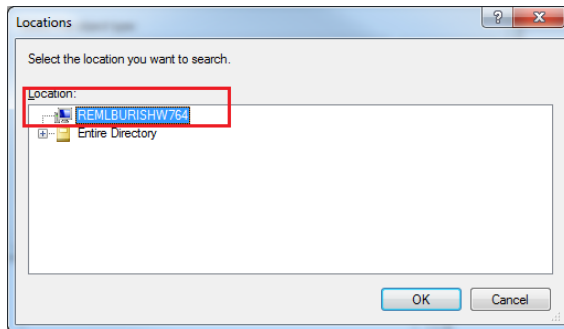


4. The *Select Users, Computers, Service Accounts, or Groups* window will display. Click the **Locations** button;

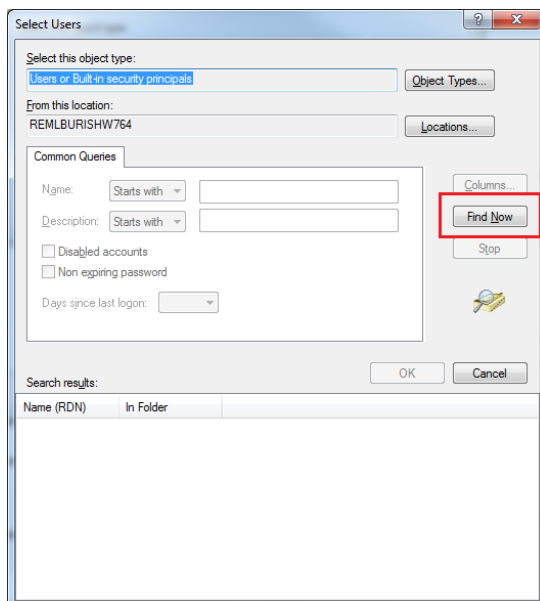


Appendix 1

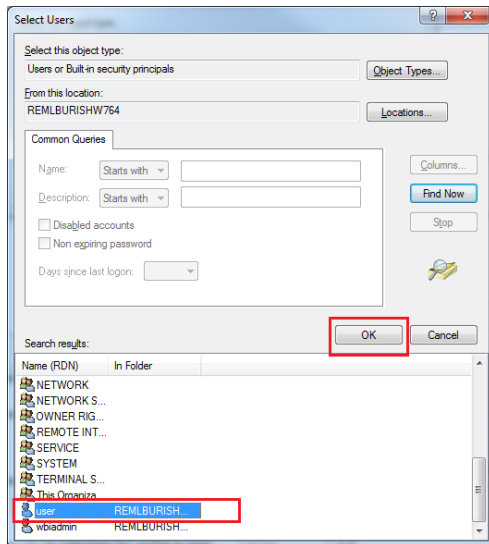
5. The *Locations* window will display. Locate the computer's name the **users** account was created on in the list and single-click on it to highlight it. Click the **OK** button;



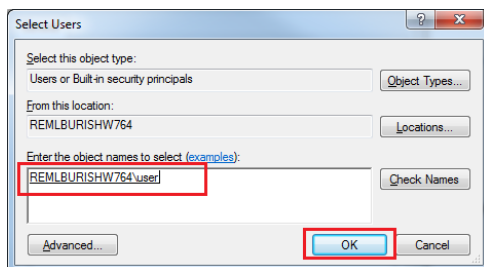
6. You will be returned to the *Select Users, Computers, Service Accounts, or Groups* window (see number 4 above). Click the **Advanced** button;
7. The *Select Users* window will display. Click the **Find Now...** button;



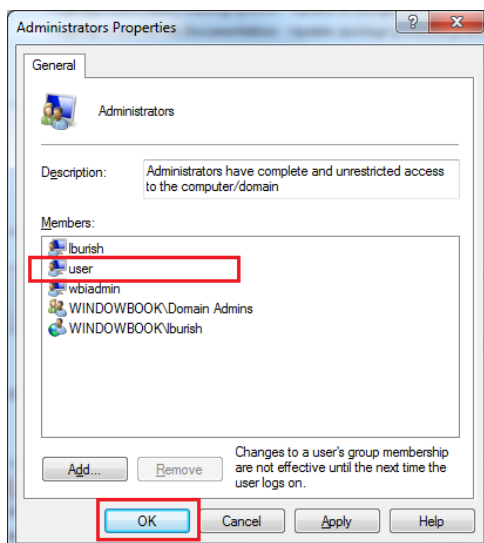
8. The 'Search results:' portion of the screen will populate with existing users. Find the **user** account created above and single-click on it to highlight it. Click the **OK** button;



9. You will be returned to the *Select Users* window. Note the newly created **user** account is displayed. Click the **OK** button;



10. You will be returned to the *Administrators Properties* window. Note the newly created **user** account is listed in the Members field. Click the **OK** button; and restart the computer.



Create a Folder on the PC/Server and Share It to the New User Account

For illustration purposes in this Appendix, a new folder called “Test” is created and used.

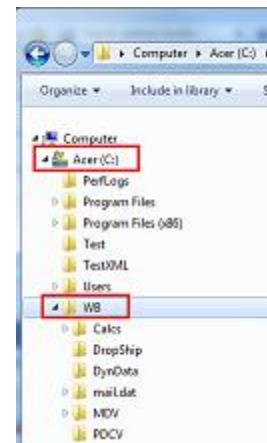


When creating your own folder, the name of the folder should not be test, but should be something that correlates to what you are doing, e.g. “Tagger1”.

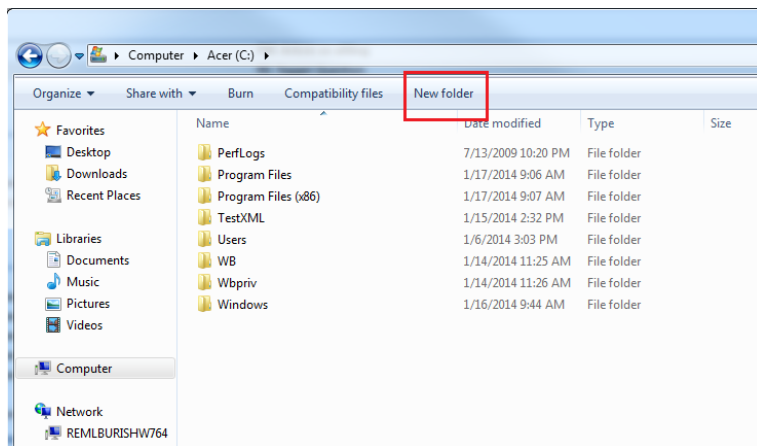
1. On the local PC/server, click ‘Start’ and select ‘Computer’;
2. In the Computer window, locate and select the drive that DAT-MAIL is installed on (in this example, that drive is ‘c:\');



The DAT-MAIL installation will always be identified as a folder named ‘WB’.



3. Click on the **New Folder** button or right click anywhere in the white area of the window and selecting: New -> Folder. The new folder should be created in the root of the drive, not the ‘WB’ folder;

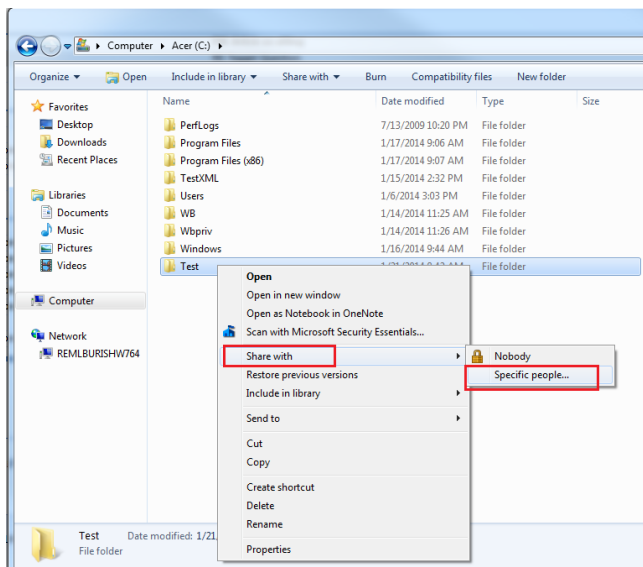


- For this example, name the new folder 'Test';

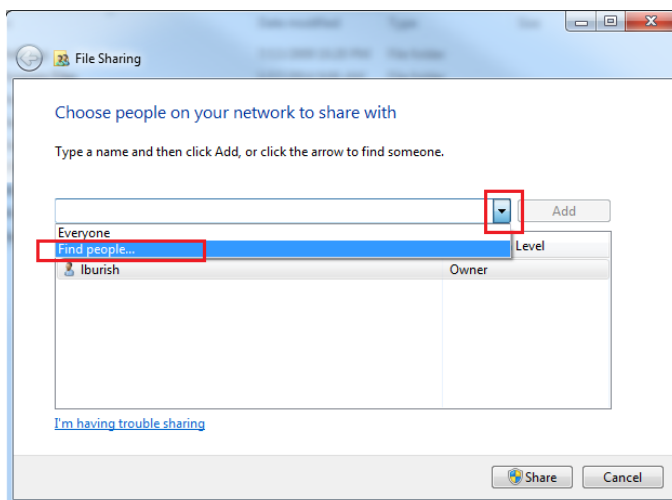


When creating your own folder, the name of the folder should not be test, but should be something that correlates to what you are doing, e.g. "Tagger1".

- Right click on the new folder (**Test**) and select "Share with..." -> "Specific people...";

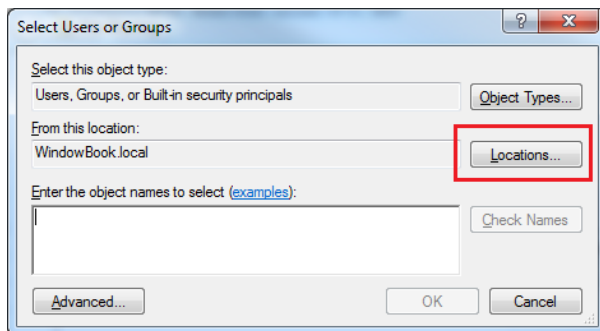


- A File Sharing window will display. Click the drop-down arrow and select "Find people...";

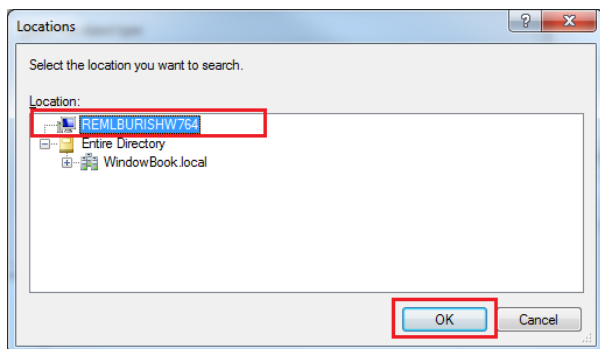


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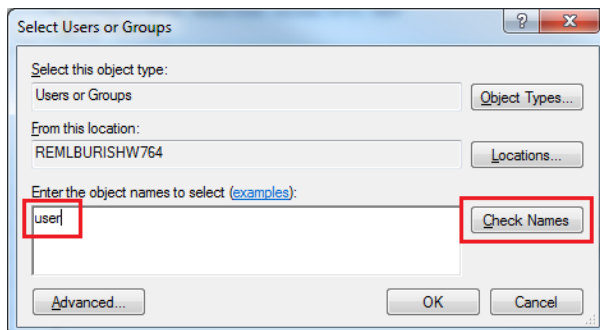
7. A *Select Users or Groups* window will display. Click the **Locations** button;



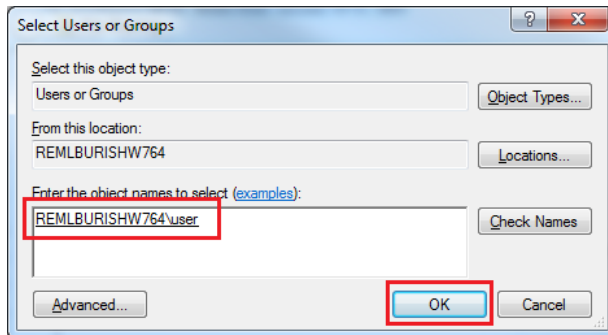
8. A *Locations* window will display. Select or highlight the local machine name and click the **OK** button;



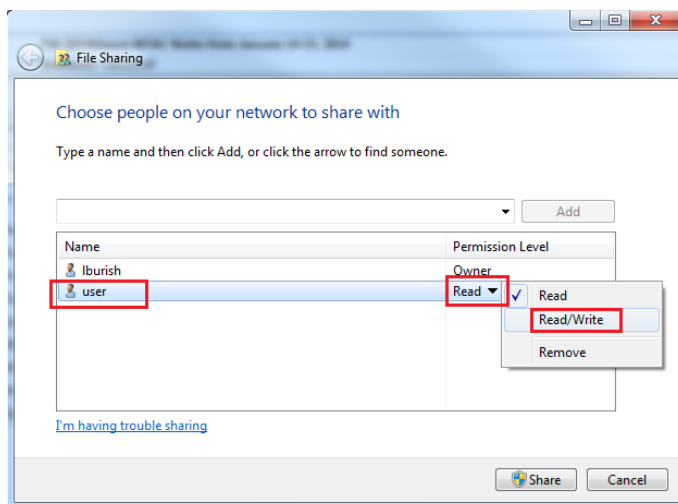
9. You will be returned to the *Select Users or Groups* window. Type in the user name ("user") and click the **Check Names** button;



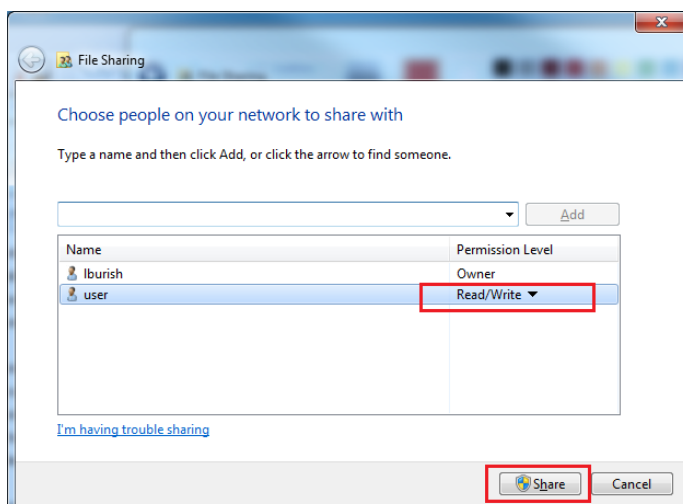
10. When the computer locates the user account on the local computer it will display it as: *LocalComputerName\user* or in this example: *REMLBURISHW764\user*. Click the **OK** button;



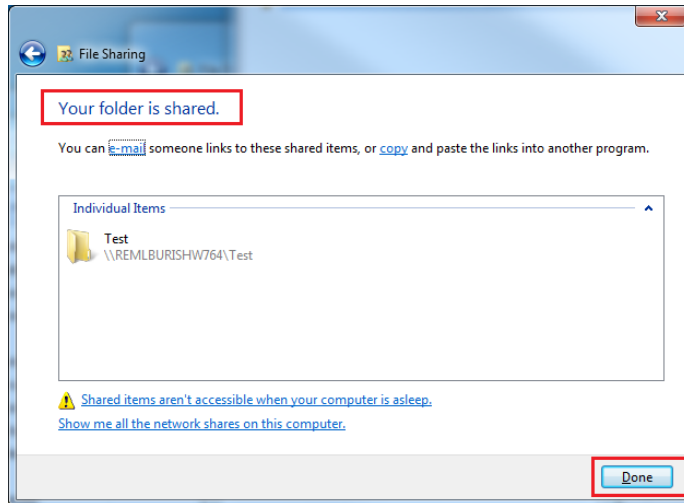
11. You will be returned to the File Sharing window. The user account will be listed with a Permission Level of "Read". Click the drop-down next to "Read" and change the Permission Level to "Read/Write";



12. Click the **Share** button. You will be returned to the *File Sharing* window which will confirm that your folder (i.e. **Test**) has been shared; and



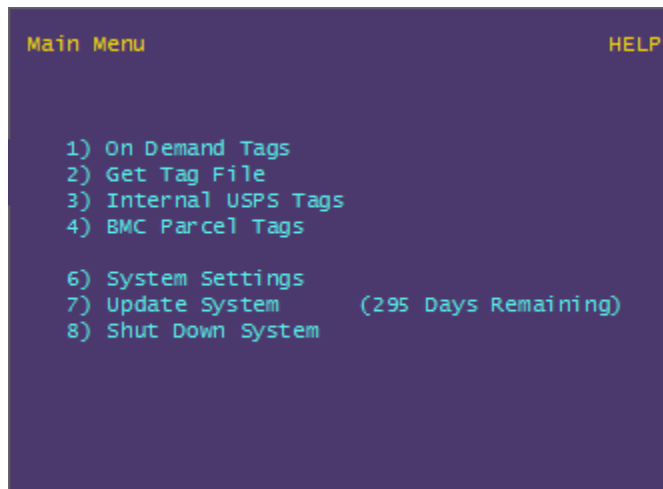
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13. Click the **Done** button.

Set Up the Network Configuration on the Tagger

Network configuration of the Tagger is performed from the Tagger's *Main Menu* screen:



1. To begin, select "6" for System Settings;
2. From the Tagger's *System Setting* screen, select "5" for Network Settings;
3. From the Tagger's *Network Setting* screen, select "5" for TCP/IP Settings;
4. Select "1" for Connect and select Wired option;
5. Select "2" for Source. Depending if your network has a DHCP server or not, pick the appropriate choice for either DHCP or STATIC IP (this example uses STATIC IP);

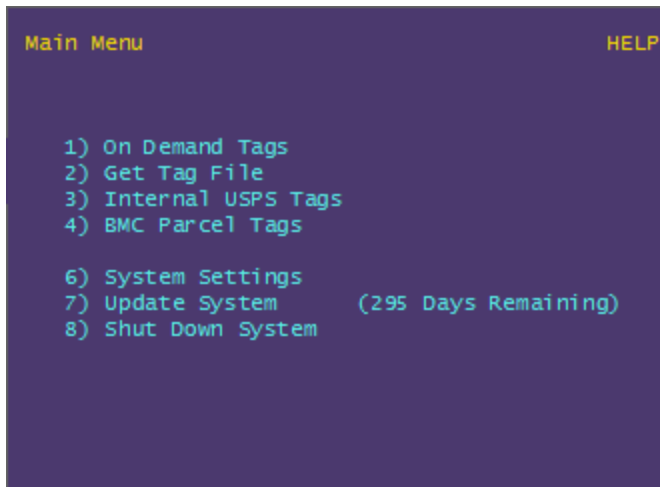
6. Select "3" to enter Tagger IP (our example will use a STATIC IP OF 192.168.1.10 for the Tagger). Make sure that the PC/server is configured to use the IP subnet addressing. **This example assumes the PC/Server has a static IP of 192.168.1.20 and a subnet of 255.255.255.0;**
7. Select "4" to enter the Subnet Mask (this example uses 255.255.255.0); and
8. Select "7" to Apply the settings.

Note: Consult with your IT Person / Network Expert to find out whether your network uses a DHCP server or not.

Configuring the Windows Folder Share Settings on the Tagger

To configure the Windows folder share settings, perform the following:

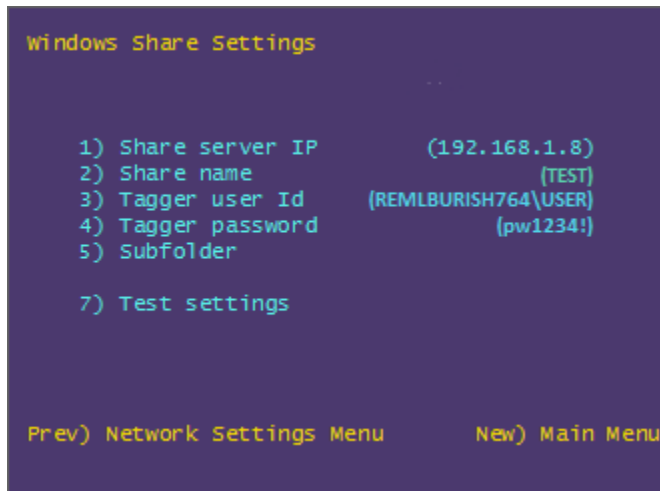
1. From the Tagger's *Main Menu* screen, select "6" for System Settings;



2. From the Tagger's *System Settings* screen, select "5" for Network Settings;
3. From the Tagger's *Network Settings* screen, select "2" for Windows Share Settings;

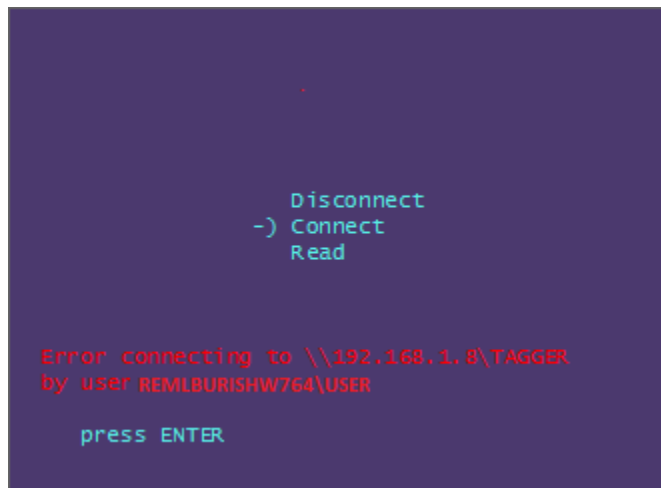
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4. From the Tagger's *Window Share Setting* screen, select "1" to enter the Share Server IP (example: 192.168.1.8);



5. Select "2" to enter the shared folder name (example used above: Test);
6. Select "3" to enter the Tagger's user ID of "REMLBURISHW764\user". This is the local "user" account created above for the local machine called "REMLBURISHW764";
7. Select "4" to enter the Tagger's password (example: pw1234!); and
8. Select "7" to test the settings. When there is no error present and the test reverts back to the Tagger's Windows Share Setting screen, all the network configuration and information is correct.

If you see the following error screen during testing either the network /share folder configuration has been entered incorrectly on both the PC/server and/or the Tagger or there is some network component or faulty hardware (network card, cabling, etc).



For a direct connection to the Tagger from a PC (not recommended) you will need to use a crossover cable, rather than a regular network cable.

Compared to standard Ethernet cables, the internal wiring of Ethernet crossover cables reverses the “transmit” and “receive” signals. The reversed color-coded wires can be seen through the RJ-45 connectors at each end of the cable: Standard cables have an identical sequence of colored wires on each end whereas crossover cables have the 1st and 3rd wires (counting from left to right) crossed, and the 2nd and 6th wires crossed. For simplicity in this Appendix, an account called **user** with a password of **pw1234!** is used.

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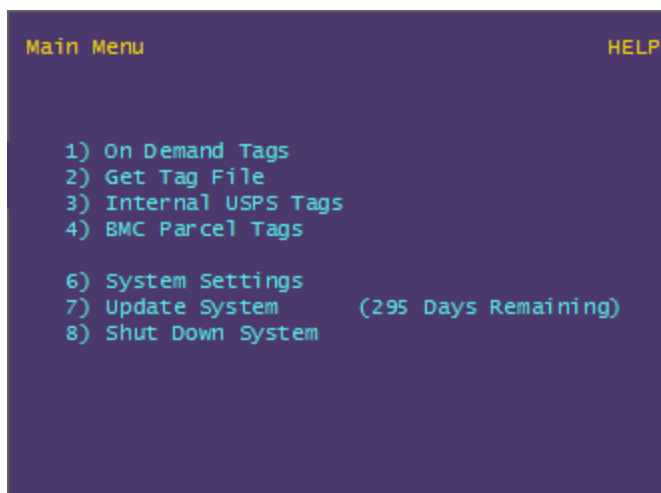
APPENDIX 2

CONNECTING TO THE TAGGER BT-850 BUILT-IN FILE SERVER FROM A WINDOWS PC

Set Up the Network Configuration on the Tagger

To be able to use the Tagger's built-in file server from a Windows PC begins with the set up of the network configuration on the Tagger itself.

1. From the Tagger's Main Menu screen, select "6" for System Settings;

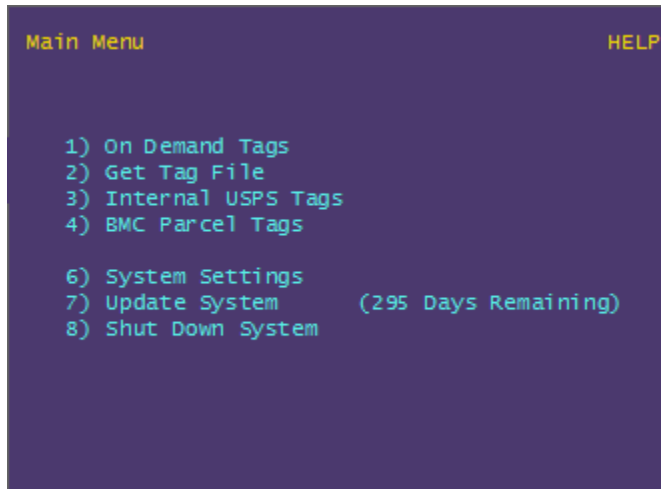


2. From the Tagger's *System Setting* screen, select "5" for Network Settings;
3. From the Tagger's *Network Setting* screen, select "5" for TCP/IP Settings;
4. Select "1" for Connect and select Wired option;
5. Select "2" for Source. Depending if your network has a DHCP server or not, pick the appropriate choice for either DHCP or STATIC IP (this example uses STATIC IP);
6. Select "3" to enter Tagger IP (our example will use a STATIC IP OF 192.168.10.161 for the Tagger). Make sure that the PC/server is configured to use the IP subnet addressing. **Note: Make sure that the PC/server is configured to use the same IP subnet addressing. a subnet of 255.255.255.0;**
7. Select "4" to enter the Subnet Mask (this example uses 255.255.255.0); and
8. Select "7" to Apply the settings.

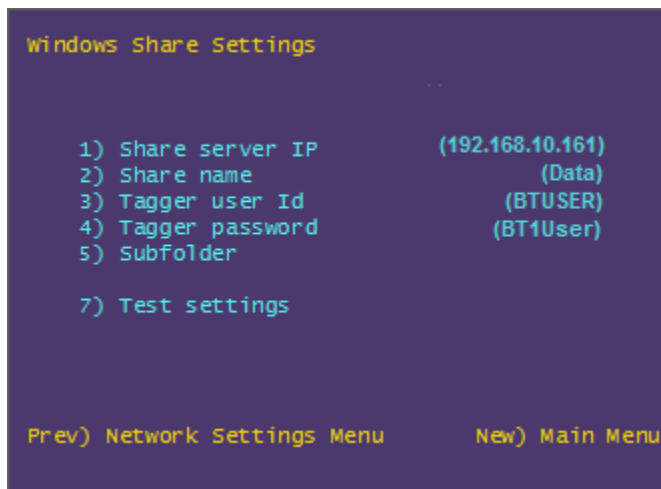
Configure the Windows Folder Share Settings on the Tagger

To configure the Windows folder share settings, perform the following:

1. From the Tagger's *Main Menu* screen, select "6" for System Settings;



2. From the Tagger's *System Settings* screen, select "5" for Network Settings;
3. From the Tagger's *Network Settings* screen, select "2" for Windows Share Settings;
4. From the Tagger's *Window Share Setting* screen, select "1" to enter the Share Server IP (example: 192.168.10.161);



5. Select "2" to enter the shared folder name (example used above: Data);
6. Select "3" to enter the Tagger's user ID of (example used above: BTUSER). This is the user ID required for accessing the Tagger's built in file server;

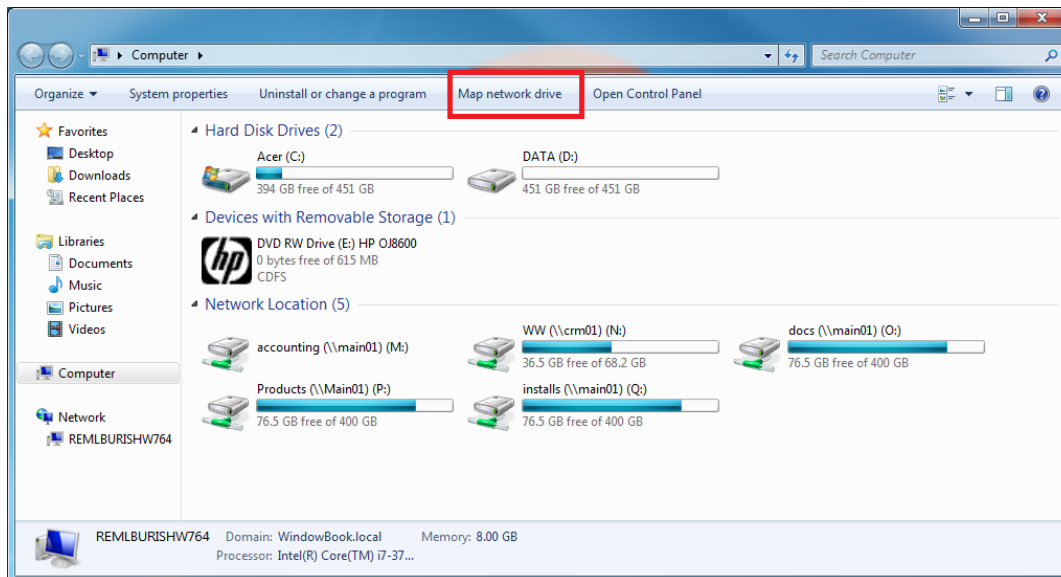
7. Select "4" to enter the Tagger's password (example used above: BT1user). This is the password required for accessing the Tagger's built in file server. Keep in mind, the password is case sensitive.

Map a Network Drive on the PC/Server to the Tagger's File Share

i The following set up instructions were performed on a PC/Server with a Windows 7 operating system (OS). Screen layouts and menu options may vary if the set up is being performed on a PC/server that has an OS other than Windows 7. Please refer to your local IT administrator with any questions.

To map a network drive to the Tagger's file share, perform the following:

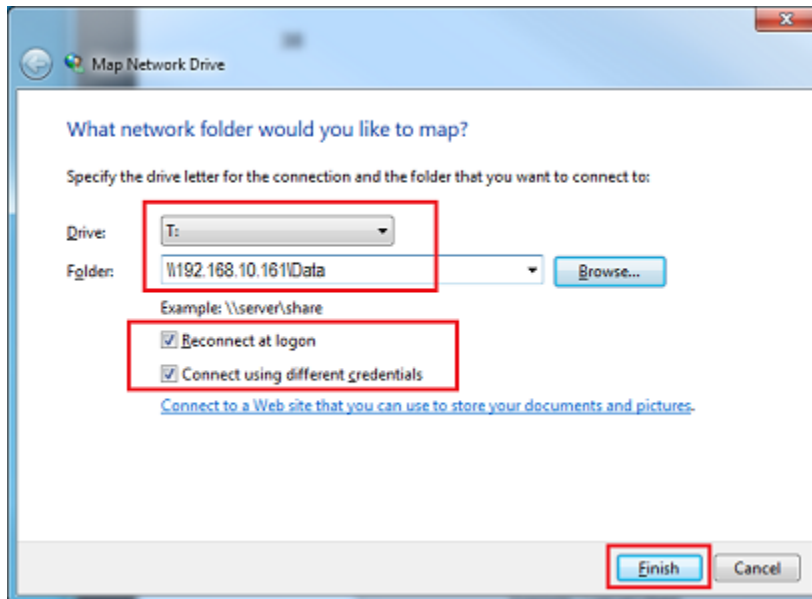
1. From the PC/server's desktop, double click 'Computer' to open it or click the **Start** button and select 'Computer' from the menu options;
2. Single click the option to 'Map Network Drive';



3. A *Map Network Drive* window will display. Select an available drive letter (this example uses "T:");

Appendix 2

4. In the same *Map Network Drive* window enter the complete folder path, including the IP address (e.g. [\\192.168.10.161\Data](#));



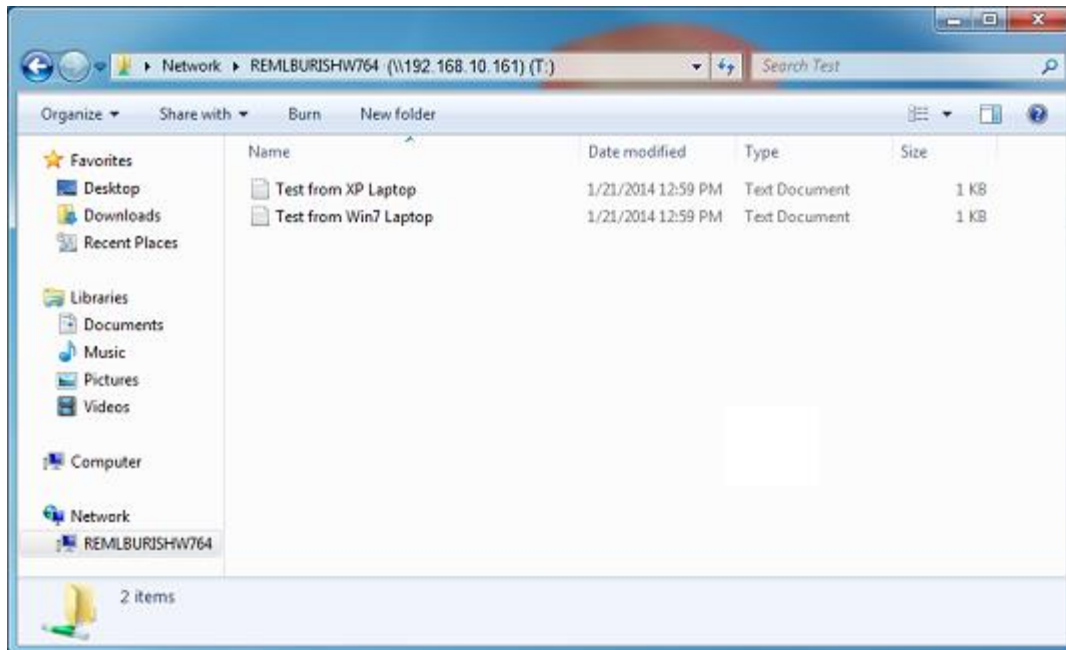
5. In the same *Map Network Drive* window Select 'Reconnect at Logon' to automatically reconnect to the Tagger's file share every time you log on to the PC/server (refer to image directly above under [step 4](#));
6. Also, select 'Connect Using Different Credentials' if your PC/server is configured for a domain/work-group (refer to image under [step 4](#) above);
7. Click the **Finish** button. If you selected 'Connect Using Different Credentials' an authentication dialog will display in order to be able to access the file share;
8. For the Username enter **BTUSER**;
9. For the Password enter **BT1user**;



Select the 'Remember my credentials' if you don't wish to have to reenter the user name and password each time you access the folder; and

10. Click the **OK** button.

If everything was configured correctly, you will see the Tagger's file share display and you can view the contents of the folder. In this example, there are two test files copied in the folder.



If you cannot access the Tagger's built-in file share verify that the IP configuration is correct and/or check for any typos - especially password credentials (which are case sensitive) (refer to [Step 4](#) above).

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APPENDIX 3

HOW POSTALONE! HANDLES SIBLING AND SPLIT TRAYS

There are rules and limitations when submitting Mail.dat files to PostalOne! that mailers should be aware of since they will impact how siblings and split trays are handled by PostalOne!.

PostalOne!’s qualification reports do not show sibling containers. There is an overflow tray indicator that could be used to show a tray has siblings but it is not particularly useful to verifiers and it often will not work. For it to work all such trays would have to be marked before the initial upload to PostalOne!. This is unlikely for many mailers resulting in a situation where sometimes the indicator will work and other times it will not. This will create confusion for both the verifier and the mailer so we avoid that situation by not using the indicator. Instead we have found it much better for mailers to supply a copy of either DAT-MAIL’s Trays on Pallets report or the Enhanced Qualification Report if their verifier needs help with verifying your sibling trays and pallets. Though PostalOne! is supposed to reduce paperwork, there is often the need for supplemental documentation and this is one such case.

Today, PostalOne! does not include sibling containers in postage statement container counts of non-MLOC jobs. This is a defect (ETR) that should be fixed at some point. It is possible that some BMEU’s may ask mailers who bring their mail to them to supply not just a DAT-MAIL report like the Enhanced Qualification Report or the Trays on Pallets report but also a postage statement created by DAT-MAIL that shows the siblings in their counts. This is particularly true if the mailing is drop shipped and is accompanied by 8125 forms. DAT-MAIL’s 8125’s will always include the siblings created by the Tagger so it may help the verifier to show them statements whose container counts will match the 8125.

When a mailer is ready to start using the Tagger on eDoc presented jobs, we recommend they talk to their verifier first about what kind of supplemental documentation they would like, if any, that would account for these added containers. It may help to print a trays on pallets report or an enhanced qualification report on a job you have added siblings to in order to show them what it is you can provide. In some cases, the verifier may not require any supplemental documentation.

Recommendations for Mailers that will Submit Siblings to PostalOne!

Do not upload your Mail.dat files to PostalOne! with “ready-to-pay” containers which will generate a postage statement until one of the following has taken place:

- You have added all of your siblings and imported them into DAT-MAIL; and
- You need to pay postage and must submit a Mail.dat file with ready to pay containers. If the payment is for a partial mailing, make sure not to pay for containers that are not being mailed or you won’t be able to add siblings to them later.

You can keep adding siblings to mailings that have been partially paid, as long as the containers that are going to be linked to siblings have not yet been paid either. If DAT-MAIL imports data from the Tagger and sees that a container that requires a sibling has already been paid, it will not attempt to add the

sibling and will report this as an error in the log that can be viewed from the “Whittier Tagger” menu in “Other Programs”.

Recommendations for Mailers that will Submit Split Trays to PostalOne!

Split trays do show up on the USPS qualification report which means you cannot submit any file to PostalOne! until all split trays tags have been printed and imported into DAT-MAIL. For mailers that either do not do partial mailings or produce the entire mailing before the first day’s mail is paid for, this will be no problem. Just wait until DAT-MAIL has added the new trays before your first submission.

If your mail production takes place over a number of days and you are also mailing over a number of days, you can still add new trays for these splits. When DAT-MAIL sees that a tray that was split was already submitted to PostalOne! but is still unpaid, it will add a sibling instead of splitting the tray.

But if you are doing the mailing over a number of days and splitting trays each day, you can handle this as follows. Before you do your first submission to PostalOne! which should be for the trays you are mailing on the first day, generate statements in DAT-MAIL for only the trays that are mailing that day, then split the mail.dat file so that the day’s mail shows up as a separate Mail.dat file. That is what you submit the first day. The next day you open the job with the rest of the containers and repeat the process so that each day you are submitting a separate mail.dat Job for that day’s mail. This will allow you to keep splitting trays right up to the completion of the job. This will work very well for drop shipped mailings in which all the mail for a group of entry facilities is being mailed each day. In this case the splitting of the Mail.dat files will not impact the qualification of the rates claimed nor will ever run the risk of trying to split a mailing across a pallet (which we don’t allow).

Follow these guidelines and you can enjoy the benefits of tray splitting on the largest mailings. Your trays will show up on both PostalOne! qual reports and statements so no supplemental documentation should be needed and your mail can be handled by DSMS consolidators and third party copal providers.

Limitations of the Current PostalOne! Submission Process

The above guidelines are based on current limitations in how PostalOne! works. This may change over time so these limitations are worth documenting. PostalOne! generates its qualification report only from the first Mail.dat upload. Once created, this qualification report can never be changed. Trays cannot be split after PostalOne! has received an original submission because the new trays cannot be added except as siblings. Siblings can be added right up to the time the original trays and pallets are paid, but not after payment.

APPENDIX 4

SETTING UP A 2D SCANNER SUPPLIED BY WHITTIER MAILING PRODUCTS OR WINDOW BOOK

If you purchased your scanner from either Window Book or Whittier Mailing Products it is probably a Honeywell Xenon 1900 series or a Motorola DS-4208. Most scanners will not scan these out of the box. Also, you want to make sure that there is a carriage return (CR) or carriage return–line feed (CRLF) added to the end of each scan. Also, some scanners may have the option to insert commas between the IMb data elements. Though it should be OK, it has not been tested. Also, some scanners that decode IMb's may add trailing zeros to 25 and 29 digit non-automation IMb's. This feature needs to be disabled as the Tagger does not support trailing zeros at this time.

Honeywell Xenon 1900 or 1902

Standard resolution wireless scanners: Before you use your scanner in production, scan the two barcodes below to program your 1900 series scanner to scan IMb's and provide a CR at the end of each scan.



POSTAL10.

Intelligent Mail Bar Code On



VSUFCR.

**Add CR Suffix
All Symbologies**

Scan the above barcodes before using your Xenon 1900 series scanner for the first time. You can do it right from the screen of your computer without having to print this page!

Motorola DS-4208

To enable Intelligent Mail Barcode printing, scan the barcode below:



To add a CRLF to the end of each barcode, scan the following barcode:



Your Motorola barcode reader is now ready for use.