



DAT-MAIL™ BT 900 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 the new 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

This document is composed of 3 main sections (in the following order): 1) DAT-MAIL BT-900 Quick Start Guide, which contains instructions how to perform some of the more basic and/or common operational procedures of the BT-900 in conjunction with DAT-MAIL; 2) DAT-MAIL BT-900 Reference Guide, which documents the DAT-MAIL/BT-900 interface in its entirety; and 3) Appendices 1 through 4, which contain supplemental information pertaining to the DAT-MAIL BT-900 interface in regards to DAT-MAIL/BT-900 setup and configuration, PostalOne!, and 2D barcode scanning.



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 Plug-in (version 8.0.2.86 or newer) is required for imports of BT-900 data for DAT-MAIL versions 11.15.17.05 or newer.

OVERVIEW

Window Book's interface to the Whittier Mailing Products (WMP) Barcode Tagger 900 IMb (BT-900) allows mailers to do the following:

- Transfer Mail.dat information to the BT-900 via a network share or USB flash drive:
 - When a network share is used to transfer data to a BT-900, Mail.dat information can be made available to the BT-900 automatically whenever a Mail.dat file is imported;
 - If the mailer has only one BT-900, they can also use the BT-900'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 BT-900;
 - 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 BT-900 when multiple BT-900's are present.
- Update extraneous line information during so that extraneous line of the BT-900's tray tags will have the same information that DAT-MAIL's own tray tags have;
- Provide the BT-900 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 BT-900 for sibling or “split” tray tags and pallet labels and add this data to the correct Mail.dat file. This import is done automatically using Window Book’s Automation Scheduler IM Scan plug-in.

Once the BT-900 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:
 - 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!

Whittier Mailing Products’ Barcode Tagger 900 IMb uses LCD Touch Screen technology (touch screen navigation system) vs. the menu tree structure that is used throughout the 800 series of Taggers; therefore, earlier Tagger models cannot be upgraded to the BT-900.

QUICK START GUIDE

DATA TRANSFER SETUP

Data can be uploaded to the BT-900 by various means (more detail to follow); however, before any of the procedures detailed in this Quick Start Guide can be performed, one of these connection types must have already been established. To assist you, this Quick Start Guide contains appendices that provide procedures on how to set up and configure connections to a local PC/server for easy and automatic data transfer.

If you are using a 2D imager/scanner to scan IMb's for re-printing 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 directly from this document to set up the Honeywell imager (refer to [Appendix 5](#) for more information).

DAT-MAIL DATA TRANSFER

This Quick Start Guide describes how to set up the DAT-MAIL data transfer using either a network share (refer to [Appendix 1](#) for network share setup instructions; or the share built into the BT-900 itself (refer to [Appendix 2](#) for those instructions). If you plan on using a USB drive to transfer data instead of a share, please refer to the [BT-900 SETUP FOR TRANSFERRING DATA](#), specifically [USB FLASH DRIVE](#) found in the Reference Guide portion of this document.



This procedure assumes that a connection to the local PC/Server has already been set up.

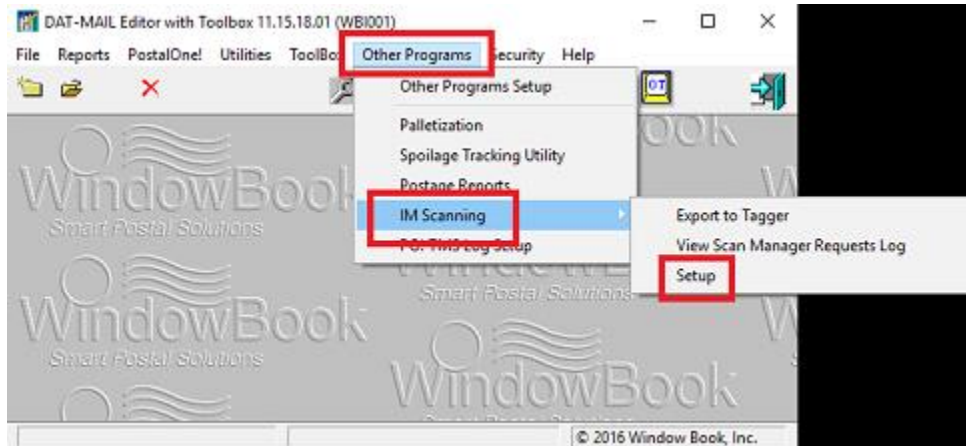
To set up the DAT-MAIL data transfer, perform the following:


1. Power ON the BT-900;
2. Within DAT-MAIL (all program functions should be closed), select 'Other Programs' from the top-line menu bar;

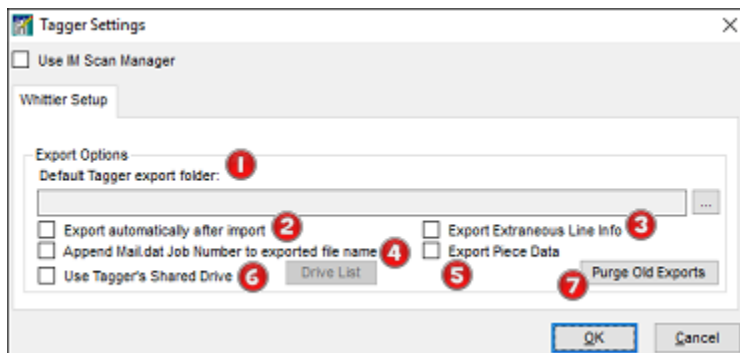


DAT-MAIL's BT-900 interface is currently a standard feature of DAT-MAIL software versions 11.15.17.05 or newer.

3. Select the 'IM Scanning' menu option, and then the 'Setup' menu option;



4. The *Tagger Settings* screen will display. Browse for  and select the folder you will be exporting your BT-900 data to **1**. This will either be the network share you setup for the BT-900 (refer to [Appendix 1](#) for instructions) or the UNC path name of the BT-900's own share (refer to [Appendix 2](#) for instructions);



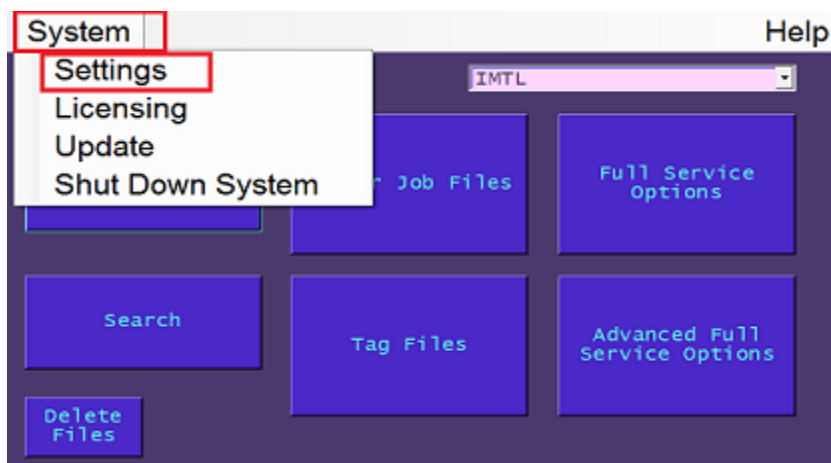
- If you are using a share either on your network or the BT-900 to exchange data, select the "Export Automatically after Import" (refer to call out **2** in the image above);
- If you use DAT-MAIL to print tray tags today, select "Export Extraneous Line Info" so the same information will print on the extraneous lines of the tags printed by the BT-900 (refer to call out **3** in the image above);
- If you cannot rely on your Mail.dat files to include the job number in the file name, select "Append Mail.dat Job Number to exported file name" (refer to call out **4** in the image above) – refer to the [APPEND MAIL.DAT JOB NUMBER TO THE EXPORTED FILE NAME](#) section in this Guide for more information;
- 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-900 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 BT-900 and are using the BT-900's internal file shares instead of a single share on your own network to exchange data, select "Use Tagger's Share Drive" and click the **Drive List** button (refer to [EXAMPLE: MULTIPLE BT-900 SETUP](#) located in this document for information on how to create a list of BT-900's and their mapped drives or UNC path names) (refer to call out 6 in the image above);
 - 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](#) for more information);
5. Click the **OK** button to save your settings. You are ready to setup the BT-900 side of the Interface!

BT-900 DATA TRANSFER

Configure Tray Tag Type and Mailer ID

1. Confirm that DAT-MAIL is set as the BT-900's sorting software. To do so, from the *Main Menu* touch screen, gently touch or tap the 'Settings' menu option located in the upper left corner of the top-line menu bar, and then select the 'Settings' menu option;

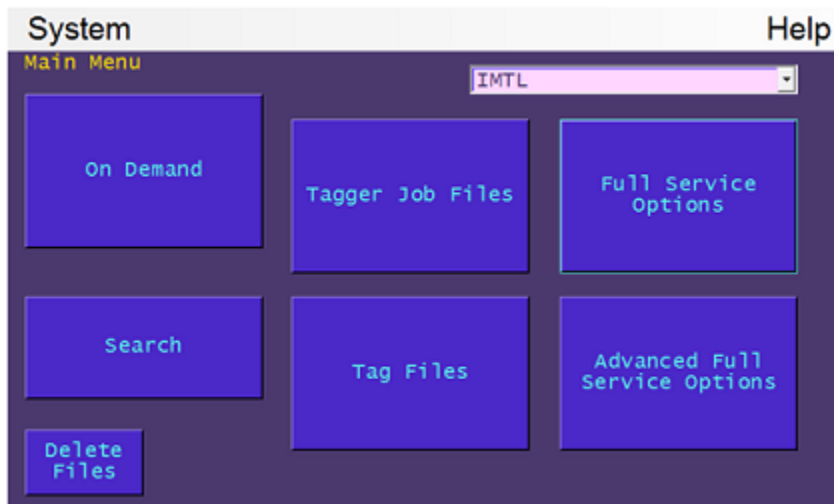


- The *Settings* touch screen will display. Gently touch or tap the **Additional Settings** touch button

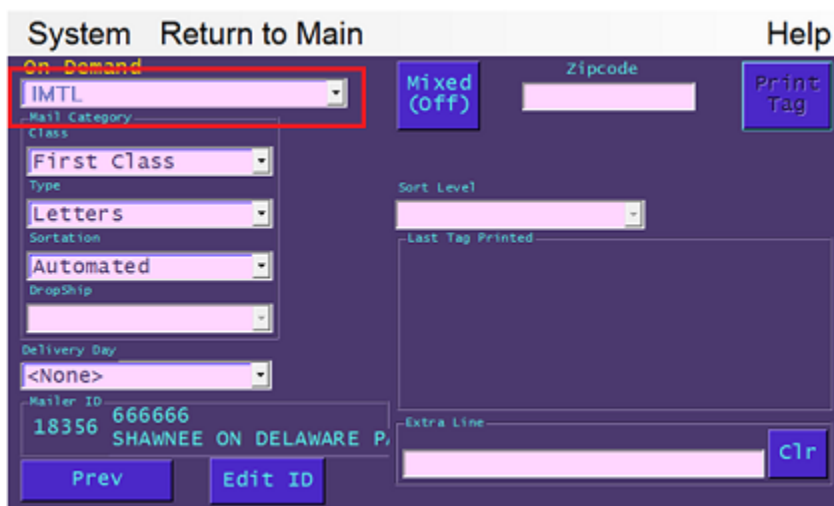
- The *Additional Settings* touch screen will display. The **Sorting Software** touch button toggles between two values when tapped: 'None'; and 'DAT-MAIL'. Whichever option the BT-900 is set to will display immediately above the **Sorting Software** touch button;
- Confirm that the value displayed is 'DAT-MAIL'. If 'None' is displayed, gently tap or touch the **Sorting Software** touch button to set the value to 'DAT-MAIL';

- Tap or touch the 'Return to Main' menu option located in the top-line menu bar of the screen to display the BT-900's *Main Menu* touch screen;

6. From the BT-900's *Main Menu* touch screen, gently tap the **On Demand** button;



7. The *On Demand* touch screen will display. Lightly tap or touch anywhere on the tray tag type field which is located directly below the 'On Demand' label and select 'IMTL' from the list;



8. Specify your mail 'Class', 'Type', and 'Sortation' method used by lightly tapping or touching each of the respective fields and selecting one of the options from the drop down menu that will display;

9. If the “Export Extraneous Line Info” option has been checked in the Tagger Settings screen within DAT-MAIL (refer to [step 6](#) under [DAT-MAIL DATA TRANSFER SETUP](#), above), lightly touch or tap anywhere in the ‘Extra Line’ field located in the BT-900’s *On Demand* touch screen;

The screenshot shows the 'On Demand' screen with the following fields and values:

- System:** Return to Main
- Help:**
- On Demand:** IMTL
- Mixed (off):** (button)
- Zipcode:** (empty field)
- Print Tag:** (button)
- Mail Category:** First Class
- Class:** Letters
- Type:** Automated
- Sortation:** (empty field)
- DropShip:** (empty field)
- Delivery Day:** <None>
- Mailer ID:** 666666
- 18356 SHAWNEE ON DELAWARE P.**
- Sort Level:** (empty field)
- Last Tag Printed:** (empty field)
- Extra Line:** (empty field, highlighted with a red rectangle)
- Prev:** (button)
- Edit ID:** (button)
- Clr:** (button)

10. An alpha-numeric keypad will display. Enter the information that is to be contained/displayed in the extraneous line and exported, and tap the **Enter** key on the keypad when finished. The keypad will close and you will be returned to the *On Demand* touch screen. The Extra Line field will be populated with the data you just entered;

The screenshot shows the 'On Demand' screen with the following fields and values:

- System:** Return to Main
- Help:**
- On Demand:** IMTL
- Mixed (off):** (button)
- Zipcode:** (empty field)
- Print Tag:** (button)
- Mail Category:** First Class
- Class:** Letters
- Type:** Automated
- Sortation:** (empty field)
- DropShip:** (empty field)
- Delivery Day:** <None>
- Mailer ID:** 666666
- 18356 SHAWNEE ON DELAWARE P.**
- Sort Level:** (empty field)
- Last Tag Printed:** (empty field)
- Extra Line:** 111-999-ABC
- Prev:** (button)
- Edit ID:** (button)
- Clr:** (button, highlighted with a red rectangle)



All of the alpha-numeric keypads that can be displayed within the various BT-900's touch screens can be moved anywhere on their respective screens by lightly pressing and holding the black title bar located on the top of the keypad, and dragging the keypad left, right, up or down. When a keypad is initially displayed, it is in a minimized state. To maximize the keypad or make it larger, double-tap on the keypad's black title bar. To return it to a minimized state, double-tap the the black title-bar a second time.

If, after anytime you wish to remove the contents in the ‘Extra Line’, lightly tap or touch the **Clr** (clear) button (see image above) and the field’s contents will be cleared/removed.

11. From the *On Demand* touch screen, the Mailer ID information is displayed and can be entered and/or edited. Gently touch or tap the **Edit ID** button;

System Return to Main Help

On Demand

IMTL Mixed (off) Zipcode Print Tag

Mail Category Class

First Class

Type Letters

Sortation Automated

DropShip

Delivery Day <None>

Mailer ID 666666 18356 SHAWNEE ON DELAWARE P.

Prev Edit ID

Sort Level

Last Tag Printed

Extra Line clr

12. The *Mailer Information* touch screen will display. Gently touch or tap in the Mailer ID field to enter a Mailer ID or edit any existing data;
13. If a Mailer ID already exists and you want to edit it, tap in the area of the field that is empty (far right) so the cursor is positioned at the end of the displayed text;
14. Press the **Del** key found on the front of the BT-900 until the field is empty;

Using the same keypad located on the front of the BT-900, enter one of your company's six or nine digit Mailer IDs. Window Book recommends that you use a Mailer ID that is not usually used to generate tray tags to avoid any possible conflict with other data sources;

If the Zip code needs editing, perform the same actions for the Zip code;

Gently tap or touch the **Saved** button on the *Mailer Information* touch screen when done;

System Return to Main Help

Mailer Information

MailerID Zipcode originLine

666666 51551 MALVERN IA

Saved

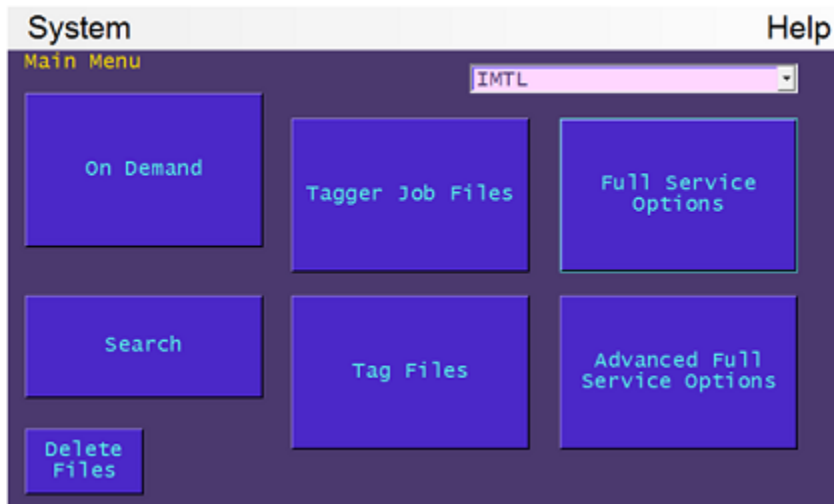
Prev

15. Gently tap or touch the 'Return to Main' menu option located in the top-line menu bar of the screen to display the BT-900's *Main Menu* touch screen.

Set Log File Location

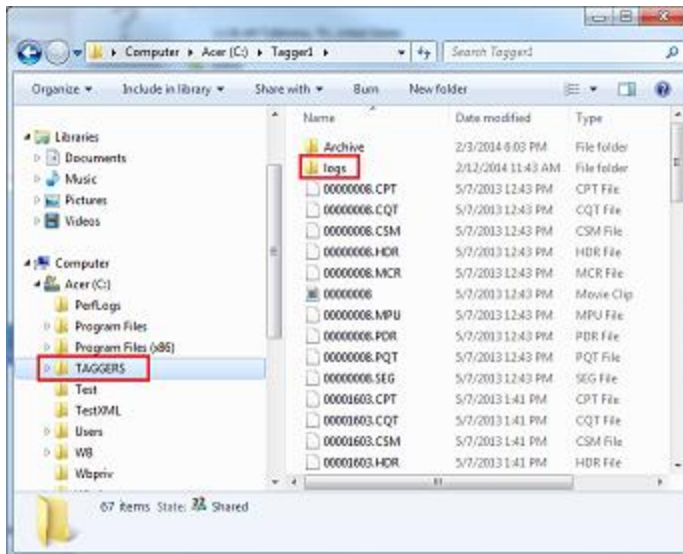
To set the log file location, perform the following:

1. Load a Mail.dat file. From the BT-900's *Main Menu* touch screen, gently tap or touch the **Advanced Full Service Options** button (commonly referred to as AFSO);



2. The BT-900's AFSO *File Type* touch screen will display. Gently tap or touch the 'File Type' field and select (tap) "Mail.dat";
3. Gently tap or touch the 'File Location' field and select the location type of where the Mail.dat file that the BT-900 will export to DAT-MAIL from is stored. Available options are: 'FTP'; 'Share'; 'Store'; and 'Flash'. For this example, select the 'Share';
4. Once the file location is specified, all available Mail.dat files will be displayed in the window immediately below the 'File Location' field. Select an appropriate Mail.dat file to load and gently tap or touch the **Load** button in the bottom left corner of the touch screen;
5. The selected file will load and you will be returned to the AFSO touch screen that now contains additional options and functionality;

- If the 'Log File Location Field' located in the top, right corner of the screen is set to the same location as in [step 3](#) above (where the Mail.dat file was loaded from – in this example “Network Shared Folder”), the '\Logs' sub-folder will be automatically created for you;



If, for whatever reason, it is desired to save the log files to a USB drive or to the file server located on the BT-900:

- Gently tap or touch the **Change Log File Location** button;
- Then gently tap or touch anywhere in the 'Log File Location Field' and select a different location (a USB Flash Drive must be connected to the Tagger if the “USB Flash Disk” option is selected). At this point you will be required to manually create the '\Logs' folder at whichever of the two other locations is selected.



The 'Logs' folder can also be created manually under the network share through Windows Explorer if setup in DAT-MAIL's Tagger Settings screen is required prior to loading a Mail.dat file.

USING THE DAT-MAIL/BT-900 INTERFACE: BT-900

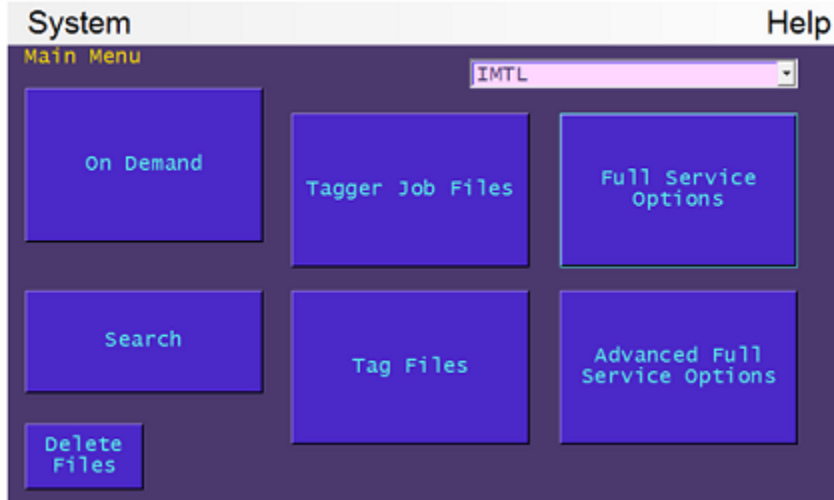
Retrieving the Mail.dat File for a Job (Required for All functions)

Once the File Location is set, the next step is to find the specific file. If there aren't too many files located in the share (or whatever location type you're using i.e. 'Share', 'Store', or 'Flash'), the task of finding and selecting the file to load is relatively easy; however, if there many files present, it is probably easier to perform a search in order to find and load the wanted file.

SELECT FROM LIST

To select the MAIL.dat file directly from the file location, perform the following:

1. From the BT-900's *Main Menu* touch screen, gently tap or touch the **Tag Files** touch button;



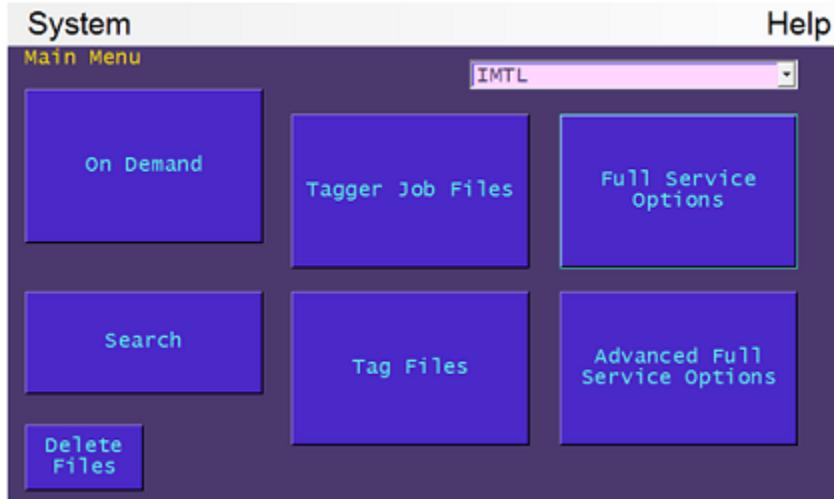
2. The *Load Files* touch screen will display. Based on the settings specified in [Set File Location](#) above, the BT-900 should automatically default to the list of available Mail.dat files (in this example, the File Type is 'Mail.dat', and the File Location is 'Share');
3. Locate the file you want from the list and gently tap or touch the file name to highlight it;
4. Gently tap or touch the **Load** touch button; The selected file will load and the *Print Tag File* touch screen will display;
5. From the *Print Tag File* touch screen you can print various tag types for the entire file, a single tag, or a range of tags; and you can also view a tag before printing it.

From this screen, you can also go to the *Full Service Options* touch screen for more options.

SEARCH OPTION

To search for and select a specific Mail.dat file, perform the following:

1. From the BT-900's *Main Menu* touch screen, gently tap or touch the **Search** touch button;



2. The *Load Files* touch screen will display. Based on the settings specified in [Set File Location](#) above, the BT-900 should automatically default to the list of available Mail.dat files (in this example, the File Type is 'Mail.dat', and the File Location is 'Share');
3. You can search for the file you want by job number:
4. Gently tap or touch in the 'Search' window and using the keypad on the front of the BT-900, enter the numeric portion of the job number you are looking for. A list of full and partial matches will be displayed; while entering the whole job number will list all versions for the job;
5. Gently touch or tap the file you want to highlight it and tap or press the **Load** button;
6. The *Advanced Full Service Options* touch screen will display. From this touch screen you can Edit the Mailer ID; Change Log File Location; access the *Full Service Options* touch screen; and perform various functions related to printing, splitting trays, deleting trays, creating siblings, selecting trays, and scanning spoilage.

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.

To print sibling tags, perform the following:

1. Select and load the Mail.dat file for the appropriate job (refer to [Retrieving the Mail.dat File for a Job \(Required for All Functions\)](#);

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2. From the *Advanced Full Service Options* touch screen, gently tap or touch the **Generate Siblings from Scanned Tag** touch button; and
3. Scan the original tag that overflowed and a new tray tag will be printed. Place 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.



A 2D scanner/imager is required for this procedure.

To split a tray, perform the following:

1. Select and load the Mail.dat file for the appropriate job (refer to [Retrieving the Mail.dat File for a Job \(Required for All Functions\)](#));
2. From the *Advanced Full Service Options* touch screen, gently tap or touch the **Split Tray from Scanned Tag** touch button;
3. Scan the original tray tag that overflowed and a new tray tag will be printed; and
4. Scan the IMb on the first mail piece that was 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.



A 2D scanner/imager is required for this procedure.

To delete a tray, perform the following:

1. Select and load the Mail.dat file for the appropriate job (refer to [Retrieving the Mail.dat File for a Job \(Required for All Functions\)](#));
2. From the *Advanced Full Service Options* touch screen, gently tap or touch the **Delete Tray** touch button; and

3. Scan the tray tag you want to remove from the mailing.

Reprinting Tray Tags by Scanning a Piece Barcode



A 2D scanner/imager is required for this procedure.

To reprint tray tags by scanning a piece barcode, perform the following:

- Select and load the Mail.dat file for the appropriate job (refer to [Retrieving the Mail.dat File for a Job \(Required for All Functions\)](#)); and
- From the *Advanced Full Service Options* touch screen, gently tap or touch the **Reprint Tray from Single Piece** touch button. You can scan any piece of mail in the tray and the replacement tag will be printed.



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.



A 2D scanner/imager is required for this procedure.

To print all tray tags for a pallet by scanning a placard barcode, perform the following:

1. Select and load the Mail.dat file for the appropriate job (refer to [Retrieving the Mail.dat File for a Job \(Required for All Functions\)](#));
2. From the Full Service Options touch screen, gently touch or tap the **Print Trays from Pallet Scan** touch button; and
3. Scan the pallet placard. You will be asked if you want to print 'n' tags – '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).

This brings to a close the DAT-MAIL BT-900 Tagger Quick Start Guide.

REFERENCE GUIDE

THE INTERFACE: HOW IT WORKS

The BT-900 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 BT-900, we recommend that you use a “share” to exchange data with DAT-MAIL. If you have only one BT-900, that share can be on the BT-900 itself (refer to [Appendix 2](#) for setup instructions). If you have multiple BT-900's, 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 BT-900 after a Mail.dat is imported.

If you do not have the BT-900 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 BT-900. The import of the sibling tray data would have to be manual, not automatic, however.

You can also setup the BT-900 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.

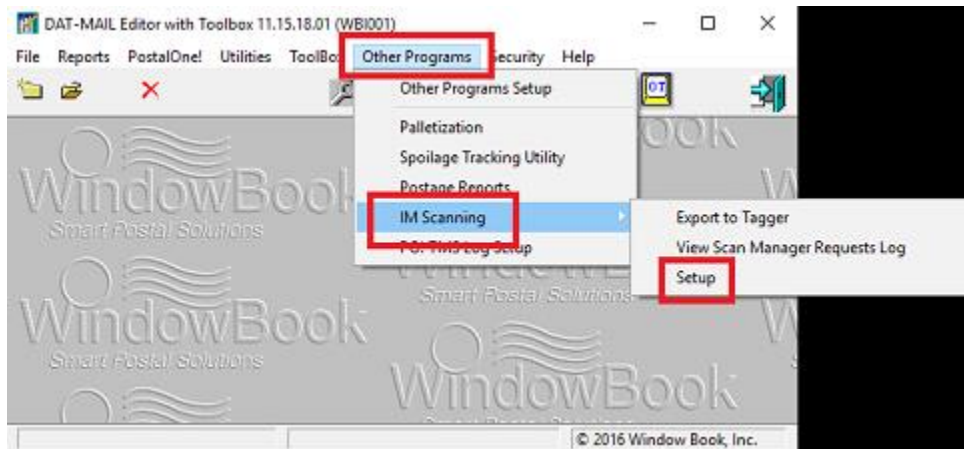
There are two ways DAT-MAIL can provide data to a Tagger:

- 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
- Manually using the **Export to Tagger** button on the Advanced Navigator screen or the “Export to Tagger” option on found by selecting “Other Program” from DAT-MAIL's top line menu, then “IM Scanning”. 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.

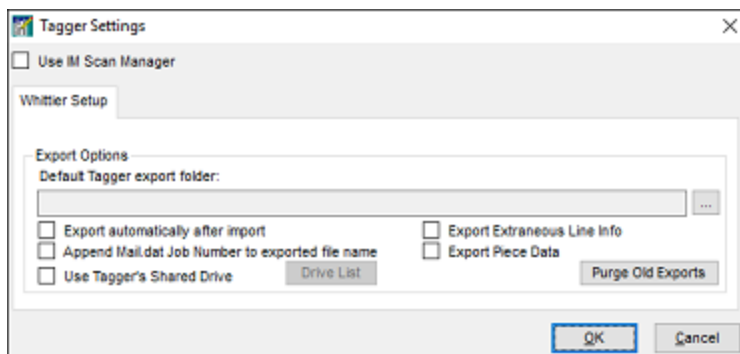
Once DAT-MAIL has transferred the data to a share or USB flash drive, the BT-900 can read the file, print or reprint tray tags and create “sibling” tags. If sibling tags are created, a new barcode number is generated and recorded in a log file that is saved to a “Logs” sub-folder in the share or USB flash drive. DAT-MAIL can import the log data and update these tags to the appropriate Mail.dat files 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 BT-900 occurs within DAT-MAIL's *Tagger Settings* screen. To access this screen, close all other program functions in DAT-MAIL and then from the top-line menu bar, select 'Other Programs' > 'IM Scanning' > 'Setup':



The *Tagger Settings* screen will display.




Export Options

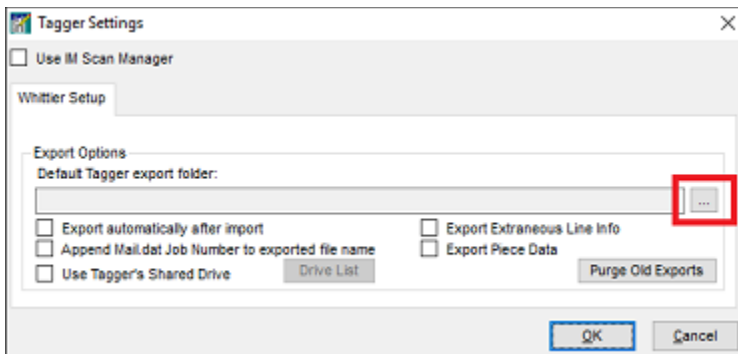
DEFAULT TAGGER EXPORT FOLDER

You can set the default export folder to the UNC folder name used by the network share that the Tagger will be connected to.

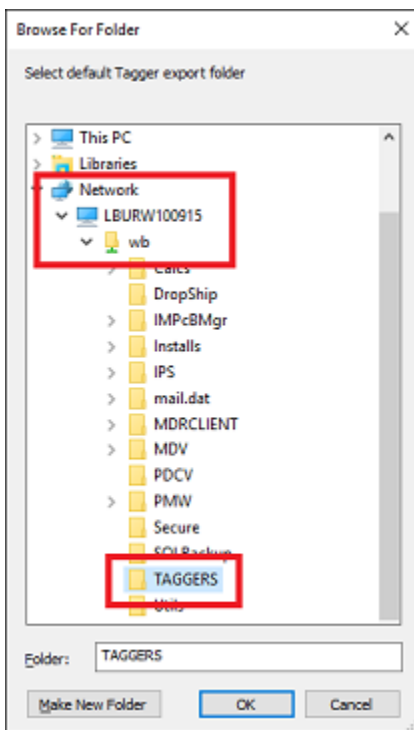
If you are transferring the data to the Tagger using a USB flash drive, insert it then select it as the export folder. You will need to reinsert a USB flash drive before you export files.

To set the default export folder (in this instance to a network share), perform the following:

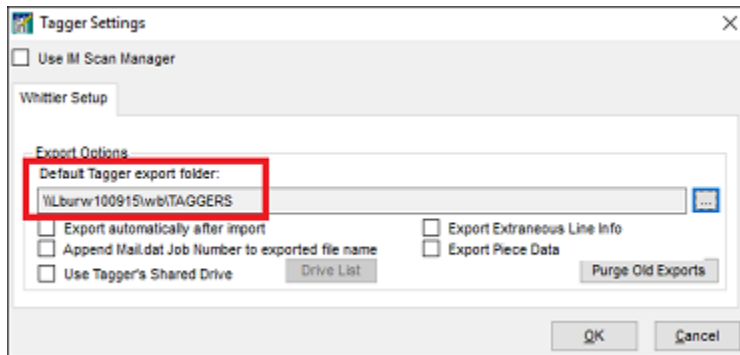
1. From the Tagger Settings screen will display. Click the browse  button;



2. The Browse for Folder dialog will display. Locate and single-click on the network share you want to export to and click the **OK** button; and



3. Confirm the change made to the specified default export folder in the *Tagger Settings* screen.



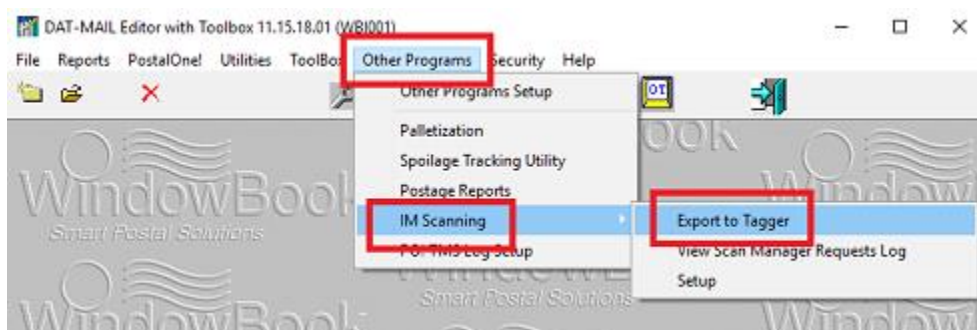
EXPORT AUTOMATICALLY AFTER IMPORT

This feature sends data to the BT-900 share automatically after a Mail.dat file is imported. To use this feature you must be exporting data to the BT-900 via a share.

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

- If you change your entry points on drop shipped mailings and print the entry point designation on the extraneous line of your tray tags;
- If you have multiple BT-900s and wish to send data to a specific BT-900. When you export the files manually, you can pick which BT-900 to send the data to; and/or
- If you export your data to USB flash drive.

In the three cases above it is better to export data to the BT-900 from either the DAT-MAIL Advanced Navigator window or by selecting the "Export to Tagger" menu option found in DAT-MAIL under 'Other Programs' > 'IM Scanning'.

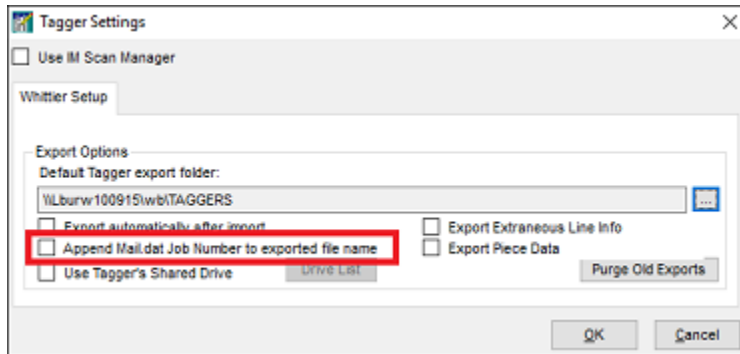


APPEND MAIL.DAT JOB NUMBER TO THE EXPORTED FILE NAME

When you export a file for use by the BT-900, the file name is going to be the same name used in the Mail.dat file that was imported by DAT-MAIL. We strongly recommend 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.

To automatically append the job number to the exported file name, perform the following:

1. From DAT-MAIL's top-line menu, select 'Other Options';
2. Select 'IM Scanning';
3. Select 'Setup'; and
4. The Tagger Settings screen will display. Select the option to 'Append Mail.dat Job Number to exported file name'.



EXPORT EXTRANEOUS LINE INFORMATION

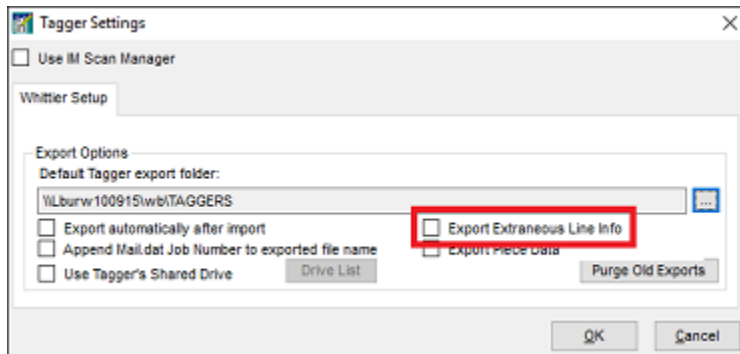
DAT-MAIL has the ability to format the extraneous line of the tray tag to include data you may want to use in production. This data will appear on tray tags that DAT-MAIL prints. If you enable this feature, it will alter the extraneous data sent to the BT-900 so it will print the same information. There are; however, two limitations to be aware of:

- 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
- The BT-900 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 BT-900 it is not updated back to the original Mail.dat file.

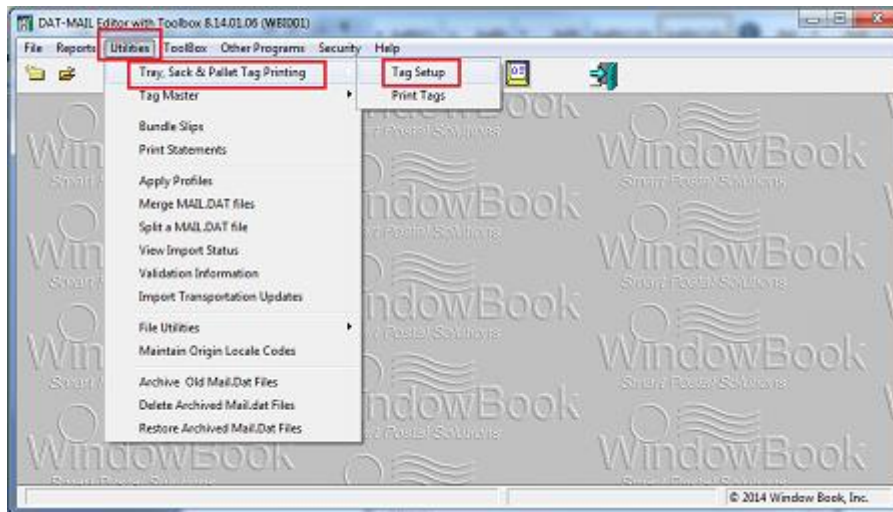
If you are already using this feature to configure the extraneous line printed by DAT-MAIL, you do not need to do anything else. Your current settings will be used.

If you are **not** using this feature for tags printed by DAT-MAIL, but would like to use it for tags printed by the BT-900, follow these instructions:

1. From the *Tagger Settings* screen within DAT-MAIL, select the option to 'Export Extraneous Line Info';

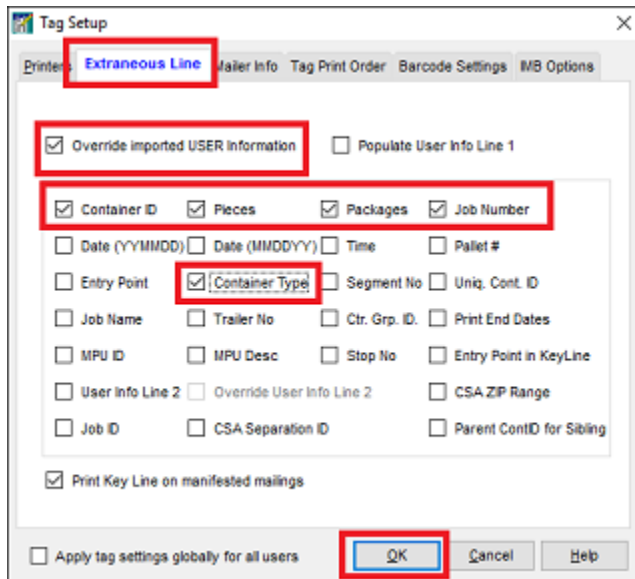


2. Click the **OK** button;
3. Within DAT-MAIL, click on 'Utilities' from the top-line menu;
4. Select 'Tray, Sack and Pallet Tag Printing', and then 'Tag Setup';



5. The Tag Setup screen will display. Select the 'Extraneous Line' tab;

- Select (check) the option to 'Override imported USER information', as well as the items you want to be printed on the extraneous line (be careful not to exceed the 40-character limit);

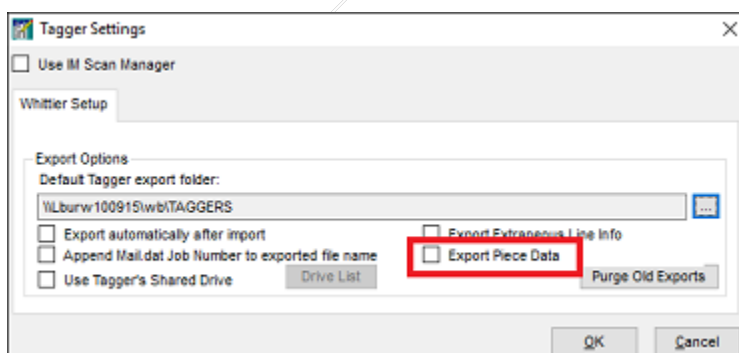


- Click the **OK** button when finished.

i The option to include extraneous line information also resides within the BT-900; however, the extraneous line information can only be typed in using a keypad on the BT-900. The user is unable to automatically import specifically defined and formatted fields related to the job itself; therefore, Window Book recommends the use of this feature from within DAT-MAIL for better utilization and production results.

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 BT-900 must have single piece data. Selecting (checking) the 'Export Piece Data' option on the *Tagger Settings* screen in DAT-MAIL will provide that data.



i Selecting the 'Export Piece Data' option will provide the necessary data; however, you must be creating either PBC or PDR single piece files in your Mail.dat files. DAT-MAIL must also not be "parking" these files.

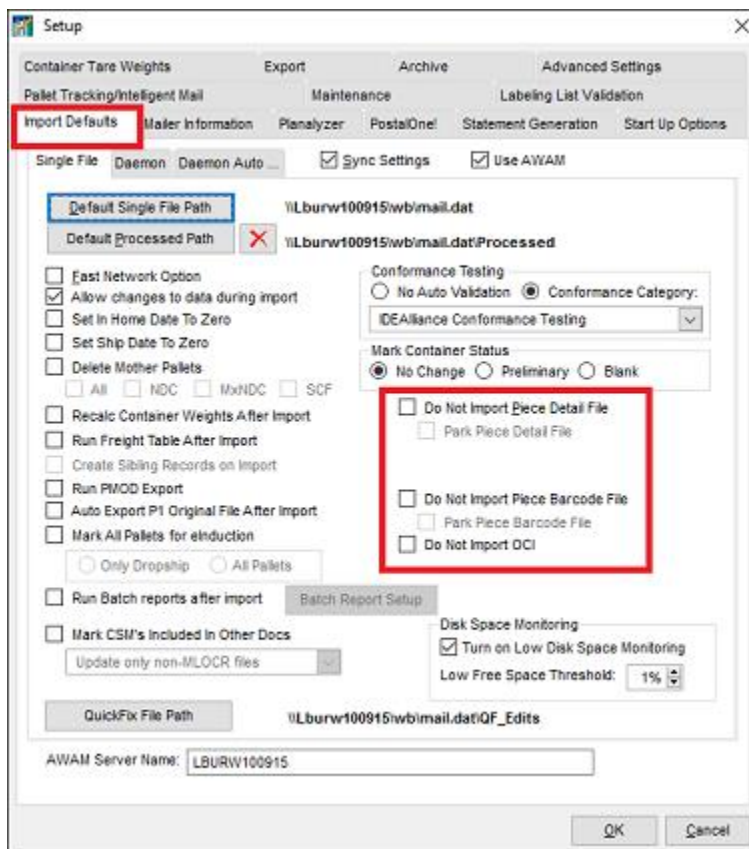
To confirm that DAT-MAIL is not “parking” piece detail or piece barcode files, perform the following:

I-1. From DAT-MAIL’s top-line menu, select ‘File’ > ‘Program Settings’ > ‘Program Setup’;

I-2. The Setup dialog will display. Select the ‘Import Defaults’ tab if it is not already displayed and confirm the following:

- **The option ‘Do Not Import Piece Detail File’ and its sub-option of ‘Park Piece Detail File is not selected (checked); and**
- **The option ‘Do Not Import Piece Barcode File’ and its sub-option of ‘Park Piece Barcode File is not selected (checked).**

Below is an example of how the Import Defaults screen, specifically the ‘Do Not Import Piece Detail’ and ‘Piece Barcode’ options should appear:



USE TAGGER'S SHARED DRIVE

When sharing data with the BT-900 over a network, you have a choice of storing this data on a shared drive on your network or the BT-900's internal file share.

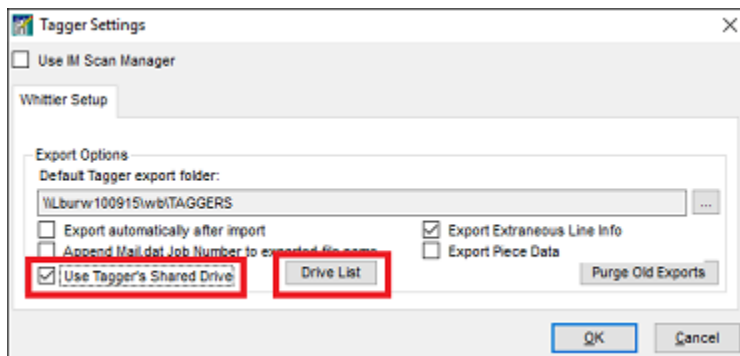
If you prefer to store the data on the BT-900's internal file share, it does not matter if you have a single Tagger or multiple Taggers. When you select this option you would then press the adjacent **Drive List**

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-900 it will look in all paths listed for the 'Logs' folders that hold the data being sent to DAT-MAIL.

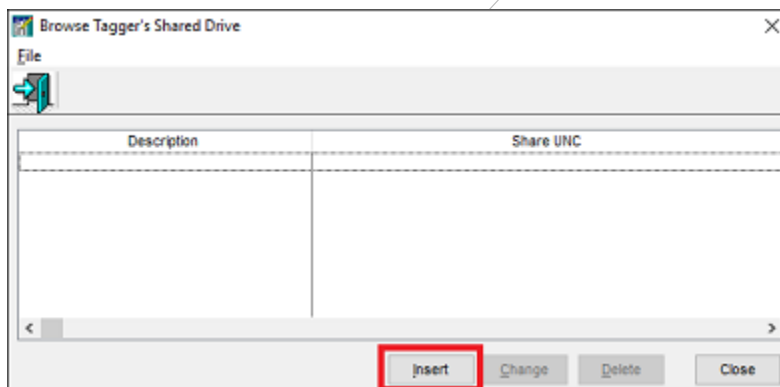
i *This feature is only necessary if you use the shares located on each Tagger to exchange data with DAT-MAIL. If a network share is used to exchange data, this option does not require setup.*

To enable this feature, perform the following:

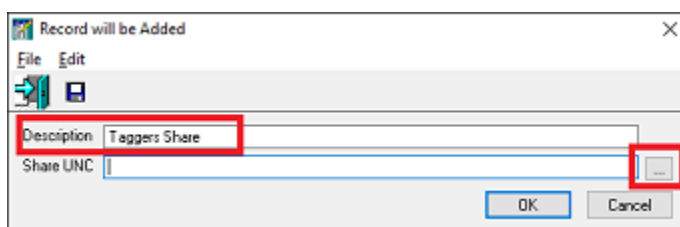
1. From the *Tagger Settings* screen, select the option to 'Use Tagger's Shared Drive';



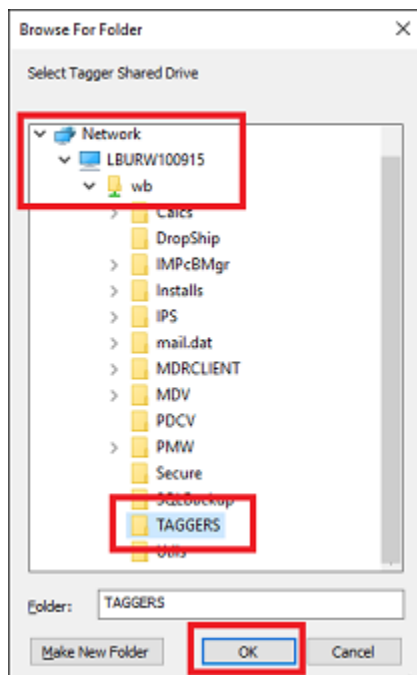
2. Click the **Drive List** button;
3. The *Browse Tagger's Shared Drive* screen will display. Click the Insert button to add a new Tagger;



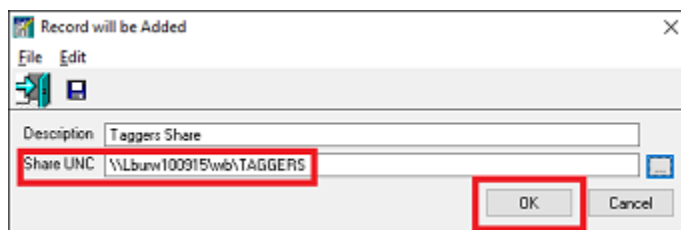
4. The *Record will be Added* screen will display. Type a description for the Tagger share and then type in or browse for the Share UNC path by clicking the browse button;



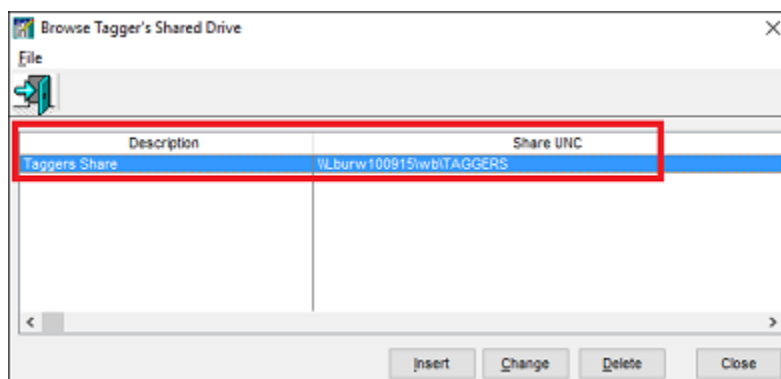
5. Locate the network share and select it. Click the OK button;



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-900 data.

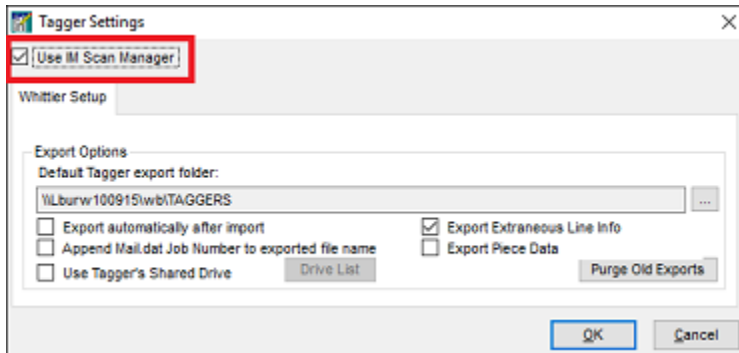


The Automation Scheduler does not tie up a workstation license which means you can do automated processing of Tagger logs even on a single user version of DAT-MAIL.

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

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 performed by the system.

BT-900 SETUP FOR TRANSFERRING DATA

When setting up the BT-900/DAT-MAIL interface, you need to first decide which four of the supported configurations you wish to use:

NETWORK SHARE

Use a network share to exchange data between the BT-900 and DAT-MAIL. This configuration can support automated export and import (via the Automation Scheduler IM Scan Manager plug-in) and is the most straightforward. The BT-900 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 BT-900 to it can be found in [Appendix 1](#) of this document.

BT-900 INTERNAL FILE SERVER OR SHARE

Use the BT-900's internal file server or share to exchange data to and from DAT-MAIL. You will have to map the BT-900's internal 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 BT-900's internal share can be found in [Appendix 2](#) of this document. 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..

USB FLASH DRIVE

There are two ways to use a USB flash drive to transfer data to and from the BT-900. They are:

- **Automated** - 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
- **Manual** - 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.

FTP



Window Book does not support this method of connection between DAT-MAIL and the BT-900.

Once you have decided which configuration to use, set up the BT-900 accordingly.

Communicating with a Network Share

If you create a share on your network, you need to tell the BT-900 what and where it is (instructions for creating a network share can be found in [Appendix 1](#) of this document). At the same time, you can also create and specify a sub-folder(s) under that network share to read your Mail.dat files from. This is useful if you have multiple BT-900's 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 BT-900 can be configured to read data from a different sub-folder in that network share.



Both 900 and 800 series Taggers can operate simultaneously from the same network share.

Another sub-folder within that network share; specifically the 'Logs' sub-folder, is where data will be written to by the BT-900. The 'Logs' sub-folder is different from the sub-folders described above in two ways: 1) A single '\logs' sub-folder should be used for all BT-900's (each log file name includes the BT-900's serial number so there is never a danger of file contention); and 2) Once communication between the BT-900 and the network share is established, the BT-900 will automatically create the 'Logs' sub-folder under that network share the first time a Mailer uses the BT-900 to load a Mail.dat file.



The 'Logs' sub-folder can also be manually created under the network share using Windows Explorer if set-up is required prior to loading a Mail.dat file.

EXAMPLE: MULTIPLE BT-900 SETUP

The following example is specific to setting up multiple Taggers to communicate with a network share. [Appendix 1](#) illustrates how to setup and configure a single Tagger to a network share.

A Mailer has created a share on his network called “TAGGERS”. They have three BT-900’s so the Mailer also creates three sub-folders under the “TAGGERS” network share and names them: Tagger1; Tagger2; and Tagger3. At the same time the Mailer creates the Tagger1, 2 and 3 sub-folders, he or she can also create the ‘Logs’ sub-folder; however, the BT-900 will automatically create the ‘Logs’ sub-folder under that network share when a Mail.dat file is loaded the first time. In this example, there will eventually be a total of four sub-folders under the “TAGGERS” network share.

The sub-folders Tagger1, 2, and 3 are for files that the Mailer wants each of the BT-900s to use. The Logs sub-folder is for the data that the BT-900 is creating for DAT-MAIL.

All three BT-900’s are configured to use the share called “TAGGERS” (refer to [Appendix 1](#)). The first BT-900 will be pointed to the sub-folder “Tagger 1” for its input. The second BT-900 will be pointed to the “Tagger2” sub-folder for its input, and the third BT-900 will be pointed to the sub-folder “Tagger3” for its input.



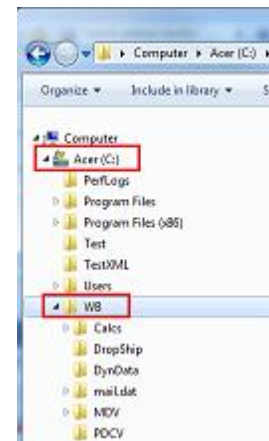
This procedure assumes that a new user account called “Tag900User” has already been created and added to the local machine’s Administrator Group (refer to [Appendix 1](#), specifically [Create a New User Account on the Local PC/Server](#) and [Add the New User Account to the Local Machine Administrator Group](#) for instructions). These two procedures must be completed before proceeding with the instructions below.

Create the TAGGERS Network Share & Sub-Folders Tagger1, 2, and 3

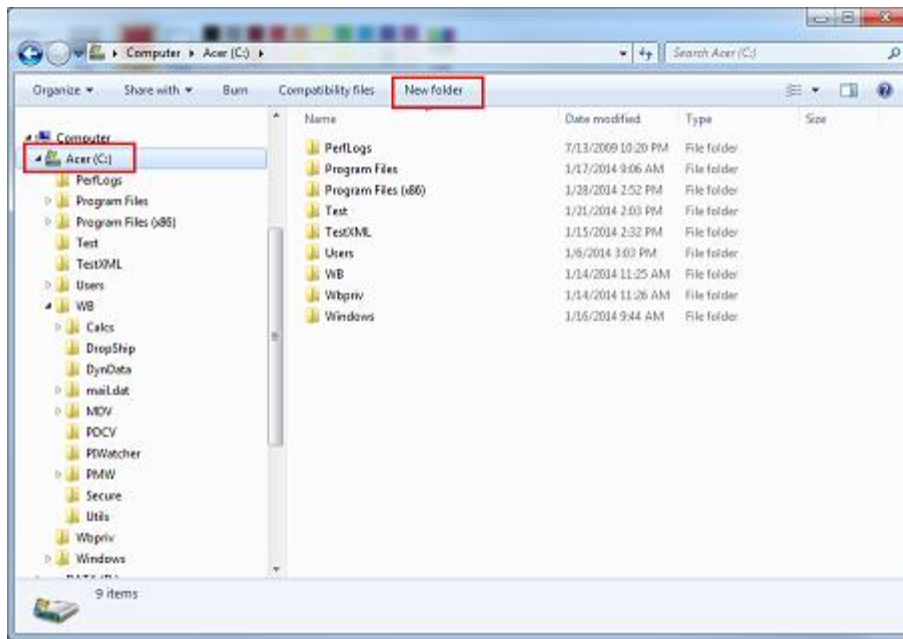
1. On the local PC/Server and , click ‘Start’ and select ‘Computer’;
2. In the Computer window, locate and select the drive that DAT-MAIL is installed on (in this example that drive is ‘c:\');



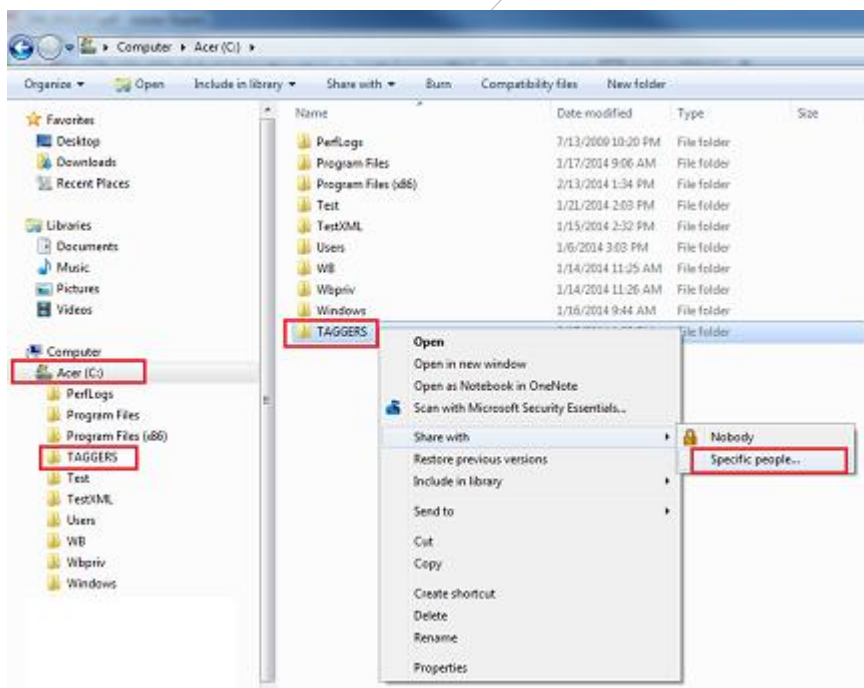
The DAT-MAIL installation will always be identified as a folder named ‘WB’.



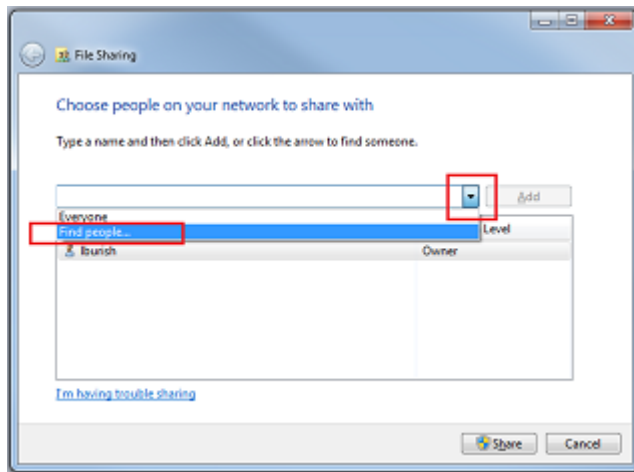
3. In the root of the drive (at 'c:\'), create a new folder by clicking on the **New Folder** button or by right clicking anywhere in the white area of the window and selecting: New -> Folder. The new folder should be created at the root of the drive, not in the 'WB' folder;
4. Name the new folder 'TAGGERS' or any other name that is pertinent to the specific user's DAT-MAIL/Tagger install;



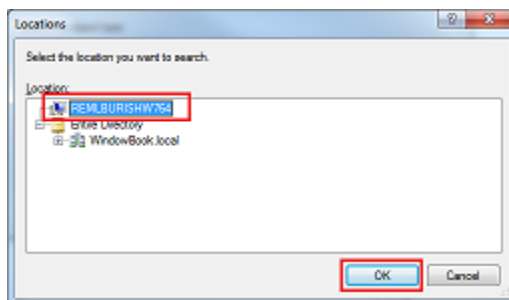
5. Right click on the new folder (**TAGGERS**) and select "Share with..." -> "Specific people...";



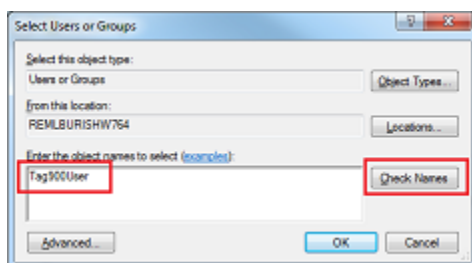
6. A File Sharing window will display. Click the drop-down arrow and select "Find people...";



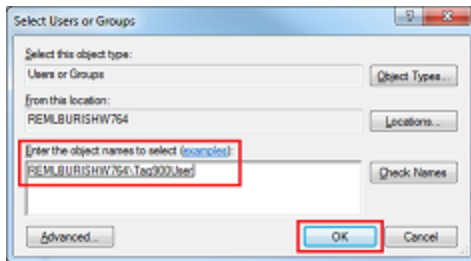
7. A *Select Users or Groups* window will display. Click the **Locations** button;
8. A *Locations* window will display. Select or highlight the local machine name and click the **OK** button;



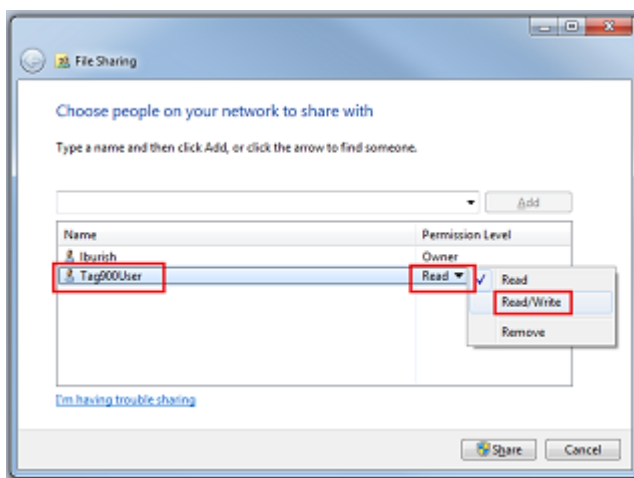
9. You will be returned to the *Select Users or Groups* window. The name of the computer you selected will be displayed. In the 'Enter the object names to select' field, type in the user name "Tag900User" (refer to the [Note](#) found at the beginning of this procedure) and click the **Check Names** button;



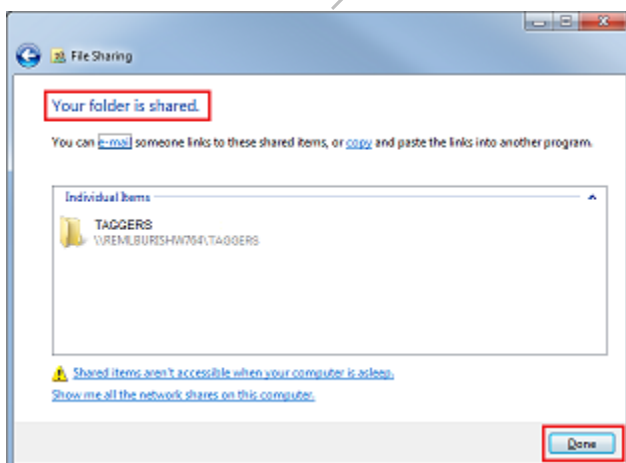
10. When the user account is located, it will display it as: *LocalComputerName\user* or in this example: *REMLBURISHW764\Tag900User*. Click the **OK** button;



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";

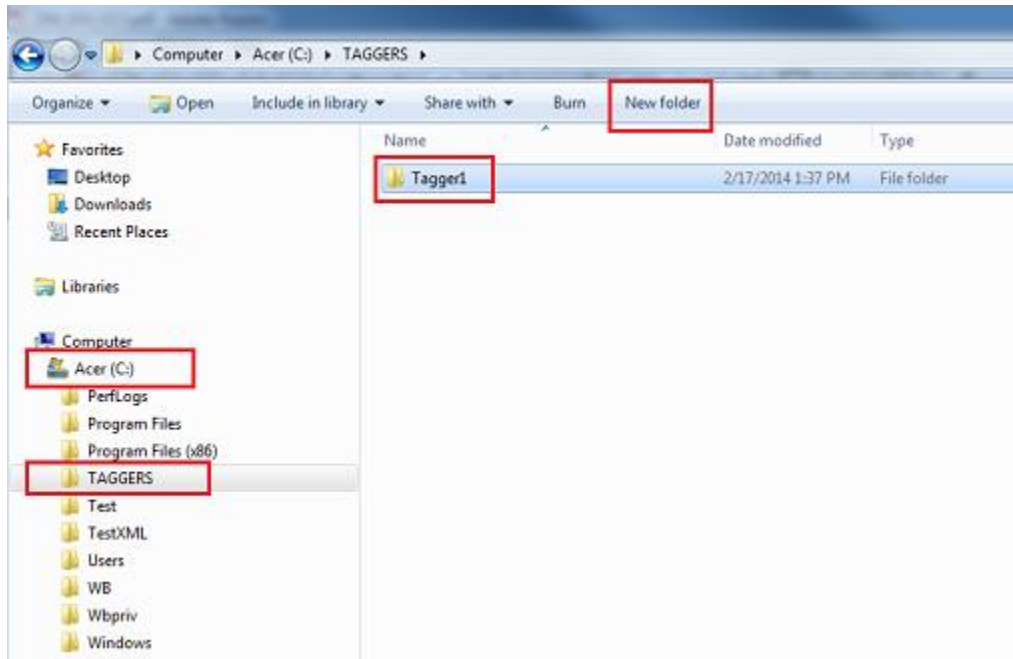


12. Click the **Share** button. You will be returned to the *File Sharing* window which will confirm that your folder (i.e. **TAGGERS**) has been shared; and



13. Click the **Done** button;

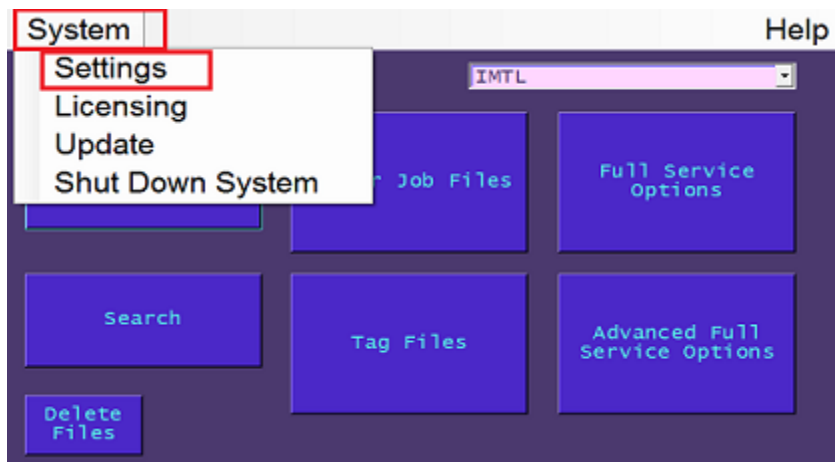
14. Select the TAGGERS folder and click the **New Folder** button to create a sub-folder under TAGGERS;
15. Name the new sub-folder “Tagger1”;



16. Repeat steps 14 and 15 to create two more sub-folders under TAGGER, naming them “Tagger2”, and “Tagger3”.

Configure Each BT-900 to Its Own Sub-folder

1. From the *Main Menu* touch screen on the first BT-900, gently tap or touch ‘System’ located in the top-line menu bar, and then the ‘Settings’ menu option;



- The *Settings* touch screen will display. Gently tap or touch the **Additional Settings** touch button;

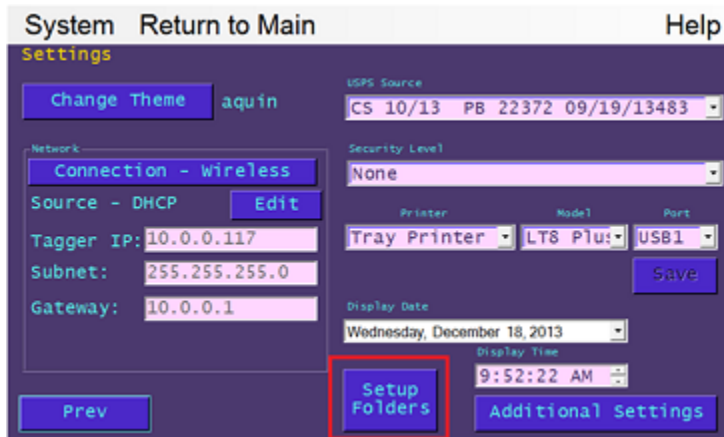
The screenshot shows the 'Settings' screen with a dark blue background. At the top, there are three tabs: 'System', 'Return to Main', and 'Help'. Below the tabs, the word 'Settings' is displayed in yellow. The screen is divided into several sections. On the left, there is a 'Change Theme' button with the text 'aquin' next to it. Below this is a 'Network' section with a 'Connection - Wireless' button, a 'Source - DHCP' button, and an 'Edit' button. The 'Tagger IP' is set to '10.0.0.117', 'Subnet' is '255.255.255.0', and 'Gateway' is '10.0.0.1'. On the right, there is a 'USPS Source' dropdown menu showing 'CS 10/13 PB 22372 09/19/13483', a 'Security Level' dropdown menu showing 'None', and a 'Printer' section with 'Tray Printer', 'Model' 'LTS Plus', and 'Port' 'USB1'. There is a 'Save' button next to the printer settings. Below the printer settings, there is a 'Display Date' dropdown menu showing 'Wednesday, December 18, 2013' and a 'Display Time' dropdown menu showing '9:52:22 AM'. At the bottom, there are three buttons: 'Prev', 'Setup Folders', and 'Additional Settings'. The 'Additional Settings' button is highlighted with a red rectangle.

- The *Additional Settings* screen will display. Gently touch or tap the **Sorting Software** touch button until a value of 'DATMAIL' is displayed (the two available settings are 'DATMAIL' and 'None');

The screenshot shows the 'Additional Settings' screen with a dark blue background. At the top, there are three tabs: 'System', 'Return to Main', and 'Help'. Below the tabs, the word 'Additional Settings' is displayed in yellow. The screen is divided into several sections. On the left, there is a 'Ready to Pay (Disabled)' button. Below this is a 'Tag Serial Parameters' section with an 'Edit' button, a table with columns 'Min', 'Max', and 'Current', and a 'Save' button. The table contains the values '1', '99999', and '5' respectively. On the right, there is a 'Select Start of Day Adjustment:' section with a dropdown menu showing '0' and a 'Store' button. Below the 'Store' button, there is a 'Single' section with an 'OnDemand Print Qty' button. At the bottom, there is a 'Prev' button. The 'Sorting Software' button is highlighted with a red rectangle.

- Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen;

5. Gently tap or touch the **Setup Folders** touch button;;



6. The *Server Share* touch screen will display. Gently tap or touch anywhere in the blank, 'Shared Server IP' field so a blinking cursor appears in the field and enter the IP address of the local PC/Server the newly created Windows folder is located on by using the physical keypad locate on the front of the BT-900;



7. Gently tap or touch the **Ping** touch button to confirm communication with the local PC/Server is established (a confirmation message as to whether or not communication was successful will display in the 'Status' field);
8. Gently tap or touch in the empty 'Shared Folder Name' field. An alpha-numeric key pad will display on the touch screen. Enter the name of the Windows Shared folder created under [Create a folder on the Local PC/Server & Share It with the New User Account](#) above (i.e. "TAGGERS") (see the screen image following [Step 16](#) below for an example);



Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.

9. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the *Server Share* screen will display with "TAGGERS" populating the 'Shared Folder Name' field;
10. Enter the name of the sub-folder for specific to this particular BT-900. For this example, enter "Tagger1" in the 'Subfolder' field by gently tapping or touching anywhere in the 'Subfolder' field. An alpha-numeric keypad will display. Enter "Tagger1";
11. Gently touch or tap the **Enter** touch key on the key pad when finished. The key pad will close and the *Server Share* touch screen will display with "Tagger1" populating the 'Subfolder' field (see the screen image following [Step 16](#) below for an example);
12. Enter the Tagger User ID by gently tapping or touching the 'Tagger User ID' field. An alpha-numeric key pad will display. Enter "Tag900User" which was the User Name given to the new user account created under [Create a New User Account on the Local PC/Server](#) above (specifically, [step 3](#));
13. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the *Server Share* screen will display with "Tag900User" populating the 'Tagger User ID' field (see the screen image following [Step 16](#) below for an example);
14. Enter the Tagger Password by gently typing or touching the 'Tagger Password' field. An alpha-numeric key pad will display;



The 'Tagger Password' field may already be populated with a pre-existing password displayed as asterisks ''. You will need to remove the existing password and enter the correct one, the instructions for which immediately follow.*

15. Tap or touch the **Back** touch key on the key pad as many times as necessary to erase the pre-existing password information from the field; then, enter the correct password as stipulated above in [Create a New User Account on the Local PC/Server](#) above (specifically, [step 4](#)), which is "pw1234!";



Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.

16. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "pw1234!" populating the 'Tagger Password' field;

17. Gently tap or touch the **Test Settings** touch button. The 'Status' window will populate with a 'Succeed' confirmation message;



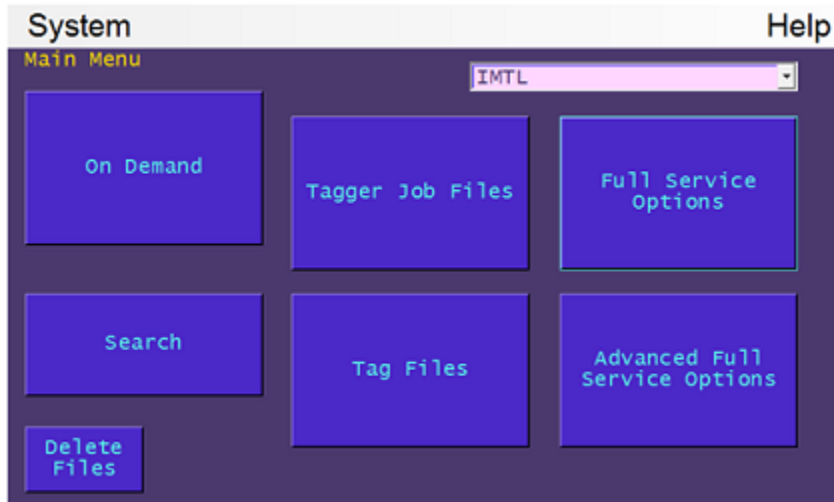
If a 'Failed' message displays in the 'Status' window, confirm the correct spelling and correct case was used when entering the Shared Folder Name, Tagger User ID, and Tagger Password.

18. Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen;
19. Gently tap or touch the 'Return to Main' menu option from the top-line menu bar to display the *Main Menu* touch screen. The set-up is complete.

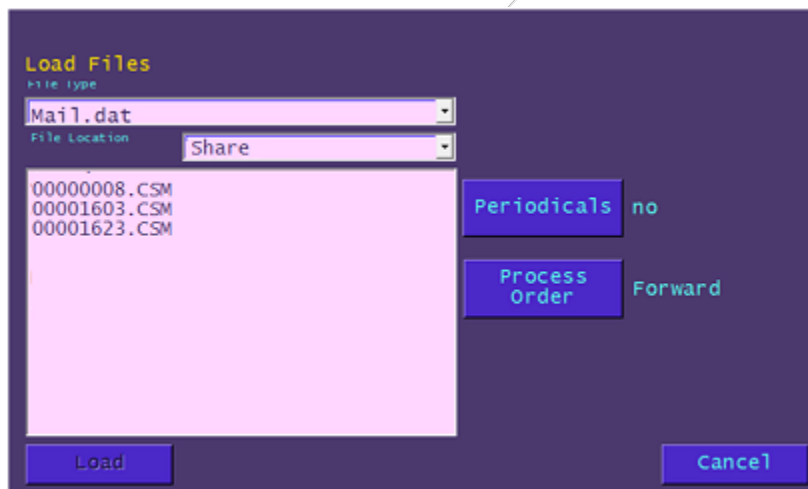
SET THE LOG FILE LOCATION

Once the BT-900's communication configuration is complete, the next step is to tell the BT-900 where the log files are to be stored. To do so, perform the following:

1. From the BT-900's *Main Menu* touch screen, gently tap or touch the **Advanced Full Service Options** touch button;



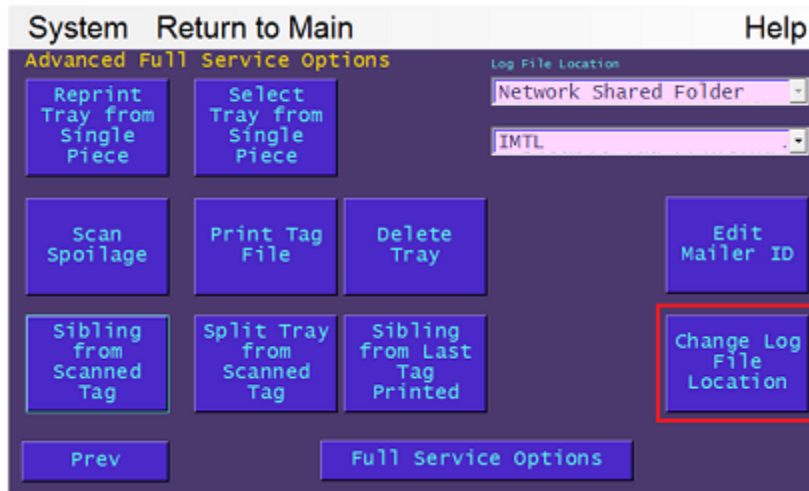
2. The *Load Files* touch screen will display. Based on the settings previously specified, the BT-900 should automatically default to the list of available Mail.dat files (in this example, the File Type is 'Mail.dat', and the File Location is 'Share'). If it does not, select these options;



If the 'Logs' folder was previously created under the network share the BT-900 is communicating with (already exists), it too would display along with the list of available Mail.dat files.

3. Identify the file you want to load from the list and gently tap or touch the file name to highlight it;

4. Gently tap or touch the **Load** touch button. The selected file will load and the *Advanced Full Service Options* touch screen will display;
5. If the 'Log file Location' field does not display the correct location (in this example, the log file location should be 'Network Shared Folder', gently tap or press the **Change Log File Location** touch button;



6. Gently tap or touch anywhere in the 'Log File Location' field and select the 'Network Shared Folder' option from the list. The log file location is now set for the BT-900 and will remain at this setting unless physically changed by the user.

i If the Log File Location was already set to "Network Shared Folder", a 'Logs' folder will automatically be created under the network share folder the BT-900 is communicating with when the Load touch button was tapped (see step 4 above).

If the Log File Location had to be changed to "Network Shared Folder" a 'Logs' folder will be automatically created under the network share folder the BT-900 is communicating with when you perform a procedure that generates a log file.

i Be aware that in the initial (first) release of the BT-900 if the Log File Location is set to "USB Flash Disc" and a USB flash drive has not been plugged into the BT-900, the BT-900 will not notify the user that they need to insert a USB flash drive. This is a known issue that is to be addressed in a future release/update by Whittier.

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, along with how to generate sibling tags. To do so, the BT-900 must be configured to generate IMTL tray tags and also enter a Mailer ID (MID).

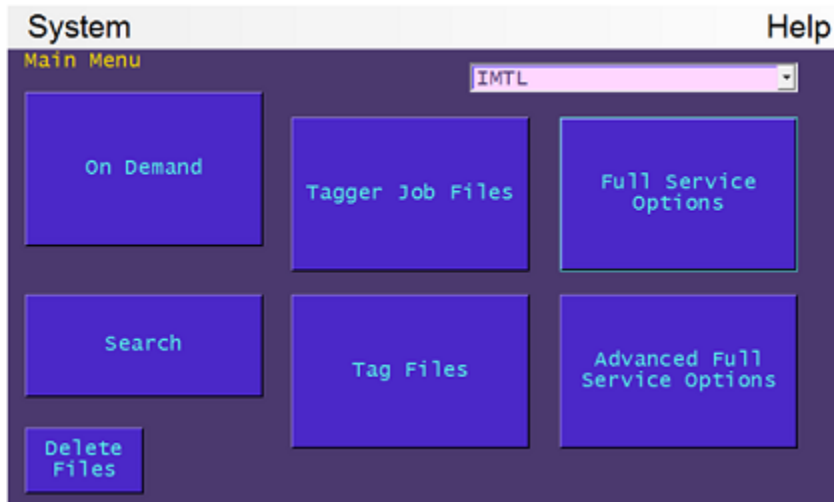
i Window Book recommends a special MID is used just for this purpose. The MID needs to be one that is not otherwise used to generate Intelligent Mail Tray barcodes in any other program. This way, the barcodes

generated by the BT-900 will not be duplicated by any other program. The USPS can provide extra 9 digit MIDs upon request and no matter how many tray tags are printed, there will always be plenty of serial numbers available (even with 9-digit MIDs) to meet the USPS's 45-day uniqueness window.

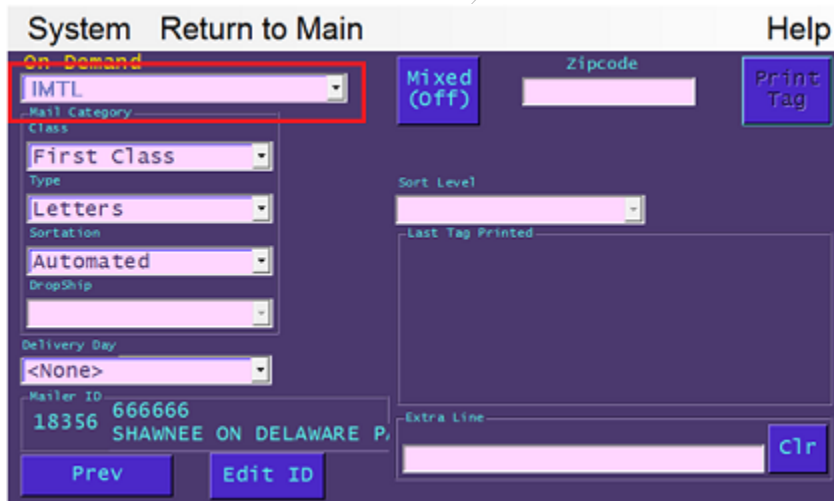
MAILER ID SETUP

To set up the Mailer ID, perform the following:

1. From the BT-900's *Main Menu* touch screen, gently tap the **On Demand** touch button;



2. The *On Demand* touch screen will display. Lightly tap or touch anywhere on the tray tag type field which is located directly below the 'On Demand' label and select 'IMTL' from the list;



3. Specify your mail 'Class', 'Type', and 'Sortation' method used by lightly tapping or touching each of the respective fields and selecting one of the options from the drop down menu that will display;

4. Gently touch or tap the **Edit ID** button to add or edit the Mailer ID information;

The screenshot shows the 'System' screen with various configuration options. The 'Mailer ID' field is highlighted with a red box, containing the text '18356' and '666666'. The 'Edit ID' button is also highlighted with a red box. Other visible fields include 'IMTL', 'Mixed (off)', 'Zipcode', 'Print Tag', 'Mail Category', 'Class', 'First Class', 'Type', 'Letters', 'Sortation', 'Automated', 'DropShip', 'Delivery Day', '<None>', 'Sort Level', 'Last Tag Printed', 'Extra Line', 'Prev', and 'Clr'.

5. The *Mailer Information* touch screen will display. Gently touch or tap in the 'Mailer ID' field to enter a Mailer ID or edit any existing data;

The screenshot shows the 'Mailer Information' screen. It has three input fields: 'MailerID' with the value '666666', 'Zipcode' with the value '51551', and 'originLine' with the value 'MALVERN IA'. There is a 'Saved' button and a 'Prev' button at the bottom.

6. If a Mailer ID already exists and you want to edit it, tap in the area of the field that is empty (far right) so the cursor is positioned at the end of the displayed text;
7. Press the **Del** key found on the front of the BT-900 until the field is empty;
8. Using the same keypad located on the front of the BT-900, enter one of your company's six or nine digit Mailer IDs.



Window Book recommends that you use a Mailer ID that is not usually used to generate tray tags to avoid any possible conflict with other data sources.

9. If the Zip code needs editing, perform the same actions for the Zip code;

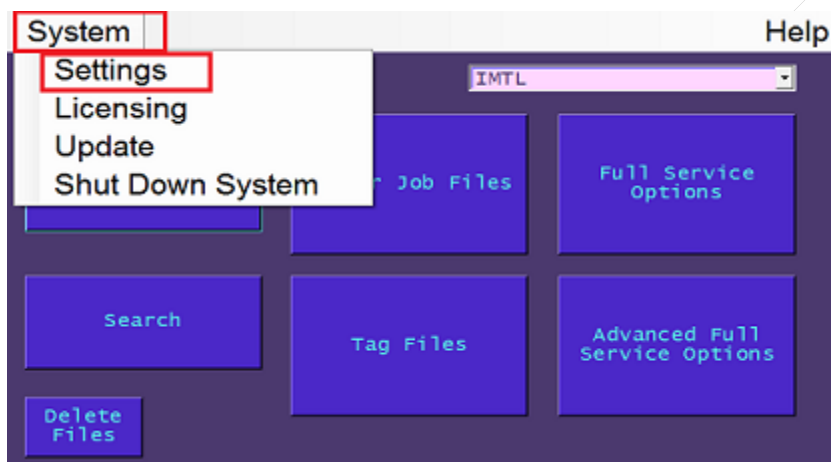
10. Gently tap or touch the **Saved** button on the *Mailer Information* touch screen when done;
11. Gently tap or touch the 'Return to Main' menu option located in the top-line menu bar of the screen to display the BT-900's *Main Menu* touch screen.

Setting Up the Print Logging

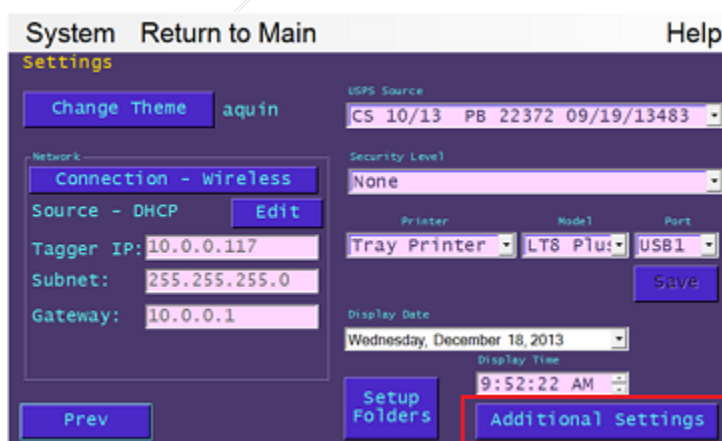
When this feature is enabled, the BT-900 will log all tray tags you are printing, whether it be by printing "inline" with production or by printing tags after scanning a pallet placard. DAT-MAIL will automatically mark these trays as "ready to pay" for PostalOne!. When you go to generate statements in 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 print logging on the BT-900, perform the following:

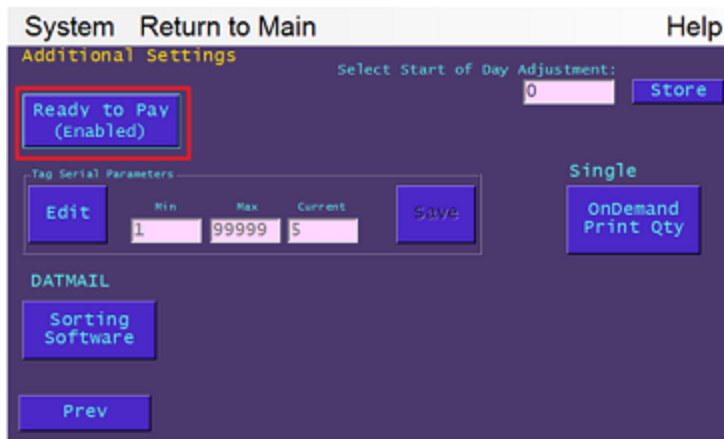
1. From the BT-900, gently tap or touch the 'System' menu option from the top-line menu, and then touch or tap the 'Settings' menu option;



2. The *Settings* touch screen will display. Gently touch or tap the **Additional Settings** touch button;



3. The Additional Settings touch screen will display. Gently tap or touch the **Ready to Pay** touch button until the same touch button displays “Enabled”.



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;

by Job Number by Import Date by Last Accessed by In-Home Delivery Date by First Mail Date by Job ID by Historical Job ID by Job Name by Client

Enter data to search for: ■ - Mailer Approved ■ - USPS Verified

Job Number	Job Name	Rev.	Stmt Status	Tag Print Status	Pallets	Trays/Sacks	Class	Category	Total Pieces	Pending Spoils
00004734_Local	00004734_Local	1	Open	N/P	N/P	N/P	First Class	Letter	2	2
00004736_Local	00004736_Local	1	Open	N/P	N/P	N/P	First Class	Letter	2	2
00004753	00004753	1	Open	N/P	N/P	N/P	Standard	Letter	131,316	131,316
00004753_Local	00004753_Local	1	Open	N/P	N/P	N/P	Standard	Letter	131,316	131,316

View Validation Log Approved Archive Delete Validate View Releases View Import Log **Select**

Mailing Info Statements

Job Name: 00004734_Local Job ID: 00000006 Drop Shipped: No
 Job Number: 00004734_Local Origin Zip: 02139
 Class: First Class Total No. of Pieces: 2
 Revision No: 1 Lowest Pz. Wgt.: 0.1195
 Highest Pz. Wgt.: 0.1195

Restore to Original Container Types Present:

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

File View Related Reports Utilities Help

AWAM Service is inactive

JOB ID: 00000006 Presentation Category: P - Conventional Presort Total Pieces: 2
 Job Number: 00004734_Local IM Basic/Other Pieces Mailed: 0
 Job Name: 00004734_Local First Class Letter Pieces Spoiled: 0
 Historical Job ID: 00004734 Status: Open Remaining: 2 100.0%

Mailing Date: 02/18/2016 - 04/22/2016 USPS Promotion / Fee: Incentive: None
 Piece Weight(lbs): 0.1195 Fee: None Content: None

eDoc Sender CRID HDR: 5059146
 SEG: 2442173

Trays, Sacks & Pallets Trays

eInduction Pallet Count: 0

Destination Facility Types

Type	Pieces
Origin	2

Check for Pending Actions
 Downgrade to Basic Service
 Import Siblings
 Scan IMTL Codes
Export To Tagger
 Planalyzer
 Apply Mass Update
 Convert Job To Logical
 Palletize

By / For Mail Preparer MID: 901264001 Not linked to Mailing Agent record.
 Mail Owner MID: 901264001 Not linked to Client record.
 Postage Payment Permit Permit: 123456 BOSTON MA 02205-9651

Local Permit Number: Mail Owner: Type: None

Misc Info Non-Profit Auth No.: Customer Ref ID: Fed Agency Cost Cd:

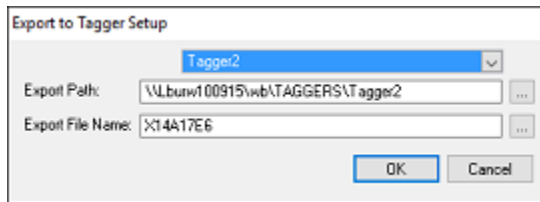
Move Update Method: NCOA
 Address Hygiene Dates Auto Coding Date: 10/21/2015
 CRRT Coding Date: 10/21/2015
 CRRT Seq. Date: / /
 Verification (Origin) Facility: Window Book, Inc. 02205-9651

Other Mail.dat Files Other Views Reports

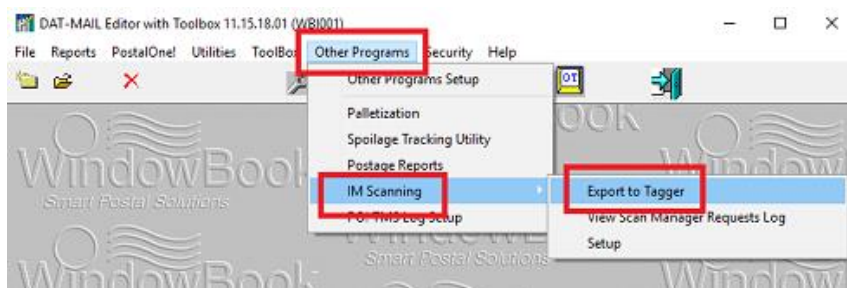
Validation Info Statement Generate PostalOne! Releases View Statements

Reference Guide

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.



i 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 BT-900, the barcode for the new tray is recorded along with the barcode from the tray that overflowed and 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.

i Do not attempt to import the multi-job file generated by the Tagger by using the "Import Siblings" button located in the DAT-MAIL's Advanced Navigator screen. 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-900 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-900, all changes will be added to the Mail.dat files at that time.

To determine if there are any pending BT-900 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 here.

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 5](#) for further instructions.

Using the BT-900 to Generate Sibling Tags

“What is a Sibling Tray, Sack or Pallet?”

When the piece attributes used to define a pre-sort are not exactly right, the Mailer’s pre-sort program may indicate that more pieces of mail will fit into a tray than is actually the case. Since many pre-sorts 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.

Reference Guide

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 BT-900 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, or in this case two trays.

MAIL ACCEPTANCE

Today, PostalOne! does not show siblings on its statements due to a defect (ETR-49516) that should be corrected somewhere in the near future. 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 Farrington 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 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.

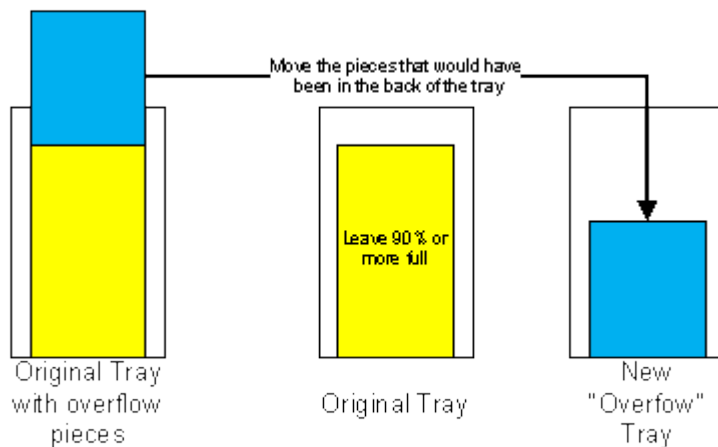
- **Advantages:** You can use third party palletization services and DSMS consolidators. New trays will appear on the USPS qualification report, and they will appear on PostalOne! Postage Statements even before the ETR is corrected so in most cases no supplemental documentation will be needed.

- **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.



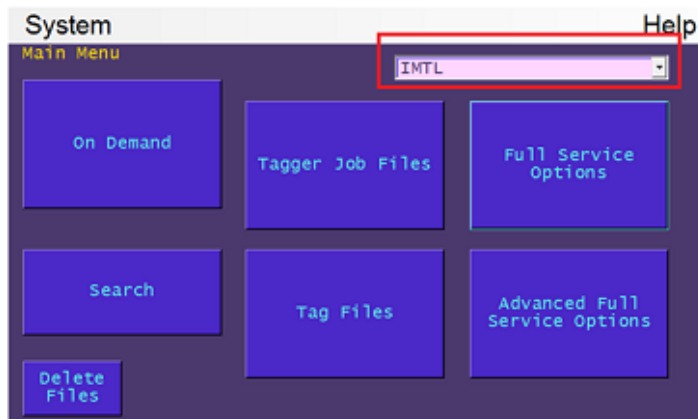
DO NOT MOVE THE PIECES THAT ARE IN THE FRONT OF THE ORIGINAL TRAY TO THE NEW TRAY WHEN DOING TRAY SPLITTING!



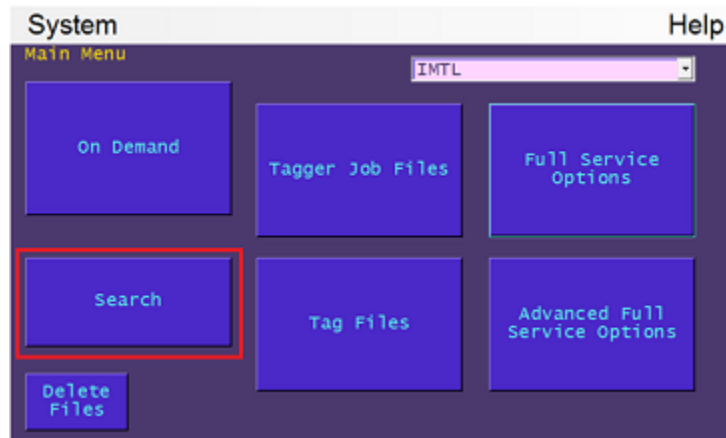
Creating Sibling Trays and Pallet Tags with the BT-900

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:

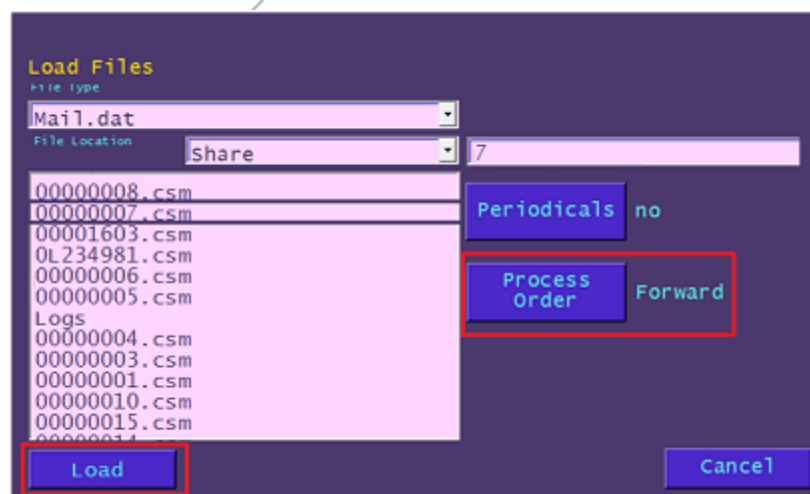
1. From the BT-900's *Main Menu* touch screen, specify what type of tag printing you would like to do by gently tapping or touching the menu list field and selecting 'IMTL';



2. With 'IMTL' selected, you can go directly to the list of available files and select it or you can Search for the specific Mail.dat file.
3. To go directly to the list of available files, continue to step 3 below; or
4. To Search for a specific file, proceed to step 2.a:
5. To Search for a specific Mail.dat file, click the Search touch button. gently tap or touch the **Tag Files** touch button;

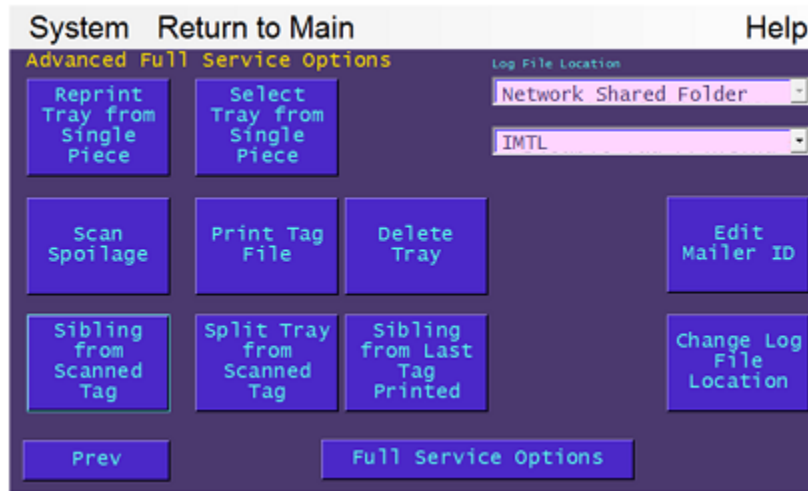


6. A searchable Load Files touch screen will display. You can either select the job from the list by gently touching or tapping it, or you can touch or tap the search field and enter the numeric searchable criteria using the keypad on the front of the BT-900. The search function will highlight an exact match or list multiple finds. Gently touch or tap the file to select it.
7. At this time, for those doing "inline" printing of the tray tags: If the jobs are produced in reverse order and this is not reflected in the Mail.dat file, the order of the tag printing can be changed by tapping or touching the **Process Order** touch button so that 'Forward' is changed to 'Reverse';



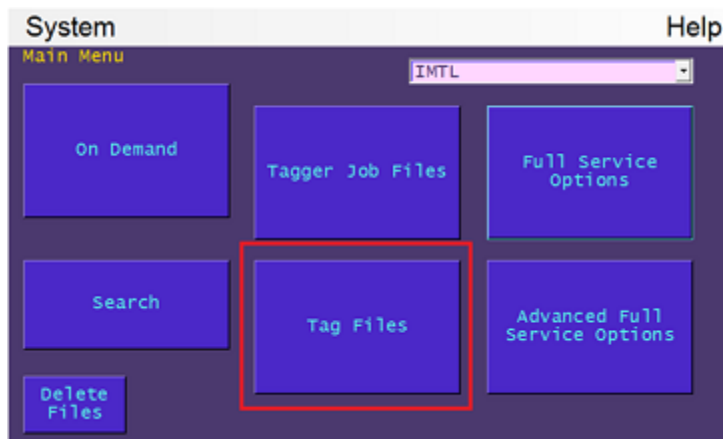
8. Click the **Load** touch button;
9. The *Advanced Full Service Options* touch screen will display.

From this touch 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.

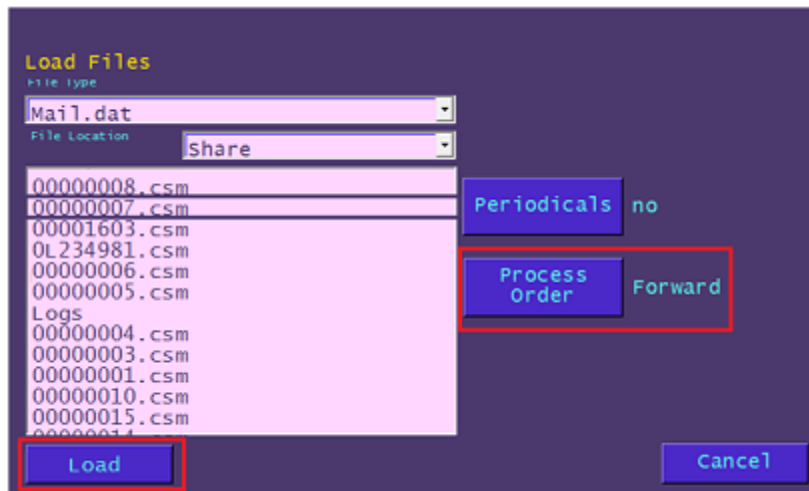


If a prior action is required before attempting one of the functions listed on the Advanced Full Service Options touch screen, it will be noted on the button itself.

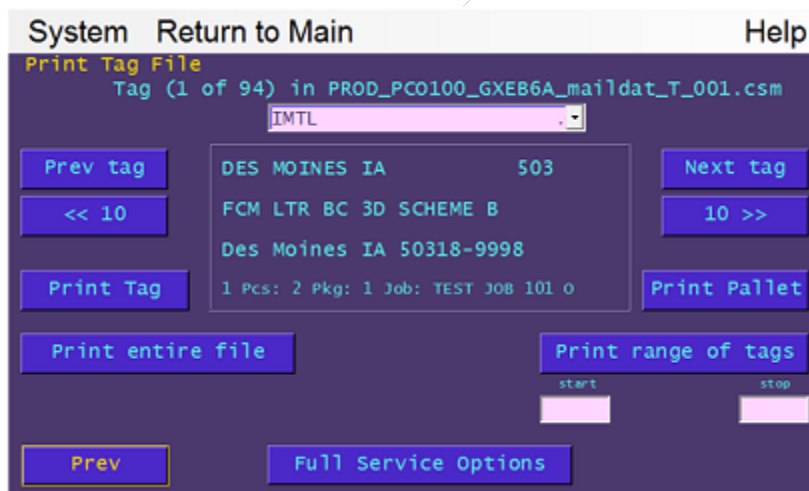
10. To perform some useful functions like batch printing your tray tags by container grouping or pallet number, or even printing all of the tray tags for a pallet by scanning the pallet placard (this feature provides the labor and time savings of using the one-up Tagger tray tags without being impacted 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), gently touch or tap the **Full Service Options** touch button.
11. Proceed to [step 6](#) below...
12. From the Main Menu touch screen with 'IMTL' selected, gently touch or tap the **Tag Files** touch button;



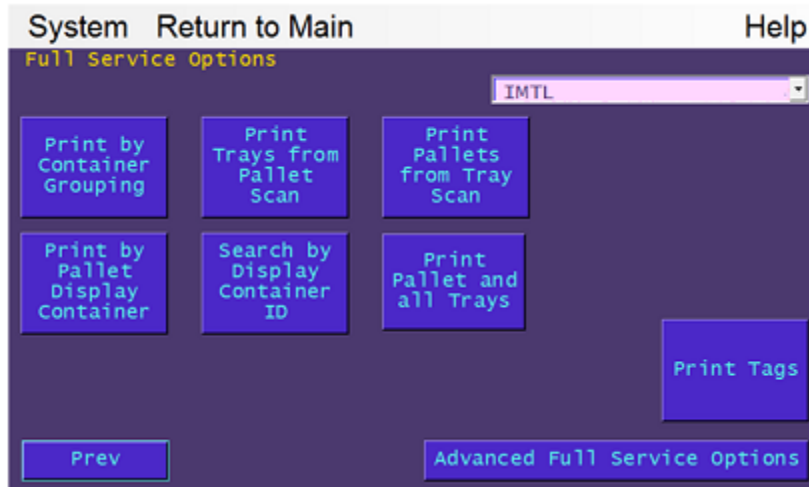
13. The *Load Files* touch screen will display. Select 'Mail.dat' for the File Type, and select where the file is located (in this example, the file is located on a network share, so 'Share' is selected);
14. Gently tap or touch the desired file from the list to highlight/select it.
15. At this time, for those doing "inline" printing of the tray tags: If the jobs are produced in reverse order and this is not reflected in the Mail.dat file, the order of the tag printing can be changed by taping or touching the **Process Order** touch button so that 'Forward' is changed to 'Reverse'.
16. Click the **Load** touch button;



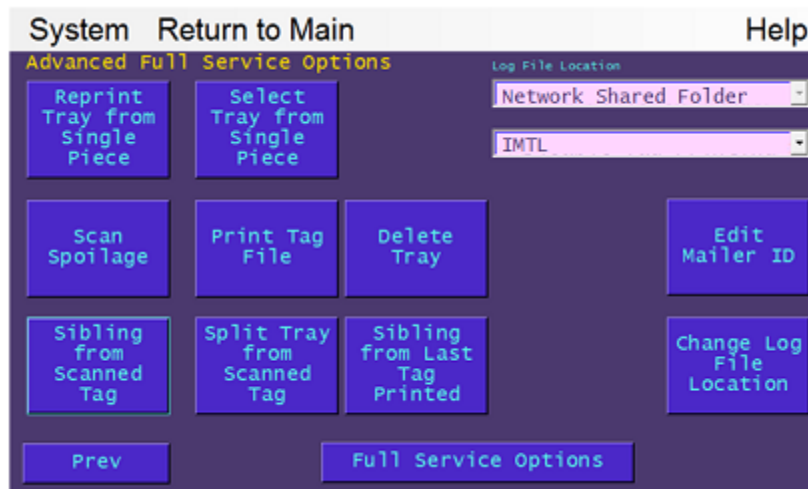
17. The *Print Tag File* touch screen will display. You can print all, a range, or a single tag from this touch screen;



18. To 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), gently touch or tap the **Full Service Options** touch button;



19. To perform functions specific to DAT-MAIL users such as 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, gently touch or tap the **Advanced Full Service Options** touch button to display the *Advanced Full Service Options* touch screen.

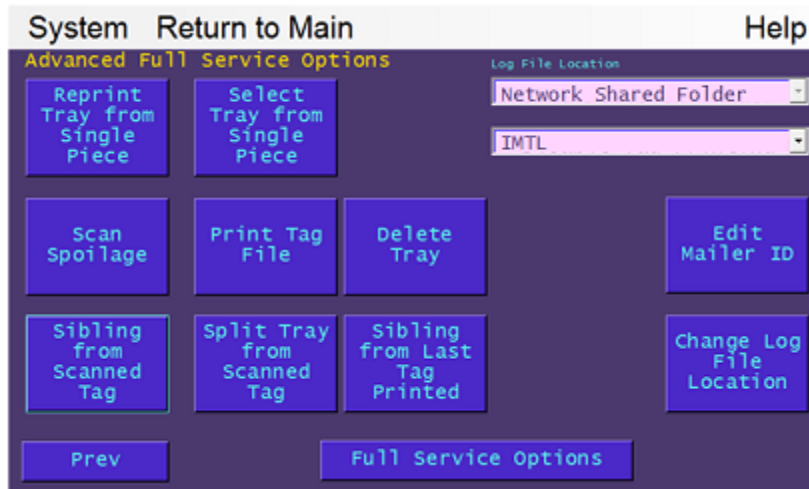


If a prior action is required before attempting one of the functions listed on the Advanced Full Service Options touch screen, it will be noted on the button itself.

Printing Sibling Tags

To print sibling tags, perform the following:

1. After a Mail.dat file has been loaded, from the Advanced Full Service Options touch screen, gently touch or tap the **Sibling From Scanned Tag** touch button in order to scan the tray that has 'overflowed', which the new sibling tray tag will be associated with;



2. The Scan Single Piece to 2D Barcode touch screen will display, which prompts you to scan the tray tag;
3. 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;

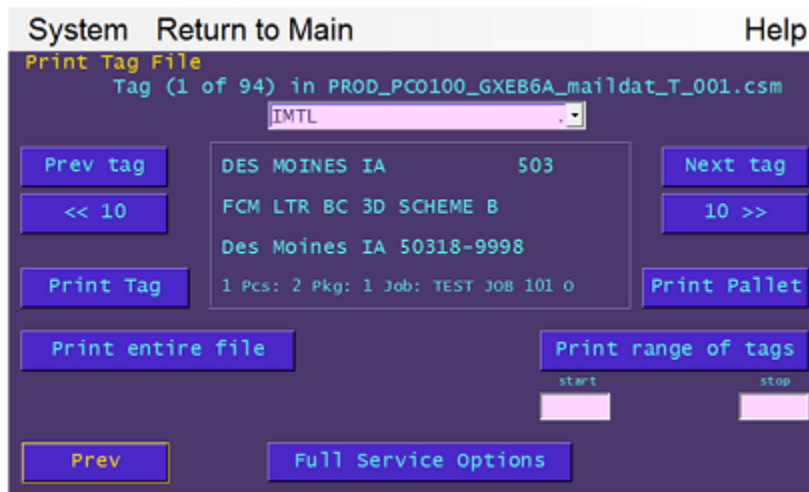


Window Book does not recommend the use of trigger-less scanners since they can decode tray tags at times that the BT-900 is not on the scan barcode screen. This would be the same as pressing 24 keys on the the BT-900 when in other menus, resulting in unpredictable and unwanted actions like re-printing tags for the entire job.

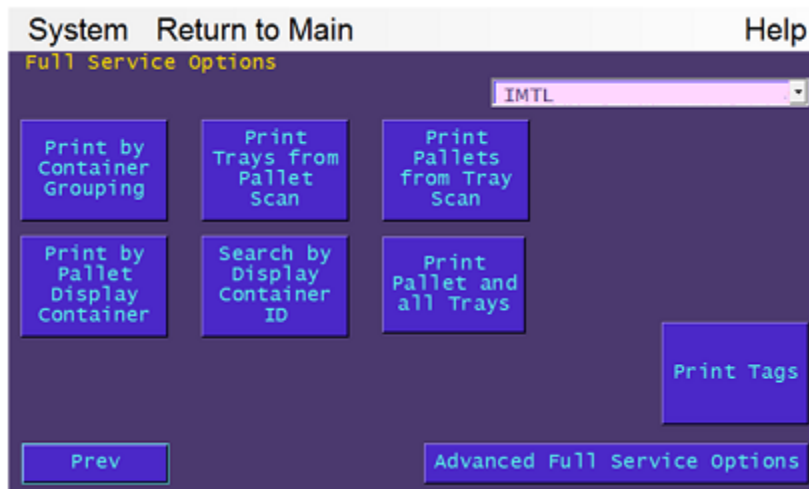
4. Place the new tag in the sleeve of the new overflow tray.

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 option of "Sibling from Last Tag Printed". No scanner is needed in this case.

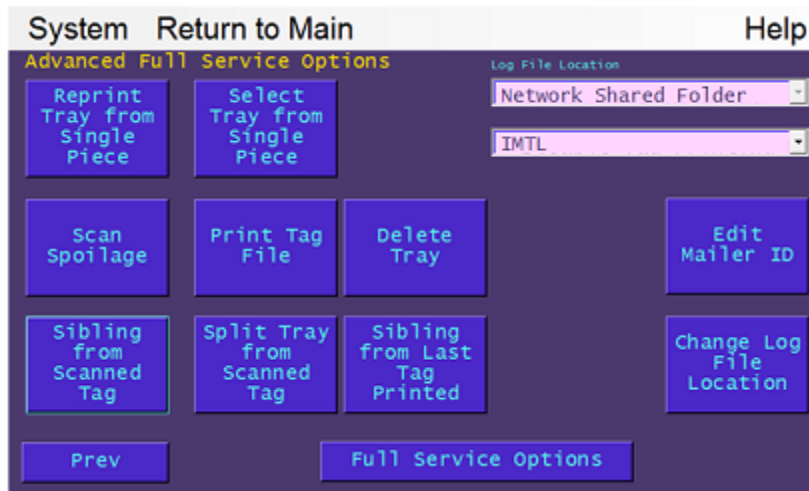
- When using in-line tag printing, gently touch or tap the **Print Tag** touch button on the *Print Tag File* touch screen;



- To print the sibling, gently touch or tap the **Full Service Options** touch button;
- The *Full Service Options* touch screen will display. Gently touch or tap the **Advanced Full Service Options** touch button;



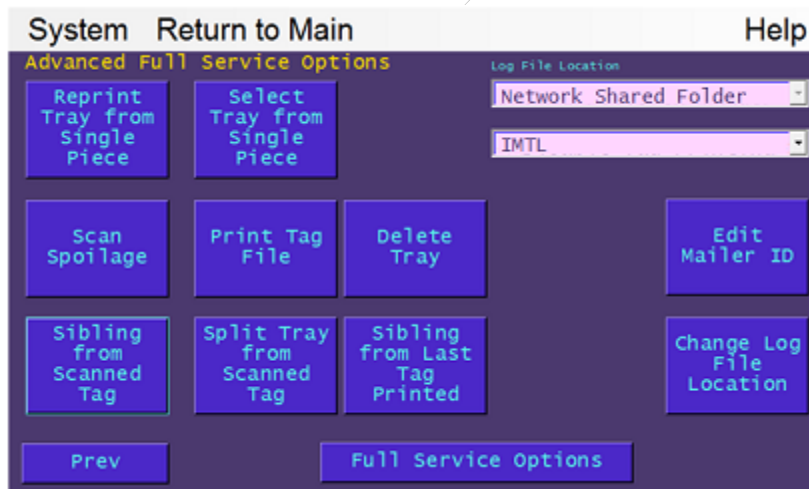
8. The *Advanced Full Service Options* touch screen will display. Gently touch or tap the **Sibling from Last Tag Printed** touch button.



Splitting a Tray

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

1. Load a Mail.dat file (refer to [Retrieving a Mail.dat File for a Job](#) in this document);
2. Display the Advanced Full Service Options touch screen;
3. Gently touch or tap the **Split Tray from Scanned Tag** touch button;



4. Scan the tag of the tray that you are splitting; and
5. 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.

Re-printing 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 BT-900's *Advanced Full Service Options* touch screen and gently tap or touch the **Reprint Tray from Single Piece** touch button. 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 lines.

You can easily find the first tray in the production run by simply tapping or touching the **Select Tray from Single Piece** touch button located on the *Advanced Full Service Options* touch screen and using your handheld imager/scanner to scan the IMb on the first mail piece produced.

The BT-900's *Print Tag File* touch screen will display along with that tray. Just touch or tap the **Print Tag** touch button 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 tapping or touching the **Delete Tray** touch button located on the *Advanced Full Service Options* touch screen in the BT-900. 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 cannot 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 BT-900 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. Users 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 BT-900's "On Demand" Mode

This method requires no interface between the BT-900 and DAT-MAIL. The mailer connects a USB scanner to the computer that runs DAT-MAIL and scans sibling tags previously generated by the BT-900'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 BT-900. 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 BT-900 or are scanning the tags into the wrong job.

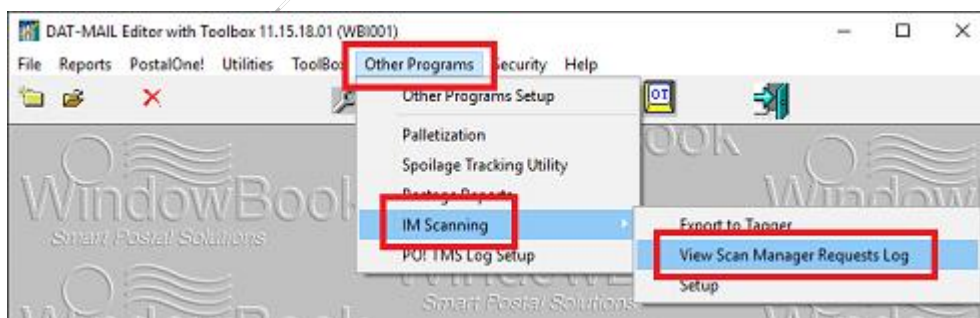
FILE MAINTENANCE

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.

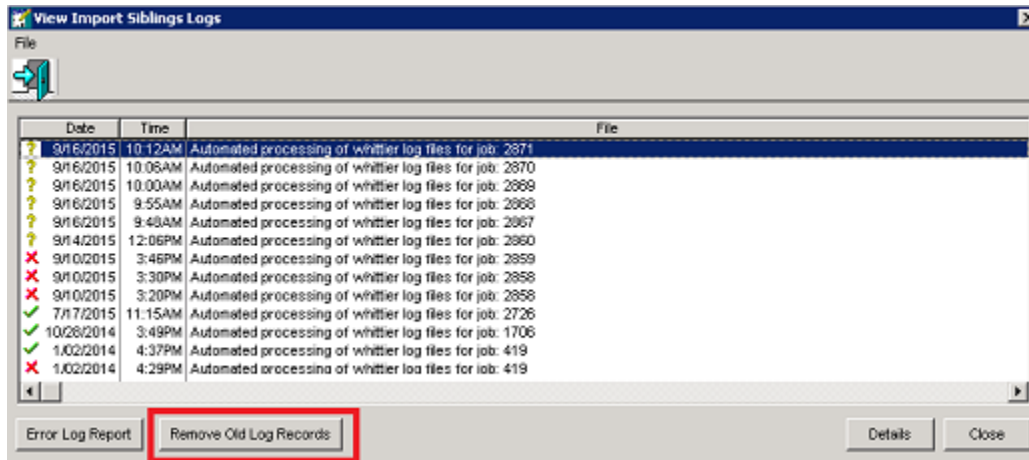
Window Book has made both functions very easy.

Remove Old Log Records

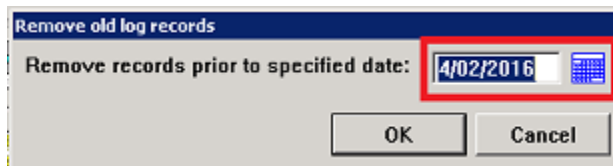
To remove or purge the log files, from DAT-MAIL'S main screen, select 'Other Programs' > 'IM Scanning' > 'View Scan Manager Requests Log'.



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.



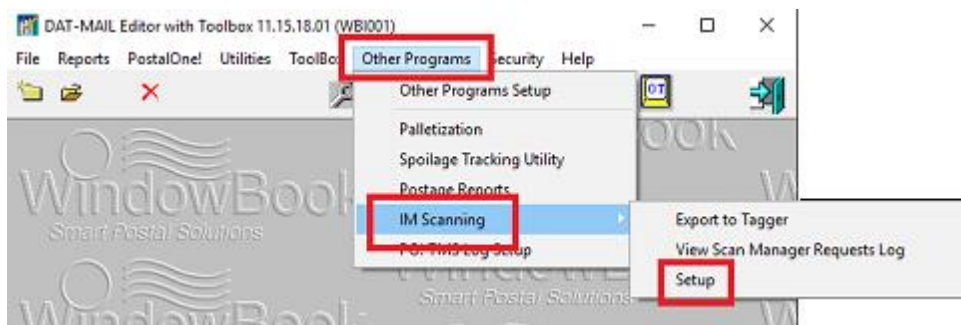
Log records older than the date entered/selected will be deleted or purged when the **OK** button is clicked (clicking the **Cancel** button will abort the delete or purge process). The date used will reference the date the file was imported into DAT-MAIL, not the date of mailing.



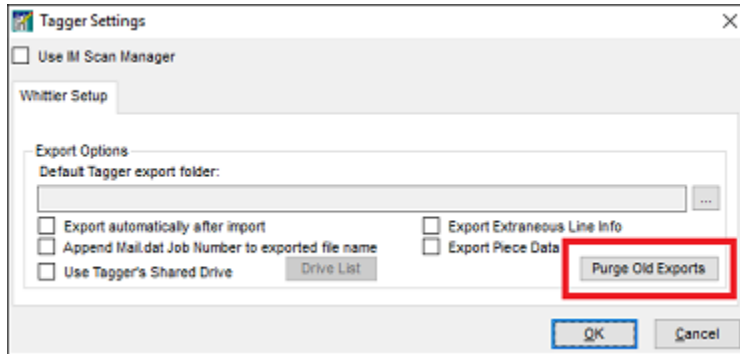
Be aware that once records or items are purged, they cannot be restored.

Remove Old Tagger Files

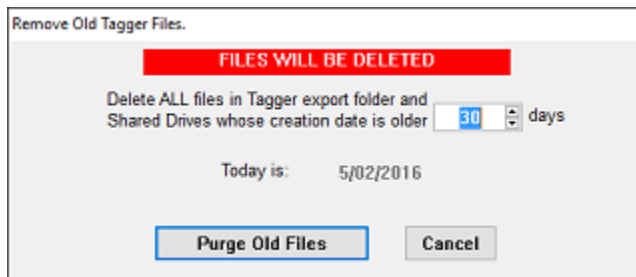
To remove or purge exported Tagger files, from DAT-MAIL'S main screen, select 'Other Programs' > 'IM Scanning' > 'Setup'.



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.

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APPENDIX 1

NETWORK CONNECTION SET UP & CONFIGURATION

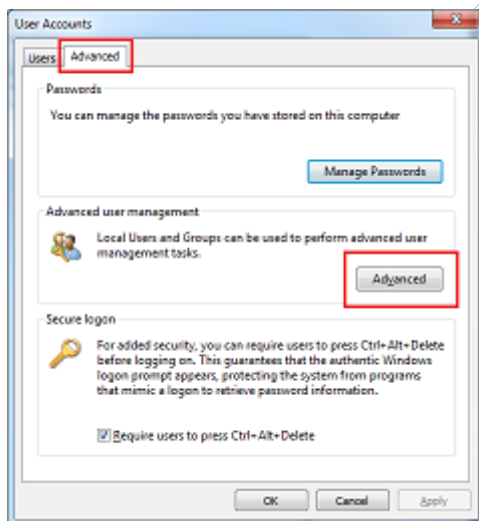
There are 5 steps to setting up a network share and being able to connect to it with the BT-900. They are: 1) Create a User Account on the Local PC/Server; 2) Add New User Account to the Local Machine Administrator Group; 3) Create a Folder on the PC/Server & Share it with the New User Account; 4) Setup the Network Configuration on the BT-900; and 5) Configure the Windows Folder Share Settings on the Tagger.

Create a New User Account on the Local PC/Server

For illustration purposes in this Appendix, a user account called "Tag900User" with a password of "pw1234!" is created and used.

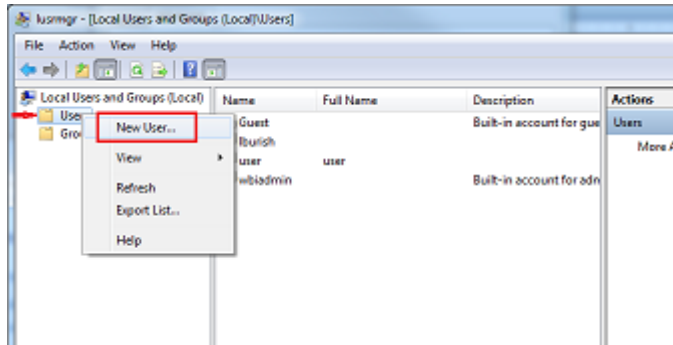
i *The following set up instructions were performed on a PC/Server with a Windows 7 operating system (OS). Screen layouts and menu options may vary if the set up is being performed on a PC/server that has an OS other than Windows 7. Please refer to your local IT administrator with any questions.*

1. On the local PC/server, click 'Start' -> 'Control Panel' -> 'User Accounts' -> 'Manage User Accounts'. A User Accounts window will display. Click the 'Advanced' tab and then the **Advanced** button;

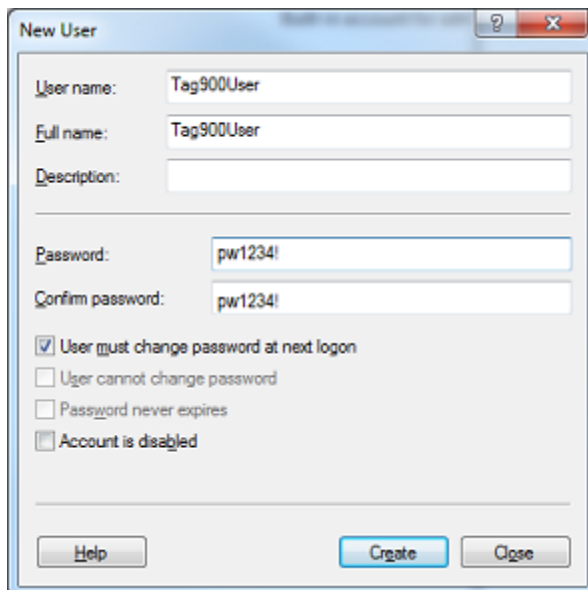


Appendix 1

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



- Enter the User info, for example: 'User name:' = **Tag900User**; and 'Full name:' = **Tag900User**;
- Create the password for the account (example: **pw1234!**);

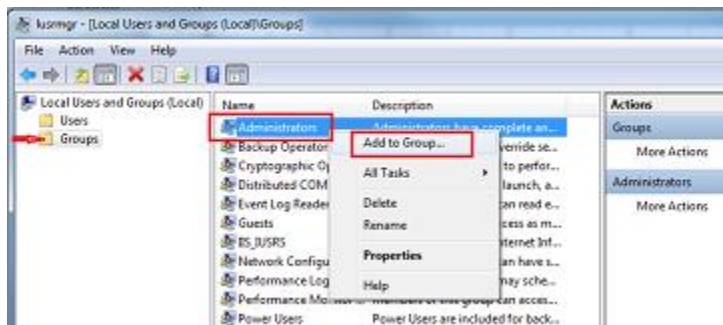


Depending on what your company's network requirements are, you may or may not want to de-select the option to 'User must change password at next logon' in the New User screen.

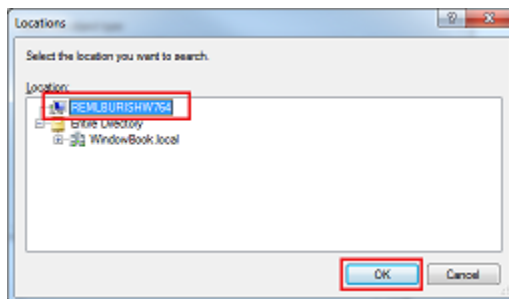
- Click the **Create** button; and
- Click the **Close** button.

Add the New User Account 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..."



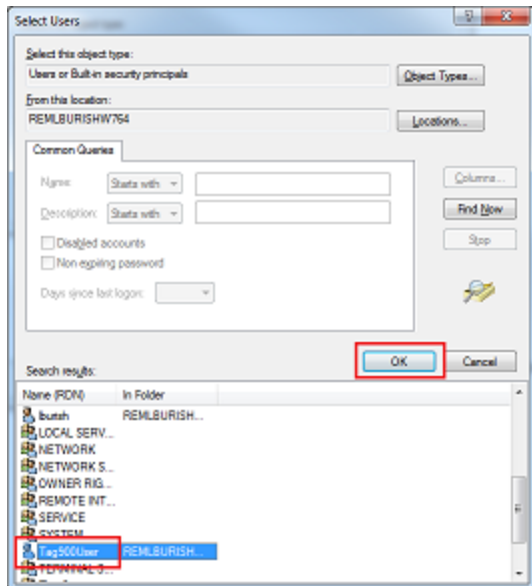
3. The *Administrators Properties* window will display. Click the **Add...** button;
4. The *Select Users, Computers, Service Accounts, or Groups* window will display. Click the **Locations** button;
5. The *Locations* window will display. Locate the computer's name the **Tag900User** account was created on in the list and single-click on it to highlight it. Click the **OK** button;



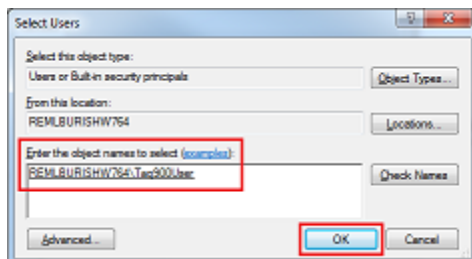
6. You will be returned to the *Select Users* window. Note the computer selected in the preceding step (step 5) is now listed or displayed in the 'From this location' field. Click the **Advanced** button;
7. The *Select Users* window will display. Click the **Find Now...** button;

Appendix 1

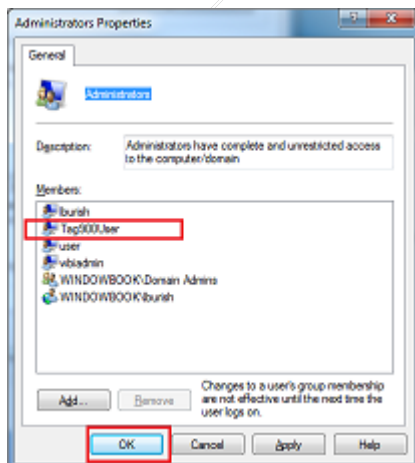
8. The 'Search results:' portion of the screen will populate with existing users. Find the **Tag900User** account created above and single-click on it to highlight it. Click the **OK** button;



9. You will be returned to the *Select Users* window. Note the newly created **Tag900User** account is displayed. Click the **OK** button;



10. You will be returned to the *Administrators Properties* window. Note the newly created user account '**Tag900User**' is listed in the 'Members' field. Click the **OK** button; and restart the computer.



Create a Folder on the PC/Server & Share It with the New User Account



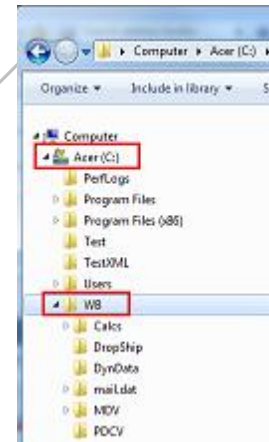
These instructions describe how to setup and configure a single BT-900 to a network share. For those instances where multiple Taggers are being used, refer to [Example: Multiple BT-900 Setup](#) for an illustration of how to set up multiple Taggers with a network share.

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

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:\');

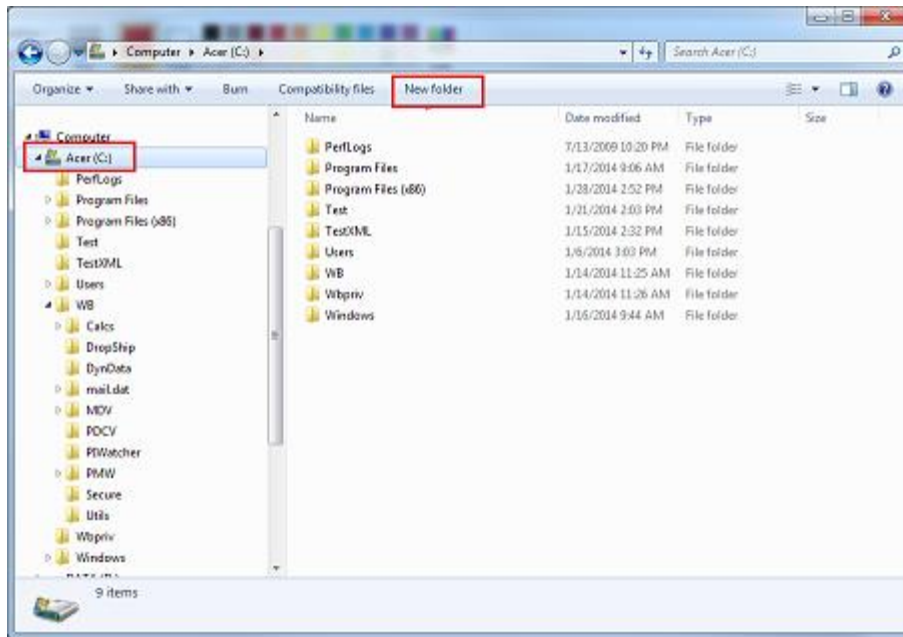


The DAT-MAIL installation will always be identified as a folder named ‘WB’.

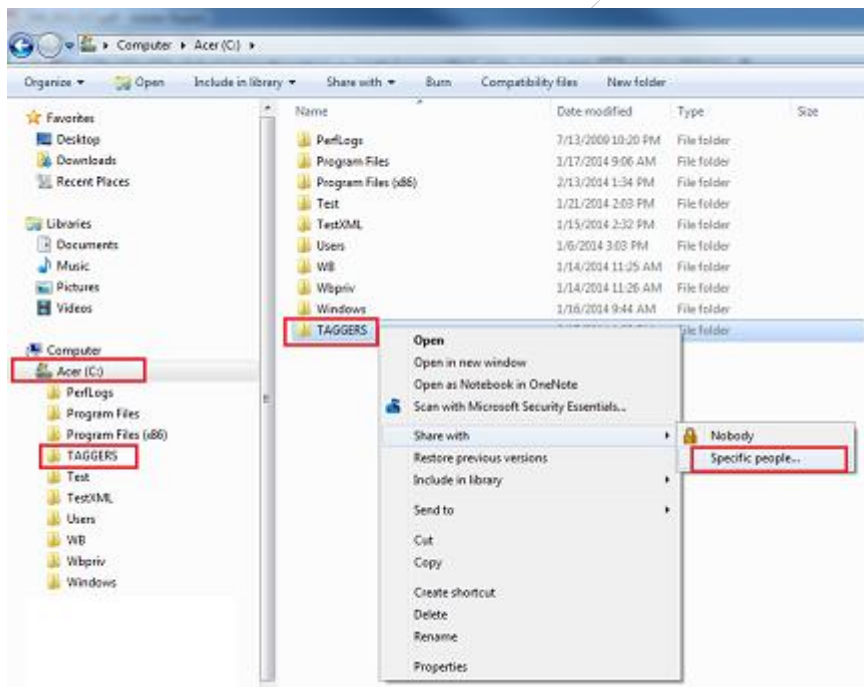


3. In the root of the drive (at ‘c:\’), create a new folder by clicking on the **New Folder** button or by right clicking anywhere in the white area of the window and selecting: New -> Folder. The new folder should be created at the root of the drive, not in the ‘WB’ folder;

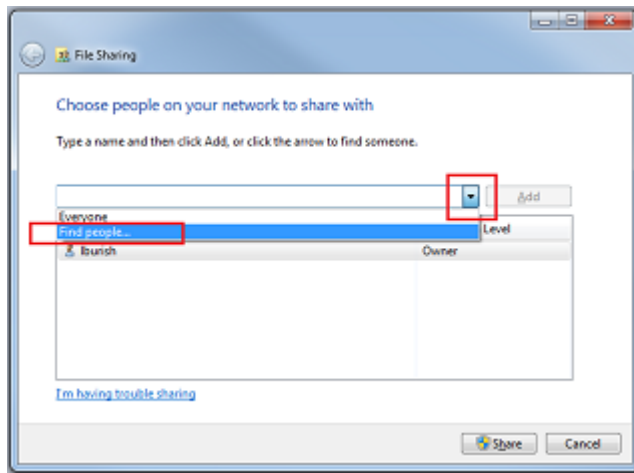
4. Name the new folder '**TAGGERS**' or any other name that is pertinent to the specific user's DAT-MAIL/Tagger install;



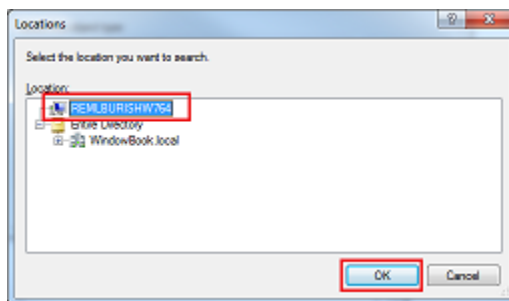
5. Right click on the new folder (**TAGGERS**) and select "Share with..." -> "Specific people...";



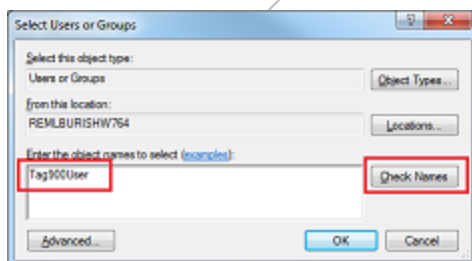
6. A File Sharing window will display. Click the drop-down arrow and select "Find people...";



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;

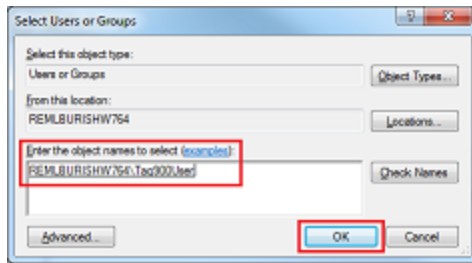


9. You will be returned to the *Select Users or Groups* window. The name of the computer you selected will be displayed. In the 'Enter the object names to select' field, type in the user name ("**Tag900User**") and click the **Check Names** button;

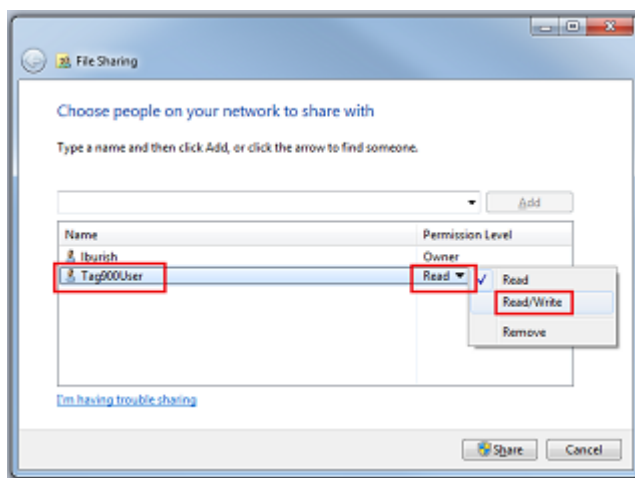


Appendix 1

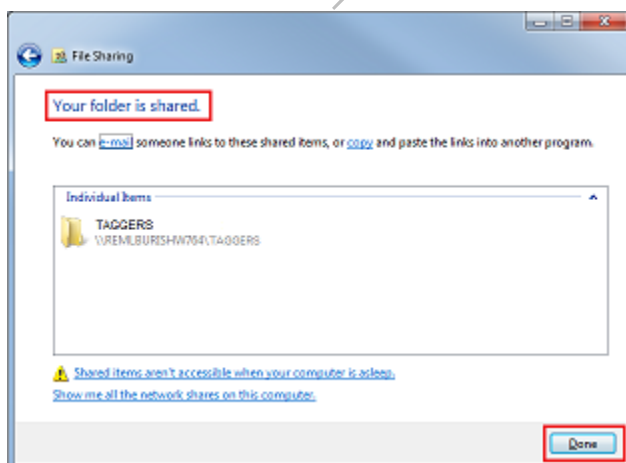
10. When the user account is located, it will display it as: *LocalComputerName\user* or in this example: *REMLBURISHW764\Tag900User*. Click the **OK** button;



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. **TAGGERS**) has been shared; and



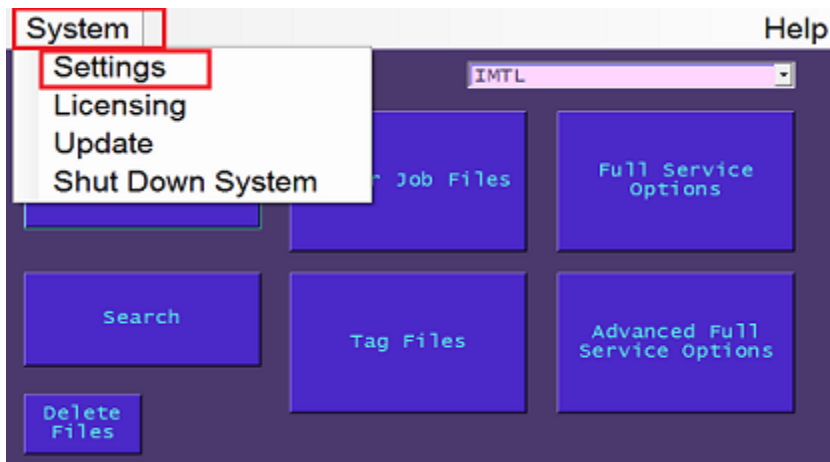
13. Click the **Done** button.

Set Up the Network Configuration of the BT-900

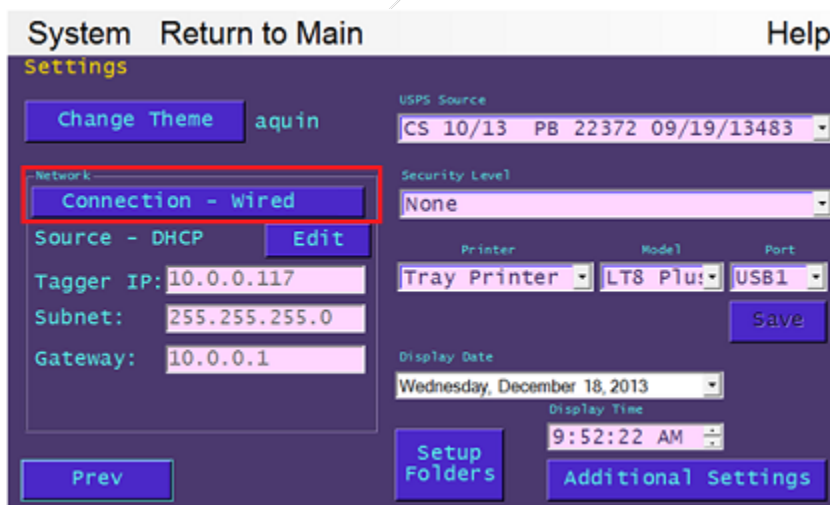
Determine whether or not your Tagger will be hard-wired to the network it is to be connected to or if a wireless connection will be used. In this example, a hard-wired connection will be created; therefore it is assumed the proper CAT-5 cable connection has been established prior to beginning this procedure.

To set up the network configuration for your BT-900, perform the following:

1. Power ON the BT-900;
2. From the BT-900's *Main Menu* touch screen, gently tap or touch the 'System' menu found in the top-line menu bar, and tap/select 'Settings'




3. The BT-900's *System Settings* touch screen will display. Set the network connection type to wired by gently tapping or touching the **Connection** – touch button;




4. If you are going to use a 'DHCP' source type, the BT-900 will automatically assign the IP address information. In this example, a 'DHCP' connection is used.

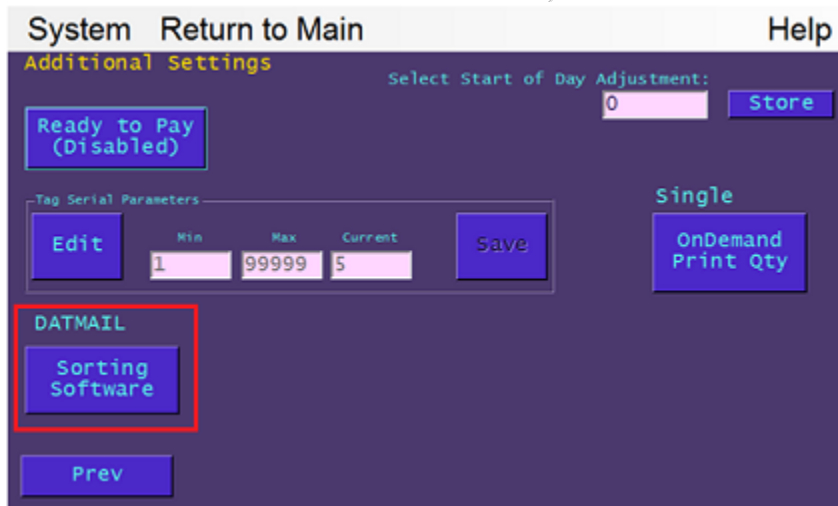
 Consult with your IT Person/Network Expert to determine whether your network uses a DHCP server or not.

5. If the use of a 'Static' IP address is preferred, gently tap the **Edit** touch button located directly below the **Connection – 'Wired'** touch button. The *LAN Configuration* touch screen will display. Enter the static IP address, along with the Subnet Mask and the Gateway information;
6. You can also ping the local PC/server from this screen to ensure a connection has been established;
7. Gently tap or touch the **Prev** touch button to return to the previous (*Settings*) touch screen;

 It takes a few seconds for the BT-900 to return to the *Settings* touch screen once the **Prev** touch button has been tapped. Please have patience and refrain from tapping the **Prev** touch button numerous times. Doing so could result in a system error message or the return to a touch screen other than the *Settings* touch screen.

 Until actual communication is made between the BT-900 and the local PC/Server, the "Source" label on the *Settings* touch screen will not change (i.e. DHCP to Static or Static to DHCP).

8. From the *Settings* touch screen, gently tap or touch the **Additional Settings** touch button;
9. The *Additional Settings* touch screen will display. Gently tap or touch the **Sorting Software** toggle touch button until a value of 'DATMAIL' is displayed;




10. Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen;
11. The connection to the local PC/server and the BT-900 is now configured.


Configure the Windows Folder Share Settings on the Tagger

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

1. From the BT-900's Settings touch screen, gently tap or touch the **Setup Folders** touch button;
2. The *Server Share* touch screen will display. Gently tap or touch anywhere in the blank, 'Shared Server IP' field so a blinking cursor appears in the field and enter the IP address of the local PC/Server the newly created Windows folder is located on by using the physical keypad located on the front of the BT-900;
3. Gently tap or touch the **Ping** touch button to confirm communication with the local PC/Server is established;
4. Gently tap or touch in the empty 'Shared Folder Name' field. An alpha-numeric key pad will display on the touch screen. Enter the name of the Windows Shared folder created under [Create a folder on the Local PC/Server & Share It with the New User Account](#) above (i.e. 'Tagger1');

 *Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.*

5. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "Tagger" populating the 'Shared Folder Name' field;
6. Enter the Tagger User ID by gently tapping or touching the 'Tagger User ID' field. An alpha-numeric key pad will display. Enter "Tag900User" which was the User Name given to the new user account created under [Create a New User Account on the Local PC/Server](#) above (specifically, [step 3](#));
7. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "Tag900User" populating the 'Tagger User ID' field;
8. Enter the Tagger Password by gently typing or touching the 'Tagger Password' field. An alpha-numeric key pad will display;

 *The 'Tagger Password' field may already be populated with a pre-existing password displayed as asterisks '*'. You will need to remove the existing password and enter the correct one, the instructions for which immediately follow.*

9. Tap or touch the **Back** touch key on the key pad as many times as necessary to erase the pre-existing password information from the field; then, enter the correct password as stipulated above in [Create a New User Account on the Local PC/Server](#) above (specifically, [step 4](#)), which is "pw1234!";

Appendix 1



Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.

10. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "pw1234!" populating the 'Tagger Password' field;
11. Gently tap or touch the **Test Settings** touch button. The 'Status' window will populate with a 'Succeed' confirmation message;



If a 'Failed' message displays in the 'Status' window, confirm the correct spelling and correct case was used when entering the Shared Folder Name, Tagger User ID, and Tagger Password.

12. Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen. The configuration is complete.

APPENDIX 2

CONNECTING TO THE BT-900 BUILT-IN FILE SERVER FROM A WINDOWS PC

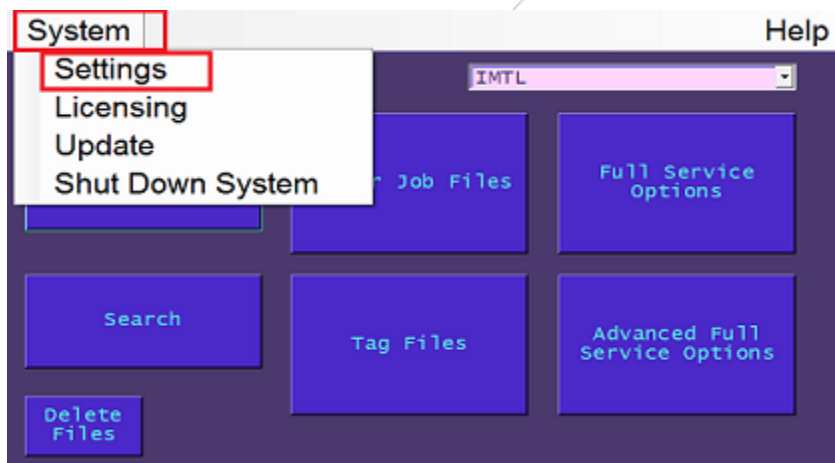
There are 3 steps to connecting to the BT-900 built-in file server from a windows PC. They are: 1) Set Up the Network Configuration on the BT-900; 2) Set the File Server Settings on the BT-900; and 3) Map a Network Drive on the PC/Server to the BT-900's File Share.

Set Up the Network Configuration on the BT-900

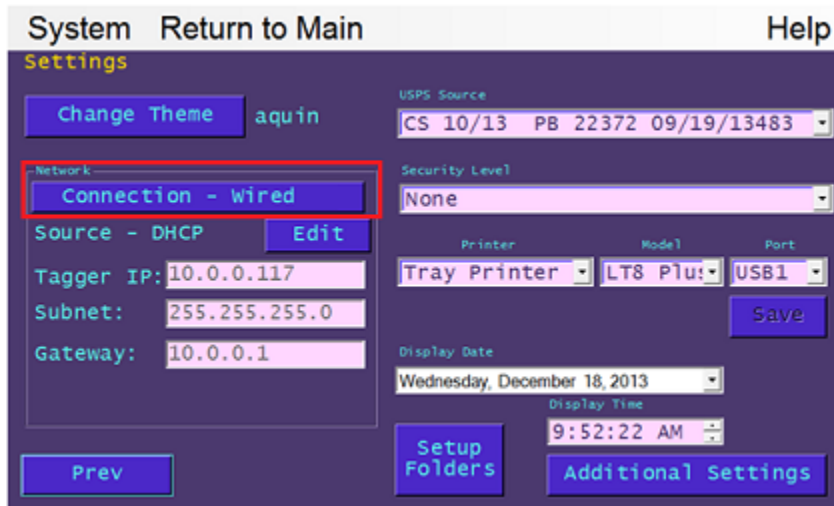
Determine whether or not your Tagger will be hard-wired to the network it is to be connected to or if a wireless connection will be used. In this example, a hard-wired connection will be created; therefore it is assumed the proper CAT-5 cable connection has been established prior to beginning this procedure.

To set up the network configuration for your BT-900, perform the following:

1. Power ON the BT-900;
2. From the BT-900's *Main Menu* touch screen, gently tap or touch the 'System' menu found in the top-line menu bar, and tap/select 'Settings'



- The BT-900's *System Settings* touch screen will display. Set the network connection type to wired by gently tapping or touching the **Connection** – touch button;



- If you are going to use a 'DHCP' source type, the BT-900 will automatically assign the IP address information. In this example, a 'DHCP' connection is used.

i Consult with your IT Person/Network Expert to determine whether your network uses a DHCP server or not.

- If the use of a 'Static' IP address is preferred, gently tap the **Edit** touch button located directly below the **Connection – 'Wired'** touch button. The *LAN Configuration* touch screen will display. Enter the static IP address, along with the Subnet Mask and the Gateway information;
- You can also ping the local PC/server from this screen to ensure a connection has been established;
- Gently tap or touch the **Prev** touch button to return to the previous (*Settings*) touch screen;

i It takes a few seconds for the BT-900 to return to the *Settings* touch screen once the **Prev** touch button has been tapped. Please have patience and refrain from tapping the **Prev** touch button numerous times. Doing so could result in a system error message or the return to a touch screen other than the *Settings* touch screen.

i Until actual communication is made between the BT-900 and the local PC/Server, the "Source" label on the *Settings* touch screen will not change (i.e. DHCP to Static or Static to DHCP).

- From the *Settings* touch screen, gently tap or touch the **Additional Settings** touch button;

9. The *Additional Settings* touch screen will display. Gently tap or touch the **Sorting Software** toggle touch button until a value of 'DATMAIL' is displayed;

Min	Max	Current
1	99999	5

10. Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen;

The connection to the local PC/server and the BT-900 is now configured.

Set the File Server Settings on the BT-900

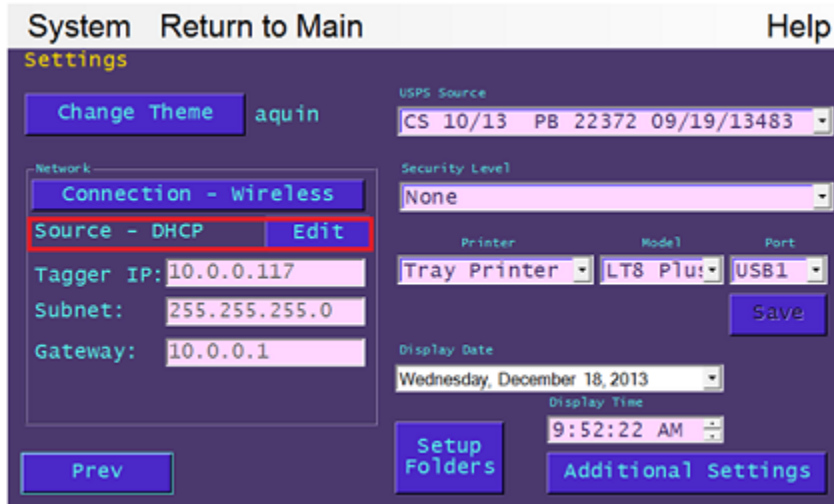
To set the file server settings on the BT-900, perform the following:

1. From the BT-900's *Settings* touch screen, gently tap or touch the **Control** – toggle touch button to select the connection type (i.e. Wired or Wireless). For this example 'Wired' is used;

Printer	Model	Port
Tray Printer	LT8 Plu	USB1

- Click the Edit button to select the Source type. This example uses a source type of 'DHCP';

i *Until actual communication is made between the BT-900 and the local PC/Server, the "Source" label on the Settings touch screen will not change (i.e. DHCP to Static or Static to DHCP).*




- Gently tap or touch the **Setup Folders** touch button. The Server Share touch screen will display;

i *Your BT-900's built-in file share name, user ID, and password are displayed along the right side of the Server Share touch screen. In the following steps, this example uses a Shared Folder Name of: '\\10.45.29.198\Data', a Tagger User ID of: 'BT900-3777\BTUSER', and a Tagger Password of 'BT1user'.*


- Gently tap or touch in the empty 'Shared Folder Name' field. An alpha-numeric key pad will display on the touch screen. Enter the name of the BT-900's shared folder name "\\10.45.29.198\Data";

i *Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.*


- Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "\\10.45.29.198\Data" populating the 'Shared Folder Name' field;
- Enter the Tagger User ID by gently tapping or touching the 'Tagger User ID' field. An alpha-numeric key pad will display. Enter "BT900-3777\BTUSER";
- Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "BT900-3777\BTUSER" populating the 'Tagger User ID' field;
- Enter the Tagger Password by gently typing or touching the 'Tagger Password' field. An alpha-numeric key pad will display;

 *The 'Tagger Password' field may already be populated with a pre-existing password displayed as asterisks '*'. You will need to remove the existing password and enter the correct one, the instructions for which immediately follow.*

9. Tap or touch the **Back** touch key on the key pad as many times as necessary to erase the pre-existing password information from the field; then, enter the correct password of "BT1user";


 *Gently tapping to touching the 'Shift' key once, puts the key pad in an 'all caps' mode and also allows the use of other characters that would require the shift key to be pressed on a standard key board. To return to a lower-case mode, gently tap or touch the 'Shift' key a second time.*

10. Gently tap or touch the **Enter** touch key on the touch screen's key pad when finished. The key pad will close and the Server Share screen will display with "BT1user" populating the 'Tagger Password' field;
11. Gently tap or touch the **Test Settings** touch button. The 'Status' window will populate with a 'Succeed' confirmation message;

 *If a 'Failed' message displays in the 'Status' window, confirm the correct spelling and correct case was used when entering the Shared Folder Name, Tagger User ID, and Tagger Password.*

12. Gently tap or touch the **Prev** touch button to return to the *Settings* touch screen. The configuration is complete.

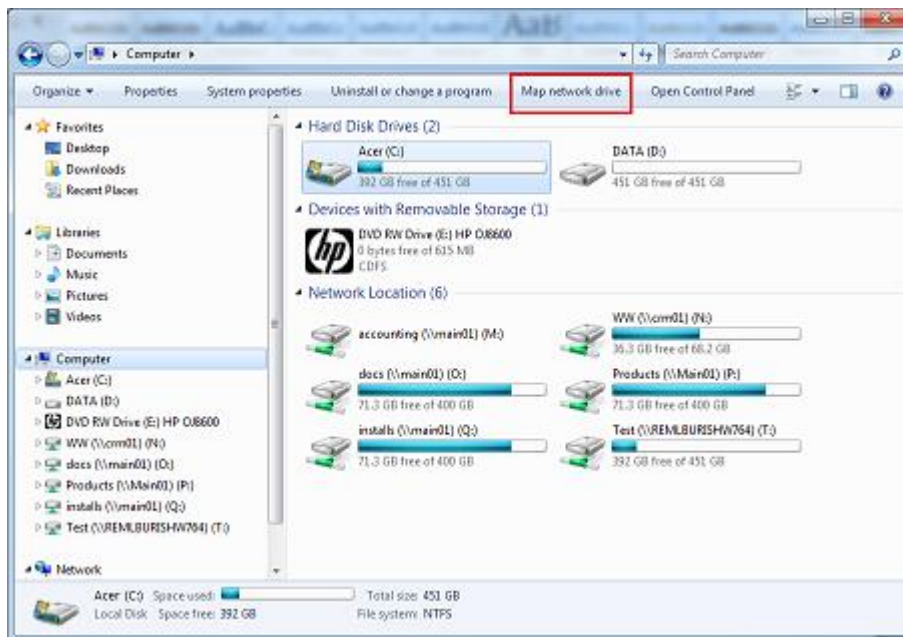
Map a Network Drive on the PC/Server to the BT-900's File Share

 *The following 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.*

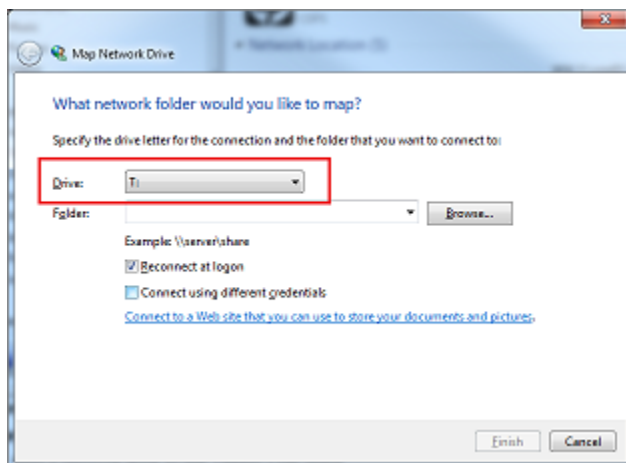
To map a network drive to the BT-900's file share, perform the following:

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;

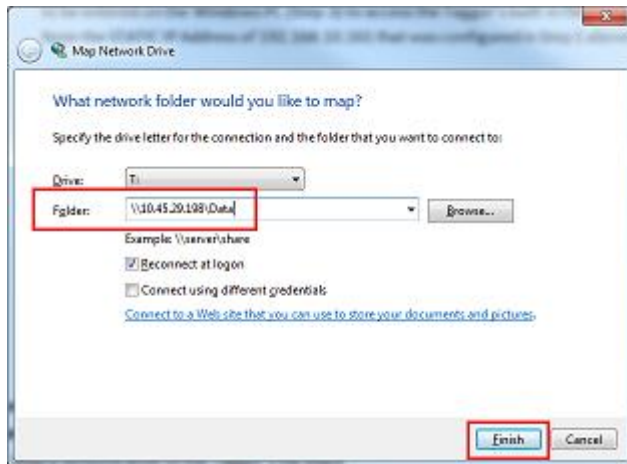
2. Single click the option to 'Map Network Drive';



3. A *Map Network Drive* window will display. Select an available drive letter (this example uses 'T');



4. A window will display. Enter the complete folder path, including the IP address (e.g. "10.45.29.198\Data"):

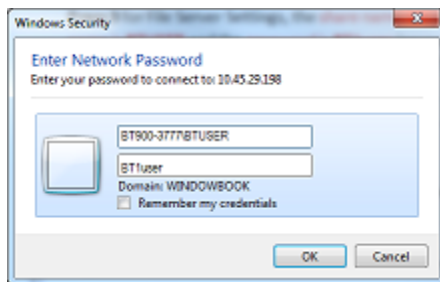


Select the 'Reconnect at login' option if you want to access the Tagger's file share in the future;

Select the 'Connect using different credentials' if your PC/server is configured for a domain/workgroup; and

Click the **Finish** button.

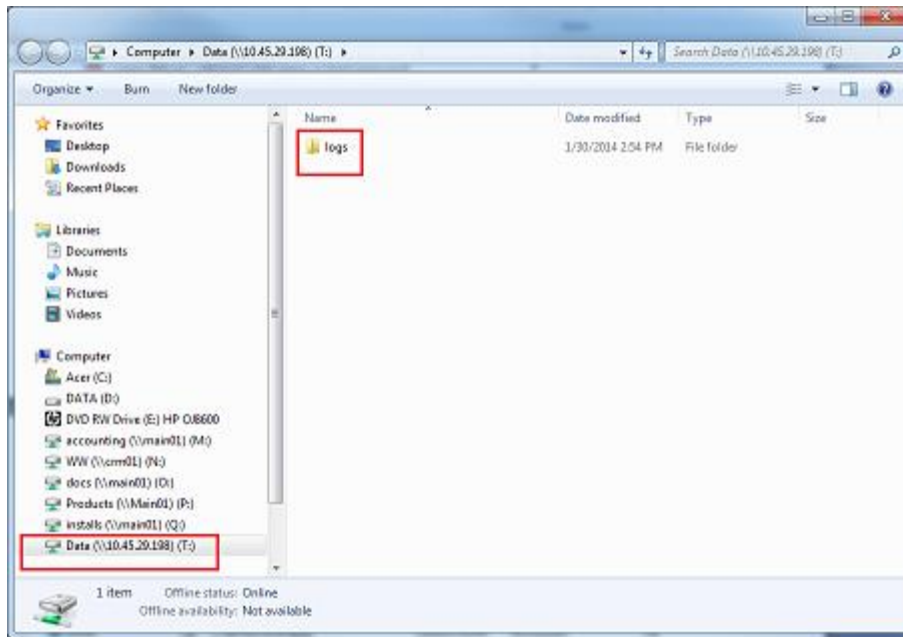
5. A Windows Security window will display. Enter the BT-900's User Name and Password, using the values entered into the BT-900 itself under [Set the File Server Settings on the BT-900](#) above,... specifically [step 6](#) and [step 9](#), respectively (e.g. "BT900-3777\BTUSER", and "BT1user");



If you don't want to have enter the user ID and password every time you access the file share, select the 'Remember my credentials' option;

6. Click the **OK** button;

- The Computer window will display, specifically the BT900's file share (mapped to network drive 'T', which contains the 'logs' folder;



If you cannot access the BT-900's built-in file share, verify that the IP configuration in [Set Up the Network Configuration on the BT-900](#) above is correct and/or check for any type-o's; especially password credentials, which are case sensitive.

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!

Supplemental Documentation

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-MLOCR 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 WINDOW BOOK OR WHITTIER MAILING PRODUCTS

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. Items to note:

- Make sure that there is a carriage return (CR) or carriage return–line feed (CRLF) added to the end of each scan;
- Some scanners may have the option to insert commas between the IMb data elements. Though it should be OK, it has not been tested.; and
- 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 barcode below:

