

PrintStream Interface User Guide

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Overview

The interface between Streamline Solutions PrintStream and WBI's Post Master and DAT-MAIL™ programs allow PrintStream users to enjoy the best features of both products without redundant data entry. The key benefits of the interface are:

- Drops can be setup and scheduled in DAT-MAIL™ then transferred to PrintStream where they are used to define list counts and drops. DAT-MAIL™'s ability to manipulate this data solves many problems large mailers have had using PrintStream's Mail.dat module.
- Statements and list counts generated in PrintStream can be transferred to DAT-MAIL™ or Post Master for final editing and printing and to take advantage of the 66+ reports available from these products.
- Statements can be verified in Post Master or DAT-MAIL™ and the final statement postage transferred back to PrintStream.
- Statements for any mail class can be generated by DAT-MAIL™ or Post Master, then transferred to PrintStream for postage accounting and inventory control purposes. DAT-MAIL™ and Post Master can access PrintStream Master File data so that only valid job and client information will be used in these statements, and users will not have to re-key any of this data into the WBI products.

How the Interface Works

List counts, drop information and Statement data are exchanged between the two products using XML files at critical points in the processing of a job. For mailers creating or receiving Mail.dat files, DAT-MAIL™ provides powerful Mail.dat manipulation, container-level reporting and drop scheduling capabilities.

In DAT-MAIL™, the user can define how the drops will be created, and can schedule the drop date for each. This data is exported as an XML file which is then imported into PrintStream at which time PrintStream package information is associated with these drops. The imported data creates drops and list counts for the job so this information can be immediately used to print Work Tickets.

PrintStream users can modify drop and package information during production, create estimates or statements from inside of PrintStream then pass this data to WBI's DAT-MAIL™ or Post Master. These WBI products create a series of statements from this information which can be further modified and then printed. Once the statement is in DAT-MAIL™ or Post Master, this information is

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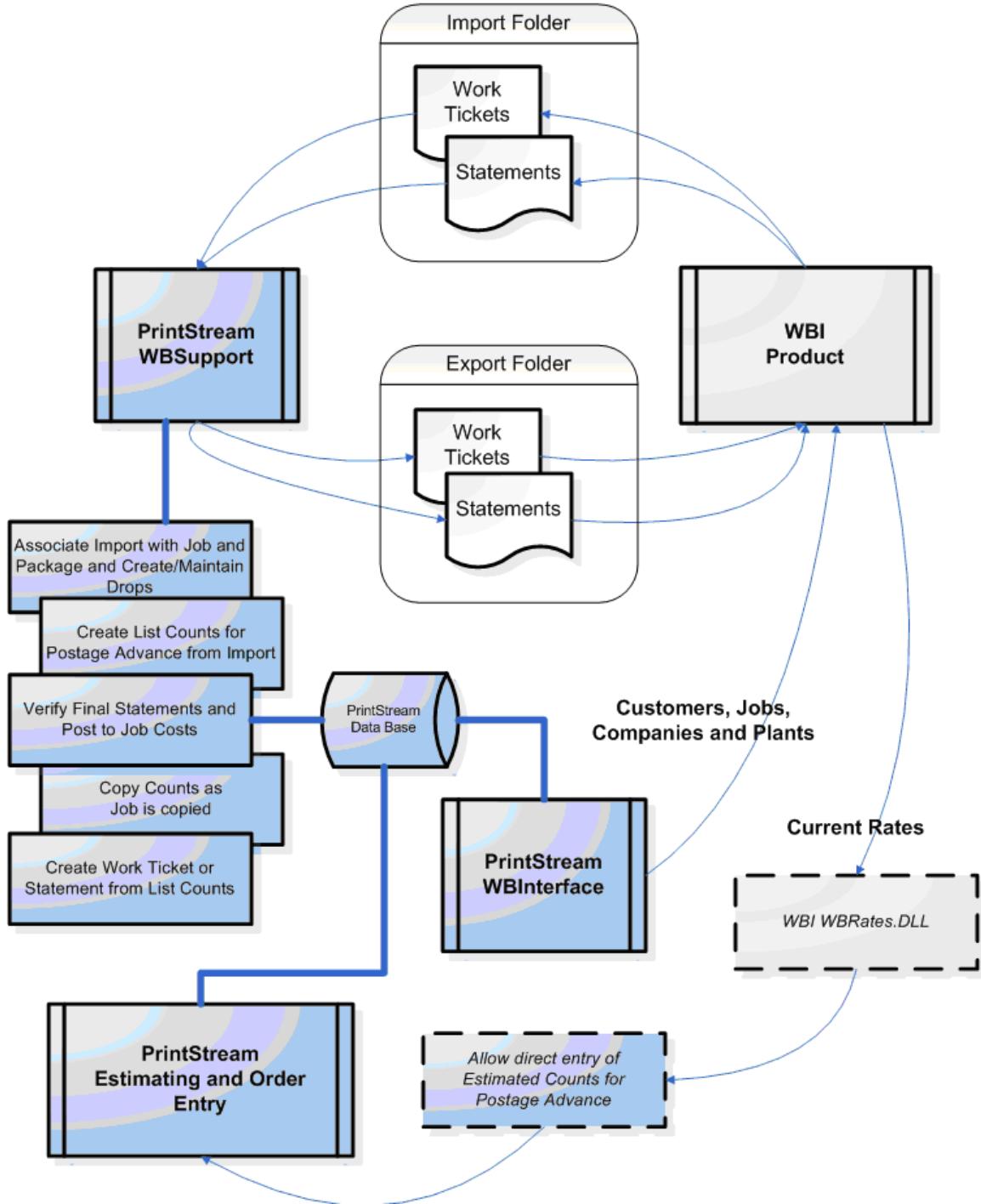
available in postage reports, including the Optional Procedure Running Summary which can now include all statement data, no matter what the source of statement.

When the statement is round stamped, it can be verified in DAT-MAIL™ or Post Master then exported back to PrintStream where it is posted as 'final' postage affecting both Postage Accounting and inventory.

When creating statements manually in Post Master or the DAT-MAIL™ Statement Printing program, WBI users are able to access PrintStream job and client data directly in real-time WITHOUT an ODBC connection from both PrintStream MS SQL and Pervasive SQL versions.

The following chart provides a visual overview of the interface:

PrintStream – WBI Interface Overview



Set Up

- 1. Registration:** Obtain a new registration code from your WBI sales rep that includes the PrintStream option.
- 2. Create Transfer Folders:** Create two folders on a network drive that are accessible to all PrintStream or DAT-MAIL™/Post Master users. One would hold information transferred from PrintStream to either DAT-MAIL™ or Post Master and the other would hold the information transferred from Post Master or DAT-MAIL™ to PrintStream. For the purposes of this documentation we are using the \temp\PrintStream\import as the folder that will store the data exported by the WBI program and imported by PrintStream and \temp\PrintStream\export for data going from PrintStream to the WBI folder. In addition, we would create two subfolders under the folder where PrintStream is sending its data to DAT-MAIL™ to store successfully imported and unsuccessfully imported statements. (See IMXML installation instructions below)
- 3. Program Setup:** DAT-MAIL™ users need to do the setup in two places, the program setup screen of the main Mail.dat program where the drop file path is defined and the program setup screen of the statement printing program where the postage export is defined. Post Master users will only need to do the postage export setup.

DAT-MAIL™ DROP DATA TRANSFER SETUP:

From the DAT-MAIL™ File Menu, select Program Setup then go to the Export/Archive Tab and select a folder to hold the transferred data you are exporting to PrintStream then press the OK button to save your entry.

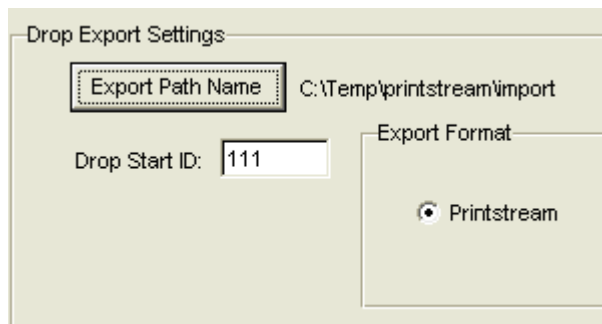


Figure 1 - Drop Import Configuration in DAT-MAIL™

DAT-MAIL™ STATEMENT PRINTING AND POST MASTER SETUP:

NOTE: If you have activated PostalOne! Web Services, you will not be able to use the Printstream interface. The Web Services program exports Statement XML files which conflicts with Printstream XML statement export.

a. If you are using DAT-MAIL™, press the '3602' button and go to the File Menu, then select Program Setup. If using Post Master, go to the File Menu and select Program Setup. On the General tab, you will see an External Data field selection.



Figure 2 - Enabling PrintStream Interface in Post Master or DAT-MAIL™ Statement Printing Program

b. Select PrintStream from the drop box. The settings button only has to be pressed if you wish to disable the PrintStream interface on this workstation. If you do not have Printstream installed on your workstation, you will not be prompted to disable the interface.

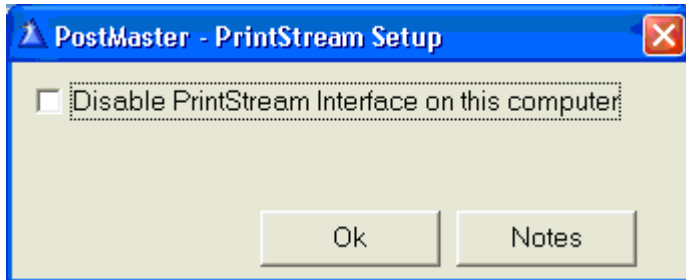


Figure 3 - PrintStream Settings Dialog - allows disabling of interface on a single workstation

c. In the Program Setup Screen, go to the Export Tab. You must enable the PrintStream Export of your finalized statement data here by highlighting the PrintStream XML line and pressing the "Change" button. For those in the process of switching from Pro-Mail 4, this interface can also be enabled so that postage usage can be exported to both systems during a transition period.

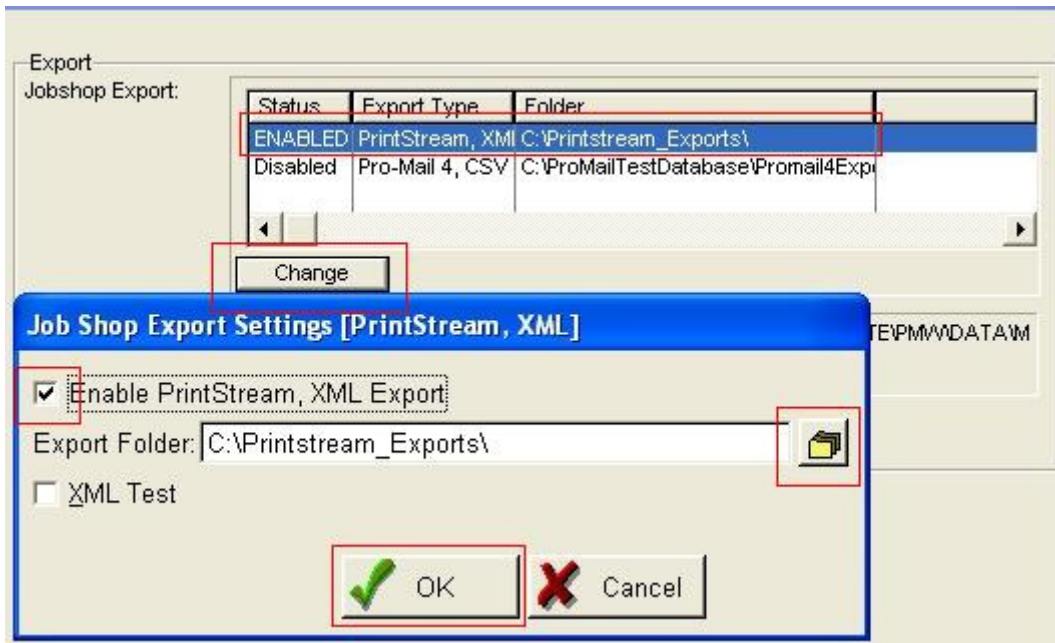


Figure 4 - Jobshop Export Screen where postage export is defined.

d. You check off the enable PrintStream Export and enter path that will be used to transfer statement data from DAT-MAIL™ or Post Master to PrintStream. Press the lookup button to the right of the Export Folder field to select the path where you will be exporting data to PrintStream.

Do not check off the 'Test XML' checkbox. This is used to generate all field tags in your XML files whether there is data to put in these fields or not. It is there for diagnostic purposes and will slow down your data export.

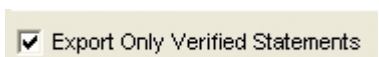


Figure 5 - Enable only the export of Verified Statements

IMXML Installation: IMXML is a utility that imports list count and statement data from PrintStream and creates statements in DAT-MAIL™ or Post Master. It should only be run on one workstation. It could also run on the server if a PSQL client has been installed though this will use up one of your PSQL connection licenses. We suggest installing this utility on the workstation that will be using DAT-MAIL™ or Post Master the most. On the computer that you will be running IMXML on, run the IMXMLUtility.exe program that is located in the \wb\mdv folder for DAT-MAIL™ or the \wb\pmw folder for Post Master. This program will create a shortcut in your computer's Startup Program Group which will automatically launch IMXML when the computer is started. It will also put a shortcut in the Window Book program group in your Program Menu so you can restart the program manually if it is ever shut down. After the shortcuts are

installed, it will launch the program so you can set up the paths. This is the screen you will see:

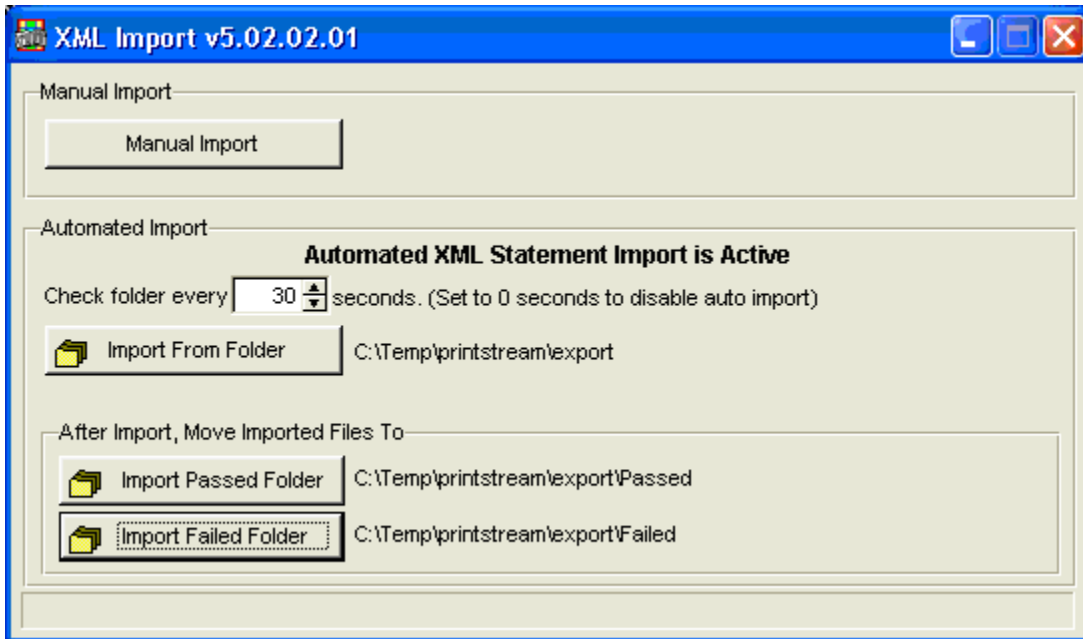


Figure 6 - IMXML Dialog with setup options

The import folder is where you will set PrintStream to export its list counts and statements. You should create two subfolders to hold the successfully imported and the unsuccessfully imported XML files. After IMXML imports the files are moved to one folder if the import was successful and another folder if the import failed. You should also set the import interval to a value between 30 and 60 seconds.

PRINTSTREAM SETUP

- a. You will need to follow directions supplied by PrintStream to install and register your Window Book Interface and place it on the Postage Menu.
- b. Go to the Postage Menu and Select the Window Book Support Option. Select the Setup option.
- c. You must select import and export folders for the data going to and coming from your Window Book product. Use the folders already defined in Window Book. If you use the word import or export in your folder names, please do not get them confused. The sample paths in these screen shots use the import folders for sending data to PrintStream and the export folder for bringing data into the Window Book product.

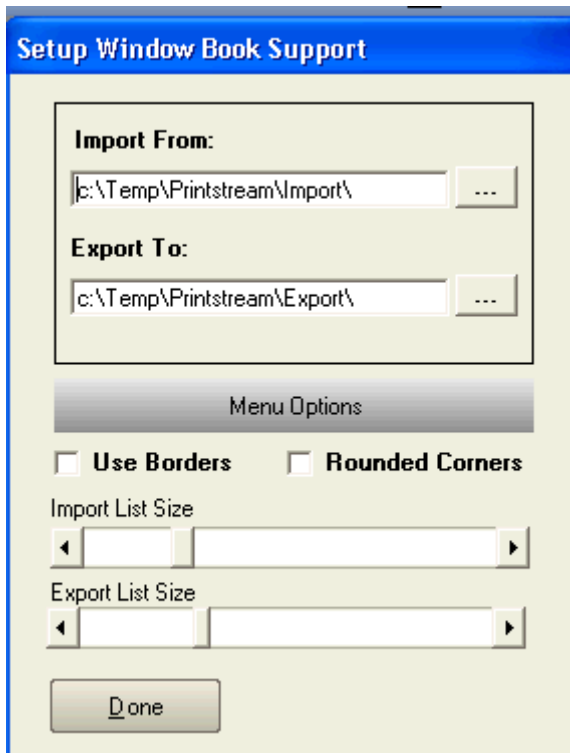


Figure 7 – PrintStream’s Window Book Support Setup Dialog

d. You should import the latest Entry Point /Post Office list to your Vendor Master.

- Unzip the Entry Point/Post Office file into a temporary folder with no spaces in the folder name.
 - Launch PrintStream and then launch Master Files Vendor
 - Go to FILE > Download Vendors from Excel Spreadsheet
 - Confirm “yes”
 - Enter the Path to location of provided file and proceed
-
-

DAT-MAIL™ Standard Operating Procedures

1. Import a Mail.dat file and make whatever changes you want to the entry plan.

2. **Schedule Drops:** Go to the Mail Schedule view and choose a sortation order for your drop file. You have options to introduce segment number into the sort order and this will create a separate drop for each segment and entry point. You can select multiple drop records and change the estimated mailing date for these selected drops by just changing one of the selected records. When all drop dates have been assigned, press the 'Export to PrintStream Button'. A separate XML file will be created for each drop date, processing category and mail class.

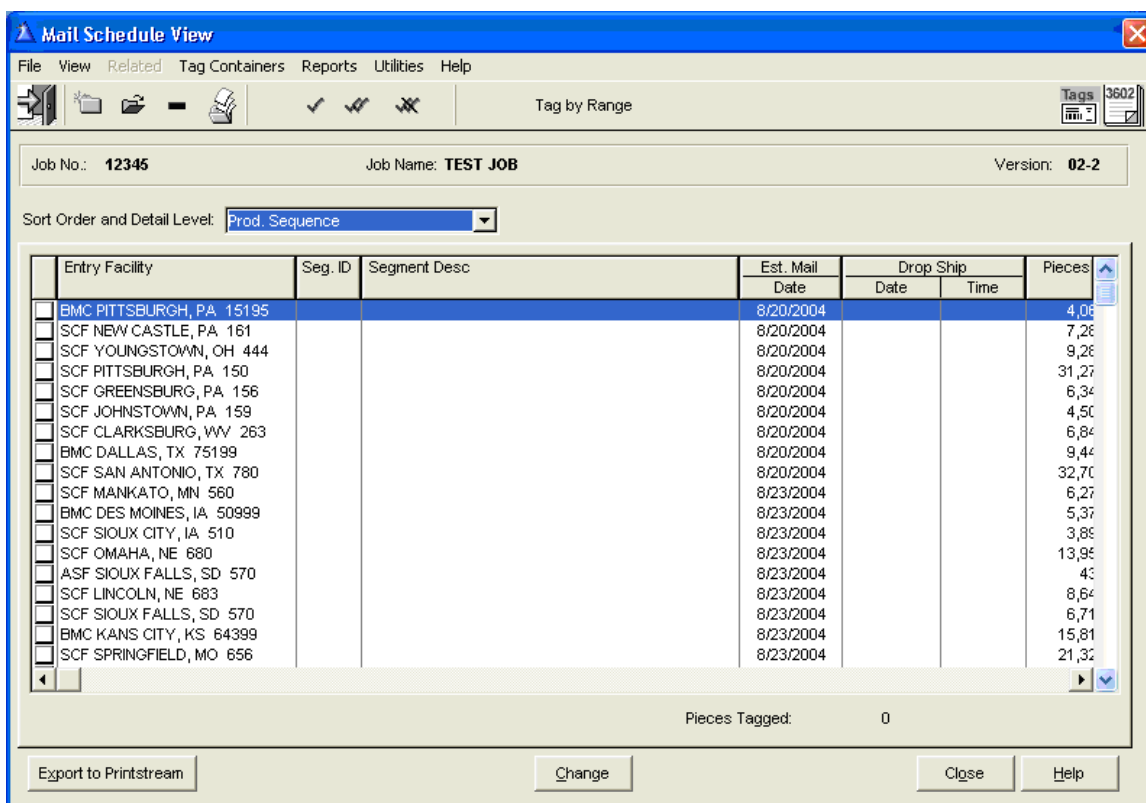


Figure 8 - Mail Schedule View - you can easily schedule mail dates and create XML drop export files for PrintStream

Sort Orders Currently Supported are:

- Entry ZIP – drops are created in entry point ZIP Code sequence
- Production Sequence – drops will be in presort order. If you are doing your presort in far-point sequence, this will assign your drops in that order.

- Segment and Entry ZIP – creates a separate drop for each segment and entry point in segment/Entry ZIP order
- Segment and Production Sequence – creates a separate drop for each segment and entry point in segment and presort entry point order. Different segments can be created in Mail.dat to reflect different production runs (ie. versions) or processing categories (ie. letters and flats mixed in the same job).
- Entry ZIP and Segment
- Segment and Entry ZIP
- Mail Date and Entry ZIP – you can assign different mail dates to different groups of containers no matter what their entry point. This would allow you to define multiple drops even for a file that was not drop shipped!
- Mail Date and Production Sequence
- Mail Date and Segment

3. Set Starting Drop ID and Export XML Drop File

When you press the 'Export to PrintStream' button, you will get the following dialog

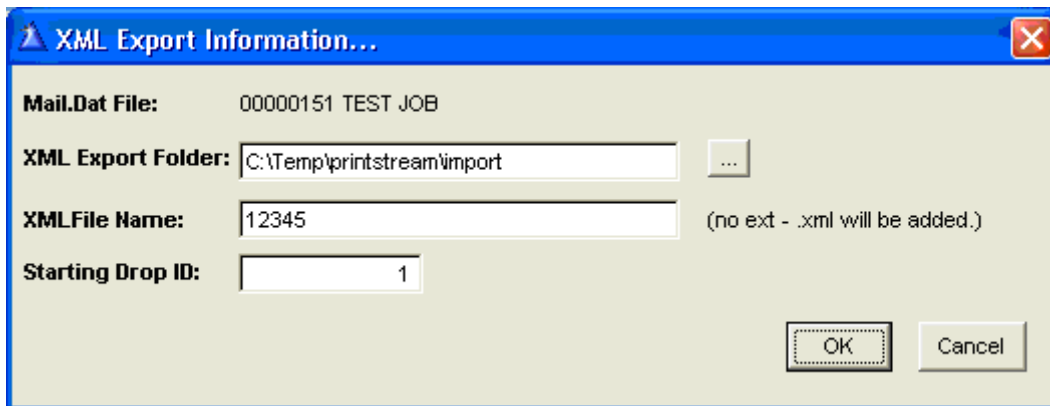


Figure 9 - XML Drop Export Dialog One - Set the starting drop ID for this file.

Here you can confirm the export path and see the file name that will be created. You can also control the starting drop ID that will be associated with the first drop exported. You should reset this number to one when you start a new job but if you have multiple Mail.dat files associated with a single job, the drop numbers will keep incrementing across all Mail.dat files in the job so you can keep the drops separate.

Figure 10 - XML Drop Export Dialog Two without a valid PrintStream Job or Client displayed – press ALT-F9 then the Job lookup button to select a different job

You will see the job that was embedded in the Mail.dat header file and whatever client may be associated with that client in PrintStream. If this job does not match up with one in PrintStream, you will see no client. If you press ALT-F9, a lookup button will appear and you can select a job right from PrintStream’s files and both the client and job will appear. Press the lookup button and select a PrintStream job. You will see the job and client change accordingly. Note: Do not check the checkbox “include containers in export”. This feature is not currently supported by PrintStream and will lengthen your export time.

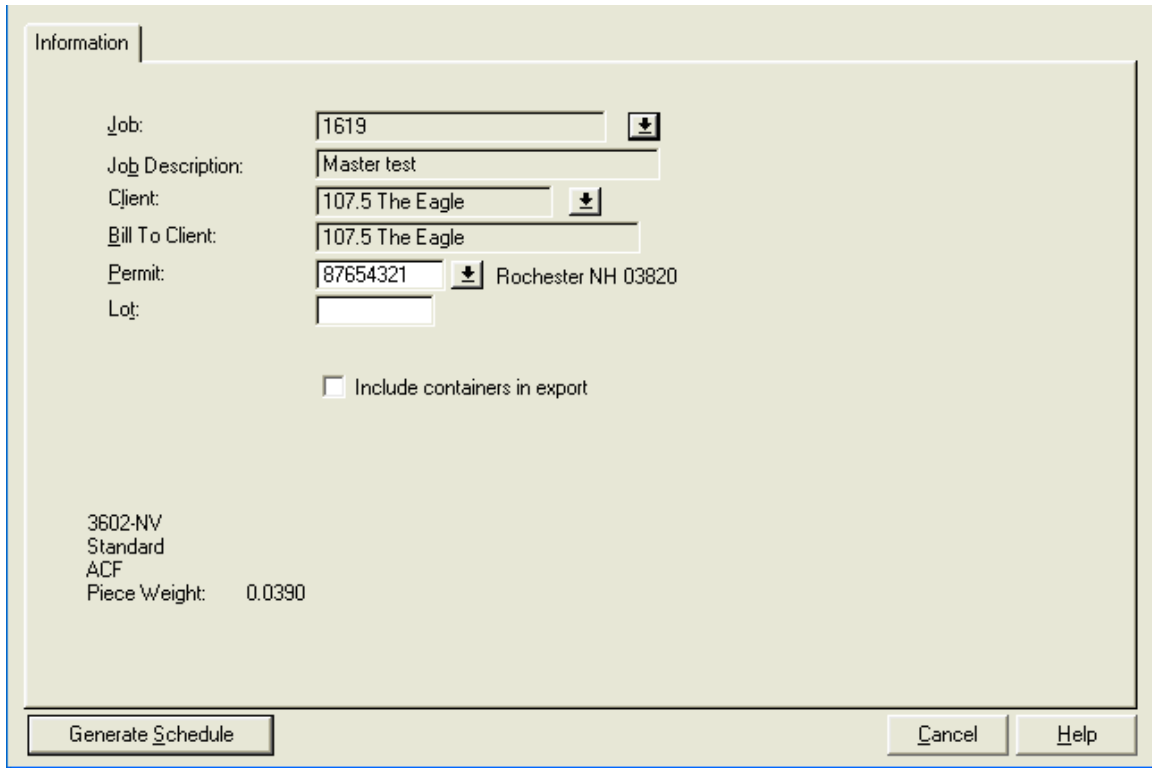


Figure 11 - XML Drop Export Dialog with a valid PrintStream Job and Client selected

Press the Generate Schedule button when you are ready to export your drop schedule to PrintStream.

4. Import Drop Information into PrintStream

Go the Postage Menu of PrintStream V. 11.1 and select Window Book Support:



Figure 12 - Window Book Support option at the end of PrintStream's Postage Menu

- a. Select the 'Select Window Book Imports' off of the top line menu. You will see a list of available XML files to import. There are two types of files you could import, "Drops" and "Statements" but in this step you would only import "Drops". These files have a naming convention of <JobNo>"DROP"<date of mailing YYYYMMDD>. Statements have a similar naming convention: <JobNo>"STMT"<StatementNo><dateofmailng>The statement number will start with the letter "C" for consolidated statements. The time stamp is placed at the

end of the file name to distinguish between multiple exports of the same inform. Only files that have not yet been imported into PrintStream will be displayed.

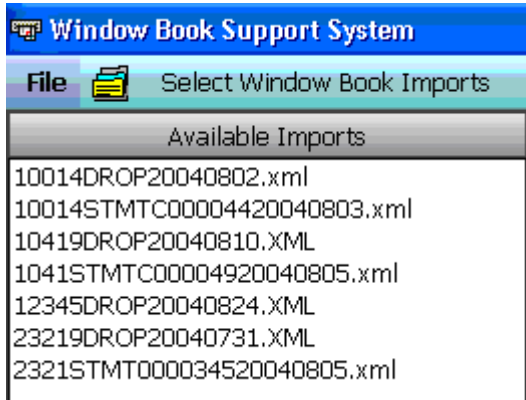


Figure 13 - List of XML files generated by DAT-MAIL™ for import into PrintStream

b. Double click on the Drop file you wish to import into PrintStream’s list counts and you will get this screen:

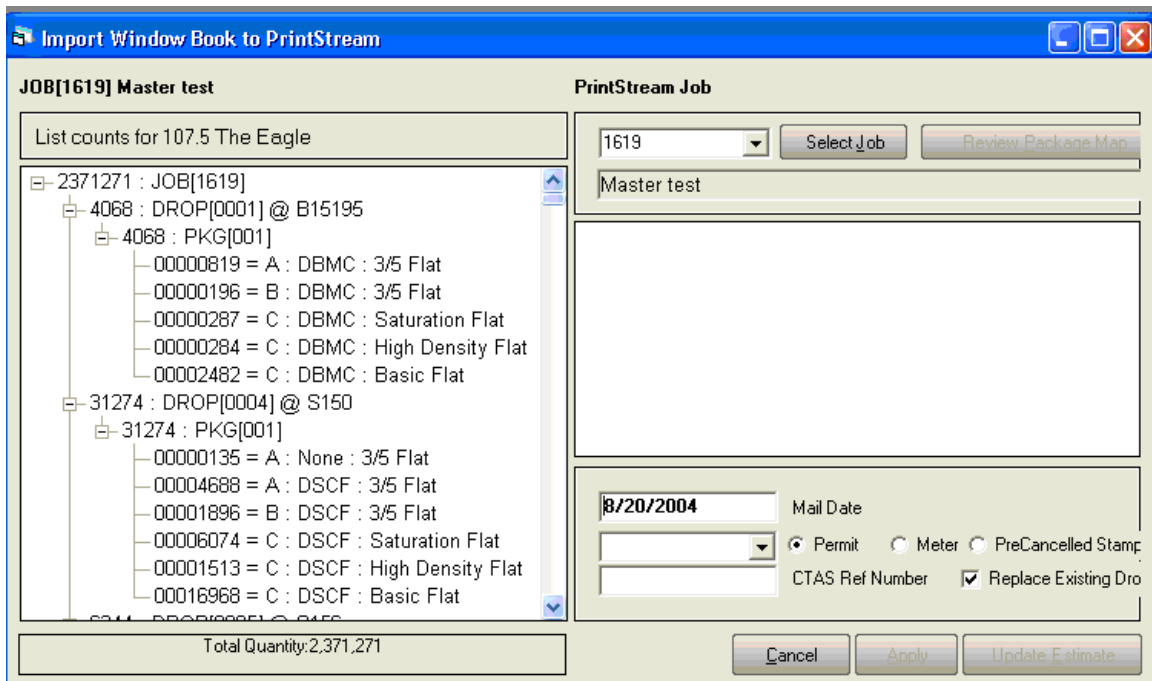


Figure 14 - The Import Window Book to PrintStream dialog with an XML drop file displayed. You must enter the correct job number and press the Select Job button

c. The job that is embedded in the file exported from DAT-MAIL™ will appear on the left side and if it is correct, just press the “Select Job” button on the right side of the screen to display the packages defined for this job. If you want to associate this file with a different job, place your cursor in the Job field on the right side of the screen and press the down arrow key until you see the job you want, then press the “Select Job” button.

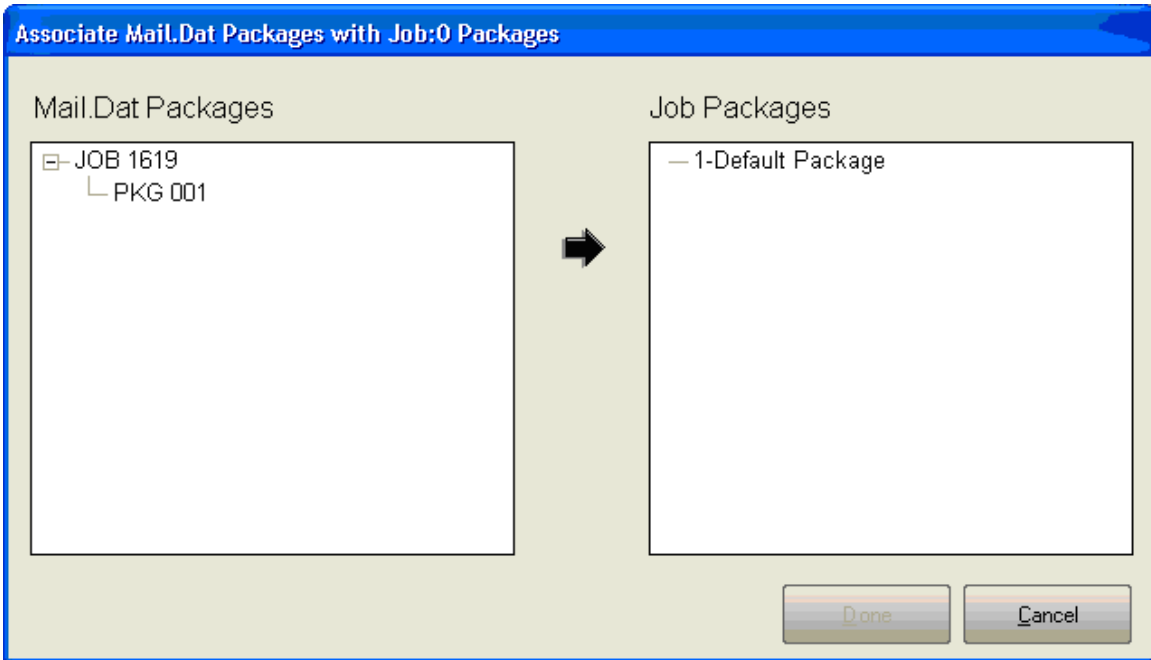


Figure 15 - Associate Mail.dat Packages with Job Dialog - The XML data displayed originated in a Mail.dat file but has to be associated with a valid PrintStream package

d. To assign a PrintStream package to the imported data left click on the PKG number on the left and drag it on top of the PrintStream Job package you want to associate it with on the right.



Figure 16 - Left click on a package number on the left then drag it to the right and place it over the package you want to associate it with

When you let go of the mouse button, the package association will be listed on the right side under the package you have associated the Mail.dat package with.



Figure 17 - Release the mouse button and the job and package number from the left appears under the package on the right.

e. Press the "Done" button on the "Associate Mail.dat Package with Job" dialog. You will return to the Import Window Book to PrintStream dialog where you can override the mailing date in the DAT-MAIL™ export file. You must next select

the permit for this mailing (this is not yet carried over from the DAT-MAIL™ export at this time), select the method of payment and enter a CAPS ID number into the CTAS field if one applies. “Replace Existing Data” checkbox should only be checked if the import is replacing a previous import. Press the Apply button.. If the Apply button is disabled when this checkbox is checked, it usually means that you have not yet imported any counts to replace.

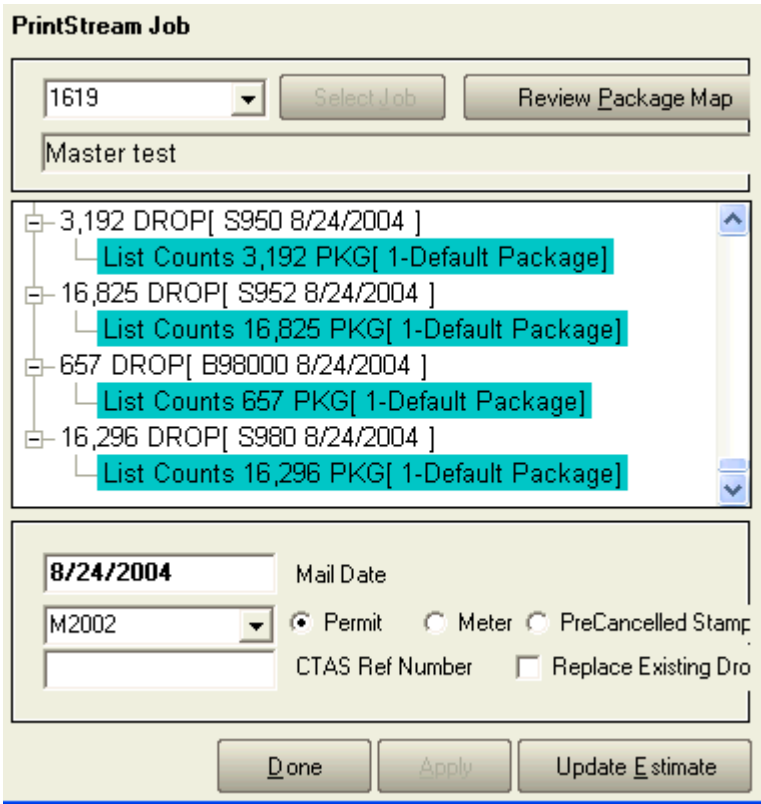


Figure 18 - After you apply your package mappings, you get drop counts on the right panel of the Package Association dialog.

- f. Press the “Apply button”. You may be asked if you want to delete existing drops before continuing. If you answer yes, any drops previously defined will be deleted and replaced with those created during the import. An hour glass will be displayed as the drops are added.
- g. You will now see the drops all mapped out to package numbers. If you wish to update an existing estimate with this information, you can press the Update Estimate button to apply to your PrintStream list counts to the estimate. Press the Done button when the hourglass disappears. If you are not updating an estimate, just press the “Done” button.

h. After the file has been successfully imported, it is moved to a folder you have specified in your PrintStream Windowbook Support Setup screen.

5. Print your Mailing Work Tickets using the drop information you just imported



Post Master & DAT-MAIL™ Operating Procedures

Post Master users can not create a drop file from Mail.dat but can import list counts and statements generated in PrintStream. They can also create statements and export them to PrintStream.

DAT-MAIL™ users can import list counts and statements from PrintStream as well, whether or not the data originated from DAT-MAIL™'s drop export. For DAT-MAIL™ users the following procedures pick up where the DAT-MAIL™ Standard Operating Procedures section left off.

1. Export List Counts to DAT-MAIL™

Because the production process may have involved last minute changes to the drops and their mailing dates and package associations, you can export PrintStream list counts instead of using DAT-MAIL™'s Statement Generation process to create statements. Instead you will export your drop data and DAT-MAIL™ will automatically import this information and turn it into statements which you can make last minute changes to before printing.

For those using Post Master, this is also the first interface point with PrintStream. Post Master will allow a PrintStream user to export list counts and/or statements for final editing and printing. Once the statement data is in Post Master or DAT-MAIL™, PrintStream users can access the 60+ postal reports in these products and use the new query tool for custom reports.

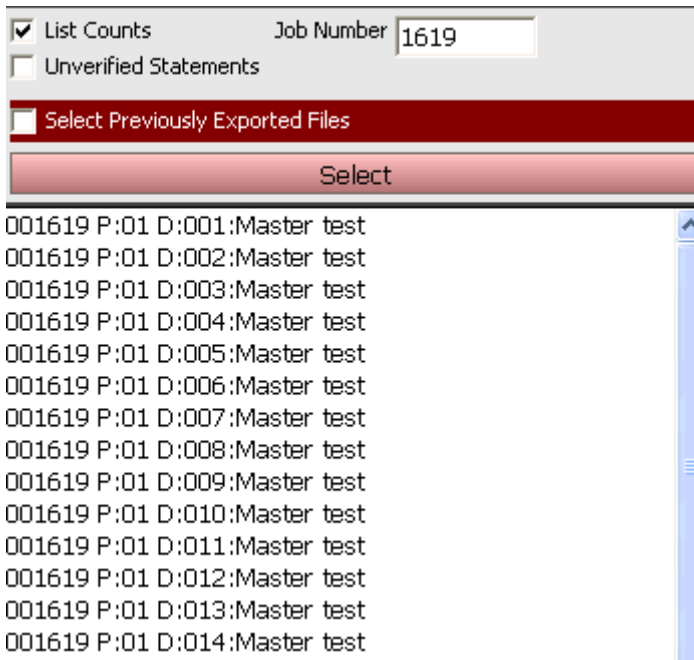


Figure 19 - List Count Export Dialog showing list of drops available for export

a. From PrintStream’s Window Book Support System Menu, select ‘Export to Window Book’. You will get a dialog that prompts you to enter a job number and check off whether you want to export list counts or non-verified statements. If neither box is checked, only verified statements will appear. If you are creating your statements in Post Master or DAT-MAIL™ you would want to check off the “Export List Counts” checkbox and press the Select button to list the drops you will be able to export. If you are exporting statements and want to export the unverified statement to DAT-MAIL™ or Post Master where they could be altered and verified there, check the :”Unverified Statements”:checkbox and press the Select button. Do not check the Select Previously exported files checkbox unless you want to resend previously sent data.

b. To do the export highlight a drop you want to export and double click with your left mouse key. You can also do a ‘multi-select’ (highlight first file to export, left click, highlight last file to export, hold the shift key and left click). When the file(s) are exported, you will get a message that the drop(s) were successfully exported. Future releases of this program may feature a multi-select feature where you can mark multiple drops for export.

2. Use Imported PrintStream Statements or List Counts

In Post Master or the DAT-MAIL™ Statement Printing Program, to see what has been imported by the IMXML utility, go to the statement list and sort by control number. The statements at the end of the list are the most recent. The IMXML utility can automatically consolidate drop ship statements by mail date, permit, job and statement type which eliminates the need to manually consolidate entries

imported from PrintStream. You can now print the statements and 8125's for these drops.

When editing statements you can not change the Job or Client but you can change almost everything else to reflect last minute changes.

3. Verify Statements

You must verify your DAT-MAIL™ or Post Master statements when the postage is final. Normally this is when you have received a round stamped statement from the USPS. To do the validation, go to the 1st Class/Standard Mail statement menu, find the statement you wish to verify and if it is OK as-is, press the blue check mark on the tool bar unless the statement is a consolidated statement.

If the statement is consolidated, press the 'Verify' button on the right of the Consolidated Statement list from the USPS Consolidated Statements menu. Once validated, statements can not be changed, deleted or voided (without further instruction).

In either case mentioned above, the XML output file will automatically be generated and placed into the export folder you determined in your DAT-MAIL™ Statements or Post Master program setup.

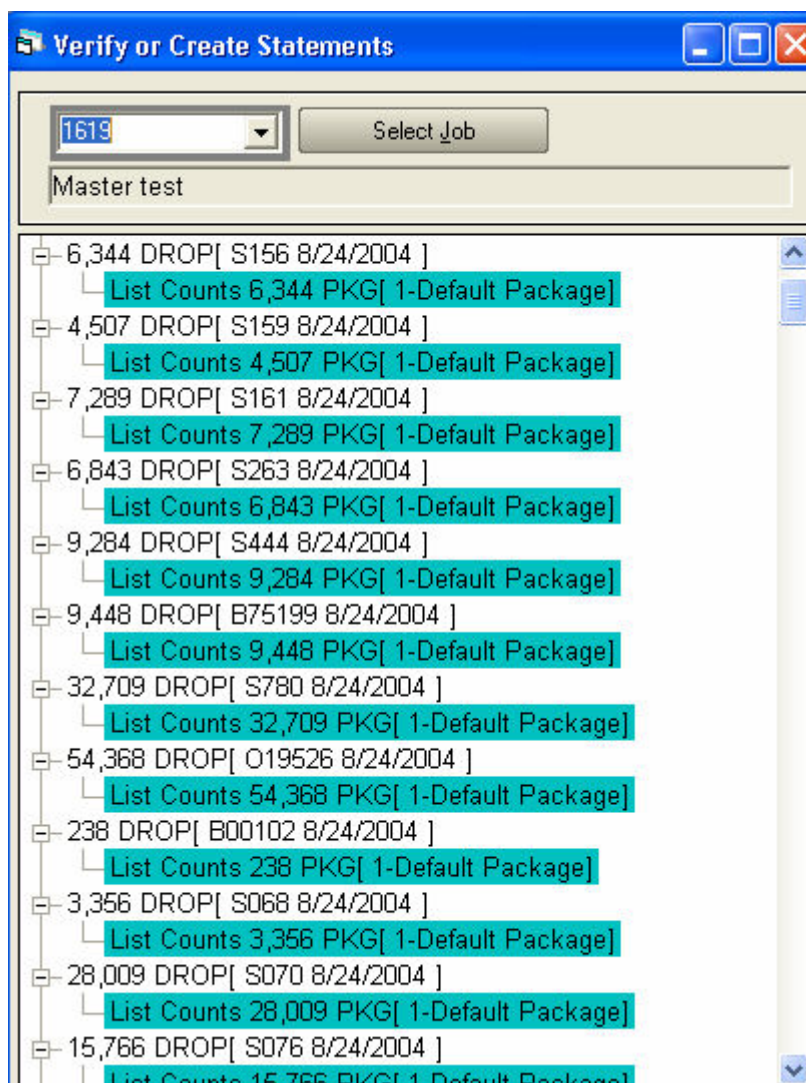
4. Import Verified Statement Data Into PrintStream

Go to the "Select Window Book Exports" option of your PrintStream Window Book Support menu. Look for the entries that start with your job number you want to import statements for followed by "STMT". Double click and verify what you see is accurate then press Apply and then Update.

Other WBI/PrintStream Interface Capabilities

CREATING PRINTSTREAM STATEMENTS FROM IMPORTED LIST COUNTS

If you wish to create PrintStream Statements from imported list counts, go to the “Verify or Create Statements” option of your PrintStream Window Book Support menu. Enter your job number or use the down arrow key to browse PrintStream’s Job list then press the Select Job button. You will see a list of drops. Double click on a drop you wish to create statements for. The process from that point forward is just like creating statement in the Postage Statements section of PrintStream.



PrintStream Interface User Guide

Figure 20 - Creating or verifying Statements in PrintStream for imported list counts or statements



Q & A

QUESTIONS AND ANSWERS ABOUT THE WBI/PRINTSTREAM INTERFACE

Q The Drop Export from DAT-MAIL™ and the XML Import of List Counts from PrintStream would replace DAT-MAIL™'s Statement Generation process. Can this process still be used? (DAT-MAIL™)

A *Yes – You can still use DAT-MAIL™'s Statement Generation but you will not be able to take advantage of any package association you did in PrintStream when importing the drop information. When you import the final statements into PrintStream, you will have to associate the packages again.*

Q Do I have to export drop information to PrintStream? (DAT-MAIL™)

A *No. This information is useful primarily for jobs with a number of drops. If it is a single drop job, it may be just as easy to skip this step.*

Q I do not have a Mail.dat file for a job or I am using Post Master which does not create a 'Drop' file for PrintStream. Can I still pass drop information to PrintStream if I have created a consolidated statement?

A *Yes. If you import a consolidated statement from Post Master or DAT-MAIL™ into PrintStream and it contains drops not previously defined, these drops will be created in PrintStream's drop file. Later when the statement is verified, you can import it into PrintStream and replace previously imported data.*

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