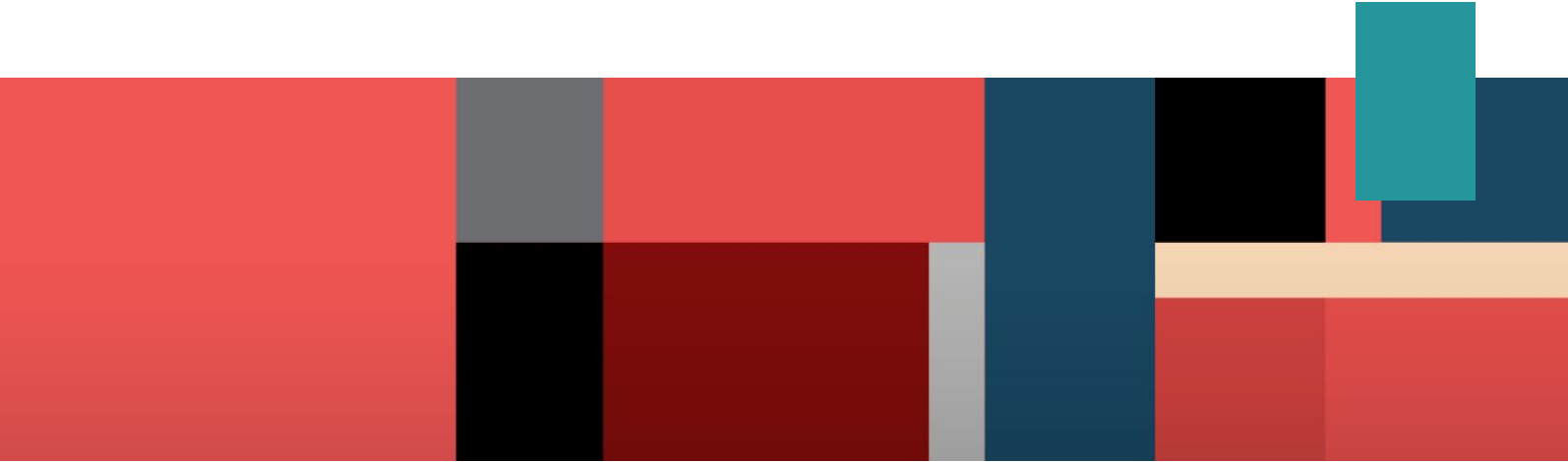




Data Processing Workflow



STANDARD WORK
DOCUMENT

ENPOINTE | 6845 Winnetka Cir, Brooklyn Park, MN 55428



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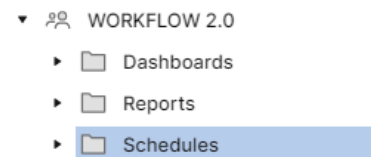
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Job Scheduling

Review Scheduling

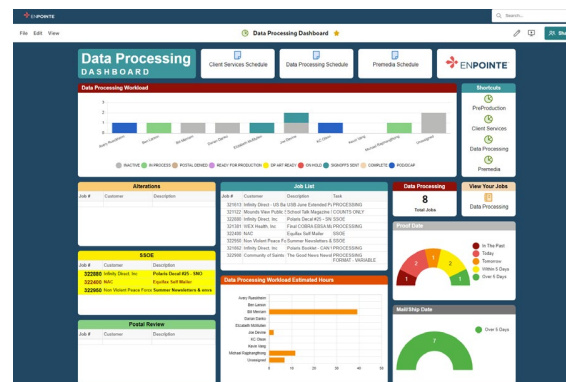
1. Login to Smartsheet
2. Go to the Data Processing Schedule sheet
 - a. WORKFLOW 2.0 Workspace > Schedules folder > Data Processing Schedule



- i.
3. Review jobs list

	MOVE ROW	COPY ROW	DUP... ROW	DP Operator	Status	Task	XMP/E	Additional Instructions	Job #	Customer	Description
1				Bill Meriam	IN PROCESS	ALT			322482	Miracle Ear	Miracle Ear PILOT Program Update for 6/14
2				Avery Ruackheim	IN PROCESS	SSEE			315118	Intermedia	FSC BV-COC-340655 F SC Mix-OLITRE Volume
3				Kevin Vang		PROCESSING FORMAT - VARIABLE			323394	Staples Promotional Products	Dekalb-Asgrow Catalog & Mailing
4				Bill Meriam	IN PROCESS	PROCESSING FORMAT - VARIABLE			323449	Miracle Ear	June 2022 Variable Newsletter Mailing

4. Balance workload based on quantity, estimated hours, and skill level
 - a. Reference Data Processing Dashboard within Smartsheets for graphs expressing workloads



5. Choose an unassigned job
 - a. Prioritize earliest due dates
 - b. Select based on skill level
6. Within the DP Operator column, select the operator accordingly

Posting Files for Production

1. Verify job is approved
 - a. Open Microsoft Outlook
 - i. Locate approval email
 1. Search **Job#**
 2. Locate “APPROVED” within Subject line
 - ii. Confirm that approval email has been received

IMPORTANT NOTE

Do not post files if there is no email.

Verify with CSR & request approval email to be sent

2. Open job folder
 - a. Locate the job folder within [F:\CV1\5664234\Job#](#)
3. Locate press subfolder
 - a. INDIGO OUTPUT
 - b. VWEB
 - c. INKJET
 - d. LASER
 - e. DP100

4. Depending on which press, go to the following locations:

Indigo	Y:\
vWeb	\\10.0.0.62\Job_Submission\uploads
Inkjet	U:\DP-Inkjet
DP100	U:\DP-Inkjet
Laser	\\bp-file01\Groups\InterDeptFolders\DP-Laser

5. Locate/Create subfolder with “**Job#**”
6. Copy and Paste files into subfolder in the desired location
7. Reply to Approval Email
 - a. Include:
 - i. CSR
 - ii. Brooklyn Park OK
 - iii. Lettershop Approval
 - b. Notify that files have been posted.
8. Update job status in Smartsheet to “**COMPLETE**”

Posting Files

Posting Files for CSR

1. Verify the following has been completed:

a. [SSOE](#)

b. [Postal Review](#)

c. [Alterations](#)
2. Determine where files are to be posted:

a. [J:\Explicit_Access\Customer\](#)Data_From_DP\Job#_REPORTS

b. [J:\Open_Access\Customer\](#)Data_From_DP\Job#_REPORTS

i. Server location will be determined by where data was picked up

1. Specified on job ticket within *Covert file(s) Instructions*

Convert file(s) instructions	1) Convert Files posted in here: J:\Open_Access MiracleEar\Data\Pilot
	Delete any non-usa records
	- MAKE SURE THAT ALL LETTERS HAVE THE MAIL CODE LISTED / window of the envelope (or Line 1 of the address block)

3. Locate files to be posted

a. [F:\CV1\5664234\Job#\Job#_REPORTS](#)
4. Verify all reports requested on job ticket are within subfolder

Reports requested	Counts & Postage Undeliverables NCOA Waterfall
Final mail file(s) requested	Yes

- a.
5. Copy all contents

6. Paste into location determined in Step 2

****NOTE**:** SSOE/Postage emails should contain links to locations for where the files are to be posted and specify where the files are to be posted. However, it is still best practice to reference the job ticket to ensure correct locations



Job Initiation

Review Job Ticket

1. Ensure all information needed for data processing is available and understandable

a. Look for missing/conflicting information
2. Review due date/time

a. Alert CSR and/or DP Manager/lead if any concerns
3. Discuss any discrepancies or concerns with first with experienced team member or manager/lead
4. If there are still questions, notify CSR via email

a. Use QUESTION --> **JOB#** | **CUSTOMER** | **DESCRIPTION** in the subject line of the email

i. Cc: DataProcessing-BP

ii. Be concise and as clear as possible

b. If you verbally have discussions, send follow-up email to document the conversation.

c. Request CSR to add any pertinent instructions to job ticket that you feel is necessary

Create Job Folder

1. Run JOB_INITIATOR.bat

a. Enter Job Number followed by the enter key

i. Job folder will be created
2. Select any key to continue

a. Closes the .bat file

Collect Job Resources

1. Pick up data/art

a. Identify location of resources on job ticket

b. Follow the path location and collect all files needed

i. [J:\Explicit_Access](#)

ii. [J:\Open_Access](#)

c. Copy files into job folder ORIGINALS folder

d. Copy any art files into DP_ART folder

e. Save data files into DATA_IN folder

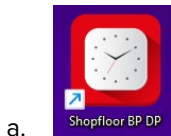
i. Save as delimited (tabbed/comma)



Tracking of Time

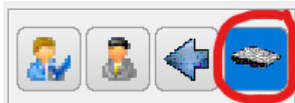
Time Tracking

1. Launch Shopfloor BP DP



2. Login with your credentials

- a. Select the Keyboard for Bar Code Input



- b. Type “E” followed by your employee number:

i.

Scanner In: E:000000										
1	2	3	4	5	6	7	8	9	0	BS
Q	W	E	R	T	Y	U	I	O	P	
A	S	D	F	G	H	J	K	L	#	Enter
Z	X	C	V	B	N	M	Space		Clear	

3. Clock-in/out

- a. Start/End shift
b. Client jobs
c. Non-client jobs/Idle time
d. Lunch Breaks

4. Clock in by clicking Select a Center to Work In button

- a. If non-client job or idle time, select Data Processing 01
- i. Select an Unlisted Job
- ii. Select check mark button
- iii. Select Station
- iv. Select desired cost center
1. QC Non Chargeable



5. SSOE not required unless new data/art files supplied
6. Post files for CSR
- a. [Posting Files](#)
7. Send Email & Notify CSR
- a. To: **CSR**
- b. Cc: Data Processing-BP
- c. Subject:AA EDIT COMPLETE -->JOB | **CUSTOMER** | **DESCRIPTION**
- d. Message: New files located at:
- {Add link to location where new SOF contents are to be posted for CSR}*
8. Update Smartsheet
- a. Status = SIGNOFFS SENT
- b. MOVE ROW = CSR
9. Punch out of job



Additional Alterations

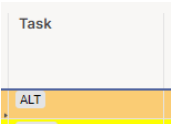
Alteration Requests

1. Confirm alteration is indicated

a. View in Smartsheet

i. Task contains “ALT”

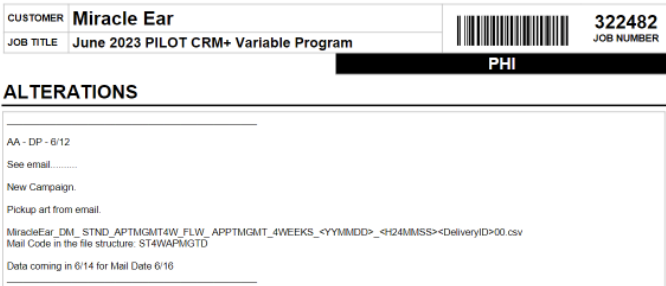
ii. Row should be highlighted orange



- b. View on Job Ticket

i. Locate “ALTERATIONS” section

ii. Review instructions for requested ALT



2. Punch into job

a. Reference: [Time Tracking](#)

b. Select “Charge Type” specified in instructions on job ticket

i. Author – Customer Edit

ii. Rework – Department Edit
3. Perform appropriate steps to complete alteration requested

a. Consult an additional team member for extra guidance if needed
4. Output all new files

a. Reference: [Inspire Designer Output](#)

b. Be sure to update revision number accordingly



- b. If client job, select Data Processing 01

i. Select an Unlisted Job

ii. Type in Job# within the Input #: field

iii. Select check mark button

iv. Select Station

v. Select General Programming 01
5. Clock in/out for lunch breaks

a. Select Start Break to begin break

b. Select End Break to end break
6. Clock out of client/non-client jobs

a. Select Your Started Activities

b. Select desired activities

c. Select flashing “Selected” button

d. Add any comments if necessary

i. Add “SSOE” if performing SSOE for the job

e. Select End button

f. Select “Yes” for another transaction

i. This will allow you to bypass punching in your number every time
7. Clock out of shift

a. Select End Shift button



Preflighting Customer Data

Preflight Data

- Convert data files into delimited files
 - Tabbed-Delimited
 - Comma-Delimited
 - Excel files do not work within Inspire Designer
- Save converted data files within DATA_IN folder
- Open XXXXXX_PREFLIGHT_DATA_REPORT.wfd
 - Update JobInfo Module
 - Add current job number to end of path found within the Default column
 - F:/CV1/5664234/XXXXXX
 - Load in data within INPUT FILE module
 - Within Input file, select the three dots (...) to the right to browse for data
 - Browse and select the data file
 - Within file type, select Auto Detect
 - Open Properties tab
 - Select Auto Detect button
 - Ensures fields are updated and pulled in correctly
 - Open COUNT FIELDS module
 - Select all fields within the Field Converter column
 - Select drop down arrow
 - Select “delete”
 - Select only fields needed to count
 - Update Field Converter column back to “None”
- Run Production
 - Workflow toolbar > Run Production
 - Shortcut = F5 key
 - Update Driver Config to v3 – Input Data Report (PREFLIGHT)
 - Select “Run on remote server”
 - Select Start

Postal Review

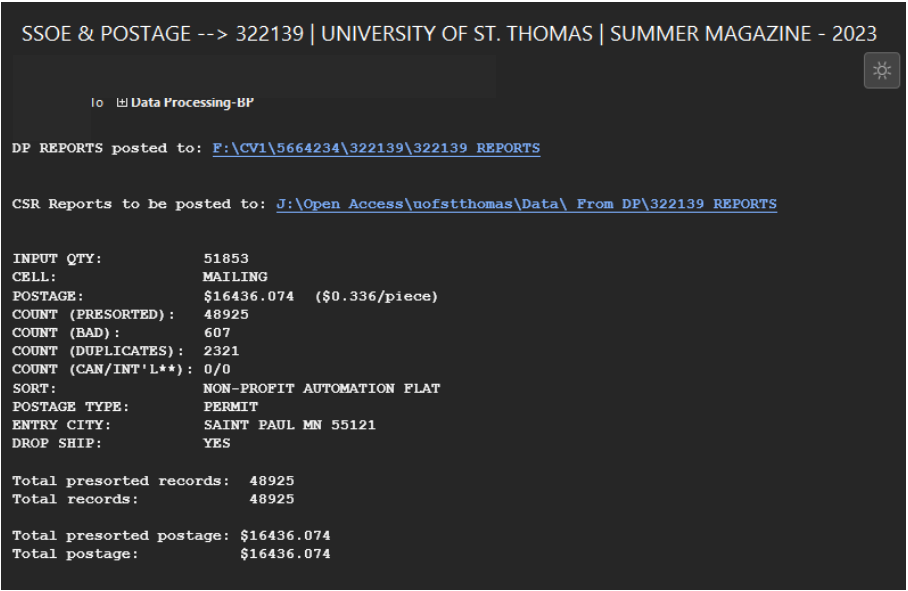
Sending to Postal Review

- Update “Task” field in Smartsheet to “Postal Review”
 - Place files in Postal Review Bin
 - Located in Data Processing Area along East wall
 - Supply final size proofs for review
 - Send postal email
 - Subject:POSTAGE -->JOB | CUSTOMER | DESCRIPTION
 - To:Data-Processing BP
 - Message:DP Reports Link:

***Message should be:
Font: Courier New
Size: 11pt*

*{Add link to job folder’s reports folder where
all SOF contents are stored}*
- CSR Reports to be posted to:
- {Add link to location where SOF contents are to
be posted for CSR}*
- INPUT QTY:
- {Postage Info generated from PADME}*

Example:



- ii. Items to include in email:
 - 1. Link to reports folder containing signoff reports requested
 - 2. Link to where signoffs are to be posted for CSR
 - a. Files should not be posted until after SSOE and Postal Review
 - 3. Postage information
 - a. File output from PADME
 - i. XXXXXX_POSTAGE_INFO.txt
- e. Job jacket with all hard copy signoffs and reports placed into SSOE bin
- f. Job status on Smartsheet updated to SSOE with DP Operator cleared out

Performing SSOE

- 1. Review Data Processing Schedule sheet on Smartsheets
- 2. Update the DP Operator column to the operator that will perform the SSOE
- 3. DP Operator collects job jacket from SSOE bin
- 4. Clock into the job number under the activity code 245051180 (DP File Processing)
- 5. Review SSOE email that was sent out
- 6. Open job folder the job was processed under
- 7. Locate and open the checklist found within the DP_REPORTS folder
 - a. XXXXXX_DP059 Second Set of Eyes Checklist.docx
- 8. Work through the checklist
 - a. Mark off anything completed
 - b. Make notes of any issues/concerns found
- 9. If issues are found, reply to SSOE email with items found and return to original operator
 - a. Original operator to address issues found
 - b. If original operator is unavailable, SSOE programmer will make the necessary changes and continue routing job
- 10. Once SSOE is approved, route to [Postal Review](#)
 - a. *Note:* Some jobs do not need to be postal reviewed.
 - i. [U:\DP-Lettershop\PA_Exemption_List.xlsx](#)
 - b. Place job jacket in Postal Review bin
 - c. Remove name from DP Operator column in Smartsheet
 - d. Update Task from SSOE to Postal Review
- 11. Clock out of job and add “SSOE” within the comments section



- j. Review documents output
 - i. Within job folder, open DP_REPORTS folder
 - ii. Locate files output
 - 1. XXXXXX_PREFLIGHT_COUNT.pdf
 - 2. XXXXXX_PREFLIGHT_DATA.pdf
 - 3. XXXXXX_PREFLIGHT_DIACRITIC.pdf
 - 4. XXXXXX_PREFLIGHT_DIACRTIC_REPORT.txt
 - a. If no diacritics found within data, DIACTRIC files above will not be created.
- k. Review files
 - i. Ensure data integrity
 - ii. If issues/concerns arise, address accordingly
 - iii. Fix/remove diacritics as necessary
 - 1. Inkjet jobs cannot handle diacritics



Create List in BCC

- Launch BCC Mail Manager
- Create New List
 - File > New List... > Use Template > BCC GENERIC JOB TEMPLATE
 - Keyboard shortcut = Ctrl + Alt + N
 - Locate current job folder within the Save New List As window
 - Update file name to be current job number
 - Select “Save”
 - Add any extra fields if needed
 - Once desired fields are added, select “Save Layout”
 - Update List Description
 - JobNumber | CUSTOMER | SHORT DESCRIPTION**
- Import Data
 - File > Import List... > New > Browse
 - Keyboard shortcut = F8 key
 - Locate and select the data file to import
 - Select “Next”
 - Confirm > OK
- Specify fields
 - Drag and drop fields into the appropriate locations
 - Be sure to also add to In Source fields to keep original data
 - GLSORIGID – calculated expression
 - Load
 - Uncheck Current List Only
 - GLSORIGID
 - MailerID – STATIC = 107375
 - IF TRACK & TRACE
 - NO MAILERID
 - Confirm job ticket if another mailerID is to be used instead
 - InRecord
 - Right click > Enter > Source Record
 - InFileName
 - Right click > Enter > Source Filename

SSOE

Second Set of Eyes (SSOE) is a quality check procedure to ensure the job was completed accurately per the job ticket and ENPOINTE standards.

SSOE's will take precedence over full job setups or edits, unless otherwise indicated by DP Management.

Sending to SSOE

- In order to send to SSOE, first make sure the following has been done:
 - All files [output](#) from Inspire Designer
 - SOF
 - STA
 - MR
 - AP
 - SAM
 - Final Dumps
 - Proof Labels
 - Hard copy signoff proofs output
 - At least 1 of each version
 - 1 additional proof, cut down to final size for postal review
 - Color proofs if requested
 - Production reports
 - XXXXXX_Print_FileSplit_Counts.pdf
 - XXXXXX_PRODUCTION_QC_REPORTS.pdf
 - SSOE email sent
 - Basic Template:



Send

To

Data Processing_BP

Cc

Subject

SSOE & POSTAGE -->JOB | CUSTOMER | DESCRIPTION

DP Reports Link:

[F:\CV1\5664234\XXXXXX\XXXXXX REPORTS](#)

CSR Reports to be posted to:

[J:\Explicit Access\Customer\Data\ From DP\XXXXXX REPORTS](#)

INPUT QTY:

0000

CELL:

MAIL

POSTAGE:

\$0000.000 (\$0.000/piece)

COUNT (PRESORTED):

0000

COUNT (BAD):

00

COUNT (CAN/INT'L**):

0/0

SORT:

STANDARD AUTOMATION LETTER

POSTAGE TYPE:

PERMIT

ENTRY CITY:

SAINT PAUL MN 55121

DROP SHIP:

YES

Total presorted records:

0000

Total records:

0000

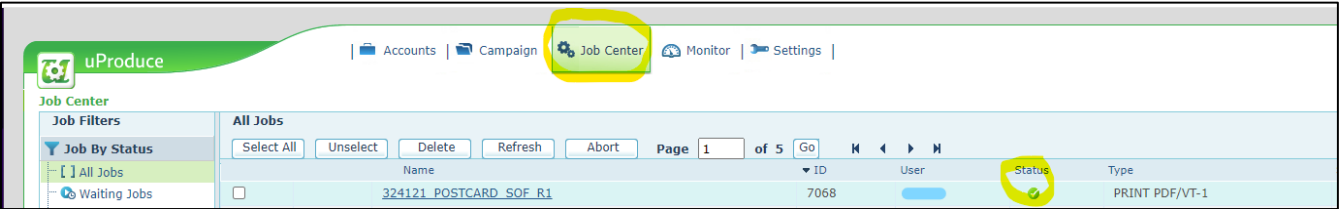
Total presorted postage:

\$0000.00

Total postage:

\$0000.00

- e. Go to Job Center tab in uProduce
 - i. Locate job submitted from previous step
 - ii. Wait for Status column to update to green check
 - 1. May need to refresh the page
 - iii. Once green, select the check mark
 - 1. This will begin to download the file



- 7. Collect & Move output files
 - a. Go to the Downloads folder on your computer
 - b. Locate the files downloaded from uProduce
 - c. Cut and paste them into the current working job folder within the appropriate subfolder

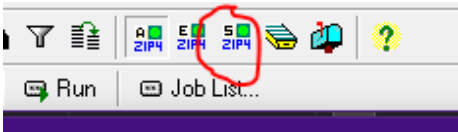


- g. Select “Skip First Record”
- h. Open Options tab
- i. Select “Scan” button to check for longest fields and field assignments for truncation
- j. Select “Auto-Size Output Fields” if needed
- k. Select “Import”
- l. Within Enter Description window, select “Don’t Save”
- m. Update Text File path within the Select Report Destination Window
 - i. F:\CV1\5664234\XXXXXX\DP_REPORTS\ImpRept.txt



Run CASS

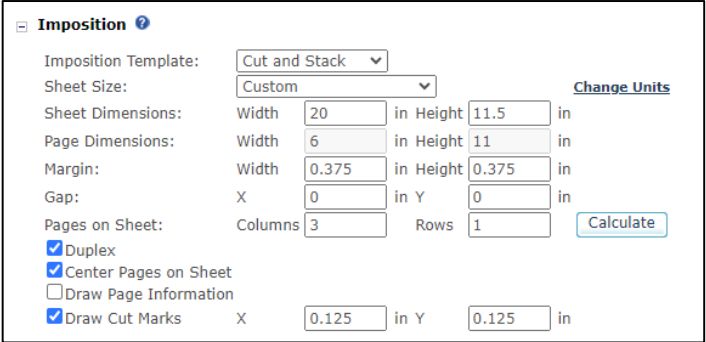
1. Postal toolbar > ZIP+4 Encode... > Encode Selected Records
 - a. Keyboard shortcut = Ctrl + K



- i.
2. Update Printer to Win2PDF within the ZIP+4/eLOT encoding Parameters window
3. Select OK button
4. Update Printer to Win2PDF within PS Form 3553 – CASS/NDI Report – Print window
5. Select OK button
6. Select I Agree within the Dan Prairie Systems LLC window
7. Locate current job number DP_REPORTS folder and save PDF within
8. Review PDF output
 - a. Review percentages found in the National Deliverability Index section at the end of the PDF
 - i. Addresses ZIP+4 matched and standardized: **90+%**
 - ii. Addresses with apt/ste number matched to building record: **60+%**
 - iii. Addresses with correct 5-Digit ZIP Code: **98+%**
 - b. If percentages fall under standard, PADME will fail
 - c. Notify CSR and ask how they would like to proceed
 - i. If okay to continue, make note of lowest percentages
 1. Will need to update option within PADME



- iv. Imposition:
 1. Only update when outputting imposed files for press. Keep disabled if 1-up imposition is needed.
 2. Imposition Template: Cut and Stack
 - a. Reference job ticket
 - b. Update:
 - i. Sheet Dimension (*found on job ticket*)
 - ii. Margin = 0.375" (adjust as needed)
 - iii. Select "Calculate" button
 1. Confirm number up matches job ticket
 - iv. Mark the following:
 1. Duplex
 2. Center Pages on Sheet
 3. Draw Cut Marks
 - a. Values are the bleed (0.125)



Imposition

Imposition Template: Cut and Stack

Sheet Size: Custom [Change Units](#)

Sheet Dimensions: Width 20 in Height 11.5 in

Page Dimensions: Width 6 in Height 11 in

Margin: Width 0.375 in Height 0.375 in

Gap: X 0 in Y 0 in

Pages on Sheet: Columns 3 Rows 1 Calculate

☒ Duplex

☒ Center Pages on Sheet

☐ Draw Page Information

☒ Draw Cut Marks X 0.125 in Y 0.125 in

- d. Select Submit



- ii. Range
1. Select All

a. Update “Split job to:” if needing to split out PDF for press

Range ?

All

From: 1 To: 50

Split job to: 900

records per batch

- iii. Production and Deployment
1. Output Format: PDF/VT-1

2. Output File Name: Custom

a. Job#_BATCH_FileType_RevisionNumber

i. 999999_PKG1_SOF_R1

ii. 999999_MAIL_AP_R1

Production and Deployment ?

Output Format: PDF/VT-1

Display Interactive Elements

Separate file for each record

Generate Flat ADOR Data (CSVX)

Output File Name:

Automatic

Custom: 999999_PKG1_AP_R1

Append Job ID to File Name

ADOR: Opt. Endorsement Line The ADOR value in the first record of each file will be used.

Compression:

No Compression

Compress Output (ZIP)

Create VI Container (VPC) Default DocuSP Configuration

Copy Output To:

No Copying

All to Primary Destination

Separate to Primary and Secondary Destinations

Main output stream to the Primary Destination, all others to the Secondary Destination.

Primary Destination: XMPIE[folder]

Secondary Destination: XMPIE

Copy Assets

Copy Resources

Delete Output After Copying

Job Priority: Normal

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Data Processing Workflow
Standard Work

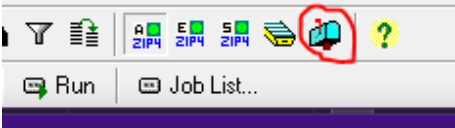


DP050 Rev. 0

Run NCOA

1. Postal toolbar > Data Services > Create Job...

a. Keyboard Shortcut = Ctrl + B



b.

2. Select NCOALink FSP

3. Select Prepaid/Subscription

4. Select Next

5. Continue selecting Next until page 5 within the Data Services Wizard

6. Update PO Number to current job number

7. Select Next

8. Locate your list

9. Choose PAF

10. Select Next

11. Update Class of Mail

a. Select First-Class

b. Select Standard

c. Update Mailing ZIP Code = 55121

12. Select Finish

13. Update Save to*: path to current job folder

a. F:\CV1\5664234\XXXXXX\NCOA\

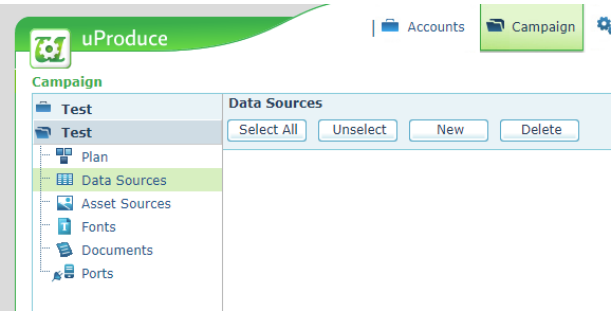
14. Select Next

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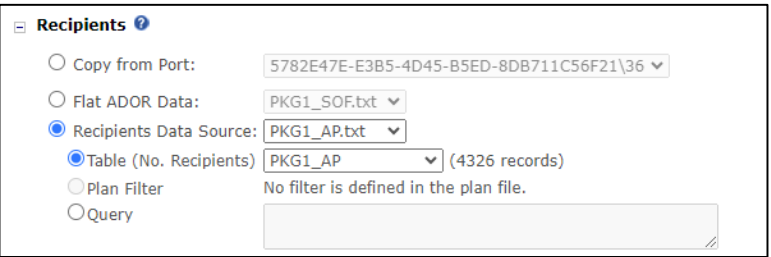
Remove Undeliverables

1. Close list in BCC Mail Manager
2. Run POSTASS.exe
 - a. Enter Job#
3. Open list again in BCC Mail Manager
4. Remove Undeliverables if necessary
 - a. Navigate toolbar > Selectivity
 - i. Keyboard shortcut = Ctrl + S
 - b. Select POSTCASS – AGGRESSIVE within the Choose Selection Set window
 - c. Select “Use” button
 - d. Export List
 - i. File > Export List...
 1. Keyboard Shortcut = F9 key
 - ii. Select New
 - iii. Update Export File Type to Delimited
 1. Unless Excel file is requested on Job Ticket
 - iv. Update path and file name accordingly
 1. F:\CV1\5664234\XXXXXX\XXXXXX_UNDELIVERABLES.csv
 - v. Select Export
 - vi. Repeat, while updating File Type to dBase/FoxPro
 1. F:\CV1\5664234\XXXXXX\XXXXXX_UNDELIVERABLES.DBF
 - vii. Confirm Two Files output
 1. CSV/Excel file
 2. Database file (DBF)
 - e. Delete Records
 - i. Maintenance toolbar > Hide Selected Records
 1. Keyboard shortcut: Ctrl + Del
 - ii. Maintenance toolbar > Delete Hidden Records
 1. Keyboard shortcut: Ctrl + F8

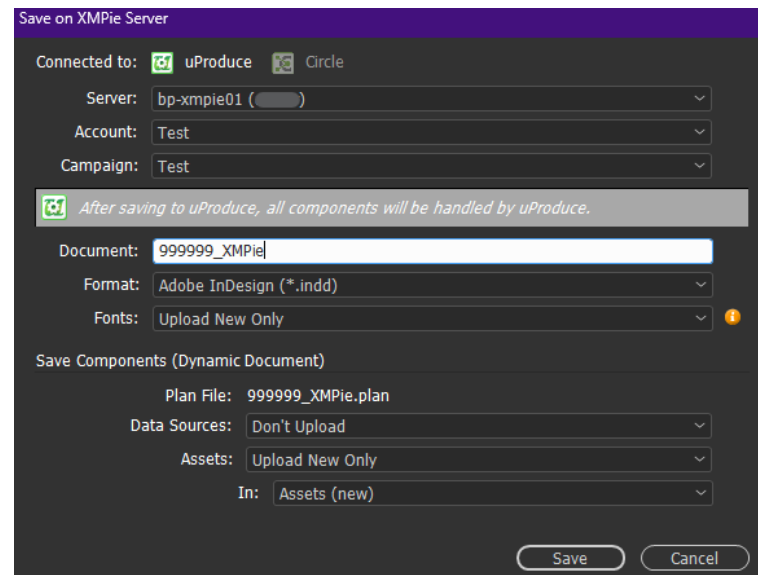
5. Upload data to uProduce
 - a. Return to campaign on uProduce server
 - b. Go to Data Sources section within your campaign



- i. Select New
 - ii. Update Data Source Type to “Separated Values Text”
 - iii. Load in your data file
 1. Either select “Choose File” and locate your data file or if the folder is open in File Explorer, drag and drop onto the “Choose File” button to load file
 - iv. Update delimiter as necessary
 - v. Select Save
 - vi. Repeat for all data sources
6. Output from uProduce
 - a. Go to the Documents section within your campaign
 - b. Select your InDesign file
 - c. Select Process
 - i. Recipients
 1. Update Recipients Data Source to desired data
 2. Select the Table associated with the data source



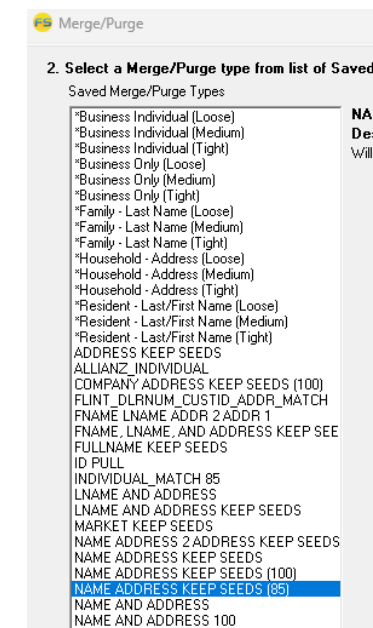
- h. Cycle through records to ensure scripting is correct
 - i. Troubleshoot any errors
 - i. Consult a team member if any guidance is needed
4. Once everything is in check, upload to uProduce
 - a. With InDesign open, go to Dynamic Content → Save to Server...



- b. Update Account to correct customer
- c. Update Campaign to the one created in Step 3. *(Should be current job number)*
- d. Update Document Name to something descriptive for the job
 - i. Can be Job#_XMPie or Job#_Description
 - 1. Examples:
 - a. 999999_XMPie
 - b. 999999_Postcard
- e. Update Fonts to “Upload New Only”
- f. Update Data Sources to “Don’t Upload”
- g. Update Assets to “Upload New Only”
- h. Select Save

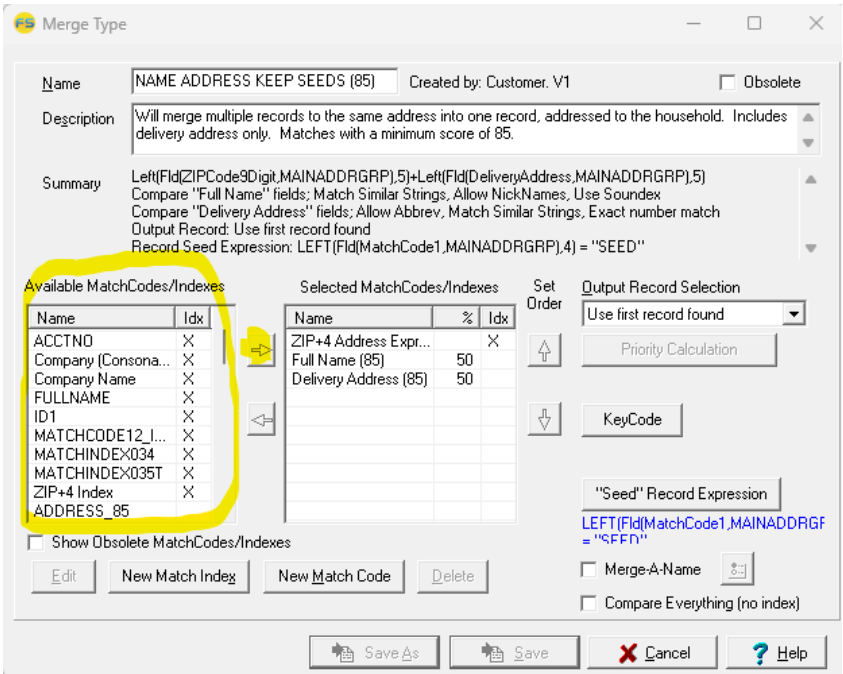
Merge/Purge Duplicate Elimination

1. Review job ticket to ensure dedupe requested
2. Complete CASS & NCOA & remove undeliverables
 - a. [CASS](#)
 - b. [NCOA](#)
 - c. [UNDELIVERABLES](#)
3. Open list in BCC Mail Manager
4. Open Enhanced Merge/Purge window
 - a. File > Enhanced Merge/Purge...
 - i. Keyboard shortcut: CTRL + ALT + Y
5. Select “New”
6. Choose desired Saved Merge/Purge Types
 - a. Generally, choose NAME ADDRESS KEEP SEEDS (85)
 - i. Will merge multiple records to the same address into one record, addressed to the household. Includes delivery address only. Matches with a minimum score of 85
 - b. If ticket specifies “Exact” or “one record per address” choose NAME ADDRESS KEEP SEEDS (100)

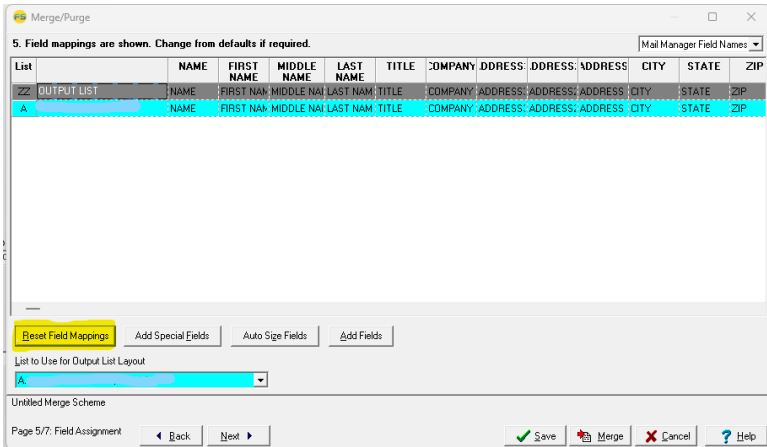


- i

- c. Edit Merge Type if applicable
- i. Add additional MatchCodes/Indexes specified on job ticket to dedupe by



- d.
7. Select List for Merge/Purge
- a. Locate opened list (should be shown bolded within the list)
- b. Update Output File Name
- i. F:\CV1\5664234\000000\000000_M1.dbf
8. Select Next x2
9. Reset Field Mappings



a.

2. Create job on uProduce server
- a. Go to uProduce server (<http://bp-xmpie01/XMPieDashboard/Login.aspx>)
- i. Within Accounts
1. Locate Client folder
2. If Client folder doesn't exist
- a. Select "New"
- b. Enter the Client's name found on the job ticket in the "Name" section
- c. Select all Data Processing operators in the "Share Account" section
- d. Select "Save"
- ii. Once Client folder is located, select and open to Campaigns section
- iii. Within Campaigns
1. Locate Job# folder
2. If Job# folder doesn't exist
- a. Select "New"
- b. Enter the job number found on the job ticket in the "Name" section
- c. Enter the job description found on the job ticket in the "Comments" section
- d. Select "Save"
3. Create InDesign file for XMPie
- a. Locate InDesign file(s) on Premedia server
- b. Copy all InDesign files, link folders, and document fonts folder
- c. Paste into current job XMPie folder
- d. Open all InDesign files
- i. If more than one InDesign file, compare all elements
- e. Merge InDesign documents into one
- i. Use layers to differentiate specific versions
- ii. Try to create a common layer for certain elements
- f. Once InDesign is organized and merged, link the data
- i. Dynamic Content → Link to Data Source
- g. Update variables as needed

XMPie

XMPie Workflow

1. Output data for uProduce
- a. Open List in BCC Mail Manager

b. Define Labels

i. Labels/Reports > Define Labels...

1. Keyboard shortcut: F5 key

ii. Select “New from Template”

iii. Locate and select the template “[XMPie – General](#)”

iv. Within the Label Designer

1. Adjust the number of lines

a. Label > Label Properties

b. Select Printer or File tab

c. Update the Label height to the desired number of lines

d. Select “Apply” and then “OK”

2. Add all variables that will need to be applied within the art/design

a. Locate field within the list on the right side

b. Drag and drop onto label lines

3. Double click the first line with the variable “Intelligent Mail Barcode”

a. Verify the following

i. Mail Class/Piece Type: **{Standard Mail}**

1. Update according to presort settings found on job ticket

ii. MailerID: 107375

1. Unless specified otherwise on job ticket

iii. Serial Number: [IMB_SEQ]

4. Save the label

a. File > Save As...

v. Select the label created and choose “Use”

c. Open Presort Settings

i. Choose desired batch to output – double click

ii. Print > Labels

1. Keyboard shortcut: CTRL + ALT + L

iii. Save in job folder XMPIE subfolder

iv. Update file name to **{BATCH}**

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Data Processing Workflow
Standard Work



DP050 Rev. 0

10. Select Next

11. Specify the location by updating the job number as seen below

a.

12. Select Next

13. Select Save

14. Select Merge

a. New BCC List created with all Dups removed

b. Dups report generated and placed into DP_REPORTS folder

c. DBF created containing all the duplicate records found for reference

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Update Data Casing

1. Review job ticket for casing preference
2. Maintenance toolbar > Modify Selected Records
 - a. Keyboard shortcut: Ctrl + Y
3. Select New
 - a. Update fields accordingly
 - i. Select multiple at a time while holding SHIFT
 - ii. Right click fields > Filter Characters
 - iii. Update Convert Case accordingly
 1. aS Is
 2. Mixed
 3. UPPER
 4. lower
 - iv. Select OK button
 - v. Select Begin button
 - vi. Select Don't Save button

Assign IMB Barcode

1. Close list in BCC Mail Manager
2. Launch the IMBRangeRequester (Do not run if Track and Trace)
 - a. Browse for your **XXXXXX**.dbf file
 - b. Update Job Number = Current job number
 - c. Update Sequence Number Field = IMB_SEQ
 - d. Select Submit File button
3. Open list again in BCC Mail Manger
4. Verify IMB_SEQ populated



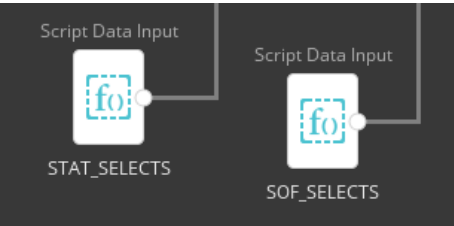
5. Output STAs
 - a. Run Production
 - i. Workflow toolbar > Run Production
 1. Shortcut = F5 key
 - ii. Check “Run on remote server”
 - iii. Update Module to Final_PDF
 - iv. Update Driver Config Profile to v3-Prod Dir Out
 1. This will route files directly to your production folder
 - v. Update Workflow Parameters
 1. File type to process = “STA”
 2. Batches = “ALL” or specified if needed
 - vi. Select Start
6. Output MR/SAM/AP
 - a. Run Production
 - i. Workflow toolbar > Run Production
 1. Shortcut = F5 key
 - ii. Check “Run on remote server”
 - iii. Update Module to Imposed_PDF
 - iv. Update Driver Config Profile to v3-Prod Dir Out
 1. This will route files directly to your production folder
 - v. Update Workflow Parameters
 1. File type to process =
 - a. “MR”
 - i. Make Ready
 - b. “AP”
 - i. Live Production Files
 - c. “SAM”
 - i. Samples
 2. Batches = “ALL” or specified if needed
 - vi. Select Start



Outputting Files from Inspire Designer

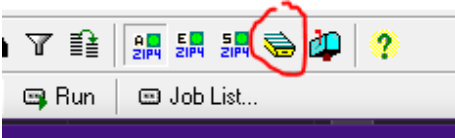
Outputting Files

- Output QC Reports
 - Run Production
 - Workflow toolbar > Run Production
 - Shortcut = F5 key
 - Uncheck “Run on remote server”
 - Select Start
- Load QC Reports that output in DP_REPORTS folder
 - Select STAT_SELECTS module
 - Load in “...STAT_SELECTS.txt”
 - Select SOF_SELECTS module
 - Load in “...SOF_SELECTS.txt”
- Update ImposInfo Module
 - Reference job ticket to update information
 - Sheet Width
 - Sheet Height
 - DutchCut
 - HeadLeft
 - Bleed
 - Center
 - TRUE if Indigo 7500 or vWeb
 - UseHunkler
 - TRUE if vWeb
 - SheetInfo-Rotate
 - If content overlaps sheet information, update to rotate to avoid
- Output SOFs
 - Run Production
 - Workflow toolbar > Run Production
 - Shortcut = F5 key
 - Check “Run on remote server”
 - Update Module to Final_PDF
 - Update Driver Config Profile to v3-Job Report Dir Out
 - This will route files directly to your **XXXXXX**_REPORTS folder
 - Update Workflow Parameters
 - File type to process = “SOF”
 - Batches = “ALL” or specified if needed
 - Select Start



Run Presort

- Postal toolbar > Presort Active List
 - Keyboard Shortcut = Ctrl + P
- Update the presort information accordingly, referencing job ticket
 - Class of Mail
 - Piece Type
 - Mail Stream
 - Piece Dimensions
 - Weight
 - Thickness
 - Length
 - Height
 - Permit
 - Mailing Dates
 - Advanced Settings
 - Pallet Options tab
 - LETTERS MM TRAYS = min 6 max 10
 - LETTERS EMM TRAYS = min 6 max 8
 - FIRST CLASS FLAT TUBS = min 2 max 4
 - STANDARD FLATS = Use Hight (in) = 65”
 - Carrier Route Options tab
 - Check Ignore DDU Minimum
 - Update Min CR Pack Size = 999
 - Mailing tab
 - Full-Service Participation
 - Full Service
 - Basic
 - Select OK button



i. Output SELECTS

- i. Sort “Auto” column
- ii. Save SELECTS within DP_REPORTS folder
- iii. XXXXXX_SELECTS.xlsx
- iv. Send SELECTS email

- 1. To:
 - a. Elizabeth McMullen
 - b. Luis Jimenez
 - c. Anthony Young
- 2. CC:
 - a. Data Processing-BP
- 3. Subject:
 - a. SELECTS --> **JobNumber** | **CUSTOMER** | **Short Description**
- 4. Message:
 - “Please let me know which selects to use.
 - Thank you”
- 5. Attach excel file

- v. Wait for response
 - 1. If Local Entry, no need to rerun presort

j. Rerun Presort settings

- i. Load Last Used settings
- ii. Select OK button
- iii. Select specified SELECTS accordingly

3. Close BCC Mail Manager



Letter Setup

Format for Press

- 1. Select desired GMC template
 - a. F:\CV1\5664234\GMC_TEMPLATE
 - i. VARIABLE_PRINT_FINAL_STEPS_0.0.wfd
 - 1. Indigo, VWEB, Laser
 - ii. INKPREP_FINAL_STEPS_0.0.wfd
 - 1. Inkjet
- 2. Copy WFD into job folder
- 3. Rename with job number at beginning
 - a. XXXXXX_VARIABLE_PRINT_FINAL_STEPS_0.0.wfd
 - b. XXXXXX_INKPREP_FINAL_STEPS_0.0.wfd
- 4. Open WFD
- 5. Update JobInfo module
 - a. Job# and paths
 - b. Customer
 - c. Description
 - d. Operator
 - e. Address Fields
 - f. Stat fields
 - g. Quantities
 - i. Sample
 - ii. Blank Sample
 - iii. Dupes (LIVE)
 - iv. Signoff
- 6. Load in Data
 - a. Open Internal Data Input Module
 - b. Browse and select current job .tsd file created from PADME
- 7. Format Data if needed
- 8. Update Layout Module
 - a. Add Art & Assign Variables specified on job ticket
 - b. Update Page Sizes accordingly
 - c. Locate SHELLS found within DP_ART folder
 - d. Bring into layout and adjust positioning to match client’s original art
 - e. Update fonts accordingly
 - f. Ensure:
 - i. Images are loaded with transparency, native, and place native image in overlay
 - ii. No overprint is set
 - iii. Include fonts/images
 - 1. File > Used Files



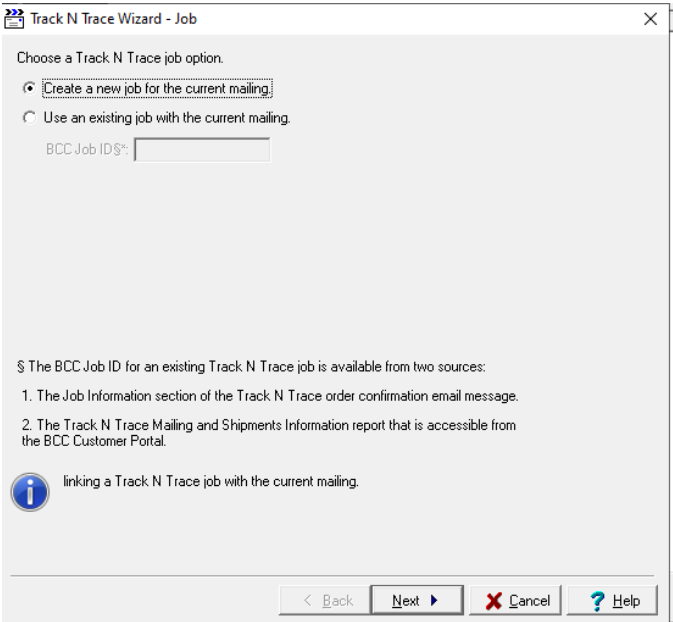
Run PADME

1. Open PADME.wfd found within DP_REPORTS folder
2. Update PADME PARAMS accordingly
 - a. Batch (ALL, RECENT, <BATCH>)
 - i. Separate batches by mail.dats if necessary
 1. mail.dats can only span 30 day
 - b. Mail Date
 - c. Payment method (Permit/meter/stamp)
 - d. MarkRecords (Basic, Full, TnT, TnT-Basic, Parcel, STID_* or None)
 - e. CNT by ZIP: Yes
3. Load in Mail file
4. Load in Undeliverables
5. Load in any dedupe files or suppressed
6. Run Production
 - a. Workflow toolbar > Run Production
 - i. Shortcut = F5 key
 - b. Uncheck “Run on remote server”
 - c. Select Start
 - d. Wait
 - i. Creates:
 1. AP data file
 2. Postage info
 3. Qual reports
7. Troubleshoot any errors
 - a. Locate and open .log files found within PADME_FILES folder
 - b. Troubleshoot any specified errors
 - c. Rerun PADME
8. Review files
 - a. Postage Info
 - b. JSU
 - c. Mail.dat files
9. Post to Dameon if files are correct
10. Close Inspire



Track N Trace (TNT)

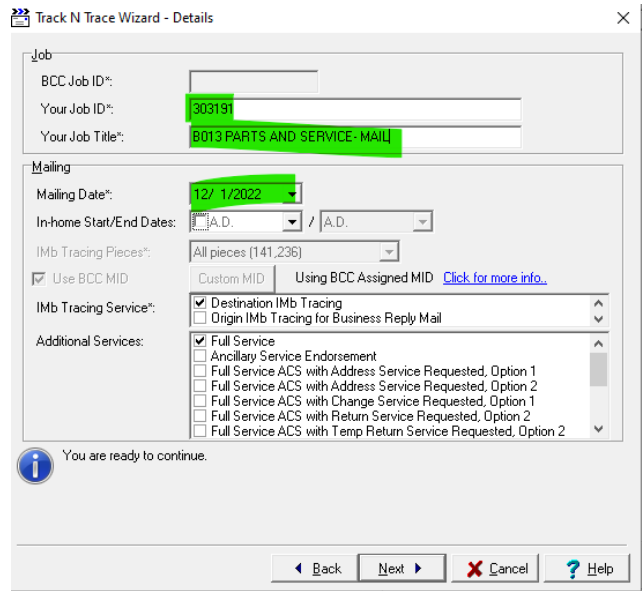
1. Check job ticket postal presort options to confirm Track N Trace.
2. Ensure MailerID field is empty within BCC Mail Manager
3. [Presort job](#)
4. After presorting, reopen the presort screen and select desired batch
5. Select the Track N Trace Wizard
 - a. Tools > Track N Trace
 - i. Keyboard shortcut: CTL + T
6. Select “Create a new job for the current mailing”



- a.
7. Fill out the following on the Detail Screen:
 - a. Your Job ID
 - i. Enter the job number
 - b. Your Job Title
 - i. Enter a description
 - ii. Do not include Customer name
 - iii. If there are multiple batches, add “-{Batch Name} at the end of description to differentiate between them
 1. Do not need to include if only one batch



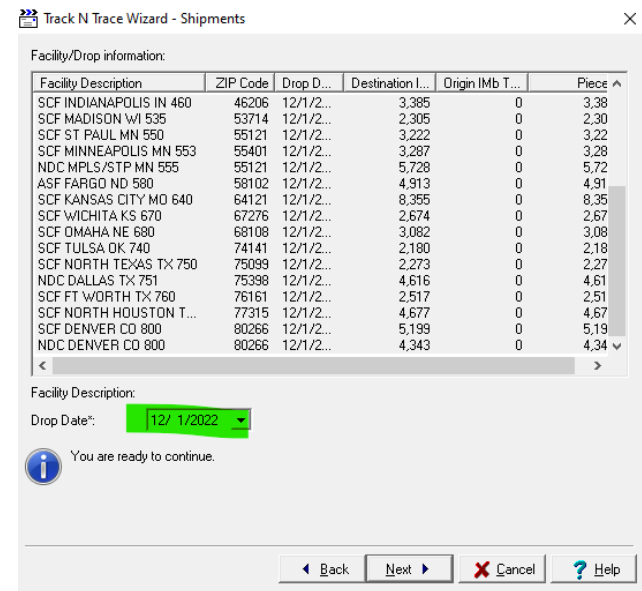
- c. Mailing Date
- i. Enter mailing date found on job ticket



- d.
- e. If piece contains “CHANGE SERVICE REQUESTED” or “RETURN SERVICE REQUESTED”, jump to page 5 for additional instructions

8. Verify if Dropship on the Shipments screen

- a. If not dropship, only one drop date should be available
- b. If job is dropship, select all and update drop date to the same mail date



c.

NonTNT IMpB

Mark Records - IMpB

1. Run [Presort](#) Beforehand
2. Pick up taskmaster script:
 - a. [F:\BCC\FS\Jobs\MARK RECORDS_IMpB_PriorityParcel.mjb](#)
3. Save into [C:\BCC\FS\Jobs](#)
4. Open in UltraEdit
 - a. Find & Replace and update the job number accordingly
 - b. CTL + R
 - i. Find what: 000000
 - ii. Replace with: (Your current job#)
 - c. Save the changes
5. Open job list in BCC
6. Open TaskMaster Job List
7. Run “MARK RECORDS_IMpB_PriorityParcel”
 - a. Should mark IMpB fields needed
 - b. Should output Presort Reports

Create Mail.Dat

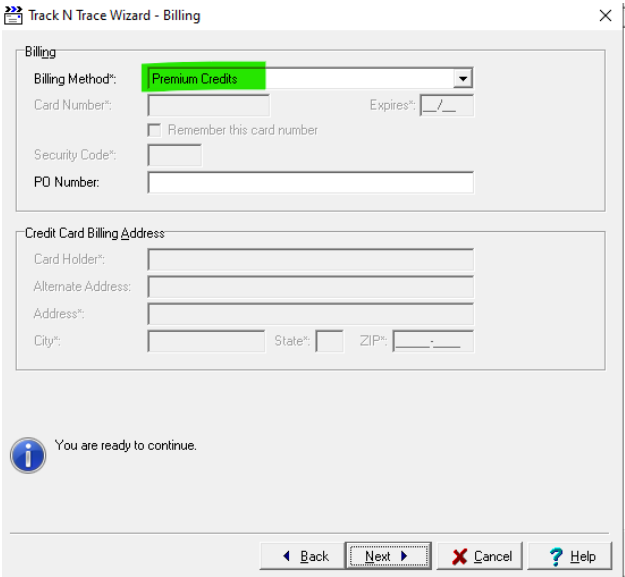
1. Pick up settings
 - a. [F:\BCC\FS\Settings\MailDat\IMPB_MAILDAT.mds](#)
2. Save into [C:\BCC\FS\Settings\MailDat](#)
3. Open job list in BCC
4. Open presort settings
5. Select Saved Presort & Click Use
6. Select Generate Mail.dat file set
7. Load in IMPB_MAILDAT.mds
8. Go through the Mail.dat wizard, updating job# and dates accordingly
9. Copy Mail.dat over to the network
10. Post to Daemon

7. ONTRAC will then process files and repost to FTP
- a. [J:\Open_Access\ontrac\Data](#)
8. ONTRAC will notify via email once completed with quote and indicia’s if requested
9. Pick up data and paste into current job number working folder
10. Continue with setup accordingly

IMPORTANT NOTE

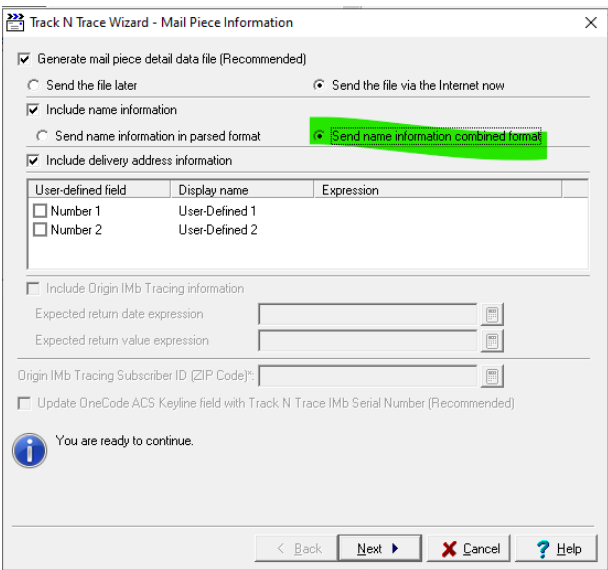
Once DP has provided proofs, the proofs for the Canadian or Foreign records
MUST BE APPROVED BY ONTRAC, before sending proofs to CS.

9. Update Billing Method to Premium Credits on the Billing screen



a.

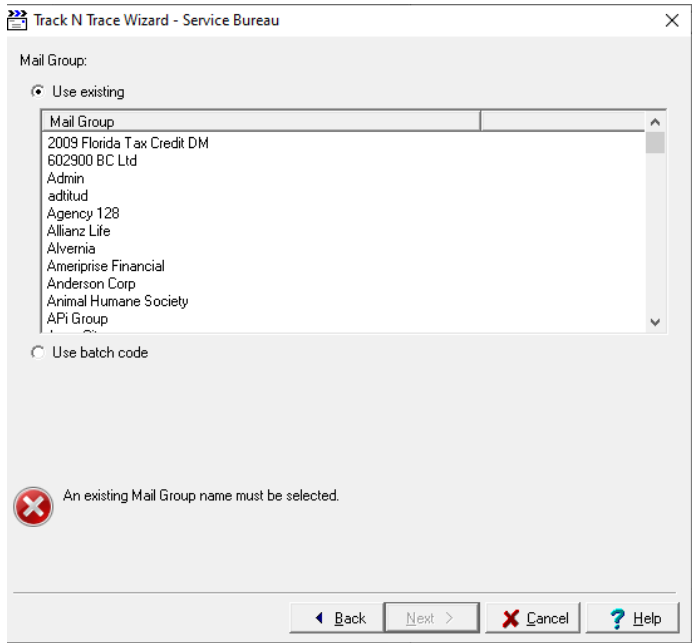
10. Update Mail Piece Information screen
- a. Select “Send name information combined format”
- b. Add in a variable field if applicable within the User-defined field
- i. Select checkbox next to “Number 1”
- ii. Right click
- iii. Add desired variable field



c.

11. Update the Service Bureau screen
- a. Select existing mail group

i. Ticket should list which customer to select in the presort instructions



- b.
12. Select Next
13. If additional batches, return to Step 4

6. Send email to ONTRAC
- To: Tim Schwarzrock (TSchwarzrock@OnTrac.com)

Cc: Data Processing-BP, {CSR}

Subject: **Customer | Description | ENPIONTE Job # JobNumber**

Message:

Hi Tim,

Files posted:

J:\Open_Access\ontrac\From_ENPOINTE\000000\000000_TO_ONTRAC.zip

File names:

000000_FOR_TO_ONTRAC.csv

000000_CAN_TO_ONTRAC.csv

MAILING SPECS

Size: **0x0 letter**

Thickness: **0.00**

Weight: **0.00**

Mailing: **Canada Post Lettermail**

Mail date: **X/XX/XX**

{Indicia's not necessary – ONTRAC to apply once live pieces are received.}

{Please send back appropriate indicia's}

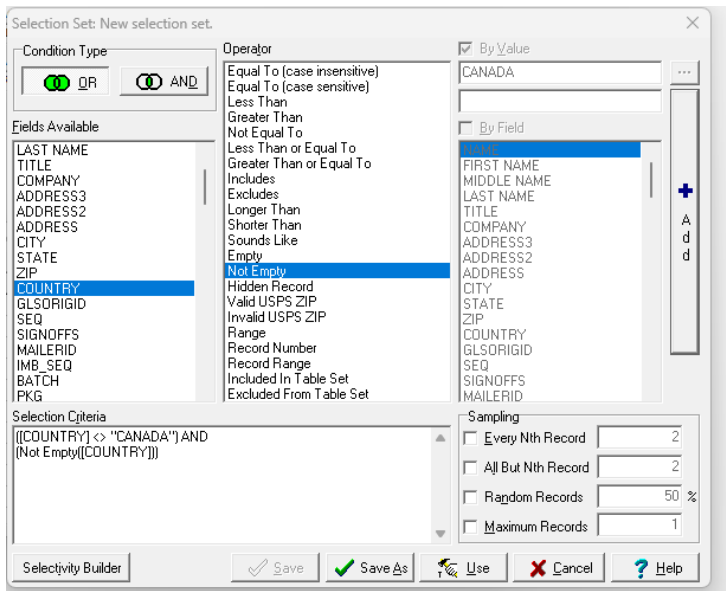
Thank you

Note: The purpose for this is that ONTRAC will reply all which saves DP having to send postage info to CS.

- Included in the subject line of the email is the customer's name and job title (some customers get a better postage rate so customer name is important to include)*
- Include weight, thickness, estimated mail date and how it is mailing or a request to provide the best mailing option (There are times that ONTRAC will ask about the return address, as in, if the piece has one or if it is US or if it is Canada. These will help determine the correct indicia to provide) ***Note, all of this information will be entered into the ONTRAC script on the ticket by Client services.*
- Request indicia or let ONTRAC know the project will meter*
- Include any data split or processing instructions needed*

ii. If Additional Foreign Records

1. COUNTRY <> CANADA
2. COUNTRY = Not Empty



3.

c. Select Use

4. Once selectivity is chosen, export selection

a. File > Export List...

i. Keyboard Shortcut = F9 key

b. Select New

c. Update the following:

i. Export File Type: Delimited (e.g., comma)

ii. This will export the current list to the following file:

1. F:\CV1\5664234\000000\000000_CAN_TO_ONTRAC.csv

a. For Canadian records

2. F:\CV1\5664234\000000\000000_FOR_TO_ONTRAC.csv

a. For additional foreign records

d. Select Export

5. Post files to FTP

a. [J:\Open_Access\ontrac\From_ENPOINTE\000000](#)

i. Create job number folder to post exported data into

ii. Zip files together - 000000_TO_ONTRAC.zip

Track N Trace (TNT) + CHANGE/RETURN SERVICE REQUESTED

1. Confirm with art/instructions on ticket

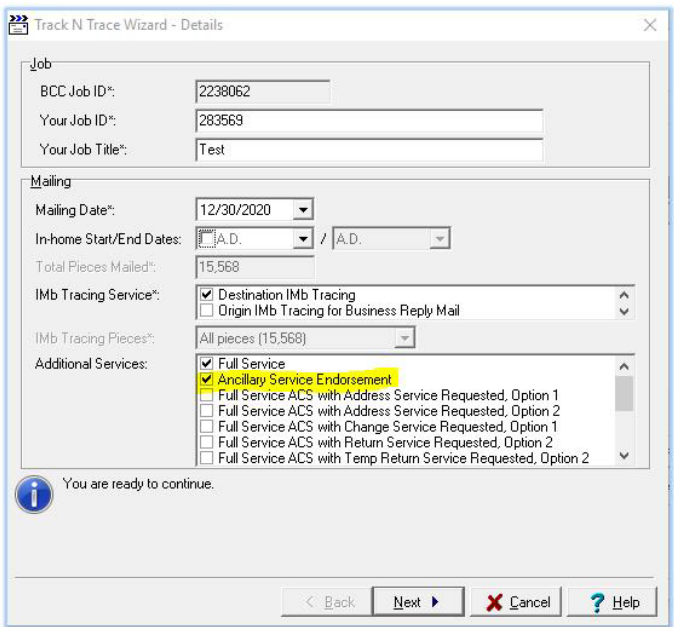
a. Piece contains either:

i. CHANGE SERVICE REQUESTED

ii. RETURN SERVICE REQUESTED

2. Update the following on the Detail Screen:

a. Check “Ancillary Service Endorsement



b.

3. Return to step 8 on page 18, continuing TNT wizard as normal

4. Once TNT wizard is completed, open Labels menu

a. Labels/Reports > Define Labels

i. Keyboard shortcut: F5 key

5. Select “New from Template”

6. Locate template titled “mark records – TRACK N TRACE”

7. Select OK

8. Open Label Properties

a. Label > Label Properties

9. Open Mark Records tab

10. Locate “IMB”, right click, and choose Properties

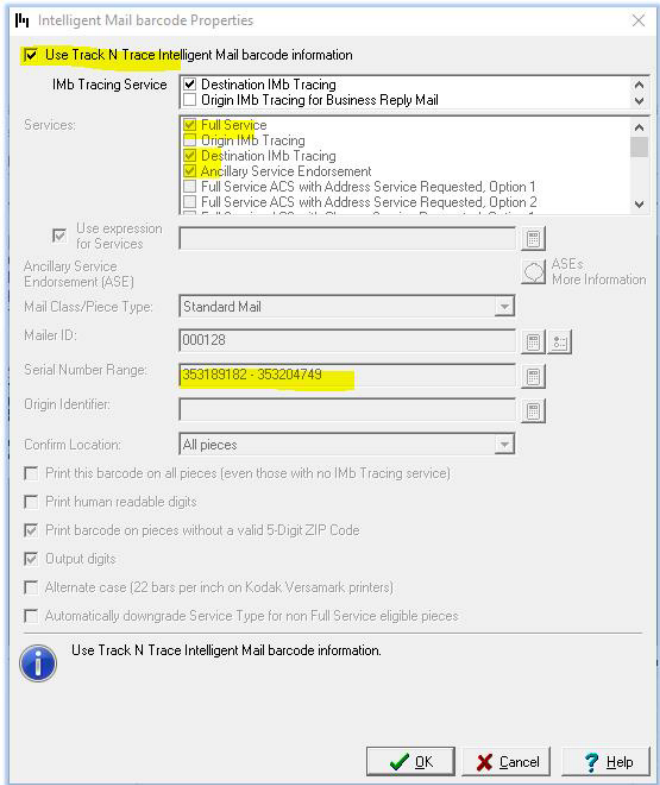
11. Update Properties as followed:
- a. Check “Use Track N Trace Intelligent Mail barcode information”

b. Verify “Ancillary Service Endorsement” box checked in the locked-out Services section

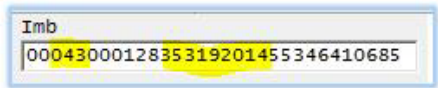
c. Verify the information populated in the Serial Number Range box

i. Cross-reference against the TNT confirmation email

1. Verify correct range is applied



- d.
12. Run Track N Trace Label to generate IMB within BCC
13. Confirm STID and IMB Sequence numbers are accurate



- a.
14. Continue to [PADME](#)

ONTRAC

1. Verify if ONTRAC processing is requested on job ticket

a. Splits out any Canadian and Foreign records
2. Open List within BCC Mail Manager
3. Choose Selectivity to Export data

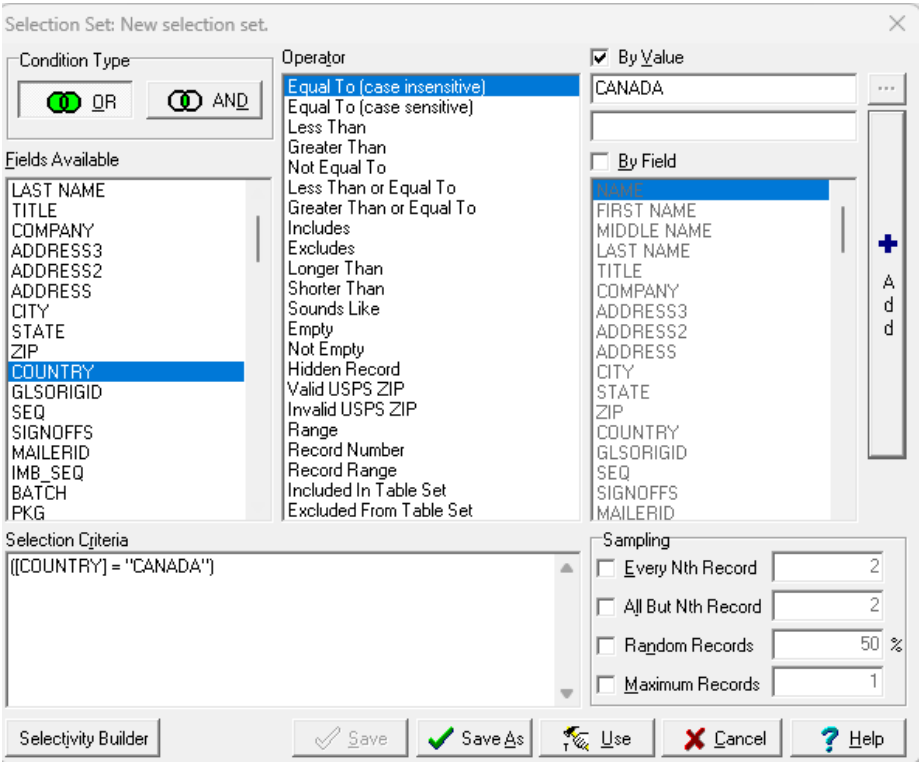
a. Navigate > Selectivity

i. Keyboard Shortcut: CTRL + S

b. Create New selection Set

i. If CANADA records:

1. COUNTRY = CANADA



2.