

# Administrator Guide

Software version 7

Documentation version 7

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# Introduction

As the administrator of the group, you have access to the PostGreen configuration site at <https://admin.post-green.net> thanks to the login details provided by PostGreen.

If you have not received your login details, please contact [support@post-green.com](mailto:support@post-green.com).

The PostGreen administration site allows you:

- To manage your account.
- To create, change and delete the objects used by your users (headed paper, attached documents, etc.)
- To create, change and delete user profiles.
- To create, change and delete users and groups of users.
- To manage the categorisation of your documents.
- To create, change and delete your address and return address blocks.

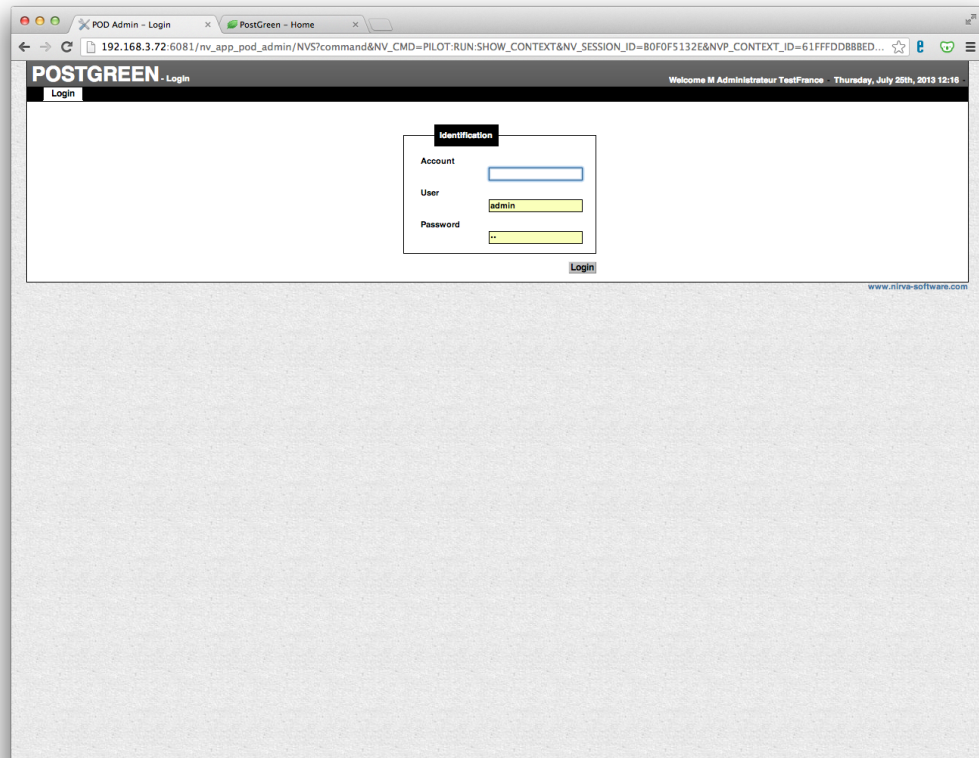
When you assume responsibility for PostGreen, the sections should preferably be configured in the following order:

- Sub-accounts.
- Library.
- User profiles.
- Groups.
- Users.
- Categorisation.



# Identify yourself

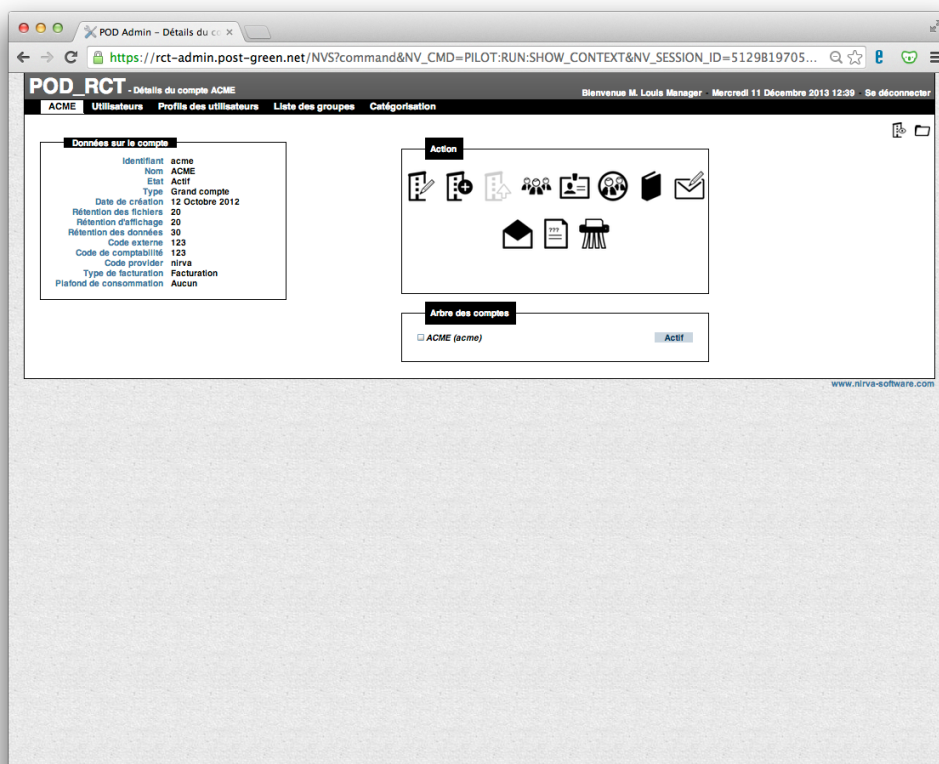
Only a few people should have the role of account administrator in your organisation.

Log in at <https://admin.post-green.net>.



You will enter the main menu with:

- Account data on the left.
- The “top menu” at the top.
- On the top right hand side, 2 icons allow you to load a generic test document  and to visualise the account data at any time .
- In the centre, the icons that represent the essential menu functions.
- At the bottom, the account tree with all the sub-accounts.



All the operations described in this manual must be made in the parent account or in a sub-account (e.g. create a user at the parent account or sub-account level according to membership). If no specification is given at a sub-account level, the latter will inherit the settings of the parent account.


Click on the parent account or one of the sub-accounts to carry out the operations described in the following chapters.

# Create or change a sub-account

A sub-account includes the same information as its parent account. Sub-accounts are generally used to replicate your company organisation, e.g. in departments (marketing, sales, etc.) or regions (north, south, etc.).

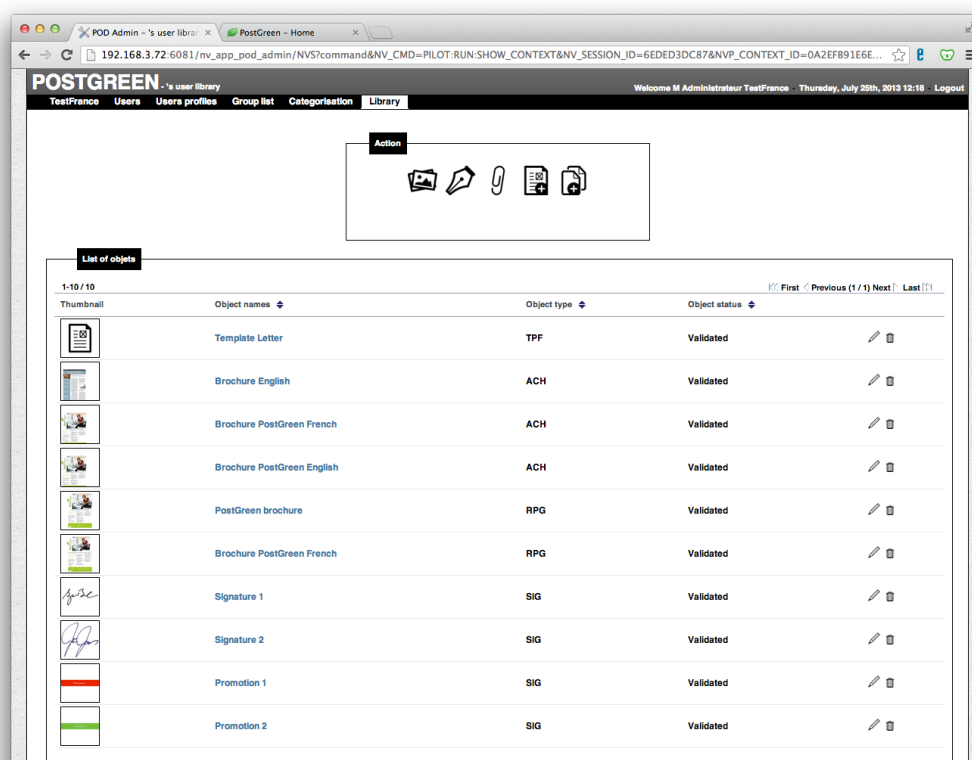
You can create up to 6 levels of sub-accounts.

## Create a sub-account

- From the main menu, click on “Add a sub-account to this account” 
- Fill out the fields that are not pre-filled. Here are explanations for some of the fields:
  - Destination addresses: the country selected determines the country by default if no country is included in the address. For example, if the default country in a (sub-)account is “France” and the user sends a letter without including France on the last line of the address, it will be considered as having France as its destination.
  - Currency: the currency that you want displayed for this account.
  - Type of invoicing. In principle, the sub-account is aligned with the type of invoicing of the parent account.
  - Type of consumption limit. You can specify whether the sub-account has a consumption limit as regards volume (in envelopes) or amount (monetary).
  - Target of consumption limit: specify whether the limit is for the sub-account or for each user.
  - External codes: this information is available in the order information and may subsequently be used, for example, for internal invoicing.
  - Storage period (maximum 9 999 days):

- Saving files: the period during which PDF files are kept in PostGreen.
- Saving for display: the period during which the information will be displayed to users.
- Data storage: the period during which all the data is stored in PostGreen.
- Time zone: set the time zone of the sub-account.
- Impose categorisation: tick this box if you want to hinder the delivery of all documents that have not been categorised.
- Display return address: Tick this box if you would like your return address to be displayed in the window of the envelope just above the contact address. This functionality is only available in some countries (Belgium, Germany, etc.).
- Logo: select the logo that will appear on PostGreen for sub-account users. Accepted formats: PNG, JPG and BMP. The logo should not exceed 35 pixels in height and 200 pixels in width.
- Save.

# Manage libraries



The libraries make it possible to store:

- **Attachments** that may be linked automatically to automated correspondence (e.g. general sales conditions, information letter or company brochure, etc.).
- **Headed paper templates** to replace the headed paper previously used by your company (if not already present in your template documents).
- The **signatures** of the users.
- Template file, for instance Word templates that your employees should use to create a new letter.
- Reprographics files, i.e. static documents such as a brochure, corporate letter head or company presentations that can be printed in a number of copies.

You can manage the library of the account, a sub-account and/or a user depending on your privileges.



All objects are managed in a similar way, except headed paper and reprographics.

## Account library

- Click on an account or a sub-account in the account folder tree.
- Click on the top "Library" menu or on the icon "See the library for this account"




## User library




- Click on an account or a sub-account in the account folder tree.
- Click on the top “Users” menu or on the “See the users of the account” icon .
- Click on the icon  for the user concerned.

## Manage attachments, signatures and template files


### Add an object

- Click on the icon to add the appropriate object:  for a signature,  for an attachment,  for a template file.
- Fill in the fields.
- Add your object by clicking on “Browse” and then selecting the document from your local hard disk or network.
- Save. The object is saved in the library.

### Change an object

- Click on the icon  of the object concerned.
- Repeat the operations described in add an object

### Delete an attachment

- Click on the icon  of the attachment concerned.
- Confirm.

### Tips and Tricks:


To include a document automatically or to propose its use to your users, such as the “brochure of the month”, create an attachment in the library and each month only change the file. The new version of the brochure will become available automatically. To include a new brochure every month, also consider changing your [user profiles](#).

## Manage headed paper


Headed paper is a set of images that replaces the pre-printed paper you put in your printer. The set integrates potentially different images for the first page of the document, the following pages, even pages, uneven pages, attachments, etc...

You may also have multiple sets of headed paper (e.g. by department or geographical location or by type of document).


### Add headed paper

- Click on the icon “Add headed paper” .
- Fill in the fields.
- Import the file in A4 portrait PDF format for each type of page by clicking on “Import” and then selecting the file from your local hard disk or network.
- Save. The headed paper will be saved in the library.

### Change headed paper


- Click on the icon  of the headed paper concerned.
- Repeat the operations described in [add headed paper](#).

### Delete headed paper


- Click on the icon  of the headed paper concerned.
- Confirm.

## Manage reprographics


**Add a reprographics**

- Click on the icon “Add a reprography” .
- Fill in the fields.
- Import the document (PDF of any size) by clicking on “Browse” and then selecting the file from your local hard disk or network.
- Select the compulsory printing options for the reprography (users will not be able to modify them).
- Save. The object will be saved in the library.

**Change a reprography**

- Click on the icon  of the template file concerned.
- Repeat the operations described in [add a reprography](#).

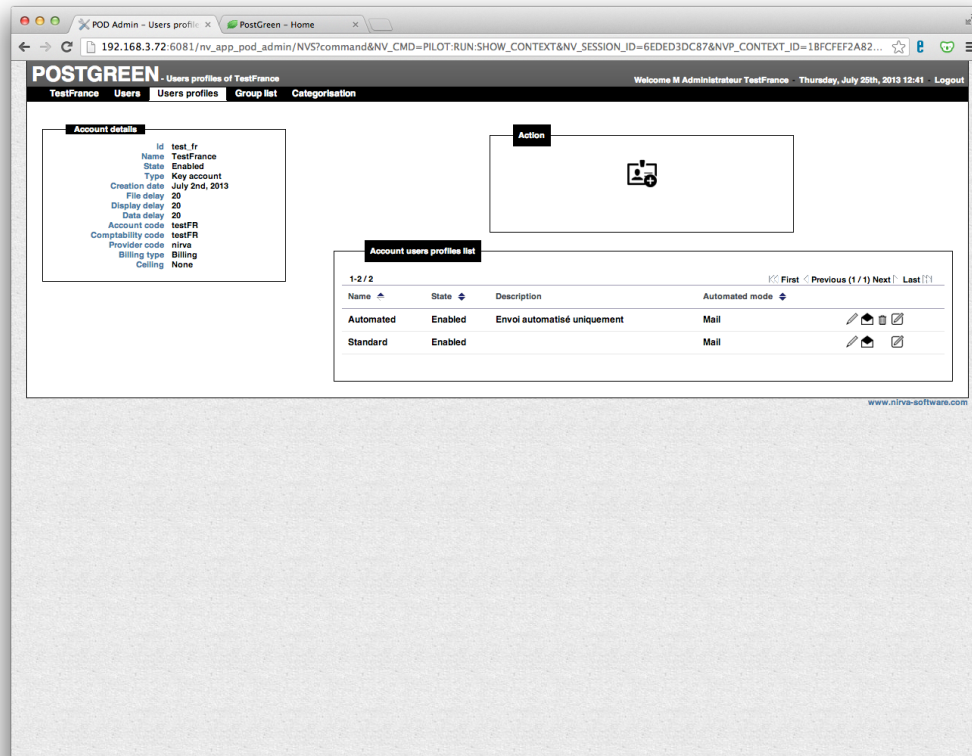
**Delete a reprography**

- Click on the icon  of the reprography concerned.
- Confirm.

# Create or change a user profile



User profiles are used to define the privileges of users and their access to services.

A profile must be associated to each user created so at least create one user profile before creating users.



## Create a user profile

You may create as many user profiles as you wish.

- Click on an account or a sub-account in the account folder tree.
- Click on the top menu "User Profiles" or on the icon "See user profiles for this account" .
- Click on the icon "Add a user profile to this account" .
- Select the desired options.
- Do not forget to make your profile "active".
- Save.

**POSTGREEN** - Add a user profile

Welcome M Administrateur TestFrance - Thursday, July 26th, 2013 12:46 - Logout

TestFrance Users Users profiles Group list Categorisation User profile add

**Account details**

Id	test_fr
Name	TestFrance
State	Enabled
Type	Key account
Creation date	July 2nd, 2013
File delay	20
Display delay	20
Data delay	20
Account code	testFR
Comptability code	testFR
Provider code	nirva
Billing type	Billing
Ceiling	None

**Add a profile**

Account id: test\_fr

Profile name:

Description:

State: ☐ Disabled ☒ Enabled

☐ Attachments allowed

**Use modes for application**

☐ Print via VP: standard mode

☐ Print to VP: automatic mode

☐ Print to VP: delayed mode

☐ Upload documents through the Portal

**Portal services**

Drag and Drop services to adjust the display order in the application interface

☐ Email

☐ Mail

☐ Registered mail

☐ Reprography

Cancel Save

Configure profile, if you check tunnel profile

[www.nirva-software.com](http://www.nirva-software.com)

The selections you make here will have an impact on the user screens: only the functions checked will be visible to them on PostGreen.

#### Tips and techniques:

You can modify the order of the «portal services» by dragging them up or down with your mouse. This order will define the order with which the client sees the different delivery channels on their Web interface.

The following screens define the printing or e-delivery options to send documents in the automated mode through the PostGreen virtual printer. You must define the printing options for the mail, registered mail or email channels.

- Select the “Mail” output channel for example.
- Select the options desired.
- Click on “Next”.

### Important:

PostGreen manages international post deliveries. Some countries have their address block on the right hand side (France, Belgium, etc.) while others have it on the left hand side (UK, Germany, etc.). Last, some can do both (Switzerland, Luxembourg, etc.). The standard positioning of the address block for each country is configured at application level.

PostGreen allows you to automatically manage the positioning of your documents' address blocks based upon the destination country of the document, whatever the originating country. For instance, if a Belgian sends a letter to Germany, the address will be automatically:

- Moved to the left of the document (to be seen in the envelope window) if the option «Address page» mentions «No».
- Systematically placed on an address page on all documents if the option «Address page» mentions «Yes».
- Automatically placed on an address page for documents to Germany only if the option «Address page» mentions «Auto».

- Select the attachments, inserts and headed paper and signatures that will be added to each letter sent in automated mode by users with this profile.
- Save.

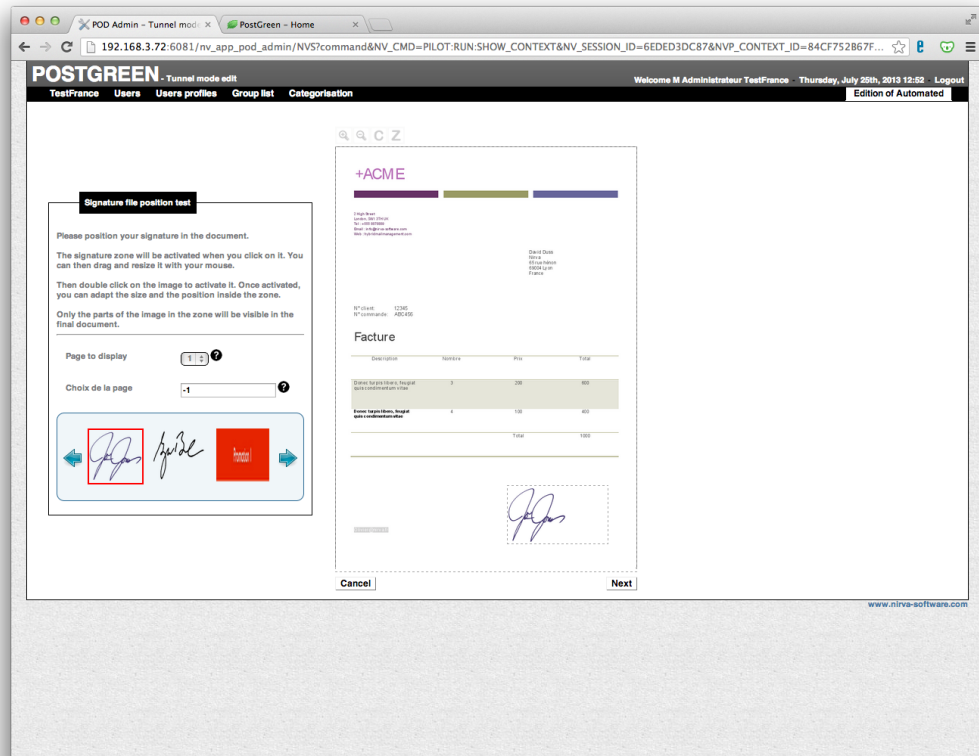
Adapt the operation for the registered letter and email.

## Adding a signature to a document



To automatically insert a signature on a document:

- Click on the «Add a signature» button.
- Upload your document in a PDF A4 format (and not the signature).
- Select your signature on the left.


- Select the page on which you want to appose the signature: 1 for page 1, 2 for page 2... -1 for the last page of the document, ...
- Position it and re-dimension it using the buttons on the top of the document. To zoom in or out, you must select your signature on the document, click on the «C» button and then on the zoom in or out buttons.
- Click on next.



## Change or delete a user profile

- Click on the icon  or  of the profile concerned.
- Repeat the operations described in [create a user profile](#).
- Save.

## Modify the tunnel mode

You can change the automated or tunnel mode, i.e. the way the document will be delivered by clicking on the .

### Tips and Tricks:



You can include signatures but also marketing messages on your document to promote your products or services.




# Create or change a group

A group of users is less “formal” than a sub-account. It may, for example, be used for project participants. You can create as many groups as you wish but a user may only belong to a single group.


## Create a group

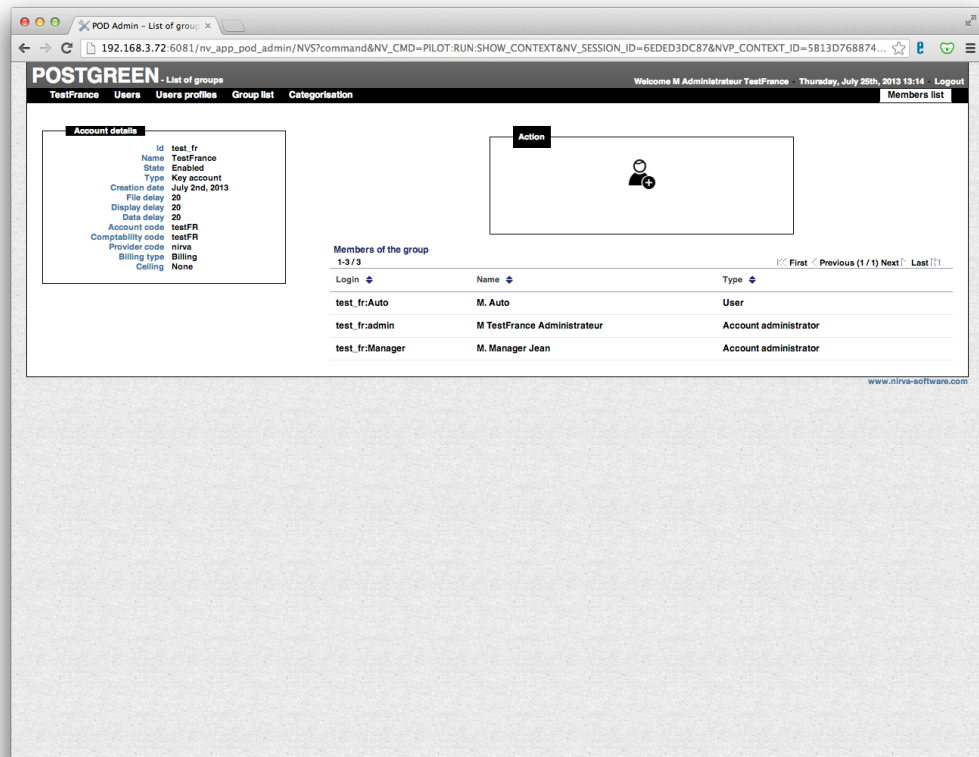
- Click on an account or a sub-account in the account folder tree.
- Click on the top menu “List of groups” or on the icon “View the groups in this account” .
- Click on the icon “Add a group” .
- Give your group a name.
- Associate an internal and external code to it. This information is available in the order information and may subsequently be used, for instance, for internal invoicing.
- Save.

## Change a group

- Click on the icon  of the group concerned.
- Repeat the operations described in [create a group](#).
- Save.

## View the group members

- Click on the icon  to view the members of a group.







# Manage users

The creation of users is generally the final step to complete as it refers to sub-accounts, groups, user profiles and objects from the library.




A user must be created here to be able to use PostGreen.

## Create a user

You may create as many users as you wish.

- Click on an account or a sub-account in the account folder tree.
- Click on the top menu “Users” or on the icon “View the users for this account” .
- Click on “Add a user to this account” .
- Complete the empty fields:
  - Login and password for access to the portal and the virtual printer. The password may be changed in the user preferences (see user guide).
  - The electronic address is obligatory for the method of sending by email and to receive alerts in the case of a processing problem in automated modes. The electronic address may be changed in the user preferences (see user guide).
- Define the type of user:
  - Account administrator: the user may administer all the resources in his account or sub-account.
  - Group administrator: the user may only administer the resources in their group.
  - User: the user only has access to the PostGreen portal.
- Define the use of the application:
  - Administration: the user has access to all PostGreen functions.
  - Order validation: all orders placed will be validated automatically. For an account or group administrator, this gives the right to validate the user orders for his account or group.
  - Send a document via PostGreen: the user may send documents via PostGreen.
  - Manage the **library**: the user may manage their library on PostGreen.
- Select the user **group** (for example project X).
- Select their **profile**.
- Select the portal language for the user. Can be changed in the user preferences (see the user guide).
- Specify the size of the user lists in terms of number of lines. A maximum of 25 is recommended for quick display.
- Save

## Change or delete a user, modify its library

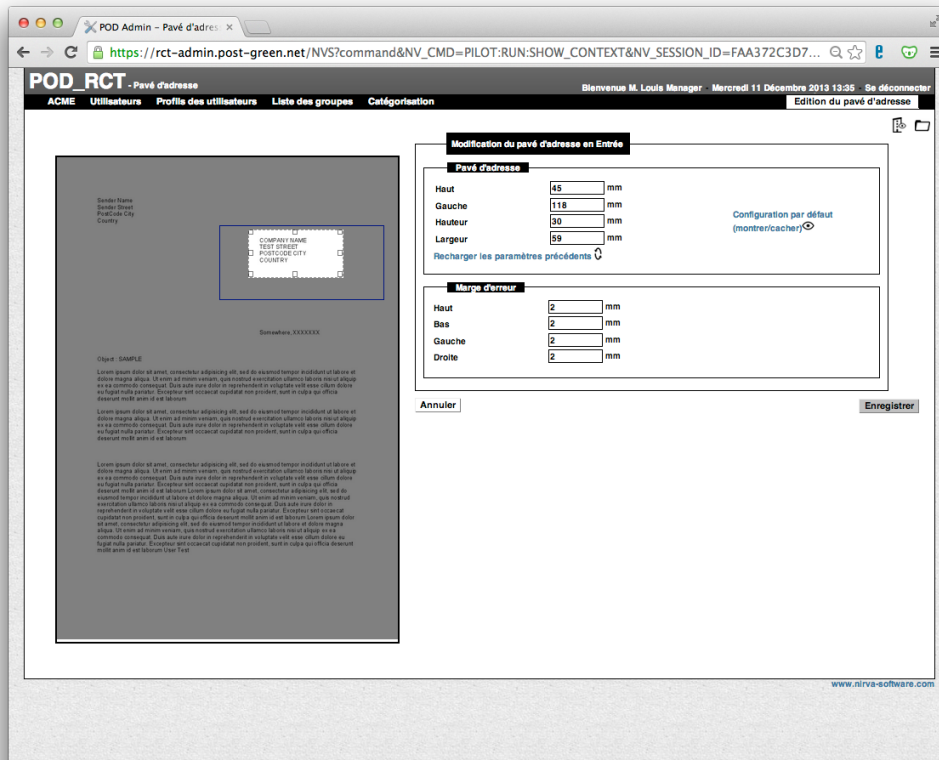
- Click on the icon “Edit user properties”  or delete user  for the user concerned.
- Repeat the operations described in **create a user**.
- Click on the icon  to add or modify the user’s personal library.

# Manage the address block


The position of the address that appears in the envelope window (output address) is defined by PostGreen.

Specify an address detection zone for the account and if necessary for each user: the address block.

Le positionnement standard du pavé adresse est matérialisé par un cadre de couleur autour du document exemple. Ce cadre peut être affiché ou masqué à tout moment.





## Change the address block for an account

- Click on the icon “Edit the address block for this account” .
- Draw the positioning of the address block with your mouse or enter the details for the address block in millimetres starting from the top left corner of the document.
- Enter the error margin in millimetres. This relates to a zone in which no text must be present to validate the address.
- Save


## Change the address block linked to a user

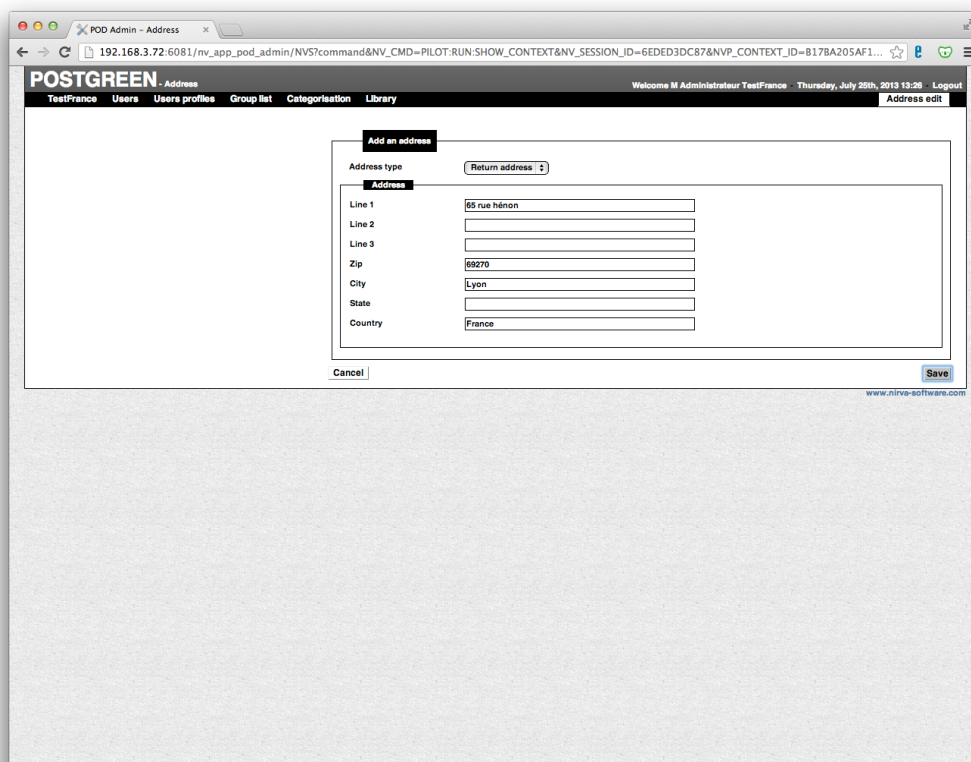
This function is often used to recover the address of the recipient on the documents issued by the business applications and for which the position of the address block is hard to change.

- Click on an account or a sub-account in the account folder tree.
- Click on the top menu “Users” or on the icon “View the users for this account” .
- Click on the icon  and follow the instructions to modify the address block of an account above.

# Manage the account addresses

The account addresses are used to receive the envelopes that have not been distributed and the acknowledgements of receipt of registered letters.

- Click on an account or a sub-account in the account folder tree.
- Click on the icon “Edit the addresses in this account” .
- Select the type of address: main address.
- Enter your main address.
- Select the type of address: return address.
- Enter your return address.
- Save.



## Important:

You absolutely must specify the return address country, even though the latter will not necessarily be printed on the document.

# Manage categorisation

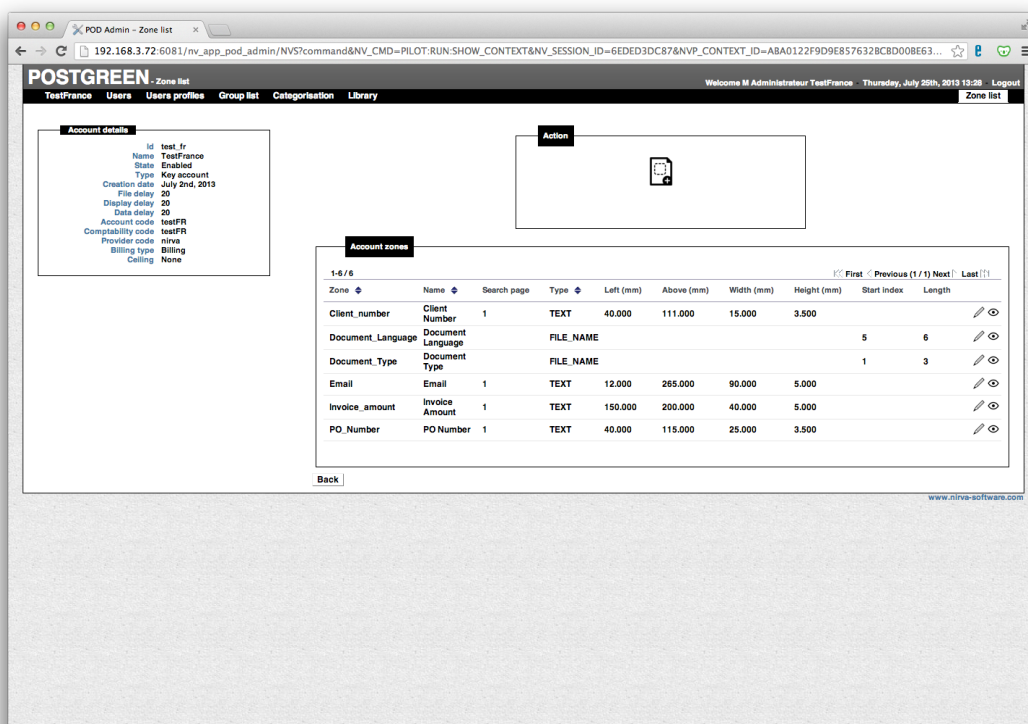
PostGreen allows the categorisation of documents and automatically assigns them a delivery channel (post, email, registered post, etc.) and delivery parameters. This makes it possible, for instance, to send all the credit control letters by registered post for instance, while invoices are sent by post.



The categorisation is done by identifying a string of characters in the document name or one or several strings of characters on one or more of the pages of the document.

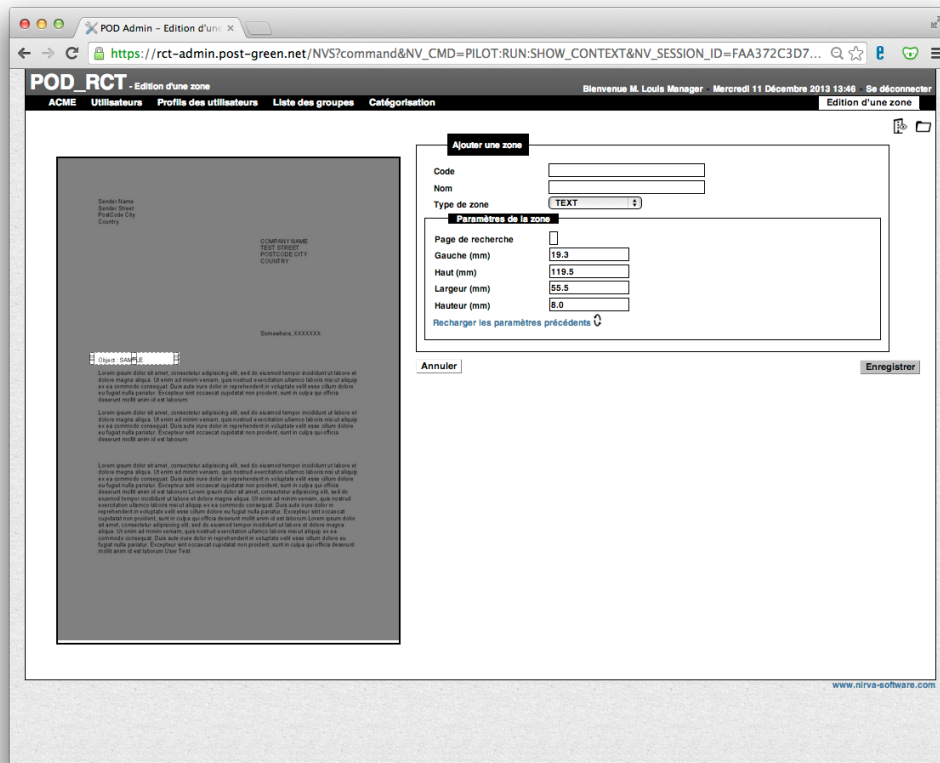
Categorisation is realised in 4 steps:

- Definition of the geographic zones to scan.
- Definition of the strings of characters to search for.
- Definition of the data to extract from the document.
- Definition of how to send this category of document.

## Define the geographic zones to scan




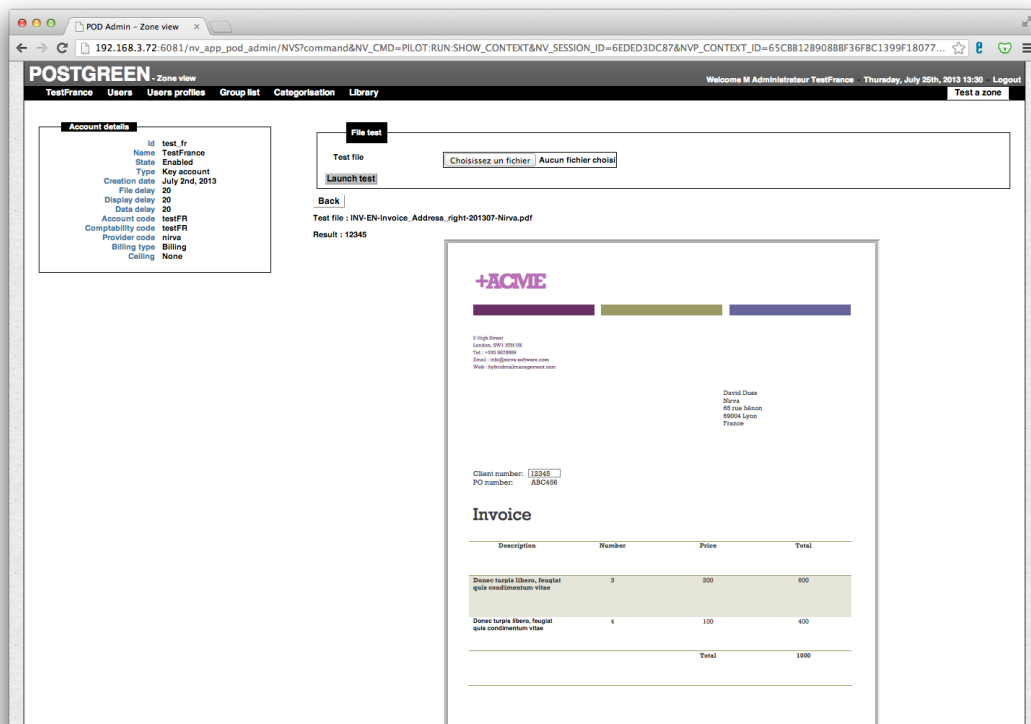
- Click on an account or a sub-account in the account folder tree.
- Click on the top menu "Categorisation" or on the icon .
- Click on the "Add a zone" icon  or "Display the zones" if already created.



- Allocate a code and a name to the zone (e.g. «Document\_name» for the zone displaying the document name)
- To scan the text in the document title:
  - Select the type of zone "FILE\_NAME".
  - Specify the starting position (on the Xth character) in the "Pos" field, the number of characters (on Y characters) in the "length" field.
- To scan the text in the body of the document:
  - Select the type of zone "TEXT".
  - Enter the number of the page to search on and draw the zone to scan on your document with your mouse. You can also enter the geographic position of the zone in which you want to scan text.
- To scan text within the properties of the PDF document (only for advanced users):
  - Select PDF\_Property.
  - Enter the name of the property.
- Save.

### Test your zones

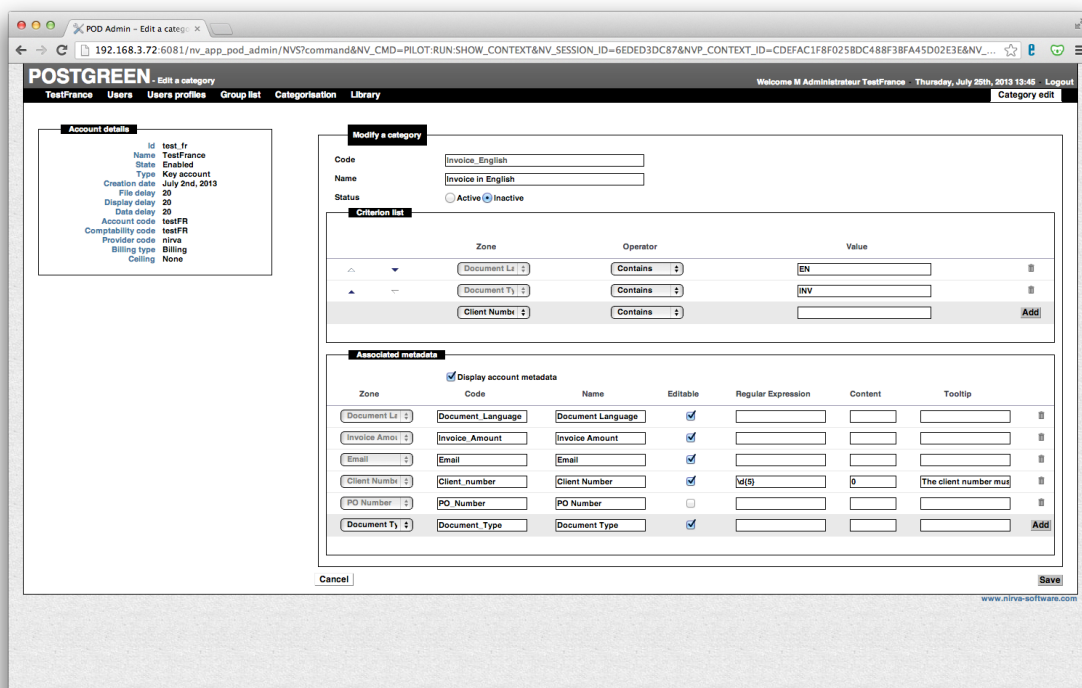
- Click on the icon  in the zone concerned.
- Import a test file in A4 portrait PDF format by clicking on "Browse" and then selecting the file from your local hard disk or network.
- Click on "Launch the test".
- Check the result on the PDF and in the result field. Your zone is also materialised with a grey frame on your test document.





### Important :

PostGreen cannot categorise PDF *images*. To verify whether a PDF is an image, from your PDF viewer, try to select a text zone using your mouse. If the text can be selected it is not a PDF image.

## Define or modify a category



- Click on the top menu on “Categorisation”.
- Click on the icon “Add a category”  or on the icon  of the category to change.
- Give the category a code and a name (e.g. Invoice in english).
- Define the conditions (criterion) that define your category (e.g. if the zone «Document\_Type» contains «INV» and the zone «Document\_Language» contains «EN», then the document is an invoice in English).
- Define the data to extract from the document for this category:
  - Select the zone to be scanned.
  - Indicate a code for the data extracted. This code can be later used in the configuration of the delivery options of the email channel.
  - Define the name displayed for this zone on the user screen.
  - Allow users to edit the data extracted or not by clicking on the «editable» field.
- Save.

### Important :

As soon as a category is «Active», any document satisfying its criteria will be categorised. It is therefore important that you turn on the «Active» button only when the category has been tested and is ready to be used.

## Advanced categorisation options

It is possible to use *regular expressions* to validate the content of extracted data (e.g. make sure that a client number for instance contains 5 digits or that an email address contains the «@» sign). An explanation of regular expressions is available here: <http://www.regular-expressions.info/>


The fields below should only be used by advanced users. They do not need to be filled in to categorise.

Regular Expression	Content	Tooltip
<input type="text"/>	<input type="text"/>	<input type="text"/>

- Regular expression: to edit the chosen regular expression. The meta data will be declared in error by the application if the content extracted from the zone does not validate the regular expression. If the content extracted from the zone validates the regular expression, the field «Content» controls what the meta data will contain. The administrator of the account is responsible to check that the regular expressions are correct with the testing tool provided in the interface.
- Content: The content uses the group mechanism for regular expressions. You must therefore display on this field the group number of the regular expression you want to capture. Put «0» or leave the field empty has the same impact: the entire text of the zone that validates the regular expression is captured.
- Tooltip: It is a message displayed to the user, for instance to notify him that the field data should have a particular format.

## Define how to send a category of document

Once you have activated a category, you can define how to send all documents categorised.

- Click on the icon  of a category to define the associated send parameters.
- Select how you send this category of document (Mail, registered mail or email).

**To send them out by mail or registered mail channels:**

Follow the steps described here.

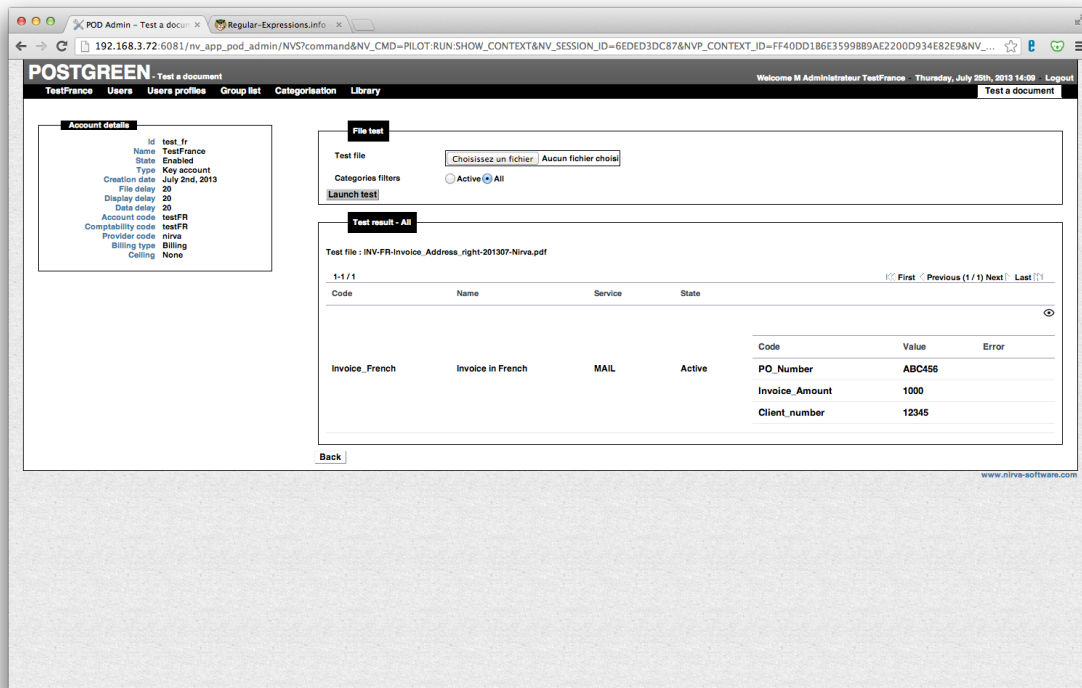
To send them out by email:

The screenshot shows the 'Tunnel mode edit' interface in the POSTGREEN application. On the left, the 'Account details' for 'test\_fr' are listed, including Name, State, Type, Creation date, File delay, Display delay, Data delay, Account code, Compliance code, Provider code, Billing type, and Ceiling. The main area is titled 'Tunnel mode edit' and contains several fields for configuring email output: 'Output channel' (set to 'Email'), 'Production path' (with a sub-section for 'Printing parameters'), 'Recipient location' (set to 'Email'), 'Attachment name', 'Email body' (with a rich text editor containing placeholder text and a signature for 'M. Smith, Director'), and 'Email subject'. At the bottom, there are 'Cancel' and 'Next' buttons.


- Select the «email» output channel.
- In the field «Recipient location», select the meta data which extracts contains the email address of the recipient.
- In the field «Attachment name», redefine if appropriate the name of your document.
- In the «email body», type in and format your text. You can insert some data extracted from a zone by typing in «\${Meta data code}» in the text body - where the «meta data name» is the name of a zone.
- In the «Email subject», type in the subject of your email, which can also include some data extracted from the document.
- Click on «next».
- Specify if appropriate any attachment, e-stationery or signature.
- Click on «save».

## Test your categorisation

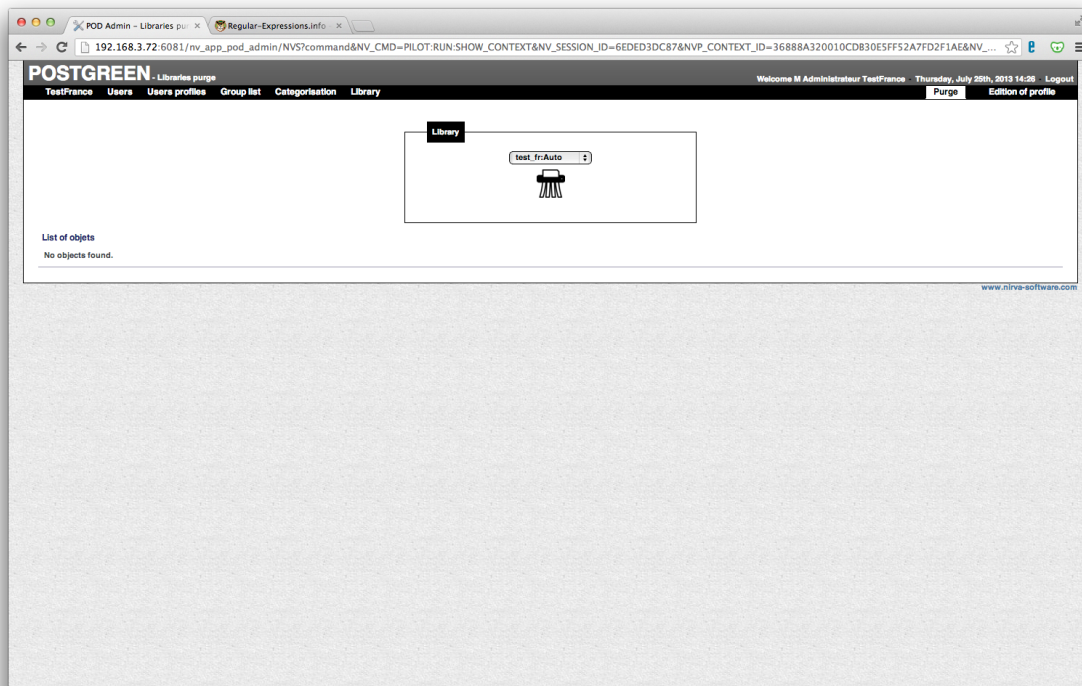






To ensure that your categorisation is operational, test it with a document.

- Click on the top menu «Categorisation».
- Import a test file in the A4 portrait PDF format by clicking on «Browse» and then selecting the file on your local hard disk or network.
- Test all the categories or only those that are active.
- Click on «Launch the test».
- Check the result and the associated send parameters by clicking on the  icon.

# Purge libraries



- Click on an account or a sub-account in the account folder tree.
- Click on the icon “Purge libraries” .
- Select the library (group or personal) to purge in the dropdown box.
- Click on the icon .

# Troubleshooting

In the event of any problems, please contact our support service:

- By email: [support@post-green.com](mailto:support@post-green.com).
- By completing the support form on our website <http://www.nirva-software.com>