

# EnvelopeNow

Objectif Lune Software

## User Guide

[envelopenow.objectiflune.com](http://envelopenow.objectiflune.com)

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# Overview

This PDF documentation was generated on 2013-04-18. You can access the online, up to date version of the documentation here: <http://www.objectiflune.com/Documentation/EN/planetpress-envelopenow-user-guide/>.

PlanetPress EnvelopeNOW is a stand-alone solution that allows Folder Inserter owners to take full advantage of their finishing hardware. You can drive your Folder Inserter's functions automatically and dynamically to reduce manual labour, speed up production time and eliminate human error!

PlanetPress EnvelopeNOW lets you add scan marks like OMR codes and Code 39 barcodes to your existing documents, following the manufacturer's specific guidelines. You set-up the appropriate conditions in the step-by-step wizard to create scan marks that give your own specific instructions to your Folder Inserter. Once you have set-up your project, you can re-use it for an unlimited number of different print jobs.

With PlanetPress EnvelopeNOW, it becomes easy to automatically fold mail pieces of multiple pages, even when the page count is variable! Dynamically add inserts from various trays to your mail pieces based on easy to set-up conditions that follow your existing business rules.

## Contextual help

From any window within PlanetPress EnvelopeNOW, you may hit the **F1** key on your keyboard to obtain contextual help online. Alternatively you can also click the  icon at the top-right of any screen to reach the online user guide on the *Overview* page.

## Icons used in this guide

Some icons are used throughout this guide in order to catch your attention to certain particular information.

**Notes:** This icon shows you something that complements the information around it. Understanding notes is not critical but may be helpful when using PlanetPress EnvelopeNOW.

**Warnings:** This icon shows information that may be critical when using PlanetPress EnvelopeNOW. It is important to pay attention to these warnings.

**Technical:** This icon shows technical information that may require some technical knowledge to understand.

## System Requirements

PlanetPress EnvelopeNOW has the following system requirements:

### Minimum Requirements

- Operating System: Windows XP SP2
- Processor: Intel P4/Celeron;AMD Athlon/Turion
- Memory: 1GB Ram
- Disk Space: 10GB at all times (for temporary and spool files)
- Screen Resolution: 1024 x 768 or higher

## Recommended

- Operating System: Windows 7
- Intel Core i7 / AMD Phenom II Quad
- Memory: 8GB Ram
- Disk Space: 100GB
- Screen Resolution: 1600 x 1200 or higher

## Supported Operating Systems

- Windows XP
- Windows 2003
- Windows Vista
- Windows 2008
- Windows 7

In all cases, both the 32-bit and 64-bit versions of these operating systems are supported.

## Important Notes

**Virtual Environments:** PlanetPress EnvelopeNOW should function in all virtual environments. However, Objectif Lune Inc. has only performed surface testing on VMWare Workstation and cannot guarantee that PlanetPress EnvelopeNOW will function under all virtual environments.

**Terminal Server:** PlanetPress EnvelopeNOW does not require administrative rights and should work under Terminal Services and Remote Desktop connections. However, Objectif Lune Inc. has only performed surface testing on Remote Desktop (RDP) and cannot guarantee that PlanetPress EnvelopeNOW will function under all remote connection tools.

## Performance considerations

PlanetPress EnvelopeNOW was designed to work with typical jobs produced for small, desktop inserters. The number of pages that can be processed through PlanetPress EnvelopeNOW is limited to approximately 50,000 pages and should run such a job, however such a large process could take a few hours to complete before printing starts.

It is estimated that the average job should be around 1000-5000 pages, and jobs of this size should be completed and ready to print within a few minutes. These speeds were calculated on a computer that meets the recommended system requirements.

# Configuration/Cover Page

## Hardware Configuration Sheet

The *Hardware Configuration Sheet* lists all of the project's details. This page is useful for configuring the Folder Inserter according to the project's settings.

To print the *Hardware Configuration Sheet*:

- Open an existing project
- Go to the *Save* tab
- Click on the *Print Info* button. A Web browser window opens up, listing all information for this project.
- Use your browser's Print option to produce a hard copy of the configuration.

# Getting Started

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## Overview

This section will help you get set up to use PlanetPress EnvelopeNOW.

Read on to find exactly what you need to do in order to properly install and activate your new software.

## Package Contents

The PlanetPress EnvelopeNOW box\* contains the following items:

- Your software installation CD.
- Your software license details.

\* Your licenses and installation may have been delivered to you electronically rather than physically.

## Installing PlanetPress EnvelopeNOW

To install PlanetPress EnvelopeNOW follow these steps:

In order to install PlanetPress EnvelopeNOW, you must be logged on as an administrator on the computer.

1. Navigate to the PlanetPress EnvelopeNOW.exe file you downloaded from the Internet or locate the file on the PlanetPress EnvelopeNOW product CD. Once located double-click its icon to launch the installation program. The *Select Setup Language* dialog appears.
2. Select your preferred language and click *OK*.

Version 1.0 of PlanetPress EnvelopeNOW is only available in English.

If your computer is missing prerequisites necessary for PlanetPress EnvelopeNOW to be installed, a dialog appears and indicates that they will be installed.

3. Click **Next** to download and install the required components. Once the installation of the components is completed the *Welcome* screen is displayed.

4. Click **Next**. The *License Agreement* page is shown.
5. When you have read and understood the license agreement, click on **I accept the terms of the license agreement**. Click **Next**.

You must accept the terms of the license agreement to continue.

6. Enter your full name and your organization's name then click **Next**.
7. The *Setup Type* screen appears. Select **Complete** if you want to install all the components of the software, or **Custom** if you want to individually select the components to install. Click **Next**.
8. If you selected **Custom**, the *Custom Setup* window appears. Select the components you want to install then click **Next**.
9. The *Destination Folder* screen displays the drive and folder where PlanetPress EnvelopeNOW will be installed. To install the software elsewhere, click **Change...** and navigate to the desired folder.
10. The *Program Folder* name determines the name that appears in the *Start Menu*. Keep the default name or change the name as desired. Choose whether you want the shortcuts to appear for anyone that uses the computer, or only for the currently logged on user, then click **Next**.
11. Click **Next** to start copying the files and install the software. The *Setup Wizard* starts installing the files. When the copying is complete, the final window appears.  
You may check **Run Update Client now** to check for updates after the installation has finished (recommended).
12. Click **Finish** to complete the installation of PlanetPress EnvelopeNOW.

## Updating PlanetPress EnvelopeNOW

We strongly recommend keeping your software up to date by regularly using the *Objectif Lune Update Manager*.

To access the PlanetPress EnvelopeNOW update manager, do the following:

- Click **Start**.
- Click **(All) Programs**.
- Click the **Objectif Lune Update Client** icon.

When you start the update manager for the first time, a warning window appears to confirm whether you want information about your system to be sent to Objectif Lune. This information is only related to the Objectif Lune products installed on your system. Click **Yes** to accept, **No** to cancel. If you click **Cancel**, the update manager will quit and your software will not be updated.

### To install an update:

If a new update exists for any Objectif Lune software installed on your system, including PlanetPress EnvelopeNOW, the latest version will appear along with its download size and an **Install** button. Click on the **Install** button to start the download and installation of the latest software version.

Once the download exits, the installation will start. Follow the instructions in this guide if you need help with the installation of the update (see [Installing PlanetPress EnvelopeNOW](#))

# Opening the software

To open PlanetPress EnvelopeNOW:

## From your desktop:

Locate and double-click the PlanetPress EnvelopeNOW icon on your desktop.



The PlanetPress EnvelopeNOW icon.

## From the Start menu:

1. Click on **Start**
2. Click on **(All) Programs**
3. Click on the **PlanetPress EnvelopeNOW** folder
4. Click on the **PlanetPress EnvelopeNOW** icon
5. The [Home screen](#) appears.



The PlanetPress EnvelopeNOW Start menu folder.

# Closing the software

To exit out of PlanetPress EnvelopeNOW:

1. Locate and click the button at the top-right corner of the current screen you are on.
2. If you are modifying or creating a job, a dialog asking you to save your work appears.
3. The software exits.

# Trial Period

PlanetPress EnvelopeNOW can run for up to 30 days in a demonstration trial period and will no longer run after this trial period unless it is activated. During this trial period, PlanetPress EnvelopeNOW will cause all outputs to have a watermark.

# Activation

To remove the watermark and continue using PlanetPress EnvelopeNOW, you will need to activate the software.

In order to activate, you will need to have your software license details, and PlanetPress EnvelopeNOW needs to



be installed on your computer.

## To Activate the software:

- Open PlanetPress EnvelopeNOW
- Go to the **Preferences** by clicking on  from any screen.
- Click on the **About** tab.
- Click on the **Activation...** button. The PlanetPress EnvelopeNOW activation screen appears.
- Copy the *Magic Number* from this window by double-clicking on the number, then right-clicking on it and clicking **Copy**. You can also write it down.
- Click on **Web Activation** to get to our activation website.
- Follow the instructions on the website in order to register and activate the software.

# The PlanetPress EnvelopeNOW Home Screen

The PlanetPress EnvelopeNOW home screen displays when starting the application and points to the various features you can use.



The Home Screen

Here are the different parts of the home screen you can click on:

1. **CREATE Project:** Brings you to the *Create Project* screen. See See "Create a new project" on page 17
2. **PRINT Job:** Brings you to the *Print Job* screen. See See "Print your job" on page 25
3. **MODIFY Project:** Opens the *Project Selection* screen. See See "Modify an existing project" on page 24
4. **Open Preferences:** Opens the *Preferences* window. See See "Configuration" on page 27

5. **Help:** Opens the *PlanetPress EnvelopeNOW User Guide* online.
6. **Exit:** Closes the software. See "Closing the software" on page 13

# Create a new project

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## Before you start

### What is a project?

A project is a file that contains all of the preferences and options that you specify for the placement, content and conditions for your job's scan marks. Once you have created a project and saved it, you can use it to print jobs for as long as you want, modify it, or delete it if it's no longer used.

You can create as many projects as you want in PlanetPress EnvelopeNOW, generally one for each type of document you have.

Before you start your new PlanetPress EnvelopeNOW project, please make sure that you have the following items or information in hand:

**Document Sample:** You should either have a PDF that contains a sample of the data your job will process regularly or be ready to capture a job from a printer queue. The sample's page size and orientation should be the same throughout the document and between all your jobs. If your jobs can be of multiple page sizes or orientations, you should create one project for each page size or orientation.

Your job file should contain at least one of every exception on which you apply conditions. For example, if you want to insert a special sheet into each envelope for recipients in California, you should include at least one address from California and one from another state. Make sure your samples appear in the first 50 pages, as PlanetPress EnvelopeNOW will only show the first 50 pages of your document.

**Hardware Configuration:** If you have not already done so, make sure to install and activate the configuration file corresponding to your Folder Inserter. See "Hardware Configurations" on page 28

**Output Printer:** Make sure that at least one printer is installed on your computer. The printer you choose will be where the PlanetPress EnvelopeNOW project will be printed.

**Scan Marks:** Refer to the documentation of your folder inserter to learn the definition and significance of each available scan mark and how they are used.

## Select a configuration file and sample document

A step-by-step animation of this section is available online on <http://www.ppenvelopenow.com/support/>

### Hardware Configuration selection

The Select a Hardware Configuration box shows a list of hardware configurations that have been installed on your system and are currently active. Click on any of the hardware configurations in the list to select it. If your hardware configuration does not appear or if you want to remove hardware configurations you do not use, please refer to See "Configuration" on page 27.

### Fold Type selection

Click on the **Select a Fold Type** box to display a drop down menu that lists the available fold types supported by the chosen hardware. Click on the one you want to use.

### Sample File

Click on the **Select a Sample File** box to display a drop down menu that lists all of the printers installed on your system as well as the **Browse...** option.

- **Browse...:** If your sample job file is a local PDF File on your computer, click on **Browse...** then navigate to the location of the PDF file on your computer.
- **Any printer:** If you do not have a sample PDF ready, you can capture your job on-the-fly. Start by opening your application, then print your job to the PlanetPress EnvelopeNOW printer which was created during installation. Then, select the printer from the sample file drop down menu in this window. The job will be imported, along with any driver settings that you selected when printing (for example, duplex settings).

Certain limitations apply to printer data capture. See See "Technical Considerations" on page 35.

## Identify the mail piece boundaries

A step-by-step animation of this section is available online on <http://www.ppenvelopenow.com/support/>

### Navigating the preview

Starting at this point a preview of your project's output appears. You can navigate through the preview window using the navigation icons or keyboard shortcuts.

#### Panning and zooming

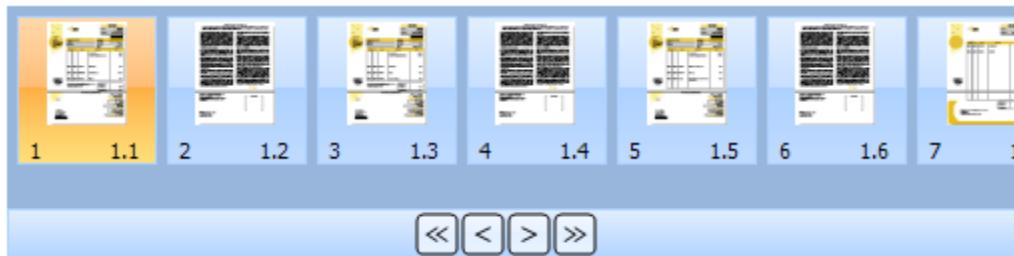
Action	Mouse Shortcut	Icon Shortcut
Zoom in and out of pre-Hold CTRL and use the mouse view	Hold CTRL and use the mouse wheel	Click on Zoom then select a zoom level.
Pan left and right	Hold SHIFT and use the mouse wheel	Click the Hand icon then click and drag the preview.

## Navigating the preview

Action	Mouse Shortcut	Icon Shortcut
Pan up and down	Hold ALT and use the mouse wheel	Use the scrollbars on the bottom and right of the preview.

## Changing Pages

To move forward click on the **Next** button. To move back click on the **Back** button. To move to the first page click on the **First** button, to move to the last page click on the **Last** button. To hide the navigation window, click the **Hide** button.



Use this window to navigate through your job's pages.

## Define Boundaries

Boundaries are the divisions between each of your mail piece (one mail piece being the contents of an envelope). When one mail piece ends and a new one starts, that is a boundary. Boundaries can be defined using a set of different rules depending on the type of job you are doing.

### Variable number of pages

Select this option if you have a variable number of pages for each mail piece. You will need to know if the information necessary to determine when a mail piece starts or ends is on the first or the last page. Both of the options, **The first page** and **The last page**, can be used depending on the location of the information.

### Fixed number of Pages

Select this option if your mail pieces always contain a fixed number of pages throughout your job. When selecting this option, the *The rule will look for...* selector disappears and an input box appears in its place. Enter the exact number of pages each document contains.

### Condition Type

#### Paper type or orientation

Select this option if your mail pieces are separated by a specific paper type, for example by a blue cover sheet that is pulled from a different paper tray in the printer. When selecting this option, a drop-down appears with the supported media types. Click on the option that corresponds to the media type change you want to detect.

For all the selections except *Orientation Change*, an input box appears next to your selection, and should list the media types that are attached to the job. Enter the desired trigger or select one from the list. The exact wording



here depends on the media calls in your printer driver. Please refer to your printer's documentation for more details on what options are available to you.

Some input methods may not support all media type selections. PDFs in particular may be affected by this limitation.

## Text somewhere on the page

Select this option if your boundaries are defined depending on text on your page and whether this text has changed or is something specific. Then, create a region of text on the page by clicking and holding the mouse button in one corner of the region you want to create, then moving to the opposite corner and releasing the mouse button.

It is much more effective to select a single line of text if you can. This can make your process slightly faster if using a lot of conditions on a large job.

The *Selected Region Condition* box appears once you have created a region selection.

Select one of the options from the following:

- **Is Equal To:** The boundary is defined when the area on the page is exactly equal to the contents of the box.
- **Is Not Equal To:** The boundary is defined when the area on the page is different from the content of the box, even by one single character.
- **Contains:** The boundary is defined when the area on the page contains the exact content of the box, at any location in the area.
- **Does Not Contain:** The boundary is defined when the area on the page does not contain the content of the box.
- **Changes:** The boundary is defined when the selected region has changed when compared to the previous page.
- **Is Greater Than:** The boundary is defined when the selected region contains a numeric value that is larger than the number in the box.
- **Is Less Than:** The boundary is defined when the selected region contains a numeric value that is smaller than the number in the box.

Depending on the option you selected it may be necessary or appropriate to modify the content of the text box next to the selection since by default it contains the text within the region selection.

The contents of the region may change in height (for example because of an optional second address line) or width (larger names or addresses), so plan ahead and take a larger area if necessary. As long as no other text is included in your selection, the empty blank spaces are trimmed automatically.



## Combining conditions

### Creating a new condition

To create a new condition, click the  button. Define a new region selection in your preview for this new condition. Select the condition type and modify the content of the text box, if appropriate.

The *changes* condition should only be used as the *last* condition in the set. If it is not the last, it may not function correctly.

### Deleting a condition

To delete a condition, go to the condition you want to delete and click the  button. The condition will be removed.

### Navigating between conditions

To navigate between conditions, click the  and  buttons. The label between the buttons indicates the number of conditions and the currently visible one (for example, 1/2).

### Selecting how conditions are combined

You can combine the conditions in two ways:

- **All conditions are met:** The condition will only become true if *ALL* the combined conditions are true.
- **At least one condition is met:** The condition will be true if *ANY* of the combined conditions is true.

## Define 2-Sided Printing

A step-by-step animation of this section is available online on <http://www.ppenvelopenow.com/support/>

### 1. Settings

This option is used to prepare the job that PlanetPress EnvelopeNOW sends to the printer. It changes two things:

- **The addition of extra pages:** If your job will print in long-edge or short-edge and you select the correct option here, an addition blank page will be added at the end of each mail piece when that mail piece has an odd number of pages. This forces the first page of the next mail piece to always be on the front of a sheet.
- **The position of the scan marks:** If you place your scan marks on the back of the page, using long-edge or short-edge correctly will determine the exact location of the scan marks on the back, so your Folder Inserter knows where to read them. If you do not select the correct option, the Folder Inserter may not be able to see your scan marks.

If your job is single sided and you are printing the scan marks on the front, simply select "None".



## 2. Scan Mark Position

- **Front:** The scan marks will appear on the front side of each sheet.
- **Back:** The scan marks will appear on the back side of each sheet. If you selected "none" in the duplex option, PlanetPress EnvelopeNOW will automatically create a back page containing only the scan marks.

Before you set the Duplex options, make sure you understand where your Folder Inserter can read scan marks, as well as exactly what it will do with your mail pieces. For example on some folder inserters, if you are doing a C-Fold letter and you place your scan marks on the front, the C-Fold will cause the Front of your sheets to be folded inside, thus hidden. On the contrary if you place the scan marks on the front, the C-Fold will cause the Front of your sheet to be outside, thus visible. Consult your Folder Inserter's documentation for details on how to correctly prepare the job for printing.

## Scan Mark Selection

A step-by-step animation of this section is available online on <http://www.ppenvelopenow.com/support/>

The options available in this section depend on the hardware configuration you select in General Settings (see See "Select a configuration file and sample document" on page 18). The Selective Marks tab will only be active if the hardware configuration has any optional scan marks for you to configure. Otherwise, it will be skipped.

For each scan mark, three options are available to determine whether or not it appears on the page when printing:

- **On:** Click on this if you want the mark to always appear on the page.
- **Off:** Click on this if you never want the mark to appear on the page.
- **Condition:** Click here if you want the mark to appear only under certain conditions. When selecting this option the conditions will appear at the bottom of the screen. These conditions behave the same as the Boundary selection conditions. Please refer to See "Identify the mail piece boundaries" on page 18 for details on creating and combining conditions.

Conditional scan marks are always evaluated on each page of your job. However, depending on what feature they control, they may appear for a single page, a single mail piece, or the whole job. This is set in the configuration file. Refer to your Folder Inserter's documentation for more information on how these scan marks should appear.

The options available as well as their default status and ability to be changed varies between hardware, and the description of each is provided by the manufacturer (consult your hardware documentation to learn which options are available to you).

All the scan marks must be set to either of the options before you can continue to the last section.

### Moving the scan marks

In the Preview window, you have the ability to change the location of the scan marks defined in the hardware configuration. The configuration defines not only the size limitations of the scan marks, but also the area where your Folder Inserter can read the scan marks. This area will be shown as a pink highlighted area on your page.

To move the scan marks, simply click on them and hold your mouse button, then move them to a new location on the page. You can move the scan marks anywhere on the page, but of course if you move them outside of

### Moving the scan marks

the highlighted area, your Folder Inserter may not be able to read them.

While Folder Inserters generally have a margin of error and may be able to read scan marks that are placed partially outside of the scanning area, we highly recommend keeping the scan marks inside this area to insure that your document will process correctly and with less possible errors.

## Project Information

A step-by-step animation of this section is available online on <http://www.ppenvelopenow.com/support/>

### Assigned Printer

Click the drop-down list and select the printer where the project will output. The printers in this list are the ones installer on your system. PlanetPress EnvelopeNOW will use the driver settings included in the job file if they are available or use the printer's default settings.

### Name

Specify the name you want for your project. This name will appear whenever you need to select a project, for example when modifying an existing project or printing a job. It is always good practice to give your project a name that you will immediately recognize, such as "Regular Invoice Run on DI350".

If you are modifying an existing project and you change the name, PlanetPress EnvelopeNOW will create a copy of your project with the modifications you just did while keeping the original copy intact.

### Description

These notes will help you detail the project information. PlanetPress EnvelopeNOW automatically generates some information such as the hardware configuration used, the location of the captured file, boundary definitions and duplex settings. You can edit these notes as you see fit. The notes will appear to describe the job whenever you print a job from the home screen.

Click on **Reset Description** if you want to re-create the original description from your project information.

### Finish Up

Click on **Preview** if you want to preview what the output will look like. This creates a temporary PDF of a maximum of 50 pages, with the scan marks and all other settings from the project.

Click on **Print Info** to display a *Hardware Configuration Sheet* that lists all of the project's details. This page can be used to configure the Folder Inserter and can be printed from your Internet browser when it opens.

Click the **Save** button to save and close the project when you are done.

For ease of use, PlanetPress EnvelopeNOW always saves your projects in the same location which cannot be modified.

# Modify an existing project

## To modify an existing project:

- Click on the **Modify Project** button on the *Home Screen*.
- In the *Project Selection* screen, click on the project you want to modify
- Click on the **Open Project** button.

When project is open, the same window as the *Create Project* window is displayed.

However, you can click on any of the tabs in the left in the order you prefer to make the necessary changes.

- Once you are done with the modifications, go to the *Save* tab, and click on **Save**.

## To create a copy of an existing project

You can easily create a new project based on an existing one by opening an existing project.

- Open your existing project.
- If necessary, make changes to the project.
- Go to the *Save* tab.
- Change the name of the project.
- Click on **Save**.

A new project with the new name will be created and includes the modifications you made to the original project (if you made any changes).

# Print your job

## Choose your input file

Click the Select a Job File box to display a drop down menu that lists all of the printers installed on your system as well as the *Browse...* option.

- **Browse...**: If your sample job file is a local PDF File on your computer, click on **Browse...** then navigate to the location of the PDF file on your computer.
- **Any printer**: If your sample is coming directly from an application, start by printing the job from your application by selecting the *EnvelopeNOW Printer* which was created during installation, then select the printer from the sample file drop down menu. Certain limitations apply to printer data capture. See See "Technical Considerations" on page 35.

With the *Browse...* option, you can also select multiple PDF files by holding the CTRL key while clicking, or use the SHIFT and click to select a range of files. When you select multiple files, they are all merged together and treated as a single job.

## Choose the Project file.

Click the Choose a Project box to display a drop-down menu that lists all of the saved projects on your machine. Select the project you want to use by clicking on it. If no project appears here, make sure you create one first (see See "Create a new project" on page 17)

## Select an output printer

The project's default printer should already be selected, but you can click the Assigned Printer box to display a drop-down menu that displays all the printers installed on your system (including network and shared printers).

A special printer, *Save as PDF...*, also appears in the list. This printer will not output to a physical printer but instead creates a PDF file on your computer. When you click on **Print**, a dialog will open and ask you where you want to save this PDF and what name you want to use. Click **OK** once you have chosen the name and location to create the PDF file. Note that when using the Save as PDF.

The project will use the printer configuration from your job file to output to the printer. If you wish to change the driver settings or if the job file does not contain driver settings, click on the **Properties...** button.

When using the *Save as PDF...* printer, the output PDF contains information about the media types and mail piece boundaries in the form of embedded metadata. This metadata is compatible with our *PlanetPress Suite Workflow Tools* software.

Note also that if you use the *Save as PDF...* option while under Administrative Elevation in Windows 7 or Windows Vista, the folders that appear in the Save dialog will be those of the administrator account and not the user account. This may happen especially after a data capture using Admin User data capture mode.

## Click print.

Clicking **Print** sends your job to the printer and exits this window.

# Configuration

## The Preferences screen

To access the preferences screen click on the  button from the home screen. Once you are done changing the options, click on the **Apply** button to save and close the preferences.

Here are the tabs and options available in the *Preferences* screen:

### General

#### User Configuration

Here you can change the language of the application, as well as configure if you want the drop-down menus to automatically drop down in the application.

- Click on the **Language** drop-down to show a list of available software languages, then click on the desired language to select it.  
The new language will only take effect when you restart the application.
- Check the **Use System Default Local** if you want PlanetPress EnvelopeNOW to always remain in your operating system's language.
- To enable or disable the automatic drop-down, click in the **Automatically drop down lists** selector, or drag the small box from left to right to enable, vice-versa to disable.

#### Automation

- To select whether you want the automation to start when you turn on your computer or not, click in the **Launch on system startup** selector or drag the small box to enable or disable the automation on startup.
- You can also turn on automation and open the automation configuration screen by clicking on the **Scheduler** button.

For more information, see See "Automation configuration screen" on page 30

#### Data Capture

Change the data capture **Mode** drop-down to set PlanetPress EnvelopeNOW to execute any data capture from a printer queue using specific user logon rights:

- Choose **Current User** to perform data capture based on the current user's privileges.
- Choose **Admin User** to use the current user's administrative privileges or use account elevation (Windows Vista and higher only) if required.
- Choose **Selectable** for PlanetPress EnvelopeNOW to prompt you for either options when capturing.

For more information on user modes and data capture limitations, please see See "Technical Considerations" on page 35.

## Hardware

This section lists all of the hardware configuration files that are installed on your system. Click on the checkmark next to any configuration to select or deselect it.

For more information see See "Hardware Configurations" on page 28

## About

This screen displays information about the software, as well as the status of your activation. The Version area displays the current version of the software. The Serial number is also displayed along with your activation status.

- If the software is not activated, you can activate it from this window. Click on the **Activation...** button. For more information please see See "Trial Period" on page 13.
- To reach the technical support page on the PlanetPress EnvelopeNOW website, click on the **Support...** button.
- To launch the *Objectif Lune Update Client*, click on **Check for Updates** (see See "Installing PlanetPress EnvelopeNOW" on page 11).

## Hardware Configurations

Each Folder Inserter that is compatible with PlanetPress EnvelopeNOW comes with a hardware configuration file (hcf) that contains all of its capabilities and options. Each configuration file also contains the known limitations of the Inserter such as the scan marks area (where the Inserter can read the scan marks).

PlanetPress EnvelopeNOW comes pre-packaged with a number of hardware configuration files for a number of Folder Inserters. Each new version may add new Folder Inserter configurations. If your Folder Inserter is not listed, it is possible that no configuration file has been created for it.

Hardware Configuration Files are created and maintained by the Folder Inserter manufacturers and are not modifiable by Objectif Lune Inc. nor by you, the user. If the configuration file contains an error, please communicate with the manufacturer to advise them. Likewise, if the manufacturer does not provide configuration files via its website, you may request them by contacting the manufacturer directly.

### Activating and Disabling configuration files

You can display whether a specific hardware configuration appears in the hardware configuration drop-down list in the General Settings window of the project creation and modification screens.

#### To display or hide a hardware configuration:

1. From any window, click on the **Preferences** icon ().
2. Go to the **Hardware** tab.
3. The list is divided first by Folder Inserter name, then by configuration type as defined by the manufacturer.
4. Locate the specific configuration you want to show or hide. A checkmark next to the name means it will appear in the hardware configuration drop-down. No checkmark means it will be hidden.

5. You can click on "**Select All**" to check all the configurations, or "**Select None**" to remove all the check-marks.
6. Click **Apply** to save your changes.

Changes in this list will only appear when you next create or modify a project. If you already have a project open, the change will appear next time you open or create it.

# Automation

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## What is automation?

PlanetPress EnvelopeNOW can be set to run in automated mode which provides with the ability to automatically process your jobs as they come in, without user intervention.

The automated mode requires you to logon to Windows and will run as an application, not as a service. If you want PlanetPress EnvelopeNOW to run in automated mode when the computer starts, you will need to set an automatic logon to Windows and set PlanetPress EnvelopeNOW to start with Windows in automated mode through the options window.

While in automation mode, PlanetPress EnvelopeNOW will read an incoming source for jobs coming in, will associate the job with a defined project, and output to a specified destination.

To set PlanetPress EnvelopeNOW to run in automated mode, click on the **Preferences** icon () , click on the **General** tab and put a checkmark in the **Launch on system startup** option.

When automation captures a job from a printer queue or a PDF from a folder, the job or PDF will be deleted. This ensures that jobs will run only once.

All incoming jobs are processed in parallel (aka "multi-threading"). The number of parallel threads that are used depends on the number of processors present on the computer (one thread per processor).

## Automation configuration screen

### To access the automation configuration screen:

- From PlanetPress EnvelopeNOW: Click on the Preferences button () , then click the **Scheduler** button.
- From the automation tray icon (when running): Right-click on the tray icon and click on **Set Automation Processes**.

### To start and stop automation:

From the *Automation Configuration* screen, use the **Start/Stop Automation Session** slider to start and stop automation processing.

When you stop automation from the automation configuration screen or the automation tray icon, all automated

jobs will stop processing. If there are any automated jobs currently being processed, a warning window appears indicating that they will be cancelled. Click **Yes** to stop these jobs or **Cancel** to let the jobs continue and automation mode to remain active.

## To pause and resume automation:

From the *Automation Configuration* screen, use the **Pause/Resume Automation Session** slider to pause and resume automation. When you pause automated jobs, they will remain in the buffer and resume as soon as you resume automation.

## To add a new automated job:

1. From the *Automation Configuration* screen, click on the  button next to the *Automated Jobs* list. A new line is added to the *Automated Jobs* list.
2. Click on the **Job Source** drop-down and select either **Browse...** or a printer queue.
  - If you select **Browse...**, a browse dialog appears to let you indicate the folder where you want to capture your PDF jobs.
  - If you select a printer, any job printed to it will be captured. Please see See "Select a configuration file and sample document" on page 18 for information and limitations on capturing a printer queue.
3. Click on the **Project** drop-down and select the project you want to use for all incoming jobs.
4. Click on the **Save** button.

You can add as many automated jobs as you want.

Automated jobs will run simultaneously. The number of jobs that run at the same time depends on your computer and is equal to the number of processors (or core) available in the CPU.

## To delete an existing automated job:

1. From the *Automation Configuration* screen, click on the job you want to delete in the *Automated Jobs* list.
2. Click on the  button.
3. Click on the **Save** button.

## Limitations of automation

### Folder monitoring

When you select a folder with **Browse...** in the Automated Jobs screen, the PlanetPress EnvelopeNOW automation will watch this folder and capture any file that is sent to this folder. However, some limitations are present:

- Only PDF files can be compatible with automated jobs.
- No validation is made in the folder to capture PDF files only - any file placed in this folder will be captured.
- Only local, unshared folders can be monitored. Network folders and shared folders will not be monitored.
- Sub-Folders are not monitored.

Make sure that no other software or processes are trying to capture the files in the same folder as PlanetPress

EnvelopeNOW. For example, do not try to configure a process in PlanetPress Workflow Tool to capture from the same folder. This will cause unexpected and undesired behaviours.

## Printer Queue Capture

When you select a printer name in the Automated Jobs screen, the PlanetPress EnvelopeNOW automation will capture any job sent to this printer from any application. However, some limitations are present:

- The same limitations as capturing a sample file to create a project or print a job are present. Please see See "Select a configuration file and sample document" on page 18 for these limitations.
- Only printers installed locally on the computer can be captured from.
- Shared printers will not be captured.

For these reasons, we strongly suggest using the EnvelopeNOW Printer, which was installed at the same time as PlanetPress EnvelopeNOW, to capture your jobs.

## Error Handling

If an error occurs during processing for any reason, the file that caused the error will be sent directly to an error folder that is located in your computer under *My Document/PlanetPress EnvelopeNOW/Error*. The PDF File can be reprocessed either by placing it in a monitored folder, or by using the **Print Job** option from the PlanetPress EnvelopeNOW Home Screen.

## The tray icon

When PlanetPress EnvelopeNOW is running in automation mode, a tray icon will be visible in the *System Notification Area* of your taskbar, at the bottom-right of your computer screen. This icon gives you the ability to control what goes on with the automation.

Here are the menu items and their functions:

- **Start/Stop** : Starts or stops all processes.
- **Pause/Rotate processing** : Pauses or restarts all jobs currently being processed
- **Set Automation Processes** : Opens the automation configuration window.
- **Exit The Application** : Stops all processes and exits automation.

## Command Line Options

Using command line options is a technical process and requires more advanced knowledge to be used properly. Please disregard this section if you do not need to use the command line options!

PlanetPress EnvelopeNOW has the ability to be launched directly from a command line without displaying a window or requiring any user input. This gives you the ability to run a job through a process from an external application, in a batch file, or from the Run menu.

## Location

The executable to use the command line options is EnvNow.exe , located in the program files.

- Under Windows XP, Vista and 7 32-bits, this folder is C:\Program Files\PlanetPress EnvelopeNOW\Bin\EnvNow.exe
- Under Windows Vista/7, this folder is C:\Program Files (x86)\PlanetPress EnvelopeNOW\Bin\EnvNow.exe

## Usage:

EnvNow.exe [options] projectname inputfilename [output]

- **[options]** are the optional parameters to use (see section below)
- **projectname** is the name of the project file to use. If your project name contains spaces, surround it with double quotes.
- **inputfilename** is the input file name to process through the project. This file should be a valid PDF file.
- **[output]** is the optional output type. By default, the output will be to the default printer specified in the process.

If your project is configured using the *Produce PDF* printer, a window will be displayed asking where you want to save the file and automation will stop until this dialog is closed. If you want to create a PDF, please use the **-output** option instead.

## Options:

The following options can be used:

- **-loglevel <level>** : logging level from 1 (lowest verbosity) to 4 (highest)
  1. Errors only
  2. Errors and warning
  3. Errors, warnings and information messages (default)
  4. Everything (useful for debugging)
- **-logprefixes** : Prefix log messages with a string indicating its severity.
- **-meta <filename>** : filename of a metadata file to attach to the input file.

## Output Types:

- **-output <outputname>** : the job file is printed to a PDF using the *outputname* path and file name.
- **-print <printname>** : The job is printed to the specified printer name. If your printer name contains spaces, surround it with double quotes.

## Examples:

EnvNow.exe -loglevel 4 MyProject "C:\Data\Input\JobFile.pdf" -output "C:\Data\Output\MyProject-Output.pdf"

This will use the *JobFile.pdf* file, run it through the *MyProject* project, and generate a pdf named *MyProject-Output.pdf*. A very verbose log is returned (or displayed in the command line window).

EnvNow.exe "My Second Project" "C:\Data\Input\JobFile.pdf" -print "Lexmark Optra T612 PS"

*JobFile.pdf* is run through *My Second Project* and printed out to a local printer named *Lexmark Optra T612 PS*.

EnvNow.exe "My Project" "C:\livejob.pdf"

*livejob.pdf* is run through *My Project* and is sent to the output printer set inside the project file.

# Troubleshooting

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## Frequently Asked Questions

This page lists some of the questions that are the most frequently asked by users of PlanetPress EnvelopeNOW.

Issue	Possible Solution(s)
When I select a printer to capture a job, nothing happens.	Make sure that: <ul style="list-style-type: none"><li>• The printer queue you selected is paused.</li><li>• There is at least one job waiting in the printer queue.</li></ul>
My Folder Inserter does not recognize the scan marks.	Make sure that your scan marks are inside of the scan mark area (highlighted in light red), and that you have selected the proper Folder Inserter in the hardware configuration selection screen.
The order of the printed job is reversed.	This is normal in some Folder Inserters and is determined by the hardware configuration. If the page order is reversed it means that the manufacturer indicates that it should. This also means that you should never print your job in reverse from your application when it is meant to be used in PlanetPress EnvelopeNOW.
The Code39 barcode printed is not readable by my barcode reader.	This is normal. Scan marks are by no means standard and each Folder Inserter has its own specifications, and the Code39 used by Folder Inserters does not follow the standards established by the barcode specifications.
The Scan Marks do not look right in the preview screen.	The Preview screen, as well as the actual PDF Preview you can check from the Project Information screen may be slightly different than what you expect to see, however it should be correctly interpreted by your Folder Inserter. Try a test run of a few mail pieces to confirm.
If I print in Duplex mode or place the Scan Marks on the back, printing is much slower.	Most printers will be slower in Duplex mode, as the sheet has to be printed, flipped, and printed again for the back side. This is normal except for very high-end printers that have two print heads in them. For simplex jobs with scan marks in the back, the same applies, as PlanetPress EnvelopeNOW has to create a duplex job to place the scan marks.

## Technical Considerations

This page lists technical, environment and user considerations that may affect users of PlanetPress EnvelopeNOW. Under normal circumstances, this information is not critical to using and understanding PlanetPress EnvelopeNOW.

## Data Capture Limitations

You can only capture a sample file or job file from a local, non-shared printer which means network and shared printers cannot be used. Only the first 50 pages of your sample file will be shown in the preview at any given time however when you print your job, all the pages are printed.

You can also capture a sample file from a different printer, but this printer has to be *paused* so it queues the job but does not actually print it. Additionally, you must be using a printer that uses a PostScript driver. Finally, this printer must be in RAW mode so the information is useable by PlanetPress EnvelopeNOW. When you select any printer other than the EnvelopeNOW printer, PlanetPress EnvelopeNOW will automatically ask you to convert it to RAW mode.

There are some limitations in capturing from a printer other than the EnvelopeNOW printer:

- Built-In accounts (Administrator and Guest) are not supported in data capture.
- Under *Current User* mode for a standard (non-administrator) user, data capture will only be successful if the user is the owner of both the printer and the job and has full access on both.
- Under Current User mode, if multiple jobs are pending on the captured printer, the print job that gets captured is the first one that belongs to the user.
- Under Admin User mode, if multiple jobs are pending on the captured printer, the oldest print job in the queue will be captured regardless of who owns it.
- The user account must have access to **read and write** the *C:/Windows/System32/spool/PRINTER/* folder.
- In Windows XP and Windows 2003, the *Admin User* mode can only be used when your user account is an administrator of the machine.

## Conversion Limitations

When selecting a printer other than the default EnvelopeNOW Printer, a one-time conversion must occur to convert the printer queue into RAW mode, and to pause the printer queue. The following limitations apply to this conversion process:

- When converting, all print jobs currently in the printer queue will be deleted and lost.
- The user account doing the conversion must have access to **read and write** the *C:/Windows/System32/spool/PRINTER/* folder.
- The user account doing the conversion must have the proper rights to stop and start the Windows Print Spooler service. Generally this is reserved to administrator accounts.
- In order to convert a printer to RAW mode and prepare it for capture, the user must be an administrator of the computer. With Windows Vista and Windows 7, this can be done through Elevation (UAC must be enabled) with the *Admin User* mode selected.

# Contact Us

While Objectif Lune develops PlanetPress EnvelopeNOW, first level support is done through our software reseller. For support, please contact the reseller from which you purchased the software originally (generally, the company that sold you the Folder Inserter used by PlanetPress EnvelopeNOW).

Note that we do offer direct technical support, however it is charged on a per-call basis. For more information, please review the following page:

<http://www.ppenvelopenow.com/support/>

# Glossary

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## **boundary**

The physical separation between mail pieces. When a boundary is found, it means the end of one mail piece and the beginning of a new one.

## **configuration file**

A file of the HCF format describing, in technical language, the features and functions that your post-processing hardware supports. One configuration file contains not only the features available on your hardware, but the default values defined for a specific job type. Only one configuration file can be assigned to a Project File.

## **document**

A collection of one or more sheets printed together and intended for a single recipient. A promotional letter being sent to John Doe qualifies as a single document.

## **folder inserter**

Post-Processing Finishing Hardware used to fold mail pieces and insert them into individual envelopes. This is the intended recipient of any output generated by PlanetPress EnvelopeNOW. Note that PlanetPress EnvelopeNOW is targetted towards smaller desktop Folder Inserters.

## **job**

A collection of one or more mail pieces to be processed in a single pass. Mail pieces within the same job are not required to have the same number of documents or sheets.

## **job file**

A multi-page document used as an input for a job, or as a sample to create a new project file. A job file is captured from a printer queue or opened from a local folder as a PDF or PostScript file.

## **mail piece**

A collection of one or more documents intended for a single recipient; in other words, the contents of a single envelope. A promotional letter and an

invoice both being sent to John Doe constitute a mail piece. It is assumed that each document within a mail piece always starts on the front page of a sheet, whether these specific documents are duplexed or not

## **page**

One side of a sheet of paper. A duplex (2-sided) sheet is two pages.

## **project file**

A PlanetPress EnvelopeNOW Project File containing a series of settings designed to produce a specific type of results when processing an incoming job. Each project files is linked to a specific configuration file and to user-defined parameters. Project Files are re-useable, but only for identical types of jobs that require the same scan marks and use the same conditions on the page.

## **scan mark**

A series of markings containing information that can be automatically read and interpreted by folder inserters. Scan marks are usually found on the edge of some or all pages, and may come in several shapes, depending on the hardware. PlanetPress EnvelopeNow currently supports OMR and Code39 barcodes. The configuration file defines what scan marks are supported by the folder inserter.

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See Computer, virtual  
machine

Windows Version

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