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Presort

Views Quick Start Guide

Presort Views Quick Start Guide

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Introduction to Presort Views

Presort Views is an interactive, graphical tool for setting up and verifying jobs. It offers convenient menus, online help, and instant feedback. Presort Views includes other handy tools, too.
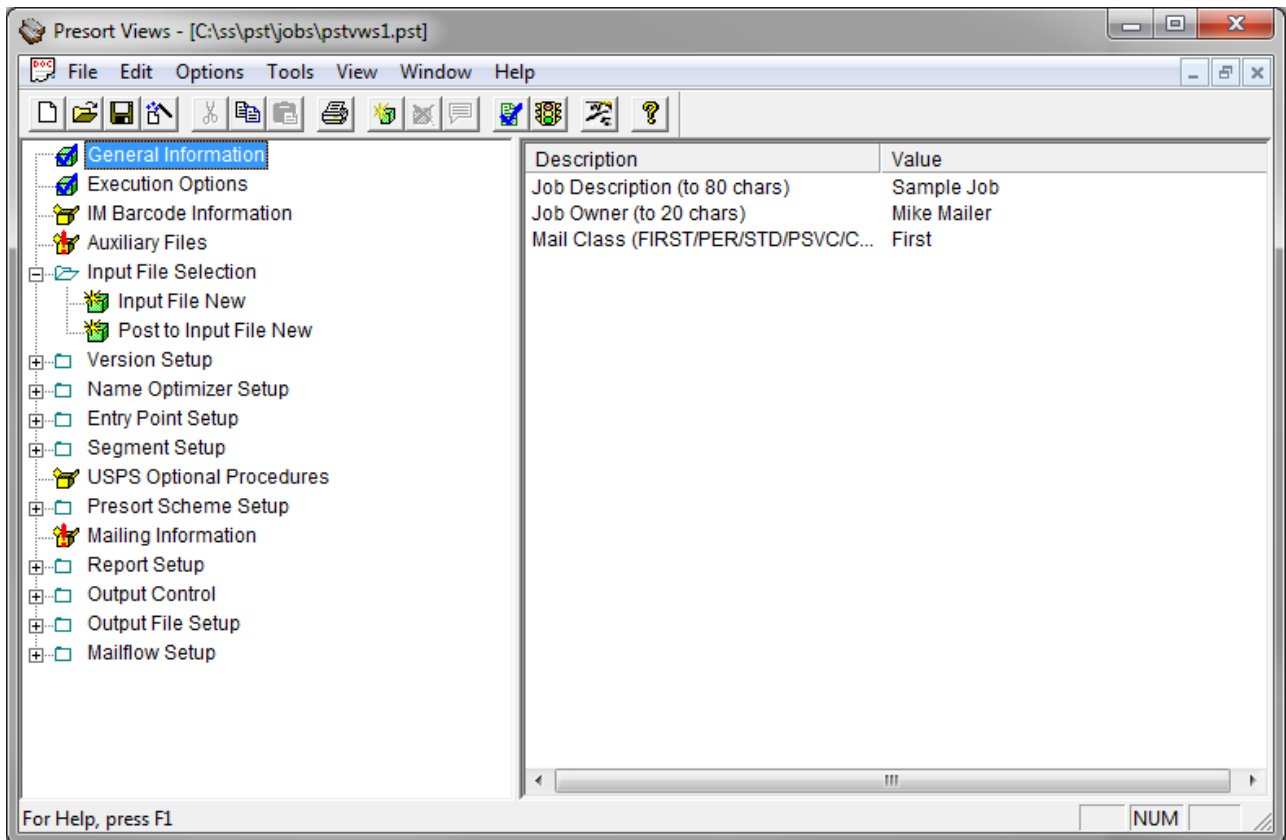
Setting up jobs

Presort Views is an interactive tool for setting up and verifying job files.

When it's time to process your job, Presort Views automatically runs another program called Presort Job. You can launch job processing directly (pstvws.exe), or from inside Presort Views.

Presort Views and job files

Job files are organized into groups of parameters called blocks. Each Presort Views setup window corresponds to a block in the job file. The screen shot below shows the relationship between a Presort Views window and the job-file block.

> **NOTE**   The order in which the options appear in Presort Views doesn't always match the order in the job file.
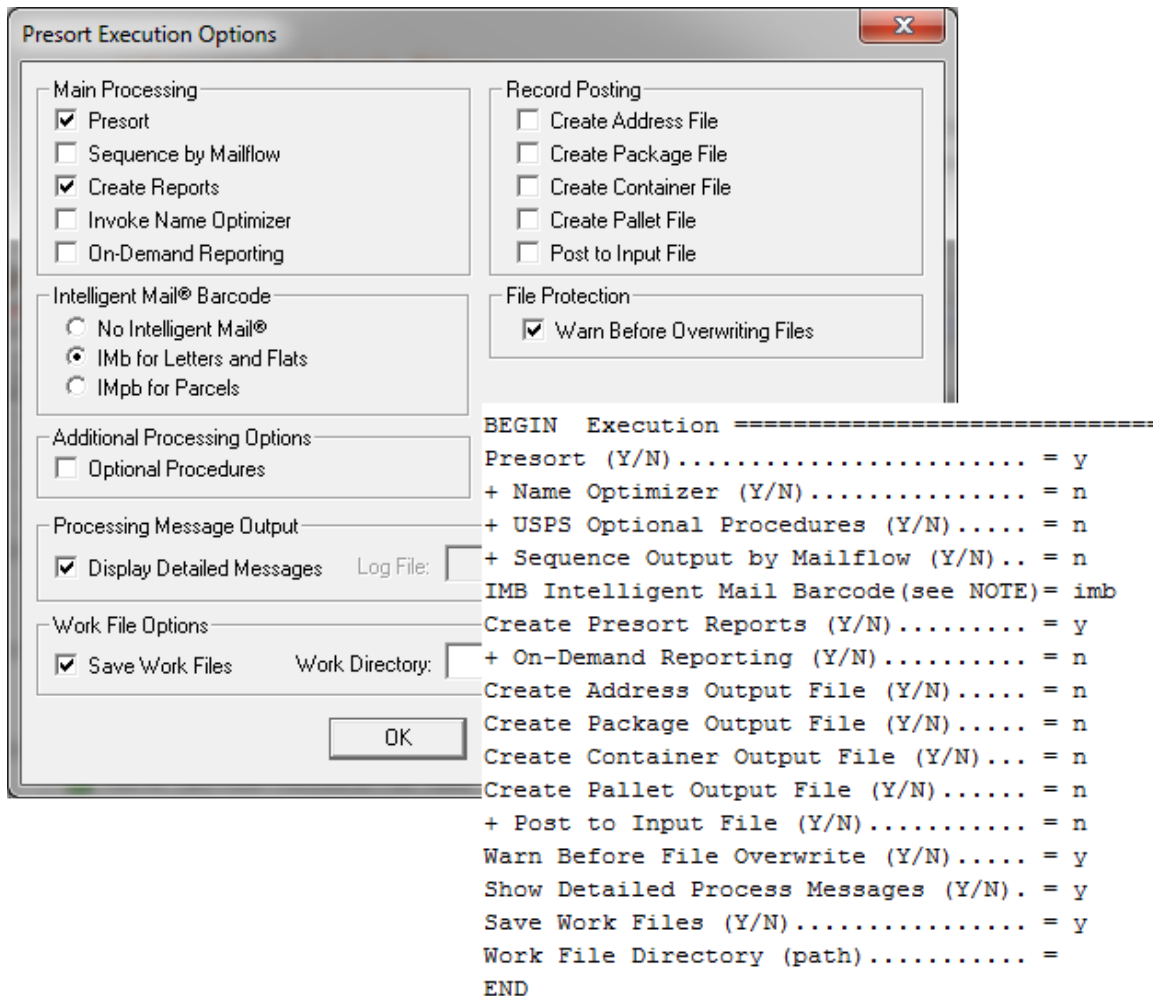
Setting defaults before working on jobs

After you install Presort Views, you must set defaults. To do this:

1. Start Views.
2. Choose **Options** > **Defaults**.
3. Set the locations for auxiliary files, report formats, execution, and so on.

Basic information is below. For details, see the online help. Repeat this process for each Presort Views program you have.

Auxiliary files

Auxiliary files are directories and dictionaries on which our programs depend for information. Each program needs to know where these files are located. The software uses your defaults for auxiliary files whenever you start a new job.

Reports

You can set the following types of information for reports.

- Basics: File name, number of copies, what to do if the file already exists, and so on.
- Page layout: Page size, margins, headers, and capitalization.
- Printer setup: Control codes that switch your printer into a different font, size, print direction, and so on.

You can control your report-printing options at the following levels.

- Universal: You can create universal report settings if you plan to use them for most jobs. To set these, choose **Options** > **Defaults**, and then click on the **Report Defaults** tab. These settings will be used as defaults whenever you start a new job file.
- Job: Within a particular job, you can override the universal report settings and set defaults that will apply to all reports in that job. In the job, look under Report Setup for the Report Defaults block.
- Report: Finally, you can customize the settings for one report within a particular job. Go to that report in the job (for example, open the Job Summary window).

Execution

Through Execution settings, you control placement of work files, logging of processing messages, and so on.

Setting up jobs in Presort Views

Presort Views provides the following ways to work with job files.

- Wizard: Like many Windows programs, Presort Views offers a step-by-step wizard approach. You can start a new job and set it up completely with the wizard.
- Designer: The Designer gives you access to all of the features and options available. Use the Designer when you want to reuse an existing job file, such as an earlier job, or one of our templates or sample jobs.

Supporting files

When our programs process a database, certain supporting files, called the DEF and FMT, or DMT files, are required. For more information about these files, see Database Prep.

With Presort Views, you'll have access to DefMap, which you can use to create the DEF file.

NOTE   You must create FMT and DMT files outside of Presort Views, using a text editor such as Notepad. Do this before you start working on the job file in Presort Views.

Other tips

As you set up jobs in Presort Views, consider the following tips.

- While working in the Designer, be sure to save your job because your settings are not permanently recorded in the job file until you save it. As shown at right, the software indicates unsaved changes with a red C.
- When you name job files, you may use long file names systems. However, you must use the usual extension of .pst.
- In the Designer, you can comment out a block (deactivate it). However, to edit anything in that block, you have to un-comment (activate) it first. After editing, you may wish to deactivate the block again.

Symbols that show the status of job sections

When you work on a job file in the Presort Views Designer, Presort Views displays the job in a two-part window. On the left, there's a diagram of all the sections (blocks) in the job file. You can select any one, and Presort Views will display a synopsis of that section on the right side. For example:
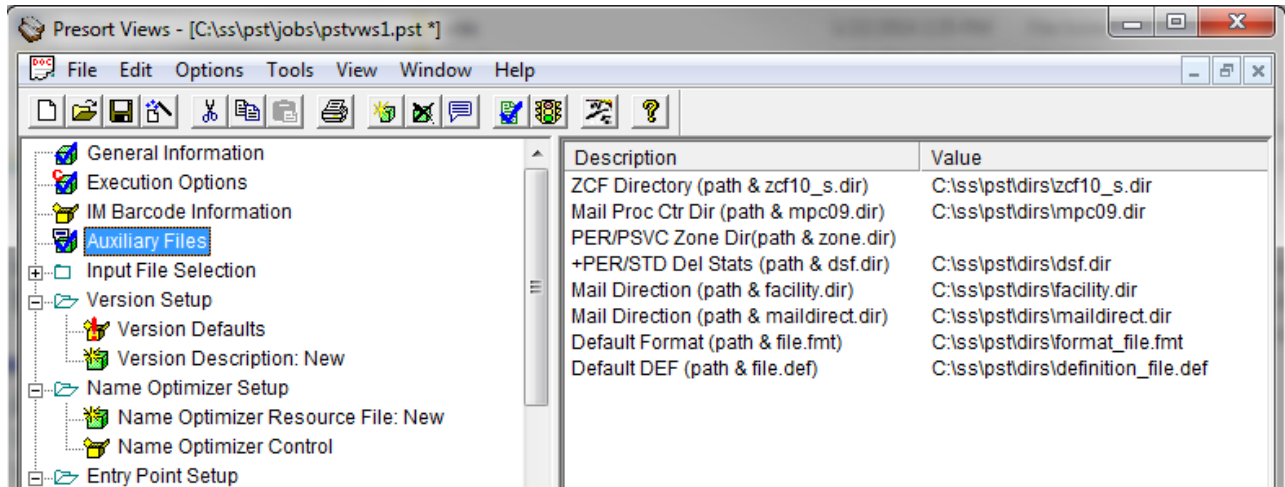
In the job diagram, Presort Views uses a set of symbols to indicate job status. With these cues you can see immediately which sections (blocks) are complete and which ones are not complete. The following table lists the symbols and their respective descriptions.

Symbol	Description
	Click a folder to expand/collapse a group so you can see all the blocks in it, or close the group and see only the group name.
	Until you set up a block, the symbol is an open, empty box. A red exclamation mark indicates that the block is mandatory.
	When a block is ready for use, it looks like a closed, green box with a blue check mark.
	A red C indicates that there are unsaved changes in this block.
	When you want to temporarily deactivate a block (that is, make the software ignore it), you can comment it out by choosing Edit	Comment Block.

	The combination of the red C with a box around it shows that there are unsaved changes and that the block is commented out.
	This indicates a way to add a new block. To add another block, click the new block symbol.

Verifying your job file

Presort Views checks your job setup in the following ways.

Parameters and blocks

If you incorrectly set a parameter, Presort Views either beeps or displays an error message. When you click **OK** to close a window, Presort Views checks the whole window for errors or conflicts. We separate Errors from Fatal Errors for the benefit of users who run on a network. For more information, see the System Administrator's Guide.

Whole job

Before processing, check the whole job for possible conflicts between blocks by choosing **File > Verify Job**. Presort Views may report the following types of information.

- Warnings indicate possible problems.
- Errors indicate problems that prevent running the job on the current computer.
- Fatal Errors indicate that the job won't run on any computer.

Presort Views will present a list of problems in the **Browse Job Problems** window. When you select a problem that you want to address, Presort Views can take you to the problem area in the job file. Presort Views will detect and report as many problems as it can find.
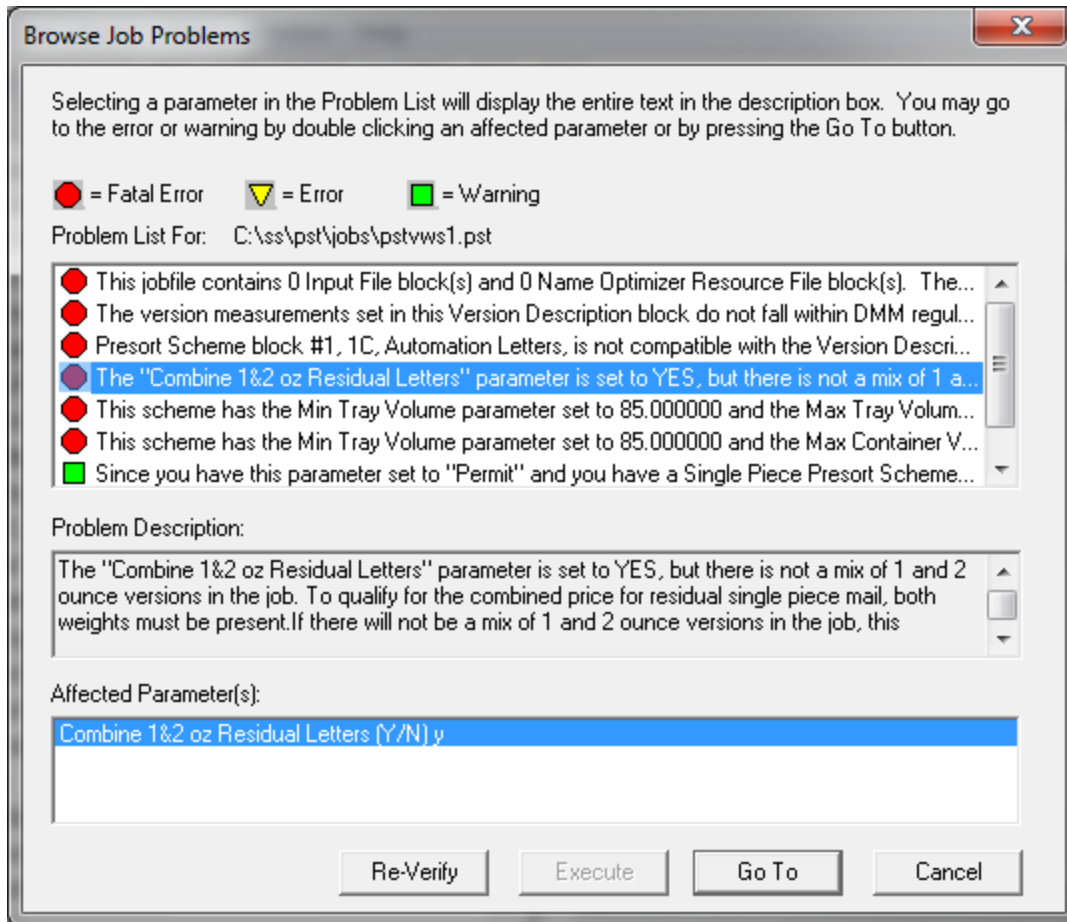
Be sure to address each problem in the order listed because correcting one problem may correct others. Click the **Re-Verify** button after correcting each problem.

Run time

When you start job processing, the Job program will verify your entire job before processing begins because some job errors might not have been detected. This is possible especially if you use Presort Views in a network setting. For more information, see the *System Administrator's Guide*.

Remote Presort Views: Job set up Windows, processing on UNIX

Remote Presort Views is a product for networks. You set up your job with Presort Views on a Windows PC, then process the job using a UNIX server.
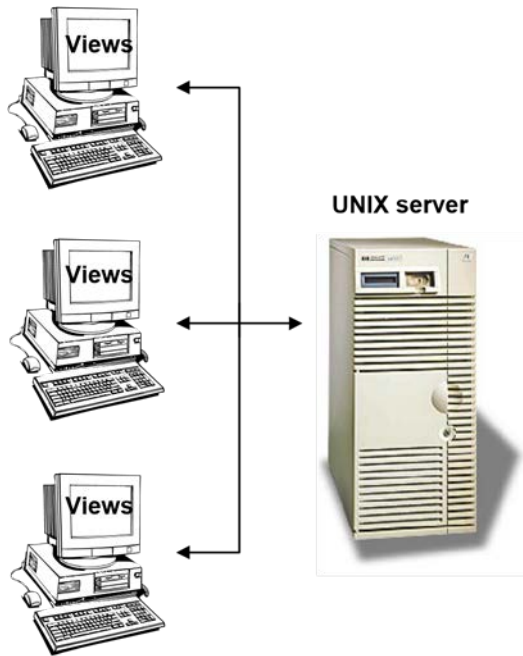
Supported server platforms are Sun Solaris, IBM AIX, Linux - Red Hat, and Linux - SUSE. Refer to the System Administrator Guide for installing Presort Remote Views.

If you have been editing job files on your UNIX system using a text editor, you'll find that using Presort Remote Views can help you reduce the time to train new users. Although Presort Remote Views looks and works very much like regular Presort Views—same online help, same wizards, and so on—there are some differences:

- When you launch Presort Remote Views, you must give a user name and password to log into the UNIX server.
- When you need to enter the pathname of a file—a database to process or a postal directory, for example—you can browse the file system on your UNIX server. When you verify your job (at the PC), Views checks that the files exist on the server.
- When you launch job processing, it occurs on the server. Work files, reports, and output files are created on the server. You monitor job progress from your PC, and when the job is finished, the program notifies you at your PC.
- When you install an update, you install twice: The Presort Views software on your PC, and the server software (called a *daemon*) on your UNIX server.

Getting Help and Support

Choose among self-help options, or contact BCC Customer Support.

Help Options

Integrated Help

Presort has integrated help. From within the software, use the **Help** menu or press **F1**.

User Guides

Presort includes complete documentation.

- Not sure you've got the latest guide? You can always find the current version of the user guide, plus other supporting documentation, in the Manuals & Quick Guides section of the BCC Customer Portal:
  https://portal.bccsoftware.com/Support/techManuals.aspx ⇨.
- Release notes are posted alongside each software version on the Product Downloads page:
  https://portal.bccsoftware.com/profile/productdownloads.aspx ⇨.

Knowledge Base

Read tips, tricks, and best practices for using our products. The BCC Software Knowledge Base is searchable by keyword, product, or both:
https://portal.bccsoftware.com/support/knowledgebase.aspx ⇨.

User Forum

Join the dialogue with our experts and your mailing-industry colleagues on the BCC Software User Forum:
https://portal.bccsoftware.com/forum/ ⇨.

General and product-specific boards hold information on the latest regulations, solutions to problems, and answers to specific questions.

Support: Contact Us

Technical support is included with your Presort license. There are several ways to reach a support technician:

- Online. Open a support case at https://portal.bccsoftware.com/support/contactSupport.aspx ⇨.
- Email: support@bccsoftware.com ⇨.
- Phone: 800-624-5234.