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**BTS Software**

**Bulk Mail Tracking System**

**For BulkPost Venture**

**November 2005**

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## **Important Information**

**When using BTS you must be mindful of the following.**

- ❖ Make sure you read the messages you are prompted with and provide judicious responses to them. Respond with a safe choice if you are doubtful and then seek advice.**
- ❖ Make sure that you specify a password for your username to prevent another user operating with your user name.**
- ❖ Make sure you backup regularly to protect against loss of data and make recovery after a loss less costly. Do backups regularly via “BTS Backup” icon .**

## 1 Introduction to Bulk Mail Tracking Software Suite

**BulkPost Mail Tracking (BTS)** is a suite of software modules designed to enhance the delivery and tracking of mail items at BulkPost Venture. The overall objective is to

- Improve significantly on the speed of delivery of mail.
- Provide quick and precise response to customer enquiries on the status of mail.
- Maintain a concise databank of information on movements of mail, mailing lists and clients' information to enhance customer enquiries.

BTS software is multi-user client/server software designed to operate on standard computers running Microsoft Windows 2000/XP operating systems on a local area network. BTS also comes with an Internet based mail-tracking module through which customers can track the status of their mail via the Internet.

BTS captures the key mail management processes from the Registrars\Clients end through to delivery by Bulkpost. The modular structure of BTS allows for future extensions and enhancements.

### 1.1 BTS Software Development Tools and Platforms

BTS software comprises several modules and database platforms all integrated to provide a complete suite of programs integrated across the network. Development tools employed are

- Microsoft Visual Basic 6.0
- Microsoft SQL-Server
- Microsoft Access 2000/XP
- Microsoft Basic Internet Information Service (IIS)
- Microsoft Frontpage
- Microsoft Visual Basic Script Language (VBScript)

### 1.2 Structure of BTS

The BTS software suite is grouped into 3 main modules according to the following:

1. Registrars Generation of Mailing List
2. Bulkpost Handling of Mail from each Registrar
3. Customer Enquiries via the Internet.

Respectively the following modules are provided

1. **Bulk Mail Generation System** to be used by the Registrars to generate their mailing list.
2. **Bulk Mail Tracking System** used at Bulkpost Venture to validate, verify and process mail items sent by the Registrars.
3. **Customer Enquiries On Web** residing on the website for customers to check status history of mail

### 1.3 Bulk Mail Generation System Functions & Features

- **Capture Addressees details**, including addresses and postcodes
- **Generate Mail Items**: Creates mailing list based on addressees
- **Export Mail List**: Exports mail list into text or spreadsheet format to be sent to Bulkpost.
- Search Mail Items:
- Search Addressee Databank

**If each Registrar adopts this module, electronic transfer of mail items list will be done seamlessly. The exported mail list will be sent to Bulkpost on a cd or via the Internet where it will be imported directly to the databank at Bulkpost's end.**

### 1.4 Bulk Mail Tracking System Functions & Features

The following list enumerates the core activities of the Bulk Mail Tracking System module of BTS. This module will be deployed at the BulkPost Headquarters.

- Import Mailing List
- Transfer Mail For CBC Batching
- Sort Mail To CBC Batching
- Review Mail Before Despatch
- CBC Analyses & Despatching
- Process Despatched CBCs
- Process Despatched Mail Items
- Clients Advice
- Management Advice
- Mail History
- Mail Items Archiving
- Search Engines

Key features of the software include

- Manages a databank of addressees for each client
- Automatic update of addressees list and addressees details
- Coding of each registrar and client.
- Uniqueness of each mail item: **A barcode number is generated for each mail item.**
- Integration with a Postcode Databank
- Automatic CBC batching of mail items.

### 1.5 Customer Enquiries on Web

- Track Mail Items via the Internet

## **1.6 Guideline to this document**

This document describes how to use BTS. It will, however, be valid for versions that would have been tailored to your environment. Furthermore, the words **interfaces** and **forms** are both computing terminologies describing the visual displays on the screen that users interact with; they will be used freely and interchangeably in the document.

**To quickly grasp the concepts and procedures presented in this document, it is recommended you initiate a session of BTS on the computer in parallel to studying this document.**

## 2 Bulk Mail Tracking Process Workflow

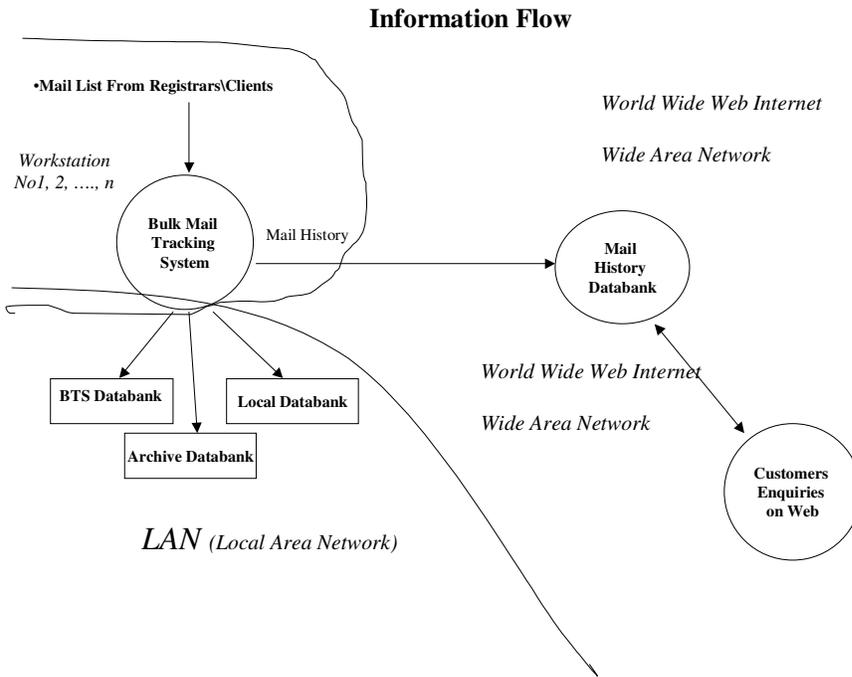
This section describes in brief the major steps that are followed using BTS. This workflow defines the logical framework on which the software was designed.

### 2.1 Workflow At Registrars End – Using Bulk Mail Generation System

1. **Create records for new clients** of the Registrar: Note that a Registrar acts on behalf of clients.
2. **Create records of new addressees** complete with address and postcode.
3. **Generate Mailing List.** The mailing list is the list of mail items to be sent to addressees. Since the addressees databank is available, you can automatically generate mail list for all addressees of each client if, for example, you require to send dividend warrants to all your shareholders. Alternatively, you can add a mail item directly either by specifying the addressees **account code** or entering the record directly
4. **Review the mail list** and modify information such as the addressees name, address and postcode before despatch to Bulkpost.
5. **Set the status of the mail batch** generated and prepare the mail items for shipment
6. **Export the mail** list generated in Steps 3-6 into either text format (.txt file) or spreadsheet (Microsoft Excel recommended) format (.xls file).
7. Print the mail list; copy the exported mail list onto a cdrom and send to Bulkpost. Alternatively, send the exported mail list as an attachment via email to Bulkpost.
8. Notify Bulkpost of despatch of mail items.

Notes:

- **Each mail item** created in the mail list is uniquely identified with a **barcode number** automatically generated when the mailing list is created.
- Each **Addressee** of a clients is identified by a unique **account number**.



## 2.2 Workflow At Bulkpost Venture End – Using Bulk Mail Tracking System

1. Copy the mail list sent by the **Registrar** to a suitable directory on your computer
2. Alternatively, if the mail list was sent via email, download the file to a suitable directory on your computer
3. **Import (Download) the mail list** into BTS databank from the downloaded file.
4. **Transfer mail list downloaded in step 3 for CBC Batching.** This displays the mail list according to client.
  - You can modify the name, address and postcode of each record to correct/update the details of the addressee in your databank.
  - You can add a mail item to the list for an existing addressee by entering the account no of the addressee.
5. **Sort the mail items into CBC Batches.**
  - For mail items with valid postcodes in the address, you can initiate automatic batching to CBCs.
  - Items without postcodes will remain un-batched and will have to be batched individually.

**This illustrates the importance of integrating the Nigerian Postcode Directory with BTS software.**

6. On completion of CBC Batching, **Review the mail list before despatch.** This simply provides another opportunity to verify and modify addresses, names and postcode on the mail list.
7. **Analyse CBC Batches.** Each CBC is reviewed prior to despatch. Another opportunity to add new mail items directly to a CBC is also provided.
8. **Despatch each CBC** to the respective mail centres
9. **Process CBCs after despatch.** This provides the opportunity to track the progress of each CBC (set the CBC's status) from the source to the destination GPD Centre.
10. **Process despatched mail items.** Enables the tracking of each mail item after despatch and delivery to the GPD centres. The status of each mail item can be periodically updated to ensure precise tracking of the item (**An important future extension of the software will be to provide this functionality nationwide via your intranet or the internet such that status of each mail item can be updated at any post office where Internet access is available**)
11. **Generate Client Advice** reports after despatch
12. **Generate Management Advice** reports after despatch.
13. **Generate History Records** of the status of all mail items. This puts the history into a separate databank, which can be transferred to your web site. Customers can therefore check the status of each mail item using the unique barcode number that was been generated for it when the mailing list was created.
14. Archive records of delivered mail items.
15. Search Engines to search for mail items, addressees, CBCs, mail history and all relevant information to enhance auditing of information.

### Notes

- New addressees are automatically updated into BTS databank when a mail list from a client is imported.
- The various opportunities to add to and/or modify the mail list along the processing steps is provided for flexibility to handle real situations such as late delivery of some mail items,

wrong addressees information, and to ensure a thorough audit of the mail list before despatch and hence further enhance the speed and certainty of delivery.

### **2.3 Workflow On Internet – Using Customer Enquiries on the Web**

1. Using Internet Explorer, search for the history and status of a mail item via the Intranet/Internet.

### **2.4 Overview**

This section provided a panoramic view of the key functionality of the software developed for Bulkpost.

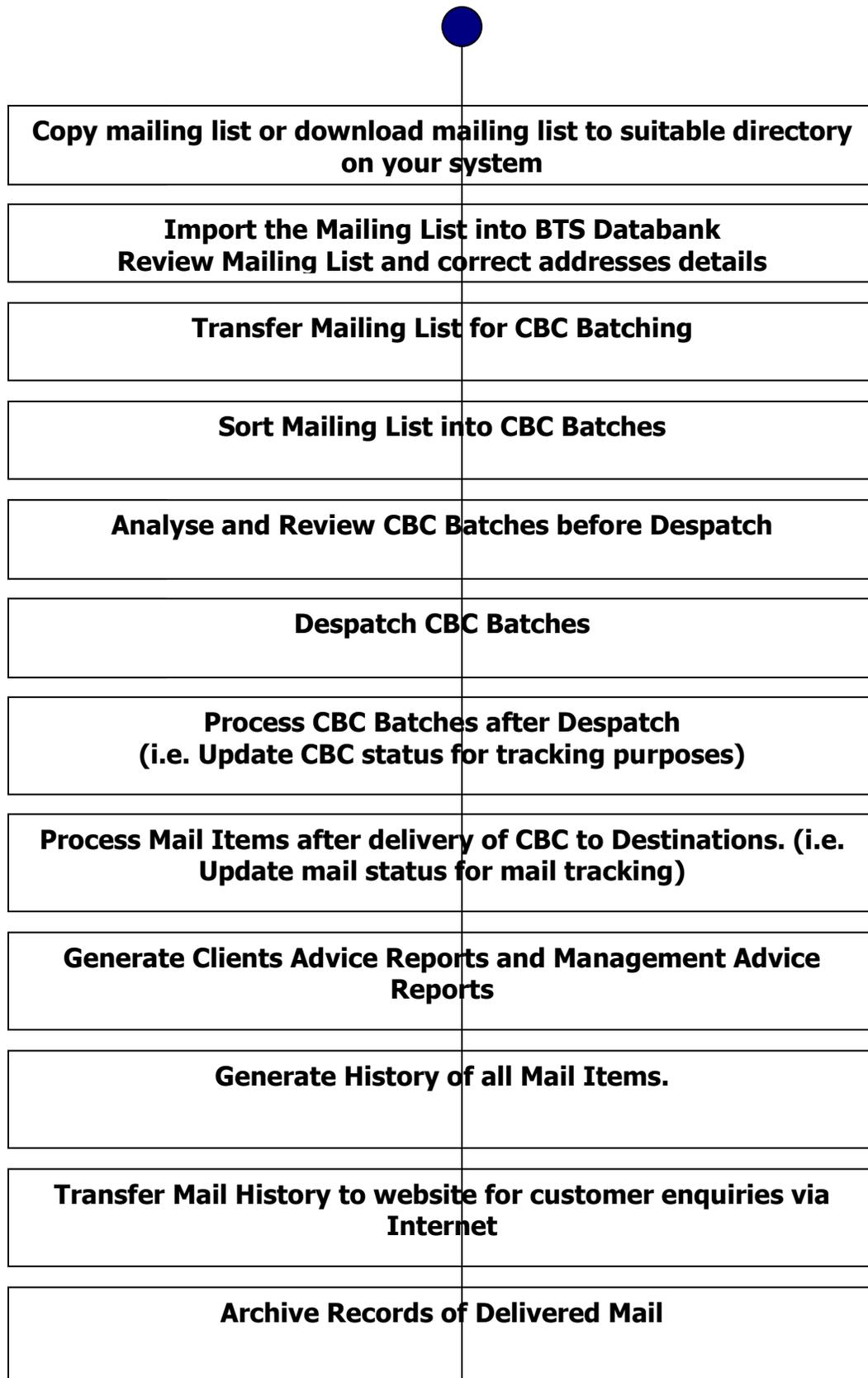
The module for the Registrars is beneficial since mailing list can be generated, verified and audited prior to getting to Bulkpost. The mail items could be automatically labelled with the barcodes and consistent and reliable addressees information, hence improve delivery of mail. (We hope the registrars could be convinced to purchase a copy of this module).

The Nigerian Postcode directory has also been integrated with the software. A database has been designed to capture the information and all the postcodes in the directory at our disposal has been reorganised in integrated in this database. The delivery streets are still outstanding, as we need an electronic copy to assist in speeding up the process. This will greatly enhance the BTS software potential since it will greatly simplify and automate the CBC batching of mail items if all addressees information are stamped with accurate postcode.

### Workflow at Registrars End



## Workflow at BulkPost End



### 3 Concepts, Terminologies and Configuration

Post Code

**370123**

First 3 Digits – Despatch Component

Last 3 Digits – Delivery Component

Digit of Post Code		Description
1 <sup>st</sup>	<b>3</b>	Zone
2 <sup>nd</sup>	<b>7</b>	Group of Postal Districts in Zone
3 <sup>rd</sup>	<b>0</b>	District; 0 is Head office i.e. the GPD Centre
4 <sup>th</sup>	<b>1</b>	Delivery Type (1, Rural; 2, Urban or Street; 0, Post Office)
5 <sup>th</sup>	<b>2</b>	Geographical Sector
6 <sup>th</sup>	<b>3</b>	Area

GPD: Group of Postal Districts

Importing Mailing List

Transfer for CBC Batching

Sort Mail To CBCs

Analysing Mail Batches

Only Batches that are pending despatch or have been despatched batches are in view

Process Despatched CBCs

Only Batches that have been despatched to GPD Post Offices

Process Despatched Mail Items

Only Batches that have been delivered to GPD Post Offices are in view

Generating Mail History

Generates history of mail item at the instant. This aids tracking of each mail item

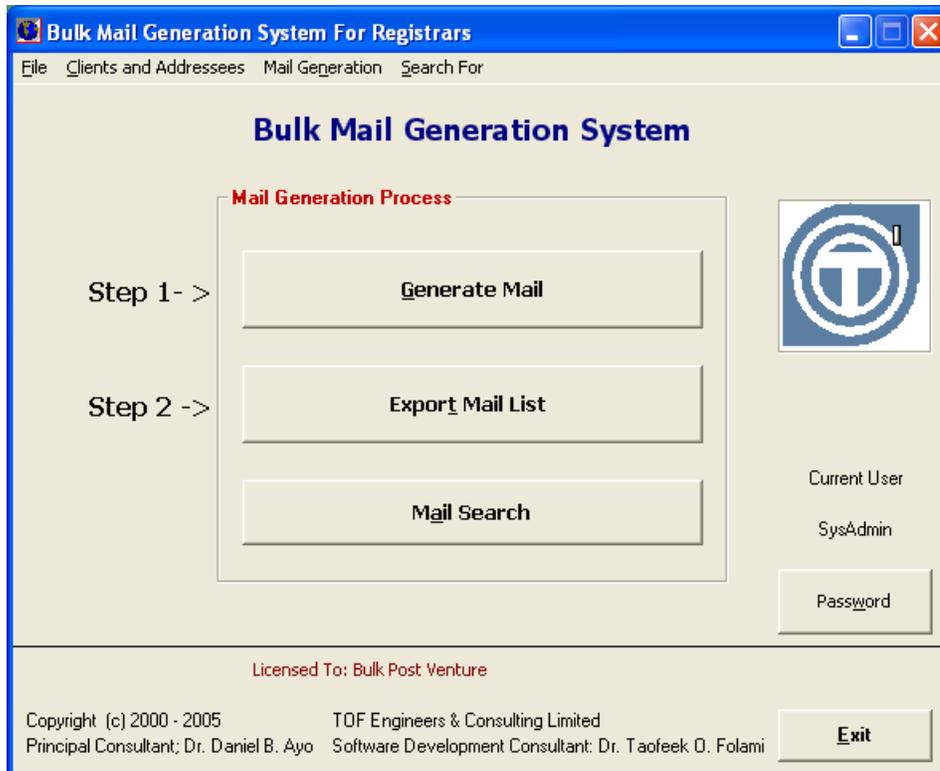
Batch and Mail Status Definitions in BTS

Status	Description
CBC Pending Despatch	Pending Despatch from source post office
CBC Completed	
CBC Despatched	Despatched to Destination Post Office
CBC Delivered To Destination PO	Delivered to Destination. Mail Items can be tracked individually
CBC In Transit	Batch is between source and destination
CBC Returned To Source PO	Returned to source post office
CBC Expires	CBC is Removed From Processing in BTS. User will not be able to access and update the status of mail items in this category of CBCs.
Mail in Transit	
Mail Delivered	
Mail Returned	
Mail to be Re-Delivered	

## 4 Using the Bulk Mail Generation System

We will discuss how to use the software to perform the following

- Create Client Information
- Create Addressees Information
- Generate Mailing list
- Export mailing list



### 4.1 Create Client Information

### 4.2 Create Addressees Information

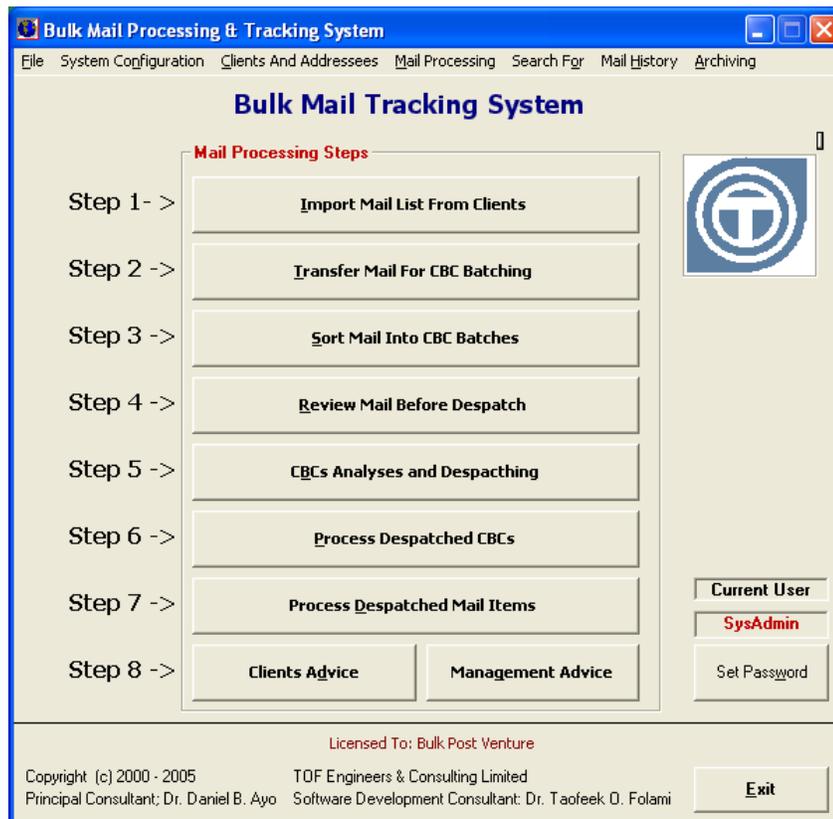
### 4.3 Generate Mailing list

### 4.4 Export Mailing list

## 5 Using Bulk Mail Tracking System

We will discuss how to use the software to perform the following.

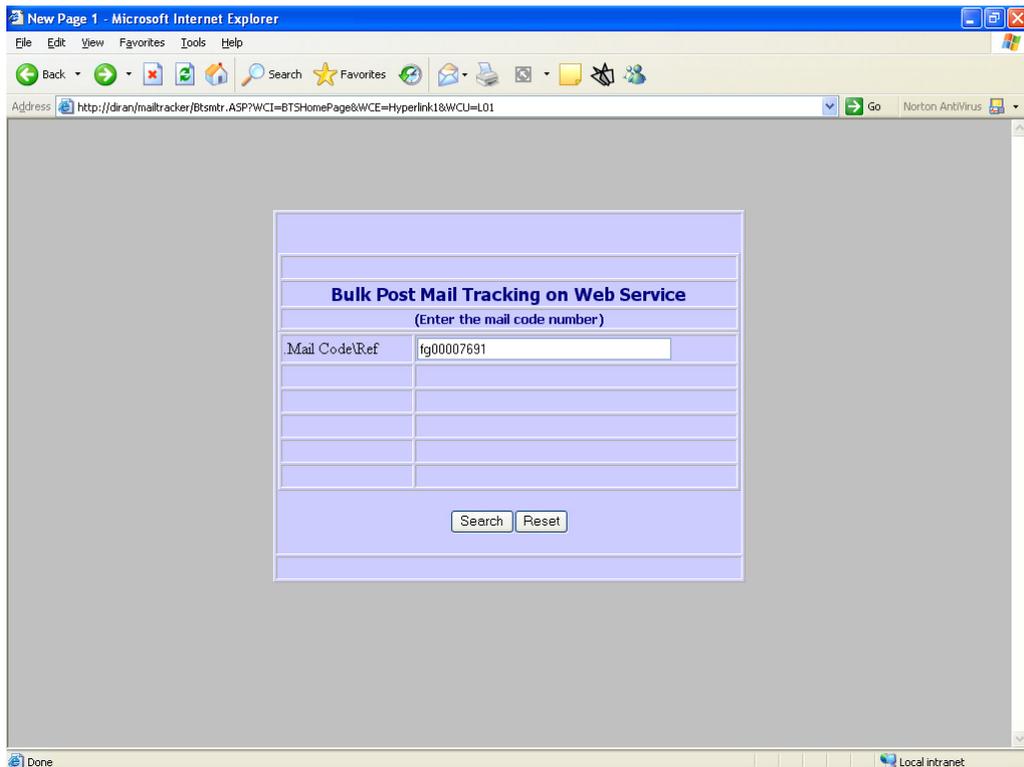
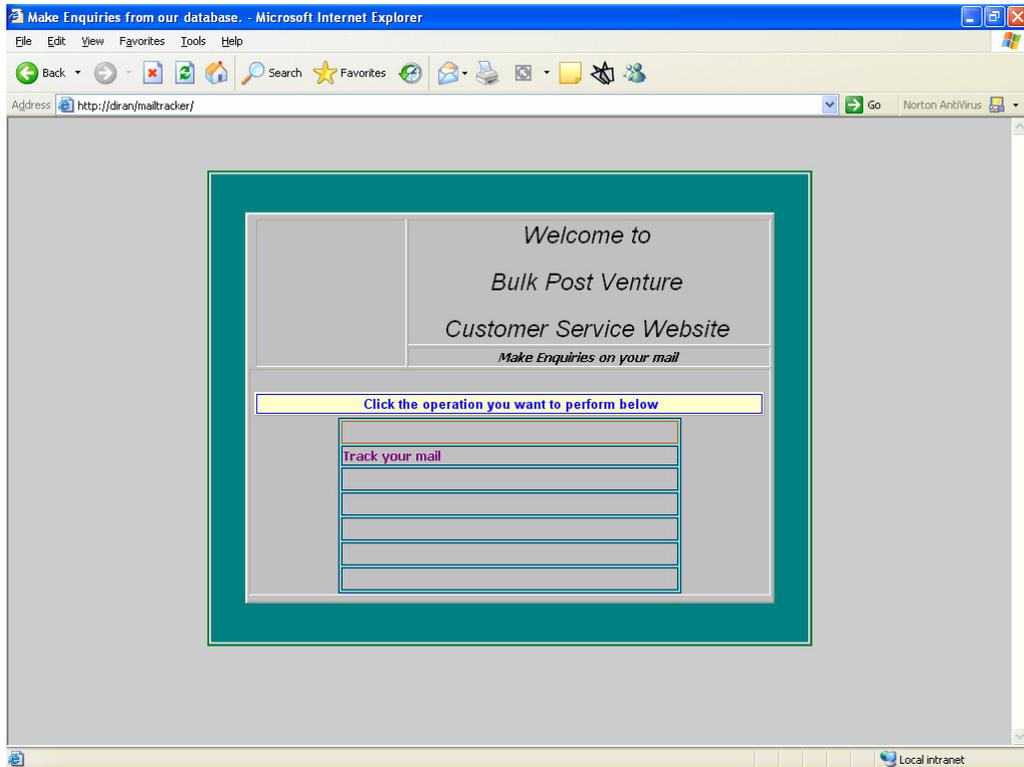
- Import Mail list from clients
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- CBC Analyses and Despatching
- Process despatched CBCs
- Process Despatched Mail Items
- Clients Advice Reports
- Management Advice Reports
- Generate mail History
- Archive Mail Records
- General Search Engines



- 5.1 Import Mail list from clients**
- 5.2 Transfer Mail for CBC Batching**
- 5.3 Sort Mail Into CBC Batches**
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- 5.5 CBC Analyses and Despatching**
- 5.6 Process despatched CBCs**
- 5.7 Process Despatched Mail Items**
- 5.8 Clients Advice Reports**
- 5.9 Management Advice Reports**
- 5.10 Generate mail History**
- 5.11 Archive Mail Records**
- 5.12 General Search Engines**

## 6 Customer Enquiries on the Web

We will discuss how to search for the status of a mail item on the web.



http://diran/mailtracker/Btsmtr.ASP?WCI=TrackMailItem&WCE=MailItemSearch&WCU=L01 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://diran/mailtracker/Btsmtr.ASP?WCI=TrackMailItem&WCE=MailItemSearch&WCU=L01

### Mail Tracker Result

[Home](#) [Back To Search](#)

Mail Code No ----- FG00007691

Item ----- LETTERS; Addressee ----- BABCOCK ENTERPRISE; Address ----- ; Post Code ----- 000000

**Mail History**

SN	Date	Time	Status	Received By	Date Delivered	Time Delivered	Remarks
1	01-Oct-2005	14:35:35	CBC Pending Despatch	-			
2	02-Oct-2005	04:06:54	CBC Pending Despatch	-			
3	02-Oct-2005	04:40:27	CBC Pending Despatch	-			
4	02-Oct-2005	13:09:52	CBC Pending Despatch	-			

Done Local Intranet

## 7 BTS Concepts

### 7.1.1 Security Profiling

Users are created to access BTS and each user is assigned a security level, which determines the type of operations (additions, modifications, deletions) that can be performed on data.

Security Level ID	Security Level
0	None
1	Supervisory
2	Administration
3	Senior Instructors\Teachers
4	Junior Instructors\Teachers
5	IT\NYSC Staff
6	Guest

**Users Maintenance (Creating Users & Users Security Profiling)**

Current User: SysAdmin

OpName	SecurityLevel
abu	Supervisory
andrew	Junior Instructors
dannyk	None
diran	Supervisory
hanif	Guest
idu	None
tolu	Senior Instructors

Security Level of user: Supervisory

**Special Operations On A Selected User**

Remove User      Clear User Password

**Create A New User**

Add User      Save User      Cancel

Exit

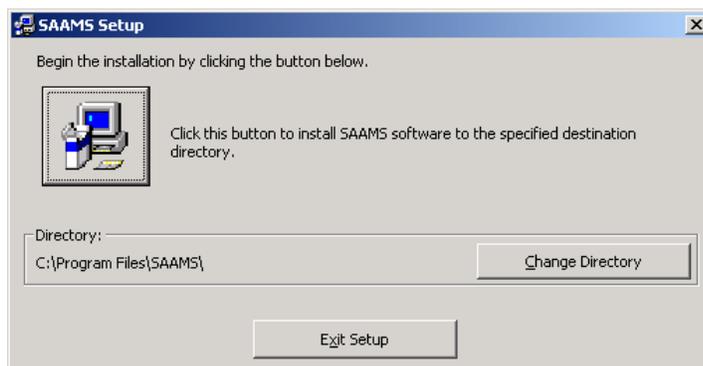
## 8 Installing BTS

### 8.1 Installing as a Single User

1. Insert installation cd labelled **BTS Full Version** into the cd drive. Installation should start automatically and display interface below.
  - If the installation does not start up automatically, open the cd contents and double-click **setup.exe**.



2. Click **Ok**. This displays the interface below.
3. Click **Change Directory** and change the directory to install BTS to **c:\zmal**, for convenience.
4. Click the button indicated on the top left hand corner to install BTS to the specified destination directory.
  - You will be prompted to create the destination directory specified in step 3 if it does not exist
  - If the destination directory exists you will be prompted to keep each existing file that will be replaced by the installation. Respond by clicking **No To All** to avoid prompting for every file that must be replaced.
  - **Ignore** any error resulting from copying files (usually support file).



5. On completion of the installation BTS will be registered on the Programs menu bar on the Start bar.
6. You can send the short cut on to your desk top by right clicking the icon under the BTS group and select Send To >> Desktop. The icon should be displayed on your desktop.

## 8.2 Installing for Multiuser operation

### 8.2.1 Installing on the Server

**Insert the CD labelled BTS Full Version into your cdrom drive on your server and follow the Steps 1 to 6 in the previous section.**

### 8.2.2 Installing Client\Front End components

**Install the CD labelled BTS Client Version into your cdrom drive on your workstation and follow the Steps 1 to 6 in the previous section.**

## 8.3 Starting BTS

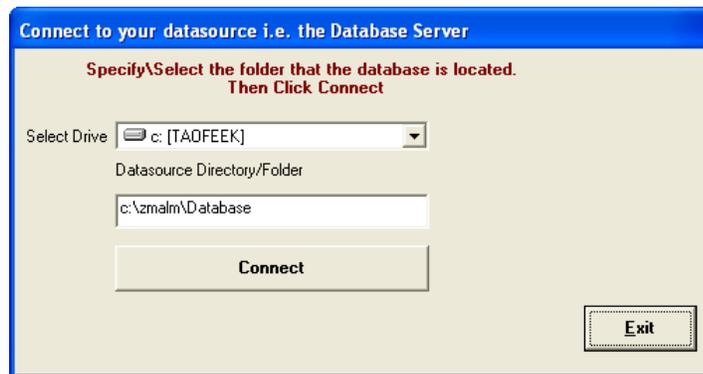
1. Select **BTS** from the BTS menu on the programs menu bar or
2. OR Double Click **BTS** icon on the desktop (you should have created the shortcut on the desktop).
3. Enter you user name; which is also called user account:
  - o Enter **sysadmin** if this is the first time you log in.
4. Enter your password, if you have a password for your user account.
5. Click Login (or press Enter on the keyboard).
6. The main interface is displayed as depicted below.



### 8.3.1 Registering BTS Datasource

The first time you start BTS after installation you may experience an error indicating that the data source cannot be found, which means the BTS data source is not properly registered for connection by the client front ends (usually this registration would have been done automatically if you installed as a single user or on the server). This problem may also be experienced if the data source has been moved to a different location since the last time you ran BTS. In the case of multi-user operation, the problem will always be experienced the first time you start BTS on a workstation after installation.

In each case you must specify the **location of your database to register the datasource**. The database will usually be located in the directory **Database** in the installation directory (i.e. **c:\zBTS\Database**). The interface to do this (depicted below) will be displayed when the problem occurs (or you can get at it by clicking **System Administration >> Register Datasource**)



1. Select the location of the data source (**on local computer if you are on the server OR on a computer on the network if you are on a workstation on the network**).
  - a. Select the Drive
  - b. Navigate, locate and select the folder\directory containing the database
2. Click **Connect** to establish connection with the source of data. You will be prompted appropriately that you have now established connection with the database.

#### 8.4 Specifying or Changing Your Password

Before you continue working with BTS it is recommended that you specify your password for your user account. This is one function every user (user account) of BTS can perform. Since passwords are secret to the user, even the system administrator should not be aware of other users' password. The system administrator(s) can only clear this password if the user forgets it, so clearing it will allow the user to specify another one.

The procedure for specifying or changing your password is simple.

1. Click **"Password"** on the main interface.
2. On the resulting enter your **Old Password** in the appropriate field. Leave blank if you do not have a password or you are specifying one for the first time.
3. Enter your new password in the field labelled **"New Password"**
4. Enter the new password again in the field labelled **"Verify"**
5. Click **"Click To Set New Password"**.
6. You will be prompted if the New Password and the Verify do not match exactly. You must re-enter both again to ensure registration of the password.

The next time you log on to BTS you must specify your new password to gain access.

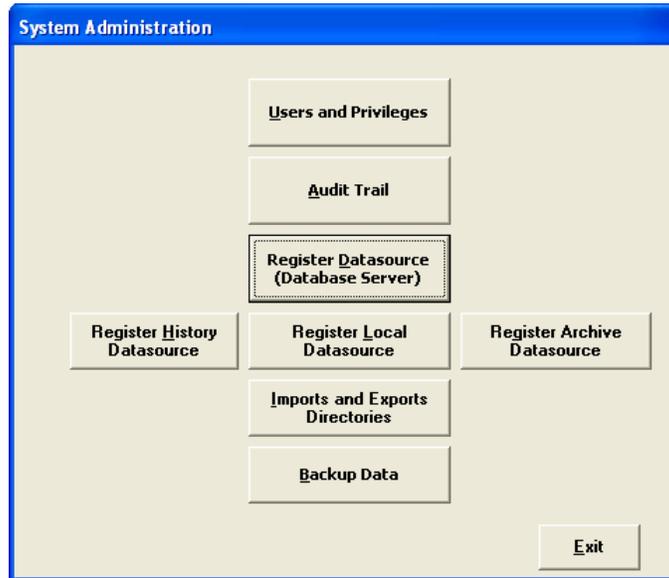


The image shows a Windows-style dialog box with a title bar that reads "Create new password \ Change your existing password" and a close button (X). The dialog is divided into several sections. At the top, there is a label "Current User" followed by a text box containing the text "sysadmin". Below this, there are three vertically stacked text input fields. The first is labeled "Enter Old Password (Leave blank if no password)". The second is labeled "Enter New Password". The third is labeled "Enter New Password again to verify". Below these fields is a button labeled "Click To Set New Password". At the bottom right of the dialog is an "Exit" button.

## 9 System Administration

BTS system administration functions are grouped into a sub-module labelled System Administration on the main interface. It provides for security and user profiling functions as well as audit trailing, backup administration and registration of data source. A user must have system administration privileges to access these functions.

Click **System Administration** on the main interface. This displays the interface below.

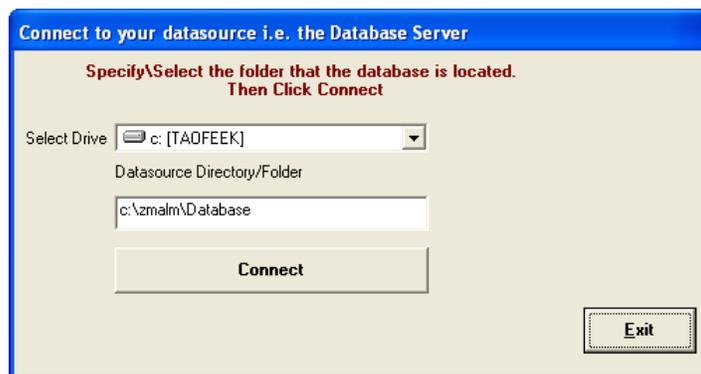


### 9.1 Registering Data Source

This provides the means to connect/reconnect to BTS data source via ODBC. You use it if the location has been moved to another directory on your workstation or to a different computer on the network (Note that these topics were dealt with in the previous chapter).

#### 9.1.1 To Register BTS data source

3. Click **Register Data source** on the System Administration interface.



4. Select the location of the data source (on local computer if you are on the server or on a computer on the network if you are on a workstation on the network).

- a. Select the Drive
  - b. Navigate, locate and select the folder\directory
5. Click **Connect** to establish connection with the source of data. You will be prompted appropriately that you have now established connection with the database.

Register History, Local and Archive datasource via the same procedure

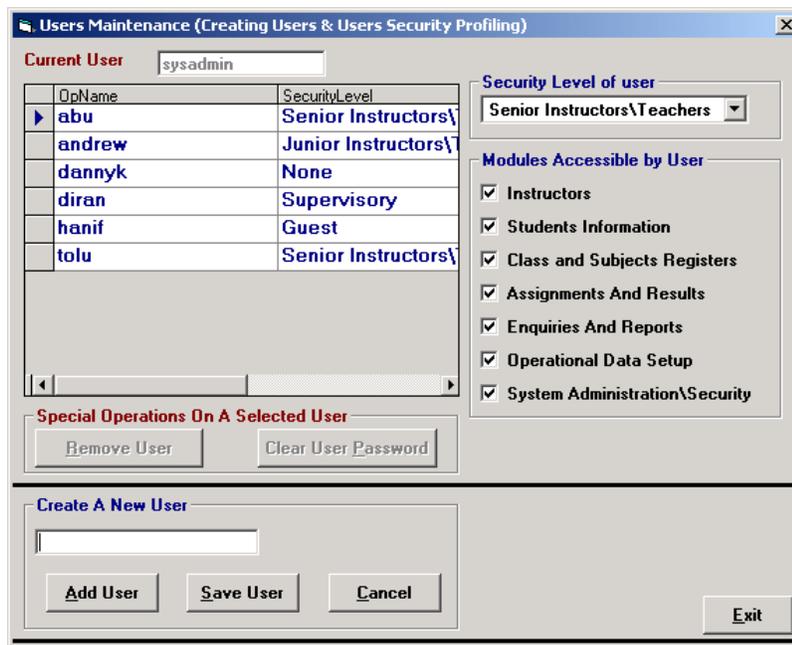
**These procedures must be repeated on every workstation on the network where BTS will be running, since they all will share the same data source on the server. The folder on server where the data and photos would be stored should have been mapped with an appropriate drive letter (e.g. h:) from each workstation.**

## 9.2 Users and Privileges

This utility allows you to do the following

- create new user accounts,
- remove an existing user,
- clear a user's password (should the user forgets his/her password)
- specify the security level of each user account.

Click **User and Privileges** on the System Administration interface to display the User Accounts interface below



### 9.2.1 To create a new user account

1. Click **Add User**
2. Enter the name of the user account in the text box labelled User Name
3. Click **Save User** to create the user and add to users list
4. Click **Finish** to complete the process and enable other utilities (e.g. Remove User & Clear User Password)

### 9.2.2 To remove a user account

5. Select the user from the list and click **Remove User**.

### 9.2.3 To clear a user's password

6. Select the user from the list and then click **Clear User Password**

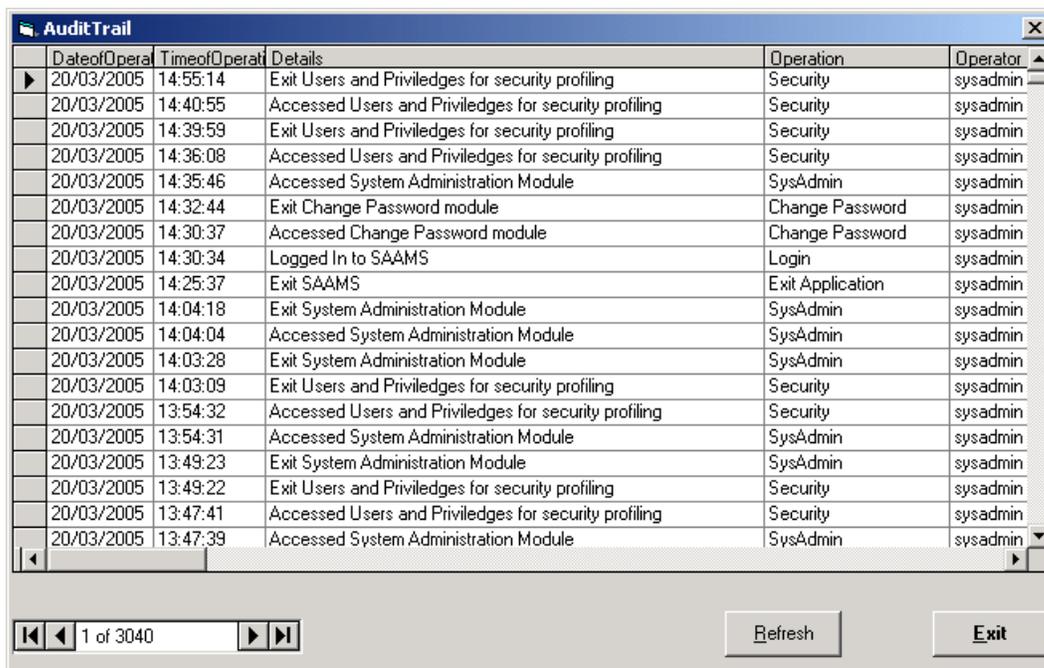
### 9.2.4 Set User Security Level

7. Select the user from the list.
8. Select the security level from the **Security Level of User** combo box.

## 9.3 Audit Trail

The Audit Trail is a log of information on key activities providing an effective tool to monitor activities on BTS. It captures the activities of each operator and each log is stamped with a date and time the activity took place.

1. Click **Audit Trail**. This displays an interface (below).
2. To view up to date activities, click "**Refresh**".
3. Click Exit to remove the interface.



Date of Operat	Time of Operat	Details	Operation	Operator
20/03/2005	14:55:14	Exit Users and Privileges for security profiling	Security	sysadmin
20/03/2005	14:40:55	Accessed Users and Privileges for security profiling	Security	sysadmin
20/03/2005	14:39:59	Exit Users and Privileges for security profiling	Security	sysadmin
20/03/2005	14:36:08	Accessed Users and Privileges for security profiling	Security	sysadmin
20/03/2005	14:35:46	Accessed System Administration Module	SysAdmin	sysadmin
20/03/2005	14:32:44	Exit Change Password module	Change Password	sysadmin
20/03/2005	14:30:37	Accessed Change Password module	Change Password	sysadmin
20/03/2005	14:30:34	Logged In to SAAMS	Login	sysadmin
20/03/2005	14:25:37	Exit SAAMS	Exit Application	sysadmin
20/03/2005	14:04:18	Exit System Administration Module	SysAdmin	sysadmin
20/03/2005	14:04:04	Accessed System Administration Module	SysAdmin	sysadmin
20/03/2005	14:03:28	Exit System Administration Module	SysAdmin	sysadmin
20/03/2005	14:03:09	Exit Users and Privileges for security profiling	Security	sysadmin
20/03/2005	13:54:32	Accessed Users and Privileges for security profiling	Security	sysadmin
20/03/2005	13:54:31	Accessed System Administration Module	SysAdmin	sysadmin
20/03/2005	13:49:23	Exit System Administration Module	SysAdmin	sysadmin
20/03/2005	13:49:22	Exit Users and Privileges for security profiling	Security	sysadmin
20/03/2005	13:47:41	Accessed Users and Privileges for security profiling	Security	sysadmin
20/03/2005	13:47:39	Accessed System Administration Module	SysAdmin	sysadmin

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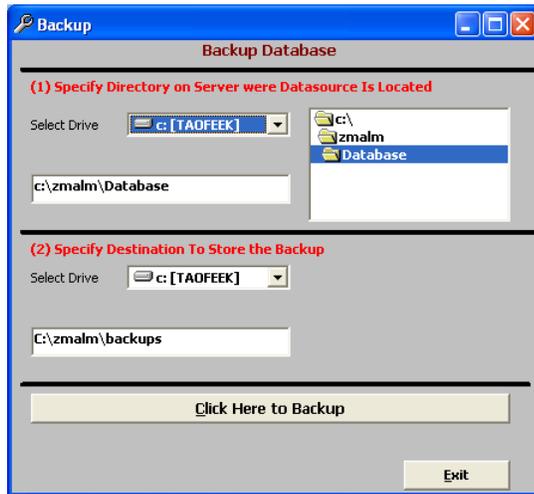
Refresh Exit

## 9.4 Backup

1. Click **Backup**, to display interface below
2. Select the Source Directory (Step 1)
3. Select the Destination Directory (Step 2)
4. Click **Click Here To Backup**.

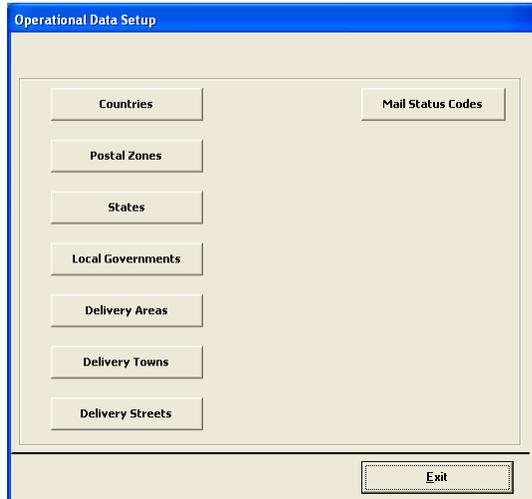
The backup will be copied to the destination path with the name **bkXXXXXX.mdb**, where XXXXXX is the short date format for the current date (e.g. bk110305.mdb). Therefore, if a backup

exists for the date you will be asked in step 4 to overwrite the existing backup or create a new one. If you avoid overwriting, the existing backup will be renamed (by post fixing with the current time) and a new backup created as **bkXXXXXX.mdb**.



### 10 Configuring BTS with Operational Data

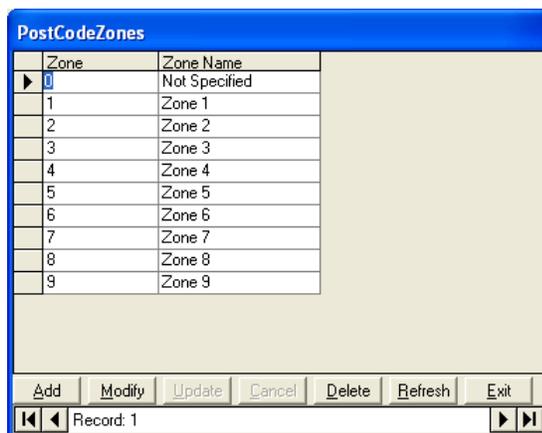
The **Operational Data** module is used to configure BTS with operational data, such as defining classes, instructor status, subjects and assignment grades. The interface is depicted and is obtained by selecting **Program Operational Data** on System Configuration Menu surface.



The following lists the operational data that need to be defined to configure BTS.

- List of Countries
- Postal Zones
- States
- Local Governments
- Delivery Areas
- Delivery Towns (with postcodes)
- Delivery Street
- Mail Status Codes

In each case, click the required button and Add or Modify information as required. The interface below is where you specify the Postal Zones (Click **Postal Zones**)



## **11 Using BTS**

To use BTS for any useful work you should have done the following

- Installed BTS on your computer and connected appropriately to the data source.
- Created all user accounts that will use BTS and define profiles and privileges for each.
- Configure BTS with operational data.

## **12 Appendix**