Hybrid Mail

Customer Guide

v1.6

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1.0 Hybrid Mail Overview

Hybrid Mail is a service that allows users to send documents, invoices, and letters directly and securely from their computer or back-office systems via the internet to Whistl. The item is printed, fulfilled, and mailed from one of our UK production centres. With easy-to-use software, offering security and flexibility, along with the highest levels of quality and document integrity, it couldn't be easier.

1.1 Service aim

The service aim is for Hybrid Mail items to be processed, handed over and delivered within 2 to 3 days (with collection of the printed and fulfilled items taking place on day 0).

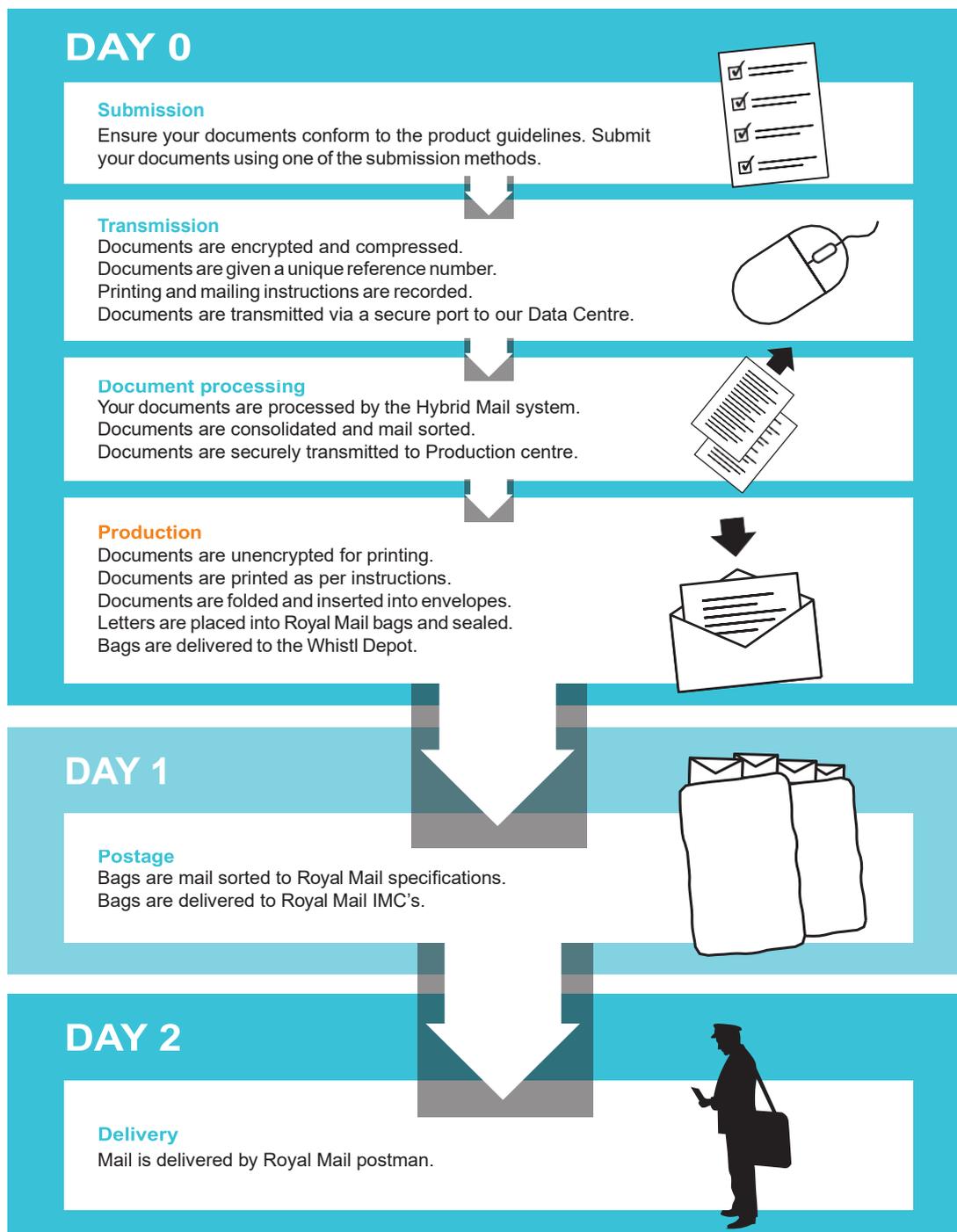To send your mail using Hybrid Mail 2-day service, all of your items must be submitted by 16.00 on day 0.

The service aims are targets only and the time and date for processing and delivery are not guaranteed. Whistl will not be liable for the speed of collection, processing, handover, and delivery which are affected (directly or indirectly) by any event or circumstance outside Whistl's reasonable control (see below for more details) or by an act or omission of the Customer (or its employees, agents or contractors). The dates for collection, processing, handover, and delivery exclude any day which is a public holiday in any part of the United Kingdom.

1.2 Force Majeure Events

Whistl is not liable for delay in performing, or failure to perform, any of its obligations if such delay or failure results from any event or combination of events adversely affecting the ability of Whistl to perform its obligations where such event arises from or is attributable to acts, events, omissions, or accidents that were beyond the reasonable control of Whistl. These include (without limitation) strikes, lock-outs or other industrial disputes (whether involving the workforce of Whistl or any other party), failure of a utility service, disruption to transport network, act of God, war, riot, civil commotion, epidemic, pandemic, acts (or threat) of terrorism, malicious damage, compliance with any law or governmental order, rule, regulation or direction, acts of local or central government or other competent authorities, seizure or forfeiture under legal process, inherent liability to wastage in bulk or weight, faulty design, latent defect or inherent defect, vice or natural deterioration of the items, insufficient or improper packing, insufficient or improper labelling or addressing, accident, breakdown of plant or machinery, fire, earthquake, explosion, flood, storm, ice, frost or default of Whistl or its carriers or subcontractors and any event or other consequences arising as a result of or in connection with the full or partial withdrawal of the United Kingdom after the transition period from the European Union.

2.0 Hybrid Mail Process

2.1 Hybrid Mail process – 2 days *

DAY 0

Submission
Ensure your documents conform to the product guidelines. Submit your documents using one of the submission methods.

Transmission
Documents are encrypted and compressed.
Documents are given a unique reference number.
Printing and mailing instructions are recorded.
Documents are transmitted via a secure port to our Data Centre.

Document processing
Your documents are processed by the Hybrid Mail system.
Documents are consolidated and mail sorted.
Documents are securely transmitted to Production centre.

Production
Documents are unencrypted for printing.
Documents are printed as per instructions.
Documents are folded and inserted into envelopes.
Letters are placed into Royal Mail bags and sealed.
Bags are delivered to the Whistl Depot.

DAY 1

Postage
Bags are mail sorted to Royal Mail specifications.
Bags are delivered to Royal Mail IMC's.

DAY 2

Delivery
Mail is delivered by Royal Mail postman.

* The times and dates are targets only and the time and date for processing and delivery are not guaranteed. Whistl will not be liable for the speed of collection, processing, handover, and delivery which are affected (directly or indirectly) by any event or circumstance outside Whistl's reasonable control (see below for more details) or by an act or omission of the Customer (or its employees, agents or contractors). The dates for collection, processing, handover, and delivery exclude any day which is a public holiday in any part of the United Kingdom

3.0 Hybrid Mail Benefits

The Hybrid Mail product range offers its users a range of benefits including:

- **Reduced operational costs** – optimise document outputs to achieve the maximum cost savings on labour, consumables, print and postage
- **Reduced investment** – reduce investment into expensive production machinery such as folding and inserting machines and franking machines
- **Reduced maintenance costs** – no need to maintain expensive and/or outdated machinery
- **Increased productivity** – no longer manually prepare documents to be posted, so more time can be spent carrying out core tasks and increasing productivity
- **Increased document integrity** – track and trace items through the production process and ensure that all items are processed
- **Improved management information** – greater visibility of all documents produced and on-demand management information
- **Improved document quality** – control your letterheads, stationery and attachments and achieve high quality and consistent production of documents
- **Faster communications** – get documents to recipients quickly and securely

4.0 Submission Methods

There are a number of ways you can send documents to the Hybrid Mail service:

You-Send/"portal" – for documents created on the desktop, You-Send is a Microsoft Windows print driver that supports the manual submission of documents. The You-Send service is like printing to the local printer in your home or office. Once the Hybrid Mail printer has been selected you can choose your print options and add any letterheads or attachments before sending for printing. Submitted documents can contain single or multiple mail pieces. Alternatively, a PDF can be uploaded directly into the portal.

Auto-Send/"Hot Folder" – for documents created by your organisation's back-office systems, Auto-Send/ Hot Folder is a service that supports drag and drop submission of documents via SFTP.

The Auto-Send/Hot Folder Service allows PDFs to be dropped into a folder which will govern its production method (i.e., Colour Duplex, Mono Simplex etc).

Submitted PDF files can contain single or multiple mail pieces. Our automated scripts will then process these in accordance to set parameters and reports sent after processing for consolidation.

For full details of using the software and technical requirements please refer to our user guides.

5.0 Key Features

5.1 Online tracking and document management

Within the secure Hybrid Mail portal, users are able to track and manage documents that have been submitted. Users can delete their submitted records from the print queue for that day. All documents are available for six months after submission and the archive can be searched using a number of criteria including the reference or job number, recipient's name or any line within the address block.

5.2 Electronic letterheads and attachments

Letterheads and attachments can be added electronically to your documents for later printing. To do this you simply upload a PDF of the letterhead or attachment to the secure online portal from where they can be added to documents as part of the submission process. Letterheads and attachments can then be made available to your entire organisation or to specific departments and users.

5.3 User management

New users and departments can be easily created with specific privileges applied to different levels. This function gives you full control over the stationery and attachments that staff can use in document creation. You can also control the printing options as well as letterheads and attachments that users can access to ensure appropriate options are applied.

5.4 Template driven rule creation

The 'document type' functionality allows the user to create a set of business rules around a specific template, these rules include:

Number of pages per document: This can be set to 1 page, 2-page etc or a section of text can be used to split each document out for a mixed number of pages

Address Capture Area: Define where your address data sits on the page. The system can then move it to the standard position for the window envelope

Print options: simplex/duplex and mono/colour

Paper options: selecting letterhead or plain paper

Attachments/inserts: adding any electronic or pre-printed attachments or inserts

5.5 Management information

The solution provides full management information on the documents you have sent allowing you to monitor and control the printing and postal costs within your organisation. Information can be provided at an organisation, department or user level as required.

5.6 Document integrity

Our backend production process operates full tracking of documents from initial receipt through to successful despatch with 100% document integrity being assured at individual page level.

Every received document is assigned a unique identifier. This identifier is added to every front page of the document in the form of a non-intrusive 2D barcode which allows each document page to be identified and tracked through the production process by real-time reference to a matching database entry. This process also ensures that the collation of the document is performed correctly in terms of sequence and overall set integrity, and that all the documents you send have been printed and despatched.

5.7 Security

All the data contained in your documents is subject to strict data and physical security processes, a high-level overview of which is detailed below.

5.7.1 Data security

All parts of the software have full access control measures and users are required to login using a username and password

- All data is compressed and encrypted to 128 bit and all document transition takes place over a secure HTTPS or SFTP connection. The data remains encrypted until it is printed
- The server receiving the data is housed in a secure, hosted, data centre
- This unprocessed data is stored for 6 months before it is deleted, and space overwritten on the servers

- All information submitted to, and processed by, the Hybrid Mail system will be treated as confidential, as per the Whistl Protection of Information policy

- The production site is a highly secure site with CCTV, 24-hour security, alarms, secure perimeter fencing, personnel screening, and visitor access control
- The production process is fully accredited to ISO27001:2013 (information and data security)
- All authorised personnel are fully compliant with the Mail Integrity Code of Practice and are subject to vetting and CRB checks before employment in accordance with C&CCC (APACS) Standard 55
- All authorised employees are mandated to sign a Non-Disclosure Act as part of their contract of employment
- The only human intervention in the process is when printed data is transferred to automated fulfilment equipment
- For full details of our security and data protection process please contact Hybridmail@whistl.co.uk

5.8 Other features
The other features of the product include:

- **Full audit trail** – all your documents have a full audit trail that details when they were sent, where and who to, and at what time they were submitted and printed
- **24-hour availability** – the system is available 24 hours a day 7 days a week to ensure that customers can access the system at any time to take advantage of the production window or to carry out document activities at non-peak times of the day
- **Robust and reliant** – the system is designed for full resilience and robustness and has back up facilities in place in the very rare event that part of the solution should fail
- **Scalability** – the solution is fully scalable and can handle all your document requirements however many items you send
- **Custom look and feel** – the print driver and the user website can be tailored to suit your own organisation's image (reskinning), this includes adding your logo and corporate colours (costs may apply)
- **Ease of use** – all the Hybrid Mail applications and interfaces are intuitive and easy to use even for those who are non-IT literate.
- **Workflow authorisation** – workflow processes can be set up for any documents that need management approval before being posted
- **Select your posting dates** – select the date that you want your letters posting using a simple calendar system
- **Extracting document references** – we can extract specific pieces of data from your document, such as a reference or invoice number, which can then be used to search for the document in the document store, or be provided as part of your management information

6.0 Product Specifications

6.1 Printing
All documents can be printed as
- Colour or mono documents
- Single or double (duplex) sided Printing quality is set at 600DPI

6.2 Paper
We use standard A4 90gsm brilliant white paper, all paper used is made from FSC sustainable sources.

6.3 Envelopes
We use standard white C5 windowed envelopes; all envelopes are made from FSC sustainable sources.

6.4 Indicia
Whistl will automatically print the Whistl indicia onto the envelope; this will be positioned in the top right corner of the envelope.

6.5 Return address
Whistl will automatically print a generic return address onto the back of all envelopes; the return address will be the designated returns office of Whistl. All items returned to this address will be securely destroyed as part of our returns process.

We are able to offer our customers a returns service where we return the items unopened directly to the customer either in physical or electronic format. If you require this service, please contact your Whistl account manager.

7.0 Entry Qualifications

7.1 Minimum volumes
There are no minimum volumes to using the Hybrid Mail products.

7.2 Addressing standards
All addresses must have a full and accurate address including postcode where possible. If your document does not have an accurate address, then we cannot guarantee that it will be delivered within our 2 day SLA.

7.3 Address fonts
Where possible all addresses must contain a recognised OCR font. A list of recommended typefaces can be found below:

Arial 10-12pt regular
Avant Garde 11-15pt regular
Century Schoolbook 10-11pt roman and bold
Courier 10-15pt regular and bold
Courier New 10-15pt
Frankfurt Gothic 10-12pt
Franklin Gothic 11-14pt book
Geneva 10-12pt regular
Helvetica 12-14pt regular and bold
News Gothic MT 10-12pt regular and bold
Universe 10-15pt regular and bold
Verdana 10-12pt regular
Letter Gothic 12pt regular
Lucinda Console 12pt regular
Lucinda Sans Typewriter 12pt regular
Monaco 12pt regular
OCR B 12pt

Typefaces with the following characteristics are also suitable:

- **Size** – Height: 2mm min; 7mm max. Width: 7mm max
- **Dimension** – minimum ratio of lower-case height (b) to upper case height (a) of between 2:3 and 3:4. A ratio of width (c) to height (a) of approximately 2:3
- **Consistency** – each line of the address should be in the same typeface and size
- **Quality** – characters must be complete, clear, uniform and of high resolution with individual stroke thickness of between 8% and 16% of the height of the character
- **Contrast** – there should be a contrast between the characters and the background on which they are printed of at least 50% (55% if it is to be read through a window)
- **Character spacing** – there should be a fixed pitch of between 10 and 12 characters per inch (or between 15 and 8 point size), with clear vertical gaps of at least 0.25mm between the extremities of adjacent characters. If you are using proportionally spaced text, please ensure you keep spacing of at least +0.75 as this significantly improves the rate at which addresses can be read
- **Line spacing** – allow uniform spacing between all lines of the address of at least 1mm (5 points)

7.4 Document template
All items sent using the Hybrid Mail service must follow the correct template so that we can ensure the address is always visible in the window and that we are able to add the required production markings.
The following rules must apply:

- There must be a clear margin of 10mm at the top only

- The address box must be no larger than 90mm wide and 48mm tall. It must be positioned 18mm from the left side of the document and 43mm from the top of the document.

- There must be a clear space within the document window for the CBC & 2D barcode this will be 10mm high from the bottom of the address window and cover the full width 80mm of the document window

See the document template guide overleaf for the full description, dimensions, and format.
The system can automatically amend your document to fit within this template without the need to make amendments to the source document.

10mm clear margin for production marks

43mm

18mm

ADDRESS AREA

90mm W X 48mm H
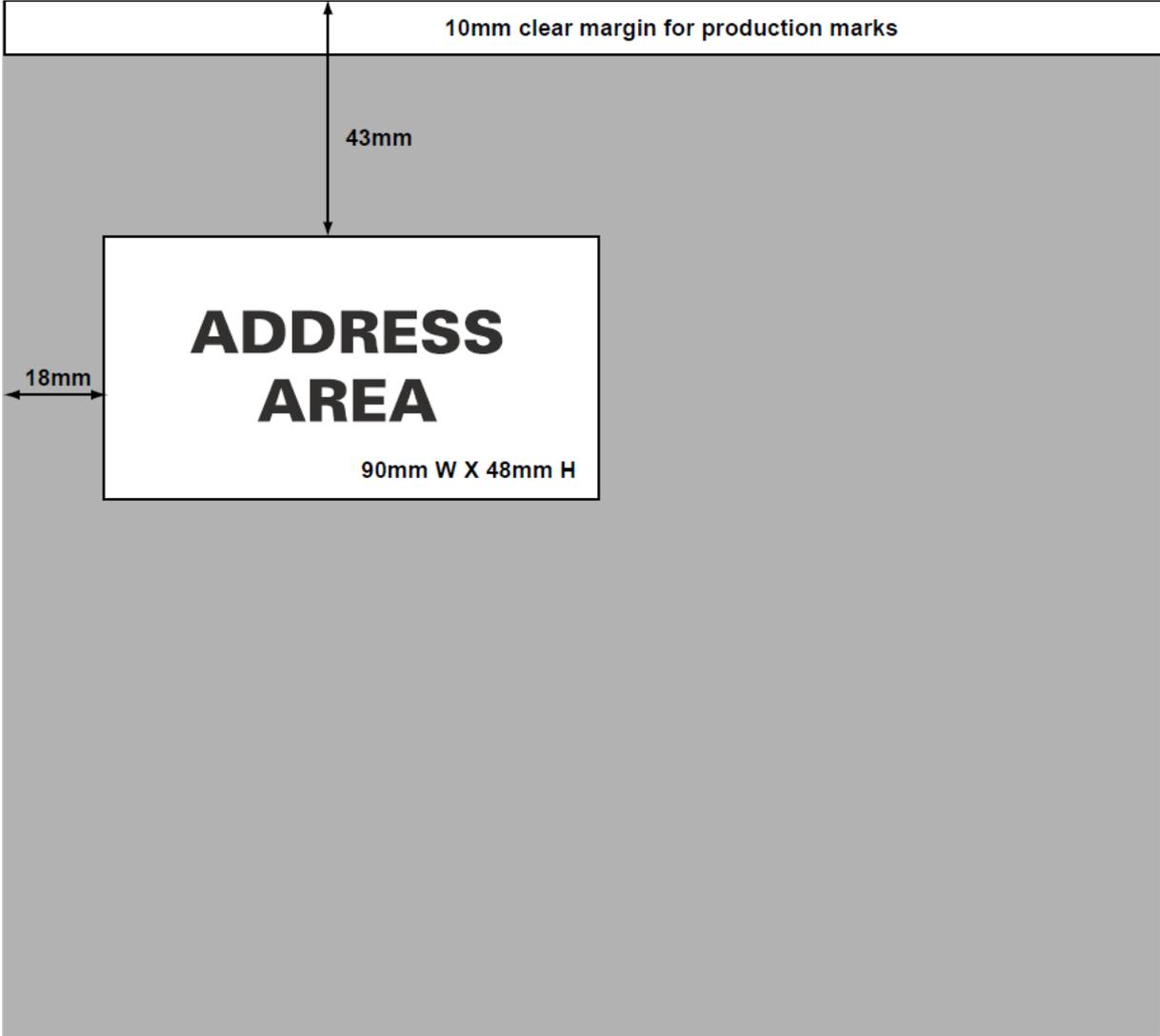
8.0 Forecasting Volumes

Customers are not generally required to forecast volumes in advance however we appreciate 2 days' notice of any mail volumes that exceed the customer's normal mailing level.

9.0 Technical Support

Our customer services and technical support team are available to assist you with any questions or issues you have. You can contact them by email **Hybridmail@whistl.co.uk**

There is also a full frequently asked questions section online at https://www.whistl.co.uk/

10.0 Data Protection

10.1 Data Processing carried out by Whistl

This section relates to the parties' obligations under Data Protection Legislation which means all applicable data protection and privacy legislation in force from time to time in the UK including the Data Protection Act 2018 and the Privacy and Electronic Communications Regulations 2003 as amended and any other laws, regulations, and secondary legislation, as amended or updated from time to time, in the UK.

The following table sets out the personal data that Datagraphic processes for the Customer in relation to the submission, document processing and production of mail items ('Hybrid Production'):

Data subjects	Recipients of the Customer's mail items.
Categories of Data	Data subject's name and address and any personal data contained in the contents of the mail item.
Processing Operations / Subject Matter	The processing operations are as follows (further detail is set section 2 of this customer guide): • Recording • Storage • Retrieval • Use • Disclosure by transmission • Erasure
Purpose	The personal data is processed during the process of printing the mail item and inserting it into the envelope.
Duration	The duration of the processing is as follows: • Printing and fulfilment takes approximately 2 seconds per mail item; • The production data, including name and address and the contents of the communication, is stored for a period of 2 years.
Deletion of Processed Data	At the end of these periods, the personal data is automatically deleted.

The following table sets out the personal data that Whistl processes when providing delivery services for the Customer:

Data subjects	Recipients of the Customer's mail items.
Categories of Data	Data subject's name and address as printed on the front of the mail item.
Processing Operations / Subject Matter	The processing operations are as follows (further detail is set out in this table): • Recording • Storage • Retrieval • Use • Disclosure by transmission • Erasure
Purpose	Whistl processes personal data for the following purposes: • Address read manually or by sortation machine in order to sort the mail to the correct geographical location • Image of the front of the item is recorded, stored using a 3rd-party application, and retrieved to assist with delivery and invoicing queries • Where the video encoding service is used an image of the name and address on the front of an unsorted item, which cannot be machine-read, is recorded, and transmitted to our third-party processors to be read
Duration	The duration of the processing is as follows: • Processing for sortation takes less than 2 seconds • Images of the front of the envelope are stored for 90 days • Video encoded images are accessed for less than 5 minutes
Deletion of Processed Data	At the end of these periods, the personal data is automatically deleted.
Third party processors	Whistl uses third party processors to store envelope images and also in relation to the video encoding service. Details of the third party processors and their activities is set out below.

10.2 Third Party Processors

The following processor carries out the Hybrid Production:

Name of Sub-processor	Datagraphic Limited
Location	United Kingdom
Categories of data processed	Data subject's name and address and any personal data contained in the contents of the mail item.
Details of processing	Datagraphic carries out the entire Hybrid Production process set out in **section 10.1**
Purpose	The personal data is processed during the process of printing the mail item and inserting it into the envelope

Where the video encoding service is used, Whistl uses the following third parties to carry on processing on its behalf:

Name of third party processor	PostNL Data Solutions BV	Straive	Prime Vision BV
Location	Netherlands	Philippines & Vietnam	Netherlands
Categories of data processed	An image of the name and address on the front of unsorted items which cannot be machine-read.	An image of the name and address on the front of unsorted items which cannot be machine-read.	An image of the name and address on the front of unsorted items.
Details of processing	PostNL Data Solutions receive the personal data from Whistl into their systems and allow personnel from Straive access to read the personal data.	The image is made available by PostNL Data Solutions to view the address.	Prime Vision provide an application for the storage of images.
Purpose	Receipt of the personal data to be read by personnel from Straive (see below). Image is auto deleted once used.	To manually read addresses which cannot be machine-read. The address is then sent to the Supplier and the image of the Personal Data is deleted.	To assist with delivery and invoicing queries.

10.3 How Whistl treats Personal Data

- Both of Whistl and the Customer will comply with all applicable requirements of Data Protection Legislation.

- In respect of Hybrid Production, the Customer is the data controller and Datagraphic is the data processor.

- In respect of delivery services, although the overall purpose of the data processing described above is agreed with the Customer (to deliver relevant items provided by the Customer to the addressees of each item), Whistl retains control over the manner in which it processes the relevant personal data in order to fulfil the purpose concerned. Accordingly, Whistl will in general be acting as a Data Controller when processing personal data for delivery services as set out above, in line with the relevant guidance from the Information Commissioner in the UK (https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/controllers-and-processors/controllers-and-processors/how-do-you-determine-whether-you-are-a-controller-or-processor/#2).

- The table above sets out the scope, nature and purpose of processing, the duration of the processing and the types of personal data and categories of data subject which are subject to processing.

- The Customer confirms that any personal data provided to Whistl by the Customer or on its behalf has been collected and disclosed in accordance with the Data Protection Legislation. When using Whistl's

services, the Customer will take reasonable steps to ensure that no irrelevant or unnecessary information about individuals is provided to Whistl for or on behalf of the Customer.

- To the extent that Whistl processes any personal data on behalf of the Customer in connection with the performance by Whistl of its services (in circumstances in which the Customer controls both the purpose and the manner of the processing and the processing is carried out by Whistl solely on behalf of the Customer, it will:

  ▪ Process the personal data only on the written instructions of the Customer unless Whistl is required to process it for other purposes by any laws of the European Union which are applicable to the services to process. Whistl will give the Customer notice of that requirement unless it is required not to do so.

  ▪ Maintain appropriate physical, technical and organisational measures, to protect against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures.

  ▪ Ensure that all personnel who have access to and/or process personal data are obliged to keep the personal data confidential.

  ▪ Transfer personal data outside of the European Economic Area only where:

    o Appropriate safeguards in relation to the transfer are in place.

    o The data subject has enforceable rights and effective legal remedies.

    o Whistl complies with its obligations under the Data Protection Legislation by providing an adequate level of protection to any personal data that is transferred; and

    o Whistl complies with reasonable instructions notified to it in advance by the Customer with respect to the processing of the personal data.

  ▪ Assist the Customer, at the Customer's cost, in responding to any request from a data subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators.

  ▪ Notify the Customer within 24 hours on becoming aware of a personal data breach.

  ▪ At the written direction of the Customer, delete or return personal data and any copies to the Customer on termination of the agreement unless required by any applicable laws to store the personal data.

  ▪ Maintain complete and accurate records and information to demonstrate its compliance with the Data Protection Legislation; and

  ▪ The Customer generally authorises Whistl to engage processors to process personal data. A list of the processors is set out in the section above. This list will be updated by Whistl and Whistl will give the Customer notice of any proposed change. If the Customer reasonably objects to a change, Whistl may either (at its option): (i) give the Customer an option to pay for the provision of the service without the use of the new processor; or (ii) terminate the provision of the affected service.

Whistl will share the Customer's data with credit reference agencies who may share that data with other organisations to assess credit risk. For more details, please see https://www.experian.co.uk/crain/index.html

Whistl Hybrid Mail Customer Guide Version Control

Document history

Date	Version No.	Section Revised	Revision Summary
24/10/2019	V1.0	All	Due to changes to our brand design, the changes made were for design purposes only.
10/03/2020	V1.1	All	Updated
05/02/2021	V1.2	10.0 Data Protection	Amendments to Data Protection section
06/10/2022	V1.3	V1.3	Amendments to terms on third-party data processing
21/11/2022	V1.4	Whistl Hybrid Mail Customer Guide Version Control	Change of address
26/07/2023	V1.5	10.0 Data Protection	Updated throughout
23/01/2024	V1.6	All	Design Changes

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