Royal Mail Mail Mailmark®

PDF Report User Guide

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Summary of changes V1.2 to V1.3 28 October 2021

- 1. Active Summary Report (daily file): The Header date on the PDF will show the date for which the report has been generated. Previously the date reflected the latest eManifest handover date.
- 2. **Historic Summary Report (weekly file):** The Header date on the PDF will show a 9 day date range for historic eManifests, irrespective of the handover dates of closed eManifests in this period.
- 3. Addition of a Change Control log page at the end of the document.

Summary of changes V1.1 to V1.2 20 April 2021

4. Re: Not seen, not expected to be seen. Addition to FAQ's and insertion of 'not' to the detail table

Next release date to be confirmed.

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1. Introduction

1. Overview

Royal Mail has developed a solution whereby we will provide, upon request, Mailmark[®] customers with details of the performance of their mailings through provision of a PDF file.

Those customers wishing to receive item level data should request this separately. Data will be provided in a variable length file, in a format known as CSV (Comma-Separated Variable length) with a header record giving a name to each field. Software, purchased or developed in-house, can be tailored to provide performance detail at item level for all items listed on an eManifest.

2. Difference between PDF and Mailmark Direct Data reports

PDF reports

- These are most suitable for customers wanting to see, at a glance, how their mailings are performing. They are the most simple and closest replication of the preceding reports which, as previous, are accessed through www.royalmail.com or www.royalmailwholesale.com.
- These PDFs provide clear graphic visuals (through graphs and numeric values) of mailing performance, mail seen (volume and %), predicted delivery and compliance issues e.g. data issues.
- There are no hyperlinks, all the totals are clearly visible in the daily and weekly pdf.

Mailmark Direct Data (MDD) - raw .csv format

- This option is more suitable for customers who use and manipulate raw data or create personalised customer reports on a daily basis.
- All the data for <u>all</u> items posted using Mailmark is included in the file, this data is raw and simply separated by commas (.csv).
- A customer has to be able to
 - a. access the file(s) on our server using Secure File Transfer Protocol (SFTP) systems and,
 - b. open the file(s) using tools such as WinSCP or FileZilla and
 - c. convert the data string into a file which can be viewed and used within their system.

3. Purpose

This document is to provide customers and interested parties guidance on:

- requesting Mailmark PDF reports,
- understanding those reports and
- identifying opportunities to collate reports through an existing common Participant ID.

4. Intended Audience:

- any customer who wishes to receive performance reports for live and historic mailings or,
- any Mailmark user.

5. Important clarifications

- These PDF files have no interactive links or features.
- The information within the reports mirrors that displayed previously through www.royalmail.com and www.royalmailwholesale.com



2. Process for requesting access to reports

The process below outlines how to request, and access, a daily PDF extract of your reports.

The process is as follows:

1. Request Mailmark PDF reports from Royal Mail.

Customer (Mailmark User) contacts mailmark@royalmail.com and provides;

- a. Mailmark Participant ID(s) and Participant Name(s)
- b. Royal Mail Account Manager
- c. Company / Business name
- d. Contact details including name, email address, contact number, job title
- e. Confirmation that the email address provided has been registered on www.royalmail.com as a business user

2. Royal Mail will validate the request by checking:

- a. The company name is linked to the Participant ID for which PDF reports have been reguested
- b. The user name (email address) provided is linked to the Participant ID
- 3. Royal Mail will action the request.
- 4. Royal Mail will notify the customer when set-up has been completed.
- 5. Reports will be available the following day from 12 noon.
- 6. It is strongly recommended that prior to accessing your PDF reports, or in the event of data not showing, you clear your cache / browsing history.

Please note:

- Set up process: This can take two working days.
- **Registered users:** If the User is not registered on <u>www.royalmail.com</u> as a business user the request cannot be actioned.
- **Restricting report access**: The Bill Payer in a Supply Chain still has the option to request restricted access to report information for the other Participants.
- **Report visibility**: Customers will continue to see information for all Supply Chains they are part of, unless the Bill Payer advises otherwise.
- **Data collation**: Report data is not collated on Public Holidays or Sundays.
- **Working days**: Public Holidays and Sundays are not classed as working days. This needs to be factored in when looking at the 5 days an eManifest is classed as 'open' or when viewing 'historic' data.



3. Accessing Reports

PDF reports can be accessed via www.royalmail.com by users linked to their Mailmark Participant.

- 1. Go to www.royalmail.com
- 2. Select 'Log in' at the top right



- 3. Enter the email address which is as below and click 'Log in'
 - a. registered as a business user on this portal
 - b. linked to the Mailmark Participant ID
- 4. Go to My Account



5. Select **Access Mailmark** and click on the hyperlink



6. Your **Report page** will be visible





7. Select View Supply Chain Reports on the left hand menu



- 8. You have the option to select two PDF report types;
 - a. Active this is for postings which have been uploaded within the last 5 days.
 - b. **Historic** this is for postings whose eManifests have closed within the previous 9 days but are no older than 14 days.

Reporting Dates explained:

Link to download file within the 'Supply Chain Reports section': This provides the date on which the most recent file was generated. The reports are generally available after 12 noon so if you log on and see yesterday's date then the most up to date files have not been generated.

Date on the header in the Active PDF report. This will show the date for which the data has been generated. If today's date is 22 October 2021, the date of 22 October 2021 will show in the header.

Date on the header in the Historic PDF reports. This will show any historic reports for eManifests closed within the last 9 days. The file header will show the 9 day historic date range e.g. *The historic report run on 26th November will have the header dates as 10th to 19th October 2021.*

Report timings: Data is available for the previous day and part of the day the reports are being viewed. Reporting is provided from 6am 10th October until 6am on 11th October. The report will be available to view from c12noon.

General: Please note: If no eManifests were uploaded no data will show.

Additional information:

Mailmark reporting documentation: This section will give you access to User Guides. View Today's Upload statistics: This will show the eManifests uploaded in the previous 48 hours.

Manage Users: The primary Mailmark report user can add or remove users.

Request information: An online form can be completed with any queries and a response will be received from the Mailmark team.

Legacy reports: These were available until 31st January 2021.



4. PDF Report overview

Reports available

The data will be provided through two reports using data retrieved Monday to Saturday.

1. Active - these are your open eManifests

These are live mailings with a handover date within the last 5 days.

All users will be presented with a static report with a pie chart which provides a visual summary detailing successful mailings, mailings with issues and mailings with significant issues.

The user will be further able to view Predicted delivery, Volume & Performance metrics for active customer eManifests.

2. Historic - these are your closed eManifests

These provide 9 days of historic data.

This reports shows a summary for mailings which have been handed over later than 5 days and within the last 14 days.

The report will provide a summary of eManifests, details of eManifests and an unManifested item report.

Frequency

1. Active

Daily on Monday to Saturday.

2. Historic

Weekly on a Friday.

Considerations:

- 1. The 'Handover' date is the day on the eManifest which is the date Royal Mail receives the mail from the customer.
- 2. Date format is DD/MM/YYY
- 3. Sorting and Ordering of data: eManifest detail is sorted in ascending order of handover date. Potential unManifested is sorted by highest volume / total of unManifested volume.
- 4. Dashboard fuel dial and % values match those on the eManifest summary page
- 5. Performance, Predicted Delivery and Mail Seen graphs are at Participant ID level (i.e. a summary of all your eManifests) and not broken down by individual eManifests.
- 6. Reports received on a Monday will include data from Saturday and Sunday.
- 7. Public Holidays / Bank Holidays are not classed as working days.
- 8. Each version of the active reports will be a snapshot of the previous 24 hours of cumulative data.
- 9. When viewing historic reports on a Sunday data will be available up to Friday.
- 10. When viewing reports on a Saturday, data will not be available until the Monday.
- 11. PDFs should be downloaded and stored by the recipient as will be removed as follows.
 - Summary Reports are removed & replaced with the updated file the following day,
 - Historic reports removed weekly and replaced each Friday.

If mail has been handed over between 14 and 90 days of the handover date, by exceptional request a request can be made to your Royal Mail Account Manager to provide data, if available.



5. Daily - Active Summary report

Report breakdown for the Mailmark Active Summary Report

There will be four sections of reporting:

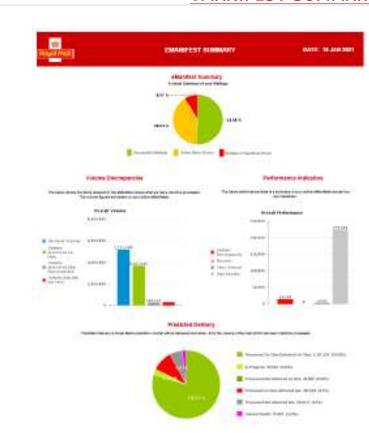
- 1. eManifest Summary
- 2. eManifest Details
- 3. Potential UnManifested Report
- 4. Advertising Mail (Admail) Report

1. eManifest Summary tab

The recipient will receive a static report with a pie chart which provides a visual summary of their mailings.

- The pie chart details a high level overview of whether a mailing has had issues or not.
 - o **Green** indicates mailings are successful with no issues.
 - o Amber indicates that there are issues which should be looked at.
 - Red indicates significant issues.
- The user will be able to view Predicted delivery, Volume & Performance metrics for the active eManifests

eMANIFEST SUMMARY TAB - full view



This report provides information on the overall combined and summarised performance of all your active mailings for the date indicated on the PDF.

Summary of all eManifests

The Red, Amber, Green split, gives visibility, as a %, of the overall performance of your combined Supply Chains and eManifests.

Volume indicators

The vertical graphic show the overall volume of mail declared, seen and processed for the combined Supply Chains.

Performance indicators

The vertical graphic shows the number of items, by category, which have issues either with the data, format, product chosen or item ID's uploaded.

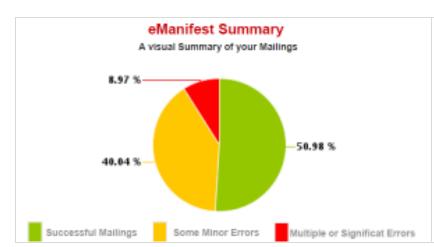
Predicted Delivery indicators

The last pie chart shows you, for the items seen, what the expected delivery pattern is. This includes items being delivered on time, items seen but for which there is no final track detail and those items seen, and processed, late.



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Issue: 22/11/2021 Effective: 10/12/2020

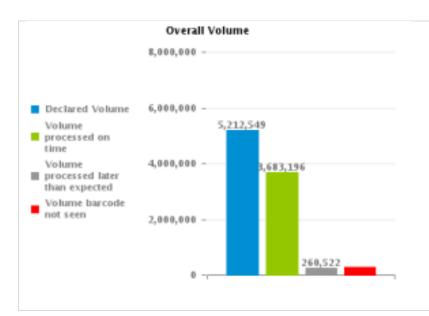


SUMMARY

Green The % of your mailings which had no processing or performance issues.

Amber The % of your mailings which may have had some issues but not to the extent that adjustments are possible.

Red The % of your mailings which require some attention as there were processing or performance issues. Adjustments are likely.



VOLUME INDICATORS

Declared volume:

Volume which has been declared on the eManifests.

Volume barcode not seen:

This includes the number of items we did not see/barcodes we did not read on our automation.

This volume is the total volume including those items which were due to be processed at a Mailmark Centre with no automation.

Volume processed later than expected:

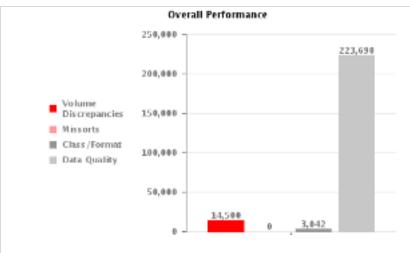
The mail was handed over to time but was not processed as expected.

This could be due to, for example: a late handover, incorrect handover date or operational issues.

Volume processed on time:

Items processed as expected for the service chosen.

PERFORMANCE INDICATORS



Data Quality:

The number of items whose Delivery Address postcode and / or Delivery Point Suffix information doest not meet PAF standards.

Missorts:

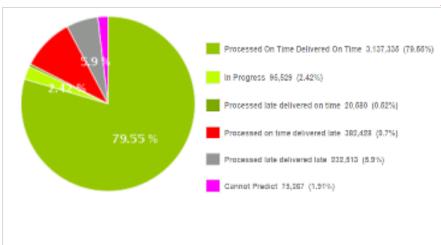
The number of items first seen at the incorrect Mail Centre

Class / Format:

The class indicator and/or the item dimensions do not correlate to the fields in the eManifest

Volume discrepancies:

More items have been seen than were listed on the eManifest(s)



PREDICTED DELIVERY

Each time a barcode is read on our automation, these delivery stats are updated for the following days report.

This means if you are viewing reports on a Monday, you will see data collated from Saturday 6am until Monday 6am.

If you are viewing reports on a Tuesday, you will see data collated from 6am Monday until 6am Tuesday.

The items will either be: due for delivery as expected; have been seen later than expected but still delivered on time; been seen later than expected and not managed to be delivered to time or have been seen but have not had a record of their final machine sort.

2. eManifest Details Tab

The table provided in the report shows information for active mailings, details are listed by Handover Date and eManifest ID. Each posting is shown as having Red, Amber or Green status.

eMANIFEST DETAILS



The tab for the eManifest includes:

- Handover Date
- Date Submitted
- RAG status
- Emanifest ID
- Supply Chain ID
- Supply Chain name
- Day no (day x of 5 calculated from the eManifest handover date)
- Machineability (this is the total number of Mailmark items with a missing or partial/incorrect/default Postcode/DPS or our machines determine a different Postcode/DP for the address)
- Volume Declared
- Volume Not Seen
- Volume not seen not expected to be seen

3. Potential UnManifested Summary Tab

This report is key to supporting the correct upload of data files. If this used while the posting is live there is opportunity for the unManifested items to be uploaded. Providing the data file and items are both within the 5 day window of the handover date, data reconciliation will occur.

POTENTIAL UNMANIFESTED SUMMARY DETAILS



Supply Chain ID	Supply Chain Name	Date Seen	Mall Producer	BIII Payer	Unmanifested Letter	Unmanifested Large Letter	Total Ummanifested Volume
100	Customer A RoyalMail	18/01/2021	Mating House A	Customer A	10,883	U	16,969
161144	Customer B RoyalMail	19/01/2021	Mailing House B	Customic B	12 661	n	12,661
1005***	Customer C RoyalMail	18/01/2021	Maning House Z	Royal Mail	10.005	298	11,293
1004***	Royal Mail	15/01/2021	Meiling House A	Royal Mari	5,439	9	5,140

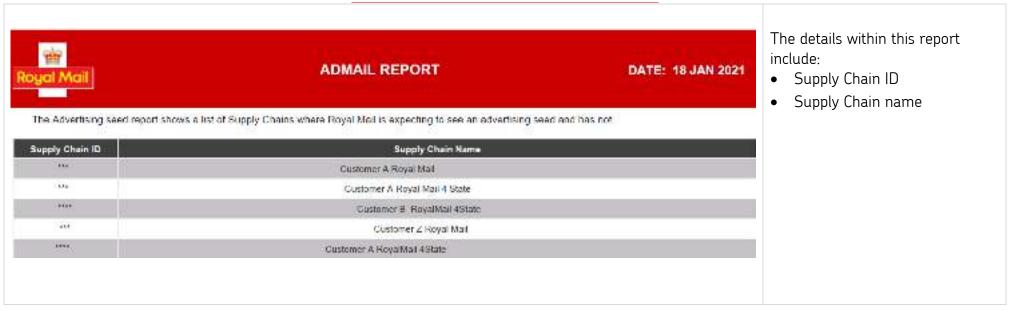
The table for the UnManifested Summary report includes:

- Supply Chain ID
- Supply Chain name
- Date Seen
- Mail Producer
- Bill Payer
- Unmanifested Letter
- Unmanifested Large Letter
- Total Unmanifested volume

4. Ad Mail Summary Report

This report shows the details of those Supply Chain's whom have opted for Advertising Mail and Royal Mail is expecting to see an Advertising seed item .

ADMAIL SUMMARY REPORT DETAILS



6. Weekly - Historic Summary Report

Report breakdown for the Mailmark Historic Summary Report

There will be two sections of reporting providing 9 days of historic data

1. eManifest Summary

The recipient will receive a static report with a pie chart which provides a visual summary of their mailings.

- The pie chart details a high level overview of whether the mailings for the date range had issues or not.
 - Green indicates mailings are successful with no issues.
 - o Amber indicates that there are issues which should be looked at.
 - o Red indicates significant issues.

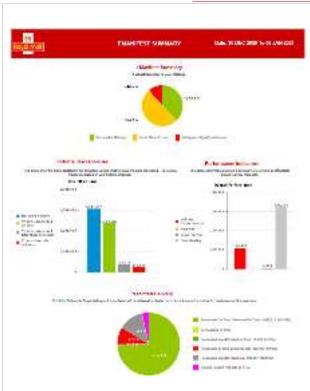
2. eManifest Details

All users will be presented with a static report with a pie chart which provides a visual summary of the participant mailings which details the successful mailings/Mailings with issues/Mailings with significant issues.

The user will be further able to view Predicted delivery, Volume & Performance metrics for the active eManifests for a customer.

1. eManifest Summary Tab

eMANIFEST SUMMARY TAB - full view



This report provides information on the overall combined and summarised performance of your mailings for the period of 9 days as indicated on the eManifest header.

Summary of all eManifests

The Red, Amber, Green split, gives visibility, as a %, of the overall historic performance of your combined Supply Chains and eManifests.

Volume indicators

The vertical graphic show the overall volume of mail declared, seen and processed for the combined Supply Chains during the date range.

Performance indicators

The vertical graphic shows the number of items by category which had issues either with the data, format, product chosen or item ID's uploaded.

Predicted Delivery indicators

The last pie chart shows you, for the items seen, what the expected delivery pattern was. This includes items being delivered on time, items seen but for which there was no final track detail and those items seen, and processed, late.



SUMMARY

Green The % of your mailings which had no processing or performance issues.

Amber The % of your mailings which may have had some issues but not to the extent that adjustments are possible.

Red The % of your mailings which require some attention as there were processing or performance issues. Adjustment charges are likely.

A visual Summary of your Mailings 11.56 % 37.72 % Successful Mailings Some Minor Errors Multiple or Significant Issues

VOLUME INDICATORS



What was declared on the eManifests.

Volume barcode not seen:

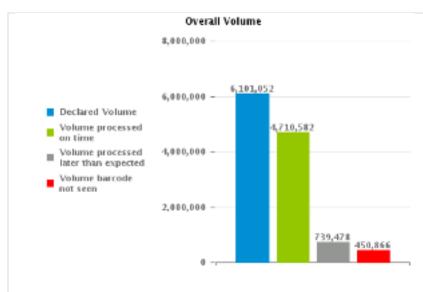
This includes the number of items we did not see/barcodes we did not read on our automation. This volume is the total volume including those items which were due to be processed at a Mailmark Centre with no automation.

Volume processed later than expected:

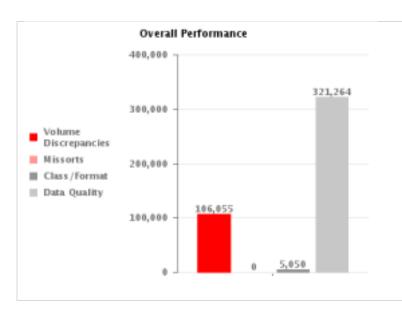
The mail which was handed over to time but was not processed as expected. *This could be due to, for example: a late handover, incorrect handover date or operational issues.*

Volume processed on time:

Items processed as expected for the service used.



PERFORMANCE INDICATORS



Data Quality:

The number of items whose Delivery Address postcode and / or Delivery Point Suffix information did not meet PAF standards.

Met standards:

There were no issues with the mailing.

Missorts:

The number of items first seen at an incorrect Mail Centre.

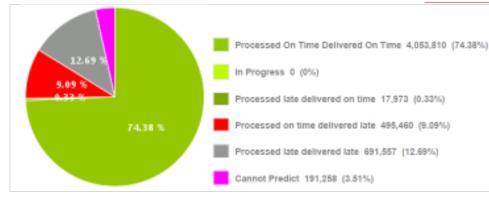
Volume discrepancies:

More items were seen than were listed on the eManifest(s).

Class / Format:

The class indicator and/or the item dimensions which did not correlate to the fields in the eManifest.

PREDICTED DELIVERY



The data shows the final performance metrics for the mail seen.

The items were either: due for delivery as expected; were seen later than expected but still delivered on time; seen later than expected and not managed to be delivered to time or were seen but there is no record of their final machine sort.

2. eManifest Details Tab

The table provided in the report shows information for historic mailings.

Details are listed by Handover Date and eManifest ID.

Each posting is shown as having Red, Amber or Green status as defined by the performance when the eManifest closed.

eMANIFEST DETAILS



The tab for the eManifest includes:

- Handover Date
- Date Submitted
- RAG status
- Fmanifest ID
- Supply Chain ID
- Supply Chain Name
- Day no (day x of 5 calculated from the eManifest handover date)
- Machineability (this is the total number of Mailmark items with a missing or partial/incorrect/default Postcode/DPS or our machines determine a different Postcode/DP for the address)
- Volume Declared
- Volume Not Seen
- Volume not seen not expected to be seen
- Missorts

3. Potential UnManifested Summary Tab

This report is will show, by Supply Chain ID, the number of items which have been unManifested.

UNMANIFESTED SUMMARY DETAILS



The table for the UnManifested Summary report includes:

- Supply Chain ID
- Supply Chain name
- Date Seen
- Mail Producer
- Bill Payer
- Unmanifested Letter (volume)
- Unmanifested Large Letter (volume
- Total Unmanifested volume

7. Report amalgamation for Participant IDs

Reports are provided at single Participant ID level.

If you have multiple Participant ID's there are two scenarios which your report viewing would fall under:

- 1. You have a common Participant ID used throughout all your Supply Chains.

 For example, you could save time by simply accessing your reports through the common Participant ID;
 - you are a client and have multiple magazine titles which have been set up as individual Participants but all your titles are mailed on one account or,
 - you have multiple departments which are linked through a few Participant IDs
 - you are a mailing house or Network Access contract holder and use the same Participant ID for all your clients
- 2. You don't have any common Participant ID's.
 You will receive individual reports for each Participant you have created. This will enable you to continue to differentiate the performance of each unique ID you have set up.

8. Support

Your contacts remain as current for any queries around your reporting or mailing performance.

Retail customers please contact your dedicated Account Manager or team.

Mailing Houses and Mail Producers please contact your personal Mailing House team.

Network Access end clients, please contact your Network Access provider.

Network Access Contract holders please contact your Account Director.



9. Frequently Asked Questions

eManifest Summary Reports (Active and Historic)

- Q What does the date on the header of the Summary report signify?
- a The date on the header is the date the report has been generated for.
- Q Previously, we could see the difference in the performance of suppliers through the combined Supply Chain ID tab. This is no longer possible so how do I know who is performing as required and who isn't?
- a The PDF reports provide summary information.To get a more in-depth data file you will need to sign up for Mailmark Direct Data.
- Q It is assumed that the 'raw data' will be for today and not yesterday.
 If that is accurate will the raw data be available at the same time as the report.
- a The Data in the reports is based on items machine processed from the previous day up to 6:00 in the morning of the current day.
- Q Previously the 'legacy report' was available at 10:00 which I would assume would present the same data. Why is there now a delay in receiving my report.
- a Royal Mail is collating the report data throughout the morning and then creating the PDF reports for your Participant ID. This means you can now simply and quickly download the compiled data.
- Q Does the 'Visual Summary of Mailings' cover that particular day or a range of dates?
- The active PDF report covers the 5-day active window within which eManifests are updated and is a summary of <u>all</u> eManifests.
 - The performance is calculated from the handover date.
- Q Why do the overall 'Performance Indicators' differ from the 'eManifest Details'?
- a Performance indicators show the number of errors per category. It is possible for items to fail more than one indicator and thus an item will be counted more than once.
- Q Is the 'Predicted Delivery' for today or yesterday?
- a The Predicted delivery is a summary of the last 5 days of all active eManifests showing if the items were processed on time or not. This is updated daily for the previous day's performance and includes details up to 6am on the day of the report upload.
- Q What does 'Not seen, not expected to be seen' mean?
- a Not seen, not expected to be seen = we did not see (machine sort) the items but we weren't expecting to machine sort them. This would be because there is no automation at the Mail Centre the items were due. Items will still be delivered but there will be no reporting information.
 - Not seen = the items were expected to be seen and were due to be machine sorted (because they were due for a Mail Centre where there is automation). However, they have not yet been machine sorted.

eManifest Details (Active and Historic)

- Q Why only certain performance and volume discrepancy KPI's are included on the emanifest details tab.
- a the major ones are included on the emanifest details tab of the PDF report for summarised version. To access a more indepth data file you will need to sign up for Mailmark Direct Data.
- Q What is machinability?
- a Mailmark items have a missing or partial/incorrect/default Postcode/DP or our machines determine a different Postcode/DP for the address. These items are classed and reported as machinability non complaint.



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Issue: 22/11/2021 Effective: 10/12/2020

General

- Q When will the historic report be available?
- a The historic report will be available every Friday.
- Q What is the date format on all the report page tables?
- a The date format is DD/MM/YYYY
- Q What all days the active PDF report will be available?
- a This active PDF report will be available Monday to Saturday.
- **Q** Why does my posting show as 0% seen?
- a There are multiple possible reasons: The eManifest was not uploaded; the eManifest was not uploaded during the 5-day window the items were first seen; the unique item numbers in the barcode did not match those in the eManifest, the barcode was poor quality, or the items were manually processed.



10. Change control log

Summary of changes V1.0 to V1.1 19 February 2021

- 1. Clarity around the difference between PDF reports and Mailmark Direct Data reporting
- 2. Removal of statement that Legacy reports will be available until 31st January 2021
- 3. Requirement for Royal Mail Account Manager information to be provided
- 4. Updated visuals: colours, legends and orientation
- 5. Inclusion of % values to the legends on the Predicted Delivery pie chart
- 6. The Campaign and Job name columns have been removed from both Active and Historic reports
- 7. Supply Chain ID has been added to both Active and Historic reports
- 8. Unmanifested details have been added to the Historic PDF report
- 9. Machineability column has been added to the eManifest details for both Active and Historic reports
- 10. Inclusion of a FAQ section

Royal Mail Mailmark®

Issue: 28/10/2021 Effective: 10/12/2020