Service | Innovation | Value

# 2017-2018 Government of Canada

# Print to Mail (PTM) Project

# Request for Proposal

# Production Insertion Equipment

# Form 2
# Substantiation of Technical Compliance Form

# Mandatory Criteria - Technical Requirements

## PART 2 GENERAL REQUIREMENTS

<table>
<tr><th rowspan="2">Ref #</th><th rowspan="2">Requirement Description</th><th colspan="2">Compliant</th><th rowspan="2">Bidder Document Reference (location/Page) Or Response</th></tr>
<tr><th>YES</th><th>NO</th></tr>
<tr><td>2.1.1.</td><td>The inserters provided to Canada must be capable of meeting the minimum daily total throughput capacity level for mail pieces per site listed below.<br><br><table><tr><th>SITE</th><th>MINIMUM MAIL PIECES PER DAY AT PEAK[1]</th></tr><tr><td>Winnipeg</td><td>288,000</td></tr><tr><td>Summerside</td><td>288,000</td></tr></table><br>Table 1 - Minimum Daily Production Requirements</td><td></td><td></td><td></td></tr>
<tr><td>2.1.4</td><td>The inserters must be identical for the two CRA PTM sites.</td><td></td><td></td><td></td></tr>
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## PART 3 TECHNICAL REQUIREMENTS

### 3.1 Inserter Hardware Capacity

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserters must have a published hourly throughput rate of greater than 12,000 letter mail pieces per hour and a published monthly duty cycle of over 4 million mail pieces. | | | |
| 2. | The Inserters must not exceed 15% in lost productivity due to misfeeds, jams and other machine related functions. | | | |



[1] The 288,000 daily minimum is based on 3 machines producing 32,000 each over 3 shifts at each sites.

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### 3.1.1 Base Inserter Configuration

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserters must support envelopes for the sizes provided below:<br>i. Maximum size 245 mm long and 156 mm high with a maximum thickness of 5 mm.<br>*ii.* Minimum size 140 mm long and 90 mm high. | | | |
| 2. | The Inserters must include six (6) high capacity insert stations capable of handling insert materials varying in size, supporting as a minimum the current PTM operational standards which are:<br><br>Width: Min – 139.7mm Max – 76.2mm<br>Height: Min – 241.3mm Max – 152.4mm<br>Thickness: Min –.76mm Max – 3 mm | | | |
| 3. | The inserters must be able to twin (pair) insert stations to permit automated failover and continuous operation without operator intervention when one feeder empties. | | | |
| 4. | a) The Inserters must include an integrated high capacity envelope feeder capable of handling a minimum of 1000 envelopes.<br>b) The envelope feeder must be located on the front of the Inserter base with easy access for the operator.<br>c) The feeder must be operator adjustable to handle the CRA minimum and maximum sized envelopes as described in 3.1.1 item 1. | | | |
| 5. | a) The Inserters must include a minimum of two divert stations with conveyer for rejected or selectively diverted mail pieces.<br>b) The Inserters must provide a method (button or switch) for the operator to advance the conveyer to access diverted materials that are at the beginning of the conveyer. | | | |
| 6. | The Inserters must support selective divert of mail pieces using application barcodes. | | | |
| 7. | The Inserters must enable the operator to selectively seal or not seal diverted materials. This function must be selectable at the job level, and using application barcodes. | | | |
| 8. | The Inserters' envelope sealer must include fresh water and overflow containers of sufficient capacity to support as a minimum, one production shift, producing an estimated 80,000 mail pieces | | | |

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| 9. | The Inserters' envelope sealer reservoir and overflow container of each Inserter must be accessible by the operators without the use of tools for refilling or emptying. | | | |
| 10. | The Inserters must detect, prior to insertion into the envelope, when a document's page or pages have not been pulled. | | | |
| 11. | The Inserters must detect when selected insert material is not delivered to the inserter track or belt. | | | |
| 12. | The Inserters must stop when an error is detected and a message is issued on the inserter display. | | | |
| 13. | a) The Inserters must ensure that all pages for a specific client document and only pages for that client have been properly inserted into a mail piece.<br>b) Inserter must stop when each error is detected and a message is to be issued on the inserter display | | | |
| 14. | The Inserters must have scanning capability and supporting scanning software at the end of the insertion process to:<br>a) Read a numeric sequence number or 2D barcode in the address area of the mail piece.<br>b) Perform simple sequence number verification.<br>c) Match mail piece to a preloaded mail data file if one is available. | | | |

### 3.1.2 Machine Readable Code Requirements

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserters must be configurable to scan machine readable codes on input to control mail piece processing and on output to perform quality assurance and sequence checking. | | | |
| 2. | The Inserters must support as OMR and 2D data matrix formats. | | | |
| 3. | The Inserters must include an operator interface that enables:<br>a) set-up of a scan area on input document pages;<br>b) identification of the machine readable code to be read;<br>c) details of the information to be read from the pages of the job; and<br>d) identification and saving of this job setup for | | | |

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| | future recall and reuse. | | | |
| 4. | The Inserters must support machine readable code changes, either in location or format, without the requirement for mechanical changes to the equipment such as relocation of a sensor / camera, or installation of new software or fonts. | | | |
| 5. | The Inserters must provide the integrated hardware and software components, including hand held scanners, required to capture reprint information and balance production jobs either at an Inserter system console or at a standalone workstation. | | | |

### 3.1.3 Input Handling

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserters' sheet feeder, accumulator and folder configuration must be capable of processing up to three pages per mail piece, C of Z folded into a standard letter mail envelope without reduction in the published mail piece throughput as stated in Section 3.1 item 1. | | | |
| 2. | The Inserters' input configuration must support subsetting which allows document pages to be separated and folded into segments prior to insertion into the same mail piece.<br><br>This feature must be controlled by scanning of machine codes on the document set pages. | | | |
| 3. | The Input cut sheet feeders must have a minimum capacity of 2,000 sheets of 20 lb. stock. | | | |
| 4. | a) The Inserters must be able to detect and alert if more than one sheet is pulled on input, to ensure that only individual sheets are processed.<br><br>b) Inserter must stop when an error is detected, and a message is to be issued on the inserter display. | | | |
| 5. | The Inserters' folders must be capable of:<br>a) Half fold of up to ten (10) sheets of 24 lb. stock.<br>b) Z fold and C folds with up to seven (7) sheets of 24 lb. stock. | | | |

### 3.1.4 Output Processing

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserters must include an output conveyer capable of shingling of a minimum of 500 envelopes to facilitate mail preparation for shipment. | | | |
| 2. | a) The Inserters must have the capability to mark the top or bottom edge of an envelope using red ink.<br><br>b) This function must be selectable by barcode. | | | |
| 3. | The Inserters must provide envelope offsetting on output conveyer triggered via barcode to identify control breaks. | | | |

### 3.1.5 Operational Requirements

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The Inserter configuration must:<br><br>a) Be the same at the two print and mail production sites as specified, enabling production to be routed to either site for insert processing<br><br>b) Provide operator console messaging<br><br>c) Have an accessible meter counter (total number of clicks over the life of the Inserter)<br><br>d) Have an accessible job counter (number of clicks per job) | | | |
| 2. | The Inserters must allow the operator to resume production of an insert job, at or before the point where an error occurred, such as a mail piece jumping the track. | | | |
| 3. | The Inserters must be able to detect, and record operator intervention and the action taken by the operator. | | | |

### 3.1.6 Operator Interface

| Ref # | Requirement Description | Compliant YES | Compliant NO | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| 1. | The Inserters' operator interface must include:<br>a) Monitor;<br>b) Adjustable keyboard and mouse support or touch screen; and<br>c) An integrated Hand-held Scanning device along with supporting software that can be configured to capture:<br>i. operator identification bar code for secure sign in;<br>ii. document bar codes or sequence numbers from job tickets for job setup and tracking. | | | |
| 2. | The Inserters' operator interface must include programmable job setup. | | | |
| 3. | a) The Inserters' operator interface must provide access controls including operator identification, password protection and user profiles to prevent unauthorized access to equipment, client information, and changes to programs or job setup.<br>b) This feature must also provide for configurable and enforceable timeouts after periods of inactivity. | | | |
| 4. | The Inserters' operator interface must enable definition of equipment setup requirements by unique job identifier. This must include:<br>a) bar code reading requirements;<br>b) number of inserts;<br>c) seal or no seal on diverts. | | | |
| 5. | The Inserters must accumulate and produce reports at a job level which must include:<br>a) document and pages read and processed;<br>b) number of inserts used by station;<br>c) mail piece report providing number of pieces by weight for Canada Post Statement of Mailing;<br>d) average throughput per job;<br>e) Reports must be available on screen and be printable in hard copy format. | | | |
| 6. | a) The Inserters must accumulate and report on:<br>i. Jobs; | | | |

| | | | | |
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| | ii. Equipment;<br>iii. operator productivity.<br><br>b) Reports must be available on screen and in hard copy format and include the following data elements:<br><br>i. Jobs: As stated in 3.1.6 item 5;<br>ii. Equipment: Run time, Down time, Operator Intervention, Equipment Error Codes;<br>iii. Operator Productivity: Number of jobs per operator, volume produced. | | | |
| 7. | Reports generated in 3.1.6 Item 5 and 3.1.6 Item 6, must be available for a minimum of one year. | | | |

### 3.2 Physical Space Available

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | The inserters must meet the stated capacity requirements (refer to Section 2.1.1 herein) within the space available in each of the inserter rooms, as per the dimensions stated in Appendix A and B herein. | | | |

### 3.3 Security

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | To prevent the possibility of unauthorized modifications of data, alerts must be pushed from the inserter to the target alert address; no incoming messages will be allowed. | | | |
| 2. | Access to the Inserter software components must be controlled so that:<br>a) Only authorized users will have administration access;<br><br>b) Operator access will be limited to operators or personnel needing to assist in trouble-shooting operator-specific problems. | | | |
| 3. | The inserters must disable any remote diagnostic capability. | | | |

### 3.4 Mechanical, Electrical and Environmental

| Ref # | Requirement Description | Compliant | | Bidder Document Reference (location/Page) Or Response |
|---|---|---|---|---|
| | | YES | NO | |
| 1. | Each Inserter unit must be configured with a dedicated integrated UPS system having sufficient power to support the controlled shut down of the Inserter and attached computers, in the event of a local power outage. | | | |
| 2. | a) The Inserters must not have any sharp or exposed sheet metal edges at the end of the input or output conveyers that could cause injury.<br>b) If there is any possibility of operator contact with sharp edges, protective edge covering must be applied to exposed areas. | | | |
| 3. | The Inserters must not have exposed moving parts other than those required to add or remove materials. | | | |
| 4. | The Inserters hardware and respective consumables must not contain any parts, devices or ingredients that, when operated or applied in accordance with OEM instructions, would cause injury or harm to operations personnel or building occupants. | | | |
| 5. | The Contractor must provide comfort floor mats for each Inserter operator work area. These comfort mats must:<br>a) Be made of industrial quality material;<br>b) Be a minimum of one inch (1") in thickness;<br>c) Have a sponge like and durable base;<br>d) Be water repellant texture so spills can easily be wiped off;<br>e) Be tailored to fit the Operator work area where each inserter is installed. | | | |