

TT #18: Business Customer Gateway - Meeting Minutes

Friday, June 14, 2013
12:00am-12:00pm EST

Agenda Items:

1. Review Minutes
2. Group Input
3. Recommendations
4. Next Meeting

Review Minutes

Issues/Concerns

1. Question: Is it possible to generate a query for our locations for each user in regards to what services they have access/permissions to?

Answer: The export functionality via Manage Users page will allow users to query their locations based on users and their services. It is scheduled for the July Release. Users will be able to download data via CSV and Excel with the following information:

- a. Email
- b. First/last name
- c. Phone number
- d. User name for each person
- e. Service
- f. Business location
- g. Access/permission level

Updated Answer: Originally this was scheduled for the July Release, however further investigation revealed it is more complex than we first thought. We are continuing to look into the options and will keep you informed.

2. Question: Will the export functionality work only for BSAs?

Answer: Yes, the export functionality is just for BSAs.

3. Question: Will the export functionality show who the BSA is?

Answer: USPS will look into this.

Updated Answer: The BSA will be able to export users only for the services of which they are BSA, so there would not need to be an indication of who the BSA is since it is the user themselves.

4. Question: How would we know who has the BSA role?

Answer: The BSA name is viewable to the user once they are approved for a service.

Updated Answer: We are looking at ways to provide greater transparency on who the BSA is for each service. Currently, the BSA name is viewable to the user once they are approved for a service. We would like to expand this to be viewable for when a user has a pending BSA request and for BSAs within a CRID to have visibility of each other. We will continue discussions on this in the coming weeks to get agreement by the task team on what you would like to see.

5. Question: Will the export functionality be available for assigned BSAs as well as the Primary BSA?

Answer: For now it will be available for the Primary BSA. It will be available for other BSAs in a later release.

6. Question: Who will be able to view the Manage Users page? Can delegates view this page?

Answer: The Manage Users page is for the Primary BSA. USPS will look into incorporating new functionality for BSA delegates.

7. Question: Can you explain the BSA logic?

Answer:

- a. For a new user coming through the BCG at a new location, they will automatically be assigned Core services and will become the BSA of those Core services.
- b. If a new user comes into an existing location/CRID and there are services for which the BSA role is not yet filled, they will become the BSA for those services.
 - i. For example, you may be the BSA of 3 services at an existing location, if a new person comes in at the location they will get the BSA role for the service they requested if there is no BSA already assigned to that service.

8. Question: What happens where one facility has BSA for Manage Mailing Activity (MMA) and BSA for Mailer ID (MID) and no other services are being used? Would for example, 6 users get the BSA role for those other services?

Answer: The next new user who registers at that location would get the BSA role for the remaining services. USPS will check the logic on this.

9. Question: As the first user requesting access to a service at a new location, and select 'yes' via the pop-up modal to become the BSA, why does my service go into 'Pending Status'?

Answer: There is a flaw in the logic. Some users are receiving the pop-up modal to become the BSA when requesting access to a service at a multiuser location. This will be corrected in the June 23 release.

10. Question: Why are Existing users being prompted to sign up for more services, some for which they already had?

Answer: In the current logic, when a person comes in the BCG for the first time, the system is checking to see if they have requested services. If they have not, they have to go through the registration process as if they are a new user. When the BCG went live in 2009, users who had access to FAST or *PostalOne!* were assigned services without having to request them.

There will be new logic implemented on the June 23rd release. Pre-existing users will be directed to the sign-in homepage where the system will check for services and requests.

11. Question: Why would I get a request to approve a user as a BSA for those contingent services?

Answer: As the BSA of Manage Mailing Activity (MMA) and or Mailer ID (MID) service, you have to grant the permission. For a person to become a BSA for Online Enrollment and Incentives Program, the BSA of MMA would have to approve the request because they control the financials under MMA.

12. Question: Is FAST part of the contingent group? My FAST BSA is getting the same request for users that are requesting access to FAST?

Answer: No, FAST is part of the Core services. The user is receiving these requests because they are the user with the BSA role for FAST.

13. Question: How will USPS Auto Approve in the future when a customer comes in and request something for which there is not a BSA?

Answer: If you are the BSA over MMA, MID, and FAST and a second new user comes in and goes through the registration process, the user will be assigned the BSA role for those services that do not have a BSA at that location for that service.

Question: And I won't receive a request at that point?

Answer: The only time you will see a request is during a contingency situation i.e. Online Enrollment is if you are already the BSA of MMA. You will have to approve the others to be the BSA.

14. Question: The only way to prevent me from getting request from users to become a BSA is to go in before they do and request the service for them to become the BSA?

Answer: Yes – contingency logic is the same from old BCG application. The contingency approval is only for the BSA. They should only be seen one time for one person. Once the Primary BSA approves the contingency BSA, all requests will go to that BSA.

15. Question: Can we have a document to explain BSA relationships and Contingent Services?

Answer: Yes, USPS will provide this information.

16. Question: Our MSP flags are set to null. Does the BSA set this or the Help Desk?

Answer: Currently the Help Desk sets the MSP flag. The July release will have new functionality where the BSA of Manage Mailing Activity will have the ability to change that flag from 'no' to 'yes'. Once the box is marked 'yes' the user will need to call the Help Desk to change it back to 'no'.

Today not everyone can view the MSP flag. If you are an existing user with multiple users at that location you will come directly into the system and will not be prompted with the MSP flag. The July release will have new functionality to allow everyone to be prompted with the MSP flag.

If the MSP box is checked you can get into the customer validation tool to look up MIDS and CRIDS for your clients and submit bulk MID/CRID requests. This will eliminate the manual process today.

17. Question: What services are the contingent services?

Answer: a. Online Enrollment and Incentives are contingent on MMA
b. Online Enrollment contingent on Mailer ID

18. Can we get a list of what is going in the June 23 patch?

Answer: USPS will provide a list on Tuesday, June 17 of what will be included in the patch release.

New Recommendations

1. Manage profile screen add a location recommendation from the *PostalOne!* Report subgroup
 - a. In the add a business location block maybe it should be two functions
 - i. create a business location and;
 - ii. add a location to your profile
2. Would like to have the capability to view the name of the BSA.
3. Large mailers would like to define what services their users should have access to or BSA role rather than having the users automatically assigned Core services.

Complete Recommendations List

1. Mailing/Shipping Service Pages
 - o Not fond of this layout – Too much scrolling
 - o USPS looking at making services pages collapsible. It will push the page up. Descriptions will not automatically be shown.
2. Favorites text is too small. They should be made larger or stand out more
3. Change look of service pages. The list is too long and too much scrolling. Look into collapsing the service descriptions.
 - o Possibly have a variety of views and let the user choose how they want to view it i.e. MicroStrategy
4. Change “Welcome” to “Gateway” on tabs - users are used to that terminology
5. Text in Black Tool Bar can be more prominent and the Header links are too small, maybe make the gray even a bit brighter than it is but like the gray bar
6. Add “Gateway” in the header instead of “Home”
 - o USPS can try and add to a BNS/SRS for an upcoming PO! Release

7. Eliminate flashing image if it occurs on the new homepage as it does on the existing homepage.
8. Choose a location before opening the Dashboard to speed up the response.
9. Allow BSA the ability to remove a user from the list all together via Manage Users.
10. Would like to have an export capability from the Manager Users page that should include an email, address, phone, etc.
11. Add contact information from Manage Users page and Inbox.
12. Add 'Click on service name for additional information' in mailing, shipping, and business modals on public homepage.
13. Put some language on the screen regarding contingent service i.e. you need access to MMA and MID for Online Enrollment.
14. Have BSA preferences and default to display BSA information.
15. Capability to edit password once logged into the BCG.
16. Provide some type of automatic update and notification to the user when the access level has been changed in the Manage Users page.
17. Cookies and cache is a big and consistent issue, logout issues, going back to links and already signed in, logging in as another user after being logged in as self still see self's info when logged in as user 2, need to clean cookies/cache and then it usually works but not always....

Next Meeting

- June 28 at 12pm EST