

TT #18: Business Customer Gateway - Meeting Minutes

Friday, August 16, 2013
12:00pm-1:00pm EST

Agenda Items:

1. Review Minutes – July 19
2. New enhancements/functionality for September release
3. Export functionality
4. Additional Group Comments/Questions
5. New Recommendations

Review Minutes – July 19

New enhancements/functionality for September release

- Discussed key BCG 6.0 Release Notes for August 22 Deployment
 1. Enhancements to Manage Users Functionality for delegates to view the page
 - a) Users will see a 'Success' or 'Try Again Later' Indicator
 2. Aggregate view of services on the Mailing, Shipping, and Other Services pages
 3. A new processing indicator to inform user action has occurred
 4. Profile page MSP line removed and added to Manage Locations tab
 - a) Only BSA of MMA can edit MSP status
 - b) MSP status is set initially on the creation of the CRID during the enrollment process.
 - i. If user becomes the BSA of MMA then they will be prompted with the question 'Is this location a MSP?'
 - ii. For existing users who did not go through the enrollment process they will have to go through and edit MSP via Manage Locations page.
- USPS is looking into a self-service way for the BSA to make an indication to the system directly to remove them as a user.
- Items in the queue for development
 1. Multi-user CRID enrollment flow
 - a) USPS will perform a check that there are other users assigned to a CRID allowing the user to select Core services or individual service selection via enrollment process.
 - b) User will be able to select 'Yes' or 'No' to becoming the BSA.
 2. BSA Transparency

- a) The BSA name will be added to the optional field on the Manage Profile page per USPS privacy.
 - i. TT18 would like the system to display the name as a default.
- 3. Mailing, Shipping, and Other Services pages – USPS is looking into minimize the scrolling on these pages.
 - a) Make services collapsible to show description, reducing the scrolling on the Services pages.
- 4. General performance testing
- 5. USPS is looking into displaying only Manage Mailing Activity in the description section on the Mailing and Shipping Service pages and provide a list of the below sub-services the user gets access to rather than listing out all of the sub-services which is the current functionality. This will reduce the length of the service pages.
 - a) Mailing Reports
 - b) Dashboard
 - c) Balance & Fees
 - d) Postal Wizard
 - e) Manage Permits
 - f) Electronic Data Exchange

Export Functionality

- USPS is still looking into the Export functionality where a BSA or BSA delegate can export a list of their users for whatever location they are the BSA for from the Manage Users page. We not have a date exactly but maybe end of calendar year.

Additional Comments/Questions

1. Question - Can Manage locations be sorted by Business Name rather than CRID? Or could the locations be set as a default? The text should be more readable, using upper/lower case and not all CAPS or have the location name in bold.

Answer – USPS can look into this.

2. Question – How can we remove a person from the BSA role?

Answer – You will need to contact the Help Desk. The Help Desk will need an email from the BSA requesting to be removed from a service. The Support page gives instructions on how to remove a BSA person.

3. Question - When will it be available to remove MSP? For now we still have to go through the Help Desk.

Answer – We are looking at what impact it will have across applications to allow people to change their MSP indicator. For instance we are trying to coordinate with Incentives because they have their own MSP indicator. We want to make it so that a user does not have separate indicator for everything they do. USPS will look into changing this in the future.

4. Question – Can we have access to try some of the new features before they will be released into production?

Answer – Yes, new functionality will be in CAT and we can look into making the CAT cycle longer for you test. As we are developing, we can do some demos for you while in the development phase before the functionality is deployed to CAT.

5. Question – In regards to the MID/CRID lookup, can we have access to view whether or not MID or the applicable CRID would be designated as a MSP and whether anyone else will see value in this or is this proprietary information? Particularly the MID.

If I go into Mailing reports today I could have generated an error that indicates that in the last past 90 days the mail owner MID used in the eDoc was designated as a MSP.

Answer – We use the MSP indicator which is off the CRID in BCG is not the error Full-Service is using. FS is pulling that from the eDoc information. From the eDoc, it is how you submit your file. The error could mean the MID was used in eDoc by in the Mail preparer field by someone.

Question - Can't a person be mail owner/mail preparer?

Answer – Yes, there is an indicator in *PostalOne!* for this. (Susan Redman will look into why this error is occurring and check to see if the system is using the MSP indicator in the eDoc. Linda Gustason will forward Susan the information).

6. Comment - TT18 accomplished their goal which is to provide feedback on the new BCG redesign and future enhancements. TT18 will sunset but the group would like to remain as willing team members informally (e.g. BCG User Group) to provide feedback on new enhancements and functionality.

New Recommendations

1. Manage locations be sorted by Business Name rather than CRID? Or could the locations be set as a default? The text should be more readable, using upper/lower case and not all CAPS or have the location name in bold.

Open Recommendations List

1. Mailing/Shipping Service Pages
 - Not fond of this layout – Too much scrolling
 - USPS looking at making services pages collapsible. It will push the page up. Descriptions will not automatically be shown.
2. Change look of service pages. The list is too long and too much scrolling. Look into collapsing the service descriptions.

- Possibly have a variety of views and let the user choose how they want to view it i.e. MicroStrategy
- 3. Choose a location before opening the Dashboard to speed up the response.
- 4. Allow BSA the ability to remove a user from the list all together via Manage Users.
- 5. Would like to have an export capability from the Manager Users page that should include an email, address, phone, etc.
- 6. Add contact information from Manage Users page and Inbox.
- 7. Put some language on the screen regarding contingent service i.e. you need access to MMA and MID for Online Enrollment.
- 8. Have BSA preferences and default to display BSA information.
- 9. Capability to edit password once logged into the BCG.
- 10. Provide some type of automatic update and notification to the user when the access level has been changed in the Manage Users page.
- 11. Manage profile screen add a location recommendation from the *PostalOne!* Report subgroup
 - 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
- 12. Would like to have the capability to view the name of the BSA.
- 13. 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.

Closed Recommendations

1. Favorites text is too small. They should be made larger or stand out more - Completed in July Release 5.0
2. Add “Gateway” in the header instead of “Home” – Completed in June Release 4.4.
 - USPS can try and add to a BNS/SRS for an upcoming PO! Release
3. 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. Completed in July Release 5.0.
4. Add ‘Click on service name for additional information’ in mailing, shipping, and business modals on public homepage. Completed in July Release 5.0.
5. Change “Welcome” to “Gateway” on tabs - users are used to that terminology – Completed in June Release 4.4.