

**Mailer Technology Advisory Council (MTAC)
Meeting Report
01/27/2016 12:30 PM - 1:30 PM**

USER GROUP 4 (UG4) SESSION

AGENDA

- 1) IV Company User Permissions Structure
- 2) Update on IMb Tracing
 - a. System Upgrade
 - b. BPM STIDS
 - c. Reply Mail STIDS
- 3) AOB

DISCUSSION POINTS

The purpose of this meeting is to provide an ongoing forum to facilitate communications between the Postal Service and users, define and review improvements in process/production functionality and address and resolve issues.

IV Company User Permissions Structure

- Amy Cradic discussed how company permissions will be handled through IV.
- The various company permissions and admin roles in IV were defined:
 - Company Data Delegation Manager – grant other company’s access to company data
 - Company Address Book Manager – maintains company address book and distribution lists
 - Company Subscriptions Manager – manages report and query subscriptions at the company level
 - Company Report Manager – creates and manages access to reports and queries on behalf of the company
 - Company User Site Preference Manager – sets the default company homepage and customizes content and view
- UG4 members had questions regarding whether the same Business Service Administrator (BSA) rules would apply, and who controls admin roles.
- Amy – explained that the same rules will apply, and admin roles will be managed in IV. The (BSA) will have access to everything, and they can assign one or more company users.
- The business company would be defined as the business entity we would be interfacing with.
- The default permission in terms of start the clock data is the MID owner who has the right to assign and delegate. USPS is still working to ensure aggregate data is made available in IV.
- In response to Shawn’s request to have the administrative roles chart combined with the data delegation chart, it was decided to ask for examples that we can use.
- USPS will provide a date when the planned migration for Users is expected to occur.
- Amy – plans to review the migration and the timeline at an upcoming MTAC UG4 meeting.
- Judy – suggested that it would be best to find out from the group who the contact is to receive notifications. She is concerned that the right people receive it, and thinks not everyone will want it to be the BSA.
- The main changes to the Business Customer Gateway (BCG) will be that users will have to sign up for IV.
- David Gorham suggested a coordinated effort with IMb Tracing so notifications will be put onto the site, and to direct users to the BCG.
- It was agreed that instructions will go out to Industry. The process will be automated, and the plan is to put out a URL or access portal for IV. Users will be redirected to the BCG to put in their credentials and then be redirected to IV.
- Some questions were raised about the role of the BSA, and it was clarified that the intent is for the BSA to set up the owner in all the roles. At that point s/he can set up others’ permissions.

- All user roles are to be managed through IV; the goal is to be able to manage hierarchically.
- Amy – Training materials will be coming out to help users walk through IV as well as the BCG.
- Companies can create and maintain their profile and set preferences for data through Informed Visibility. The types of functions that will be made available include:
 - *Company Address Book, Company Subscriptions, Company Reports, Queries, and Alerts, Company Data Delegation, Company Site Preferences.*
- Individuals will be able to customize their experience by creating and maintain profiles and setting preferences for data, through:
 - *My Address Book, My Subscriptions, My Reports, Queries, Alerts, My Favorites and My Site Preferences.*

Update on IMb Tracing

- There was a notice from the Help Desk that IMb Tracing would be taken down for a short time.
- The Performance group wanted to set up an indexing mechanism. There was a four hour period when Scheduler did not send out any data. This was successfully executed, and was the precursor to enable BPM STIDs.
- The new Reply Mail STIDs are ready to be activated however; we are awaiting a decision from Marketing. They have been made aware of concerns regarding the election and political mailings.
- USPS is planning to migrate away from MEPT as a data source. This is one of our planned deployments from September, and will be implemented in March. Once in place, it will improve data latency issues, affecting scan records, etc.

All Other Business

- Himesh – will get a date from Kai Fisher and will publish it.
- Lisa requested an update from Cliff Rucker on the political mailing dashboard.
- Himesh – will inquire about his availability and a workable date.
- Bob Rosser – raised the point about a presentation at ID Alliance on new SCF yard arrival that covered data capture on SV scanners, and the ability to look at how and when mailers would be able to access yard arrival data. This is when a driver self-reports. The process was rolled out to the field but has not been formalized; it was part of Lisa Malone’s discussion.
- There was a question regarding Angelo’s plan to report on long haul mail. It was not clear what the issue or concern was exactly. Judy offered to find out.
- The meeting was adjourned.

Action Items

Industry Members – provide examples from others on Admin roles combined w/data delegation to Himesh.
Himesh – will inquire about Cliff Rucker’s availability to speak to UG4 about the political mailing dashboard.

Agenda Items

Amy – Plan a discussion of the IV Migration process and Timeline