

**Mailer Technology Advisory Council (MTAC)
Meeting Report
03/09/2016 12:30 PM - 1:30 PM**

USER GROUP 4 (UG4) SESSION

AGENDA

- 1) NPF
- 2) IV™ – Education & Awareness Campaign
- 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™ Education & Awareness Campaign

- Recap: The purpose of IV™ communication awareness is to inform stakeholders about the benefits of IV™, the systems/processes it will impact and what mailers need to do to get ready, and provide the associated Mail Tracking & Reporting timeline of events.
- A column for the targeted audience was added to the Communications Plan table shows that both current IMb Tracing customers and current Container and Tray Visibility customers will be the audience for all communications during initial deployment.
- Sources for Stakeholders: for IV™ Piece Visibility, communications will be sent to current IMb Tracing customers through the IMb Tracing helpdesk. For IV™ Container and Tray Visibility, communications will be sent to current PostalOne! customers through the PostalOne! helpdesk.
- There are two sets of releases for Mail Tracking & Reporting:
 - June 10 – The initial features of IMb Tracing for Container Tray and Bundle Visibility will be deployed.
 - July 25 – the Enhancements for Web-enabled Mail Tracking will be deployed. This release includes assumed handling events based on nesting information as well as enhancements to web enabled mail tracking, data provisioning and data delegation.
- As previously stated, communications will be posted on RIBBs, MTR site and discussed at MTAC.
- A technical/development guide will be provided that will aid in understanding the IV™ Data Model to inform mailers of what needs to be done on their systems to prepare for the IV™ migration. A new communication was added to week 7 of the Communication Plan, "Training Set #3 IV™ Technical Guide". The trainings will include IV™ Technical Guide, Overview of IV™ Data Model as well as IV™ Data Dictionary and IV™ Sample Data Set.
- For the pilot, a handful of customers will be asked to participate and migrated the end of May; all others will be migrated by mid-June.
- David – The above timeframe allows only 60 days for the industry to prepare to handle data, without a guide.
- For IMb Tracing, there is no impact if mailers don't make a change, however, to take advantage of new attributes, changes to the mailer's system will be necessary to receive and ingest the data.
- The technical guide will be disseminated the week of April 25th. The guide will allow users to plan whether or not they want to receive additional data, and to begin development.
- Randy – During the migration period does everyone have to migrate over? Will we still get data through the Mail Tracking & Reporting site? Will the IMb Scan delivery notification schedule set-up remain in place?
- Amy – You will be migrated over to the IV™ System within that timeframe. Data you are receiving will come from the IV™ database, not the existing one.
- Customers currently receiving their data from FTP will have the option to keep subscriptions as they are. In this case, there is no impact to mailers (there is no further action that is required). USPS performs the migration of subscriptions from one system to another. The data will be in the same format, and will be sent to the same server as today. The data will be coming from the IV™ database, and IV™ will switch off the old feed to the new system.

PRODUCT INFORMATION

- There will be one day where data will continue to be received from both systems, over a 6 hour period. This is to ensure there are no missing scans. Those participating in the pilot will receive data from both systems and confirm there are no concerns.
- As almost everyone uses FTP or FTP Out, once the migration takes place and the data is received, the data transfer services team will be engaged to set everyone up in using secure FTP. Data will go through as normal.
- FTP retires sometime in 2017, and a footnote will be added to the slide to indicate this.
- Lisa – In regards to Business Service Admin (BSA), when would it be necessary to go through the Business Customer Gateway (BCG)? Currently, Mail Tracking and Reporting (MTR) is not connected to a BSA.
- Amy – IV™ will be added to the BCG as a service. The reason to go on line is to revise your subscription yourself instead of going to the helpdesk, or to do an online query as you would today through MTR.
- The existing MTR site will be retired and will be replaced by the IV™ portal. IV™ will be added to the BCG as a new service. It will be called Informed Visibility. The first person to sign in will be prompted and asked if they want to take the role of the BSA. They will have the option to say Yes, or No, in which case someone else can take on this role, or delegate it to another individual.
- Lisa – it may be inappropriate for her to accept the role of the “IV™ BSA” due to the fact that her customers will not want to grant her access to the BCG, or really to their financials.
- Amy – anticipates having a meeting with Customer Reg this week, and plans to discuss how getting approvals for the IV™ BSA will be handled at the company level. She will report back to UG4.
- Roles & Permissions: Giving users access is done through the BCG. It is approved by the IV™ BSA or the delegate. Once the users have access in IV™, they are handled on the IV™ web site by the roles and permissions manager. The IV™ BSA by default gets all the administrative roles, they can perform roles and permissions management, set up or change the subscriptions, manage the address book, and perform data delegation. If they want to delegate admin permissions to someone else within that company, they can grant them access as well.
- Lisa – The process is becoming too complex, and the concerned is it will create confusion.
- Judy – Regarding a broad message going out, the concern is some users who are not approved to act may do so because they think they have to. The helpdesk could end up with a lot of calls from people getting locked out.
- Randy – pointed out that if a user accepted the IV™ BSA role and decided they really didn't want it, they would have to go through the helpdesk to get it reassigned.
- David – Is there a date the MTR system will actually retire?
Amy – Assuming all goes well with the pilot, we won't turn off the MTR website until everyone has migrated over - this means June 10th - July 8th. If there are no issues, there would be no need for the MTR website..
- Mailers who use IMb Tracing and who use FTP today, but don't go on line to manage their subscriptions, can contact the helpdesk, as there will be no impact to them. Their data will be sent to the existing FTP Server.
- Mailers who use FTP and go on line to manage their subscriptions will have an impact. They will have to give their users access to the new website, assign an IV™ BSA, and decide whether someone else other than the IV™ BSA should perform roles/permission, data subscription, and address book management.
- There will be no changes for mailers who use Secure FTP, (same as FTP) if they currently go through the helpdesk; messages will still flow through as normal.
- Customers, who go online to download their data but have no subscription set up, will need access to IV™, and need an IV™ BSA. They may choose a separate individual for roles/permissions management. Web users may also be specified; they are capable of logging onto the site to search for and download the data.
- Training on managing company data subscriptions will be made available during the week of May 2nd. The training will include information related to accessing the BCG, and clarify how the BSA approves these roles, how to apply for access, and what to do when you receive it.
- Lisa – BSAs today are not used to approving people outside of their organization. The BSA in her company needs to be a jack of all trades. BSAs were not previously discussed.
- Himesh – Agreed. A plan needs to be put in place for how roles are going to play out for data delegation, who has what rights, and understand any legal ramifications of providing access to proprietary data.
- Container & Tray Visibility migration impacts are based on three scenarios; those who do Mail.XML Push, those that do Mail. XML Pull, and those who perform online downloads.
- In IV™, a push/pull triggers start the clock container notifications as well as container visibility delivery

notifications and pulls (for container and tray).

- Those who have Mail.XML Push can go into PostalOne! today and revise their subscriptions. The changes can also be made through the helpdesk in IV™.
- The Postal supported “MPS scan VIS” system for bundle visibility was turned off due to sizing limitations, however, it will be supported by IV™. If there are no changes, then there is no impact or changes to companies.
- For those who perform a Mail.XML pull, technical resources will have an impact because they would need to modify the web service to use IV™’s end point instead of PostalOne!’s.
- Mailers who go on-line through the Data Distribution Dashboard to do queries and download data, will have to start doing this through the IV™ Web Portal. It will require someone in the IV™ BSA role. Web users will need to have access and understand how to do queries and downloads in IV™.
- Judy – How is the process for Mail.XML changing today, and can a MID owner on Piece get a push of container data that includes pieces that they own? How does access to the data change? Today, the ownership is defaulted to certain parties. They go through a delegate process to get data pushed.
- Dave – will it be a push like FTP?
- Angelo – The way it is done today: the By/For needs to be correct in eDoc before setting up the distribution. It is a cumbersome process.
- Himesh –The process is cumbersome because certain controls are in place. The next step is to ensure the right folks are present for a discussion, and to be sure the policy is stipulated clearly.
- Angelo raised a point about previous discussions where Amy indicated restrictions were being coded in.
- Amy – The system is being built so it’s flexible and so IV™ can support decisions, regardless of which direction we may need to go in.
- Amy will talk to Himesh or Steve Dearing about the default permissions. The policy questions will be captured next week.

National Postal Forum (NPF)

Recommended sessions for NPF were discussed and the final presentations are as follows:

- Building a Winning Multi-Channel Campaign, David Lewis
- IMb Tracing Can Tell you More than Delivery Status, Trista Niswander/Steve Smith
- Mail Tracking and Reporting: The Next Customer Expectation, Mark Rheume
- Shipping Products with USPS Visibility, Karen Key/Juliaann Hess
- Getting the Most From Online Postal Resources, Lisa Bowes
- Planning In-Home Delivery, Kurt Ruppel, Bob Rosser
- Exploring the Power of Mail Visibility, Steve Dearing
- First-Class Mailers – Visibility Tools You Need to Succeed in a Regulated Environment, Judy Kalus
- Intelligent Mail Package Barcode (IMpb) Visibility with a Purpose, Juliaann Hess

AOB

- Michelle raised a question about USPS providing a service like track and confirm for mailpieces?
- Himesh – Track and confirm is not in the present scope; it will be discussed at the next meeting.
- Future Meetings: Next Week’s MTAC UG4 – Himesh will be on travel. An email notification will be sent to the group regarding the next scheduled meeting. There will be no MTAC UG4 meeting during the week of NPF.
- The meeting was adjourned.

- **Agenda Item:** Dave Lewis’ email of 3/9/16 on Bundle Tracking and Container and HU Scans.
- **Agenda Item:** Discuss the ramifications of providing track and confirm for mail.
- **Agenda Item:** Discuss how getting approvals from the IV™ BSA will be handled at the company level.
- **Action Item:** Amy to schedule a meeting with Steve Dearing to discuss IV™ policy questions.
- **Action Item:** Judy to send Himesh Darlene’s Wolfe’s topic slide “One Size Fits All” for NPF.