



# INFORMED VISIBILITY™

Mail Track & Reporting  
Registration Process

Amy Cradic  
IV Program Manager

March 16, 2016



# Access to Informed Visibility

Company Default Permissions,  
IV Registration Process through BCG,  
and Post-Registration Logon to IV

- 1 **Required:** Establish IV Business Service Administrator (BSA) and BSA Delegates



- a. First user associated with a CRID that requests the Informed Visibility service will be asked to become the IV BSA.
- b. User can accept (in which case they become the IV BSA) or they can deny (in which case another user will have to accept this role)

## Optional: Set additional Roles & Permissions Managers

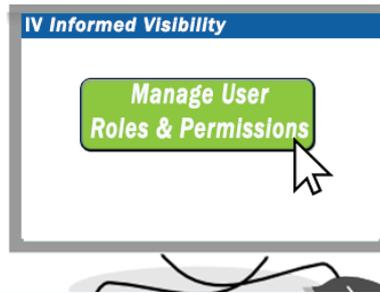
### Background:

- The IV BSA and BSA Delegates all have the Roles & Permissions Management role by default.
- The IV BSA (or another Roles & Permissions Manager) can add one or more Roles & Permissions Managers for the CRID or a MID.

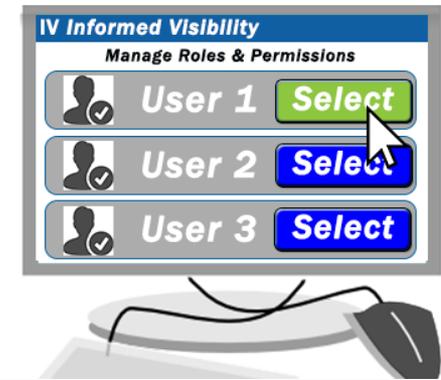
- 1 IV BSA or IV Company Roles & Permissions Manger logs into IV



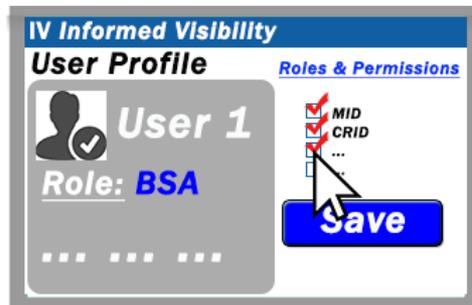
- 2 Proceeds to **Manage User Roles and Permissions** page



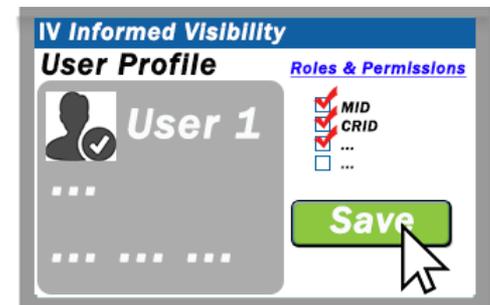
- 3 Select **User**



- 4 Add role for Roles & Permissions Manager to user



- 5 Click **Save**



## Optional: Set company default permissions profile

### Background:

- Companies are able to customize their default permissions profile by CRID.
- The predefined default settings will be to provide read-only access to all mail visibility data for the MIDs associated with the CRID that the user has been granted access for.
- The IV BSA or IV Company Roles & Permissions Manager can customize the default profile.
- They can also customize the permissions for any individual user to be different than the CRID default profile.

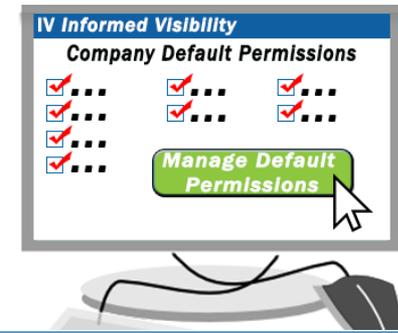
- IV BSA or IV Company Roles & Permissions Manager logs into IV



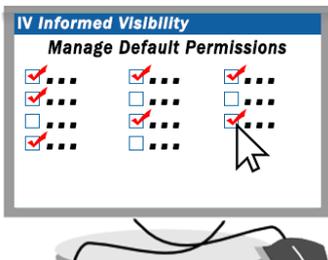
- Proceeds to **Manage Company Permissions** page



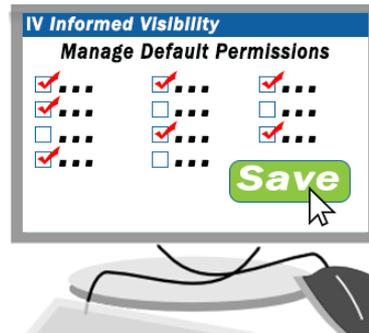
- Select **Manage Default Company Permissions**



- Modify the default company permission profile



- Click **Save**



- Now, any users approved for the IV Service by the IV BSA will be granted these default company permissions



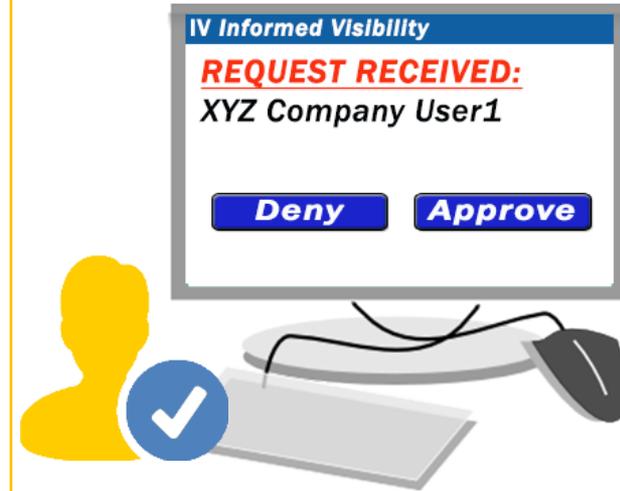
1 User logs onto Business Customer Gateway (BCG)



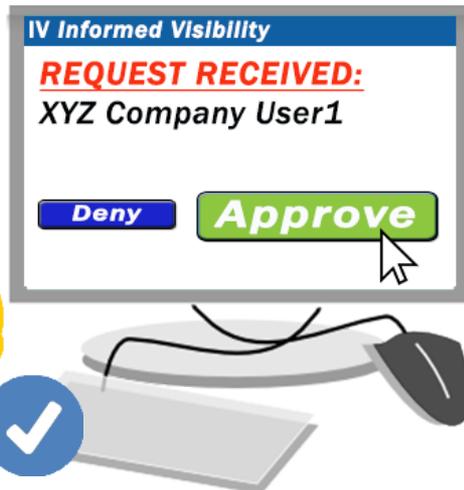
2 Select **Add Service for Informed Visibility**



3 Request goes to IV BSA for approval



4 BSA approves request



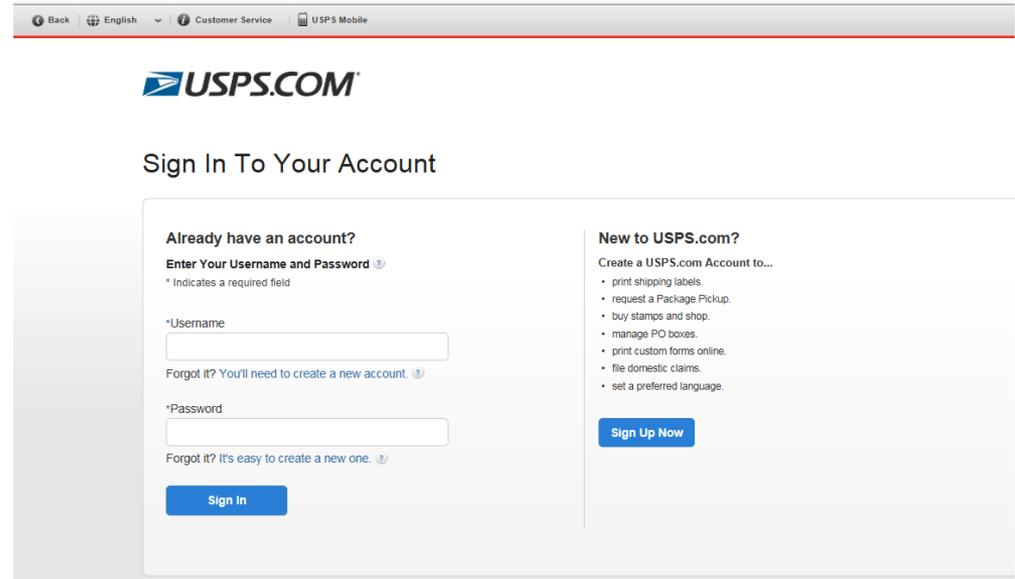
5 User profile is added to IV and permissions are established in IV based on company default profile



6 **Optional:** IV BSA or IV Company Roles & Permissions Mngr. changes user permissions in IV, if desired to be different than default company permissions profile.

Note - IV BSA or IV Company Roles & Permissions Mngr. can set default permissions for users who are granted access to the IV service. If a company elects to not deviate from the default established, then there is no work for the Roles & Permissions Mngr. The default permissions will be set up automatically.

1 User accesses IV portal from direct URL



2 IV will authenticate user through CustReg (authentication is seamless to customer)

