

**Mailer Technology Advisory Council (MTAC)
Meeting Report
05/04/2016 12:30 PM - 1:30 PM**

USER GROUP 4 (UG4) SESSION

AGENDA

- 1) IV™ Tech Guide update
- 2) BSA process update
- 3) Any other business

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™ Technical Guide

- The Technical Guide was reviewed to confirm migration impacts.
- Revised date for Technical Guide: Week of 5/16. User feedback will be incorporated before posting to RIBBS.
- Mailers will need to load the certificate to their server.
- An update to the IV™ Rollout Message #1 will be performed and it will be posted to RIBBS.
- Changes to the Training Matrix include:
 - Educational awareness activity to be updated with associated dates
 - An updated mail tracking roadmap added Roles/permissions management features
 - Two columns were merged into one: Web Enabled and Flexible Data Provisioning

BSA Process Update

- The BSA role is being set up in IV™ and will be clearly articulated as “IV™ BSA” in documentation to distinguish between BSAs for other services.
- A revised deck on data access and delegation is in the process of being finalized.
- A question was raised regarding the mail owner having the ability to delegate to a 3rd party when the MID on Piece is not owned by them. It was explained that the mail owner would have to solicit permission. This request goes to the MID-owner of MID on Piece who must consent before delegation can occur.
- The IV BSA, with admin privileges for a particular CRID, can approve other users and give them access to the visibility data for that CRID.
- In the future Release 2, there will be a more robust permissions management process in IV™ and the IV™ BSA or IV™ BSA Delegates will be able to assign admin roles to different users.
- To safeguard the correct person signing up for the IV™ BSA role, the long term solution will be implemented in a future phase in CustReg with a required authorization code that will be provided by the Help Desk. Additional users can be assigned by the IV™ BSA as IV™ BSA delegates.
- The processes for gaining access to the IV™ Service through the BCG are depicted in the follow slide:



Gaining Access to IV Service Through BCG

Establish IV Business Service Administrator (BSA) – Short-Term Process:

- a. User requests access for IV Service for CRID through Business Customer Gateway (BCG).
- b. First user to request access to IV for CRID will be asked to become the IV BSA.
- c. BSA must then enter Authorization Code obtained from help desk on IV website to complete set up of CRID.

Note: Until the BSA enters the authorization code for that CRID in IV, users who log into the system will be unable to view data for that CRID.

Merging the Authorization Code Process into CustReg – Long-Term Process:

- a. User requests access for IV Service for CRID through BCG.
- b. First user to request access to IV for CRID will be asked to become the IV BSA and be required to enter the authorization code to become the BSA.

Additional Users Requesting Access to a CRID through IV Service

- a. User requests access for IV Service for CRID through BCG.
- b. BSA approves or denies access.

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- The following concerns regarding the IV™ BSA process were voiced:
 - What validation procedures are being put in place to ensure the first person who requests permission in the Gateway for a particular CRID, and who is prompted to be the IV™ BSA is in fact the person that the company entrusts the role to?
 - Specific to the CRID, is there no granularity for the set-up? A CRID can have multiple MIDS under it. IMb Tracing data is managed at the MID level. This granularity will go away with IV™ until the Roles/Permissions Management features are deployed in IV™ MTR Release 2. For example, if there are 15 MIDS under 1 CRID there is no option to limit visibility to a subset of those 15 MIDS.
 - Has IV™ spoken to the Payment Modernization group to coordinate how the long-term CustReg BSA authorization solution is being developed?
 - There is a perceived need to raise the communication issue and the plan to use the authorization code long term to MTAC Leadership, so others realize there is a solution being planned into the future.
 - It is not clear how the solutions presented will offer more security. How will the identity of the person requesting the IV™ BSA role be verified? How will the Help Desk determine if the individual has a legitimate need?
 - In regards to the potential for multiple responses and conflicts between individuals who want to be the IV™ BSA, would it not be better to take the Help Desk out of the role of referee?
 - It was recommended to always use the term “IV™ BSA” in documentation, as the term BSA is being used across USPS for other purposes.
- A number of solutions were offered to the above concerns.
 - Amy explained that with IV™ migration, the intention is to contact the primary and technical contacts in the existing customer database and ask them who they want to delegate as the IV™ BSA.
 - The IV™ team is drafting an email that will be sent from the Help Desk to existing customers explaining what will be requested of them. The draft verbiage will be sent to this User Group prior to being sent out.
 - The process for existing customers will include a procedure for any duplicate occurrences. These will be mitigated by the Help Desk who will work with both parties to gain concurrence.
 - In instances where we do not receive a response right away, the Help Desk will follow up by email until an IV™ BSA is selected.

General

- The new IV™ service will be accessed through the Business Customer Gateway.
- Data delegation, data latency and completeness will be tested for during the planned pilot, where a few companies will be asked to join IV™ on test calls, to provide feedback on the system timeliness, suggest if

PRODUCT INFORMATION

any changes to frequency are warranted, and to confirm whether our customers' expectations are being met.

- IV™ will port over existing push subscriptions.

Any Other Business

- Tracy – In addition to BPM STIDS being released on May 22nd, will Reply Mail STIDs be used in place for the ZIP for data delegation?
- Himesh confirmed that Reply Mail is on board and he is in the process of verifying the communication plan with Mailing Standards.
- Industry members acknowledged they are ready to use the new STIDS as listed in the following categories: Courtesy Mail, Reply Mail and First Class.
- Lisa – suggested the last category “First Class” should actually be *Permit Reply Mail*.
- Angelo – requested an update on the political mail dashboard, and Himesh agreed.
- Himesh – stated that in closing, at the next MTAC UG4 meeting we will have a transparent discussion of data delegation and data access.

Action Item: Himesh to reach out to Chris Karpenko for his availability.

Action Item: Amy to take any additional issues discussed today off line and review what the possible solutions are.

The meeting was adjourned.