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INFORMED VISIBILITY®

Provisioning Informed Delivery® Post Campaign (IDPC) Data in Informed Visibility Mail Tracking & Reporting (IV® -MTR)

v1.3, June 17, 2025

Contents

- Welcome to this guide for **Provisioning Informed Delivery Post-Campaign (IDPC) Detailed Data** through the **Informed Visibility® Mail Tracking & Reporting (IV-MTR)** application.
- This guide provides information about:
  - The IV-MTR application
  - Setting up your IV-MTR account to receive Informed Delivery Post-Campaign Detailed data*
  - Creating queries and feeds to receive data
  - Modifying and deleting your IDPC data feeds
  - Data file conventions and characteristics
  - Troubleshooting resources, including tutorial videos, detailed documentation, and contact info for the IV Solutions Center and the Informed Delivery Interactive Campaigns Support Team
- It also provides high-level guidance for:
  - Delegating data between Customer Registration IDs (CRIDs)
  - Managing servers associated with your IV-MTR account

**Informed Delivery Pre-Campaign Analysis and Post-Campaign Summary data are not currently available via IV-MTR. For information on receiving these reports, please see the Mailer Campaign Portal User Guide.*

Overview

IV-MTR is a United States Postal Service® (USPS ®) application that allows mailers to receive the following types of Postal data:

- **Mail Tracking (Scan) Data**
  - Event-based data that allows mailers to see where their mail is in the mailstream
- **Informed Delivery Post-Campaign (IDPC) Detailed Data**
  - Data for Informed Delivery interactive campaigns, including:
    - Click-throughs
    - Email Opens
    - Delivery Dates
    - Recipient ZIP
    - Image Placement in Email
- **Enterprise Payment System (EPS) Data**
  - Payment data for mailings, PO Boxes, and other Postal products
- **Package Platform Concept (PPC) Data**
  - Physical and payment data for packages
- **Mail Quality Data (MQD) Data**
  - Detailed error data from the Mailer Scorecard

IDPC Data in IV-MTR

- The IDPC data available in IV-MTR is pass-through data that is not generated by IV-MTR itself
  - Please see the IDPC Data Dictionary for information about the data provided in IV-MTR
  - Additional information about the Post-Campaign Reports generated in the Mailer Campaign Portal (MCP) can be found in the Informed Delivery Interactive Campaign Guide

- IDPC data in IV-MTR is available through one-time queries and data feeds
  - **One-Time Queries** are one-time (ad hoc) searches for a particular set of records. They:
    - Provide historical data*
    - Produce files that can be sent to a server or downloaded online
  - **Data Feeds** are subscriptions that allow you to receive data at intervals you select. They:
    - Provide data from the current day forward
    - Produce files that can be sent to a server or downloaded online

**In IV-MTR, IDPC data will only be available for dates after 6/12/20, the date that IV-MTR began provisioning IDPC data. For IDPC data generated before 6/12/20, please see the MCP.*

- The one-time query and data feed output files are described in the table below.

File Format	Delimited (Importable into Excel)	JavaScript Object Notation (JSON)
Description	Text file that allows you to specify the delimiter character	Lightweight, text-based standard designed for data interchange
Query Type	One-Time Query & Data Feeds	Data Feeds Only
Available Delivery Methods	Secure File Transfer Protocol (SFTP) server* Online download	SFTP server* JSON web service Online download

- Delimited files are easily imported into Microsoft Excel. Instructions for completing this task can be found on the Microsoft Office Help Site or in the IV-MTR User Guide.

- Detailed information about the output files, including naming conventions and formatting information, is provided in the File Characteristics & Conventions appendix.

**If using SFTP, be sure to add the IV-MTR-specific IP addresses to your server firewall to ensure your system can receive data from IV-MTR. The IV-MTR IP addresses are available from the IV Solutions Center.*

To receive IDPC data through IV-MTR, you need:

1. A Business Customer Gateway (BCG) account
2. IV-MTR privileges (requested and granted through the BCG)
3. Informed Delivery Mailer Campaign Portal (MCP) privileges (requested and granted through the BCG*)
4. A Business Service Administrator (BSA) to activate your CRID(s) in IV-MTR

Detailed instructions for completing these steps are available in the Applying for Access to IV-MTR training and IV-MTR User Guide document.

Please note the following about Informed Delivery Post-Campaign data:

- **Data is near-real time in IV-MTR.** Records are provided as soon as they are available. If accessed through the MCP instead of IV-MTR, IDPC data is updated once a day in the evenings, and the records are cumulative – each individual mailpiece only has one record in the report.
- **Data has a set reporting period.** Campaign reporting begins on the Campaign's start date and ends on the Campaign's end date. After that time, historical data will be accessible, but no new data will be generated.

**Informed Delivery MCP privileges are requested using the instructions here.*

User Access

Access to IV-MTR is restricted by user level. Before proceeding, users must verify they have the correct level of access to create the query/feed they are interested in.

- **One-Time Queries** – All users can access this area of the application.
  - All users can create and view queries if they use the Online Download delivery method
  - Only BSAs, BSA Delegates, and users that have been granted Subscription Manager roles can use the Send to Address delivery method
- **Data Feeds** – Only BSAs, BSA Delegates, and users that have been granted Subscription Manager roles can access this area of the application and create or manage data feeds.
  - By default, all users can view existing data feeds.

For more information on the user levels and roles in IV-MTR, please see the IV-MTR User Guide.

Special Scenarios

The IV-MTR application allows you to access and manage IDPC data for your organization. There are some special scenarios to consider before setting up your queries and feeds.

Want to share visibility of your IDPC data with another user or CRID?

- If you would like to share your IDPC campaign data with other users in your organization/CRID or a different organization/CRID altogether, use the IV-MTR feature of Data Delegation.
- See the Data Delegation appendix for more information.

Only want to share your IDPC data?

- If your organization would like to delegate its IDPC data information to a third party (such as a mail service provider) instead of directly accessing and managing the IDPC information itself, it may not be necessary to register for the IV-MTR service.*
- Contact the IV Solutions Center for more information.

**Note that BCG registration will still be required.*

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Ready to Begin

When you are ready to set up IDPC data in your IV-MTR account, proceed to the appropriate section:

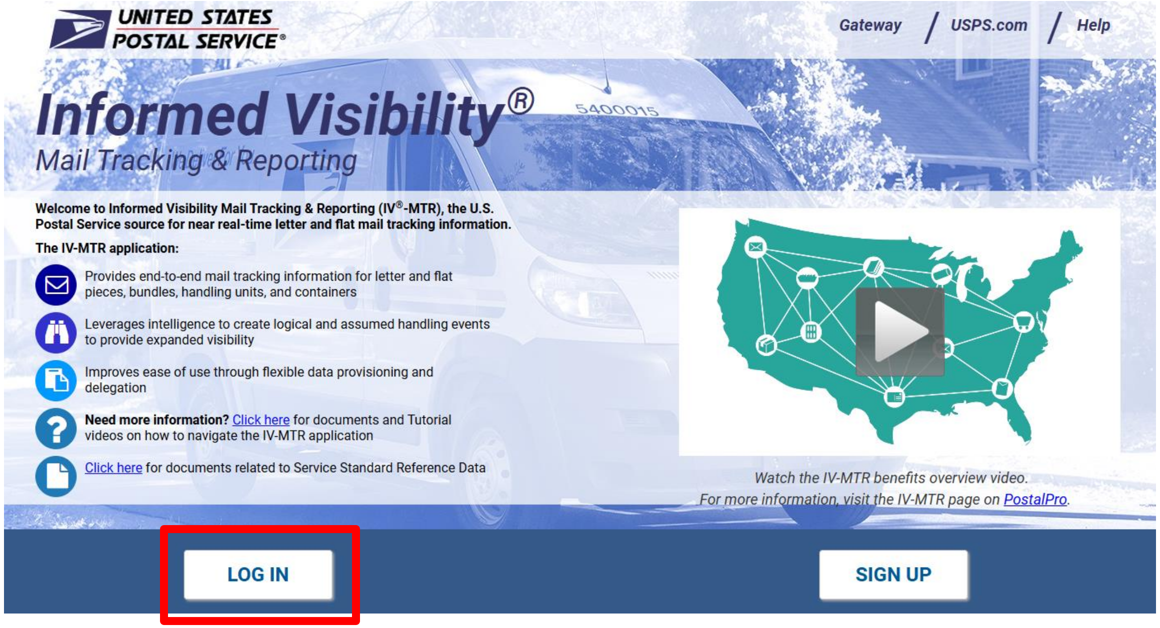
- Creating and viewing a One-Time Query
- Creating and viewing a Data Feed
- Managing Existing Data Feeds
- Troubleshooting Resources
- Adding Servers to Your IV-MTR Address Book
- Data Delegation Overview

Creating an IDPC One-Time Query

Access the IV-MTR Application

Option 1: Directly

1. Go to https://iv.usps.com.
2. Click **LOG IN** and enter your credentials.

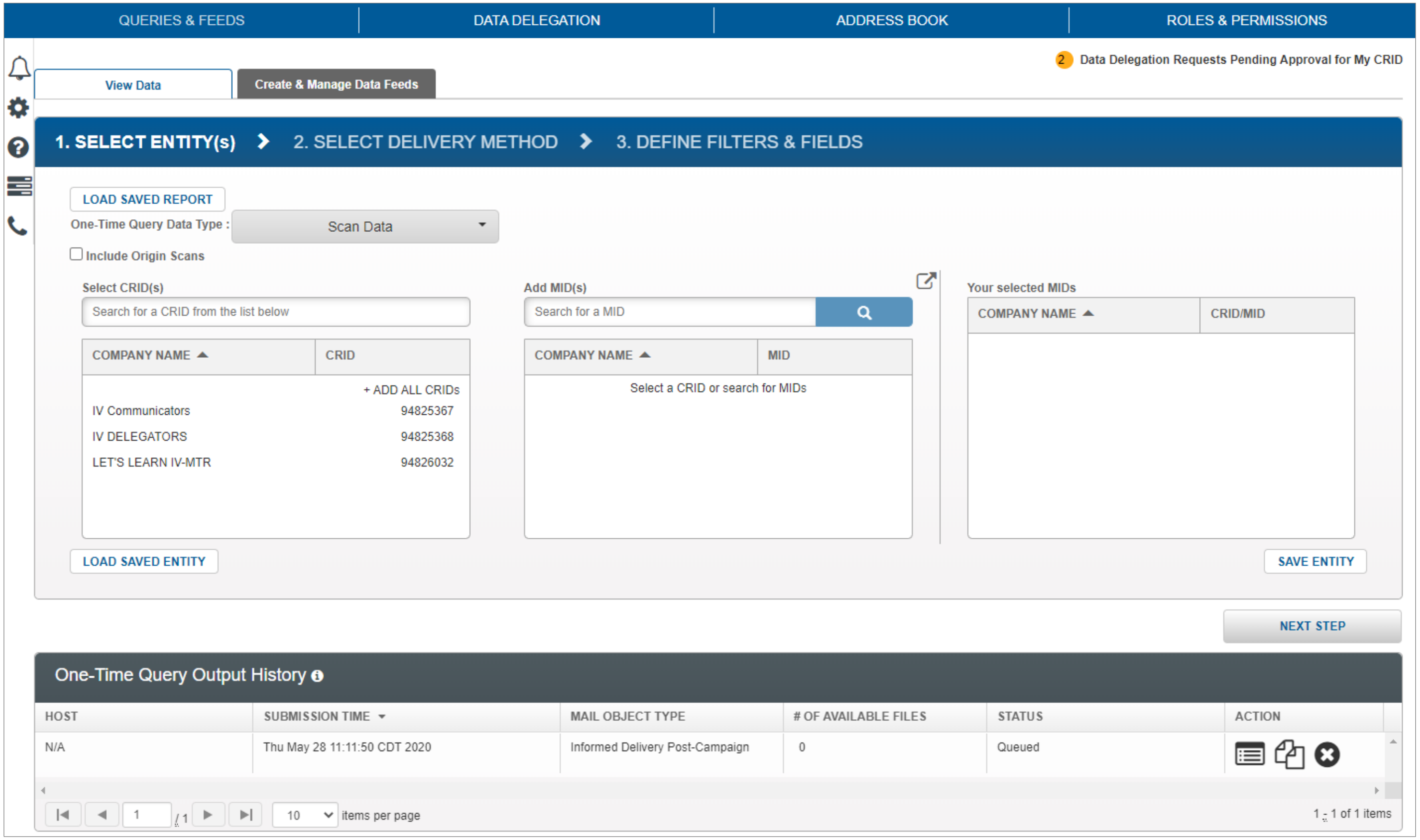


Option 2: Through the BCG

1. Log into https://gateway.usps.com.
2. Go to **Mailing Services** > **Informed Visibility**.
3. Click **GO TO SERVICE**.

Create a One-Time Query

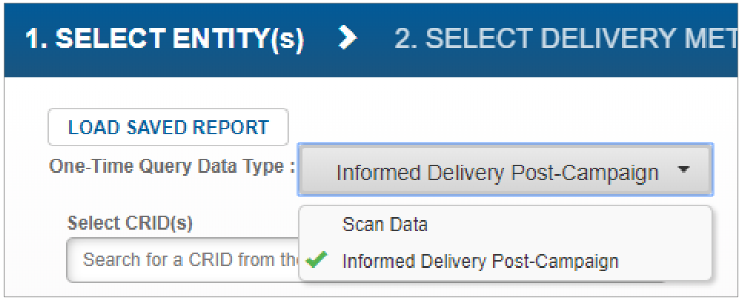
- When you log in to IV-MTR, the homepage (the **Queries & Feeds** page) appears, set to the **View Data** tab.
- There are two sections on this page:
  - The top section allows you to create one-time queries
  - The bottom section, **One-Time Query Output History**, contains the results of one-time queries created in the past 72 hours.



Select Entity(s): Choose a Data Type

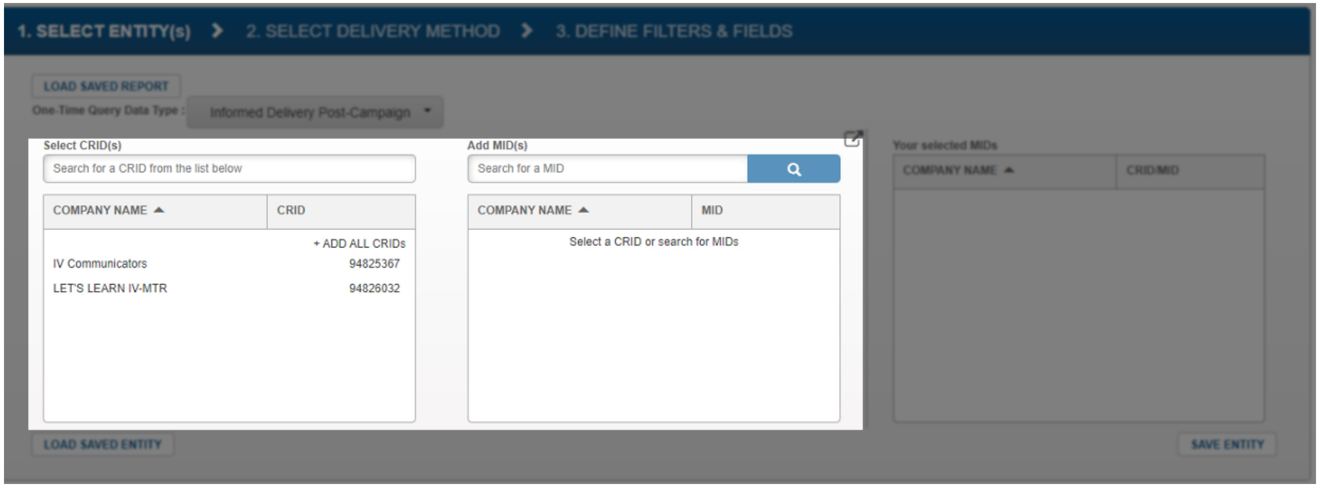
- **To begin a one-time query, locate the Select Entity section at the top of the screen.**
- This area allows you to choose what type of data and CRIDs/Mailer IDs (MIDs) you will receive data for.
- Choose your data type:

1. In the **One-Time Query Data Type** drop down menu, select **Informed Delivery Post-Campaign**.

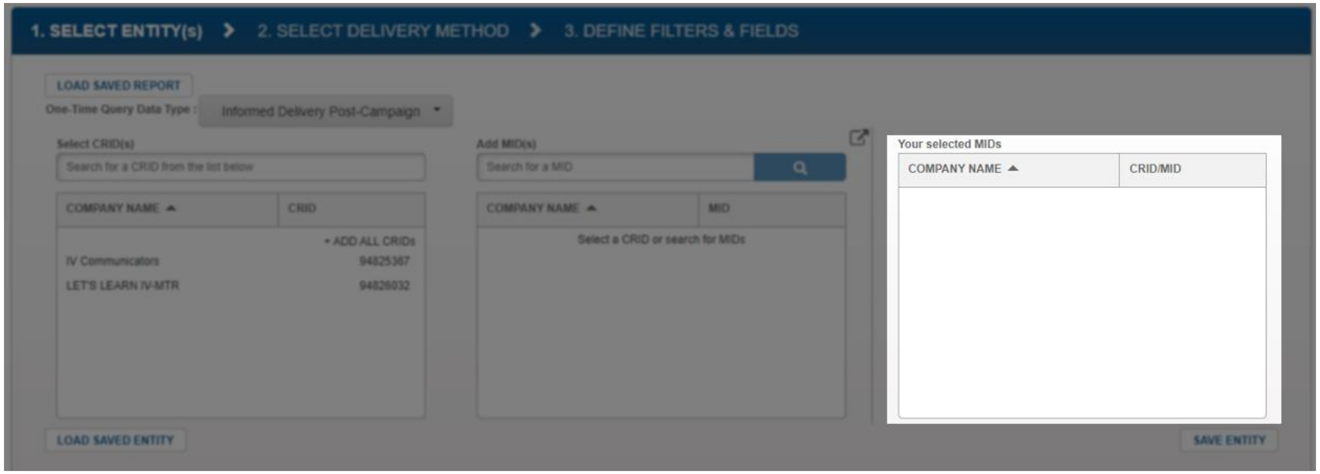


Select Entity(s): Choose an Entity

- The **Select CRID(s)** section allows you to choose the CRIDs and MIDs you want to receive data for in your query.
  - The left side of the screen provides tools for selecting your entities.



  - The right side of the screen displays the entities you have selected for the query



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Select Entity(s): Data Availability

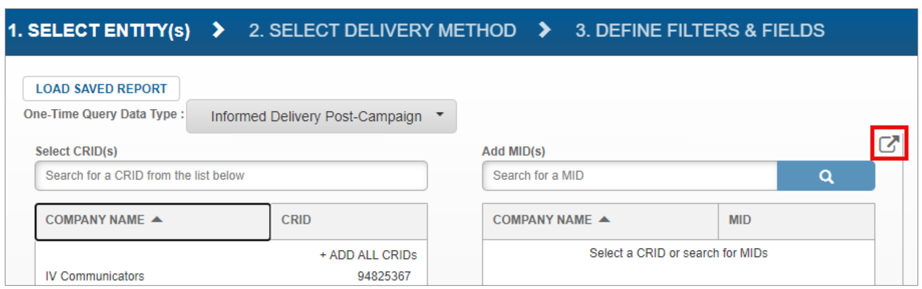
You can choose entities that:

- You have access to (either by having the IV-MTR service for the entity in the BCG or by being delegated visibility of the entity), and
- You have visibility permissions for (managed using IV-MTR's Roles & Permissions feature)

By default, users always have visibility permissions for the entities they have access to in IV-MTR. If you have any questions about your visibility permissions, please see your BSA.

To see a list of all the CRIDs and MIDs you can choose from:

1. Click the **Export** icon to the right of the Add MID(s) section.



2. Choose a file type from the Export popup and click **Export.**
3. A file will download, listing all the entities you have access and visibility for.

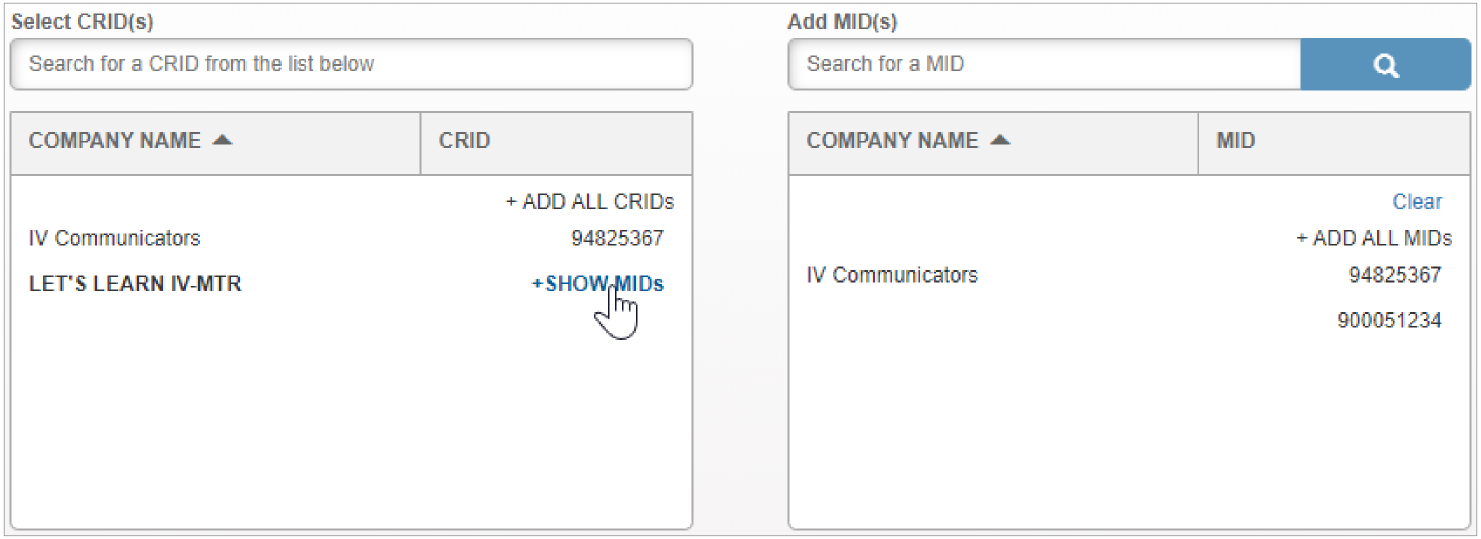
	A	B	C	D
1	CRID	Company Name	MID	Routing Code
2	94825367	IV Communicators	900051234	
3	94825367	IV Communicators		130008743
4	94825368	IV DELEGATORS	901060362	
5	94826032	LET'S LEARN IV-MTR	900055678	
6	94826032	LET'S LEARN IV-MTR		937652341

Select Entity(s): Choose a CRID

The **Select CRID(s)** pane lets you select the CRID(s) your MIDs belong to. You may add as many CRIDs as you like. Add CRID(s) using one of the following methods:

- **To add all CRIDs**: click **+ADD ALL CRIDS**
- **To add an individual CRID listed in the window**: Click the CRID entry
- **To add an individual CRID from a long list**: Use the Search dialog to display the CRID, then click the desired CRID

The CRID(s) move(s) to the **Add MIDs** pane. Repeat this step as necessary until all desired CRIDs have been added.



Once all desired CRIDs have been added, proceed to the next slide.

Select Entity(s): Choose a MID

The **Add MID(s)** pane lets you select the MID(s) you want to include in the query. You may add as many MIDs as you like.

- Your selections in this pane allow you to set the level of the query. Available options are:
  - **MID-level**: only provides data for the selected MID.
  - **CRID-level**: provides data for all MIDs belonging to the CRID.
- By default, the Add MID(s) section does not display all of the MIDs for which you have visibility. MIDs are displayed if you selected CRIDs or if you use the MID search box.

Note: You can choose MIDs that:

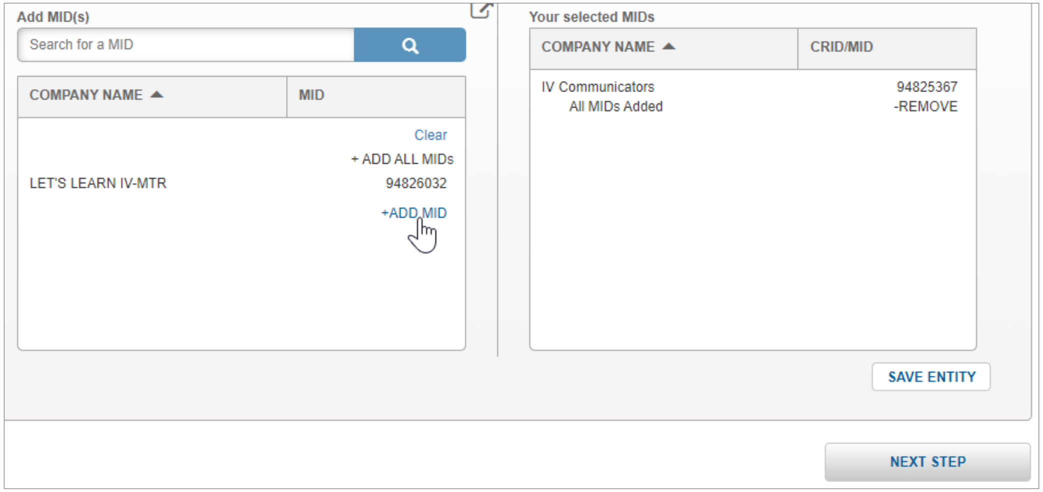
- You have access to (either by having the IV-MTR service for the MID in the BCG or by being delegated visibility of the MID), and
- You have visibility permissions for (managed using IV-MTR's Roles & Permissions feature)

By default, users always have visibility permissions for the MIDs they have access to in IV-MTR. If you have any questions about your visibility permissions, please see your BSA.

If you would like to download a list of your MIDs, please see the Data Availability slide.

Select Entity(s): Choose a MID

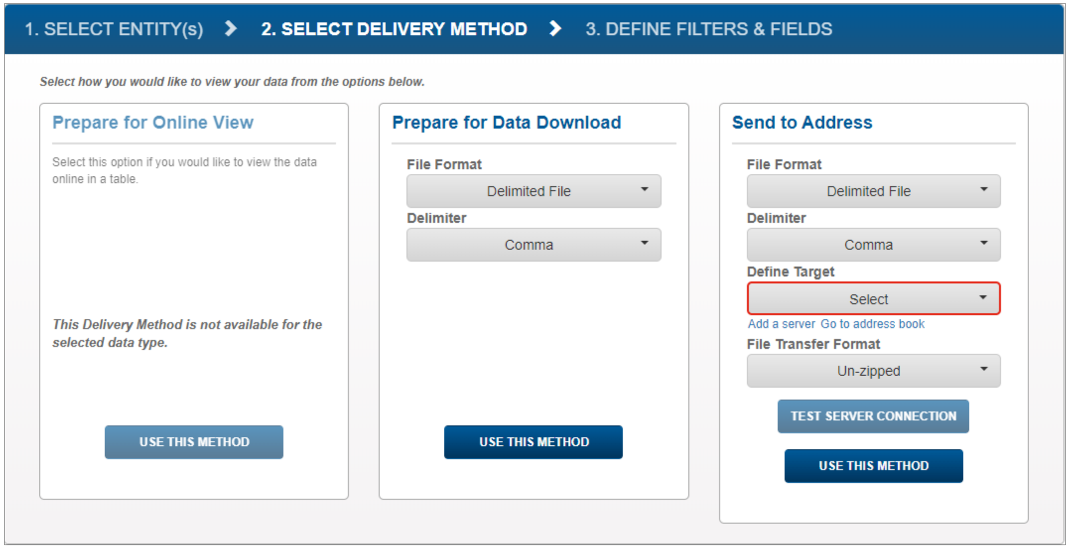
- Add MIDs using one of the following methods:
  - **To add an individual MID:** hover over the MID and click **+ADD MID**
    - Note: Creates a MID-level query.
  - **To add all MIDs for a CRID:** hover over the CRID and click **+ADD ALL**
    - Note: Creates a CRID-level query.
  - **To add all MIDs for all CRIDs at once:** click the **+ADD ALL MIDs** button in the top corner of the MID listing.
    - Note: Creates a CRID-level query for each CRID.
  - **To search for a MID:** Use the **Search** box, then add the MID(s) using one of the options described above.
    - You must enter at least three digits into the box in order to search.
- The MID(s) move(s) to the **Your Selected MIDs** pane.



- Repeat this step as necessary until all desired MIDs have been added, then click **NEXT STEP**.

Select Delivery Method

- The **Select Delivery** screen appears. This screen allows you to choose how your results will be delivered to you.



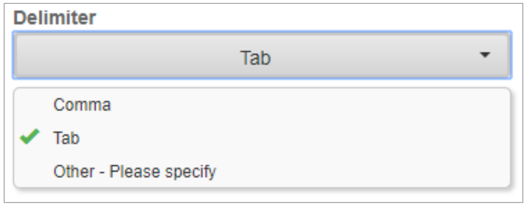
- There are two options available for IDPC one-time queries, as described in the table below. Instructions for each method are provided in the following slides.

Method	Description	Restrictions	Instruction Link
Data Download	The application prepares a file or files of the query results in your selected format for you to download.	N/A	Online Download
Send to Address	The application prepares a file or files of the query results in your selected format and sends the file to an SFTP server.	Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can select this delivery method.	Send to Address

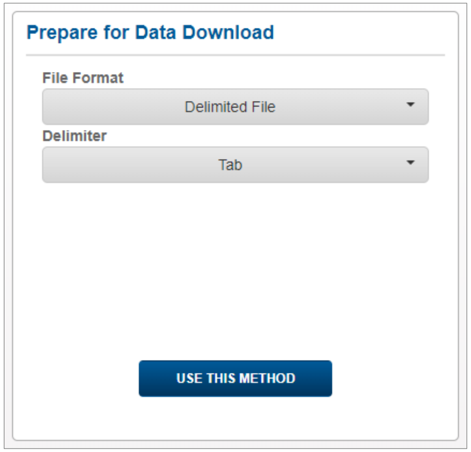
Select Delivery Method: Online Download

- **The data download option prepares a file with your query results that is available within the application.**
  - Files can be downloaded at your leisure, up to 72 hours after they are generated.
  - Files are available in the delimited format.
- To use the Online Download method, follow these steps:

1. In the **Delimiter** dropdown menu, select a delimiter character for your file. If you choose "Other", a new field will appear where you can enter the desired character.
   - **Note:** It is recommended you do not choose Comma as a delimiter in IDPC files since IDPC data itself can contain commas.



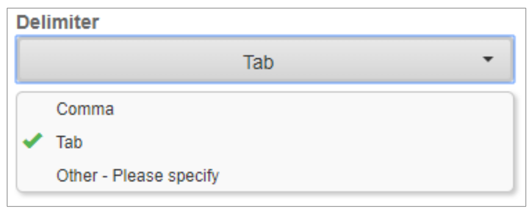
2. Click **USE THIS METHOD**. Then, proceed to Define Filters & Fields.



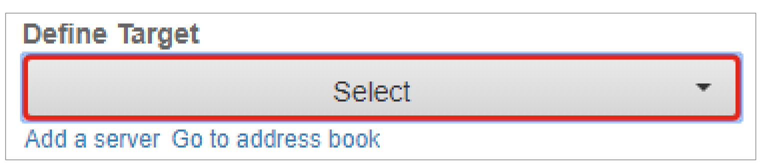
Select Delivery Method: Send to Address

- **The send to address option prepares a file with your query results and sends it to the server of your choosing.**
  - A copy of the file will also be available in the application for you to download up to 72 hours after it has been generated.
  - Files are available in the delimited format.
- To use the Send to Address method, follow these steps:

1. In the **Delimiter** dropdown menu, select a delimiter character for your file. If you choose "Other", a new field will appear where you can enter the desired character.
   - **Note:** It is recommended you do not choose Comma as a delimiter in IDPC files since IDPC data itself can contain commas.

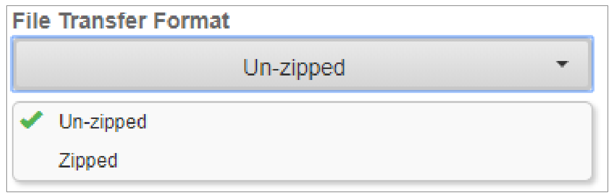


2. In the **Define Target** drop down, select the target server(s).
   - The Define Target drop down is populated with servers already listed in your IV-MTR Address Book. If you need to add a new server to the list, click the **Add a server** link and follow the instructions in the Adding a Server to the Address Book appendix.

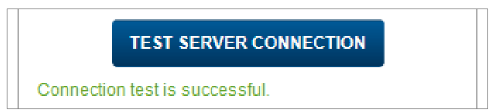


Select Delivery Method: Send to Address

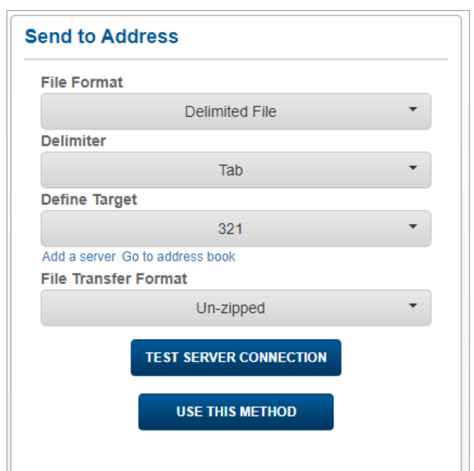
3. In the **File Transfer Format** drop down, choose how you want to receive your files:
   - Zipped = small, compressed file that needs to be extracted before it can be used
   - Unzipped = larger, uncompressed file that is ready to use



4. **Optional:** If you would like to test the application's connection to the server(s) you chose, click **TEST SERVER CONNECTION**. A success or failure message will appear.

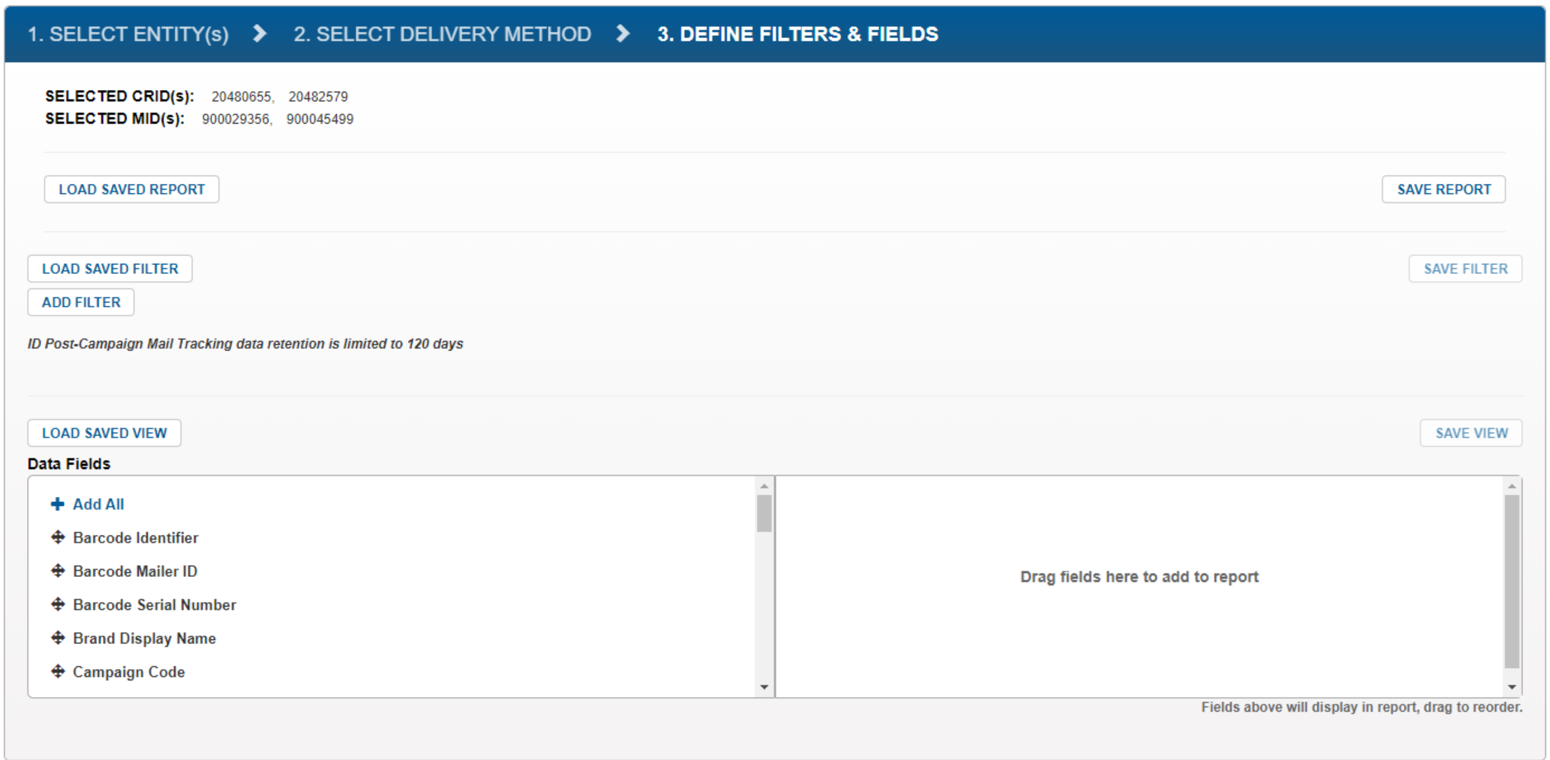


5. Click **USE THIS METHOD**.



Define Filters & Fields

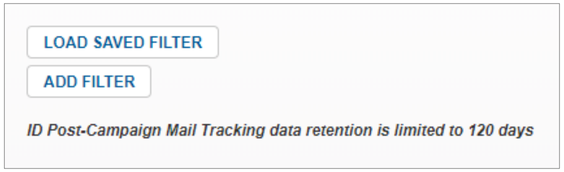
- The **Define Filters & Fields** screen appears. This screen allows you to choose the data filters and fields you are interested in.
  - To add one or more filters (optional): click here
  - To skip adding filters and begin selecting your data fields, click here.



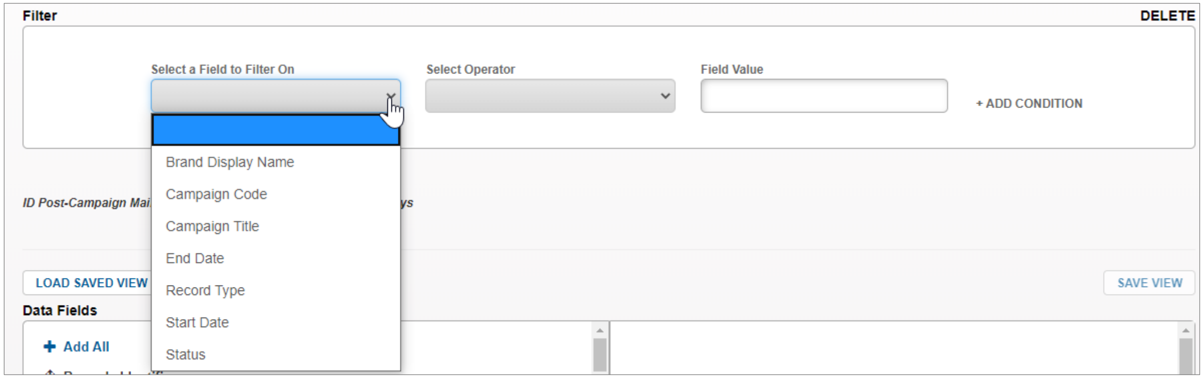
Define Filters & Fields: Adding Filters

To add a filter, follow these steps:

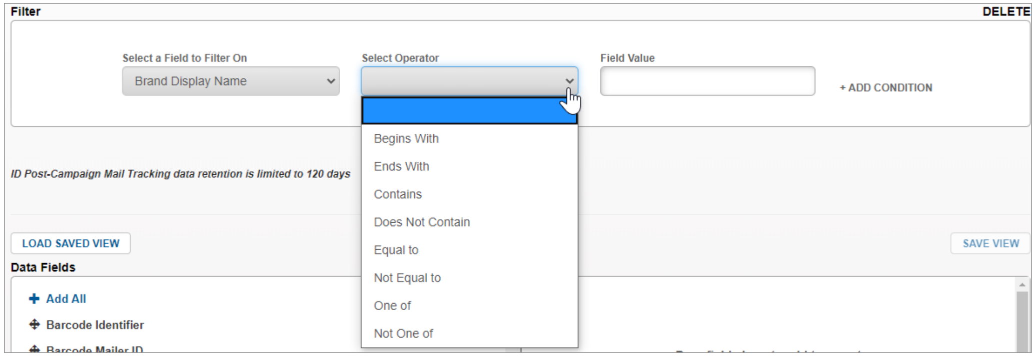
1. Click the **ADD FILTER** button.



2. The Filter section appears. In the **Select a Field to Filter On** dropdown menu, choose your desired filter.

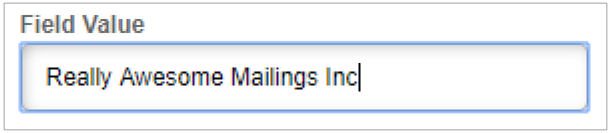


3. In the **Select Operator** drop down, select the condition you would like to use.



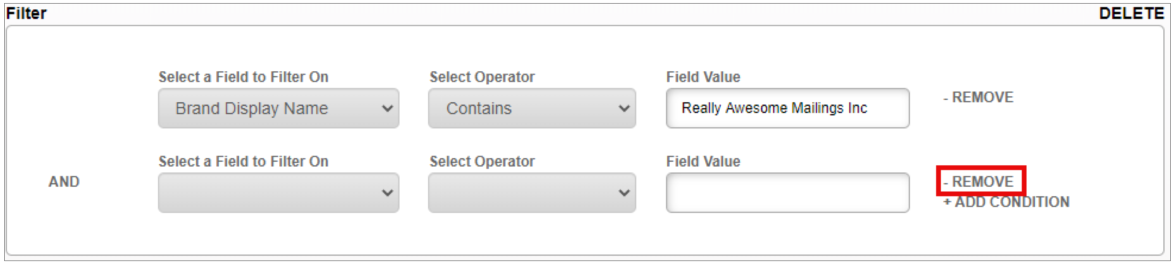
Define Filters & Fields: Adding Filters

4. In the **Field Value** area, enter the desired value.
   - If you chose *One of* or *Not One of* as the operator, you can enter multiple values. Separate values using commas without a space (e.g., 123456,123457,123458).



- To add additional filters, click the **+ ADD CONDITION** link to the far right of the existing filter. A new set of filter fields appears. Populate them using the steps for your existing filters.

- To remove one filter, click the **– REMOVE** link to the far right of the filter

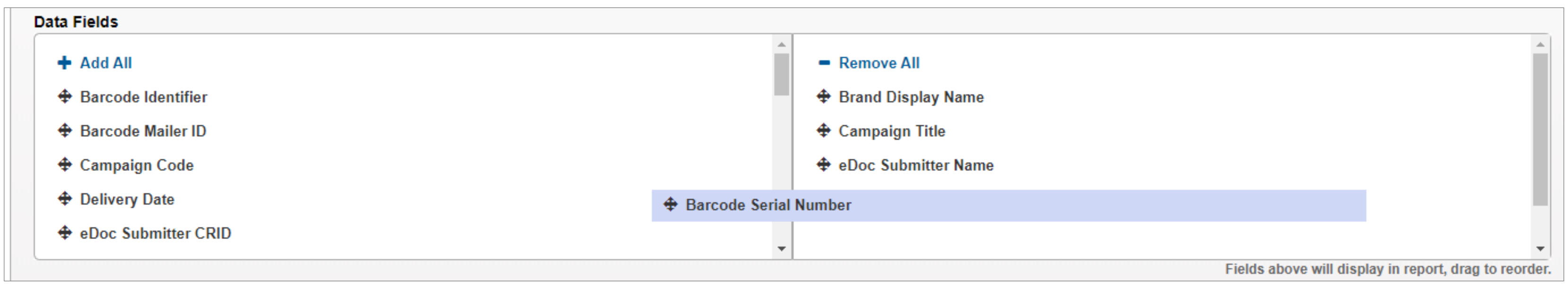


- To remove all filters, click the **DELETE** link on the top right corner of the filters area.

- When you have finished adding filters, proceed to the next slide.

Define Filters & Fields: Organizing Fields

- The **Data Fields** section allows you to choose the specific fields you receive in your results. You can also choose the order they appear in.
  - The fields on the left are available to be added, and the fields on the right are already included in your query.
  - **Drag** or **double-click** fields to move them from one side to the other. To add all available data fields, click **+ Add All.**
  - For details about the data fields themselves, please see the IDPC Data Dictionary.



  - Once you have selected the data fields to be included, arrange them in your preferred order by dragging and dropping them on the right side of the Data Fields section.

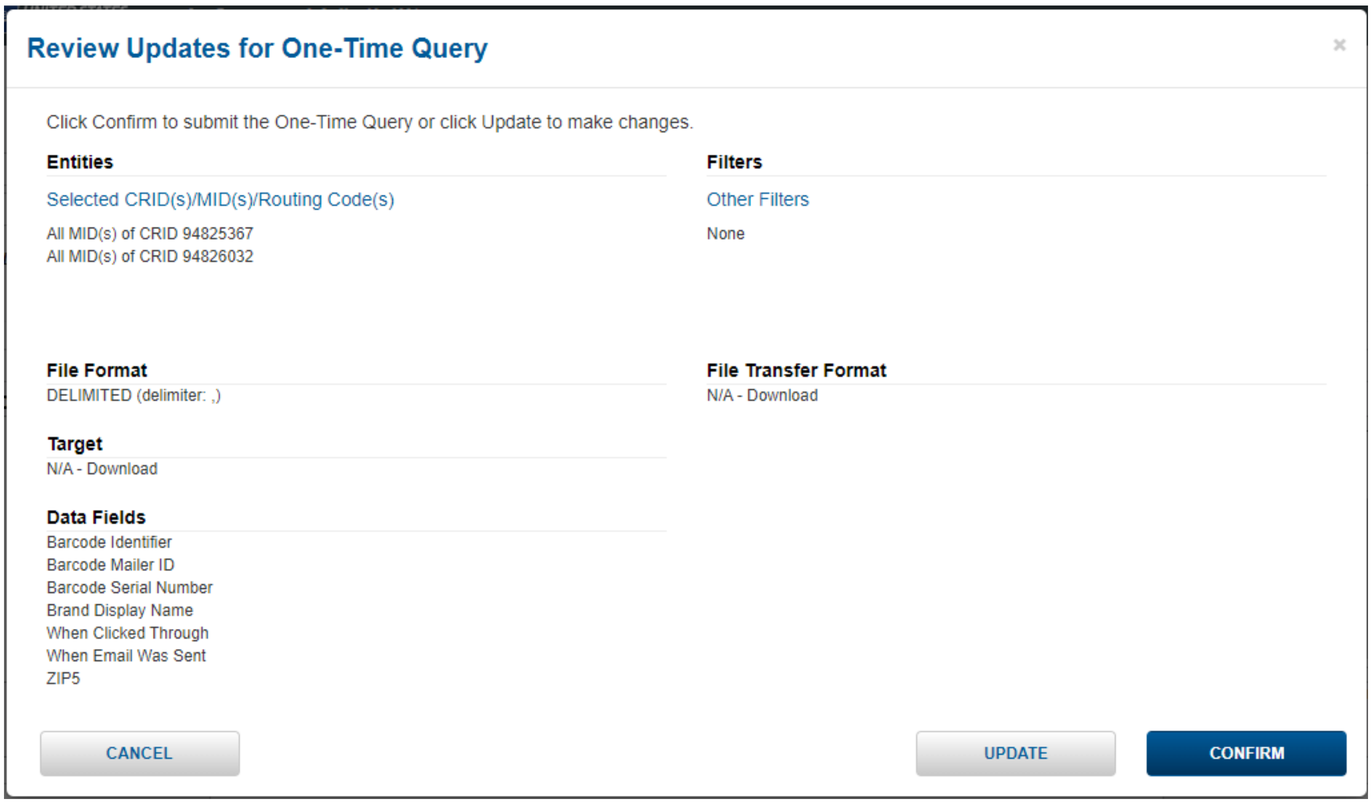
Submitting Your Query

When you have finished organizing your fields and are ready to submit your query, follow these steps:

1. Click **FINISH.**

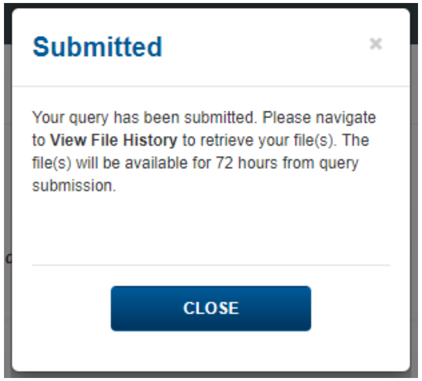
Submitting Your Query: Confirmation

2. A confirmation screen will appear listing the details of your query. Review the details and proceed as follows:
   - **If your query is ready to submit,** click **CONFIRM**.
   - **If you need to edit your query,** click **UPDATE**. You will be returned to the previous screen where you can make updates as needed
   - **If you want to discard this query and start over,** click **CANCEL**. You will be returned to the Select Entities screen, where you can begin a new one-time query if desired.

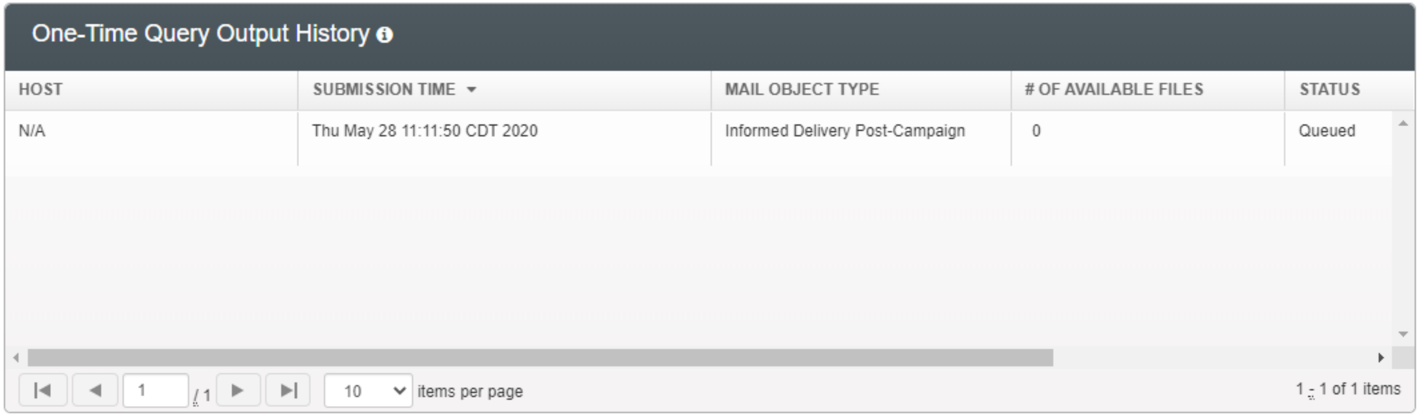


Submitting Your Query

- A popup will appear, confirming your query has been submitted.



- **One-time query creation is now complete.** The new query will appear in the One-time Query Output History table.
  - For instructions on reviewing the feed's output files, see the next slide.



One-Time Query Output History

HOST	SUBMISSION TIME	MAIL OBJECT TYPE	# OF AVAILABLE FILES	STATUS
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	0	Queued

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Retrieving Query Results

- After a query has been submitted, it is placed in the processing queue for your account.
  - **Online Download only:** Once the query has been processed, you will be notified per your notification settings (see the IV-MTR User Guide for details).

- The results of your one-time query are available as follows:
  - **Online Download:** files can *only* be accessed from the One-Time Query Output History.
  - **Send to Address:** files are sent to the server you chose during query set up. A copy of the files sent to your server can also be accessed and re-downloaded from the One-Time Query Output History if needed.

One-Time Query Output History

HOST	SUBMISSION TIME	MAIL OBJECT TYPE	# OF AVAILABLE FILES	STATUS	ACTION
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	1	Complete	

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- For instructions on accessing files from the One-Time Query Output History Table, see the next slide.

Retrieving Query Results: Viewing Files

To view your query results, follow these steps:

1. Locate the query in the One-Time Query Output History table and click its **Files** icon.

One-Time Query Output History

HOST	SUBMISSION TIME	MAIL OBJECT TYPE	# OF AVAILABLE FILES	STATUS	ACTION
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	1	Complete	

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2. The Available Files popup appears, listing the files available for the query. Click the **Download** icon. The file will download so you can open it to review.
   - Files contain a maximum of 100,000 records. If your query returns more than 100,000 records, multiple files will be created. See Appendix B. File Characteristics & Conventions for details.

Available Files

FILE NAME	TOTAL SCANS	DOWNLOAD TIME	MOST RECENT ATTEMPT	DELIVERY SUCCESS	ACTION
20200528113...	22508				

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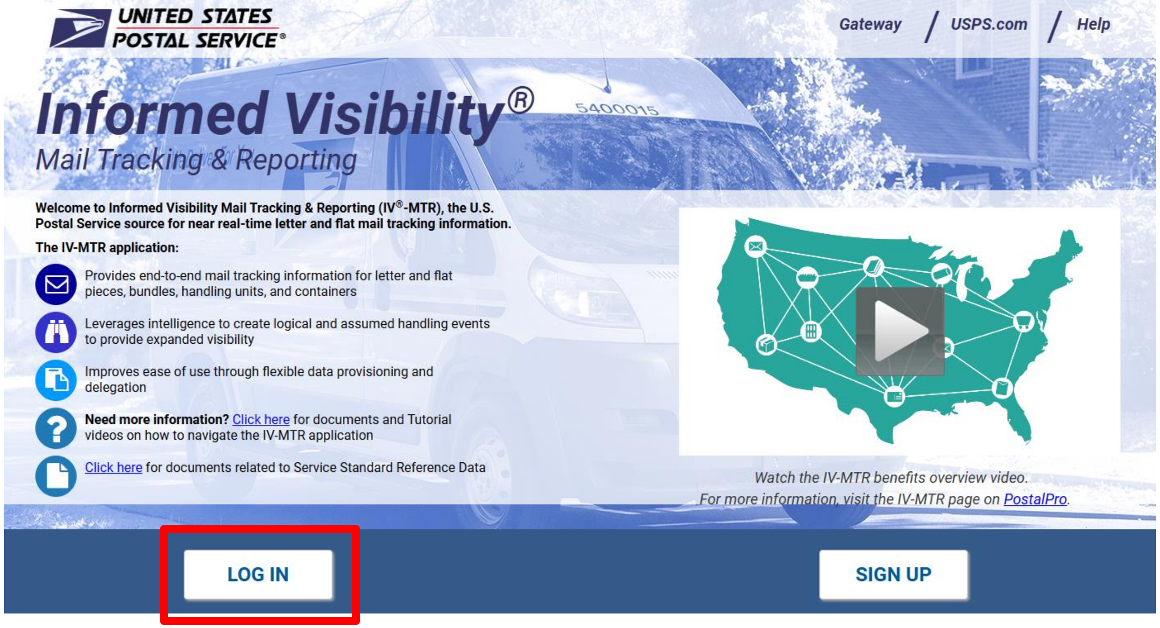
Files are saved for 72 hours

CLOSE

Creating an IDPC Data Feed

Option 1: Directly

1. Go to https://iv.usps.com.
2. Click **LOG IN** and enter your credentials.

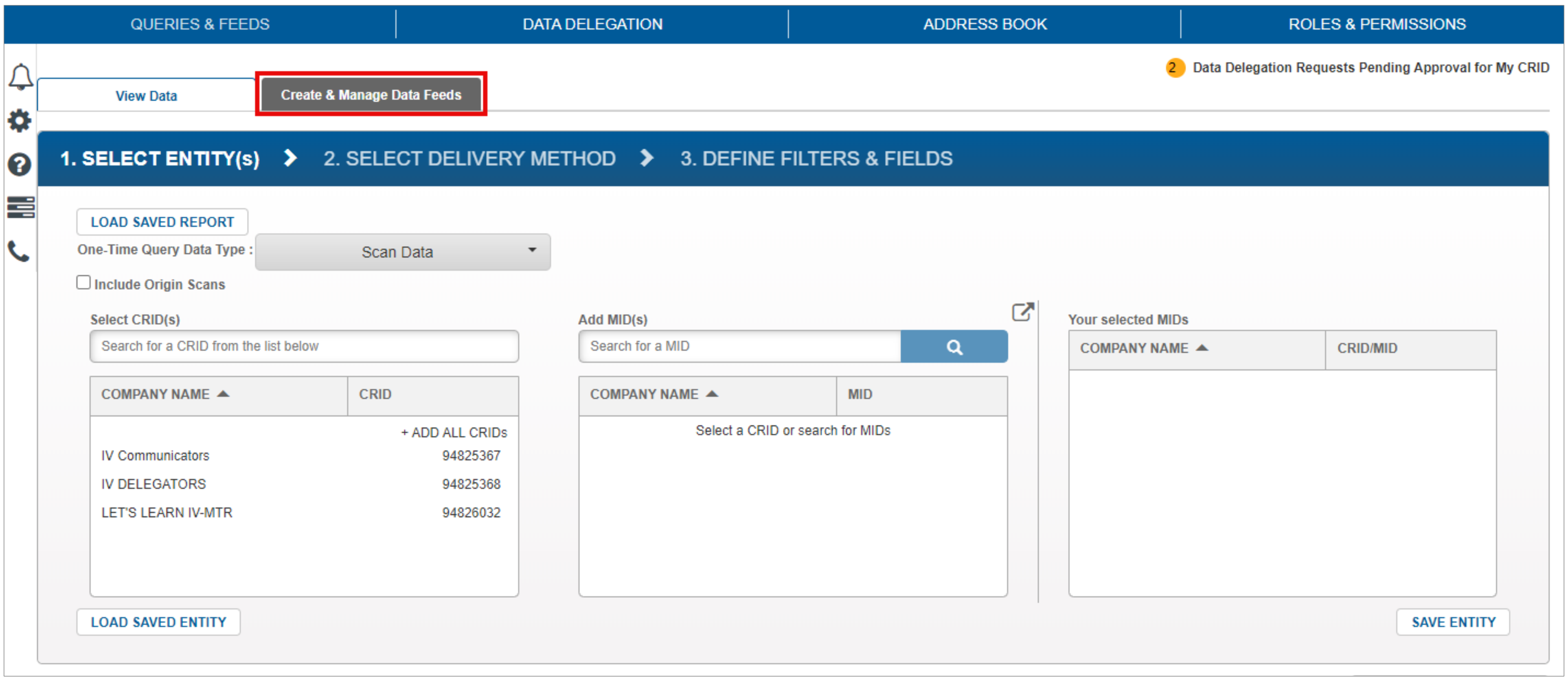


Option 2: Through the BCG

1. Log into https://gateway.usps.com.
2. Go to **Mailing Services** > **Informed Visibility**.
3. Click **GO TO SERVICE**.

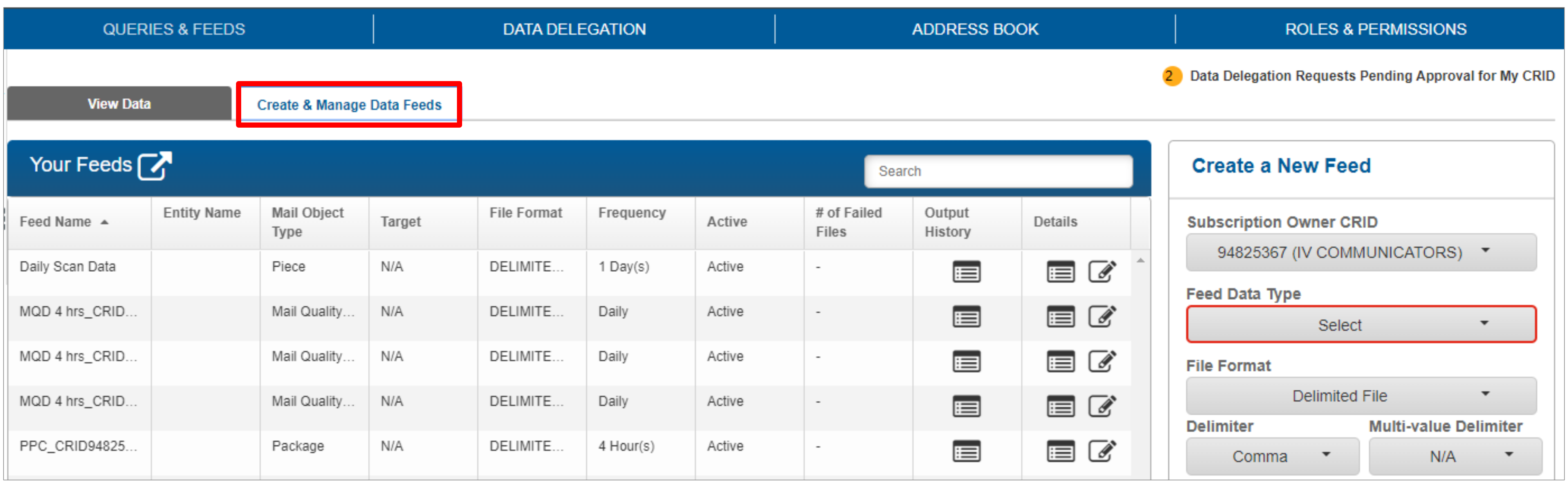
Create a Data Feed

- When you log in to IV-MTR, the homepage (the **Queries & Feeds** page) appears.
- To begin setting up a data feed, click the **Create & Manage Data Feeds** tab.



Create a Data Feed

- The Create & Manage Data Feeds screen appears. There are two sections at the top of this page:
  - The **Your Feeds** section on the left displays existing data feeds. Here you can view or modify the details of a data feed and view or retrieve a feed's output history.
    - This area is viewable by all users.
  - The **Create a New Feed** section on the right is where you create a new data feed.
    - This area is only viewable to BSAs, BSA Delegates, or Subscription Managers.



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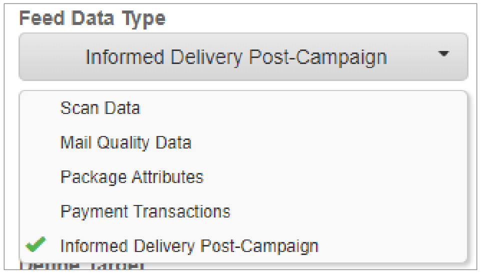
Create a Data Feed: Select Initial Options

- To create a data feed, locate the **Create a New Feed** section.

1. In the **Subscription Owner CRID** section, select the CRID the data feed will “belong to”
   - Use the CRID whose IV-MTR BSA, BSA Delegates, and Subscription Managers will be responsible for maintaining the data feed in the future
   - The CRID selected will impact what entities are available to select in the next screen

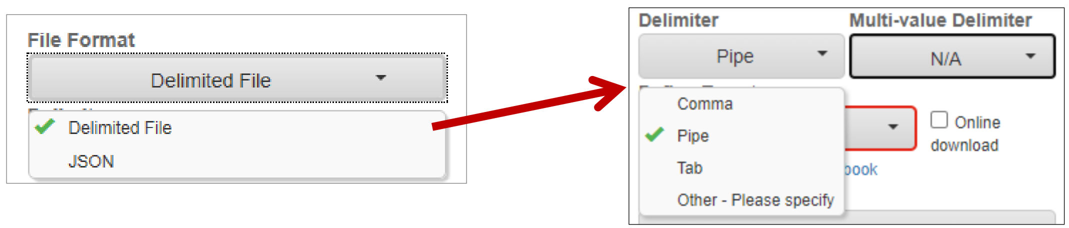
2. In the **Feed Data Type** section, choose **Informed Delivery Post-Campaign**.



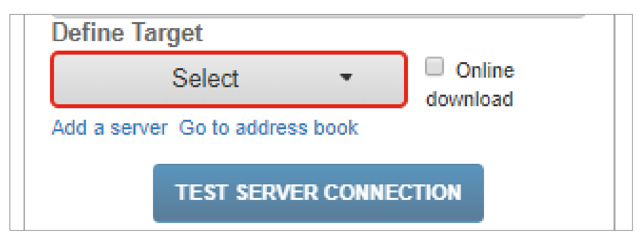
Note: If you do not see the desired data type in the drop down menu, you do not have the necessary privileges. See the Getting Started slide for information about requesting IDPC privileges.

Create a Data Feed: Select Initial Options

3. In the **File Format** section, select **Delimited File** or **JSON**.
   - If you select the delimited format, make a selection from the **Delimiter** and **Multi-value Delimiter** drop-down menus.
     - **Note:** It is recommended you do *not* choose Comma as a delimiter in IDPC files since IDPC data itself can contain commas.



4. In the **Define Target** section, select where to send the files. Available options are:
   - **Server** – IV-MTR will push the output files to an SFTP server you choose (see step 4.a)
   - **Web Service** – IV-MTR will push the output files to a JSON web service (See step 4.a)
   - **Online Download** – IV-MTR will display the output files within the IV-MTR application, where you can download them (see step 4.b)



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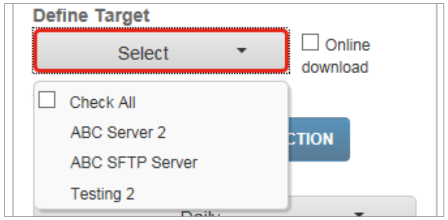
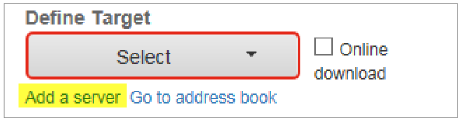
Create a Data Feed: Select Initial Options

a. **Server download**: In the **Define Target** drop down, select the target server(s)

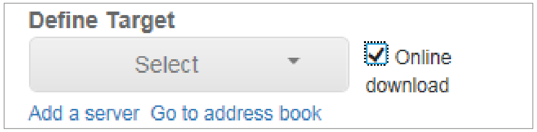
- The Define Target drop down is populated with servers already listed in your IV-MTR Address Book. If you need to add a new server to the list, click the **Add a server** link and follow the instructions in the [Adding a Server to the Address Book appendix](#).





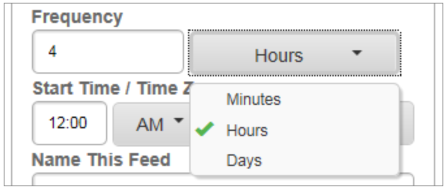
b. **Online download:** Check the box for **Online download**.

- This automatically greys out the Define Target option, as a target server is not needed for this option.



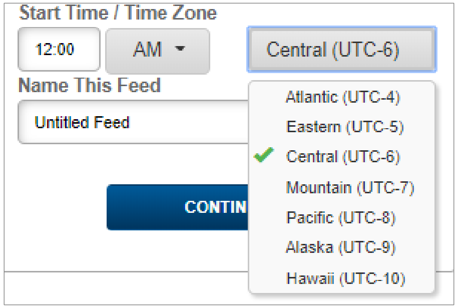
5. The **Frequency** section allows you to choose how often you want to receive data from the feed. In the **Frequency** field, enter a value and select minutes, hours, or days from the drop down menu.

- By default, the frequency is set to every 4 hours. However, you can customize this from as often as every minute to as long as every 31 days.

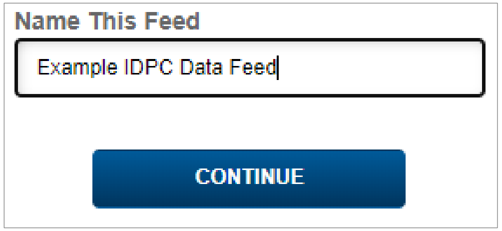


Create a Data Feed: Select Initial Options

6. In the **Start Time / Time Zone** section, enter a start time, select AM or PM, and select a time zone. The data feed will be active once it is created and will send data according to the selected frequency and start time.



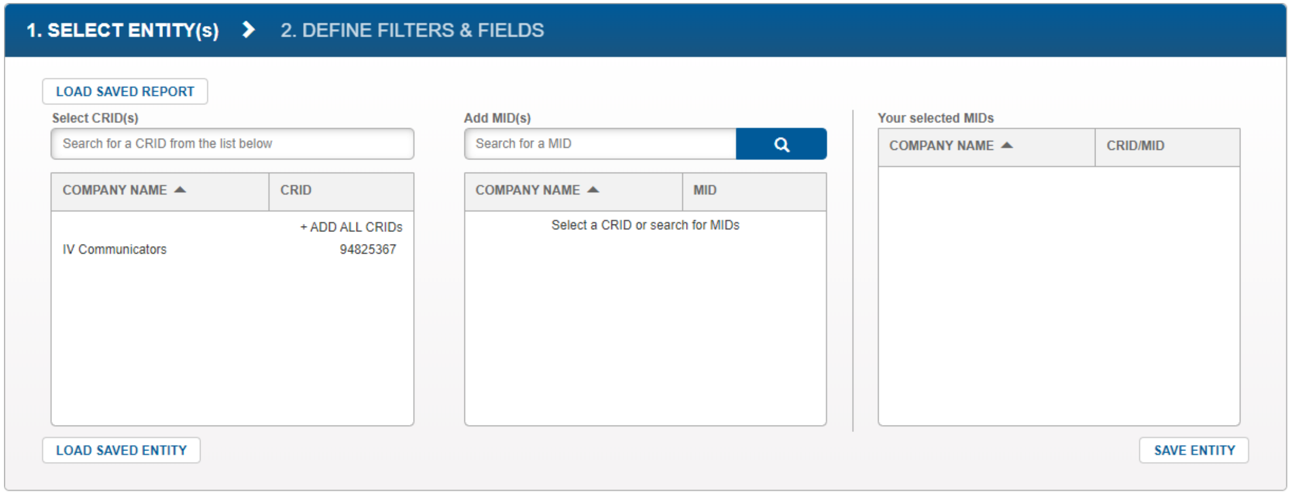
7. In the **Name This Feed** section, enter a name for the data feed. This is how your feed will display in the **Your Feeds** list.



8. Click **CONTINUE**.

Create a Data Feed: Select Entity(s)

- The **Select Entity** screen appears. This area allows you to choose what CRIDs/MIDs you will receive data for.



Note: You can choose entities that:

- You have access to (either by having the IV-MTR service for the entity in the BCG or by being delegated visibility of the entity), and
- You have visibility permissions for (managed using IV-MTR's Roles & Permissions feature)

By default, users always have visibility permissions for the entities they have access to in IV-MTR. If you have any questions about your visibility permissions, please see your BSA.

If you would like to download a list of your entities, please see the Data Availability slide.

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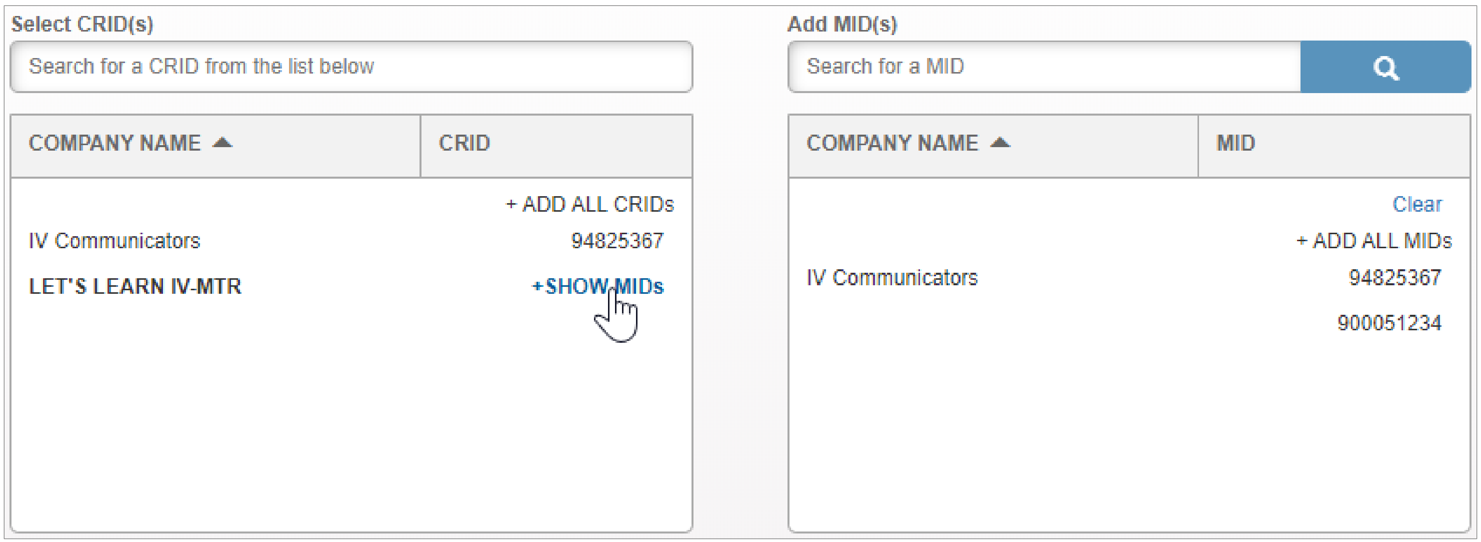
Select Entity(s): Choose a CRID

The **Select CRID(s)** pane lets you select the CRID(s) your MIDs belong to. You may add as many CRIDs as you like. Add CRID(s) using one of the following methods:

- **To add all CRIDs**: click **+ADD ALL CRIDS**
- **To add an individual CRID listed in the window**: Click the CRID entry
- **To add an individual CRID from a long list**: Use the Search dialog to display the CRID, then click the desired CRID

The CRID(s) move(s) to the **Add MIDs** pane. Repeat this step as necessary until all desired CRIDs have been added.



Once all desired CRIDs have been added, proceed to the next slide.

Select Entity(s): Choose a MID

- The **Add MID(s)** pane lets you select the MID(s) you want to include in the query. You may add as many MIDs as you like.
  - Your selections in this pane allow you to set the level of the query. Available options are:
    - **MID-level**: only provides data for the selected MID.
    - **CRID-level**: provides data for all MIDs belonging to the CRID.
  - By default, the Add MID(s) section does not display all of the MIDs for which you have visibility. MIDs are displayed if you selected CRIDs or if you use the MID search box.

Note: You can choose MIDs that:

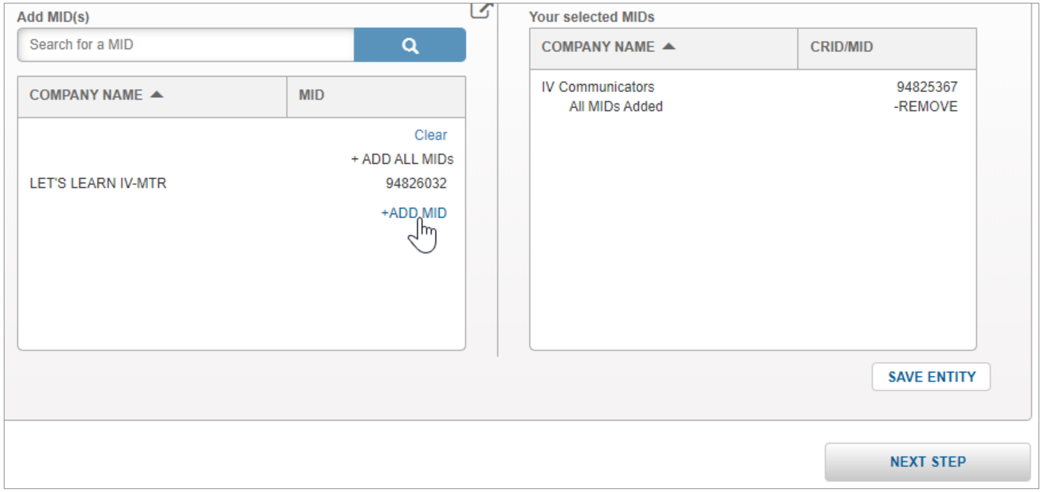
- You have access to (either by having the IV-MTR service for the MID in the BCG or by being delegated visibility of the MID), and
- You have visibility permissions for (managed using IV-MTR's Roles & Permissions feature)

By default, users always have visibility permissions for the MIDs they have access to in IV-MTR. If you have any questions about your visibility permissions, please see your BSA.

If you would like to download a list of your MIDs, please see the Data Availability slide.

Select Entity(s): Choose a MID

- Add MIDs using one of the following methods:
  - **To add an individual MID:** hover over the MID and click **+ADD MID**
    - Note: Creates a MID-level query.
  - **To add all MIDs for a CRID:** hover over the CRID and click **+ADD ALL**
    - Note: Creates a CRID-level query.
  - **To add all MIDs for all CRIDs at once:** click the **+ADD ALL MIDs** button in the top corner of the MID listing.
    - Note: Creates a CRID-level query for each CRID.
  - **To search for a MID:** Use the **Search** box, then add the MID(s) using one of the options described above.
    - You must enter at least three digits into the box in order to search.
- The MID(s) move(s) to the **Your Selected MIDs** pane.



- Repeat this step as necessary until all desired MIDs have been added, then click **NEXT STEP**.

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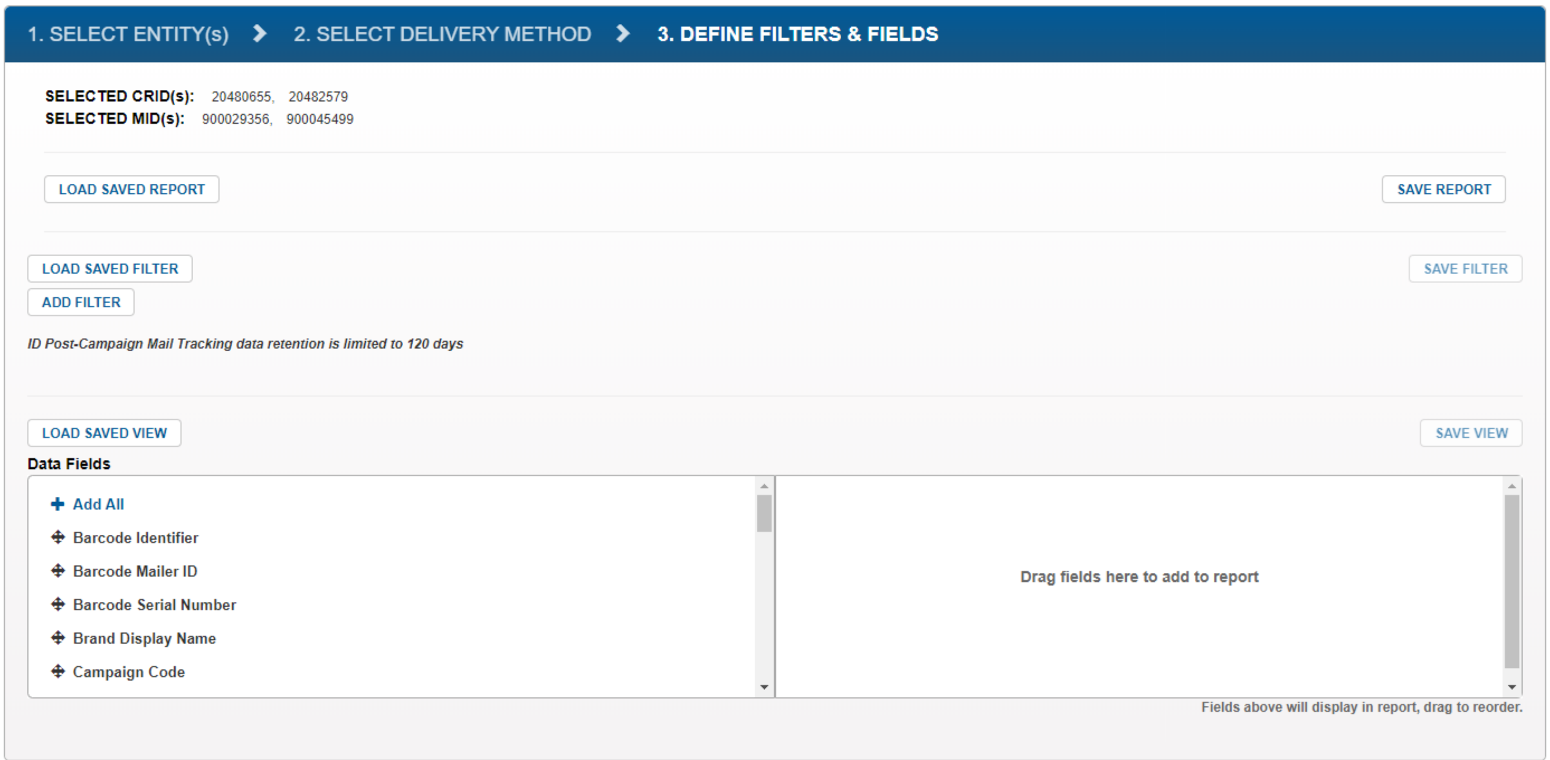
Create a Data Feed: Define Fields

The **Define Filters & Fields** screen appears. This screen allows you to choose the data filters and fields you are interested in.

- To add one or more filters (optional): click here
- To skip adding filters and begin selecting your data fields, click here.



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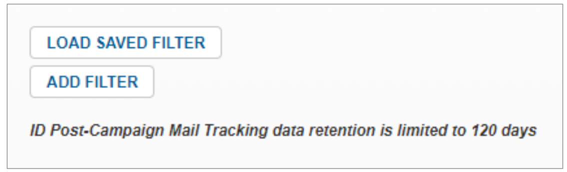
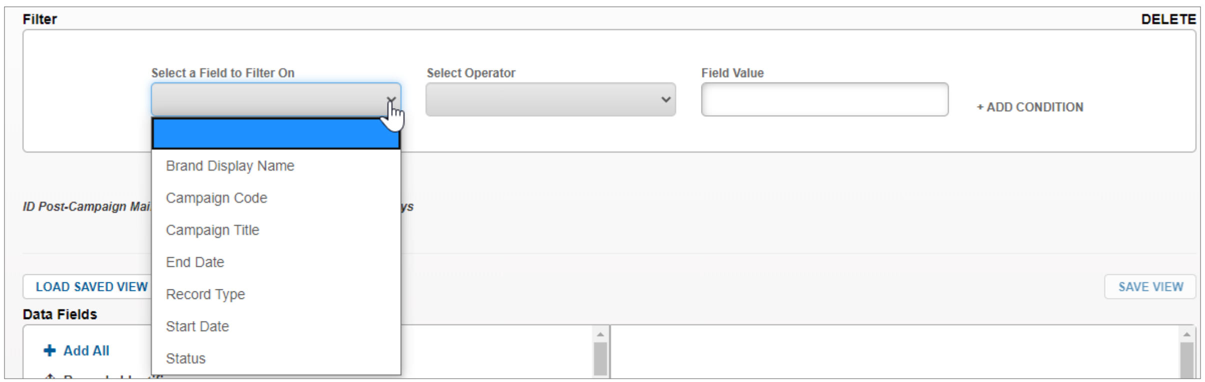
Define Filters & Fields: Adding Filters

To add a filter, follow these steps:

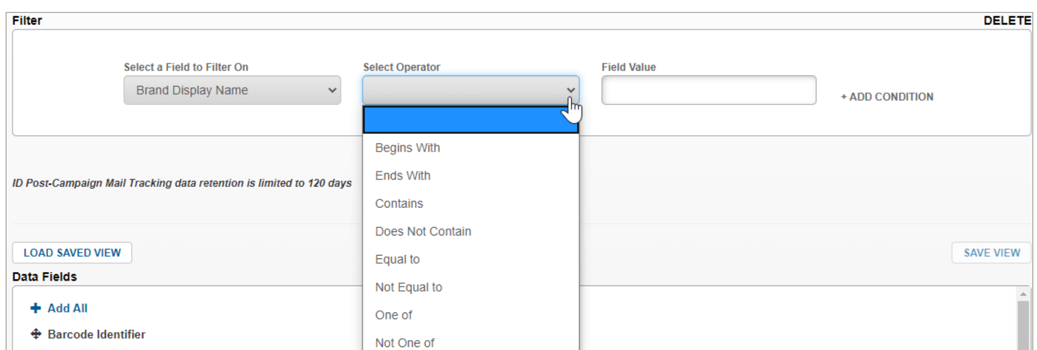
1. Click the **ADD FILTER** button.



2. The Filter section appears. In the **Select a Field to Filter On** dropdown menu, choose your desired filter.

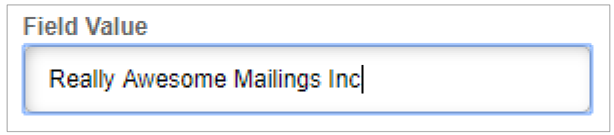


3. In the **Select Operator** dropdown, select the condition you would like to use.



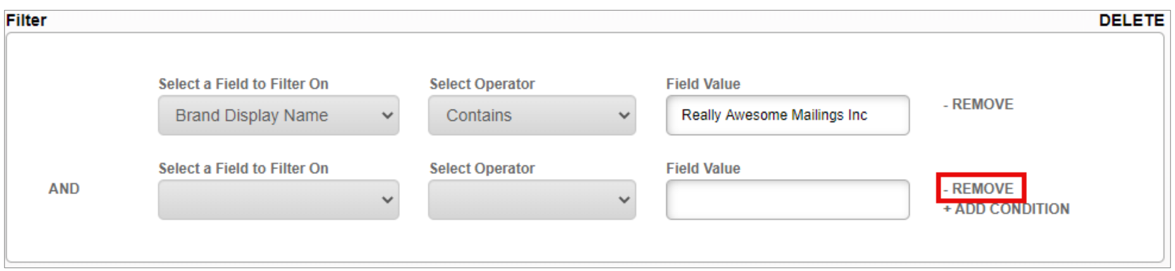
Define Filters & Fields: Adding Filters

4. In the **Field Value** area, enter the desired value.
   - If you chose *One of* or *Not One of* as the operator, you can enter multiple values. Separate values using commas without a space (e.g., 123456,123457,123458).

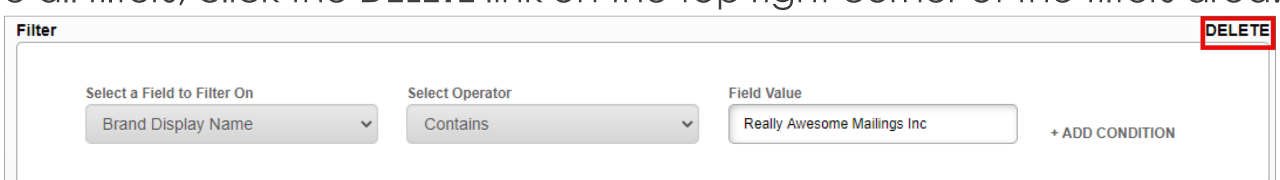


- To add additional filters, click the **+ ADD CONDITION** link to the far right of the existing filter. A new set of filter fields appears. Populate them using the steps for your existing filters.

- To remove one filter, click the **– REMOVE** link to the far right of the filter.



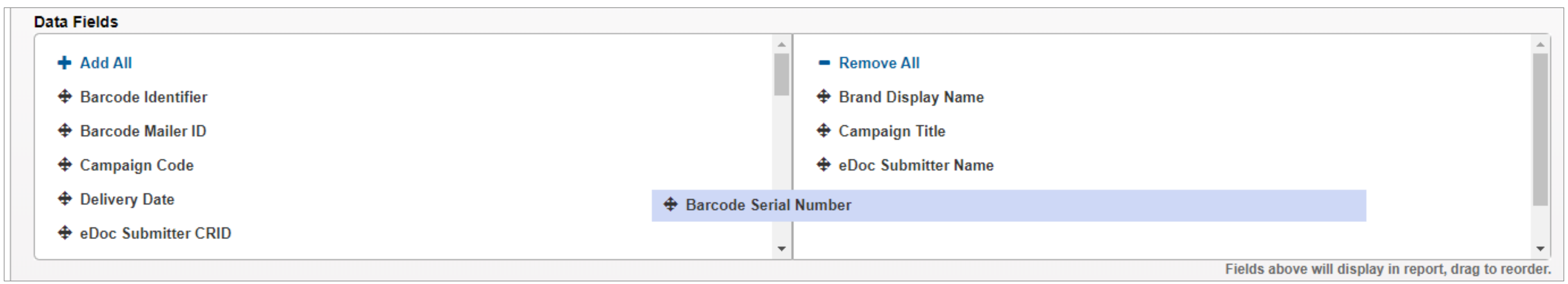
- To remove all filters, click the **DELETE** link on the top right corner of the filters area.



- When you have finished adding filters, proceed to the next slide.

Define Filters & Fields: Organizing Fields

- The **Data Fields** section allows you to choose the specific fields you receive in your results. You can also choose the order they appear in.
  - The fields on the left are available to be added, and the fields on the right are already included in your data feed.
  - **Drag** or **double-click** fields to move them from one side to the other. To add all available data fields, click **+ Add All.**
  - For details about the data fields themselves, please see the [IDPC Data Dictionary]().

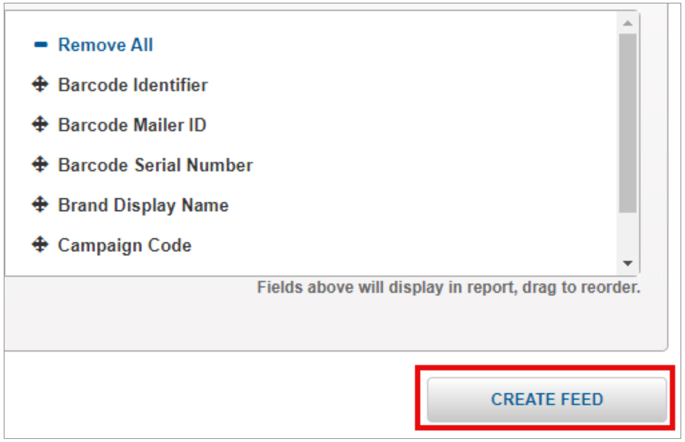


  - Once you have selected the data fields to be included, arrange them in your preferred order by dragging and dropping them on the right side of the Data Fields section.

Submitting Your Query

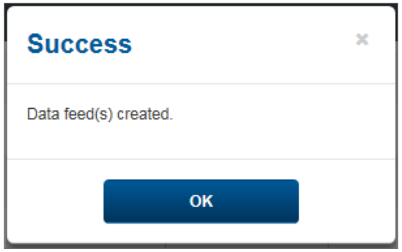
When you have finished organizing your fields and are ready to submit your query, follow these steps:

1. Click **CREATE FEED.**



Create a Data Feed: Define Fields

2. A pop-up appears confirming creation of the feed(s).



3. Close the window by clicking **OK** or the X icon.

Data feed creation is now complete. The new data feed(s) will appear in the Your Feeds table.

- For instructions on reviewing the feed's output files, see the next slide.
- For instructions on managing the data feed, including viewing and modifying its settings, see the Managing Existing Data Feeds section.

Retrieving Data

- Data feeds are activated upon creation and begin delivering data according to the selected start time and frequency.

- To retrieve files for a data feed, complete the following:
  - On the **Queries and Feeds** page, click **Create & Manage Data Feeds**.
  - On the **Create & Manage Data Feed** screen, locate the feed in the **Your Feeds** section.
  - Click the **Output History** icon for the feed.

Your Feeds

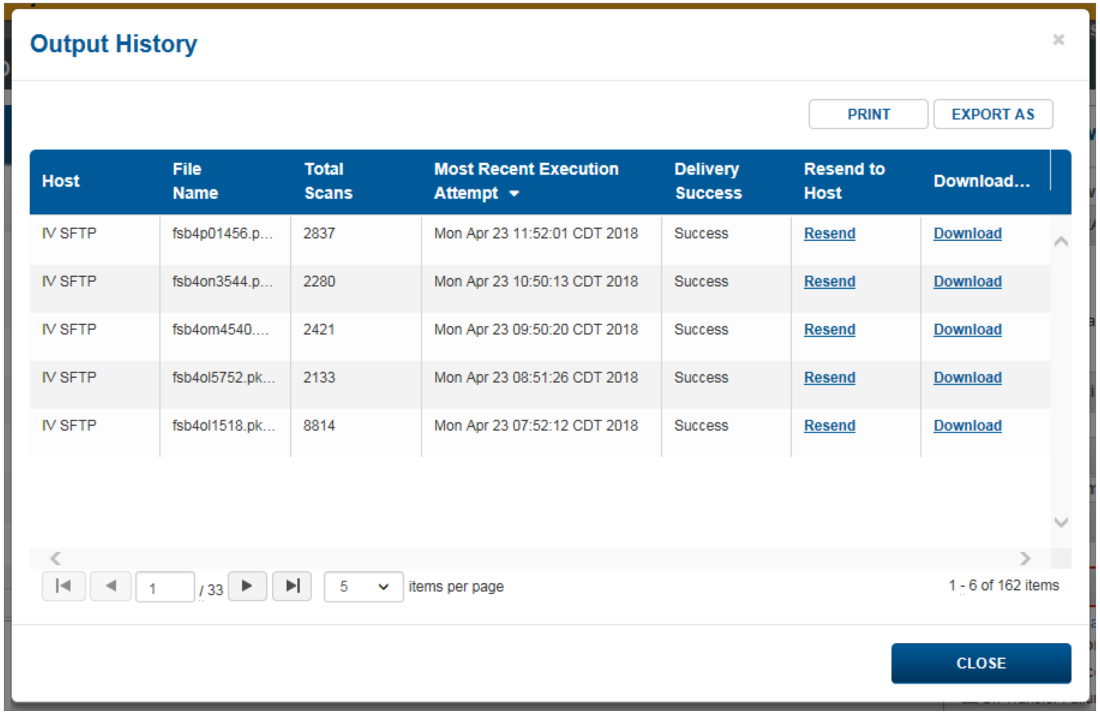
Search

Feed Name	Entity Name	Mail Object Type	Target	File Format	Frequency	Active	# of Failed Files	Output History	Details
Daily Scan Data		Piece	N/A	DELIMITE...	1 Day(s)	Active	-		
Example IDPC Data F...		Informed ...	N/A	DELIMITE...	4 Hour(s)	Active	-		
MQD 4 hrs_CRID 948...		Mail Qualit...	N/A	DELIMITE...	Daily	Active	-		
MQD 4 hrs_CRID 948...		Mail Qualit...	N/A	DELIMITE...	Daily	Active	-		
MQD 4 hrs_CRID 948...		Mail Qualit...	N/A	DELIMITE...	Daily	Active	-		
PPC_CRID94825367 ...		Package	N/A	DELIMITE...	4 Hour(s)	Active	-		

1 / 1 · 25 items per page · 1 - 9 of 9 items

Retrieving Data

- The **Output History** page for the feed will appear. The output files will appear, including:
  - Delivery information (including a status and link to resend if a server is being used)
  - Download link, which allows you to manually download and view individual files
  - Print dialog, which prints the Output History (but not the files themselves)
  - Export As menu, which exports the Output History (but not actual files) in Comma Separated Value (CSV) or Portable Data File (PDF) format



Host	File Name	Total Scans	Most Recent Execution Attempt	Delivery Success	Resend to Host	Download...
IV SFTP	fsb4p01456.p...	2837	Mon Apr 23 11:52:01 CDT 2018	Success	Resend	Download
IV SFTP	fsb4on3544.p...	2280	Mon Apr 23 10:50:13 CDT 2018	Success	Resend	Download
IV SFTP	fsb4om4540....	2421	Mon Apr 23 09:50:20 CDT 2018	Success	Resend	Download
IV SFTP	fsb4ol5752.pk...	2133	Mon Apr 23 08:51:26 CDT 2018	Success	Resend	Download
IV SFTP	fsb4ol1518.pk...	8814	Mon Apr 23 07:52:12 CDT 2018	Success	Resend	Download

Managing Existing Data Feeds

Reviewing, Modifying, Disabling, and Deleting

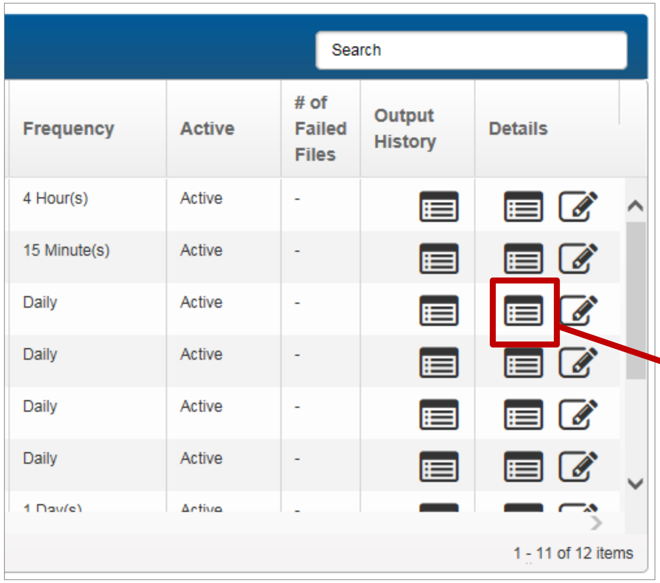
Use the table below to assist in managing existing data feeds.

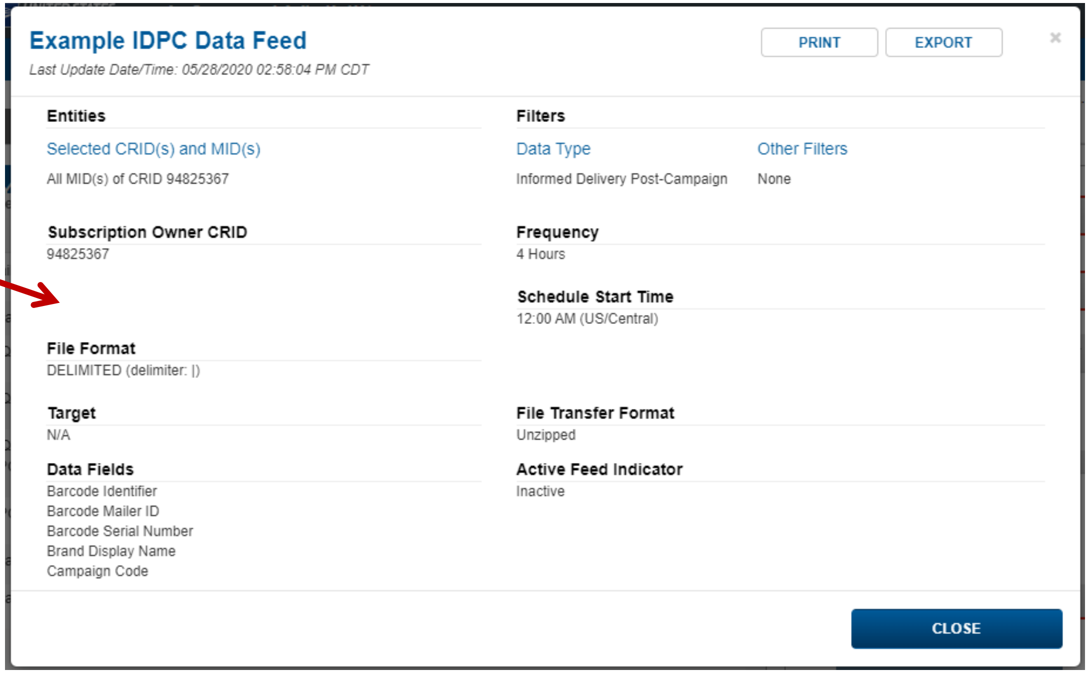
If you want to…	See…
View the details and settings of a data feed,	Reviewing a Data Feed
Modify an existing data feed,	Modifying a Data Feed
Temporarily turn off a data feed without permanently deleting it,	Disabling a Data Feed
Permanently delete a data feed,	Deleting a Data Feed
Troubleshoot an issue or question about IV-MTR,	Troubleshooting Resources

Reviewing a Data Feed

- To view the settings of a data feed, complete the following steps:

1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **View Details** icon.
3. The feed's **Details** page will appear, listing all the settings for the feed.

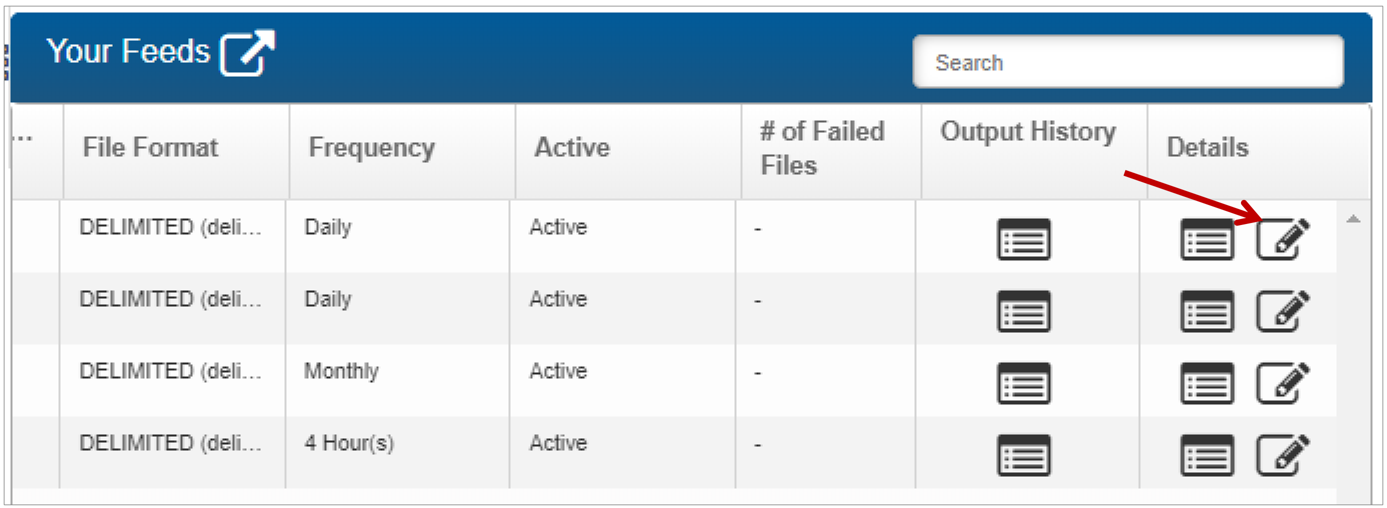




Modifying a Data Feed

To modify the settings of a data feed, complete the following steps:

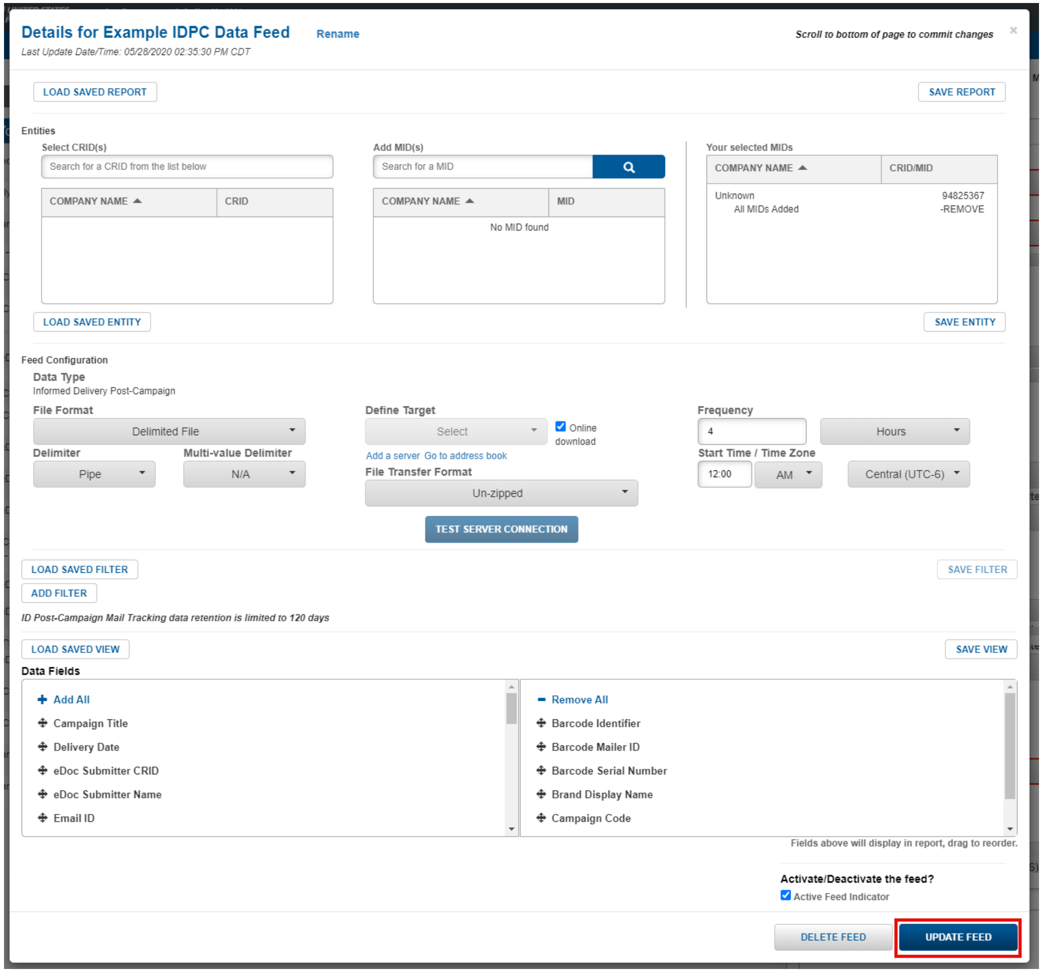
1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.



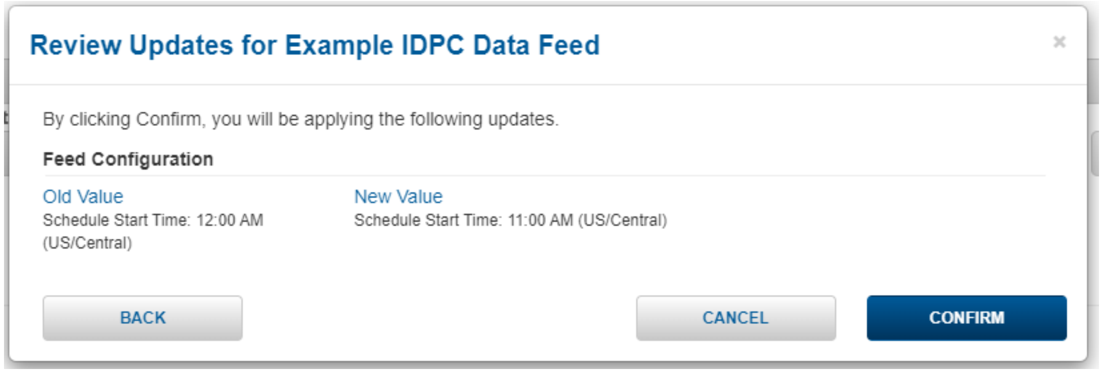
Modifying a Data Feed

3. The feed’s **Details** window appears. Make changes as needed.
4. Once your changes are complete, scroll to the bottom of the window and click **UPDATE FEED**.

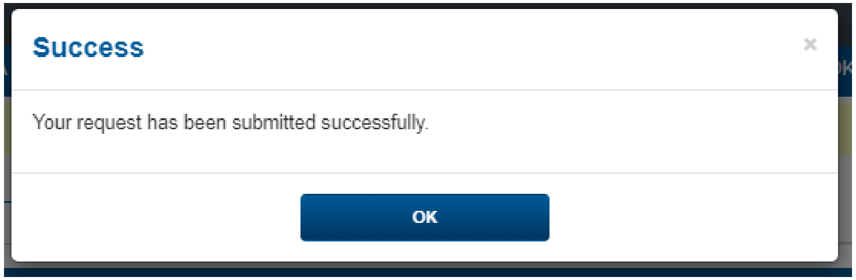
IMPORTANT: To save changes, you must click **UPDATE FEED**.



5. A **Review Updates** screen will appear, listing the changes made and asking you to confirm they are correct.
   - To accept the changes, click **CONFIRM**.
   - To make changes, click **BACK**.
   - To cancel the update altogether, click **CANCEL**.



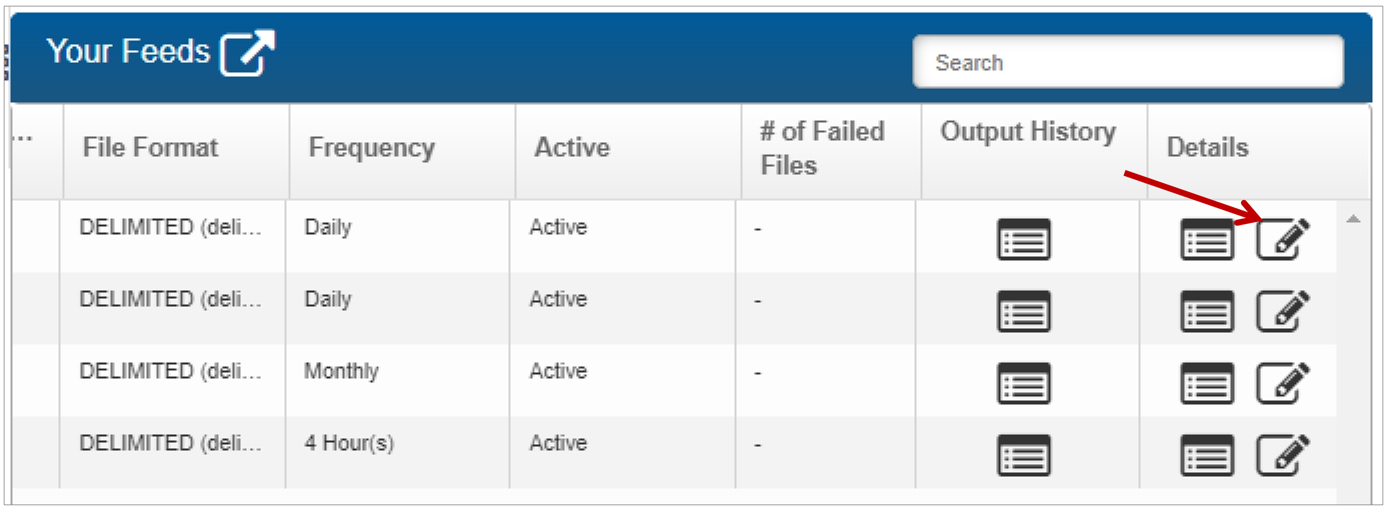
6. If you clicked Confirm, a success screen will appear, confirming the changes have been made. Click **OK.**



Disabling a Data Feed

- If you wish to temporarily turn off a data feed but do not want to permanently delete it, you can disable the data feed as follows:

1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.



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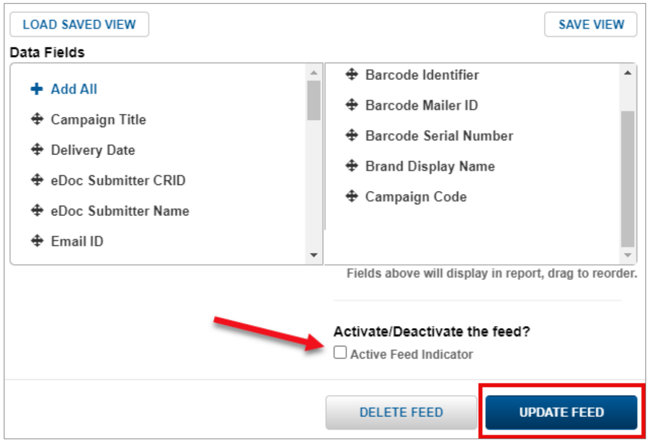
Disabling a Data Feed

3. The feed's **Details** window appears. Scroll to the **Active/Deactivate the feed** section at the bottom of the page and **uncheck** the **Active Feed Indicator** box.
4. Click **UPDATE FEED**.

IMPORTANT: To save changes, you must click **UPDATE FEED**.



5. A confirmation screen will appear, listing the deactivation. Click **CONFIRM**.

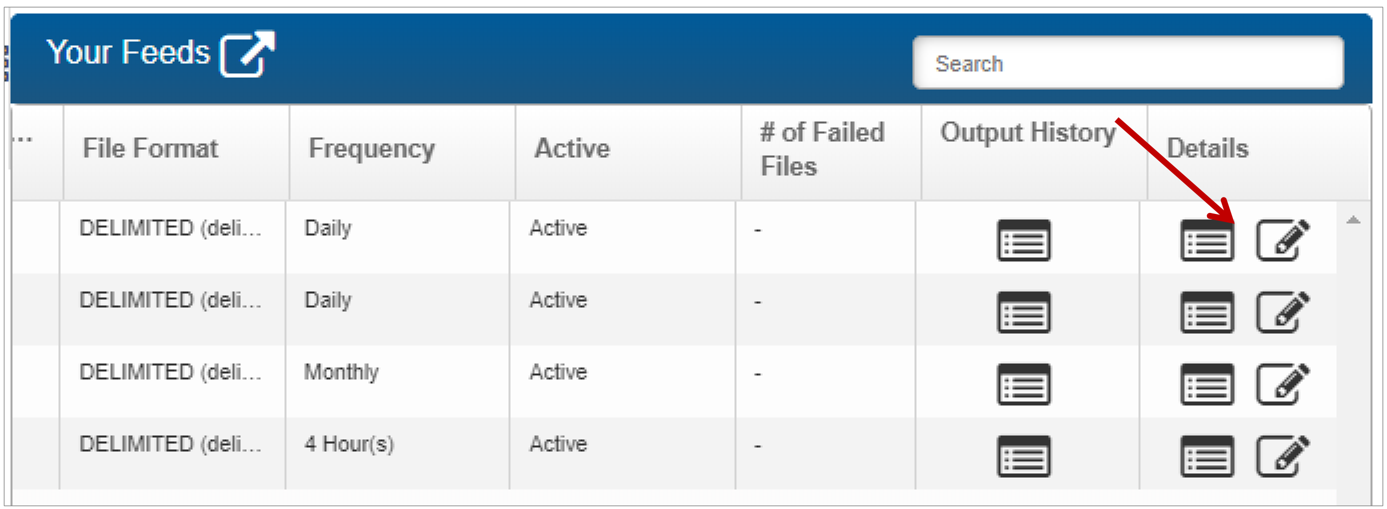
6. A success message will appear. On the **Create and Manage Data Feeds** screen, the feed will still be listed in the **Your Feeds** section, but new data will not be retrieved until the feed is re-activated.

Deleting a Data Feed

- Use the delete functionality when you want to permanently delete a data feed.

IMPORTANT: Data Feed deletion cannot be undone.

- To delete a data feed, complete the following:
  1. On the **Create & Manage Data Feeds** screen, locate the feed in the **Your Feeds** window.
  2. In the **Details** column, click the feed's **Modify** icon.



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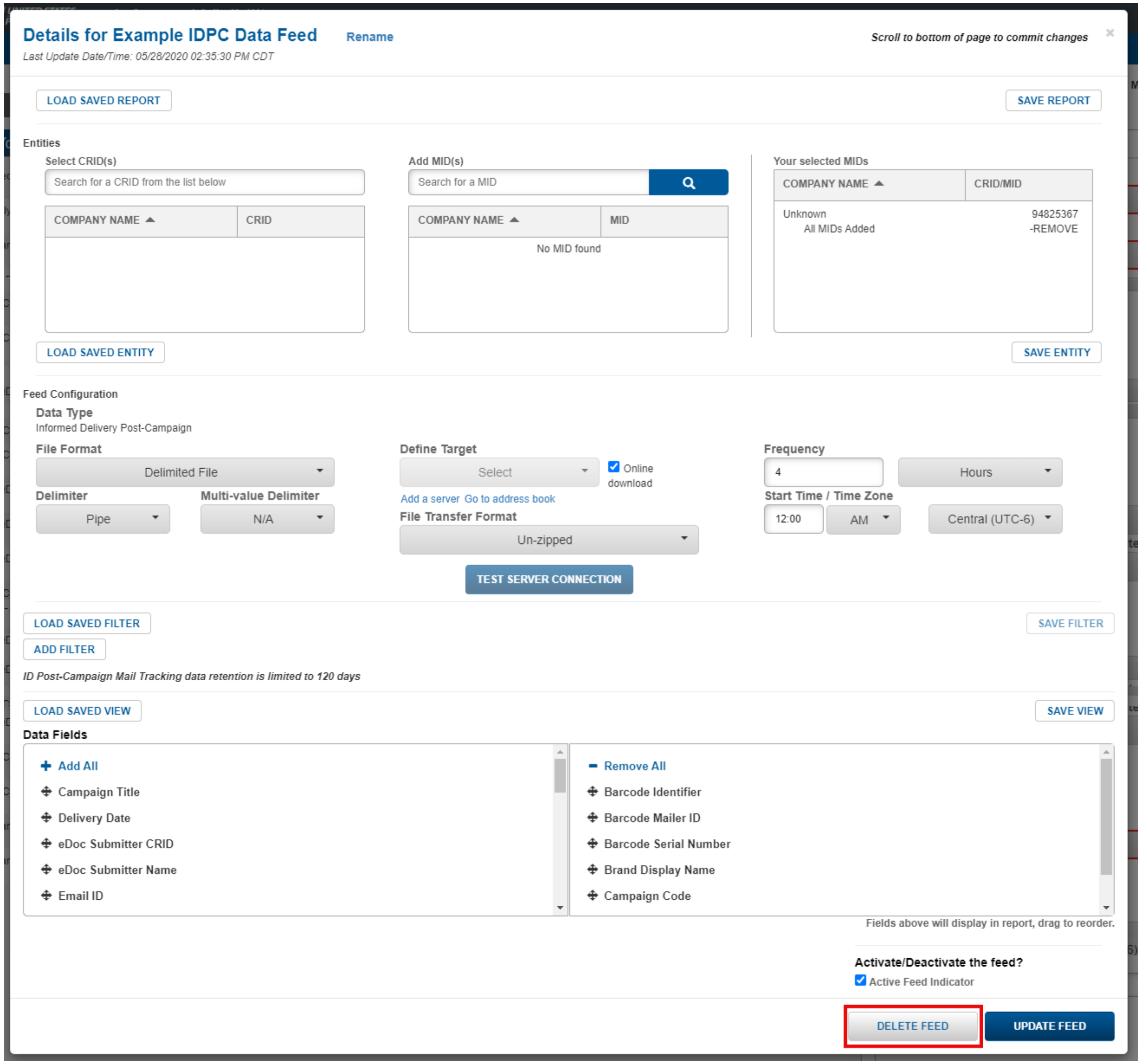
Deleting a Data Feed

3. The feed's **Details** window appears. Scroll to the bottom of the screen and click **DELETE FEED**.



Deleting a Data Feed

4. A **Confirm** popup will appear to confirm you want to delete the feed. Click **YES**.

5. The **Create & Manage Data Feeds** screen will appear. The feed will no longer be listed in the **Your Feeds** section.

Troubleshooting Resources

Where to Find Help When You Need It

Troubleshooting Resources

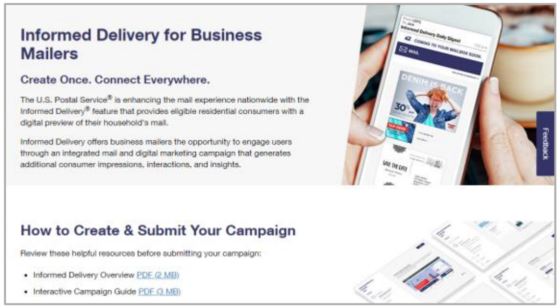
- This section provides resources for troubleshooting issues with Informed Delivery and IV data.

For help with…	See…
Informed Delivery Interactive Campaigns, including the Mailer Campaign Portal and the data received,	Informed Delivery Interactive Campaign Resources
IV-MTR, including accessing and using the application,	Informed Visibility Resources

Informed Delivery Campaign Resources

Informed Delivery Interactive Campaign help is available in two places:

1. [Informed Delivery for Business Mailers Page]() – a dedicated website with resources and documentation to support Informed Delivery interactive campaigns



2. Informed Delivery Interactive Campaigns Support – a dedicated group of Help Desk professionals who can assist with any interactive campaign questions

Informed Delivery for Business Mailers Page

The Informed Delivery for Business Mailers Page on usps.com provides a wealth of information about Informed Delivery interactive campaigns, including:

- Mailer Campaign Portal User Guide (in-depth information about signing up for the Mailer Campaign Portal and creating campaigns)
- Interactive Campaign Guide (in-depth information on the interactive campaign process and best practices)
- *PostalOne! Informed Delivery User Guide* (in depth information about creating a BCG account and setting up Mail.dat and Mail.XML for campaigns)
- IDPC Data Dictionary (detailed information about the actual data received)
- IDPC Sample Data Set (example data for each IDPC data field available in the IV-MTR application)

Industry members are also invited to join the Mailers' Technical Advisory Committee (MTAC) User Group 12 (forum for industry leaders and USPS representatives to discuss Informed Delivery)

- To join the email list, please email Michelle.N.Yarborough@usps.gov

Informed Delivery Interactive Campaign Support

- **The USPS Informed Delivery interactive campaigns support team is available to help answer any questions you have about Informed Delivery interactive campaigns and the Mailer Campaign Portal.**

USPSInformedDeliveryCampaigns@usps.gov

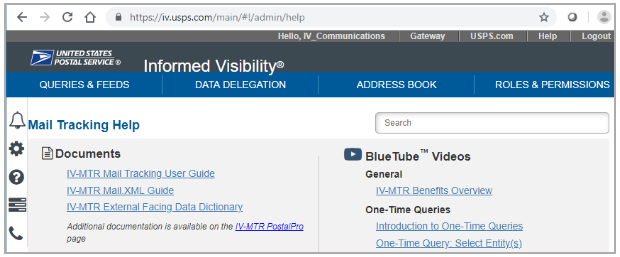
1-877-329-7206

7 AM to 5 PM CT, Monday through Friday

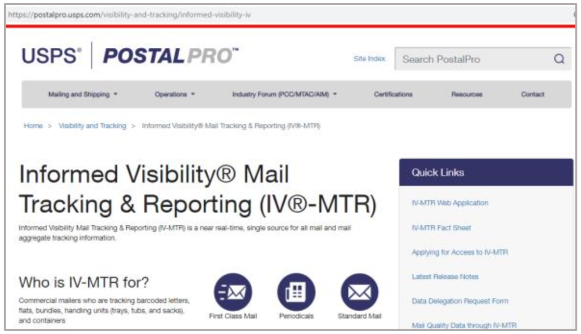
(closed weekends and federal holidays observed by USPS)

IV-MTR help is available in three places:

1. **IV-MTR Application** – the Help section of the IV-MTR website hosts the library of IV-MTR BlueTube® tutorial videos and provides links to select references on PostalPro



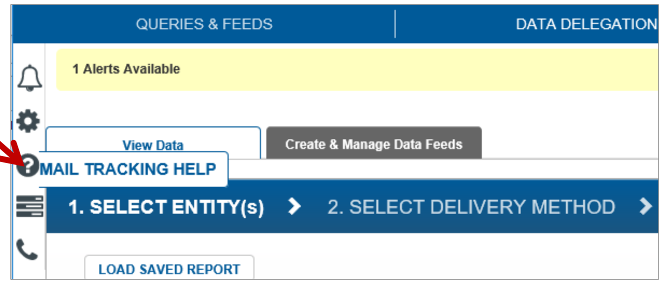
2. **PostalPro™ IV-MTR page** – a knowledge base with all IV-MTR documentation and resources



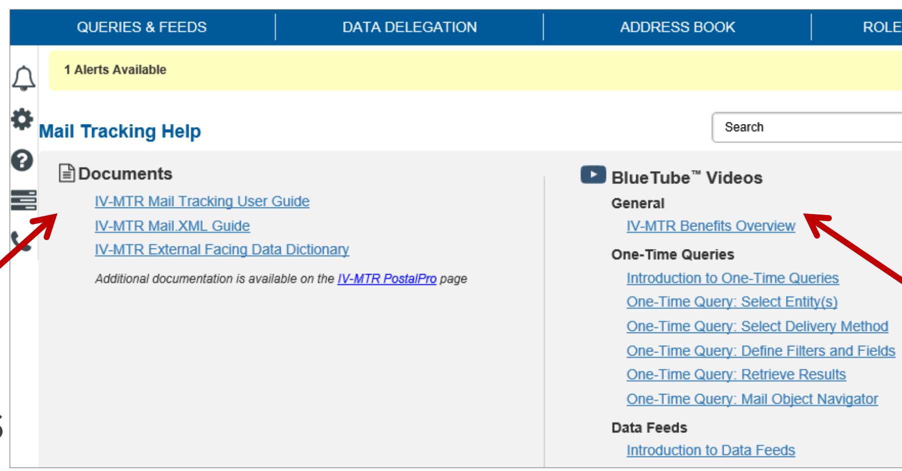
3. **IV Solutions Center® (IVSC)** – a dedicated group of Help Desk professionals who can assist with any questions

IV-MTR Help Page

- **Access the IV-MTR Help Page from within the IV-MTR application by clicking the Question Mark bubble in the Widget Sidebar.**



- The IV-MTR Help page hosts:



PostalPro Document links that give you direct access to select PostalPro resources

BlueTube tutorial videos that provide a library of step-by-step instructional videos that walk you through using IV-MTR

PostalPro™ IV-MTR Page

The IV-MTR PostalPro page provides a wealth of information about IV-MTR.

- **Specific resources for IDPC include:**
  - IDPC Data Dictionary (detailed information about the actual data received)
  - IDPC Data Delegation form (needed when coordinating data delegation with the IV Solutions Center)
  - IDPC One-Time Query form (needed when the IV Solutions Center completes a one-time query for you)
- **General resources for IV-MTR include:**
  - IV-MTR User Guide (the most in-depth information about IV-MTR)
  - Applying for Access (instructions for setting up a new IV-MTR account)
  - IV-MTR Orientation Training (introduction to the navigation and layout of the application)
  - Release Notes (information about the most recent updates)
  - MTAC User Group 4 materials (information about the open forum for USPS representatives and industry leaders to discuss mail visibility)

IV Solutions Center

- The IV Solutions Center is available to help answer any questions you have about IV-MTR.

InformedVisibility@usps.gov

1-800-238-3150, Option #2

7 AM to 5 PM CT, Monday through Friday

(closed weekends and federal holidays observed by USPS)

IV SOLUTIONS CENTER®

Appendix A

Change History

Date	Version	Description
6/17/2025	1.3	• Updated IV-MTR Landing Page image to show Reference Data section/link
12/14/2024	1.2	• Removed data feed retention-period note from the file Output History page.
11/13/2020	1.1	• Expanded data delegation appendix
6/20/2020	1.0	• Initial version

Acronyms & Abbreviations

Acronym / Abbreviation	Description
BCG	Business Customer Gateway
BSA	Business Service Administrator
CRID	Customer Registration ID
CSV	Comma Separated Value file
EPS	Enterprise Payment System
IDPC	Informed Delivery® Post-Campaign
IV®-MTR	Informed Visibility® Mail Tracking & Reporting
JSON	JavaScript Object Notation
LF	Line Feed
MCP	Mailer Campaign Portal
MID	Mailer ID
MQD	Mai Quality Data
MTAC	Mailers' Technical Advisory Committee
PDF	Portable Data File
PPC	Package Platform Concept
SFTP	Secure File Transfer Protocol
TXT	Text file
USPS®	United States Postal Service®

Appendix B

File Characteristics & Conventions

File Characteristics

File Type	Delimited	Delimited	JSON
Delivery Method	**Send to Server (SFTP)**	**Download (One-Time Query)**	**Send to Server (Web Service POST)**
File Extension	TXT	TXT	JSON
Compression	Option for zipped or unzipped	Always zipped	Option for zipped or unzipped
File Naming Convention	YYYYMMDDhhmmss_ID_CAMPAIGN_DETAIL_AAAA_BBBB.txt*	YYYYMMDDhhmmss_ID_CAMPAIGN_DETAIL_AAAA_BBBB.txt*	YYYYMMDDhhmmss_ID_CAMPAIGN_DETAIL_AAAA_BBBB.json*
Example File Name	20181207112728_ID_CAMPAIGN_DETAIL_2XY4_0001.txt	20181207112728_ID_CAMPAIGN_DETAIL_2XY4_0001.txt	20181207112728_ID_CAMPAIGN_DETAIL_2XY4_0001.json
Column Headers	Included	Included	N/A
Delimiter Character	Selected by user	Selected by user	N/A
End of Line Character	Line feed (LF) "\n"	Line feed (LF) "\n"	N/A
Escape Character	"\"	"\"	N/A
Handling of Large Number of Records	Multiple files created if more than 100,000 records within the send interval.	Multiple files created if more than 100,000 records within the send interval.	Multiple messages/files created if more than 100,000 records within the send interval.
In-App Notification When Ready	Not available	Available	Not available
Displayed in Output History	Yes	Yes	Yes
Behavior if No Records	Blank file sent and appears in Output History	Blank file appears in Output History	No file will be sent and no blank file appears in Output History

** See the next slide for additional details.*

File Naming Convention

- **File name:** YYYYMMDDhhmmss_ID_CAMPAIGN_DETAIL_AAAA_BBBB.[extension]*

- **Where:**
  - YYYY = year
  - MM = month
  - DD = day
  - hh = hour
  - mm = minutes
  - ss = seconds
  - AAAA = alphanumeric characters representing the message ID (e.g., A2WU)
  - BBBB = file number in batch (e.g., 0001 for File #1, containing up to 100,000 records. If there are more records, the next 100,000 are in File #2 named 0002, etc.)

Appendix C

Adding Servers to the Address Book

Adding Servers to the Address Book

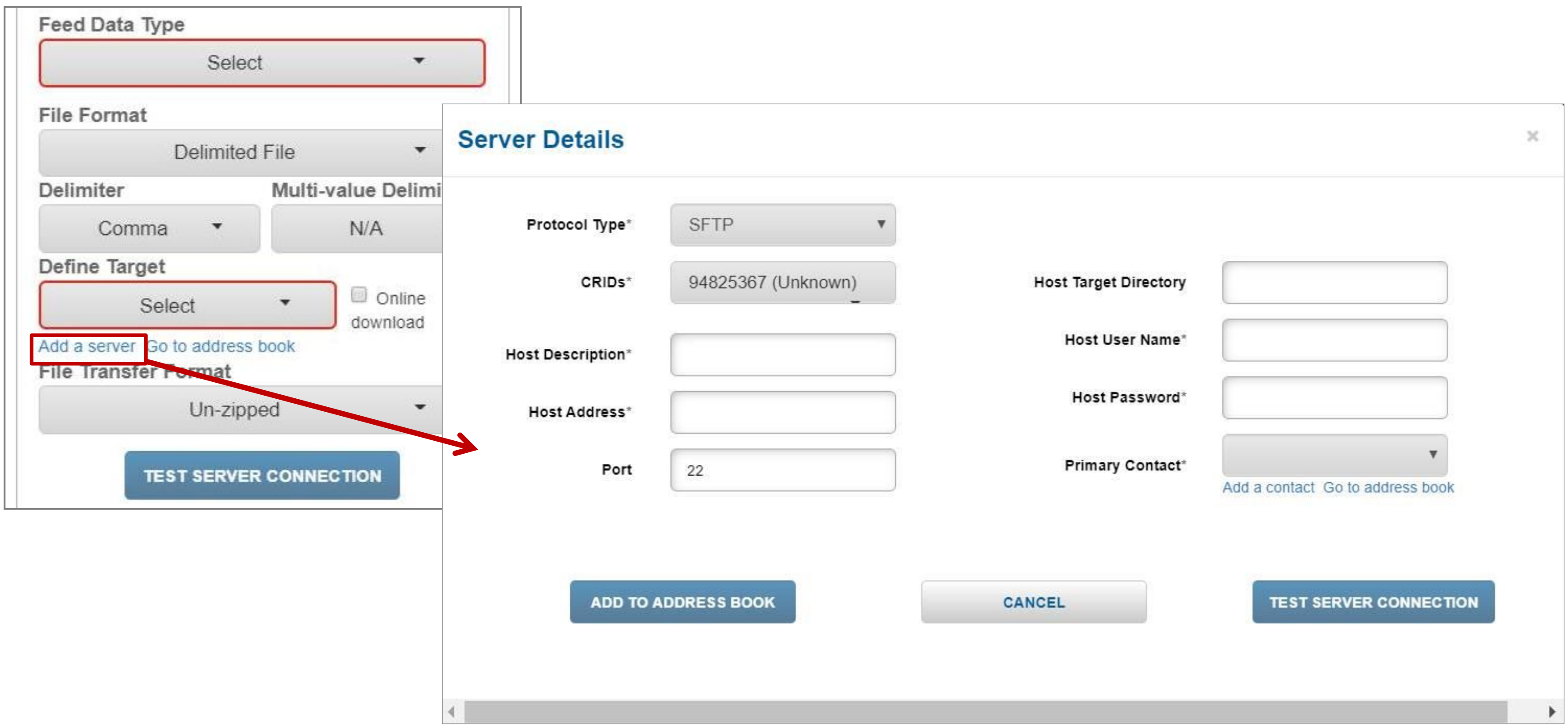
- To send data to a server or web service, it must be added to the IV-MTR address book. You can add a server before or while creating a query or data feed.

For instructions on adding a server…	See…
While you are creating a query/feed,	Adding a Server during Feed Setup
Before you begin creating a query/feed,	Adding a Server before Feed Setup

- If you would like more information about the IV-MTR Address Book, please see the **IV-MTR User Guide**.

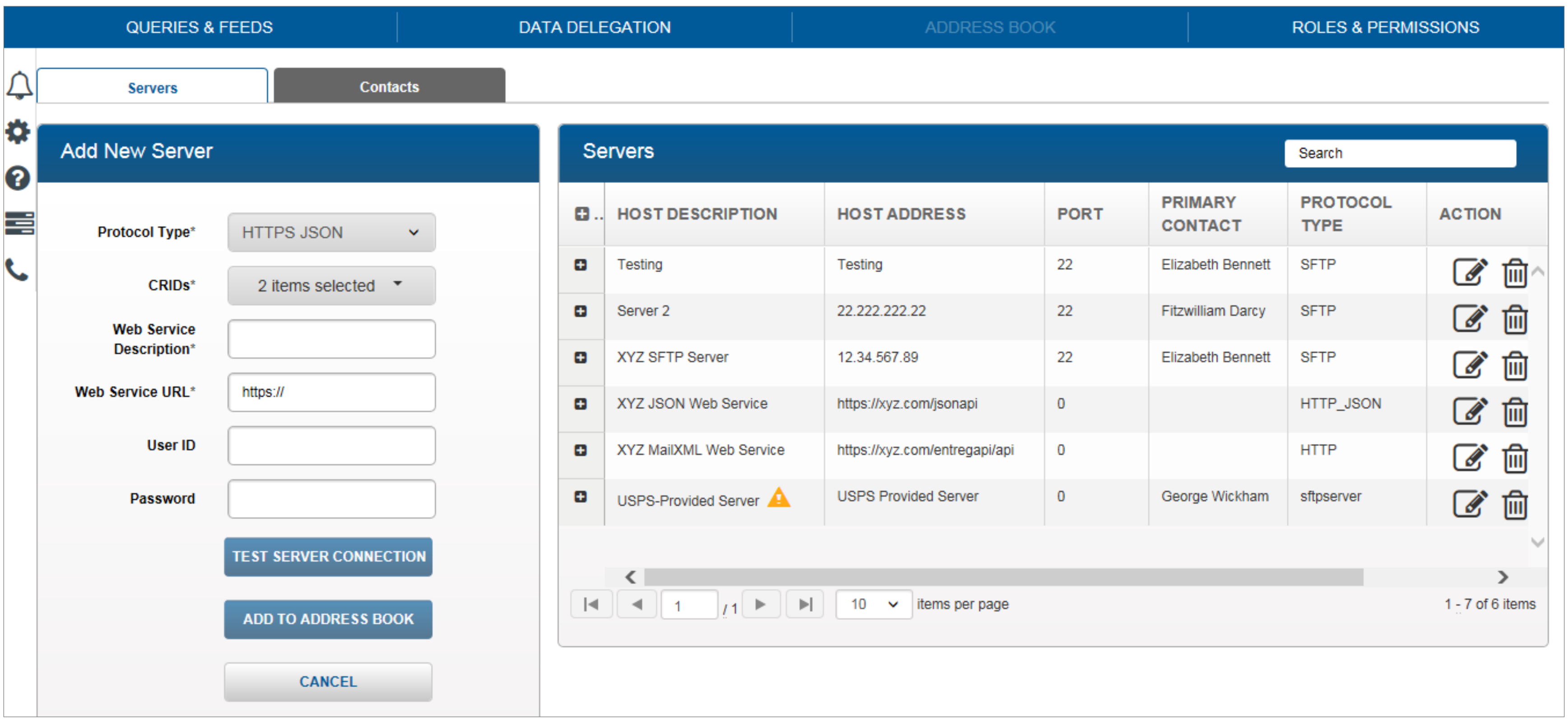
Adding a Server during Query/Feed Setup

- To add a server or web service *while creating* a query/data feed, under the **Define Target** drop-down, click **Add a Server**. A window opens for you to enter the server details.
- Select the **Protocol Type** and complete the remaining fields. When you are finished, click **ADD TO ADDRESS BOOK**. The new server or web service is added to your address book and is now available from the **Define Target** menu. Continue with the one-time query or data feed setup instructions.



Adding a Server before Feed Setup

- To add a server or web service *before* creating a query/data feed, go to **Address Book** > **Servers.** On the left side of the screen, select the **Protocol Type** and complete the remaining fields. When you are finished, click **ADD TO ADDRESS BOOK**. The new server or web service is added to your address book and is now available from the **Define Target** menu when you create a query/data feed.

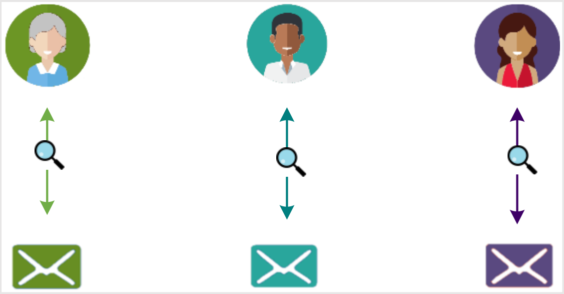


Appendix D

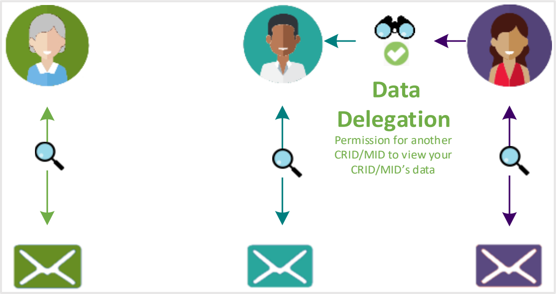
Data Delegation Overview

Data Delegation is a feature of IV-MTR that allows you to share and receive data with other CRIDs/MIDs and organizations.

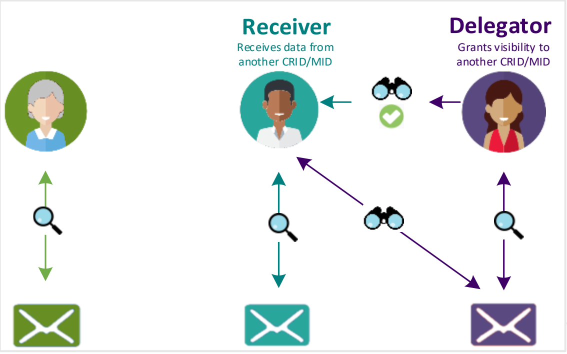
- In IV-MTR, each CRID has visibility of its own data.



- If you'd like to share data with another CRID, you can do so by creating a *data delegation*.



- The data delegation allows the receiving CRID to create data feeds with your data.



What is Data Delegation?

There are two roles in data delegation:

1. **Delegator:** The CRID that shares its data with another CRID or MID.
2. **Receiver:** The CRID that receives data from another CRID or MID.

Data Delegation can be initiated by either a delegator or a receiver.

- Instructions for both methods are provided in this section.

Data can be shared either between CRIDs/MIDs owned by the same organization (as a means of centralizing data), or between organizations (such as a Mail Owner and a Mail Service Provider).

If you have any questions about whether data delegation is right for you, please contact the IV Solutions Center.

How Data Is Shared

Data Delegation in IV-MTR hinges on the following:

1. **Level of Delegation –** IDPC data can be delegated at the CRID or MID-level.
   - CRID-level delegations provide visibility of all MIDs – current ***and future*** – for a particular CRID.
   - MID-level delegations only provide visibility of the selected MID

2. **Data Type Shared –** New data delegations must be created for each data type.
   - This ensures the CRID/MID owner can control what data recipients are allowed to receive.
   - Having a delegation in place for one data type does not affect visibility of any other data types. There is no option for a blanket delegation of all data types.

How Data Is Shared (continued)

Data Delegation in IV-MTR hinges on the following:

3. **Discretion of Delegator –** Delegating CRIDs have final say on what visibility is shared.
   - Receivers can request the data and dates they prefer, but the delegator can modify any delegation at any time.
     - Receivers can be notified about modifications made to data delegated to them. See the IV-MTR User Guide, section 12.4: Managing Notification Preferences.
   - If a new data type becomes available, the receiving party will need to submit a new data delegation form to receive that data type.

4. **Manual Updating of Feeds/Reports with Delegated Data –** Delegated data is not automatically added to existing data feeds or saved reports.
   - After the receiver is granted visibility, they must update any existing data feeds or reports or create new feeds/saved reports manually.
   - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the receiver requested visibility of).

Delegation Setup Options

The IV-MTR application provides **a self-service data delegation area** that allows organizations with IV-MTR accounts to **share data without having to contact the Postal Service**.

- Instructions for doing this are provided in this section.
- Only BSAs, BSA Delegates, or Data Delegation Managers can set up delegations.

However, if one or both of the organizations **do not have access** to IV-MTR or **do not wish to set the delegation up** themselves, the **IV Solutions Center** can help facilitate the delegation.

- Please contact the IV Solutions Center for more information.

This appendix provides the essential instructions for setting up IDPC-specific delegations.

- If you need more detailed information about Data Delegations at any time, see the IV-MTR User Guide.

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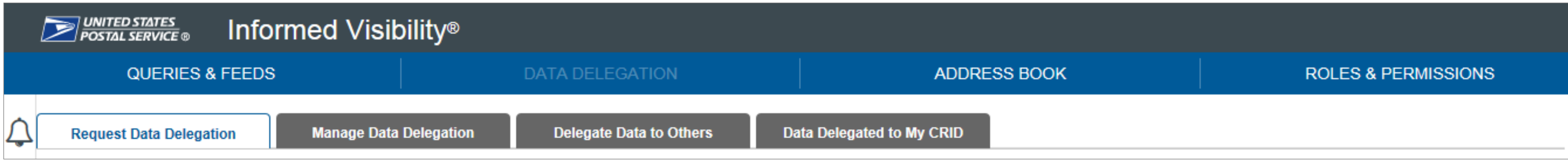
Data Delegation Area

There are four tabs within the **Data Delegation** area of IV-MTR:



1. **Request Data Delegation:** Allows you to **request visibility from another CRID**, view the history of your requests, and cancel pending requests.
   - Some functionality on this tab is restricted by user level.
2. **Manage Data Delegation:** Allows you to **view the requests** you have received from other CRIDs for visibility of your data **and approve or deny them.** Also allows you to **view the full history of data delegations** for your CRID's data, including those created by your CRID's users, and **modify or delete** them as necessary.
   - This tab is restricted by user level (general users cannot view).
3. **Delegate Data to Others:** Allows you to **delegate visibility** of your data **to another CRID.**
   - This tab is restricted by user level (general users cannot view).
4. **Data Delegated to My CRID:** Allows you to **see the data currently delegated to your CRID** and **delete** any unwanted delegations.
   - Some functionality on this tab is restricted by user level.

To delegate or request IDPC data, you will need the following:

- A BSA, BSA Delegate, or Data Delegation Manager user role
- Delegating CRID(s)
- Receiving CRID(s)
- Dates data will be shared
- IV-MTR service for your CRID

Use the table below to proceed.

If you want to…	Proceed to…
Request data from another CRID/MID,	Requesting Data Delegation
View data currently delegated to you,	Viewing Data Delegated to You
Delete data currently delegated to you,	Deleting Data Delegated to You
Delegate data to another CRID/MID,	Delegating Data to Others
Review delegation requests you've received,	Reviewing Data Delegation Requests
Modify or delete data you are currently delegating,	Modifying Existing Delegations

UNITED STATES POSTAL SERVICE ®

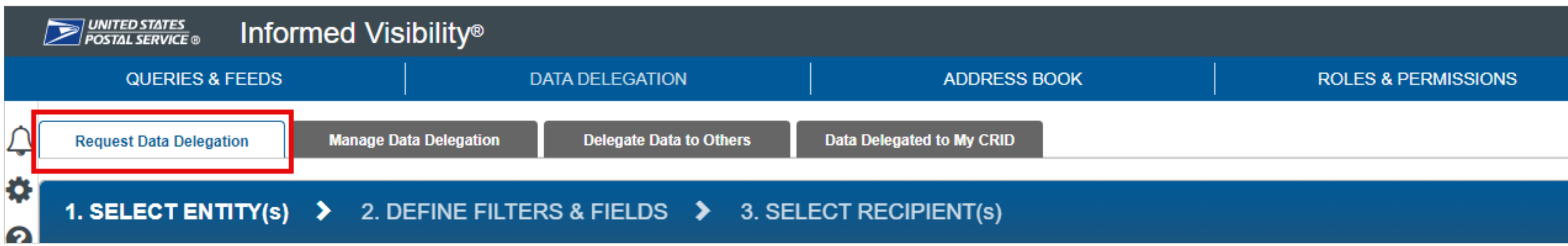
Requesting Data Delegation

(BSA, BSA Delegate, and Data Delegation Managers Only)

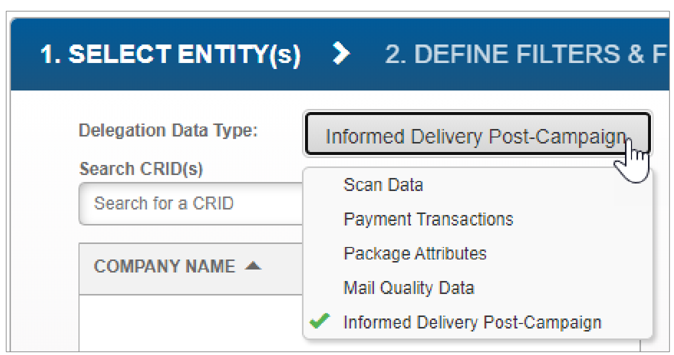
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Follow these steps to request data delegation:

1. Log into IV-MTR and click the **Data Delegation** tab.
2. The Data Delegation area will appear, set to the **Request Data Delegation** tab.

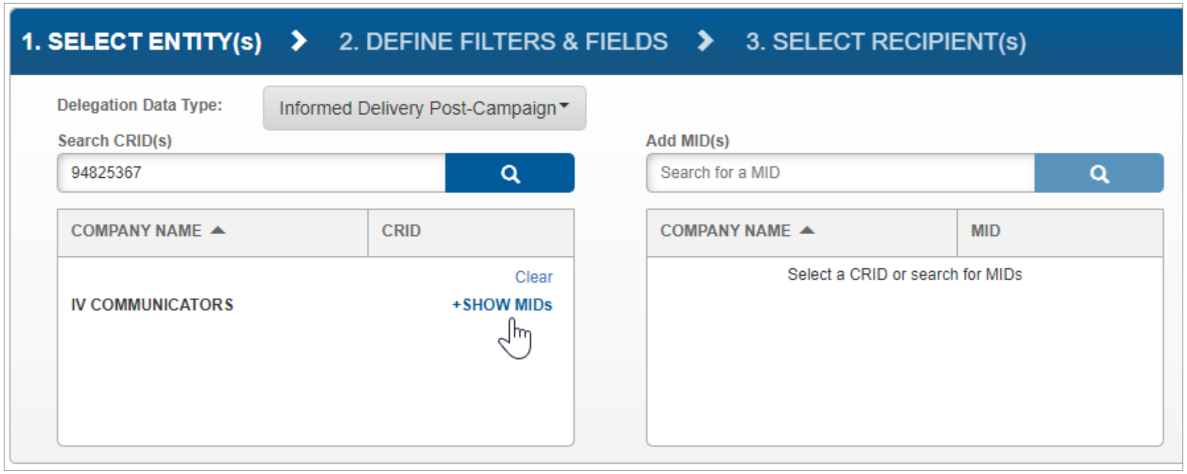


3. In the **Delegation Data Type** dropdown, select **Informed Delivery Post-Campaign**.

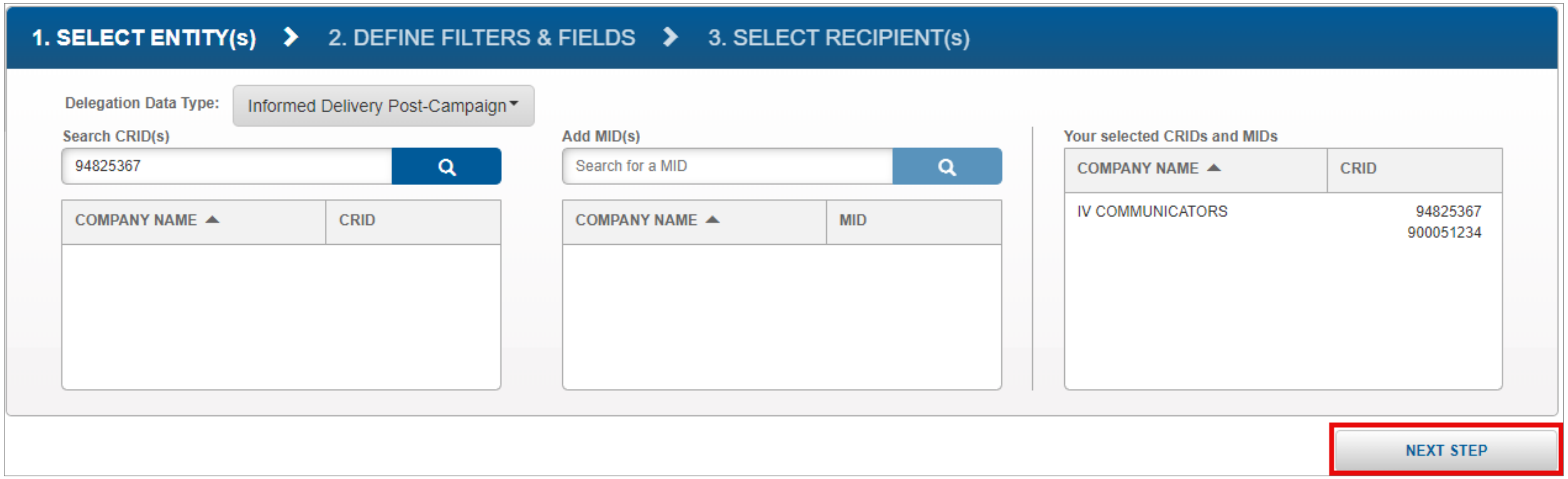


Requesting Data Delegation

4. Use the **Search CRIDs** and **Add MID(s)** panes to locate and add the CRIDs and MIDs you would like visibility for. For best results, use the full CRID.
    - Selected CRIDs and MIDs will move to the Your selected CRIDs and MIDs pane.

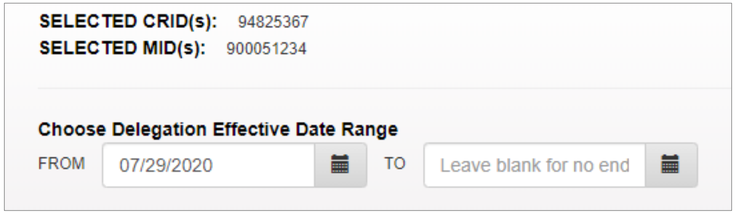


5. When you have finished adding CRIDs and MIDs, click **NEXT STEP**.

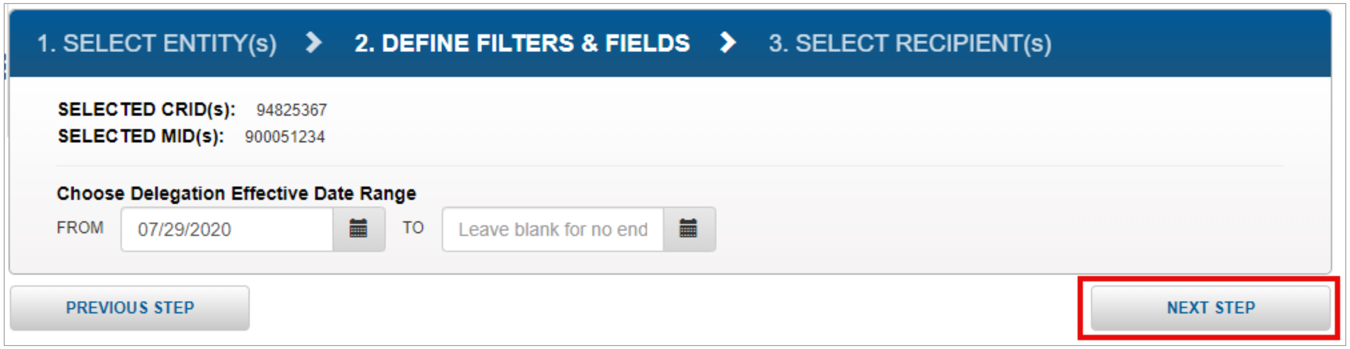


Requesting Data Delegation

6. The Define Filters & Fields screen will appear. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
    - You cannot select dates in the past.
    - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the you request visibility for).

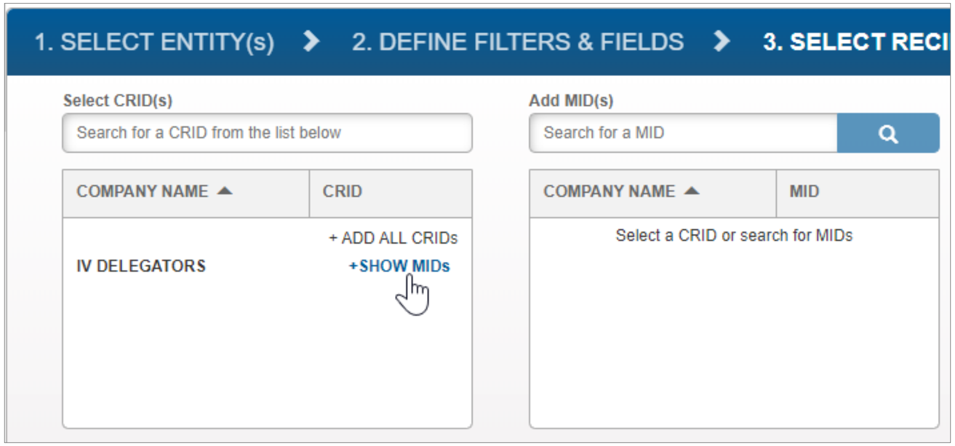


7. When you have chosen your dates, click **NEXT STEP**.

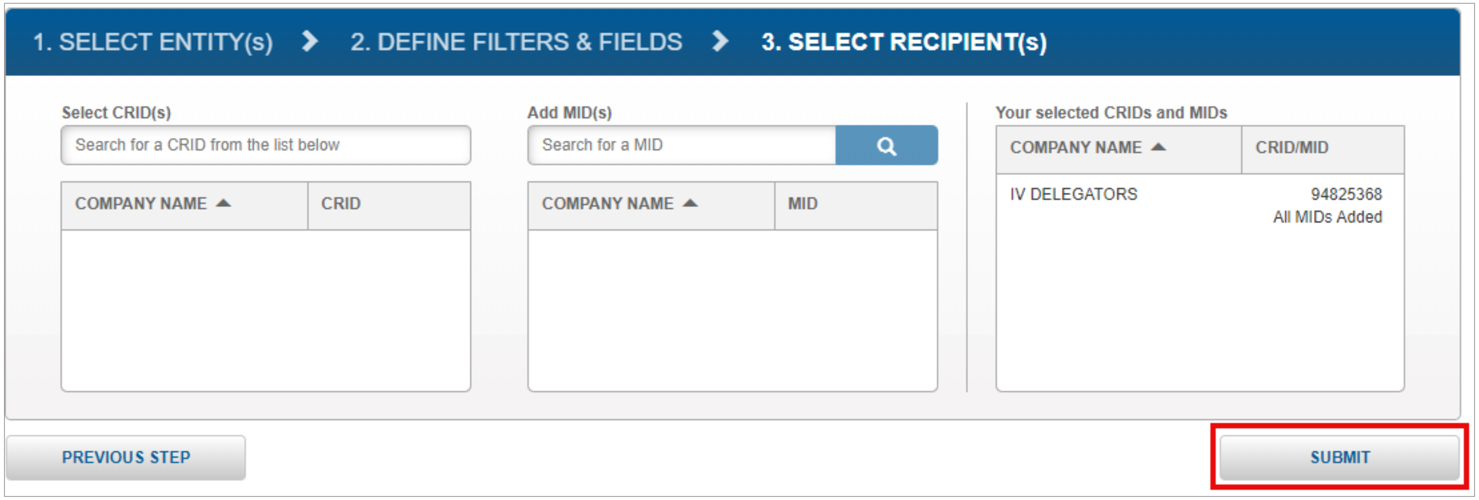


Requesting Data Delegation

8. The Select Recipient(s) screen will appear. Use the **Select CRID(s)** and **Add MID(s)** panes to select the CRIDs and MIDs that will receive the data. Selected CRIDs and MIDs will move to the Your selected CRIDs and MIDs pane.

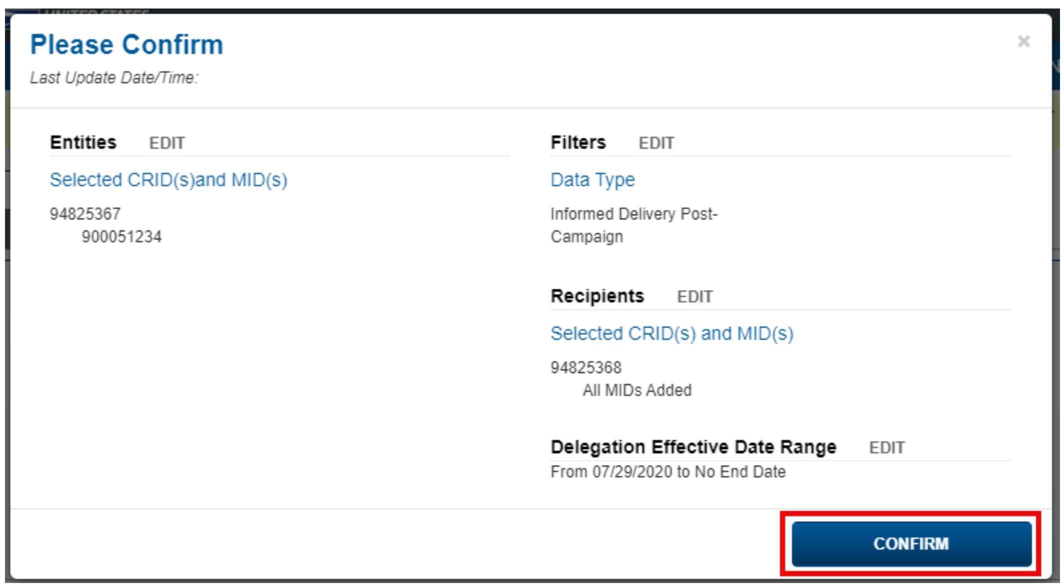


9. When you have finished selecting your CRIDs and MIDs, click **SUBMIT**.

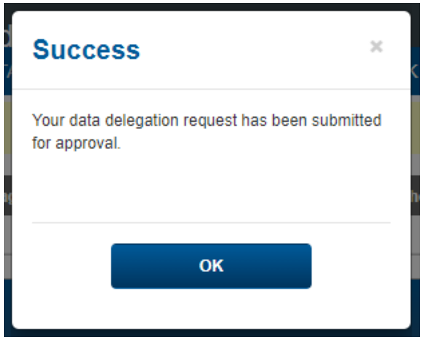


10. A confirmation screen will appear. Review the details of your request.
    - **If you need to make changes,** click the **EDIT** link next to the section that needs updates.

- **If your request is ready to submit,** click **CONFIRM**.



11. A popup will appear, confirming your request has been submitted. Users of both the receiving and delegating CRIDs will be notified of the request according to their notification settings.



12. Your data delegation request is now complete and with the delegators for review.
    - **If you would like to review the status of your request,** see the next slide.
    - **If your request is approved and you would like to begin using the data:**
        - Add the delegated CRIDs to a one-time query (instructions here) or your existing data feeds (instructions here).
        - Create a new IDPC data feed using the instructions here.

Data Delegation Request Status

- **The Request History table lists all the delegation requests submitted by your CRID(s)/MID(s) and their statuses.**
- In this table, you can:
  - **Determine a request's status** by locating its entry in the STATUS column
    - Note: If your delegation is marked as Pending for an extended period of time, contact the delegator or reach out to the IV Solutions Center for assistance.
  - **Review the details** of a request by clicking its Details icon.
  - **Cancel a request** by clicking its Delete icon.
    - **Note: Delegation requests cannot be modified** after they have been submitted. If you need to change something in a request, you must cancel the request and create a new one.

Request History

Search for CRID or MID

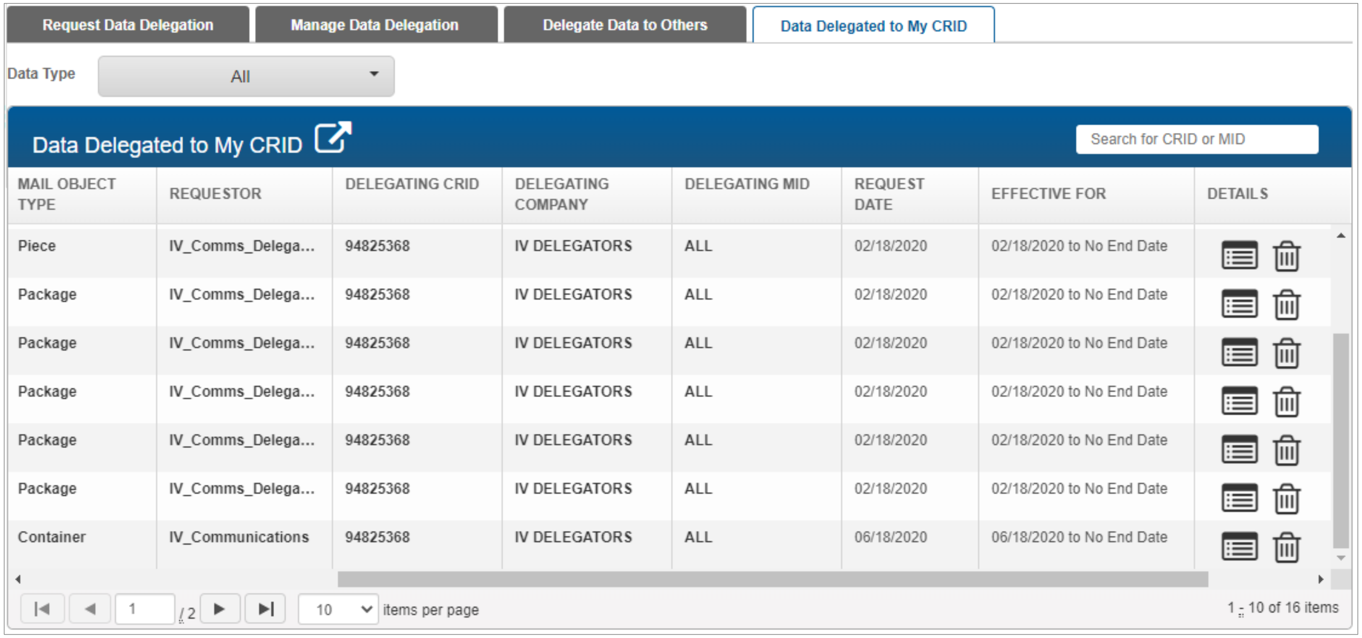
RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	07/28/2020	07/28/202...	Request Pending	
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	07/28/2020	07/28/202...	Request Pending	
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	02/18/2020	02/18/202...	Request Cancel...	
94825367	IV Commu...	ALL	Container	IV_Commun...	94825368	IV DELEGAT...	ALL	06/22/2020	06/22/202...	Request Rejected	
94825367	IV Commu...	ALL	Bundle	IV_Commun...	94825368	IV DELEGAT...	ALL	06/22/2020	06/22/202...	Request Rejected	
94825367	IV Commu...	ALL	Handlin...	IV_Comms_...	94825368	IV DELEGAT...	ALL	02/18/2020	02/18/202...	Request Rejected	
94825367	IV Commu...	ALL	Mail Qu...	IV_Comms_...	94825368	IV DELEGAT...	ALL	12/05/2019	12/05/201...	Request Appro...	

1 / 3   10 items per page   1 - 10 of 23 items

Viewing Data Delegated to You

Viewing Data Delegated to You

- Follow these steps to view the data other CRIDs are sharing with you:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Data Delegated to My CRID**.
  3. The Data Delegated to My CRID screen appears, with a table listing all active delegations.
- The **Data Type** drop down allows you to filter delegations records by data type.
  - **Note: If you have over 50,000 records,** you will be required to choose a data type from the menu before records will display.
- The Export icon allows you to download a list of all delegations.
- The Details icon allows you to view the details of each delegation.



MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	

Deleting Data Delegated to You

(BSA, BSA Delegate, and Data Delegation Managers Only)

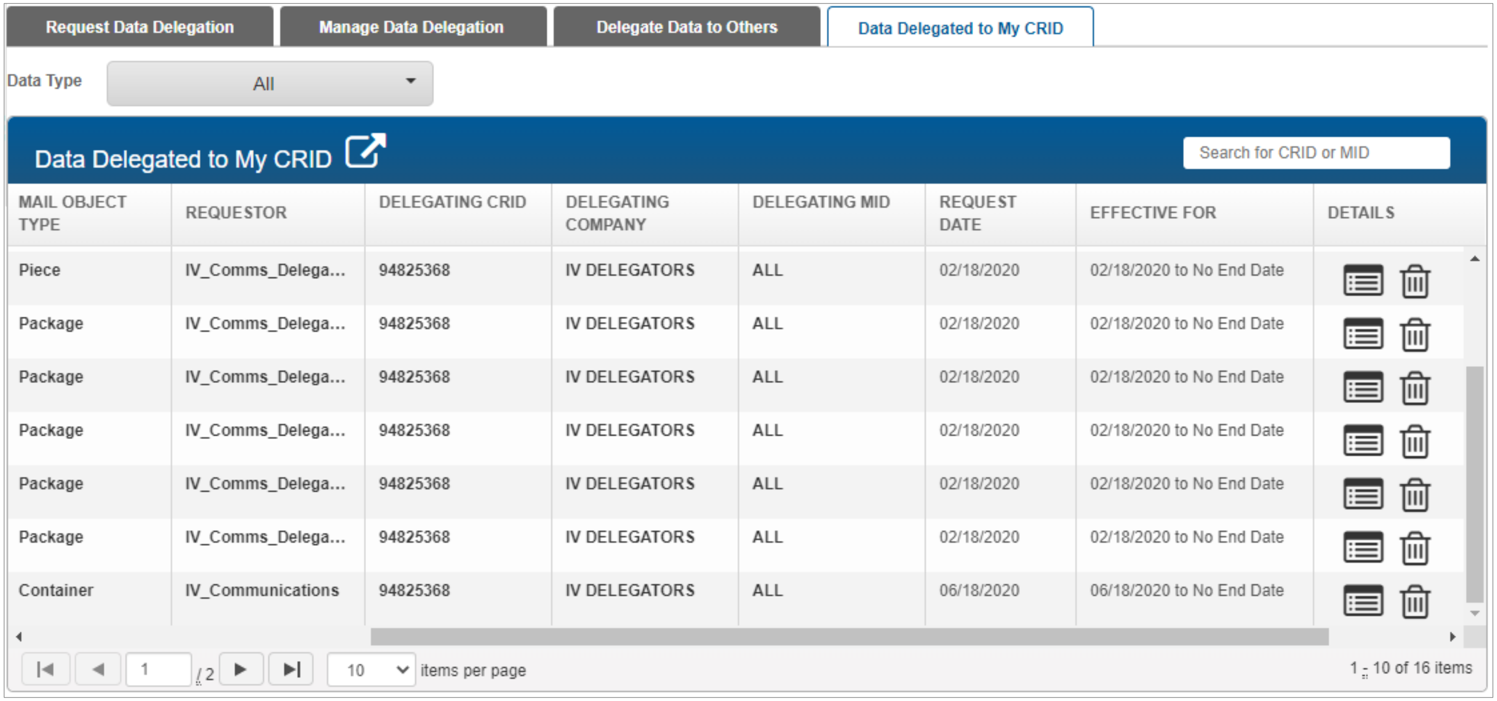
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

If you no longer wish to receive data from a delegation, you can delete it.

- All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

To delete an existing delegation, complete the following:

1. Access the **Data Delegated to My CRID** page and locate the delegation in the table.

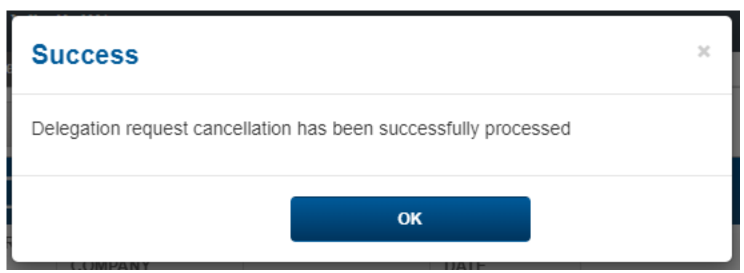


MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	

Deleting Data Delegations

2. Click the Delete icon for the delegation's entry. A confirmation pop-up will appear. Click **DELETE**.

3. A success message will appear, confirming that the delegation was deleted. Click **OK**. Once a deletion is made, the change will be reflected within about 15 minutes.



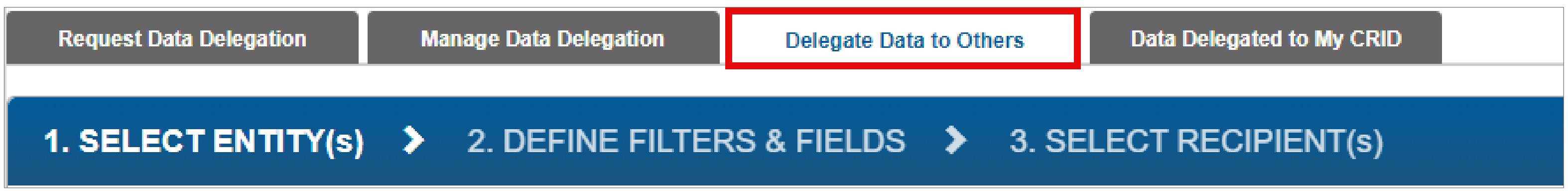
Delegating Data to Others

(BSA, BSA Delegate, and Data Delegation Managers Only)

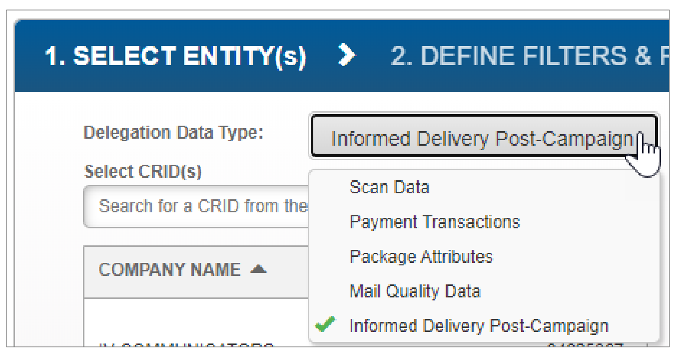
Delegating Data to Others

- **This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.**

- To begin, access the Delegate Data to Others area of the application:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Delegate Data to Others**.

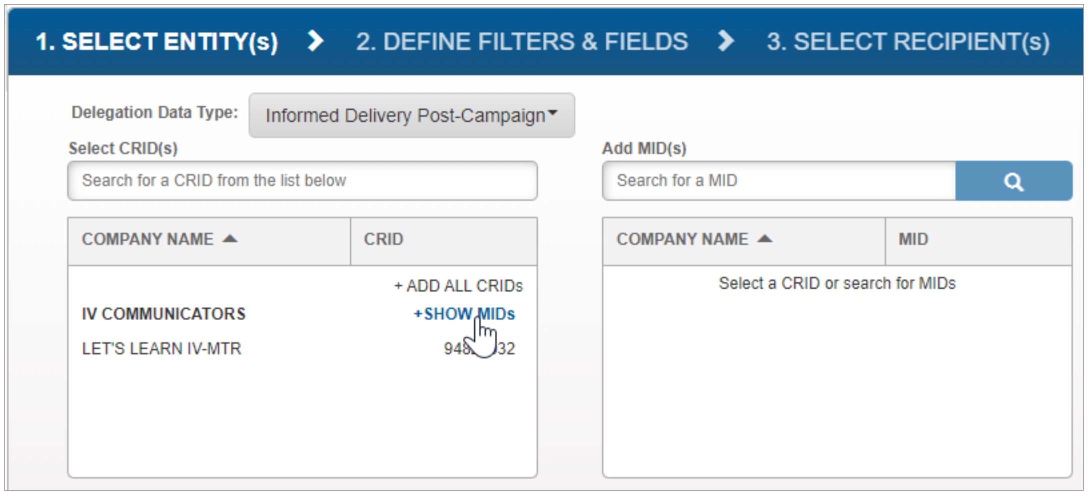


- Follow these steps to delegate data:
  1. In the **Delegation Data Type** dropdown, select **Informed Delivery Post-Campaign**.

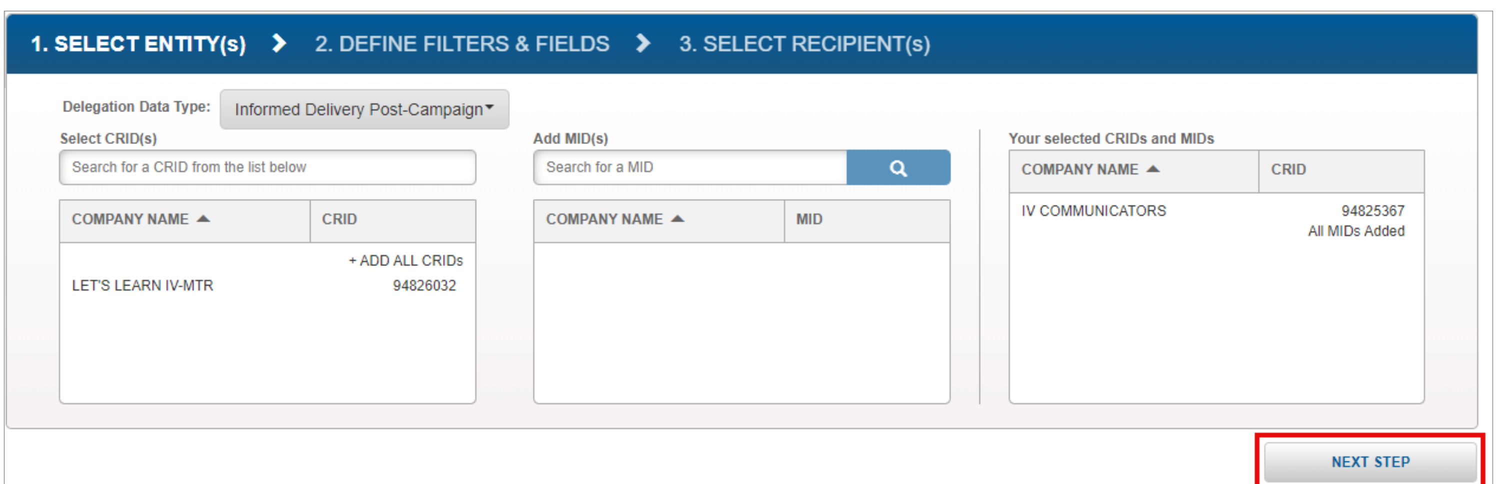


Delegating Data to Others

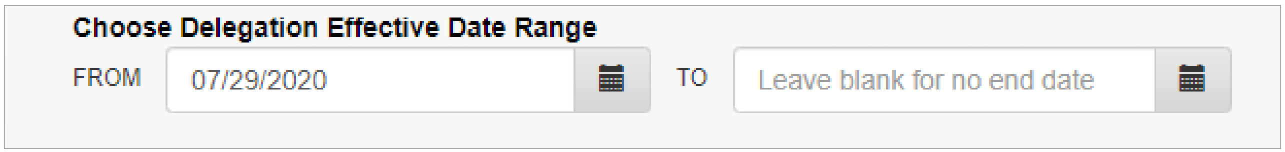
2. Use the **Select CRID(s)** and **Add MID(s)** panes to select the CRIDs and MIDs that will receive the data. Selected CRIDs will move from the Select CRID(s) pane to the Your selected CRIDs and MIDs pane.



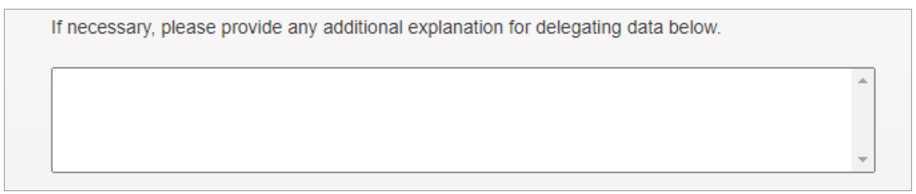
3. When you have finished selected your CRIDs and MIDs, click **NEXT STEP**.



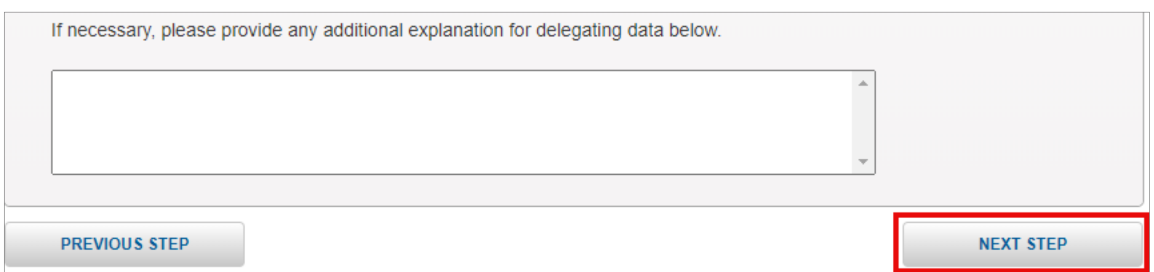
4. The Define Filters & Fields screen will appear. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
   - You cannot select dates in the past.
   - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the you request visibility for).



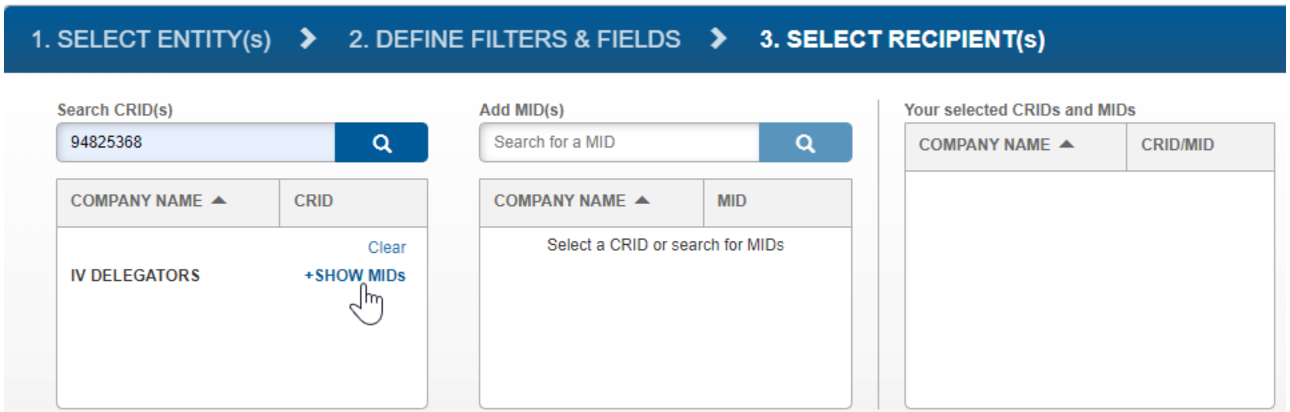
5. ***Optional:*** Enter any notes you would like to include with the delegation in the text box.



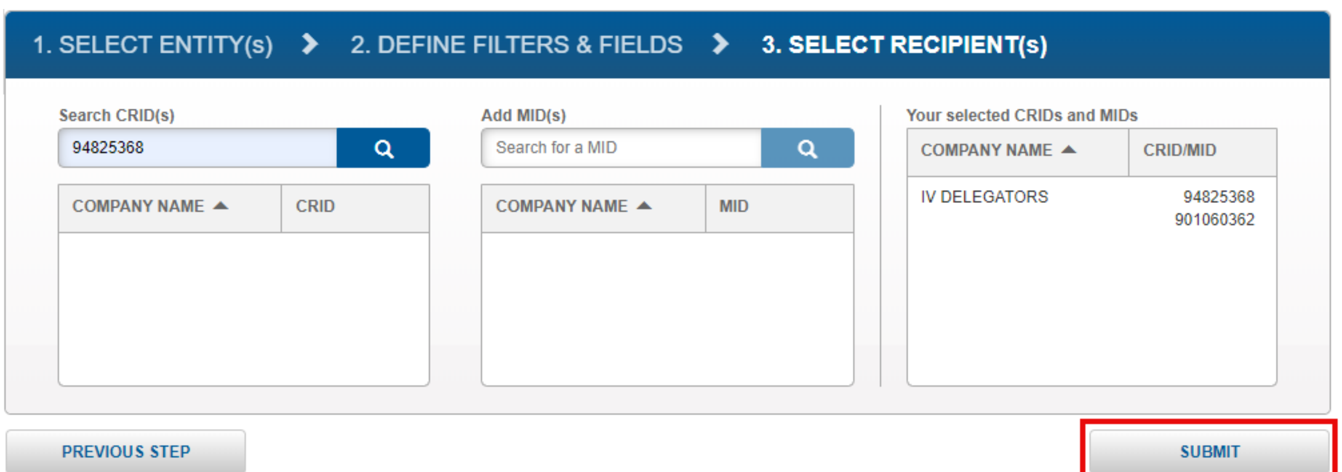
6. When you have finished, click **NEXT STEP**.



7. Use the **Search CRIDs** and **Add MIDs** panes to locate and add the CRIDs and MIDs you would like to provide visibility to. For best results, use the full CRID.
   - Selected CRIDs and MIDs will move from the Search CRID(s) pane to the Your selected CRIDs and MIDs pane.

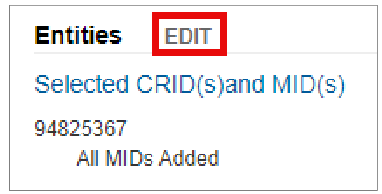


8. When you have finished adding CRIDs and MIDs, click **SUBMIT**.

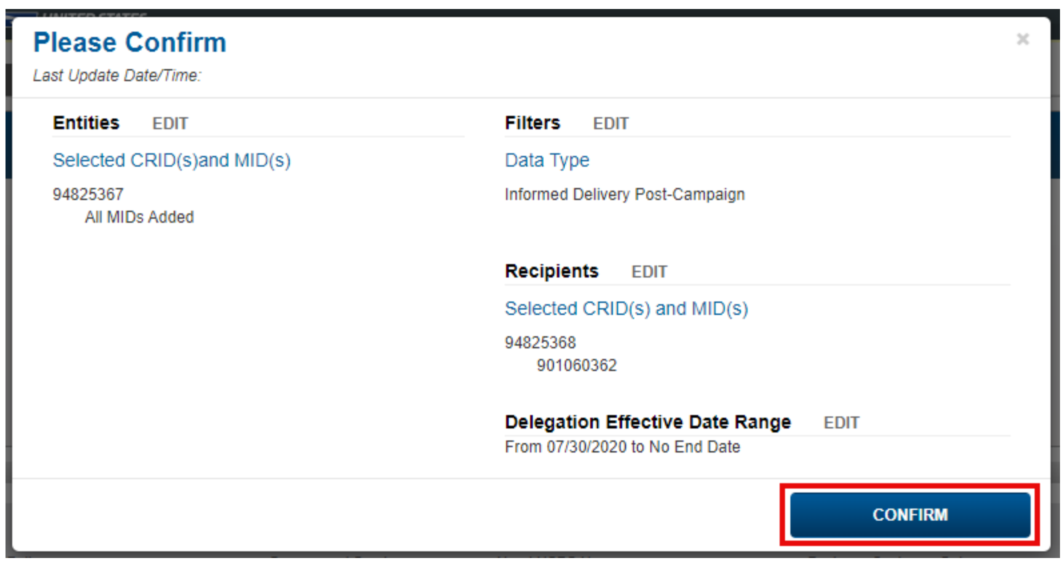


Delegating Data to Others

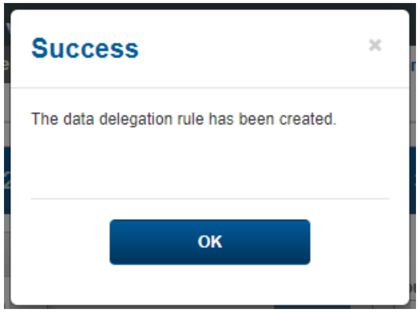
10. A confirmation screen will appear. Review the details of your delegation.
   - **If you need to make changes,** click the **EDIT** link next to the section that needs updates.



   - **If your delegation is ready to submit,** click **CONFIRM**.



11. A popup will appear, confirming your delegation has been submitted. Users of both the receiving and delegating CRIDs will be notified of the delegation according to their notification settings.



12. Your data delegation is now complete. The delegation will appear in the Data Delegation Authorization History table on the Manage Data Delegation tab.

Reviewing Data Delegation Requests

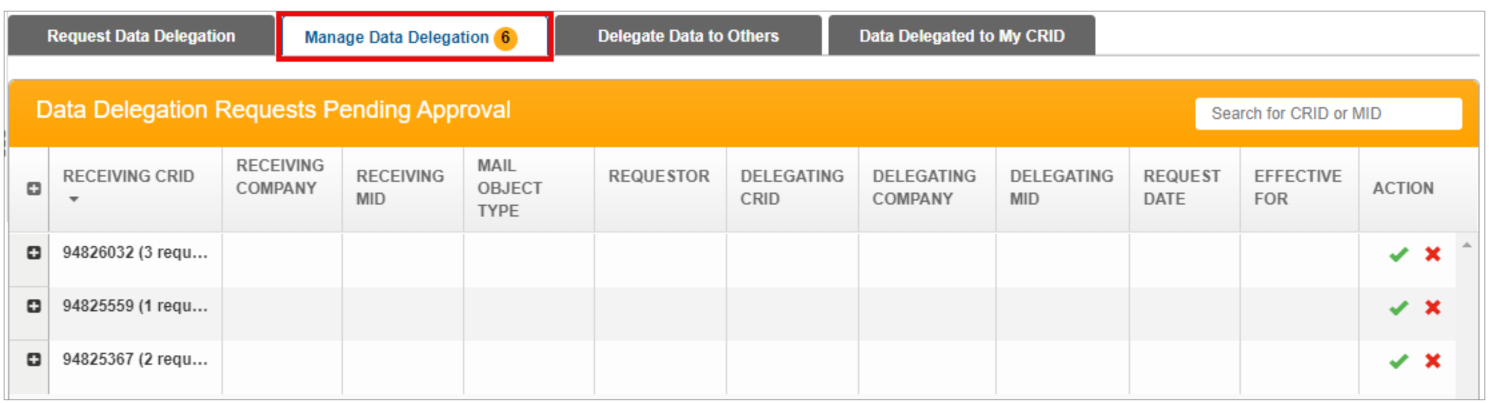
(BSA, BSA Delegate, and Data Delegation Managers Only)

Reviewing Delegation Requests

- **This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.**

- When another CRID sends a data delegation request to your CRID, a BSA, BSA Delegate, or Data Delegation Manager must review the request and approve or deny it. Instructions are provided in this section.

- To begin, access the Manage Data Delegation area of the application:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Manage Data Delegation**.
  3. The Manage Data Delegation screen appears, with the number of pending requests listed in the tab and the requests themselves in the Data Delegation Requests Pending Approval table.
     - Requests are grouped by the CRID that is requesting the delegation.



Reviewing Delegation Requests

To review the data delegation requests your CRID has received, follow these steps:

1. **To see the lists of requests:** Click the expand ⊞ icon next to a CRID to see its requests.

Data Delegation Requests Pending Approval — Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
⊞	94825367 (2 requ...										✔ ✖

2. **To view details of a request and modify it (if desired):** Scroll to the **Action** column and click the green checkmark ✔ for the request. The request's Details screen will appear, allowing you to review the request and make any modifications you like.

Data Delegation Requests Pending Approval — Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
⊟	94825367 (2 requ...										✔ ✖
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✔ ✖
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✔ ✖

3. Proceed as follows:
   - Approving requests
   - Denying requests

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Approving Delegation Requests

To approve requests:

- **Individually:** Click on the green checkmark for the request and select **APPROVE**. A success message will appear.

Data Delegation Requests Pending Approval

Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	

- **In bulk:** Click the green checkmark on the CRID line and select **APPROVE**.

Data Delegation Requests Pending Approval

Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	

The requests will appear in the Data Delegation Authorization History table at the bottom of the page. The users of the delegating and receiving CRIDs will be notified according to their notification settings.

Denying Delegation Requests

- **NOTE: All denials are final and cannot be undone.** If a delegation is denied by accident, a new one must be created.

- **To deny requests:**
  - **Individually:** Click on the red X for the request, select a reason for the denial, and click **SUBMIT**. A success message will appear.

Data Delegation Requests Pending Approval

Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										✔ ✖
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✔ ✖
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✔ ✖

  - **In bulk:** Click the red X on the CRID line, select a reason for the denial, and click **SUBMIT**. A success message will appear.

Data Delegation Requests Pending Approval

Search for CRID or MID

	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										✔ ✖
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✔ ✖

- The requests will appear in the Data Delegation Authorization History table at the bottom of the page. The users of the delegating and receiving CRIDs will be notified according to their notification settings.

Modifying & Deleting Existing Delegations

(BSA, BSA Delegate, and Data Delegation Managers Only)

Managing Data Delegated to Others

This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Delegators can modify any delegation at any time, for any reason.

- Any changes made will be effective from the date of modification forward.

The following modifications are available for IDPC delegations:

1. **Updating the end date to a date (today or future)**
   - If you would like to update the end date so data is delegated indefinitely, please contact the IV Solutions Center.

If you would like to change any other aspect of the delegation (including the recipients or data types), a new delegation must be created.

- If desired, you can delete the existing delegation using the instructions in this section.

Proceed as follows:

- Modifying an Existing Delegation
- Deleting an Existing Delegation

Modifying Existing Delegations

- To modify an existing delegation, complete the following:

1. Access the **Manage Data Delegation** page and locate the delegation in the Data Delegation Authorization History table at the bottom of the page.

Data Delegation Authorization History

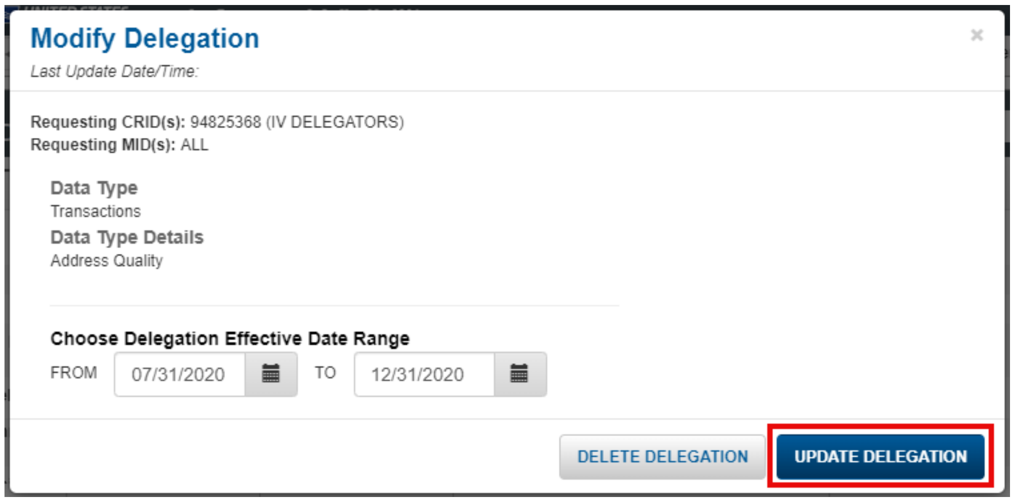
Search for CRID or MID

RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV COMMUNI...	ALL	Piece	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ca...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	

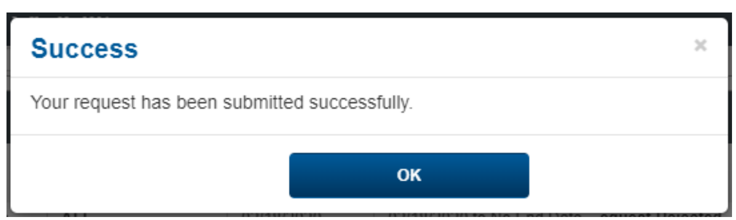
1 / 2 10 items per page 1 - 10 of 20 items

Modifying Existing Delegations

2. Click the Modify icon for the delegation. A Modify Delegation pop-up will appear, listing the details for the delegation. You can update the end dates as desired. When you have finished, click **UPDATE DELEGATION**.
    - If you would like to update the end date so data is delegated indefinitely, please contact the IV Solutions Center.



3. A success message will appear. The delegation recipients will be notified of the modifications according to their notification settings.



Deleting Data Delegations

- Delegators can delete any delegation at any time, for any reason.
  - Once a deletion is made, the change will be reflected within about 15 minutes.
  - All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

- To delete an existing delegation, complete the following:
  1. Access the **Manage Data Delegation** page and locate the delegation in the Data Delegation Authorization History table at the bottom of the page.

Data Delegation Authorization History

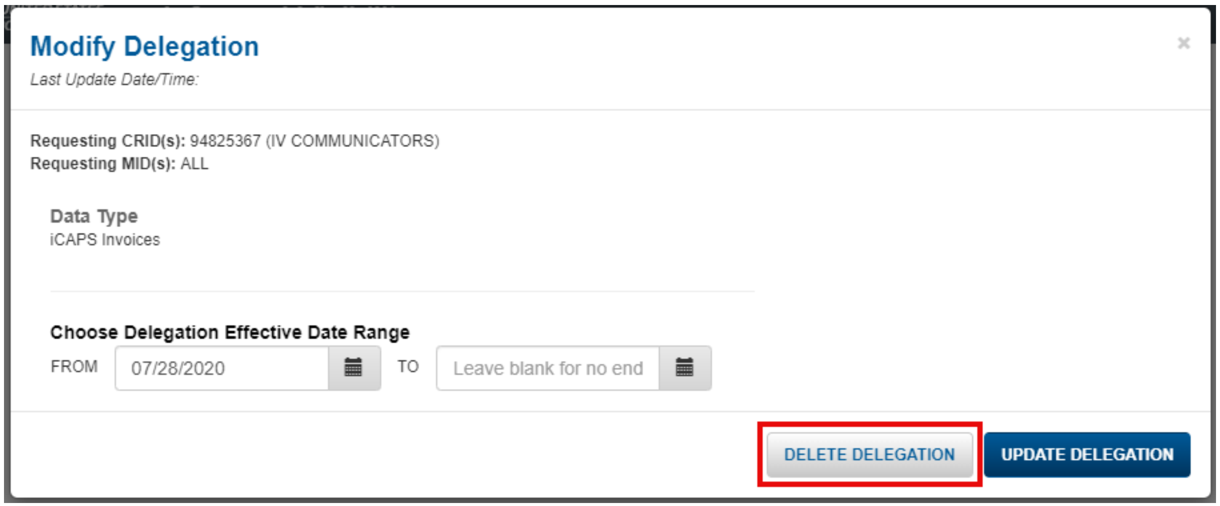
Search for CRID or MID

RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV COMMUNI...	ALL	Piece	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ca...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	

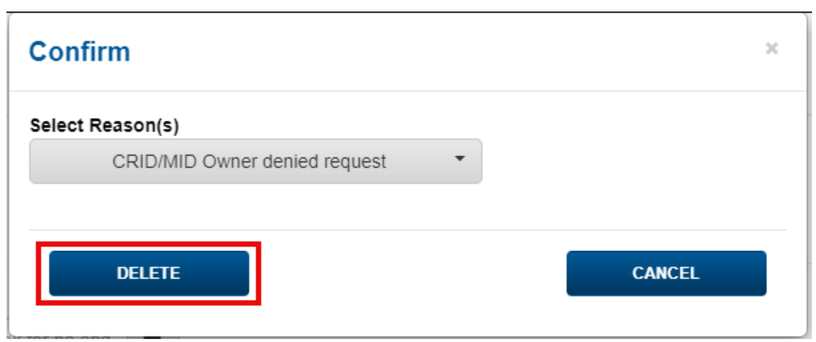
1 / 2 10 items per page 1 - 10 of 20 items

Deleting Data Delegations

2. Click the Modify icon. A Modify Delegation pop-up will appear, listing the details for the delegation. Click **DELETE DELEGATION**.



3. A Confirm pop-up will appear, listing the CRIDs and MIDs in the delegation. In the **Select Reason(s)** dropdown, choose a reason and click **DELETE**.



Deleting Data Delegations

4. A success message will appear, confirming that the delegation was deleted. Click **OK**. Once a deletion is made, the change will be reflected within about 15 minutes.