UNITED STATES POSTAL SERVICE®

Informed Visibility®

Mail Tracking & Reporting User Guide

v2.19.8, June 2025

Table of Contents

1 Introduction 1

1.1 Purpose 1

1.2 Background 1

1.3 IV-MTR Release Schedule 2

1.4 How IV-MTR Works 2

1.4.1 Central Data Hub 3

1.4.1.1 SCAN DATA 3

1.4.1.2 PASS-THROUGH DATA 4

1.4.2 Controlling User Access 4

1.4.2.1 BUSINESS CUSTOMER GATEWAY (BCG) 5

1.4.2.2 IV-MTR 7

1.4.3 Sharing Data with Other Organizations 8

1.4.4 Do I Need an IV-MTR Account? 8

2 Prerequisites for Receiving Tracking Data 9

2.1 Visibility Requirements for Mail Objects 9

2.1.1 Postal Wizard Mailings 11

2.2 Default Permissions 12

2.3 Individual Permissions 13

3 Data Provisioning Options 14

3.1 One-Time Query or Data Feed 14

3.2 Delivery Methods 15

3.3 File Formats 15

3.3.1 Online View 19

3.3.2 IMb Tracing Legacy PKG File 19

3.3.3 Delimited (TXT) File 20

3.3.4 Mail.XML Messages 21

3.3.4.1 PULL MESSAGES 21

3.3.4.2 PUSH MESSAGES 21

3.3.5 JSON File 22

3.4 Scan Enrichment 22

3.4.1 Raw Scans (Actual Scans) 22

3.4.2 Enriched Scans (Assumed & Logical Scans) 23

3.4.3 Choosing a Scan Type 24

4 Access the IV-MTR Web Application 25

4.1 Getting Started ... 25

4.1.1 Choosing the IV-MTR BSA ... 25

4.1.2 Choosing Your CRID ... 26

4.1.3 Process Overview ... 26

4.2 Register as a New User ... 27

4.2.1 Pick Username ... 27

4.2.2 Enter Security Information ... 28

4.2.3 Enter Contact Information ... 29

4.2.4 Find Address ... 29

4.2.4.1 BY ADDRESS ... 30

4.2.4.2 BY ZIP CODE ... 33

4.2.4.3 BY CUSTOMER IDENTIFIER (CRID) ... 36

4.3 Add the IV-MTR Service ... 37

4.3.1 New User at a New Location ... 38

4.3.2 New User at an Existing Location ... 40

4.3.3 Existing User at a New Location (New CRID) ... 42

4.3.4 Existing User at an Existing Location (Existing CRID) ... 46

4.4 Access the Application ... 47

4.4.1 Directly Accessing IV-MTR ... 47

4.4.2 Accessing IV-MTR through the BCG Portal ... 48

5 Application Areas and User Functionality ... 51

5.1 Basic Navigation ... 51

5.1.1 IV-MTR Homepage ... 51

5.1.2 Navigation and Widget Bars ... 51

5.2 Application Areas ... 52

6 IV-MTR BSA Functions ... 55

7 One-Time Queries ... 56

7.1 Getting Started ... 56

7.1.1 Process Overview ... 56

7.1.2 Saving Time with Saved Reports ... 56

7.2 Beginning a One-Time Query ... 57

7.2.1 Access the One-Time Query Screen ... 58

7.2.2 Choose a Data Type ... 59

7.3 Selecting Entity(s) ... 59

7.3.1 Entity Selection Tools ... 60

7.3.2 Data Availability ... 60

7.3.3 Select CRIDs Pane 61
7.3.4 Add MIDs Pane 63
7.3.5 Select Routing Codes Pane 65
7.3.6 Review Entity Selection 67
7.4 Selecting a Delivery Method 68
7.4.1 Prepare for Online View 69
7.4.2 Prepare for Data Download 70
7.4.3 Send to Address 71
7.5 Defining Filters & Fields 75
7.5.1 Reviewing Entities 76
7.5.2 Choosing a Mail Object Type 76
7.5.2.1 CONTAINER-, HANDLING UNIT-, AND BUNDLE-LEVEL QUERIES 77
7.5.2.2 MAIL OBJECT NAVIGATOR QUERIES 77
7.5.2.3 PIECE-LEVEL QUERIES 78
7.5.3 Setting Filters (Optional) 79
7.5.4 Choosing and Organizing Data Fields 82
7.5.4.1 DEFINING FIELDS FOR ONLINE VIEW & DELIMITED FILES 83
7.5.4.2 REVIEWING FIELDS FOR MAIL OBJECT NAVIGATOR AND IMB TRACING LEGACY PACKAGE FILES 85
7.6 Submitting Your Query 86
7.6.1 Processing Queue Limits 87
7.7 Retrieving One-Time Query Results 88
7.7.1 Online View 89
7.7.1.1 EXPORTING ONLINE VIEW RESULTS 90
7.7.1.2 REVIEWING MAIL OBJECT NAVIGATOR RESULTS 91
7.7.2 One-Time Query Output History (Data Download & Send to Address) 94
7.8 Interpreting One-Time Query Results 96

8 Data Feeds 97

8.1 Create New Feed 98
8.1.1 Select Initial Feed Options 99
8.1.1.1 SELECT SUBSCRIPTION OWNER CRID 100
8.1.1.2 SELECT FEED DATA TYPE 100
8.1.1.3 SELECT FILE FORMAT AND DEFINE TARGET 100
8.1.1.4 SELECT FREQUENCY AND START TIME 110
8.1.1.5 NAME THE FEED 112
8.1.2 Select Entity(s) 112
8.1.2.1 OPTION 1: SELECT CRID(S), THEN MID(S) 113
8.1.2.2 OPTION 2: DIRECTLY ADD MID(S) 116

8.1.2.3 OPTION 3: ADD ROUTING CODE(S) 119
8.1.2.4 REMOVE SELECTED ENTITY(S) 121
8.1.2.5 MODIFY OR REMOVE STID(S) 121
8.1.3 Define Filters & Fields 123
8.1.3.1 VIEW SELECTED ENTITY(S) 123
8.1.3.2 SELECT MAIL OBJECT AND HANDLING EVENT TYPE(S) 124
8.1.3.3 ADD FILTER(S) 124
8.1.3.4 SELECT AND ARRANGE DATA FIELDS 126
8.1.3.5 FINISH 127
8.2 View or Modify Existing Feed 128
8.2.1 Output History 129
8.2.2 View Details 130
8.2.3 Modify Details 131
8.2.4 Activate/Deactivate a Data Feed 133
9 Data Delegation 134
9.1 Request Data Delegation 136
9.1.1 Request Data Delegation 136
9.1.1.1 SELECT ENTITY(S) 137
9.1.1.2 DEFINE FILTERS & FIELDS 142
9.1.1.3 SELECT RECIPIENT(S) 146
9.1.1.4 SUBMIT REQUEST 152
9.1.2 Request History 153
9.1.3 Data Delegation Requests Pending Approval for My CRID 155
9.2 Manage Data Delegation 156
9.2.1 Data Delegation Requests Pending Approval 156
9.2.1.1 APPROVE DATA DELEGATION REQUEST(S) 157
9.2.1.2 DENY DATA DELEGATION REQUEST(S) 160
9.2.2 Data Delegation Authorization History 161
9.2.2.1 MODIFY AN EXISTING DATA DELEGATION RULE 163
9.2.2.2 DELETE AN EXISTING DATA DELEGATION RULE 164
9.3 Delegate Data to Others 165
9.3.1 Select Entity(s) 166
9.3.1.1 OPTION 1: SELECT CRID(S), THEN MID(S) 166
9.3.1.2 OPTION 2: DIRECTLY ADD MID(S) 169
9.3.2 Define Filters & Fields 172
9.3.2.1 VIEW SELECTED ENTITY(S) 173
9.3.2.2 SELECT MAIL OBJECT AND HANDLING EVENT TYPE(S) 173
9.3.2.3 ADD FILTER(S) 173
9.3.2.4 SELECT DATA FIELDS 174

9.3.2.5 CHOOSE EFFECTIVE DATE RANGE 175
9.3.2.6 GO TO NEXT STEP 175
9.3.3 Select Recipient(s) 175
9.3.3.1 OPTION 1: SEARCH FOR CRID(S), THEN ADD MID(S) 176
9.3.3.2 OPTION 2: DIRECTLY ADD MID(S) 178
9.3.4 Submit 180
9.4 Data Delegated to My CRID 181
10 Address Book 184
10.1 View and Add Servers 184
10.1.1 Your Servers 185
10.1.2 Add New Server 185
10.1.2.1 SECURE FILE TRANSFER PROTOCOL (SFTP) SERVER 186
10.1.2.2 HTTPS MAIL.XML WEB SERVICE 188
10.1.2.3 HTTPS JSON WEB SERVICE 189
10.1.3 Special SFTP Scenarios 190
10.1.3.1 NON-STANDARD PORT 190
10.1.3.2 USPS-PROVIDED SERVER 191
10.2 View and Add Contacts 193
10.2.1 Contacts 193
10.2.2 Add New Contact 194
11 Roles and Permissions 195
11.1 Roles & Permissions vs. Data Delegation 195
11.2 User Roles 196
11.3 Default and Custom Roles & Permissions 197
11.4 Managing Roles & Permissions 197
11.4.1 Manage by CRID 198
11.4.1.1 VIEW ASSIGNED ROLES 200
11.4.1.2 ASSIGN A ROLE 201
11.4.1.3 REMOVE A ROLE 204
11.4.1.4 VIEW ASSIGNED PERMISSIONS 205
11.4.1.5 ASSIGN PERMISSIONS 206
11.4.1.6 REMOVE PERMISSIONS 210
11.4.2 Manage by User 211
11.4.2.1 VIEW ASSIGNED ROLES 212
11.4.2.2 ASSIGN A ROLE 213
11.4.2.3 REMOVE A ROLE 216
11.4.2.4 VIEW ASSIGNED PERMISSIONS 217
11.4.2.5 ASSIGN PERMISSIONS 218

11.4.2.6 REMOVE PERMISSIONS 221
11.4.2.7 RESET TO CRID OR USPS DEFAULT 221
11.4.2.8 GRANT DELEGATED DATA BY DEFAULT 223
11.4.3 Set the CRID Default 223

12 Notifications 225

12.1 Available Notifications 225

12.2 In-App Notifications 227

12.2.1 Notification Bars 227
12.2.2 Notifications Inbox 228

12.3 Email Notifications 229

12.4 Managing Notification Preferences 230

12.4.1 Email Preferences 230
12.4.2 Notification Settings 231

13 Saved Reports 233

13.1 Saved Entity 233

13.1.1 Create a Saved Entity 234
13.1.2 Load a Saved Entity 235
13.1.3 Modify a Saved Entity 236
13.1.4 Delete a Saved Entity 238
13.1.5 Associate a Saved Entity to a Data Feed 239
13.1.6 Update a Saved Entity Associated to a Data Feed 242
13.1.7 Disassociate a Saved Entity from a Data Feed 246

13.2 Saved Filter 246

13.2.1 Create a Saved Filter 246
13.2.2 Load a Saved Filter 247
13.2.3 Modify a Saved Filter 248
13.2.4 Delete a Saved Filter 249

13.3 Saved View 250

13.3.1 Create a Saved View 250
13.3.2 Load a Saved View 251
13.3.3 Modify a Saved View 252
13.3.4 Delete a Saved View 253

13.4 Saved Report 254

13.4.1 Create a Saved Report 254
13.4.2 Load a Saved Report 255
13.4.3 Modify a Saved Report 256

13.4.4 Delete a Saved Report ... 257

14 Mail Tracking Help & Reference Data ... 259

14.1 Mail Tracking Help ... 259

14.2 Reference Data ... 260

15 Understand Mail Flow and Interpret Scan Data ... 261

15.1 Bundle and Piece Status ... 261

15.1.1 Predicted Delivery Date ... 261

15.1.2 Assumed Handling Events ... 261

15.1.3 Logical Handling Events ... 261

15.2 Container and Handling Unit Status ... 261

15.2.1 Assumed Handling Events ... 262

15.3 Scan Event Codes ... 262

16 Data Dictionary and Sample Data Set ... 265

16.1 Data Dictionary ... 265

16.2 Sample Data Set ... 265

17 Additional Notes ... 266

17.1 Data Retention ... 266

17.2 Session Timeout ... 266

17.3 Table Columns ... 266

18 Customer Support ... 267

18.1 IV Solutions Center ... 267

18.2 PostalOne! Help Desk ... 268

Appendix A Change History ... 270

Appendix B Acronyms and Abbreviations ... 277

Appendix C Definitions ... 278

C.1 Mail Objects ... 278

C.2 Nesting 278

C.3 Handling Event Types ... 279

Appendix D References ... 280

Appendix E Business Rules ... 282

E.1 Predicted Delivery Date ... 282

E.1.1 Enroute Handling Event ... 282

E.1.2 Destination Handling Event 283
E.1.2.1 NON-LAST PROCESSING HANDLING EVENT 283
E.1.2.2 LAST PROCESSING HANDLING EVENT 283
E.1.3 Example of PDD Calculation for a Mailpiece 284
E.2 Assumed Handling Events 285
E.2.1 Available Assumed Handling Events 285
E.2.2 Physical vs. Logical Nesting Associations 286
E.2.2.1 PHYSICAL NESTING ASSOCIATIONS 286
E.2.2.2 LOGICAL NESTING ASSOCIATIONS 287
E.3 Logical Handling Events 287
E.3.1 Logical Out for Delivery Events 288
E.3.2 Logical Delivery Events 288
Appendix F Import CSV or TXT File into Microsoft Excel 290
Appendix G Legacy *PostalOne!* Informed Visibility Download File Format 293
Appendix H CRID and MID Role Identification 296
H.1 Mail Owner 296
H.2 Mail Preparer 296
H.3 eDoc Submitter 297
H.4 FAST Scheduler 298
H.5 MID on Piece 298
H.6 MID on Tray 298
H.7 MID on Container 298
Appendix I Legacy PKG File Naming Convention 299
Appendix J Delimited, Mail.XML, and JSON File Naming Convention 300
Appendix K Piece-Level One-Time Query Guardrails 301

List of Figures

Figure 1.1. IV-MTR Data Flow Overview 3
Figure 1.2. IV-MTR Access Controls Overview 5
Figure 3.1: Example Scans in Legacy IMb Tracing File Format 20
Figure 3.2: Actual Scan Illustration 23
Figure 3.3: Assumed Actual Scan Illustration 23

Figure E.1: Processing Events for Enhanced Bundle Visibility 285
Figure E.2: Potential Physical Parent Mail Object Relationships 287
Figure E.3: Logical Out for Delivery Process for Bundle Visibility 288

List of Tables

Table 1.1. Pass-through Data Resources 4
Table 1.2. BCG User Levels 6
Table 1.3. IV-MTR User Levels 7
Table 2.1: Definitions of Visibility Requirement Terms 9
Table 2.2: Visibility Requirements by Mail Object and Handling Event Type 10
Table 2.3: Default Permissions by CRID or MID Role 12
Table 3.1: IV-MTR Delivery Methods 15
Table 3.2: One-Time Query File Formats by Delivery Method 16
Table 3.3: Data Feed File Formats by Delivery Method 16
Table 3.4: File Format Characteristics 17
Table 3.5: Legacy PKG File Data Fields 20
Table 3.6: Raw and Enriched Handling Events by Delivery Method and File Format 24
Table 3.7: Pros and Cons of Raw and Enriched Handling Events 24
Table 4.1. IV-MTR Signup Process 26
Table 4.2. Applying for IV-MTR Access 26
Table 4.3: Scenarios for Adding the IV-MTR Service 37
Table 5.1 Application Areas and Availability Overview 53
Table 5.2: Functionality by Access Level and User Role 54
Table 6.1. Instructions for Completeing IV-MTR BSA-Level Tasks 55
Table 8.1: Data Feed Define Filters & Fields Screen Functions 123
Table 9.1: Request Data Delegation Define Filters & Fields Screen Functions 142
Table 9.2: Delegate Data to Others Define Filters & Fields Screen Functions 172
Table 11.1: Examples of Data Delegation and Roles & Permissions Management 195
Table 11.2: IV-MTR Application User Roles 196
Table 11.3: Actions for Manage CRIDs and Manage Users Tabs 198
Table 12.1. One-Time Queries Notifications - Alerts 225
Table 12.2: Data Delegation Notifications - Actions 225
Table 12.3: Data Delegation Notifications - Alerts 226
Table 12.4: Roles & Permissions Notifications - Alerts 226
Table 13.1: Saved Report Descriptions and Availability 233

Table E.1: PDD Calculation for Enroute Handling Event 282
Table E.2: PDD Calculation for Last Processing Handling Event 283
Table E.3: Examples of PDD Calculation for Last Processing Events 284
Table E.4: Example of PDD Calculation for a Mailpiece 284

Table E.5: Inventory and Trigger Criteria for Logical Delivery Events 289
Table G.1: Mapping of *PostalOne!* Fields to IV-MTR Fields 293
Table H.1: Mail.dat Mail Owner Identification Rules 296
Table H.2: Mail.XML Mail Owner Identification Rules 296
Table H.3: EM-DOC Mail Owner Identification Rules 296
Table H.4: Mail.dat Mail Preparer Identification Rules 296
Table H.5: Mail.XML Mail Preparer Identification Rules 297
Table H.6: EM-DOC Mail Preparer Identification Rules 297
Table H.7: Mail.dat eDoc Submitter Identification Rules 297
Table H.8: Mail.XML eDoc Submitter Identification Rules (Mailpieces) 297
Table H.9: Mail.XML eDoc Submitter Identification Rules (Containers and Handling Units) 297
Table H.10: EM-DOC eDoc Submitter Identification Rules 298
Table H.11: Mail.dat FAST Scheduler Identification Rules 298
Table H.12: Mail.XML FAST Scheduler Identification Rules (Mailpieces) 298
Table H.13: Mail.XML FAST Scheduler Identification Rules (Containers and Handling Units) 298
Table K.1: Piece-Specific One-Time Query Guardrails 301

1 Introduction

1.1 Purpose

This guide provides information about the United States Postal Service® (USPS®) Informed Visibility® Mail Tracking & Reporting (IV®-MTR) application. The IV-MTR application is a free service provided by the Postal Service™ that allows mailers to:

- Track domestic-bound letter and flat mail at all levels (including containers; handling units of trays, tubs, and sacks; bundles; and pieces) using scan data*
- Receive pass-through data from other USPS systems, including Enterprise Payment System (EPS), Mail Quality Data (MQD), and others

The intended audience for this guide is mailers. In this document, you will find:

- General information about the IV-MTR application
- The prerequisites for receiving scan data
- The data provisioning options available
- Instructions for using the application
- Information about interpreting scan data
- Support resources for any questions you may have

At times, mailers using this guide will be directed to external IV-MTR resources where they can find detailed information about specific aspects of the application. When referenced, direct links to those resources will be provided. However, all IV-MTR resources (including the most recent version of this guide) can be found on the IV-MTR PostalPro™ page.

Tutorial videos that provide step-by-step examples of the instructions in this guide are also available in the IV-MTR application itself. See Section 14: *Mail Tracking Help* for more details.

* International-bound and package tracking data is not available in IV-MTR at this time.

1.2 Background

Prior to IV-MTR, mail tracking functionality for letters and flats (and their associated containers, handling units, and bundles) was limited for several reasons:

1. The tracking data was distributed across several applications:
    - Intelligent Mail® barcode (IMb®) Tracing® (formerly CONFIRM®) provided automated piece and bundle tracking data
    - *PostalOne!®* provided container and handling unit tracking data
2. The availability of tracking data was delayed, limiting usefulness to mailers
3. Tracking data was limited to actual scans of containers, handling units, bundles, or pieces, making it difficult to have full visibility of mail
    - As mailpieces are processed, they are nested, de-nested, and re-nested in and out of handling units and containers
    - Legacy systems were unable to capture all nesting relationships between mailpieces, handling units, and containers, which left gaps in end-to-end visibility

IV-MTR is designed to address these limitations and provide a current, comprehensive mail data repository for the Postal Service by:

1. Consolidating all mail tracking functionality for containers, handling units, bundles, and pieces into one application
2. Providing tracking data in near real-time, increasing usefulness to mailers
3. Capturing nesting associations to enhance visibility and provide end-to-end tracking across the entire mailstream by using logical and assumed handling events

This allows mailers to plan their mailings, measure the success of each mailing campaign, and efficiently staff sites. Combined with the improved ease of use for mailers through flexible data provisioning (how you get data) and flexible data delegation (how you share data visibility), IV-MTR helps mailers increase the value of mail.

1.3 IV-MTR Release Schedule

New functionality in the IV-MTR application is implemented using a phased approach. The official Release Schedule for the application is available in the Release Schedule section of the IV-MTR PostalPro page.

Mailers interested in learning more about new functionality before it is released are encouraged to join the Mailers' Technical Advisory Committee (MTAC) User Group 4 (UG4). UG4 is an open forum for representatives from USPS and the mailing industry to discuss mail visibility and IV-MTR. More information about UG4, including instructions for joining the group, are available in the About MTAC UG4 document on the IV-MTR PostalPro page.

1.4 How IV-MTR Works

The IV-MTR application makes it easy to receive several types of data and control who can access it. This section provides an introduction to:

- IV-MTR as a Central Data Hub – the types of data available and where they come from
- Controlling User Access – the ways in which you can control who can access your data
- Sharing Data with Other Organizations – how you can delegate or receive data from other entities
- Do I Need an IV-MTR Account? – information to help you decide whether or not an IV-MTR account is necessary for your needs

1.4.1 Central Data Hub

The IV-MTR application receives data from several Postal data streams and passes it on to users, as shown in the figure below.

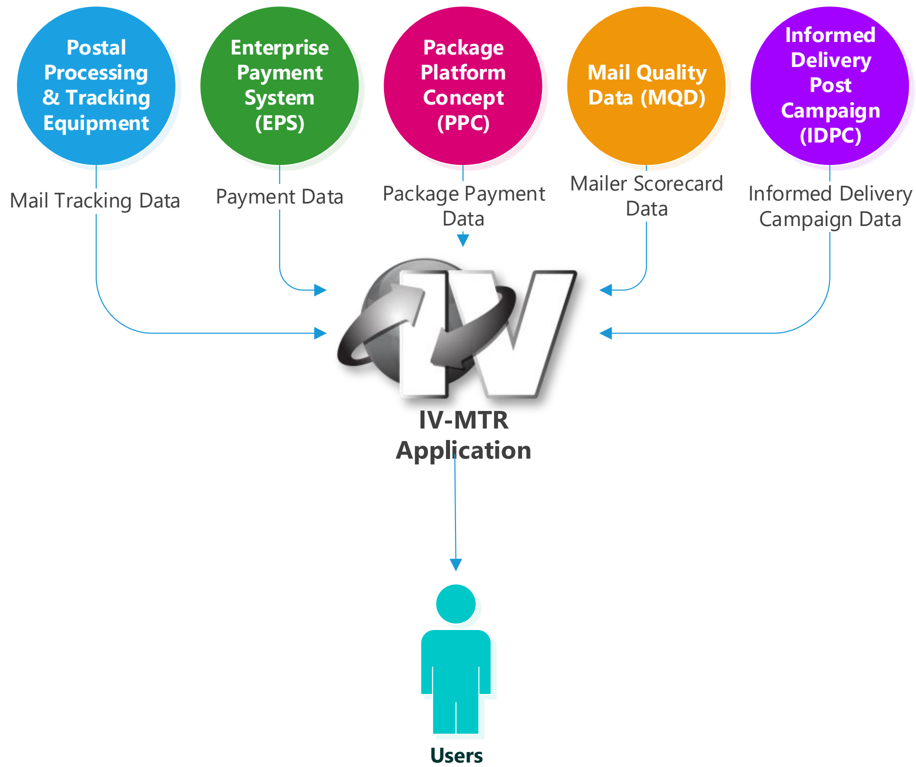


Figure 1.1. IV-MTR Data Flow Overview

There are two categories of data available from IV-MTR:

1. Scan Data
2. Pass-through Data

More information about these categories is provided in the sections below.

1.4.1.1 Scan Data

Scan data is mail tracking data that is generated by Postal processing and tracking equipment, including mail processing machines, handheld scanners, and location tracking devices. It also includes some administrative data from Electronic Documentation (eDoc) and other similar applications. The IV-MTR team is responsible for maintaining the scan data available in the application.

Instructions for receiving scan data through IV-MTR are provided in this document.

For a complete listing of the scan data available, please see the IV-MTR External Data Dictionary. For example scan data, please see the IV-MTR Sample Data Set.

1.4.1.2 Pass-through Data

Pass-through data is non-scan data that is generated by other Postal systems and provisioned through the IV-MTR application. The pass-through data currently available in IV-MTR includes:

- EPS data – payment information for mailings, PO Boxes, and other Postal products
- Informed Delivery® Post-Campaign (IDPC) data – processing, open, and click-through results for Informed Delivery interactive campaigns
- MQD data – detailed error data from the Mailer Scorecard
- Package Platform Concept (PPC) data – physical and payment information for packages

Since pass-through data is only provisioned by IV-MTR, the IV-MTR team is not responsible for generating or maintaining this data. Pass-through data is generated and maintained by the systems that create it.

See the table below for system-specific provisioning instructions.

Table 1.1. Pass-through Data Resources

Resource	Document
EPS Data	
Instructions for receiving EPS data	Provisioning EPS & PPC Data through IV-MTR
Complete listing of EPS data available through IV-MTR	EPS Data Dictionary
IDPC Data	
Instructions for receiving IDPC data	Provisioning IDPC Data through IV-MTR
Complete listing of IDPC data available through IV-MTR	IDPC Data Dictionary
Example IDPC data	IDPC Sample Data Set
MQD Data	
Instructions for receiving MQD data	Provisioning MQD Data through IV-MTR
Complete listing of MQD data available through IV-MTR	MQD Data Dictionary
PPC Data	
Instructions for receiving PPC data	Provisioning EPS & PPC Data through IV-MTR
Complete listing of PPC data available through IV-MTR	PPC Data Dictionary

1.4.2 Controlling User Access

The IV-MTR application partners with the Business Customer Gateway (BCG) to administer users' access in IV-MTR. This allows you to set up a fully customizable access plan, from controlling who can enter the IV-MTR application to what actions they are allowed to complete. An overview of the access controls is provided in the figure below. Each of these controls is explained in more detail in the following subsections.

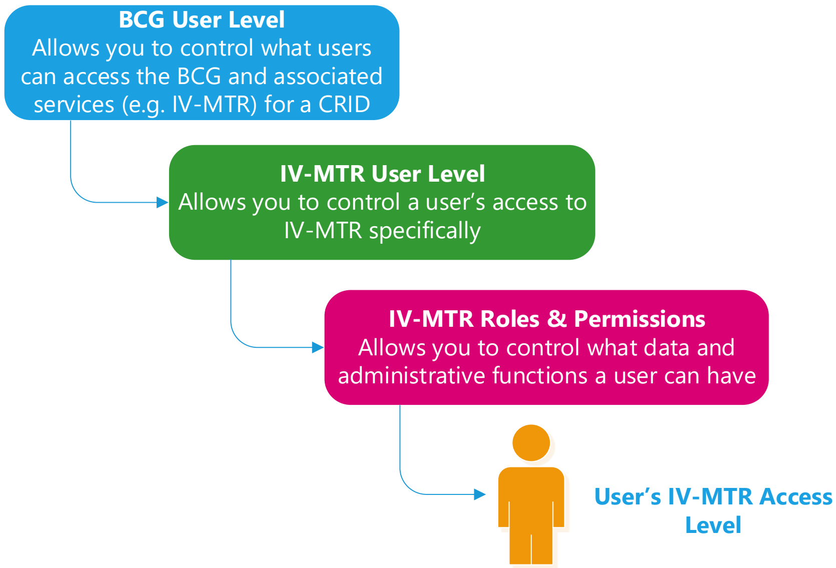


Figure 1.2. IV-MTR Access Controls Overview

1.4.2.1 Business Customer Gateway (BCG)

The BCG is a single entry point for multiple USPS online business services, including the IV-MTR application. General information about the BCG, including the services available through it (such as EPS and IV-MTR), account types, and navigation information, is available on the BCG PostalPro page.

To access the BCG business services, you need to have a BCG account. Instructions for creating a BCG account are provided in Section 4: *Access the IV-MTR Web Application* of this document.

The BCG contributes to the access controls for IV-MTR in three ways:

1. Associates Customer Registration IDs and Mailer Identifications (CRIDs and MIDs) to each user
2. Allows the admin user for each CRID to assign BCG User Levels to other users
3. Designates a Business Service Administrator (BSA) for each CRID

More information about these controls is provided below.

1.4.2.1.1 CRIDs and MIDs

All BCG accounts are connected to one or more Customer Registration IDs (CRIDs). A CRID:

- Is a unique identification number used to identify a physical business location (address)
- Connects an organization location's information across all USPS systems

An organization may have more than one CRID if it has more than one physical address.

Each CRID also has one or more Mailer Identifications (MIDs). A MID:

- Is a unique identification number that identifies a specific mail owner, mailing agent, or other service provider

- Is used in all IMb, Intelligent Mail container barcodes (IMcb), Intelligent Mail package barcodes (IMpb®) and Intelligent Mail tray barcodes (IMtb)

Organizations may have multiple MIDs depending on mail volume.

General information about CRIDs and MIDs is available in the Mailing Services section of PostalPro.

CRIDs and MIDs contribute to IV-MTR access control because access to both BCG and IV-MTR is granted on a per-CRID basis. If your organization has multiple CRIDs, you'll need to understand which CRID(s) you need access for.

You are assigned a specific user level for each CRID you have access to in the BCG. Information on BCG user levels is provided in the next section.

1.4.2.1.2 BCG User Levels

Within the BCG, users are assigned a user level for each CRID they have access to. Each user's access level for a CRID is determined by the BSA and can be updated at any time by the CRID's BSA or BSA Delegate.

Important: Access to both BCG and IV-MTR is granted on a per-CRID basis. It's possible for you to have administrative access for one CRID, but only general access for another.

The four BCG user levels are explained in the table below.

Table 1.2. BCG User Levels

BCG User	Access Description
BSA	Manager of CRID. Has highest level of access and is in charge of granting other users access to CRID. Grants permission for other users to the CRID's business services, such as EPS and IV-MTR. See the BSA section for further details.
BSA Delegate	User who has been granted BSA powers for CRID, but is not the actual BSA.
General User	User who has regular, non-administrative access for CRID. Cannot access a CRID's business services until approved by the BSA or BSA Delegate.
No Access	User who has no access for CRID.

1.4.2.1.3 Business Service Administrator (BSA)

Each CRID is assigned a BSA in BCG. The BSA is in charge of all account administration for its CRID, including managing the services it has access to and the users associated with it. The BSA also manages and implements the access control plan for its CRID. BSAs have the highest level of access in both BCG and IV-MTR, and are able to see administrative screens that are hidden from other users.

BSAs are assigned at the time of CRID setup in the BCG. They can be reassigned as needed by contacting PostalOne! Help Desk or the IV Solutions Center.

There can only be one BSA at a time for a CRID. However, the BSA can designate another user as a BSA Delegate. BSA Delegates have the same powers as BSAs, except that they are unable to set up CRIDs in some applications (including IV-MTR).

For general information about BSAs and BSA Delegates, please see the BSA Instructions on PostalPro.

1.4.2.2 IV-MTR

IV-MTR is not part of the core suite of BCG services. This means that users must specifically request or assign access to IV-MTR through the BCG.

- BSAs can enable the service for themselves in the BCG.
- Non-BSA users can be assigned access in two ways, depending on who initiates the action:
    - The non-BSA user can initiate the action by requesting access to IV-MTR in BCG. The request goes to the CRID's BSA (and BSA Delegate(s), as applicable), who approve or deny the request and assign an IV-MTR user level
    - The BSA and/or BSA Delegate can initiate the action by selecting a user, granting them access to IV-MTR, and assigning them an IV-MTR user level

The IV-MTR business service uses the BCG user levels as a starting point for access control. By default, a user's IV-MTR user level matches their BCG user level. An IV-MTR user level can be updated at any time by a BSA or BSA Delegate without impacting the user's overall BCG user level. The five IV-MTR user levels are provided in the table below.

Table 1.3. IV-MTR User Levels

MTR User	Access Description
BSA	Manager of CRID. Has highest level of access and is in charge of granting other users access to CRID. Can view all data and complete all actions for CRID.
BSA Delegate	User who has been granted BSA powers for CRID, but is not the actual BSA. Can view all data and complete all actions for CRID.
General User	User who has regular, non-administrative access for CRID. Can view all data for CRID, but cannot complete all actions.
General User with Role(s) and/or Permission(s)*	Non-administrative users who can view all data for CRID and have been granted permission to complete specific actions for CRID in IV-MTR. (see Roles and Permissions section below)
No Access	User who has no access for CRID
*This user level displays in the BCG as a general user, as roles and permissions are assigned within the IV-MTR application itself. See the next section.	

1.4.2.2.1 IV-MTR Roles and Permissions

The final level of access control is within the IV-MTR application itself. Certain actions, in addition to general administration, are restricted to administrative-level users by default. These actions include:

- Creating recurring data feeds
- Setting up servers to receive data
- Granting other organizations/CRIDs visibility to your CRID's data
- Creating CRID-wide templates for requesting data

IV-MTR allows BSAs and BSA Delegates to grant general users permission to complete these actions. These are known as Roles and Permissions. Roles and Permissions can be granted in two ways:

1. **Enterprise-level:** roles and permissions granted on a per-CRID basis to all users of that CRID

2. **User-level:** roles and permissions granted on a per-user basis to all the CRIDs a particular user has access to

Detailed information about IV-MTR Roles and Permissions can be found in Section 11: *Roles and Permissions*.

1.4.3 Sharing Data with Other Organizations

The IV-MTR application allows you to share and receive data with other CRIDs and organizations using a feature called *data delegation*. This is useful for many situations, including:

- When your organization has multiple CRIDs or MIDs and you want to track all the data in one place
- When you want to share your mail data with an outside organization (such as a Mail Service Provider (MSP))
- When your customers ask your organization to manage their tracking data for them

With data delegation, the CRID or MID sharing its data is known as the *delegator*. The CRID or MID that receives the data is known as the *receiver*.

Data can be shared at the CRID- or MID-level for scan data and at the CRID level for pass-through data.

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 Section 9*: Data Delegation*.

However, if one or both of the organizations do not wish to set the delegation up themselves, the IV Solutions Center can help facilitate the delegation. In some cases, it is also possible to share your data without creating an IV-MTR account. See the next section for details.

1.4.4 Do I Need an IV-MTR Account?

An IV-MTR account allows you to request and view mail tracking and pass-through data. It also allows you to control who can see your data and to share your data with another organization or CRID.

However, if you are only interested in sharing your data with another organization (such as an MSP), it may not be necessary to create an IV-MTR account. Contact the IV Solutions Center for more details.

2 Prerequisites for Receiving Tracking Data

This section provides information about the requirements for mail tracking visibility.

- Section 2.1 explains the requirements that must be met for the Postal Service to provide tracking data.
- Section 2.2 describes which CRIDs and MIDs are able to receive tracking data without data delegation.
- Section 2.3 describes how roles and permissions can affect an individual's visibility of tracking data.

2.1 Visibility Requirements for Mail Objects

Visibility in IV-MTR is limited to mail objects with:

- Intelligent Mail barcodes (IMb)
- Intelligent Mail tray barcodes (IMtb)
- Intelligent Mail container barcodes (IMcb)

In a future release, bundle visibility will be expanded to include saturation mail and Every Door Direct Mail™ (EDDM), which utilize simplified addressing.

Visibility may be provided if the mailpiece is not eligible for Full-Service or if the mailpiece is residual or Reply Mail. The following table provides definitions of these terms as used in IV-MTR.

Table 2.1: Definitions of Visibility Requirement Terms

Term	IV-MTR Definition
Full-Service*	Mailpiece associated to electronic documentation (eDoc)† and paid at the Full-Service rate
not eligible for Full-Service	Mailpiece associated to an eDoc and has a rate category that is not eligible for Full-Service
residual mail	Mailpiece eligible for Full-Service but was not paid at the Full-Service rate
Reply Mail	Mailpiece has an IMb that uses a Reply Mail Service Type Identifier (STID)
* For more information about Full Service, please see the Full Service Fact Sheets PostalPro page † For more information about eDoc, see the eDoc PostalPro page	

In some cases, visibility requires that a mail object be Full-Service Intelligent Mail® if eligible for Full-Service. Full-Service Intelligent Mail requires:

1. Unique Intelligent Mail barcodes on mailpieces, handling units, and containers;
2. Electronic documentation; and
3. The use of Facility Access and Shipment Tracking (FAST®) to schedule appointments for entry drop-ship mailings and all mailer-transported, origin-entered mail verified at a Detached Mail Unit (DMU).

For more information about Full-Service, see the Mailing Services page on PostalPro.

Visibility also depends on the mail object type, handling event type, and CRID or MID role. The CRID or MID role is defined for a specific mailing or mail object by the eDoc or barcode. For the business rules used to identify each CRID or MID role, see Appendix H: *CRID and MID Role Identification*. The following table provides the visibility requirements for each mail object type, handling event type, and CRID or MID role.

Table 2.2: Visibility Requirements by Mail Object and Handling Event Type

<table>
<tr><th>Mail Object</th><th>Actual Handling Event</th><th>Assumed Handling Event†</th><th>Logical Handling Event</th></tr>
<tr><td>Pieces (letters and flats)</td><td>• Visibility provided to MID on Piece and Mail Owner* (Full-Service not required)
• Note: For IMb-barcoded pieces that use the Reply Mail ZIP construct, IV-MTR provides visibility to the CRIDs who have that routing code associated to them.</td><td colspan="2">• Visibility provided to MID on Piece and Mail Owner* if piece is:
○ Full-Service OR
○ Not eligible for Full-Service OR
○ Residual mail‡ OR
○ Reply Mail OR
○ Single-Piece rate
• Note: For IMb-barcoded pieces that use the Reply Mail ZIP construct, IV-MTR provides visibility to the CRIDs who have that routing code associated to them.</td></tr>
<tr><td>Bundles</td><td>• Visibility provided to MID on Piece and Mail Owner* of pieces within a bundle (Full-Service not required)</td><td colspan="2">• Visibility provided to MID on Piece and Mail Owner* of pieces within a bundle when at least one of their pieces within the bundle is:
○ Full-Service OR
○ Not eligible for Full-Service OR
○ Residual mail‡ OR
○ Reply Mail OR
○ Single-Piece rate</td></tr>
<tr><td>Handling units</td><td colspan="3">• Visibility provided to Mail Owner, Mail Preparer*, and MID on Piece of pieces within a handling unit when at least one of their pieces within the handling unit is:
○ Full-Service OR
○ Not eligible for Full-Service OR
○ Residual mail‡ OR
○ Reply Mail OR
○ Single-Piece rate
• Visibility provided to eDoc Submitter* and MID on Tray when at least one of the pieces within the handling unit is:
○ Full-Service OR
○ Not eligible for Full-Service OR
○ Residual mail‡ OR
○ Reply Mail OR
○ Single-Piece rate</td></tr>
</table>

Mail Object	Actual Handling Event	Assumed Handling Event†	Logical Handling Event
Containers	• Visibility provided to Mail Owner, Mail Preparer*, and MID on Piece of pieces within a container when at least one of their pieces within the container is: ○ Full-Service OR ○ Not eligible for Full-Service OR ○ Residual mail‡ OR ○ Reply Mail OR ○ Single-Piece rate • Visibility provided to eDoc Submitter*, MID on Container, and FAST Scheduler for appointment associated to container when at least one of the pieces within the container is: ○ Full-Service OR ○ Not eligible for Full-Service OR ○ Residual mail‡ OR ○ Reply Mail OR ○ Single-Piece rate		

** eDoc is required to determine if pieces within a container, handling unit, or bundle are Full-Service or eligible for Full-Service as well as determine the Mail Owner, Mail Preparer, and eDoc Submitter of the pieces.*

† Assumed handling events are dependent upon mailer eDocs (Mail.dat® or Mail.XML eDoc) for mailer containers, handling units, and bundles as well as Postal Service nesting information for Postal Service containers and handling units.

‡ Visibility of residual mail is only provided if the eDoc Submitter CRID had at least one month in the past three months in which 95% or higher of their Full-Service eligible pieces were mailed as Full-Service. ***NOTE: This requirement is temporarily on hold. Therefore, IV-MTR provisions handling events for residual mail when able to generate the events. No data is suppressed.***

For data feeds in the IV-MTR application, recipient role data fields are available for handling events in the delimited and JavaScript Object Notation (JSON) file formats. These fields provide information about which CRID or MID role and CRID number(s) provided visibility of a particular handling event. The following are the available recipient role data fields. For additional information about these fields, see the *IV-MTR External Facing Data Dictionary*:

- *Recipient Mail Owner CRID*
- *Recipient Mail Owner Delegator CRID*
- *Recipient Mail Preparer CRID*
- *Recipient Mail Preparer Delegator CRID*
- *Recipient CRID of MID on Container*
- *Recipient CRID of MID on Container Delegator*
- *Recipient CRID of MID on Tray*
- *Recipient CRID of MID on Tray Delegator*
- *Recipient CRID of MID on Piece*
- *Recipient CRID of MID on Piece Delegator*
- *Recipient eDoc Submitter CRID*
- *Recipient eDoc Submitter Delegator CRID*
- *Recipient FAST Scheduler CRID*
- *Recipient FAST Scheduler Delegator CRID*
- *Recipient Routing Code Authorized CRID*

2.1.1 Postal Wizard Mailings

Currently, Postal Wizard mailings are not supported by the IV-MTR application. Mailers using Postal Wizard are able to receive Raw Scans (Actual Scans) for physical mailpieces that receive a scan.

However, they are unable to receive Enriched Scans (Assumed & Logical Scans) or track scans by Job ID.

If you would like to receive enriched scan data or track your mailings by Job ID, IV-MTR supports eDoc submission via either Mail.dat or Mail.xml. For further information about Postal Wizard, Mail.dat, or Mail.xml set up, contact the PostalOne! Help Desk. For questions about visibility in IV-MTR, contact the IV Solutions Center.

2.2 Default Permissions

Default permissions for viewing data, managing data feeds, and managing data delegation depend on the role your CRID or MID has for a mailing or mail object. The CRID or MID role is defined for a specific mailing or mail object by the eDoc or barcode. For the business rules used to identify each CRID or MID role, see Appendix H: *CRID and MID Role Identification*.

The CRID or MID roles and their default permissions are described in the following table. The table shows which CRID or MID roles can view data, manage data feeds, and manage data delegation for each mail object type. Visibility for a particular mail object type includes visibility for actual, assumed, and logical handling events.

Table 2.3: Default Permissions by CRID or MID Role

CRID or MID Role	Able to View or Receive Data For				Able to Share Data For			
	Container	*Handling Unit*	*Bundle*	*Piece*	*Container*	*Handling Unit*	*Bundle*	*Piece*
Mail Owner	X	X	X	X	X	X		
Mail Preparer	X	X			X	X		
eDoc Submitter	X	X			X	X		
FAST Scheduler	X				X			
MID on Piece	X	X	X	X	X	X	X	X
MID on Tray		X				X		
MID on Container	X				X			
Delegate*	X*	X*	X*	X*				

** A delegate is any CRID or MID to which one of the other CRID or MID roles has delegated visibility data. The Delegating Party selects which mail objects types the Receiving Party is able to view/receive data for.*

Note: *To manage data feeds, a user must be the IV-MTR BSA, a BSA Delegate, or a Subscription Manager for the subscription owner CRID. To manage data delegations, a user must be the IV-MTR BSA, a BSA Delegate, or a Data Delegation Manager for the CRID.*

Visibility for a CRID or MID is cumulative. The following are some examples:

- If the same CRID or MID has been used to identify more than one role, the permissions are cumulative for that CRID or MID. For example, a user who has visibility of a MID that was used to identify the Mail Owner on a piece can see the container or handling unit that contains that piece. If that MID was also used to identify the MID on Piece, a user who has visibility of that MID can view bundle and piece data as well.
- If a MID is used to define a role, and the CRID that MID belongs to was used to define another role, users with visibility of the CRID will have cumulative permissions. For example, if a MID is identified as the MID on Piece and the CRID that the MID belongs to is identified as the Mail Preparer, users who have permissions for that CRID can view and delegate data for containers, handling units, bundles, and pieces.

2.3 Individual Permissions

In addition, an individual's permissions determine visibility within IV-MTR. Visibility permissions are at the CRID, MID, or routing code level.

CRID-level visibility allows a user to see the following:

- Data that belongs to that CRID
- Data belonging to any MIDs that fall under that CRID
- Data that is delegated to that CRID*
- Data that is delegated to any MIDs that fall under that CRID*
- Data for routing codes that are associated to that CRID

***** *When data is delegated, the delegating party can choose to limit visibility of data based on mail object type, handling event type, custom filter, and data fields.*

MID-level visibility allows a user to see the following:

- Data that belongs to that MID
- Data that is delegated to that MID*

***** *When data is delegated, the delegating party can choose to limit visibility of data based on mail object type, handling event type, custom filter, and data fields.*

Routing code visibility allows a user to see data for a particular routing code.

When a user receives the IV-MTR service for a CRID, the user has visibility at the CRID level initially. The IV-MTR BSA, a BSA Delegate, or a Roles and Permissions Manager for the CRID can customize the individual visibility permissions for that user. Visibility permissions can be customized such that an individual may only receive visibility for specific CRIDs, MIDs, and/or routing codes as well as mail object types and handling event types.

An individual’s visibility of data depends on 1) the CRID or MID used to identify the CRID or MID role and 2) whether the user has visibility of the MID or the entire CRID (which that MID falls under). For example:

- If a user has CRID-level visibility, the user has visibility of all mail tracking data where *that* CRID was used to determine the CRID or MID role (e.g., Mail Owner). In addition, that user has visibility of all mail tracking data where a MID *belonging to that CRID* was used to determine the CRID or MID role.
- If a user has MID-level visibility but not CRID-level visibility, the user has visibility of all mail tracking data where *that* MID was used to determine the CRID or MID role (e.g., Mail Owner). However, because the user does **not** have visibility of the CRID *to which that MID belongs*, the user does **not** have visibility of mail tracking data where *that* CRID was used to determine the CRID or MID role.

3 Data Provisioning Options

IV-MTR provides multiple options for provisioning (delivering) your data. You can choose the:

1. Query Type (One-Time Query or Data Feed)
2. Delivery Methods
3. File Formats (including data fields)
4. Scan Enrichment Type

Information about each of these options is provided in the following sections.

3.1 One-Time Query or Data Feed

A **one-time query** is a one-time (ad hoc) search for a particular set of records. With a one-time query, you can:

- Receive data for:
  - Scan events
  - IDPC Detailed records
- Specify the dates you want to receive records for, including dates in the past
  - Data is available for the past 120 days
- Choose from three options for receiving data:
  - online viewer
  - downloadable file
  - file sent to your server

Any IV-MTR user can complete a one-time query.

A **data feed** is a recurring search (subscription) that provides results at a specified interval. With a data feed, you can:

- Receive data for:
  - Scan events
  - EPS
  - IDPC Detailed records
  - PPC
  - MQD
- Automatically receive specified data from time of set up forward
  - Historical data unavailable with this method
- Choose from two options for receiving data:
  - downloadable file
  - file sent to your server or web service

Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can create a data feed.

The delivery methods, field customizations, and file formats vary between the two provisioning options. See the next sections for more details.

Instructions for completing one-time queries and data feeds are provided in Sections 7: *One-Time Queries* and 8: *Data Feeds*.

3.2 Delivery Methods

Different delivery methods are available for one-time queries and data feeds. The available options are provided in the table below.

Table 3.1: IV-MTR Delivery Methods

Delivery Method	Description	One-Time Query	Data Feed
Online View	The application displays the query results online. • For unlinked mail objects, results display in a table that can be exported • For linked mail objects, results display in the Mail Object Navigator, which allows you to view handling events for containers and drill down to view handling units nested to a specific container.	X	
Online Download	The application creates a file or files and displays them in an output history, from which you can then download the file(s)	X	X
Send to SFTP Server	The application creates a file or files and pushes them to your selected server via Secure File Transfer Protocol (SFTP)	X	X
Send to Web Service	The application pushes data to your web service, or your web service pulls data from the application	X* *Pull Only*	X *Push only*

*Mail.XML pull messages function as one-time queries in that they are ad hoc messages. However, they are configured through the user's web service – *not* through the IV-MTR application – and therefore do not follow the same guidelines as in-app one-time queries.

The selected delivery method determines which file formats are available. IV-MTR provides multiple file format options. See the following section for additional information.

3.3 File Formats

Data can be exported in the following file formats:

1. Online view with option to export as Comma Separated Value (CSV) or Portable Data File (PDF)
2. IMb Tracing legacy PKG
3. Delimited (TXT)
4. Mail.XML
5. JSON

The file formats and mail object types available for your query vary based on the type of query (one-time query or data feed) and the delivery method you chose. Detailed information about each of the file formats is provided in the following sections.

An overview of the file formats and mail object types for one-time queries are provided in the table below.

Table 3.2: One-Time Query File Formats by Delivery Method

Delivery Method	File Format	Mail Object Types			
		Container	*Handling Unit*	*Bundle**	*Piece**
Online View	Displays in an Online View with option to export as CSV or PDF	X	X		
Online Download	IMb Tracing Legacy PKG File				X
	Delimited (TXT) File	X	X	X	X
Send to SFTP Server	IMb Tracing Legacy PKG File				X
	Delimited (TXT) File	X	X	X	X
Send to Web Service†	Mail.XML Messages† *(PULL only)*	X	X		

** Bundle- and piece-level data are not available through Online View for a one-time query at this time.*

† Mail.XML pull messages function as one-time queries in that they are ad hoc messages. However, they are configured through the user's web service – not through the IV-MTR application – and therefore do not follow the same guidelines as in-app one-time queries.

An overview of the file formats and mail object types for data feeds are provided in the table below.

Table 3.3: Data Feed File Formats by Delivery Method

Delivery Method	File Format	Mail Object Type			
		Container	*Handling Unit*	*Bundle*	*Piece*
Online Download	IMb Tracing Legacy PKG File				X
	Delimited (TXT) File	X	X	X	X
	Mail.XML Messages *(PUSH only)*	X	X		
	JSON File *(PUSH only)*	X	X	X	X
Send to SFTP Server	IMb Tracing Legacy PKG File				X
	Delimited (TXT) File	X	X	X	X
	JSON File *(PUSH only)*	X	X	X	X
Send to Web Service	Mail.XML Messages *(PUSH only)*	X	X		
	JSON File *(PUSH only)*	X	X	X	X

Note: The legacy *PostalOne!* Informed Visibility Download File Format is not available in IV-MTR. However, you can create a similar file for download with the delimited format. See Appendix G: *Legacy PostalOne! Informed Visibility Download File Format* for additional information

The characteristics of each file format depend on whether it is for a one-time query or data feed as well as the delivery method. The following table provides the characteristics of each file format.

Table 3.4: File Format Characteristics

	ONE-TIME QUERY								DATA FEED							
Delivery Method	**Online View**			**Download**		**Send to Address**		**Pull§**	**Download**				**Send to Address**			
File Format	***Online View***	***PDF***	***CSV Export***	***Delimited***	***PKG***	***Delimited***	***PKG***	***Mail.XML§***	***Delimited***	***PKG***	***Mail.XML***	***JSON***	***Delimited***	***PKG***	***Mail.XML***	***JSON***
Push or Pull	Push	Push	Push	Push	Push	Push	n/a	Pull	Push	Push	Push	Push	Push	Push	Push	Push
File Extension	n/a	PDF	CSV	TXT	PKG	TXT	n/a	XML	TXT	PKG	XML	JSON	TXT	PKG	XML	JSON
Mail Object Types Available	Container Handling unit*	Container Handling unit*	Container Handling unit*	Container Handling unit Bundle Piece	Piece	Container Handling unit Bundle Piece	Piece	Container Handling unit	Container Handling unit Bundle Piece	Piece	Container Handling unit	Container Handling unit Bundle Piece	Container Handling unit Bundle Piece	Piece	Container Handling unit	Container Handling unit Bundle Piece
Compression	n/a	n/a	n/a	Always zipped	Always zipped	Option for zipped or unzipped	Option for zipped or unzipped	n/a	Option for zipped or unzipped but file(s) are always zipped	Option for zipped or unzipped but file(s) are always zipped	Always zipped	Option for zipped or unzipped but file(s) are always zipped	Option for zipped or unzipped	Option for zipped or unzipped	n/a	Option for zipped or unzipped
File Naming Convention	n/a	download.pdf	download.csv	YYYYMMDDHHmmss_AA_BBBB_CCCC.txt†	fsbXXXXXXX.pkg‡	YYYYMMDDHHmmss_AA_BBBB_CCCC.txt†	fsbXXXXXXX.pkg‡	YYYYMMDDHHmmss_AA_BBBB_CCCC.xml†	YYYYMMDDHHmmss_AA_BBBB_CCCC.txt†	fsbXXXXXXX.pkg‡	YYYYMMDDHHmmss_AA_BBBB_CCCC.xml†	YYYYMMDDHHmmss_AA_BBBB_CCCC.json†	YYYYMMDDHHmmss_AA_BBBB_CCCC.txt†	fsbXXXXXXX.pkg‡	YYYYMMDDHHmmss_AA_BBBB_CCCC.xml†	YYYYMMDDHHmmss_AA_BBBB_CCCC.json†
Example File Name	n/a	download.pdf	download.csv	20161207112728_CS_2XY4_0001.txt†	fsbbda0113.pkg‡	20161207112728_CS_2XY4_0001.txt†	fsbbda0113.pkg‡	20161207112728_CS_2XY4_0001.xml†	20161207112728_CS_2XY4_0001.txt†	fsbbda0113.pkg‡	20161207112728_CS_2XY4_0001.xml†	20170616150100_PS_141U_0001.json†	20161207112728_CS_2XY4_0001.txt†	fsbbda0113.pkg‡	20161207112728_CS_2XY4_0001.xml†	20170616150100_PS_141U_0001.json†
Column Headers Included	Yes	Yes	Yes	Yes	No	Yes	No	n/a	Yes	No	n/a	n/a	Yes	No	n/a	n/a
End of Line Character	n/a	n/a	Line feed (LF) "\n"	Line feed (LF) "\n"	Carriage return line feed (CRLF) "\r\n"	Line feed (LF) "\n"	Carriage return line feed (CRLF) "\r\n"	n/a	Line feed (LF) "\n"	Carriage return line feed (CRLF) "\r\n"	n/a	n/a	Line feed (LF) "\n"	Carriage return line feed (CRLF) "\r\n"	n/a	n/a
Escape Character	n/a	n/a	"\"	"\"	n/a	"\"	n/a	n/a	"\"	n/a	n/a	n/a	"\"	n/a	n/a	n/a
Delimiter Character	n/a	n/a	Comma	As selected by user	Comma; also fixed-width	As selected by user	Comma; also fixed-width	n/a	As selected by user	Comma; also fixed-width	n/a	n/a	As selected by user	Comma; also fixed-width	n/a	n/a
Handling of Large Number of Records	Limited to 10,000 most recent records as determined by *Scan DateTime*	Limited to 10,000 most recent records as determined by *Scan DateTime*	Limited to 10,000 most recent records as determined by *Scan DateTime*	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Message group broken into 250 records per message	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Message group broken into 250 records per message	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Multiple files created if more than 100,000 records	Message group broken into 250 records per message	Multiple files created if more than 100,000 records
In-App Notification of Readiness Available	No	No	No	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No

	One-time query								**Data Feed**							
Delivery Method	**Online View**			**Download**		**Send to Address**		**Pull§**	**Download**				**Send to Address**			
File Format	***Online View***	***PDF***	***CSV Export***	***Delimited***	***PKG***	***Delimited***	***PKG***	***Mail.XML§***	***Delimited***	***PKG***	***Mail.XML***	***JSON***	***Delimited***	***PKG***	***Mail.XML***	***JSON***
Displayed in File or Output History (if Records Available)	No	No	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Behavior if No Records	Displays "No Data Found" and export option **not** available	Displays "No Data Found" and export option **not** available	Displays "No Data Found" and export option **not** available	Blank file appears in Output History	Blank file appears in Output History	Blank file sent and appears in Output History; email notification sent if "On Transfer Success" selected	Blank file sent and appears in Output History; email notification sent if "On Transfer Success" selected	*Response* message sent indicating no records	Blank file appears in Output History if the CRID has received scan data in the past; otherwise, a blank file is **not** available	Blank file appears in Output History if the CRID has received scan data in the past; otherwise, a blank file is **not** available	*Delivery* or *Notification* message does **not** appear in Output History	Blank file does **not** appear in Output History	Blank file appears in Output History but is **not** sent; **no** email notification	Blank file appears in Output History but is **not** sent; **no** email notification	*Delivery* or *Notification* message **not** sent and does **not** appear in Output History	Blank file is **not** sent and does **not** appear in Output History

** Bundle- and piece-level data are not available through Online View for a one-time query at this time.*

† For additional information, see Appendix J: Delimited, Mail.XML, and JSON File Naming Convention.

‡ For additional information, see Appendix I: Legacy PKG File Naming Convention.

§ Mail.XML pull messages function as one-time queries in that they are ad hoc messages. However, they are configured through the user's web service – not through the IV-MTR application – and therefore do not follow the same guidelines as in-app one-time queries.

3.3.1 Online View

Online View allows you to view the results of a one-time query without downloading a file. During query setup, you can choose to receive linked or unlinked mail objects. Your choice determines how results will display:

- **Linked Mail Objects** – allows you to view handling events at a container-level, then drill down to nested (linked) handling units and their handling events. The data displays on-screen in the Mail Object Navigator tool. You can export the data as a CSV or PDF if desired.
- **Unlinked Mail Objects** – allows you to view handling events on a one-by-one basis. There are no nesting associations in this method. The data displays on-screen in a table. You can export the data as a CSV or PDF if desired.

Currently, only container and handling unit data is available in Online View. For bundle- or piece-level data, you'll need to choose a different delivery method.

3.3.2 IMb Tracing Legacy PKG File

The legacy PKG file format allows you to receive files in the format used by the retired IMb Tracing system. Legacy PKG files are available for both one-time queries and data feeds. With this file format:

- Only piece-level records are available
- Results are fixed-width and comma-delimited
- All data is included in a package (.PKG) file
- The data fields and their order are not customizable

Legacy PKG format contain the following data fields for a handling (scan) event, in the order they appear:

- *Scan Facility ZIP*
- *Scan Event Code*
- *Scan DateTime*
- *Routing Code (IMb Matching Portion)*
- *IMb Tracking Code*

The position of each field in the fixed-width record and its description are provided in the table below.

Table 3.5: Legacy PKG File Data Fields

Position*	Field	Description
1-5	*Scan Facility ZIP*	5-digit ZIP Code™ of the facility where the mail was processed†
7-9	*Scan Event Code*	Indicates the type of sort operation at which the mail was processed
11-29	*Scan DateTime*	Date (MM/DD/YYYY) and time (hh:mm:ss) the mail was processed
31-41	*Routing Code (IMb Matching Portion)*	Destination ZIP Code of the mailpiece (but only the portion that matches the IMb Routing Code); will be 0, 5, 9, or 11 digits **Note:** Spaces pad this field to the right as needed to fill positions 31-41.
43-62	*IMb Tracking Code*	20-digit tracking code portion of the Intelligent Mail barcode

** Positions 6, 10, 30, and 42 are commas.*

† For a logical delivery event record, the Scan Facility ZIP is the five-digit routing code from the IMb.

The following figure provides a few sample handling event records in the IMb Tracing legacy PKG file format.

```
11256,918,02/23/2016 16:06:37,           ,93270201190102535746
11256,918,02/23/2016 16:06:37,           ,00270201190102535746
10610,919,02/23/2016 16:55:46,109942306  ,00270201190102841081
10199,095,02/23/2016 17:03:31,11222500713,00270201190102844657
29423,919,02/23/2016 17:08:42,29926172902,00270201190104190352
95101,919,02/23/2016 14:38:30,93901      ,00270201190104186070
01546,091,02/23/2016 16:59:06,02081374105,00270201190104190743
01546,091,02/23/2016 16:59:10,02081435323,00270201190104190744
```

Figure 3.1: Example Scans in Legacy IMb Tracing File Format

3.3.3 Delimited (TXT) File

The delimited file format allows you to customize the contents of your file. Delimited files are available for both one-time queries and data feeds. With this file format:

- Piece, bundle, handling unit, and container-level records are available
- All data fields and the order they appear in are customizable
- The delimited character(s) used are customizable
- All data is included in a text (.TXT) file that can be easily imported into Excel if desired (see Appendix F: *Import CSV or TXT File into Microsoft Excel* for more information)

For the complete list of data fields available in the delimited format and their descriptions, please see the *IV-MTR External Facing Data Dictionary.*

Note: The delimited file format uses the standard Unix® text file format in which a file contains one or more lines of text, and each line terminates with a single line feed character (i.e., LF or "\n"). Your system may experience issues if it expects files in the standard Windows®/MS-DOS format. In that format, lines are terminated by both a carriage return and line feed character. Some systems automatically handle this convention, and utilities exist to convert between these formats.

3.3.4 Mail.XML Messages

Mail.XML is an eXtensible Markup Language (XML)-based IDEAlliance® specification for web services. Within the IV-MTR application, Mail.XML messages are only available for data feeds. However, IV-MTR also supports receiving ad hoc Mail.XML messages that function similarly to in-app one-time queries. With this file format:

- Only container and handling unit-level data is available
- The data fields and their order are not customizable
- You can choose to push or pull messages to your web service

An overview of the available Mail.XML messages is provided in the sections below. For full details about Mail.XML support in IV-MTR, please see the *IV-MTR Mail.XML Guide*.

3.3.4.1 Pull Messages

Mail.XML pull messages effectively function as one-time queries in that mailers can use them to retrieve ("pull") container and handling unit visibility data on an ad hoc basis. However, the pull messages are *not* set up through the IV-MTR application, so they do not follow the standard guidelines for IV-MTR one-time queries.

Instead, mailers use a web service Representational State Transfer (REST) client to send a request message invoking the Postal Service web service to pull data in an XML format. The Postal Service returns an XML response message containing the handling event data that matches the request parameters.

IV-MTR currently supports the following Mail.XML pull request and response messages:

- *ContainerVisibilityQueryRequest*: The mailer requests container or handling unit visibility information.
- *ContainerVisibilityQueryResponse*: The application acknowledges the container or handling unit visibility request by providing the available handling event data.
- *StartTheClockQueryRequest*: The mailer requests container Start-the-Clock information.
- *StartTheClockQueryResponse*: The application acknowledges the container Start-the-Clock request by providing the available data.
- *MessageResponseRetrievalRequest*: The mailer requests container or handling unit visibility for the TrackingID provided in the request (used to retrieve batched groups of messages).
- *MessageResponseRetrievalResponse*: The application acknowledges the container or handling unit visibility request by providing the available handling event data for the TrackingID provided in the request.

For additional information about these messages, see the *IV-MTR Mail.XML Guide*.

3.3.4.2 Push Messages

Mail.XML push messages are available for data feeds in the IV-MTR application. With this option, IV-MTR automatically sends ("pushes") XML messages to your web service. There are two kinds of XML messages available:

- Notification messages – alert your web service that new data is available for retrieval
- Delivery messages – send the new data directly to your web service

The specific notification and delivery messages currently supported in the application are:

- *ContainerVisibilityDelivery*: Contains detailed handling event data for containers or handling units matching the subscription.
- *ContainerVisibilityNotification*: Contains notification of available handling event data for containers or handling units.
- *StartTheClockDelivery*: Contains detailed Start-the-Clock data for containers or handling units matching the subscription.

The notification messages that will be supported in a future release include:

- *StartTheClockNotification*: Contains notification of available Start-the-Clock data for containers or handling units.

For additional information about these messages, see the *IV-MTR Mail.XML Guide*.

3.3.5 JSON File

JavaScript Object Notation (JSON) is a lightweight, text-based standard designed for data interchange. In IV-MTR, JSON files are push messages, and available for data feeds only. With this file format:

- Piece, bundle, handling unit, and container-level records are available
- All data fields and the order they appear in are customizable
- All data is included in a JSON (.JSON) file

For the complete list of scan data fields available in the JSON format and their descriptions, please see the *IV-MTR External Facing Data Dictionary.*

3.4 Scan Enrichment

As mail moves through the mailstream, it is scanned by mail processing machines and other scanning devices. The information from these scans (also known as *handling events*) – which includes facility location, processing information, and timestamps – is passed upstream and made available to users through IV-MTR. There are two types of scans available in IV-MTR:

1. Raw scans
2. Enriched scans

The following sections provide information about each scan to help you choose which you would like to receive.

3.4.1 Raw Scans (Actual Scans)

Raw scan data contains only the information from the physical scan of the mailpiece barcode, such as:

- date and time of scan
- facility name
- machine/scanner name
- mail processing phase
- delivery date
- CRID associated to the IMb MID
- the information contained within the IMb itself

Raw scans only provide a status update on the particular barcode that was scanned – if other mailpiece barcodes are connected to that barcode (such as having a nesting association with it), they do not receive the same update. In IV-MTR, this is known as an *actual* scan.

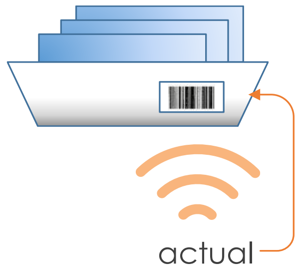


Figure 3.2: Actual Scan Illustration

For a full list of the information available in raw scans, see the fields labeled "raw" in the *IV-MTR External-Facing Data Dictionary*. Note that raw scans are only available at the piece level in IV-MTR.

3.4.2 Enriched Scans (Assumed & Logical Scans)

Enriched scans contain all the information from raw scans, in addition to extra information from the mailing's eDoc and Postal processing information, such as:

- job information (including ID, mail class, and shape)
- nesting associations for trays, bundles, containers, and handling units (both mailer- and Postal-generated)
- data delegation permissions
- Full-Service eligibility
- FAST appointment details

IV-MTR does this by matching raw records to eDoc records. This allows IV-MTR to determine what visibility is available and who has permission to see it. It also allows IV-MTR to assume that the status of one barcode also applies to any other barcode associated with it. For example, if a tray of mail receives an actual scan, IV-MTR can assume that scan to all the mailpieces inside the tray as well. These are known as *assumed actual* scans in IV-MTR.

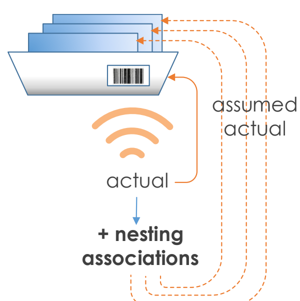


Figure 3.3: Assumed Actual Scan Illustration

In IV-MTR, container, handling unit, and bundle information is only available as enriched scans. Piece-level information is available as either raw or enriched scans.

For a full list of the information available in enriched scans, see the *IV-MTR External-Facing Data Dictionary*.

For more information about logical events, see Appendix E.

3.4.3 Choosing a Scan Type

When setting up a One-Time Query or Data Feed, you choose what types of scans you want to receive. The choices available are dependent on:

- Query Type (one-time query or data feed)
- Scan Level (piece, container, etc.)
- Delivery Method
- File Format

The table below provides a breakdown of the available options.

Table 3.6: Raw and Enriched Handling Events by Delivery Method and File Format

Delivery Method and File Format		Container	Handling Unit	Bundle	Piece
OTQ	Online View	Enriched	Enriched	n/a	n/a
	Download – PKG	n/a	n/a	n/a	Raw
	Download – Delimited	Enriched	Enriched	Enriched	Raw Enriched
	Send to Address – PKG	n/a	n/a	n/a	Raw
	Send to Address – Delimited	Enriched	Enriched	Enriched	Raw Enriched
	Mail.XML Pull	Enriched	Enriched	n/a	n/a
Data Feed	PKG	n/a	n/a	n/a	Raw
	Delimited	Enriched	Enriched	Enriched	Raw Enriched
	Mail.XML Push	Enriched	Enriched	n/a	n/a
	JSON Push	Enriched	Enriched	Enriched	Raw Enriched

When creating piece-level queries or feeds, there are pros and cons to receiving only raw, only enriched, or both raw and enriched handling events. The table below has helpful information to consider when choosing your scan type.

Table 3.7: Pros and Cons of Raw and Enriched Handling Events

	Raw Only	Enriched Only	Raw and Enriched
Pros	Scan data is provisioned as quickly as possible in near real-time	Additional insight into mailings that scans were part of, based on eDoc information	Get the benefits of receiving both raw and enriched data
Cons	Loss of visibility into eDoc-related data fields	May take longer for scans to be provisioned if the eDoc is received late	Each IMb and Scan DateTime will appear twice, once for the raw handling event and once for the enriched handling event. You are responsible for de-duplication of this data.

4 Access the IV-MTR Web Application

The purpose of this section is to provide step-by-step instructions for setting up your IV-MTR account.

Only want to share your mail tracking data?
The IV-MTR application allows you to access and manage mail tracking data for your organization. If your organization would like to delegate its mail tracking information to a third party (such as a mail service provider) instead of directly accessing the tracking information, 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.

4.1 Getting Started

To access the IV-MTR service, you need:

1. A designated BSA
2. Any existing CRID(s) you want access to
3. An existing BCG account
4. IV-MTR privileges (requested and granted through the BCG)

These actions are explained in the following subsections.

4.1.1 Choosing the IV-MTR BSA

Before you begin requesting IV-MTR access, you must decide who the IV-MTR BSA for your CRID will be. The IV-MTR Business Service Administrator (BSA) is responsible for all administrative actions in IV-MTR, including:

- Granting access to other users
- Controlling data visibility
- Managing data delegation
- Managing user roles and permissions
- Removing access for users

Important:

The BCG automatically makes the **first person** to request the IV-MTR service the BSA.

Be sure to coordinate with your team so that the correct person is made the IV-MTR BSA. Note that if someone already has access to IV-MTR for a CRID, then a BSA already exists.

Don’t want to be the IV-MTR BSA?
If you accidentally became the IV-MTR BSA or you no longer want to be the IV-MTR BSA, please contact the IV Solutions Center for assistance.

4.1.2 Choosing Your CRID

Access to IV-MTR is granted on a per-CRID basis, so it is important to understand what CRID you need access to.

If your organization does not have an existing CRID, one will be assigned during registration. You may skip to the next section.

If your organization already has one or more CRIDs, determine which one(s) you need access to before registering.

If you need access to more than one CRID, consult with your team to determine how multiple CRID access is handled in your organization. There are a number of reasons why you may need access to multiple CRIDs - for example, your organization may have multiple business addresses or your company may manage mailpiece data for your customers. In IV-MTR, there are two options for gaining access to multiple CRIDs:

1. Request access to each CRID individually
    a. This requires you to know and/or set up each CRID and add them to your profile
2. Create a central CRID and have other CRIDs delegate their data to the central CRID
    a. This uses the IV-MTR feature of Data Delegation. See Section 9: *Data Delegation* for more details.

Both options require the CRIDs BSA(s)' approval for you to gain access. When applying for access to IV-MTR, make sure you apply for the right CRID(s).

4.1.3 Process Overview

The steps for setting up IV-MTR access vary by role, as shown in the table below.

Table 4.1. IV-MTR Signup Process

If you are the IV-MTR BSA:	If you are not the IV-MTR BSA:
1. Set up a BCG account (if necessary) 2. Add the IV-MTR service 3. Access the IV-MTR application	1. Set up a BCG account (if necessary) 2. Request the IV-MTR service 3. Receive IV-MTR access 4. Access the IV-MTR application

To begin signup, use the table below.

Table 4.2. Applying for IV-MTR Access

IV-MTR BSAs	
If you:	**Begin with:**
Do not have a BCG account,	4.2: *Register as a New User*
Have a BCG account but not the IV-MTR service,	4.3: *Add the IV-MTR Service*
Have the IV-MTR service but have not accessed IV-MTR yet,	0: *Access the* Application
All Other IV-MTR Users	
If you:	**Begin with:**
Do not have a BCG account,	4.2: *Register as a New User*
Have a BCG account but not the IV-MTR service,	4.3: *Add the IV-MTR Service*

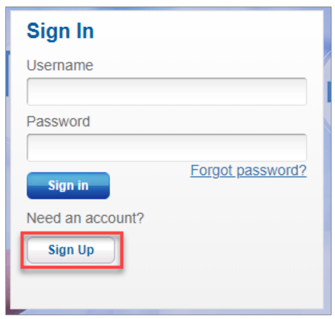
Have been approved for the IV-MTR service, but have not accessed IV-MTR yet,	0: *Access the* Application

4.2 Register as a New User

The BCG is a single-entry point for multiple USPS online business services, including the IV-MTR application. To access the IV-MTR application, you must first have a BCG account.

An overview of the steps to register for a BCG account are as follows. Detailed instructions for each step are provided in the following subsections.

1. Go to https://gateway.usps.com.
2. In the **Sign In** box, click **Sign Up**.



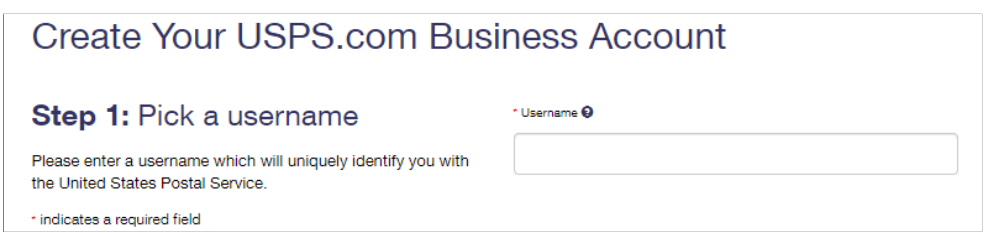
3. On the registration page, pick a username.
4. Enter your security information (i.e., password and security questions).
5. Enter your contact information.
6. Find your company's address by entering the address, ZIP Code, or company identifier (i.e., CRID).
7. Read the privacy policy and click **Create Account**.

Once you have created your BCG account, you need to request the IV-MTR service. See Section 4.3: *Add the IV-MTR Service* for instructions.

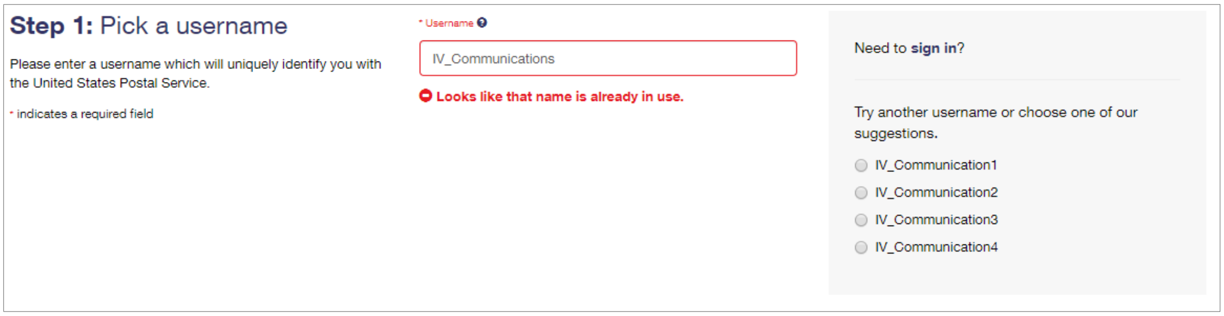
4.2.1 Pick Username

In this area, enter a username. The username must contain at least six characters and may contain special characters. You can use your email address.

Important: Your BCG username is case-sensitive when logging into the BCG or the IV-MTR application.



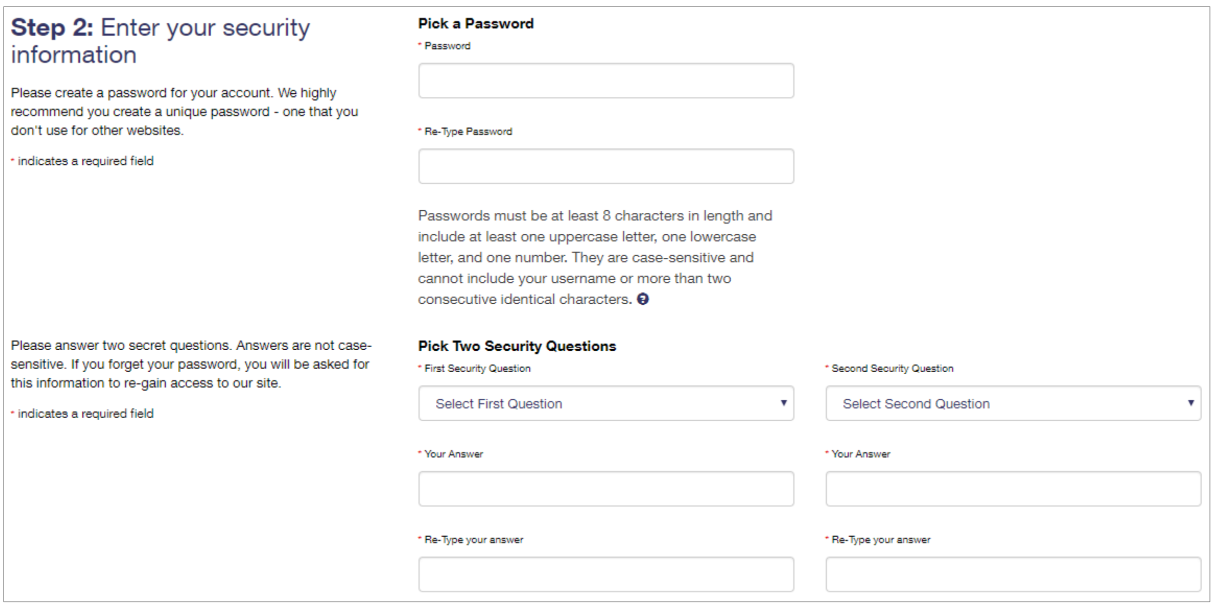
After entering a username, the BCG automatically checks if it is available. If the username is already in use, suggestions are provided to choose from, or you may enter another username of your choice.



When finished, continue to enter your security information.

4.2.2 Enter Security Information

In this area, enter a password and two security questions and answers.



Important: Your BCG password is case-sensitive.

The password must contain:

- at least eight characters
- an uppercase letter
- a lowercase letter
- a number

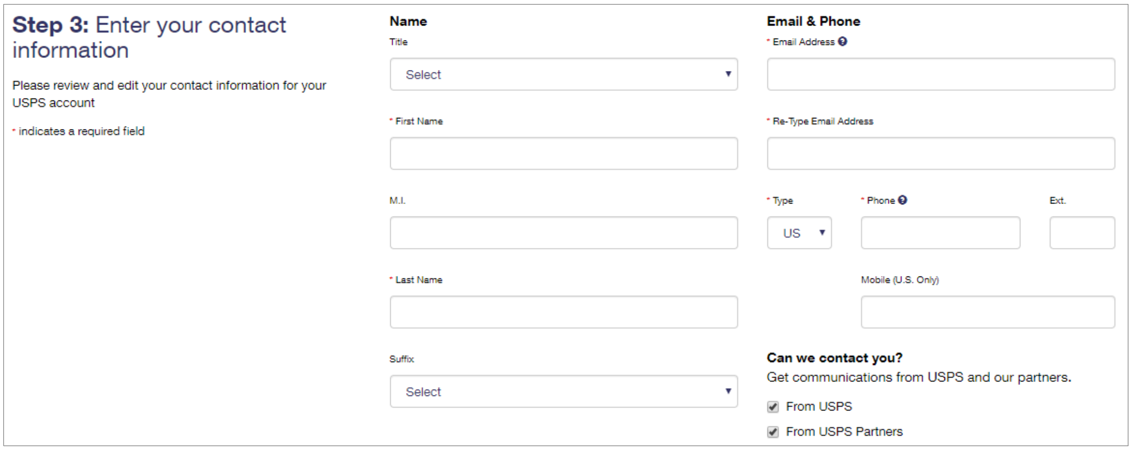
The password cannot include your username or more than two consecutive identical characters.

From the drop-down menus, select two security questions. If you forget your password, you will be asked for the answers to these questions to re-gain access to the site. Once you have selected two security questions, enter the answers in the fields. The answers are not case-sensitive.

When finished, continue to enter your contact information.

4.2.3 Enter Contact Information

In this area, enter your name, phone number, and email address. You may also select whether to receive communications from USPS and our partners.



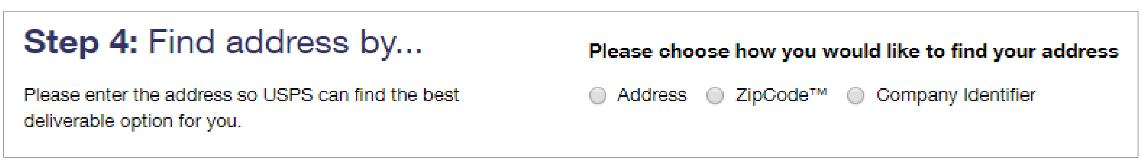
When finished, continue to find your company's address.

4.2.4 Find Address

There are three options for looking up your address:

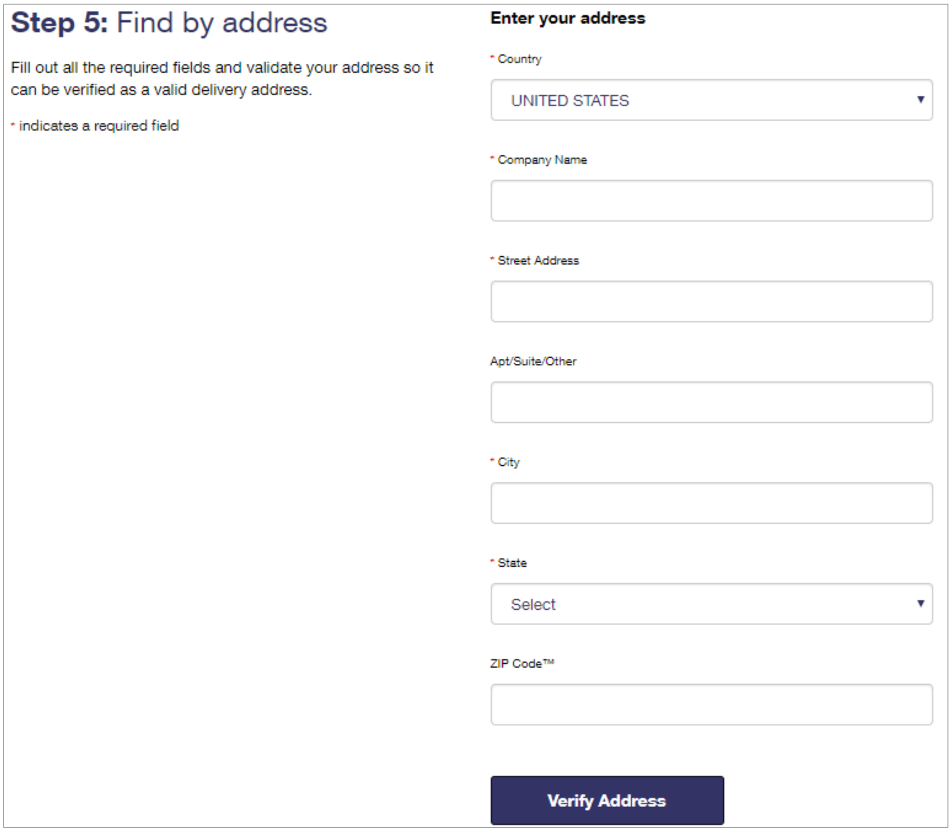
1. By Address
2. By ZIP Code
3. By Customer Identifier (CRID)
    - **Note:** By CRID is the quickest option if you already know your business location's CRID. It will also help ensure you are properly associated to your business location.

The following sections provide instructions for each option.



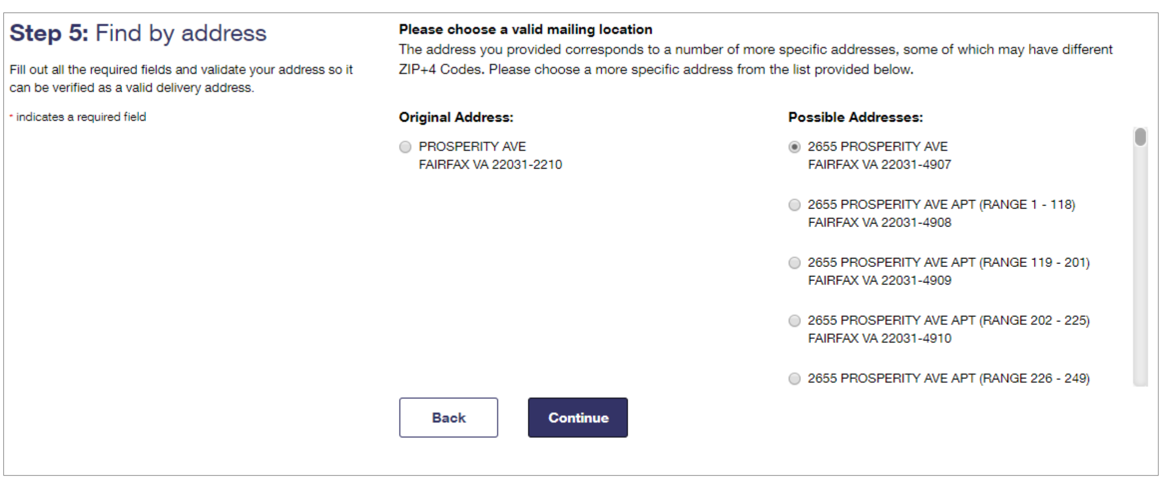
4.2.4.1 By Address

If you selected **Address**, the Find by Address fields appear. Complete the required fields, then click **Verify Address**.

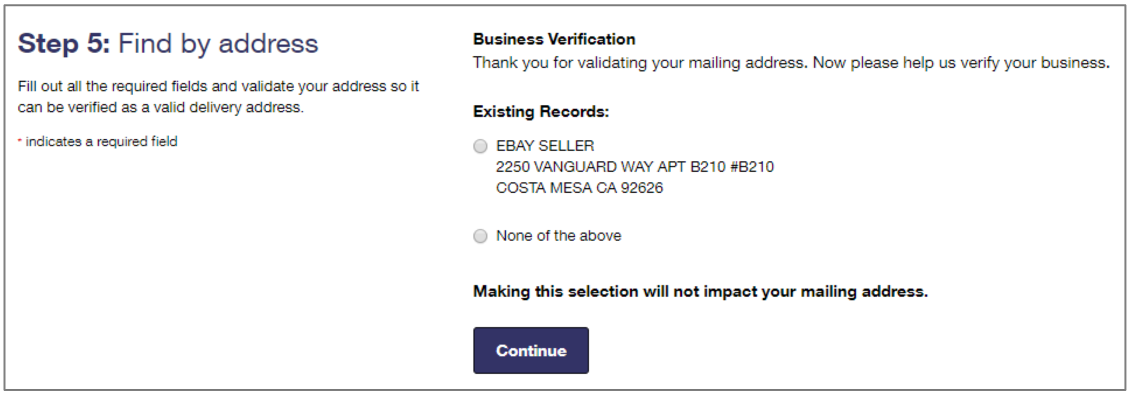


The next screen or screens depend on whether the address and company information entered are recognized by the USPS system:

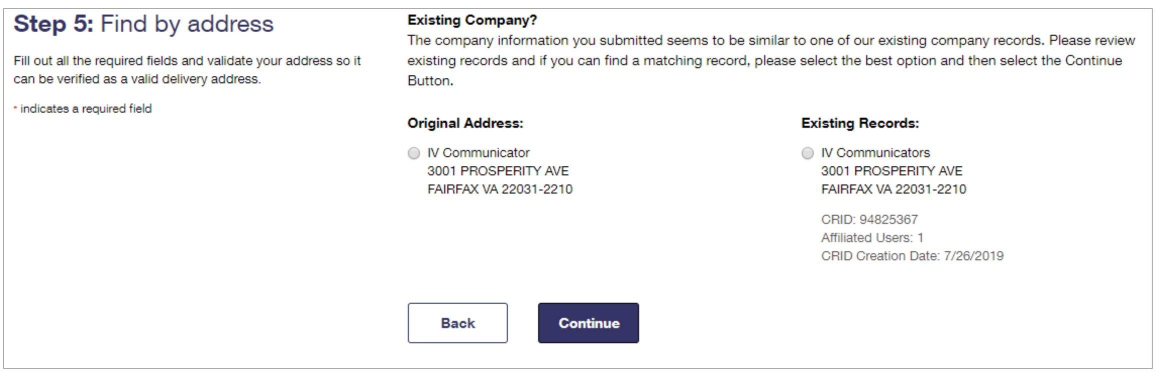
- If USPS does not recognize the entered address, recommended addresses are listed. Select the most accurate address, and then click **Continue**.



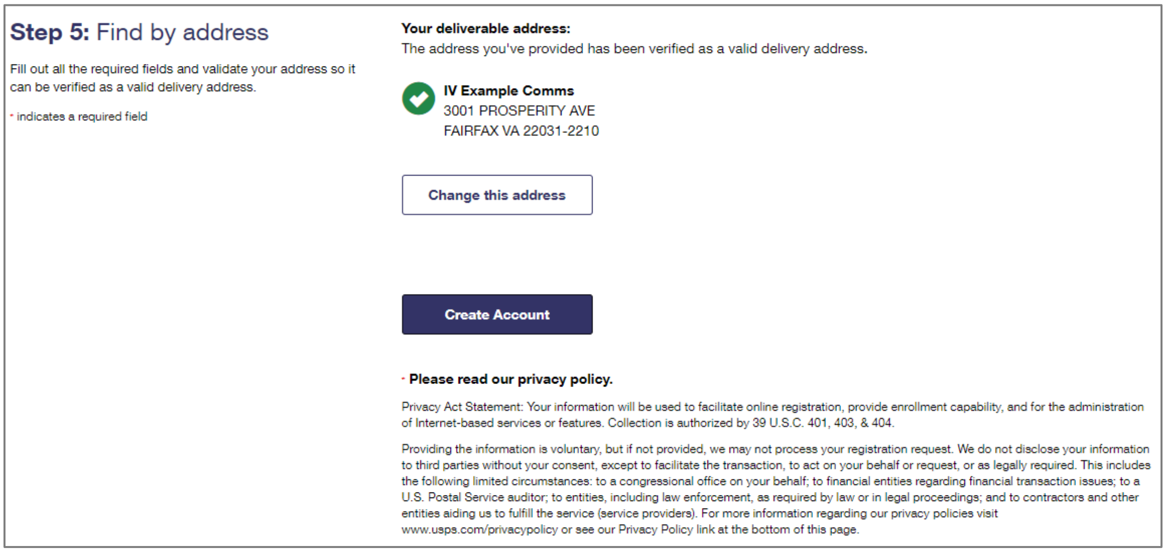
- If the address entered matches a business address already in the USPS system, you are prompted to verify the business. Select the correct business, and then click **Continue**. If the business is not listed, select **None of the above**, and then click **Continue**.



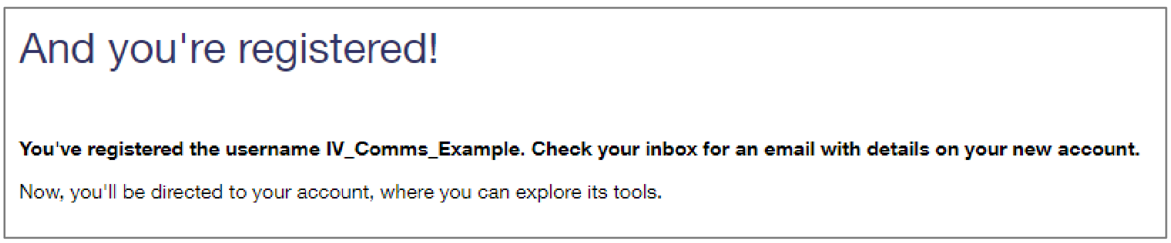
- If the company information is similar to an existing company in the USPS system, you are prompted to confirm whether your company matches the existing record. Select the correct business, and then click **Continue**.



Once you have verified your address, read the privacy policy, and click **Create Account**.



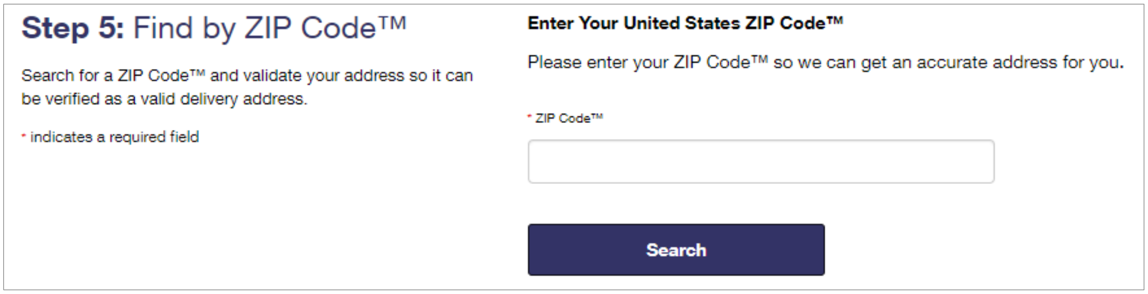
A confirmation screen appears. You also receive an email with details on your new account.



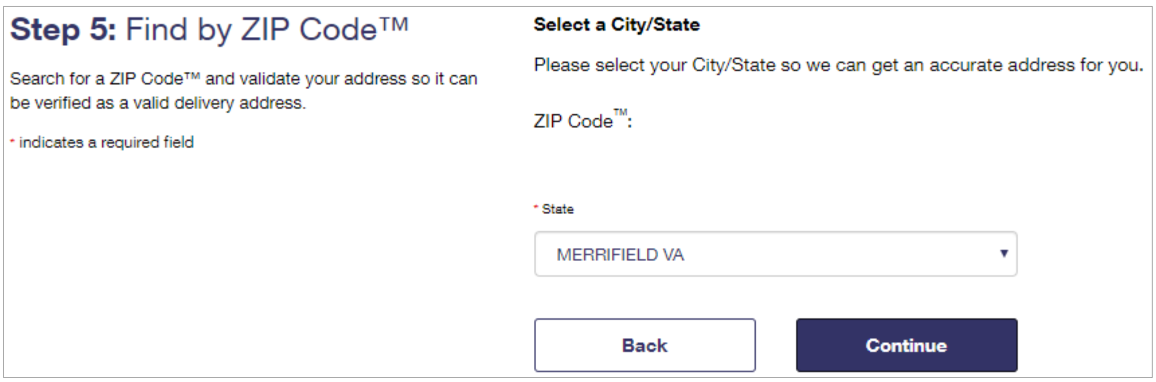
After a few seconds, you are automatically directed to the BCG landing page. Keep the page up and continue to Section 4.3: *Add the IV-MTR Service* to request the IV-MTR service.

4.2.4.2 By ZIP Code

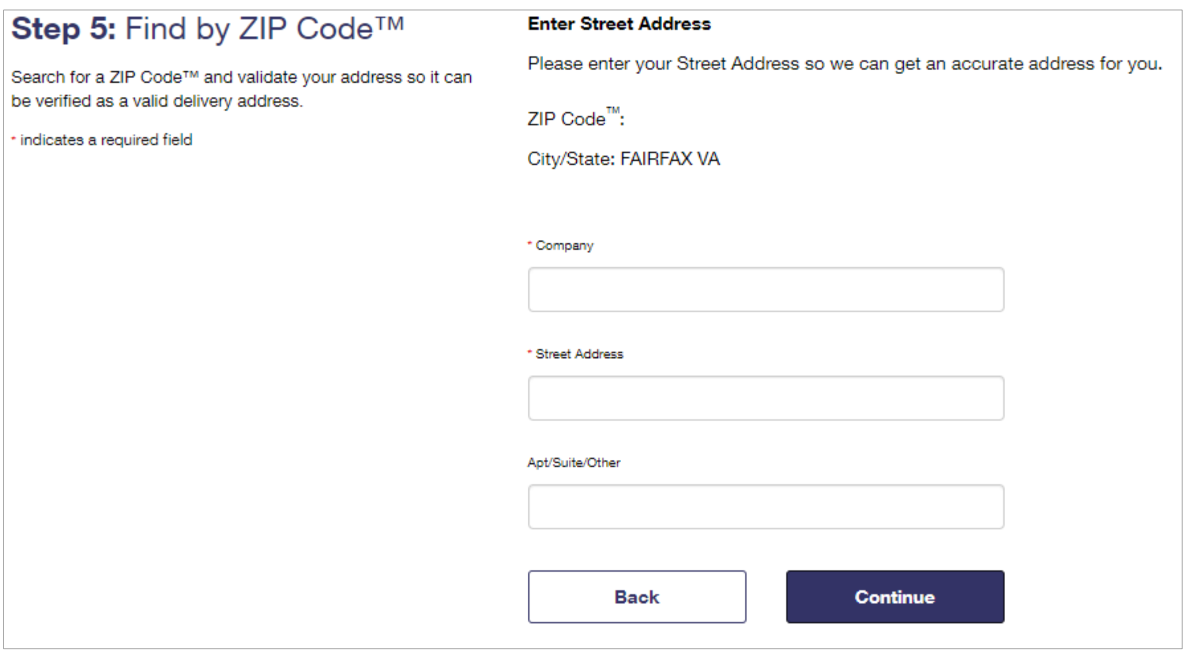
If you selected **ZIP Code**, the Find by ZIP Code fields appear. Enter your business location ZIP Code, and click **Search**.



If prompted, select your city/state, and click **Continue**.

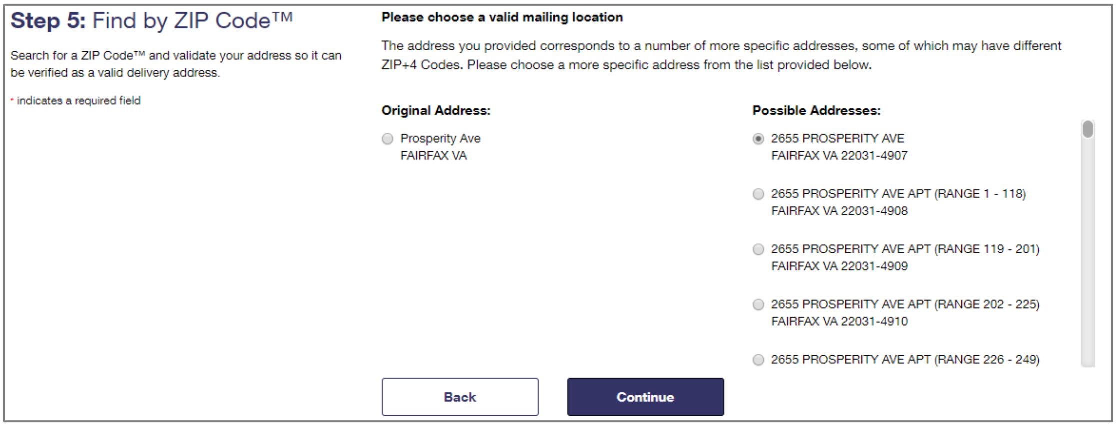


When prompted, enter your company name and street address, and then click **Continue**.

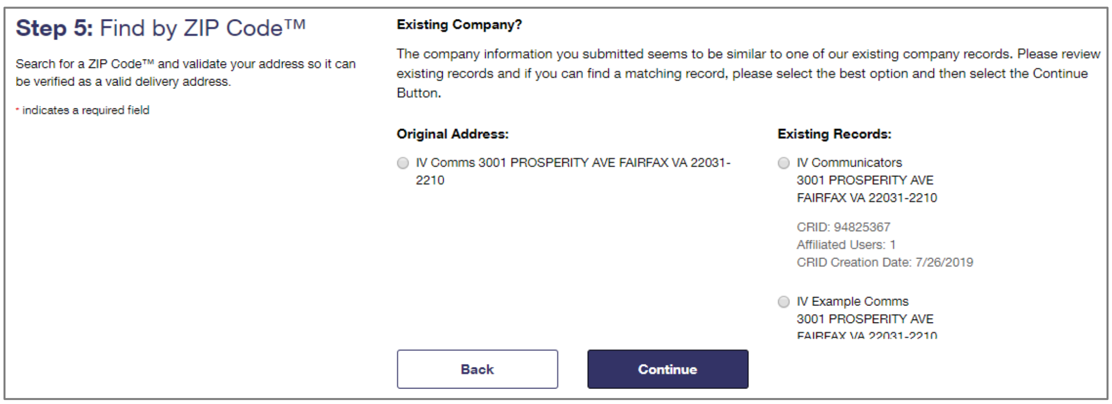


The next screen or screens depend on whether the USPS system recognizes the entered address and company information:

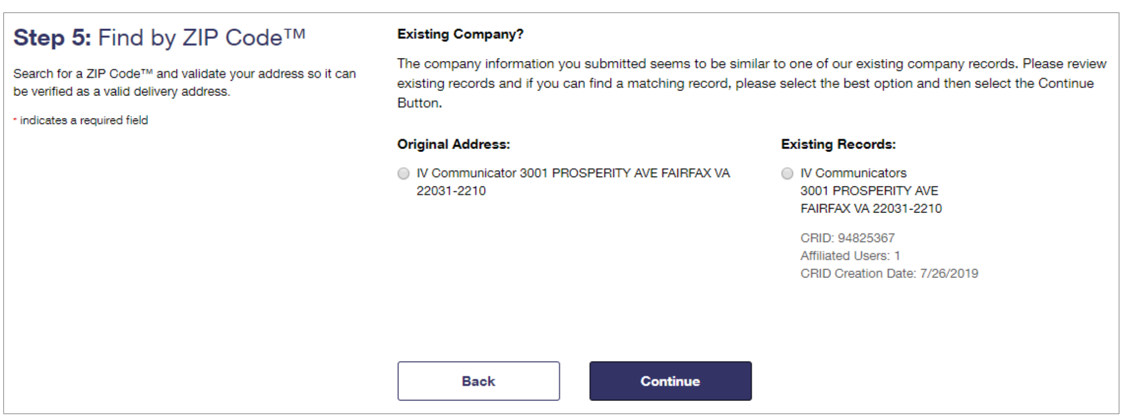
- If USPS does not recognize the entered address, recommended addresses are listed. Select the most accurate address, and then click **Continue**.



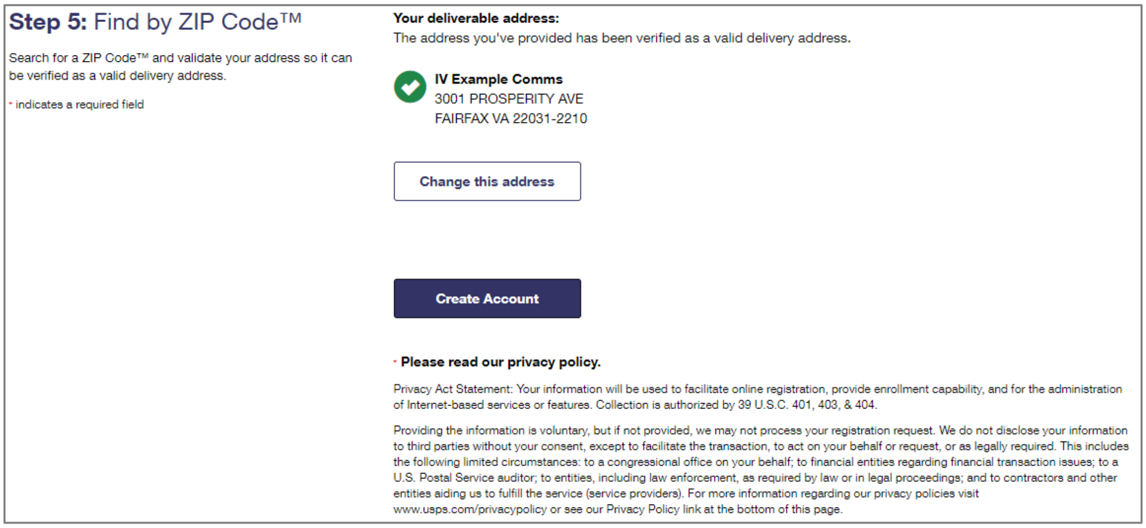
- If the address entered matches a business address already in the USPS system, you are prompted to verify the business. Select the correct business, and then click **Continue**. If the business is not listed, select **None of the above**, and then click **Continue**.



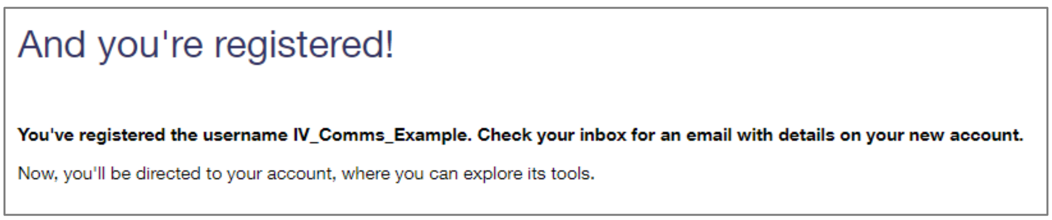
- If the company information is similar to an existing company in the USPS system, you are prompted to confirm whether your company matches the existing record. Select the correct business, and then click **Continue**.



Once you have verified your address, read the privacy policy, and click **Create Account**.



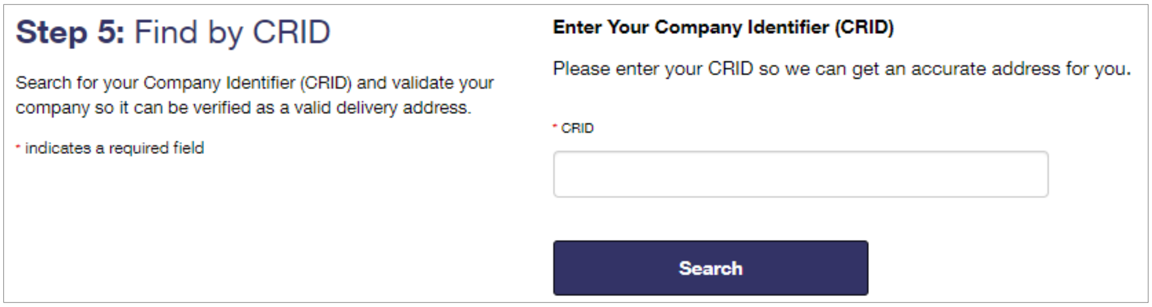
A confirmation screen appears. You also receive an email with details on your new account.



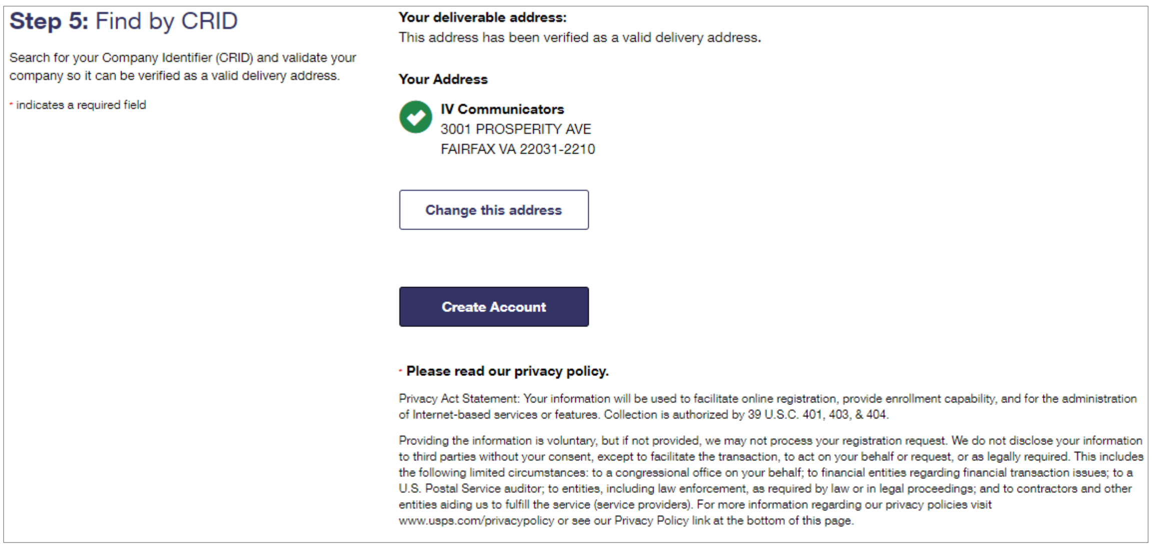
After a few seconds, you are automatically directed to the BCG landing page. Keep the page open and continue to Section 4.3: *Add the IV-MTR Service* to request the IV-MTR service.

4.2.4.3 By Customer Identifier (CRID)

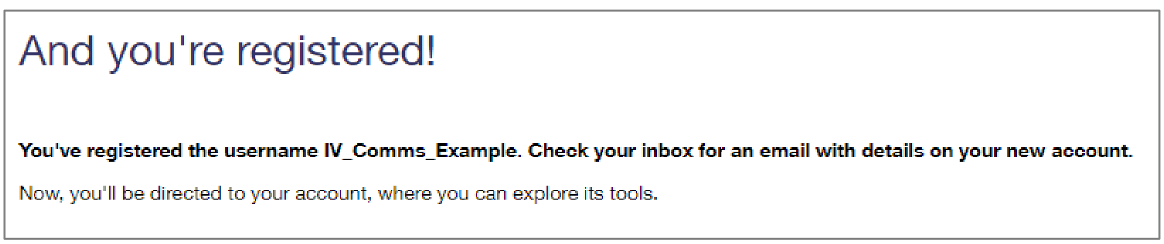
If you selected **Company Identifier**, an additional area appears. Enter your CRID, and click **Find CRID**.



Once you have verified your address, read the privacy policy and click **Create Account**.



A confirmation screen appears. You also receive an email with details on your new account.



After a few seconds, you are automatically directed to the BCG landing page. Keep the page open and continue to Section 4.3: *Add the IV-MTR Service* to request the IV-MTR service.

4.3 Add the IV-MTR Service

Once you have a BCG account, you must request access to the IV-MTR application. Access is requested through the BCG portal.

- If you are the BSA, access will be granted immediately to set up your CRID in IV-MTR.
- If you are not the BSA, your access request will be submitted to the BSA. After the BSA has granted you access, you will receive a notification email.

The steps for requesting IV-MTR access depend on two factors:

1. Whether you are a new BCG user, and
2. Whether your business location (CRID) is new to the BCG.

Use the table below to determine which instructions you should follow:

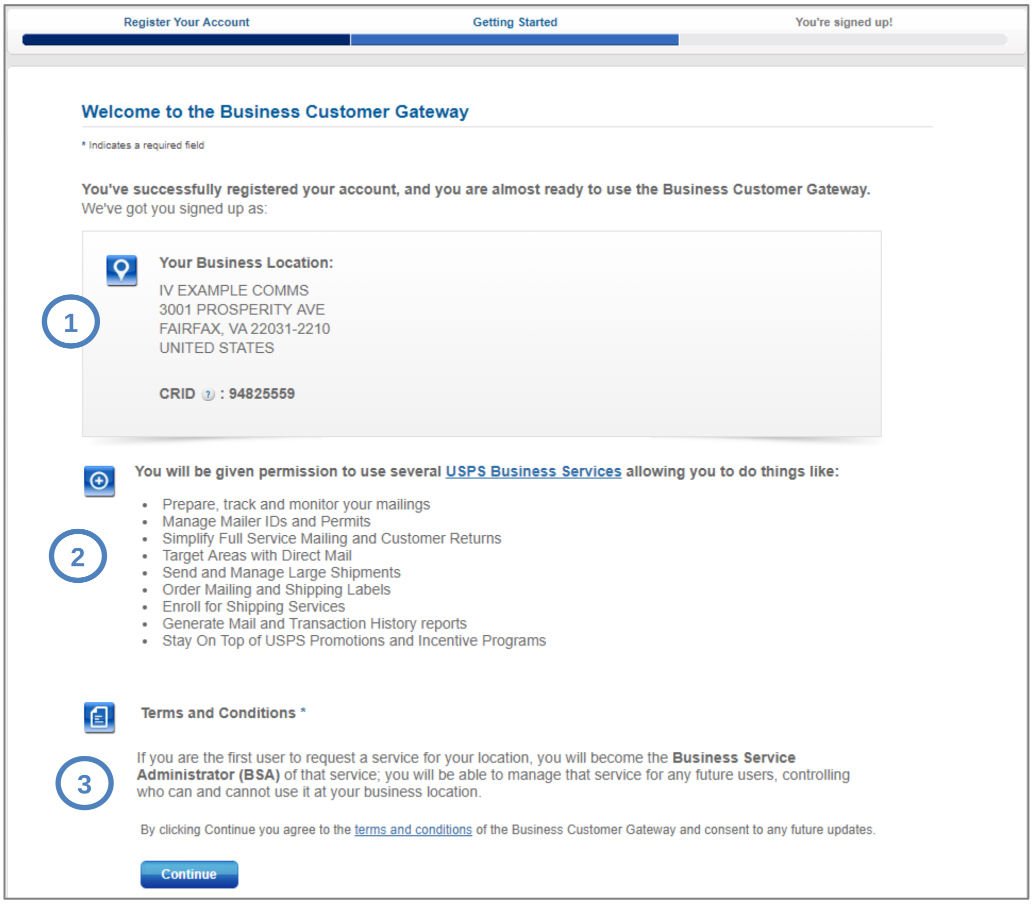
Table 4.3: Scenarios for Adding the IV-MTR Service

	New Location (New CRID) *Your business location (i.e., CRID) is newly established in the BCG, and you are the first BCG user associated with the location*	**Existing Location (Existing CRID)** *Your business location (i.e., CRID) was previously established in the BCG, and other BCG users are associated with the location*
New User *You have a BCG account but do not yet have access to any services*	See Section 4.3.1: *New User at a New Location*	See Section 4.3.2: *New User at an Existing Location*
Existing User *You have a BCG account and already have access to services*	See Section 4.3.3: *Existing User at a New Location (New CRID)*	See Section 4.3.4: *Existing User at an Existing Location (Existing CRID)*

4.3.1 New User at a New Location

After you finish registering for a BCG account, the BCG Account Welcome page shown below appears.

Note: If you are not taken to this page or you have exited the BCG, go to https://gateway.usps.com and log in with your BCG username and password. You will be directed to this page.



Review the following information on the page:

1 Your Business Location, including your CRID

- Note your CRID for future use

2 Your BCG Business Services

- As a new user at a new business location, you are given the core BCG services

3 The Terms and Conditions

- As the first user to register for your location, you are assigned as the BSA for the core services.

- You will automatically become the BSA for any additional services (e.g., IV-MTR) for which you are the first user to request the service for your location.

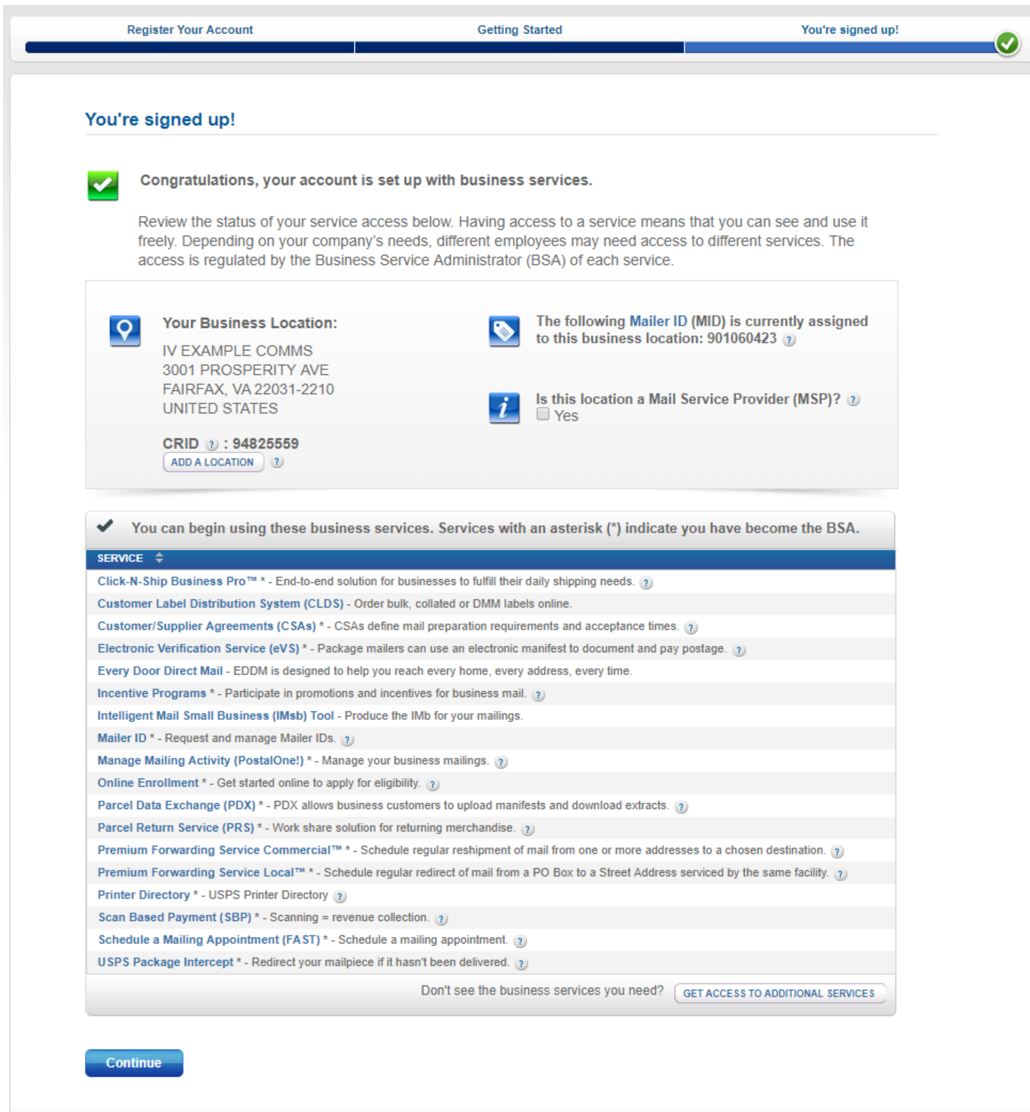
  For information about IV-MTR BSA permissions, see Section 1.4.2.1.3: *Business Service Administrator (BSA)*

- Read the terms and conditions

Then, click **Continue** to complete account registration.

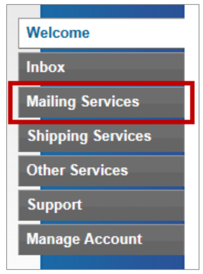
You will receive an email containing your CRID and MID and confirming the services you have been granted.

On the BCG site, you are taken to a page that displays your MID and the business services you now have access to. You have become the BSA for the services with an asterisk (*).



1. If you are an MSP, check the appropriate box.

2. Click **Continue**. You are taken to the BCG welcome page.
3. Click **Mailing Services**.



4. In the list of services, find “Informed Visibility,” and click **Get Access**. The button turns green, and the text changes to **Go to Service**.

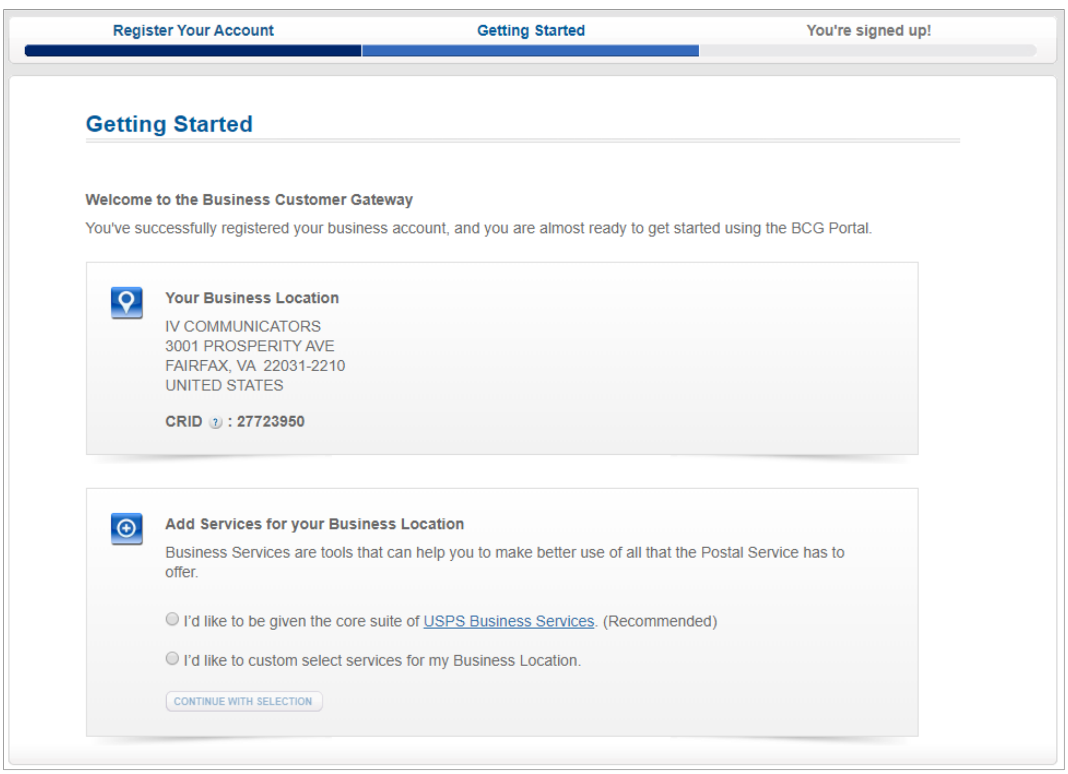
Now that you have a BCG account and the IV-MTR service, see Section 0:

Access the Application for instructions to access the IV-MTR application.

4.3.2 New User at an Existing Location

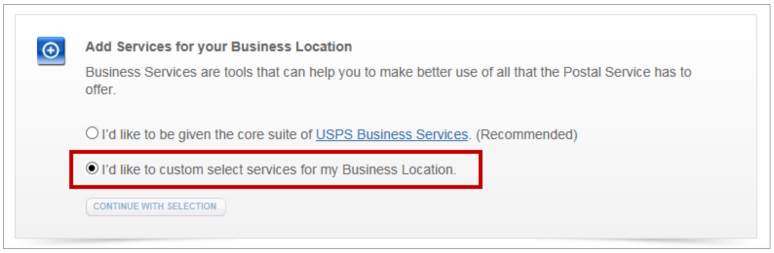
After you finish registering for a BCG account, you are taken to the page shown below to complete some additional steps.

Note: If you are not taken to this page or you have exited the BCG, go to https://gateway.usps.com and log in with your BCG username and password. You will be directed to this page.



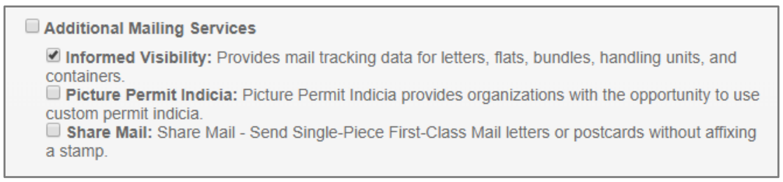
From this page:

1. Note your CRID, provided in the top section.
2. Under **Add Services for your Business Location**, select **I'd Like to custom select services for my Business Location**. The list of business services displays from which you may choose.



3. Under **Additional Mailing Services**, select **Informed Visibility**.

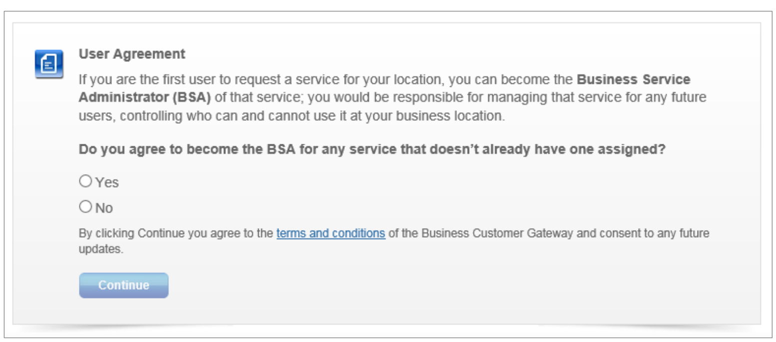
   Note: You may also select any additional services you want to request.



4. Click **Continue With Selection**.
5. A section appears explaining that you can become the BSA if you are the first user to request a service for your business location. Select **Yes** or **No**.

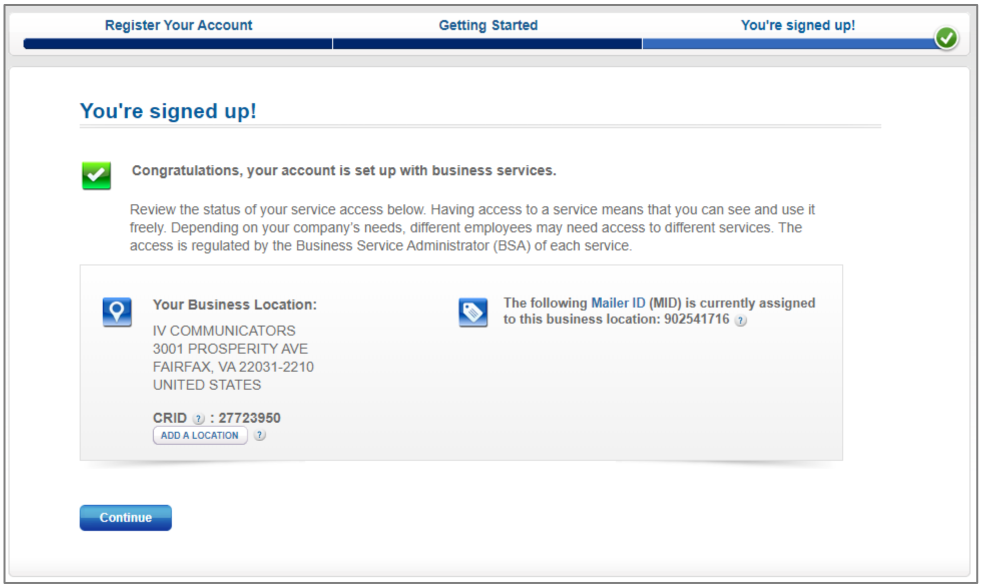
   Note:

   - For information about IV-MTR BSA permissions, see Section 1.4.2.1.3: *Business Service Administrator (BSA)*.
   - If you select **No**, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.



6. Review the terms and conditions, and then click **Continue**. You receive an email containing your CRID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA.

On the BCG site, you are taken to a page that displays your MID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA. You have become the BSA for the services with an asterisk (*).



7. On this page, click **Continue**. You are taken to the BCG welcome page.

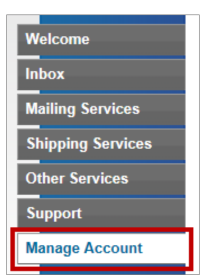
   Proceed as follows:

If you **are not** the IV-MTR BSA,	you must wait for the IV-MTR BSA to approve your request for the service. When your request is approved, you receive an email notification. Once you have the service, see Section 0: *Access the* Application for instructions to access the IV-MTR application.
If you **are** the IV-MTR BSA,	see Section 0: *Access the* Application for instructions to access the IV-MTR application.

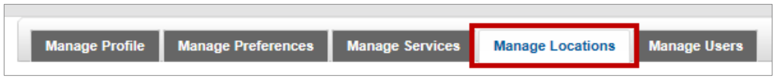
4.3.3 Existing User at a New Location (New CRID)

If you are an existing BCG user, follow these steps to add the IV-MTR service for a new location (i.e., CRID):

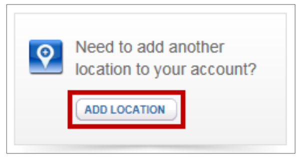
1. Log into the BCG.
2. Click **Manage Account**.



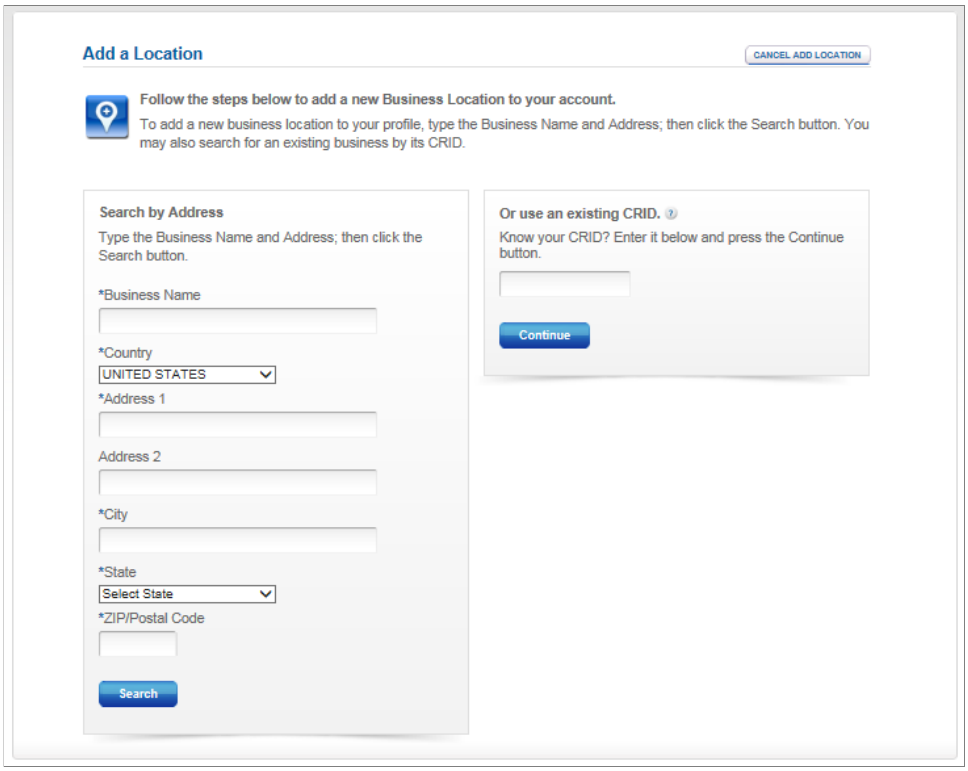
3. Click **Manage Locations**.



4. Click **Add Location**.

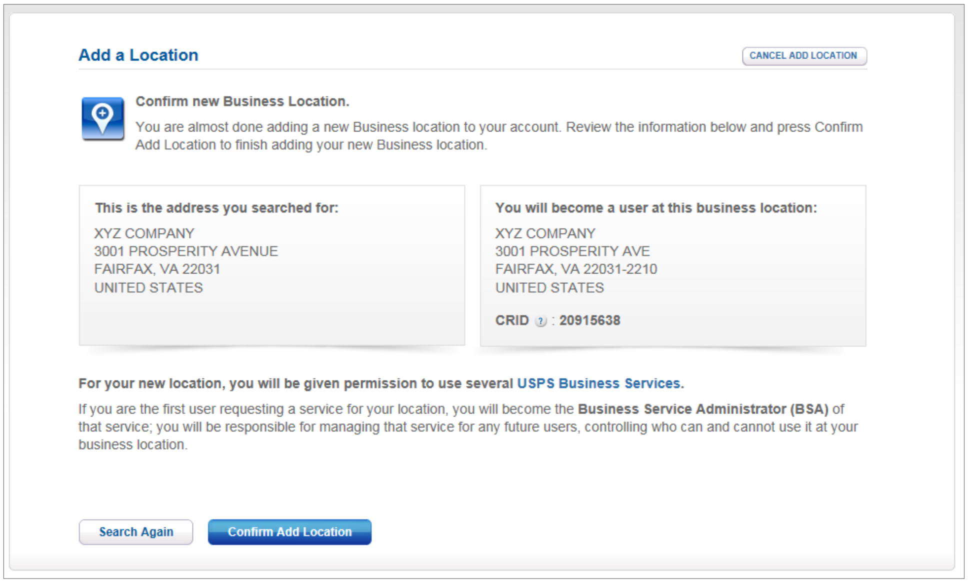


5. Enter the address information on the left and click **Search** OR enter your CRID number on the right and click **Continue**.

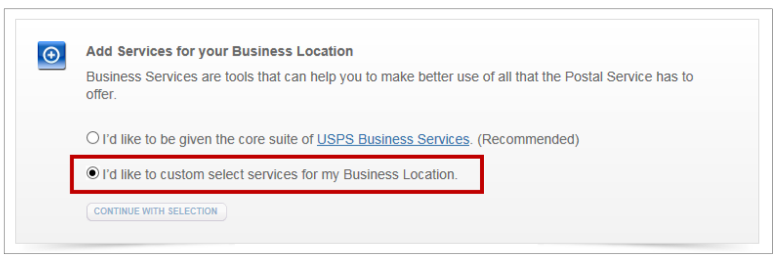


6. Follow the on-screen steps to confirm the address and verify the business name, if needed.

7. When you reach the page below, review the information, and then click **Confirm Add Location**.

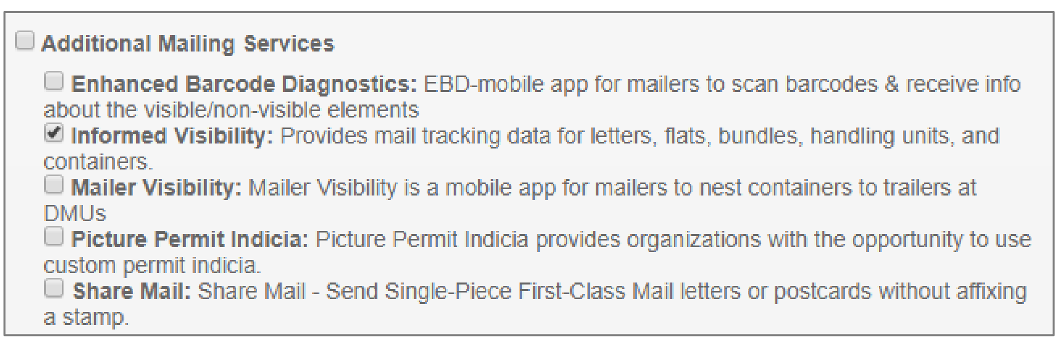


8. When the **Add Services for your Business Location** section appears, select **I'd like to custom select services for my Business Location**. The list of business services displays from which you may choose.



9. Under **Additional Mailing Services**, select **Informed Visibility**.

   Note: You may also select any additional services you want to request.

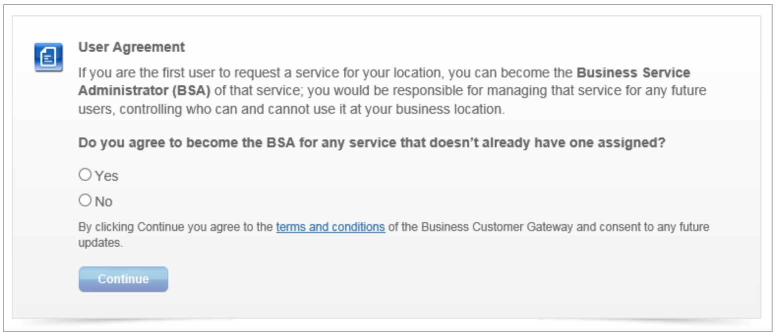


10. Click **Continue With Selection**.

11. A section appears explaining that you can become the BSA if you are the first user to request a service for your business location. Select **Yes** or **No**.

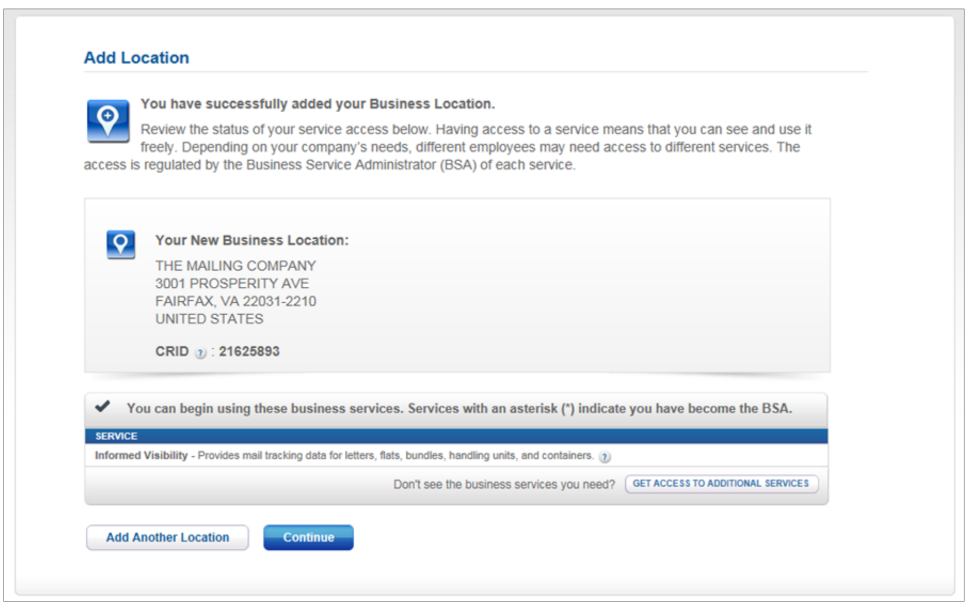
    Note:

    - For information about IV-MTR BSA permissions, see Section 1.4.2.1.3: *Business Service Administrator (BSA)*.
    - If you select **No**, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.



12. Review the terms and conditions, and then click **Continue**. You receive an email confirming that you have added a location to your account. The email contains your CRID and the list of services you have been granted.

    On the BCG site, you are taken to a page that displays the list of services you have been granted. You have become the BSA for the services with an asterisk (*).



13. On this page, click **Continue**. You are taken to the BCG welcome page.

    Proceed as follows:

If you **are not** the IV-MTR BSA,	you must wait for the IV-MTR BSA to approve your request for the service. When your request is approved, you receive an email notification. Once you have the service, see Section 0:

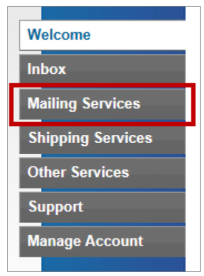
Access the Application for instructions to access the IV-MTR application.

If you **are** the IV-MTR BSA,	see Section 0: *Access the* Application for instructions to access the IV-MTR application.

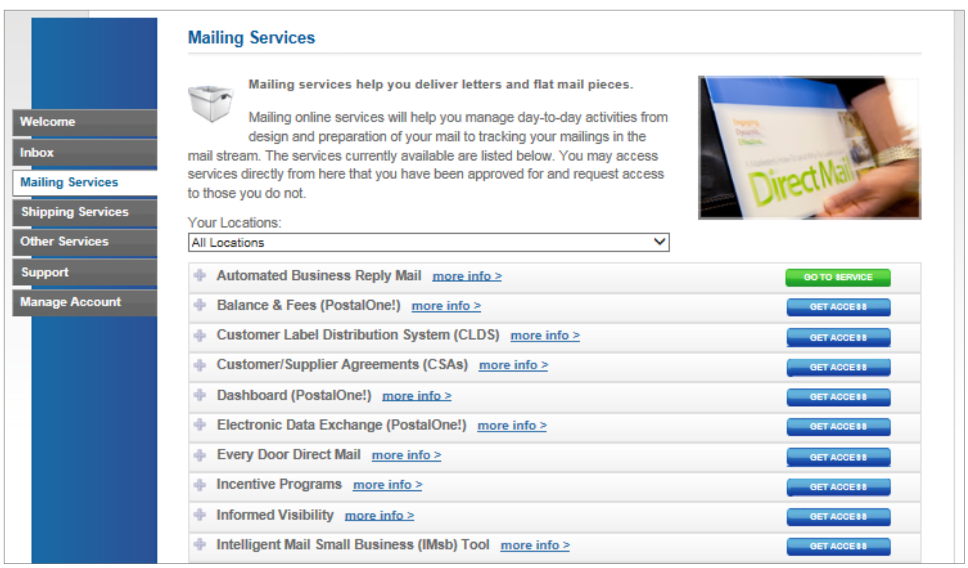
4.3.4 Existing User at an Existing Location (Existing CRID)

If you are an existing BCG user, follow these steps to add the IV-MTR service for an existing location (i.e., CRID):

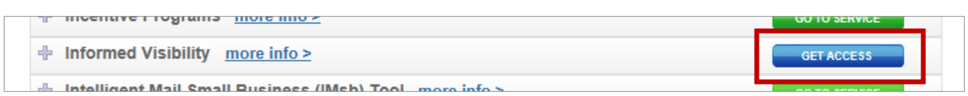
1. Log into [the BCG](#).
2. Click **Mailing Services**.



3. If you have access to more than one location, you may specify the location for which you want to add the IV-MTR service by selecting the location from the **Your Locations** drop-down menu.



4. In the list of services, find "Informed Visibility," and click **Get Access**. The button turns green, and the text changes to **Go to Service**.



- You will automatically become the IV-MTR BSA for this CRID if:

  1. You are the first user to request the IV-MTR service for your CRID, **and**

2. You are the first user to register for BCG for your location, or you selected the option to become the BSA for any service that does not already have a BSA when you signed up for BCG

- You receive an email confirming the addition of the service.
- If an IV-MTR BSA already exists for this CRID, you receive an email stating that your request is pending approval by the BSA. When the BSA approves your request, you receive an additional email. Once you have the service, see Section 0:
- *Access the* Application for instructions to access the IV-MTR application.
- If an IV-MTR BSA has not been assigned for this CRID **and** when you initially registered for the BCG you were not the first user for your location or you did not select to become the BSA for any service that does not already have a BSA, your request for the IV-MTR service will remain pending until a BSA is assigned and he or she approves your request. When the BSA approves your request, you receive an additional email. Once you have the service, see Section 0:
- *Access the* Application for instructions to access the IV-MTR application.

> **Important:** Contact the IV Solutions Center for any of the following issues:
> - You are supposed to be the IV-MTR BSA, but you were not properly established as the IV-MTR BSA in the BCG.
> - You want to make someone else the BSA.

4.4 Access the Application

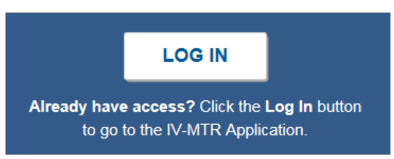
There are two ways to access the IV-MTR application:

1. Directly Accessing IV-MTR
2. Accessing IV-MTR through the BCG Portal

4.4.1 Directly Accessing IV-MTR

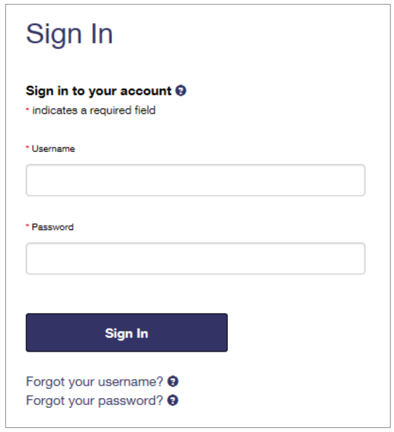
To access the web application directly:

1. Go to https://iv.usps.com.
2. On the IV-MTR page, click **Log In**.

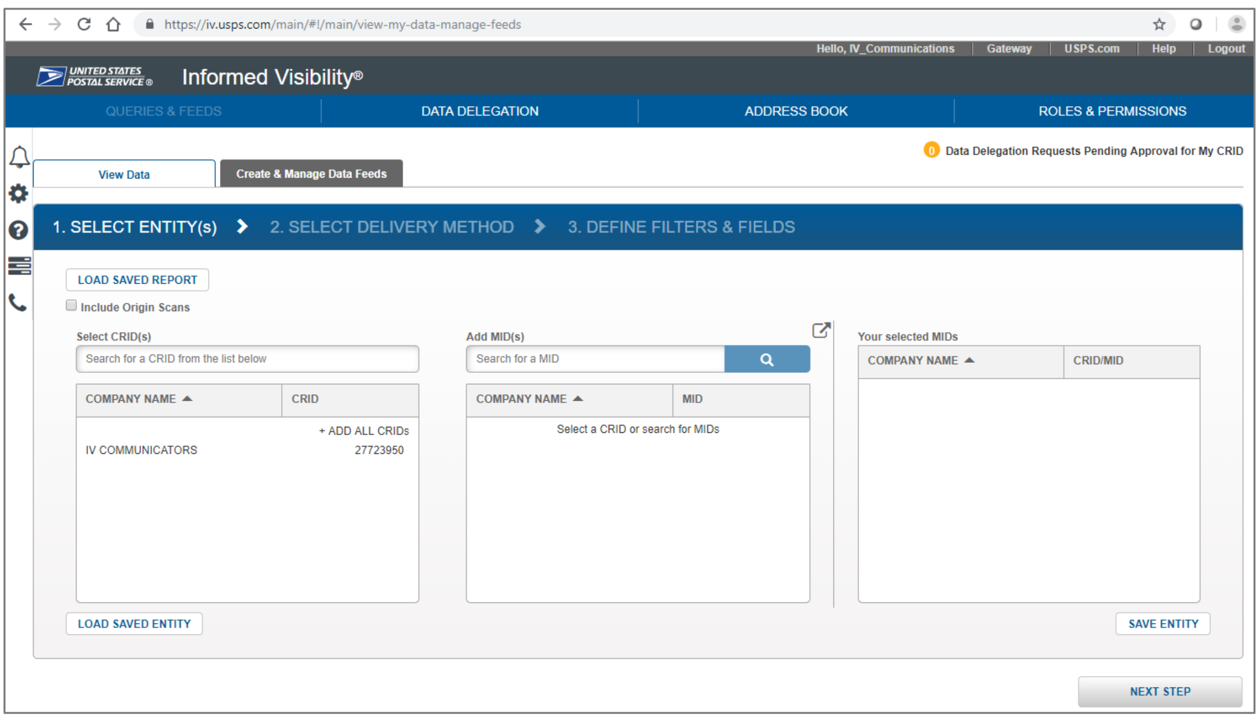


3. At the login page, enter your BCG username and password.

4. Click **Sign In**. The IV-MTR application opens.



The IV-MTR application opens to the Queries & Feeds screen, the default homepage for the IV-MTR application. For information about navigating the IV-MTR site, see Section 5: *Application Areas and User Functionality*.

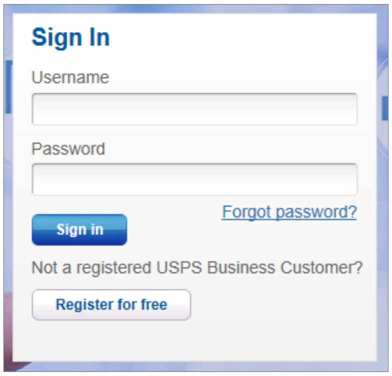


4.4.2 Accessing IV-MTR through the BCG Portal

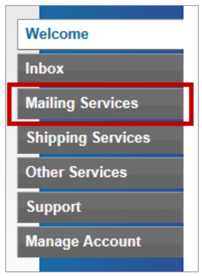
To access the IV-MTR web application from within the BCG:

1. Go to https://gateway.usps.com.
2. In the **Sign In** box, enter your BCG username and password.

3. Click **Sign in**.

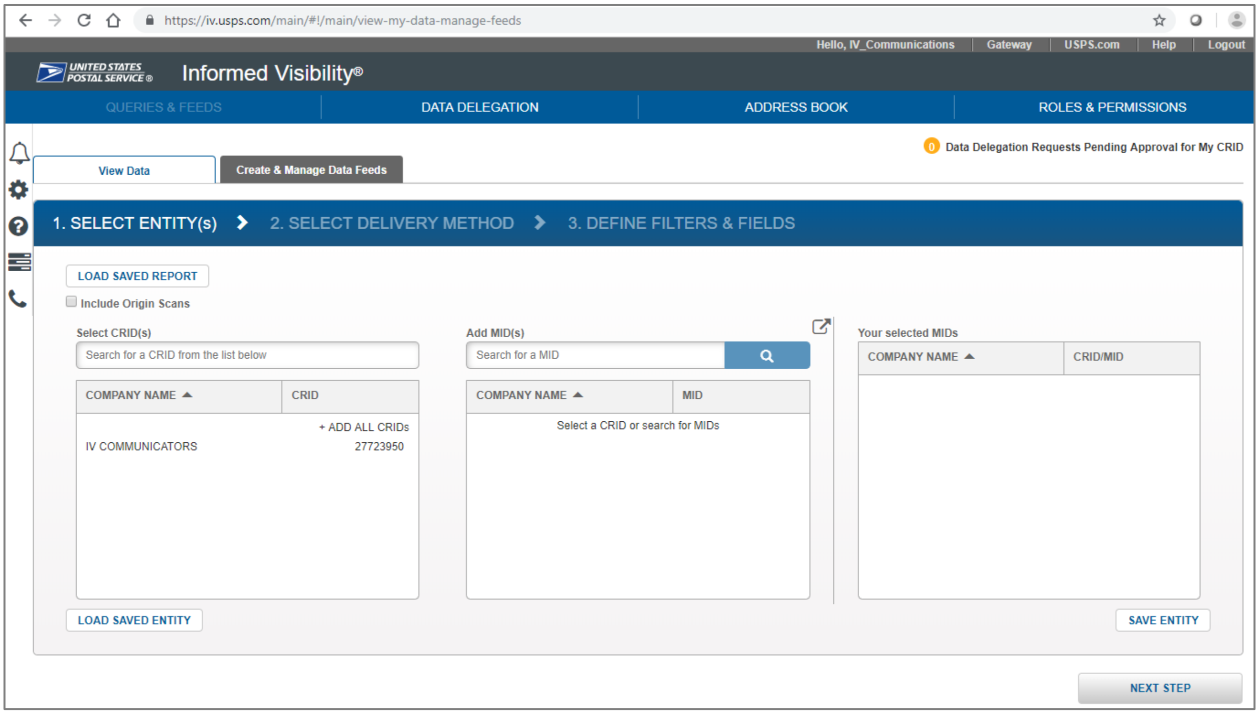


4. In the left-hand navigation area, click **Mailing Services**.



5. In the list of services, find “Informed Visibility,” and click **Go to Service**.

The IV-MTR application opens to the Queries & Feeds screen, the default homepage for the IV-MTR application. For information about navigating the IV-MTR site, see Section 5: *Application Areas and User Functionality*.



5 Application Areas and User Functionality

This section provides a brief overview of the IV-MTR application user interface, including:

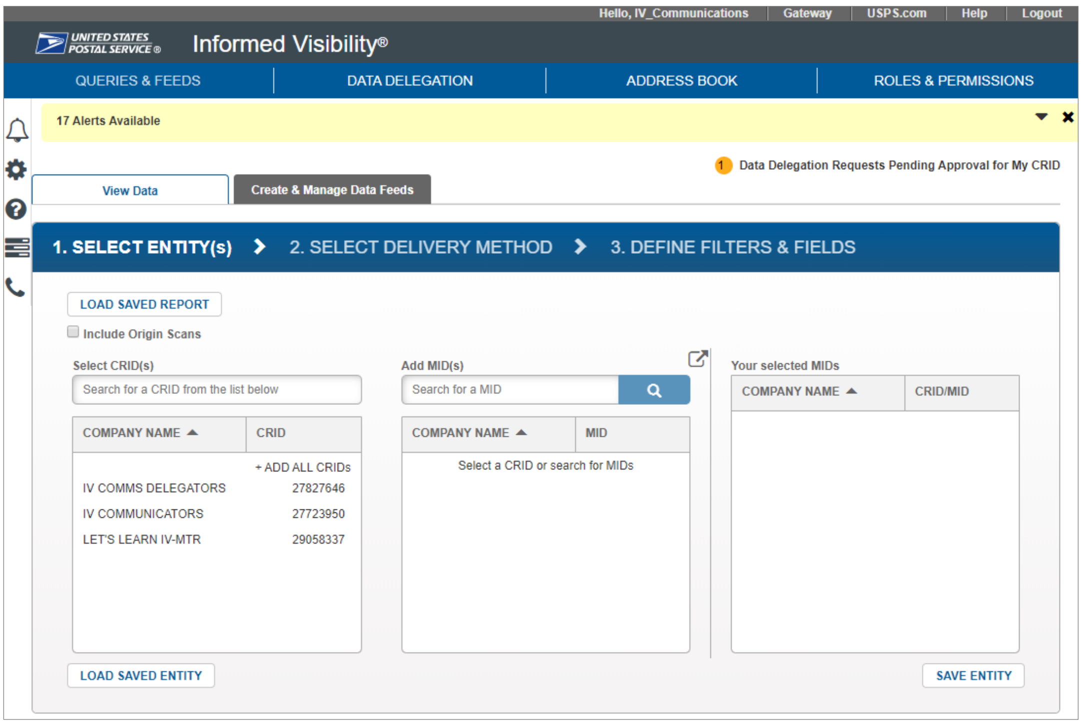
- Basic Navigation
- Application Areas

5.1 Basic Navigation

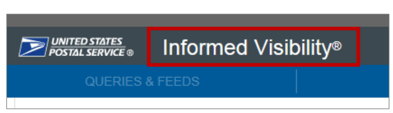
The section provides a brief overview of the navigational aids provided in the IV-MTR application. For an in-depth explanation of how to navigate the application, please see the IV-MTR Orientation Training, available on PostalPro.

5.1.1 IV-MTR Homepage

The IV-MTR homepage defaults to the Queries & Feeds page.



To return to the homepage at any time in the application, click **Informed Visibility** in the IV header.



5.1.2 Navigation and Widget Bars

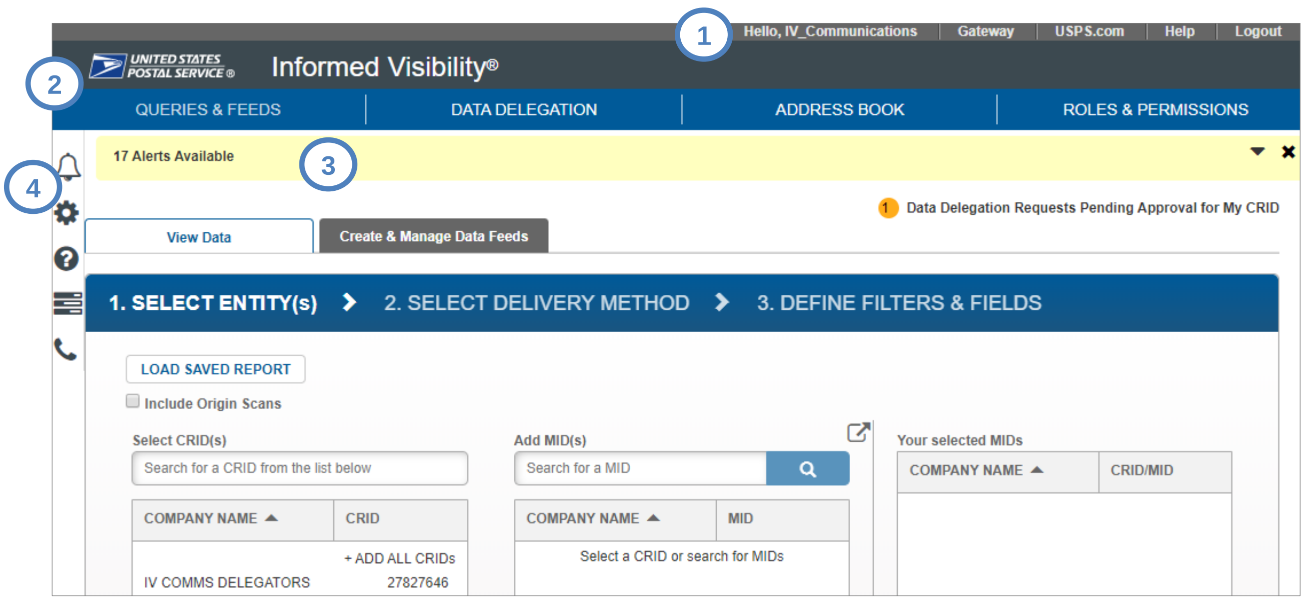
Navigation and widget bars help you move around the application and customize your experience as summarized below. Detailed information about these aids is provided in the IV-MTR Orientation Training.

1 **BCG Navigation Bar** – Displays the user you are logged in as and provides links to other USPS sites

2 **IV-MTR Functionality Bar** – Allows you to navigate to the major areas of the site

3 **Notification Area** – Displays any alerts and actions related to your account

4 **Widget Sidebar** – Allows you to personalize your IV-MTR experience and find help if you need it



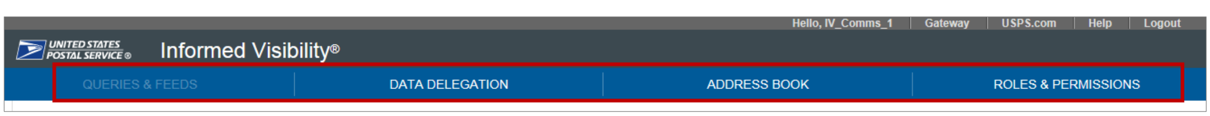
5.2 Application Areas

Each user's experience in the application is based on the user level assigned to them by the BSA. General users will not be able to see all the areas of the application described in this section.

- For a detailed explanation of the user levels and Roles & Permissions available in the IV-MTR application, see Section 1.4.2: *Controlling User Access*.
- For detailed information about what areas are available for each user level, continue with this section.

There are four major areas in the application, displayed on the IV-MTR Functionality Bar:

1. Queries & Feeds
2. Data Delegation
3. Address Book
4. Roles & Permissions



An overview of each of these areas, including notes on applicable visibility restrictions, is provided in the table below.

Table 5.1 Application Areas and Availability Overview

Description	Availability & Restrictions	Instructions
Queries & Feeds Area		
Allows you to set up data provisioning	One-Time Queries are available to all users.	7: *One-Time Queries*
	Data Feeds are only available to BSAs, BSA Delegates, and Subscription Managers.	8: *Data Feeds*
Data Delegation Area		
Allows you to set up and manage data delegations, including sharing, requesting, and receiving data	Limited functionality is available to all users. Full functionality is available to BSAs, BSA Delegates, and Data Delegation Managers.	9: *Data Delegation*
Address Book Area		
Allows you to add, modify, and remove contacts and servers stored in the Address Book	All users can view Address Book entries. Only BSAs, BSA Delegates, and Address Book Managers can make changes to the Address Book.	10: *Address Book*
Roles & Permissions Area		
Allows you to manage roles (functionality) and permissions (visibility) for CRIDs and users	Restricted to BSAs, BSA Delegates, and Roles and Permissions Managers.	11: *Roles and Permissions*

A comprehensive list of actions available by user level is provided in Table 5.2.

Table 5.2: Functionality by Access Level and User Role

Application Area	Function	User Guide Section	BCG Access Level *All users have an access level for each service for each CRID*			IV-MTR Application User Role† *Users may or may not have roles in the application.* *IV-MTR BSA and BSA Delegate users have ALL of the application user roles.*				
			Access (General User)	***IV-MTR BSA****	***IV-MTR BSA Delegate****	***Address Book Manager***	***Data Delegation Manager***	***Report Manager***	***Roles and Permissions Manager***	***Subscription Manager***
BCG	Approve/deny a request for the IV-MTR service	6		X	X					
	Designate an IV-MTR BSA Delegate	6		X	X					
Queries & Feeds	Perform a one-time query for Online View or Data Download	7	X	X	X	●	●	●	●	●
	Perform a one-time query for Send to Address	7		X	X					X
	View the one-time query Output History and download/resend files	7.7	X	X	X	●	●	●	●	●
	Create/modify/activate/delete a data feed	8		X	X					X
	View the data feed Output History and download/resend files	8.2.1	X	X	X	●	●	●	●	●
	View the settings for a data feed	8.2.2	X	X	X	●	●	●	●	●
	Load/create/modify/delete a **private** saved entity, report, filter, or view	12	X	X	X	●	●	●	●	●
	Load a **public** saved entity, report, filter, or view	12	X	X	X	●	●	●	●	●
	Create a **public** saved entity, report, filter, or view	12		X	X			X		X
	Modify/delete a **public** saved entity, report, filter, or view	12		X	X			X		X
	Associate/disassociate a **public** saved entity to/from a data feed	13.1		X	X					X
	Modify a **public** saved entity associated to a data feed	13.1.6		X	X			X		X
Data Delegation	Request to **receive** visibility **from** another CRID/MID	9.1.1		X	X		X	X		
	View the history of requests to **receive** visibility **from** another CRID/MID	9.1.2	X	X	X	●	●	●	●	●
	Cancel a pending request to **receive** visibility **from** another CRID/MID	9.1.2		X	X		X			
	View/approve/deny a request to **provide** visibility **to** another CRID/MID	9.2.1		X	X		X			
	View the history of requests to **provide** visibility **to** another CRID/MID	9.2.2		X	X		X			
	Modify/delete an existing rule to **provide** visibility **to** another CRID/MID	9.2.2		X	X		X			
	Create a rule to **provide** visibility **to** another CRID/MID	9.3		X	X		X			
	View existing rules to **receive** visibility **from** another CRID/MID	9.4	X	X	X	●	●	●	●	●
	Delete an existing rule to **receive** visibility **from** another CRID/MID	9.4		X	X		X			
Address Book	View address book entries	10	X	X	X	●	●	●	●	●
	Create an address book entry	10		X	X	X				X
	Modify/delete an address book entry	10		X	X	X				
Roles & Permissions	Assign and modify roles and permissions	11		X	X				X	

** The IV-MTR BSA is the user designated as the BSA for the IV-MTR service for a particular CRID. An IV-MTR BSA Delegate is a user designated as a BSA Delegate for the IV-MTR service for a particular CRID.*

† In the user role columns, an X indicates the function is available because the user has the particular role assigned. A ● denotes a function that is available because it is available to ALL users, regardless of access level or user role.

6 IV-MTR BSA Functions

BSAs and BSA Delegates are administrative-level users who can complete tasks unavailable to general users. In IV-MTR, the BSA tasks include:

- Setting up each CRID in the IV-MTR application
- Granting access to other users through the BCG
- Designating desired BSA Delegates
- Managing data feeds
- Managing data delegation
- Managing user roles and permissions
- Managing templates for pulling data
- Managing servers and contacts used in the application
- Removing access for users

Some of these actions are completed in the IV-MTR application while others are completed in the BCG. See the table below to find instructions for completing each of these tasks. For general information about BSAs and BSA delegates, see the BSA Instructions on PostalPro.

Table 6.1. Instructions for Completeing IV-MTR BSA-Level Tasks

Administrative Responsibility	Instructions
Granting access to other users in BCG	See the *Managing Other Users' IV-MTR Access* in BCG section of the BSA Instructions
Designating desired BSA Delegates	See the *Designating an IV-MTR BSA Delegate* section of the BSA Instructions
Managing data feeds	See Section 8: *Data Feeds*
Managing data delegation	See Section 9: *Data Delegation*
Managing user roles and permissions	See Section 11: *Roles and Permissions*
Managing templates for pulling data	See Section 13: *Saved Reports*
Managing server set up and contact info	See Section 10: *Address Book*
Removing access for users	See the *Managing Other Users' IV-MTR Access in BCG* section of the BSA Instructions

For information about which functions are available for each user role, see Section 11: *Roles and Permissions*.

7 One-Time Queries

This section provides instructions for setting up and running one-time queries, which are one-time (ad hoc) searches for particular sets of records. With a one-time query, you can:

- Receive data for scan events and IDPC data
- Specify the dates you want to receive records for, including dates in the past
  - Data is available for the past 120 days
  - Piece-level scan data can be requested for up to 14 days at a time
  - IDPC and Container, Handling Unit, and Bundle-level scan data can be requested for any length of time
- Choose from three options for receiving data:
  - Online viewer
  - Downloadable file
  - File sent to your server
    - Note: this delivery method is only available to BSAs, BSA Delegates, or Subscription Manager users

Any IV-MTR user can complete a one-time query.

7.1 Getting Started

To complete a one-time query, you need:

1. The entities (any CRIDs, MIDs, and/or routing codes) you would like data for
2. The types of data you would like to receive
3. *Optional*: The dates for the timeframe you are interested in
4. *For delivery to server only:* the configuration information for the server where IV-MTR should deliver your query results
   - If you have not configured the server in your IV-MTR address book yet, you will be able to add it during query setup.

7.1.1 Process Overview

There are six main steps to completing a one-time query:

1. Beginning a One-Time Query – Access the one-time query screen and select a data type
2. Selecting Entity(s) – Choose the data type and the CRID(s), MID(s), and/or routing code(s) that you want to receive data for
3. Selecting a Delivery Method – Choose how you will view the results
4. Defining Filters & Fields – Choose and order the specific data fields you want to receive
5. Submitting Your Query – Review and submit your query for processing
6. Retrieving One-Time Query Results – Access and view the results of your query

Detailed information on completing each of these steps is provided in the following sections.

7.1.2 Saving Time with Saved Reports

The IV-MTR application provides a feature called *saved reports* that allows you to create and use templates across different one-time queries and data feeds. For example, if you want to use the same set of CRIDs or filters for multiple one-time queries, you can create and use a saved report. The templates available for one-time queries are:

1. Saved Entities – Your desired CRIDs, MIDs, and/or routing codes
2. Saved Filters – Your desired data field filters
3. Saved Views – Your desired data fields in your desired order
4. Saved Reports – Your desired entities (CRIDs, MIDs, and/or routing codes), mail object and handling event types, filters, and data fields

If you are interested in using a saved report with your one-time queries, please see Section 13: *Saved Reports* for details.

7.2 Beginning a One-Time Query

To begin a one-time query, you need to:

A. Access the One-Time Query Screen
B. Choose a Data Type

Instructions for completing these steps are provided in this section.

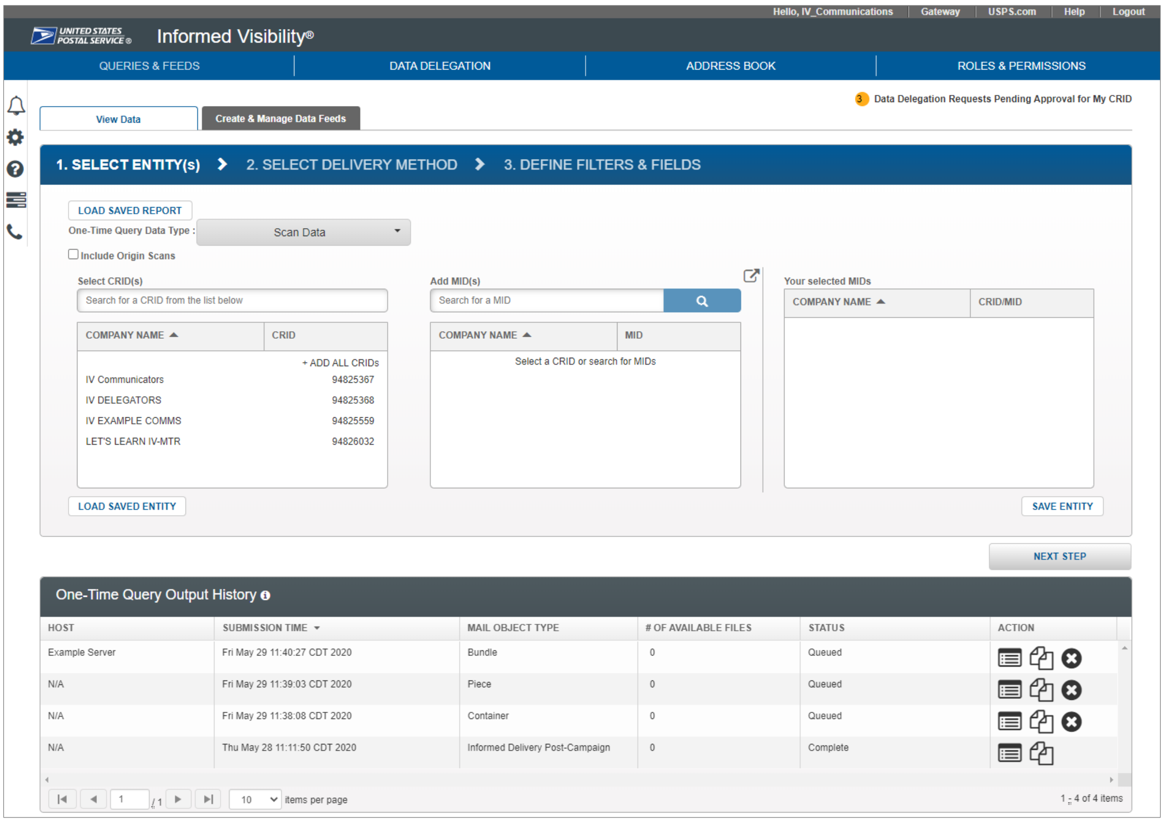
7.2.1 Access the One-Time Query Screen

The one-time query area of the application is located on the IV-MTR homepage, the Queries & Feeds page. To access this page, log into IV-MTR and click the **Queries & Feeds** tab in the IV navigation bar.

The Queries & Feeds page will appear, set to the **View Data** tab. This is the one-time query area of the application. The area is divided into two parts:

A. The top part of the page allows you to create a one-time query

B. The bottom part of the page shows your completed one-time queries results in the One-Time Query Output History

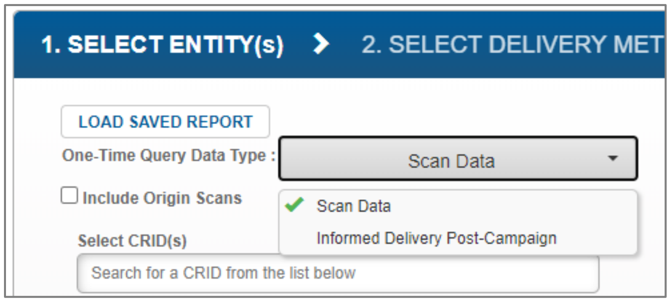


Proceed to the next section to choose a data type.

7.2.2 Choose a Data Type

The first step in creating a one-time query is to select a data type from the **Data Type** drop down menu in the Select Entities section. Choose one of the following:

- **Scan Data** – Mail tracking (scan) data
- **Informed Delivery Post-Campaign** – IDPC data
    - IDPC-specific instructions for setting up one-time queries are available in the [Provisioning IDPC Data through IV-MTR User Guide](#).
    - Other pass through data types (including EPS and MQD) are not available in one-time queries at this time.



Once you have chosen your data type, proceed to the next section.

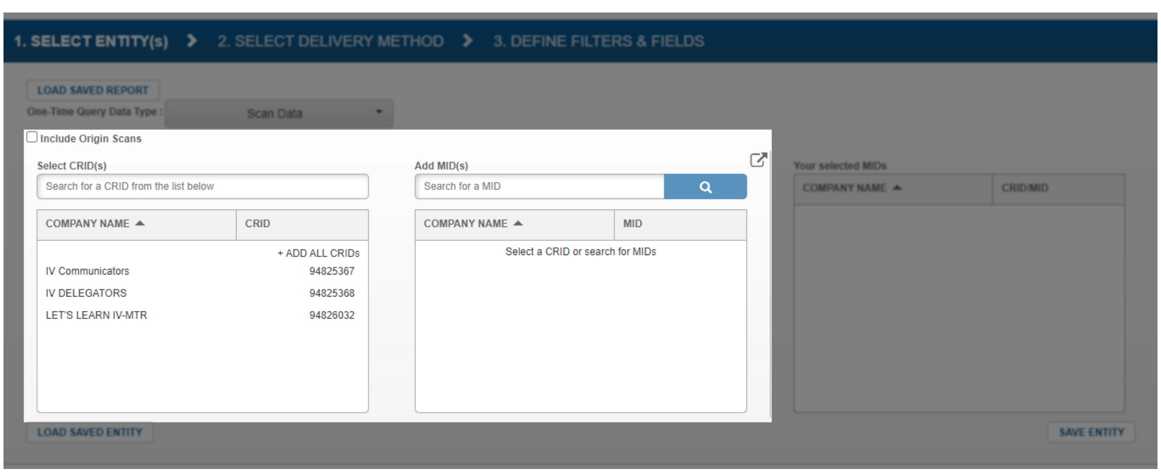
7.3 Selecting Entity(s)

The second step of creating a one-time query is to select the entities you want in the query. This section provides instructions and information about:

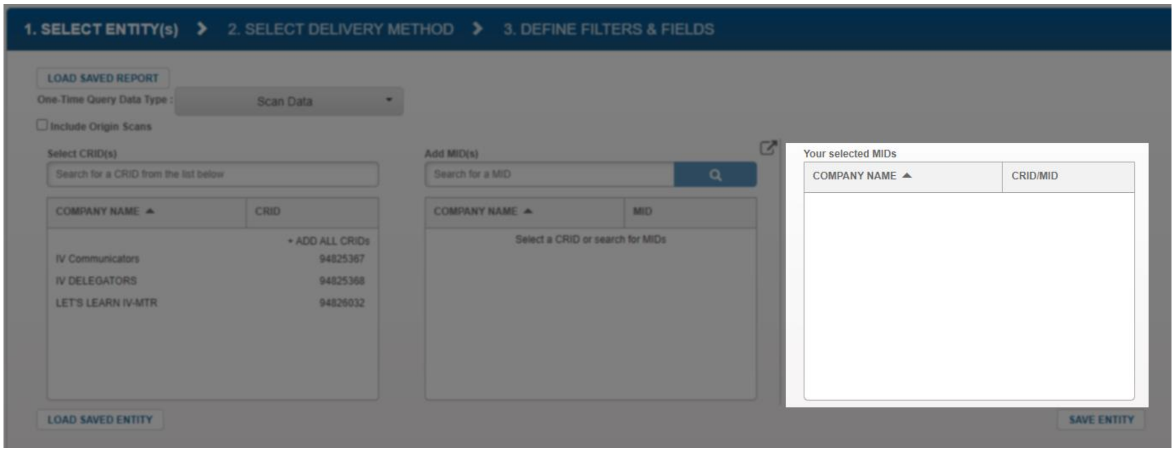
- Entity Selection Tools
- Data Availability
- Select CRIDs Pane
- Add MIDs Pane
- Select Routing Codes Pane
- Review Entity Selection

The Select Entity(s) screen itself is organized into two sections:

1. **The left side** of the screen provides **tools for selecting the entities** you want included



2. **The right side** of the screen displays **the entities you have selected** for the query



For information about using a Saved Report or Saved Entity, please see Section 13: *Saved Reports*.

7.3.1 Entity Selection Tools

You can select entities a number of ways on this screen. Proceed based on the table below.

If you want to select entities by…	See…
CRID	Select CRIDs Pane
MID	Add MIDs Pane
Routing Code	Select Routing Codes Pane Notes: • Routing codes must be mapped to your CRID before you can select them. Contact the IV Solutions Center for more information. • You can select routing codes in addition to CRIDs and MIDs if desired

7.3.2 Data Availability

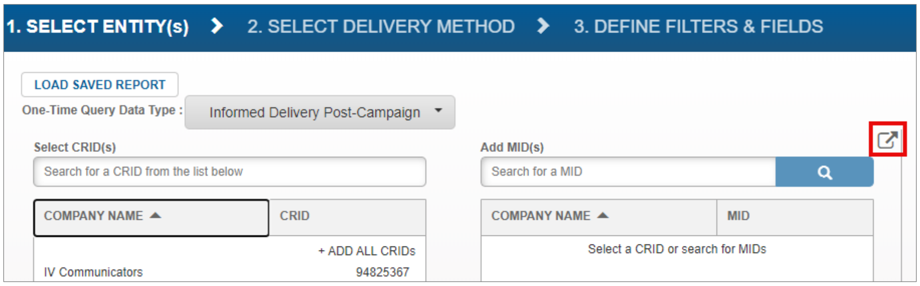
On the Select Entity(s) screen, you can choose entities that:

- 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 and Permissions feature)

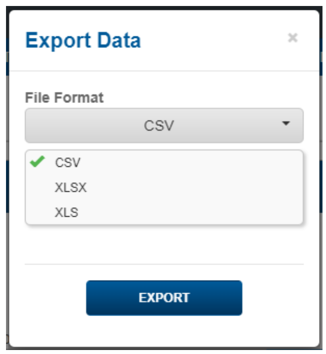
Note: By default, users always have visibility permissions for the entities they have access to in IV-MTR. If you have any questions about your visibility permissions, please see your BSA.

To see a list of all the entities (CRIDs, MIDs, and routing codes) you can choose from, complete the following:

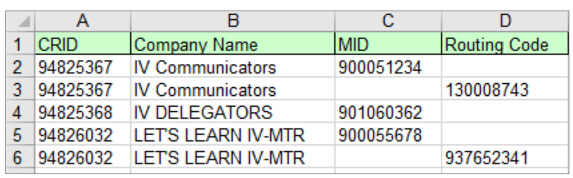
1. Click the Export icon to the right of the Add MID(s) section.



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. If you do not see entities you would like data for, consult your BSA.



	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

7.3.3 Select CRIDs Pane

The Select CRID(s) pane lets you select the CRID(s) your MIDs belong to (see Section 7.3.2. *Data Availability* for details). You may add as many CRIDs as you like.

Add CRIDs using one of the following options:

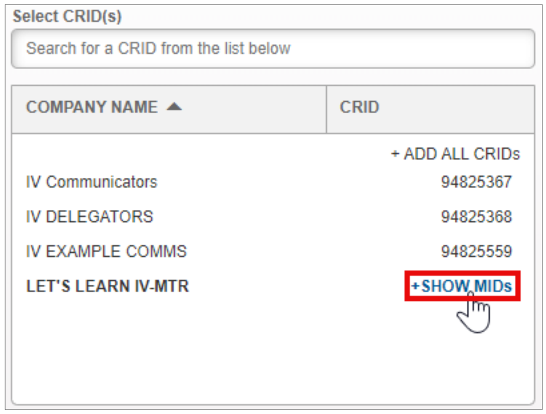
A. Add individual CRID(s)

B. Add all your CRIDs at once

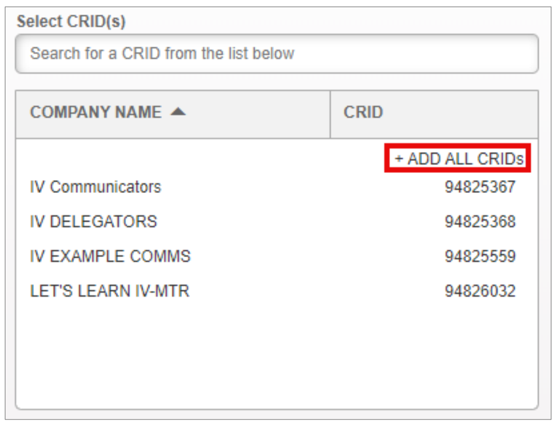
C. Search for a CRID

Instructions for each option are provided below.

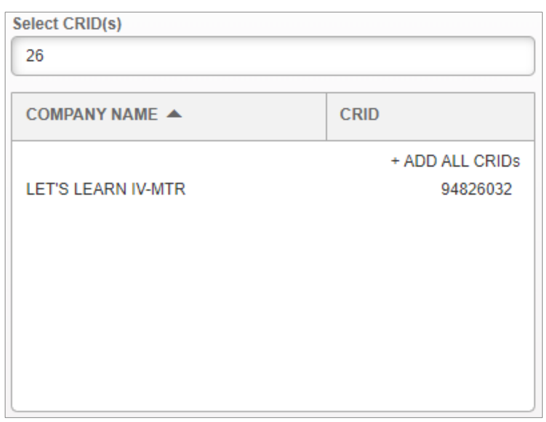
A. **To add an individual CRID:** Hover over the CRID and click **+SHOW MIDS.** The CRID and its MID(s) will move from the Select CRID(s) pane to the Add MID(s) pane.



B. **To add all MIDs for all CRIDs at once:** Click the **+ADD ALL CRIDs** button in the top corner of the CRID listing. All your MIDs will move to the Add MID(s) pane.



C. **To search for a CRID:** Use the **Search** box, then add the desired CRID(s) using one of the options described above.



Once you have finished adding all the CRIDs you are interested in, proceed to the next section.

7.3.4 Add MIDs Pane

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.

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 (see the previous section) or if you use the MID search box (see below). For information about the MIDs you have visibility for, see Section 7.3.2. *Data Availability*.

Add MIDs using one of the options below. Selected MIDs will move from the Add MID(s) pane to the Your selected MID(s) pane.

A. Add individual MID(s)

B. Add all MIDs for a particular CRID

C. Add all your MIDs at once

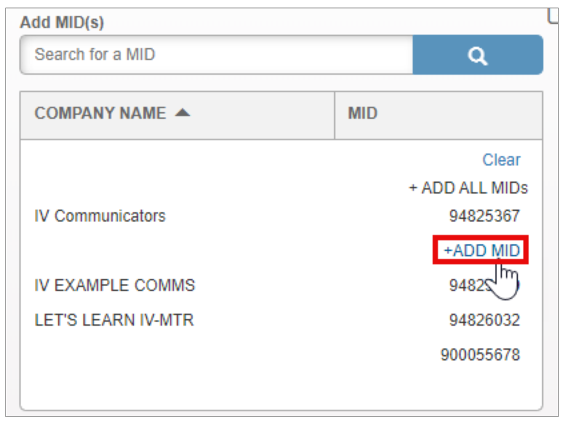
D. Search for a MID

E. Clear all MIDs and start over

Instructions for each option are below.

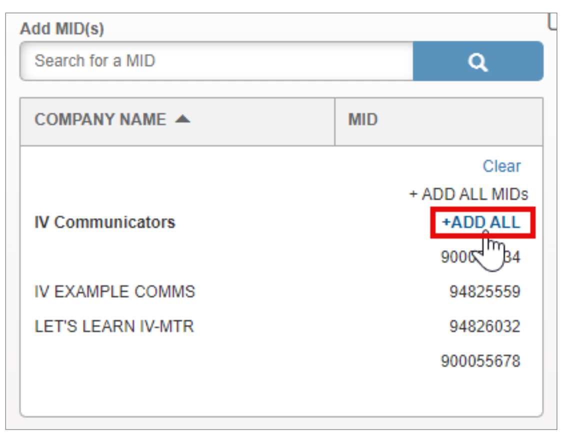
A. **To add an individual MID:** Hover over the MID and click **+ADD MID**

- Note: This will create a MID-level query. A MID-level query only provides data for the selected MID.



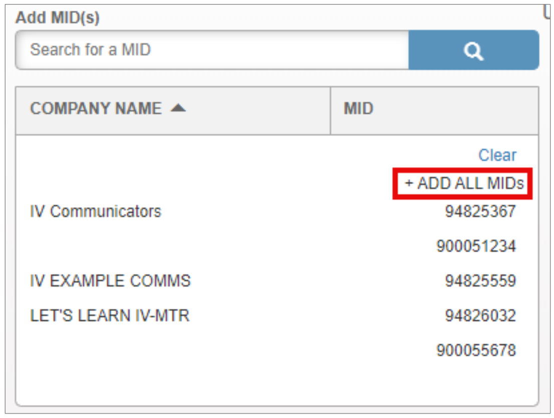
B. **To add all MIDs for a CRID:** Hover over the CRID and click **+ADD ALL**

- Note: This will create a CRID-level query. A CRID-level query provides data for all MIDs belonging to the CRID.



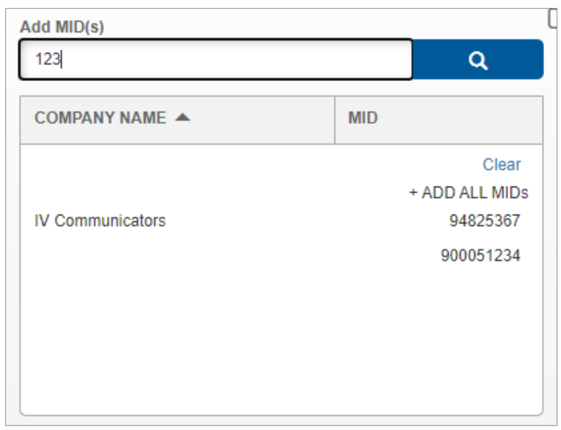
C. **To add all MIDs for all CRIDs at once:** Click the **ADD ALL MIDs** button in the top corner of the MID listing.

- This creates a CRID-level query for each CRID. A CRID-level query provides data for all MIDs belonging to the CRID.

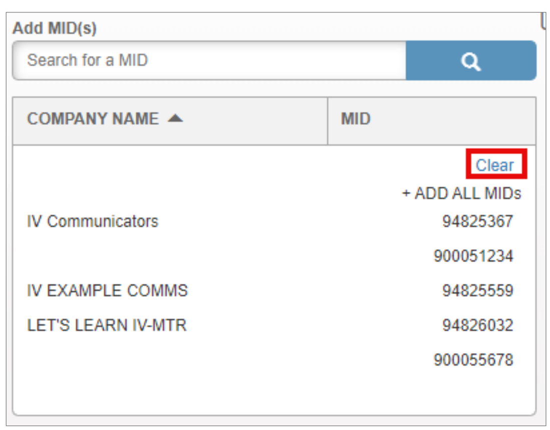


D. **To search for a MID:** Use the **Search** box, then add the MID(s) using one of the options described above.

- You must enter at least three digits into the box in order to search.



E. **To clear all MIDs and start over:** Click the **Clear** link in the upper right corner of the MIDs list. Then, add MIDs using one of the methods above (or via the Select CRIDs Pane).



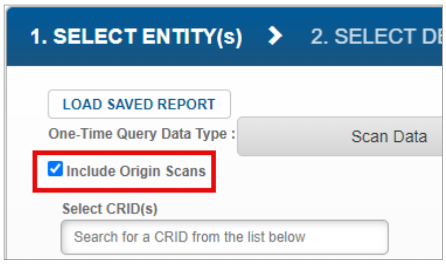
Once you have finished adding all the MIDs you are interested in, proceed as follows:

- To narrow your results further using routing codes, see Section 7.3.5: *Select Routing Codes Pane.*
- To proceed without adding routing codes, proceed to Section 7.3.6: *Review Entity Selection.*

7.3.5 Select Routing Codes Pane

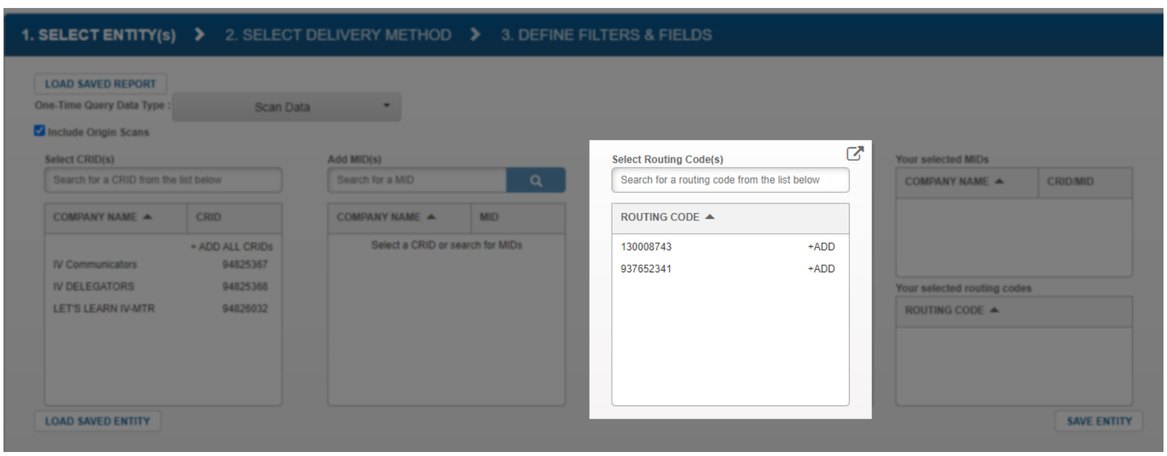
If you have a routing code that has been mapped to your CRID(s), you can add a routing code to your query instead of or in addition to CRIDs or MIDs. For information about mapping routing codes in IV-MTR, please contact the IV Solutions Center.

To add a routing code to your query, **check** the **Include Origin Scans** checkbox above the Select CRIDs pane, in the top left side of the screen.

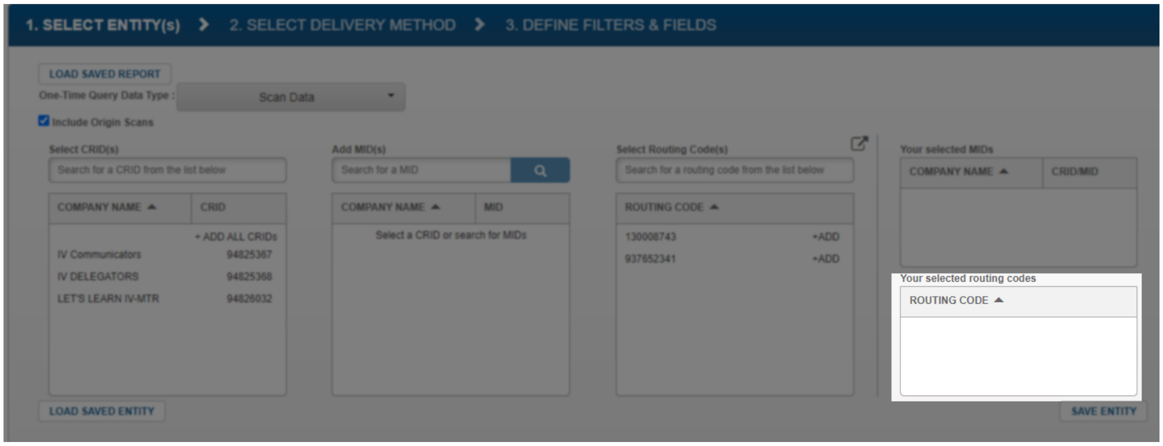


Two new panes will appear on the screen:

- On the **left side** of the screen, where the tools for selecting your data are, a new **Select Routing Code(s)** pane will appear



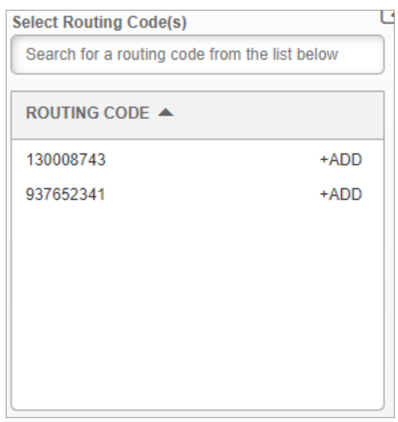
- On the **right side** of the screen, where the entities you have selected are listed, a new **Your selected routing codes** pane will appear



Data Availability

The **Select Routing Code(s)** pane automatically populates with the routing codes mapped to the CRIDs or MIDs you have access to.

- To view a list of all the available routing codes, follow the instructions for exporting entities in Section 7.3.2. *Data Availability*.
- If an expected routing code does not appear, it has not been mapped to a CRID or MID you have access to. Contact the IV Solutions Center for instructions.



Adding Routing Codes

The Select Routing Code(s) pane lets you select the routing code(s) you want to include in the query. You may add as many routing codes as you like.

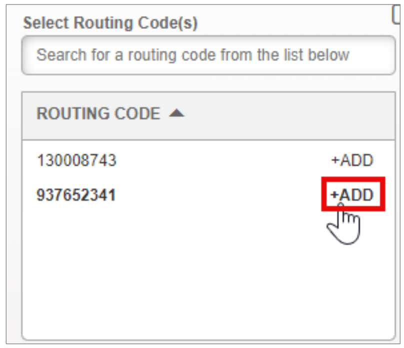
Add routing codes using one of the options below.

A. Add individual routing code(s)

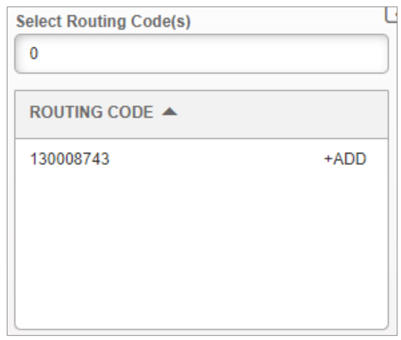
B. Search for a CRID

Instructions for each option are below.

A. **To add a routing code:** Hover over the code and click **+ADD**. The routing code will move from the Select Routing Code(s) pane to the Your selected routing code(s) pane.



B. **To search for a routing code:** Use the **Search** box, then add the code(s) using method described above**.**

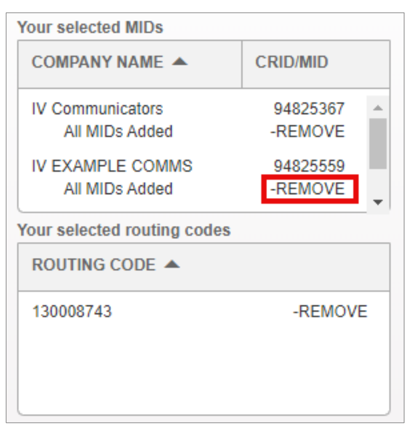


Once you have finished adding all the routing codes you are interested in, proceed to the next section.

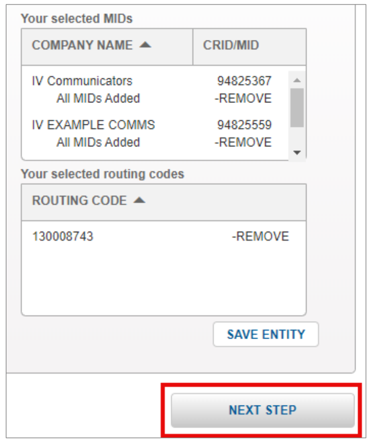
7.3.6 Review Entity Selection

Once you have added all the MID(s) and/or routing codes you would like, complete the following:

1. Review the **Your selected MIDs** and/or **Your selected routing codes** section(s) to verify your selections.
   - **To remove an entity you don't want,** hover over it and click **-REMOVE**

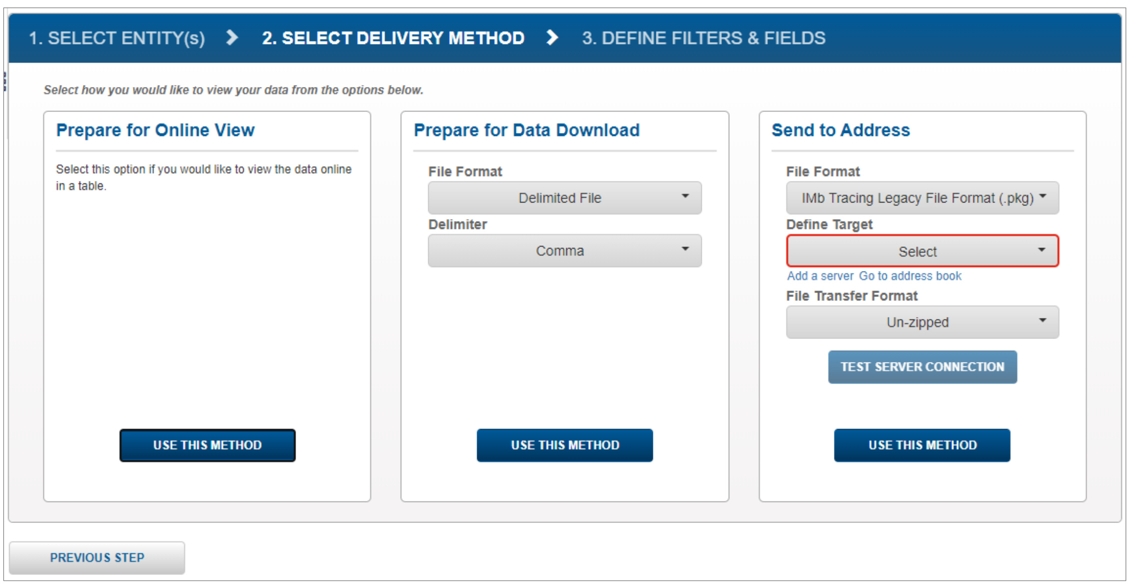


2. When you are finished, click **NEXT STEP**. Selecting entities is now complete. Proceed to the next section to select your delivery method.



7.4 Selecting a Delivery Method

The third step in creating a one-time query is to choose a delivery method for the results. There are three options available for one-time queries, as described in the table below. Instructions for choosing each method are provided in the following sections.



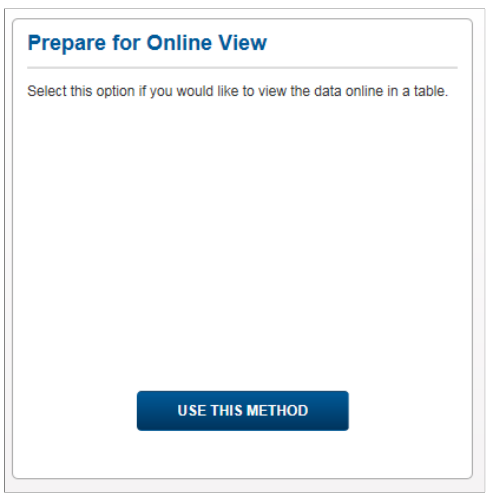
Method	Description	Restrictions	Instructions Provided in Section
Prepare for Online View	The application displays the query results directly in your web browser, sometimes using the Mail Object Navigator. You can export the data if desired.	Only container and handling unit data is available through this delivery method Displays a maximum of 10,000 records	7.4.1
Prepare for Data Download (Online Download)	The application prepares a file or files of the query results in your selected format for you to download.		7.4.2
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.	7.4.3

Detailed information about the data and files available for each method is available in Section 3: *Data Provisioning Options*.

7.4.1 Prepare for Online View

The online view option allows you to view your query results on-screen, without having to download anything. More details about online view results are provided in Section 3.3.1: *Online View*.

To use online view, go to the **Prepare for Online View** section and click **Use This Method**.



Your delivery method has been selected. Proceed to Section 7.5: *Defining Filters & Fields* to define your filters and fields.

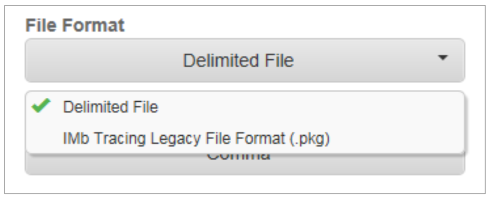
7.4.2 Prepare for Data Download

The data download option prepares a file with your query results that is available within the application. You can download that file at your leisure, up to 72 hours after it has been generated. Files are available in two formats:

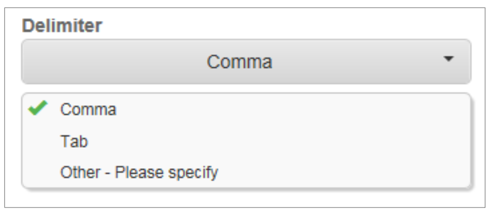
- **Delimited File:** Customizable format in which you select the data fields, order of fields, and delimiter character (see Section 3.3.3: *Delimited (TXT) File* for details)
- **IMb Tracing Legacy File Format:** Legacy IMb Tracing format with pre-defined data fields (see Section 3.3.2: *IMb Tracing Legacy PKG File* for details)
    - **Note:** This format only supports piece-level data. For other mail object data (including bundle and container), choose the delimited file format.

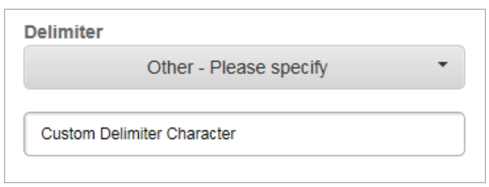
To use data download, go to the **Prepare for Data Download** section and follow these steps:

1. Choose a file type from the **File Format** drop down menu.

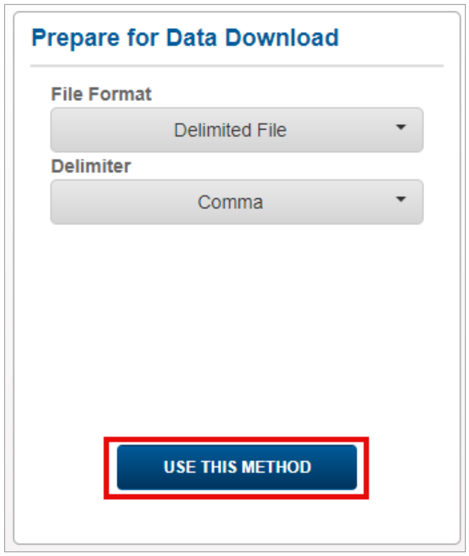


    a. If you choose Delimited, select a character from the **Delimiter** drop down to use. If you select Other as your delimiter, a field will appear for you to enter your desired character.





2. Click **USE THIS METHOD**. Your delivery method has been selected. Proceed to Section 7.5: *Defining Filters & Fields* to define your filters and fields.



7.4.3 Send to Address

The send to address option prepares a file with your query results and sends it to the server of your choosing. Files are available in two formats:

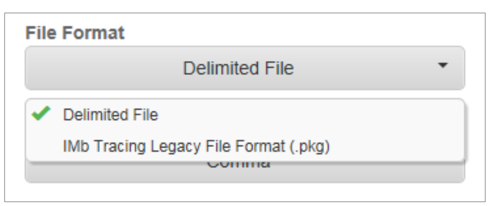
- **Delimited File:** Customizable format in which you select the data fields, order of fields, and delimiter character (see Section 3.3.3: *Delimited (TXT) File* for details)
- **IMb Tracing Legacy File Format:** Legacy IMb Tracing format with pre-defined data fields (see Section 3.3.2: *IMb Tracing Legacy PKG File* for details)
  - **Note:** This format only supports piece-level data. For other mail object data (including bundle and container), choose the delimited file format.

Important:

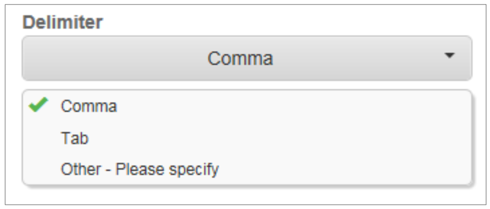
- The send to address option is only available for IV-MTR BSAs, BSA Delegates, or Subscription Managers.
- Target servers must be configured within the IV-MTR application before they can be selected.

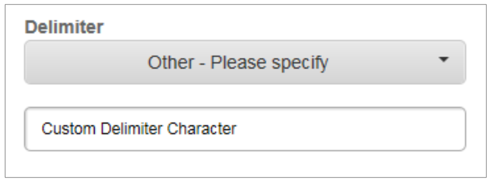
To use send to address, go to the **Send to Address** section and follow these steps:

1. Choose a file type from the **File Format** drop down menu.

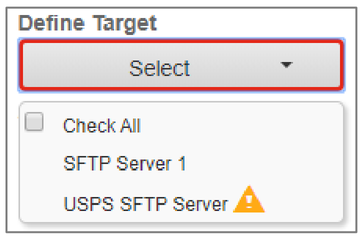


a. If you choose Delimited, select a character from the **Delimiter** drop down to use. If you select Other as your delimiter, a field will appear for you to enter your desired character.





2. Choose one or more server(s) to send the file to using the **Define Target** drop down menu.



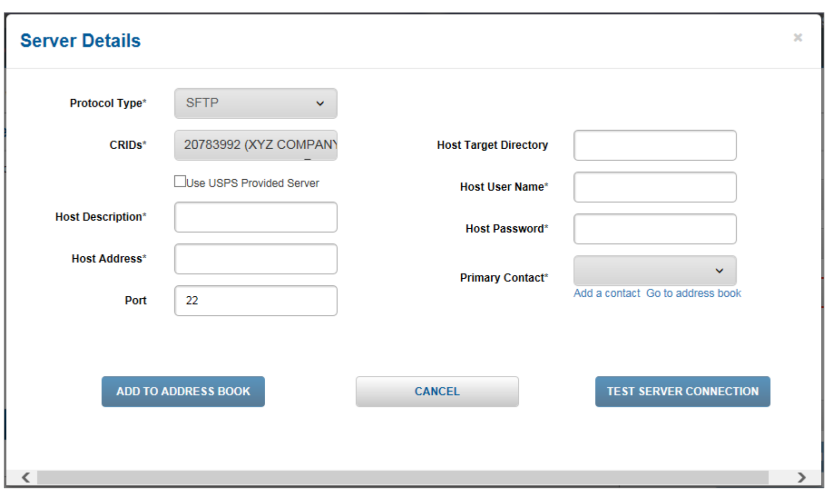
- **Note:** The Define Target drop down menu displays servers that are already configured in IV-MTR. If you want to use a new server, choose one of the following options to add it to IV-MTR:

  a. **Add a Server** – Click the **Add a Server** link to open a popup that allows you to add the server without leaving the page.

     i. Fill in the fields as appropriate, then click **Add to Address Book**.

     - **Note:** If you receive a message about using a non-standard port or USPS-provided server, see Section 10.1.3: *Special SFTP Scenarios*.

     ii. Open the **Define Target** drop down and choose the new server, then proceed to the next step.



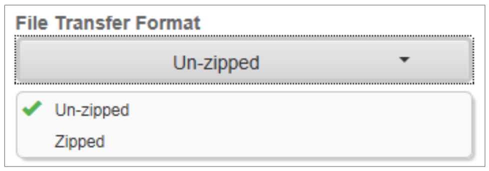
   b. **Go to Address Book** – Click the **Go to Address Book** link if you would like to add the server from the Address Book area of the application. See Section 10: *Address Book* for instructions.

      - **Note**: Choosing this option directs you to a new page without saving your progress. After you have finished adding the server, you will need to restart the query from the beginning.

3. Choose how you want to receive your files in the **File Transfer Format** drop down:

   a. **Zipped** = Small, compressed file that needs to be extracted before it can be used

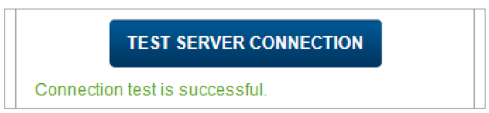
   b. **Unzipped** = Larger, uncompressed file that is ready to use



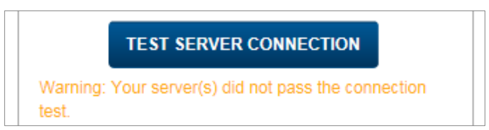
Note: Your selection here only determines how files will be sent to your server. If you decide to re-download a file later through the application web interface, the file will download as zipped by default.

4. ***Optional:*** If you would like to test the application's connection to the server(s) you chose, click **TEST SERVER CONNECTION**.

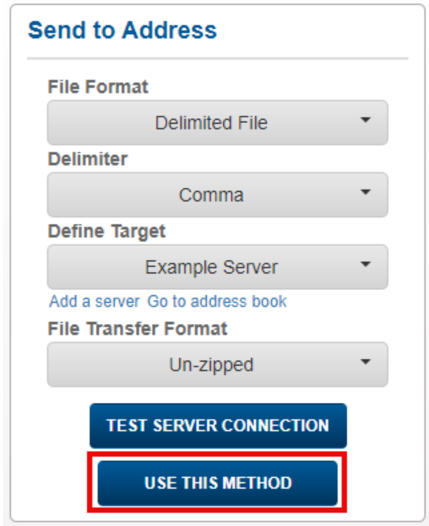
   - If the test is successful, a message displays confirming the test was successful.



   - If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV Solutions Center for additional assistance.



5. Click **USE THIS METHOD**. Your delivery method has been selected. Proceed to Section 7.5: *Defining Filters & Fields* to define your filters and fields.



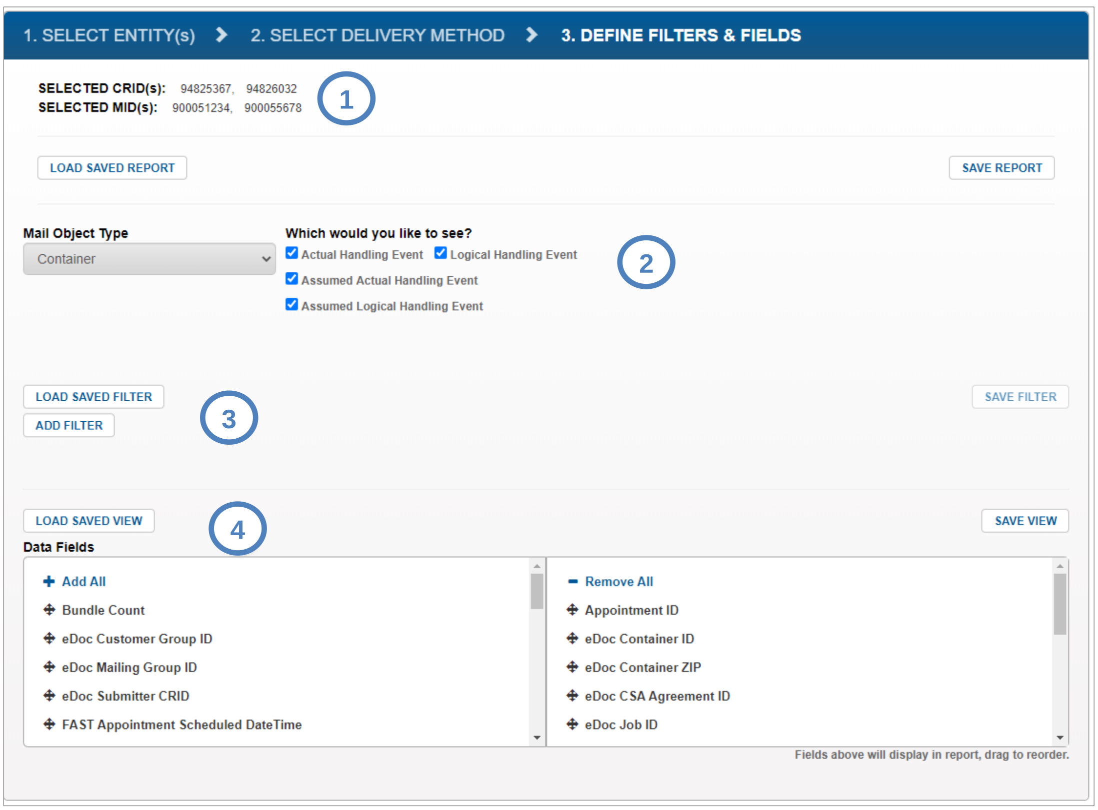
7.5 Defining Filters & Fields

The fourth step in creating a one-time query is to choose the data filters and fields you are interested in. The options available on screen vary based on selections you have already made and some selections you will make on this screen.

In general, the screen is broken into four sections:

1. **The Entity section** lists all the entities you have selected in the previous sections.
2. **The Mail Object Type section** allows you to set the mail object for the query.
3. **The Filter section** allows you to choose what data you would like to receive. This view varies based on the Mail Object Type selected.
4. **The Data Fields section** allows you to choose the exact data fields you want to receive and the order you would like them to be in. Available fields vary based on the filters and delivery method you have chosen.

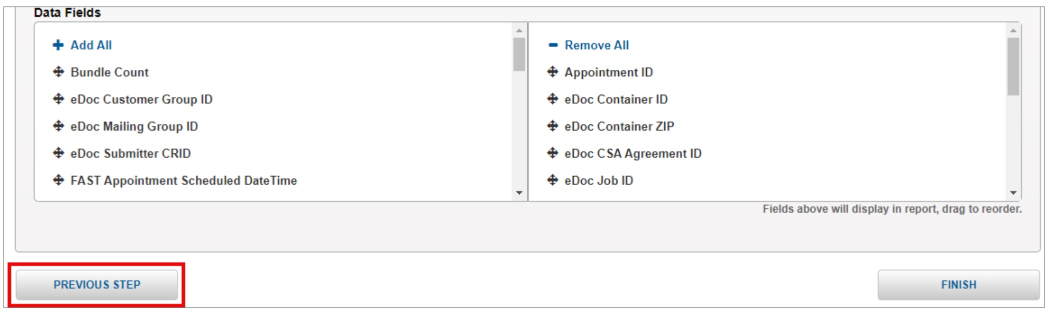
Information about each section is provided below.



7.5.1 Reviewing Entities

The CRID(s), MID(s), and Routing Code(s) you selected to include in the query are displayed in the Entity section. Review this section for errors.

- **If your entities are correct,** proceed to the next section.
- **If you need to make any changes,** click the **PREVIOUS STEP** button at the bottom of the table.



7.5.2 Choosing a Mail Object Type

The Mail Objects available depend on the entities and delivery method you have selected. Not all choices are available for all delivery methods and entities. Use the chart below to select your mail object type.

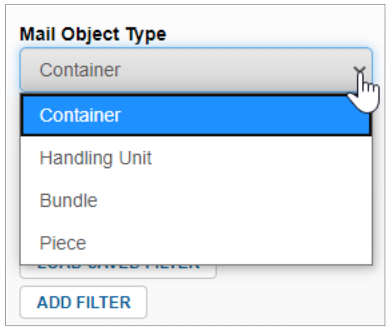
If you are interested in data* for…	Proceed to Section…
Containers, Bundles, or Handling Units,	7.5.2.1: *Container-, Handling Unit-, and Bundle-Level Queries*
Mail Object Navigator (Online View option that allows you to drill down from Containers to their nested Handling Units),	7.5.2.2: *Mail Object Navigator Queries*
Pieces	7.5.2.3: *Piece-Level Queries*
*You can only choose one Mail Object Type per query. If you would like information for more than one Mail Object Type, you'll need to create separate queries.	

To use a Saved Report or Saved Filter, see Section 13: *Saved Reports*.

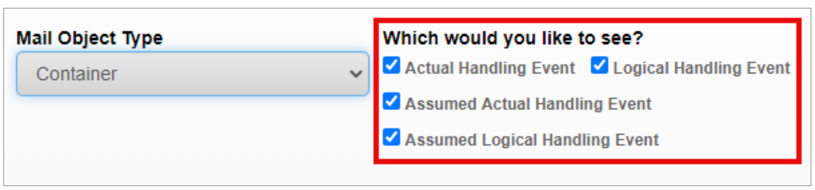
7.5.2.1 Container-, Handling Unit-, and Bundle-Level Queries

To select a Mail Object Type for a Container, Handling Unit, or Bundle-level query, follow these steps:

1. In the **Mail Object Type** drop down, select the desired mail object.
    - Note that the options available here vary based on the delivery methods and entities chosen. For details of all the options available, see Section 3.3.



2. The **Which would you like to see?** section allows you to choose the types of events you can receive. By default, all event types available for the mail object type are checked.
    - For a description of the events available, see Section 3.4, Appendix E.2, and Appendix E.3
    - If you do not wish to receive an event type, **uncheck** its box.



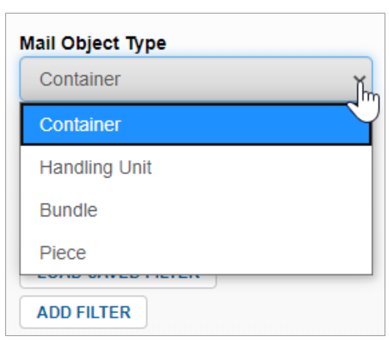
Selecting the Mail Object Type is now complete. Proceed to Section 7.5.3: *Setting Filters* to add filters.

7.5.2.2 Mail Object Navigator Queries

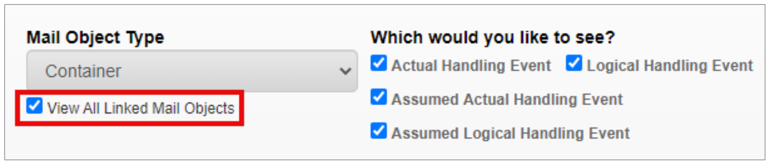
The mail object navigator allows you to view handling events for containers and drill down to view the handling units nested to them. You can also view handling events for the nested handling units. The handling information displays on the screen with the ability to export.

To select a Mail Object Type for a Mail Object navigator query, follow these steps:

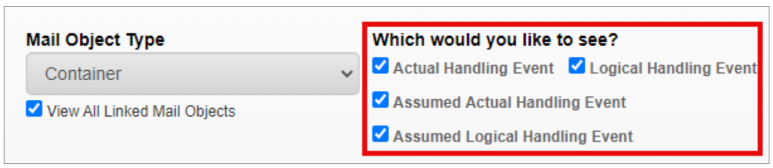
1. In the **Mail Object Type** drop down, select **Container**.



2. In the **View All Linked Mail Objects** check box under the Mail Object Type drop down, **check** the box.



3. The **Which would you like to see?** section allows you to choose the types of events you can receive. By default, all event types available for the mail object type are checked.
   - For a description of the events available, see Section 3.4, Appendix E.2, and Appendix E.3
   - If you do not wish to receive an event type, **uncheck** its box.

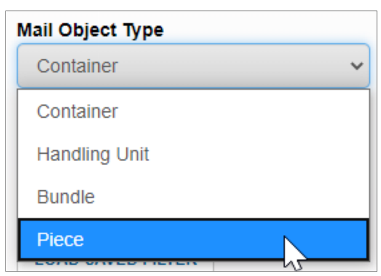


Selecting the Mail Object Type is now complete. Proceed to Section 7.5.3: *Setting Filters* to add filters.

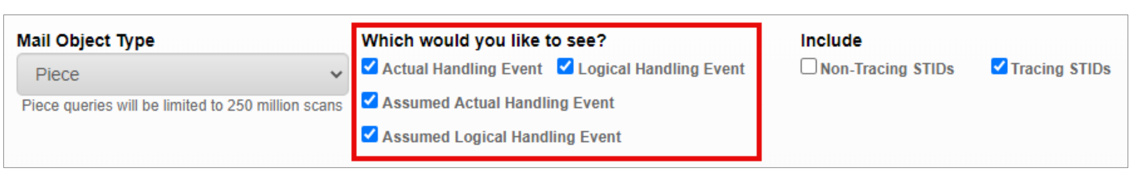
7.5.2.3 Piece-Level Queries

To select a Mail Object Type for a Piece-level query, follow these steps:

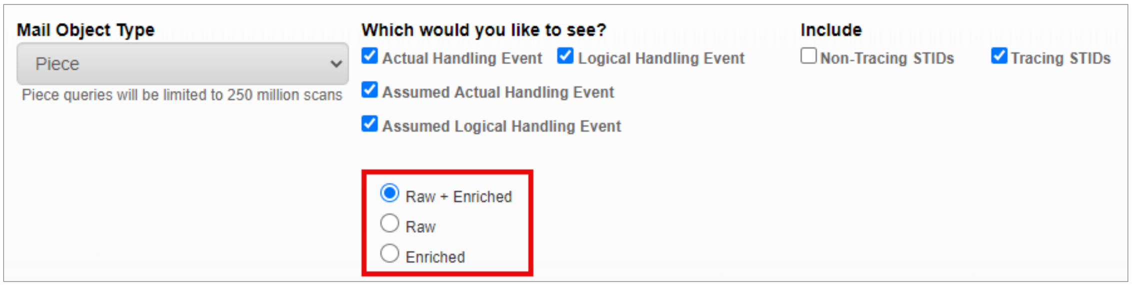
1. In the **Mail Object Type** drop down, select **Piece**. The section will automatically update with additional filters.
   - Note that the options available here vary based on the delivery methods and entities chosen. For details of all the options available, see Section 3.3.



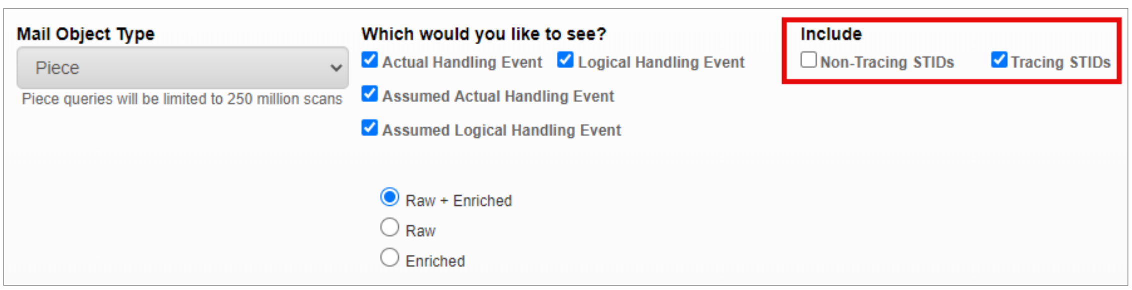
2. The **Which would you like to see?** checkbox section allows you to choose the types of events you can receive. By default, all event types available are checked.
   - For a description of the events available, see Section 3.4, Appendix E.2, and Appendix E.3
   - If you do not wish to receive an event type, **uncheck** its box.



3. ***Delimited Files Only:*** The **Which would you like to see?** radio button section allows you to choose the types of scans you can receive. By default, all scans (Raw + Enriched) are selected.
    - For a description of the events available, see Section 3.4
    - If you wish to select a specific scan type, **click** its radio button.



4. The **Include** section allows you to choose the types of STIDs that will be included in the query. By default, only Tracing STIDs are selected.
    - For a list of Tracing and Non-Tracing STIDs, see the STID Table on PostalPro. In the table, the columns labeled “with IV MTR” are the Tracing STIDs.
    - If you wish to add or change the STID type, **check** or **uncheck** the appropriate box.



5. The **Required Filter** section allows you to choose the dates for the query. In the **Field Value** fields, enter the **start** and **end dates**.
    - Piece-level queries are available for a maximum timeframe of 14 days (inclusive). If you would like data for a longer time period, you’ll need to create additional queries.
    - Further information about piece-level one-time queries can be found in Appendix K

Selecting the Mail Object Type is now complete. Proceed to Section 7.5.3: *Setting Filters* to add filters.

7.5.3 Setting Filters (Optional)

The Filters section allows you to further customize the results you will receive in the query. This step is optional – you do not have to add additional filters. If you do not want to add any filters, proceed to Section 7.5.4: *Choosing and Organizing Data Fields* to choose your data fields.

The filters available vary based on selections made in other steps of query set up. You may add as many filters as you like to a query.

Set up your filters using one of the following options:

A. Add your first filter

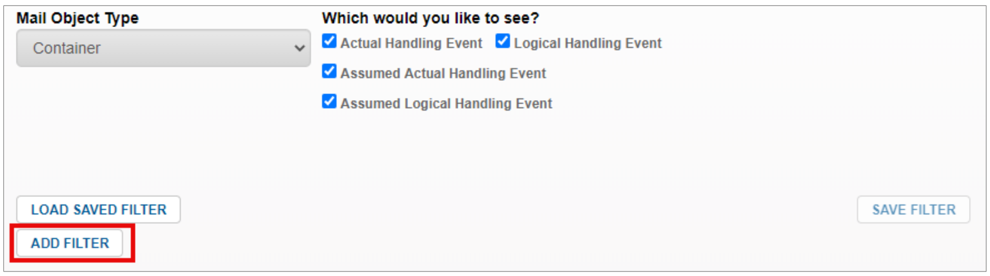
B. Add an additional filter

C. Remove a filter

Instructions for each option are provided below.

A. **To add your first filter,** follow these steps:

1. Click the **ADD FILTER** button. A filter section will appear with several fields.

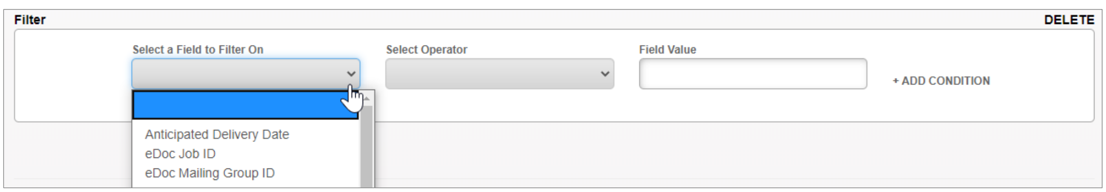


2. In the **Select a Field to Filter On** drop down, choose the field you would like to choose as a filter.

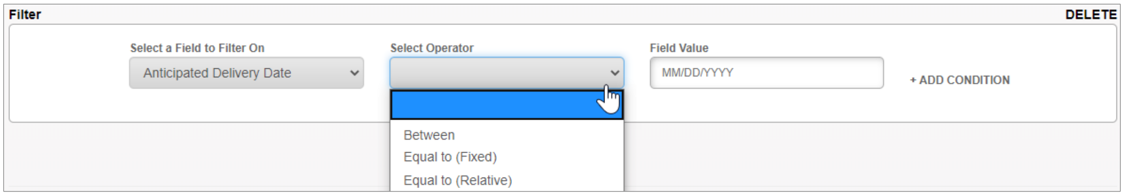
   - Notes:

     i. The fields available vary by mail object type.

     ii. Adding a *Scan DateTime* filter (if available) can shorten the required processing time for your query if you have a lot of records.



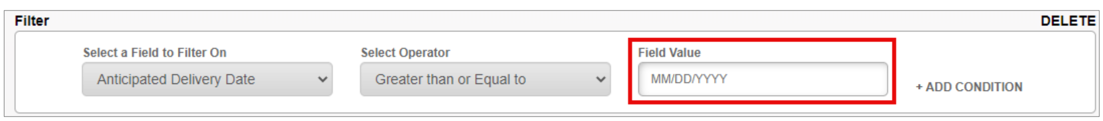
3. In the **Select Operator** drop down, select the condition you would like to use. Available operators may vary. The chart below provides useful information about which operator to choose.



Operator	Notes
Between	is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.
Contains, **Begins With**, **Ends With**, or **Does Not Contain**	Can be used to do partial searches
One of and *Not One of*	allow multiple field values

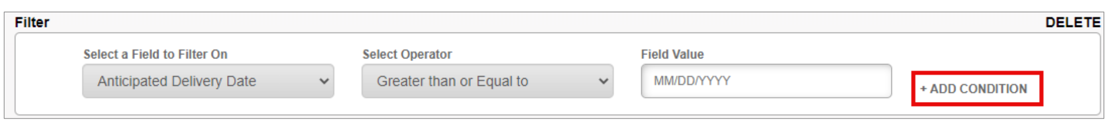
4. In the **Field Value** area, enter the desired value.

   - 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).

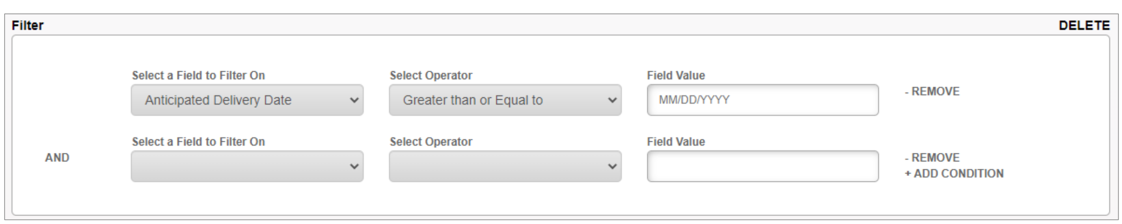


B. **To add additional filters**, follow these steps:

1. Click the **+ ADD CONDITION** link to the far right of your first filter.

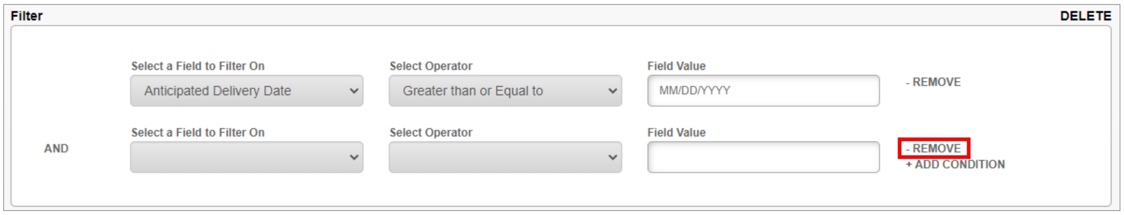


2. A new set of filter fields appears. Populate them following the steps for adding your first filter.

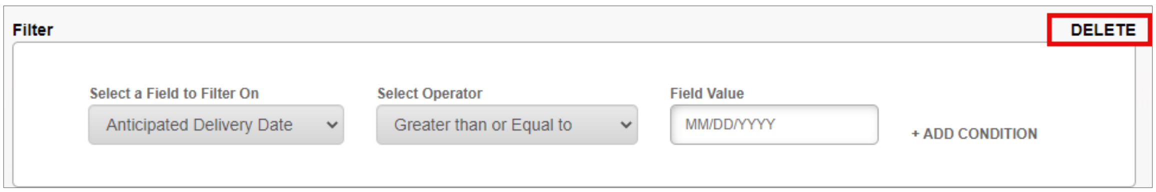


C. To remove filters, follow these steps:

1. **To remove an individual filter,** click the **- REMOVE** link to the far right of the filter.



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



Once you have finished adding all your filters, proceed to the next section to choose your data fields.

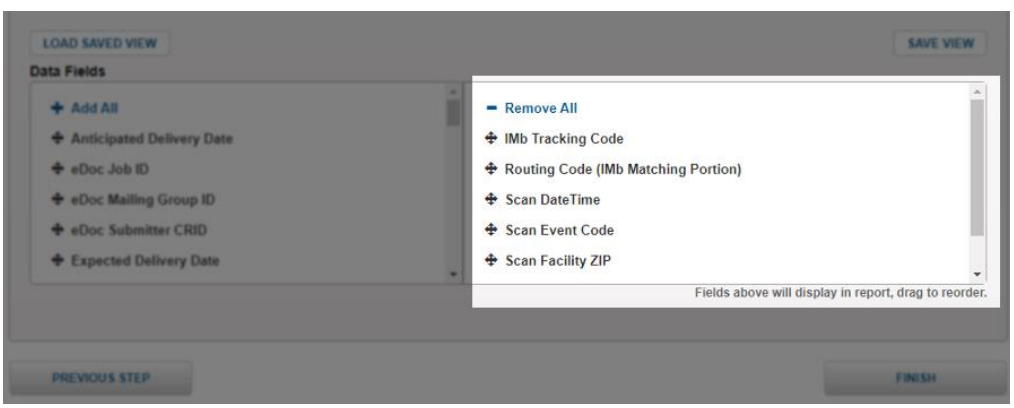
7.5.4 Choosing and Organizing Data Fields

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. Available fields will vary based on the mail object type and filters you selected. Detailed information about the data fields is available in the *IV-MTR External Facing Data Dictionary*.

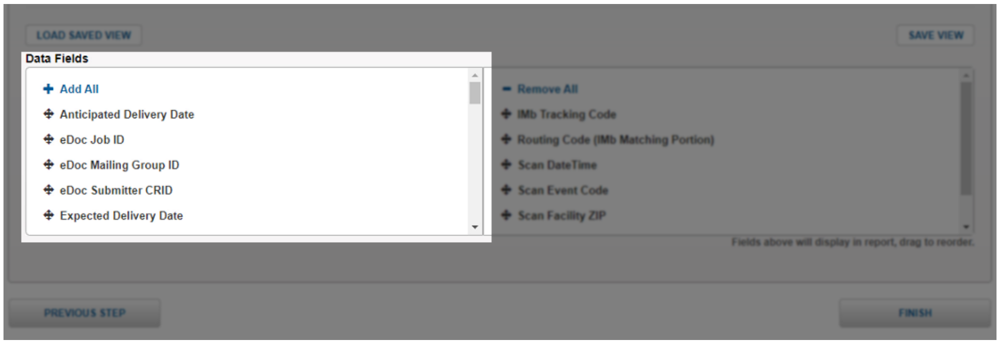
To use a Saved View, see Section 13.3: *Saved View*.

The Data Fields section is split into two parts:

- The right side displays the fields that will be included in your query.



- The left side displays the fields not currently included in your query.



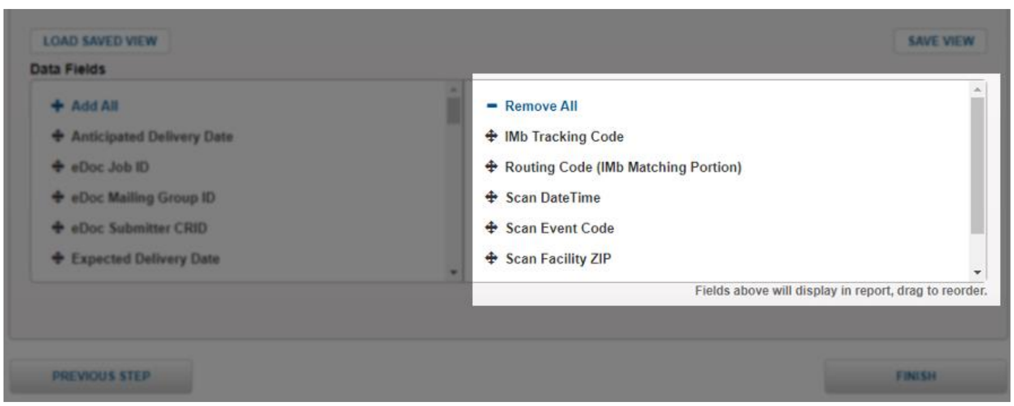
Instructions for choosing your fields varies by file type:

- **For Online View and Delimited files,** see 7.5.4.1*: Defining Fields for Online View & Delimited Files*
- **For Mail Object Navigator and IMb Tracing Legacy Package Files,** see 7.5.4.2: *Reviewing Fields for Mail Object Navigator and IMb* Tracing Legacy Package Files

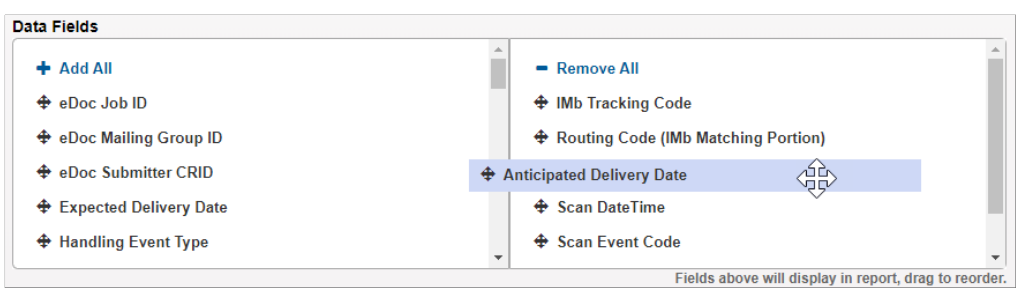
7.5.4.1 Defining Fields for Online View & Delimited Files

Choose and organize your fields as follows:

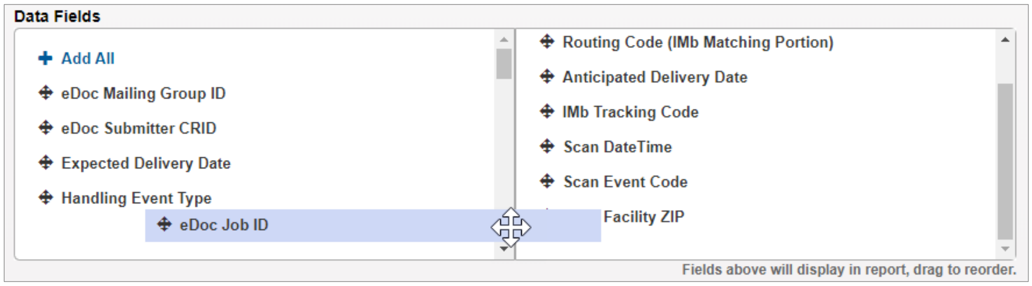
1. Review the fields included by default in the query by scrolling through the data fields listed on the right side of the screen.



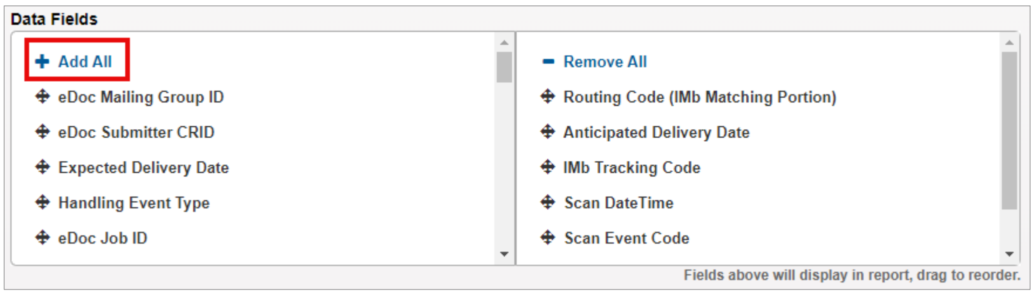
2. Add or remove fields as necessary for the list on the right:
    a. **To add a single field,** double-click it on the left list or drag it from the left list to the right list



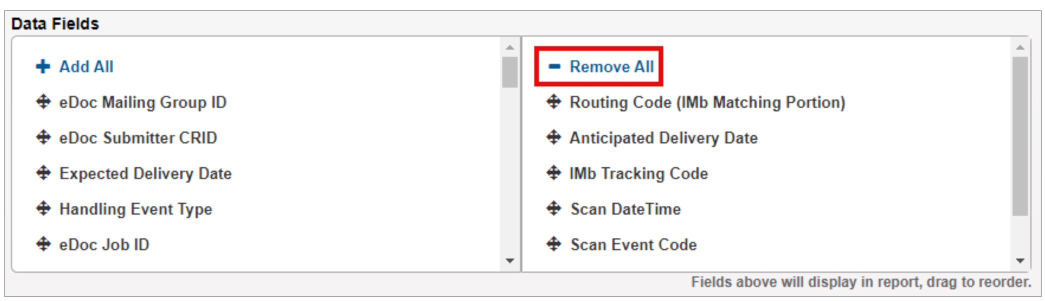
b. **To remove a single field,** double-click it on the right list or drag it from the right list to the left list



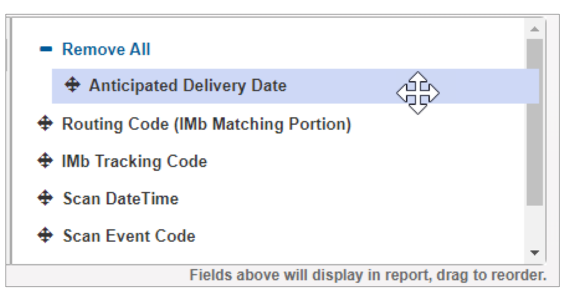
c. **To add all available fields,** click the **+ Add All** button at the top of the left list



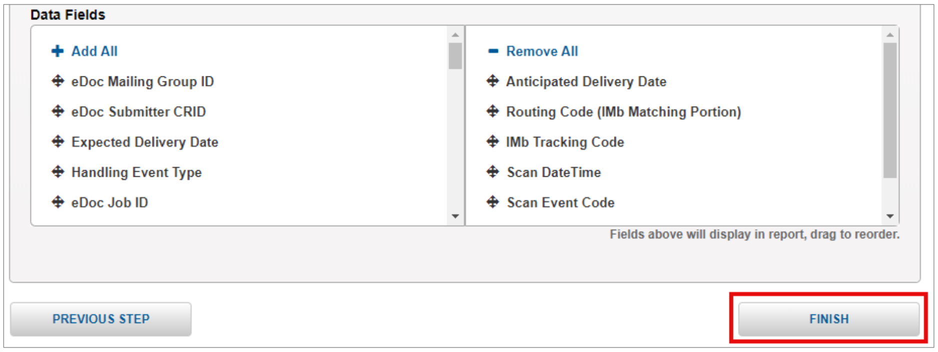
d. **To remove all selected fields,** click the **– Remove All** button at the top of the right list.



3. Organize the selected fields into the order you would like by dragging and dropping them up or down in the right list.



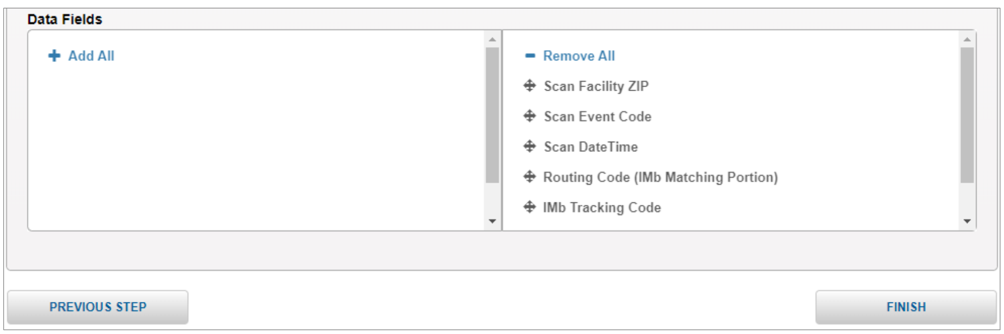
4. When you have finished organizing your fields and are ready to submit your query, click **FINISH**. Defining your filters and feeds is now complete. Proceed to Section 7.6: *Submitting Your Query*.



7.5.4.2 Reviewing Fields for Mail Object Navigator and IMb Tracing Legacy Package Files

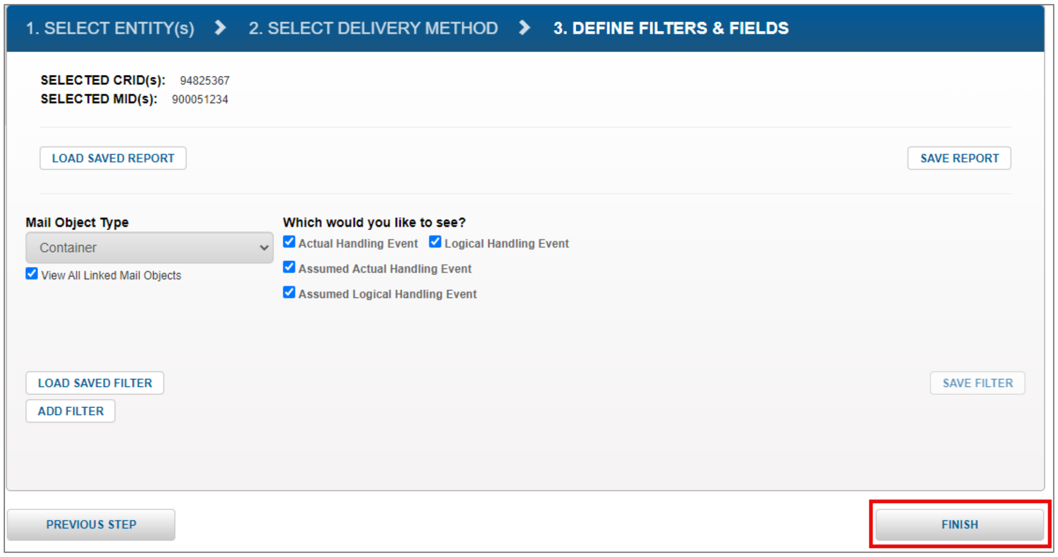
These one-time query methods have default sets of data that are provided in the results. You are unable to add or remove fields or rearrange the order in which they will appear. However, you can preview the data fields that will be in your results as follows:

- **For the IMb legacy package file format,** the data fields that are included are listed on screen.



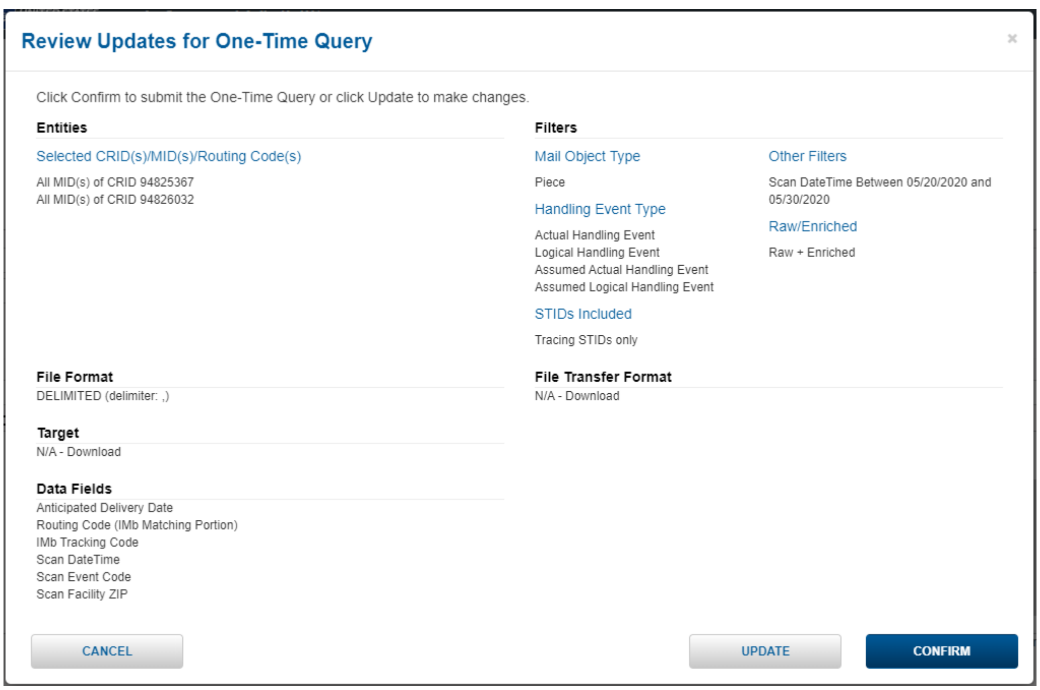
- **For Mail Object Navigator queries,** the data fields are not viewable on screen. A list of the data fields that will be provided is available in the Mail Object Navigator Data Fields reference on PostalPro.

When you are ready to submit your query, click **FINISH**. Defining your filters and feeds is now complete. Proceed to the next section.



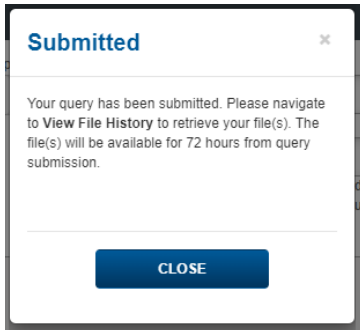
7.6 Submitting Your Query

The final step in creating a one-time query is to submit it. After clicking FINISH, 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**.
  - A popup will appear, confirming your query has been submitted. One-time query set up is now complete. Proceed to Section 7.7: *Retrieving One-Time Query Results* for instructions on retrieving your results.
    - **Note:** If you receive an error message, see Section 7.6.1: *Processing Queue Limits* for more information.



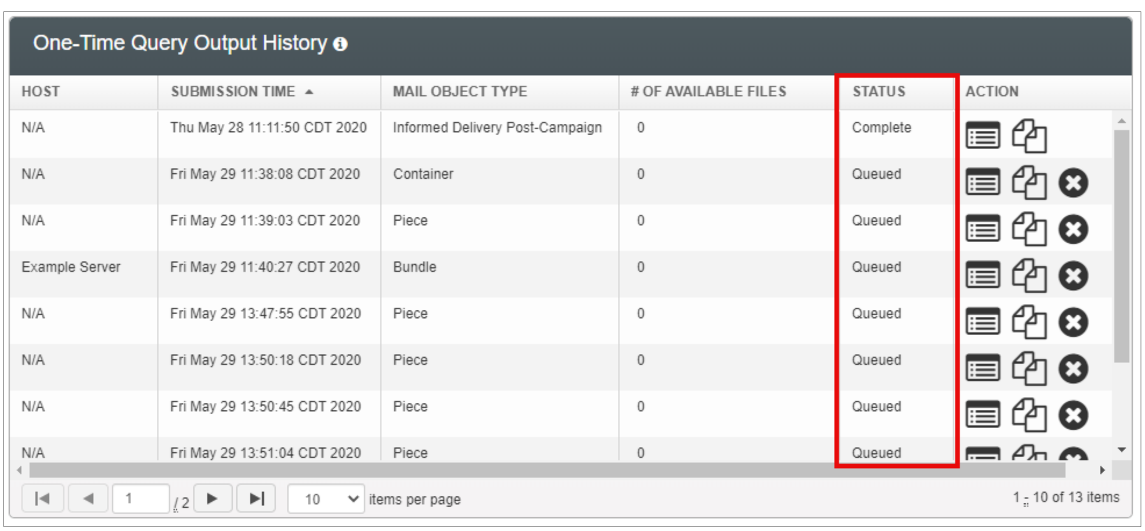
- **If you need to edit your query:**
  - Click **UPDATE**. You will be returned to the previous screen where you can make updates as needed.
- **If you want to discard this query and start over:**
  - Click **CANCEL**. You will be returned to the Select Entities screen, where you can begin a new one-time query if desired.

7.6.1 Processing Queue Limits

Once a query is submitted, it is added to the processing queue for your account. At any time, your processing queue can have:

- An unlimited number of container, handling unit, or bundle-level queries
- Up to 9 piece-level queries

Your queue is listed in the One-Time Query Output History table.

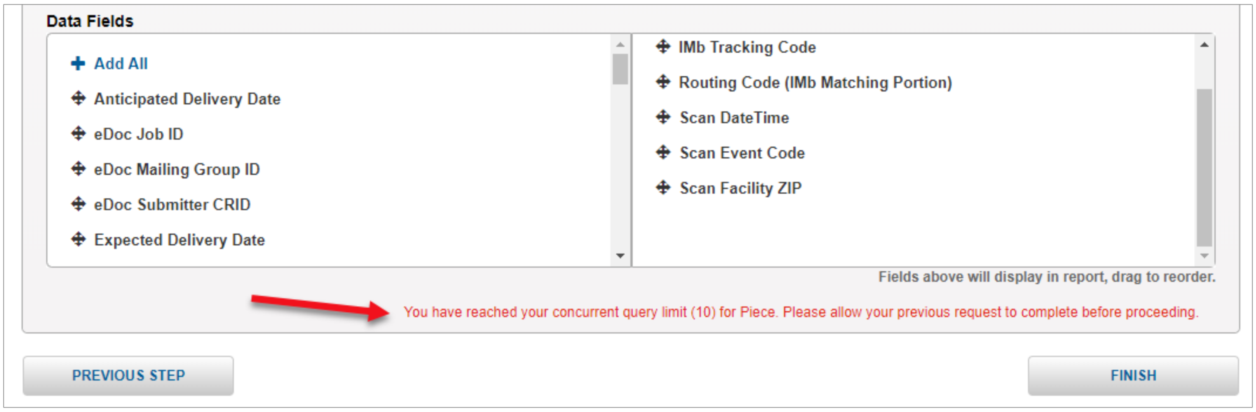


One-Time Query Output History

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	0	Complete	
N/A	Fri May 29 11:38:08 CDT 2020	Container	0	Queued	
N/A	Fri May 29 11:39:03 CDT 2020	Piece	0	Queued	
Example Server	Fri May 29 11:40:27 CDT 2020	Bundle	0	Queued	
N/A	Fri May 29 13:47:55 CDT 2020	Piece	0	Queued	
N/A	Fri May 29 13:50:18 CDT 2020	Piece	0	Queued	
N/A	Fri May 29 13:50:45 CDT 2020	Piece	0	Queued	
N/A	Fri May 29 13:51:04 CDT 2020	Piece	0	Queued	

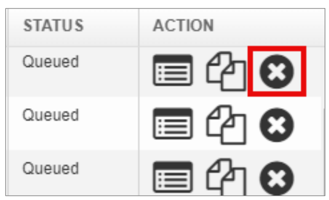
1 /2 10 items per page 1 - 10 of 13 items

If you attempt to add a tenth piece-level query to your processing queue, the following error message will appear:



To proceed, choose one of the following:

- **Wait** to submit your query until one of the existing piece-level queries is finished.
- **Cancel** one of the queries in the processing queue by clicking the icon. In the confirmation popup that appears, click **YES**. Then, re-submit your new query.



7.7 Retrieving One-Time Query Results

After a query has been submitted, it is placed in the processing queue for your account. Once it has been processed, you will be notified per your notification settings (see Section 12: *Notifications* for details).

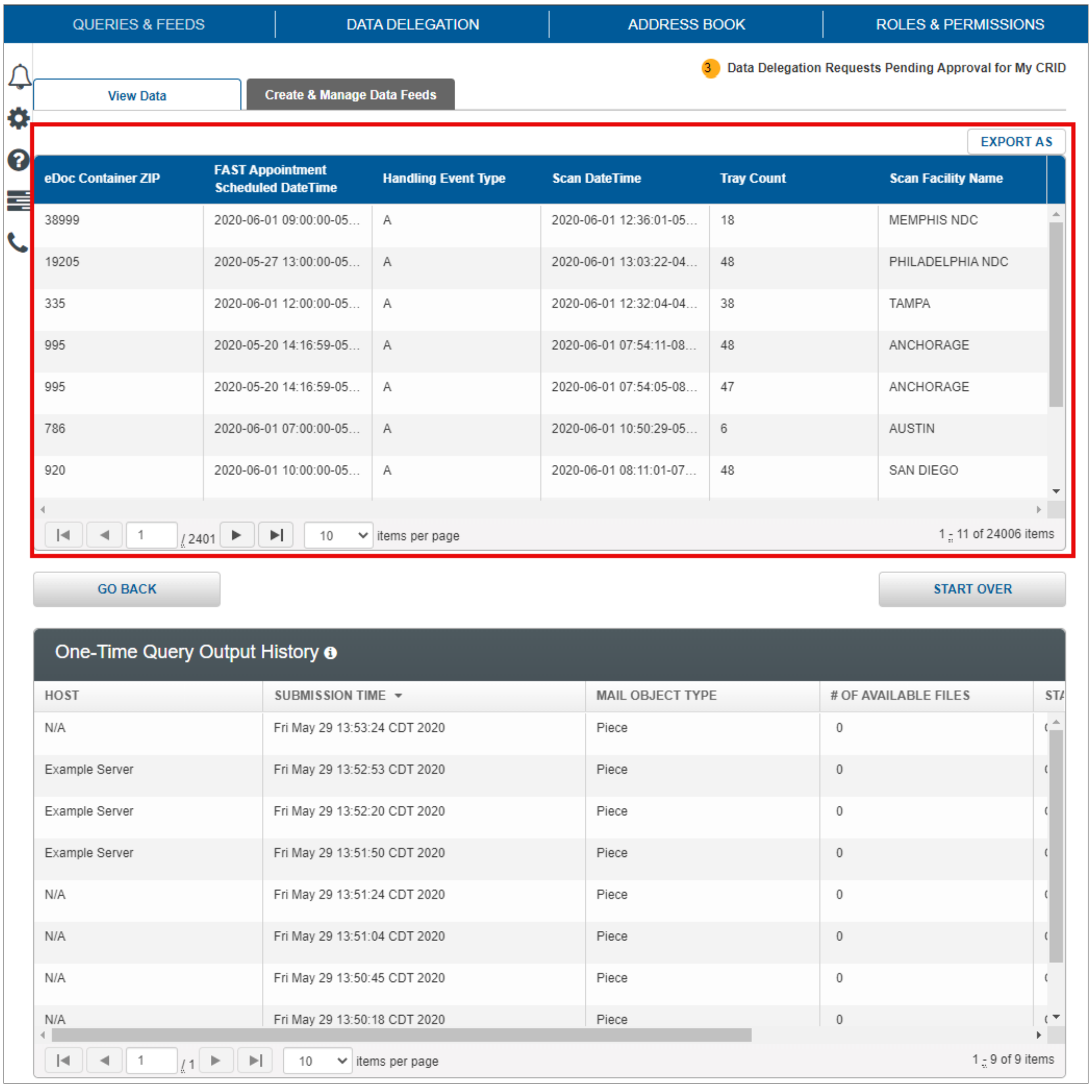
The steps for retrieving your query results depends on the delivery method you selected during set up. Use the table below to proceed.

Delivery Method	Instructions
Online View	Section 7.7.1
Data Download	Section 7.7.2
Send to Address	Section 7.7.2

7.7.1 Online View

If you chose Online View, your results will be available immediately. An Online Viewer table appears on the Queries & Feeds page and displays the records.

- **For Mail Object Navigator queries,** see 7.7.1.2: *Reviewing Mail Object Navigator Results*
- **For Container, Bundle, or Handling Unit queries,** continue with this section.



The Online Viewer displays up to 10,000 records. Records shown are the most recent scan records, as determined by the *Scan DateTime*.

- Notes:
  - It may take a few seconds for data to appear.
  - If no records are available, a “No Data Found” message will be displayed.

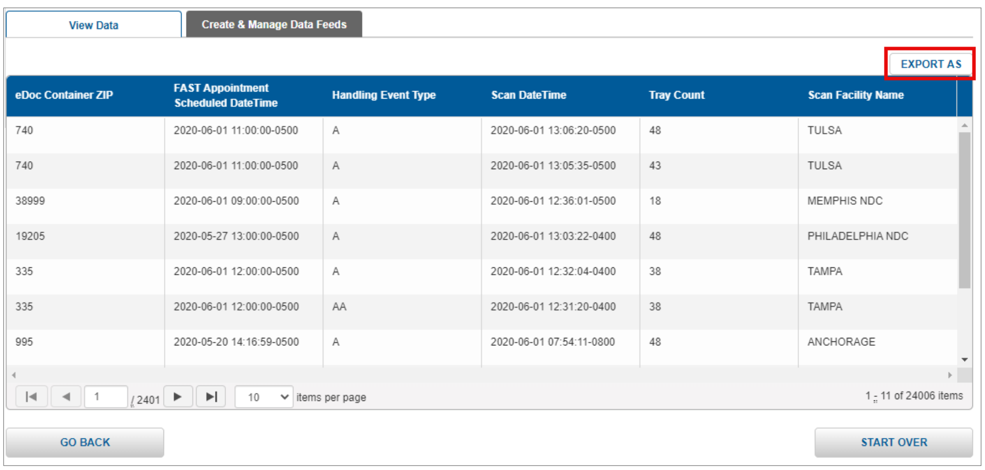
In the Online Viewer, you can do the following:

- **Review the results** by scrolling and paging through the results
    - For information and resources related to understanding the results, see Section 7.8: *Interpreting One-Time Query Results*
- **Export your results** by using the export option (see instructions below)
- **Edit your query** by clicking the **GO BACK** button
- **Start a new query** by clicking the **START OVER** button

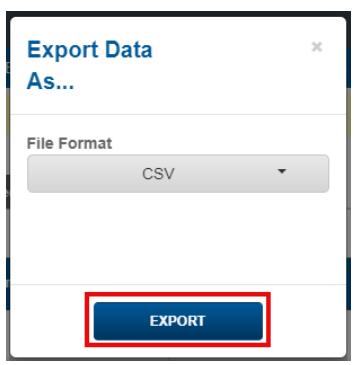
7.7.1.1 Exporting Online View Results

The results of Online View one-time queries are not saved in the application. If you would like to save or download the results of the query for further review, follow these steps:

1. Click the **EXPORT AS** button on the top right corner of the viewer.



2. A popup will appear that allows you to choose the file type for your results. Once you have selected a file type, click **EXPORT**.
    - If you want to import the records into Excel, choose CSV

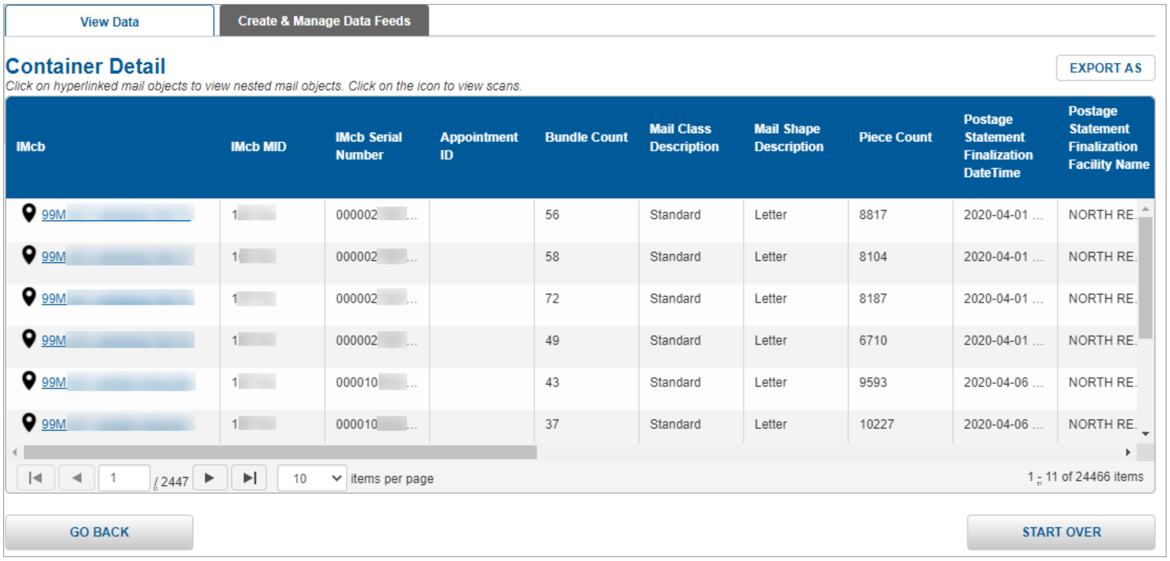


3. The file will download to your local system. This may take a few minutes, depending on the number of records your query returned.
    - If you need instructions for importing CSV files into Excel, see Appendix F: *Import CSV or TXT File into Microsoft Excel*.

7.7.1.2 Reviewing Mail Object Navigator Results

The Online Viewer displays up to 10,000 records. Records shown are the most recent scan records, as determined by the *Scan DateTime*.

- Notes:
    - It may take a few seconds for data to appear.
    - If no records are available, a "No Data Found" message will be displayed.



The Mail Object Navigator provides the following drill-down levels:

A. **Container Detail** – Allows you to see the containers that met your query criteria

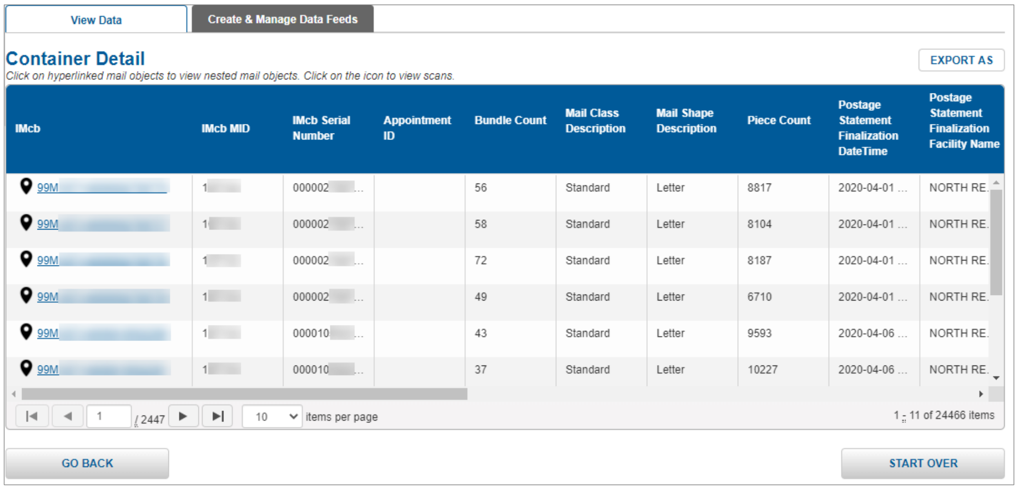
B. **Container Scan Detail** – Allows you to see the handling events a container reviewed during processing

C. **Handling Unit Detail** – Allows you to see the handling units nested to a specific container

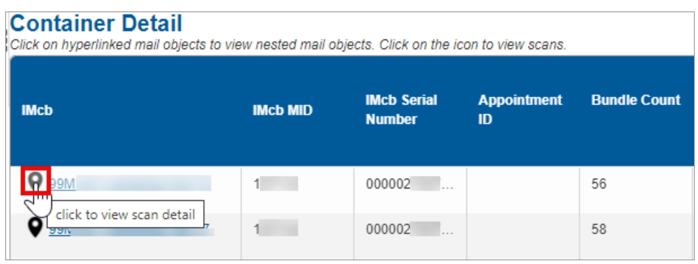
D. **Handling Unit Scan Detail** – Allows you to see the handling events for a specific handling unit

Instructions for accessing each drill down level are provided below. For information and resources related to understanding the results, see Section 7.8: *Interpreting One-Time Query Results*

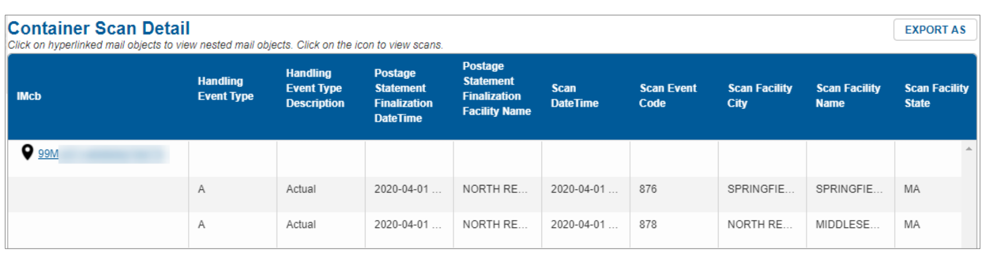
1. **To view the Container Detail –** *Container Detail* is the highest-level view of Mail Object Navigator. After you submit your query, the *Container Detail* view appears. Use the controls to scroll and page through your results and see the containers that matched your query.
    a. To export the events for this view, follow the instructions in Section 7.7.1.1: *Exporting Online View Results*
    b. To edit your query, click the **GO BACK** button
    c. To start a new query, click the **START OVER** button



2. **To view Container Scan Detail –** From the *Container Detail* view:
    a. Locate the container you are interested in and click the icon in the IMcb column.

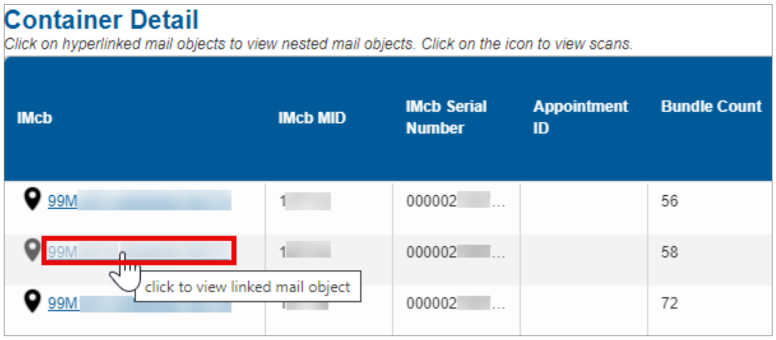


    b. The *Container Scan Detail* view will appear, listing the handling events for that particular container.
        i. To export the events for this view, see Section 7.7.1.1: *Exporting Online View Results*
        ii. To return to the *Container Detail* view, click the icon again.



3. **To view Handling Unit Detail –** From the *Container Detail* view:

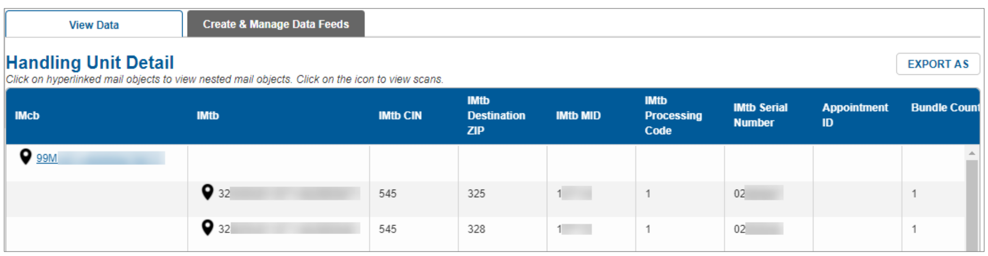
   a. Locate the container you are interested in and click the IMcb hyperlink.



   b. The *Handling Unit Detail* view appears, listing the handling units nested to that container.

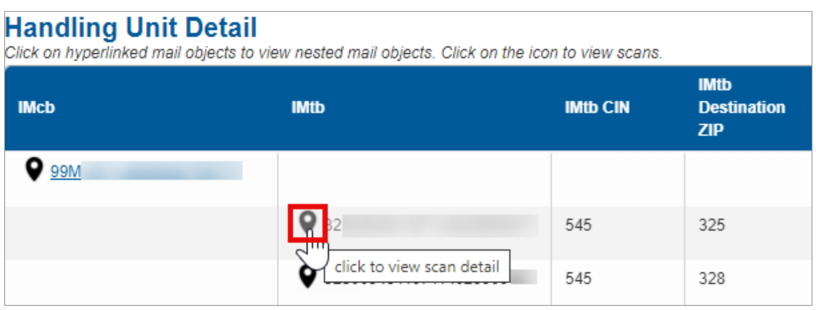
      i. To export the events for this view, see Section 7.7.1.1: *Exporting Online View Results*

      ii. To return to the *Container Detail* view, click the icon in the IMcb column again.



4. **To view Handling Unit Scan Detail** – From the *Handling Unit Detail* view:

   a. Locate the handling unit you are interested in and click the icon in the IMtb column.



b. The *Handling Unit Scan Detail* view appears, listing the handling events for that particular handling unit.

   i. To export the events for this view, see Section 7.7.1.1: *Exporting Online View Results*

   ii. To return to the *Handling Unit Detail* view, click the icon in the IMtb column again.

Handling Unit Scan Detail

Click on hyperlinked mail objects to view nested mail objects. Click on the icon to view scans.

EXPORT AS

IMcb	IMtb	Handling Event Type	Handling Event Type Description	Scan DateTime	Scan Event Code	Scan Facility City	Scan Facility Name	Scan Facility State
99M								
	32							
		AA	Assumed Ac...	2020-04-02 ...	878	JERSEY CITY	NEW JERS...	NJ
		AA	Assumed Ac...	2020-04-01 ...	878	NORTH RE...	MIDDLESE...	MA

7.7.2 One-Time Query Output History (Data Download & Send to Address)

If you chose Data Download or Send to Address, your results will be available after they have processed.

Query Processing

- **Timing:** Depending on the parameters selected for the query, it may take several minutes for the file to be available to download.
  - To help improve the performance of the query, it may be helpful to add a filter for the *Scan DateTime* field during query set up.
- **Notifications** (Data Download only): In-app and email notifications are available to let you know when the file is ready. For information about these notifications, see Section 12: *Notifications*.

Query Output

Data Download and Send to Address files for scan data contain a maximum of 100,000 records. If your query returns more than 100,000 records, multiple files will be created.

Both Data Download and Send to Address query results are available for download on the Queries & Feeds page in the **One-Time Query Output History** table.

- Data 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.

Important: One-Time Query files are retained in the One-Time Query Output History table for 72 hours.

To access a query in the table:

1. Locate its entry in the One-Time Query Output History table. The table lists the following information:

    a. **Host:** Host Description for the selected target location(s) (applicable for the Send to Address only)

    b. **Submission Time:** Date and time the one-time query was submitted

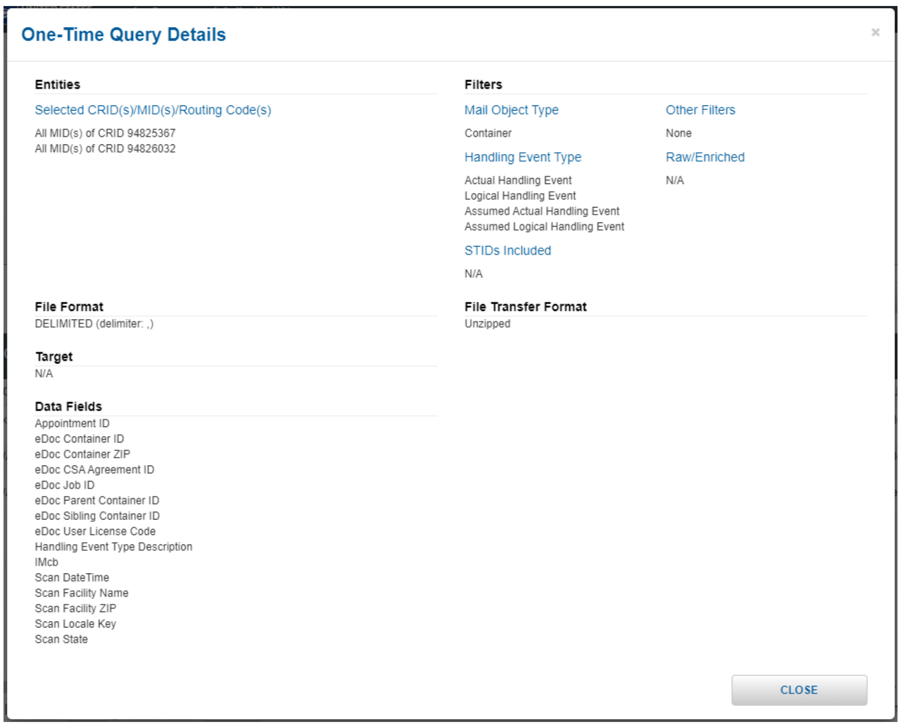
    c. **Mail Object Type:** Mail object type (e.g., container) for which data was requested

    d. **# of Available Files:** Number of files created for the query results

    e. **Status:** Indication of whether the query has finished processing or not

    f. **Action:** Allows you to review, see results of, or cancel a query (details below).

2. **To review the settings and details of a query:** In the Action column, click the Details icon. A screen listing the details for that query will appear.



3. **To view the results of a query:** In the Action column, click the Files icon. The Available Files window appears, listing all the result files for the query.

    a. Locate the file you want to review. The table lists the following information:

        i. **File Name:** Name of the results file. For information on file naming conventions, see Appendix I and Appendix J.

        ii. **Total Scans:** The number of handling events contained in the file.

        iii. **Download Time:** Displays the timestamp of when the file was last downloaded. This field populates once the file has been downloaded.

        iv. **Most Recent Attempt:** Populated for Send to Address only. Date/Time stamp of the most recent attempt to send the file to the target location(s)

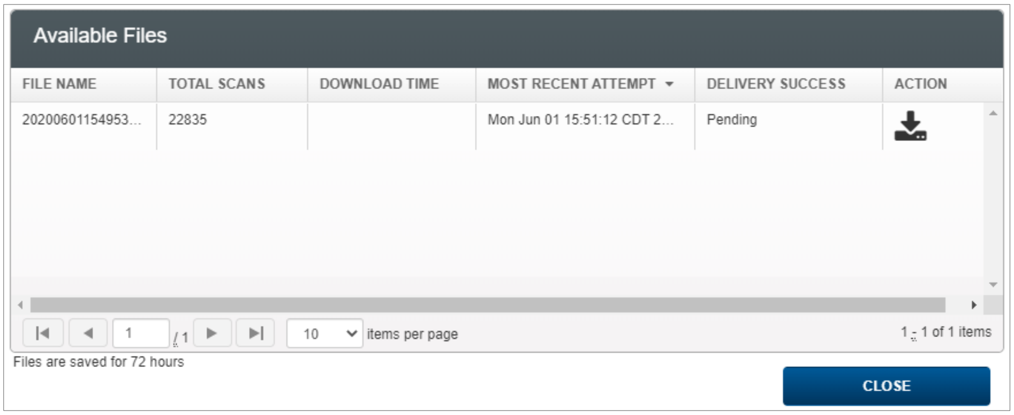
v. **Delivery Success:** Populated for Send to Address only. Indicates whether the Most Recent Attempt was delivered successfully or not.

vi. **Action:** Allows you to download or resend a file (details below).

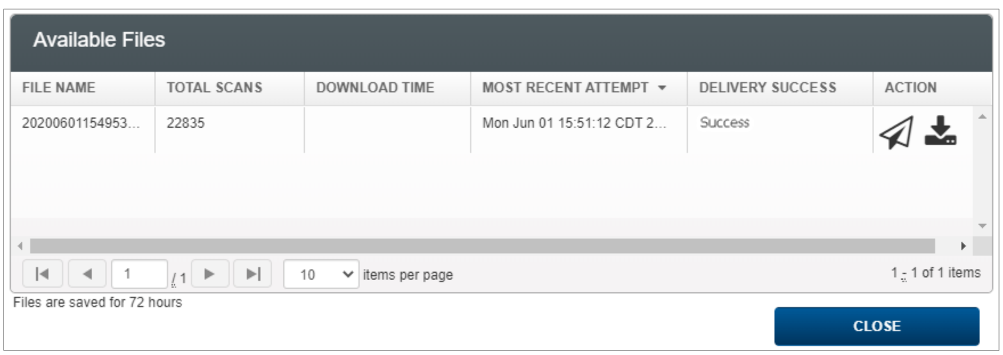
b. **To download the results:** In the Action column, click the Download icon. The file will download to your local drive according to your browser settings.

i. All files downloaded from the One-Time Query Output History table are zipped.

ii. For instructions on importing files into Excel, see Appendix F.



c. **To resend a file (Send to Address Only):** In the Action column, click the Resend icon. The application will attempt to resend the file to the target location.



4. **To cancel a query:** follow the instructions in Section 7.6.1: *Processing Queue Limits*. Note that you cannot cancel a query that is in progress, complete, or failed.

7.8 Interpreting One-Time Query Results

For information about the data provided in one-time queries, please see the following resources:

- For information about mail flow and scan data, see Section 15: *Understand Mail Flow and Interpret Scan Data*.
- For a list of the data fields and their definitions available via online view, online download, and send to address, see the IV-MTR External Data Dictionary on PostalPro.
- For a list of the data fields available via Mail Object Navigator, see the Mail Object Navigator Data Fields reference on PostalPro.
- For the current list of Operation Codes, see the Operation Codes reference on PostalPro.
- For a list of Machine Types and their definitions, see the Machine List reference on PostalPro.

8 Data Feeds

Important:

- A data feed only delivers handling events going forward from the time the feed is activated. To receive historical data, you can perform a one-time query.
- In general, only data for Tracing STIDs is available through a data feed. For the list of Tracing and non-Tracing STIDs, see the STID Table on PostalPro. In the table, the columns labeled "with IV MTR" are the Tracing STIDs.

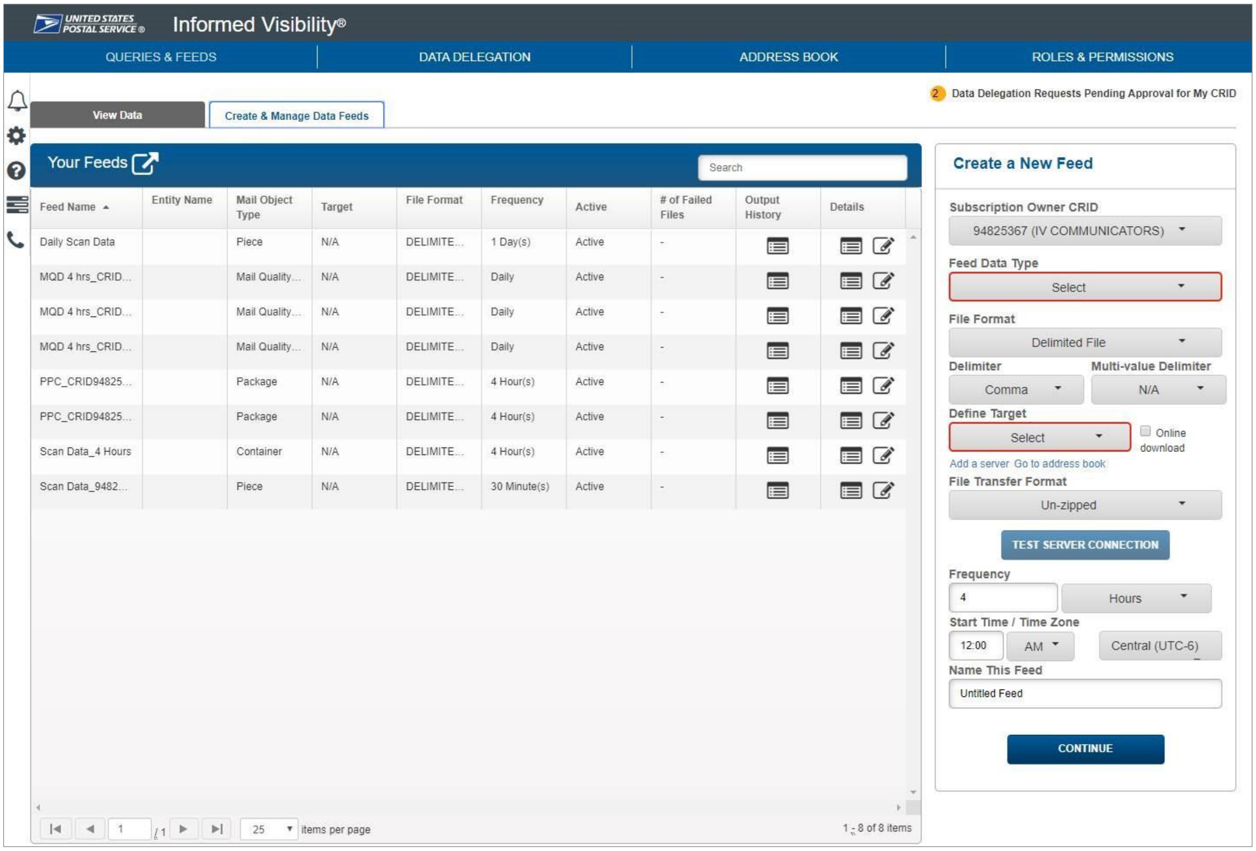
  To receive data for non-Tracing STIDs, you can perform a one-time query. In addition, with approval and assistance from the IV Solutions Center, you can create a data feed for routing codes with **all** STIDs (Tracing and non-Tracing). Contact the IV Solutions Center for additional information.

Within the application, you can create and manage data feeds (subscriptions) to receive data on a recurring basis. For a data feed, you define the CRID(s), MID(s), routing code(s), or Service Type ID(s) (STID(s)) for which you want data, select a delivery location, define filters and the data fields to receive, and select a frequency to receive the data. The application creates files with the information selected and delivers them at the selected frequency.

Subscriptions "belong to" a CRID and are shared by that CRID's users. When a subscription belongs to a CRID, certain users for that CRID are able to modify or delete the subscription. In the application, you can see subscriptions belonging to CRIDs for which you have the IV-MTR service. However, you **cannot** see subscriptions belonging to other CRIDs, even if those CRIDs have delegated visibility to your CRID. For example:

- If a user only has the IV-MTR service for CRID A, the user can only see subscriptions belonging to CRID A.
- If CRID B delegated visibility to CRID A, CRID A could create a subscription to receive data for CRID B. The subscription would belong to CRID A—not CRID B. The CRID A user **would** see this subscription because it belongs to **CRID A**.
- However, if CRID B created a subscription to receive data, the CRID A user **would not** see this subscription because it belongs to **CRID B**.

You can create a new data feed or view and modify an existing data feed. To access these functions, click **Queries & Feeds** in the top navigation bar. Then, click the **Create & Manage Data Feeds** tab. See the following sections for additional information about data feeds.



8.1 Create New Feed

Important:

- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can create a new data feed.
- When you create a new data feed, it is automatically activated.

The general steps for creating a new data feed are provided below. Detailed instructions for completing each step are available in the following subsections.

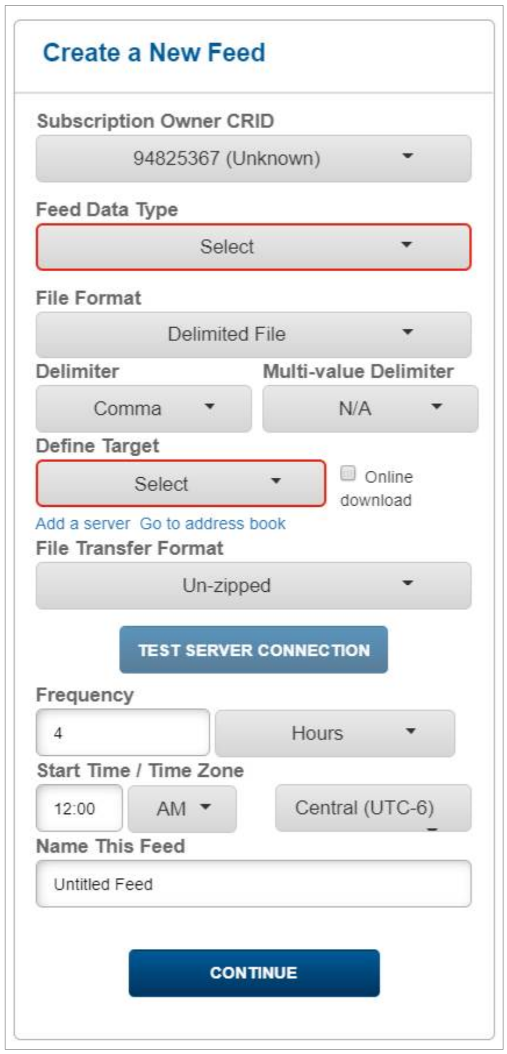
1. In the **Create a New Feed** section on the right side of the page, select the initial feed options. These options may include:
   a. Subscription owner CRID
   b. Feed date type
   c. Data file format
   d. Target location for the data to be sent to
   e. Frequency and start time for the data to be sent
   f. Name of the feed
2. When finished, click **Continue**.
3. On the Select Entity(s) screen, select the CRID(s), MID(s), routing code(s), and STID(s) for which you want data.

4. When finished, click **Next Step**.
5. On the Define Filters & Fields screen, select the mail object type and handling event type(s) to receive, set filters, and select data fields and their display order (if applicable).
6. When finished, click **Create Feed**. The data feed will begin to deliver data based on your selections.

For information about using a saved entity, filter, view, or report to create a data feed, see Section 13: *Saved Reports*.

8.1.1 Select Initial Feed Options

To create a data feed, you must first select initial options in the **Create a New Feed** section on the right side of the tab. For additional information about each option, see the following sections.



When you are finished selecting the initial options, click **Continue** to go to the Select Entity(s) screen.

8.1.1.1 Select Subscription Owner CRID

The **Subscription Owner CRID** drop-down menu populates with those CRIDs for which you have the IV-MTR service *and* the ability to create a new data feed.

Administrative users for the selected CRID will be able to modify or delete the data feed. Your selection here also determines which entities—CRIDs, MIDs, and routing codes—you will be able to select to receive data for through this data feed.

When you have made a selection, continue to select the feed data type.

8.1.1.2 Select Feed Data Type

Under **Feed Data Type**, select the type of data to receive. When you have made a selection, continue to select the file format.

NOTE:

- The information within this guide is applicable for receiving mail tracking and reporting data through the IV-MTR application.
- For information about receiving EPS or PPC data through IV-MTR, see the EPS PostalPro page.
- For information about receiving MQD through IV-MTR, see the MQD through IV-MTR PostalPro page.
- For information about receiving IDPC data through IV-MTR, see the Provisioning IDPC through IV-MTR User Guide.

8.1.1.3 Select File Format and Define Target

Make a selection from the **File Format** drop-down menu. Four file formats are available:

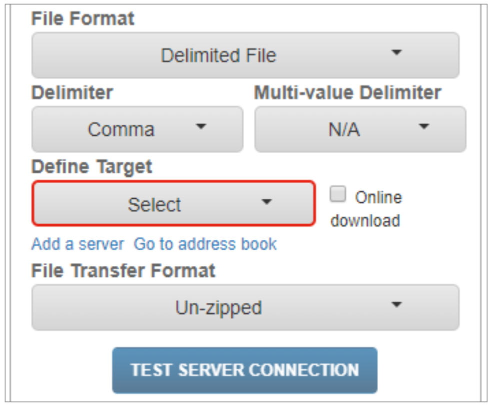
- **Delimited File:** Customizable format in which you select the data fields, order of fields, and delimiter character
- **IMb Tracing Legacy File Format:** Legacy IMb Tracing format with pre-defined data fields
- **JSON:** Lightweight, text-based format in which you select the data fields to receive
- **Mail.XML:** XML format with pre-defined data fields based on the XML Schema Definition (XSD)

For additional information about these file formats, see Section 3.3: *File Formats*.

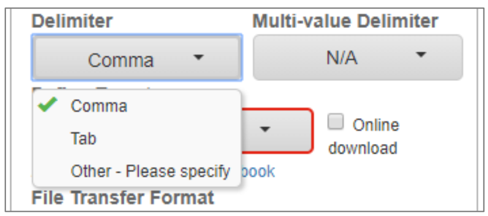
Based on your selection, additional drop-down menus appear for you to specify how to receive data from the feed. The following sections provide additional information about each drop-down menu.

8.1.1.3.1 Delimited File

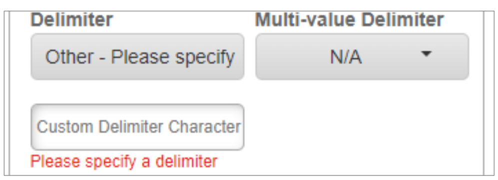
If you select this format, the **Delimiter**, **Define Target**, and **File Transfer Format** sections are available for additional customization.



1. Under **Delimiter** and **Multi-value Delimiter**, select the delimiter character(s) you would like for the file.
   - The options are comma, tab, or other.

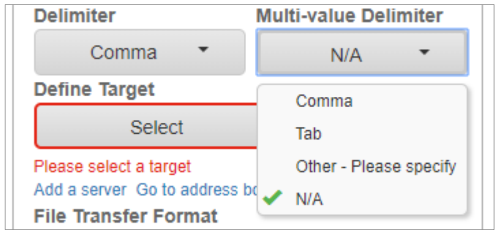


   - If you select **Other**, a field appears for you to specify the character you would like to use.



- A multi-value delimiter is required for some data fields. The default is “N/A”. If you do not select a multi-value delimiter here but later select a data field requiring the multi-value delimiter, the application prompts you to select one at that time.

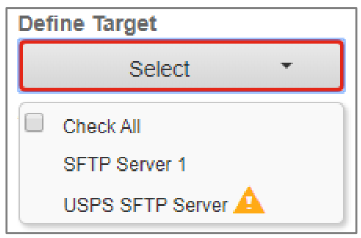
  Note: You cannot select the same delimiter for both **Delimiter** and **Multi-value Delimiter**.



2. Under **Define Target**, select the target location(s) of where to send the data feed files. For the delimited file format, you may select an SFTP server or Online Download.

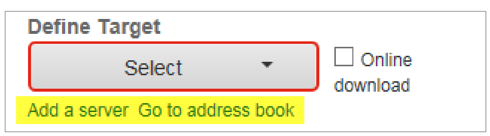
   - To use an SFTP server that is already in your address book, select the server from the **Define Target** drop-down menu.

     Note: You may select multiple servers.



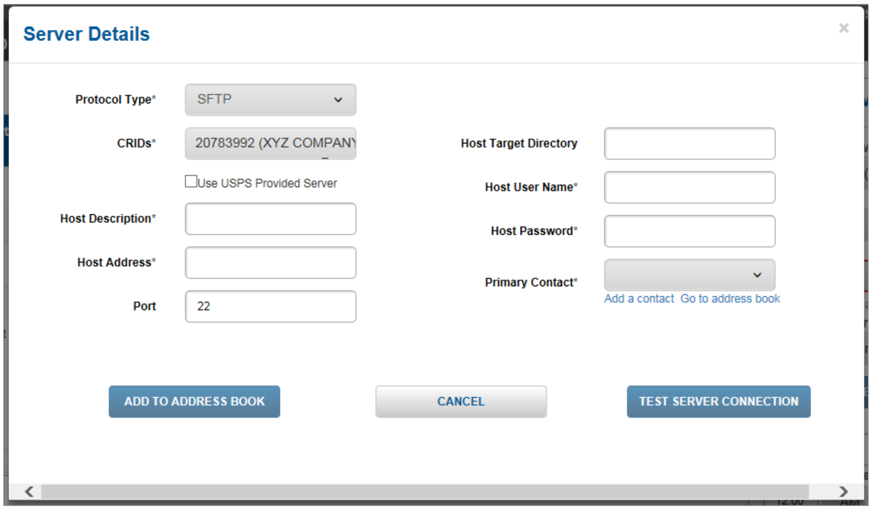
   - To use an SFTP server that is **not** yet in your address book, click **Add a server** to open a window where you can add the server without leaving the page OR click **Go to address book** to leave the page to manage your address book.

     Note: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.



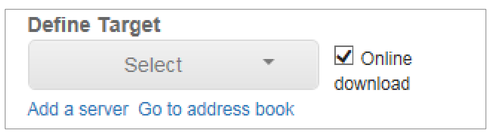
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server or web service is added to your address book and is now available from the **Define Target** drop-down menu.

Note: For additional information about adding a server, see Section 10.1.2: *Add New Server*.

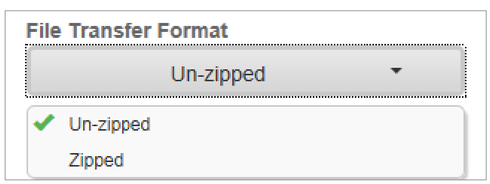


- To use Online Download, check the **Online download** box. The **Define Target** drop-down menu becomes grayed out because you cannot also select a server or web service.

  Note: You will retrieve Online Download files from the data feed's output history. For additional information, see Section 8.2.1: *Output History*.

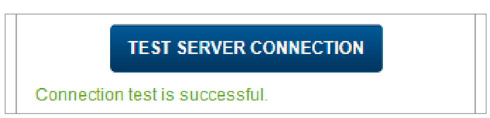


3. Under **File Transfer Format**, select whether to receive an un-zipped or zipped file. **Note:** If you selected Online Download, your files will be zipped when downloaded from the data feed Output History, regardless of your selection from this menu.

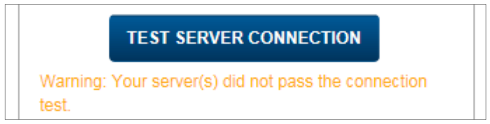


If you would like to test the application's connection to the selected server(s), click **Test Server Connection**.

- If the test is successful, a message displays confirming the test was successful.



- If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV Solutions Center for additional assistance.

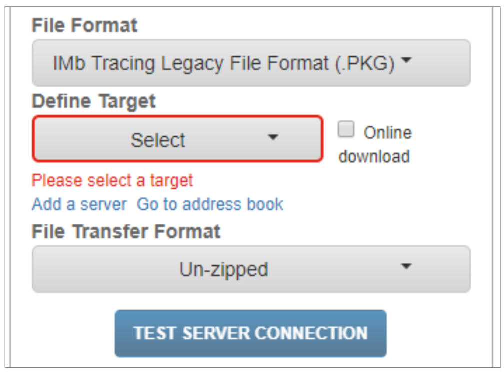


When you have finished selecting options for this file format, continue to *Select Frequency and Start Time*.

8.1.1.3.2 IMb Tracing Legacy File Format

Important: Only piece data is available in this file format.

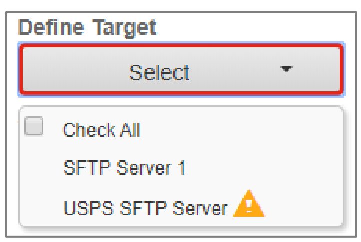
If you select this format, the **Define Target** and **File Transfer Format** sections are available for additional customization.



1. Under **Define Target**, select the target location(s) of where to send the data feed files. For the IMb Tracing legacy file format, you may select an SFTP server or Online Download.

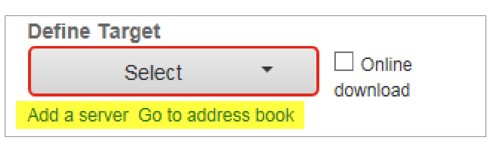
   - To use an SFTP server that is already in your address book, select the server from the **Define Target** drop-down menu.

     Note: You may select multiple servers.



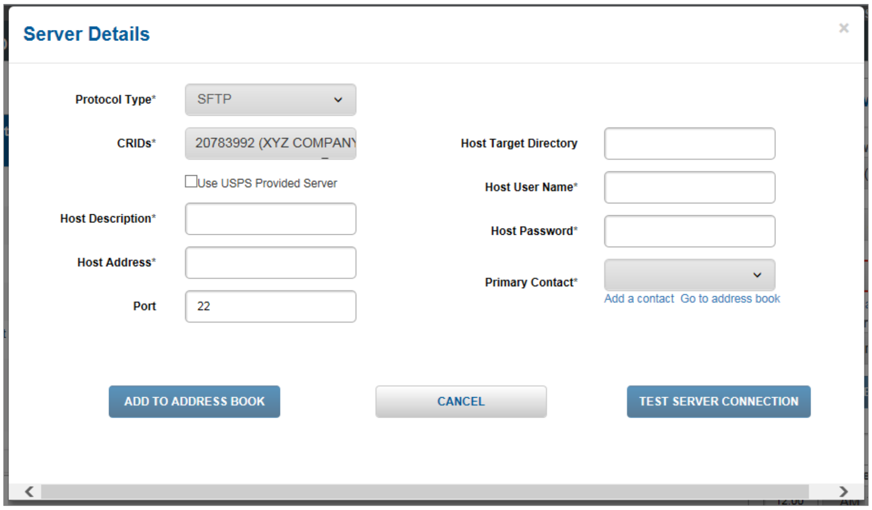
   - To use an SFTP server that is **not** yet in your address book, click **Add a server** to open a window where you can add the server without leaving the page OR click **Go to address book** to leave the page to manage your address book.

     Note: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.



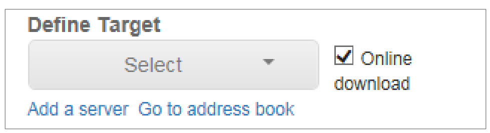
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server or web service is added to your address book and is now available from the **Define Target** drop-down menu.

Note: For additional information about adding a server, see Section 10.1.2: *Add New Server*.

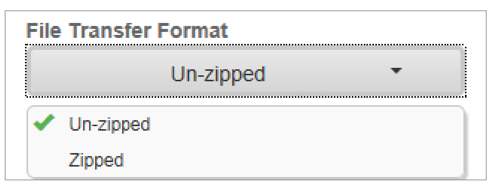


- To use Online Download, check the **Online download** box. The **Define Target** drop-down menu becomes grayed out because you cannot also select a server or web service.

  Note: You will retrieve Online Download files from the data feed's output history. For additional information, see Section 8.2.1: *Output History*.

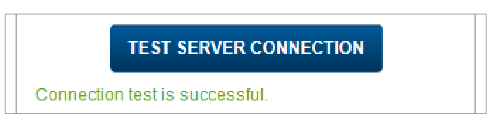


2. Under **File Transfer Format**, select whether to receive an un-zipped or zipped file. **Note:** If you selected Online Download, your files will be zipped when downloaded from the data feed Output History, regardless of your selection from this menu.

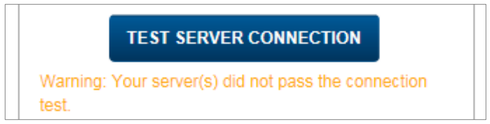


If you would like to test the application's connection to the selected server(s), click **Test Server Connection**.

- If the test is successful, a message displays confirming the test was successful.



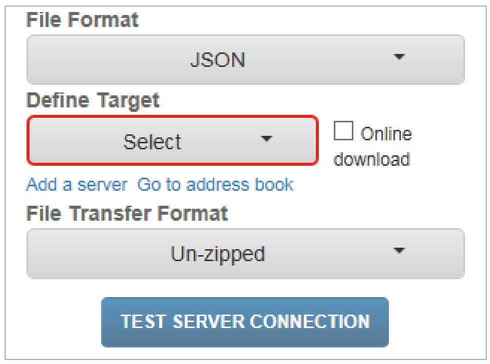
- If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV Solutions Center for additional assistance.



When you have finished selecting options for this file format, continue to *Select Frequency and Start Time*.

8.1.1.3.3 JSON

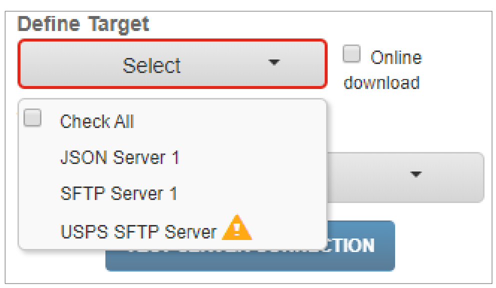
If you select this format, the **Define Target** and **File Transfer Format** sections are available for additional customization.



1. Under **Define Target**, select the target location(s) of where to send the data feed files. For the JSON file format, you may select an SFTP server, a JSON web service, or Online Download.

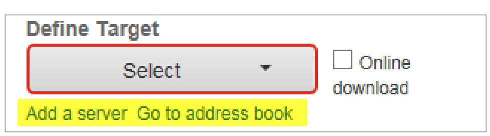
   - To use an SFTP server or JSON web service that is already in your address book, select the server or web service from the **Define Target** drop-down menu.

     Note: You may select multiple SFTP servers, JSON web services, or a combination of both.



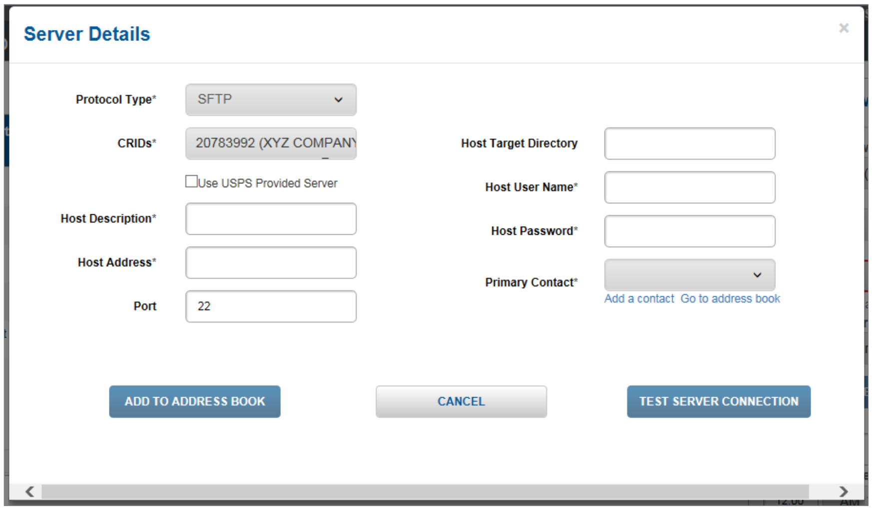
   - To use an SFTP server or JSON web service that is **not** yet in your address book, click **Add a server** to open a window where you can add the server or web service without leaving the page OR click **Go to address book** to leave the page to manage your address book.

     Note: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.



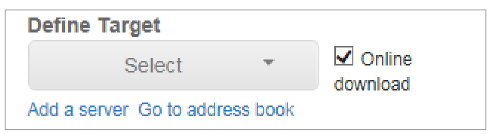
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server or web service is added to your address book and is now available from the **Define Target** drop-down menu.

Note: For additional information about adding a server or web service, see Section 10.1.2: *Add New Server*.

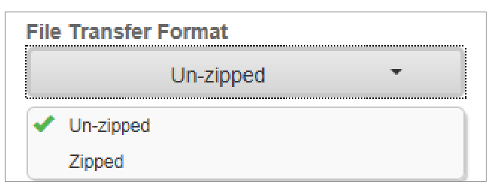


- To use Online Download, check the **Online download** box. The **Define Target** drop-down menu becomes grayed out because you cannot also select a server or web service.

  Note: You will retrieve Online Download files from the data feed's output history. For additional information, see Section 8.2.1: *Output History*.

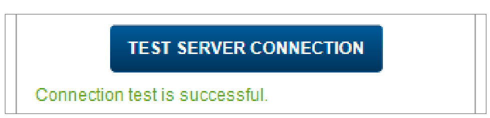


2. Under **File Transfer Format**, select whether to receive an un-zipped or zipped file. **Note:** If you selected Online Download, your files will be zipped when downloaded from the data feed Output History, regardless of your selection from this menu.

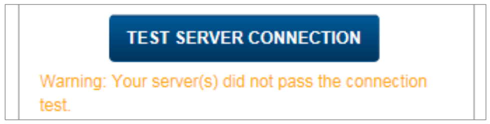


If you would like to test the application's connection to the selected server(s) and/or web service(s), click **Test Server Connection**.

- If the test is successful, a message displays confirming the test was successful.



- If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server(s) and/or web service(s) or contact the IV Solutions Center for additional assistance.

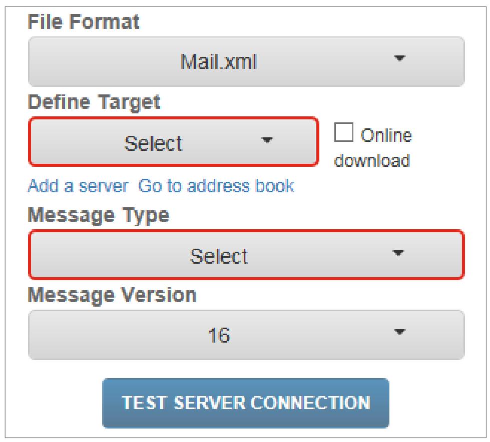


When you have finished selecting options for this file format, continue to *Select Frequency and Start Time*.

8.1.1.3.4 Mail.XML

Important: Only container and handling unit data is available in this file format.

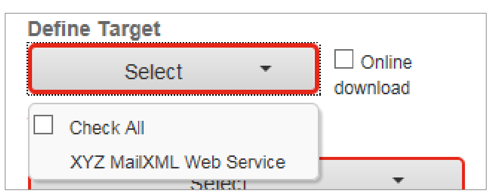
If you select this format, the **Define Target**, **Message Type**, and **Message Version** sections are available for additional customization.



1. Under **Define Target**, select the target location(s) of where to send the data feed files. For the Mail.XML file format, you may select a Mail.XML web service or Online Download.

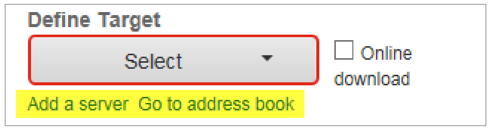
   - To use a web service that is already in your address book, select the web service from the **Define Target** drop-down menu.

     Note: You may select multiple web services.



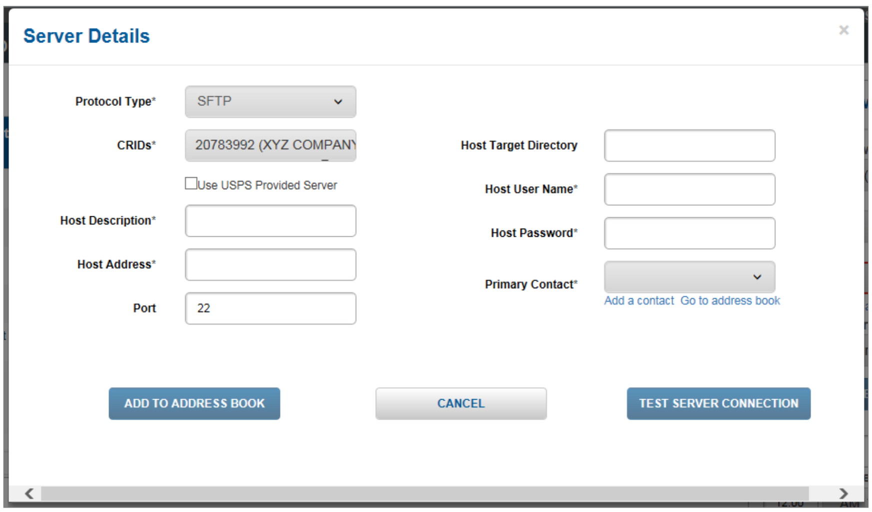
- To use a web service that is not yet in your address book, click **Add a server** to open a window where you can add the web service without leaving the page OR click **Go to address book** to leave the page to manage your address book.

  Note: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.

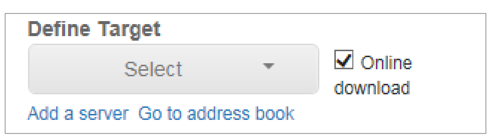
  If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The web service is added to your address book and is now available from the **Define Target** drop-down menu.

  Note: For additional information about adding a web service, see Section 10.1.2: *Add New Server*.

- To use Online Download, check the **Online download** box. The **Define Target** drop-down menu becomes grayed out because you cannot also select a server or web service.

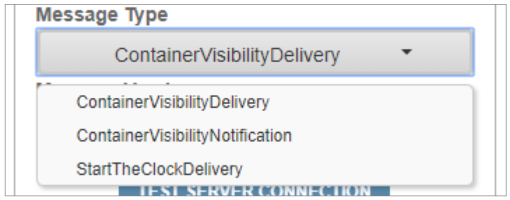
  Note: You will retrieve Online Download files from the data feed's output history. For additional information, see Section 8.2.1: *Output History*.

Second, under **Message Type**, select the Mail.XML message to receive. Currently, the following messages are available:

- *ContainerVisibilityDelivery*: The application sends detailed handling event data for containers or handling units matching the subscription.
- *ContainerVisibilityNotification*: The application sends notification of available handling event data for containers or handling units.

- *StartTheClockDelivery*: The application sends detailed Start-the-Clock data for containers or handling units matching the subscription.
- *StartTheClockNotification*: The application sends notification of available Start-the-Clock data for containers or handling units.

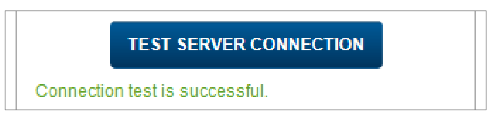


Third, under **Message Version**, select the Mail.XML version that the application should send the message in.

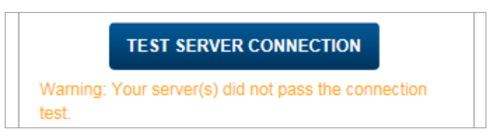
Note: IV-MTR currently supports Mail.XML versions 12.0A, 12.0B, 14.0A, and 16.0 for all messages. For Start-the-Clock messages, IV-MTR supports these versions as well as version 21.0.

If you would like to test the application's connection to the selected web service(s), click **Test Server Connection**.

- If the test is successful, a message displays confirming the test was successful.



- If the test is not successful, a warning message appears. Go to your address book to modify the settings for the web service or contact the IV Solutions Center for additional assistance.



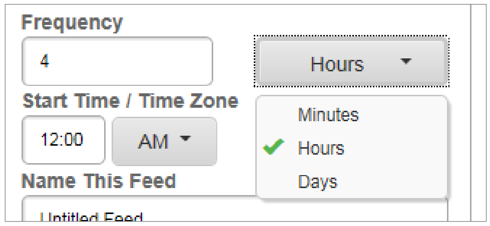
When you have finished selecting options for this file format, continue to *Select Frequency and Start Time*.

8.1.1.4 Select Frequency and Start Time

The **Frequency** allows you to indicate how often you want to receive data from this feed. The default is every 4 hours, but you may select to receive data as often as every minute up to 31 days. To change the frequency, follow these steps:

1. Enter the desired time value in the field on the left in the **Frequency** section.

2. Then, select the unit of time (e.g., Minutes, Hours, Days) from the drop-down menu on the right.



The **Start Time / Time Zone** allows you to indicate when a data feed should deliver data. Once activated, a data feed begins sending data at the next occurrence of the selected start time, in the selected time zone. After the initial send, the data feed sends data according to the selected frequency.

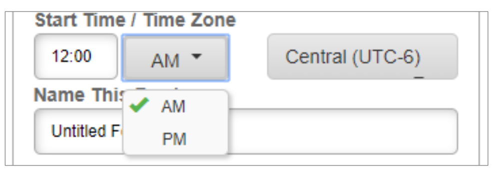
For example, there is a data feed with a frequency of 12 hours and a start time of 8:00 AM Eastern. Once activated, this feed would deliver data at the next occurrence of 8:00 AM Eastern and would then deliver data every 12 hours thereafter.

The default is 12:00 AM in the Central (UTC-6) time zone, but you may select any time. The available time zones are as follows:

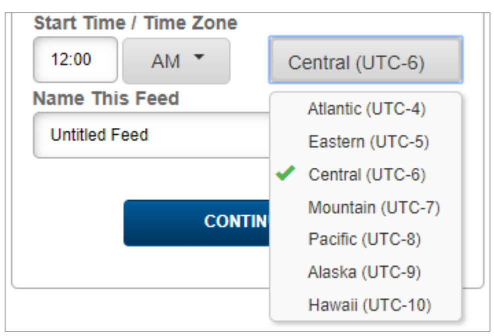
Atlantic (UTC-4)	Pacific (UTC-8)
Eastern (UTC-5)	Alaska (UTC-9)
Central (UTC-6)	Hawaii (UTC-10)
Mountain (UTC-7)	

To change the start time or time zone, follow these steps:

- To change the start time, enter the desired time value in the field on the left in the **Start Time / Time Zone** section. Then, select AM or PM from the drop-down menu to the right of the field.



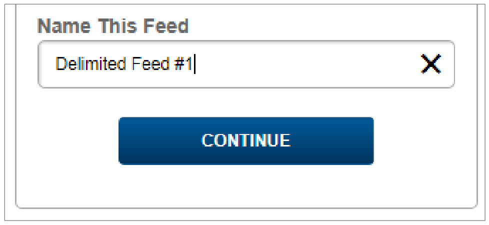
- To change the time zone, select the time zone from the drop-down menu on the right in the **Start Time / Time Zone** section.



When you have selected the frequency and start time, continue to *Name the Feed*.

8.1.1.5 Name the Feed

Enter a name for the new data feed in the **Name This Feed** field. When you are finished, click **Continue** to go to the Select Entity(s) screen.

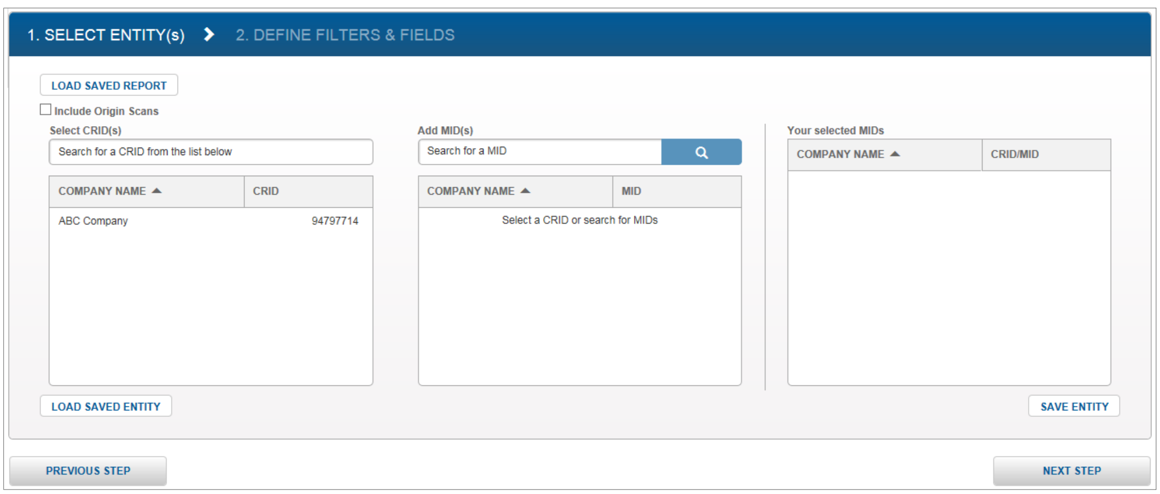


8.1.2 Select Entity(s)

On this screen, select the CRID(s), MID(s), routing code(s), or STID(s) for which you want data. You may do this in multiple ways. The following sections provide instructions for each option:

- **Option 1:** Select CRID(s), select MID(s) belonging to the CRID(s), and then add STID(s) (STID not required)
- **Option 2:** Search for and add MID(s) directly and then add STID(s) (STID not required)
- **Option 3:** Add routing code(s) and then add STID(s) (STID not required)

  Note: You may choose option 3 instead of or in addition to option 1 or 2. Option 3 is not available if you selected Mail.XML as the file format on the previous screen.



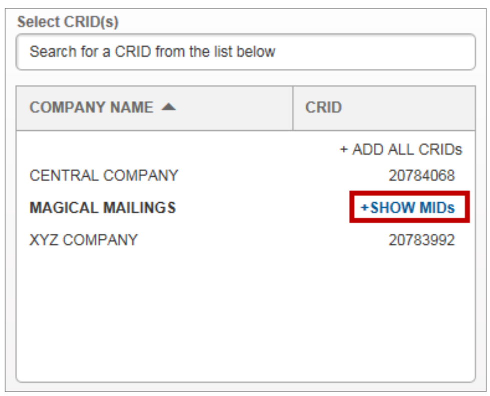
Note: For information about using a saved entity to create a data feed, see Section 13.1: *Saved Entity*.

8.1.2.1 Option 1: Select CRID(s), then MID(s)

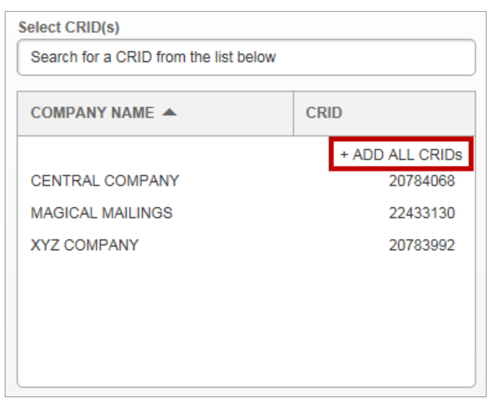
By default, the **Select CRID(s)** section displays the Subscription Owner CRID (selected on the previous screen) and any CRIDs delegated to that CRID. CRIDs whose MIDs are delegated to the Subscription Owner CRID also appear.

To filter this list for a specific CRID, begin typing the CRID name or number in the search box. As you type, the list displays the CRID names or numbers matching the entered text.

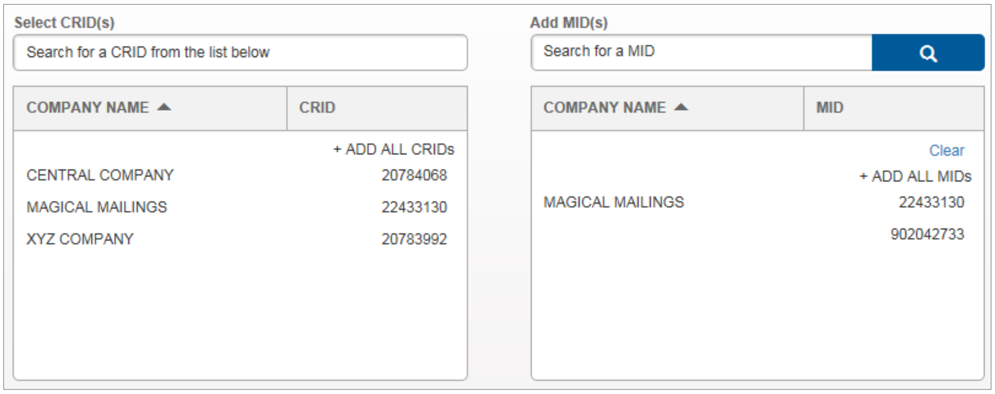
To select a *single* CRID, hover on the CRID number and click **Show MIDs**.



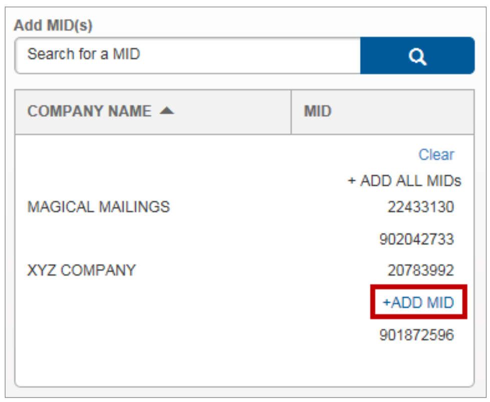
To select *all* CRIDs, click **Add All CRIDs**.



The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.

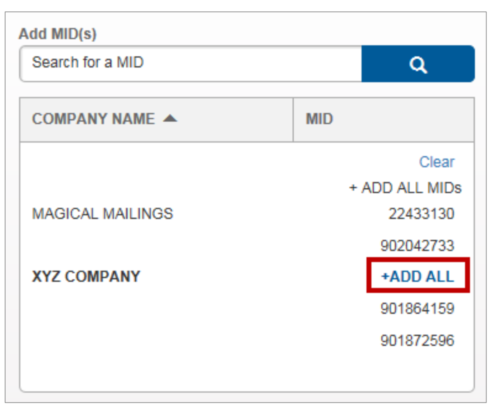


From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.



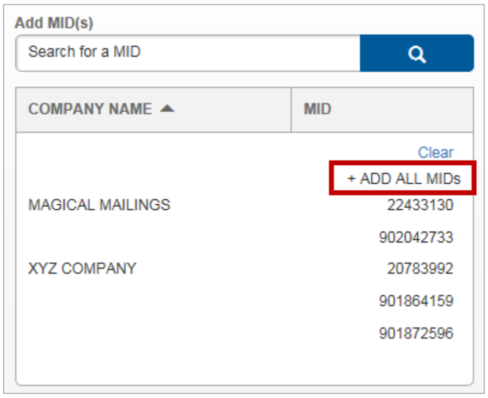
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level subscription, while selecting **Add All** creates a CRID-level subscription. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs** at the top of the list.

Important: This creates a CRID-level subscription for each CRID. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.



After clicking **Add MID**, **Add All**, or **Add All MIDs**, a window appears. To limit data by STID(s), enter STIDs separated by a comma. Then, click **Add Selected STID(s)**.

Note: If you do not want to limit data by STID(s), click **Add All STID(s)**.

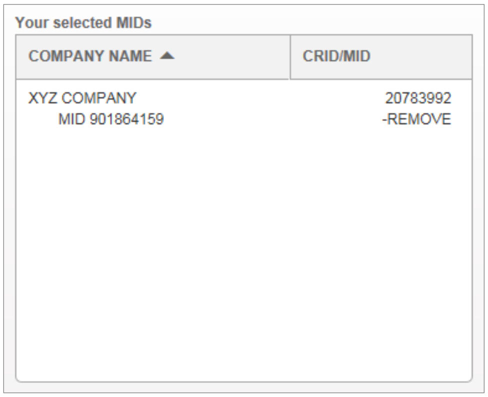
Important: In general, only data for Tracing STIDs is available through a data feed. For the list of Tracing and non-Tracing STIDs, see the STID Table on PostalPro. In the table, the columns labeled "with IV MTR" are the Tracing STIDs.

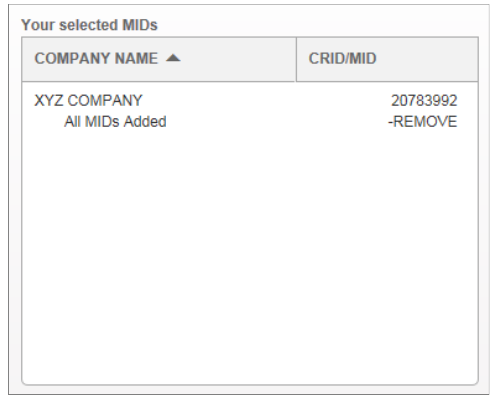
To receive data for non-Tracing STIDs, you can perform a one-time query. In addition, with approval and assistance from the IV Solutions Center, you can create a data feed for routing codes with **all** STIDs (Tracing and non-Tracing). Contact the IV Solutions Center for additional information.

The selected MID or MIDs appears in the **Your selected MIDs** section.

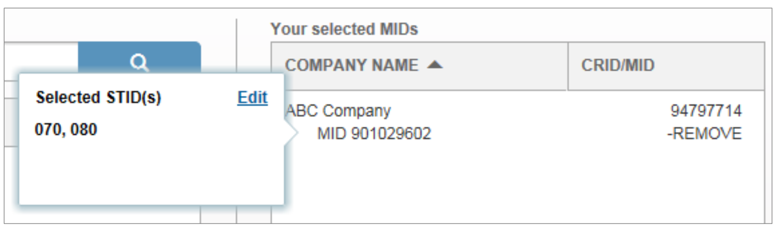
Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





To see the STID(s) added, hover on a MID number in the **Your selected MIDs** section.



Repeat the steps above to add additional CRIDs, MIDs, or STIDs as desired.

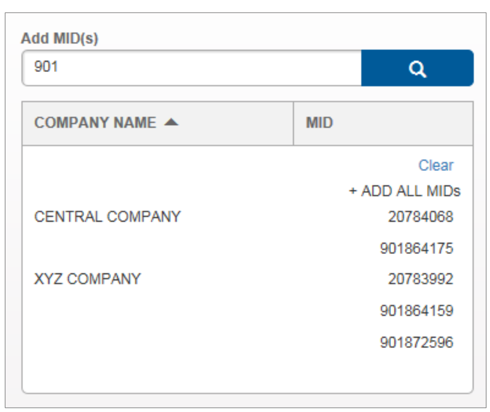
To add a routing code, go to Section 8.1.2.3: *Option 3: Add Routing Code(s)*. If you are finished, click **Next Step**.

8.1.2.2 Option 2: Directly Add MID(s)

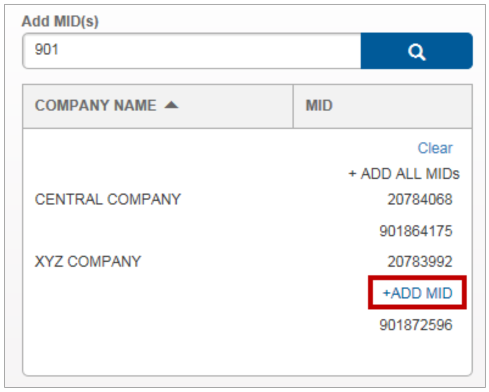
By default, the **Add MID(s)** section does not display all of the MIDs for which you have visibility. You must search for them.

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs for which you have the IV-MTR service or have been delegated visibility **and** for which you have the ability to create a data feed appear based on the search criteria.

Note: The CRID number appears above the MID number(s), to the right of the company name.

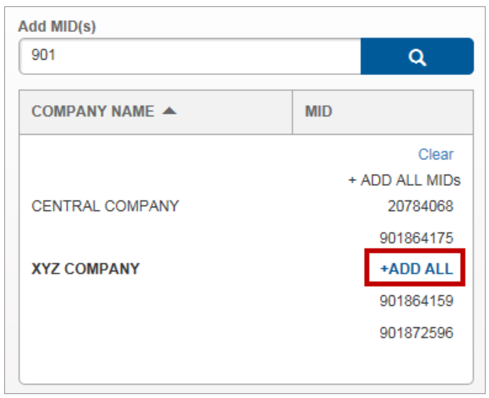


To add a *single* MID, hover on the MID number and click **Add MID**.



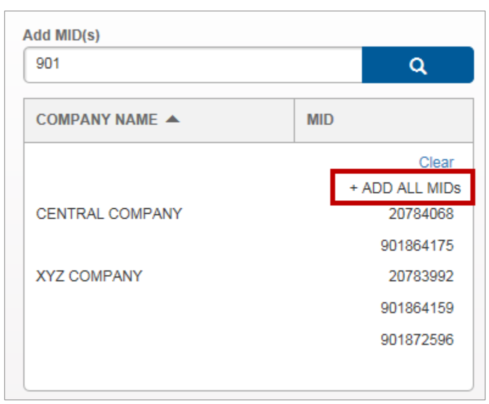
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level subscription, while selecting **Add All** creates a CRID-level subscription. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs** at the top of the list.

Important: This creates a CRID-level subscription for each CRID. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.



After clicking **Add MID**, **Add All**, or **Add All MIDs**, a window appears. To limit data by STID(s), enter STIDs separated by a comma. Then, click **Add Selected STID(s)**.

Note: If you do not want to limit data by STID(s), click **Add All STID(s)**.

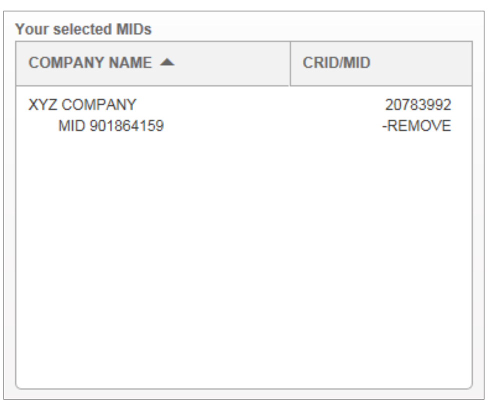
Important: In general, only data for Tracing STIDs is available through a data feed. For the list of Tracing and non-Tracing STIDs, see the STID Table on PostalPro. In the table, the columns labeled "with IV MTR" are the Tracing STIDs.

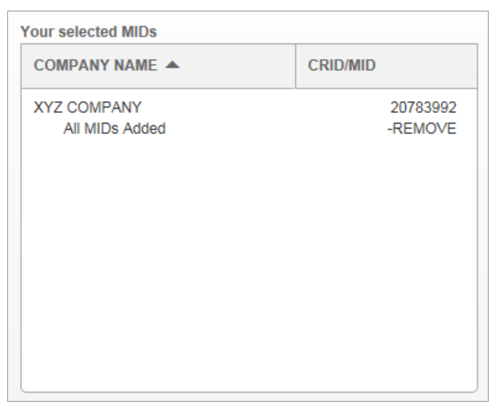
To receive data for non-Tracing STIDs, you can perform a one-time query. In addition, with approval and assistance from the IV Solutions Center, you can create a data feed for routing codes with **all** STIDs (Tracing and non-Tracing). Contact the IV Solutions Center for additional information.

The selected MID or MIDs appear in the **Your selected MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





To see the STID(s) added, hover on a MID number in the **Your selected MIDs** section.

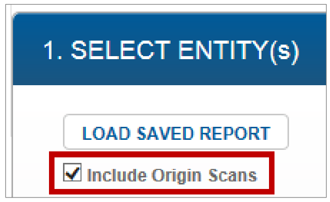
Repeat the steps above to add additional MIDs or STIDs as desired.

To add a routing code, go to Section 8.1.2.3: *Option 3: Add Routing Code(s)*. If you are finished, click **Next Step**.

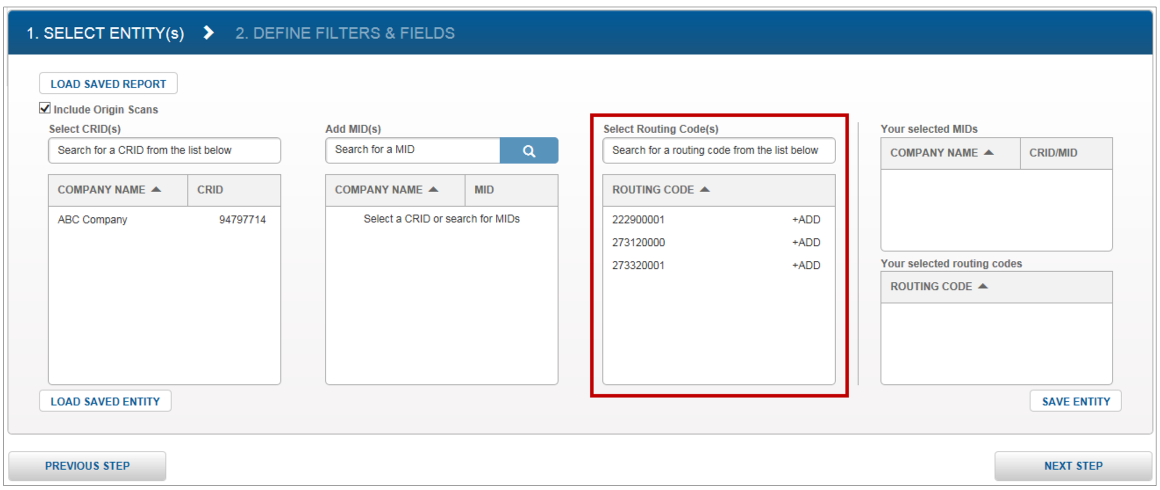
8.1.2.3 Option 3: Add Routing Code(s)

Note: You cannot add a routing code if you selected Mail.XML as the file format on the previous screen.

You may add a routing code instead of or in addition to adding CRIDs or MIDs. To enable the ability to add a routing code, select **Include Origin Scans** in the upper-left area of this screen.

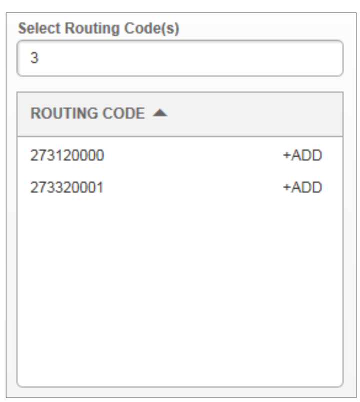


The **Select Routing Code(s)** section appears to the right of **Add MID(s)**.

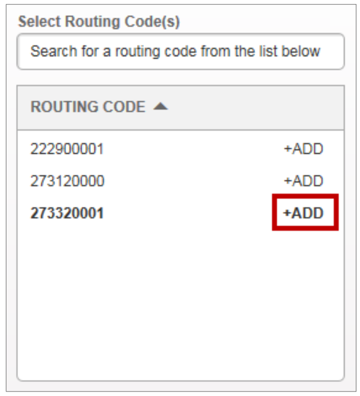


By default, the **Select Routing Code(s)** section displays the routing codes mapped to the Subscription Owner CRID (selected on the previous screen) or its MIDs.

To filter this list for a specific routing code, begin typing the number in the search box. As you type, the list displays the routing codes matching the entered text.



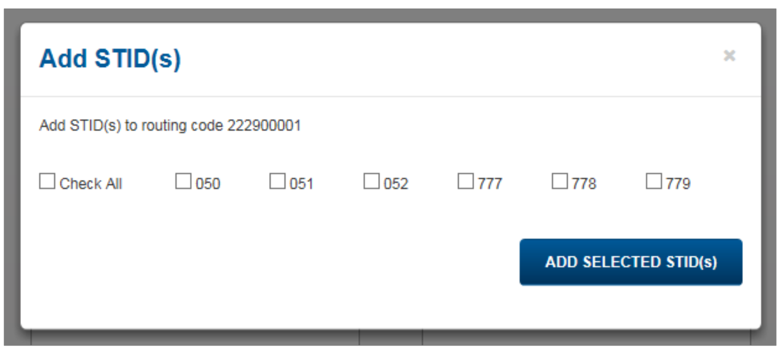
To select a routing code, hover on the number and click **Add**.



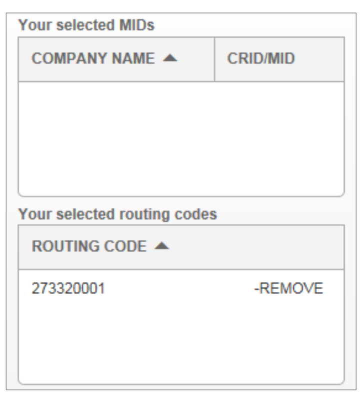
After clicking **Add**, a window appears. Check the box for the STID(s) to be added to the selected routing code. To select all STIDs, select **Check All**. Then, click **Add Selected STID(s)**.

Important: In general, only data for Tracing STIDs is available through a data feed. For the list of Tracing and non-Tracing STIDs, see the STID Table on PostalPro. In the table, the columns labeled "with IV MTR" are the Tracing STIDs.

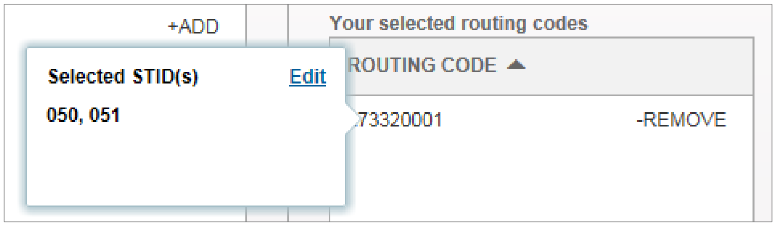
To receive data for non-Tracing STIDs, you can perform a one-time query. In addition, with approval and assistance from the IV Solutions Center, you can create a data feed for routing codes with **all** STIDs (Tracing and non-Tracing). Contact the IV Solutions Center for additional information.



The selected routing code appears in the **Your selected routing codes** section.



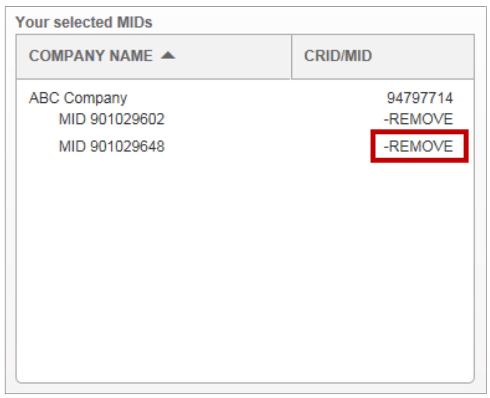
To see the STIDs added, hover on a routing code in the **Your selected routing codes** section.



Repeat the steps above to add additional routing codes as desired. When you are finished, click **Next Step**.

8.1.2.4 Remove Selected Entity(s)

To remove a selected CRID, MID, or routing code, go to the **Your selected MIDs** or **Your selected routing codes** section. Click **Remove** to the right of the entity you wish to remove.



8.1.2.5 Modify or Remove STID(s)

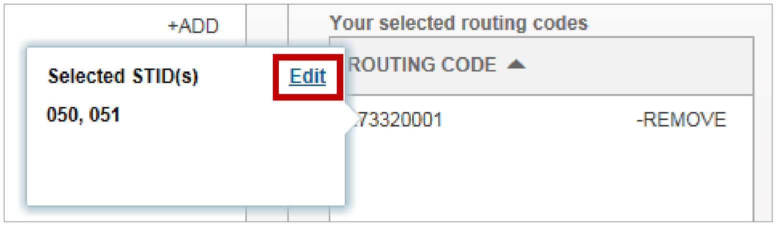
To modify or remove a STID added to a CRID or MID:

1. Go to the **Your selected MIDs** section.
2. Hover on the MID, and click **Edit** in the **Selected STID(s)** window.

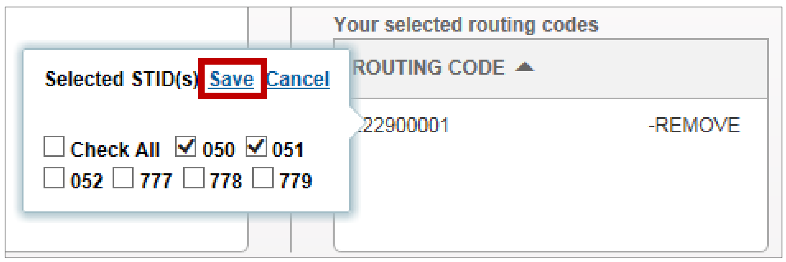
3. Modify the STID(s) as necessary. (**Note:** Separate STIDs with a comma.)
4. Click **Save**.

To modify or remove a STID added to a selected routing code:

1. Go to the **Your selected routing codes** section.
2. Hover on the routing code, and click **Edit** in the **Selected STID(s)** window.



3. To add a STID, check the appropriate box. To remove a STID, uncheck the box.
4. Click **Save**.



8.1.3 Define Filters & Fields

The Define Filters & Fields screen has additional options for you to customize the data feed. The options vary depending on the file format selected. The following table describes the functions of each area of the screen.

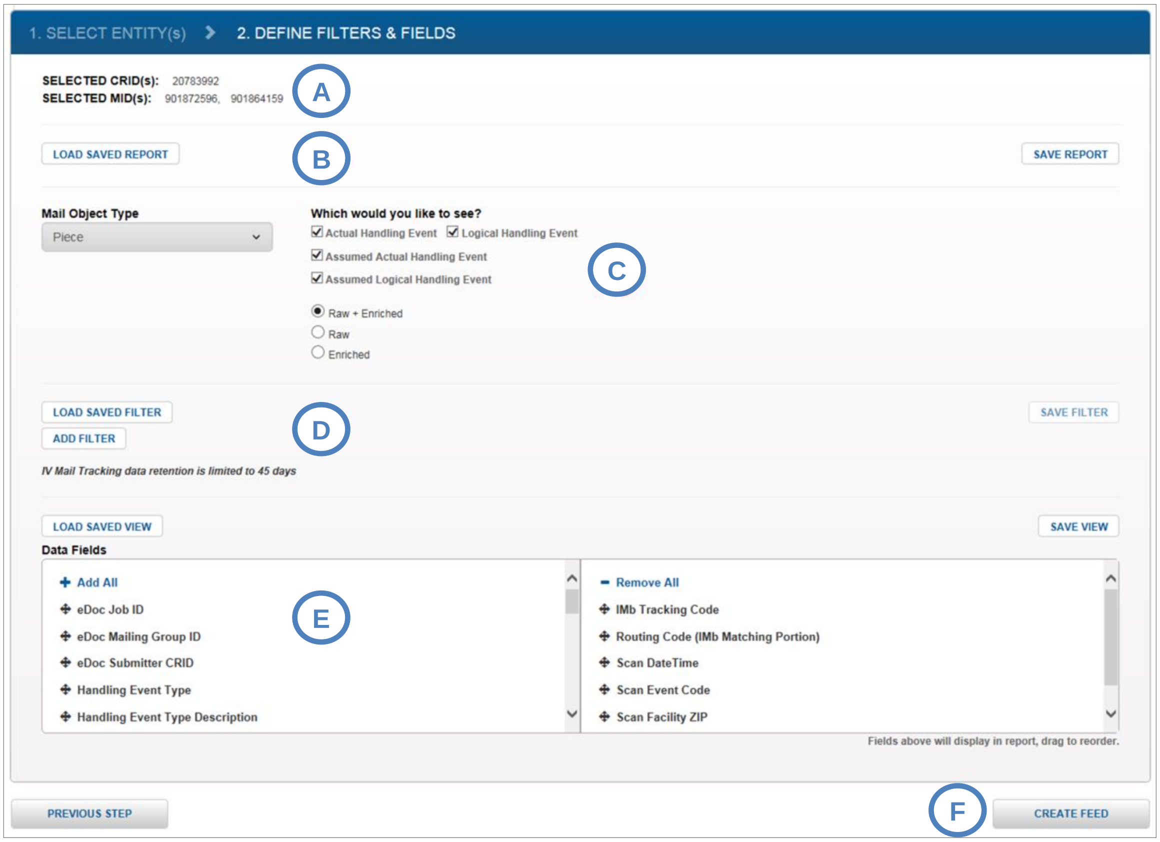


Table 8.1: Data Feed Define Filters & Fields Screen Functions

Screen Area	Description
A	View the CRID(s), MID(s), and routing code(s) selected for the query
B	Load a saved report or create one
C	Select the mail object type and handling event type(s) for which to receive data **Note:** The available mail object types vary depending on the file format selected.
D	Add filters to refine the data feed results (optional)
E	Select the data fields to receive and arrange them in the desired order **Note:** This function varies depending on the file format selected.
F	Click **Create Feed** to confirm your selections and create the data feed

For additional information about the options on this screen, see the following sections. For information about using a saved filter, view, or report to create a data feed, see Section 12: *Notifications*.

8.1.3.1 View Selected Entity(s)

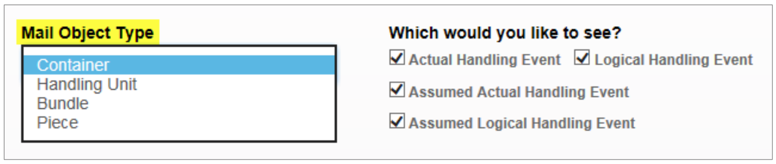
This area displays the CRID(s), MID(s), and routing code(s) you selected for the data feed.

8.1.3.2 Select Mail Object and Handling Event Type(s)

> **Important:** At this time, you may only select one mail object type for a data feed. You must create a separate data feed if you want data for an additional mail object type.

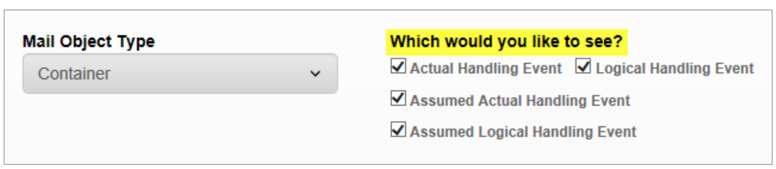
In this area, select the mail object type and handling event type(s) for which you would like to receive data.

To select the mail object type, make a selection from the **Mail Object Type** drop-down menu.



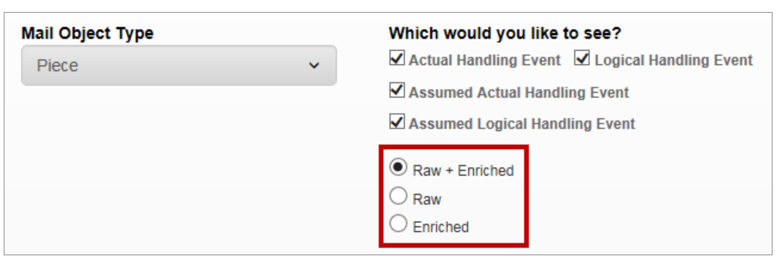
> **Important:**
> - If you selected the legacy package file format, data is only available for pieces.
> - If you selected the Mail.XML file format, data is only available for handling units and containers.
> - If you selected a routing code, data is only available for pieces and bundles.

To select the handling event type(s), check the box for the desired handling event type(s) under **Which would you like to see?**. You may select more than one handling event type.



> **Important:** Logical, assumed actual, and assumed logical handling events may not be available for all mail object types.

If you selected the delimited or JSON file format to receive data for pieces, you may also select whether to receive raw and enriched data, only raw data, or only enriched data. Click the selected option.



8.1.3.3 Add Filter(s)

In this area, you may add filters to limit the data included in the subscription. To add a filter:

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.

   Note: The fields available depend on the mail object type selected.

3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.

   Note:

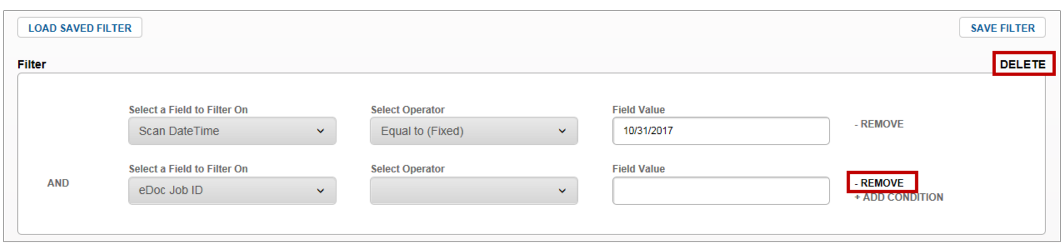
   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.
   - The **Between** operator is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.

4. In the **Field Value** field, enter the filter criteria value.

   Note: The *One of* and *Not One of* operators allow multiple field values. Separate values by commas without a space (e.g., 123456,123457,123458).

To add an additional filter, click **Add Condition**. A second filter section appears. Follow steps 2-4 above to select the filter options.

To remove all filters, click **Delete** in the upper-right corner of the filter section. To remove one filter, click **Remove** to the right of the filter you wish to remove.



For information about using a saved filter, see Section 13.2: *Saved Filter*.

8.1.3.4 Select and Arrange Data Fields

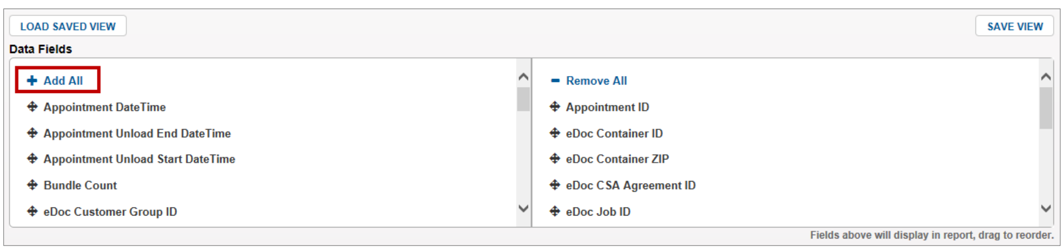
Important:

- For the delimited format, you can select the data fields to receive and arrange the order in which they will appear.
- For the legacy package file format, you can view the data fields that are included, but you cannot add/remove fields or rearrange the order in which they will appear.
- For the Mail.XML file format, you do **not** have the ability to select or arrange the data fields to receive.
- For the JSON file format, although you can rearrange the order of data fields here, this will not affect the order of the data fields in the resulting file.

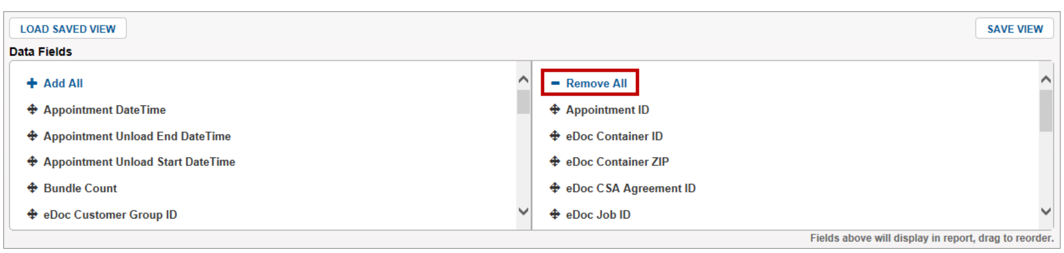
Note: For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.

In this area, select the data fields you would like to receive in the data feed. The available data fields vary based on the selected mail object type.

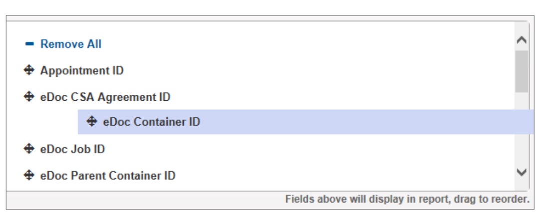
To add a data field, find the desired field on the left side of this section. Drag the field to the right side OR double-click the field name on the left side to add it to the bottom of the list on the right side. To add all available data fields, click **Add All** at the top of the list.



To remove a data field, drag it from the right side to the left side OR double-click the field name on the right side. To remove all of the data fields, click **Remove All** at the top of the list.



On the right side of this area, drag and drop the data fields into the order you would like them to appear in the data feed results.

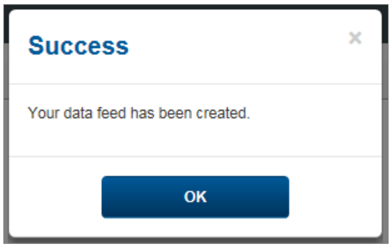


For information about using a saved view, see Section 13.3: *Saved View*.

8.1.3.5 Finish

When you are finished on this screen, click **Create Feed** to create the data feed. A window appears informing you that the data feed was created. The data feed is activated and will begin to deliver data based on your selections.

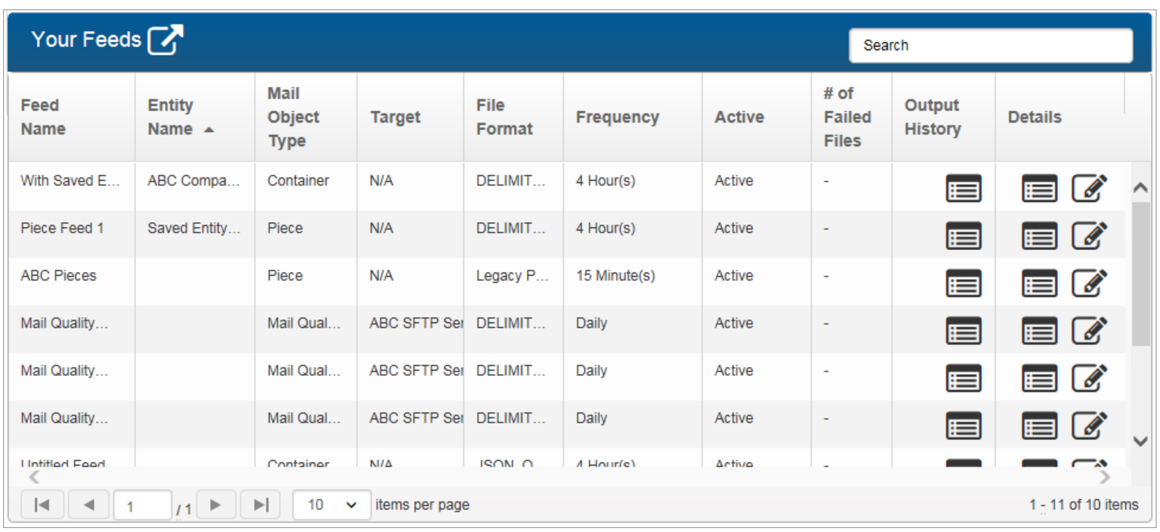
To close the window, click **OK** OR click the **X** icon.



8.2 View or Modify Existing Feed

The **Your Feeds** table on the left side of the **Create & Manage Data Feeds** tab lists your existing data feeds. The list provides the following information:

- **Feed Name:** Name of the data feed
- **Entity Name:** Name of the saved entity, if any, associated to the data feed
- **Mail Object Type:** Mail object type for which the feed is receiving data
- **Target:** Host Description of the SFTP server(s), Mail.XML web service(s), or JSON web service(s) the application is sending data feed files to (**Note:** For Online Download, “n/a” is displayed.)
- **File Format:** Format of the data feed files
- **Frequency:** How often data is provided for this feed
- **Active:** Indication of whether the feed is active or inactive
- **# of Failed Files:** Number of files that have failed to send to the target location (**Note:** The count only includes those files that failed after three retries. The count does not include any files that failed initially but were successful upon resend.)
- **Output History:** Click the details icon to view the files sent for this feed.
- **Details:** Click the details icon to see more details about the feed. Click the modify icon to modify the feed settings. (**Note:** Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can modify a data feed.)



In this section:

- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- To export your feeds list, click the export icon. A pop-up window appears. Select **CSV**, **XLSX**, or **XLS**, and then click **Export**.

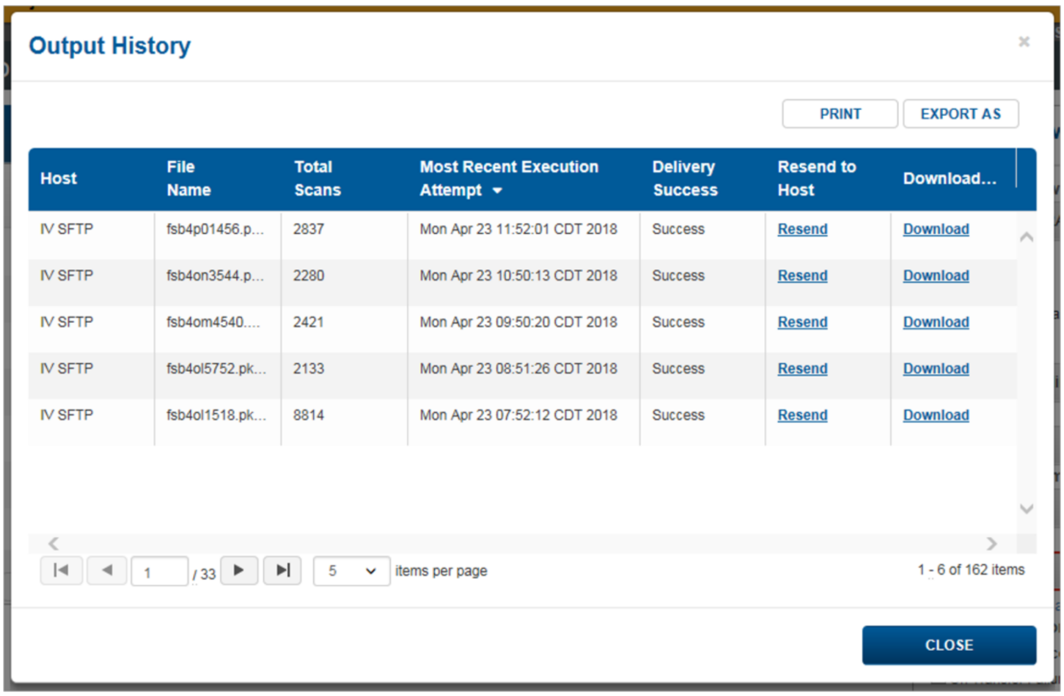
See the following sections for additional information about the functions available in this area.

8.2.1 Output History

To view the files created for a particular data feed, click the details icon in the **Output History** column for that data feed. The Output History window opens and displays the files sent for that data feed.

The list provides the following information:

- **Host:** Host Description for the selected target location(s)
- **File Name:** Name of the file
- **Total Scans:** Total number of scan events included in the file
- **Most Recent Execution Attempt:** Most recent date/time a file was sent for the data feed
- **Delivery Success:** Indication of whether the file was delivered successfully or not



In the Output History window:

- By default, the application sorts files by their creation date and time, with the most recent files at the top of the list.
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To resend a data file to the target location(s) specified in the data feed, click **Resend to Host**.

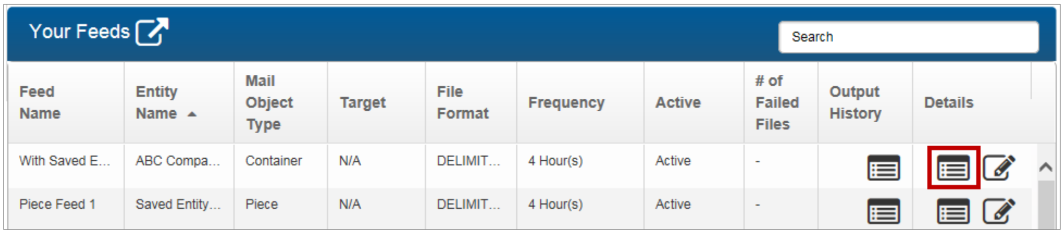
  Note: Some files may not be available to resend.
- To download a data file, click **Download**.

  Note: Some files may not be available to download.
- To print the output list, click **Print**.
- To export the output list, click **Export As**. A pop-up window appears. Select **CSV** or **PDF**, and then click **Export**.
- To close the window, click **Close** OR click the **X** icon.

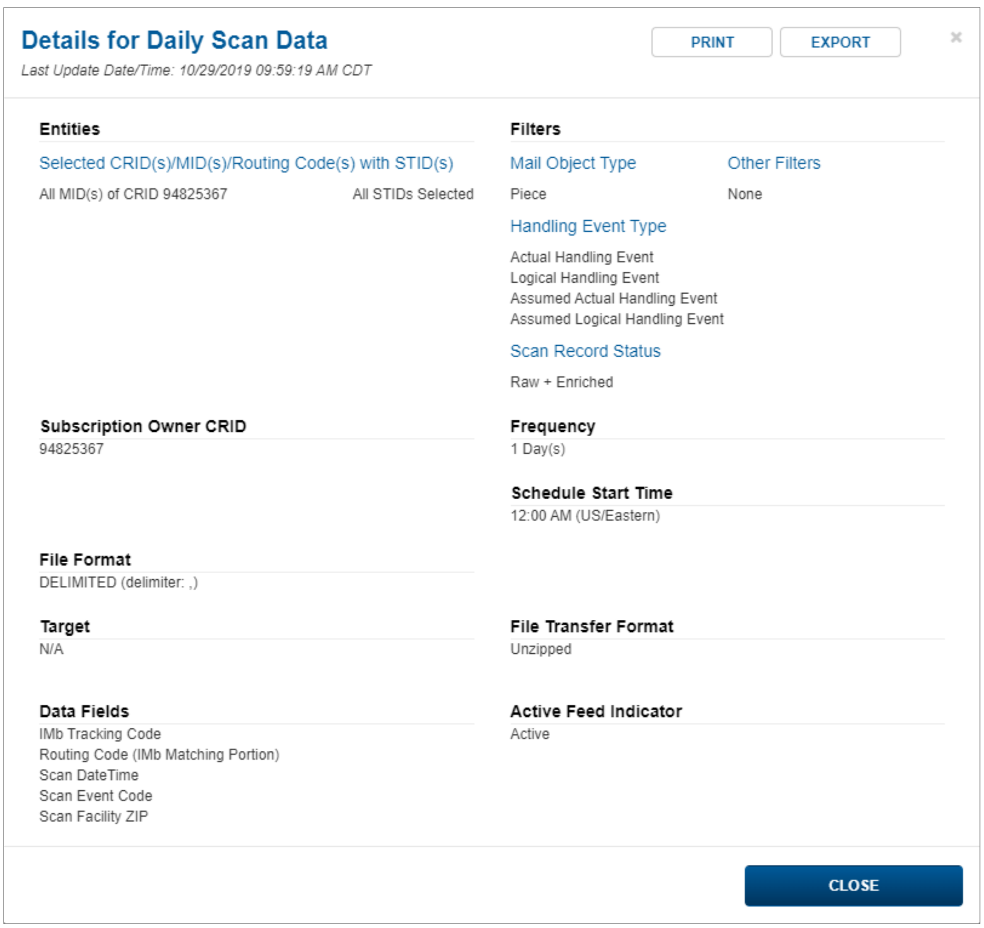
For information about opening a downloaded IV-MTR file in Microsoft Excel, see Appendix F: *Import CSV or TXT File into Microsoft Excel*.

8.2.2 View Details

To view the full details for a data feed, click the details icon in the **Details** column for that data feed.



The Details window opens and displays additional information for the data feed, including the feed name, selected entity(s), subscription owner CRID, file format, target, filters, frequency, and active feed indicator. Additional information displays depending on the file format of the selected data feed.



In the Details window:

- To print the window, click **Print**.
- To export the window as a PDF document, click **Export**.

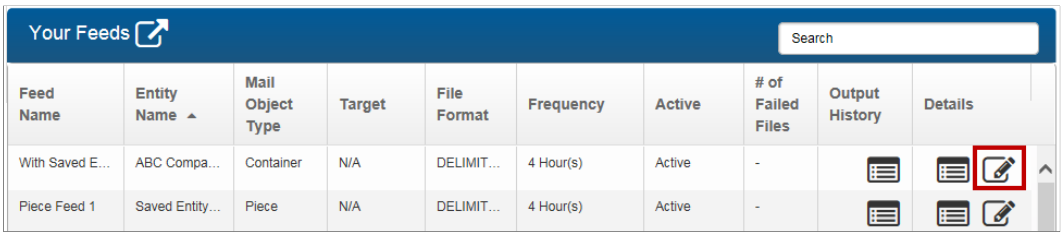
- To close the window, click **Close** OR click the **X** icon.

8.2.3 Modify Details

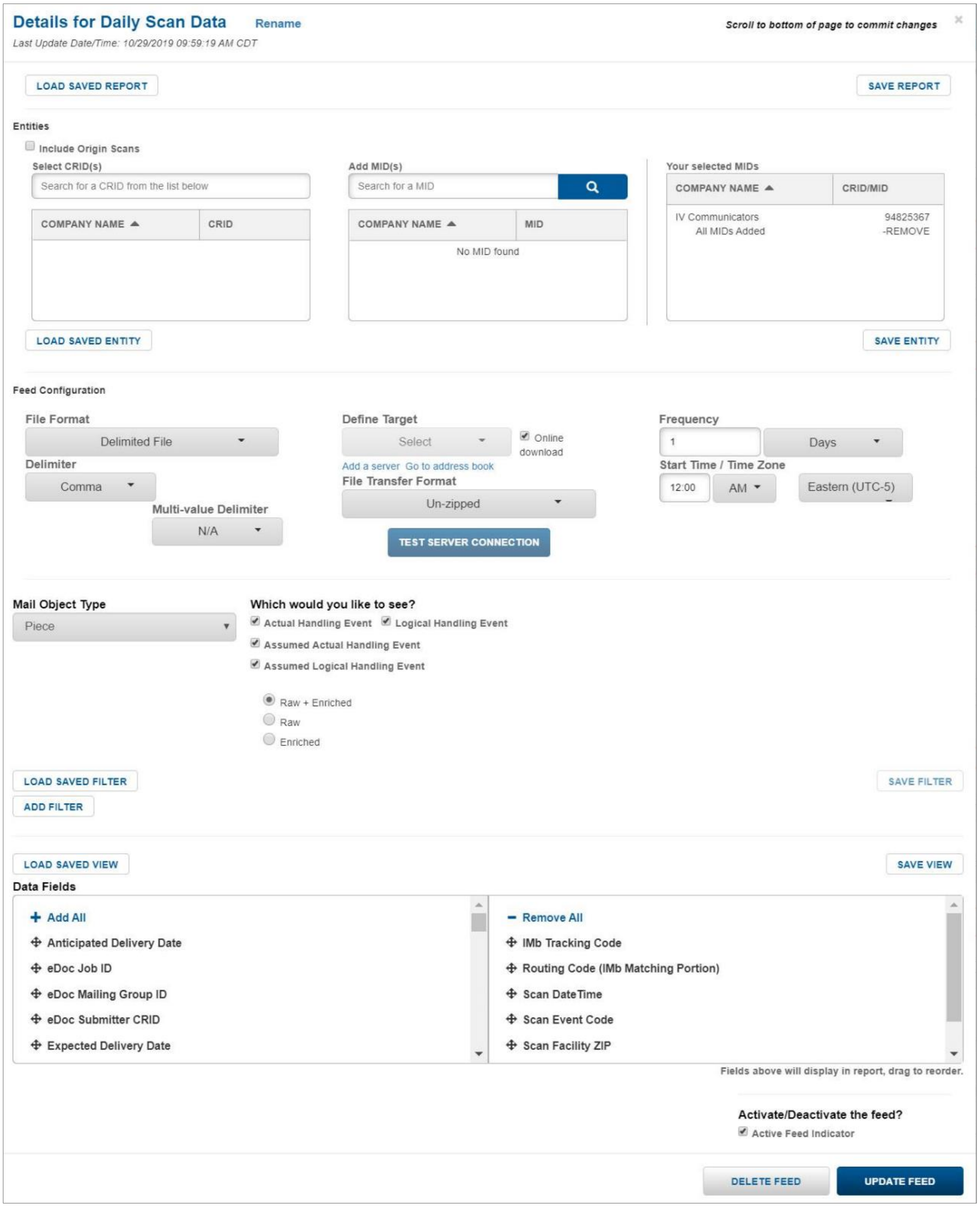
Important:

- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can modify a data feed.
- You cannot modify the **Mail Object Type** in an existing data feed. To receive data for a different mail object type, you must create a new data feed.
- You can change the **File Format** for an existing data feed, but you may not be able to select from all available file formats. If the file format you want to choose is not an option, you must create a new data feed to use that format.

To modify the details for a data feed, click the modify icon in the **Details** column for that data feed.



The Details window opens and provides the ability to modify or delete the feed.



In the Details window:

- To change the name of the feed, click **Rename** at the top left. Enter the new name, and click **Save**. Then, scroll to the bottom of the page and click **Update Feed** to commit the changes. A confirmation screen will appear.
- To delete the feed, click **Delete Feed** at the bottom right. Click **Yes** when prompted to confirm that you want to delete the feed.

- To modify the data feed, make the desired updates. Then, scroll to the bottom of the page and click **Update Feed** to commit the changes. A confirmation screen will appear.
- If the data feed is NOT associated to a saved entity, the area to modify the selected entities for the data feed functions similarly to the Select Entity(s) screen when creating a data feed. For information about the functionality, see Section 8.1.2: *Select Entity(s)*.
- If the data feed is associated to a saved entity, see Section 13.1.6: *Update a Saved Entity Associated to a Data Feed* for instructions to update the saved entity. To disassociate the saved entity from the data feed, see Section 13.1.7: *Disassociate a Saved Entity from a Data Feed*.
- To close the window without saving your changes, click the **X** icon.

8.2.4 Activate/Deactivate a Data Feed

Important:

- When you create a new data feed, it is automatically activated.
- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can activate or deactivate a data feed.

When a data feed is active, the application sends data to the target location according to the feed settings. When a feed is inactive, the application does not send the data.

To activate or deactivate a data feed:

1. Within the **Create & Manage Data Feeds** tab, find the feed in the **Your Feeds** table. In the **Details** column, click the modify icon.
2. The Details window opens. At the bottom of the window, check the **Active Feed Indicator** box to activate the data feed or uncheck the box to deactivate the feed.

3. At the bottom-right of the window, click **Update Feed**. The feed is activated or deactivated accordingly.

9 Data Delegation

Important:

- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation's creation or effective date. For example, if a data delegation rule was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party's handling events from 11/15/2017.
- Data delegation rules only provide visibility for the data types available for delegation at the time of the request. If a new data type becomes available, the Receiving party will need submit a new data delegation request to receive that data type.

Within the application, your CRID can **receive** mail tracking visibility **from** another CRID or MID through data delegation. This allows users for your CRID or MID to perform one-time queries or set up data feeds to receive data from the Delegating CRID or MID. In addition, your CRID can **provide** mail tracking visibility **to** another CRID or MID through data delegation.

Note that Mail Tracking Visibility applies to scan data only. Non-restricted / non-sensitive data such as CRID, CRID Name, and Business Address is available to all authenticated users of the IV-MTR application. Data Delegation rules do not apply to non-restricted CRID data.

Only want to <u>share</u> your mail tracking data?

The IV-MTR application allows you to access and manage mail tracking data for your organization. If your organization would like to delegate its mail tracking information to a third party (such as a mail service provider) instead of directly accessing the tracking information, 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.*

Users have mail tracking visibility in IV-MTR by 1) having the IV-MTR service and 2) through data delegation rules. The IV-MTR service in the BCG provides access to the IV-MTR web application and visibility of the CRID of which you have the service. Data delegation provides visibility from a Delegating CRID or MID to a Receiving CRID or MID. Follow the recommendations below to choose which method you should use to get visibility:

- **If the CRID or MID for which you need visibility is owned by your company, request the IV-MTR service for that CRID.**

  If your company has more than one CRID, users must request the IV-MTR service for **each** CRID for which the users require mail tracking visibility.

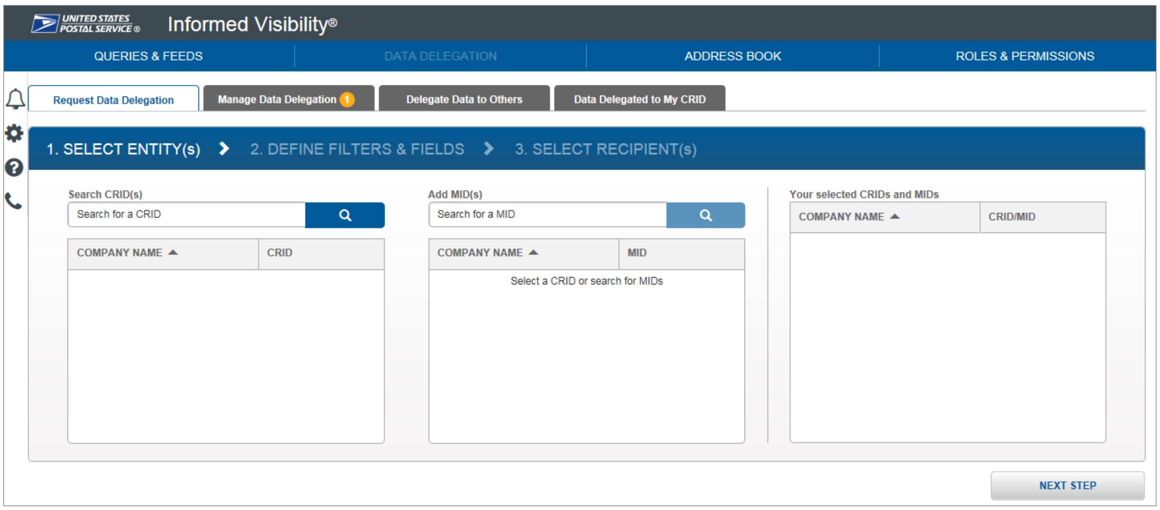
  Alternatively, the IV-MTR BSAs or BSA Delegates for the other CRIDs could delegate visibility from those CRIDs to a central CRID. Users would then only need to request the IV-MTR service for this central CRID. The IV-MTR BSA or BSA Delegate would need to have the IV-MTR service for all of the company's CRIDs, and be the IV-MTR BSA or BSA Delegate for all of the company's CRIDs, to be able to do this.

- **If the CRID or MID for which you need mail tracking visibility is NOT owned by your company, request the IV-MTR service for the CRID that IS owned by your company.**

  Then, within the IV-MTR application, submit a data delegation request to the Delegating CRID to ask that mail tracking visibility be delegated to your company's CRID or MID. The Delegating CRID will need to review and approve the data delegation request before visibility is provided.

  Alternatively, the IV-MTR BSA or a BSA Delegate for the Delegating CRID could also create a data delegation rule to provide mail tracking visibility of their CRID or MID to your company's CRID or MID instead of your CRID submitting the request.

To access these functions, click **Data Delegation** in the top navigation bar.



The following describes the four tabs in this section of the application. Please note whether you can see all four tabs and the functionality available on these tabs depends on your BCG access level and IV-MTR application user role:

- **Request Data Delegation:** Request to **receive** visibility from another CRID or MID, view the history of such requests, and cancel a pending request
- **Manage Data Delegation:** View, approve, and deny requests to **provide** visibility to another CRID or MID; view the history of such requests; and modify or delete an existing rule to **provide** visibility to another CRID or MID
- **Delegate Data to Others:** Create a delegation rule to **provide** visibility to another CRID or MID
- **Data Delegated to My CRID:** View active data delegation rules to **receive** visibility from another CRID or MID and delete existing rules to stop **receiving** visibility from another CRID or MID

See the following sections for additional information about each tab.

9.1 Request Data Delegation

Important:

- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation's creation or effective date. For example, if a data delegation rule was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party's handling events from 11/15/2017.
- Data delegation rules only provide visibility for the data types available for delegation at the time of the request. If a new data type becomes available, the Receiving party will need submit a new data delegation request to receive that data type.
- 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. For information, see Section 12.4: *Managing Notification Preferences*.

On this tab, you can request to **receive** visibility from another CRID or MID, view the history of such requests, and cancel a pending request.

9.1.1 Request Data Delegation

Important: Only an IV-MTR BSA, BSA Delegate, Data Delegation Manager, or Report Manager can submit a data delegation request for his or her CRID to **receive** visibility from another CRID or MID.

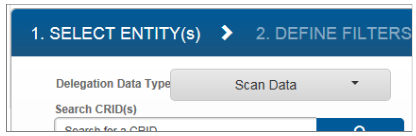
The general steps for requesting visibility of another CRID or MID's mail tracking data are as follows:

1. In the Select Entity(s) section of the page, search for and add the CRID(s) or MID(s) for which you want visibility.
2. When finished, click **Next Step**.
3. On the Define Filters & Fields screen, select the mail object type(s) and handling event type(s) for which you want visibility. You may also set filters and select data fields (if applicable).
4. When finished, click **Next Step**.
5. On the Select Recipient(s) screen, select the CRID(s) or MID(s) you would like to receive visibility of the other CRID or MID's data.
6. When finished, click **Submit Request**.
7. Review your selections, and click **Confirm**. The application sends your request to the Delegating CRID for approval.

See the following sections for additional information. For information about using a saved filter or view to request data delegation, see Section 12: *Notifications*.

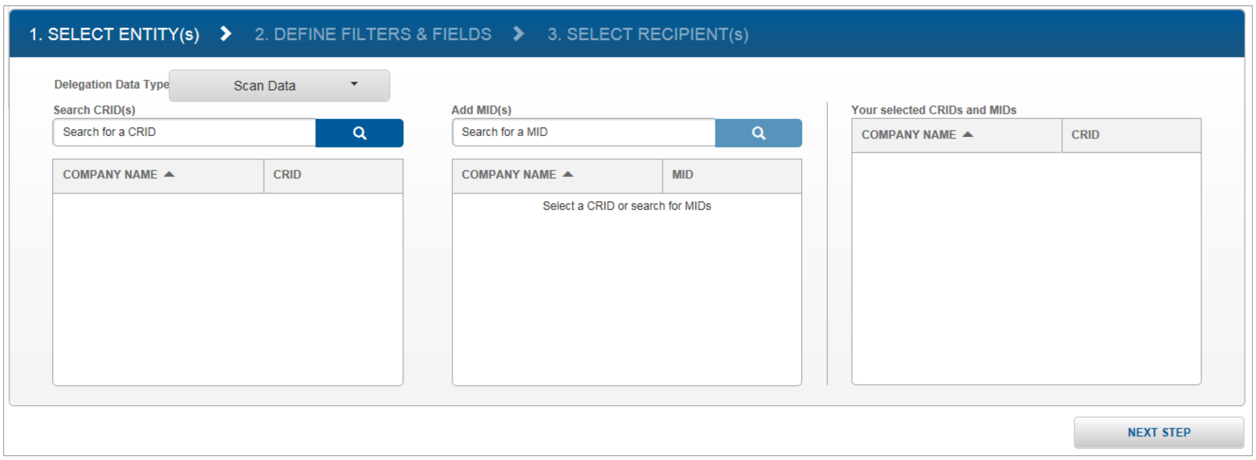
9.1.1.1 Select Entity(s)

On this screen, begin by selecting the data type for the delegation.



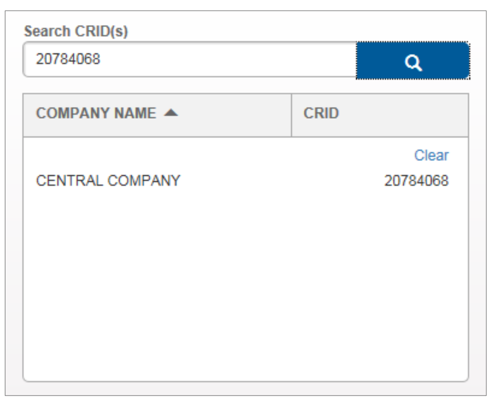
Then, search for and add the CRID(s) or MID(s) from which you want to receive visibility. You may do this in two ways. The following sections provide instructions for each option:

- **Option 1:** Search for CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

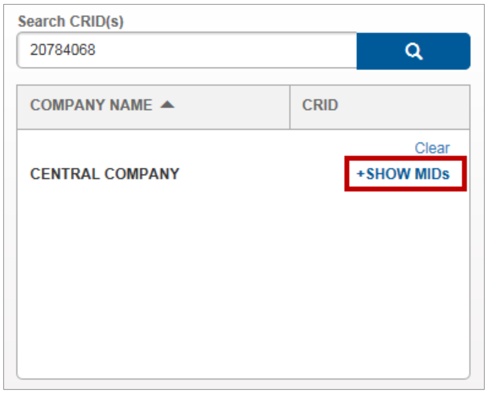


9.1.1.1.1 Option 1: Search for CRID(s), then Add MID(s)

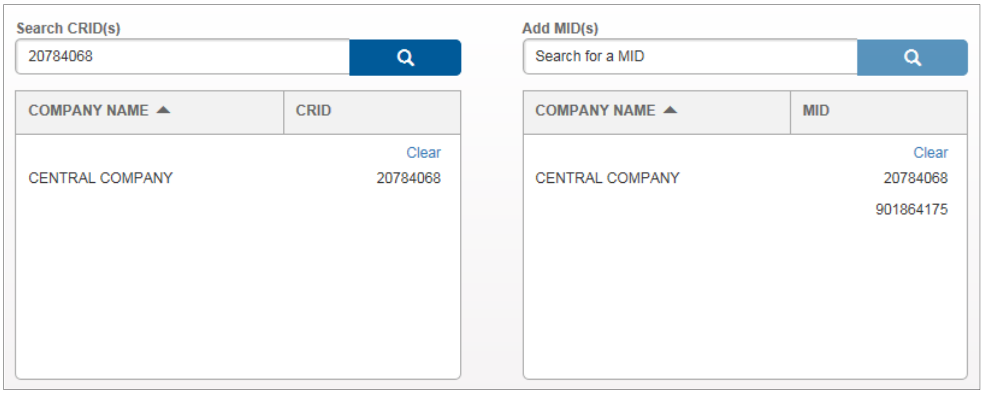
To search for a CRID, type three or more characters from the CRID number into the search box and click the search button or press **Enter**. CRIDs appear based on the search criteria.



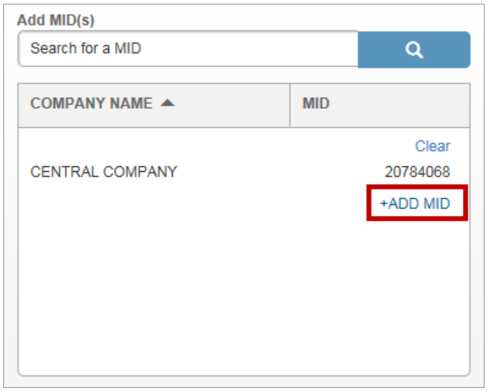
To select a *single* CRID, hover on the CRID number and click **Show MIDs**.



The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.

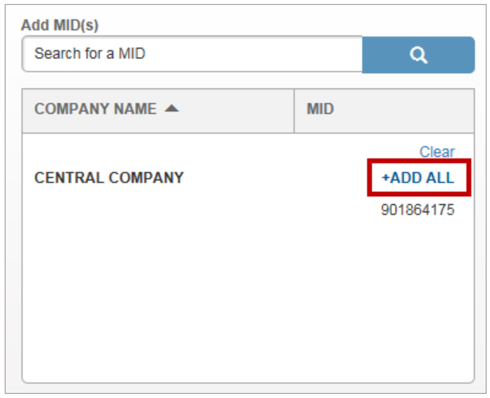


From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.



To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

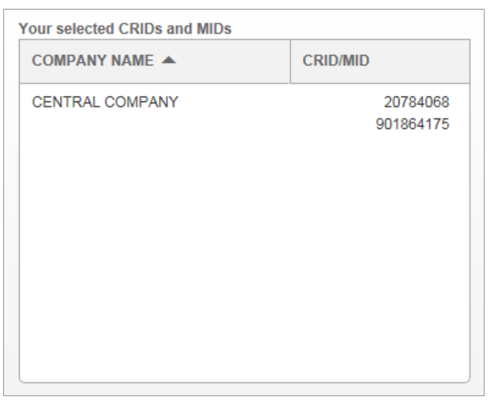
Important: Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

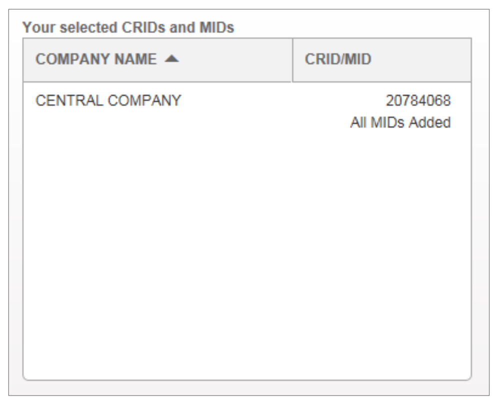


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Search CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All**, this section specifies that all MIDs were added.



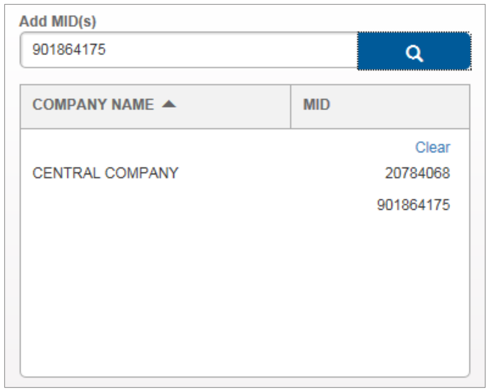


Repeat the steps above to add additional CRIDs or MIDs as desired. When you are finished, click **Next Step**.

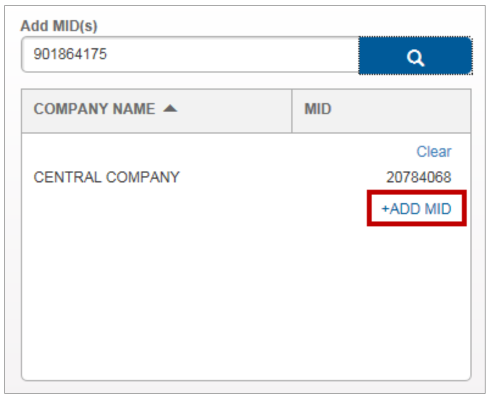
9.1.1.1.2 Option 2: Directly Add MID(s)

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs appear based on the search criteria.

Note: The CRID number appears above the MID number(s), to the right of the company name.

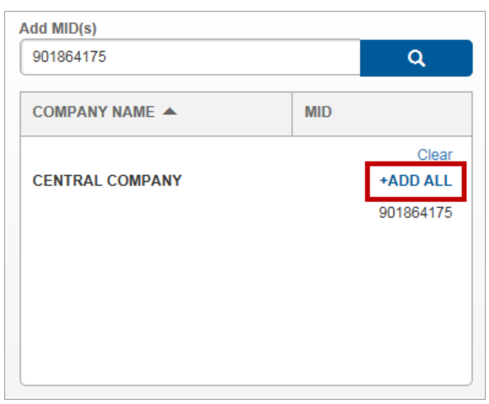


To add a *single* MID, hover on the MID number and click **Add MID**.



To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

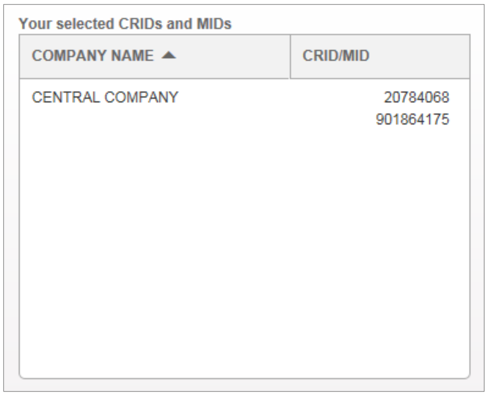
Important: Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

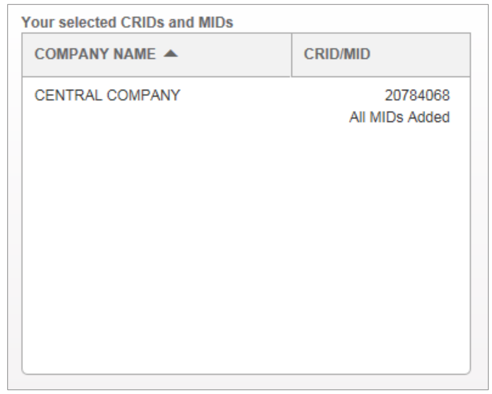


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Search CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All**, this section specifies that all MIDs were added.

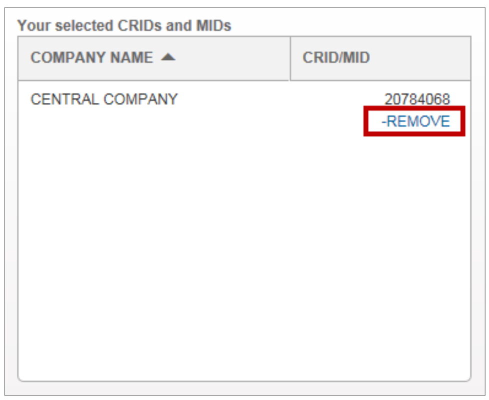




Repeat the steps above to add additional MIDs as desired. When you are finished, click **Next Step**.

9.1.1.1.3 Remove Selected Entity(s)

To remove a selected CRID or MID, go to the **Your selected CRIDs and MIDs** section. Click **Remove** for the entity you wish to remove.



9.1.1.2 Define Filters & Fields

The Define Filters & Fields screen has additional options for you to customize the delegation request. The following table describes the functions of each area of the screen.

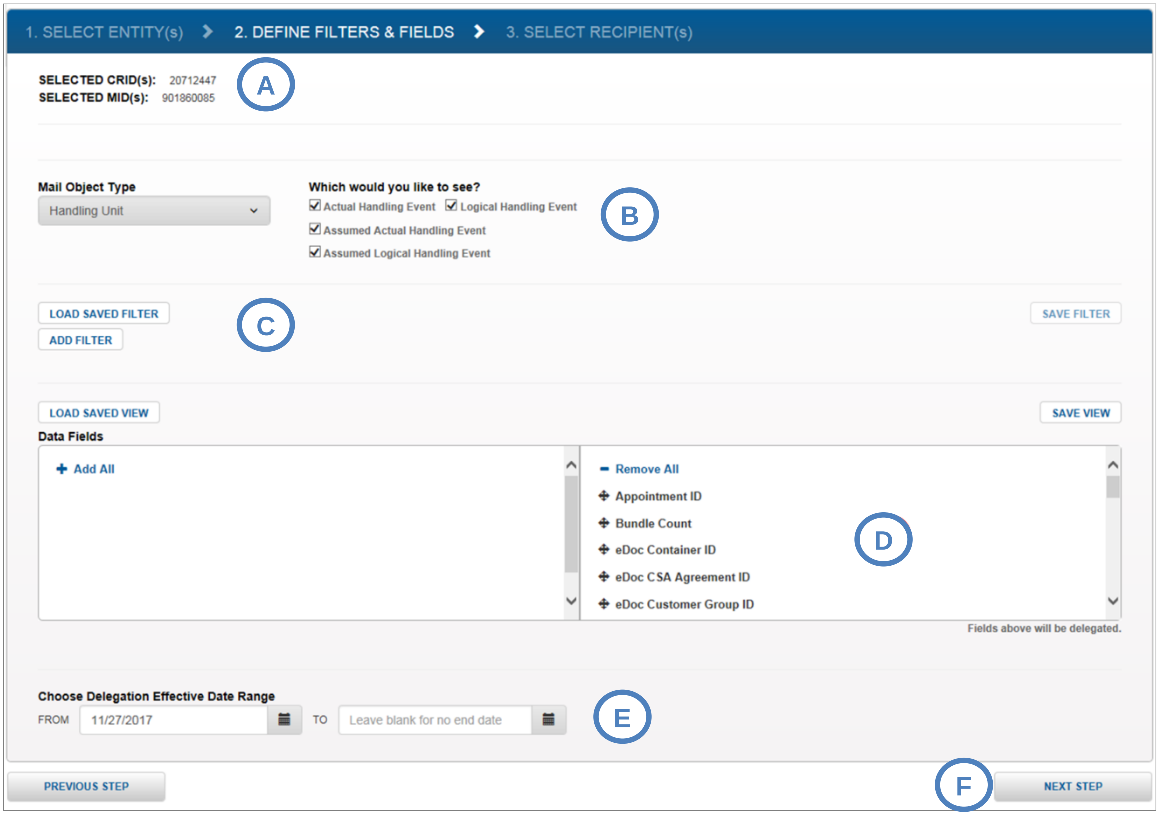


Table 9.1: Request Data Delegation Define Filters & Fields Screen Functions

Screen Area	Description
A	View the CRID(s) or MID(s) selected for the delegation request
B	Select the mail object type and handling event type(s) for which you want visibility
C	Add filters to refine the delegation request (optional) **Note:** Filters are not available if you select “All” for **Mail Object Type**.
D	Select the data fields for which you want visibility **Note:** If you select “All” for **Mail Object Type**, the application includes all available data fields for all mail object types in the delegation request.
E	Choose the date range for the delegation to be active
F	Click **Next Step** to go to the Select Recipient(s) screen

For additional information about the options on this screen, see the following sections.

9.1.1.2.1 View Selected Entity(s)

This area displays the CRID(s) or MID(s) of which you are requesting visibility.

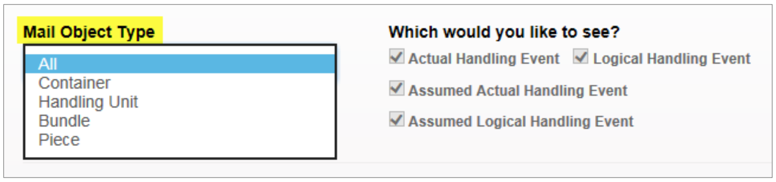
9.1.1.2.2 Select Mail Object and Handling Event Type(s)

Important: At this time, you can only select one mail object type OR select **All** to include all four mail object types. If you want visibility of more than one mail object type *but not all mail object types*, you must submit a separate data delegation request for each additional mail object type.

In this area, select the mail object type and handling event type(s) for which you would like to receive visibility.

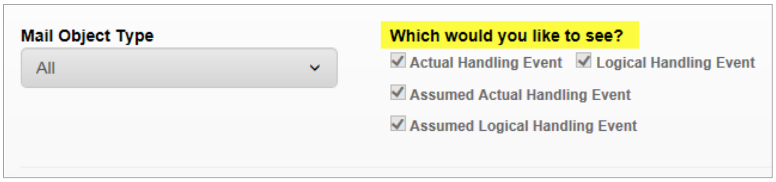
To select the mail object type, make a selection from the **Mail Object Type** drop-down menu.

Note: Selecting **All** includes all four mail object types.



To select the handling event type(s), check the box for the desired handling event type(s) under **Which would you like to see?**. You may select more than one handling event type.

Note: Some handling event types are not yet available or are only available for a particular mail object type. However, you may request visibility now in anticipation of all handling event types being available in a future release.



9.1.1.2.3 Add Filter(s)

Note: Filters are only available if you selected one mail object type. At this time, you cannot add a filter to a data delegation request if you selected **All** for **Mail Object Type**.

In this area, you may add filters to limit the data to which you want visibility. To add a filter:

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.

   Note: The fields available depend on the mail object type selected.

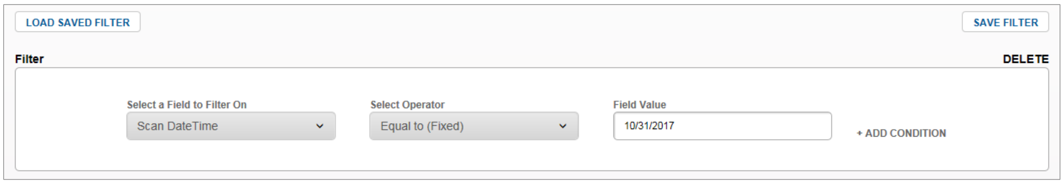
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.

   Note:

   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.

- The **Between** operator is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.

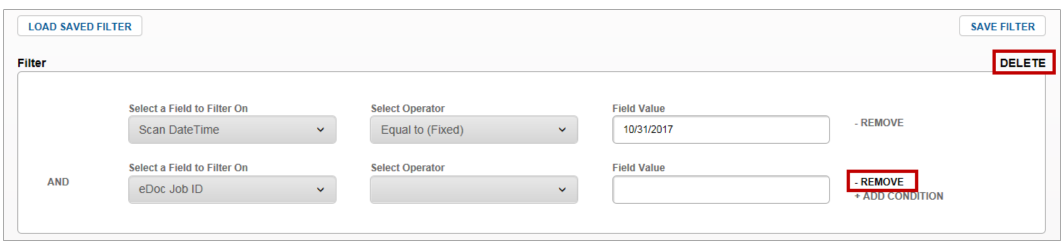
4. In the **Field Value** field, enter the filter criteria value.



Note: The *One of* and *Not One of* operators allow multiple field values. Separate values by commas without a space (e.g., 123456,123457,123458).

To add an additional filter, click **Add Condition**. A second filter section appears. Follow steps 2-4 above to select the filter options.

To remove all filters, click **Delete** in the upper-right corner of the filter section. To remove one filter, click **Remove** to the right of the filter you wish to remove.



For information about using a saved filter, see Section 13.2: *Saved Filter*.

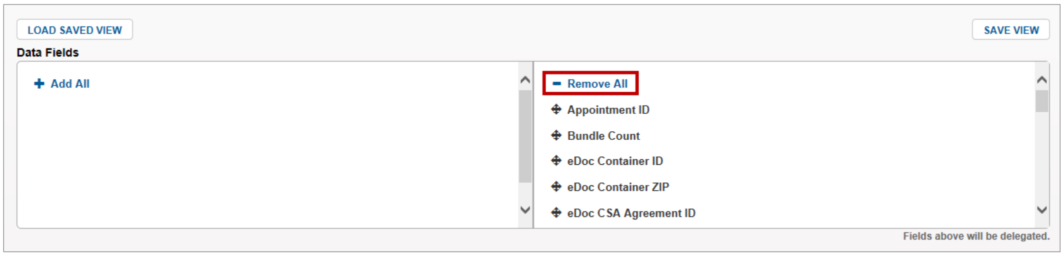
9.1.1.2.4 Select Data Fields

Note:

- You may only select data fields if you selected one mail object type. If you selected **All** for **Mail Object Type**, all available data fields for all mail object types are included in the data delegation request.
- You can drag to reorder data fields in this section; however, the order of data fields in a data delegation request has no impact on your visibility or the way those data fields will display in results for a one-time query or data feed. For a one-time query or data feed, you select the display order of fields when creating the query or feed.
- For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.

In this area, select the data fields for which you would like visibility. The available data fields vary based on the selected mail object type. By default, all data fields for the selected mail object type are selected.

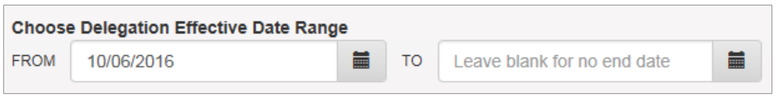
To remove a data field, drag it from the right side to the left side OR double-click the field name on the right side. To remove all of the data fields, click **Remove All** at the top of the list.



For information about using a saved view, see Section 13.3: *Saved View*.

9.1.1.2.5 Choose Effective Date Range

Choose the date range by typing in the **From** and **To** fields OR clicking the calendar icons and selecting the dates. This is the date range for the data delegation rule to be active.



Note:

- By default, the **From** date is set as today's date. However, you may select any date in the future.
- If you select today's date as the **From** date but the delegation request is not approved until a later date, the approval date becomes the **From** date. Data delegation does not provide visibility until approved by the Delegating Party. For example, if you submit the request on 4/19/2017 with that date selected as the **From** date and the request is approved on 4/26/2017, your visibility of the delegated data begins on 4/26/2017.
- You may leave the **To** date blank for no end date.
- The Delegating Company can change the effective date range.

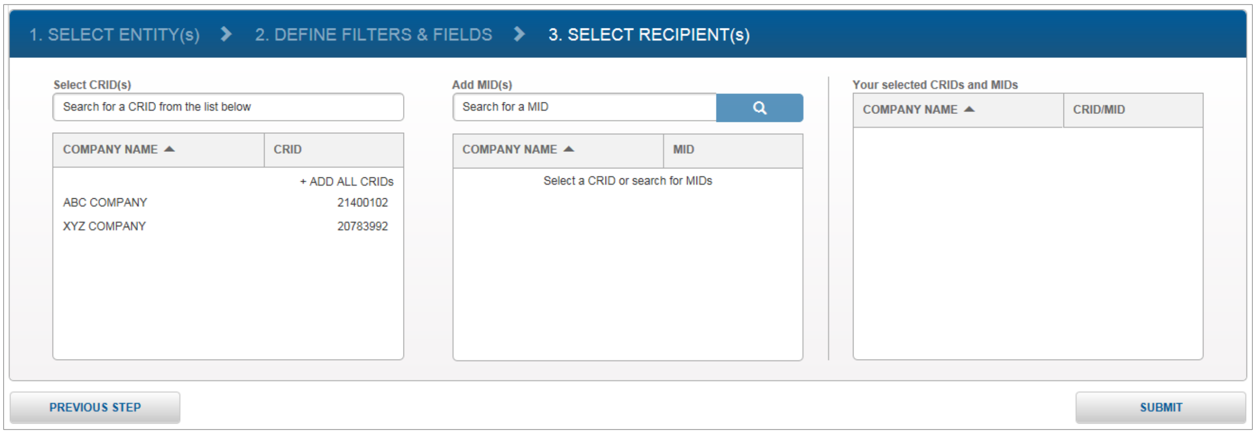
9.1.1.2.6 Go to Next Step

When you are finished on this screen, click **Next Step**.

9.1.1.3 Select Recipient(s)

On this screen, select the CRID(s) or MID(s) which you want to receive visibility of the delegated data. You may do this two ways. The following sections provide instructions for each option:

- **Option 1:** Select CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

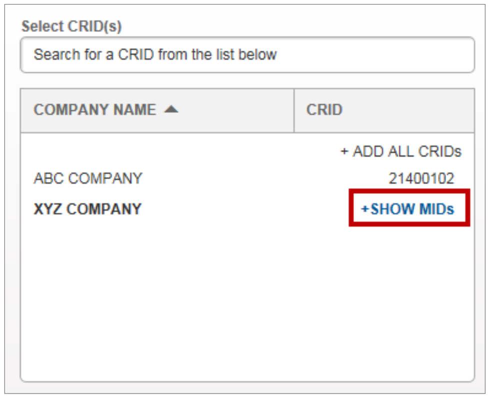


9.1.1.3.1 Option 1: Select CRID(s), then MID(s)

By default, the **Select CRID(s)** section displays the CRIDs for which you have the ability to request data delegation.

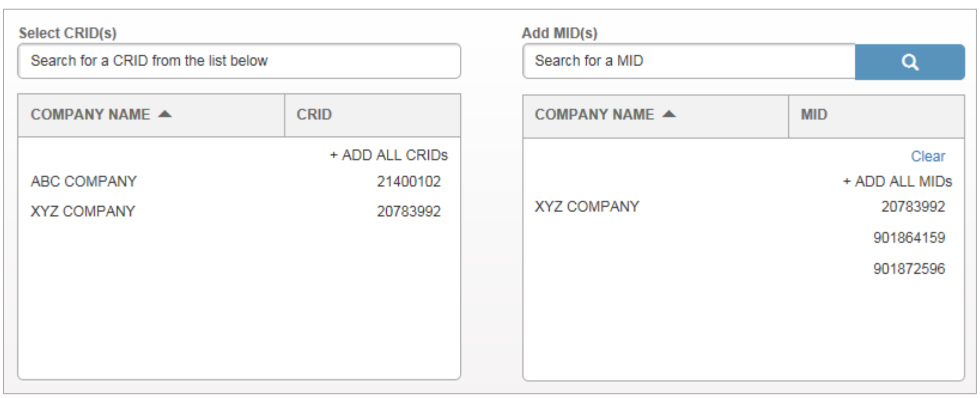
To filter this list for a specific CRID, begin typing the CRID name or number in the search box. As you type, the list displays the CRID names or numbers matching the entered text.

To select a *single* CRID, hover on the CRID number and click **Show MIDs**.

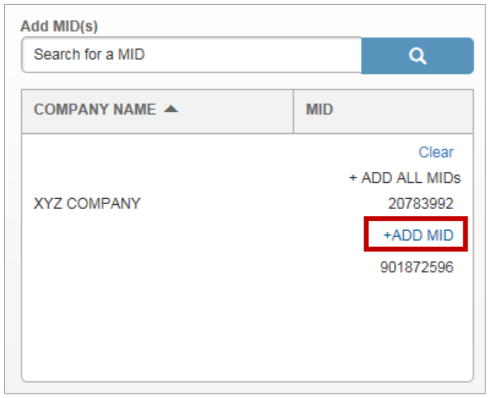


To select *all* CRIDs, click **Add All CRIDs**.

The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.

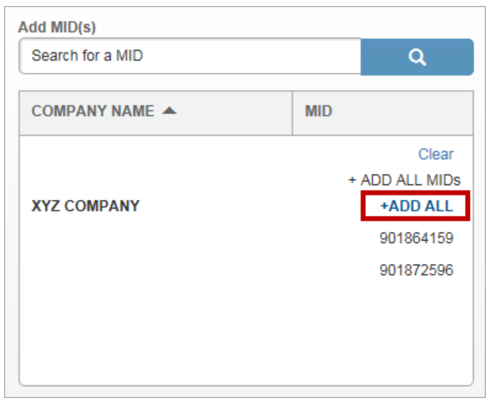


From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.



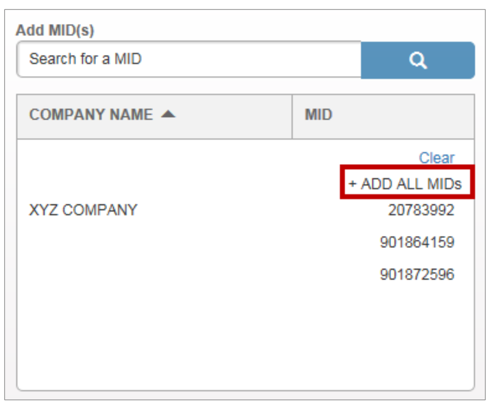
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs** at the top of the list.

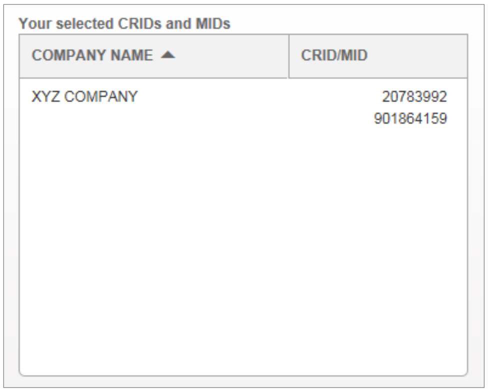
Important: This creates a CRID-level delegation request for each CRID. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.

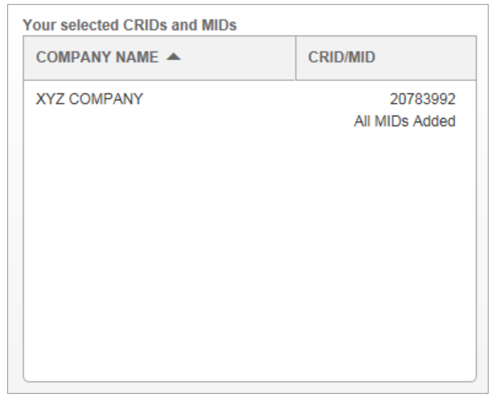


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





Repeat the steps above to add additional CRIDs or MIDs as desired.

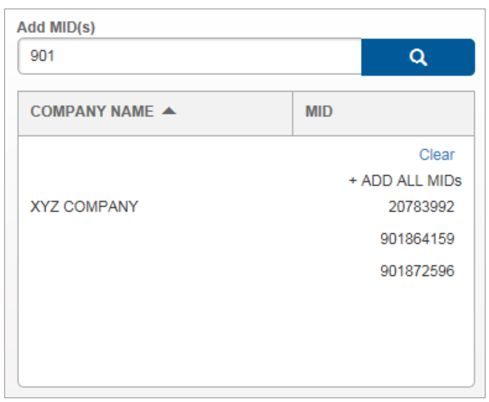
When you are finished, continue to submit the request.

9.1.1.3.2 Option 2: Directly Add MID(s)

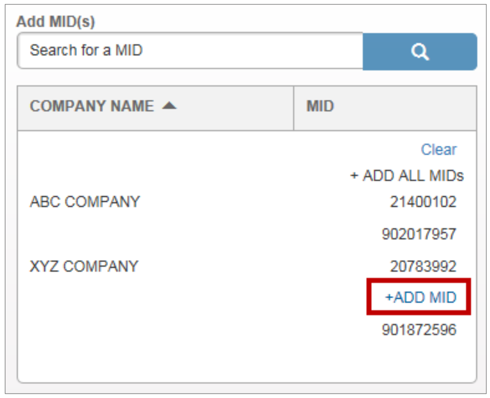
By default, the **Add MID(s)** section does **not** display all of the MIDs belonging to the CRIDs for which you have the ability to request data delegation.

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs belonging to a CRID for which you have the ability to request data delegation appear based on the search criteria.

Note: The CRID number appears above the MID number(s), to the right of the company name.

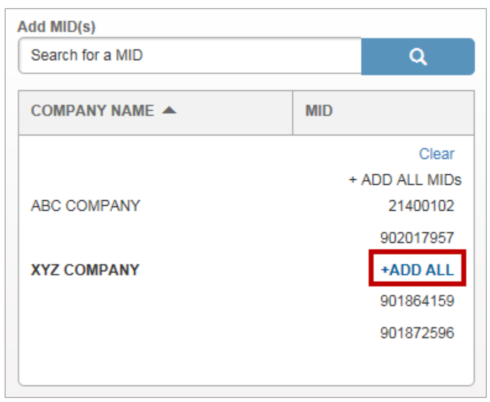


To add a *single* MID, hover on the MID number and click **Add MID**.



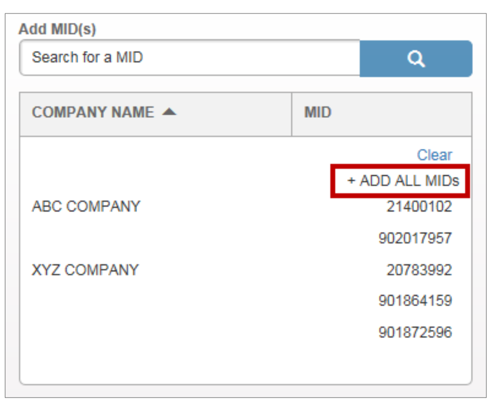
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs** at the top of the list.

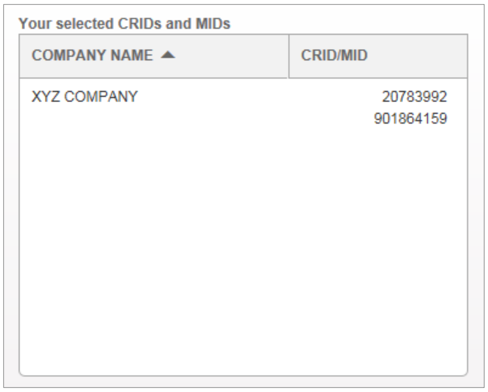
Important: This creates a CRID-level delegation request for each CRID. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.

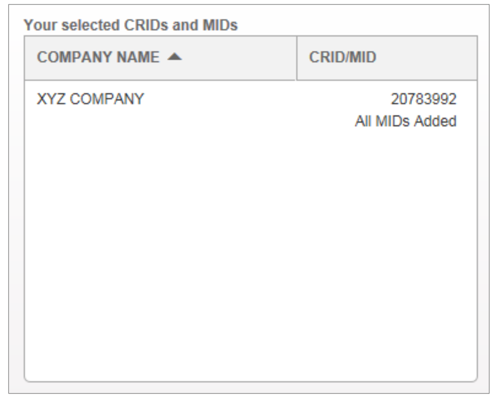


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





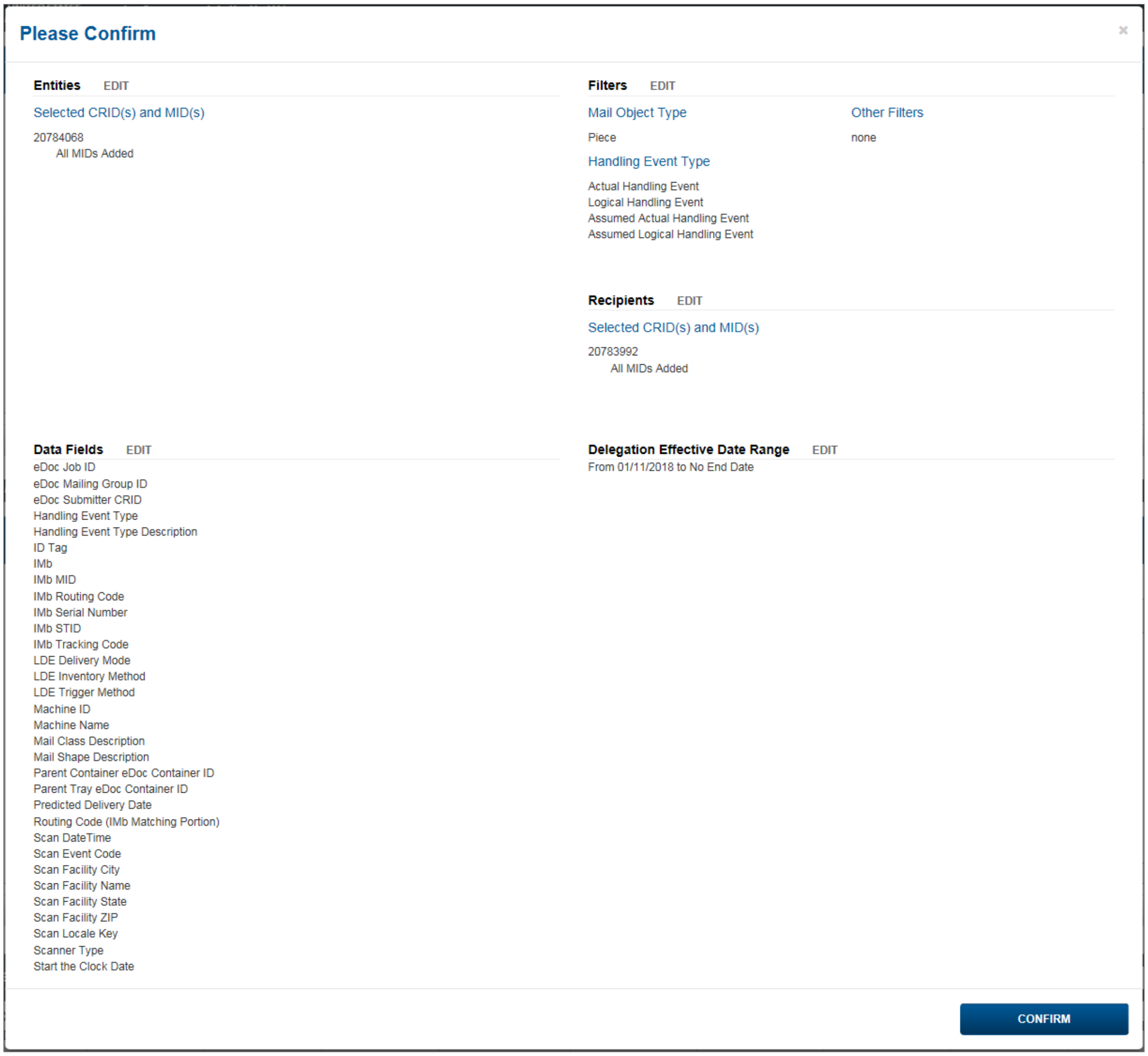
Repeat the steps above to add additional MIDs as desired.

When you are finished, continue to submit the request.

9.1.1.4 Submit Request

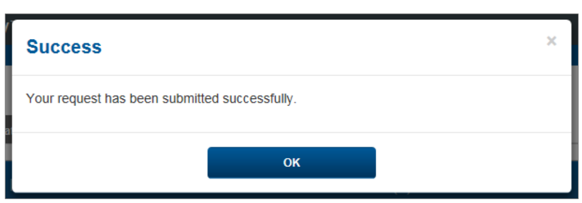
When you are ready to submit the data delegation request, click **Submit**.

A window appears for you to review your selections. To make any changes, click **Edit** in the appropriate section.



When finished, click **Confirm**. A window appears informing you that the data delegation requested was submitted successfully.

To close the window, click **OK** OR click the **X** icon.

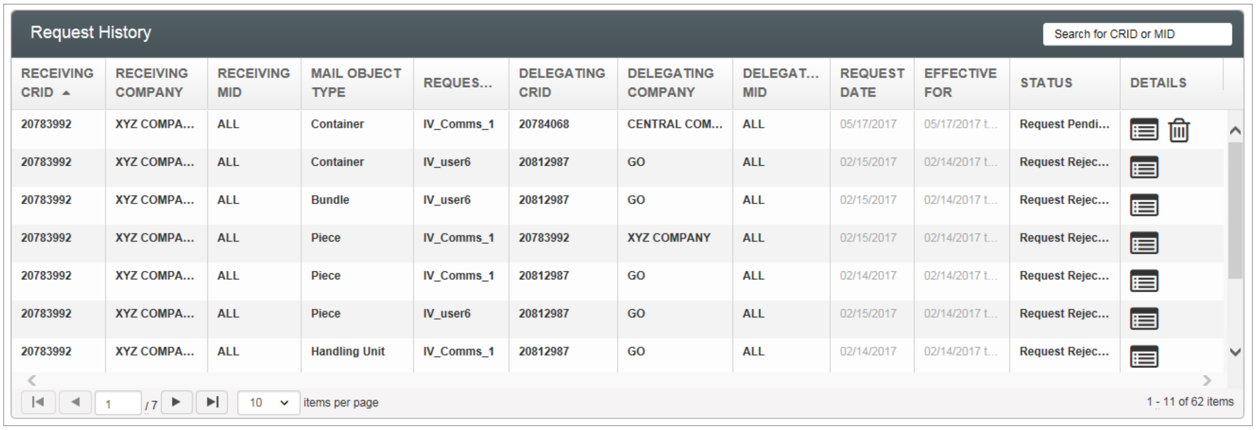


For details about viewing or canceling a pending delegation request, see Section 9.1.2: *Request History*.

9.1.2 Request History

> **Important:** Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to **receive** visibility from another CRID or MID.

The **Request History** section of this tab displays the requests submitted for your CRID(s) to receive visibility.


Request History

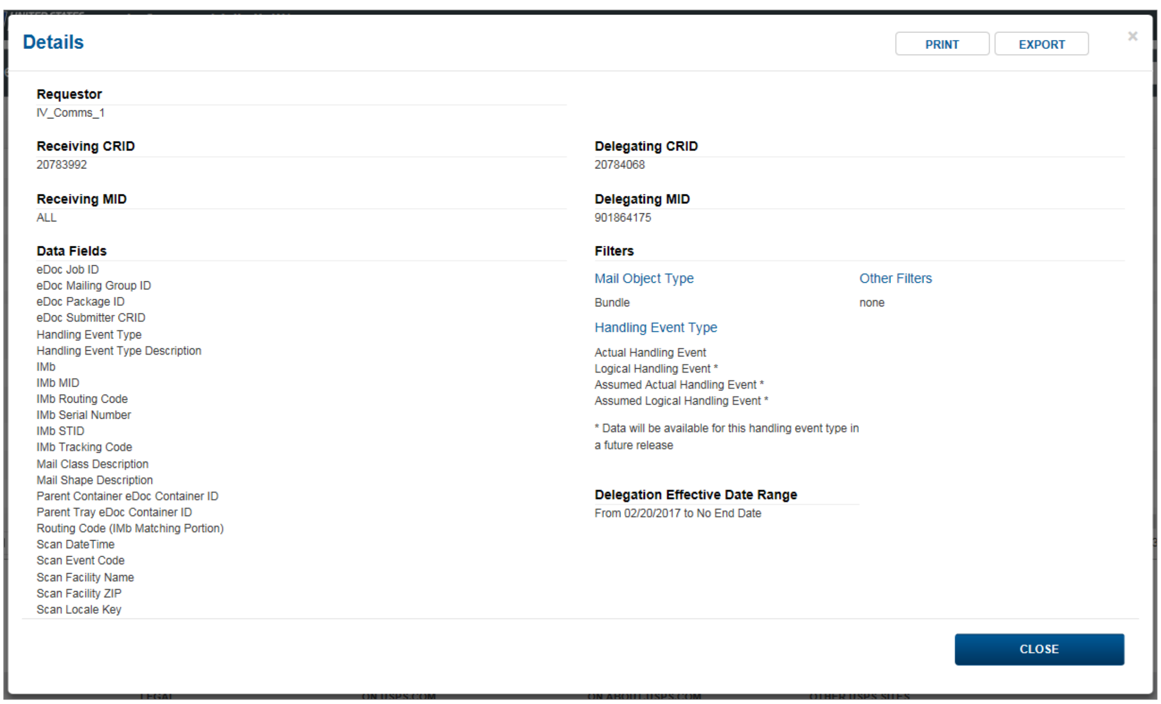
Search for CRID or MID

RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUES...	DELEGATING CRID	DELEGATING COMPANY	DELEGAT... MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
20783992	XYZ COMPA...	ALL	Container	IV_Comms_1	20784068	CENTRAL COM...	ALL	05/17/2017	05/17/2017 t...	Request Pendi...	
20783992	XYZ COMPA...	ALL	Container	IV_user6	20812987	GO	ALL	02/15/2017	02/14/2017 t...	Request Rejec...	
20783992	XYZ COMPA...	ALL	Bundle	IV_user6	20812987	GO	ALL	02/15/2017	02/14/2017 t...	Request Rejec...	
20783992	XYZ COMPA...	ALL	Piece	IV_Comms_1	20783992	XYZ COMPANY	ALL	02/15/2017	02/14/2017 t...	Request Rejec...	
20783992	XYZ COMPA...	ALL	Piece	IV_Comms_1	20812987	GO	ALL	02/14/2017	02/14/2017 t...	Request Rejec...	
20783992	XYZ COMPA...	ALL	Piece	IV_user6	20812987	GO	ALL	02/15/2017	02/14/2017 t...	Request Rejec...	
20783992	XYZ COMPA...	ALL	Handling Unit	IV_Comms_1	20812987	GO	ALL	02/14/2017	02/14/2017 t...	Request Rejec...	

1 /7 10 items per page 1 - 11 of 62 items

In this section:

- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To view additional information for a request, click the details icon in the **Details** column for that request. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the request.



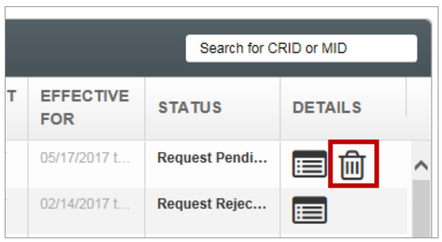
In this window:

- To print the window, click **Print**.
- To export the window as a PDF document, click **Export**.
- To close the window, click **Close** OR click the **X** icon.

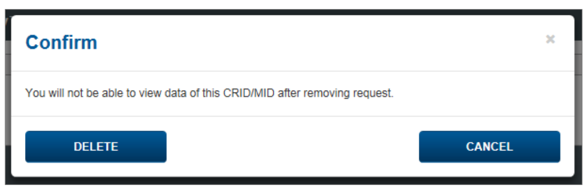
To cancel a pending delegation request:

> **Important:** Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to **receive** visibility from another CRID or MID.

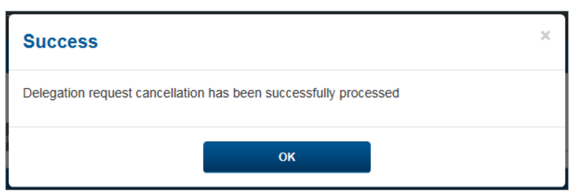
1. Click the delete  icon in the **Details** column for that request. A confirmation window appears.



2. To delete the data delegation request, click **Delete**.



3. A window appears informing you that the data delegation request has been cancelled. To close the window, click **OK** OR click the **X** icon.

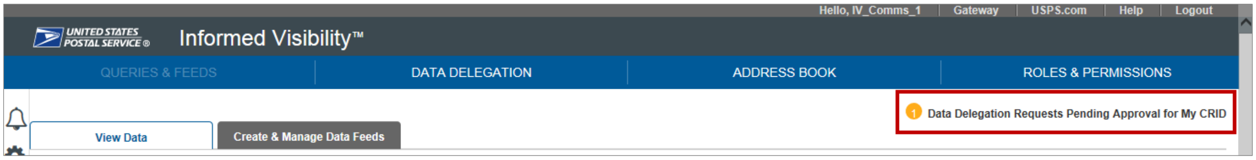


Note: Users of the Receiving CRID(s) can also cancel a pending request from the **Data Delegation Requests Pending Approval for My CRID** message, which displays on the **Queries & Feeds** tab. For more information, see Section 9.1.3: *Data Delegation Requests Pending Approval for My CRID*.

9.1.3 Data Delegation Requests Pending Approval for My CRID

Important: Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to **receive** visibility from another CRID or MID.

While a request for your CRID or MID to receive visibility is pending approval, a message in the upper-right corner of the **Queries & Feeds** tab indicates how many requests are pending approval.



Note: This message appears to any users who have the IV-MTR service for the Receiving CRID(s) in the delegation request.

For additional information, click the message. A window appears and displays information about pending requests, including the Delegating CRID and MID, mail object type, and request date.

In this window:

- For additional information about a request, click **Detail** in the **Details** column.
  - The Details window opens and provides additional details for the request.
  - To close the window, click **Close** OR click the **X** icon in the upper-right corner.
- To cancel a request, click the **X** icon to the left of the Delegating CRID. When the confirmation pop-up appears, click Yes.
- To close this window, click **Close** OR click the **X** icon in the upper-right corner.

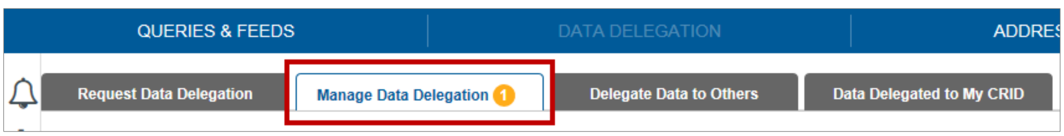
9.2 Manage Data Delegation

Important:

- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can access this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation's creation or effective date. For example, if a data delegation rule was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party's handling events from 11/15/2017.
- Data delegation rules only provide visibility for the data types available for delegation at the time of the request. If a new data type becomes available, the Receiving party will need submit a new data delegation request to receive that data type.
- 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. For information, see Section 12.4: *Managing Notification Preferences*.

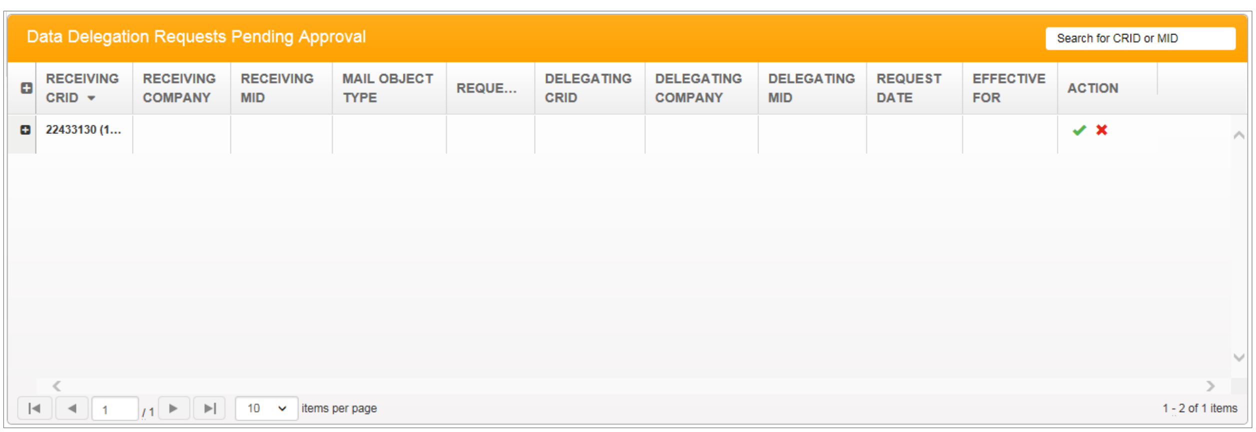
On this tab, you can view, approve, and deny requests to provide visibility to another CRID or MID; view the history of such requests; and modify or delete an existing rule to provide visibility to another CRID or MID.

If there are pending requests, the **Manage Data Delegation** tab icon shows the number pending.



9.2.1 Data Delegation Requests Pending Approval

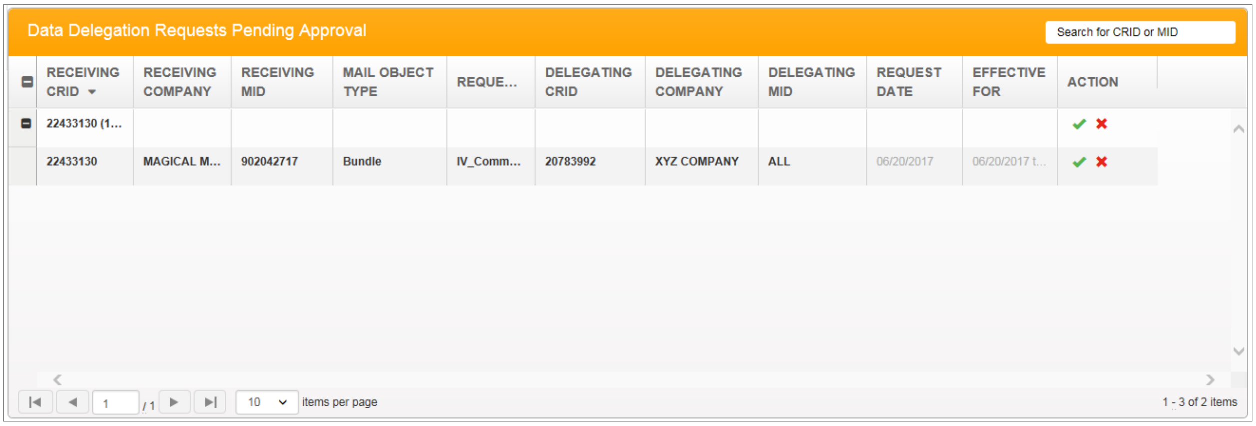
The **Data Delegation Requests Pending Approval** section of the tab displays pending delegation requests, grouped by Receiving CRID.



In this section:

- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

- To see the individual requests for a Receiving CRID and view additional details about the requests, click the **+** icon to the left of the Receiving CRID number.



The following sections provide instructions for approving or denying a request.

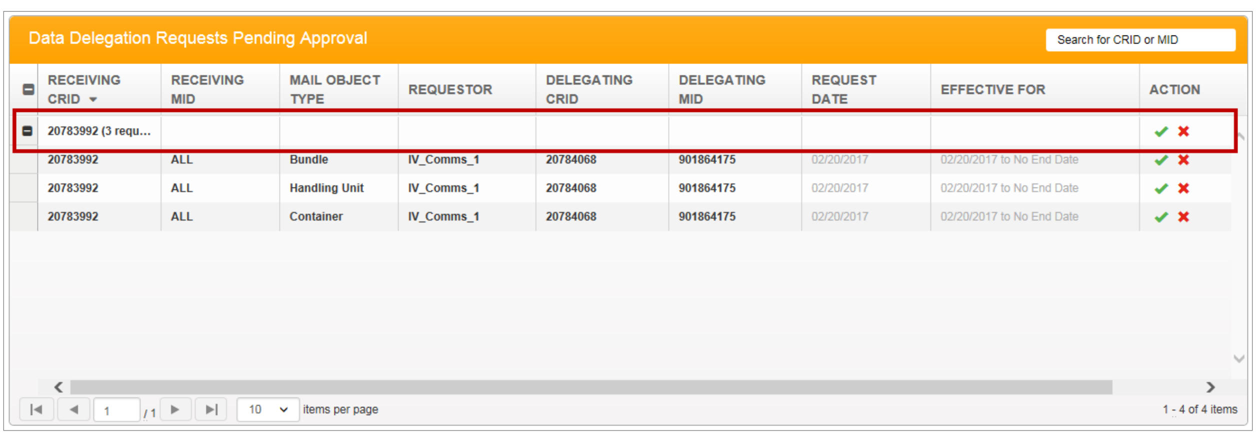
9.2.1.1 Approve Data Delegation Request(s)

If there are multiple requests from one Receiving CRID, you can approve them all at once or approve each individual request.

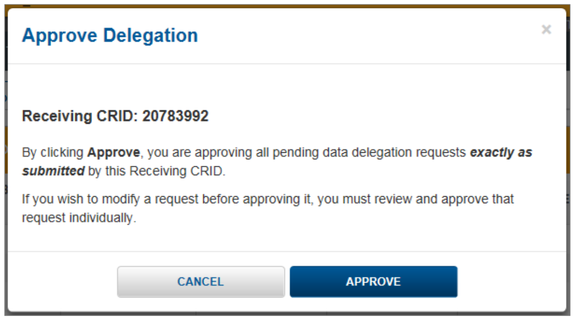
> **Important:**
>
> - If you approve all requests for one Receiving CRID at once, you approve the requests ***exactly as submitted***. If you wish to modify a request, you must review and approve it individually.
> - If you wish to modify one of the requests but not the others, review and approve the one request individually. Then, you can approve the remaining requests for the Receiving CRID together.

To approve all requests for one Receiving CRID:

1. On the top row of the grouped requests for one Receiving CRID, click the green checkmark icon in the **Action** column. A window appears.



2. Review the warning that approving the requests as a group means you are approving them exactly as submitted.

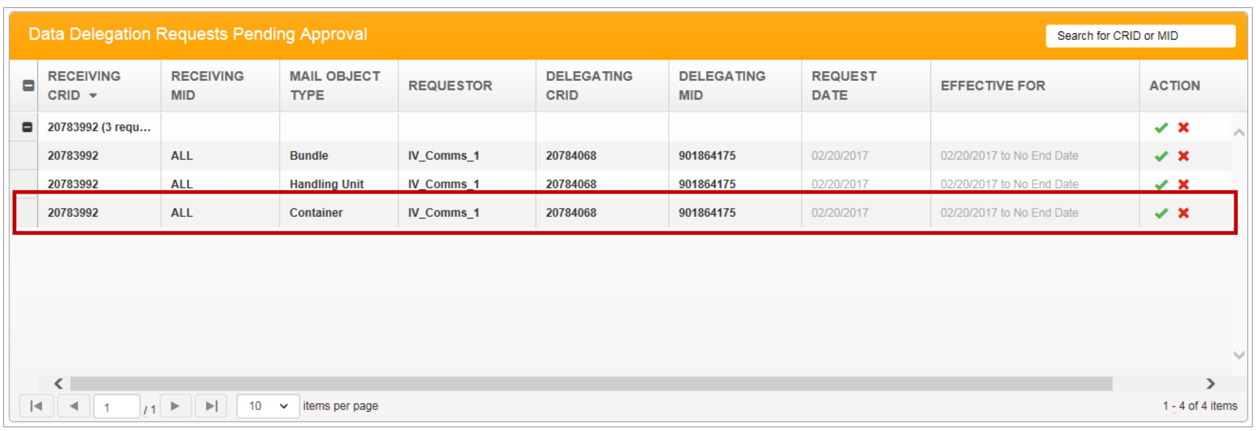


3. If you wish to approve the requests as a group, click **Approve**. Data delegation rules are created providing visibility to the Receiving CRID as approved.

   If you wish to approve the requests individually, click **Cancel** or click the **X** icon.

To approve an individual request:

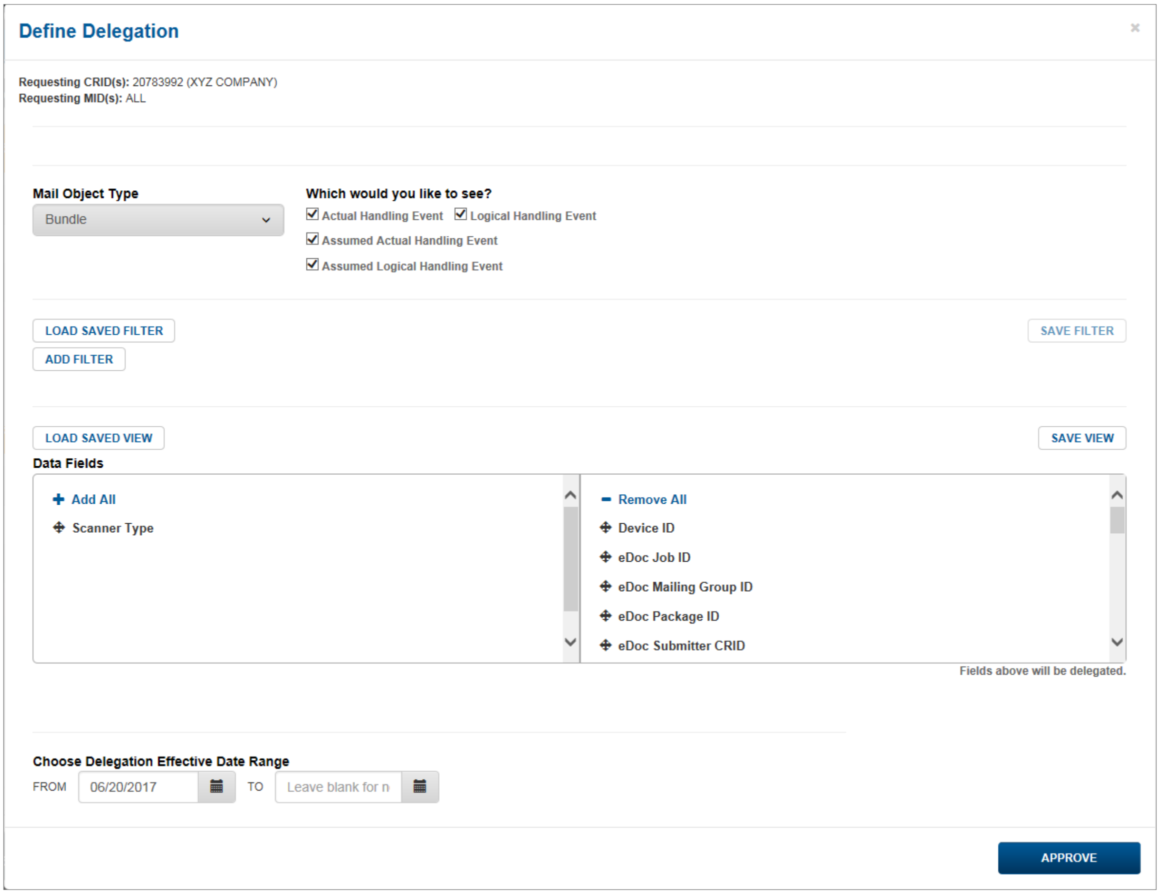
1. On the row for the request you wish to approve, click the green checkmark icon in the **Action** column. A window appears for you to define the data of which the user will have visibility.



2. In the window, make any necessary changes. You can change the mail object type, handling event type(s), add filters, select data fields, and choose the effective date range.

   Note:

   - For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.
   - For information about using a saved filter or view to approve data delegation, see Section 12: *Notifications*.



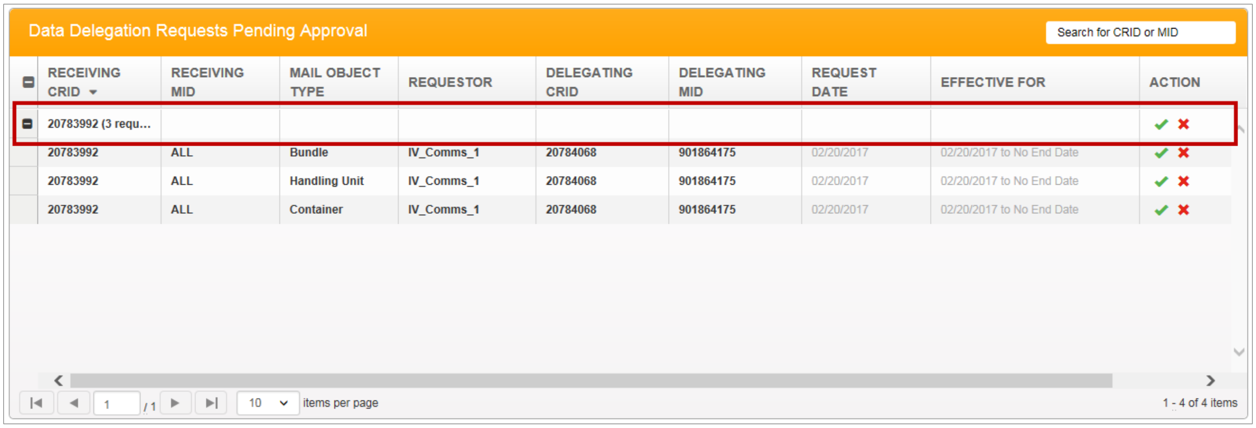
3. Click **Approve**. A data delegation rule is created providing visibility to the Receiving CRID as approved.

9.2.1.2 Deny Data Delegation Request(s)

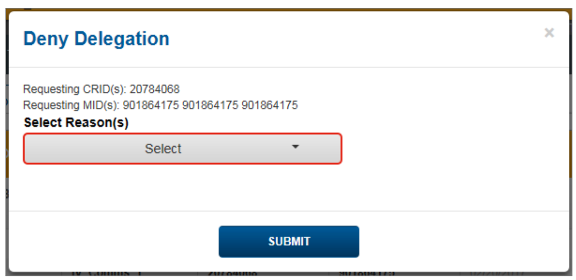
If there are multiple requests from one Receiving CRID, you can deny them all at once or deny each individual request.

To deny all requests for one Receiving CRID:

1. On the top row of the grouped requests for one Receiving CRID, click the red **X** icon in the **Action** column. A window appears.



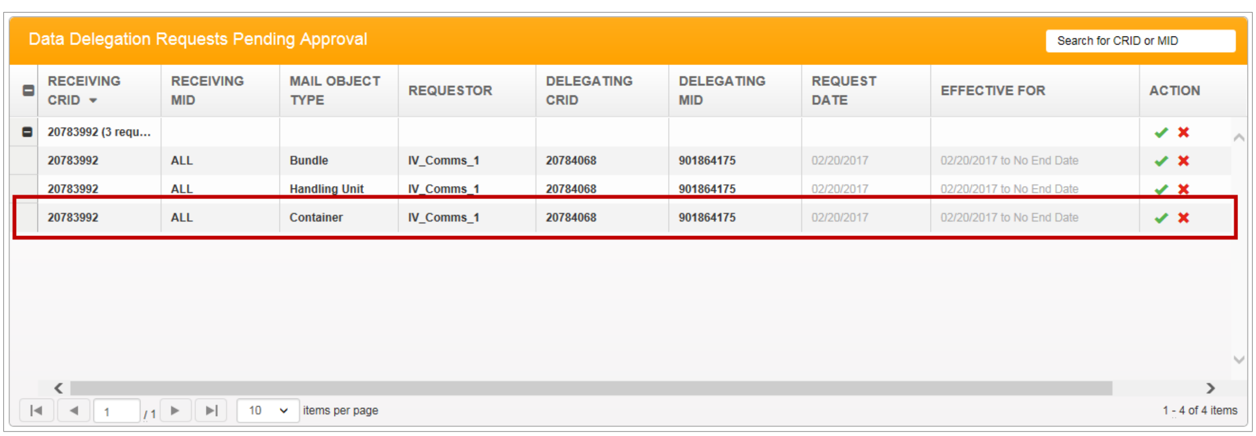
2. In the window, select one or more reasons for the denial.



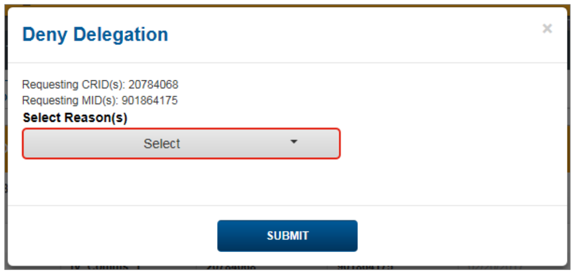
3. Click **Submit.** The application does not create data delegation rules, and the pending requests no longer appear on this screen.

To deny an individual request:

1. On the row for the request you wish to deny, click the red **X** icon in the **Action** column. A window appears.

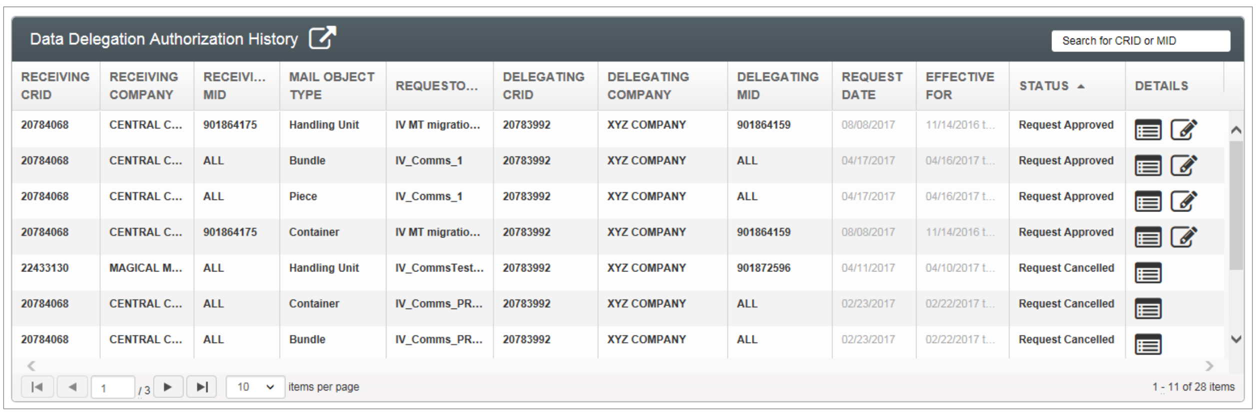


2. In the window, select one or more reasons for the denial.
3. Click **Submit**.



9.2.2 Data Delegation Authorization History

The **Data Delegation Authorization History** section of this tab displays the status of data delegation rules where visibility for your CRID's data is **provided** to another CRID or MID. You can view additional information about a data delegation request or rule, modify an existing data delegation rule, and delete an existing data delegation rule.


Data Delegation Authorization History

Search for CRID or MID

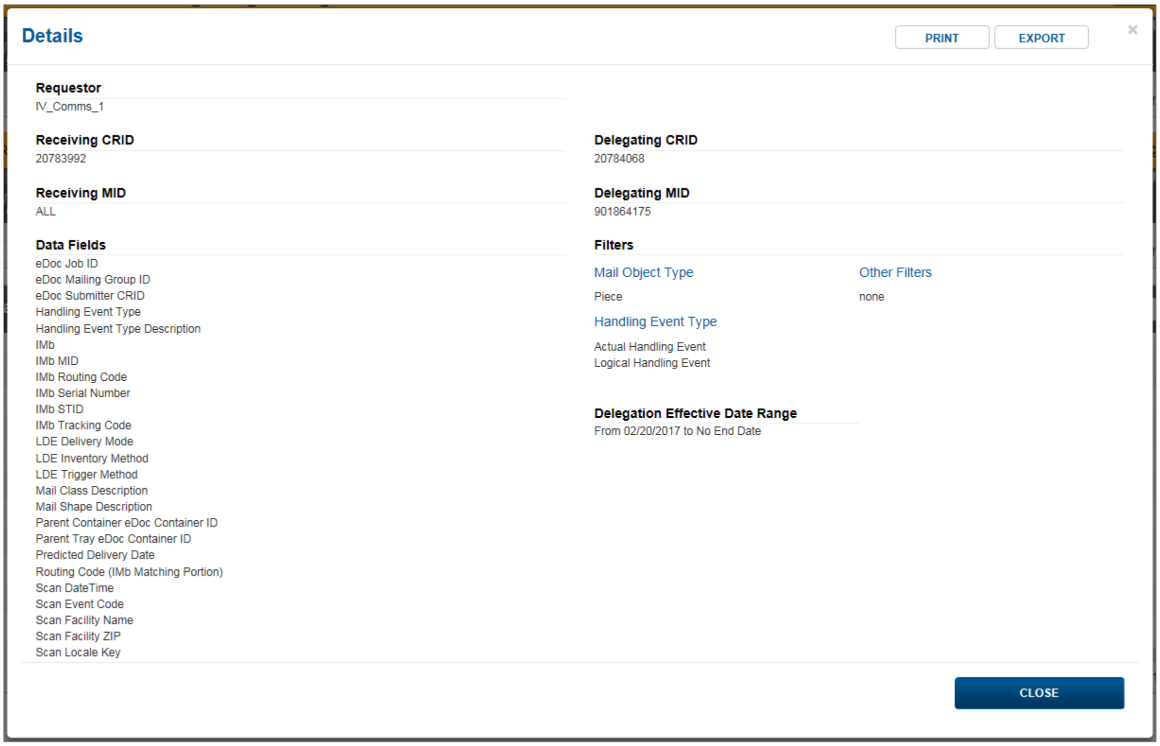
RECEIVING CRID	RECEIVING COMPANY	RECEIVI... MID	MAIL OBJECT TYPE	REQUESTO...	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
20784068	CENTRAL C...	901864175	Handling Unit	IV MT migratio...	20783992	XYZ COMPANY	901864159	08/08/2017	11/14/2016 t...	Request Approved	
20784068	CENTRAL C...	ALL	Bundle	IV_Comms_1	20783992	XYZ COMPANY	ALL	04/17/2017	04/16/2017 t...	Request Approved	
20784068	CENTRAL C...	ALL	Piece	IV_Comms_1	20783992	XYZ COMPANY	ALL	04/17/2017	04/16/2017 t...	Request Approved	
20784068	CENTRAL C...	901864175	Container	IV MT migratio...	20783992	XYZ COMPANY	901864159	08/08/2017	11/14/2016 t...	Request Approved	
22433130	MAGICAL M...	ALL	Handling Unit	IV_CommsTest...	20783992	XYZ COMPANY	901872596	04/11/2017	04/10/2017 t...	Request Cancelled	
20784068	CENTRAL C...	ALL	Container	IV_Comms_PR...	20783992	XYZ COMPANY	ALL	02/23/2017	02/22/2017 t...	Request Cancelled	
20784068	CENTRAL C...	ALL	Bundle	IV_Comms_PR...	20783992	XYZ COMPANY	ALL	02/23/2017	02/22/2017 t...	Request Cancelled	

1 / 3 10 items per page 1 - 11 of 28 items

In this section:

- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To export the authorization history table, click the export  icon. A pop-up window appears. Select **CSV**, **XLSX**, or **XLS**, and then click **Export**.

- To view additional information for an approved request, click the details icon in the **Details** column for that request or rule. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the request.



In the window:

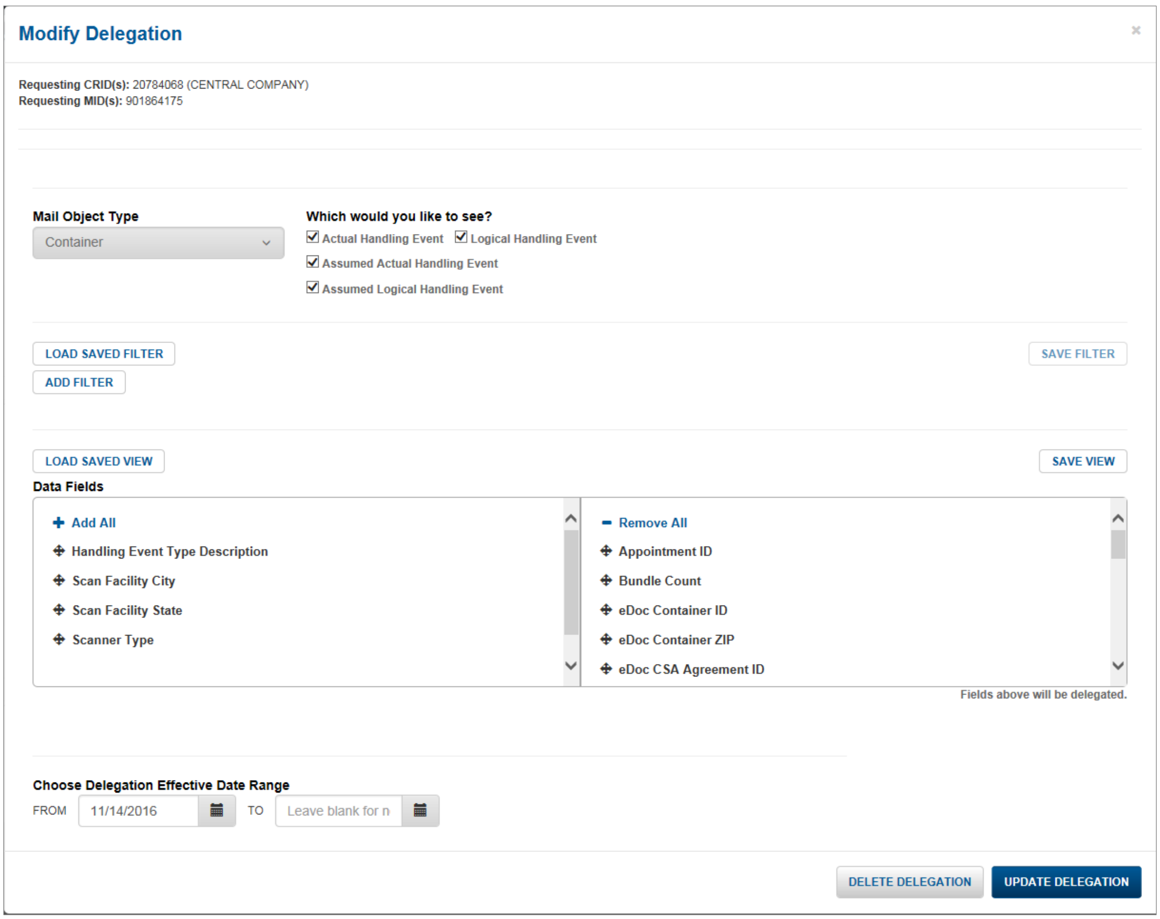
- To print the window, click **Print**.
- To export the window as a PDF document, click **Export**.
- To close the window, click **Close** OR click the **X** icon.

9.2.2.1 Modify an Existing Data Delegation Rule

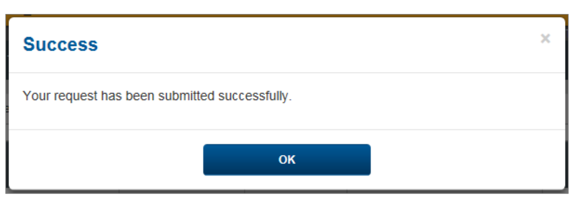
To modify an existing data delegation rule:

1. Click the modify icon in the **Details** column for the rule. The Modify Delegation window opens.
2. In the window, make any necessary changes. You can change the handling event type(s), add filters, select data fields, and choose the effective date range.

   Note: For information about using a saved filter or view to modify data delegation, see Section 12: *Notifications*.



3. When finished, click **Update Delegation**. A window appears informing you the application has updated the data delegation rule.



4. To close the window, click **OK** OR click the **X** icon.

9.2.2.2 Delete an Existing Data Delegation Rule

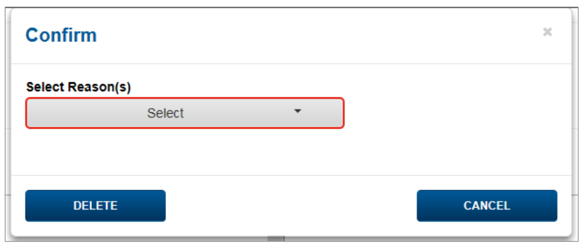
Important:

- Delegators can delete any delegation at any time, for any reason. Once a deletion is made, the change will be reflected in the data within about 15 minutes.

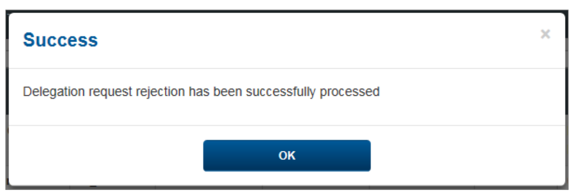
To delete an existing data delegation rule:

1. Click the modify  icon in the **Details** column for the rule. The Modify Delegation window opens.
2. At the bottom of the window, click **Delete Delegation**. A window appears.

3. In the window, select one or more reasons for deleting the rule.



4. Click **Delete**. A window appears confirming the application has deleted the delegation successfully.



5. To close the window, click **OK** OR click the **X** icon.

9.3 Delegate Data to Others

Important:

- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can access this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation's creation or effective date. For example, if a data delegation rule was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party's handling events from 11/15/2017.
- Data delegation rules only provide visibility for the data types available for delegation at the time of the request. If a new data type becomes available, the Receiving party will need submit a new data delegation request to receive that data type.

On this tab, you can create a data delegation rule to provide visibility of your CRID to another CRID or MID. (Alternatively, the Receiving CRID could submit a request to receive visibility, as explained in Section 9.1.1: *Request Data Delegation*. The Delegating CRID would then approve the request, as explained in Section 9.2.1: *Data Delegation Requests Pending Approval*.)

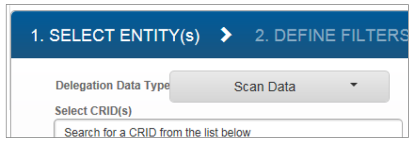
The general steps for creating a data delegation rule to provide visibility of your CRID or MID to another CRID or MID are as follows:

1. In the Select Entity(s) section of the page, select the CRID(s) or MID(s) to provide visibility of.
2. When finished, click **Next Step**.
3. On the Define Filters & Fields screen, select the mail object type(s) and handling event type(s) for which to provide visibility. You may also set filters and select data fields (if applicable).
4. When finished, click **Next Step**.
5. On the Select Recipient(s) screen, search for and add the CRID(s) or MID(s) who should receive visibility.
6. When finished, click **Submit Request**.
7. Review your selections, and click **Confirm**. The application creates the data delegation rule created.

See the following sections for additional information. For information about using a saved filter or view to delegate data to others, see Section 12: *Notifications*.

9.3.1 Select Entity(s)

On this screen, begin by selecting the data type for the delegation.



Then, select the CRID(s) or MID(s) whose data you want to provide visibility of. You may do this two ways. The following sections provide instructions for each option:

- **Option 1:** Select CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

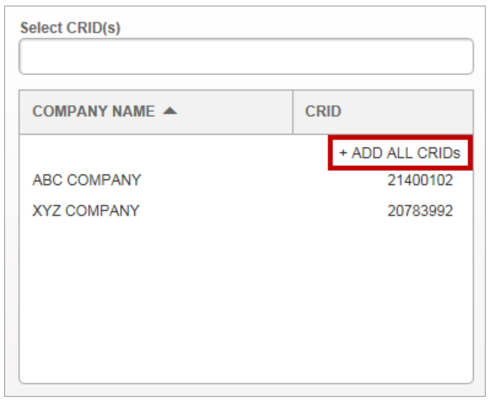
9.3.1.1 Option 1: Select CRID(s), then MID(s)

By default, the **Select CRID(s)** section displays the CRIDs for which you have the ability to create a delegation rule.

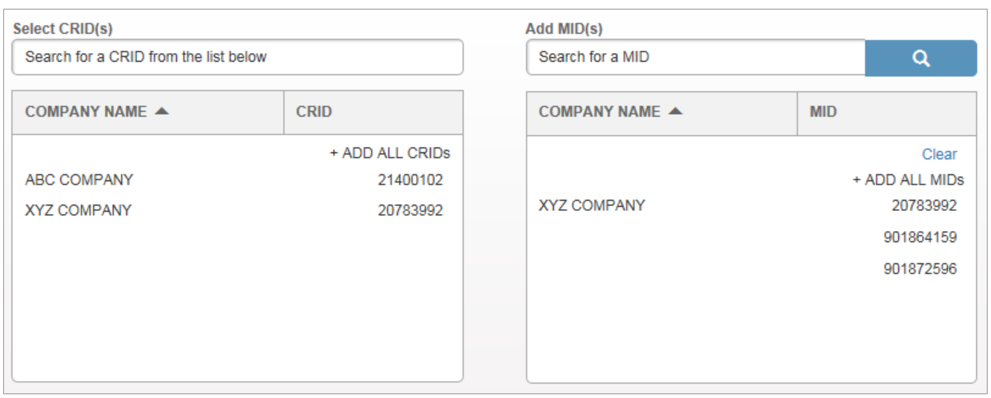
To filter this list for a specific CRID, begin typing the CRID name or number in the search box. As you type, the list displays the CRID names or numbers matching the entered text.

To select a *single* CRID, hover on the CRID number and click **Show MIDs**.

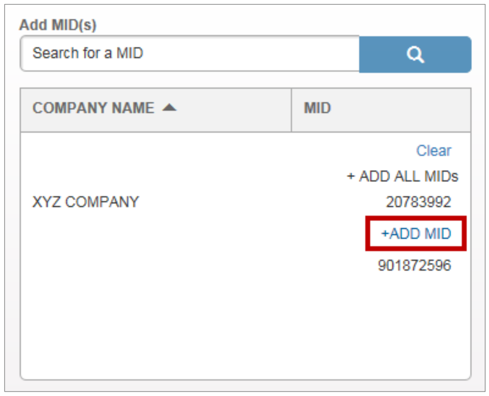
To select *all* CRIDs, click **Add All CRIDs**.



The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.

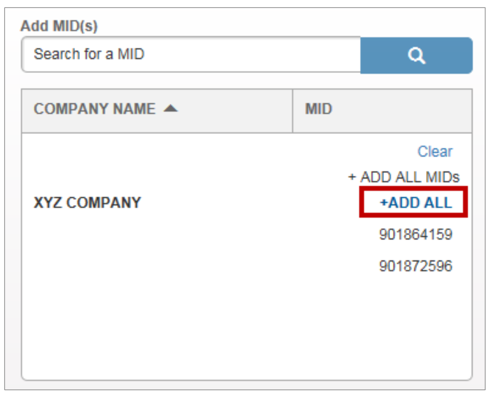


From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.



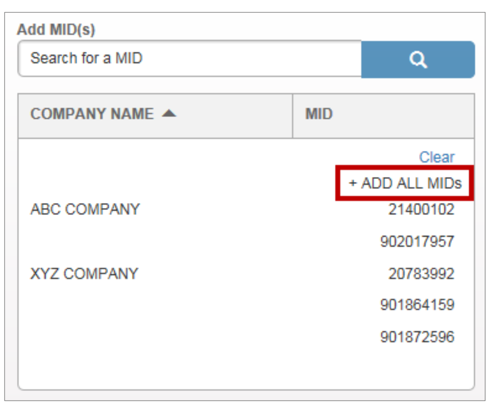
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs** at the top of the list.

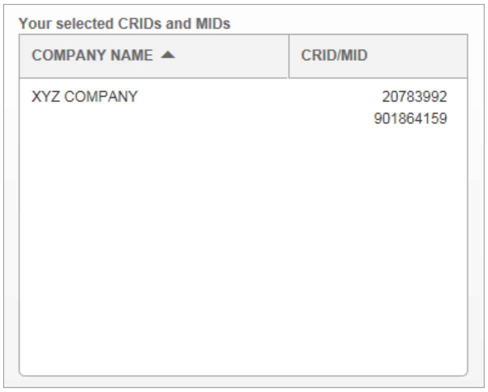
Important: This creates a CRID-level delegation rule for each CRID. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

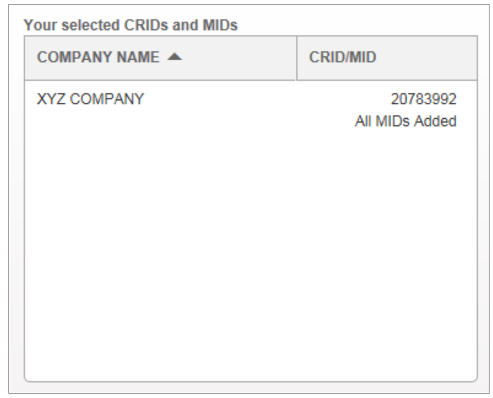


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





Repeat the steps above to add additional CRIDs or MIDs as desired.

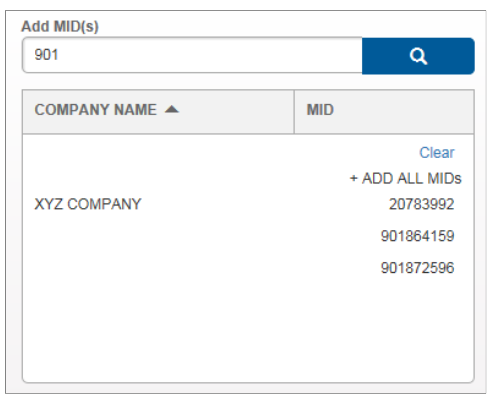
When you are finished, click **Next Step**.

9.3.1.2 Option 2: Directly Add MID(s)

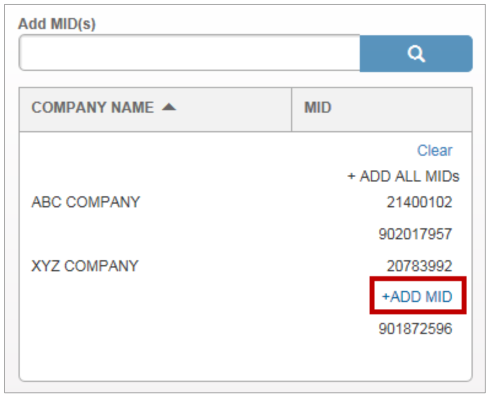
By default, the **Add MID(s)** section does **not** display all of the MIDs belonging to the CRIDs for which you have the ability to create a delegation rule.

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs belonging to a CRID for which you have the ability to create a delegation rule appear based on the search criteria.

Note: The CRID number appears above the MID number(s), to the right of the company name.

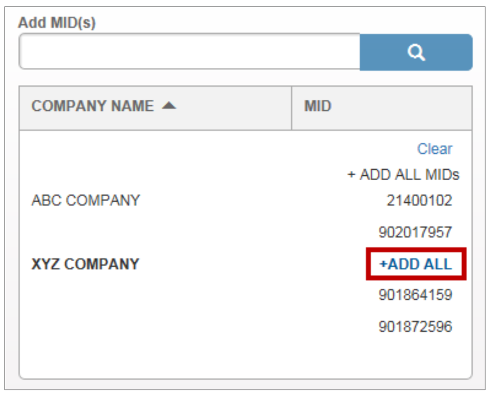


To add a *single* MID, hover on the MID number and click **Add MID**.



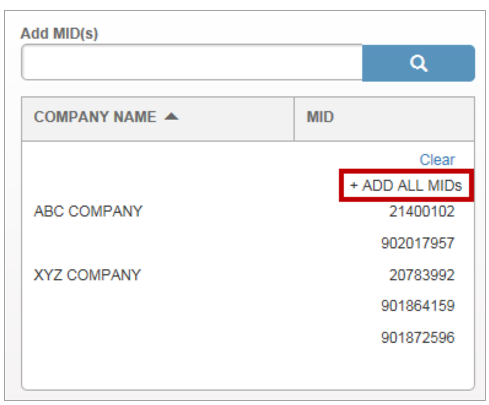
To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

Important: Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility of all MIDs belonging to the CRID now or added to that CRID in the future.



To add *all* of the MIDs for *all* of the CRIDs, click **Add All MIDs**.

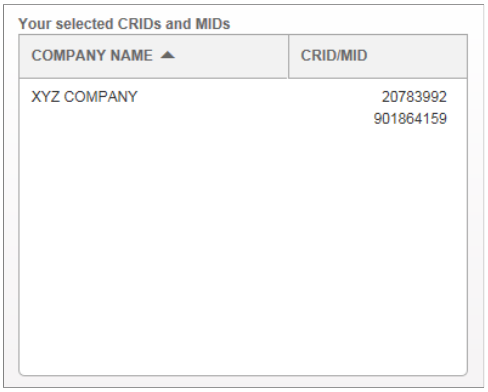
Important: This creates a CRID-level delegation rule for each CRID. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

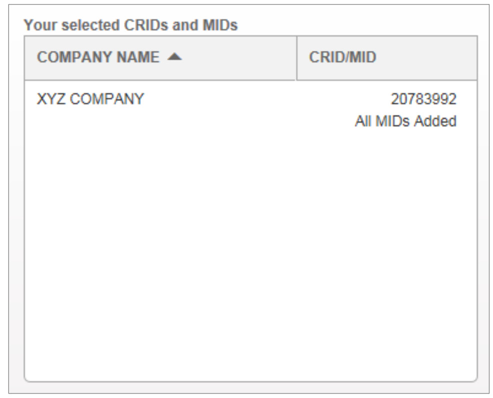


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Select CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All** or **Add All MIDs**, this section specifies that all MIDs were added.





Repeat the steps above to add additional MIDs as desired.

When you are finished, click **Next Step**.

9.3.2 Define Filters & Fields

The Define Filters & Fields screen has additional options for you to customize the delegation rule. The following table describes the functions of each area of the screen.

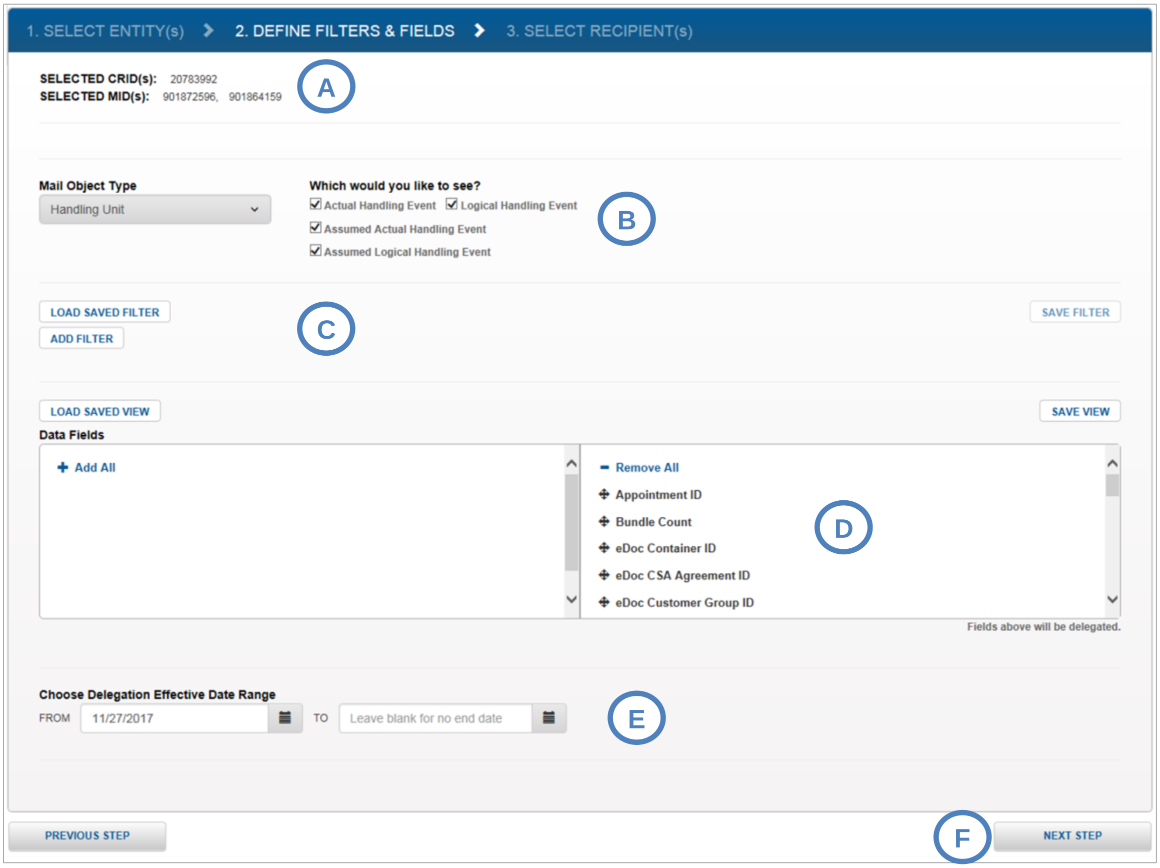


Table 9.2: Delegate Data to Others Define Filters & Fields Screen Functions

Screen Area	Description
A	View the CRID(s) or MID(s) selected for the delegation rule
B	Select the mail object type and handling event type(s) to provide visibility of
C	Add filters to refine the delegation rule (optional) **Note:** If you selected "All" for **Mail Object Type**, filters are not available.
D	Select the data fields to provide visibility of **Note:** If you selected “All” for **Mail Object Type**, the application includes all available data fields for all mail object types in the delegation rule.
E	Choose the date range for the delegation to be active
F	Click **Next Step** to go to the Select Recipient(s) screen

For additional information about the options on this screen, see the following sections.

9.3.2.1 View Selected Entity(s)

This area displays the CRID(s) or MID(s) of which you are providing visibility.

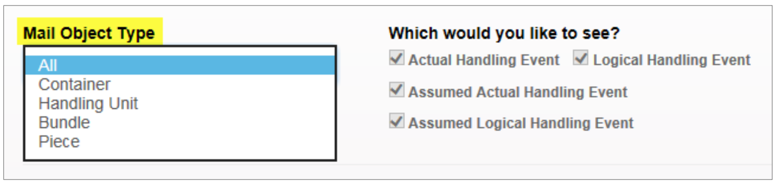
9.3.2.2 Select Mail Object and Handling Event Type(s)

Important: At this time, you can only select one mail object type OR select **All** to include all four mail object types. To provide visibility of more than one mail object type *but not all mail object types*, you must create a separate data delegation rule for each additional mail object type.

In this area, select the mail object type and handling event type(s) for which you would like to provide visibility.

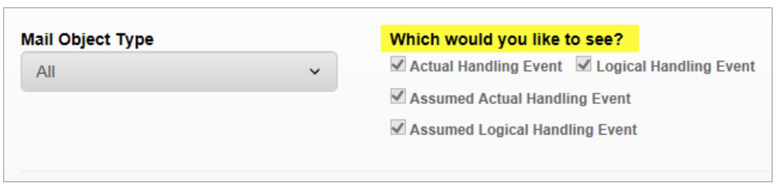
To select the mail object type, make a selection from the **Mail Object Type** drop-down menu.

Note: Selecting **All** includes all four mail object types.



To select the handling event type(s), check the box for the desired handling event type(s) under **Which would you like to see?**. You may select more than one handling event type.

Note: Logical, assumed actual, and assumed logical handling events may not be available at this time for all mail object types. However, you may provide visibility now in anticipation of all handling event types being available for all mail object types in a future release.



9.3.2.3 Add Filter(s)

Note: Filters are only available if you selected one mail object type. At this time, you cannot add a filter to a data delegation rule if you selected **All** for **Mail Object Type**.

In this area, you may add filters to limit the data for which you are providing visibility. To add a filter:

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.

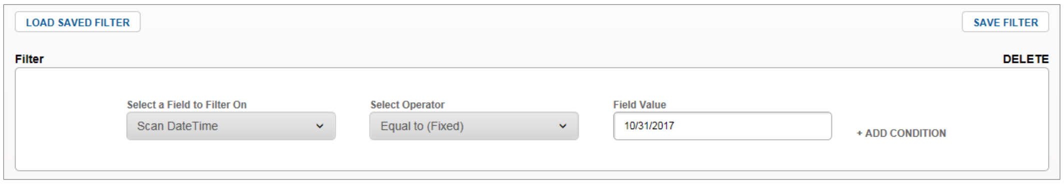
   Note: The fields available depend on the mail object type selected.
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.

   Note:

   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.

- The **Between** operator is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.

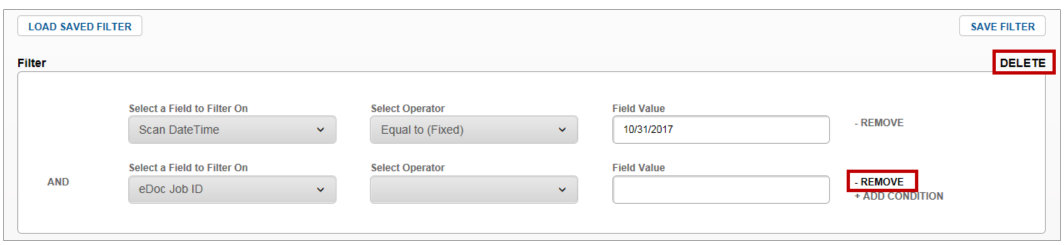
4. In the **Field Value** field, enter the filter criteria value.



Note: The *One of* and *Not One of* operators allow multiple field values. Separate values by commas without a space (e.g., 123456,123457,123458).

To add an additional filter, click **Add Condition**. A second filter section appears. Follow steps 2-4 above to select the filter options.

To remove all filters, click **Delete** in the upper-right corner of the filter section. To remove one filter, click **Remove** to the right of the filter you wish to remove.



For information about using a saved filter, see Section 13.2: *Saved Filter*.

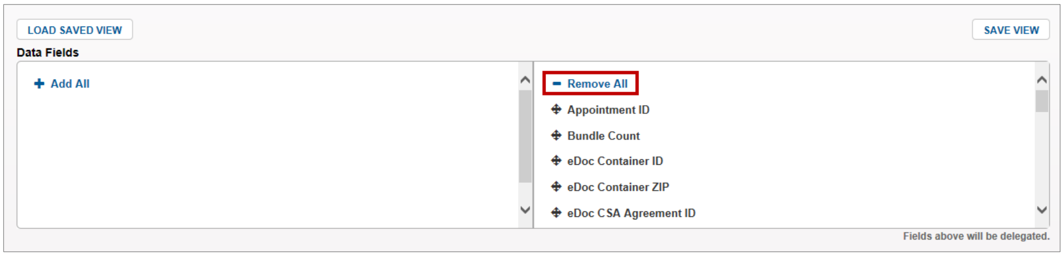
9.3.2.4 Select Data Fields

Note:

- You may only select data fields if you selected one mail object type. If you selected **All** for **Mail Object Type**, all available data fields for all mail object types are included in the data delegation rule.
- You can drag to reorder data fields in this section; however, the order of data fields in a data delegation rule has no impact on visibility or the way those data fields will display in results for a one-time query or data feed. For a one-time query or data feed, the display order of fields is selected when creating the query or feed.
- For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.

In this area, select the data fields for which you would like to provide visibility. The available data fields vary based on the selected mail object type. By default, all data fields for the selected mail object type are selected.

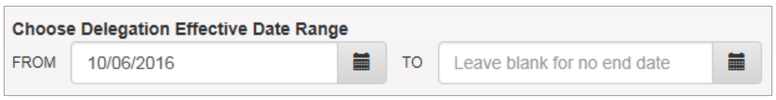
To remove a data field, drag it from the right side to the left side OR double-click the field name on the right side. To remove all of the data fields, click **Remove All** at the top of the list.



For information about using a saved view, see Section 13.3: *Saved View*.

9.3.2.5 Choose Effective Date Range

Choose the date range by typing in the **From** and **To** fields OR clicking the calendar icons and selecting the dates. This is the date range for the data delegation rule to be active.



Note:

- By default, the **From** date is set as today's date. However, you may select any date in the future.
- You may leave the **To** date blank for no end date.

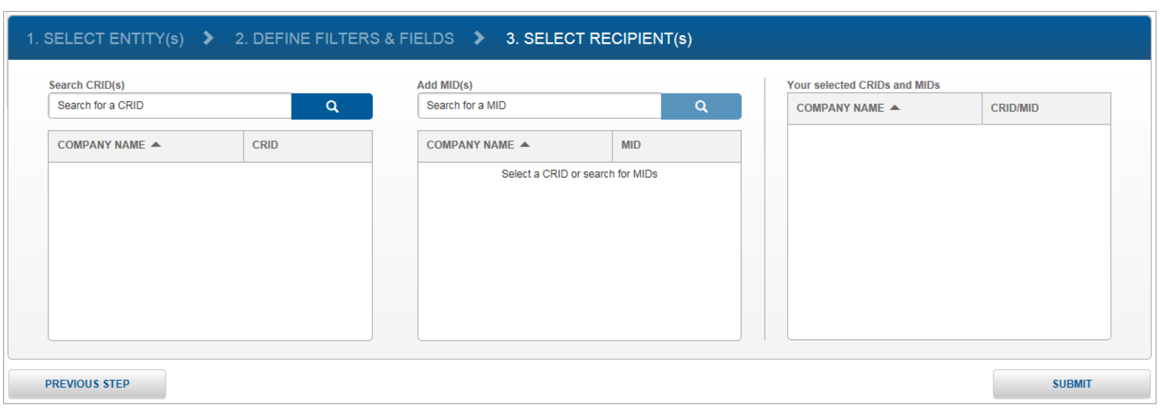
9.3.2.6 Go to Next Step

When you are finished on this screen, click **Next Step**.

9.3.3 Select Recipient(s)

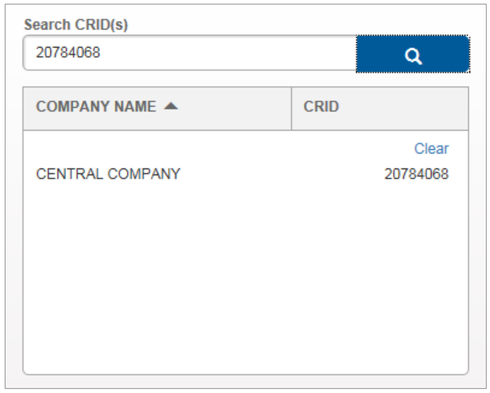
On this screen, search for and add the CRID(s) or MID(s) which you want to receive visibility of the delegated data. You may do this two ways. The following sections provide instructions for each option:

- **Option 1:** Search for CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

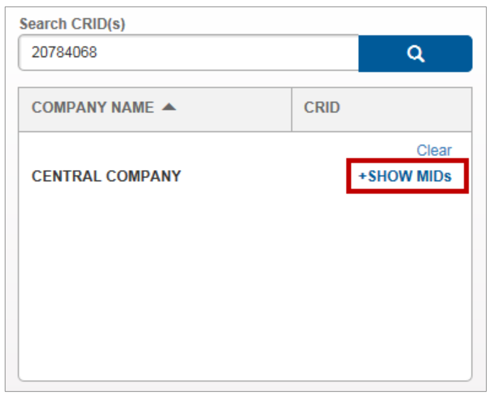


9.3.3.1 Option 1: Search for CRID(s), then Add MID(s)

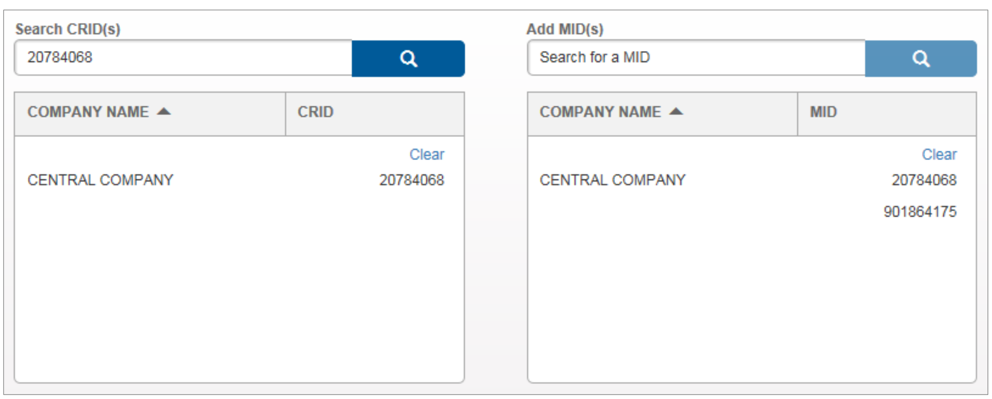
To search for a CRID, type three or more characters from the CRID number into the search box and click the search button or press **Enter**. CRIDs appear based on the search criteria.



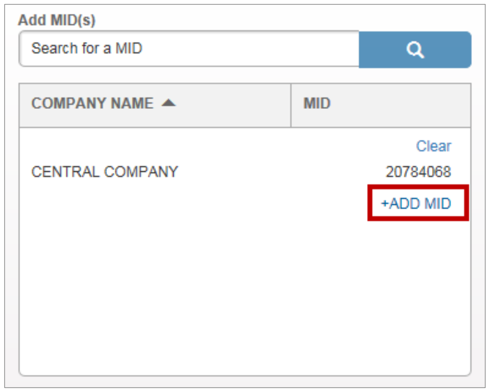
To select a *single* CRID, hover on the CRID number and click **Show MIDs**.



The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.

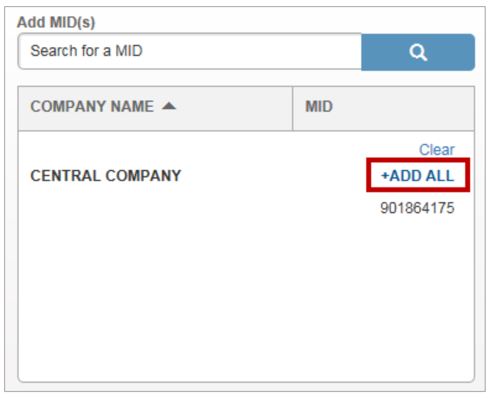


From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.



To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

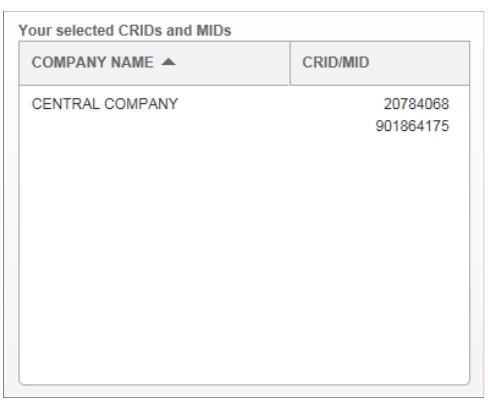
Important: Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility to any MIDs belonging to the CRID now or added to that CRID in the future.



The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Search CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All**, this section specifies that all MIDs were added.



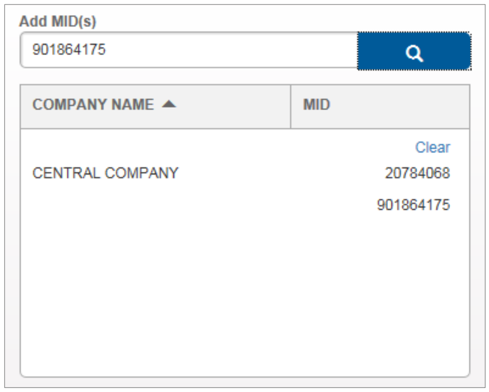
Repeat the steps above to add additional CRIDs or MIDs as desired.

When you are finished, continue to submit the form to create the delegation rule.

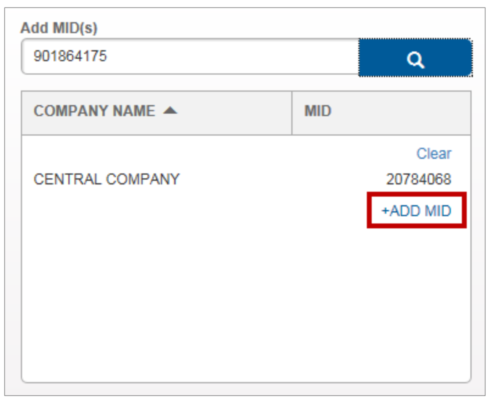
9.3.3.2 Option 2: Directly Add MID(s)

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs appear based on the search criteria.

Note: The CRID number appears above the MID number(s), to the right of the company name.

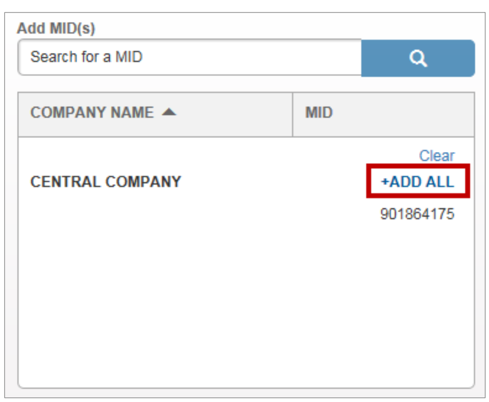


To add a *single* MID, hover on the MID number and click **Add MID**.



To add *all* of the MIDs for a *single* CRID, hover on the CRID number and click **Add All**.

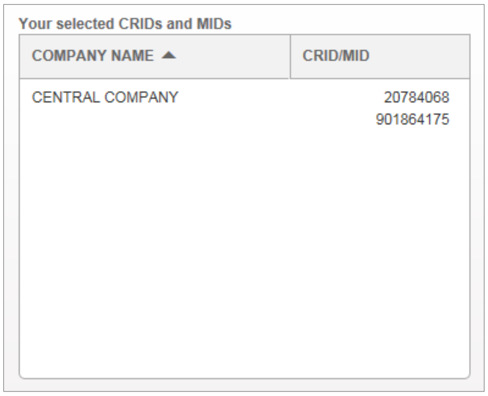
> **Important:** Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility to any MIDs belonging to the CRID now or added to that CRID in the future.

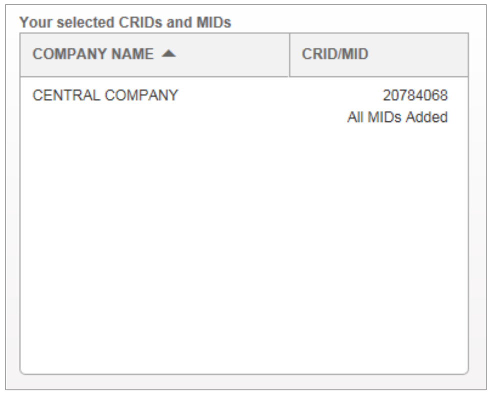


The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

Note:

- Selected CRIDs and MIDs do not appear in the **Search CRID(s)** and **Add MID(s)** sections.
- If you clicked **Add All**, this section specifies that all MIDs were added.





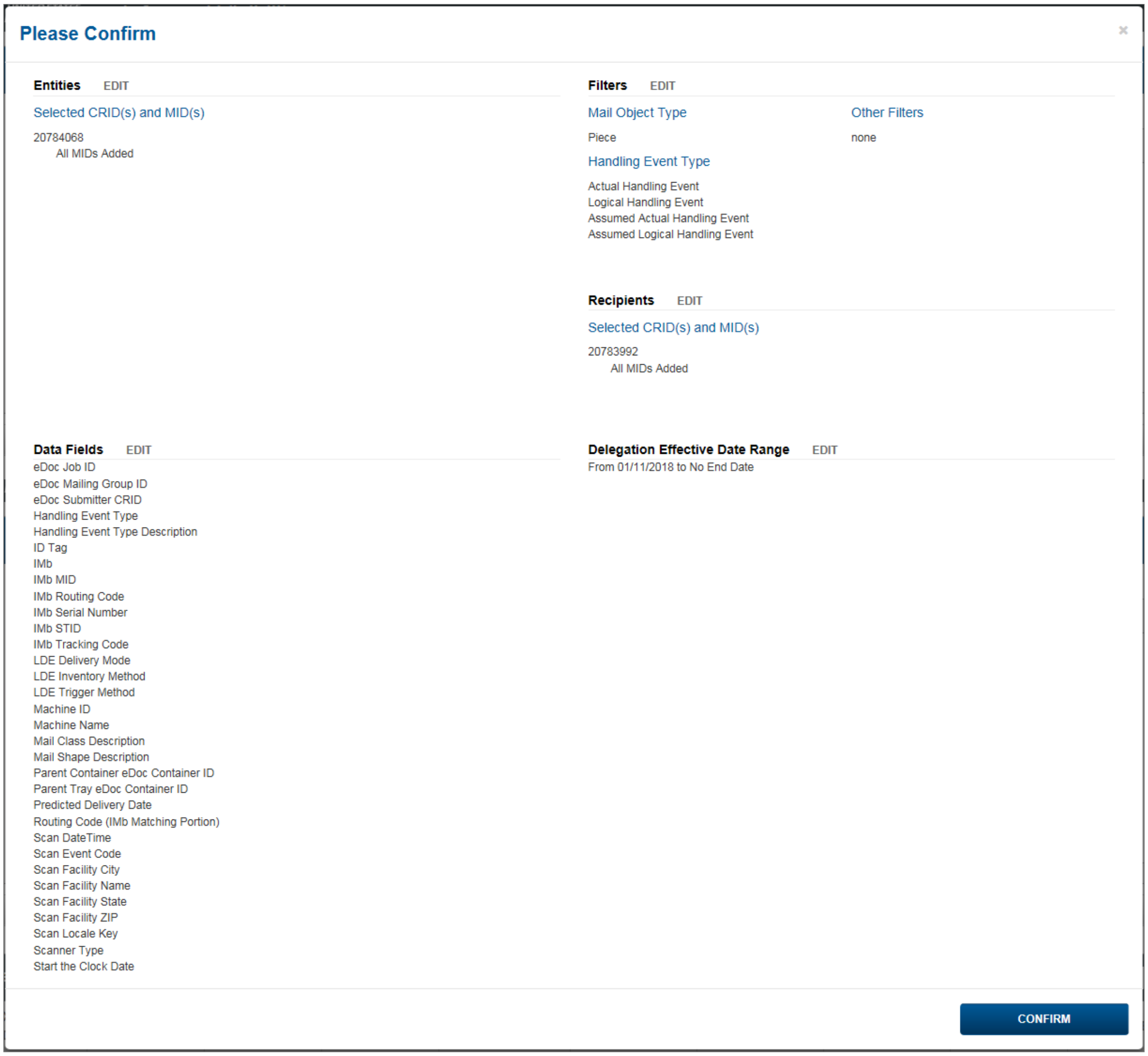
Repeat the steps above to add additional MIDs as desired.

When you are finished, continue to submit the form to create the delegation rule.

9.3.4 Submit

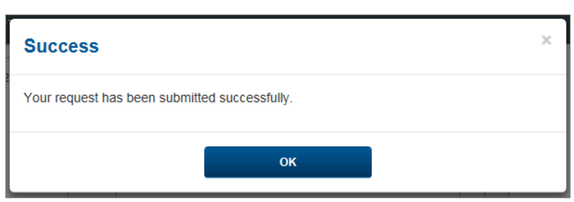
When you are ready to create the data delegation rule, click **Submit**.

A window appears for you to review your selections. To make any changes, click **Edit** in the appropriate section.



When finished, click **Confirm**. A window appears informing you the application has created the data delegation rule.

To close the window, click **OK** OR click the **X** icon.

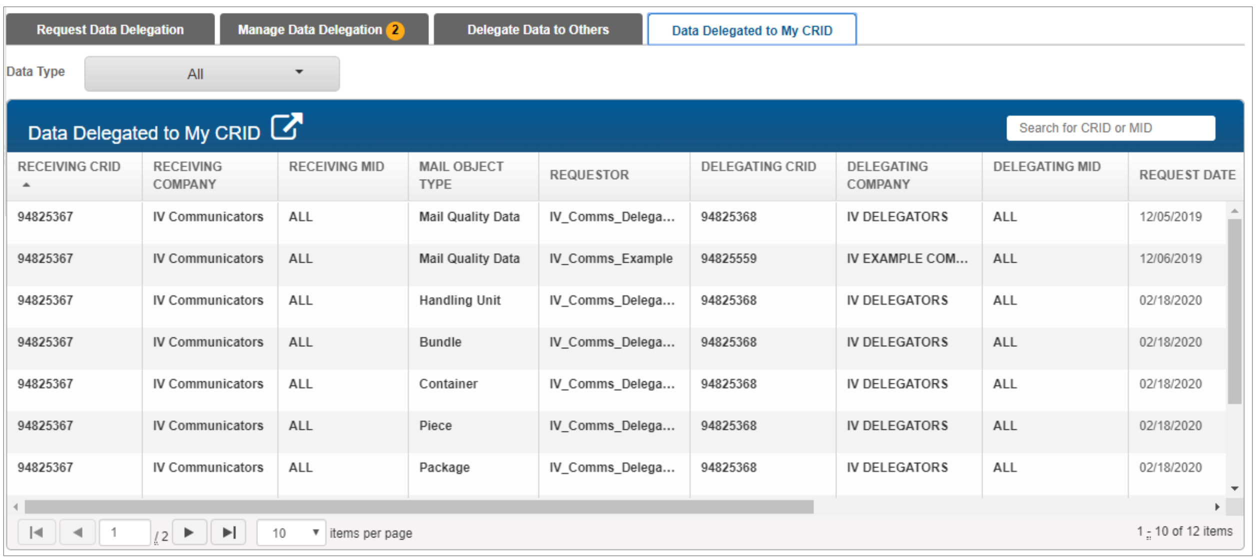


9.4 Data Delegated to My CRID

Important:

- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can delete an existing data delegation rule on this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation's creation or effective date. For example, if a data delegation rule was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party's handling events from 11/15/2017.
- Data delegation rules only provide visibility for the data types available for delegation at the time of the request. If a new data type becomes available, the Receiving party will need submit a new data delegation request to receive that data type.
- 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. For information, see Section 12.4: *Managing Notification Preferences*.

On this tab, you are able to see active data delegation rules providing your CRID or MID with visibility of another CRID or MID. If you are an IV-MTR BSA, BSA Delegate, or Data Delegation Manager, you can also delete an existing data delegation rule so your CRID or MID no longer has visibility of a particular Delegated CRID or MID.

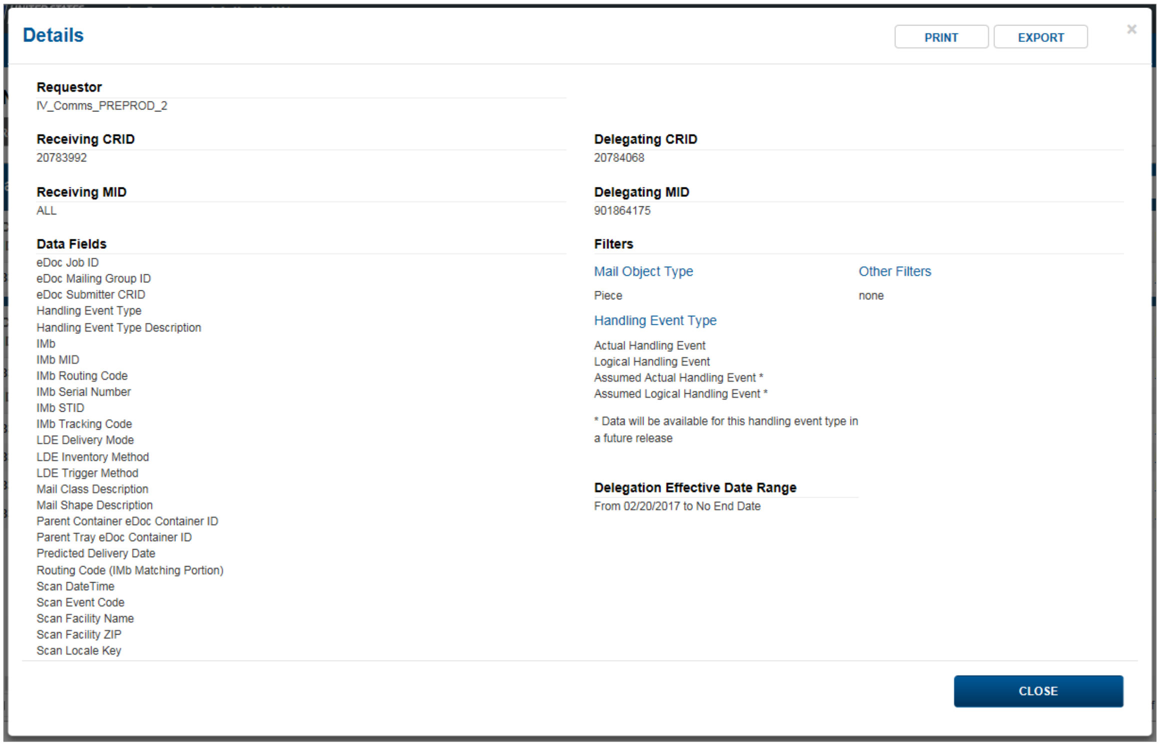


RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE
94825367	IV Communicators	ALL	Mail Quality Data	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	12/05/2019
94825367	IV Communicators	ALL	Mail Quality Data	IV_Comms_Example	94825559	IV EXAMPLE COM...	ALL	12/06/2019
94825367	IV Communicators	ALL	Handling Unit	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020
94825367	IV Communicators	ALL	Bundle	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020
94825367	IV Communicators	ALL	Container	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020
94825367	IV Communicators	ALL	Piece	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020
94825367	IV Communicators	ALL	Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020

On this tab:

- Use the Data Type drop down menu to select a type of records to review.
  – If you have less than 50,000 data delegation records, all records will be displayed by default
- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To export the delegation table, click the export icon. A pop-up window appears. Select **CSV**, **XLSX**, or **XLS**, and then click **Export**.

- To view additional information for a rule, click the details icon in the **Details** column for that rule. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the rule.



In the window:

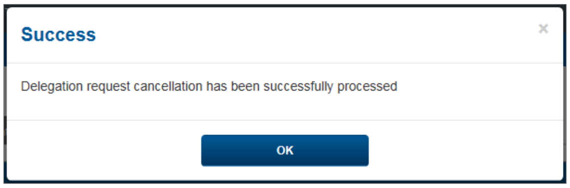
- To print the window, click **Print**.
- To export the window as a PDF document, click **Export**.
- To close the window, click **Close** OR click the **X** icon.

Important: When deleting a data delegation rule, the change will be reflected in the data within about 15 minutes.

To delete an existing data delegation rule:

1. Click the delete icon in the **Details** column for the rule. A window appears informing you that you will not be able to view data for the Delegated CRID or MID after removing the delegation rule.
2. To delete the data delegation rule, click **Delete**.

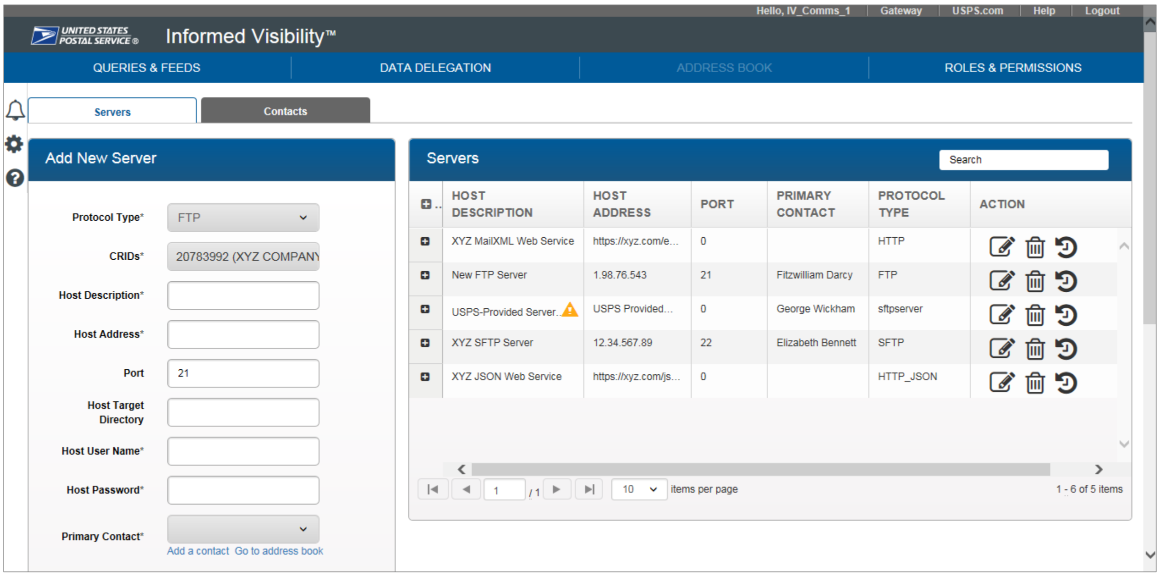
3. A window appears informing you the application has deleted the data delegation rule.



4. To close the window, click **OK** OR click the **X** icon.

10 Address Book

In the address book, you can save server locations and people's contact information for use within the application. To access these functions, click **Address Book** in the top navigation bar.



Address book entries "belong to" a CRID and are shared by that CRID's users. When an address book entry belongs to a CRID, certain users for that CRID are able to modify or delete the entry. In the application, you can see address book entries belonging to CRIDs for which you have the IV-MTR service. However, you **cannot** see address book entries belonging to other CRIDs, even if those CRIDs have delegated visibility to your CRID. For example:

- If a user only has the IV-MTR service for CRID A, the user can only see address book entries belonging to CRID A.
- If CRID B delegated visibility to CRID A, the CRID A user **would not** see any address book entries created by CRID B.

See the following sections for additional information about viewing and managing the address book.

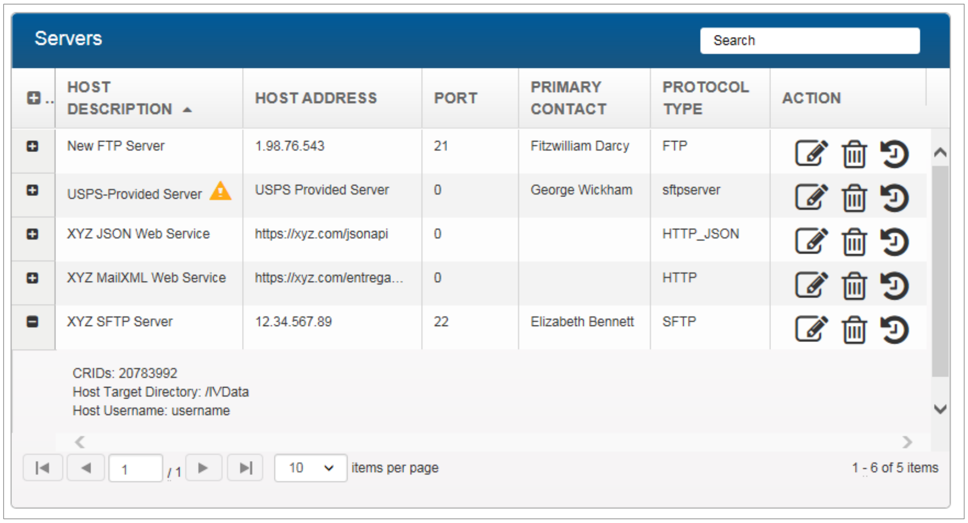
10.1 View and Add Servers

To view and manage server locations, click the **Servers** tab. The application supports SFTP servers, Secure Hyper-Text Transmission Protocol (HTTPS) Mail.xml web services, and HTTPS JSON web services.

Note: Each address book entry belongs to a CRID and is shared by that CRID's users. Throughout the application, you see server and contact address book entries belonging to CRIDs for which you have the IV-MTR service.

10.1.1 Your Servers

The **Servers** table on the right side of the page displays the servers and web services already in your CRID address book(s).



In this table:

- Search by entering text in the search box (as you enter text, the servers filter to display those matching your entry).
- To see additional information for an entry, click the **+** icon to the left of the server name.
- To modify an entry, click the modify icon. (**Note:** Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)
- To delete an entry, click the delete icon. (**Note:** Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)
- To view the change history for an entry, click the view change history icon.
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

Important: If you remove a server that is receiving data for a data feed, that feed will no longer send data to the server. To continue receiving data, modify the data feed to use a different server.

10.1.2 Add New Server

Important: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.

To add a new server, complete the **Add New Server** section on the left side of the page:

1. From the **Protocol Type** drop-down menu, select **SFTP**, **HTTPS Mail.xml**, or **HTTPS JSON**. The remaining fields change based on this selection. See the following sections for additional information for each protocol type.
2. From the **CRIDs** drop-down menu, select the CRID(s) whose address book(s) you want to add the server to.

3. Complete the remaining fields.
4. When you are finished, click **Add to Address Book**. The server or web service is added to the address book(s) for the selected CRID(s) and appears under the **Servers** section on the right side of the page.

10.1.2.1 Secure File Transfer Protocol (SFTP) Server

Important: If you would like to use SFTP to receive data from IV-MTR, you must add the application-specific IP addresses to your server firewall to ensure your system can receive data from the application's servers. Please contact the IV Solutions Center to receive the IP addresses to be added.

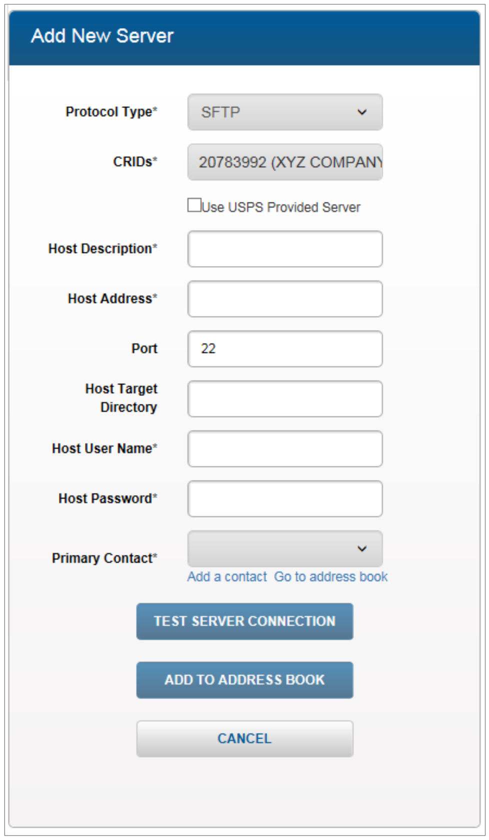
If you chose SFTP as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click **Add to Address Book**.

Note:

- You may enter the **Host Address** as an IP address or URL.
- By default, **Port** is set to 22, which is the application's standard for SFTP. If you enter a number other than 22, the application prompts you to contact the IV Solutions Center to request use of a non-standard port. For additional information, see Section 10.1.3.1: *Non-Standard Port*.
- With the SFTP protocol, you can choose to have the application send files to a USPS-provided server, from which you can then pull the files. To use this method, select **Use USPS Provided Server**. For additional information about using this method, see Section 10.1.3.2: *USPS-Provided Server*.

- The **Primary Contact** field is required so the Application Team has a point of contact if there is a problem communicating with the server. Select a contact from the drop-down list. **Note:** If the selected contact does not have a phone number, the application prompts you to enter one.

  To add a contact, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your contacts.



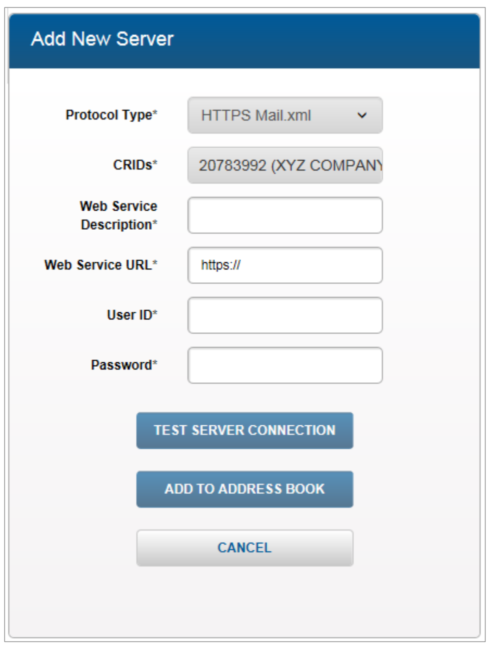
After completing all of the fields, you can send a test message from the application to the server by clicking **Test Server Connection**. Follow the prompts to test the server connection and add the server to your address book.

10.1.2.2 HTTPS Mail.xml Web Service

Important:

- To use Mail.XML **push or pull** messages to obtain mail tracking data, you must download and install the appropriate Web Services Description Language (WSDL) file. A WSDL file automates the details involved in communication between applications for using Mail.XML messages.
- The WSDL files are available on the IV-MTR PostalPro page. The appropriate WSDL file to use depends on whether you are using push or pull messages, and for push messages, the version of Mail.XML used. You must install the appropriate WSDL file(s) to be able to receive data from the application.
- To use Mail.XML **pull** messages to obtain mail tracking data, you must also download and install the IV-MTR Secure Sockets Layer (SSL) certificate. The SSL certificate enables secure communication to the IV-MTR web application. The SSL certificate is available on the IV-MTR PostalPro page. You must install the certificate to be able to receive data from the application.
- For additional information, see the *IV-MTR Mail.XML Guide*.

If you chose HTTPS Mail.xml as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click **Add to Address Book**.



After completing all of the fields, you can send a test message from the application to the web service by doing the following:

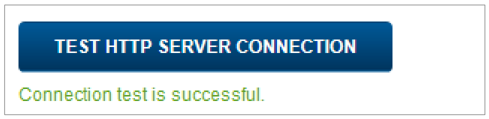
1. Click **Test Server Connection**. A window opens.
2. From the **Message Type** drop-down menu, select which message type to use for the test message.

3. From the **Message Version** drop-down menu, select the Mail.XML version that the application should send the test message in.

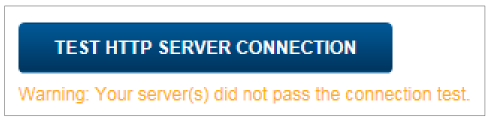
   Note: IV-MTR currently supports Mail.XML versions 12.0A, 12.0B, 14.0A, and 16.0 for all messages. For Start-the-Clock messages, IV-MTR supports these versions as well as version 21.0.

4. Click **Test HTTP Server Connection**.

   If the test is successful, a message displays confirming the test was successful. To close the window, click **OK**, click **Cancel**, OR click the **X** icon.

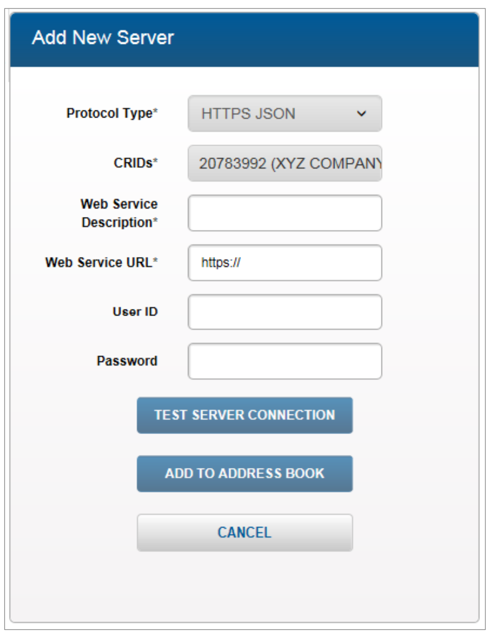


   If the test is not successful, a warning message appears. To close the window, click **OK**, click **Cancel**, OR click the **X** icon. Modify the settings for the web service and retest or contact the IV Solutions Center for additional assistance.



10.1.2.3 HTTPS JSON Web Service

If you chose HTTPS JSON as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click **Add to Address Book**.



After completing all of the fields, you can send a test message from the application to the server by clicking **Test Server Connection**. Follow the prompts to test the server connection and add the server to your address book.

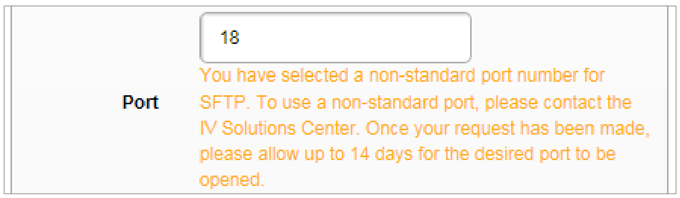
10.1.3 Special SFTP Scenarios

Important: If you would like to use SFTP to receive data from the application, you must add the application-specific IP addresses to your server firewall to ensure your system can receive data from the application's servers. Please contact the IV Solutions Center to receive the IP addresses to be added.

Use of a non-standard port for an SFTP server and use of the USPS-provided server are special scenarios. The following sections provide additional information about these special scenarios.

10.1.3.1 Non-Standard Port

The application's standard port is 22 for SFTP. If you enter a non-standard port number in the **Port** field, the application prompts you to contact the IV Solutions Center to request use of a non-standard port.

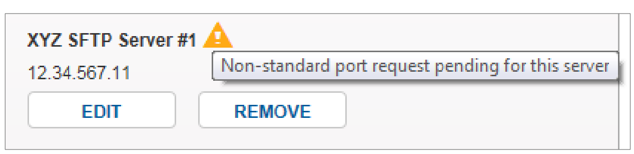


When you contact the IV Solutions Center, provide the following information:

- Server host address (if provided as a URL, provide all IP addresses the URL could resolve to)
- Port number requested to be used
- Company name
- Technical Point of Contact (POC) name (someone who can discuss connectivity, network, and other technical information about the server)
- Technical POC contact information
  - Address, city, state, ZIP
  - Phone number
  - Email address

The IV Solutions Center will collect this information and submit a request for use of a non-standard port. Please allow up to 21 days for the desired port to be opened. The application will not send mail tracking data to the server until the request is approved and the port configured.

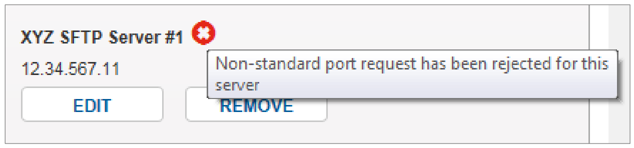
While the request is pending approval, a warning icon appears next to that server name throughout the application. Hover on the icon to display the reason for the warning.



The IV Solutions Center will let you know when the request has been approved or rejected.

- If approved, the warning icon no longer displays next to the server name throughout the application.
- If rejected, a red icon displays next to the server name. Hover on the icon to display the reason.

  If your request is rejected, you can use the standard port OR enter another non-standard port and contact the IV Solutions Center to submit a request for approval to use that port.



Note:

- If your request is approved, any other existing servers with the same **Host Address** and **Port** combination are also approved. Any new servers added with the same Host Address and Port combination are automatically approved.
- If your request is rejected, any other existing servers with the same Host Address and Port combination are also rejected. However, any new servers added with the same Host Address and Port combination are **not** automatically rejected.

10.1.3.2 USPS-Provided Server

With the SFTP protocol, you can choose to have the application send files to a USPS-provided server, from which you can then pull the files. To use this method, you must 1) work with the IV Solutions Center to receive an account to use this server and 2) add the USPS-provided server to your application address book.

First, contact the IV Solutions Center to request an account for the USPS-provided server. You will need to provide the following information:

- IP addresses that will be used to pull files from the USPS-provided server
- Company name
- Technical POC name (someone who can discuss connectivity, network, and other technical information)
- Technical POC contact information
  - Address, city, state, ZIP
  - Phone number
  - Email address

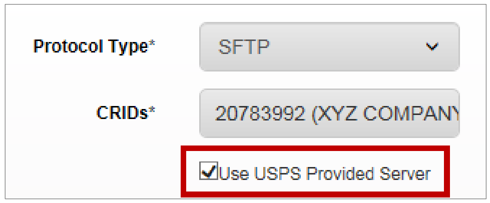
The IV Solutions Center will collect this information and submit a request for your company to use the USPS-provided server. Please allow up to 21 days for account setup.

When account setup is complete, USPS Data Transfer Services (DTS) Operations will provide the technical POC with the account username via email and the password via phone. Once you have this information, add the server to your address book with the provided account credentials.

To add the USPS-provided server as a new entry in your address book:

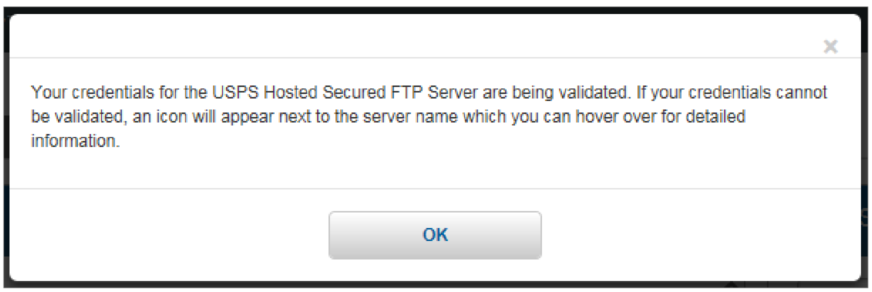
1. Go to **Address Book** > **Servers** > **Add New Server**.
2. From the **Protocol Type** drop-down menu, select **SFTP**.
3. From the **CRIDs** drop-down menu, select the CRID(s) to whose address book you want to add the server.

4. Select **Use USPS Provided Server**.



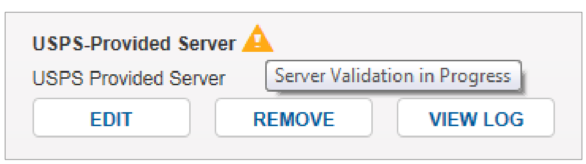
5. In the **Host Description** field, add a name to identify this server in your address book.
6. In the **Host User Name** and **Host Password** fields, enter the server credentials provided by USPS DTS Operations.
7. Select a contact from the **Primary Contact** drop-down menu.

   Note: This field is required so the Application Team has a point of contact if there is a problem communicating with the server. If the selected contact does not have a phone number, the application prompts you to enter one. To add a contact, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your contacts.
8. When you are finished, click **Add to Address Book**. A pop-up window appears informing you the application is validating the credentials.
9. Close the window by clicking **OK** or the **X** icon.



   The server is added to the address book(s) for the selected CRID(s) and appears under the **Servers** section on the right side of the page.

   A warning icon will appear next to the server name throughout the application until the application has validated the credentials. Hovering on the icon displays a message indicating the reason for the warning. Once the application has validated the credentials, the warning icon does not appear.



Note:

- If the warning icon hover-over displays “Invalid username/password combination”, verify you have entered the account credentials correctly in the address book. If all appears correct but the message persists, contact the IV Solutions Center for assistance.
- If the warning icon hover-over displays “The server could not be validated”, contact the IV Solutions Center for assistance.

- You cannot use the USPS-provided server for data provisioning until 1) your account is created, 2) you have added the server to your address book with the provided account credentials, and 3) the application has validated successful connection to the server.
- You may add the server to your address book before satisfying these requirements. However, the warning icon will appear next to the server name throughout the application until you add the credentials and the application has validated them.
- USPS does not impose any file size constraints on the USPS-provided server.
- The retention time for files on the USPS-provided server is 30 days.
- USPS-provided server users can read/write/delete/create both files and folders on the server but only under their home directory. If a user drops files on the server, USPS will not pick them up. Unix naming conventions govern folder creation. Special characters and white space (e.g., spaces, tabs, #, &, /, |, $) are not allowed.

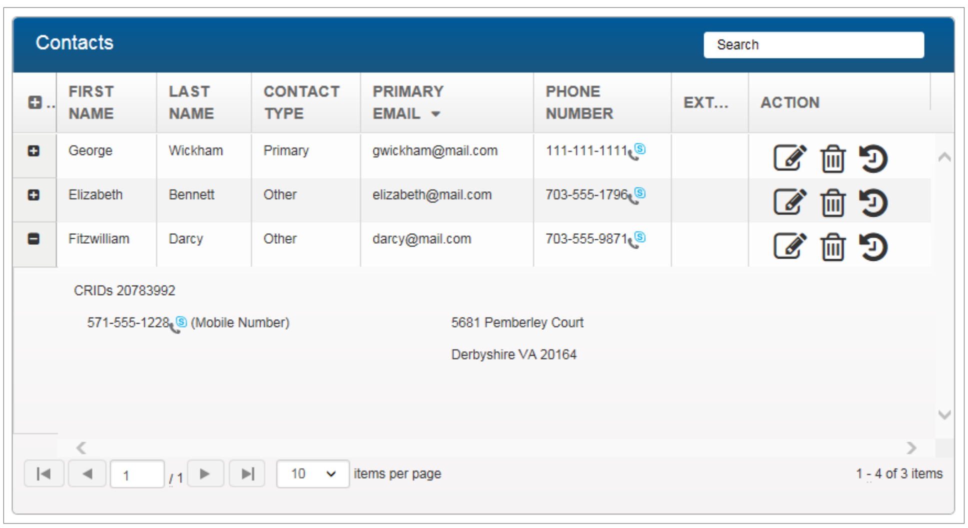
10.2 View and Add Contacts

To view and manage contact information for people, click the **Contacts** tab.

Note: Each address book entry belongs to a CRID and is shared by that CRID's users. Throughout the application, you see server and contact address book entries belonging to CRIDs for which you have the IV-MTR service.

10.2.1 Contacts

The **Contacts** table on the right side of the page displays the people already in your CRID address book(s).



In this table:

- Search by entering text in the search box (as you enter text, the contacts filter to display those matching your entry).
- To see additional information for a contact, click the **+** icon to the left of the contact's name.
- To modify an entry, click the modify icon. (**Note:** Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)

- To delete an entry, click the delete icon. (**Note:** Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)

  Note: You cannot delete a contact designated as the Primary Contact for a server. You must select a new Primary Contact for the server before deleting the contact.

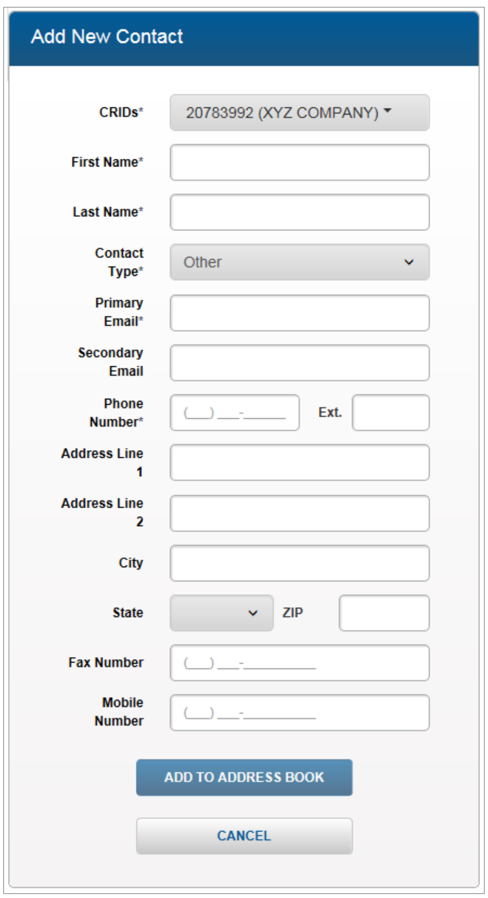
- To view the change history for an entry, click the view change history icon.
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

10.2.2 Add New Contact

Important: Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.

To add a new contact, complete the **Add New Contact** section on the left side of the page:

1. From the **CRIDs** drop-down menu, select the CRID(s) to whose address book(s) you want to add the contact.
2. Complete the remaining fields.
3. When you are finished, click **Add to Address Book**. The contact is added to the address book(s) for the selected CRID(s) and appears under the **Contacts** section on the right side of the page.

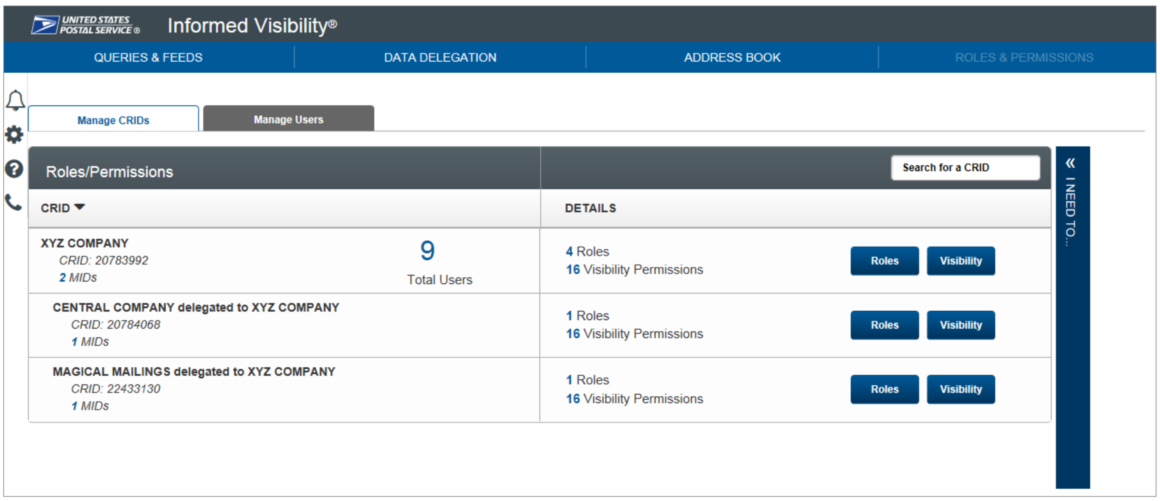


11 Roles and Permissions

Important: Only an IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can see and access this area of the application.

Within the IV-MTR application, users can be assigned roles and permissions. Roles provide application functionality to a user, while permissions provide data visibility to particular CRIDs, MIDs, or routing codes.

To access these functions, click **Roles & Permissions** in the top navigation bar. See the following sections for additional information about roles and permissions.



11.1 Roles & Permissions vs. Data Delegation

IV-MTR also provides data delegation functionality, which is different from roles and permissions management. Data delegation is used to share data between CRIDs—to provide visibility of a CRID or MID's data to another CRID or MID's users. Data delegation enables visibility to be shared between a company's own CRIDs or MIDs or between CRIDs or MIDs belonging to different companies. However, roles and permissions management is used to manage individual user visibility within a particular CRID.

The table below provides example scenarios for when you would use data delegation versus roles and permissions management. For additional information about data delegation, see Section 9: *Data Delegation*.

Table 11.1: Examples of Data Delegation and Roles & Permissions Management

Data Delegation	Roles & Permissions
• Customer wants to delegate visibility of a MID to a third-party service provider • Company with more than one CRID wants to delegate visibility of one CRID to another of the company's CRIDs (enables users to have visibility of multiple CRIDs for the company but only have the IV-MTR service for one CRID)	• Company wants to assign a role to a user to allow that user to perform certain functions within the application for the company's CRID • Company wants to set visibility permissions for a user to allow him/her to see only certain MIDs belonging to the company's CRID • Company wants to set default visibility permissions to determine what new users can see when they get the IV-MTR service for the company's CRID

11.2 User Roles

Your BCG access level for the IV-MTR service and your application role(s) determine your ability to perform certain functions within the BCG and IV-MTR web application. All users have a BCG access level for the service and may have a role or roles in the application. Application roles are assigned within the Roles & Permissions area.

There are five application user roles:

- Address Book Manager
- Data Delegation Manager
- Report Manager
- Roles and Permissions Manager
- Subscription Manager

Having a role in the application enables you to perform certain administrative functions. There are five application user roles. See the following table for a description of each role.

Table 11.2: IV-MTR Application User Roles

Role	Description	CRID or MID Level
Address Book Manager	Manages a CRID's address book	CRID only*
Data Delegation Manager	Manages data delegation for a CRID or MID	MID or CRID
Report Manager	Creates and manages a CRID's **public** saved reports and portions of reports	CRID only*
Roles and Permissions Manager	Assigns roles and permissions for a CRID or MID	MID or CRID
Subscription Manager	Creates and manages a CRID's data feeds (subscriptions)	CRID only*

** The Address Book Manager, Report Manager, and Subscription Manager roles can only be assigned at the CRID level.*

The application user roles can be assigned at the MID or CRID level:

- When a role is assigned at the MID level, the user can perform the role's functions only for a specific MID. For example, a user with the Data Delegation Manager role for MID A1 could manage data delegation in the application for MID A1 but not for other MIDs belonging to CRID A (the CRID to which MID A1 belongs).
- When a role is assigned at the CRID level, the user can perform the role's functions for an entire CRID, including all MIDs that belong, or will belong, to that CRID. For example, a user with the Data Delegation Manager role for CRID A could manage data delegation in the application for CRID A **and** all MIDs that belong, or will belong, to that CRID.
- The table above indicates whether each role can be assigned at the MID or CRID level, or only at the CRID level. Please note that three of the user roles can only be assigned at the CRID level.

The IV-MTR BSA, BSA Delegates, and users with the Roles and Permissions Manager role for a CRID manage your application user roles for that CRID or MIDs belonging to that CRID. You may have zero, one, or multiple user roles.

Your roles are specific to a CRID, or to a MID belonging to a CRID, for which you have the IV-MTR service. If you have the service for multiple CRIDs, you could have different application user roles for each CRID. For example, you could be assigned as an Address Book Manager for one CRID, a Data

Delegation Manager for another CRID, and not be assigned a role for a third CRID. The IV-MTR BSA and BSA Delegates for a particular CRID are “super users” for that CRID, meaning they have all five application user roles.

If you have a role or roles in the application, additional functionality is available to you in the application. For information about the functionality available for each user role, see Table 5.2: *Functionality by Access Level and User Role*.

The functions a user can perform within the IV-MTR application depend on the user’s BCG access level and any assigned application user roles. See Table 5.2: *Functionality by Access Level and User Role* for information about the specific functionality available for each application user role.

11.3 Default and Custom Roles & Permissions

There are two sets of default roles and permissions in IV-MTR: the USPS (system) default and the CRID default. The USPS default is such that non-BSA and non-BSA Delegate users:

- Do not have any application user roles
- Have complete visibility of all mail object and handling event types for the CRID as well as any MIDs belonging to, and routing codes associated with, the CRID

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can create a CRID default that provides users with specific roles and permissions. For example, the CRID default could assign the Address Book Manager role and provide visibility of only one of the MIDs belonging to the CRID. New users granted the IV-MTR service for the CRID inherit the CRID default, if one exists. Otherwise, new users inherit the USPS default roles and permissions.

When a user is inheriting the CRID default, the user’s roles and permissions change as the CRID default changes. For example, if the Data Delegation Manager role were added to the CRID default, any users inheriting the CRID default would receive the Data Delegation Manager role.

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager for a CRID can also customize the application roles and visibility permissions for individual users. When a user’s roles and permissions are changed from the CRID default, the user no longer inherits the CRID default. This means the user’s roles and permissions would not change if the CRID default changed. The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can reset a user back to the CRID default as needed. In addition, the IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can reset the CRID default back to the USPS default as needed.

For information about creating and managing a CRID default, see Section 11.4.3: *Set the CRID Default*. For information about resetting a user to the CRID default or resetting the CRID default to the USPS default, see Section 11.4.2.7: *Reset to CRID or USPS Default.*

11.4 Managing Roles & Permissions

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager for a CRID can manage roles and permissions for that CRID’s users. Within the Roles & Permissions area of the application, there are two tabs:

- The **Manage CRIDs** tab allows you to manage roles and permissions at the CRID level, meaning you can assign a role or grant permissions to *multiple* users for *one* CRID at a time.
- The **Manage Users** tab allows management at the user level, meaning you can assign a role or grant permissions to *one* user for *multiple* CRIDs at a time.

The table below can assist you in knowing whether you want to use the **Manage CRIDs** or **Manage Users** tab. For each action listed, the table gives the location where you would perform the action within the Roles & Permissions area of the application and where you can find instructions within this guide.

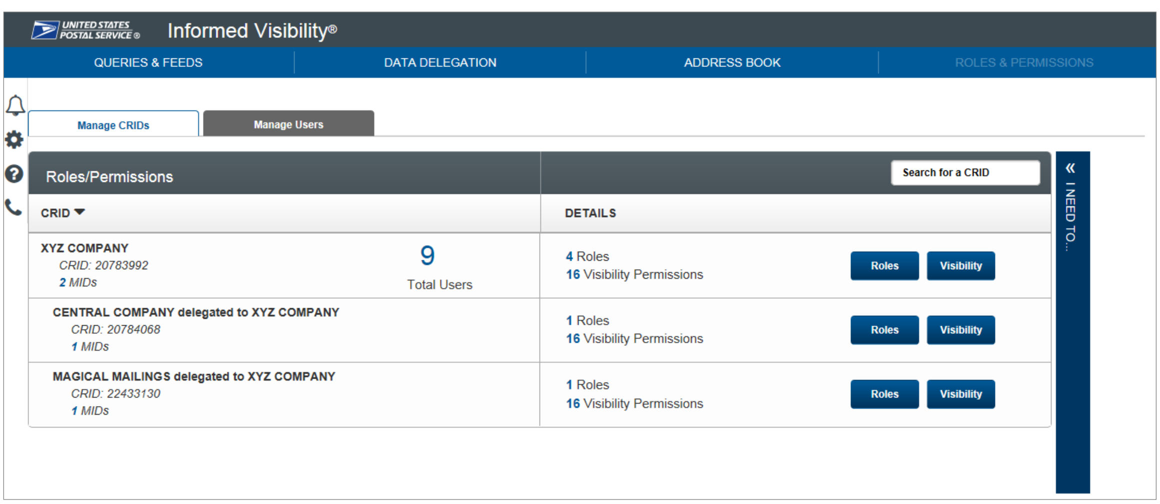
Table 11.3: Actions for Manage CRIDs and Manage Users Tabs

Action	Location	Instructions
View roles assigned to users for a particular CRID	**Manage CRIDs** > **Roles**	11.4.1.1: *View Assigned Roles*
View roles assigned to a particular user	**Manage Users** > **Roles**	11.4.2.1: *View Assigned Roles*
View permissions assigned to users for one CRID	**Manage CRIDs** > **Visibility**	11.4.1.4: *View Assigned Permissions*
View permissions assigned to one user	**Manage Users** > **Visibility**	11.4.2.4: *View Assigned Permissions*
Assign one or more users a role for one CRID	**Manage CRIDs** > **Roles**	11.4.1.2: *Assign a Role*
Assign one user a role for multiple CRIDs	**Manage Users** > **Roles**	11.4.2.2: *Assign a Role*
Assign one or more users permissions for one CRID	**Manage CRIDs** > **Visibility**	11.4.1.5: *Assign Permissions*
Assign one user permissions for multiple CRIDs	**Manage Users** > **Visibility**	11.4.2.5: *Assign Permissions*
Reset a user's roles and permissions to the CRID default or reset the CRID default to the USPS (system) default	**Manage Users** > **Advanced**	11.4.2.7: *Reset to CRID or USPS Default*
Grant access to delegated data by default	**Manage Users** > **Advanced**	11.4.2.8: *Grant Delegated Data by Default*

See the following sections for additional information about managing roles and permissions.

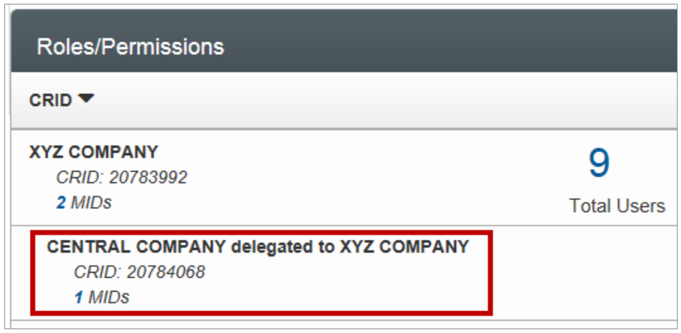
11.4.1 Manage by CRID

The **Manage CRIDs** tab allows you to manage roles and permissions at the CRID level, meaning you can manage roles or permissions for *multiple* users for *one* CRID at a time.

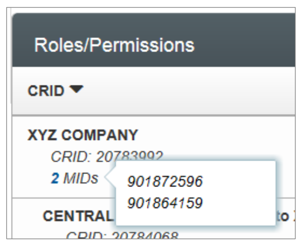


On this tab:

- The **CRID** column lists the CRIDs for which you are the IV-BSA, BSA Delegate, or Roles and Permissions Manager.
  - If one of those CRIDs is receiving visibility of another CRID through data delegation, the Delegating CRID displays under the Receiving CRID and indented slightly.

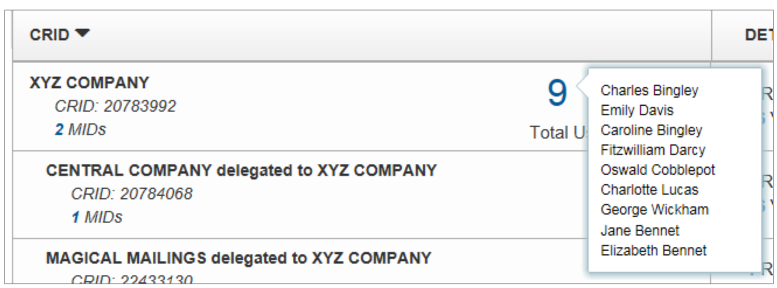


  - To see a list of MIDs that belong to or are being delegated to a CRID, hover on the number of MIDs.



  - To see a list of users with the IV-MTR service for a CRID, hover on the number of total users.

    Note: This capability is not available for listed Delegating CRIDs.



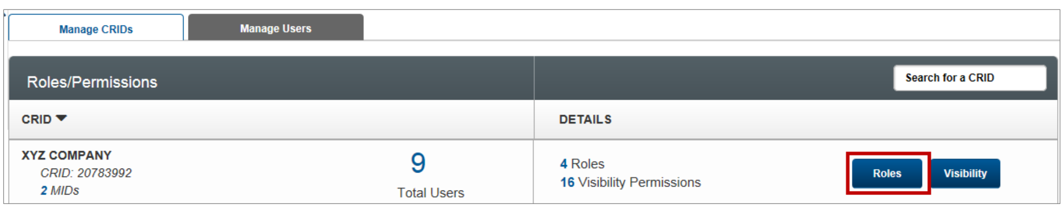
- The **Details** column displays the number of roles and visibility permissions that are available to be assigned and has buttons to manage the roles and visibility for the CRID.
  - To assign or remove a role from CRID users, click **Roles**. For instructions, see Section 11.4.1.2: *Assign a Role* and Section 11.4.1.3: *Remove a Role*.
  - To assign or remove permissions from CRID users, click **Visibility**. For instructions, see Section 11.4.1.5: *Assign Permissions* and Section 11.4.1.6: *Remove Permissions*.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).

- If you need assistance knowing which tab to be on, and which button to click to perform the desired action, click **I Need To…** on the right side of the table. A window opens and displays common actions. Hover on an action for guidance on where to navigate to perform that action.

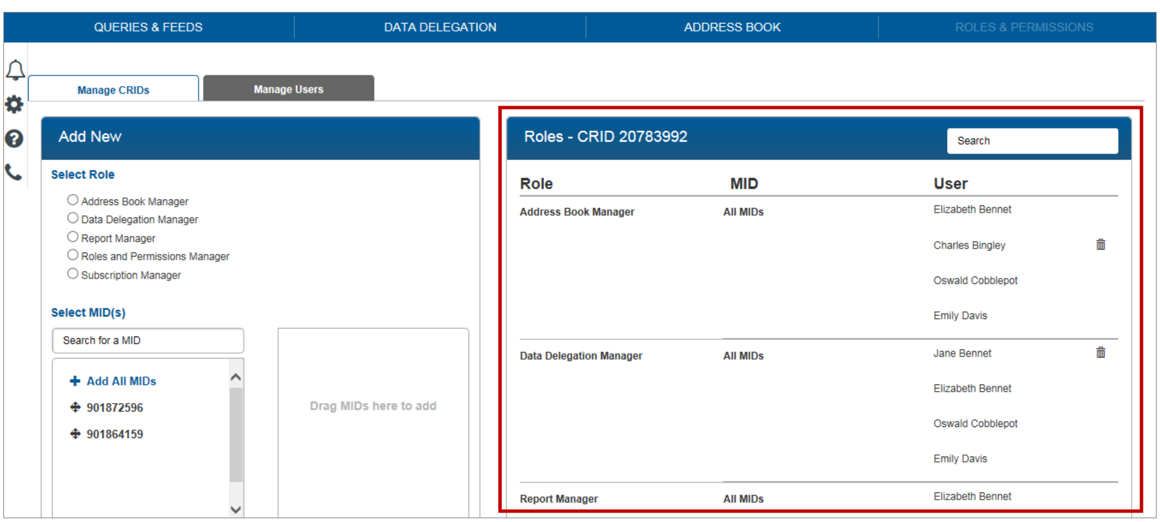
See the following sections for instructions to view, assign, or remove a role or visibility permissions.

11.4.1.1 View Assigned Roles

To view the roles assigned to a CRID's users, find the CRID on the **Manage CRIDs** tab, and click **Roles** in that CRID's row.



The **Roles** table on the right side of the page displays the roles assigned to the CRID's users.



In this table:

- The table is organized by role and lists those users who have a particular role for a particular CRID or MID.

- In the **MID** column, “All MIDs” indicates a CRID-level role is assigned.
- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
- To remove a role, click the delete icon to the right of the user’s name. Click **Yes** when prompted to confirm that you want to delete the role.

  Note:

  – You can only remove one role from one user at a time.

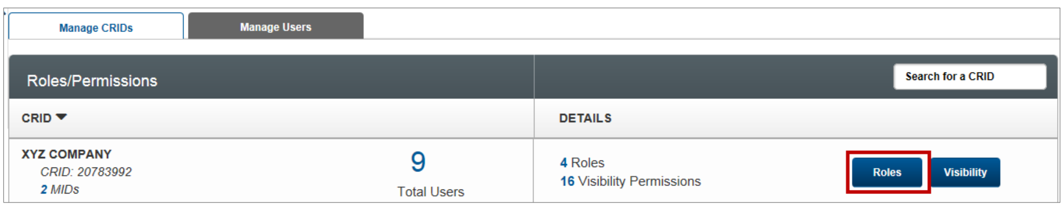
  – IV-MTR BSA and BSA Delegate users have all roles assigned. You cannot remove these role assignments; therefore, the delete icon is not available for these users.

11.4.1.2 Assign a Role

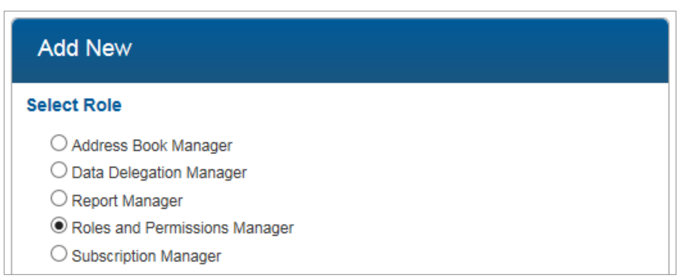
Five application user roles can be assigned. For a description of the roles, see Table 11.2: *IV-MTR Application User Roles*.

To assign a role, follow these steps:

1. On the **Manage CRIDs** tab, find the CRID whose roles you would like to manage, and click **Roles** in that CRID’s row.



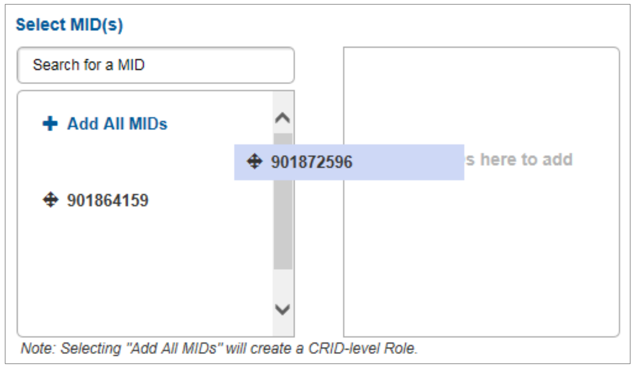
2. Select the role to assign.



3. Select the MID(s) to which the role assignment should apply:

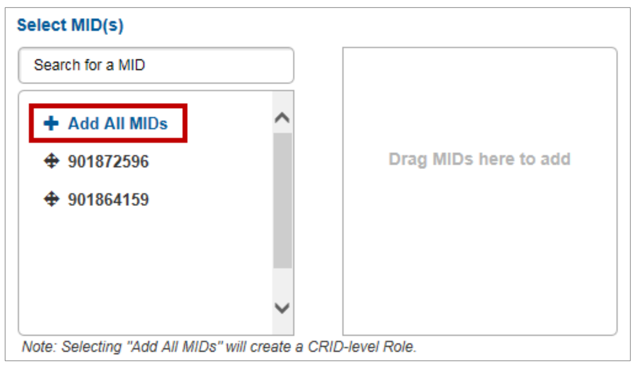
   - **Note:** The Address Book Manager, Report Manager, and Subscription Manager roles can only be assigned at the CRID level. If you selected one of these roles, there is no action for you in the **Select MID(s)** area of the screen.

- To add a MID, find the MID on the left side of this section. Drag the MID to the right side OR double-click the MID on the left side to move it to the right side.

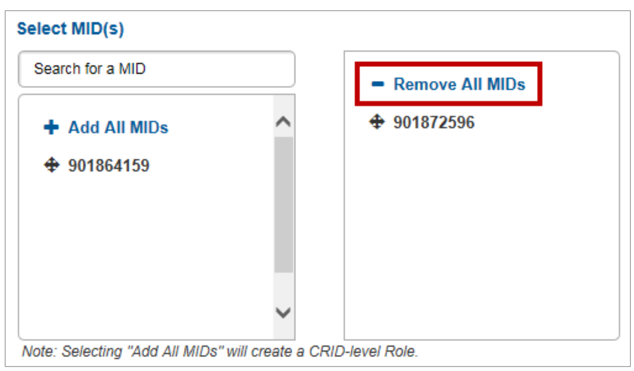


- To add all MIDs, click **Add All MIDs**.

  Note: This creates a CRID-level role, meaning the user will be able to perform the role's functions for all of the MIDs belonging to the CRID.



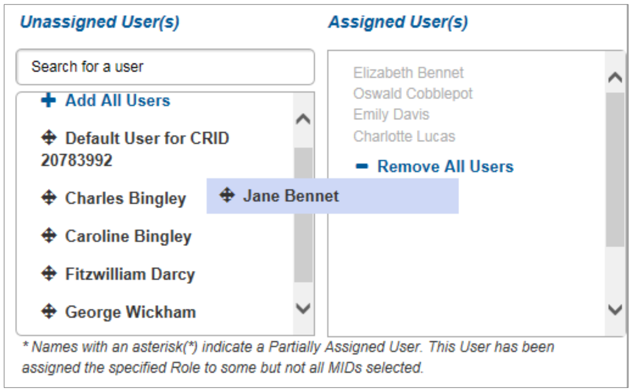
- To remove a MID, drag it from the right side to the left side OR double-click the MID on the right side to return it to the left side. To remove all of the MIDs, click **Remove All MIDs**.



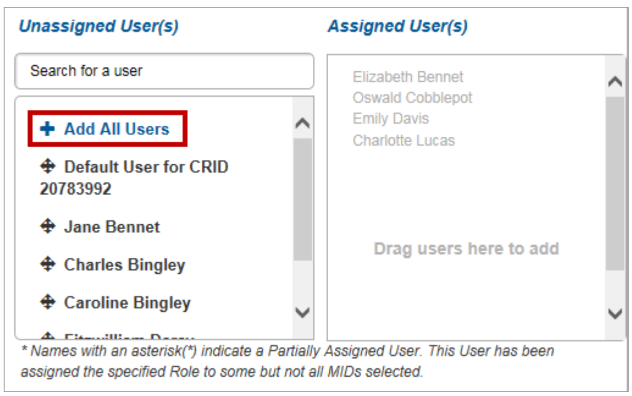
- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

4. When finished, click **Next**.

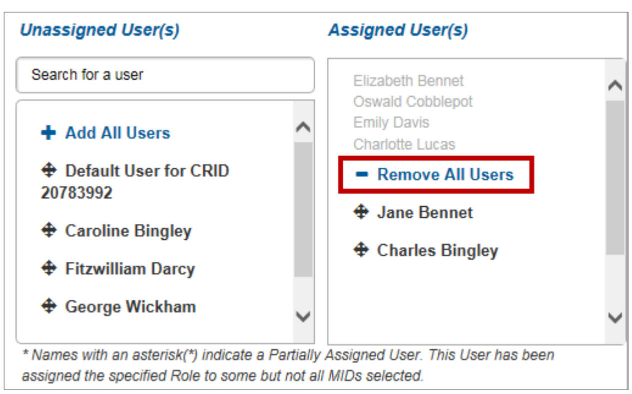
5. Select the user(s) to be assigned the role:
    - To add a user, find the user on the left side of this section. Drag the user to the right side OR double-click the user on the left side to move the user to the right side.



    - To add all users, click **Add All Users**.

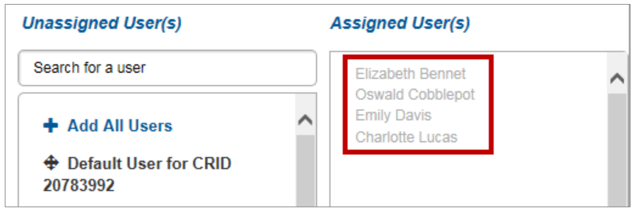


    - To remove a user, drag the user from the right side to the left side OR double-click the user on the right side to return the user to the left side. To remove all of the users, click **Remove All Users**.

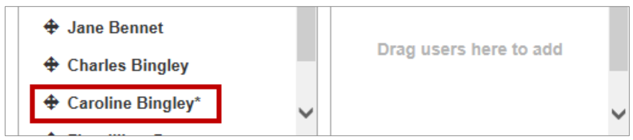


    - Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

- **Note:**
  - Grayed out users displayed on the right side are those users who already have the selected role assigned.



  - Users with an asterisk (*) are partially assigned, meaning the user has been assigned the selected role to one or more—but not all—of the selected MIDs.

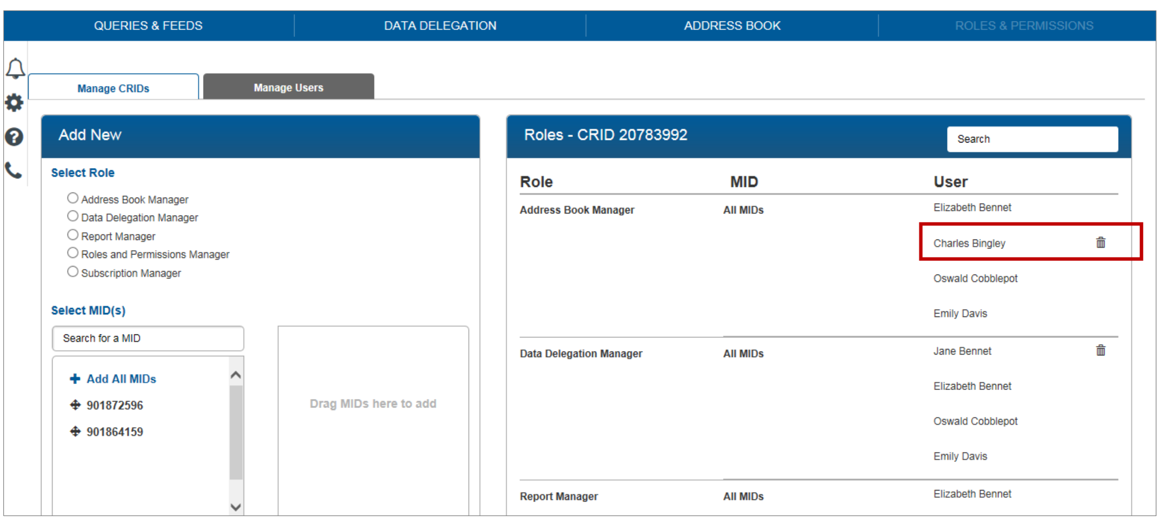


6. When finished, click **Finish**. The role is assigned as selected, and the role assignment appears in the table to the right.

   Note: If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.

11.4.1.3 Remove a Role

To remove a role, click the delete icon to the right of the user's name in the **Roles** table. Click **Yes** when prompted to confirm that you want to delete the role.

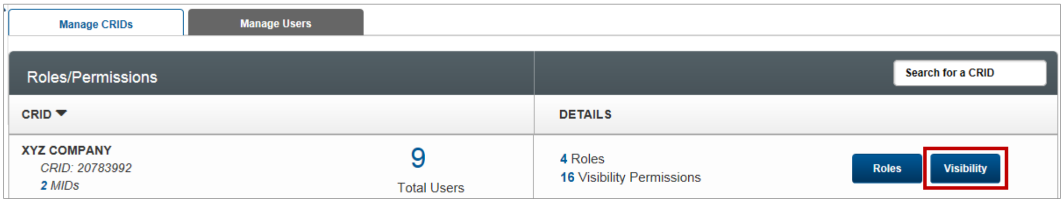


Note:

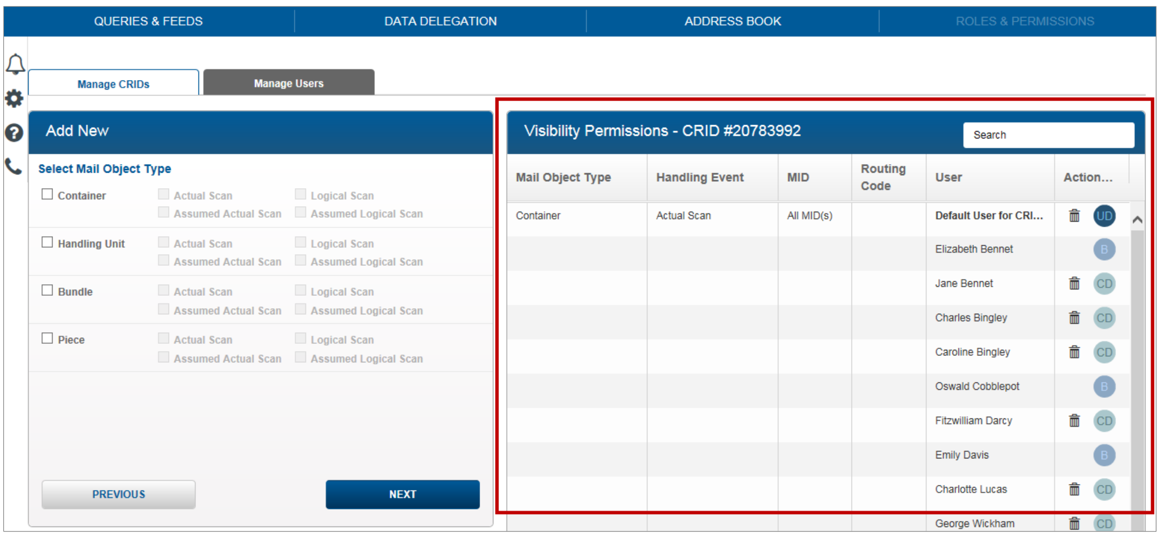
- You can only remove one role from one user at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: *Reset to CRID or USPS Default*.
- IV-MTR BSA and BSA Delegate users have all roles assigned. You cannot remove these role assignments; therefore, the delete icon is not available for these users.

11.4.1.4 View Assigned Permissions

To view the permissions assigned to a CRID's users, find the CRID on the Manage CRIDs table, and click **Visibility** in that CRID's row.



The **Visibility Permissions** table on the right side of the page displays the permissions assigned to the CRID's users.



In this table:

- The table is organized by mail object type and handling event type and lists those users who have visibility for a particular CRID, MID, or routing code.
- In the **MID** column, "All MIDs" indicates a CRID-level permission is assigned.
- In the **User** column, "Default User for CRID [Number]" represents the Default User for the CRID. This allows you to see which mail object types, handling event types, CRIDs, MIDs, and/or routing codes are assigned as the CRID default.
- In the **Action** column, a circle icon indicates if a user has a particular permission because he or she is the IV-MTR BSA or BSA Delegate or is inheriting the CRID or USPS default:
  - The B (B) icon indicates the user is the IV-MTR BSA or a BSA Delegate. Therefore, the user has complete visibility (all mail object and handling unit types for all CRIDs, MIDs, and routing codes).
  - The CD (CD) icon indicates the user is inheriting the CRID default permissions. Therefore, the user has visibility of the mail object types, handling event types, CRIDs, MIDs, and/or routing codes that are part of the CRID default. For information about the CRID default, see Section 11.3: *Default and Custom Roles & Permissions*.

  Note: The UD (UD) icon can be displayed for the "Default User". This indicates the CRID default is currently set to the USPS (system) default permissions.

- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
- To remove a permission, click the delete icon in the **Action** column to the right of the user's name. Click **Yes** when prompted to confirm that you want to delete the permission.

  Note:

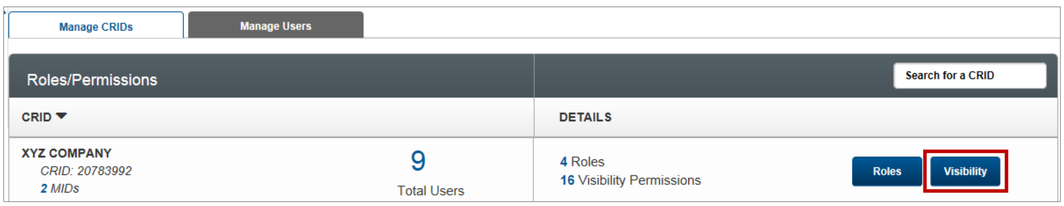
  – You can only remove one permission from one user at a time.

  – IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. You cannot remove these permission assignments; therefore, the delete icon is not available for these users.

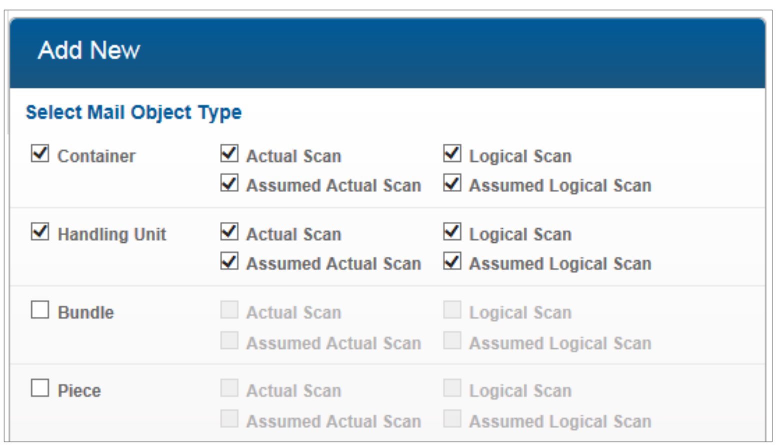
11.4.1.5 Assign Permissions

To assign a permission, follow these steps:

1. On the **Manage CRIDs** tab, find the CRID whose permissions you would like to manage, and click **Visibility** in that CRID's row.



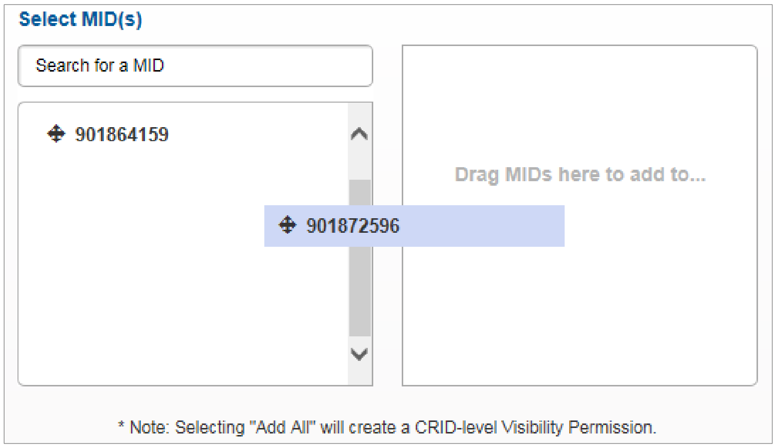
2. Select one or more mail object type(s) and one or more handling event type(s).



3. When finished, click **Next**.

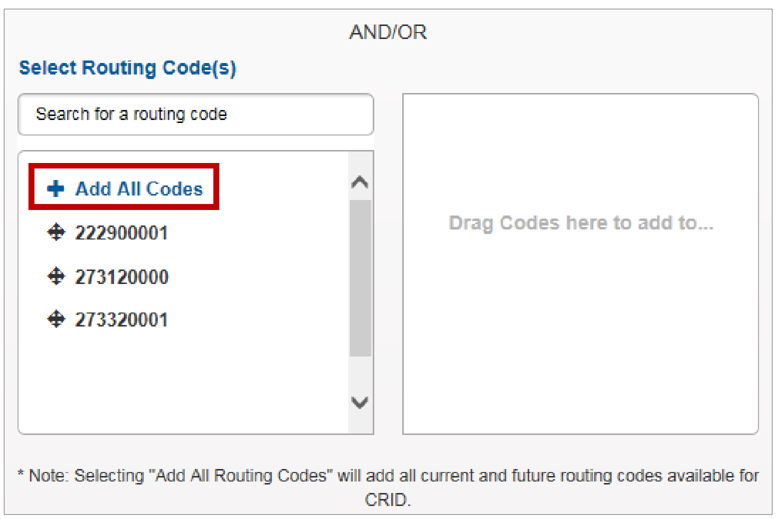
4. Select the MID(s) and/or routing code(s) to provide visibility of:

   - To add a MID or routing code, find the MID or routing code on the left side of this section. Drag the MID or routing code to the right side OR double-click the MID or routing code on the left side to move it to the right side.

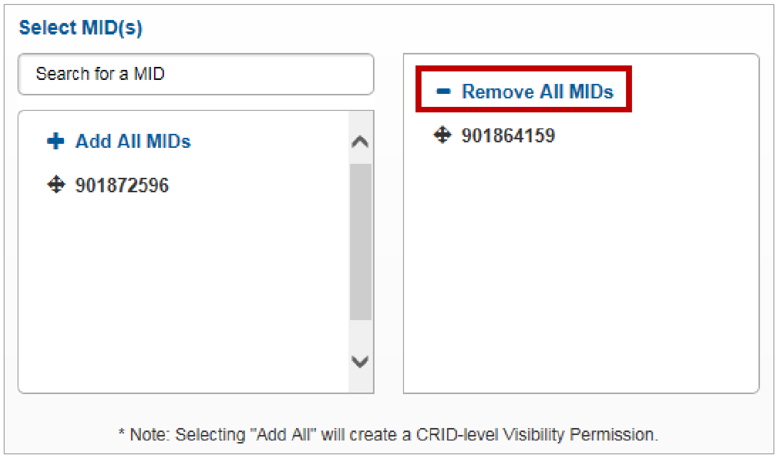


   - To add all MIDs or routing codes, click **Add All MIDs** or **Add All Codes**.

     Note: If you add all MIDs, a CRID-level permission is created, meaning the user will have visibility of the selected mail object and handling event types for all of the MIDs belonging to the CRID.



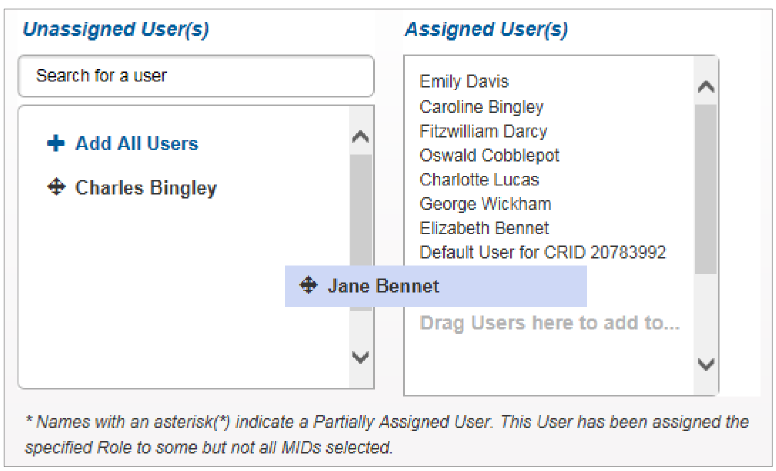
- To remove a MID or routing code, drag it from the right side to the left side OR double-click the MID or routing code on the right side to return it to the left side. To remove all of the MIDs or routing codes, click **Remove All MIDs** or **Remove All Codes**.



- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

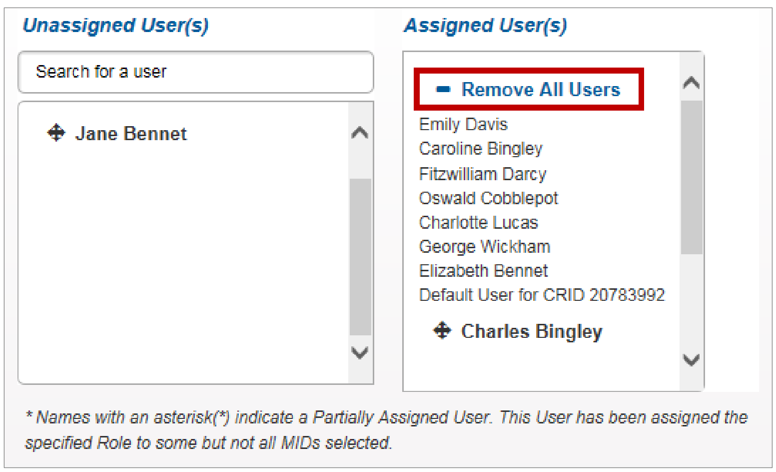
5. When finished, click **Next**.
6. Select the user(s) to be assigned the permission:

- To add a user, find the user on the left side of this section. Drag the user to the right side OR double-click the user on the left side to move the user to the right side.

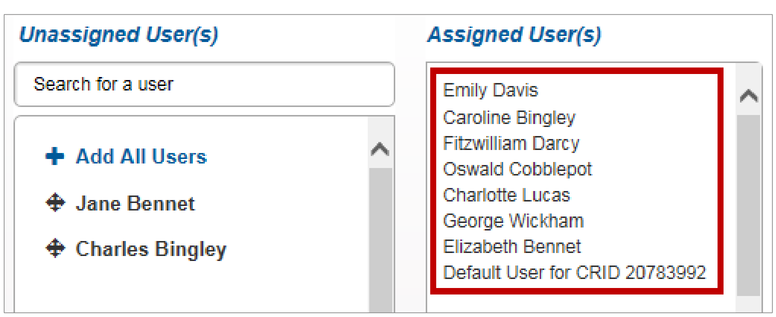


- To add all users, click **Add All Users**.

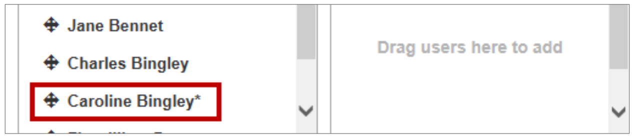
- To remove a user, drag the user from the right side to the left side OR double-click the user on the right side. To remove all of the users, click **Remove All Users**.



- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).
- **Note:**
  - Users displayed on the right side without the select ✥ icon are those users who already have the selected permission assigned.

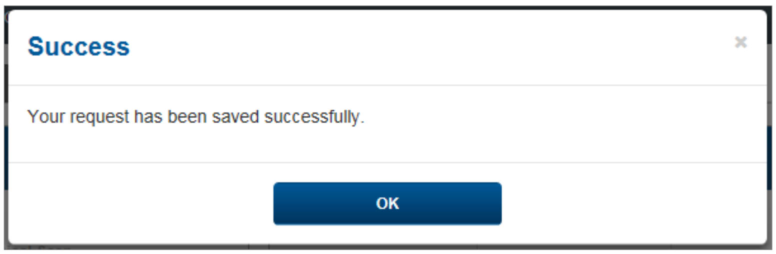


– Users with an asterisk (*) are partially assigned, meaning the user has been assigned the selected permission to one or more—but not all—of the selected MIDs.



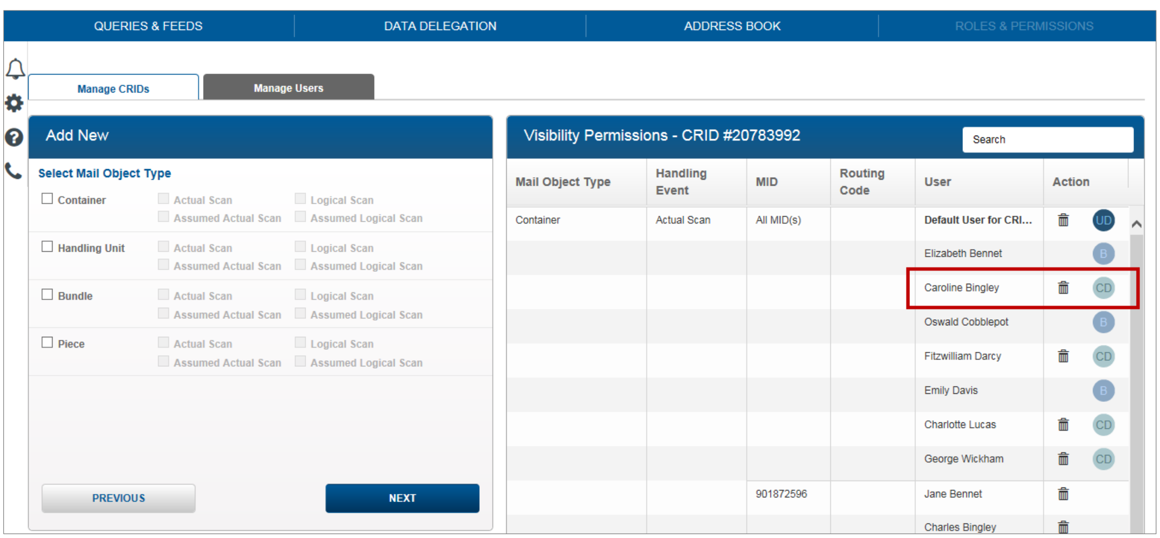
7. When finished, click **Finish**. A window appears confirming the permissions were assigned successfully.
8. To close the window, click **OK** or click the **X** icon. The permission is assigned as selected, and the permission assignment appears in the table to the right.

   Note: If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.



11.4.1.6 Remove Permissions

To remove a permission, click the delete icon in the **Action** column to the right of the user's name in the **Visibility Permissions** table. Click **Yes** when prompted to confirm that you want to delete the permission.



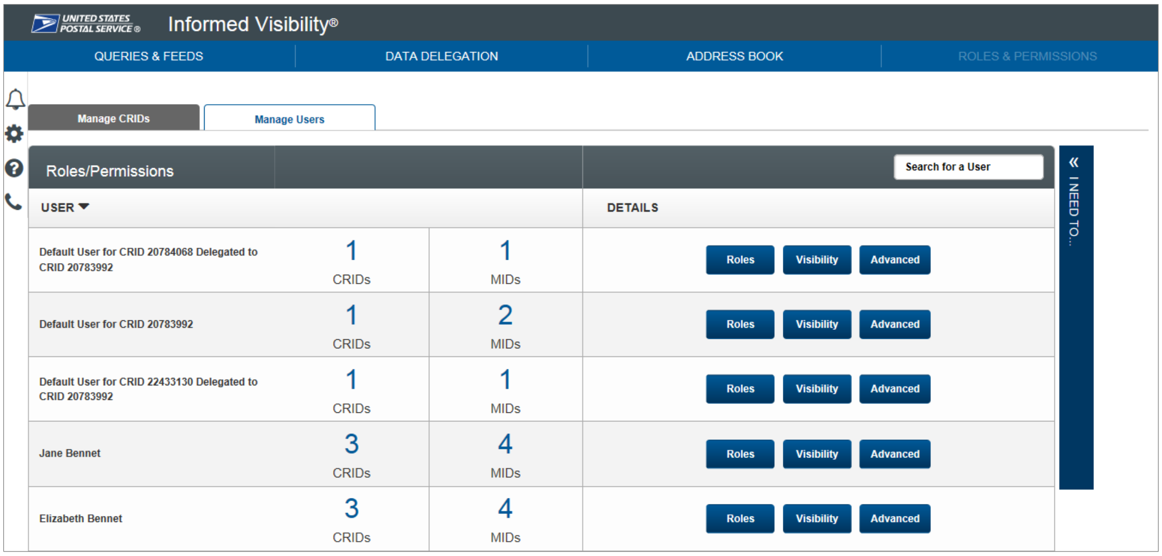
Note:

- You can only remove one permission from one user at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: *Reset to CRID or USPS Default*.

- IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. You cannot remove these permission assignments; therefore, the delete icon is not available for these users.

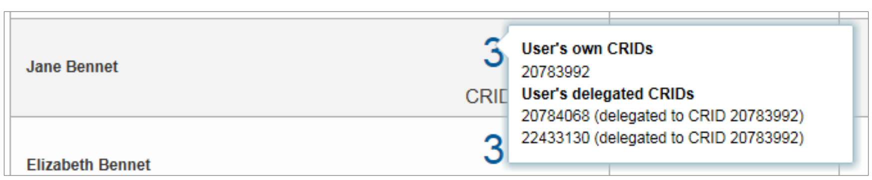
11.4.2 Manage by User

The **Manage Users** tab allows you to manage roles and permissions at the user level, meaning you can manage roles or permissions for *one* user for *multiple* CRID at a time.

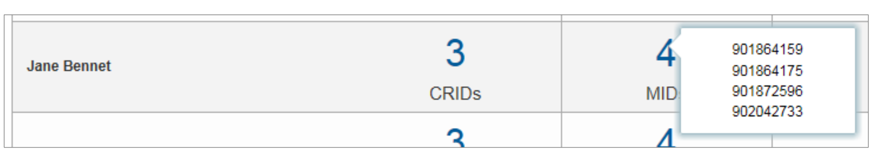


On this tab:

- The **User** column lists the users who have the IV-MTR service for a CRID for which you are the IV-BSA, BSA Delegate, or Roles and Permissions Manager.
  - The Default User(s) for these CRIDs, and for CRIDs delegated to those CRIDs, appear at the top of the table by default.
  - The application displays the number of CRIDs to which the user is associated. To see the CRID numbers, hover on the number of CRIDs.



  - The application displays the number of MIDs with which the user is associated. To see the MID numbers, hover on the number of MIDs.



- The **Details** column has buttons to manage the roles and visibility for the CRID.
  - To assign or remove a role from a user, click **Roles**. For instructions, see Section 11.4.2.2: *Assign a Role* and Section 11.4.2.3: *Remove a Role*.
  - To assign or remove permissions from a user, click **Visibility**. For instructions, see Section 11.4.2.5: *Assign Permissions* and Section 11.4.2.6: *Remove Permissions*.

– To return a user to the CRID or USPS default or grant a user visibility of delegated data by default, click Advanced. For instructions see Section 11.4.2.7: *Reset to CRID or USPS Default* and Section 11.4.2.8: *Grant Delegated Data by Default*.

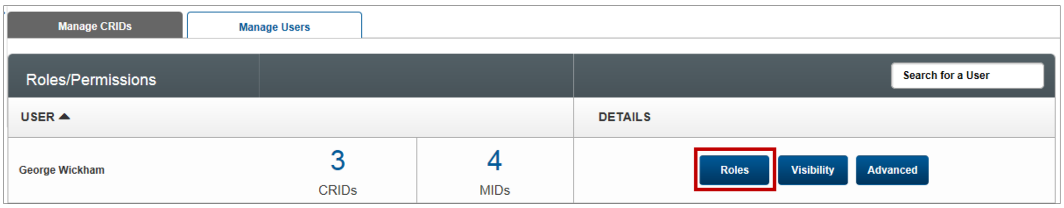
  Note: You can return a "Default User" to the USPS default. You can return all other users to the CRID default.

- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- If you need assistance knowing which tab you need to be on, and which button to click to perform the desired action, click **I Need To…** on the right side of the table. A window opens and displays common actions. Hover on an action for guidance on where to navigate to perform that action.

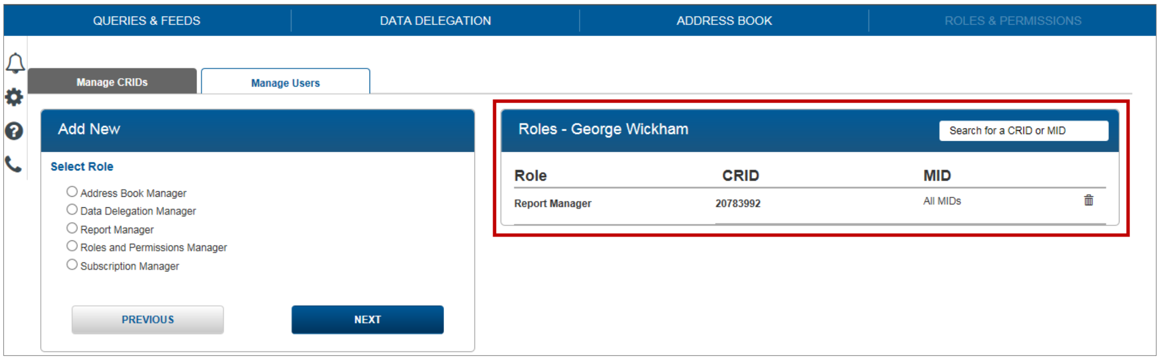
See the following sections for instructions to assign or remove a role or visibility permissions, return a user to the CRID or USPS default, and grant a user visibility of delegated data by default.

11.4.2.1 View Assigned Roles

To view the roles assigned to particular user, find the user on the **Manage Users** tab, and click **Roles** in that user's row.



The **Roles** table on the right side of the page displays the roles assigned to the user.



In this table:

- The table is organized by role and lists the CRID(s) and MID(s) for which the user has a particular role.
- In the **MID** column, "All MIDs" indicates a CRID-level role is assigned.
- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
- To remove a role, click the delete icon to the right of role. Click **Yes** when prompted to confirm that you want to delete the role.

  Note:

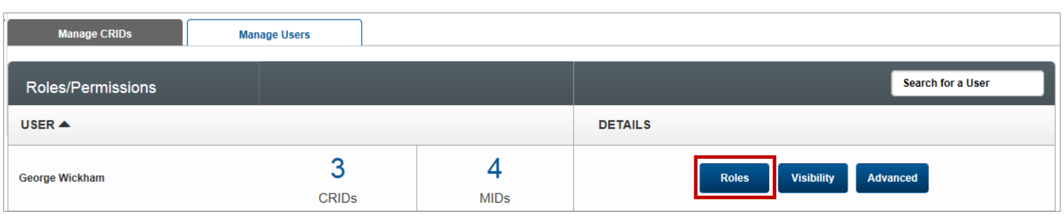
  - You can only remove one role for one CRID or MID at a time.
  - IV-MTR BSA and BSA Delegate users have all roles assigned. You cannot remove these role assignments; therefore, the delete icon is not available for these users.

11.4.2.2 Assign a Role

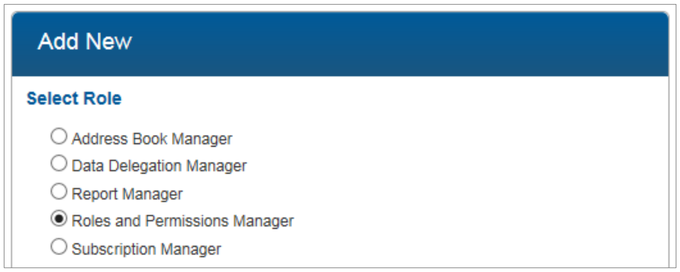
Five application user roles can be assigned. For a description of the roles, see *Table 11.2: IV-MTR Application User Roles*.

To assign a role, follow these steps:

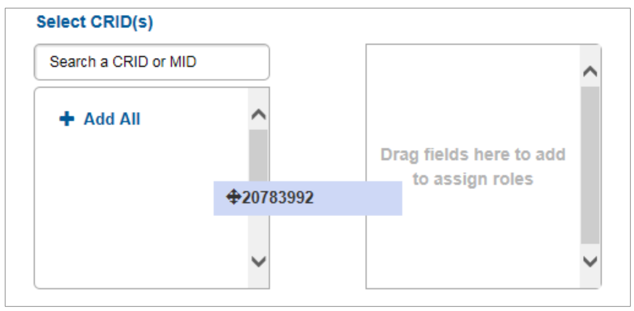
1. On the **Manage Users** tab, find the user you would like to assign a role to, and click **Roles** in that user's row.



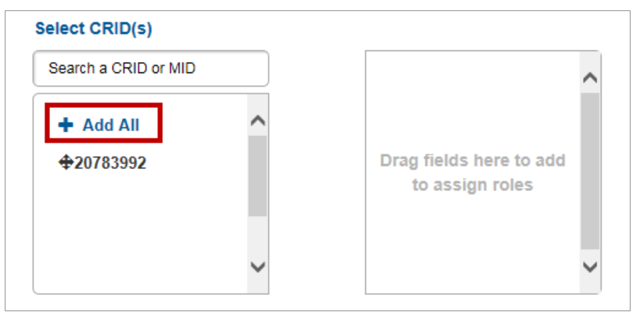
2. Select the role to assign.



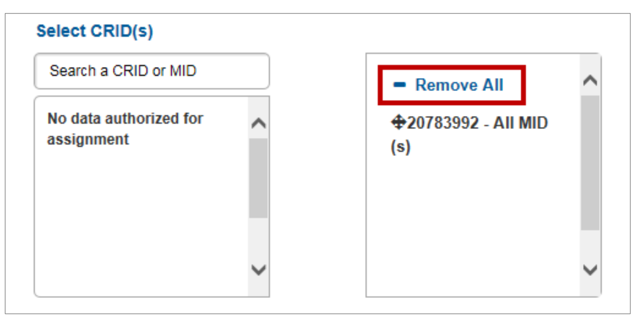
3. Click **Next**.
4. Select the CRID(s) and/or MID(s) to which the role assignment should apply. The functionality depends on which role you have selected:
   - **Address Book Manager, Report Manager, or Subscription Manager:** These roles can only be assigned at the CRID level.
     - To add a CRID, find the CRID on the left side of this section. Drag the CRID to the right side OR double-click the CRID on the left side to move it to the right side.



     - To add all CRIDs, click **Add All**.



     - To remove a CRID, drag it from the right side to the left side OR double-click the CRID on the right side to return it to the left side. To remove all of the CRIDs, click **Remove All**.

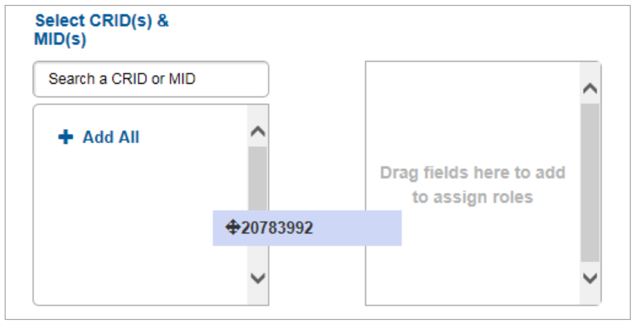


– Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

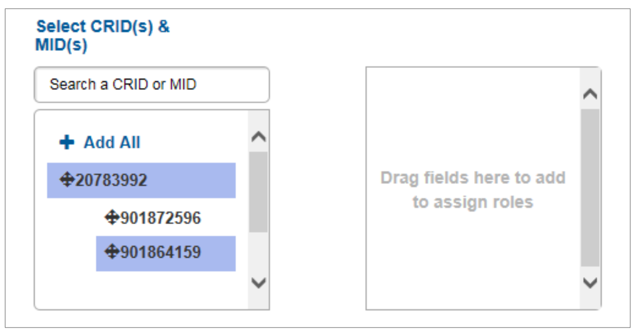
- **Data Delegation Manager or Roles and Permissions Manager:** These roles can be assigned at the CRID or MID level.

  – To add a CRID-level role, find the CRID on the left side of this section. Drag the CRID to the right side.

  Note: If the MIDs display below the CRID when you drag the CRID to the right side, the role will be assigned for the MIDs listed—not a CRID-level role. To create a CRID-level role, first collapse the MIDs list by clicking the CRID number. Then, drag the CRID to the right side.

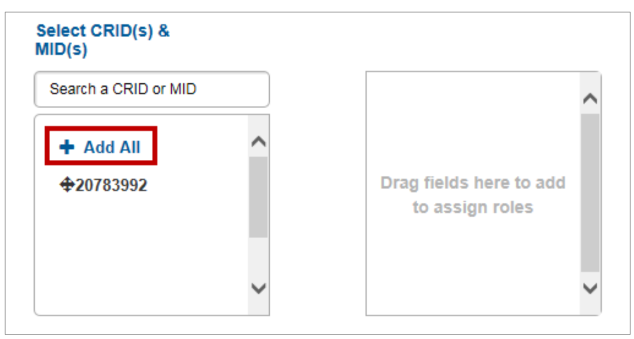


  – To add a MID-level role, click the CRID on the left side of this section. The MIDs display below the CRID. Click to deselect any MIDs for which you do not wish to assign the role. Then, drag the CRID, or one of the MIDs, to the right side.

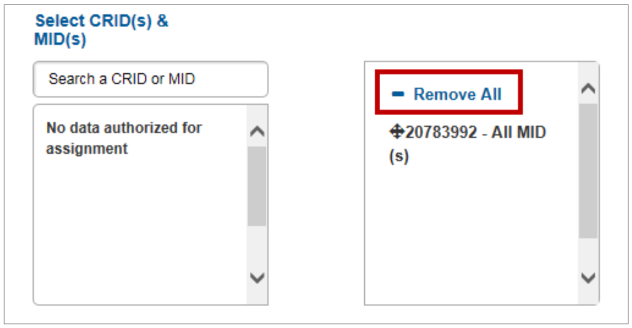


  – To add all CRIDs, click **Add All**.

  Note: Selecting **Add All** creates a MID-level role for each MID available for each displayed CRID. To create a CRID-level role, you must select each CRID individually.



– To remove a CRID or MID, drag it from the right side to the left side OR double-click the number on the right side to return it to the left side. To remove all of the CRIDs or MIDs, click **Remove All**.



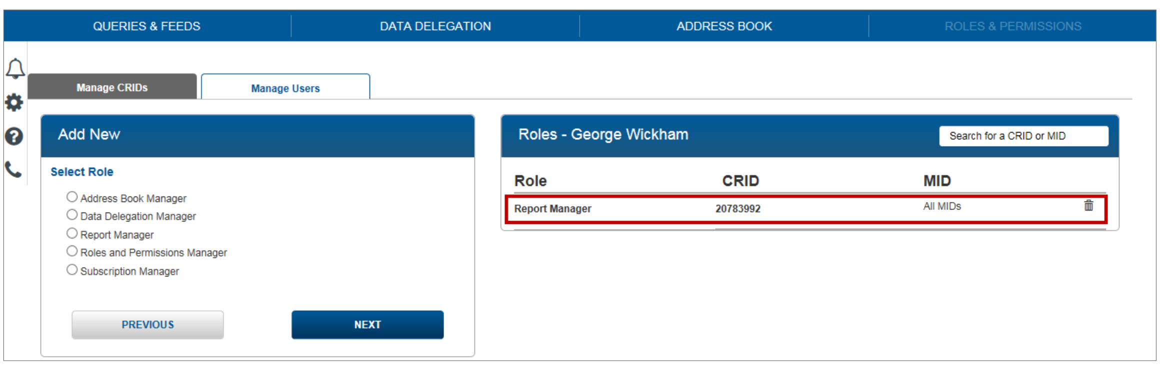
– Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

5. When finished, click **Finish**. The role is assigned as selected, and the role assignment appears in the table to the right.

   Note: If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.

11.4.2.3 Remove a Role

To remove a role, click the delete icon to the right of the role in the **Roles** table. Click **Yes** when prompted to confirm that you want to delete the role.

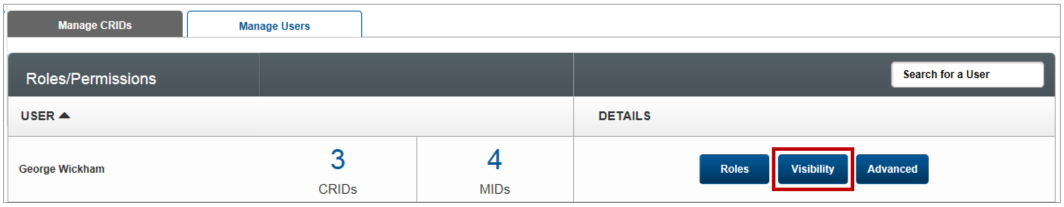


Note:

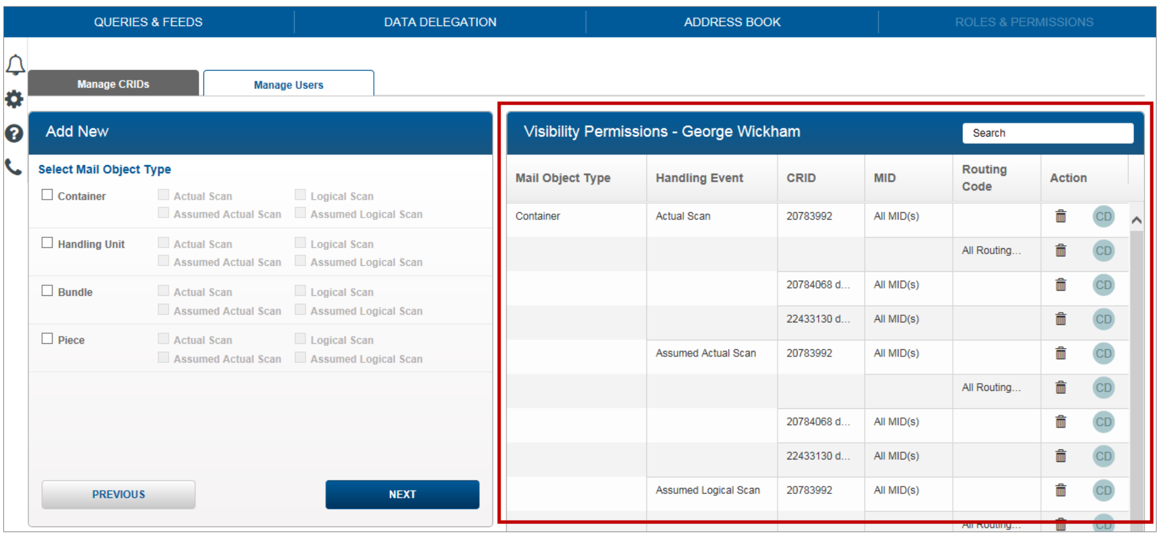
- You can only remove one role at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: *Reset to CRID or USPS Default*.
- IV-MTR BSA and BSA Delegate users have all roles assigned. You cannot remove these role assignments; therefore, the delete icon is not available for these users.

11.4.2.4 View Assigned Permissions

To view the permissions assigned to a user, find the user on the **Manage Users** table, and click **Visibility** in that user's row.



The **Visibility Permissions** table on the right side of the page displays the permissions assigned to the user.



In this table:

- The table is organized by mail object type and handling event type and lists those CRIDs, MIDs, or routing codes for which the user has visibility.
- In the **MID** column, "All MIDs" indicates a CRID-level permission is assigned.
- In the **Action** column, a circle icon indicates if the user has a particular permission because he or she is the IV-MTR BSA or BSA Delegate or is inheriting the CRID or USPS default:
  - The B icon indicates the user is the IV-MTR BSA or a BSA Delegate. Therefore, the user has complete visibility (all mail object and handling unit types for all CRIDs, MIDs, and routing codes).
  - The CD icon indicates the user is inheriting the CRID default permissions. Therefore, the user has visibility of the mail object types, handling event types, CRIDs, MIDs, and/or routing codes that are part of the CRID default. For information about the CRID default, see Section 11.3: *Default and Custom Roles & Permissions*.

    Note: The UD icon can be displayed for the "Default User". This indicates the CRID default is currently set to the USPS (system) default permissions.
- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).

- To remove a permission, click the delete icon in the **Action** column. Click **Yes** when prompted to confirm that you want to delete the permission.

  Note:

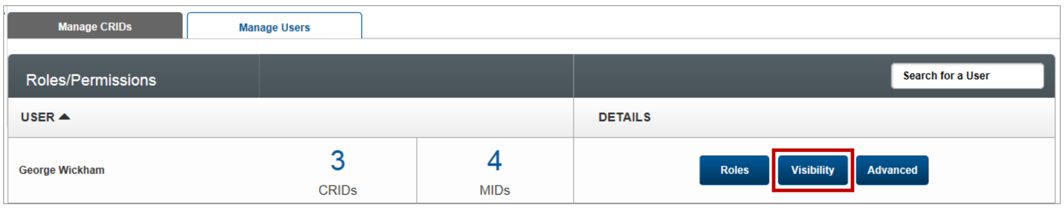
  – You can only remove one permission at a time.

  – IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. You cannot remove these permission assignments; therefore, the delete icon is not available for these users.

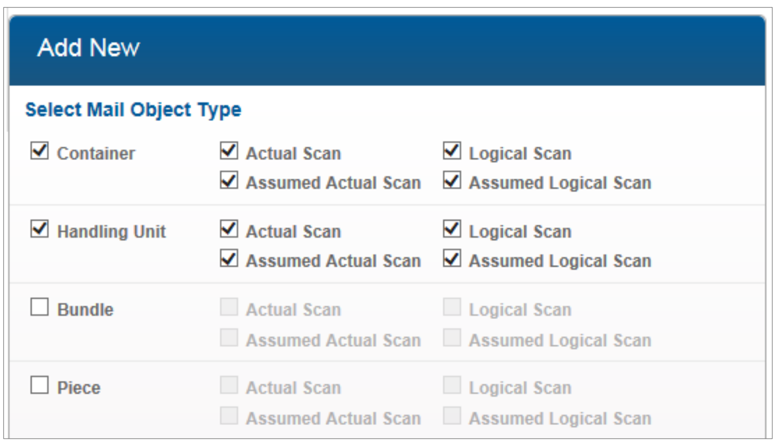
11.4.2.5 Assign Permissions

To assign a permission, follow these steps:

1. On the **Manage Users** tab, find the user whose permissions you would like to manage, and click **Visibility** in that user's row.



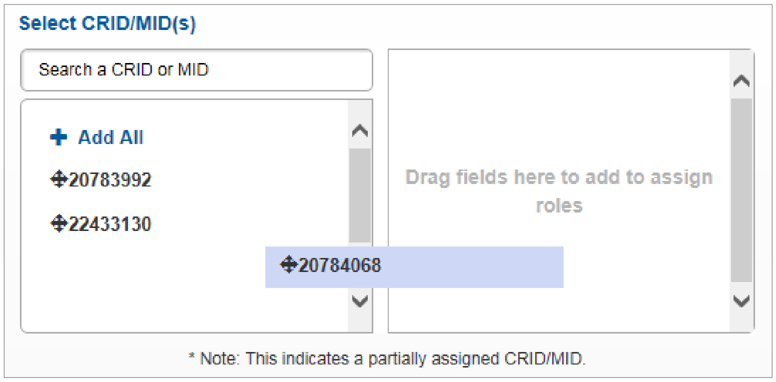
2. Select one or more mail object type(s) and one or more handling event type(s).



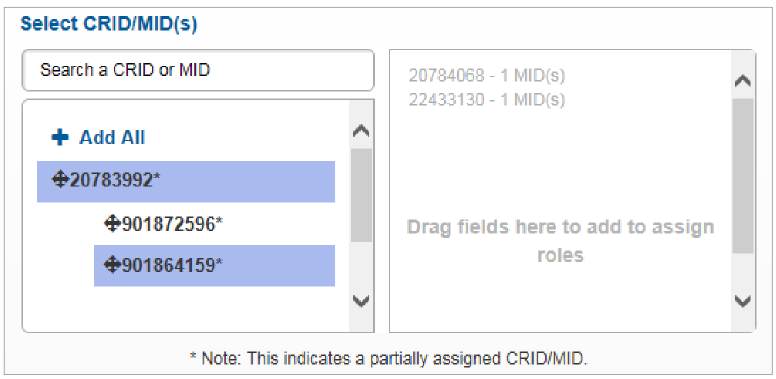
3. When finished, click **Next**.
4. Select the CRID(s), MID(s), and/or routing code(s) to provide visibility of:

   - To add a CRID-level permission, find the CRID on the left side of this section. Drag the CRID to the right side.

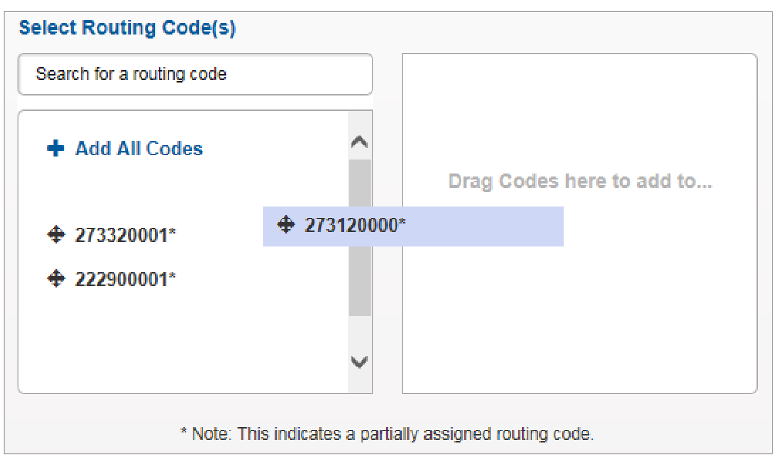
     Note: If the MIDs display below the CRID when you drag the CRID to the right side, MID-level permissions will be created for the MIDs listed—not a CRID-level permission. To create a CRID-level permission, first collapse the MIDs list by clicking the CRID number. Then, drag the CRID to the right side.



- To add a MID-level permission, click the CRID on the left side of this section. The MIDs display below the CRID. Click to deselect any MIDs for which you do not wish to create a permission. Then, drag the CRID, or one of the MIDs, to the right side.

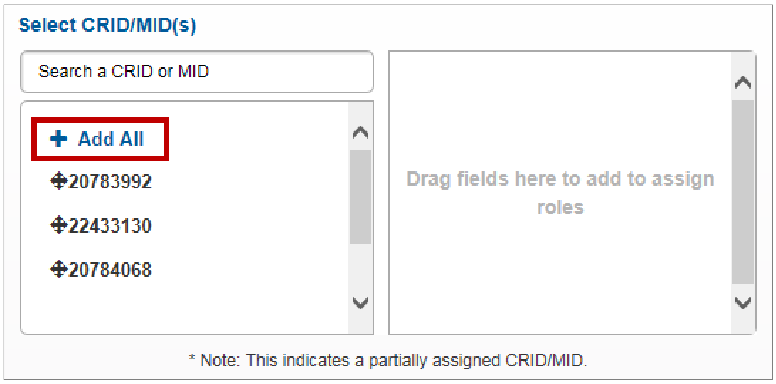


- To add a routing code permission, find the routing code on the left side of this section. Drag the routing code to the right side OR double-click the routing code on the left side to move it to the right side.

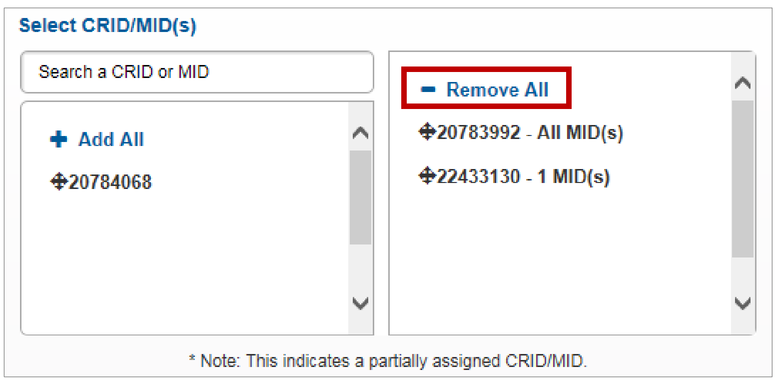


- To add all CRIDs or routing codes, click **Add All** or **Add All Codes**.

  Note: Selecting **Add All** in the Select CRID/MID(s) area creates MID-level permissions for the MIDs available for each displayed CRID. To create CRID-level permissions, you must select each CRID individually.



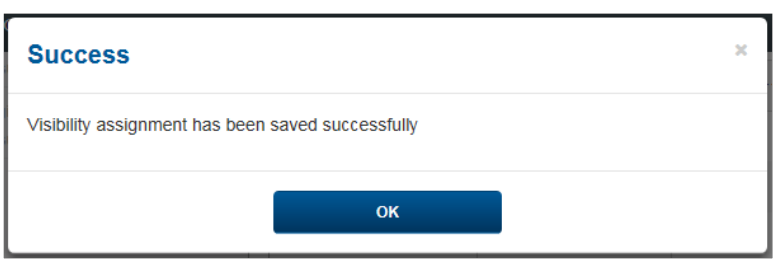
- To remove a CRID or routing code, drag it from the right side to the left side OR double-click the CRID or routing code on the right side to return it to the left side. To remove all of the CRIDs or routing codes, click **Remove All** or **Remove All Codes**.



- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

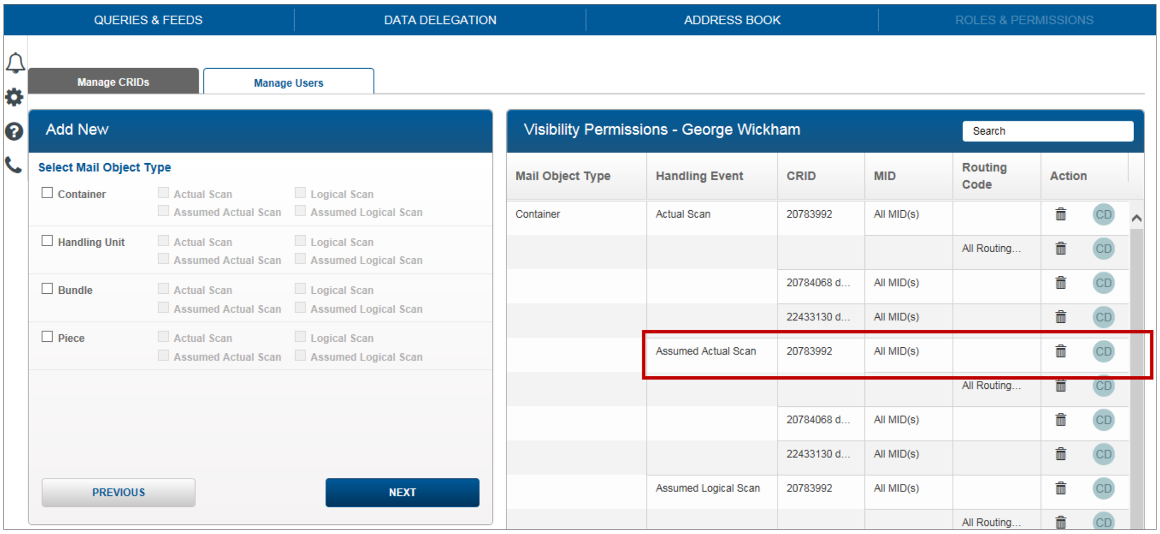
5. When finished, click **Finish**. A window appears confirming the permissions were assigned successfully.
6. To close the window, click **OK** or click the **X** icon. The permission is assigned as selected, and the permission assignment appears in the table to the right.

   Note: If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.



11.4.2.6 Remove Permissions

To remove a permission, click the delete icon in the **Action** column for the appropriate row in the **Visibility Permissions** table. Click **Yes** when prompted to confirm that you want to delete the permission.



Note:

- You can only remove one permission at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: *Reset to CRID or USPS Default*.
- IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. You cannot remove these permission assignments; therefore, the delete icon is not available for these users.

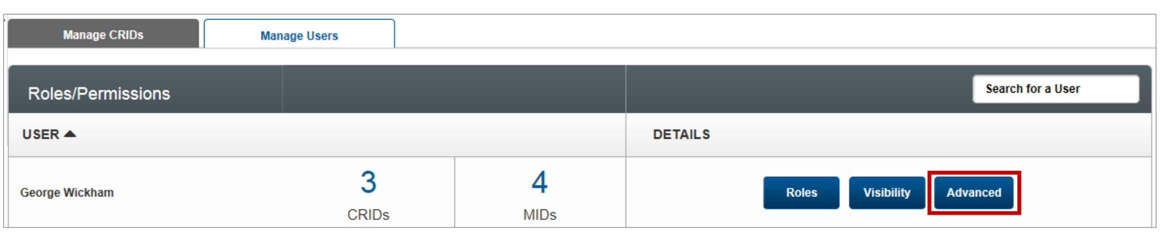
11.4.2.7 Reset to CRID or USPS Default

Note: You cannot reset an IV-MTR BSA or BSA Delegate user to the CRID or USPS default.

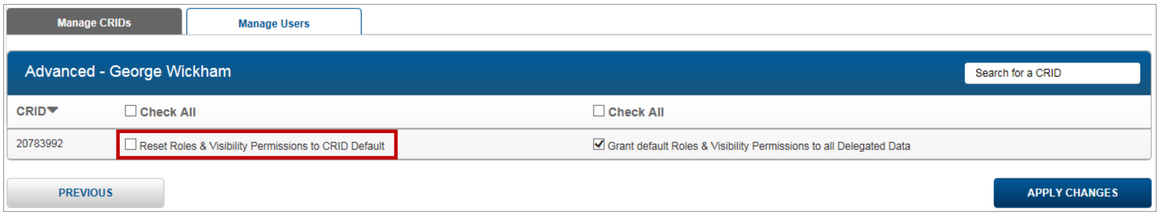
You can reset a user's roles and permissions to the CRID default and reset the CRID default to the USPS (system) default.

To reset a user to the CRID default, follow these steps:

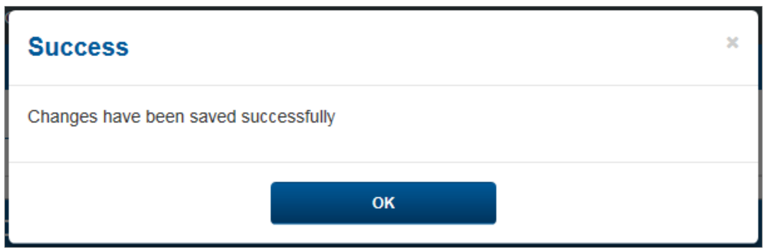
1. On the **Manage Users** tab, find the user whose roles and permissions you would like to reset to the CRID default, and click **Advanced** in that user's row.



2. Check **Reset Roles & Visibility Permissions to CRID Default**.

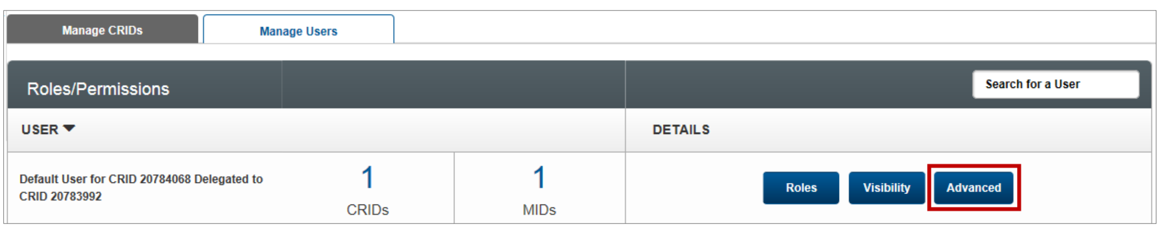


3. Click **Apply Changes**. A window appears confirming the changes were applied successfully.
4. To close the window, click **OK** or click the **X** icon. The application resets the CRID default roles and permissions to the USPS default.

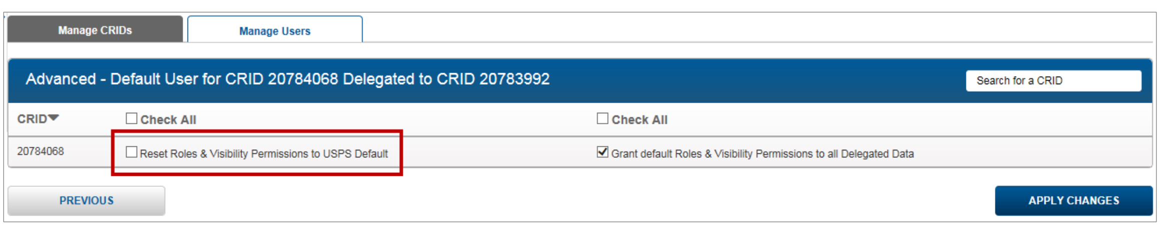


To reset the CRID default to the USPS default, follow these steps:

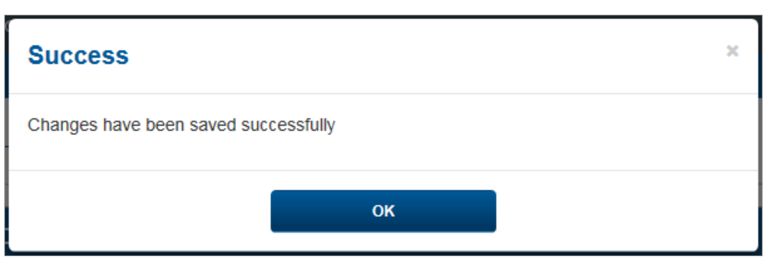
1. On the **Manage Users** tab, find the “Default User” for the CRID whose roles and permissions you would like to reset to the USPS default, and click **Advanced** in that row.



2. Check **Reset Roles & Visibility Permissions to USPS Default**.



3. Click **Apply Changes**. A window appears confirming the changes were applied successfully.
4. To close the window, click **OK** or click the **X** icon. The application resets the CRID default roles and permissions to the USPS default.



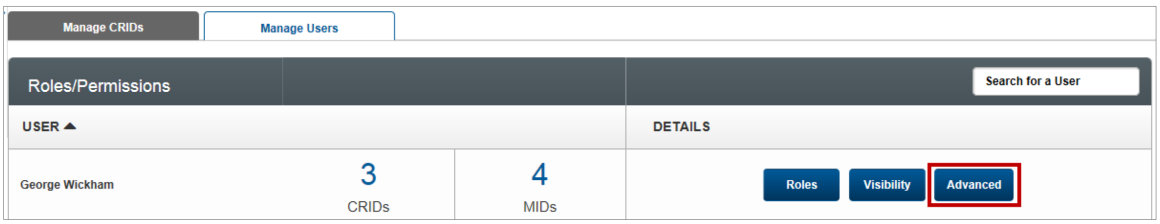
11.4.2.8 *Grant Delegated Data by Default*

If you do not create a CRID default and do not customize an individual user's roles and permissions, all users for the CRID will inherit the USPS default. The USPS default provides all CRID users with visibility of all mail object and handling event types for the CRID and any CRIDs or MIDs delegated to the CRID.

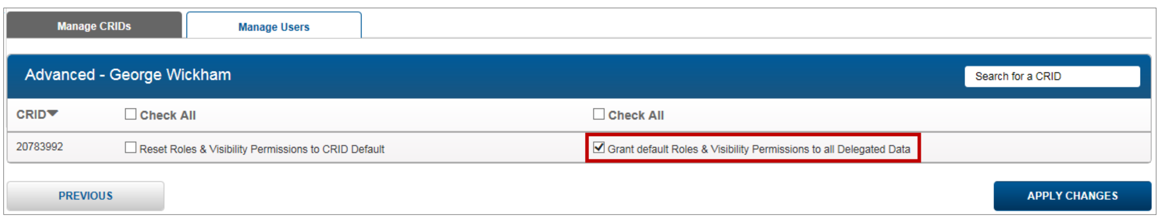
When you create a CRID default or customize an individual user's roles and permissions, the application does **not** automatically provide role functionality and permissions for delegated data. For example, if you have two users for CRID A and you customize permissions such that the first user has visibility permissions for MID A1 and the second user has visibility permissions for MID A2, the users do not automatically have visibility of data delegated to MID A1 and MID A2. You would need to assign visibility permissions for the delegated data to each user. However, within the Roles & Permissions area, you can grant a user access to delegated data by default.

To grant a user access to delegated data by default, follow these steps:

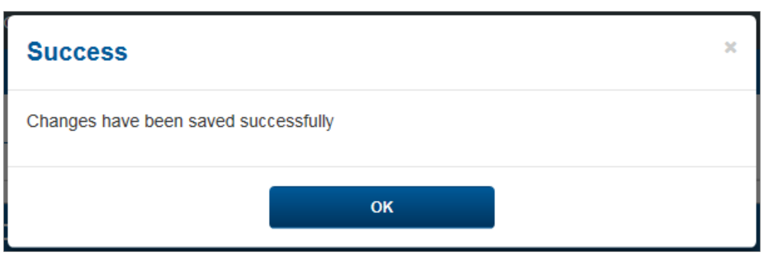
1. On the **Manage Users** tab, find the user, and click **Advanced** in that user's row.



2. Check **Grant default Roles & Visibility Permissions to all Delegated Data**.



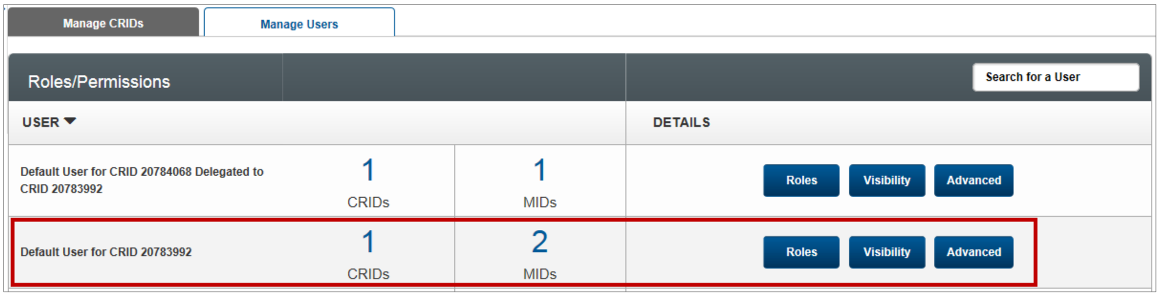
3. Click **Apply Changes**. A window appears confirming the changes were applied successfully.
4. To close the window, click **OK** or click the **X** icon. The user now has visibility permissions for delegated data by default.



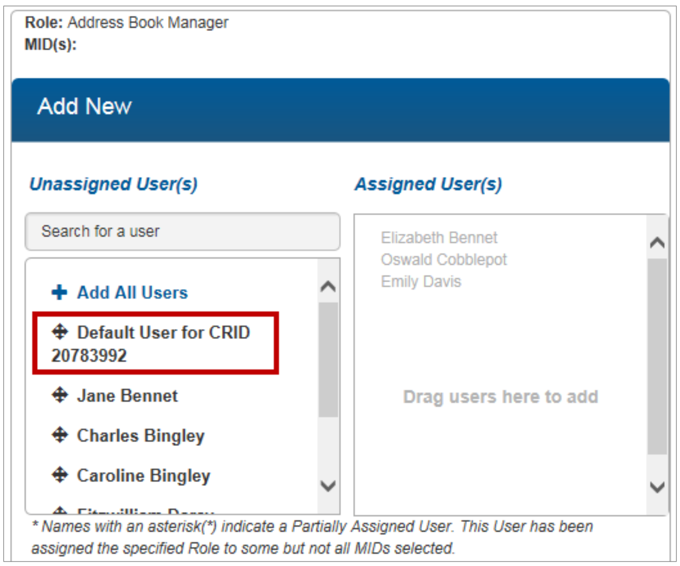
11.4.3 Set the CRID Default

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can create a CRID default that provides users with specific roles and permissions. For example, the CRID default could assign the Address Book Manager role and provide visibility of only one of the MIDs belonging to the CRID. New users granted the IV-MTR service for the CRID inherit the CRID default, if one exists. Otherwise, new users inherit the USPS default roles and permissions.

In IV-MTR, the “Default User” represents the CRID default. You can view, assign, and remove roles and permissions to/from the Default User the same way you would any user.



For example, if you want to set the CRID default to include the Address Book Manager role, you would follow the steps in Section 11.4.1.2: *Assign a Role*. When you get to the step where you select the user(s) to receive the role, you would select the Default User.



The IV-MTR BSA, BSA Delegate or Roles and Permissions Manager can reset the CRID default back to the USPS default as needed. See Section 11.4.2.7: *Reset to CRID or USPS Default* for instructions.

12 Notifications

The IV-MTR application shares notifications with users in two ways:

- Within the application (in-app)
- Email

There are two types of notifications:

1. **Alerts** – notify you that an event has occurred within the application, such as a data delegation rule being created
2. **Actions** – notify you that you are required to take action on something, such as reviewing a data delegation request your CRID has received

This section provides the following information about IV-MTR's notifications:

- Available Notifications
- In-App Notifications
- Email Notifications
- Managing Notification Preferences

12.1 Available Notifications

Notifications are currently available for three areas of the application:

1. Queries & Feeds
2. Data Delegation
3. Roles & Permissions

Information about the notifications for each of these areas, including type and the recipients, is provided in the tables below.

Table 12.1. One-Time Queries Notifications - Alerts

Notification Subject Line	Description	Recipient
One-Time Query File Download Ready		
File [file name] ready for download	File with one-time query results is ready for download.	User who submitted the one-time query

Table 12.2: Data Delegation Notifications - Actions

Notification Subject Line	Description	Recipient*
Data Delegation Request Submitted		
CRID Data Delegation Access Requested	Another CRID has requested visibility for your data. You need to review and approve/deny the request.	Data Delegation Managers of Delegating CRID/MID
** IV-MTR BSA and BSA Delegate users have all user roles; therefore, these users receive all notifications.*		

Table 12.3: Data Delegation Notifications - Alerts

Notification Subject Line	Description	Recipient*
Data Delegation Request Cancelled		
CRID Data Delegation Request Cancellation Notification	Another CRID cancelled their request for visibility of your data. You do not need to take further action.	Data Delegation Managers of Delegating CRID/MID
Data Delegation Request Approved/Denied		
CRID Data Delegation Approved/Denied Notification	A data delegation request you submitted for visibility of another CRID's data has been denied.	Data Delegation Managers of Receiving CRID/MID
New Data Delegation Set Up		
Data Delegation Creation Notification	A new data delegation rule has been created. Your CRID is either the Receiving or Delegating party.	• Subscription Managers and Data Delegation Managers of Receiving CRID/MID • Data Delegation Managers of Delegating CRID/MID
Data Delegation Modified		
Data Delegation Modification Notification	An existing data delegation rule has been modified in some way. Your CRID is either the Receiving or Delegating party.	• Subscription Managers and Data Delegation Managers of Receiving CRID/MID • Data Delegation Managers of Delegating CRID/MID
Data Delegation Deleted		
Data Delegation Removed Notification	An existing data delegation rule has been deleted. Your CRID was either the Receiving or Delegating party.	• Subscription Managers and Data Delegation Managers of Receiving CRID/MID • Data Delegation Managers of Delegating CRID/MID
** IV-MTR BSA and BSA Delegate users have all user roles; therefore, these users receive all notifications*.		

Table 12.4: Roles & Permissions Notifications - Alerts

Notification Subject Line	Description	Recipient
New Role / Permission Granted		
CRID Visibility Assignment Created	You have been assigned visibility permissions as described in the notification	User whose permissions changed
Role / Permission revoked		
CRID Visibility Assignment Deleted Notification	Your visibility permission has been removed as described in the notification	User whose permissions changed

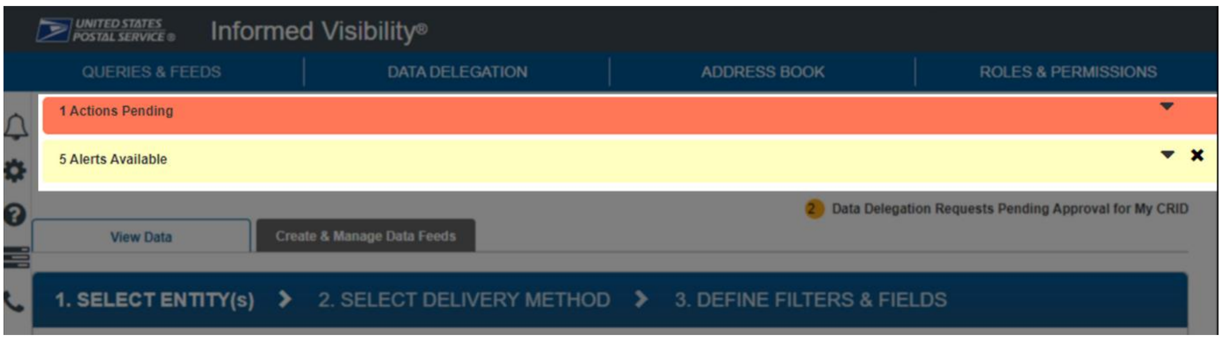
12.2 In-App Notifications

In-app notifications appear in the IV notification area just under the IV navigation bars and in your Notifications Inbox. In-app notifications are available for three weeks, after which they are automatically removed by the system. This section provides information about managing in-app notifications in:

- Notification Bars
- Notifications Inbox

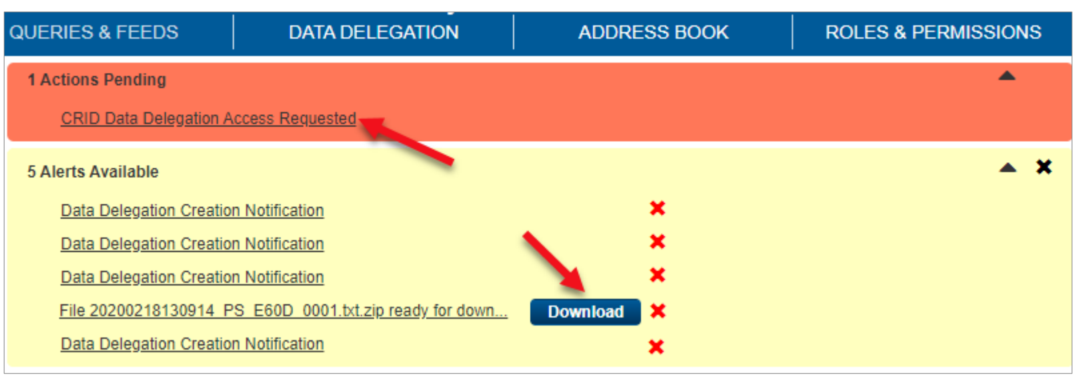
12.2.1 Notification Bars

The IV-MTR notification bar is located right under the blue IV-MTR navigation area at the top of the screen, as shown in the figure below. Action banners are orange while alert banners are yellow.

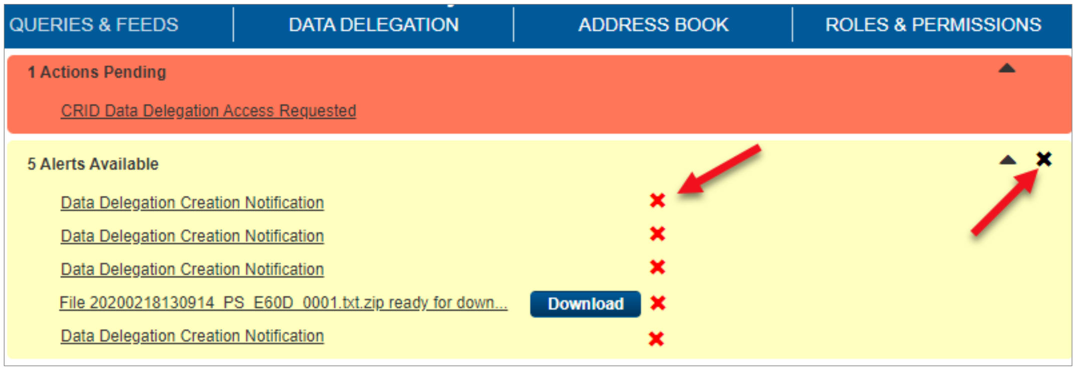


To view and address the individual actions and alerts, expand the banners by clicking the grey arrows on the right side of the banners. The banners remain at the top of the application until:

1. You have addressed the action(s) or alert(s), either through the Notifications Inbox or by:
   - Clicking the hyperlink in the banner
   - Clicking the Download button for applicable one-time query alerts



2. You manually clear the banners (alerts only):
    - To clear an individual alert, click the red **X** on its line
    - To clear all alerts, click the grey **X** in the top right of the alert banner



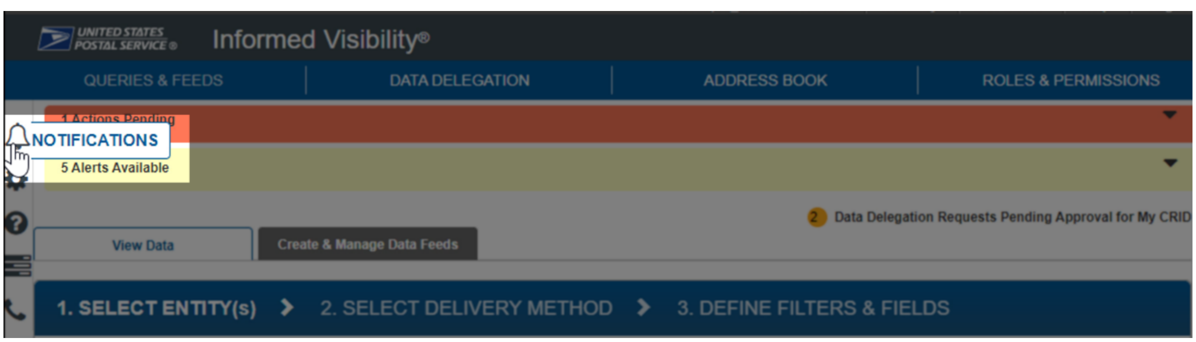
3. Three weeks have passed since the action or alert was created
    - The system auto-deletes all actions and alerts from the application after three weeks, regardless of whether they have been addressed or not
        - Note that requests that generate actions, such as data delegation requests, will still be viewable in the data delegation area of the application

Actions and alerts that have been cleared from the banners can still be viewed in the Notifications Inbox. See the next section for details.

12.2.2 Notifications Inbox

The Notifications Inbox displays all the alerts and actions you have received over the past three weeks.

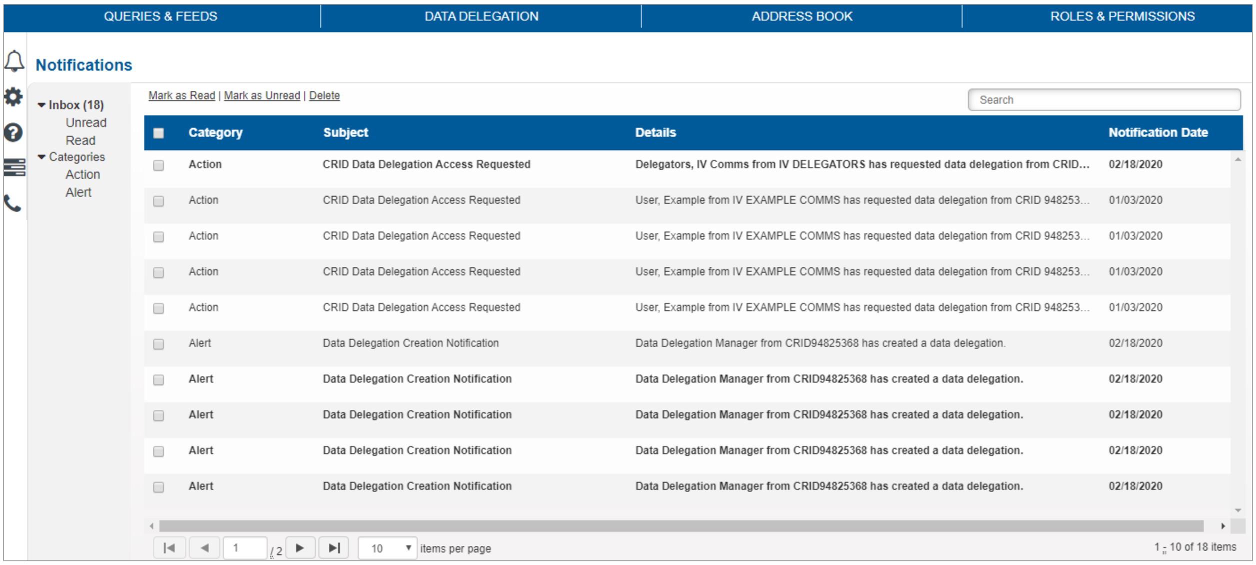
To access the Notifications Inbox, click the **Notifications** (bell) icon on the left widget sidebar.



The Notifications Inbox will appear. Each action or alert is listed as its own entry.

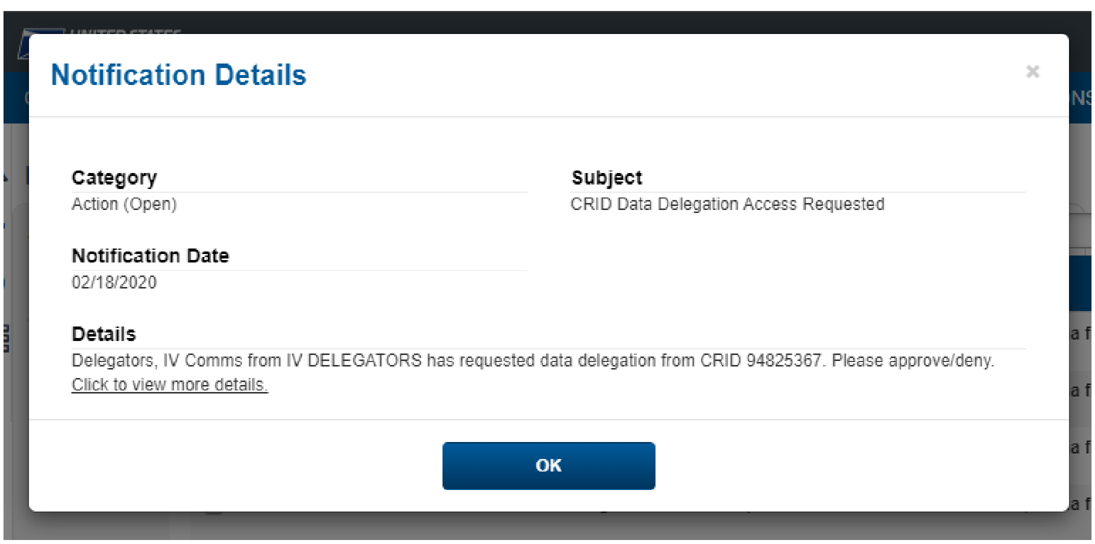
- **Unread** actions and alerts are displayed in bold
- **Read** actions and alerts are displayed in regular font
- **Search** using the search box on the right side of the Inbox
- **Filter** messages using the Inbox and Categories options on the left side of the Inbox
- **Check** boxes to select one or more notifications to delete or mark as read or unread
    - Marking a notification as Read removes it from the Notification Banner

- Actions cannot be marked as Read or deleted



To see details for a notification, click anywhere within the notification line. A Notification Details pops up with the information. Note:

- Opening an alert (or marking it as Read) removes it from the Notification Banner.
- Opening an action does not mark it as read or remove it from the Notification Banner. Action notifications are not removed until the action has been addressed. Follow the instructions in the action to address it.



12.3 Email Notifications

Every in-app notification can also be received via email. Email notifications are sent to the email address associated with your BCG account. By default, users are signed up to receive the following email notifications:

- Data Delegation Request Approved/Denied
- One-Time Query File Download Ready

You can update your email address and manage your email notifications as described in the next section.

12.4 Managing Notification Preferences

This section provides instructions for updating:

- Email Preferences
- Notification Settings

12.4.1 Email Preferences

Important: If you change your preferred email address, you must follow the steps to confirm the change to begin receiving notifications at the updated address.

By default, the application sends email notifications to the email address associated with your BCG account.

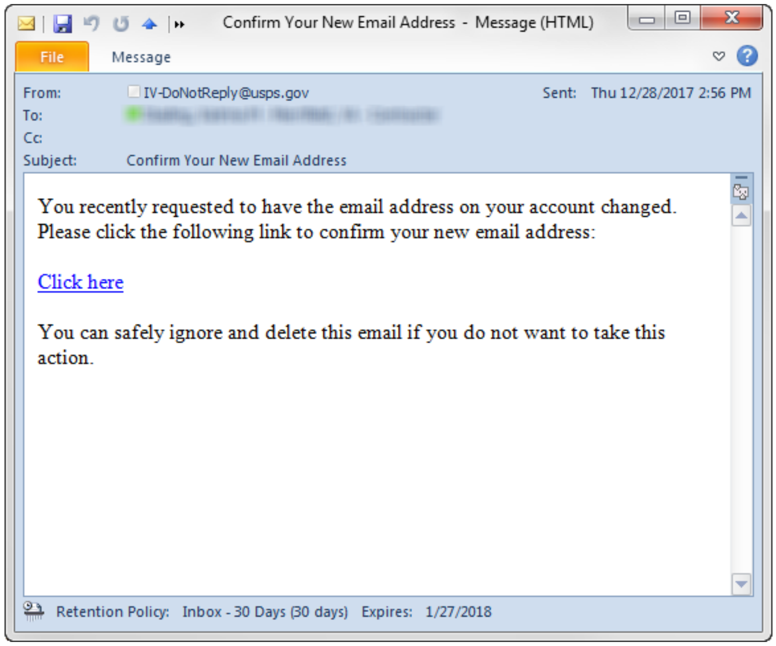
To manage your preferred email address to receive email notifications from the IV-MTR application, follow these steps:

1. Click the **Settings** (gear) widget at the top left of the screen. You go to the Email Preferences screen.
2. Enter the new email address under **Email**.

3. Click **Update**. You receive an email at the new address with instructions to confirm the address.

   Note: You will receive email notifications at the previous address until you confirm the updated address.

4. Click the link in the email to confirm your new email address. A browser window opens to inform you that your email address was successfully confirmed. You are now ready to receive email notifications from IV-MTR at this new email address.

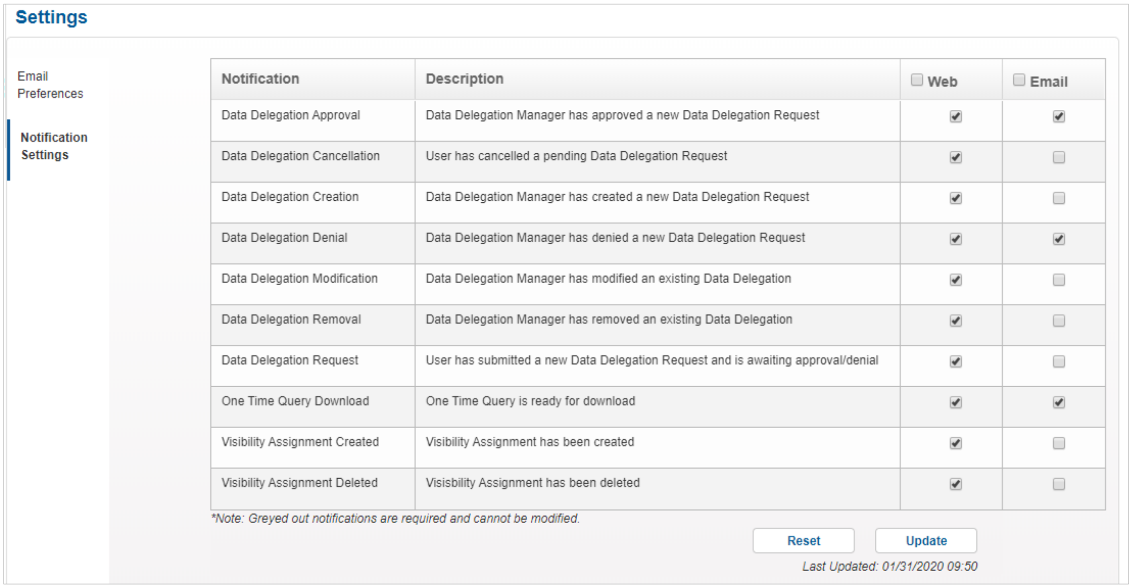


Note: If you do not receive the email to confirm your new address, resend the confirmation email by clicking **Resend Validation Link** on the Email Preferences screen.

12.4.2 Notification Settings

You are able to opt in and opt out of both in-app and email notifications. To manage these settings:

1. Login to your IV-MTR account and click the **Settings** (gear) widget at the top left of the screen.
2. Click **Notification Settings**.
3. The Notification Settings page appears.
    - Checkmarks indicate you are signed up to receive a notification.
    - The timestamp in the bottom right corner of the section provides the last time your preferences were changed.
    - Descriptions of each notification are provided in Section 12.1: *Available Notifications.*



4. Update your preferences as follows:
    - **To opt out of a notification**: Uncheck its checkbox
    - **To opt in to a notification**: Check its checkbox
    - **To opt in or out of all notification**: Check or uncheck the Web and Email boxes in the column header
    - **To reset to default notifications**, click Reset
5. When you are finished making changes, click **Update.**

Updating your notification preferences is now complete. You will begin receiving future updates as chosen.

13 Saved Reports

The IV-MTR application provides the ability to create a saved report. A saved report is a set of entities, mail object type, handling event types, filters, and data fields all together. You can also save portions of a report, such as selected entities or data fields. This allows you to reuse the report or portion of a report throughout the application, so you can perform one-time queries, set up data feeds, and manage data delegation rules more quickly and easily.

The table below describes a saved report and portions of saved reports that can be saved for reuse and where in the IV-MTR application each is available.

Table 13.1: Saved Report Descriptions and Availability

Type	Description	Where Available
Saved Entity	Set of CRIDs, MIDs, and/or routing codes*	One-time query Data feed
Saved Filter	Set of data field filters	One-time query Data feed Request data delegation Approve data delegation Modify data delegation Create data delegation
Saved View	Set of data fields in a specified order	One-time query Data feed Request data delegation Approve data delegation Modify data delegation Create data delegation
Saved Report	Set of entities (CRIDs, MIDs, and/or routing codes*), mail object and handling event types, filters, and data fields	One-time query Data feed

** For a data feed, may also include STIDs*

Saved reports and portions of reports can be public or private:

- **Public** means the saved report is available to all users with the IV-MTR service for the CRID that owns the saved report.
- **Private** means the saved report is only available to the user who created it.
- Please note only IV-MTR BSAs, BSA Delegates, or Report Managers can create, modify, or delete a **public** saved report. For a **private** saved report, only the user who created it can modify or delete it.

See the following sections for additional information about using a saved entity, filter, view, or report.

13.1 Saved Entity

A saved entity is a set of selected CRIDs, MIDs, routing codes, and/or STIDs for which you want to receive mail tracking data. You may use a saved entity on the Select Entity(s) screen when performing a one-time query or creating a data feed.

See the following sections for information about using a saved entity.

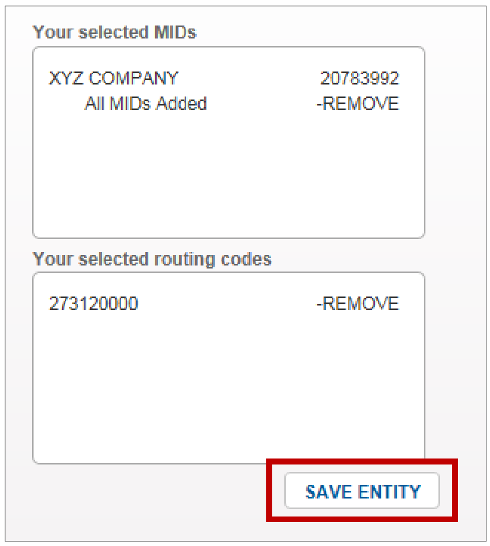
13.1.1 Create a Saved Entity

Important: Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a **public** saved entity. Any user can create a **private** saved entity.

You can create a saved entity from the Select Entity(s) screen when performing a one-time query or creating a data feed.

To create a saved entity, follow these steps:

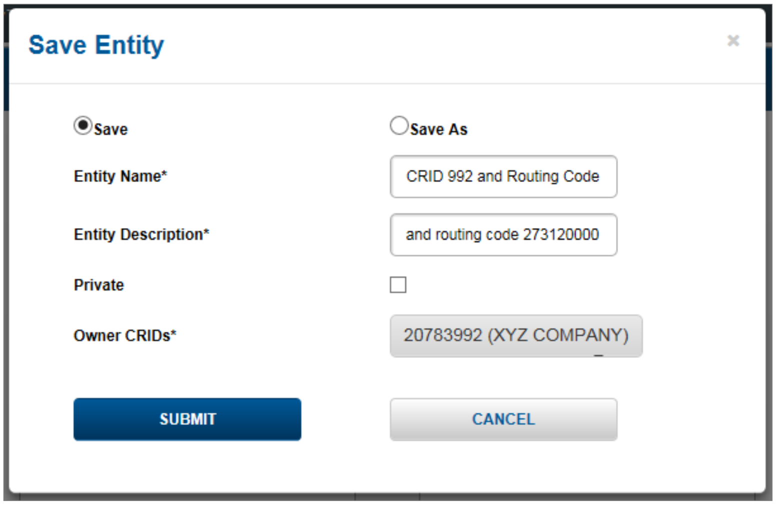
1. On the Select Entity(s) screen, select the CRIDs, MIDs, routing codes, and/or STIDs you wish to include in the saved entity. The selected entities appear under the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.
2. In the lower-right corner, click **Save Entity**. A window opens.



3. In the window, enter a name and description for the saved entity.
4. Select whether to make the saved entity private. If selected, the saved entity will only be available for your personal use. If not selected, the saved entity will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved entity, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved entity, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved entity.

5. Click **Submit**. The saved entity is created. You may continue to perform the one-time query or create the data feed, if desired. To use the saved entity in the future, see Section 13.1.2: *Load a Saved Entity*.



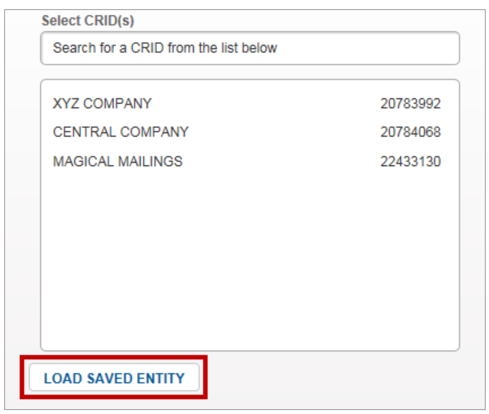
13.1.2 Load a Saved Entity

Important: When you load a saved entity, your visibility permissions filter what is loaded. For example, if a saved entity contains MIDs A and B but you only have visibility permissions assigned for MID A, MID B will not load even though it is part of the saved entity.

You can load a saved entity on the Select Entity(s) screen when performing a one-time query or creating a data feed.

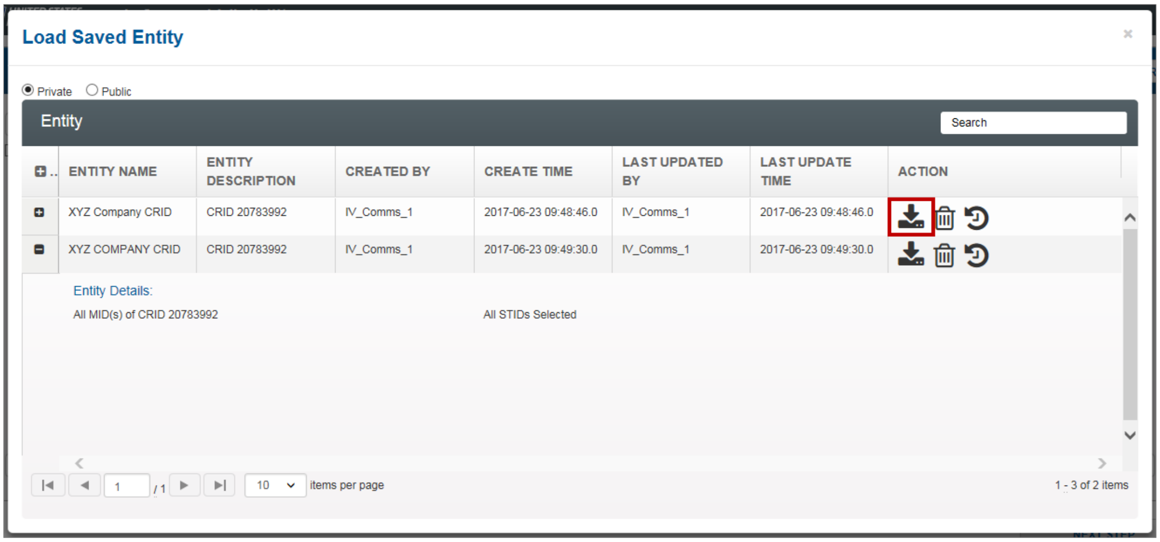
To load a saved entity, follow these steps:

1. On the left side of the Select Entity(s) screen, click **Load Saved Entity**. A window opens.



2. In the window, find the saved entity you wish to load and click the load icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of

the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.



Note:

- Toggle between views of private and public saved entities using the buttons at the top-left of the window. A **private** saved entity is only available for your personal use. A **public** saved entity is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved entity, click the **+** icon to the left of the entity name.
- To associate a saved entity to a data feed, see Section 13.1.5: *Associate a Saved Entity to a Data Feed*.
- To delete a saved entity, click the delete icon. Click **Delete** when prompted to confirm that you want to delete the saved entity. (**Note:** Only the creator can delete a **private** saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved entity.)
- To view the change history for a saved entity, click the view log icon.

13.1.3 Modify a Saved Entity

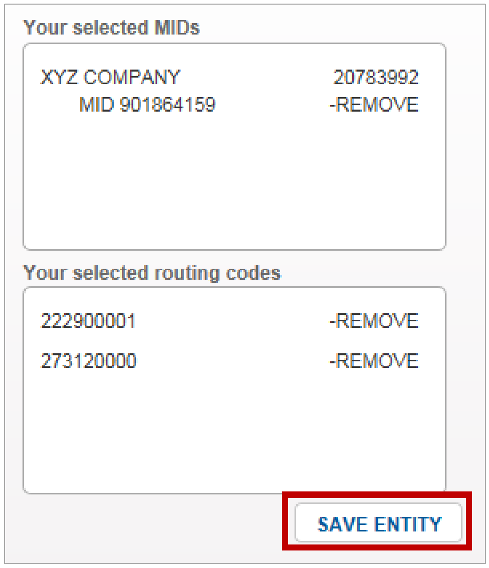
Important:

- Only the creator can modify a **private** saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a **public** saved entity.
- For instructions to modify a saved entity that is associated to a data feed, see Section 13.1.6: *Update a Saved Entity Associated to a Data Feed*.

To change the selected entities or other settings for a saved entity, follow these steps:

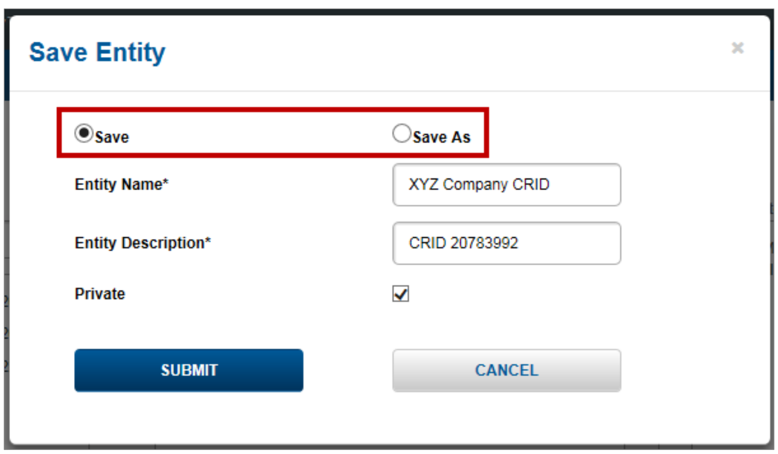
1. On the Select Entity(s) screen for a one-time query or data feed, follow the instructions in Section 13.1.2: *Load a Saved Entity* to load a saved entity.

2. Make the desired changes such that the entities you wish to save appear under the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.
3. In the lower-right corner, click **Save Entity**. A window opens.



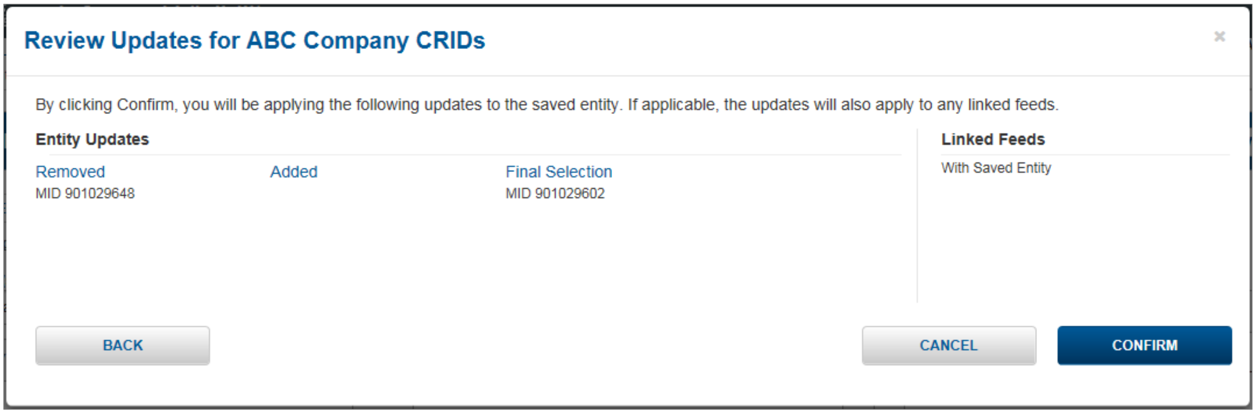
4. In the window, select **Save** to overwrite the existing saved entity OR **Save As** to create a new, separate saved entity.

   Note: If you select **Save As**, you cannot use the same Entity Name as an existing saved entity. Entity Name is case-sensitive. For example, “Saved Entity A” is different than “saved entity a”.



5. Make any necessary changes to the saved entity settings.
6. To save the changes, click **Submit**.

7. If you selected **Save**, a confirmation window appears. The window displays the entities removed and added, the final selection, and the names of any linked data feeds. To confirm the changes, click **Confirm**. To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.



8. A window appears informing you the update was applied. To close the window, click **OK** OR click the **X** icon.

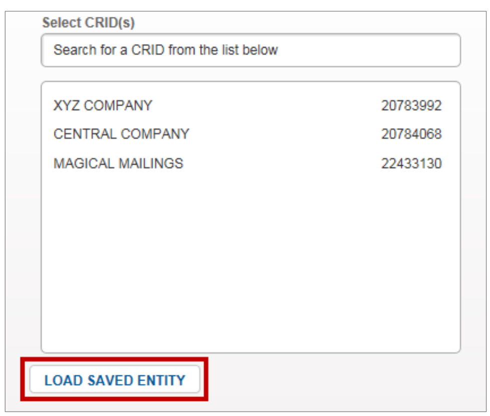
13.1.4 Delete a Saved Entity

Important:

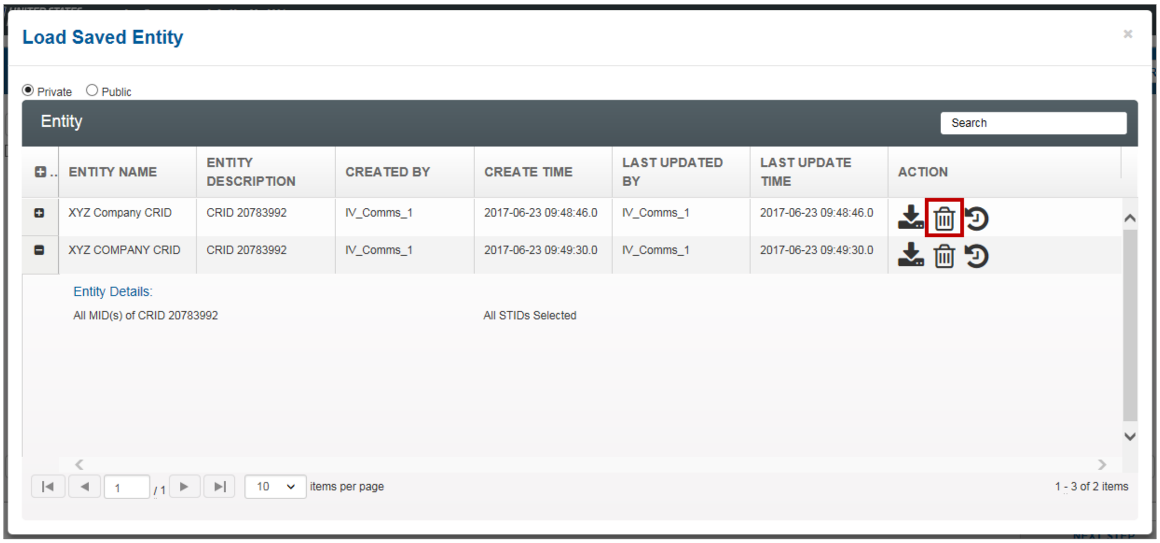
- Only the creator can delete a **private** saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved entity.
- If you delete a saved entity that is associated to a data feed, a "snapshot" of the selected CRIDs, MIDs, and routing codes from the saved entity is applied to the data feed. Once the saved entity is deleted, the association to the data feed no longer exists.

To delete a saved entity, follow these steps:

1. On the left side of the Select Entity(s) screen, click **Load Saved Entity**. A window opens.



2. In the window, find the saved entity you wish to delete and click the delete icon in the **Action** column.



3. Click **Delete** when prompted to confirm that you want to delete the saved entity. The saved entity is deleted.

13.1.5 Associate a Saved Entity to a Data Feed

Important:

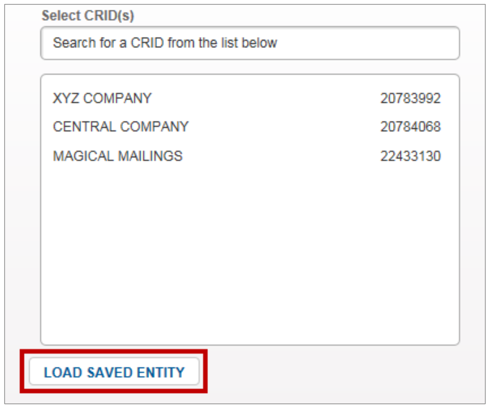
- Only a **public** saved entity can be associated to a data feed.
- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can associate a saved entity to a data feed.
- If you delete a saved entity that is associated to a data feed, a “snapshot” of the selected CRIDs, MIDs, and routing codes from the saved entity is applied to the data feed. Once the saved entity is deleted, the association to the data feed no longer exists.
- A saved entity can only be associated to a data feed if that saved entity has only one owner CRID **and** that CRID is the Subscription Owner CRID for the data feed.

A **public** saved entity can be associated to one or more data feeds. This allows you to update the saved entity and have the selected entities for the associated data feed(s) automatically updated. You may associate a saved entity to a data feed when creating a new data feed or by modifying an existing one.

When creating a new data feed, follow these steps to associate a saved entity to the data feed:

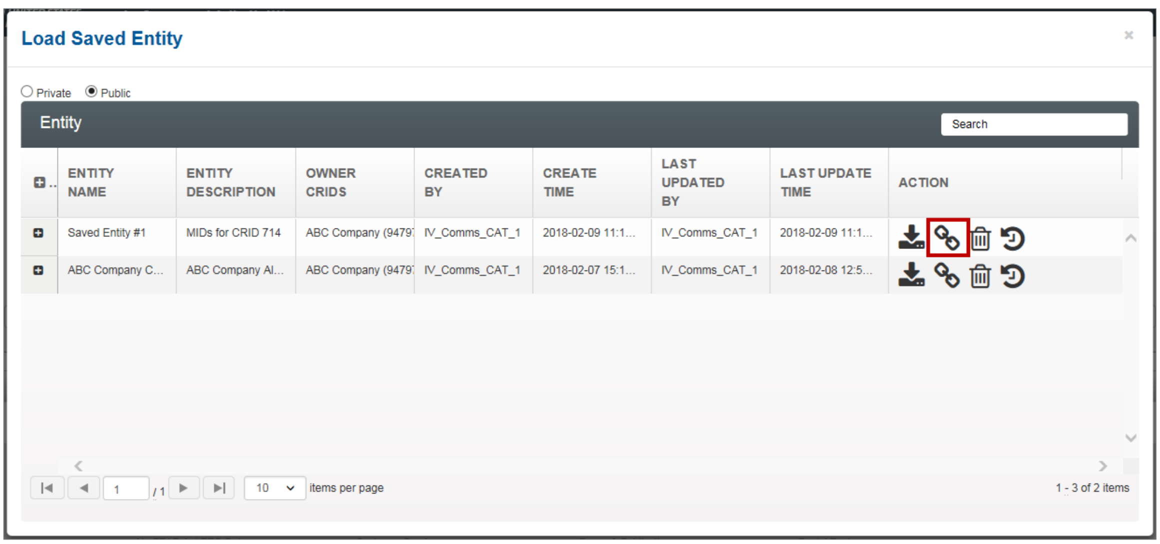
1. Follow the steps in Section 8.1: *Create New Feed* to select the initial feed options.
2. When you reach the Select Entity(s) screen, if the saved entity does not yet exist, follow the steps in Section 13.1.1: *Create a Saved Entity* to create a new public saved entity.

3. On the left side of the screen, click **Load Saved Entity**. A window opens.

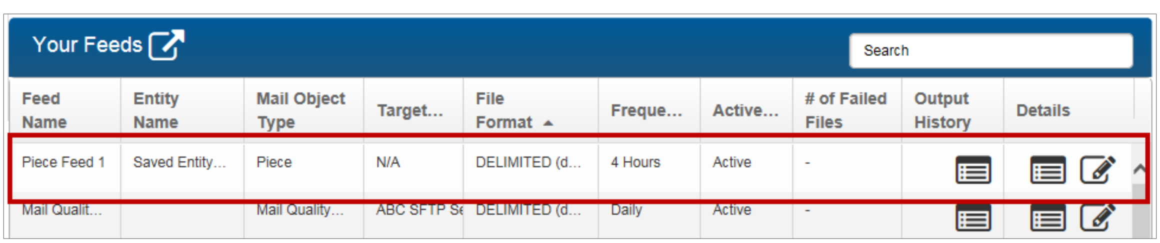


4. Click **Public**.
5. In the window, find the saved entity you wish to associate to the data feed and click the load and associate icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

   Note: You cannot modify the saved entity until you finish creating the data feed. Once the data feed is created, see Section 13.1.6: *Update a Saved Entity Associated to a Data Feed* for instructions to modify the saved entity associated to the data feed.



6. Continue the steps to create the data feed. Once the data feed is created, the **Your Feeds** table displays the new data feed. The associated saved entity displays in the **Entity Name** column.

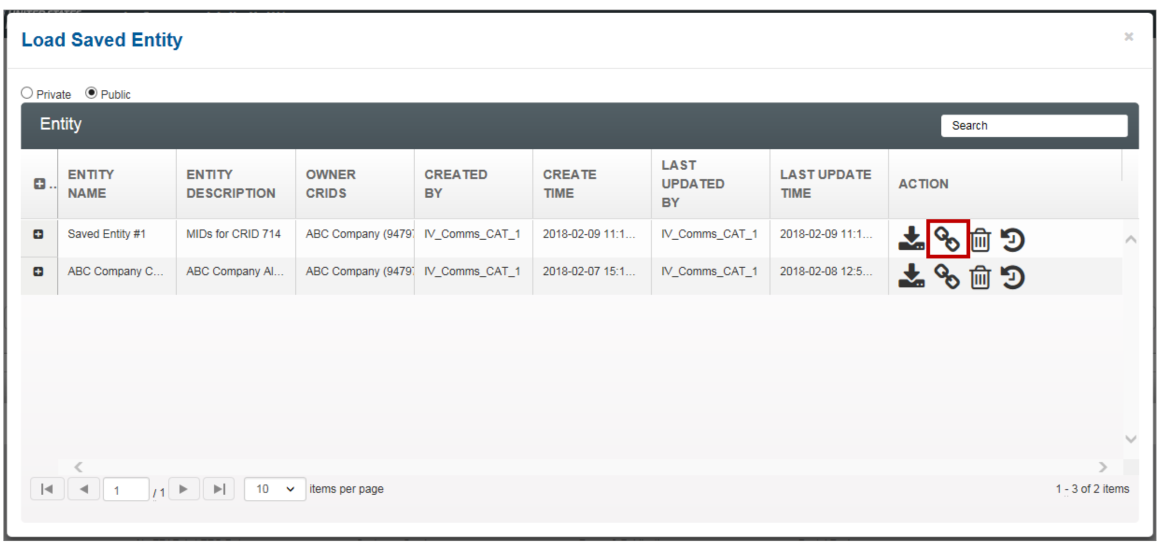


For an existing data feed, follow these steps to associate a saved entity to the data feed:

1. If the saved entity does not yet exist, follow the steps in Section 13.1.1: *Create a Saved Entity* to create a new public saved entity.
2. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.
3. On the left side of the screen, click **Load Saved Entity**. A window opens.

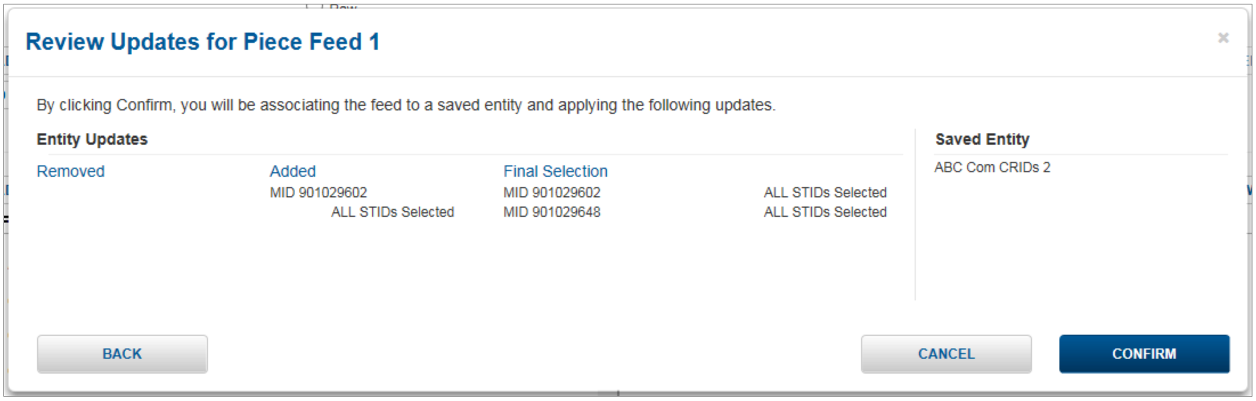
4. Click **Public**.
5. In the window, find the saved entity you wish to associate to the data feed and click the load and associate icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

   Note: You cannot modify the saved entity until you finish updating the data feed. Once the data feed is updated, see Section 13.1.6: *Update a Saved Entity Associated to a Data Feed* for instructions to modify the saved entity associated to the data feed.

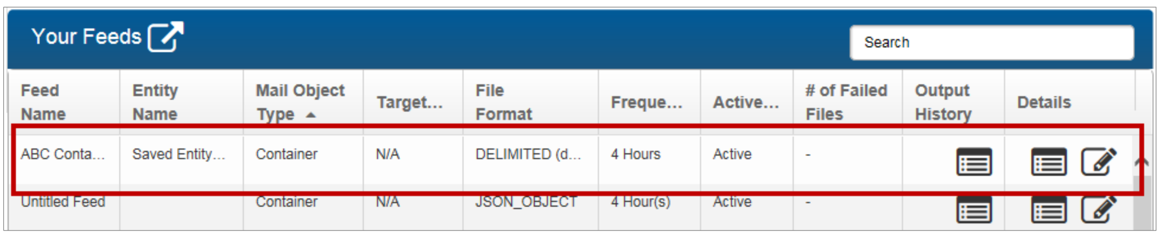


6. Make any other desired updates. Then, scroll to the bottom of the page and click **Update Feed** to commit the changes.

7. A confirmation window appears. The window displays the entities removed and added, the final selection, and the names of any linked data feeds. To confirm the changes, click **Confirm**. To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.



8. A window appears informing you that the data feed was updated. To close the window, click **OK** OR click the **X** icon. The **Your Feeds** table now displays the associated saved entity in the **Entity Name** column.



13.1.6 Update a Saved Entity Associated to a Data Feed

Important:

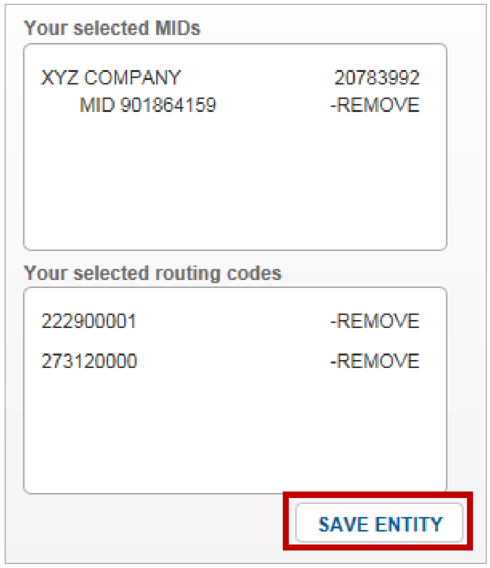
- Only an IV-MTR BSA, BSA Delegate, Subscription Manager, or Report Manager can modify a saved entity associated to a data feed.
- A Report Manager can only modify an associated saved entity from the Select Entity(s) screen when performing a one-time query.

When you update a saved entity that is associated with one or more data feeds, the selected entities for the data feed(s) are updated automatically. You may update an associated saved entity from the Select Entity(s) screen when performing a one-time query, creating a new data feed, or modifying an existing data feed. **Note:** A Report Manager can only modify an associated saved entity from the Select Entity(s) screen when performing a one-time query.

To update an associated saved entity when performing a one-time query or creating a new data feed, follow these steps:

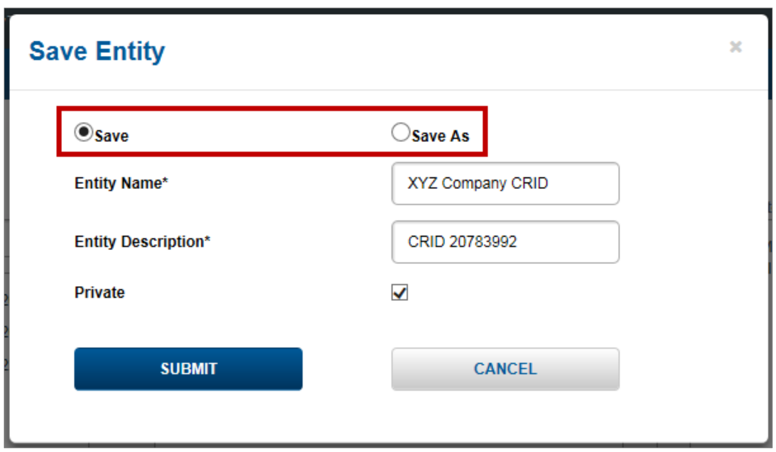
1. On the Select Entity(s) screen for a one-time query or data feed, follow the instructions in Section 13.1.2: *Load a Saved Entity* to load a saved entity.
2. Make the desired changes such that the entities you wish to save appear under the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

3. In the lower-right corner, click **Save Entity**. A window opens.



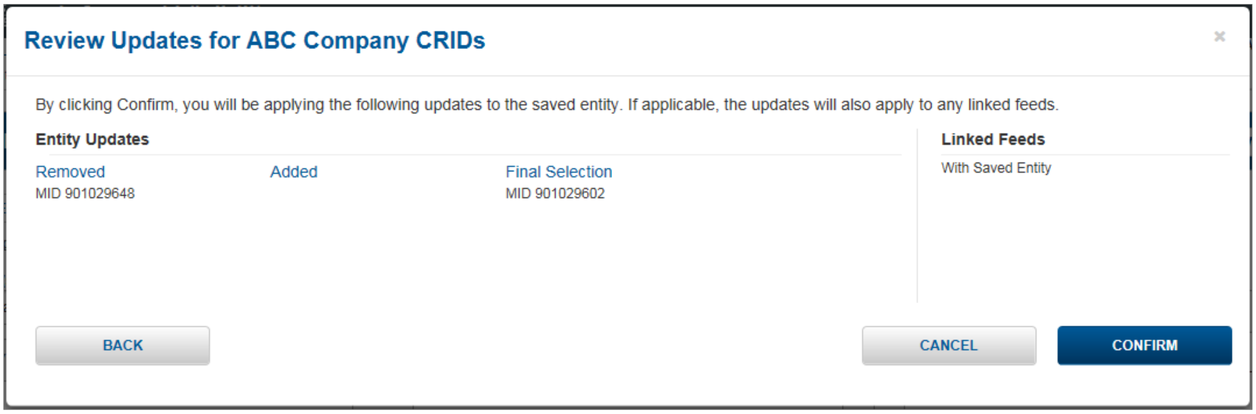
4. In the window, select **Save** to overwrite the existing saved entity OR **Save As** to create a new, separate saved entity.

   Note: If you select **Save As**, you cannot use the same Entity Name as an existing saved entity. Entity Name is case-sensitive. For example, "Saved Entity A" is different than "saved entity a".



5. Make any necessary changes to the saved entity settings.

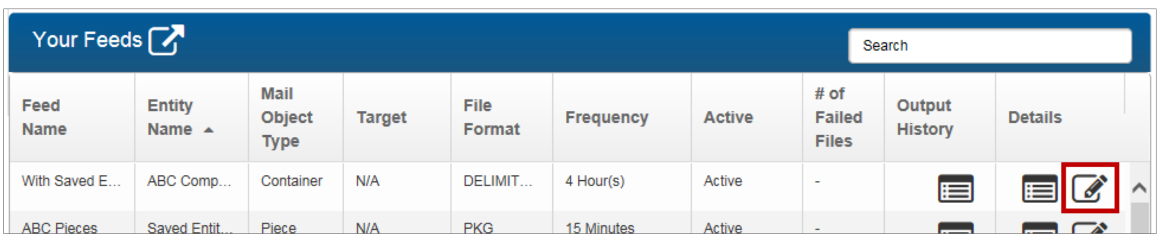
6. To save the changes, click **Submit**.
7. If you selected **Save**, a confirmation window appears. The window displays the entities removed and added, the final selection, and the names of any linked data feeds. To confirm the changes, click **Confirm**. To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.



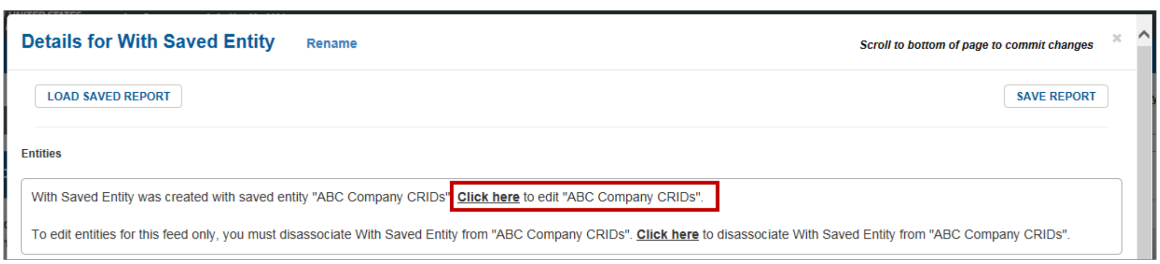
8. A window appears informing you the update was applied. To close the window, click **OK** OR click the **X** icon.

To update an associated saved entity when modifying an existing data feed, follow these steps:

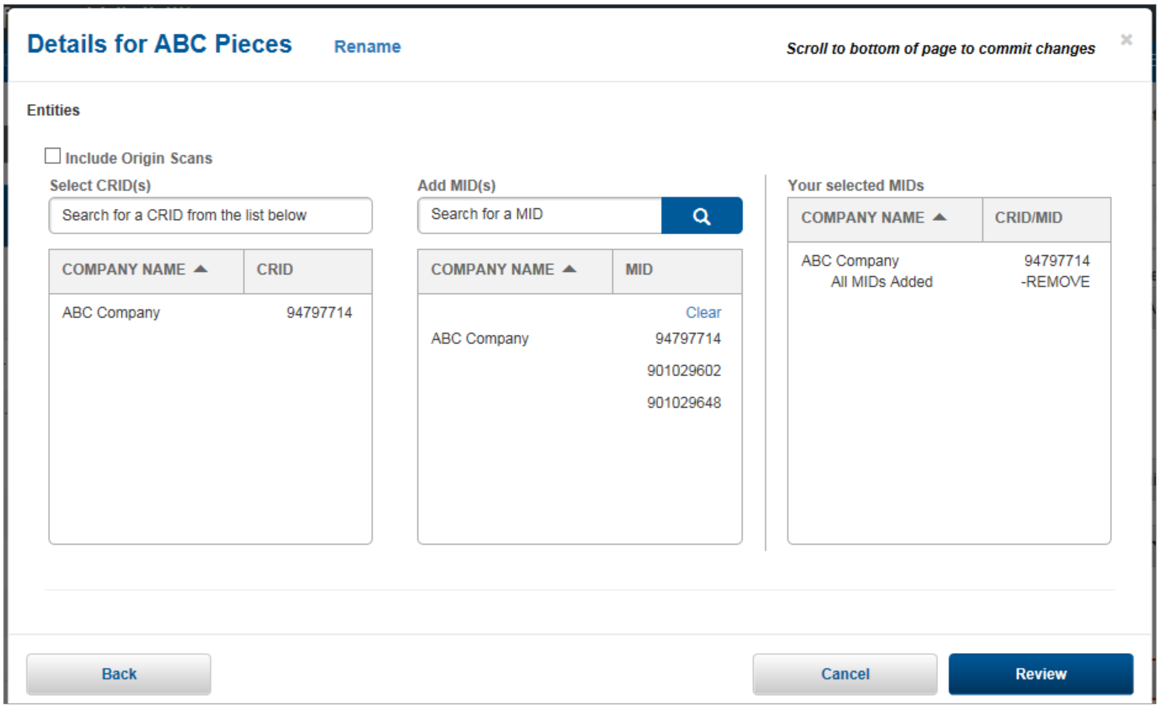
1. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.



2. In the **Entities** section, click where it says **Click here to edit "[saved entity name]"**.

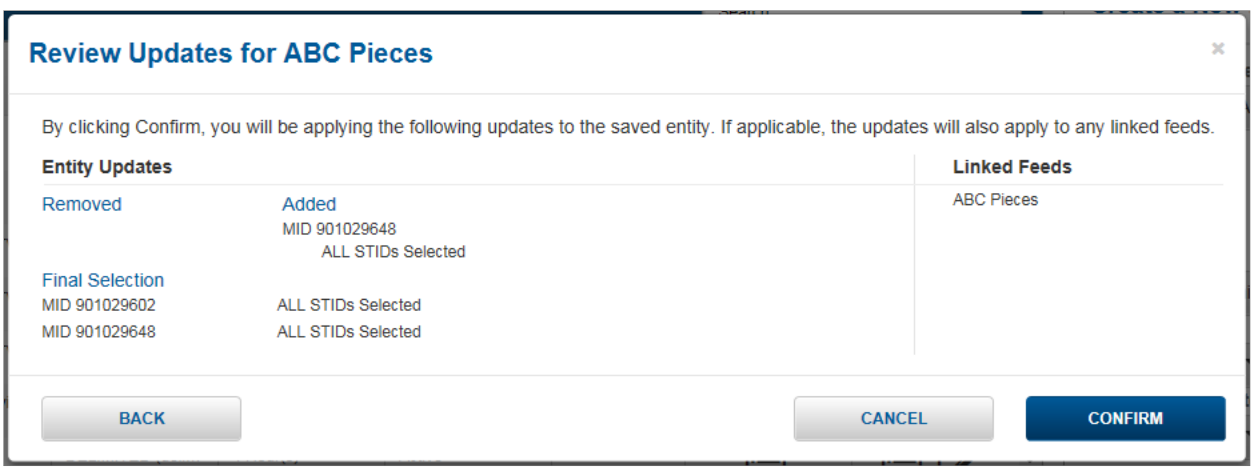


3. Make the desired changes such that the entities you wish to save appear under the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.



4. In the lower-right corner, click **Review**. A window opens.
5. Review the changes to the selected entities, which will be applied to the listed data feed(s). To apply the changes, click **Confirm**. The changes are applied.

   To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.



6. A window appears informing you the update was applied. To close the window, click **OK** OR click the **X** icon.

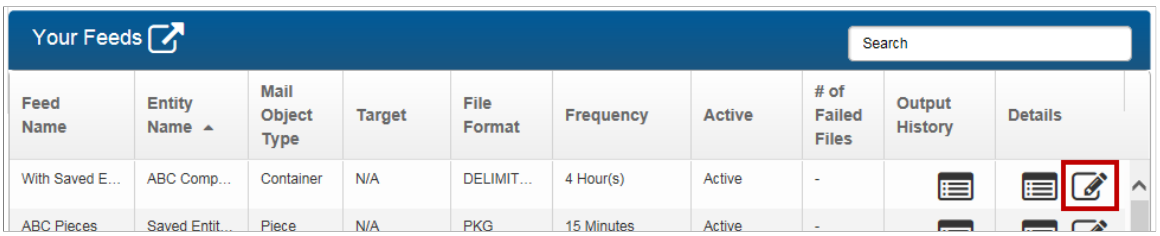
13.1.7 Disassociate a Saved Entity from a Data Feed

Important:

- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can disassociate a saved entity from a data feed.
- When you disassociate a saved entity from a data feed, a “snapshot” of the selected CRIDs, MIDs, and routing codes from the saved entity is applied to the data feed.

If you no longer want a data feed’s selected entities to be automatically updated when you update the associated saved entity, you can disassociate the saved entity from the data feed. Follow these steps:

1. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.



2. In the **Entities** section, click where it says **Click here to disassociate [data feed name] from “[saved entity name]”**.

3. A window appears informing you that the data feed was updated. To close the window, click **OK** OR click the **X** icon. The saved entity is disassociated from the data feed.

13.2 Saved Filter

A saved filter is a set of data field filters that limit the mail tracking data returned in a one-time query or data feed or available in a data delegation rule. You may use a saved filter on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

See the following sections for information about using a saved filter.

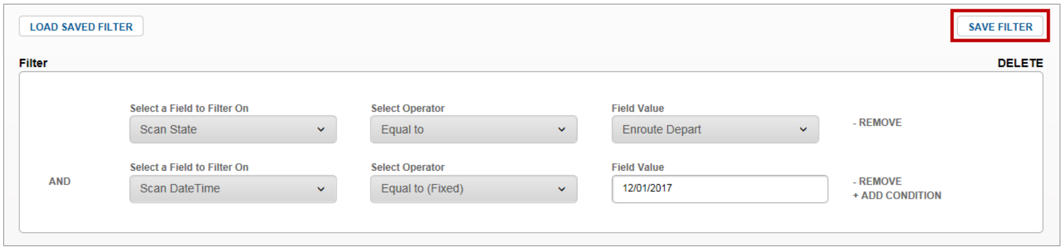
13.2.1 Create a Saved Filter

Important: Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a **public** saved filter. Any user can create a **private** saved filter.

You can create a saved filter from the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

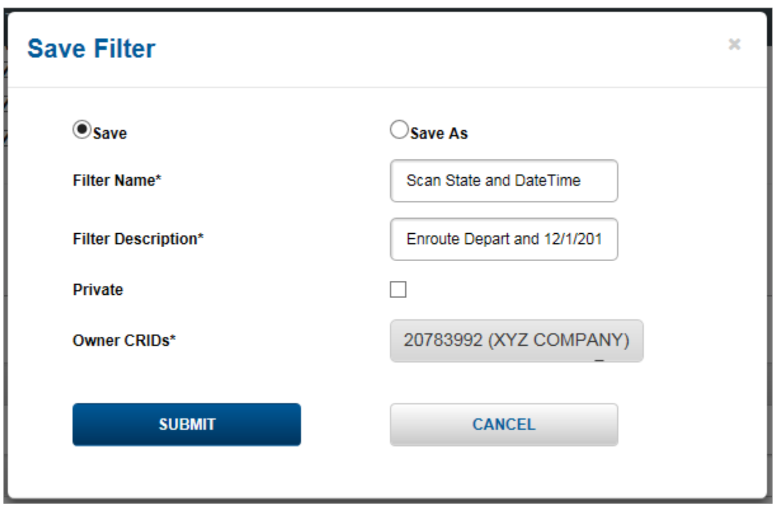
To create a saved filter, follow these steps:

1. On the Define Filters & Fields screen, add the filter(s) you wish to include in the saved filter.
2. In the upper-right of the filter area, click **Save Filter**. A window opens.



3. In the window, enter a name and description for the saved filter.
4. Select whether to make the saved filter private. If selected, the saved filter will only be available for your personal use. If not selected, the saved filter will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved filter, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved filter, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved filter.
5. Click **Submit**. The saved filter is created. You may continue to perform the one-time query, create the data feed, or request/manage/create the data delegation rule, if desired. To use the saved filter in the future, see Section 13.2.2: *Load a Saved Filter*.

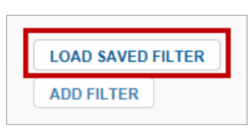


13.2.2 Load a Saved Filter

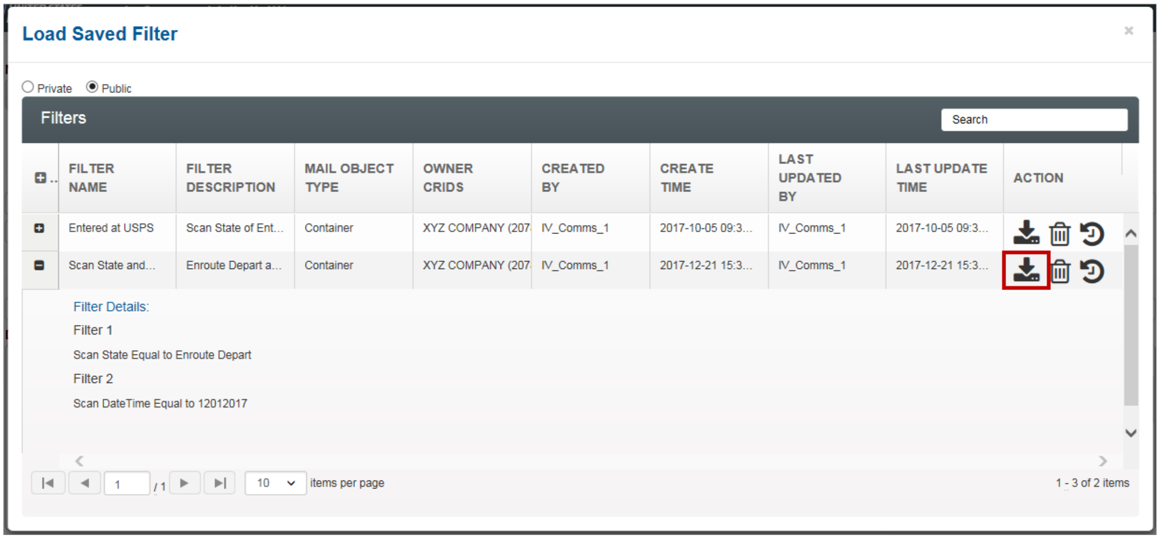
You can load a saved filter on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To load a saved filter, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved Filter**. A window opens.



2. In the window, find the saved filter you wish to load and click the load icon in the **Action** column. The window closes, and the filters that are part of the saved filter populate the filter section on the screen.



Note:

- Toggle between views of private and public saved filters using the buttons at the top-left of the window. A **private** saved filter is only available for your personal use. A **public** saved filter is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved filter, click the **+** icon to the left of the filter name.
- To delete a saved filter, click the delete icon. Click **Delete** when prompted to confirm that you want to delete the saved filter. (**Note:** Only the creator can delete a **private** saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved filter.)
- To view the change history for a saved filter, click the view log icon.

13.2.3 Modify a Saved Filter

Important: Only the creator can modify a **private** saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a **public** saved filter.

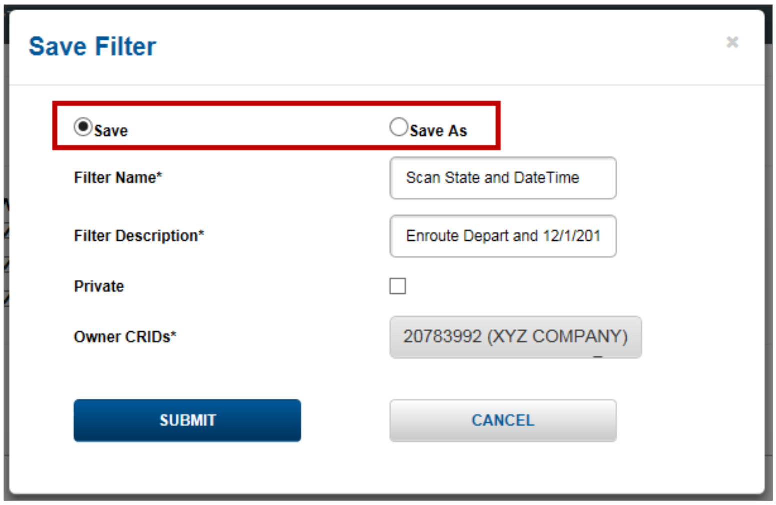
To change the filters or settings for a saved filter, follow these steps:

1. On the Define Filters & Fields screen for a one-time query, data feed, or data delegation rule, follow the instructions in Section 13.2.2: *Load a Saved Filter* to load a saved filter.
2. Make the desired changes to the filter(s).

3. In the upper-right corner, click **Save Filter**. A window opens.

4. In the window, select **Save** to overwrite the existing saved filter OR **Save As** to create a new, separate saved filter.

   Note: If you select **Save As**, you cannot use the same Filter Name as an existing saved filter. Filter Name is case-sensitive. For example, "Saved Filter A" is different than "saved filter a".



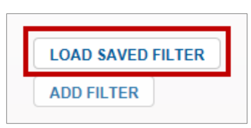
5. Make any necessary changes to the saved filter settings.
6. To save the changes, click **Submit**.
7. If you selected **Save**, a confirmation window appears. To confirm the changes, click **Confirm**. To cancel the changes, click **Cancel**.

13.2.4 Delete a Saved Filter

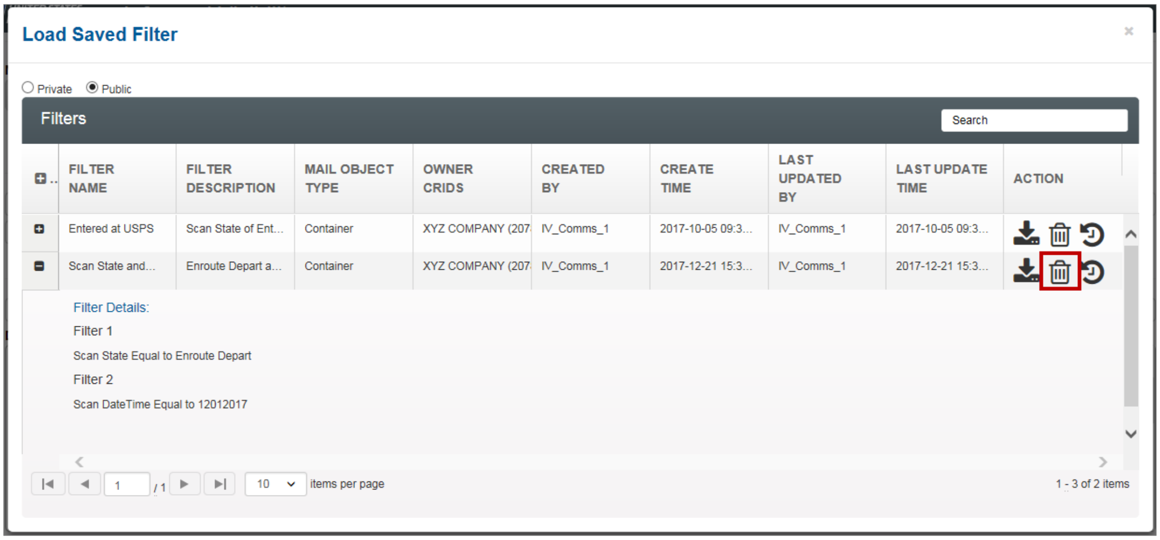
Important: Only the creator can delete a **private** saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved filter.

To delete a saved filter, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved Filter**. A window opens.



2. In the window, find the saved filter you wish to delete and click the delete  icon in the **Action** column.



3. Click **Delete** when prompted to confirm that you want to delete the saved filter. The saved filter is deleted.

13.3 Saved View

A saved view is a set of data fields, in a specified order, that you can receive through a one-time query or data feed. You can also use a saved view can to specify the data fields to share through a data delegation rule. You may use a saved view on some of the Define Filters & Fields screens throughout IV.

See the following sections for information about creating a new saved view and loading an existing one.

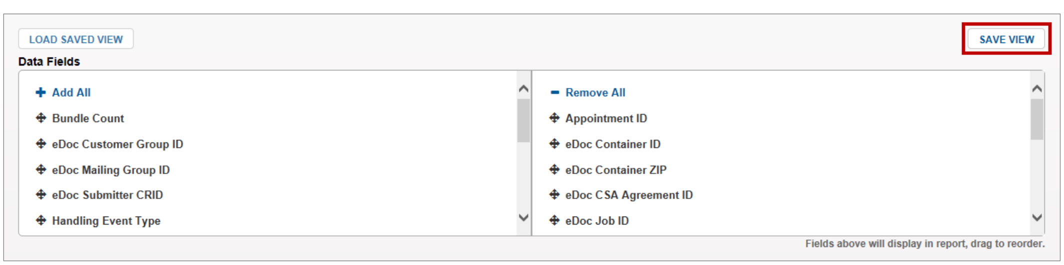
13.3.1 Create a Saved View

Important: Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a **public** saved view. Any user can create a **private** saved view.

You can create a saved view from the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To create a saved view, follow these steps:

1. On the Define Filters & Fields screen, add the data field(s) you wish to include in the saved view and arrange them in your desired order.
2. In the upper-right of the data fields area, click **Save View**. A window opens.

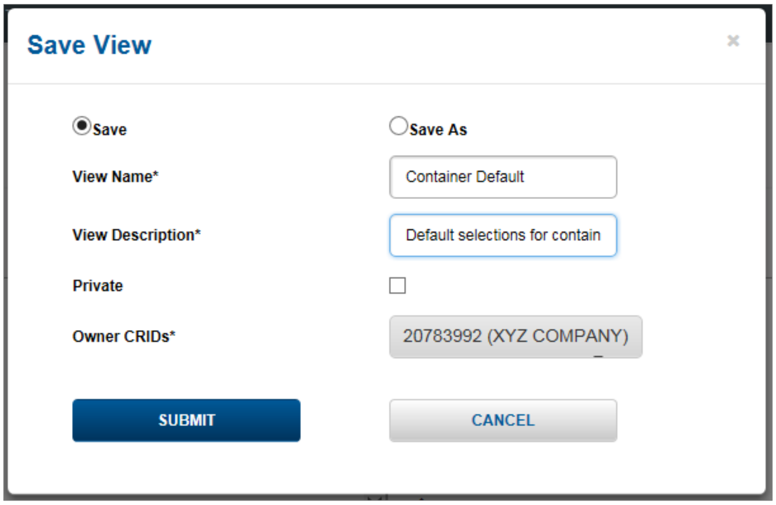


3. In the window, enter a name and description for the saved view.

4. Select whether to make the saved view private. If selected, the saved view will only be available for your personal use. If not selected, the saved view will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved view, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved view, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved view.

5. Click **Submit**. The saved view is created. You may continue to perform the one-time query, create the data feed, or request/manage/create the data delegation rule, if desired. To use the saved view in the future, see Section 13.3.2: *Load a Saved View*.

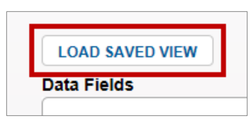


13.3.2 Load a Saved View

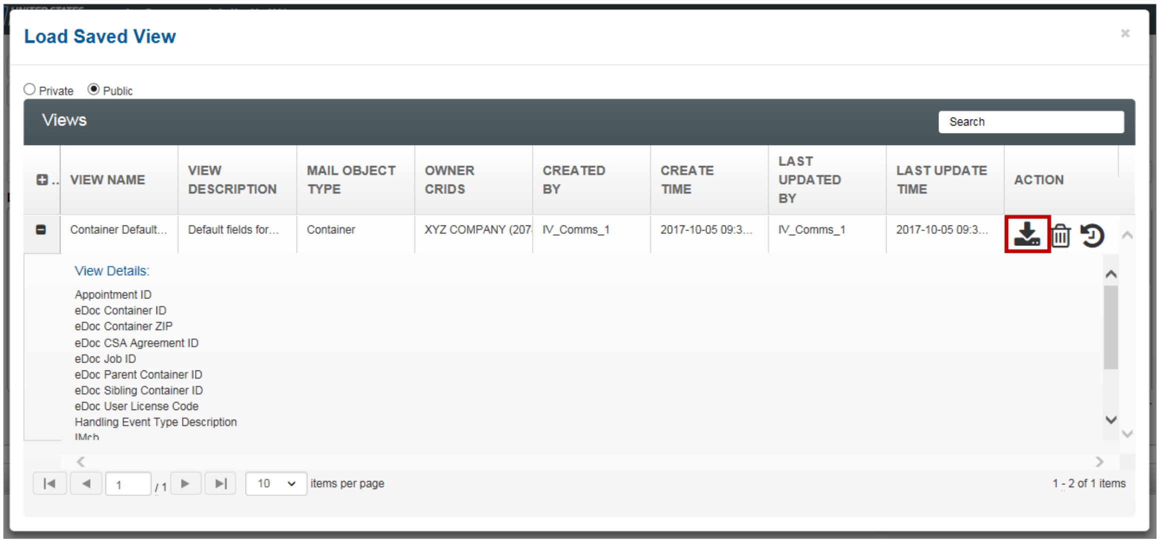
You can load a saved view on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To load a saved view, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved View**. A window opens.



2. In the window, find the saved view you wish to load and click the load icon in the **Action** column. The window closes, and the fields that are part of the saved view populate the data fields section on the screen, in the order specified in the saved view.



Note:

- Toggle between views of private and public saved views using the buttons at the top-left of the window. A **private** saved view is only available for your personal use. A **public** saved view is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved view, click the **+** icon to the left of the view name.
- To delete a saved view, click the delete icon . Click **Delete** when prompted to confirm that you want to delete the saved view. (**Note:** Only the creator can delete a **private** saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved view.)
- To view the change history for a saved view, click the view log icon.

13.3.3 Modify a Saved View

Important: Only the creator can modify a **private** saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a **public** saved view.

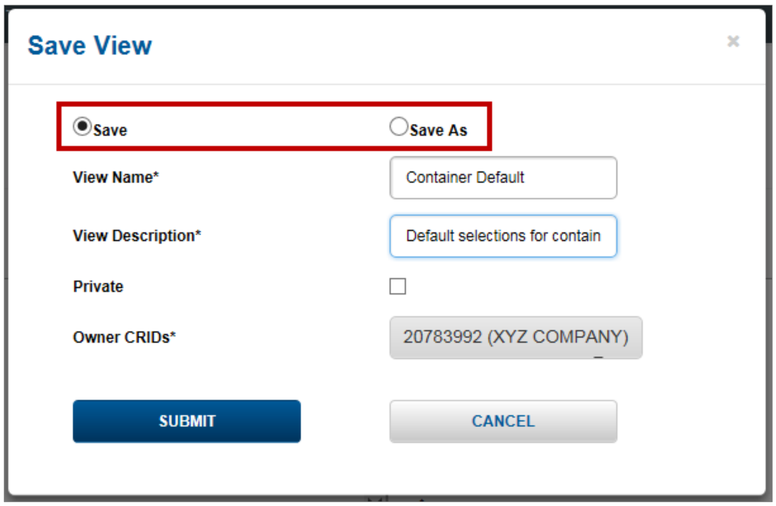
To change the fields or settings for a saved view, follow these steps:

1. On the Define Filters & Fields screen for a one-time query, data feed, or data delegation rule, follow the instructions in Section 13.3.2: *Load a Saved View* to load a saved view.

2. Make the desired changes to the fields and their order.
3. In the upper-right corner, click **Save View**. A window opens.

4. In the window, select **Save** to overwrite the existing saved view OR **Save As** to create a new, separate saved view.

   Note: If you select **Save As**, you cannot use the same View Name as an existing saved view. View Name is case-sensitive. For example, "Saved View A" is different than "saved view a".



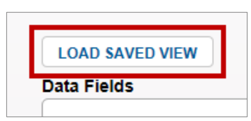
5. Make any necessary changes to the saved view settings.
6. To save the changes, click **Submit**.
7. If you selected **Save**, a confirmation window appears. To confirm the changes, click **Confirm**. To cancel the changes, click **Cancel**.

13.3.4 Delete a Saved View

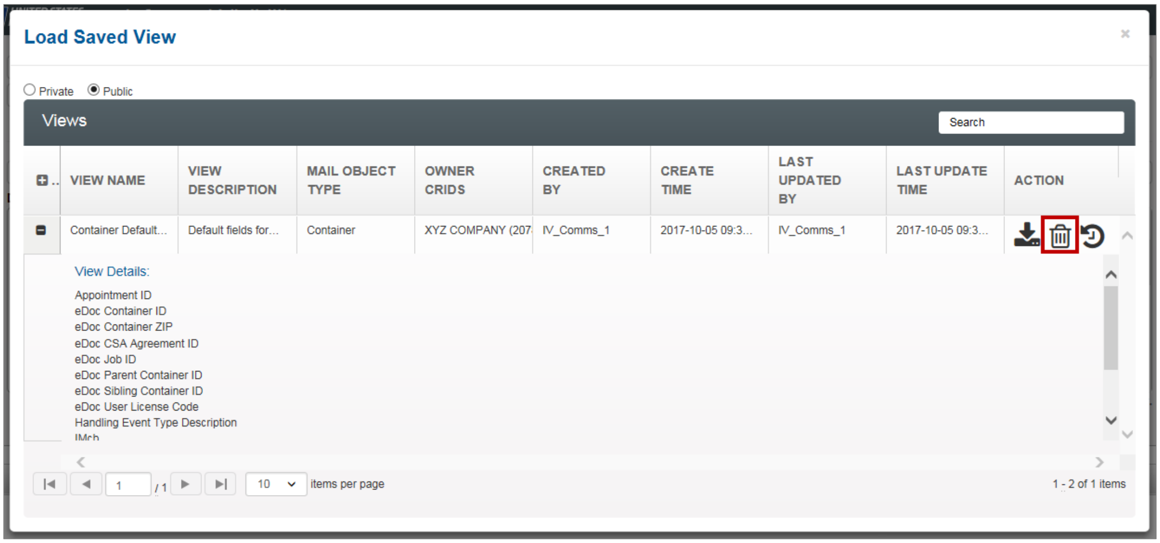
Important: Only the creator can delete a **private** saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved view.

To delete a saved view, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved View**. A window opens.



2. In the window, find the saved view you wish to delete and click the delete  icon in the **Action** column.



3. Click **Delete** when prompted to confirm that you want to delete the saved view. The saved view is deleted.

13.4 Saved Report

A saved report is a set of entities (CRIDs, MIDs, routing codes, and/or STIDs), mail object and handling event types, filters, and data fields for which to receive data through a one-time query or data feed.

See the following sections for information about using a saved report.

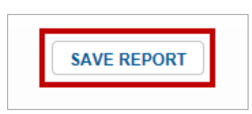
13.4.1 Create a Saved Report

Important: Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a **public** saved report. Any user can create a **private** saved report.

You can create a saved report from the Define Filters & Fields screen when performing a one-time query or creating a data feed.

To create a saved report, follow these steps:

1. Follow the normal process for performing a one-time query or creating a data feed.
2. When you reach the Define Filters & Fields screen, select the mail object type and handling event types, add filters, and select and arrange the data fields to be included in the saved report.
3. In the upper-right corner, click **Save Report**. A window opens.

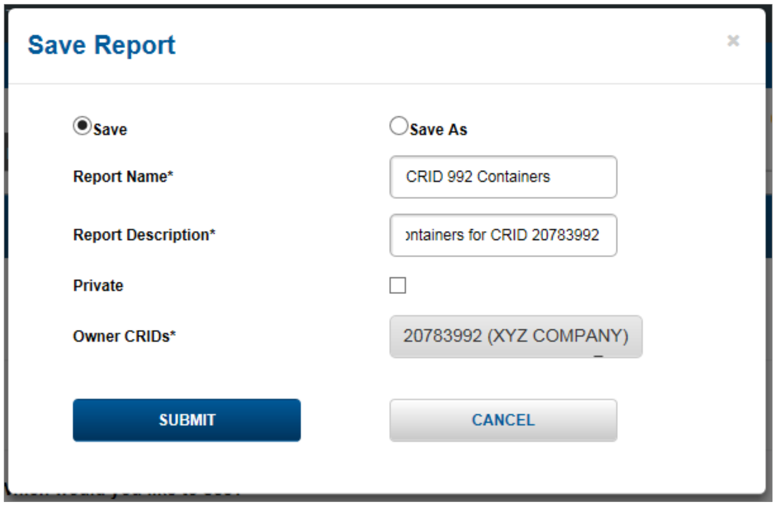


4. In the window, enter a name and description for the saved report.

5. Select whether to make the saved report private. If selected, the saved report will only be available for your personal use. If not selected, the saved report will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved report, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved report, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved report.

6. Click **Submit**. The saved report is created. You may continue to perform the one-time query or create the data feed, if desired. To use the saved report in the future, see Section 13.4.2: *Load a Saved Report*.



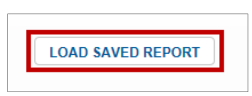
13.4.2 Load a Saved Report

Important: When you load a saved report, your visibility permissions filter what is loaded. For example, if a saved report contains MIDs A and B but you only have visibility permissions assigned for MID A, MID B will not load even though it is part of the saved report.

You can load a saved report on the Select Entity(s) screen or Define Filters & Fields screen when performing a one-time query or creating a data feed.

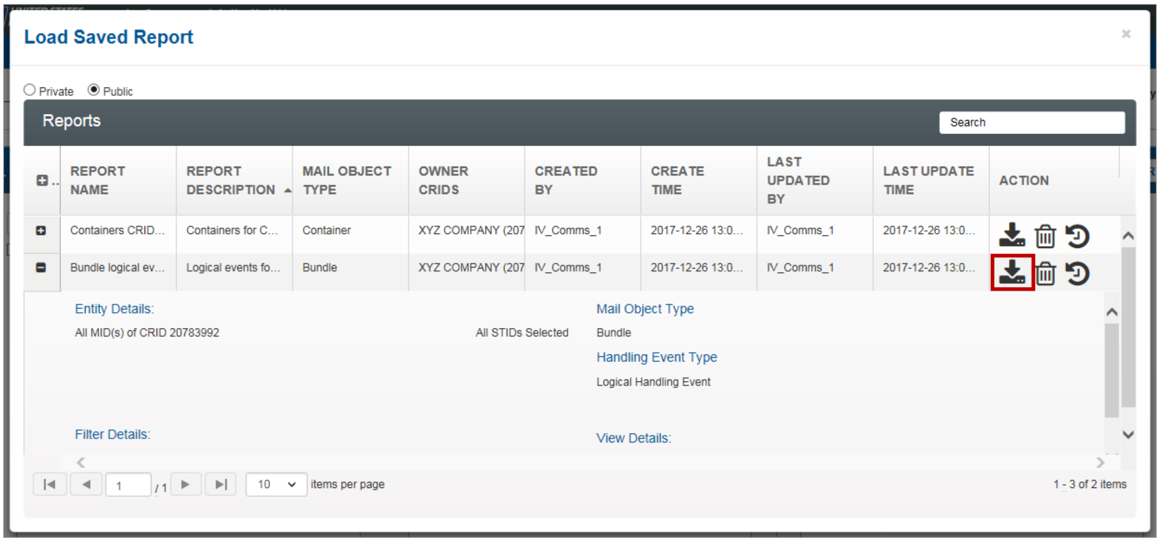
To load a saved report, follow these steps:

1. On the left side of the Select Entity(s) screen or Define Filters & Fields screen, click **Load Saved Report**. A window opens.



2. In the window, find the saved report you wish to load and click the load  icon in the **Action** column. The window closes, and the entities (CRIDs, MIDs, routing codes, and/or STIDs), mail

object and handling event types, filters, and data fields that are part of the saved report load for the query or feed.



Note:

- Toggle between views of private and public saved reports using the buttons at the top-left of the window. A **private** saved report is only available for your personal use. A **public** saved report is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved report, click the **+** icon to the left of the report name.
- To delete a saved report, click the delete icon. Click **Delete** when prompted to confirm that you want to delete the saved report. (**Note:** Only the creator can delete a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved report.)
- To view the change history for a saved report, click the view log icon.

13.4.3 Modify a Saved Report

Important: Only the creator can modify a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a **public** saved report.

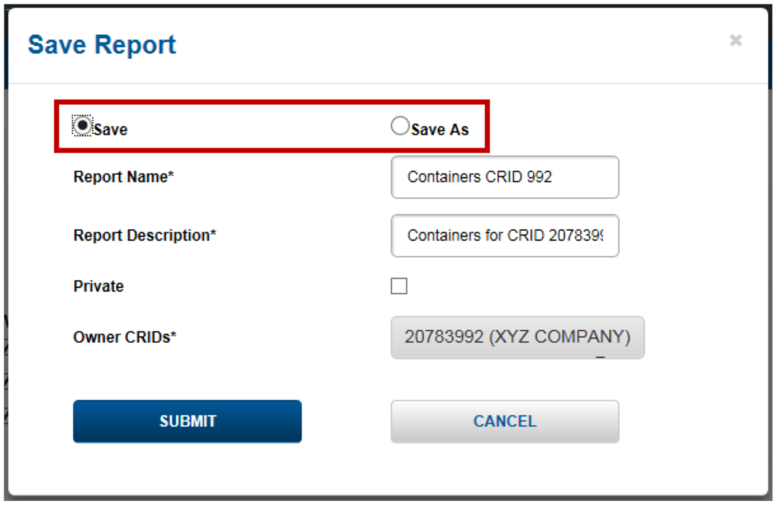
To change the selected entities, mail object or handling event types, filters, data fields or other settings for a saved report, follow these steps:

1. On the Select Entity(s) screen or Define Filters & Fields screen for a one-time query or data feed, follow the instructions in Section 13.4.2: *Load a Saved Report* to load a saved report.
2. Make the desired changes to the selected entities, mail object or handling event types, filters, or data fields.

3. When you reach the Define Filters & Fields screen, click **Save Report** in the upper-right corner. A window opens.

4. In the window, select **Save** to overwrite the existing saved report OR **Save As** to create a new, separate saved report.

   Note: If you select **Save As**, you cannot use the same Report Name as an existing saved report. Report Name is case-sensitive. For example, "Saved Report A" is different than "saved report a".



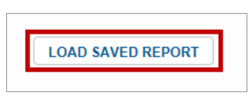
5. Make any necessary changes to the saved report settings.
6. To save the changes, click **Submit**.
7. If you selected **Save**, a confirmation window appears. To confirm the changes, click **Confirm**. To cancel the changes, click **Cancel**.

13.4.4 Delete a Saved Report

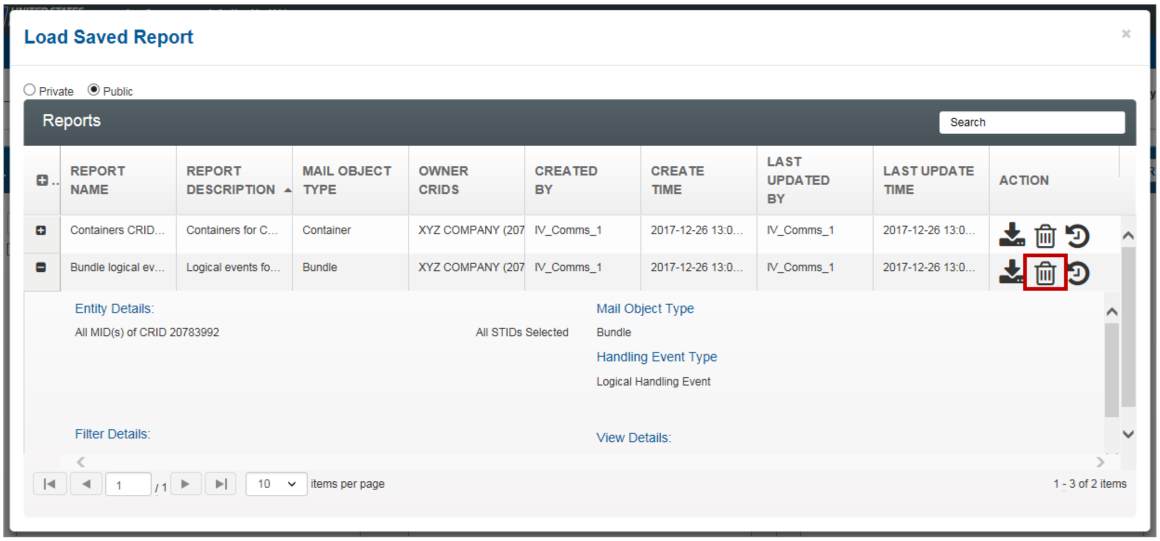
Important: Only the creator can delete a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved report.

To delete a saved report, follow these steps:

1. On the left side of the Select Entity(s) screen or Define Filters & Fields screen, click **Load Saved Entity**. A window opens.



2. In the window, find the saved report you wish to delete and click the delete  icon in the **Action** column.



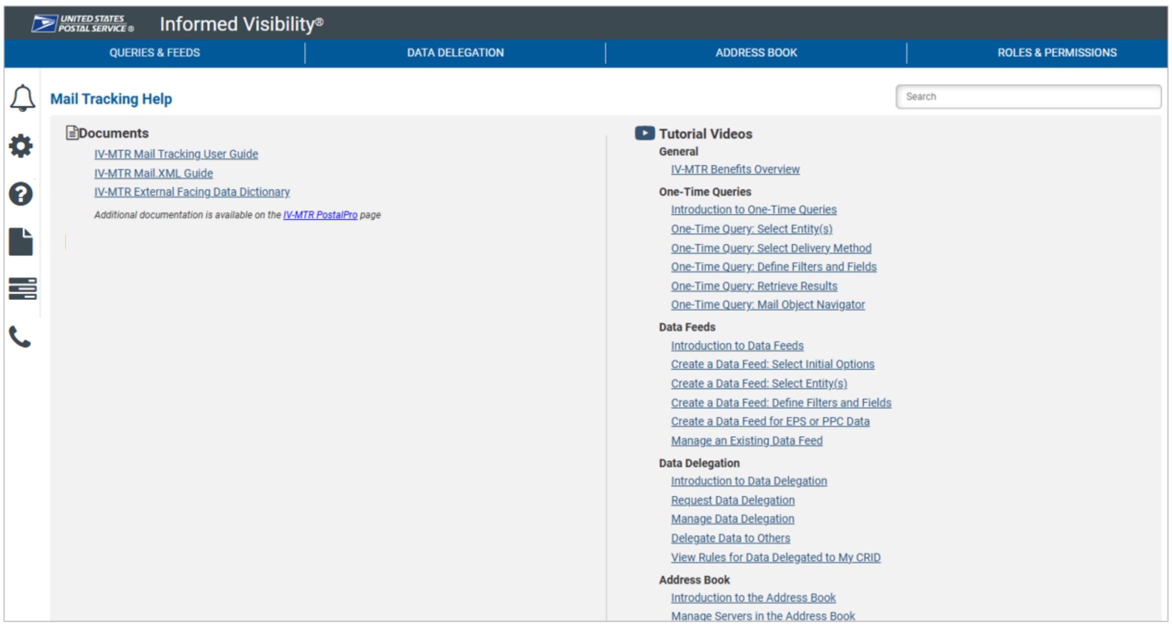
3. Click **Delete** when prompted to confirm that you want to delete the saved report. The saved report is deleted.

14 Mail Tracking Help & Reference Data

Important: The gray bar at the very top of the page provides functionality for the BCG—not the IV-MTR application. The **Help** link in that bar takes you to a support page for the BCG—not the IV-MTR application.

14.1 Mail Tracking Help

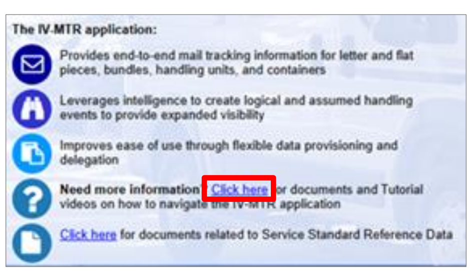
A variety of resources are available to assist you with using the IV-MTR application. To access these resources when you are logged into the application, click the **Mail Tracking Help** (question mark) widget at the top left of the screen. This takes you to the Mail Tracking Help screen.



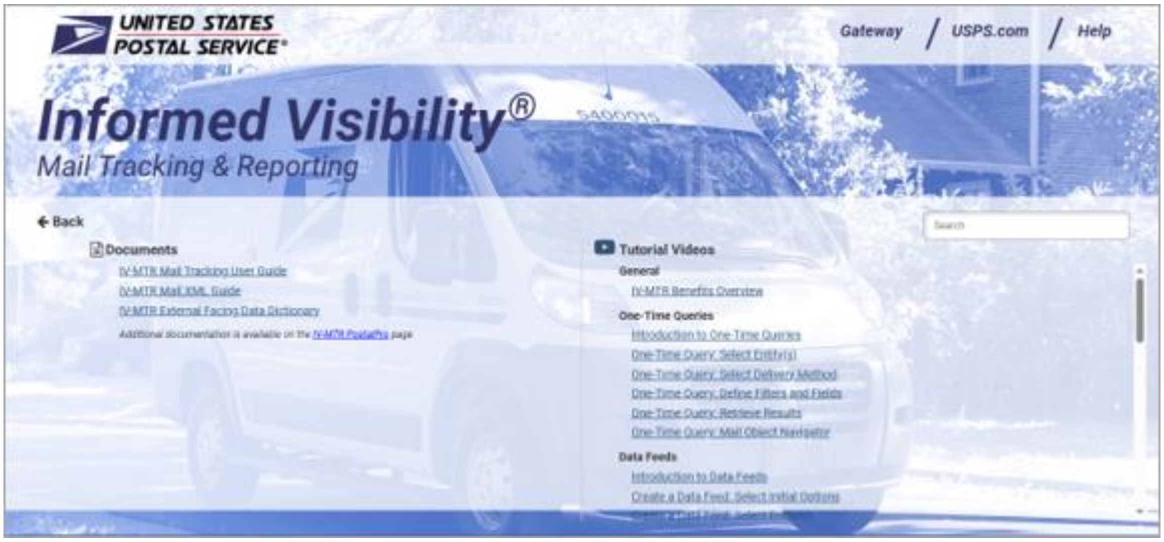
On this screen:

- User documentation is available on the left side. Click a document title to open that document in a new tab from the IV-MTR PostalPro page.
- Tutorial videos are available on the right side. Click a video title to view a video.
- Search the documents and videos by using the search box (as you enter text, the items filter to display those matching your entry).
- For additional resources, visit the IV-MTR PostalPro page. A link is provided at the top left of the screen.

You may access these resources when you are **not** logged into the application by going to https://www.iv.usps.com. Next to the question mark icon on the left side of the page, click the link.

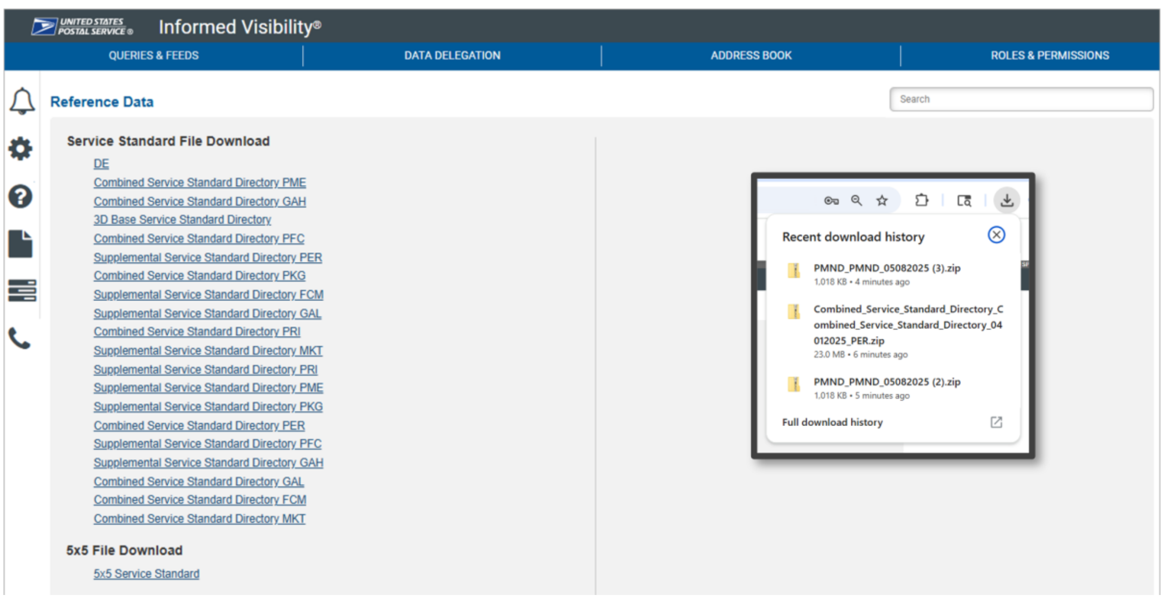


A panel opens, displaying user documentation and tutorial videos. Search the documents and videos using the search box. To return to the IV landing page, click **Back**.

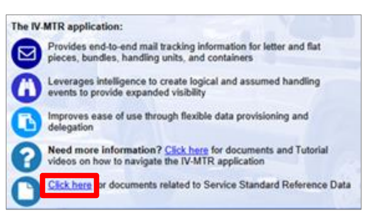


14.2 Reference Data

Clicking the **Reference Data** (document) widget on the top left of the screen brings you to the Reference Data screen within the application, which hosts links to downloadable files available via SSMP (e.g., USPS Service Standards, 5x5 Priority Next Day). Click a hyperlink to initiate file download (see inset below).



You may access these documents when you are **not** logged into the application by going to https://www.iv.usps.com. Next to the document icon on the left side of the page, click the link.



15 Understand Mail Flow and Interpret Scan Data

When interpreting scan data, it is important to remember that a mail object will most likely receive more than one handling event. Multiple handling events of a mail object make it possible to determine the processing time and location of each mail object. By evaluating handling events, mailers can get an indication of when their mailpieces are near delivery.

15.1 Bundle and Piece Status

For bundle and piece visibility, IV-MTR provides information about where and when a bundle or piece received its last handling event and what type of event it was.

To understand where a bundle or piece received its last handling event, look at the last scan facility. Multiple fields describe the last scan facility:

- *Scan Facility Name*
- *Scan Locale Key*
- *Scan Facility ZIP*

To understand when a handling event was received, look at the *Scan DateTime*.

To understand what type of handling event was received, look at the *Scan Event Code*. This is the same as the operation code (opcode). See Section 15.3: *Scan Event Codes* for more information.

15.1.1 Predicted Delivery Date

IV-MTR calculates the Predicted Delivery Date (PDD) for pieces when the first enroute handling event occurs and then recalculates the PDD when subsequent handling events occur. For the business rules around calculating the PDD, see Appendix E.1: *Predicted Delivery Date*.

The PDD is available in the application as a data field for pieces. To view or receive this data field, you would need to perform a one-time query or create a data feed with the delimited file format. This format allows you to choose the data fields you want as well as their display order.

15.1.2 Assumed Handling Events

IV-MTR creates assumed handling events for nested bundles and pieces when a parent mail object (e.g., container) receives a handling event. For information about assumed events, see Appendix E.2: *Assumed Handling Events*.

15.1.3 Logical Handling Events

IV-MTR provides logical handling events, based on business rules, for bundles and pieces. For information about logical events, see Appendix E.3: *Logical Handling Events*.

15.2 Container and Handling Unit Status

For container and handling unit visibility, IV-MTR provides information about where and when a container or handling unit received its last handling event and what type of event it was.

To understand where a container or handling unit received its last handling event, look at the last scan facility. Multiple fields describe the last scan facility:

- *Scan Facility Name*
- *Scan Facility Locale Key*
- *Scan Facility ZIP*

To understand when a handling event was received, look at the *Scan DateTime*.

To understand what type of handling event was received, look at the *Scan State* field. The possible values are:

- **Entered at USPS:** Container or orphan handling unit inducted in Postal Service network (also the scan used for Start-the-Clock)
- **Enroute Arrive:** Container or handling unit arrived at a Postal Service facility or airport
- **Enroute:** Handling unit or bundle was processed at a Postal Service facility on sorting equipment
- **Enroute Depart:** Container or handling unit departed a Postal Service facility or airport

The *Scan Event Code* field, or operation code (opcode), also provides information about the type of handling event received. See Section 15.3: *Scan Event Codes* for more information.

15.2.1 Assumed Handling Events

IV-MTR creates assumed handling events for containers and handling units when a parent mail object (e.g., trailer) receives a handling event. For information about assumed events, see Appendix E.2: *Assumed Handling Events*.

15.3 Scan Event Codes

Each handling event has a three-digit *Scan Event Code*, or operation code (opcode), that describes the type of processing operation that generated the event. Each mail object will likely receive multiple handling event records, each of which will contain a different opcode. The number and type of processing operations that take place depend on numerous factors, including mail class, shape, presort level, and originating and destinating locations.

Mailers can use opcodes to determine the processing status of mail objects. Understanding these opcodes is critical to the interpretation of handling event data. Each opcode represents a type of sortation and the type of equipment on which the mail was processed. Multiple opcodes can describe a particular type of sort operation because each opcode represents a different piece of equipment or mail type.

The IV-MTR PostalPro page provides a list of opcodes in the *IV-MTR Operation Codes List*.

Use Column M (**Mail Phase**) in the Operation Codes List to determine what processing phase the mail object is in. The higher the phase number, the closer the mail is to delivery. The phases are:

- **0:** Origin processing (Cancellation)
- **1:** Origin processing (Outgoing Primary or Outgoing Secondary)
- **2:** Destination processing [Incoming Primary, Managed Mail, Incoming section center facility (SCF)]
- **3:** Destination processing* [Incoming Secondary, Box, Delivery Point Sequence (DPS), or Sector/Segment]
- **4:** Delivery Unit events (logical delivery event)

** This phase is when last processing events occur.*

The following are descriptions of the **Mail Level** (column L) in the Operation Codes List:

- **Cancellation:** Process to cancel postage for collection mail. Typically, the first processing operation received for loose collection mail.
- **Outgoing (O/G) Primary:** Processing of originating mail separated by Automated Area Distribution Center (AADC), 3-digit ZIP Code separations, and 5-digit ZIP Code separations for overnight, 2-day, and 3-day delivery. Additional processing is expected on automated equipment.
- **Outgoing (O/G) Secondary:** Processing of originating mail not finalized on outgoing primary separated by AADC, 3-digit ZIP Code separations, and 5-digit ZIP Code separations for overnight, 2-day, and 3-day delivery. Additional processing is expected on automated equipment.
- **Managed Mail:** Processing of 3- and 5-digit outgoing primary mail normally sorted from an AADC level down to 3-digit ZIP Code level, with high-volume 5-digit zones and firms also held out. Additional processing is expected on automated equipment for the 3-digit sorted volume and the 5-digit sorted volume for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) SCF:** Processing of local destinating mail normally separated by the host SCF by 5-digit ZIP Code. Additional processing on automated equipment is expected for the 5-digit ZIP Codes for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) Primary:** Processing of local mail normally separated by the host SCF by 5-digit ZIP Code for which it has delivery responsibility. Additional processing on automated equipment is expected for mail for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) Secondary:** Processing of local mail normally separated by carrier route. This mail might be finalized, or additional processing might be expected for letter mail on automated equipment (e.g., carrier sequence barcode sorters). This is the final expected processing for flats that are not processed on the Flats Sequencing System (FSS).
- **Box Section:** Processing of local mail normally separated by Post Office™ (PO) Box section. In most instances, this is the final automated processing for this mail (manual sorting is required to separate mail by individual PO Box). In some instances, mail is separated into individual PO Boxes by repeating this operation on automated equipment. This is the reason why mailers may receive multiple scans with the same operation code for a given piece.

- **Sector/Segment (SEC/SEG or S/S):**
  - *1st Pass (Sec/Seg Sequencing):* Processing to separate mail by ZIP+4® sectors. This mail may require additional processing on automated equipment.
  - *2nd Pass (Sec/Seg Carrier Sort):* Processing to separate mail by ZIP+4 segments. This is the final processing of mail.
- **Delivery Point Sequence (DPS):**
  - *1st Pass (DPS Sequencing):* Processing to separate mail into carrier walk sequence. In most cases, this mail requires additional processing on automated equipment. This is the last processing for some mailpieces (e.g., firm holdouts, box sections, and Postal Service facilities).
  - *2nd Pass (DPS Carrier Sort):* Processing to separate mail into carrier walk sequence. This is the final processing of mail.
- **Logical Out for Delivery Event:** Implied event indicating when the mailpieces should be out for delivery. See Appendix E.3.1: *Logical Out for Delivery Events* for information about how the system creates logical out for delivery events.
- **Logical Delivery Event:** Implied event indicating when the mailpiece should have been delivered. See Appendix E.3.2: *Logical Delivery Events* for information about how the system creates logical delivery events.

16 Data Dictionary and Sample Data Set

The *IV-MTR External Facing Data Dictionary* and *Sample Data Set* provide information about the data fields available in the application for the delimited, legacy IMb Tracing PKG, and JSON file formats.

For information about data fields in Mail.XML messages, see the *IV-MTR Mail.XML Guide*.

16.1 Data Dictionary

The *IV-MTR External Facing Data Dictionary*, on the IV-MTR PostalPro page, describes the data fields available in the external-facing IV-MTR application.

The data fields in the Data Dictionary are organized by the mail object to which they apply: container, handling unit, bundle, and piece. The worksheet for a particular mail object lists the data fields available in the application for that mail object type in the delimited, legacy IMb Tracing PKG, and JSON file formats.

The Data Dictionary provides the following information about each data field:

- **New Field:** Indication of whether the data field is new in IV-MTR or was available in the legacy systems (IMb Tracing and *PostalOne!*)
- **Multiple:** Indication that multiple instances of the data field could be received from IV-MTR. When there are multiple values for a data field, the values appear in the same field with a user-selected, multi-value delimiter (e.g., comma, pipe) separating the values.
- **Long Name:** Formal name of the data field
- **Display Name:** Name of the data field as displayed within the IV-MTR application and in delimited files
- **Description:** Explanation of what information the data field provides; includes possible values and their meanings
- **JSON Field Name:** Name of the data field as displayed in JSON files
- **Field Size:** Maximum number of characters in the data field
- **Type:** Format of the data field (e.g., alphanumeric, integer)
- **Sample Data:** Example data for the data field
- **Release to be Available to Mailers:** IV-MTR release in which this data field will be available for users. Allows users to plan for fields that will be available in a future release.
- **Raw/Enriched Indicator (*Piece Only*):** Indication of whether the field is available only in enriched data files or both raw and enriched files

16.2 Sample Data Set

The Sample Data Set workbook, on the IV-MTR PostalPro page, serves as an accompaniment to the Data Dictionary. The Sample Data Set provides sample data in the delimited format for each field available in the IV-MTR application for each mail object type. The workbook is not intended as an example of a mail tracking data file you would receive from the application.

17 Additional Notes

17.1 Data Retention

IV-MTR retains transactional scan-level mail tracking data for 120 days.

17.2 Session Timeout

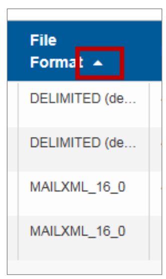
After 30 minutes of inactivity, a user's IV-MTR application session ends, and a "Session Expired" message appears.

Note: The BCG timeout is 15 minutes. If you have the BCG or another BCG application open in another tab or window while you are using IV-MTR, and the BCG or other BCG application times out due to inactivity, your IV-MTR session will also time out, even if you are active in IV-MTR.

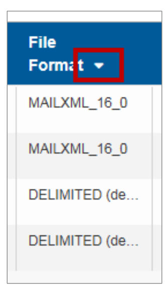
17.3 Table Columns

Throughout the IV-MTR application, you can sort a table by a particular column and adjust the width of any table column.

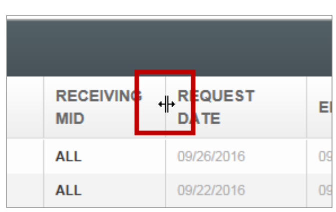
To sort a table by a particular column, click the heading of the column by which you wish to sort. The table sorts in ascending order by the selected column. An icon appears in the column heading indicating the table is sorted by this column.



To sort in descending order, click the selected column again. The table re-sorts, and the icon in the column heading changes.



To adjust the width of a column, hover on the line between two column headings. The mouse icon changes. Drag the icon to adjust the column width.



18 Customer Support

Additional support is available both in documentation format and via Help Desks for both IV-MTR and BCG. More documentation, including user guides, trainings, detailed data information, and a variety of other resources are located on the USPS PostalPro site:

- IV-MTR page: postalpro.usps.com/InformedVisibility
- BCG page: postalpro.usps.com/BCG

The Help Desks for IV-MTR and BCG are:

- IV-MTR: the IV Solutions Center
- BCG: the PostalOne! Help Desk

The following sections provide further details and contact information.

18.1 IV Solutions Center

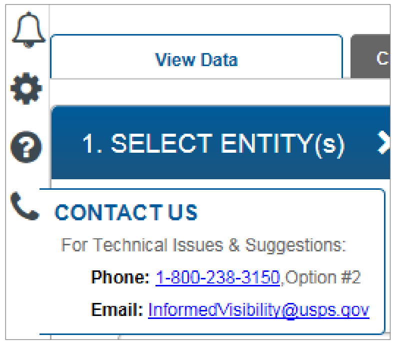
The IV Solutions Center is part of the Postal Service's National Customer Support Center (NCSC) and provides assistance with all areas of the IV-MTR application, including:

- Assisting with onboarding
- Answering general questions
- Administering accounts
- Researching visibility issues
- Verifying barcode elements

The IV Solutions Center is generally able to address most issues on the initial call. However, they will escalate questions or issues to the appropriate functional organizations or management as necessary. You can contact the IV Solutions Center using the information in the table below.

Telephone	1-800-238-3150, Option #2
Email	InformedVisibility@usps.gov
Mail	USPS National Customer Support Center ATTN: Informed Visibility 225 N. Humphreys Blvd, Suite 501 Memphis, TN 38188-1001

Their contact information is also available within the IV-MTR application by clicking the **Contact Us** (telephone) widget at the top left of the screen.



18.2 PostalOne! Help Desk

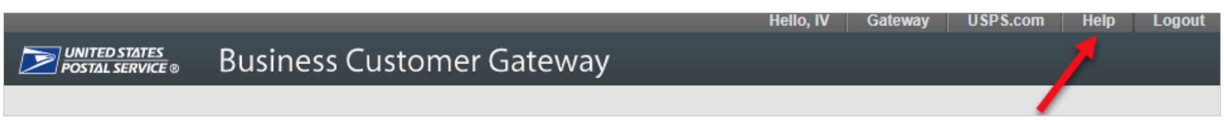
The PostalOne! Help Desk provides support for the BCG, including:

- Account setup
- Business service assistance
- Fielding questions
- Account administration

You can contact the PostalOne! Help Desk using the information in the table below.

Telephone	1-800-522-9085, Option #3
Email	PostalOne@usps.gov
Mail	USPS National Customer Support Center ATTN: PostalOne! Customer Care Center 225 N. Humphreys Blvd, Suite 501 Memphis, TN 38188-1001

PostalOne! contact information is also available within the IV-MTR and BCG applications by clicking the **Help** link in the BCG Navigation bar at the top right of the screen.



The BCG Help page will appear, displaying support resources as well as contact information.

Appendix A Change History

Date	Version	Description
6/17/2025	2.19.8	• Updated Sections 14.1 and 14.2 with Reference Data info on IV Landing Page
6/6/2025	2.19.7	• Added Section 14.2 discussing the new Reference Data widget/screen
3/29/2025	2.19.6	• Updated Mail Tracking Help screenshot and descriptions.
12/14/2024	2.19.5	• Removed data feed retention-period note from the file Output History page.
11/1/2024	2.19.4	• Removed section 4.4 Enter the Authorization Code. • Removed references to Authorization Code process throughout user guide.
6/28/2021	2.19.3	• Updated list of Op Codes in Table E.5.
11/13/2020	2.19.2	• Updated Section 9 to include additional details around data delegation functionality.
6/30/2020	2.19.1	• Updated Table E.5 with Op Codes 077 & 079.
6/20/2020	2.19	• Updated Section 7 to include new steps for one-time queries and for greater clarity. • Added references to IDPC to Figure 1.1 and Sections 1.4.1.2, 3.1, and 8.1.1.2. • Added section 2.1.1 to include information about Postal Wizard mailings. • Updated References in Appendix D.
4/25/2020	2.18	• Added Section 1.4 to introduce key features. • Updated Section 5 for greater clarity and included references to MTR Orientation training. • Updated Section 6 for greater clarity and included references to BSA Instructions. • Updated Your Feeds screenshots in Section 8. • Updated Section 7.3.2, Section 7.3.3, and Appendix K with max date range for piece-level OTQ. • Updated Section 9.4 with new Data Type drop down. • Updated Section 12 to include in-app notification cleanup after three weeks. Updated section overall for greater clarity and user friendliness. • Expanded Section 18 with PostalOne! Help Desk info. • Updated list of References in Appendix D.
2/5/2020	2.17.2	• Added note to section 9 about non-restricted data. • Updated "data attribute" references to "data field" for consistency with user experience in application. • Updated section 3 for greater clarity and user-friendliness.
12/2/2019	2.17.1	• Updated sections 10.1.2 and 10.1.3.2 to remove notes about restrictions for USPS-Provided Servers in EPS/PPC data feeds • Updated URL for main PostalPro page • Updated language in first bullet of Appendix K for clarity

Date	Version	Description
11/8/2019	2.17	• Updated sections 7, 8, and Table 3.4 to removed Email Notification options • Updated sections 10.1.2 and 10.1.3.2 with note that USPS-Provided Servers are unavailable for EPS/PPC data feeds • Updated Return Ballot Receipt wording in Section 5 • Updated Table 3.1 to remove web service pull option • Replaced Mail Object Navigator table in section 7.4 with reference to new stand-alone document • Updated section 8.1 with default time zone for data feed creation • Updated section E.2.1 to replace incomplete list of Assumed Handling Events with reference to Op Codes List
9/21/2019	2.16	• Updated section 8.2.3: *Modify Details* with confirmation screen notes. • Updated section 4: *Access the IV-MTR Web Application* with updated BCG screenshots and clarified instructions. Moved information about data delegation from section 4 to section 9: *Data Delegation.*
8/14/2019	2.15	• Updated section E.3.2: *Logical Delivery Events* with new LDE OpCodes. • Updated Table 3.4 to indicate OTQ begins creating multiple files at 100,000 records. • Updated Data Feed Details screen in section 8.1.1: *Select Initial Feed Options* to display the updated Your Feeds page and section 8.2.2: *View Details* to show last updated date/timestamp. • Removed references to Facility File.
5/11/2019	2.14	• Updated Appendix E.2.1 with assumed Container Appointment Arrival event information.
3/29/2019	2.13	• Added version date and number to cover page. • Updated Sections 3.3.4.1, 3.3.4.2, and 8.1.1.3 to include the Start-the-Clock Mail.XML message types supported.
2/19/2019	2.12	• Updated Section 7.3.2: *Select Mail Object and Handling Event Type(s)* and Appendix K: *Piece-Level One-Time Query Guardrails* to indicate the maximum date range allowed for a piece-level one-time query is now 14 days. • Updated Section 7.3.5: *Finish* to include the query confirmation screen. • Updated Section 7.4.4: *Output History* with a new screenshot and information about canceling a submitted query. • Updated Section 10.1.2.1: *Secure File Transfer Protocol (*SFTP) Server and 10.1.2.3: *HTTPS JSON Web Service* to reflect updated screen flow when testing server connection. • Updated Appendix K: *Piece-Level One-Time Query Guardrails* to indicate that you can submit up to 9 additional piece-level queries when 1 is already processing.
1/9/2019	2.11	• Added note to Sections 1.1: *Purpose* and 8.1.1.2: *Select Feed Data Type* to direct users to information about receiving EPS/PPC data and MQD through IV-MTR. • Updated Section **Error! Reference source not found.**: ***Error! Reference source no t found.*** to reflect that contacting the IV Solutions Center to provide contact information for a Desired BSA is no longer required to complete CRID setup within IV-MTR. • Added information to Section 5.1: *Basic Navigation* about the Other Features widget. • Added Section 7.4.4: *Output History* to describe the new Output History table for one-time queries. • Added links in Appendix D: *References* to the EPS and MQD pages on PostalPro.

Date	Version	Description
10/5/2018	2.10	• Throughout document, updated data retention length from 45 to 120 days. • Added information to Sections 8, 8.1.2.1, 8.1.2.2, and 8.1.2.3 about how to obtain data for non-Tracing STIDs through a data feed. • Updated screenshots in Section 8.1.2.3: *Option 3: Add Routing Code(s)* and 8.1.2.5: *Modify or Remove STID(s)* to show ability to select STIDs 777, 778, and 779 when creating a data feed for routing codes. • Updated Section 14: *Mail Tracking Help* with information about accessing resources and videos when not logged into the web application.
8/24/2018	2.9	• Updated Section 3.3: *File Formats*, 3.4: *Scan Enrichment*, 7.2: *Select Delivery Method*, and 7.3.2: *Select Mail Object and Handling Event Type(s)* to reflect that pieces are now available through one-time queries without going through the IV Solutions Center. • Updated Section 7.4.2: *Data Download* to reflect that one-time query files are now available from the Output History for 72 hours. • Added Appendix K: *Piece-Level One-Time Query Guardrails*.
7/11/2018	2.8	• Updated Sections 13.1.3, 13.1.5, 13.1.6, 13.2.3, 13.3.3, and 13.4.3 to add confirmation screen step. • Updated "IV-MTR Help Desk" to "IV Solutions Center" throughout the document.
6/8/2018	2.7	• Updated Table 5.2: *Functionality by Access Level and User Role* to correct information regarding who can associate/disassociate a saved entity from a data feed and modify an associated saved entity. • Updated Sections 13.1.3: *Modify a Saved Entity* and 13.1.6: *Update a Saved Entity Associated to a Data Feed* to reflect the new confirmation window.
5/11/2018	2.6	• Added Section 3.4: *Scan Enrichment*. • Updated Sections 7.1, 8.1.2, 9.1.1.1, 9.1.1.3, 9.3.1, and 9.3.3 to correct information regarding "Add All" functionality. • Updated Section 8.1.1.1: *Select Subscription Owner CRID*. • Added Section 8.1.1.2: *Select Feed Data Type*. • Updated Section 8.1.1.3: *Select File Format and Define Target* to correct information about which Mail.XML message types are currently available. • Updated description of the **Multiple** column in Section 16.1: *Data Dictionary*. Added description of the **Raw/Enriched Indicator** column.
3/30/2018	2.5	• Reformatted Table 2.3: *Default Permissions by CRID or MID Role*. • Added notes to Section 3: *Data Provisioning Options* and 7: *One-Time Queries* that piece-level one-time queries are only available through the IV Solutions Center at this time. • Updated Section 4: *Access the IV-MTR Web Application* to reflect the latest version of the *Applying for Access to IV-MTR* document. • Updated Table 5.2: *Functionality by Access Level and User Role* to indicate who can associate/disassociate a saved entity to/from a data feed. • Updated Sections 7.1, 8.1.2, 9.1.1.1, 9.1.1.3, 9.3.1, and 9.3.3 to include option to add all CRIDs and/or MIDs. • Updated Sections 7.3.3, 8.1.3.3, 9.1.1.2, and 9.3.2.3 to include information about filter operators and multiple values for Field Value. • Updated Section 13.1.5: *Associate a Saved Entity to a Data Feed* and 13.1.7: *Disassociate a Saved Entity from a Data Feed* to indicate who can associate/disassociate a saved entity to/from a data feed. • Updated Section 13.1.6: *Update a Saved Entity Associated to a Data Feed* to indicate who can modify an associated saved entity. Added instructions for modifying an associated saved entity outside of modifying a data feed.

Date	Version	Description
2/23/2018	2.4	• Updated Section 10.1.3.1: *Non-Standard Port* and 10.1.3.2: *USPS-Provided Server* to change the timeframe for account setup in special scenarios from 14 to 21 days.
2/16/2018	2.3	• Updated Section 2.1: *Visibility Requirements for Mail Objects* with information about recipient role data fields. • Updated Section 3.3: *File Formats* to reflect availability of piece-level data through one-time queries. • Updated Section 3.3.4.2: *Push Messages* to reflect availability of Start-the-Clock Mail.XML push messages. • Updated Section 7.2.3.1: *Delimited File* and 7.2.3.2: *IMb Tracing Legacy File Format* with test connection functionality. • Updated Section 7.3.2: *Select Mail Object and Handling Event Type(s)* with Tracing/non-Tracing STID filter and raw/enriched data option. • Corrected instructions in Section 7.4.1.2: *Mail Object Navigator.* • Updated Section 8: *Data Feeds* with note that only data for IV (Tracing) STIDs is available through a data feed. • Updated Section 8.1.1.3: *Select File Format and Define Target* to include multi-value delimiter option, test connection functionality, and additional message types available for Mail.XML. • Updated Section 8.2: *View or Modify Existing Feed* to reflect addition of Entity Name column. • Updated Section 10.1.2.1: *Secure File Transfer Protocol (*SFTP) Server to include test connection functionality. • Added Section 11: *Roles and Permissions*. • Added Section 13.1.5: *Associate a Saved Entity to a Data Feed*, 13.1.6: *Update a Saved Entity Associated to a Data Feed*, and 13.1.7: *Disassociate a Saved Entity from a Data Feed*. • Relocated and renamed Section 15.1.1: *IMb Tracing Operation Codes* as Section 15.3: *Scan Event Codes*. Updated Section 15.2: *Container and Handling Unit Status* to indicate Scan Event Code is now available for these mail object types.

<table>
<tr><th>Date</th><th>Version</th><th>Description</th></tr>
<tr><td>1/5/2018</td><td>2.2</td><td>

Throughout the entire document:

Updated “IV” to “IV-MTR”.
Removed references to non-secure FTP.
Updated screenshots to reflect changes making most tables and lists sortable.
Updated screenshots and text to reflect new action icons.
Updated screenshots to reflect changes to the landing page and main navigation bar.

Updated Section 0:
Access the Application to reflect the new IV-MTR login page.
Added description of the Contact Us widget to Section 5.
Updated Section 7.1: Select Entity(s) and its subsections with information about exporting a list of the selectable entities.
Added Section 7.4.1.2: Mail Object Navigator.
Updated Section 8.2: View or Modify Existing Feed with a description of the # of Failed Files column and instructions to export the Your Feeds table.
Updated Section 8.2.3: Modify Details with information about the ability to modify the selected entities for an existing data feed.
Update screenshots in Section 9: Data Delegation and its subsections to reflect additional columns added to tables.
Added notes to Section 9: Data Delegation and its subsections that data delegation rules only provide visibility from the time they are created or go into effect.
Added subsection to Section 9.1.1.2: Define Filters & Fields and added Section 9.3.2.5: Choose Effective Date Range about choosing the delegation effective date range.
Updated Sections 9.2.2: Data Delegation Authorization History and 9.4: Data Delegated to My CRID with instructions to export the tables.
Updated Section 10.1.1: Your Servers to reflect updated display of the Servers list.
Updated Section 10.2: View and Add Contacts to reflect change of the “People” tab to the “Contacts” tab.
Added Section 12.3: Email Notifications.
Added Section 12.4: Managing Notification .
Added Section 13: Saved Reports.
Updated Section 14: Mail Tracking Help to reflect the new page design and availability of videos.
Updated Section 18: Customer Support to include information about the Contact Us widget.

</td></tr>
</table>

Date	Version	Description
11/20/2017	2.1	• Updated definition of residual mail in Table 2.1: *Definitions of Visibility Requirement Terms*. Updated footnote regarding residual mail in Table 2.2: *Visibility Requirements by Mail Object and Handling Event Type*, as the 95% Full-Service requirement is temporarily on hold. • Updated Section 3.3: *File Formats* to reflect that bundle-level data is no longer available in the PKG file format, and the PKG file format will be available for one-time queries when piece-level data is available through one-time queries. Added note to Sections 7.2.2, 7.2.3, and 7.2.3.2 regarding the PKG file format for one-time queries. • Added Table 3.4: *File Format Characteristics*. Removed file format tables from Section 3.3, as this new table compiles the information into one table. Updated table with information regarding application behavior when no records are available for a query or feed and added information about the escape character used for some file formats. • Updated Section 5.1: *Basic Navigation* to reflect changes to the main navigation bar and include information about the widgets. • Updated images and tables in Sections 7.3: *Define Filters & Fields* and 8.1.3: *Define Filters & Fields* to reflect saved report functionality. • Added note to Sections 7.3.4: *Select and Arrange Data Fields* and 8.1.3.4: *Select and Arrange Data Fields* that you can rearrange the order of data fields for the JSON file format, but this does not affect the resulting file. • Added notes to Section 8.1.1.3: *Select File Format and Define Target* that email notifications are not available when you select the "Online download" delivery method. • Updated Section 8.1.3.2: *Select Mail Object and Handling Event Type(s)* with information about selection to receive raw and/or enriched data for pieces. • Added Section 12: *Notifications*. • Updated Section 15.1.1: *IMb Tracing Operation Codes* to include definitions of logical out for delivery events and logical delivery events. • Added Sections 15.1.2: *Assumed Handling Events*, 15.1.3: *Logical Handling Events*, and 15.2.1: *Assumed Handling Events*. • Updated Appendix E.2: *Assumed Handling Events* with correct definitions of assumed actual and assumed logical handling events. • Added Appendix E.2.1: *Available Assumed Handling Events*. • Added Appendix E.3.1: *Logical Out for Delivery Events*. Added Appendix E.3: *Logical Handling Events* as an introduction to Appendices E.3.1 and E.3.2. • Updated Appendix I: *Legacy PKG File Naming Convention* to reflect the new naming convention for PKG files in IV-MTR.

Date	Version	Description
9/29/2017	2.0	• Relocated content from previous Appendix I: *Visibility Eligibility* to Section 2.1: *Visibility Requirements for Mail Objects*. • Updated Section 2.3: *Individual Permissions* with information about MID-level visibility. • Updated Section 3: *Data Provisioning Options* to describe the data provisioning options currently implemented in IV-MTR. Added Appendix I: *Legacy PKG File Naming Convention*. Added Appendix J: *Delimited, Mail.XML, and JSON File Naming Convention*. • Updated Section 5 to describe about how a user's BCG access level and IV-MTR application user role(s) determine available functionality. Throughout the document, added and updated notes about functionality limited to users with specific access levels or user roles. • Updated Section 8.1.1.3: *Select File Format and Define Target* and its subsections to include the JSON file format and the online download delivery method for data feeds. • Updated Section 8.1.1.4: *Select Frequency and Start Time* with information about setting the start time and time zone for a data feed. • Added Section 8.2.1: *Output History*. • Updated Section 9.1.2: *Request History* with instructions to cancel a pending request to receive visibility. • Updated Section 9.1.3: *Data Delegation Requests Pending Approval for My CRID* to describe changes to this notification. • Updated Section 9.2.2: *Data Delegation Authorization History* with instructions to delete an existing data delegation rule that is providing visibility to another CRID/MID. • Added Section 10.1.2.3: *HTTPS JSON Web Service*. • Added Section 10.1.3.2: *USPS-Provided Server*. • Updated Appendix D: *References* with references to PostalPro and included additional references. • Throughout the entire document: – Replaced references to the IV-MTR RIBBS page with the IV-MTR PostalPro page. – Added notes regarding discontinued support of non-secure FTP for data transfer. – Updated references to FTP to include SFTP.
8/21/2017	1.1	• Updated Section 2.1: *Visibility Requirements for Mail Objects* and Section 2.2: *Default Permissions* to describe the visibility requirements and default permissions currently implemented in IV-MTR. • Updated Section 5.1: *Basic Navigation* to include a description of the Roles & Permissions area of the application. • Removed notes about support of non-secure FTP being discontinued by the end of FY2017, as the deadline has been extended.
8/9/2017	1.0	• Initial version.

Appendix B Acronyms and Abbreviations

Acronym or Abbreviation	Description
AADC	automated area distribution center
BCG	Business Customer Gateway
BSA	Business Service Administrator
CRID	Customer Registration ID
CSA	customer supplier agreement
DPS	delivery point sequence
EDDM	Every Door Direct Mail™
eDoc	electronic documentation
EPS	Enterprise Payment System
FAST®	Facility Access and Shipment Tracking
FSS	Flats Sequencing System
FTP	file transfer protocol
IMb™	Intelligent Mail® barcode
IMcb	Intelligent Mail® container barcode
IMpb	Intelligent Mail® package barcode
IMtb	Intelligent Mail® tray barcode
IV®-MTR	Informed Visibility® Mail Tracking & Reporting
MID	Mailer ID
MQD	Mail Quality Data
MSP	Mail Service Provider
NCSC	National Customer Support Center
opcode	operation code
PDD	Predicted Delivery Date
PO Box	Post Office™ Box
PPC	Package Platform Concept
SCF	sectional center facility
SFTP	secure FTP
STID	Service Type ID
USPS®	United States Postal Service®
XML	eXtensible Markup Language
XSD	XML Schema Definition

Appendix C Definitions

C.1 Mail Objects

Term	Definition
mailpiece	Letter, flat, or package ***Note:*** *IV-MTR only provides mail tracking data for letters and flats.*
mail object	Generic term referring to a mailpiece, bundle, handling unit (tray, tub, or sack), container, or transportation
physical mail object	One specific mail object (as opposed to a logical mail object)
logical mail object	Grouping of physical, composite mail objects that were created together, with the same sort level, and destined for the same location
physical-logical mail object association	Relationship between two or more physical mail objects that are grouped into a logical mail object

C.2 Nesting

Term	Definition
nesting	Insertion of smaller mail objects into a larger mail object. The smaller mail objects are then referred to as nested mail objects, while the larger mail object is then referred to as a composite mail object.
de-nesting	Removal of nested mail objects from a composite mail object
composite mail object	Any object that contains other mail objects. Bundles, handling units, containers, and transportation are all composite mail objects. May also be referred to as a **mail aggregate** or **parent mail object**.
mail aggregate	See *composite mail object*
parent mail object	See *composite mail object*
nested mail object	Any object nested within another mail object. Mailpieces, bundles, handling units, and containers can all be nested mail objects.
nesting association	Relationship between a nested mail object and the composite mail object the nested mail object is nested into
physical nesting association	Physical or logical mail object is nested to a physical, composite mail object
logical nesting association	Physical or logical mail object is nested to a logical, composite mail object
potential physical parent mail object	Physical parent mail object that is part of a logical mail object and therefore has the potential of being the parent mail object of the mail objects that are nested to the logical mail object

C.3 Handling Event Types

Term	Definition
handling event	Any change in the state of a mail object including actions such as assembling, processing, sorting, scanning, staging, and transporting. May also be referred to as a **scan event**.
actual handling event	Capture of a scan or other handling of a physical mail object
assumed actual handling event	System-generated event that is an implied handling of a nested mail object based on an actual handling event associated to the composite mail object. The actual handling event is assumed for the nested mail objects.
assumed logical handling event	System-generated event that is an implied handling of a nested mail object based on a logical handling event associated to the composite mail object. The logical handling event is assumed for the nested mail objects.
logical handling event	System-generated event for a mail object based on business rules. For example, the system could create a logical handling event for “Out for Delivery” based on an actual handling event of “Arrived at Unit.”

Appendix D References

Referenced Sites

The location for the websites referenced throughout this User Guide are provided in the table below.

Site	Location
BCG portal	https://gateway.usps.com
eDoc page on PostalPro	https://postalpro.usps.com/mailing/edoc
EPS PostalPro page	https://postalpro.usps.com/EPS
Full-Service Fact Sheets PostalPro page	https://postalpro.usps.com/mailing/what-mailers-need-to-know-about-full-service
IV-MTR application	https://iv.usps.com
IV-MTR PostalPro page	https://postalpro.usps.com/informedvisibility
Mailing Services PostalPro page	https://postalpro.usps.com/mailing
MQD through IV-MTR PostalPro page	https://postalpro.usps.com/mailing/mqd
STID Table on PostalPro	https://postalpro.usps.com/service-type-identifiers/stidtable
Service Standard Information	https://postalpro.usps.com/operations/service-standards
Microsoft Office Help Articles	Import or export text (.txt or .csv) files Text Import Wizard

Referenced Documents

The location for the documents referenced throughout this User Guide are provided in the table below.

Reference	Location
About MTAC UG4	https://postalpro.usps.com/informedvisibility/AboutUG4
BSA Instructions	https://postalpro.usps.com/informedvisibility/BSAInstructions
EPS Data Dictionary	https://postalpro.usps.com/eps/iv_data
IDPC Data Dictionary	https://postalpro.usps.com/informedvisibility/IDPCDataDictionary
IDPC Sample Data Set	https://postalpro.usps.com/informedvisibility/IDPCSampleDataSet
IV-MTR External Facing Data Dictionary	https://postalpro.usps.com/informedvisibility/DataDictionary
IV-MTR Machine List	https://postalpro.usps.com/informedvisibility/machinecount
IV-MTR Mail.XML Guide	https://postalpro.usps.com/InformedVisibility/Mail.XMLGuide
IV-MTR Operation Codes List	https://postalpro.usps.com/informedvisibility/OperationCodesList
IV-MTR Orientation Training	https://postalpro.usps.com/InformedVisibility/Orientation

Reference	Location
IV-MTR Sample Data Set	https://postalpro.usps.com/InformedVisibility/MailTrackingSampleDataSet
Mail Object Navigator Data Fields Reference	https://postalpro.usps.com/informedvisibility/MailObjectNavigatorDataFields
MQD Data Dictionary	https://postalpro.usps.com/mailing/mqd/data_dictionary
PPC Data Dictionary	https://postalpro.usps.com/PackagePlatformDataDictionary
Provisioning EPS & PPC Data through IV-MTR	https://postalpro.usps.com/informedvisibility/provisionEPS_PPCdata
Provisioning IDPC Data through IV-MTR	https://postalpro.usps.com/informedvisibility/provisioningIDPCdata
Provisioning MQD Data through IV-MTR	https://postalpro.usps.com/mailing/mqd/instructions
SSL certificate	https://postalpro.usps.com/informedvisibility/productionSSLcertificate
WSDL files	https://postalpro.usps.com/informedvisibility/WSDL

Appendix E Business Rules

See Appendix C: *Definitions* for definitions of terms used in this section.

E.1 Predicted Delivery Date

The Predicted Delivery Date (PDD) indicates when a mailpiece is most likely to go out for delivery. IV-MTR calculates the PDD when the first enroute handling event occurs and then recalculates the PDD when subsequent enroute or destination handling events occur. The following sections provide the business rules for enroute and destination handling events.

Note:

- The PDD is an available data field for pieces in the delimited file format.
- The rules for calculating PDD will change in IV-MTR over time. Eventually, the application will factor in historical performance when calculating PDD, which will provide increased accuracy.
- The application does not update the PDD field for an earlier handling event record when a new handling event is received for the same mail object.

E.1.1 Enroute Handling Event

For handling events that do not occur at the destination facility, the PDD calculation is based on the following:

- Handling event date/time
- Clearance cutoff time for the handling event
- Service standard of the mail class between the facility where the handling event occurred and the piece's destination ZIP Code

To calculate the PDD, first IV-MTR compares the handling event date/time to the clearance cutoff time for that handling event operation to determine whether to use the date of the handling event or add one day to that date for the calculation. Then, the application adds the service standard between the facility where the handling event occurred and the piece's destination ZIP Code. Finally, if necessary, IV-MTR adjusts the PDD to the next Postal Service delivery date. The following table summarizes this calculation:

Table E.1: PDD Calculation for Enroute Handling Event

Scenario	Predicted Delivery Date
Handling event occurred ***at or before*** the clearance cutoff time	Date of handling event + Service standard + Adjusted to next Postal Service delivery date, if necessary
Handling event occurred ***after*** clearance cutoff time	Date of handling event + 1 day + Service standard + Adjusted to next Postal Service delivery date, if necessary

Note: *Service standard information is available on PostalPro.*

E.1.2 Destination Handling Event

For handling events that occur at the destination facility, IV-MTR calculates the PDD based on whether the handling event was a last processing event or not. See the following sections for the business rules.

E.1.2.1 Non-Last Processing Handling Event

This section of the User Guide is under development.

E.1.2.2 Last Processing Handling Event

For last processing handling events that occur at the destination facility, the PDD calculation is based on the following:

- Handling event date/time
- Clearance cutoff time for the handling event

Certain types of handling events qualify as last processing events. To determine if a handling event is considered a last processing event, follow these steps:

1. Open the *IV-MTR Operation Codes List* from the IV-MTR PostalPro page.
2. Within the worksheet, find the opcode for the handling event. The handling event is a last processing event if column D (**Stop-the-Clock Scan?**) for that opcode is "Yes".

If the handling event is a last processing event, IV-MTR calculates the PDD by first comparing the handling event time to the clearance cutoff time for that operation to determine whether to use the date of the handling event or add one day to that date. Then, if necessary, the application adjusts the PDD to the next Postal Service delivery date. The following table summarizes this calculation:

Table E.2: PDD Calculation for Last Processing Handling Event

Scenario	Predicted Delivery Date
Handling event occurred ***at or before*** the clearance cutoff time	Date of handling event + Adjusted to next Postal Service delivery date, if necessary
Handling event occurred ***after*** clearance cutoff time	Date of handling event + 1 day + Adjusted to next Postal Service delivery date, if necessary

Note: *Find the clearance cutoff time in column E (**Clearance Cut off time**) of the IV-MTR Operation Codes List worksheet.*

The following table provides examples of how IV-MTR calculates the PDD for different scenarios:

Table E.3: Examples of PDD Calculation for Last Processing Events

Scenario Description	Handling Event Opcode	Handling Event Date/time	Last Processing Event?	Clearance Cutoff Time	Predicted Delivery Date
Last processing handling event that occurs **before** cutoff time	919	04/15/2016 06:23:47 (Friday)	Yes	10:00	04/15/2016 (Friday)
Last processing handling event that occurs **after** cutoff time	538	04/15/2016 08:12:09 (Friday)	Yes	6:00	04/16/2016 (Saturday)
Last processing handling event that occurs **after** cutoff time, but next calendar day is not a Postal Service delivery day (e.g., Sunday)	918	04/16/2016 11:04:56 (Saturday)	Yes	10:00	04/18/2016 (Monday)
Last processing handling event that occurs **after** cutoff time, but next calendar day is a Postal Service holiday (e.g., Thanksgiving)	918	11/23/2016 10:17:48 (Wednesday)	Yes	10:00	11/25/2016 (Friday)

E.1.3 Example of PDD Calculation for a Mailpiece

The following table provides an example of how IV-MTR would calculate the PDD for a particular mailpiece as it travels through the mailstream. In this example, the mailpiece is a periodical with IMb Delivery ZIP Code 602:

Table E.4: Example of PDD Calculation for a Mailpiece

Scan	Handling Event Type	Handling Event Date/time	Before Clearance Time?	Scan ZIP Code	Service Standard to Delivery	Calculation	Predicted Delivery Date
1	Enroute	11/01/2016 09:01:03 (Tuesday)	Yes	221	5 days	Handling event date + 5 days*	11/07/2016 (Monday)
2	Enroute	11/02/2016 05:11:53 (Wednesday)	Yes	221	5 days	Handling event date + 5 days	11/07/2016 (Monday)
3	Enroute	11/03/2016 12:55:23 (Thursday)	No	450	4 days	Next day + 4 days	11/08/2016 (Tuesday)
4	Enroute	11/06/2016 06:01:24 (Sunday)	Yes	602	3 days	Handling event date + 3 days	11/09/2016 (Wednesday)
5	Last processing	11/06/2016 15:01:55 (Sunday)	No	602	n/a	Handling event date + 1 day	11/07/2016 (Monday)

** Adjusted for Sunday or non-processing day*

E.2 Assumed Handling Events

An assumed handling event is a system-generated event that is an implied handling of a nested mail object based on a handling event associated to the composite mail object. In other words, when a composite mail object receives a handling event, IV-MTR assumes the event to the mail objects nested within and creates assumed handling events for those objects. Assumed handling events are dependent upon mailer eDocs (Mail.dat or Mail.XML eDoc) for mailer containers, handling units, and bundles as well as Postal Service nesting information for Postal Service containers and handling units.

In IV-MTR, the *Handling Event Type Description* for an assumed handling event is "Assumed Actual" or "Assumed Logical". When IV-MTR creates an assumed event based on an *actual* handling event of the composite mail object, the assumed event is set as "Assumed Actual". When IV-MTR creates an assumed event based on a *logical* handling event of the composite mail object, the assumed event is set as "Assumed Logical".

The following sections provide information about the assumed handling events currently available in the application as well as how assumed handling events are created based on physical versus logical nesting associations.

E.2.1 Available Assumed Handling Events

Several assumed handling events are available in IV-MTR. For a full list of available assumed events, see the *IV-MTR Operation Codes List* on PostalPro. Additional information about logical out for delivery and logical delivery events is available in Appendix E.3.1: *Logical Out for Delivery Events* and Appendix E.3.2: *Logical Delivery Events*.

Through assumed handling events, IV-MTR is able to provide enhanced bundle visibility. The following figure depicts the handling events that are especially important for this visibility.

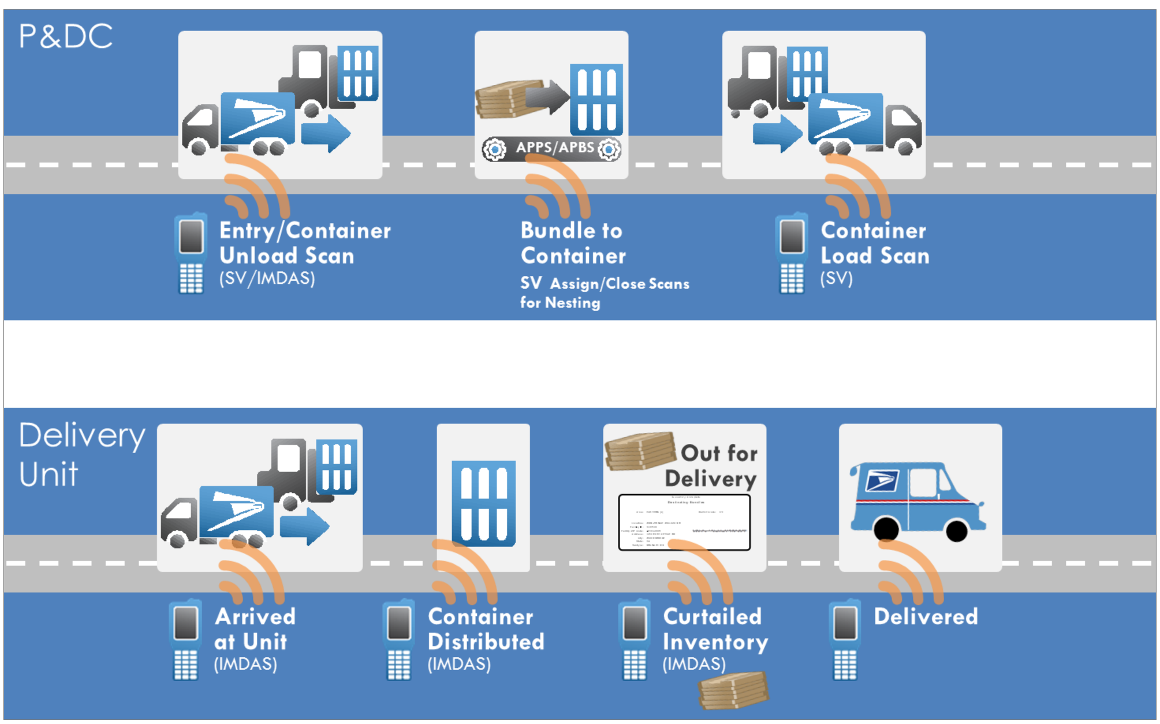


Figure E.1: Processing Events for Enhanced Bundle Visibility

E.2.2 Physical vs. Logical Nesting Associations

Currently, IV-MTR creates assumed handling events based on physical nesting associations. In the future, assumed events based on logical nesting associations will be available. The following sections provide additional information about how the application creates assumed handling events based on physical and logical nesting associations.

E.2.2.1 Physical Nesting Associations

When an actual or logical handling event is received for a composite mail object **AND** the composite mail object has a *physical* nesting association with a nested mail object, IV-MTR creates an assumed handling event for the nested mail object. The date/time, location, and event description for the assumed handling event created for the nested mail object remain the same as the actual handling event. The barcode provided in the assumed handling event record is the nested mail object barcode.

E.2.2.2 Logical Nesting Associations

Note: Assumed handling events based on logical nesting associations will be implemented in IV-MTR in a future release. The following provides the draft business rules for creating these events; these rules are subject to change.

In the future, the application will create assumed handling events for mail objects nested to a *logical* mail object when **all** of the following are true:

1. The potential physical parent mail objects* have the same handling event type
2. The handling events have the same handling event location
3. The handling event date/times are within two hours of each other
4. The handling events are associated to the same equipment (if applicable)
5. The handling events are associated to the same machine run (if applicable)
6. The handling events have the same disposition (e.g., output bin, staging area) (if applicable)

** A potential physical parent mail object is a physical parent mail object that is part of a logical mail object and therefore has the potential of being the parent mail object of the mail objects nested to the logical mail object. The following image depicts potential physical parent mail objects and their relationships to a logical mail object and a nested mail object.*

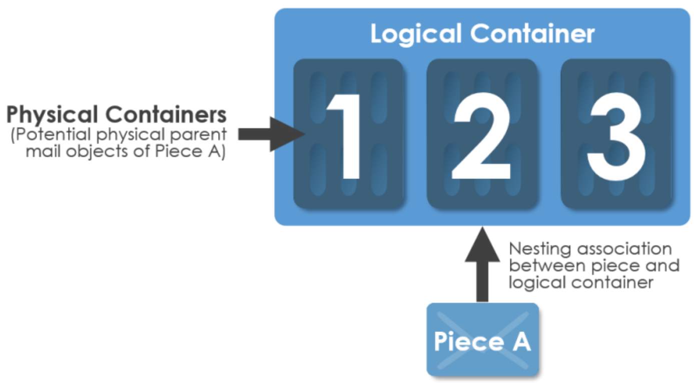


Figure E.2: Potential Physical Parent Mail Object Relationships

The barcode provided in the assumed handling event record will be the nested mail object barcode. The handling event date/time for the record will be the time of the last chronological handling event associated to the logical mail object.

E.3 Logical Handling Events

A logical handling event is a system-generated, implied handling event for a mail object based on business rules. Logical handling events are different from actual handling events (based on physical scans) and assumed handling events (based on nesting associations). In IV-MTR, the *Handling Event Type Description* for a logical handling event is “Logical”.

Currently, the application creates two logical handling events: 1) logical out for delivery events and 2) logical delivery events. The following sections provide additional information about these logical handling events.

E.3.1 Logical Out for Delivery Events

One of the logical handling events that IV-MTR creates is the logical out for delivery event for bundles. A logical out for delivery event indicates that a bundle has arrived and been distributed at the Delivery Unit and is expected to be out for delivery. The *Scan Event Code* (opcode) for the handling event is 516.

The application creates a logical out for delivery event as follows:

1. A truck arrives at the Delivery Unit from the plant, and the containers are unloaded.
2. Containers with mail being processed for that day's delivery are scanned as "Distributed".
3. Carriers depart the Delivery Unit to make the day's deliveries. The bundles that did **not** go out for delivery that day are scanned as "Curtailed".
4. When the "Inventory Complete" barcode is scanned, IV-MTR creates a logical out for delivery event for any bundle that received a "Distributed" scan but **not** a "Curtailed" scan.

   Note: If the "Inventory Complete" barcode is not scanned, all mail that received a "Distributed" scan for that day reverts to "Curtailed" volume. Therefore, IV-MTR would not generate logical out for delivery events for that mail for that day.

The following image depicts the logical out for delivery process for bundle visibility.

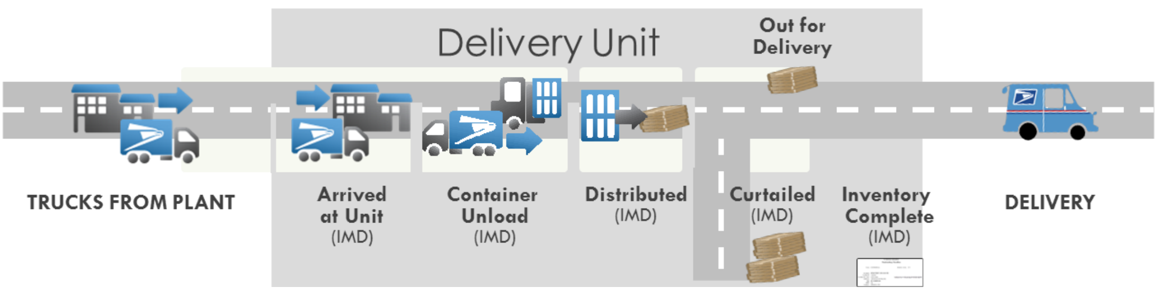


Figure E.3: Logical Out for Delivery Process for Bundle Visibility

When IV-MTR creates a logical out for delivery event for a bundle, the application also creates *assumed* logical out for delivery events for pieces nested to the bundle (if nesting association information is available). The *Handling Event Type Description* for the resulting handling event for the pieces is "Assumed Logical," and the *Scan Event Code* (opcode) for the handling event is 516.

Such nested pieces then meet the inventory criteria for IV-MTR to create logical delivery events for those pieces. If the trigger criteria are also met, the application creates logical delivery events for those pieces. For additional information, see Appendix E.3.2: *Logical Delivery Events*.

E.3.2 Logical Delivery Events

A logical delivery event, which is a type of logical handling event, is an implied delivery. The *Scan Event Code* (opcode) is 517.

The steps for creating a logical delivery event are as follows:

1. When a mailpiece receives its last expected processing operation, the mailpiece is added to inventory for delivery, and the system updates the ADD (see Appendix E.1: *Predicted Delivery Date*).
2. When the logical delivery event trigger criteria are met, the system generates the logical delivery event. The timestamp associated to the logical delivery event is the time the trigger occurred.

The following table describes the criteria the system uses to add a mailpiece to inventory for delivery based on the last expected processing operation as well as the trigger criteria and time used for the logical delivery event. The criteria differ based on the type of delivery:

Table E.5: Inventory and Trigger Criteria for Logical Delivery Events

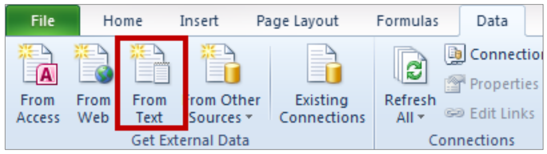
Delivery Scenario	Inventory Criteria	Trigger Criteria and Time Used for Logical Delivery Event
On-street	Mailpiece received processing scan with one of the following opcodes: 077, 079, 131, 146, 147, 151, 240, 266, 296, 315, 316, 317, 318, 336, 337, 386, 390, 406, 407, 416, 431, 446, 466, 467, 486, 538, 816, 826, 830, 870, 896, 897, 898, 899, 905, 906, 908, 910, 912, 913, 916, 917, 918, or 919	Carrier device leaves geofence on the ADD for the associated ZIP+4*
PO Box		PO Box uptime barcode is scanned on the ADD for the associated Post Office
Caller Service (Delivery Unit)		Opening time of Post Office on the ADD

** If data is not received indicating the carrier device left the geofence for the associated ZIP+4, gaps are filled in when three consecutive (by route sequence) ZIP+4 geofence exits are observed. At that time, any previous ZIP+4s in the route sequence that had not previously received a geofence exit event are then triggered for creation of logical delivery events. For example, there is a set of ZIP+4s labeled by route sequence as A B C D E. The first geofence exited is C, then D, and then E. Because C, D, and E are consecutive ZIP+4s according to the route sequence, and A and B had not yet received a geofence exit event, A and B are then triggered for creation of logical delivery events. The time used for the logical delivery event is the same as for E.*

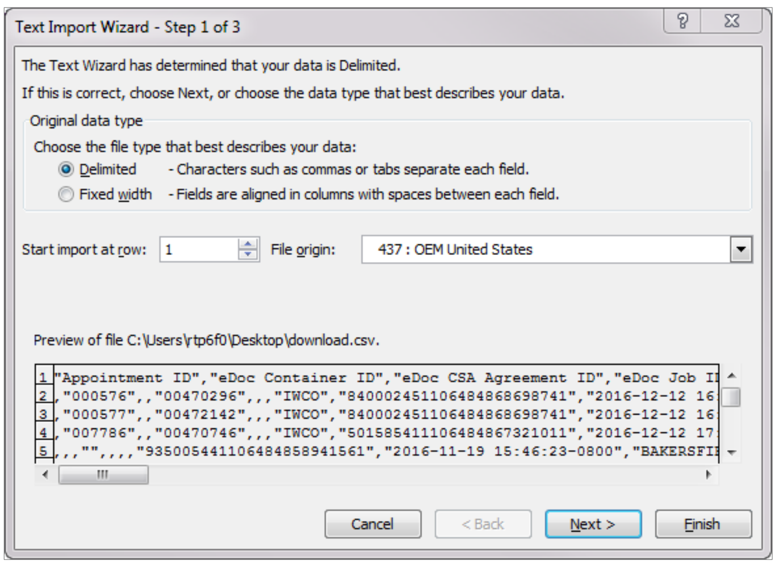
Appendix F Import CSV or TXT File into Microsoft Excel

These instructions explain how to import a CSV or TXT file into Microsoft Excel 2010. Importing into other versions of Excel is similar. The links at the end of this section provide additional information.

1. Within Excel, open a blank workbook.
2. On the **Data** tab, in the **Get External Data** group, click **From Text**.



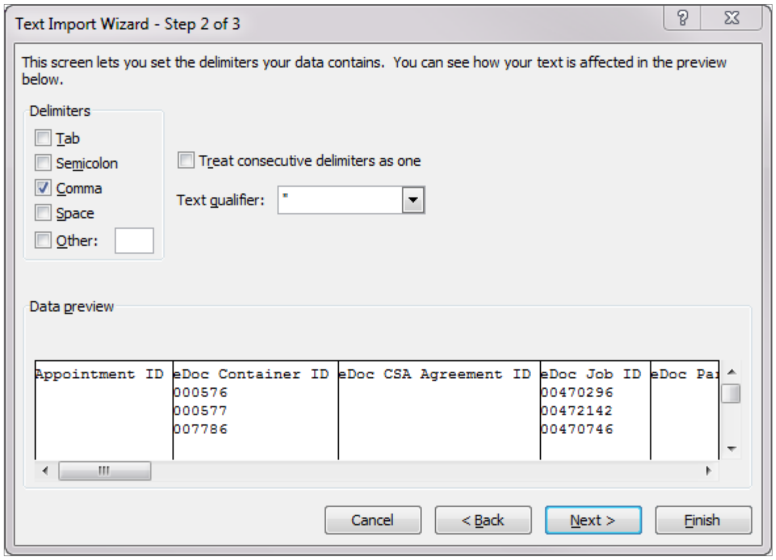
3. Locate and double-click the file you want to open. The Text Import Wizard starts.
4. **Step 1:** Select the file type.
   a. Select **Delimited**.
   b. Click **Next**.



5. **Step 2:** Select the delimiter used in the file.

    a. Select the delimiter that separates values in the file. (For an IV-MTR Legacy IMb Tracing package file, select **Comma**. For an IV-MTR Delimited file, select the appropriate delimiter.)

    b. Click **Next**.



6. **Step 3:** Select the data format for each column. It is recommended to import all columns as text by doing the following:

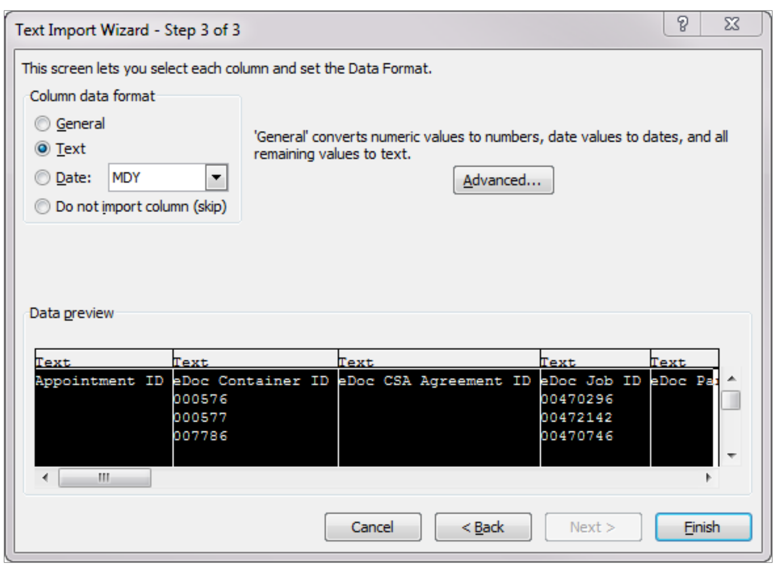
    a. Under **Data preview**, select the first column.

    b. Scroll all the way to the right of the preview area.

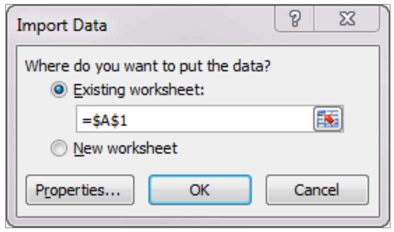
    c. Hold the **Shift** key and select the last column. All columns in the **Data preview** area should be highlighted.

    d. Under **Column data format**, select **Text**.

    e. Click **Finish**.



7. When prompted, choose where to import the data, and click **OK**.



Note:

- If you do not import numbers to be formatted as text, Excel may drop any leading zeros.
- You may need to convert numbers stored as text to numbers if you intend to use any formulas with the data.
- If you save the file, Excel defaults to save as an Excel workbook (.xlsx).
- For additional information, see the following webpages:
  - Microsoft Office Help: Import or export text (.txt or .csv) files
  - Microsoft Office Help: Text Import Wizard

Appendix G Legacy *PostalOne!* Informed Visibility Download File Format

Customers who previously downloaded container and handling unit visibility reports from the *PostalOne!* Data Distribution dashboard can create a delimited file in IV-MTR to obtain the same information. The following table shows a mapping of the *PostalOne!* data fields to the IV-MTR fields.

Note: Some fields are no longer available or will not be available until a future release.

For information about creating a delimited file for download, see Section 7: *One-Time Queries*. For information about creating a data feed to receive delimited files, see Section 8: *Data Feeds*.

Table G.1: Mapping of *PostalOne!* Fields to IV-MTR Fields

No.	*PostalOne!* Field	IV-MTR Field	Description
A	CRID	eDoc Submitter CRID	CRID of the eDoc Submitter
B	UserLicenseCode	eDoc User License Code	4-character code that uniquely identifies the eDoc provider. Combination of eDoc User License Code and eDoc Job ID uniquely identifying a mailing. Provided in Mail.dat and can be used in Mail.XML.
C	MaildatJobID	eDoc Job ID	Mail.dat Job ID of the eDoc to which the mail object is associated. Provided in Mail.XML eDocs as well. Job IDs are user-managed but must remain unique within one User License Code.
D	CustomerGroupID	eDoc Customer Group ID	Mail.XML Customer Group ID for the specific mail object
E	MailingGroupID	eDoc Mailing Group ID	Mail.XML Mailing Group ID for the specific mail object
F	ConsigneeApptID	Appointment ID	FAST Appointment Number associated to the mail object. Provided in eDoc as the Reservation Number.
G	LogicalIndicator	*Not available at this time*	
H	CSADispatchNumber	eDoc CSA Agreement ID	Customer Supplier Agreement (CSA) number generated by USPS. Provided in eDoc and associated to the mail object.
I	ContainerID	eDoc Container ID	6-character value that uniquely identifies a container or handling unit within a specific job. This value links Mail.dat files and is unique within Job ID, exclusive of container or handling unit type.
J	ParentContainerID	eDoc Parent Container ID	eDoc Container ID of the container or handling unit in which this child container or handling unit resided, based upon the eDoc. Parent containers and handling units may have parent containers themselves (e.g., a carton in a sack upon a pallet).

No.	*PostalOne!* Field	IV-MTR Field	Description
K	SiblingContainerID	eDoc Sibling Container ID	eDoc Container ID of the container or handling unit for which this container or handling unit was created due to an overflow of pieces that could not be included in the original container or handling unit. In the event of a sibling container or handling unit, the eDoc Container ID of the original affected container or handling unit must be populated in this field. This field is blank if a sibling container or handling unit was not created.
L	ContainerType	*Not available at this time*	
M	USPSFacilityLocaleKey	Scan Locale Key	USPS Facility Locale Key of the facility where the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)
N	USPSFacilityName	Scan Facility Name	USPS Facility Name of the facility where the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)
O	ScanDateTime	Scan DateTime	Date and time when the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)
P	ScanState	Scan State	State of the mail object based on the last chronological handling event (may be actual, assumed, or logical handling event)
Q	ScanStatus	*Not available in IV-MTR*	
R	ScanIssueDescription	*Not available in IV-MTR*	
S	ScanIssueResolution	*Not available in IV-MTR*	
T	IMcb	IMcb	IMcb received as part of eDoc or handling event scan record ***Note:*** *Only available for containers*
U	IMtb	IMtb	IMtb received as part of eDoc or handling event scan record ***Note:*** *Only available for handling units*
V	IMb	IMb	IMb received as part of eDoc or handling event scan record ***Note:*** *Only available for bundles and pieces*
W	FullServiceComplianceIndicator	*Not available in IV-MTR*	
X	FullServiceNonComplianceReasonCode	*Not available in IV-MTR*	
Y	FullServiceAvailabilityDate	*Not available in IV-MTR*	
Z	FullServiceIndicator	*Not available at this time*	
AA	PackageID	*Not available at this time*	
AB	PackageLevelCode	*Not available at this time*	
AC	PackageZipCode	*Not available at this time*	

No.	*PostalOne!* Field	IV-MTR Field	Description
AD	PackagePieceCount	Bundle Count	Count of bundles associated to container or handling unit, as determined by eDoc
AE	PackageCopiesCount	*Not available at this time*	
AF	BundleScanType	*Not available at this time*	

Appendix H CRID and MID Role Identification

H.1 Mail Owner

Table H.1: Mail.dat Mail Owner Identification Rules

Order of Precedence	Mail.dat File Reference	Field Name
1	CPT	MID of mail owner
2	MPA	MID of mail owner
3	CPT	CRID of mail owner
4	MPA	CRID of mail owner

Table H.2: Mail.XML Mail Owner Identification Rules

Order of Precedence	Mail.XML Message Reference	Field Name
1	MailPieceCreateRequest message: MailPieceBlockGroup, MailPieceBlock, MailOwner block	MailOwnerMID6 or MailOwnerMID9
2	MailPieceCreateRequest message: MailPieceBlockGroup, MailPieceBlock, MailOwner block	CRID
3	QualificationReportCreateRequest message: ContainerInfoData	MailOwnerCRID

Note: IV-MTR will provide mail tracking visibility of EDDM in a future release.

Table H.3: EM-DOC Mail Owner Identification Rules

Order of Precedence	EM-DOC File Reference	Field Name
1	EM-DOC	Mail Owner CRID

H.2 Mail Preparer

Table H.4: Mail.dat Mail Preparer Identification Rules

Order of Precedence	Mail.dat File Reference	Field Name
1	MPA	MID of mail preparer
2	MPA	CRID of mail preparer

Table H.5: Mail.XML Mail Preparer Identification Rules

Order of Precedence	Mail.XML Message Reference	Field Name
1	QualificationReportCreateRequest message: QualificationReportPreparer block	MailerID6 or MailerID9
2	QualificationReportCreateRequest message: QualificationReportPreparer block	CRID

Note: IV-MTR will provide mail tracking visibility of EDDM in a future release.

Table H.6: EM-DOC Mail Preparer Identification Rules

Order of Precedence	EM-DOC File Reference	Field Name
1	EM-DOC	Mail Preparer CRID

H.3 eDoc Submitter

Table H.7: Mail.dat eDoc Submitter Identification Rules

Order of Precedence	Mail.dat File Reference	Field Name
1	SEG	eDoc sender CRID

Table H.8: Mail.XML eDoc Submitter Identification Rules (Mailpieces)

Order of Precedence	Mail.XML Message Reference	Field Name
1	MailPieceCreateRequest message: SubmittingParty	MailerID6 or MailerID9
2	MailPieceCreateRequest message: SubmittingParty	CRID
3	QualificationReportCreateRequest message: SubmittingParty	MailerID6 or MailerID9
4	QualificationReportCreateRequest message: SubmittingParty	CRID
5	ManifestCreateRequest message: SubmittingParty	MailerID6 or MailerID9
6	ManifestCreateRequest message: SubmittingParty	CRID

Table H.9: Mail.XML eDoc Submitter Identification Rules (Containers and Handling Units)

Order of Precedence	Mail.dat File Reference	Field Name
1	QualificationReportCreateRequest message: SubmittingParty	MailerID6 or MailerID9
2	QualificationReportCreateRequest message: SubmittingParty	CRID

Note: IV-MTR will provide mail tracking visibility of EDDM in a future release.

Table H.10: EM-DOC eDoc Submitter Identification Rules

Order of Precedence	EM-DOC File Reference	Field Name
1	EM-DOC	Mail Submitter CRID

H.4 FAST Scheduler

Table H.11: Mail.dat FAST Scheduler Identification Rules

Order of Precedence	Mail.dat File Reference	Field Name
1	CSM	FAST Scheduler ID (CRID)

Table H.12: Mail.XML FAST Scheduler Identification Rules (Mailpieces)

Order of Precedence	Mail.XML Message Reference	Field Name
1	MailPieceCreateRequest message: SubmittingParty	SchedulerID (CRID)
2	QualificationReportCreateRequest message: SubmittingParty	SchedulerID (CRID)
3	ManifestCreateRequest message: SubmittingParty	SchedulerID (CRID)

Table H.13: Mail.XML FAST Scheduler Identification Rules (Containers and Handling Units)

Order of Precedence	Mail.XML Message Reference	Field Name
1	QualificationReportCreateRequest message: SubmittingParty	SchedulerID (CRID)

H.5 MID on Piece

The MID contained in the IMb is used to determine the MID on Piece. For an IMb that uses a Reply Mail by ZIP IMb construct, the application uses the routing code contained in the IMb to determine who has visibility of data for the piece.

IV-MTR will provide mail tracking visibility of EDDM in a future release. EDDM utilizes an Intelligent Mail® package barcode (IMpb) on EDDM Bundle Facing Slips. The MID from the IMpb is used to identify the MID on Piece for EDDM bundles.

H.6 MID on Tray

The MID contained in the IMtb is used to determine the MID on Tray.

H.7 MID on Container

The MID container in the IMcb is used to determine the MID on Container.

Appendix I Legacy PKG File Naming Convention

The file naming convention for the legacy PKG file format in IV-MTR different from the IMb Tracing Mail Tracking & Reporting application. The file name construct in IV-MTR is as follows:

File name:	**Example:**
fsbXXXXXXX.pkg	fsbbda0113.pkg
Where XXXXXXX is a seven-digit, alphanumeric sequence number that is unique across all files generated by IV-MTR	

Appendix J Delimited, Mail.XML, and JSON File Naming Convention

The file name construct for delimited, Mail.XML, and JSON files in IV-MTR is as follows:

File name:

YYYYMMDDHHmmss_AA_BBBB_CCCC.XXXX

Where:

YYYY = year
MM = month
DD = day

HH = hour
mm = minutes
ss = seconds

AA = two letters for the mail object type, as follows:

CS = container	*TS = handling unit*
BS = bundle	*PS = piece*

BBBB = four alphanumeric characters representing the message group (e.g., A2WU)
CCCC = four numbers representing the message number in the group (e.g., 0001)

XXXX = file extension

Delimited file = TXT
Mail.XML message = XML
JSON file = JSON

Appendix K Piece-Level One-Time Query Guardrails

Piece-level one-time queries can return millions of scan event records. The guardrails listed in the table below are in place to help ensure system availability and stability.

Table K.1: Piece-Specific One-Time Query Guardrails

Guardrail	Threshold	Information
Max Date Range	14 days	When you select piece as the mail object type, a required *Scan DateTime* filter area appears for you to enter the desired date range. You may select up to a 14-day range within the past 120 days. • Additional date ranges cannot be added to piece-level one-time queries
Concurrent Piece-Level Queries	9	While a piece-level query is processing, you can submit up to 9 additional **piece-level** queries to be processed. The additional queries are queued and processed in order of submission once the original query finishes processing. • This guardrail does *not* apply to other handling object queries - you can submit an unlimited number of container, handling unit, or bundle one-time queries while a piece-level query is processing.
Max Number of Records Returned	250 million	
Note: These guardrails are subject to change.		