

INFORMED VISIBILITY®

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

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Welcome to this guide for **Provisioning Informed Delivery Post-Campaign** (IDPC) Detailed Data through the Informed Visibility® Mail Tracking & Reporting (IV-MTR) application.

This guide provides information about:

- The IV-MTR application
- Setting up your IV-MTR account to receive Informed Delivery Post-Campaign Detailed data*
- Creating queries and feeds to receive data
- Modifying and deleting your IDPC data feeds
- Data file conventions and characteristics
- <u>Troubleshooting resources</u>, including tutorial videos, detailed documentation, and contact info for the IV Solutions Center and the Informed Delivery Interactive Campaigns Support Team

It also provides high-level guidance for:

- Delegating data between Customer Registration IDs (CRIDs)
- Managing servers associated with your IV-MTR account

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





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

Mail Tracking (Scan) Data

- Event-based data that allows mailers to see where their mail is in the mailstream
- Informed Delivery Post-Campaign (IDPC) Detailed Data
 - Data for Informed Delivery interactive campaigns, including:
 - Click-throughs

o Recipient ZIP

• Email Opens

Image Placement in Email

- o Delivery Dates
- Enterprise Payment System (EPS) Data
 - Payment data for mailings, PO Boxes, and other Postal products
- Package Platform Concept (PPC) Data
 - Physical and payment data for packages
- Mail Quality Data (MQD) Data
 - Detailed error data from the Mailer Scorecard



The IDPC data available in IV-MTR is pass-through data that is not generated by IV-MTR itself

- Please see the <u>IDPC Data Dictionary</u> for information about the data provided in IV-MTR
- Additional information about the Post-Campaign Reports generated in the Mailer Campaign Portal (MCP) can be found in the <u>Informed</u> <u>Delivery Interactive Campaign Guide</u>

IDPC data in IV-MTR is available through one-time queries and data feeds

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

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



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

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

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

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

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



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

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

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

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

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

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



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

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

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



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

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

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

Only want to share your IDPC data?

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



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

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



Creating an IDPC One-Time Query



Access the IV-MTR Application

Option 1: Directly

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

Informed Visibility® Mail Tracking & Reporting	oons
Welcome to Informed Visibility Mail Tracking & Reporting (IV®-MTR), the U.S. Postal Service source for near real-time letter and flat mail tracking information. The IV-MTR application: Provides end-to-end mail tracking information for letter and flat pieces, bundles, handling units, and containers Image: Service to create logical and assumed nanding events to provide expanded visibility Improves ease of use through flexible data provisioning and	Watch the IV-MTR benefits overview video
delegation	For more information, visit the IV-MTR page on PostalPro.
LOG IN Already have access? Click the Log In button to go to the IV-MTR Application.	SIGN UP Need access to IV-MTR? Click the Sign Up button for instructions on getting access.

Option 2: Through the BCG

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





When you log in to IV-MTR, the homepage (the **Queries & Feeds** page) appears, set to the **View Data** tab.

There are two sections on this page:

- The top section allows you to create one-time queries
- The bottom section, One-Time Query Output History, contains the results of one-time queries created in the past 72 hours.

QUERIES & FEEDS		DATA DELE	EGATION		ADDRESS	воок		ROLES & PERMISSIONS
View Data	Create & Manage Data Feed	s					2 Data D	elegation Requests Pending Approval for My CF
1. SELECT ENTITY(s)	> 2. SELECT DE	LIVERY METHO	D 👂 3. DEFINE FI	ILTERS &	FIELDS			
LOAD SAVED REPORT								
One-Time Query Data Type :	Scan Data	•						
Include Origin Scans								
Select CRID(s)		Add	1 MID(s)			C	Your selected MIDs	
Search for a CRID from the	list below	s	earch for a MID		Q		COMPANY NAME	CRID/MID
COMPANY NAME	CRID	C	OMPANY NAME	MID				
IV Communicators	+ ADD A 94	L CRIDs 825367	Select a CRID or	search for M	Ds			
IV DELEGATORS	94	825368						
LET'S LEARN IV-MTR	94	826032						
LOAD SAVED ENTITY								SAVE ENTITY
								NEXT STEP
One-Time Query Outpu	t History ()							
HOST	SUBMISSION TIME 👻		MAIL OBJECT TYPE		# OF AVAILABLE FI	LES	STATUS	ACTION
N/A	Thu May 28 11:11:50 CDT 2	020	Informed Delivery Post-Cam	paign	0		Queued	■ 🖓 오
								•
	►I 10 ► items per pag	e						1 <u>,</u> 1 of 1 iter



To begin a one-time query, locate the Select Entity section at the top of the screen.

- This area allows you to choose what type of data and CRIDs/Mailer IDs (MIDs) you will receive data for.
- Choose your data type:
- 1. In the **One-Time Query Data Type** drop down menu, select **Informed Delivery Post-Campaign**.

1. SELECT ENTITY(s)	>	2. SELECT DELIVERY MET
LOAD SAVED REPORT		
One-Time Query Data Type :	Info	rmed Delivery Post-Campaign 🔻
Select CRID(s)	Sca	n Data
Search for a CRID from th	Info	rmed Delivery Post-Campaign



The **Select CRID(s)** section allows you to choose the CRIDs and MIDs you want to receive data for in your query.

• The left side of the screen provides tools for selecting your entities.

1. SELECT ENTITY(s)	2. SELECT DELIVERY M	ETHOD > 3. DEFINE F	FILTERS & FIELDS		
LOAD SAVED REPORT One-Time Query Data Type : Infor	med Delivery Post-Campaign *				
Select CRID(s)		Add MID(s)		Your selected MIDs	
Search for a CRID from the list below	v	Search for a MID	Q	COMPANY NAME	CRID-MID
COMPANY NAME	CRID + ADD ALL CRIDs 94825367 94826032	COMPANY NAME	MID or search for MIDs		
LOAD SAVED ENTITY	_				SAVE ENTITY

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

OAD SAVED REPORT						
e-Time Query Data Type : Info	med Delivery Post-Campaign *					
ielect CRID(s)		Add MID(s)		C	Your selected MIDs	
Search for a CRID from the list bein	M	Search for a MID		۹	COMPANY NAME	CRID/MID
COMPANY NAME	CRID	COMPANY NAME	MID			
IV Communications	+ ADD ALL CRIDs 94825367 94826032	Select a CRID	or search for MIDs			



You can choose entities that:

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

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

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

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

1. SELECT ENTITY(s) 🗲	2. SELECT DELIVERY	METHOD 🔉 3. DEFINE FIL	TERS & FIELDS	
LOAD SAVED REPORT One-Time Query Data Type : Info	ormed Delivery Post-Campaign	•		CN.
Select CRID(s)		Add MID(s)		S
Search for a CRID from the list belo	w	Search for a MID	Q	
COMPANY NAME	CRID		MID	
IV Communicators	+ ADD ALL CRIDs 94825367	Select a CRID or se	earch for MIDs	

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

	A	В	С	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



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

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

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

Select CRID(s)			Add MID(s)		
Search for a CRID from the list below)	Search for a MID		٩
COMPANY NAME	CRID			MID	
IV Communicators LET'S LEARN IV-MTR	+ ADD ALL CRIDs 94825367 +SHOW MIDs		IV Communicators		Clear + ADD ALL MIDs 94825367 900051234

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



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

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

Note: You can choose MIDs that:

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

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

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



Add MIDs using one of the following methods:

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

The MID(s) move(s) to the **Your Selected MIDs** pane.

Add MID(s)			Your selected MIDs	
Search for a MID		٩	COMPANY NAME	CRID/MID
COMPANY NAME	MID		IV Communicators All MIDs Added	94825367 -REMOVE
		Clear		
LET'S LEARN IV-MTR		ALL MIDs 94826032		
				SAVE ENTITY
				NEXT STEP

Repeat this step as necessary until all desired MIDs have been added, then click **NEXT STEP**. 19



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

lect how you would like to view your data from the o	ptions below.	
Prepare for Online View	Prepare for Data Download	Send to Address
Select this option if you would like to view the data	File Format	File Format
online in a table.	Delimited File 🔹	Delimited File 🔹
	Delimiter	Delimiter
	Comma 🔹	Comma 🔻
		Define Target
		Select
This Delivery Method is not available for the		Add a server Go to address book
selected data type.		File Transfer Format
		Un-zipped 🔻
		TEST SERVER CONNECTION
USE THIS METHOD	USE THIS METHOD	USE THIS METHOD

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

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



The data download option prepares a file with your query results that is available within the application.

- Files can be downloaded at your leisure, up to 72 hours after they are generated.
- Files are available in the delimited format.
- To use the Online Download method, follow these steps:
 - 1. In the **Delimiter** dropdown menu, select a delimiter character for your file. If you choose "Other", a new field will appear where you can enter the desired character.
 - Note: It is recommended you do not choose Comma as a delimiter in IDPC files since IDPC data itself can contain commas.

Delimiter		
	Tab	•
Comma		
🖌 Tab		
Other - Please s	pecify	

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

File Format		
	Delimited File	•
Delimiter		
	Tab	•



The send to address option prepares a file with your query results and sends it to the server of your choosing.

- A copy of the file will also be available in the application for you to download up to 72 hours after it has been generated.
- Files are available in the delimited format.

To use the Send to Address method, follow these steps:

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

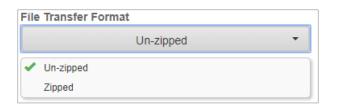


- 2. In the **Define Target** drop down, select the target server(s).
 - The Define Target drop down is populated with servers already listed in your IV-MTR Address Book. If you need to add a new server to the list, click the **Add a server** link and follow the instructions in the <u>Adding a Server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

Define Target	
Select	-
Add a server Go to address book	



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



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



5. Click USE THIS METHOD.

end to Address	
File Format	
Delimited File	•
Delimiter	
Tab	*
Define Target	
321	•
Add a server Go to address book	
File Transfer Format	
Un-zipped	*
TEST SERVER CONNECTION	
USE THIS METHOD	
USE THIS METHOD	



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

1. SELECT ENTITY(s) > 2. SELECT DELIVERY METHOD > 3.	DEFINE FILTERS & FIELDS
SELECTED CRID(s): 20480655, 20482579 SELECTED MID(s): 900029356, 900045499	
LOAD SAVED REPORT	SAVE REPORT
LOAD SAVED FILTER ADD FILTER	SAVE FILTER
ID Post-Campaign Mail Tracking data retention is limited to 120 days	
LOAD SAVED VIEW	SAVE VIEW
Data Fields	
+ Add All	
Barcode Identifier	
🗢 Barcode Mailer ID	Drag fields here to add to report
Barcode Serial Number	
Brand Display Name	
🗢 Campaign Code	
	Fields above will display in report, drag to reorder.



- To add a filter, follow these steps:
 - 1. Click the **ADD FILTER** button.



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

Filter			DELETE
	Select a Field to Filter On	Select Operator Field Value + ADD CONDITION	
ID Post-Campaign Mai	Brand Display Name Campaign Code Campaign Title End Date	ys	
LOAD SAVED VIEW Data Fields	Record Type		SAVE VIEW
+ Add All	Start Date	<u>^</u>	^

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

Filter			DELETE
Select a Field to Filter On Brand Display Name 🗸	Select Operator	Field Value	+ ADD CONDITION
ID Post-Campaign Mail Tracking data retention is limited to 120 days	Begins With Ends With Contains		
LOAD SAVED VIEW Data Fields Add All Barcode Identifier Barcode Mailer ID	Does Not Contain Equal to Not Equal to One of Not One of		SAVE VIEW



- 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).

Field Value	
Really Awesome Mailings In	1

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

	Filter						DELETE
	Select a Field t Brand Disp		Select Ope Contain		~	Field Value Really Awesome Mailings Inc	+ ADD CONDITION
To remove	one filter,	click the – I	REMO	DVE link to	o the	e far right of th	e filter
•	Filter						DELETE
	AND	Select a Field to Filter On Brand Display Name Select a Field to Filter On	*	Select Operator Contains Select Operator	*	Field Value Really Awesome Mailings Inc Field Value	- REMOVE - REMOVE + ADD CONDITION
To remov	e all filters	, click the D	ELETI	link on tl	he to	op right corner	of the filters area
	Filter						DELETE

1.1					DECEN
	Select a Field to Filter On Brand Display Name	Select Operator Contains	Field Value Really Awesome Mailings Inc	+ ADD CONDITION	

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



The **Data Fields** section allows you to choose the specific fields you receive in your results. You can also choose the order they appear in.

- The fields on the left are available to be added, and the fields on the right are already included in your query.
- Drag or double-click fields to move them from one side to the other. To add all available data fields, click + Add All.
- For details about the data fields themselves, please see the <u>IDPC Data Dictionary</u>.

Data Fields		
+ Add All	Remove All	<u>^</u>
Barcode Identifier	Brand Display Name	
🗢 Barcode Mailer ID	🗢 Campaign Title	
🜩 Campaign Code	eDoc Submitter Name	
Delivery Date	🜩 Barcode Serial Number	
	·	•
	Fields above	e will display in report, drag to reorder.

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





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

1. Click FINISH.





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

Review Updates for One-Time Query		×
Click Confirm to submit the One-Time Query or click Update to make change	s. Filters	
Selected CRID(s)/MID(s)/Routing Code(s)	Other Filters	
All MID(s) of CRID 94825367 All MID(s) of CRID 94826032	None	
File Format	File Transfer Format	
DELIMITED (delimiter: ,) Target	N/A - Download	
N/A - Download		
Data Fields		
Barcode Identifier Barcode Mailer ID Barcode Serial Number Brand Display Name When Clicked Through When Email Was Sent ZIP5		
CANCEL	UPDATE	



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

Submitted	×
Your query has been submitted. Please navigate to View File History to retrieve your file(s). The file(s) will be available for 72 hours from query submission.	
CLOSE	

One-time query creation is now complete. The new query will appear in the One-time Query Output History table.

• For instructions on reviewing the feed's output files, see the next slide.

One-Time Query Output History 6								
HOST	SUBMISSION TIME 👻	MAIL OBJECT TYPE	# OF AVAILABLE FILE \$	STATUS				
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	0	Queued				
4				•				
	10 🗸 items per page			1 <u>-</u> 1 of 1 items				



After a query has been submitted, it is placed in the processing queue for your account.

 Online Download only: Once the query has been processed, you will be notified per your notification settings (see the <u>IV-MTR User Guide</u> for details).

The results of your one-time query are available as follows:

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

One-Time Query Output History 6							
HOST	SUBMISSION TIME 👻	MAIL OBJECT TYPE	# OF AVAILABLE FILES	STATUS	ACTION		
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	1	Complete			
4						÷	
	► ► 10 ► items per page				1 <u>-</u> 1 of 1	1 item:	

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



To view your query results, follow these steps:

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

One-Time Query Output History e							
HOST	SUBMISSION TIME 🔻	MAIL OBJECT TYPE	# OF AVAILABLE FILE \$	STATUS	ACTION		
N/A	Thu May 28 11:11:50 CDT 2020	Informed Delivery Post-Campaign	1	Complete	≡ 2	4	
4						- F	
	▶ 10 ► items per page				1 <u>-</u> 1 of	1 items	

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

Available Files								
FILE NAME	TOTAL SCANS	DOWNLOAD TIME	MOST RECENT ATTEMPT 🔻	DELIVERY SUCCESS	ACTION			
20200528113	22508				Â.			
Image: state of the state								

CLOSE



Creating an IDPC Data Feed



Access the IV-MTR Application

Option 1: Directly

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

Informed Visibility® sacone Mail Tracking & Reporting	
Welcome to Informed Visibility Mail Tracking & Reporting (IV®-MTR), the U.S. Postal Service source for near real-time letter and flat mail tracking information. The IV-MTR application: Provides end-to-end mail tracking information for letter and flat pieces, bundles, handling units, and containers Image: Deverages intelligence to create logical and assumed handling events to provide expanded visibility Improves ease of use through flexible data provisioning and	Watch the IV-MTB benefits overview video
delegation	For more information, visit the IV-MITR page on PostalPro
LOG IN Already have access? Click the Log In button to go to the IV-MTR Application.	SIGN UP Need access to IV-MTR? Click the Sign Up button for instructions on getting access.

Option 2: Through the BCG

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





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

	QUERIES & FEEDS	DATA DELEGATIO	ON	ADDRESS BOOK		ROLE	ES & PERMISSIONS
♪ ≎	View Data Create & Manage I	Data Feeds			2	Data Delegation Requ	uests Pending Approval for My CRID
0	1. SELECT ENTITY(s) > 2. SELE	CT DELIVERY METHOD	3. DEFINE FILTERS &	FIELDS			
C	LOAD SAVED REPORT One-Time Query Data Type : Scan Include Origin Scans	Data 🔹					
	Select CRID(s) Search for a CRID from the list below	Add MID(s Search fo		۲ <u>م</u>	Your selected MID	-	CRID/MID
	COMPANY NAME CRID		NY NAME A MID				
	IV Communicators IV DELEGATORS LET'S LEARN IV-MTR	+ ADD ALL CRIDs 94825367 94825368 94826032	Select a CRID or search for MID	S			
	LOAD SAVED ENTITY						SAVE ENTITY



The Create & Manage Data Feeds screen appears. There are two sections at the top of this page:

- The **Your Feeds** section on the left displays existing data feeds. Here you can view or modify the details of a data feed and view or retrieve a feed's output history.
 - This area is viewable by all users.
- The **Create a New Feed** section on the right is where you create a new data feed.
 - This area is only viewable to BSAs, BSA Delegates, or Subscription Managers.

QUER	IES & FEEDS			DATA DELE	EGATION		ADDRESS BOOK		оок	ROLES & PERMISSIONS
View Data		Create & Manage	Data Feeds							2 Data Delegation Requests Pending Approval for My CRID
Your Feeds	<u>7</u>						Sea	rch		Create a New Feed
Feed Name 🔺	Entity Name	Mail Object Type	Target	File Format	Frequency	Active	# of Failed Files	Output History	Details	Subscription Owner CRID
Daily Scan Data		Piece	N/A	DELIMITE	1 Day(s)	Active	-			94825367 (IV COMMUNICATORS) Feed Data Type
MQD 4 hrs_CRID		Mail Quality	N/A	DELIMITE	Daily	Active	-			Select T
MQD 4 hrs_CRID		Mail Quality	N/A	DELIMITE	Daily	Active	-			File Format
MQD 4 hrs_CRID		Mail Quality	N/A	DELIMITE	Daily	Active	-			Delimited File Delimiter Multi-value Delimiter
PPC_CRID94825		Package	N/A	DELIMITE	4 Hour(s)	Active	-			Comma • N/A •



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

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

Create a New Feed				
Subscription Owner CRID				
	94825367 (IV COMMUNICATORS)			
 Image: A start of the start of	94825367 (IV COMMUNICATORS)			
_	94826032 (LET'S LEARN IV-MTR)			

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



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



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

File Format	Delimiter	Multi-value Delimiter	
	Pipe 🔻	N/A 👻	
Delimited File JSON	Comma ✓ Pipe Tab Other - Please specif	Online download book	

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





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



- b. Online download: Check the box for Online download.
 - This automatically greys out the Define Target option, as a target server is not needed for this option.

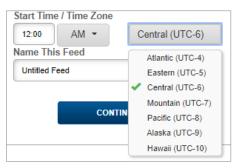
Define Target	
Select *	Online download
Add a server Go to address book	

- 5. The **Frequency** section allows you to choose how often you want to receive data from the feed. In the **Frequency** field, enter a value and select minutes, hours, or days from the drop down menu.
 - By default, the frequency is set to every 4 hours. However, you can customize this from as often as every minute to as long as every 31 days.

Frequency	У		
4		Hours	•
Start Time	e / Time Z	Minutes	
12:00	АМ 🍷 🗸	Hours	- 1
Name Thi	s Feed	Days	



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



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

Name This Feed					
Example IDPC Data Feed					
	CONTINUE				

8. Click **CONTINUE**.





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

SELECT ENTITY(s)	> 2. DEFINE FILTER	RS & FIELDS			
LOAD SAVED REPORT Select CRID(s)		Add MID(s)		Your selected MIDs	
Search for a CRID from the lis	st below	Search for a MID	Q	COMPANY NAME	CRID/MID
COMPANY NAME	CRID	COMPANY NAME	MID		
IV Communicators	+ ADD ALL CRIDs 94825367	Select a CRID or	search for MIDs		
LOAD SAVED ENTITY					SAVE ENTITY

Note: You can choose entities that:

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

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

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



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

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

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

Select CRID(s)			Add MID(s)		
Search for a CRID from the list below			Search for a MID		٩
COMPANY NAME CRID			COMPANY NAME	MID	
IV Communicators LET'S LEARN IV-MTR	+ ADD ALL CRIDs 94825367 +SHOW MIDs		IV Communicators		Clear + ADD ALL MIDs 94825367 900051234

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



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

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

Note: You can choose MIDs that:

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

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

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



Add MIDs using one of the following methods:

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

The MID(s) move(s) to the **Your Selected MIDs** pane.

Add MID(s)			Your selected MIDs	
Search for a MID		٩	COMPANY NAME	CRID/MID
COMPANY NAME	MID		IV Communicators All MIDs Added	94825367 -REMOVE
		Clear		
LET'S LEARN IV-MTR		ALL MIDs 94826032		
				SAVE ENTITY
				NEXT STEP

Repeat this step as necessary until all desired MIDs have been added, then click **NEXT STEP**. 44



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

1. SELECT ENTITY(s) > 2. SELECT DELIVERY METHOD > 3. DEFINE FILTERS & FIELDS	
SELECTED CRID(s): 20480655, 20482579 SELECTED MID(s): 900029356, 900045499	
LOAD SAVED REPORT	SAVE REPORT
LOAD SAVED FILTER ADD FILTER	SAVE FILTER
ID Post-Campaign Mail Tracking data retention is limited to 120 days	
LOAD SAVED VIEW Data Fields	SAVE VIEW
 Add All Barcode Identifier Barcode Mailer ID Barcode Serial Number Brand Display Name 	
	▼ lay in report, drag to reorder.



- To add a filter, follow these steps:
 - 1. Click the **ADD FILTER** button.

LOAD SAVED	FILTER
ADD FILTER	
) Post-Campaid	n Mail Tracking data retention is limited to 120 days

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

Filter			DELETE
	Select a Field to Filter On	Select Operator Field Value + ADD CONDITION	
ID Post-Campaign Mai	Brand Display Name Campaign Code Campaign Title End Date	γs	
LOAD SAVED VIEW Data Fields	Record Type	S/	AVE VIEW
+ Add All	Start Date Status		Â

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

Filter				DELETE
	Select a Field to Filter On Brand Display Name	Select Operator	Field Value	+ ADD CONDITION
		[_]		+ ADD CONDITION
		Begins With		
ID Post-Campaign M	lail Tracking data retention is limited to 120 days	Ends With		
		Contains		
		Does Not Contain		
LOAD SAVED VIEW	W	Equal to		SAVE VIEW
Data Fields		- Not Equal to -		
+ Add All		One of		
🕈 Barcode Ide	ntifier	Not One of		
A Barcodo Ma	ller ID			



- 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).

	Field Va	lue
Really Awesome Mailings Inc	Really	Awesome Mailings Inc

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

Filter Select a Field to Filter On Select Operator Brand Display Name Contains						0		'	
Read Dicelay Name	Filter								
Brand Display Name Contains Really Awesome Mailings Inc ADD CONDITION		Select a Field to Filter On		Select Operator		Field Value			
		Brand Display Name	*	Contains	~	Really Awesome	e Mailings Inc		+ ADD CONDITION

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

er					DEL
	Select a Field to Filter On	Select Operator		Field Value	
	Brand Display Name	Contains	~	Really Awesome Mailings Inc	- REMOVE
	Select a Field to Filter On	Select Operator		Field Value	
AND		~	~		- REMOVE + ADD CONDITION

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

Filter							DELETE
	Select a Field to Filter On		Select Operator		Field Value		
	Brand Display Name	~	Contains	~	Really Awesome Mailings Inc	+ ADD CONDITION	

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



The **Data Fields** section allows you to choose the specific fields you receive in your results. You can also choose the order they appear in.

- The fields on the left are available to be added, and the fields on the right are already included in your data feed.
- Drag or double-click fields to move them from one side to the other. To add all available data fields, click + Add All.
- For details about the data fields themselves, please see the <u>IDPC Data Dictionary</u>.

Data Fields		
+ Add All	- Remove All	-
Barcode Identifier	Brand Display Name	
⊕ Barcode Mailer ID	Campaign Title	
Campaign Code	eDoc Submitter Name	
Delivery Date	+ Barcode Serial Number	
	v	•
	Fields above will disp	lay in report, drag to reorder.

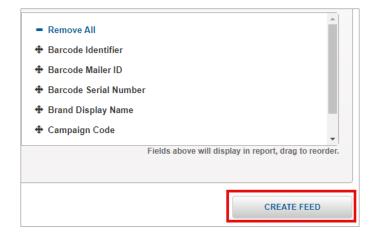
 Once you have selected the data fields to be included, arrange them in your preferred order by dragging and dropping them on the right side of the Data Fields section.





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

1. Click **CREATE FEED**.





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

Success	×
Data feed(s) created.	
ок	

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

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

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



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

To retrieve files for a data feed, complete the following:

- On the Queries and Feeds page, click Create & Manage Data Feeds.
- On the **Create & Manage Data Feed** screen, locate the feed in the **Your Feeds** section.
- Click the **Output History** icon for the feed.

Your Feeds Search										
Feed Name 🔺	Entity Name	Mail Object Type	Target	File Format	Frequency	Active	# of Failed Files	Output History	Details	
Daily Scan Data		Piece	N/A	DELIMITE	1 Day(s)	Active	-			
Example IDPC Data F		Informed	N/A	DELIMITE	4 Hour(s)	Active				
MQD 4 hrs_CRID 948		Mail Qualit	N/A	DELIMITE	Daily	Active	-			
MQD 4 hrs_CRID 948		Mail Qualit	N/A	DELIMITE	Daily	Active	-			
MQD 4 hrs_CRID 948		Mail Qualit	N/A	DELIMITE	Daily	Active	-			
PPC_CRID94825367		Package	N/A	DELIMITE	4 Hour(s)	Active	-			
4									•	
		25 🗸 item	s per page						1 - 9 of 9 items	



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

Data feed file	es are saved for 7 days	PRINT	EXPORT AS				
Host	File Name	Total Scans	Most Recent Execution Attempt 👻	Delivery Success	Resend to Host	Download	
IV SFTP	fsb4p01456.p	2837	Mon Apr 23 11:52:01 CDT 2018	Success	Resend	Download	
IV SFTP	fsb4on3544.p	2280	Mon Apr 23 10:50:13 CDT 2018	Success	Resend	Download	
IV SFTP	fsb4om4540	2421	Mon Apr 23 09:50:20 CDT 2018	Success	Resend	Download	
IV SFTP	fsb4ol5752.pk	2133	Mon Apr 23 08:51:26 CDT 2018	Success	Resend	Download	
IV SFTP	fsb4ol1518.pk	8814	Mon Apr 23 07:52:12 CDT 2018	Success	Resend	Download	
<						>	
I 1 1/33 ► 5 ~ items per page 1 - 6 of 16							



Managing Existing Data Feeds

Reviewing, Modifying, Disabling, and Deleting



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

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



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

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

Active	# of Failed Files	Output History	Details		Example IDPC Data Feed Last Update Date/Time: 05/28/2020 02:58:04 PM CDT		PRINT EXPORT
Active	-			~	Entities	Filters	
Active	-				Selected CRID(s) and MID(s) All MID(s) of CRID 94825367	Data Type Informed Delivery Post-Campaign	Other Filters None
Active	-				Subscription Owner CRID	Frequency	
Active	-				94825367	4 Hours	
Active	-					12:00 AM (US/Central)	
Active	-				DELIMITED (delimiter:)		
Activo		-		~	Target N/A	File Transfer Format	
			1 <u>-</u> 11 of 12 ite	ms	Data Fields Barcode Identifier Barcode Mailer ID Barcode Serial Number Brand Display Name Campaign Code	Active Feed Indicator Inactive	
	Active Ac	ActiveFailed FilesActive-Active-Active-Active-Active-Active-Active-Active-	ActiveFailed FilesOutput HistoryActive-·Active-·Active-·Active-·Active-·Active-·Active-·Active· </td <td>ActiveFailed FilesOutput HistoryDetailsActive-II<t< td=""><td>ActiveFailed FilesOutput HistoryDetailsActive-IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII</td><td>Active Failed Files Output History Details Active - Image: Constraint of the second of</td><td>Active Failed Files Output History Details Example IDPC Data Feed Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID 94825367 Image: Selected CRID 94825367 Active - Image: Selected CRID 94825367 Selected CRID 94825367 Frequency Active - Image: Selected CRID 94825367 Hours Image: Selected CRID 94825367 <t< td=""></t<></td></t<></td>	ActiveFailed FilesOutput HistoryDetailsActive-II <t< td=""><td>ActiveFailed FilesOutput HistoryDetailsActive-IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII</td><td>Active Failed Files Output History Details Active - Image: Constraint of the second of</td><td>Active Failed Files Output History Details Example IDPC Data Feed Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID 94825367 Image: Selected CRID 94825367 Active - Image: Selected CRID 94825367 Selected CRID 94825367 Frequency Active - Image: Selected CRID 94825367 Hours Image: Selected CRID 94825367 <t< td=""></t<></td></t<>	ActiveFailed FilesOutput HistoryDetailsActive-IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Active Failed Files Output History Details Active - Image: Constraint of the second of	Active Failed Files Output History Details Example IDPC Data Feed Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Image: Selected CRID(s) and MID(s) Active - Image: Selected CRID(s) and MID(s) Image: Selected CRID 94825367 Image: Selected CRID 94825367 Active - Image: Selected CRID 94825367 Selected CRID 94825367 Frequency Active - Image: Selected CRID 94825367 Hours Image: Selected CRID 94825367 <t< td=""></t<>



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

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

Y	′our Feeds 了				Search	
	File Format	Frequency	Active	# of Failed Files	Output History	Details
	DELIMITED (deli	Daily	Active	-		
	DELIMITED (deli	Daily	Active	-		
	DELIMITED (deli	Monthly	Active	-		
	DELIMITED (deli	4 Hour(s)	Active	-		



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

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

Details for Example IDPC Data Feed Rena Last Update DeterTime: 05/28/2020 02:35:30 PM CDT	ame	Scroll to bottom of page to commit changes
LOAD SAVED REPORT		SAVE REPORT
Entities Select CRID(s) Search for a CRID from the list below COMPANY NAME CRID COMPANY NAME CRID	Add MID(s) Search for a MID COMPANY NAME No MID found	COMPANY NAME CRIDINID Unknown 94825367 All MIDs Added -REMOVE
LOAD SAVED ENTITY Feed Configuration Data Type Informed Delivery Post-Campaign File Format Delimited File Pipe N/A	Define Target Select Conline download Add a server Go to address book File Transfer Format Un-zipped TEST SERVER CONNECTION	Frequency 4 Hours * Start Time / Time Zone 12:00 AM * Central (UTC-6) *
LOAD SAVED FILTER ADD FILTER ID Post-Campaign Mail Tracking data retention is limited to 120 days		SAVE FILTER
LOAD SAVED VIEW Data Fields		SAVE VIEW
Add All Campaign Title Delivery Date eDoc Submitter CRID eDoc Submitter Name Email ID	 Remove All Barcode Identifier Barcode Mailer ID Barcode Serial Number Brand Display Name Campaign Code 	Fields above will display in report, drag to reorder.
		Activate/Deactivate the feed?
		DELETE FEED UPDATE FEED

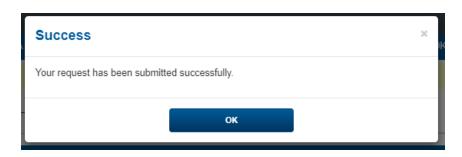




- 5. A **Review Updates** screen will appear, listing the changes made and asking you to confirm they are correct.
 - To accept the changes, click **CONFIRM**.
 - To make changes, click **BACK**.
 - To cancel the update altogether, click **CANCEL**.

Review Updates for Example IDPC Data Feed				
By clicking Confirm, you will be a Feed Configuration	applying the following updates.			
Old Value Schedule Start Time: 12:00 AM (US/Central)	New Value Schedule Start Time: 11:00 AM (US/Central)			
ВАСК	CANCEL	л		

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





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

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

Your Feeds 📝			Search			
	File Format	Frequency	Active	# of Failed Files	Output History	Details
	DELIMITED (deli	Daily	Active	-		
	DELIMITED (deli	Daily	Active	-		
	DELIMITED (deli	Monthly	Active	-		
	DELIMITED (deli	4 Hour(s)	Active			



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

IMPORTANT:	To save changes	s, you must	click UPC	ATE FEED.
	LOAD SAVED VIEW Data Fields Add All Campaign Title Delivery Date Construction of the eDoc Submitter CRID Campaign Construction Email ID	 Barcode Identifier Barcode Mailer ID Barcode Serial Nurr Brand Display Nam Campaign Code Fields above will display Activate/Deactivate the Active Feed Indicator 	e in report, drag to reorder.	
		DELETE FEED	UPDATE FEED	

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

Review Updates for Example IDPC Data Feed	×
By clicking Confirm, you will be applying the following updates. Active Feed Indicator	
Deactivated	
ВАСК	CANCEL

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



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

IMPORTANT: Data Feed deletion cannot be undone.

To delete a data feed, complete the following:

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

Y	Your Feeds 🔀			Search		
	File Format	Frequency	Active	# of Failed Files	Output History	Details
	DELIMITED (deli	Daily	Active	-		i 🖉 🍈
	DELIMITED (deli	Daily	Active	-		
	DELIMITED (deli	Monthly	Active	-		
	DELIMITED (deli	4 Hour(s)	Active	-		



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

Details for Example IDPC Data Feed Ren Last Update Date/Time: 05/28/2020 02:36:30 PM CDT	Scroll to bottom of page to commit changes	
LOAD SAVED REPORT		SAVE REPORT
Entities Select CRID(s) Search for a CRID from the list below COMPANY NAME CRID LOAD SAVED ENTITY	Add MID(s) Search for a MID Q COMPANY NAME MID No MID found	Your selected MIDs COMPANY NAME CRID/MID Unknown 94825367 All MIDs Added -REMOVE
Feed Configuration Data Type Informed Delivery Post-Campaign File Format Delimited File Pipe N/A V N/A V	Define Target Select Conine Add a server Go to address book File Transfer Format Un-zipped TEST SERVER CONNECTION	Frequency 4 Hours * Start Time / Time Zone 12:00 AM * Central (UTC-6) *
LOAD SAVED FILTER ADD FILTER ID Post-Campaign Mail Tracking data retention is limited to 120 days		SAVE FILTER
LOAD SAVED VIEW Data Fields		SAVE VIEW
Add All Campaign Title Delivery Date eboc Submitter CRID eboc Submitter Name Email ID	 Remove All Barcode Identifier Barcode Mailer ID Barcode Serial Number Frand Display Name Campaign Code 	Fields above will display in report, drag to reorder. Activate/Deactivate the feed? ✔ Active Feed Indicator
		DELETE FEED UPDATE FEED



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

Confirm	×
Delete feed?	
YES Seamless Accentance	CANCEL

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



Troubleshooting Resources

Where to Find Help When You Need It



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

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



Informed Delivery Interactive Campaign help is available in two places:

1. Informed Delivery for Business Mailers

<u>Page</u> – a dedicated website with resources and documentation to support Informed Delivery interactive campaigns



How to Create & Submit Your Campaign

Review these helpful resources before submitting your campaign
Informed Delivery Overview PDE (2 MB)

Interactive Campaign Guide PDE (3 MB)



2. Informed Delivery Interactive Campaigns

<u>Support</u> – a dedicated group of Help Desk professionals who can assist with any interactive campaign questions





- The <u>Informed Delivery for Business Mailers Page</u> on usps.com provides a wealth of information about Informed Delivery interactive campaigns, including:
- <u>Mailer Campaign Portal User Guide</u> (in-depth information about signing up for the Mailer Campaign Portal and creating campaigns)
- Interactive Campaign Guide (in-depth information on the interactive campaign process and best practices)
- <u>PostalOne! Informed Delivery User Guide</u> (in depth information about creating a BCG account and setting up Mail.dat and Mail.XML for campaigns)
- <u>IDPC Data Dictionary</u> (detailed information about the actual data received)
- <u>IDPC Sample Data Set</u> (example data for each IDPC data field available in the IV-MTR application)

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

• To join the email list, please email <u>Michelle.N.Yarborough@usps.gov</u>



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

<u>USPSInformedDeliveryCampaigns@usps.gov</u>

1-877-329-7206

7 AM to 5 PM CT, Monday through Friday

(closed weekends and federal holidays observed by USPS)



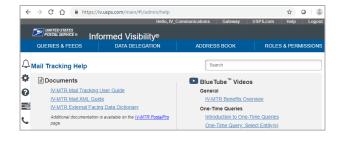


IV-MTR help is available in three places:

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

2. <u>PostalProTM IV-MTR page</u> – a knowledge base with all IV-MTR documentation and resources

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

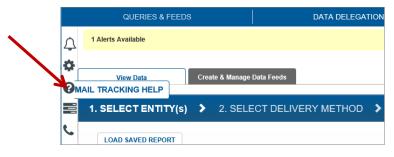




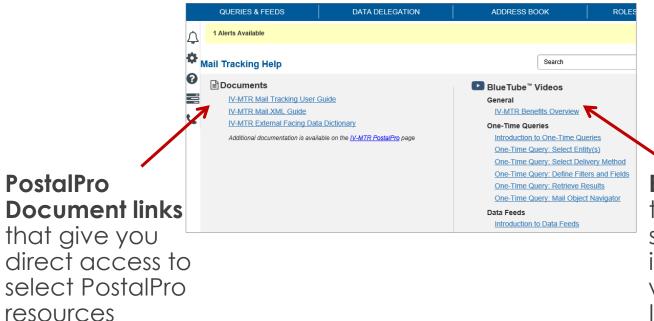




Access the IV-MTR Help Page from within the IV-MTR application by clicking the Question Mark bubble in the Widget Sidebar.



The IV-MTR Help page hosts:



BlueTube tutorial videos

that provide a library of step-by-step instructional videos that walk you through using IV-MTR 70



The <u>IV-MTR PostalPro</u> page provides a wealth of information about IV-MTR.

- Specific resources for IDPC include:
 - <u>IDPC Data Dictionary</u> (detailed information about the actual data received)
 - <u>IDPC Data Delegation form</u> (needed when coordinating data delegation with the IV Solutions Center)
 - <u>IDPC One-Time Query form</u> (needed when the IV Solutions Center completes a one-time query for you)

General resources for IV-MTR include:

- IV-MTR User Guide (the most in-depth information about IV-MTR)
- <u>Applying for Access</u> (instructions for setting up a new IV-MTR account)
- <u>IV-MTR Orientation Training</u> (introduction to the navigation and layout of the application)
- <u>Release Notes</u> (information about the most recent updates)
- <u>MTAC User Group 4 materials</u> (information about the open forum for USPS representatives and industry leaders to discuss mail visibility)



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

InformedVisibility@usps.gov

1-800-238-3150, Option #2

7 AM to 5 PM CT, Monday through Friday

(closed weekends and federal holidays observed by USPS)





Appendix A



Date	Version	Description
11/13/2020	1.1	Expanded data delegation appendix
6/20/2020	1.0	Initial version



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



Appendix B

File Characteristics & Conventions



File Type	Delimited	Delimited	JSON
Delivery Method	Send to Server (SFTP)	Download (One-Time Query)	Send to Server (Web Service POST)
File Extension	TXT	TXT	JSON
Compression	Option for zipped or unzipped	Always zipped	Option for zipped or unzipped
File Naming Convention	YYYYMMDDhhmmss_ID_CAMP AIGN_DETAIL_AAAA_BBBB.txt*	YYYYMMDDhhmmss_ID_CAM PAIGN_DETAIL_AAAA_BBBB.txt *	YYYYMMDDhhmmss_ID_CAMPAIGN_D ETAIL_AAAA_BBBB.json*
Example File Name	20181207112728_ID_CAMPAIG N_DETAIL_2XY4_0001.txt	20181207112728_ID_CAMPAI GN_DETAIL_2XY4_0001.txt	20181207112728_ID_CAMPAIGN_DETAI L_2XY4_0001.json
Column Headers	Included	Included	N/A
Delimiter Character	Selected by user	Selected by user	N/A
End of Line Character	Line feed (LF) "\n"	Line feed (LF) "\n"	N/A
Escape Character	"\"	"\"	N/A
Handling of Large Number of Records	Multiple files created if more than 100,000 records within the send interval.	Multiple files created if more than 100,000 records within the send interval.	Multiple messages/files created if more than 100,000 records within the send interval.
In-App Notification When Ready	Not available	Available	Not available
Displayed in Output History	Yes	Yes	Yes
Behavior if No Records	Blank file sent and appears in Output History	Blank file appears in Output History	No file will be sent and no blank file appears in Output History



File name: YYYYMMDDhhmmss_ID_CAMPAIGN_DETAIL_AAAA_BBBB.[extension]*

Where:

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



Appendix C

Adding Servers to the Address Book



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

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

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



To add a server or web service while creating a query/data feed, under the **Define Target** drop-down, click **Add a Server**. A window opens for you to enter the server details.

Select the **Protocol Type** and complete the remaining fields. When you are finished, click **ADD TO ADDRESS BOOK**. The new server or web service is added to your address book and is now available from the **Define Target** menu. Continue with the <u>one-time query</u> or <u>data feed</u> setup instructions.

Feed Data Type					
Select	•				
File Format	0.00	Detelle			×
Delimited File	• Ser	ver Details			0
Delimiter Multi-v	alue Delimi				
Comma 🔻	N/A	Protocol Type*	SFTP •		
Define Target	Online	CRIDs*	94825367 (Unknown)	Host Target Directory	
Add a server Go to address book	download	Host Description*		Host User Name*	
Un-zipped	•	Host Address*		Host Password*	
TEST SERVER CONNEC	TION	Port	22	Primary Contact*	Add a contact. Go to address book
		ADD TO A	ADDRESS BOOK	CANCEL	



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

	QUERIES & F	EEDS	DATA DEI	EGATION				ROLES & PERMI	SSIONS
	Servers	Contacts							
‡ 0	Add New Server		s	ervers				Search	
	Protocol Type*	HTTPS JSON 🗸	0	HOST DESCRIPTION	HOSTADDRESS	PORT	PRIMARY CONTACT	PROTOCOL TYPE	ACTION
C	CRIDs*	2 items selected 🔻	0	Testing	Testing	22	Elizabeth Bennett	SFTP	🕑 🔟 ^
	Web Service		0	Server 2	22.222.222.22	22	Fitzwilliam Darcy	SFTP	Ø
	Description*		0	XYZ SFTP Server	12.34.567.89	22	Elizabeth Bennett	SFTP	Ø
	Web Service URL*	https://	0	XYZ JSON Web Service	https://xyz.com/jsonapi	0		HTTP_JSON	Ø
	User ID		0	XYZ MailXML Web Service	https://xyz.com/entregapi/api	0		HTTP	Ø
	Password			USPS-Provided Server 🛕	USPS Provided Server	0	George Wickham	sftpserver	Ø
		TEST SERVER CONNECTION							~
		ADD TO ADDRESS BOOK	-		10 V items per page				> 1 - 7 of 6 items
		CANCEL							



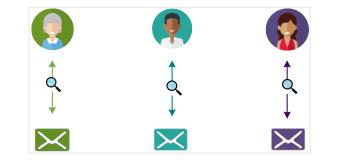
Appendix D

Data Delegation Overview



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

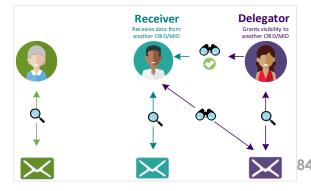
 In IV-MTR, each CRID has visibility of its own data.



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



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





There are two roles in data delegation:

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

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

Instructions for both methods are provided in this section.

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

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



Data Delegation in IV-MTR hinges on the following:

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

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



Data Delegation in IV-MTR hinges on the following:

- **Discretion of Delegator –** Delegating CRIDs have final say on 3. what visibility is shared.
 - Receivers can request the data and dates they prefer, but the delegator can modify any delegation at any time.
 - Receivers can be notified about modifications made to data 0 delegated to them. See the <u>IV-MTR User Guide</u>, section 12.4: Managing Notification Preferences.
 - If a new data type becomes available, the receiving party will need to submit a new data delegation form to receive that data type.
- 4. Manual Updating of Feeds/Reports with Delegated Data Delegated data is not automatically added to existing data feeds or saved reports.
 - After the receiver is granted visibility, they must update any existing data feeds or reports or create new feeds/saved reports manually.
 - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the receiver requested visibility of). 87



- The IV-MTR application provides a self-service data delegation area that allows organizations with IV-MTR accounts to share data without having to contact the Postal Service.
- Instructions for doing this are provided in this section.
- Only BSAs, BSA Delegates, or Data Delegation Managers can set up delegations.
- However, if one or both of the organizations **do not have access** to IV-MTR or **do not wish to set the delegation up** themselves, the **IV Solutions Center** can help facilitate the delegation.
 - Please contact the <u>IV Solutions Center</u> for more information.
- This appendix provides the essential instructions for setting up IDPC-specific delegations.
- If you need more detailed information about Data Delegations at any time, see the <u>IV-MTR User Guide</u>.



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

	POSTAL SERVICE ® Info	ormed Visibility®				
	QUERIES & FEED	s		ADDRES	S BOOK	ROLES & PERMISSIONS
\square	Request Data Delegation	Manage Data Delegation	Delegate Data to Others	Data Delegated to My CRID		

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



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

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



Use the table below to proceed.

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



Requesting Data Delegation

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



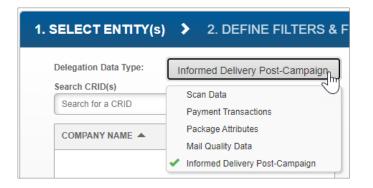
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Follow these steps to request data delegation:

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

		sibility®		
	QUERIES & FEEDS	DATA DELEGATION	ADDRESS BOOK	ROLES & PERMISSIONS
¢	Request Data Delegation Manage E	Data Delegation Delegate Data to Others	Data Delegated to My CRID	
Ф О	1. SELECT ENTITY(s) > 2. [DEFINE FILTERS & FIELDS 🗦 3. SEL	ECT RECIPIENT(s)	

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





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

1. SELECT ENTITY(s)	> 2. [DEFINE FILTERS &	FIELDS >	3. SELECT RECIPI	ENT(s)
Delegation Data Type: Search CRID(s) 94825367	Informed De	elivery Post-Campaign▼	Add MID(s) Search for	a MID	٩
COMPANY NAME		CRID	COMPANY	NAME	MID
IV COMMUNICATORS		Clear +SHOW MIDs		Select a CRID or search	l for MIDs

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

1. SELECT ENTITY(s)	> 2. DEFINE FILT	ERS & FIELDS 🗲 3. SELE	ECT RECIPIENT(s)		
Delegation Data Type: Info Search CRID(s) 94825367 COMPANY NAME	rmed Delivery Post-Campa	Add MID(s) Search for a MID COMPANY NAME	Q MID	Your selected CRIDs and MIDs COMPANY NAME IV COMMUNICATORS	CRID 94825367 900051234
					NEXT STEP



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

	TED CRID(s): TED MID(s):	94825367 900051234		
Choose	e Delegation E	Effective Dat	te Range	

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

1. SELE	ECT ENTITY(s)	> 2. DEFINE FILTERS & FIELDS > 3. SELECT RECIPIENT	-(s)
SELEC	TED CRID(s): 9482 TED MID(s): 90005	51234	
FROM	Delegation Effecti	TO Leave blank for no end	
PREVIC	DUS STEP		NEXT STEP



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

1. SELECT ENTITY(s)	> 2. DEFINE	FILTERS & FIELDS 🔉	3. SELECT RECI
Select CRID(s)		Add MID(s)	
Search for a CRID from the lis	t below	Search for a MID	٩
	CRID	COMPANY NAME	MID
IV DELEGATORS	+ ADD ALL CRIDs + SHOW MIDs	Select a CRID or set	arch for MIDs

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

1. SELECT ENTITY(s) > 2. DE	EFINE FILTERS & FIELDS 🕻 3. SELECT	recipient(s)
Select CRID(s)	Add MID(s)	Your selected CRIDs and MIDs
Search for a CRID from the list below	Search for a MID	COMPANY NAME CRID/MID
COMPANY NAME CRID	COMPANY NAME A MID	IV DELEGATORS 94825368 All MIDs Added
PREVIOUS STEP		SUBMIT



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

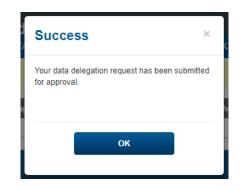
Entities	EDIT
Selected C	RID(s)and MID(s)
94825367 9000512	234

• If your request is ready to submit, click CONFIRM.

Please Confirm Last Update Date/Time:	×
Entities EDIT	Filters EDIT
Selected CRID(s)and MID(s)	Data Type
94825367 900051234	Informed Delivery Post- Campaign
	Recipients EDIT
	Selected CRID(s) and MID(s)
	94825368 All MIDs Added
	Delegation Effective Date Range EDIT From 07/29/2020 to No End Date
	CONFIRM



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



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



The Request History table lists all the delegation requests submitted by your CRID(s)/MID(s) and their statuses.

In this table, you can:

- **Determine a request's status** by locating its entry in the STATUS column
 - Note: If your delegation is marked as Pending for an extended period of time, contact the delegator or reach out to the <u>IV Solutions Center</u> for assistance.
- **Review the details** of a request by clicking its Details 🔲 icon.
- **Cancel a request** by clicking its Delete 🛍 icon.
 - Note: Delegation requests cannot be modified after they have been submitted. If you need to change something in a request, you must cancel the request and create a new one.

Request	Request History Search for CRID or MID											
RECEIVING CRID 🔺	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS	
94825367	IV Commu	ALL	Payment	IV_Commun	94825368	IV DELEGAT	ALL	07/28/2020	07/28/202	Request Pending	💷 🛍	
94825367	IV Commu	ALL	Payment	IV_Commun	94825368	IV DELEGAT	ALL	07/28/2020	07/28/202	Request Pending	💷 🛍	
94825367	IV Commu	ALL	Payment	IV_Commun	94825368	IV DELEGAT	ALL	02/18/2020	02/18/202	Request Cancel		
94825367	IV Commu	ALL	Container	IV_Commun	94825368	IV DELEGAT	ALL	06/22/2020	06/22/202	Request Rejected		
94825367	IV Commu	ALL	Bundle	IV_Commun	94825368	IV DELEGAT	ALL	06/22/2020	06/22/202	Request Rejected		
94825367	IV Commu	ALL	Handlin	IV_Comms	94825368	IV DELEGAT	ALL	02/18/2020	02/18/202	Request Rejected		
94825367	IV Commu	ALL	Mail Qu	IV_Comms	94825368	IV DELEGAT	ALL	12/05/2019	12/05/201	Request Appro	📰 🛍	
	RECEIVING ND RECEIVING MID RECEIVING MID RECEIVING MID RECUISTOR TYPE REQUESTOR CRID DELEGATING COMPANY DELEGATING MID REQUEST DATE FFFCTIVE FOR STATUS DETAILS 825367 IV Commu ALL Payment IV_Commu 94825368 IV DELEGAT ALL 07/28/2020 07/28/2020 Request Pending Image:											



Viewing Data Delegated to You



Follow these steps to view the data other CRIDs are sharing with you:

- 1. Log into IV-MTR and click the **Data Delegation** tab.
- 2. In the Data Delegation area, click **Data Delegated to My CRID**.
- 3. The Data Delegated to My CRID screen appears, with a table listing all active delegations.

The **Data Type** drop down allows you to filter delegations records by data type.

- Note: If you have over 50,000 records, you will be required to choose a data type from the menu before records will display.
- The Export 🖸 icon allows you to download a list of all delegations.

The Details 🔲 icon allows you to view the details of each delegation.

Request Data D	elegation Manag	ge Data Delegation	Delegate Data to (Others Data Del	legated to My CRID		
Data Type	All	•					
Data Delega	ted to My CRID	3				Search for CRIE	D or MID
MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	≣ ŵ
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	💷 🛍
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	💷 🛍
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	💷 🛍
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	Ⅲ 前
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	💷 🛍
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	Ⅲ ⑪
4 4 4 1	_ <u>(</u> 2 ► ► 10	✓ items per page					► 1 - 10 of 16 items



Deleting Data Delegated to You

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



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

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

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

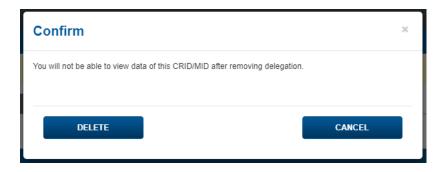
To delete an existing delegation, complete the following:

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

Request Data De	elegation Manag	ge Data Delegation	Delegate Data to C)thers Data Del	egated to My CRID		
Data Type	All	•					
Data Delega	ted to My CRID	3				Search for CRI	D or MID
MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	□ ① ^ˆ
Package	IV_Comms_Delega	94825368	IV DELEGATOR\$	ALL	02/18/2020	02/18/2020 to No End Date	💷 🏛
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	і іі
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	і іі
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	💷 🛍
Package	IV_Comms_Delega	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	і іі
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	□ ①
		V items per page					1 - 10 of 16 items
		✓ items per page					1 - 10 of 16 items



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



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

Success	×
Delegation request cancellation has been successfully processed	
ок	



Delegating Data to Others

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



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

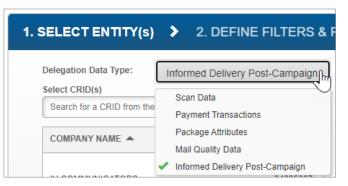
To begin, access the Delegate Data to Others area of the application:

- 1. Log into IV-MTR and click the **Data Delegation** tab.
- 2. In the Data Delegation area, click **Delegate Data to Others**.



Follow these steps to delegate data:

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





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

1.	SELECT ENTITY(s) >	2. DEFINE FILTE	ERS & FIELDS	>	3. SELECT	RECIP	PIENT(s)
	Delegation Data Type: Informed Select CRID(s) Search for a CRID from the list belo	I Delivery Post-Campaig	Add MID(s) Search for	a MID			٩
	COMPANY NAME	CRID	COMPANY	NAME		MID	
	IV COMMUNICATORS	+ ADD ALL CRIDs + SHOW MIDs 94		Sele	ct a CRID or searcl	h for MIDs	

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

SELECT ENTITY(S)	2. DEFINE FILTER	RS & FIELDS 🔉 3. SELE	ECT RECIPIENT(s)		
Delegation Data Type: Infor Select CRID(s)	med Delivery Post-Campaign	Add MID(s)		Your selected CRIDs and M	IDs
Search for a CRID from the list	below	Search for a MID	Q	COMPANY NAME	CRID
COMPANY NAME	CRID + ADD ALL CRIDs 94826032	COMPANY NAME	MID		94825367 All MIDs Added
					NEXT STEP



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

Choose	Delegation Effective Date Rang	ge			
FROM	07/29/2020		то	Leave blank for no end date	

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

If necessary, please provide any additional explanation for delegating data below.	
in necessary, please provide any additional explanation for delegating data below.	
	*
	_
	×

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

▼	
PREVIOUS STEP NEXT STEP	



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

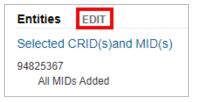
1. SELECT ENTITY(s	6) 🕨 2. DEFIN	E FILTERS & FIELDS	> 3. SELEC	TRECIPIENT(s)	
Search CRID(s)		Add MID(s)		Your selected CRIDs and N	llDs
94825368	٩	Search for a MID	Q	COMPANY NAME	CRID/MID
COMPANY NAME	CRID	COMPANY NAME	MID		
IV DELEGATOR\$	Clear +SHOW MIDs	Select a CRID or se	arch for MIDs		

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

2. DEFINI	E FILTERS & FIELDS	> 3. SELE	CT RECIPIENT(s)	
	Add MID(s)		Your selected CRIDs and M	
			IV DELEGATORS	CRID/MID 94825368
				901060362
				SUBMIT
	2. DEFINI	Add MID(s) Search for a MID	Add MID(s) Q Search for a MID	Add MID(s) Search for a MID Q Your selected CRIDs and M COMPANY NAME



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

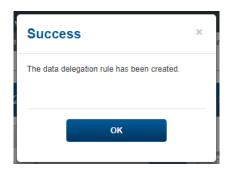


• If your delegation is ready to submit, click CONFIRM.

Please Confirm Last Update Date/Time:	×
Entities EDIT	Filters EDIT
Selected CRID(s)and MID(s)	Data Type
94825367 All MIDs Added	Informed Delivery Post-Campaign
	Recipients EDIT
	Selected CRID(s) and MID(s)
	94825368 901060362
	Delegation Effective Date Range EDIT From 07/30/2020 to No End Date
	CONFIRM



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



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



Reviewing Data Delegation Requests

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



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

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

To begin, access the Manage Data Delegation area of the application:

- 1. Log into IV-MTR and click the **Data Delegation** tab.
- 2. In the Data Delegation area, click **Manage Data Delegation**.
- 3. The Manage Data Delegation screen appears, with the number of pending requests listed in the tab and the requests themselves in the Data Delegation Requests Pending Approval table.

	Request Data Delegation	on Mana	age Data Delega	tion 6	Delegate Data to	Others	Data Delegated to	My CRID				
D	ata Delegation I	Requests P	ending App	roval					Sea	arch for CRID or I	MID	
0	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTIC	ON
0	94826032 (3 requ										~	× ^
0	94825559 (1 requ										1	×
0	94825367 (2 requ										~	×

• Requests are grouped by the CRID that is requesting the delegation.



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

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

C	Data Delegation Requests Pending Approval											
٥	RECEIVING CRID	REQUE ST DATE	EFFECTIVE FOR	ACTION								
٥	94825367 (2 requ										🗸 🗙	

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

D	ata Delegation F		Search for CRID or MID								
•	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ										🗸 🗙
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🖌 🗙
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🗸 🗙

- 3. Proceed as follows:
 - <u>Approving requests</u>
 - Denying requests



To approve requests:

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

D	Data Delegation Requests Pending Approval												
0	RECEIVING CRID	REQUE ST DATE	EFFECTIVE FOR	ACTION									
	94825367 (2 requ										🗸 🗙		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🖌 🗙		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🗸 🗙		

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

D	Data Delegation Requests Pending Approval												
•	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION		
	94825367 (2 requ										🖌 🗙		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🖌 🗙		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🗸 🗙		

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



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

To deny requests:

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

D	Data Delegation Requests Pending Approval												
0	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION		
	94825367 (2 requ										🖌 🗙		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	~ ×		
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🗸 🗙		

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

C	ata Delegation F		Search for CRID or MID								
٠	RECEIVING CRID RECEIVING COMPANY RECEIVING MAIL OBJECT TYPE REQUESTOR DELEGATING COMPANY DELEGATING										ACTION
•	94825367 (2 requ										~ ×
	94825367	IV COMM	ALL	Payment	IV_Commu	94825368	IV DELEGA	ALL	07/28/2020	07/28/202	🗸 🗙

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



Modifying & Deleting Existing Delegations

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



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

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

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

The following modifications are available for IDPC delegations:

- 1. Updating the end date to a date (today or future)
 - If you would like to update the end date so data is delegated indefinitely, please contact the <u>IV Solutions Center</u>.
- If you would like to change any other aspect of the delegation (including the recipients or data types), a new delegation must be created.
- If desired, you can delete the existing delegation using the instructions in this section.

Proceed as follows:

- Modifying an Existing Delegation
- <u>Deleting an Existing Delegation</u>



To modify an existing delegation, complete the following:

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

Data Del	Data Delegation Authorization History												
RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS		
94825367	IV COMMUNI	ALL	Piece	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap			
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	07/28/20	07/28/202	Request Ap			
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	07/28/20	07/28/202	Request Ap			
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ca			
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap			
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap			
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap			
•											+		
$\begin{bmatrix} \bullet & \bullet \\ \bullet $											1 👷 10 of 20 items		



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

-	/ Delegatio	n			×
	g CRID(s): 948253 g MID(s): ALL	68 (IV DELEGA	(TORS)		
Data Ty Transact	· •				
Data Ty Address	ype Details Quality				
Choos	e Delegation Ef	fective Date	Range		
FROM	07/31/2020	то	12/31/2020		
				DELETE DELEGATION	UPDATE DELEGATION

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

Success		×
Your request has been submitted succes	ssfully.	
	ОК	



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

- Once a deletion is made, the change will be reflected within about 15 minutes.
- All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

To delete an existing delegation, complete the following:

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

Data Delegation Authorization History						Search for CRID or MID					
RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV COMMUNI	ALL	Piece	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap	
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	07/28/20	07/28/202	Request Ap	
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	07/28/20	07/28/202	Request Ap	
94825367	IV COMMUNI	ALL	Payment	IV_Commu	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ca	
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap	
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap	
94825367	IV COMMUNI	ALL	Package	IV_Comms	94825368	IV DELEGAT	ALL	02/18/20	02/18/202	Request Ap	
A 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1							► I				
						1 👷 10 of 20 items					



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

Modify Delegation Last Update Date/Time:	×
Requesting CRID(s): 94825367 (IV COMMUNICATORS) Requesting MID(s): ALL	
Data Type iCAPS Invoices	
Choose Delegation Effective Date Range	
FROM 07/28/2020 TO Leave blank for no end	
	DELETE DELEGATION UPDATE DELEGATION

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

Conf	firm	×
Select	Reason(s)	
	CRID/MID Owner denied request	
	DELETE CAN	ICEL
	DELETE	ICEL ,



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

Success		×
Delegation request rejection has	s been successfully processe	d
	ок	